Solix EDMS Data Assessment (ILM Assessment) Standard Edition (SE) 2.2

Quick Reference

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1 Data Assessment (ILM Assessment)

Solix EDMS Database Assessment Standard Edition (SE) plays a significant role to assess the amount of archive eligible data in a given database based on business criteria and provide the snapshot of data distributed in schemas, database size and helps in identifying the Top N tables based on the table size. Solix EDMS Database Assessment Standard Edition (SE) provides the flexibility to perform object-wise and table-wise data assessment to identify the archive eligible data available in the database based on the business compliances and retention policies. There is also a provision to depict the number of rows and data size of archive eligible data in a graphical representation.

Solix EDMS Data Assessment (ILM Assessment) Standard Edition (SE) uses retention management to assess the archive eligible data based on the retention policy. Once retention policy is assigned to the data assessment, the data found within the given retention period before the specified retention date will be assessed for the archive eligibility.

Database Assessment also provides the flexibility to assess the data growth at both tables and database level based on the statistical analysis and forecast the prediction of future growth in both the table size and database growth size in graphical representation. It also analysis data growth yearly and provides the statistics analysis of data growth through graphical representation in dashboard.

There are four types of data assessments, they are:

1. ***Database Size Snapshot***: Assess the data distributed in schemas, database size and size of Top N tables.
2. ***Archive Eligibility:*** Object-wise and table-wise data assessment to assess the archive eligible data.
    - ***Table Level Archive Eligibility***: Table - level data assessment to assess the archive eligible data in the tables based on the simple criteria or applying retention policies.
    - ***Object Level Archive Eligibility:*** Object - level data assessment to assess the archive eligible data by defining a set of related tables, relations, joins, complex business criteria and applying retention policies.
3. ***Data Growth Forecast***: Analysis the data growth at table level and database level that helps to forecast the future database growth. Data growth forecast is predicted based on the some statistical regression methods that help to forecast the future data growth analysis. Data growth analysis is categorized into two types, they are:
    - ***Table Level Forecast:*** To analysis the data growth based on selected tables and forecast the future growth of tables in size.
    - ***Database Level Forecast****:* To analysis the data growth of database based on top tables and forecast the future database growth. Database Level forecast is categorized into two types, they are:

- ***Database Forecast:*** Database growth forecast based on the recent assessment for default data source. Make sure that atleast once the database size snapshot must be executed to forecast the database growth.
- ***Database Growth Analysis on Top Tables:*** Database growth forecast analysis based on top N tables' growth.

4. ***Assessment Summary:*** Assessment Summary provides the consolidated summary of all the data assessments executed on the database. It shows the graphical representation and grid tables that provide the consolidated information of database snapshot, archive eligible data, and database growth analysis. It also provides the flexibility to select the retention policy (i.e., duration) data analyzing the database growth with archived and without archived.

- Current version of Solix EDMS Database Assessment Standard Edition (SE) supports Oracle Database (9i, 10g, and 11g) and SQL Server (2005 and 2008).
- We recommend the data assessment to be executed on recent clones of production database or production database for better output and prediction of future database growth.
- In Data Growth Forecast, some statistical regression method is performed based on the current data in the database. The database growth forecasted is an assumption so it may vary according to the business conditions.

1.1 Features of Solix EDMS Data Assessment (ILM Assessment) Standard Edition (SE)

- Identify the archive eligible data existing in the database (schema) based on the complex business rules.
- Identify the archive eligible data in the top tables by applying retention policies or simple criteria.
- Statistical analysis of data growth helps to forecast the data growth in both database size and table size in future.
- Identify data distribution among the schemas in a database.
- Identify Top N tables based on the table size.
- Identify the archive eligible data based on business compliance.
- Identify the archive eligible data as per eligible rows and eligible data size.

  - *Eligible data* - Inactive data (historical data and eligible for archiving)
  - *Non-eligible data* - Active data (Live data not eligible for archiving)

- Depict the active and inactive data summary of recently executed data assessments in a dashboard
- Identifies and forecast the database growth on the selected top tables.
- Dashboard shows the statistics analysis of business data growth based on the database/application level.
- Provides the consolidated summary of data assessment on the database in the graphical representation that provides the snapshot of database size, archive eligible data in the database, database growth in size and records, and data growth based on the top tables based on the retention policies.
  - Based on the retention policy selected, the graphical representation shows the archived data growth and non-archived data growth in the database. It helps to understand the database growth with archived and without archived.

