ARCHIVING WEATHERIZATION ASSISTANT CLIENT RECORDS
Updated 4/7/14

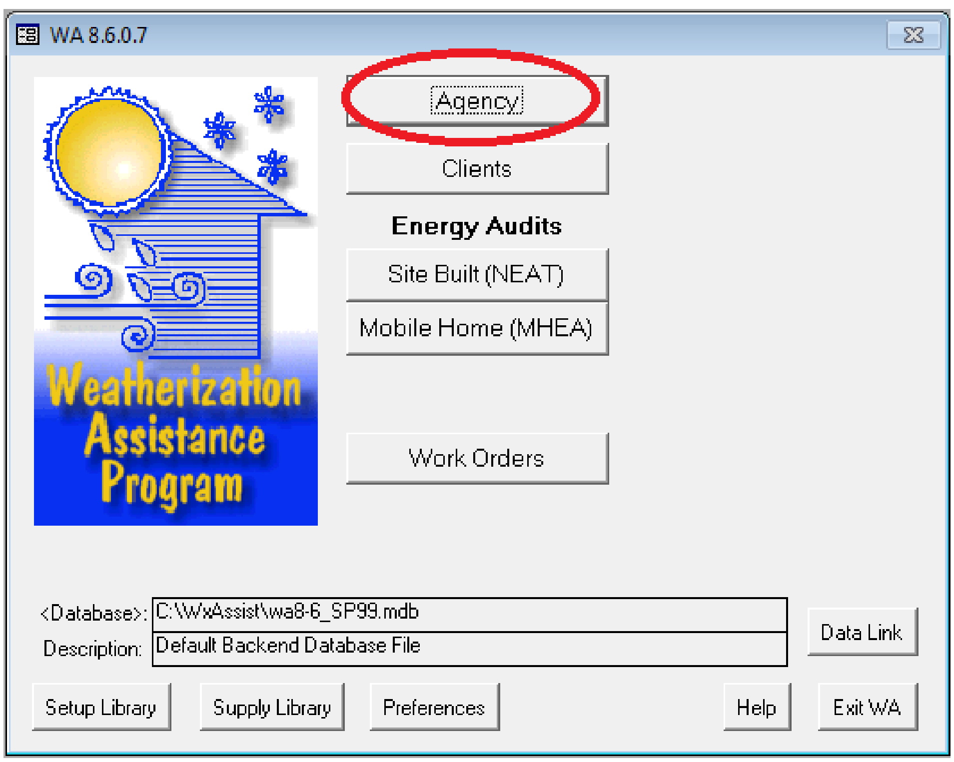
Many service providers have accumulated a large list of client, audit, and work order records in their local Weatherization Assistant (WA) database. Besides including current client records, the database includes records for clients whose weatherization and other work was completed in prior program years. These older records should be archived periodically, so that the WA software will run more quickly, and so that finding client, audit and work order records will be simpler, due to a shorter list of records to search through.

Before starting this process be sure to create a backup copy of the current complete WA backend database file, and rename the backup copy with a recognizable name reflecting the program year or other time period for the data contained in the file. This backup copy will become the archived database that you will be able to re-link to via WA in order to look up older records that have been removed from the current database. This should only be done with the master backend database file that is used at an agency, i.e. archive copies generally shouldn't be made of local backend database files that are on tablet computers, satellite office locations.

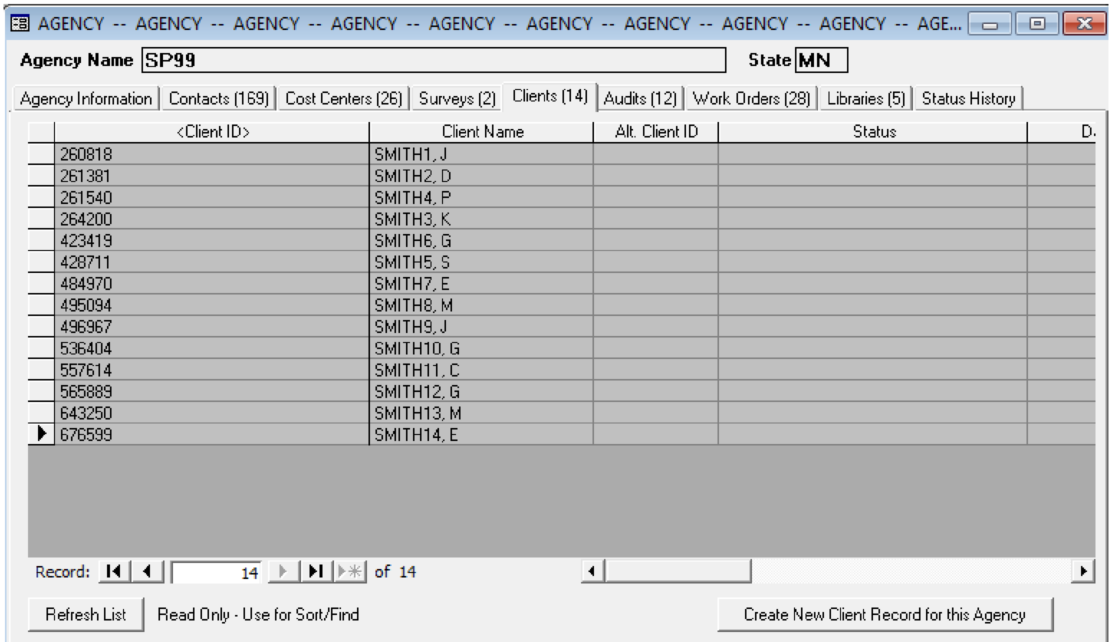
In addition, you should make another backup copy of the current backend database file before following the approach outlined in this document. In the event that you accidentally delete records that you didn't intend to later in the process, you can easily revert to this saved backup file.

Examine Existing Client List

First we'll just look at the client records that are in our example database. Click on the Agency button on the main screen.

