



# Data Retention

Webinar handout  
Version: August 15, 2024

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## Table of Contents

About this document.....	2
Enterprise vs. Essentials .....	2
What are data retention policies?.....	2
Data retention service .....	2
View/edit the policy settings .....	3
Basic settings.....	4
Policy settings .....	5
Default settings.....	6
Agent Transactions and History.....	6
Audits and Alerts .....	6
Contact Volume and Data Collection .....	7
Forecasting.....	8
Notifications and Memos .....	8
Schedule and Adherence.....	9
System Internal Data .....	11
Database maintenance .....	12
Database health and statistics.....	12

## About this document

This document accompanies the CommunityWFM College webinar *Data Retention*. It includes additional details and step-by-step instructions for completing the tasks discussed during the webinar.

**Note:** Prior to make any changes to settings for data retention, we recommend contacting the support desk and reviewing any proposed changes. Once data is deleted, it cannot be recovered.

## Enterprise vs. Essentials

The option to view and edit the data retention policies is only available in the Enterprise product. Essentials includes the default settings.

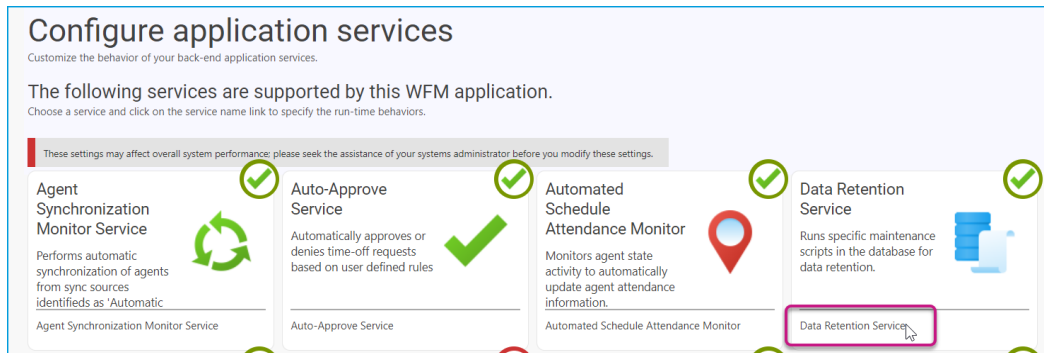
## What are data retention policies?

Data retention policies are CommunityWFM's way of cleaning and maintaining your database. Each policy addresses a specific data set such as historical call volume or forecast data. A Windows service (enabled in Settings > Application settings > Administrative settings > Services > Data Retention Service) manages the scheduling and execution of each policy.

## Data retention service

This is where the parameters are set to check for changes to a policy setting and to enable the running of the policies.

Settings > Application settings > Administrative settings > Services.

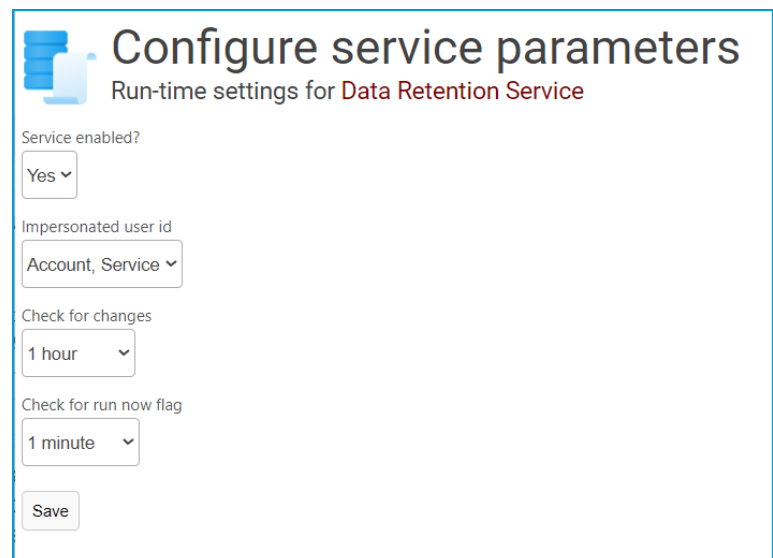


**Service enabled?** Default is *Yes*. Change to *No* (not recommended) to turn off running any of the policies, even if an individual policy is set to run.

**Impersonated user id:** Typically leave as *Account, Service*.

**Check for changes:** How often the system checks for changes to the policy settings. Default is 1 hour; options 1–10 minutes, 15 or 30 minutes, or 1 hour.