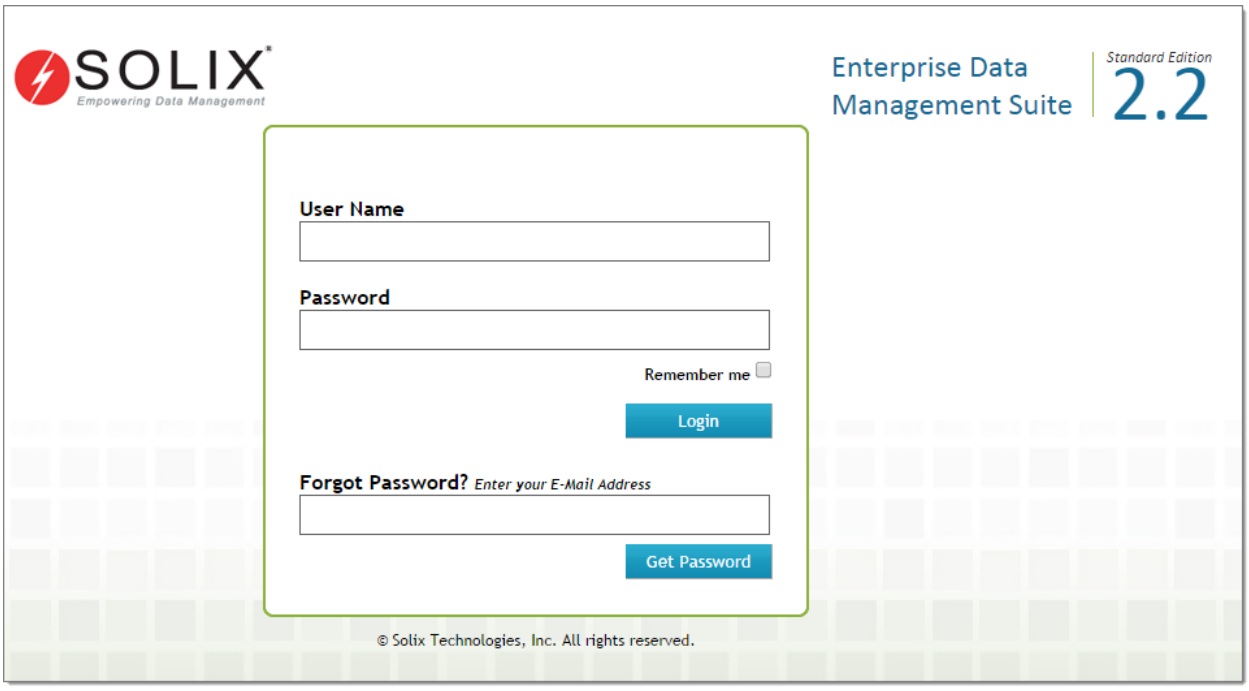
1.2 Benefits of Solix EDMS Data Assessment (ILM Assessment) Standard Edition (SE)

- Identify the eligible data to be archived in the database.
- Graphical representation of data assessment output helps to determine the number of archive eligible data in both database and tables.
- Analysis the yearly data growth in an enterprise.
- Understand and analyze the data growth of business at database level and table level both for next 5 years by graphical representation.
- Helps to execute data assessment based on the retention policy and simple criteria.
- Provide the detailed analytics by rows and size.
- Helps to understand the future data growth in database and table in size for the next 5 years and helps to understand the strategy to archive the data timely for improving the data storage management.
- Provide the flexibility to export the graphical representation of data assessment output into .pdf format.

- Current version of Solix EDMS Database Assessment Standard Edition (SE) supports Oracle Database (9i, 10g, and 11g) and SQL Server (2005 and 2008).

2 Getting Started

In order to access Solix EDMS Standard Edition (SE), enter the respective URL = http://<ip address>:9090/edms/ in the address bar. The ***Login*** screen for initiating the authentication process will be displayed as shown in the figure below:



To login to the application, enter the authenticated user name and password provided by the Solix Delivery team.

