Database Clean-up (Optional)

The following items can be done at ANY time during your Fiscal Year. Before you start your Database Clean-up, please verify that you are on the most recent version of Eclipse. If you see a message on the Work Center Page in Eclipse that states "Eclipse Update Available" you are not on the most current version.

--- Backup your Data files before you begin your cleanup!

- If a full backup is not available at this time, run the 6.1 Eclipsebackup.exe. (Refer to the 2nd page of the Eclipse 6.1 Backup Instructions section of your Eclipse Training Manual for further information). This will create a restore point of data but does not backup the Attachments, Letters, and etc. in the Eclipse folder on the server. A proper backup of all these folders on the server should be verified with your hardware tech to ensure safe storage of this data for future reference.
- This restore point should be renamed after it is created to create a copy that will not be overwritten when the Eclipsebackup.exe is run again in future steps.

--- Delete General Ledger Account History *(Only applicable if using the General Ledger)

- The decision whether or not to delete GL history and for what time frame is up to the agency. This decision should be made before starting the GL history deletion.

Please read the info provided below carefully before proceeding.

- While keeping at least two years of GL history for comparative report totals is necessary, for a complete audit trail, it is strongly recommended a total of seven to ten years be kept in Eclipse.
- This step prints and/or permanently deletes general ledger account history up to a specified date.
- Once general ledger history has been removed, transactions may not be backdated prior to that date. The General Ledger Account Statements should be printed or saved and kept indefinitely for account information and audit trails.
- Once General Ledger Account Statements have been deleted, the history of those GL accounts can no longer be accessed for comparative reporting purposes. If you wish to compare the current fiscal year with your previous fiscal year on your GL Trial Balance, general ledger history for two years should be retained in Eclipse.
- The General Ledger Statements cannot be run for the Remove option until the Daily Report, GL Posted Transaction Report, has been cleared.
- All Eclipse users must be logged off of Eclipse to proceed with the removal of General Ledger History.

To proceed with the deletion of the General Ledger History:

- Click Reports on the Button Bar
  - Report Type = Accounting
  - Report = General Ledger Account Statements Report
  - In the field, Date (MM/YYYY), use the fiscal year-end month for the date history should be deleted thru. This will delete history on all General Ledger accounts in the database with history that has an entered date thru the date specified.***The From and Thru Dates option can only be used when the Report Type is Transcript; it cannot be used for removal of GL history.
  - Report Type = Remove. When you click on Create, this report will automatically be saved for future reference in the Eclipse Report History. ***This history can be found under the Report Type - Accounting under Report History at the bottom of the screen. To see all the saved history for the General Ledger Account Statements Report, highlight the row for the report title and click on Report History.
  - When the report comes up on the screen you may choose to print the information or click Close. ***This report may be very large; printing the report would be at the agency’s discretion. When asked, “Are you sure you are ready to delete these GL Transactions?” Click Yes. The deletion process may take time especially if you are deleting a lot of data.
Delete Customer History

- The decision whether or not to delete customer history and for what time frame is up to the agency and should be decided before starting the customer history deletion process.

Please read the info provided below carefully, before proceeding.
- While keeping at least two years of GL history for comparative report totals is necessary, for a complete audit trail, it is strongly recommended a total of seven to ten years be kept in Eclipse.
- The Customer Transaction History Removal Report deletes the transaction history stored on the Customer Transaction History window for all customers through the date specified.
- Once Customer Transaction History has been deleted, the history of those customer accounts can no longer be accessed for data reporting purposes.
- All reports in Eclipse that access data stored in specific transactional history data on the customer will no longer be accessible.
- All Eclipse users must be logged off of Eclipse to proceed with the removal of Customer Transaction History.