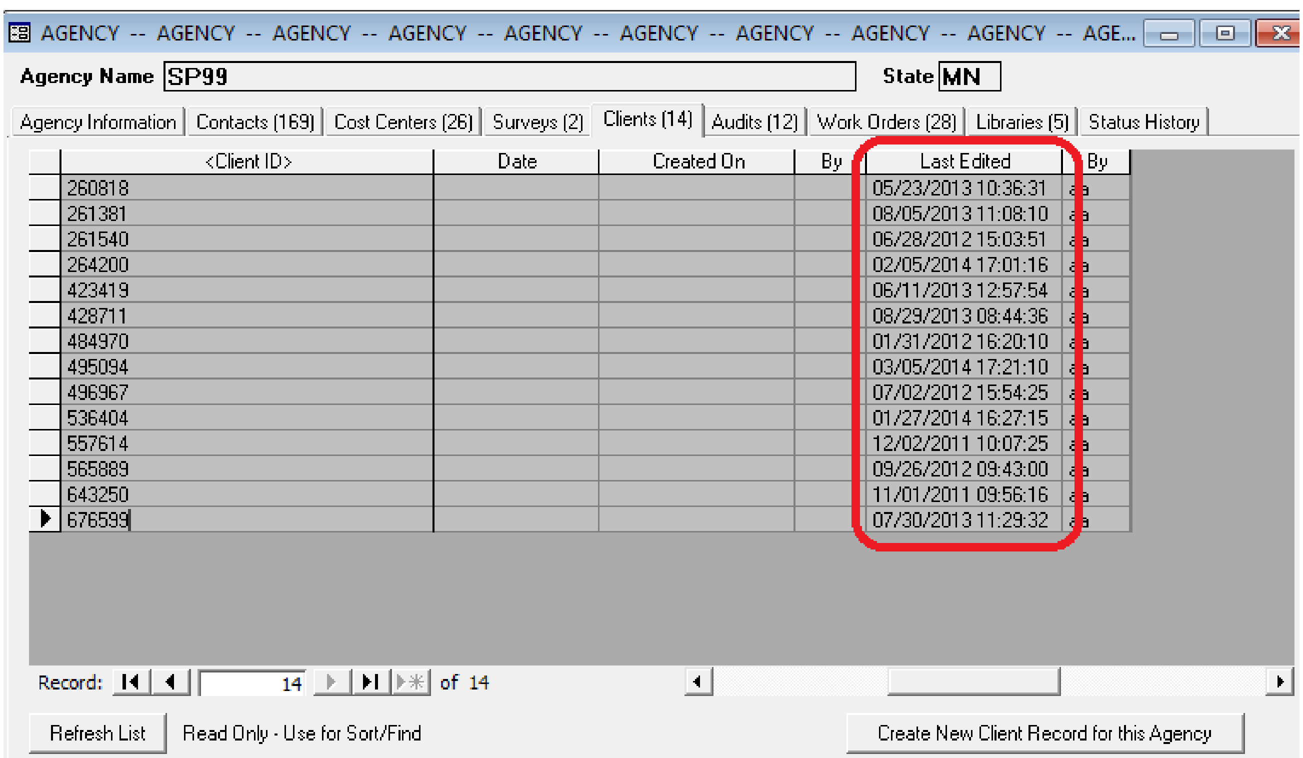


Click on the Clients tab from the Agency screen. You can see that there are 14 client records that are sorted in order of Client ID, by default.



<Client ID>	Client Name	Alt. Client ID	Status	D.
260818	SMITH1, J			
261381	SMITH2, D			
261540	SMITH4, P			
264200	SMITH3, K			
423419	SMITH6, G			
428711	SMITH5, S			
484970	SMITH7, E			
495094	SMITH8, M			
496967	SMITH9, J			
536404	SMITH10, G			
557614	SMITH11, C			
565889	SMITH12, G			
643250	SMITH13, M			
676599	SMITH14, E			

If you scroll to the right you will see that there is a field named ‘Last Edited’ on the far right. Looking at these dates, there are 4 records that were last edited prior to July 1, 2012.



<Client ID>	Date	Created On	By	Last Edited	By
260818				05/23/2013 10:36:31	a
261381				08/05/2013 11:08:10	a
261540				06/28/2012 15:03:51	a
264200				02/05/2014 17:01:16	a
423419				06/11/2013 12:57:54	a
428711				08/29/2013 08:44:36	a
484970				01/31/2012 16:20:10	a
495094				03/05/2014 17:21:10	a
496967				07/02/2012 15:54:25	a
536404				01/27/2014 16:27:15	a
557614				12/02/2011 10:07:25	a
565889				09/26/2012 09:43:00	a
643250				11/01/2011 09:56:16	a
676599				07/30/2013 11:29:32	a

We're not going to delete any records from this screen - these previous steps were described just to show the records that we will be working with subsequently.