For example,

User Name**:** ***ADMIN***

Password**:** ***ADMIN***

1. Click ***Login*** to access ***Solix EDMS(Standard Edition)***
2. On successful login, the Solix EDMS Standard Edition (SE) home screen appears as shown in the figure below.

- Username and password are case sensitive.
- Based on the privileges authenticated to the login user, authorized features will be populated in the home screen respectively.

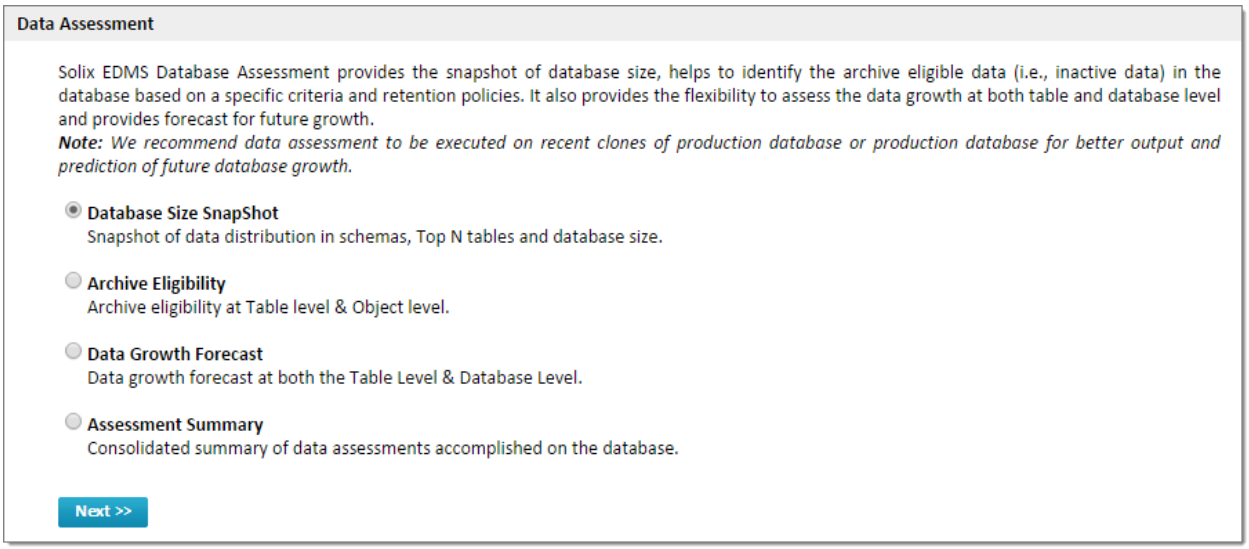
3 Data Assessment Process using Wizard

Solix EDMS Data Assessment Standard Edition (SE) Wizard is designed to provide an intuitive user friendly environment. The user is led through a step-by-step process to perform all the activities required to accomplish the Data assessment efficiently.

This section outlines the procedure to perform four types of Data assessment that differs at procedural level.

To initiate the Data assessment,

- In Solix EDMS Standard Edition (SE) home page, click ***Launch Data Assessment Wizard*** button in the Data Assessment section or Navigate to the ***Data Assessment >> Launch Data Assessment Wizard.*** By default, the ***Data Assessment*** initial screen will be displayed which shows the four type of Data assessment that can be carried out through wizard.



Data Assessment screen provides feasibility to opt for the required assessment type of data assessment to be carried out in the Data assessment successfully.

The four assessment types shown in the wizard are given below.

- Database Size Snapshot
- Archive Eligibility
  - Table Level Archive Eligibility
  - Object Level Archive Eligibility
- Data Growth Forecast
  - Table Level Forecast
  - Database Level Forecast
- Assessment Summary

3.1 Database Size Snapshot

Database Size Snapshot shows a graphical presentation that enables to understand the current database size and space distribution among schemas in the database by providing the snapshot of database size. Database Size Snapshot helps to identify the data distributed among different schemas in the database, space occupied by the each schema, identify the top tables based on the table size that occupied more space in the database.