**Check for run now flag:** How often the system checks for the request to *Run now*. Default is 1 minute; options 5, 10, 15, or 30 seconds, or 1 minute.



## View/edit the policy settings

To view and edit the policy settings, navigate to Settings > Application settings > Administrative settings > Data retention policy.

The green **i** indicates that all instances of the policy are active.



A red **i** indicates that no instances of the policy are running.



To view the details or edit a policy, click *Edit*.

### Data retention policy worksheet

Establish your data retention policies for various components of the application.

#### Agent transactions and history

<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: #007bff; margin-right: 5px;"></div> <div> <p>Agent Schedule Transaction Detail Retention Policy</p> <p><small>Success: True Last Ran: Friday, 05 Jan 2024 06:00:02 am</small></p> </div> <div style="margin-left: auto; text-align: right;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #007bff; border-radius: 50%; display: flex; align-items: center; justify-content: center; margin-right: 5px; color: white; font-size: 8px;">i</div> <input type="button" value="Edit..."/> </div> </div> </div>
<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: #007bff; margin-right: 5px;"></div> <div> <p>Agent Sync Template Audit Detail Retention Policy</p> <p><small>Success: True Last Ran: Friday, 05 Jan 2024 06:00:02 am</small></p> </div> <div style="margin-left: auto; text-align: right;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #007bff; border-radius: 50%; display: flex; align-items: center; justify-content: center; margin-right: 5px; color: white; font-size: 8px;">i</div> <input type="button" value="Edit..."/> </div> </div> </div>

#### Audits and alerts

<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: #007bff; margin-right: 5px;"></div> <div> <p>System Change Audit Detail Retention Policy</p> <p><small>Success: True Last Ran: Friday, 05 Jan 2024 06:00:02 am</small></p> </div> <div style="margin-left: auto; text-align: right;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #007bff; border-radius: 50%; display: flex; align-items: center; justify-content: center; margin-right: 5px; color: white; font-size: 8px;">i</div> <input type="button" value="Edit..."/> </div> </div> </div>
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#### Contact volume and data collection

<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: #007bff; margin-right: 5px;"></div> <div> <p>Contact Volume History Retention Policy</p> <p><small>Success: True Last Ran: Thursday, 04 Jun 2020 11:53:27 am</small></p> </div> <div style="margin-left: auto; text-align: right;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #dc3545; border-radius: 50%; display: flex; align-items: center; justify-content: center; margin-right: 5px; color: white; font-size: 8px;">i</div> <input type="button" value="Edit..."/> </div> </div> </div>
<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: #007bff; margin-right: 5px;"></div> <div> <p>Contact Volume Import Log Truncate Policy</p> <p><small>Success: True Last Ran: Sunday, 31 Dec 2023 06:00:00 am</small></p> </div> <div style="margin-left: auto; text-align: right;"> <div style="display: flex; align-items: center;"> <div style="width: 15px; height: 15px; background-color: #007bff; border-radius: 50%; display: flex; align-items: center; justify-content: center; margin-right: 5px; color: white; font-size: 8px;">i</div> <input type="button" value="Edit..."/> </div> </div> </div>

Each policy includes the date and time the policy last ran.

Agent Schedule Transaction Detail Retention Policy

Success: True Last Ran: Monday, 08 Jul 2024 08:55:52 pm

The edit option includes **basic** settings and **policy** settings. They are similar in most policies.

## Basic settings

**Data Manager Type:** The name of the policy.

**Friendly Name:** You may edit this name.

**Execution Interval:** How often the service should run.

**Update Time:** What time to update at that interval.

**Data Manager Active:** Uncheck to stop running. The policy will show a red i.



### Basic settings

Data Manager Type: Agent Schedule Transaction Detail Retention Policy

Friendly Name:

Execution Interval:

Update Time:  :  :

Data Manager Active:

Daily

- Daily
- Every Sunday
- Every Monday
- Every Tuesday
- Every Wednesday
- Every Thursday
- Every Friday
- Every Saturday
- Once a month on the 1st
- Every Year on Jan 1st
- Manual

## Policy settings

Not all components have options for policy settings.

**Data to keep in days:** This is where you can set the number of days the system will keep this data.

**UserId:** Recommend keeping as the service account.

### Policy settings

Data to Keep in Days:

UserId:

**Run now:** At the bottom of each Policy settings is a button to *Run now*. After clicking, there is a confirmation message. The policy will run after the amount of time set in Services to *Check for run now flag*.

### Policy settings

Data to Keep in Days:

Run Now Set Flag Succeeded

**Example of when you might *Run now*:** you are changing your internal policy for adherence data to keep 90 days of data instead of one year.