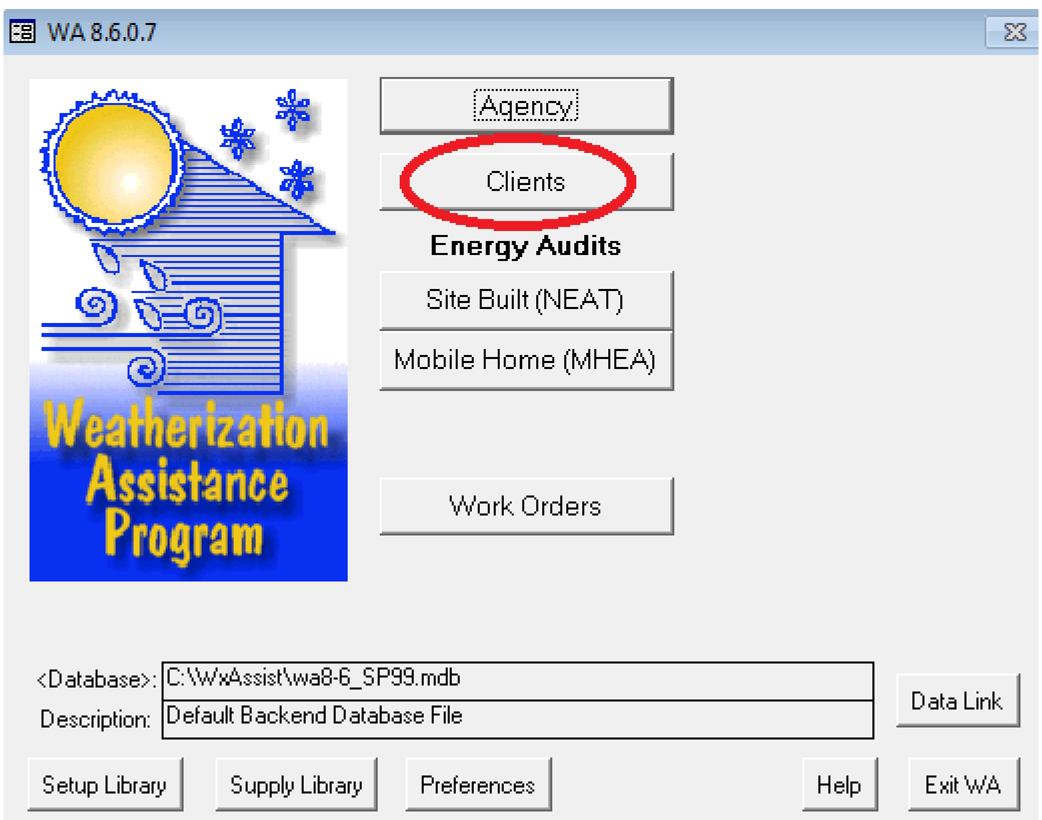
Client Records to be Retained Based on Last Edited Date

In this document we will demonstrate a way of identifying and selecting only the older client records that you want to delete from the current database by using a filter. After those records have been identified they can all be deleted in one step.

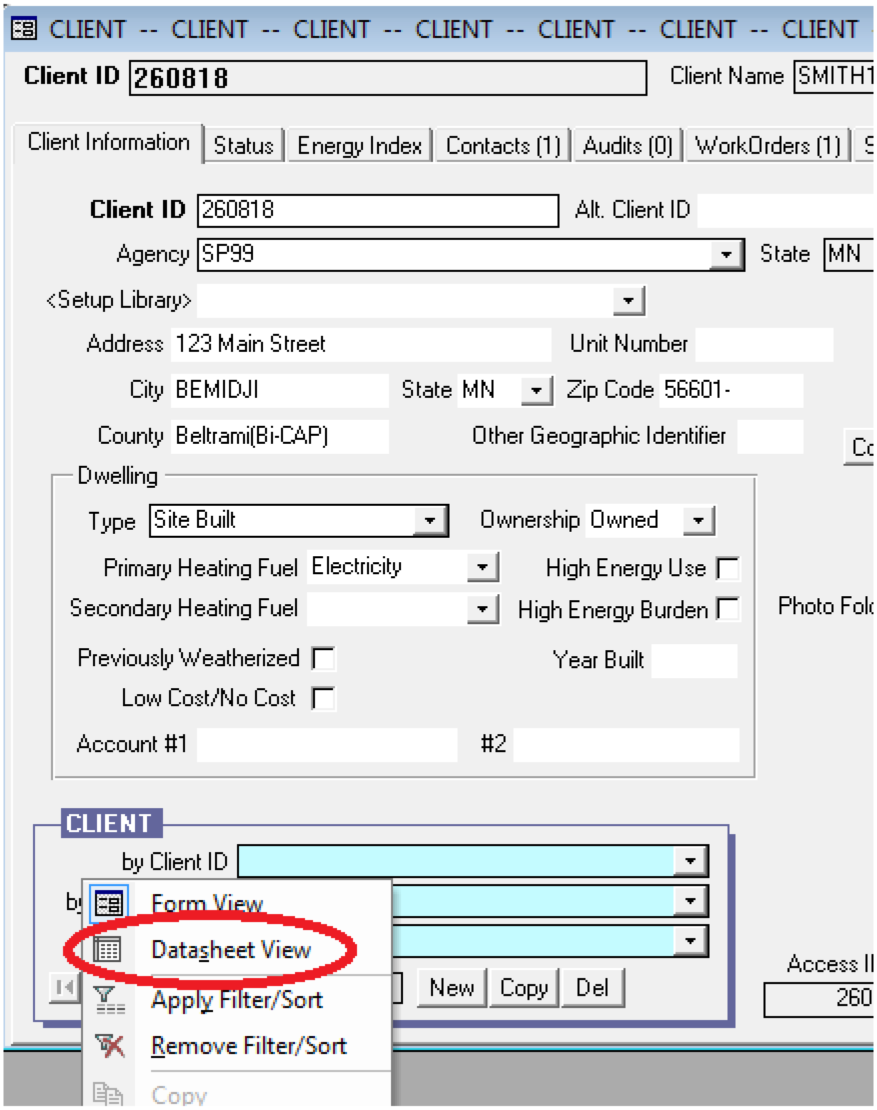
Suppose that you make a decision at your agency that you only want to retain client records in your current backend database that have been edited since July 1, 2012. All of the rest of the client records you want to store in the archived backend database, which can be retrieved later, if needed.

You previously made a backup copy of this database and re-named it with a file name that is recognizable, such as wa8-6ArchivePY11.mdb. That is the archived database that contains a copy of all of the records in the current database. We are not working with that archived copy of the database - rather we are now working with the current backend database file. We're going to delete the older client records from the current database, which will result in fewer records to sort through, and the various database processes should run more quickly.