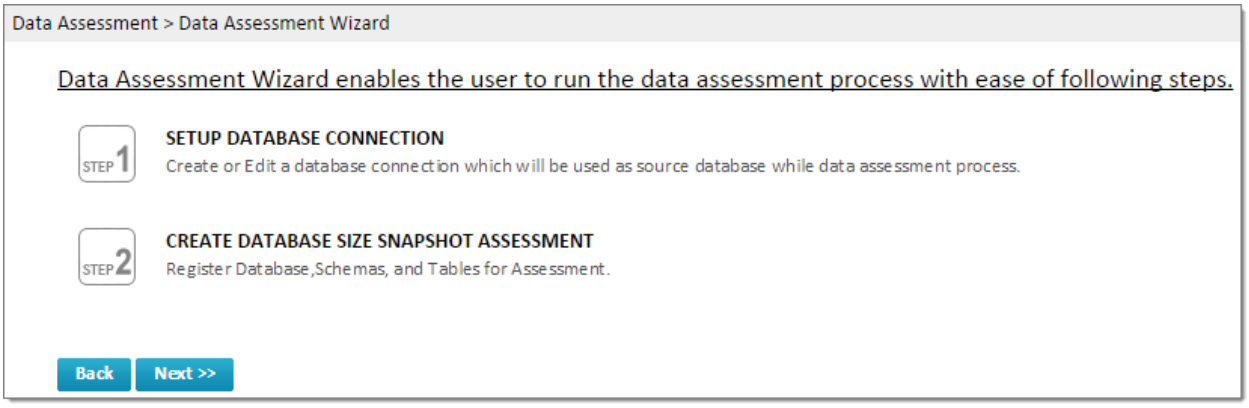
Benefits of Database Size Snapshot:

- Helps to identify the top N tables in the database.
- Ease to view the schema that contains major growth size in the database by identifying the schema which has occupied more space in the database.

Data Assessment for Database Size Snapshot

Once ***Database Size Snapshot*** is selected in the ***Data Assessment*** screen, by default, the ***Data Assessment Wizard*** initial screen will display that shows the summary of each step designed to accomplish the Data assessment successfully.

This section outlines the procedure to setup a connection, and then create data assessment for the database size snapshots.



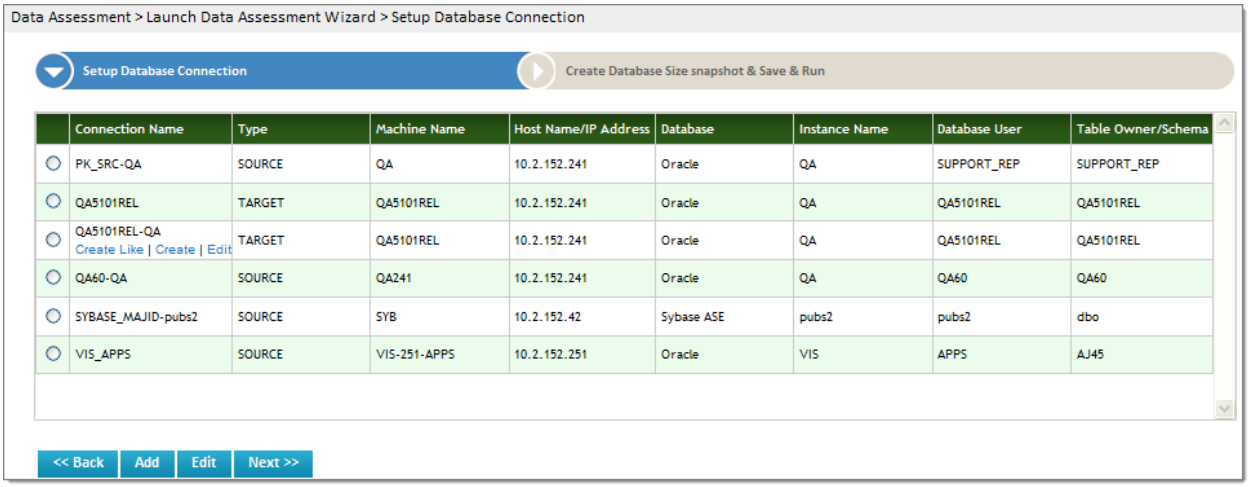
Solix EDMS Data Assessment Standard Edition (SE) Wizard provides feasibility to identify the eligible archive data according to the data distributed in the database with ease of two steps given below.

