

Extracting Data to Archive

(prior to automatic purge per Certain's Data Retention Policy)

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Introduction

This document explains how to extract historic profile, registration and event data from your Certain account, using custom reports.

See also the [Webinar recording](#) which covers this subject.

Certain's updated [Data Retention Policy](#) explains that from September 15, 2019, Certain will retain attendee profile and registration data for a full three years past the date of the last change.

Our goal is to help you create the best experience for your attendees by providing you with the highest performance from your Event Automation platform.

Parts of this involve Certain automatically removing old profile, registration and event data.

- **Profile** data is deleted for profiles that:
 - were not created or modified in the last three years
 - and do not have any registrations that were created or updated in the last three years.
- **Event** data is deleted for events that:
 - are not marked as templates
 - and have an event end date that is at least three years old.

There are two ways you can extract data before it is purged from your instance of Certain.

1. Using custom reports, as explained in this document and the webinar mentioned above.

(When you are planning a large data extraction — over 10,00 records — we recommend you coordinate with Certain Support.

Please see '**Large Data Sets**' on page 4.)

2. Using Certain Application APIs to build an integration.

See the API 2.0 documentation:

<https://developer.certain.com/api2docs/>

Reports

This is how to use custom reports to extract your data. The process is very similar for Profiles, Registrations, and Events, but they're explained separately below.

In each case, you only need add the report once. You can then use it regularly in the future, changing just the date filter.

Profile Data

1. Go to ☰ > PROFILES > Reports
2. Click **Create Report**
3. Give the report a name. For example, "Profile – Data Extraction"
4. Choose its visibility.
 - a. *Recommended:* "All Accounts".
 - b. That means you can run it in sub-accounts without having to create new reports.
5. Choose a report type:
 - a. Profiles, or
 - b. Profile and Registrations (that is, profiles with their registration history across events).
6. **Save**

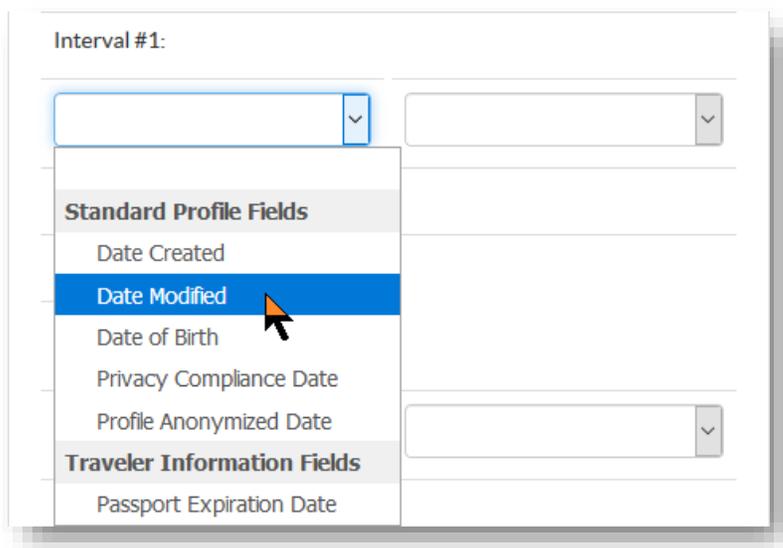
Next, customize the report's columns and filters to extract the data *you* want to retain outside Certain:

Filters

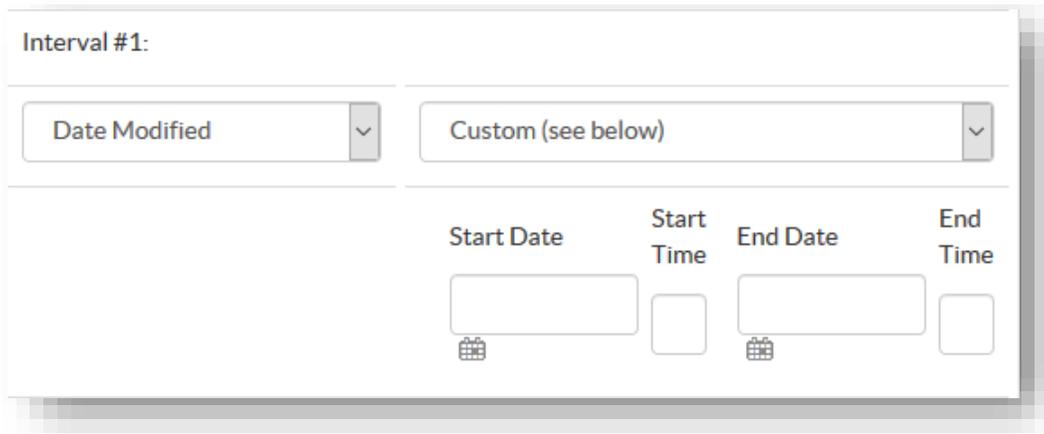
7. Click **Filters** in the Left Navigation Panel.