To proceed with the deletion of the Customer Transaction History:
- Click Reports on the Button Bar
  - Report Type = Utilities
  - In the date field enter the date to remove all history through (example mm/dd/yyyy)
  - Verify Customer equals "Y" for all customers. This will delete history on all customers in the database with history that has an entered date thru the date specified.
  - Report Option = Remove. When you click on Create, this report will be automatically saved in the Eclipse Report History. ***This history can be found under the Report Type- Utilities under Report History at the bottom of the screen. To see all the saved history for the Customer Transaction History Report, highlight the row for the report title and click on Report History.
    - When the report comes up on the screen you may choose to print the information or click Close. ***This report may be very large; printing the report would be at the agency’s discretion. When asked, “Are you sure you are ready to clear the history?” Click Yes. The deletion process may take time, especially if you are deleting a lot of data.

Delete History of Bank Statement Data *(Only applicable to agencies using the General Ledger)*

- The decision whether or not to delete Bank Statement history and for what time frame is up to the agency and should be decided before starting the History of Bank Statement deletion process.

Please read the info provided carefully, before proceeding.
- For a complete audit trail, it is strongly recommended a total of seven to ten years be kept in Eclipse.
- The Check/Deposit Deletion Report deletes the check and deposit history stored under History of Bank Statement for all checks and deposits with an effective date LESS than or EQUAL to the date specified.
- Once the Check/Deposit Deletion Report has been run for the ‘Final’ Report Type, the history of those checks and deposits can no longer be accessed for verification purposes.

To proceed with the deletion of the History of Bank Statement:
- Click Reports on the Button Bar
  - Report Type = Checkwriter
  - Report = Check/Deposit Deletion Report
  - Account = All - this will delete bank statement history for all checking accounts.
  - Account specific- this will delete bank statement history for the checking account specified.
  - In the date field enter the date to remove all history through (example mm/dd/yyyy). This date is based on the effective date of the check entered.
- Report Option = Final. When you click on Create, this report will be automatically saved in the Eclipse Report History. ***This history can be found under the Report Type- Checkwriter under Report History at the bottom of the screen. To see all the saved history for the Check/Deposit Deletion Report, highlight the row for the report title and click on Report History.

- When the report comes up on the screen you may choose to print the information or click Close. ***This report may be very large; printing the report would be at the agency’s discretion. When asked, “Are you sure you are ready to clear the history?“ Click Yes. The deletion process may take time, especially if you are deleting a lot of data.

__Backup your Data files before you continue your cleanup!

Because the Eclipse Utility will change or delete large amounts of data from your Eclipse database, make sure you have a valid backup of your Eclipse database and files before proceeding!

A backup created prior to this step should be renamed, to avoid overwriting prior backups.

- If a full backup is not available at this time, run the 6.1 Eclipsebackup.exe. (Refer to the 2nd page of the Eclipse 6.1 Backup Instructions section of your Eclipse Training Manual for further information). **Note:** This will create a restore point of data but does not backup the Attachments, Letters, and etc. in the Eclipse folder on the server. A proper backup of all these folders on the server should be verified with your hardware tech to ensure safe storage of this data for future reference. ***This backup should be renamed after it is created to create a backup that will not be overwritten when the Eclipsebackup.exe is run again in future steps.

---

**Eclipse Utility 6.1**

The Eclipse Utility provides the ability to delete dead customers (customers with no history, policies, etc.), prospects, cancelled policies, policy history, ACORD® Forms (with or without Certificates) and old claims. Once any of this data is deleted it can no longer be accessed for data reporting purposes.

Please read the info provided below carefully before proceeding.