1. Setup Database Connection
2. Create Database Size Snapshot Assessment

To initiate the Data assessment and navigate to the first step in the wizard, click ***Next*** button.

3.1.1 Setup Database Connection

The user needs to configure the database connection to establish the connectivity to the database in to perform the Data assessment. This section describes the process to configure the connection details in order to connect to the database.

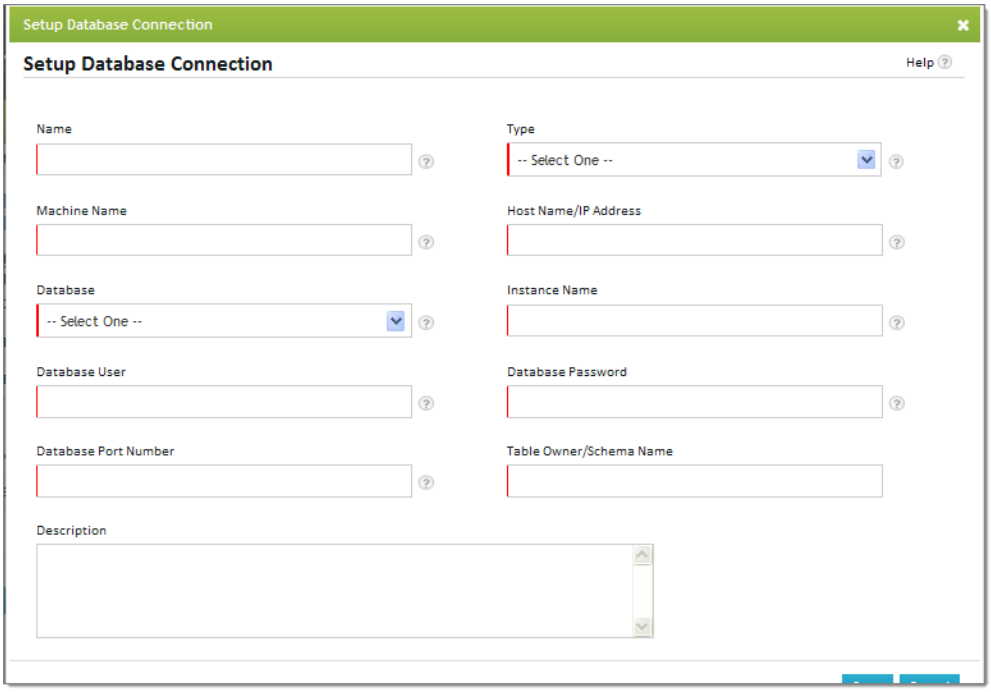


To setup the database connection for data assessment, do the following:

1. In ***Data Assessment Wizard*** initial screen, click ***Next*** button. By default, the ***Setup Database Connection*** screen with the list of existing database connections will display and enables to create or create a replica of connection or edit connections.
   - If the required database connection already exists, then the user can navigate to the next step by selecting the required database connection and click ***Next*** button.

2. To create a new database connection, do the following:
   a. Click ***Add*** button (or) Hover on any existing database connection, the three links (Create Like, New and Edit) will appear to create or edit the database connection.
      - ***Create Like*** – enables the user to create a replica of the selected database connection. The same connections details are maintained. It is recommended to define a new name for the replica.
      - ***Create*** - enables the user to create a new database connection.
      - ***Edit*** **-** enables the user to edit the details of an existing database connection.

   b. The ***Setup Database Connection*** popup window is displayed. A new database connection can be created here as shown in the figure below.



i. Enter the name of the database connection in the ***Name*** text field.

ii. Select an appropriate datasource type from the ***Type*** drop down list and designate the database as a source or target.

iii. Enter the database server name associated to the data source in the ***Machine Name*** text field.

iv. Enter the host name/ IP address associated to the database server in the ***Host Name/ IP Address*** text field.

v. Select the database which is compatible to the data source from the ***Database*** (such as Oracle, Demo database) drop down list.

vi. Enter the instance name/service name of the database in the ***Instance Name*** text field.

vii. Enter the login user name of the database in ***Database User*** text field.

viii. Enter the password corresponding to the username of the database in ***Database Password*** text field.

ix. Enter the port number of the database in the ***Database Port Number*** field.

x. Enter the Table Owner or Schema Name database in the ***Table Owner / Schema Name*** field, to assess the data associated to the selected table owner or schema.

xi. Enter the comments in the ***Description*** text box**.**

xii. Click ***Save*** button. Once the database connection details are saved successfully, a confirmation message is prompted in the ***Setup Database Connection*** screen.