## Default settings

The default settings are recommended by CommunityWFM as best practice for data retention.

### Agent Transactions and History

<b>Agent Schedule Transaction Detail</b>	<i>Defaults</i>
Friendly Name:	Default 180 Day Agent Transaction Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	180
User Id:	<b><i>Will need to pick one before running</i></b>
<b>Agent Sync Group Audit Detail</b>	<i>Defaults</i>
Friendly Name:	Default 30 Day Agent Sync Audit Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	30

### Audits and Alerts

<b>System Change Audit Detail</b>	<i>Defaults</i>
Friendly Name:	Default 1 Year System Change Detail Audit Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	365

## Contact Volume and Data Collection

<b>Contact Volume History</b>	<i>Defaults</i>
Friendly Name:	Default 5 Year Contact Volume Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	1825
<b>Contact Volume Import Log Truncate</b>	<i>Defaults</i>
Friendly Name:	Default Weekly Import Log Truncate Policy
Execution Interval:	Every Sunday
Update Time:	12:00 AM
<b>Contact Volume Retention Policy (Collection Point)</b>	<b><i>Not Enabled by Default</i></b>
<b>Temporary Call Event Data</b>	<i>Defaults</i>
Friendly Name:	Default Temporary Call Data 7 Day Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	7
User Id:	<b><i>Will need to pick one before running</i></b>

## Forecasting

<b>Published Forecast Detail</b>	<i>Defaults</i>
Friendly Name:	Default 24 Month Published Forecast Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	730
User Id:	<b><i>Will need to pick one before running</i></b>
<b>Working Forecast</b>	<i>Defaults</i>
Friendly Name:	Default 12 Month Working Forecast Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	365
User Id:	<b><i>Will need to pick one before running</i></b>

## Notifications and Memos

<b>Memo Detail</b>	<i>Defaults</i>
Friendly Name:	Default 180 Day Memo Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	180
<b>Notification Detail</b>	<i>Defaults</i>
Friendly Name:	Default 30 Day Notification Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	30

## Schedule and Adherence

<b>Adherence Data Detail</b>	<i>Defaults</i>
Friendly Name:	Default 90 Day Adherence Data Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	90
<b>ASAP Plan Detail</b>	<i>Defaults</i>
Friendly Name:	Default 90 Day ASAP Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	90
<b>Check-In Data</b>	<i>Defaults</i>
Friendly Name:	Default 90 Day Check-In Details Policy
Execution Interval:	Daily
Update Time:	1:00 AM
Data to Keep in Days:	90
<b>Published Schedule Detail</b>	<i>Defaults</i>
Friendly Name:	Default 2 Year Published Schedule Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	730
User Id:	<b><i>Will need to pick one before running</i></b>

<b>Schedule Bids</b>	<i>Defaults</i>
Friendly Name:	Default 1 Year Schedule Bid Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	365
<b>Schedule Generation Audit Detail</b>	<i>Defaults</i>
Friendly Name:	Default 7 Day Schedule Generation Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	7
<b>Working Schedule Detail</b>	<i>Defaults</i>
Friendly Name:	Default 1 Year Working Schedule Detail Policy
Execution Interval:	Daily
Update Time:	12:00 AM
Data to Keep in Days:	365
User Id:	<b><i>Will need to pick one before running</i></b>

## System Internal Data

<b>Intermediate Forecasting Data Truncate</b>	<i>Defaults</i>
Friendly Name:	Default Daily Intermediate Forecast Data Policy
Execution Interval:	Daily
Update Time:	12:00 AM
<b>Intermediate Schedule Data Truncate</b>	<i>Defaults</i>
Friendly Name:	Default Daily Intermediate Schedule Data Policy
Execution Interval:	Daily
Update Time:	12:00 AM
<b>Temporary Image Data Truncate</b>	<i>Defaults</i>
Friendly Name:	Default Daily Temporary System Images Policy
Execution Interval:	Daily
Update Time:	12:00 AM
<b>Third-Party Data Import Truncate</b>	<i>Defaults</i>
Friendly Name:	Default Daily 3rd Party Import Data Policy
Execution Interval:	Daily
Update Time:	12:00 AM