- All users must be logged off of Eclipse to proceed with the Eclipse Utility.
- Any user attempting this utility must have proper security to login in.
- This utility cannot be run for individual agencies and will run for ALL agencies if running multi-agency within Eclipse.
- When you have made your selections, you can choose single or multiple items to process, confirm that your choices are accurate and then click on the Process Selected Items button.
- Eclipse will prompt you with a Warning message, “Do you have a good backup?” If your response is “No” we suggest you click No, close out of the utility, run your backup and proceed with running the utility after the backup is complete. If you have a good backup, Click Yes.
- When the utility has completed processing, the Eclipse System Utility window will open to show “Processing Complete”, Click OK. A File Maintenance Report will be generated and shows a listing of the items that have been deleted from your Eclipse database. These reports will be saved automatically in Report History in Eclipse. ***This history can be found under the Report Type - All Reports, under Report History at the bottom of the screen.
- If no actual deletions have been done, the message “Deletions are complete, no report will be generated” will appear. Click OK to close out of this window.
To proceed with the Eclipse Utility:

- Click your Windows Start button
- Select All Programs - Eclipse 6.1 Folder - Eclipse Utility 6.1
- When the Eclipse System Utilities window opens, log in with your Eclipse username and password and Click OK.
- Click the File Maintenance button.
- When Prompted “This option MAY take 60 minutes or more to complete, depending on database size and network speed. Do you want to continue?” Click Yes.
- Detailed explanations of the options are listed below.

---

**Delete Policy Images**

- This option will delete Policy Images listed LESS than or EQUAL to the date specified for deletion.
- If there is only one image on the policy, that image will not be deleted, even if it meets the date selected for the deletion date. This will leave one policy image PRIOR to the date selected for deletion.

**To Proceed:**

- Place a checkmark in the “Delete Policy Images” box and enter in a deletion date.
- Click “Process Selected Items” to delete Policy Images specified by the date.
- If there were deletions to process, no report will be generated after deletions are complete. A message will be generated that says “Processing Complete, no report will be generated”, Click OK.
- If there was no data to delete, a message will state that “No cleanup was done/needed with the options selected” Click OK. “Processing Complete!” Click OK.
Delete Cancelled, Inactive, and Non-Renewed Policies

- If the policy has documentation and/or reminders it will not be deleted, even if it meets the date requirements listed below.
- A new policy that has not yet been activated by billing is inactive and would be deleted in this process.
- Cancelled policies must have a cancellation date LESS than or EQUAL to the date specified for deletion.
- Inactive and Non-renewed policies must have an expiration date LESS than or EQUAL to the date specified for deletion.

To Proceed:
- Place a checkmark in the “Delete Cancelled, Inactive, Non-renewed Policies” box and enter a deletion date.
- Clicking “Process Selected Items” will delete all policies marked as Cancelled, Inactive or Non-Renewed having an effective date LESS than or EQUAL to the date specified for deletion.
- If there were deletions to process, a report will be generated after deletions are complete that lists the Cancelled, Inactive and Non-Renewed policies that were deleted. A message that says “Processing Complete!” will show, Click OK.
- If there was no data to delete, you will get a message that says “No cleanup was done/needed with the options selected” Click OK, then “Processing Complete!” Click OK.
- These reports will be saved automatically in Report History in Eclipse. ***This history can be found under the Report Type- All Reports, under Report History at the bottom of the screen.

Delete ACORD® Forms

- This option will delete ACORD® Forms that have an entered date LESS than or EQUAL to the date specified for deletion.
- It is suggested to verify you have a good backup of your ACORD Forms directory before proceeding, as this process deletes the actual ACORD® forms from the ACORD Form directory as well as the links in the database.
- The default selection does NOT include the deletion of ACORD25 – Certificates of Insurance, as by law, must be kept for 10 years. By placing a checkmark in, “Include Certificates for Deletion”, certificates will also be deleted.

To Proceed:
- Place a checkmark in the “Delete ACORD® Forms” box and enter a deletion date.
- If you place a checkmark in the “Include Certificates for Deletion”, certificates will also be deleted.
- Click “Process Selected Items” to delete ACORD® Forms LESS than or EQUAL to the date specified for deletion.
- If there were deletions to process, no report will be generated after deletions are complete. A message will show that says “Processing Complete, no report will be generated”, Click OK.
- If there was no data to delete, you will get a message that says “No cleanup was done/needed with the options selected” Click OK. “Processing Complete!” Click OK.
- These reports will be saved automatically in Report History in Eclipse. ***This history can be found under the Report Type- All Reports, under Report History at the bottom of the screen.
**Delete Claims**

- This option deletes claims that have a “Settled Date” on the claim that is LESS than or EQUAL to the date specified for deletion. It also allows for claims that meet the criteria to be deleted that have documentation and/or reminders attached.