- The fields marked as | are mandatory fields.
- Ensure that the specified databases are accessible and running.
- To navigate to ***Setup Database Connection*** wizard screen from the ***Setup Database Connection*** popup window, click ***Cancel*** button.

To understand the functionality of each field in the ***Setup Database Connection*** popup window, refer to the table given below.

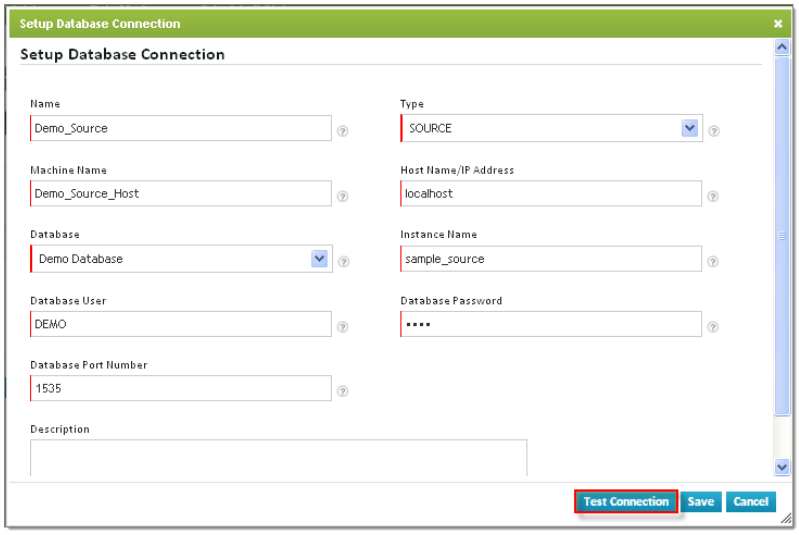
Fields	Functionality
Name	Define the name of the database connection.
Type	Drop down list to designate the datasource as Source / Target. For example, if "Source" is selected, then the datasource is considered as Source database.
Machine Name	Enter the name of the database server associated to the datasource. It is necessary to setup a database connection
Host Name/IP Address	Enter the Host Name/IP Address of the database server.
Database	Displays a list of supported databases and allows the user to select the database compatible to the datasource.
Instance name	Define the instance name of the database such as SID or Service Name.
Database User	Enter the user credentials (i.e., Username) required to connect to the database.
Database password	Enter the password corresponding to the Database User in order to connect to the database.
Database Port Number	Enter the Port number of the database server to establish the database connection.
Table Owner / Schema Name	Enter the table owner or scheme existing in the database, to assess the data associated to the selected table owner or schema.
Notes	It facilitates the user to enter the description associated with the database connection.
Test Connection	Used to verify whether the connection details provided are valid and whether the connection to the database can be established based on the specified details.

	• If the details provided are valid, the database connectivity will be established and saved. • If the given details are invalid, the database connectivity fails and alerts the user to verify the details.
Save	Used to save the database connection details.
Cancel	Used to navigate to the ***Setup Database Connection*** screen

3.1.1.1 Create Like, Editing or Testing the database connections

Test Connection feature is designed to provide feasibility to verify whether the connection details specified during database connection creation are valid. To test the database connection, do the following:

1. In ***Setup Database Connection*** screen, hover on the database connection the needs to be verified. The three links (Create Like, Create and Edit) will appears beneath the database connection.
2. Click ***Create Like or Edit*** button, to verify the connection details of the database connection. The ***Setup Database Connection*** popup window is prompted to edit /create a replica of the database connection as shown in the figure below.



3. Once the database connection details are saved successfully, in order to test the connection to the database based on the given details, click ***Test Connection*** button.
    - If the database is connected successfully, a message stating the successful connection to the database will be prompted.
    - If the database connection fails, an alert message to verify the given connection details will be prompted.