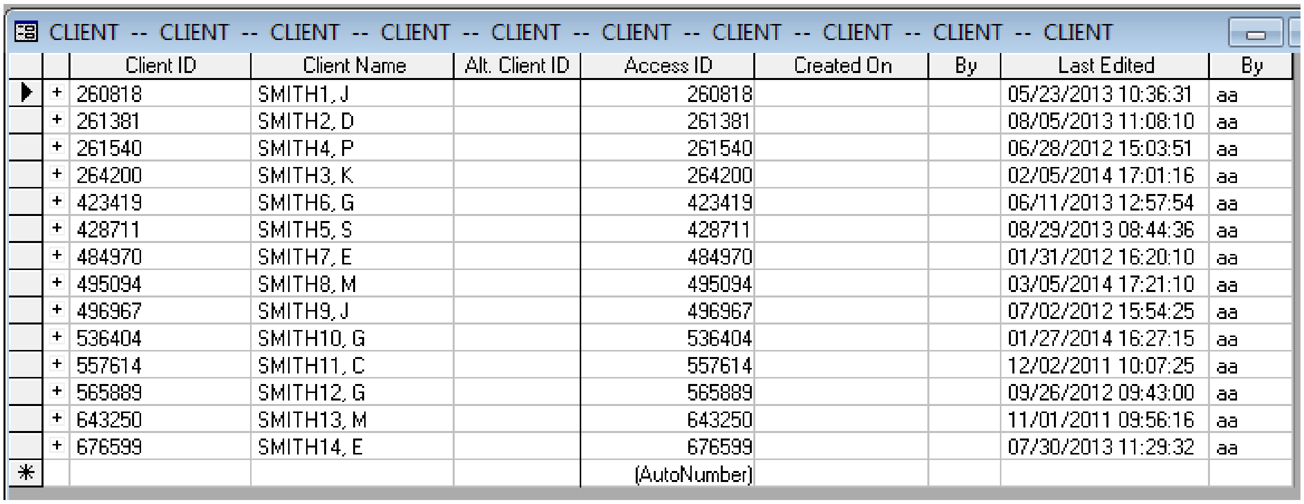
Return to the Main screen and click on the Clients button.



This will take you to the Client screen. With your mouse, right-click in the lower left corner of the Client Info screen, in the area of the Client search functions (area with blue-grey border). Right-clicking with your mouse will show a pop-up dialog with several options. From the list of options select the Datasheet View choice as highlighted in the figure below.



This will show all of the client records in Datasheet View, which looks something like a spreadsheet, as shown in the figure below.



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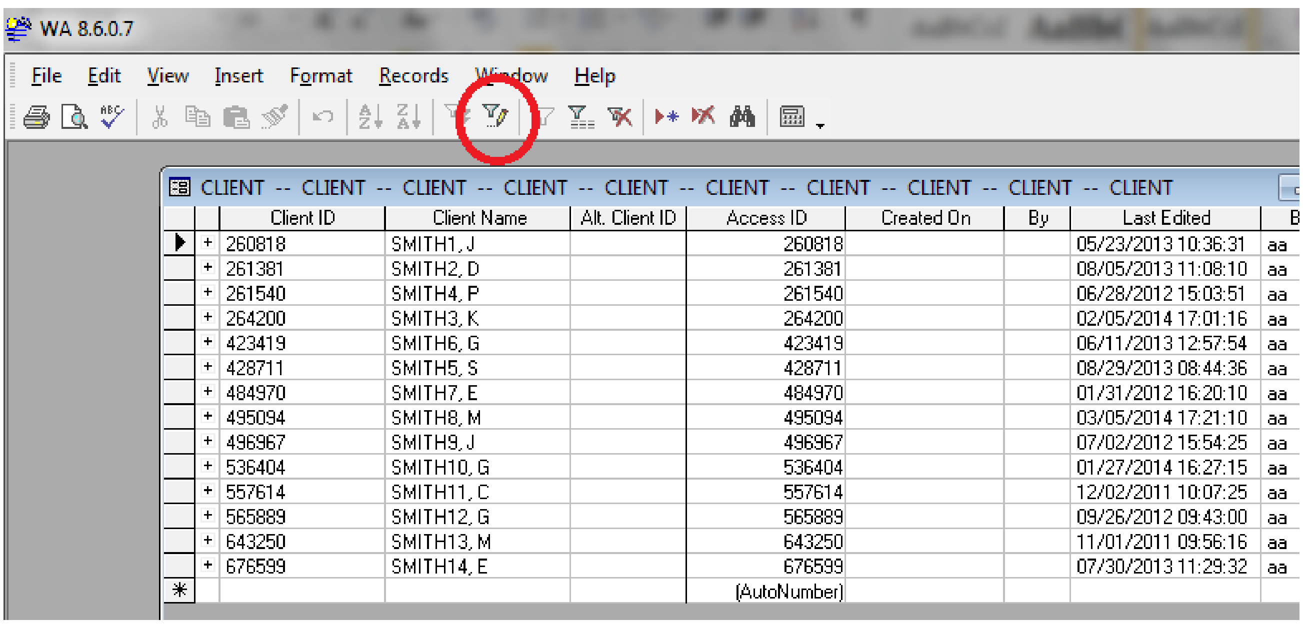
Client ID	Client Name	Alt. Client ID	Access ID	Created On	By	Last Edited	By
260818	SMITH1, J		260818			05/23/2013 10:36:31	aa
261381	SMITH2, D		261381			08/05/2013 11:08:10	aa
261540	SMITH4, P		261540			06/28/2012 15:03:51	aa
264200	SMITH3, K		264200			02/05/2014 17:01:16	aa
423419	SMITH6, G		423419			06/11/2013 12:57:54	aa
428711	SMITH5, S		428711			08/29/2013 08:44:36	aa
484970	SMITH7, E		484970			01/31/2012 16:20:10	aa
495094	SMITH8, M		495094			03/05/2014 17:21:10	aa
496967	SMITH9, J		496967			07/02/2012 15:54:25	aa
536404	SMITH10, G		536404			01/27/2014 16:27:15	aa
557614	SMITH11, C		557614			12/02/2011 10:07:25	aa
565889	SMITH12, G		565889			09/26/2012 09:43:00	aa
643250	SMITH13, M		643250			11/01/2011 09:56:16	aa
676599	SMITH14, E		676599			07/30/2013 11:29:32	aa
			(AutoNumber)				

