# Overview

The purpose of this document is to archive the Case records from the SFDC platform in a comma separated value file format for Philly311 CRM.

# Citywide Data Archival Requirements

The city has requested that all data purged according the city’s predefined retention schedule.

Each department is responsible for their own retention policies for data stored on their legacy work order systems (Hansen & CityWorks).

311's draft retention policy is copied below.

|  |  |  |
| --- | --- | --- |
| **Series Name** | **Description** | **Retention**  **(Years)** |
| Complaints | Complaints received about various City service providers such as EMS, Police and others. Note: Records may be electronic or hardcopy. | 3 |
| Service Requests - Routine | Citizen requests for various services such as street repair, snow removal, etc. | 3 |
| Service Requests Potentially Dangerous Conditions | Citizen requests for attention to potentially dangerous situations or conditions or requests involved in litigation. | 5 |
| Information Requests | Requests for directory assistance and general information. May be used as statistics in support of other City departments. | 3 |

# Action Items – The City

# Action Items – Unisys

* Develop, distribute and review a data archival design document.
* Develop the Case Purge Job to permit extraction of constituent records from the SFDC Service Cloud platform.
* Conduct a unit test on the data archival script.
* Develop, distribute and review a data archival test plan..
* Provide the City with results of the data archival test.
  + All targeted records are exported per the design specification
  + All of the exported record fields are visible per the design specification

# Deliverables

* Technical Requirements Definition Document
  + Data Archival Requirements Definition Document
* Technical Detail Design Document
  + Data Archival Design Document
* Case Purge Job setup

# Assumptions

* The City of Philadelphia will provide Unisys the data archival rules during the requirements session.
* The City of Philadelphia will validate the customer records that were exported for testing purposes from the production instance of the SFDC platform.
* The purge job will be scheduled to run at 6:00 am daily.

# Appendix C Requirements

| **Reference Number** | **Service Request Requirements** | **Type** | **Implementation Plan** | **How Provided** | **Workshop Notes** |
| --- | --- | --- | --- | --- | --- |
| 5.10 | The solution provides ability for reports to be run against both current and archived data | SR | SFDC Service Cloud application will be configured to implement reporting on data that exists in the SFDC application (i.e. current data). Archived data will be exported outside of the application (i.e. in flat files or external DB). The City will be responsible for reporting from this archived data. The City and Unisys agree that the reporting of archived data is not within the scope of the Project. | SFDC Service Cloud for current data only | Data will be held on Salesforce until it is purged, so standard reporting will still be applicable. |
| 5.33 | The solution provides the ability to export report data into other applications and formats (e.g. PowerPoint, Excel, Adobe, comma delimited, SQL, etc.) | F | SFDC Service Cloud application will be configured to extract data in a CSV, XLS or PDF format | SFDC Service Cloud | Yes from reports or data archival tool. |
| 6.27 | The solution provides the ability to view the entire history of data inputted even if it has been archived. | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Per the City's data archival policy, we are not archiving any records. Additionally, up to 20 fields per object can be configured to view the history of those records. The City has not specified field history in the requirements. |
| 1.54 | The solution provides ability to flag a service request as "under investigation". This will cause the system to retain the service request and all associated attachments as long as the record remains under investigation, even if normal records retention policy rules would have deleted it. | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Flagged records will be retained for five (5) years per the city’s standard retention policy. |
| 6.27 | The solution provides the ability to view the entire history of data inputted even if it has been archived. | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Per the City's data archival policy, we are not archiving any records. Additionally, up to 20 fields per object can be configured to view the history of those records. The City has not specified field history in the requirements. |
| 14.137 | Unisys will conduct a requirement validation and design sessions for Data Archival requirement |  |  |  | Session has been completed. |
| 14.138 | Unisys will develop, distribute and review a data archival design document. |  |  |  | Design document to be completed. |
| 14.139 | Unisys will develop the data archival script to permit extraction of constituent records from the SFDC Service Cloud platform. |  |  |  | Purge script to be completed. |
| 14.140 | Unisys will conduct a unit test on the data archival script. |  |  |  | Purge script to be tested. |
| 14.141 | Unisys will develop, distribute and review a data archival test plan. |  |  |  | City will be provided will test results. |
| 14.142 | Unisys will export customer records from the Test and Production (for testing purposes only) instances of the SFDC Service Cloud platform to a target provided by the City using the Dataloader.io service. |  |  |  | Data to be retained in SFDC. Dataloader.io will not be required per city requirements. |
| 14.143 | Unisys will provide the City with results of the data archival test. o All targeted records are exported per the design specification o All of the exported record fields are visible per the design specification |  |  |  | City will be provided will test results. |
| 6.28 | The system provides the ability to reload the data once it is archived | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Per city policy, once the data is purged it will not be recoverable, but will be accessible up to that point. |
| 6.29 | The system has the ability to report off the data once it is archived | **N** | Archived data will be exported outside of the Salesforce Service Cloud application (i.e. in flat files or external DB). The City will be responsible for reporting from this archived data. The City and Unisys agree that the reporting of archived data is not within the scope of the Project. | **Not Provided** | Data will be accessible until it is purged. |
| 6.33 | The software provides a method for backing up files and/or creating redundant data | F | SFDC Service Cloud application will be configured to use Dataloader.io service to create archives based on predefined criteria per the requirements and store it to the City desired location at a scheduled interval. | **Dataloader.io** | Method exists, but is not being implemented due to the lack of a use case. |
| 6.35 | The solution enables compliance with City records retention policy, allowing retention and accessibility of data for as long as needed and enabling complete deletion from all active and archived instances as per policy | F | SFDC Service Cloud application will be configured to retain current data per the City's retention policy. Archived data will not be retained within the SFDC Service Cloud application. The City and Unisys agree that retention management activities on archived data, including deletion, with be the responibility of the City and that these activities are not within scope of the Project. | SFDC Service Cloud | Purge script is being prepared based on the retention schedule provided by the city. |
| 8.02 | The solution provide the ability for the client to own the data | F | SFDC Service Cloud application will be configured to use Dataloader.io service to create archives based on predefined criteria per the requirements and store it to the City's Box account or any other location desired by the City at a scheduled interval. SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Data will be the property of the City of Philadelphia. |
| 8.03 | The solution provides for the periodic downloads of data to the client servers | TP | SFDC Service Cloud application will be configured to use Dataloader.io service to create archives based on predefined criteria per the requirements and store it to the City desired location at a scheduled interval. | **Dataloader.io** | Method exists, but is not being implemented due to the lack of a use case. |