**To Proceed:**
- Place a checkmark in the boxes that apply to how you want to process your selection. More than one selection may apply.
  - Delete W/O Docs or Reminders = If you want to delete Claims without any Documentation and/or Reminders attached.
  - Delete W/Docs = If you want to delete Claims that have Documentation attached.
  - Delete W/Reminders = If you want to delete Claims that have Reminders attached.
- Click “Process Selected Items” to delete all claims that have a status of ‘Closed’ thru the date you entered.
- If there were deletions to process, a report will be generated after deletions are complete that lists the claims that were deleted.
- A message that says “Processing Complete!” will show, Click OK.
- If there was no data to delete you will get a message that says “No cleanup was done/needed with the options selected” Click OK, then “Processing Complete!” Click OK.
- These reports will be saved automatically in Report History in Eclipse. ***This history can be found under the Report Type- All Reports, under Report History at the bottom of the screen.

**Delete Prospects**

- This will search the database for entries that have been marked ‘Prospect’ that have no claims, history, policies, ACORD® forms, accounts receivable balance or certificates templates.
- This option deletes Prospects that have a “Date Opened” on the prospect that is LESS than or EQUAL to the date specified for deletion.

**To Proceed:**
- Place a checkmark in the boxes that apply to how you want to process your selection. More than one selection may apply.
  - Delete W/O Docs or Reminders = If you want to delete Prospects without any Documentation and/or Reminders attached.
  - Delete W/Docs = If you want to delete Prospects that have Documentation attached.
  - Delete W/Reminders = If you want to delete Prospects that have Reminders attached.
- Clicking “Process Selected Items” will delete these entries.
- If there were deletions to process, a report will be generated after deletions are complete that lists the Prospects that were deleted.
- A message that says “Processing Complete!” will show, Click OK.
- If there was no data to delete you will get a message that says “No cleanup was done/needed with the options selected” Click OK, then “Processing Complete!” Click OK.
- A report that shows all the Prospects that were deleted will be saved automatically in Report History in Eclipse. ***This history can be found under the Report Type- All Reports, under Report History at the bottom of the screen.
Delete Dead Customers

- This will search the database for customers that have no claims, history, policies, ACORD® forms, accounts receivable balances or certificate templates.
- Customers will not delete if they have either documentation or reminders, BUT you can decide to delete documentation and reminders on ‘dead-filed’ customers.

To Proceed:

- Place a checkmark in the boxes that apply to how to process your selection. More than one selection may apply.
  - Delete W/O Docs or Reminders = If you want to delete dead customers without any Documentation and/or Reminders attached.
  - Delete W/Docs = If you want to delete dead customers that have any Documentation attached.
  - Delete W/Reminders = If you want to delete dead customers that have any Reminders attached.
- Clicking “Process Selected Items” will delete any customers that meet the criteria selected.
- If there were deletions to process, a report will be generated after deletions are complete that lists the Dead Customers that were deleted.
- A message that says “Processing Complete!” will show, Click OK.
- If there was no data to delete you will get a message that says “No cleanup was done/needed with the options selected” Click OK, then “Processing Complete!” Click OK.
- A report that shows all the Dead Customers that were deleted will be saved automatically in Report History in Eclipse. ***This history can be found under the Report Type- All Reports, under Report History at the bottom of the screen.

- When done with all the processing, Click Close in the File Maintenance window.
- Click Close from the Eclipse Menu to exit the Eclipse Utility. ***Users in Eclipse will not be able to log into Eclipse until the Eclipse Utility has been exited.