Filter Records Based on Client LastEdited Date

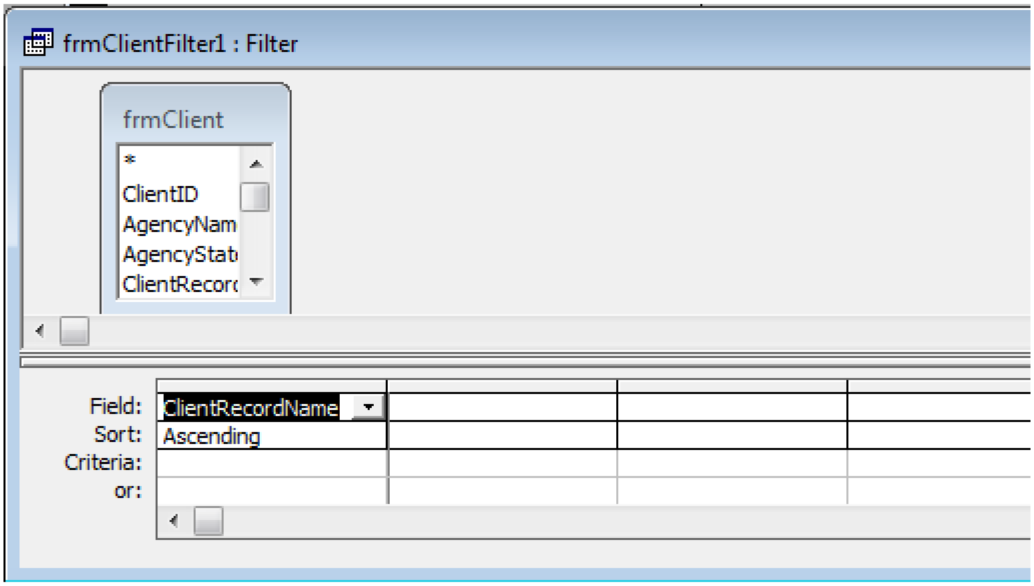
On the toolbar you will see the  symbol, which denotes an Advanced Filter/Sort option.



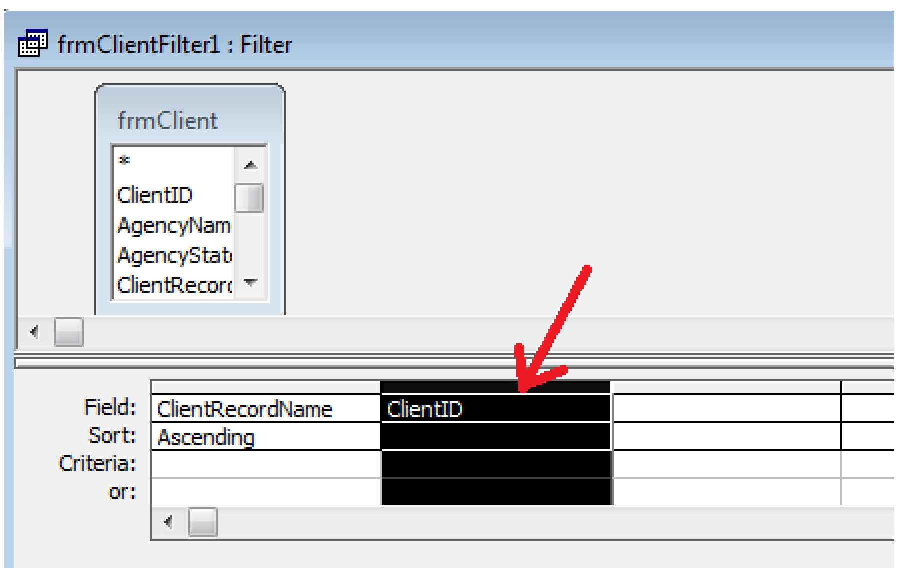
Client ID	Client Name	Alt. Client ID	Access ID	Created On	By	Last Edited	B
260818	SMITH1, J		260818			05/23/2013 10:36:31	aa
261381	SMITH2, D		261381			08/05/2013 11:08:10	aa
261540	SMITH4, P		261540			06/28/2012 15:03:51	aa
264200	SMITH3, K		264200			02/05/2014 17:01:16	aa
423419	SMITH6, G		423419			06/11/2013 12:57:54	aa
428711	SMITH5, S		428711			08/29/2013 08:44:36	aa
484970	SMITH7, E		484970			01/31/2012 16:20:10	aa
495094	SMITH8, M		495094			03/05/2014 17:21:10	aa
496967	SMITH9, J		496967			07/02/2012 15:54:25	aa
536404	SMITH10, G		536404			01/27/2014 16:27:15	aa
557614	SMITH11, C		557614			12/02/2011 10:07:25	aa
565889	SMITH12, G		565889			09/26/2012 09:43:00	aa
643250	SMITH13, M		643250			11/01/2011 09:56:16	aa
676599	SMITH14, E		676599			07/30/2013 11:29:32	aa
			(AutoNumber)				

Click on the Advanced Filter/Sort button to pop up a query screen that will allow you to select a group of records that meet a certain criteria, which in our case will be all client records having a Last Edited Date that is before July 1, 2012. These are the records that we want to delete from the current database, since we decided to only retain the more recent records.