You want to include only the profiles that haven't been updated in the last three years.

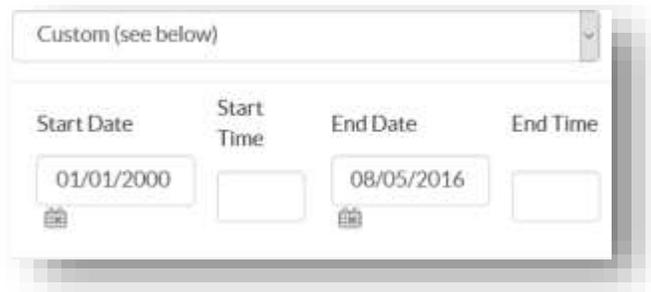
8. **For Interval #1, select Date Modified.**



9. Select “**Custom (see below)**” as the filter. This exposes date fields for you to complete.



10. For the **Start Date**, select the date your organization started using Certain.
(If you don't know when that was, select any early date that would definitely be before that.)
11. Select an **End Date** of three years ago.



12. **Save** and **Run** the report.
13. It lists the people whose profile data hasn't been updated in the last three years.

Columns

14. Click **Columns** in the Left Navigation Panel.
15. A report works best using 15 to 20 fields as your columns.
16. Select the fields for the information that **you** want to extract and add them to the fields to display.
17. **Save** and **Run** the report.
18. Ensure that it includes the records you want, and the information you want for them.
19. If it doesn't, customize the Filters and Columns accordingly.

Export

20. When you're ready, click **Export** at the top of the page.
21. Select a file type, such as 'Excel Spreadsheet'.
22. The system generates the report.

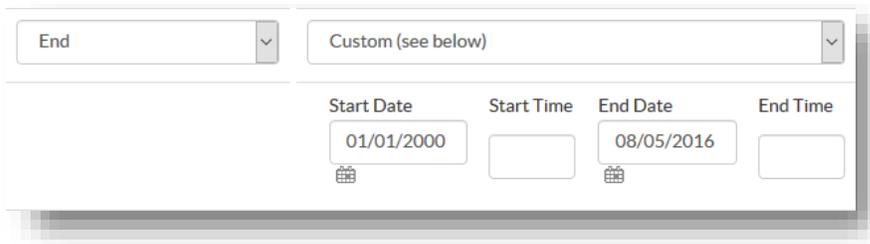
23. You now have that file on your computer.
24. Move or copy it to the appropriate location, probably on your organization's network.

Registration Data

1. To run a report about registrations in all the events in your account, go to **Account > Consolidation**.
2. Most of the steps are the same as for Profile reports, so they are summarized here,
3. Add a report, and name it.
4. Set its visibility to **All Accounts**, so that you won't have to recreate it for sub-accounts.
5. Select the data to report on, such as '**Registrations across events**'.
6. Use 15–20 columns and **Save**. (Again, select the data **you** want to extract to keep outside Certain.)
7. Filter on the **Reg Date Modified**, using the same custom date range as before, and **Save**.
8. Run the report, which will list registrations that have not been updated in that date range.
9. Export the results.

Event Data

1. To run a report about all the events in your account, remain in **Account > Consolidation**.
2. Add a report, and name it.
3. Set its visibility to **All Accounts**, as recommended for the reports above.
4. Select the report type '**Events**'. and **Save**.
5. Filter on the event end date, (**End** under 'Standard Event Fields'), using a custom date range ending with a date three years ago, and **Save**.



Start Date	Start Time	End Date	End Time
01/01/2000		08/05/2016	

6. Use 15–20 columns and **Save**. (Again, select the data **you** want to extract to keep outside Certain.)
7. Run the report, which will list all events that ended in that date range.
8. Export the results.

Large Data Sets

If your data set is large – over 10,000 records – please contact Certain Support:

- to ensure reliable system performance while running huge reports,
- or if you'd like some help extracting your information.