Capita

Capita One EXPO 2022

Archive & Delete

Welcome and Agenda

1. What is Archive and Delete
2. Key benefits
3. How can we help
4. What we can offer

What is Archive and Delete?

What can it do?

- Create Archive copies of data

- Delete data

- Remove links

- Delete data based on a 'Right to be forgotten request'.

Requirements

- Setup of defaults in System Admin

- Setup of Scheduled tasks

- Creation of SSRS identification reports

- Creation of SSRS archive reports (if required)

- SQL for the creation of the reports

- Process flow

How can Professional Services help?

- Understanding

- Setup TEST and LIVE

- Report pack

- Alerts

- Previous experience

- Expert advice

- Professional Services can also create bespoke archive reports if required.

Session 1 - Overview of functionality

- **Purpose of Archive and Delete**

- **Data retention policies**

- **System defaults**

- **Alerts**

- **Permissions**

- **Running identification reports**

- **Archiving data**

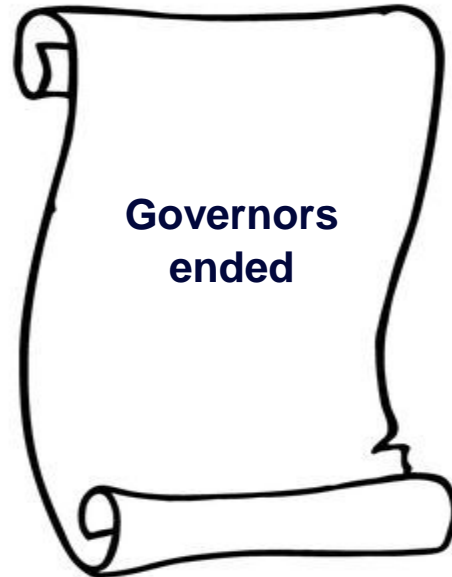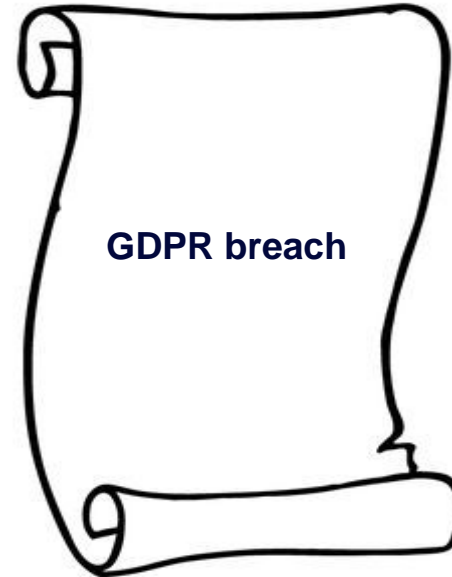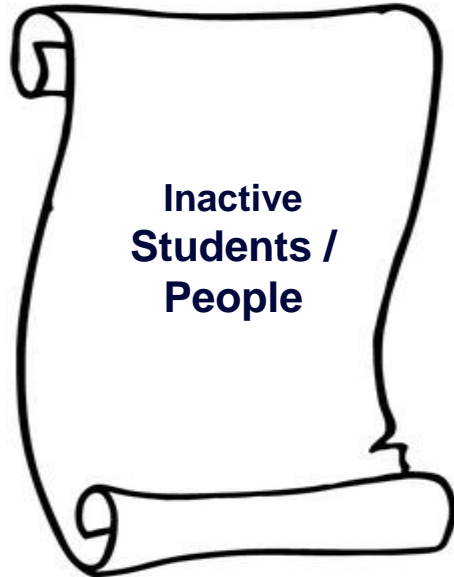- **Marking records for deletion**

- **Scheduled tasks**

Session 2 and 3 – Setup TEST and LIVE
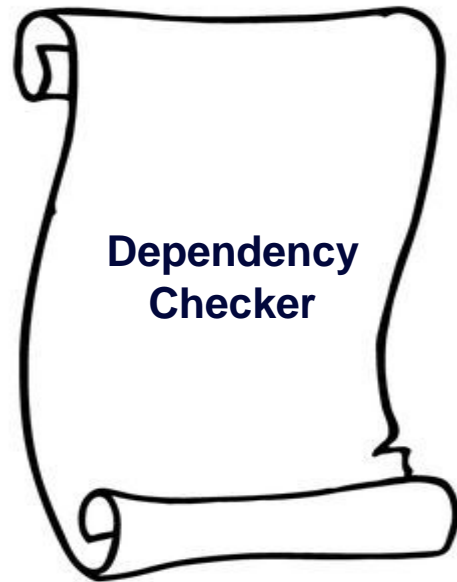
Setup

- System defaults

- Permission groups

- Schedule tasks for deletion and delete log file purge

- Alerts (maximum of 6)

- Ensure example archive and identification reports are connecting to the correct data source

Reports - Identification

Inactive **Students / People**

Not Updated **Students / People**

GDPR breach

Base Contacts ended

Governors ended

Unattached *Students / People*

Reports - Checking

Dependency Checker

Delete Progress

Alerts

Record identified for deletion but not yet added to the delete routine.

Record added to the delete routine.

Record has been selected to have information archived.

Records have completed the archive process and are ready to be deleted.

Records have failed the archive process.

Records failed the delete process

Key Benefits

Compliance with the Local Authorities retention policies

Compliance with the GDPR principle of:

- Storage limitation
- Accuracy
- Reduce the risk of fines

Smaller database footprint:

- Improving response speeds to record access and reporting
- Improving speed of disaster recovery with faster back up and recovery
- Reducing storage space required for both live operation and backup

Cleaner data:

- Better reporting upon which to make better decisions
- Increased productivity by making records easier to find
- Improved FOI

Customer Feedback

"We had submitted our requirements to Capita in advance of the training and Capita were able to explain how each element could be met including areas which could be addressed outside of the A&D process. Andy showed great patience, particularly as some of the attendees were looking at this functionality for the first time and there needed to be quite a bit of technical intervention to deal with some of our technical issues".

"During the various sessions we experienced a number of technical issues relating entirely to our set up and this caused us to postpone a number of sessions. Capita were flexible enough to rearrange sessions at short notice and respond to ad hoc queries throughout"

"The benefit of the service was to increase our confidence in using it".

Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

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Thank you