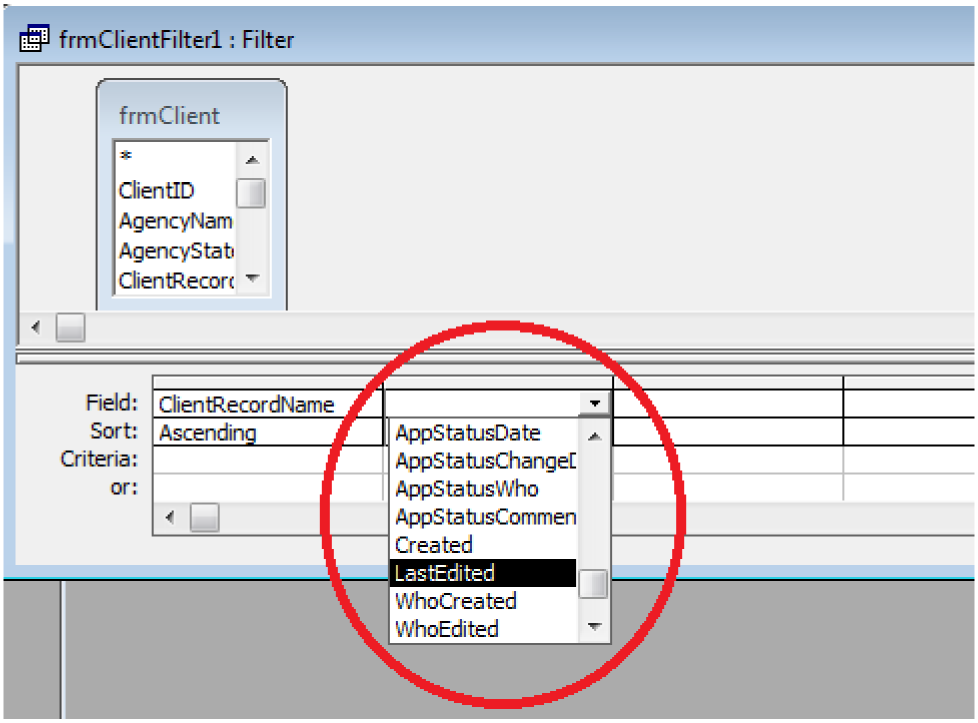
This is what the query screen looks like when it initially pops up. You will edit the fields in the query screen in the following steps.



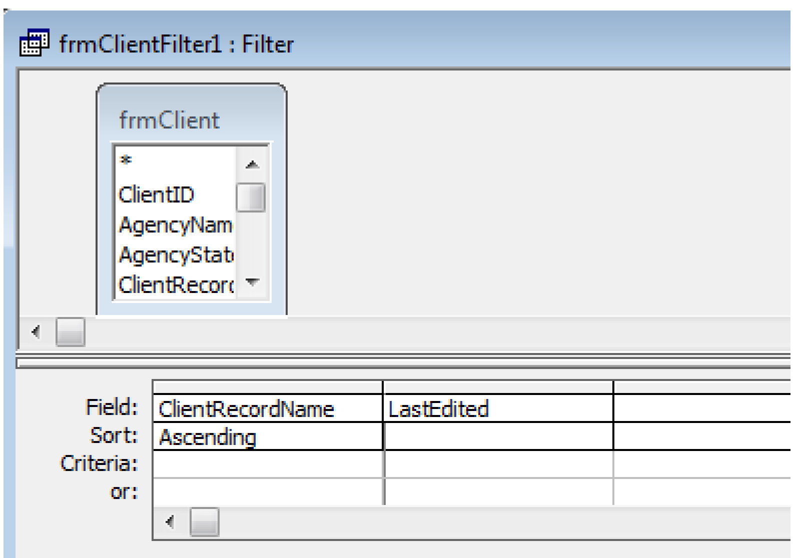
Note: If there is another field shown in addition to ‘ClientRecordName’, such as ‘ClientID’ in the figure below, click with your mouse in the space just above the column text heading “ClientID”, which will highlight the column in black, as shown below. Then press the Delete key on your keyboard, which will delete this column from the query screen.



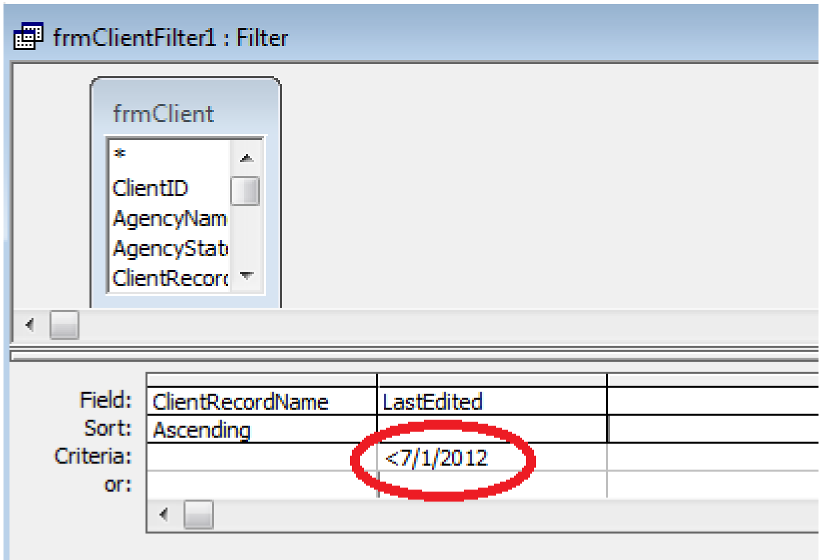
Click in the empty column next to the ‘ClientRecordName’ column and you’ll see an arrow on the right edge of the field, indicating there is a drop-down list available (see the figure below). Click on the arrow to show the drop-down list and scroll down the list until you see the ‘LastEdited’ field. Click on the ‘LastEdited’ field to select it. Don’t confuse this with the field named ‘LocalLastEdited’.