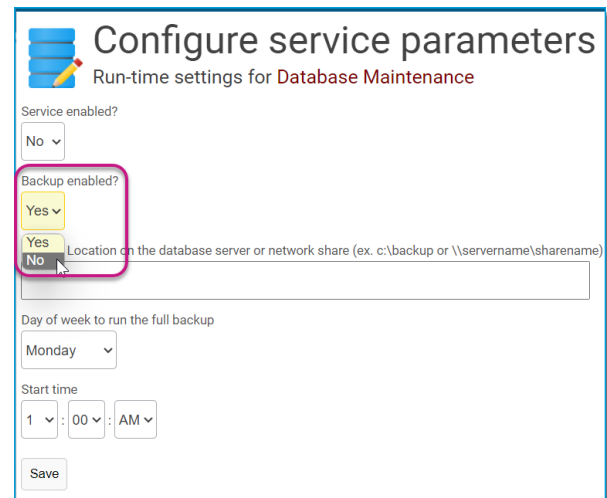
## Database maintenance

Settings > Application settings > Administrative settings > Services.

This is for backing up your CommunityWFM database. Note that this process uses significant system resources and it's best to perform the backup when the center is closed or a slow time.

The backup is stored outside of CommunityWFM.

In version 5.1SP2 there is an option in the application settings to separate the backup and database health utility, creating the ability run the database health utility without creating a backup. Set *Backup enabled?* to *No* then *Save*



**Configure service parameters**  
Run-time settings for **Database Maintenance**

Service enabled?  
No

Backup enabled?  
Yes

Location on the database server or network share (ex. c:\backup or \\servername\sharename)

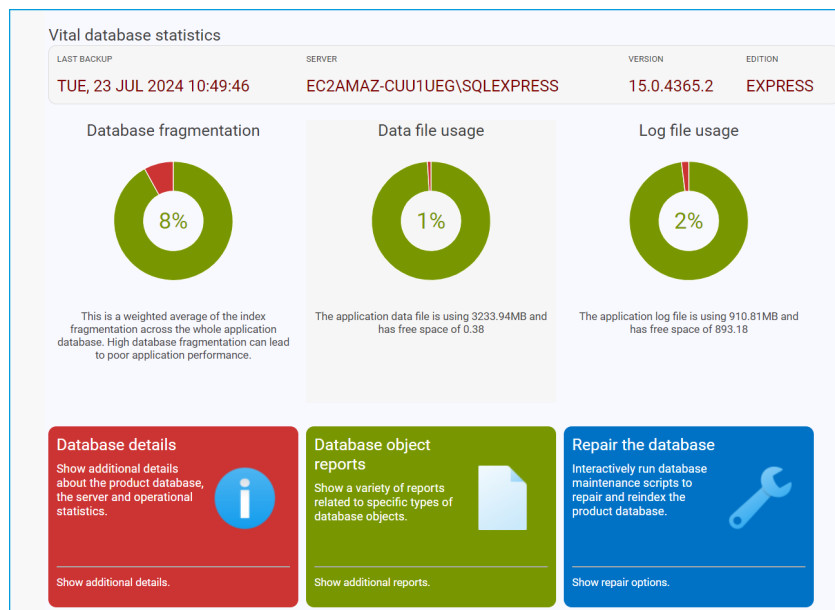
Day of week to run the full backup  
Monday

Start time  
1 : 00 : AM

Save

## Database health and statistics





To view an overview of your database health, including data and log file usage, navigate to Report > Administrative & utility > Database health and statistics.



To view more details, in the Database object reports tile click *Show additional reports*.

### Report options

These reports provide additional details about the size and health of various database objects.

- 
**Table size report**  
 Show the size and row counts for each table in the application database.
- 
**Index size report**  
 Show the size of the indexes.
- 
**Index fragmentation report**  
 Show the index fragmentation.
- 
**Command log report**  
 Review the command execution log that shows the history of maintenance commands executed against the application database.

The *Table size report* shows the amount of data in each row and is exportable to .csv or .xlsx

## Community Enterprise Model

Optimized by Community WFM

### Database table size report

15 August 2024 13:51:41

Table Name	Row Count	Total Space (MB)	Used Space (MB)	Unused Space (MB)
t_adherence_data	4254536	453.02	452.94	0.08
t_intermediate_forecast_deferred_projection_intervals	3075807	138.32	135.59	2.73
t_published_forecast_agent_requirements_intervals	1674624	238.95	238.93	0.02
ScheduleIntervalSummary	1492456	188.46	188.23	0.23
AdherenceIntervalSummary	1421392	73.26	73.21	0.05
AgentScheduleChangeEvent	1355979	167.64	167.55	0.09
t_forecast_agent_requirements_intervals	1229760	222.2	221.79	0.41
t_forecast_import_contact_volume	835312	31.26	31.18	0.08
t_forecast_intervals	805056	59.27	59.14	0.13