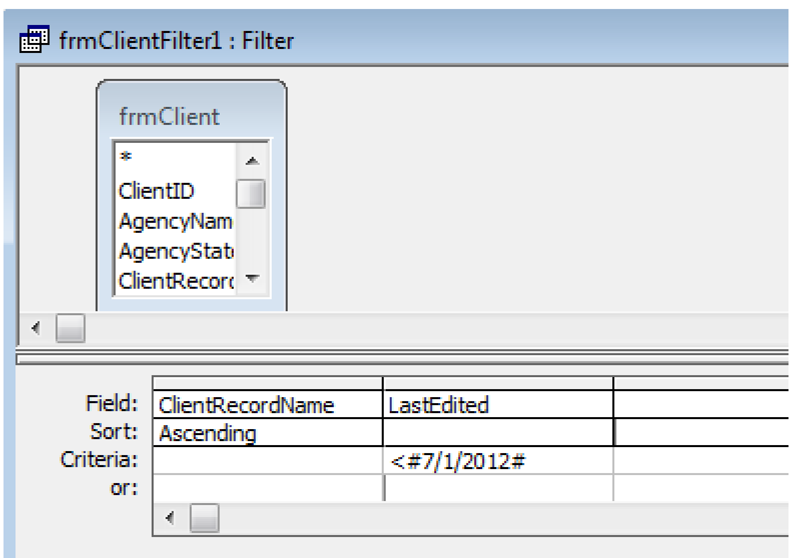
After you click on that field you will see that the 'LastEdited' field has been added to your query screen, as shown below.



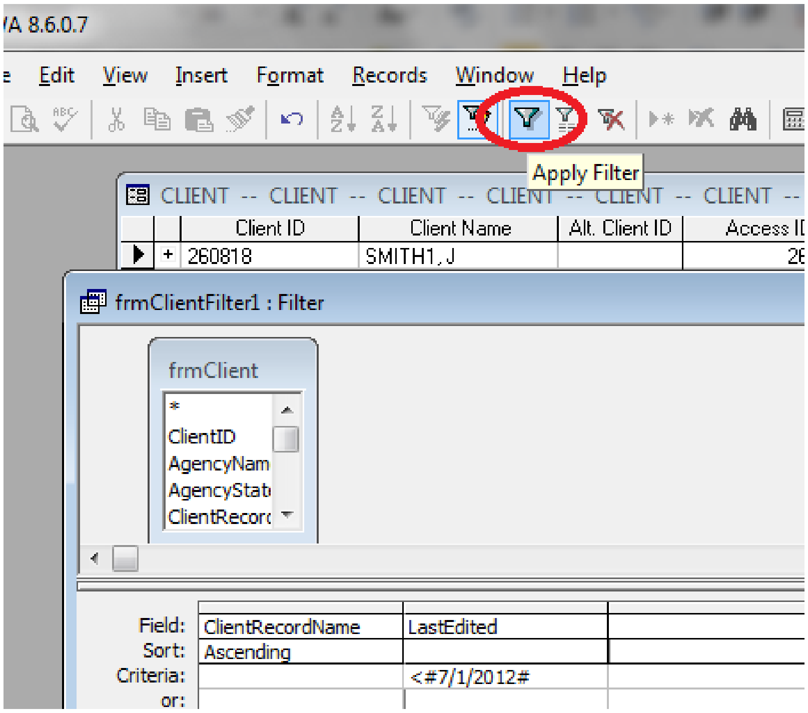
In order to select a set of records to eventually be deleted you first need to set the criteria for the records to be retrieved. This is done by entering a date in the row labeled "Criteria", under the field labeled 'LastEdited'. Since we want to retrieve (and eventually delete) the records that are older than July 1, 2012, we need to enter the criteria "<7/1/2012", which means 'retrieve the client records having a LastEdited date that is less (earlier) than July 1, 2012.



When you click out of the field, the # symbols are added to the criteria (see below), denoting a date.

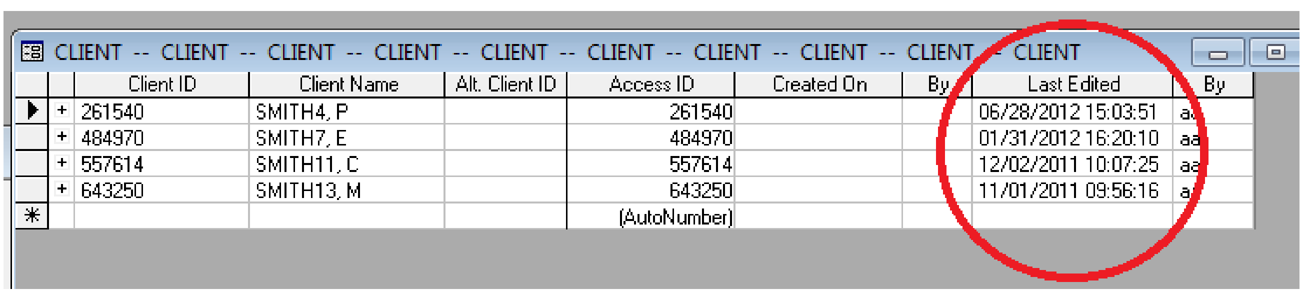


On the toolbar you will see the  symbol, which means Apply Filter. The filter uses the criteria that you set up in the step above to retrieve only the records that meet the criteria.



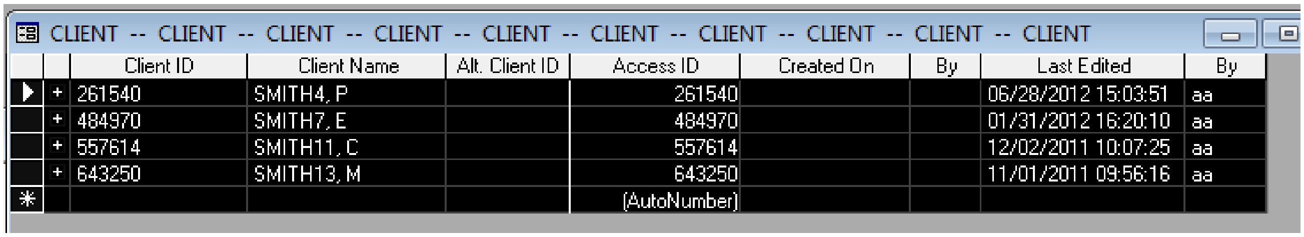
When you click on the Apply Filter symbol on the toolbar, the filter generates a list of the client records that meet the criteria entered above - in this case, only the client records that have a 'LastEdited' date prior to 7/1/2012. The figure below shows the 4 records having 'LastEdited' dates in 2011 and before July 1 in 2012. These are the client records that we want to delete from the current database.

You should scroll through the list of client records, scanning the 'LastEdited' dates, to make sure that the records all meet the criteria that you entered.



Delete the Retrieved (Older) Records

You can highlight all of the client records in the list by either simultaneously pressing the Ctrl key and the letter A key on the keyboard (Ctrl-A), or by dragging the mouse cursor down the far left grey-colored column. All of the client records will be highlighted in black, as shown below.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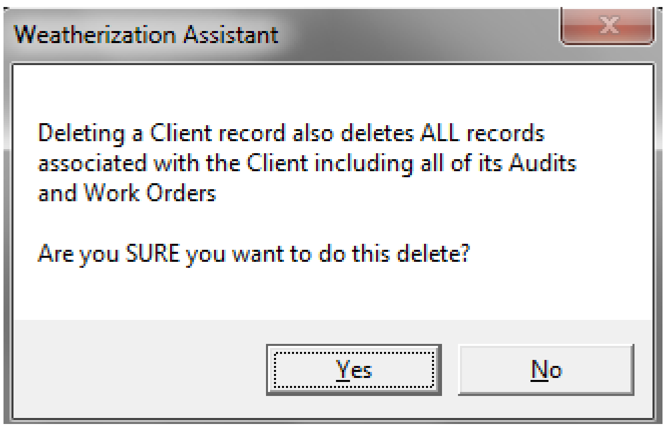
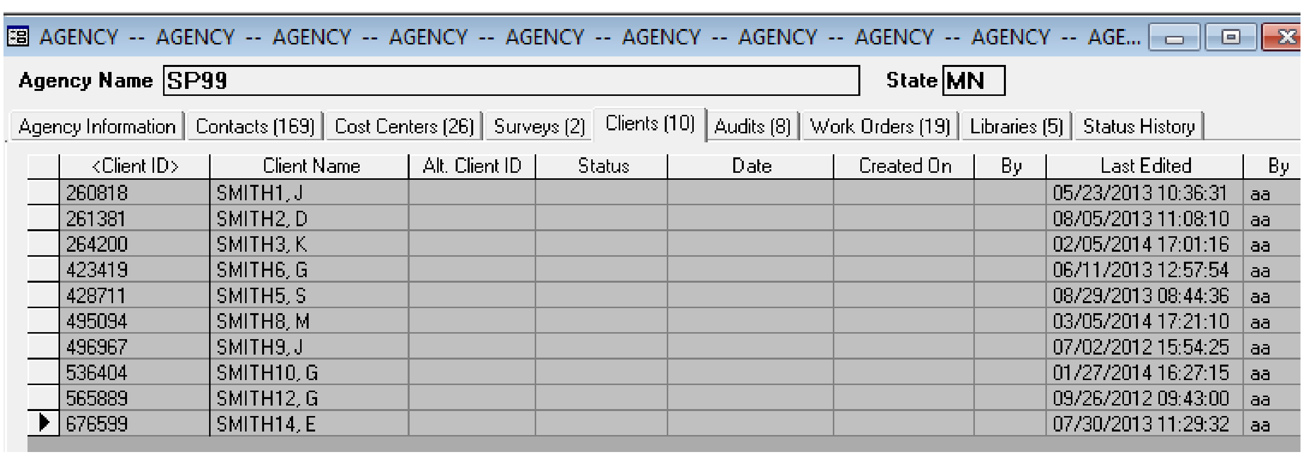
Client ID	Client Name	Alt. Client ID	Access ID	Created On	By	Last Edited	By
261540	SMITH4, P		261540			06/28/2012 15:03:51	aa
484970	SMITH7, E		484970			01/31/2012 16:20:10	aa
557614	SMITH11, C		557614			12/02/2011 10:07:25	aa
643250	SMITH13, M		643250			11/01/2011 09:56:16	aa
			(AutoNumber)				

After all of the records are highlighted, if you press the Delete key on your keyboard, all of the highlighted records will be deleted and you will be returned to the main WA screen. You will generally see a pop-up warning that you are deleting the records – select Yes at the bottom of the warning to delete all of the client records that were highlighted.

It's possible that you may not be shown a warning that the records are being deleted, so you won't have a chance to cancel the operation. This is why you want to make sure that you previously created your archive copy of the database file, and have also created a separate backup copy of the database file, in case you make a mistake and need to retrieve the original data.



If you now go back and look at the Clients tab from the Agency screen, you will see that the only client records remaining are those that have 'LastEdited' dates of 7/1/2012 or later, which is what we intended.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Agency Name SP99 **State** MN

Agency Information | Contacts (169) | Cost Centers (26) | Surveys (2) | Clients (10) | Audits (8) | Work Orders (19) | Libraries (5) | Status History

<Client ID>	Client Name	Alt. Client ID	Status	Date	Created On	By	Last Edited	By
260818	SMITH1, J						05/23/2013 10:36:31	aa
261381	SMITH2, D						08/05/2013 11:08:10	aa
264200	SMITH3, K						02/05/2014 17:01:16	aa
423419	SMITH6, G						06/11/2013 12:57:54	aa
428711	SMITH5, S						08/29/2013 08:44:36	aa
495094	SMITH8, M						03/05/2014 17:21:10	aa
496967	SMITH9, J						07/02/2012 15:54:25	aa
536404	SMITH10, G						01/27/2014 16:27:15	aa
565889	SMITH12, G						09/26/2012 09:43:00	aa
676599	SMITH14, E						07/30/2013 11:29:32	aa

Repair and Compact Current Database

After completing this process you should run the Repair and Compact routine on the backend database, so that the file size will be reduced.