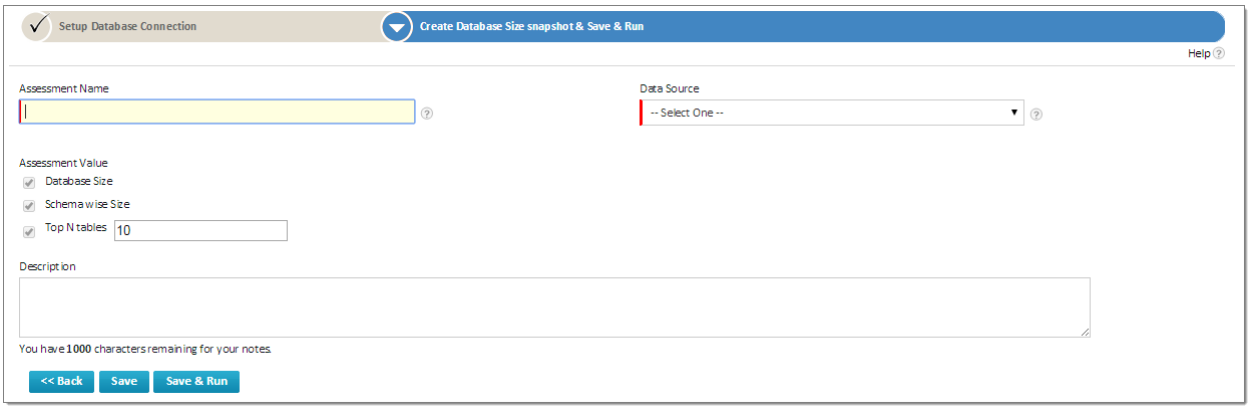
- The fields marked as | are mandatory fields.
- To create a replica of database, click on ***Create Like*** link. In ***Setup Database Connection*** enter the name of the replica in the ***Name*** text field.

3.1.2 Create Database Size Snapshot Assessment

Once the database connection setup is completed successfully, the user needs to create a data assessment and execute it to perform Data assessment effectively.

To create database size snapshot, do the following:

1. In ***Setup Database Connection*** screen, select the intended database connection and click ***Next*** button to navigate to the second step. The ***Create Database Size snapshot & Save & Run*** screen will be displayed as shown in the figure below.



2. Enter the name of the data assessment in the ***Assessment Name*** text field.
3. Select the appropriate database from the ***Data Source*** drop down list, to run the data assessment.
4. By default, ***Database Size snapshot*** will be prompted in the ***Assessment Type*** drop down list. It is a non-editable text field.
5. Select the required check box based on the requirement.
   - ***Database Size:*** this check box enables to assess the data for eligible archive data based on size of the selected database and displayed in the graphical representation.
   - ***Schema Size***: this check box enables to assess the data for eligible archive data according to the data distributed in each schema existing in database selected and summarizes the eligible archive data in the graphical representation
   - ***Top N Table:*** This check box enables to assess the data based on the size of the Top N tables. Here, "N" implies the number of tables.

6. Enter the value adjacent to the ***Top N tables*** check box, to pull up the data of given number of top tables in the databases for data assessment.
7. Click ***Save*** button, to save the data assessment.
8. Click ***Save & Run*** button, to save and execute the data assessment. A unique Run-ID will be generated and displayed in the ***Run Schedule*** screen. To monitor the status of the data assessment, click on Run ID to navigate to the ***Status Monitor*** screen. (***Status >Status Monitor***).

- The field marked as | are mandatory fields.
- Click ***Edit*** button, to modify the data assessment.

3.2 Archive Eligibility

Archive Eligibility enables to identify the archive eligible data at both table level and object level. This feature provides the feasibility to perform the assessment on tables based on the date column. Once retention policy is applied, the data found within the retention policy duration till the current date is considered as an active data (i.e., non-eligible archive data) and rest of the data is considered as an inactive data (i.e., eligible archive data).

For example,

- If Retention policy duration is "3 years" and current date is "01/01/2014", then the data found between "01/01/2011" is considered as "Active data". Whereas, the data beyond 01/01/2011 is considered as "Inactive data".

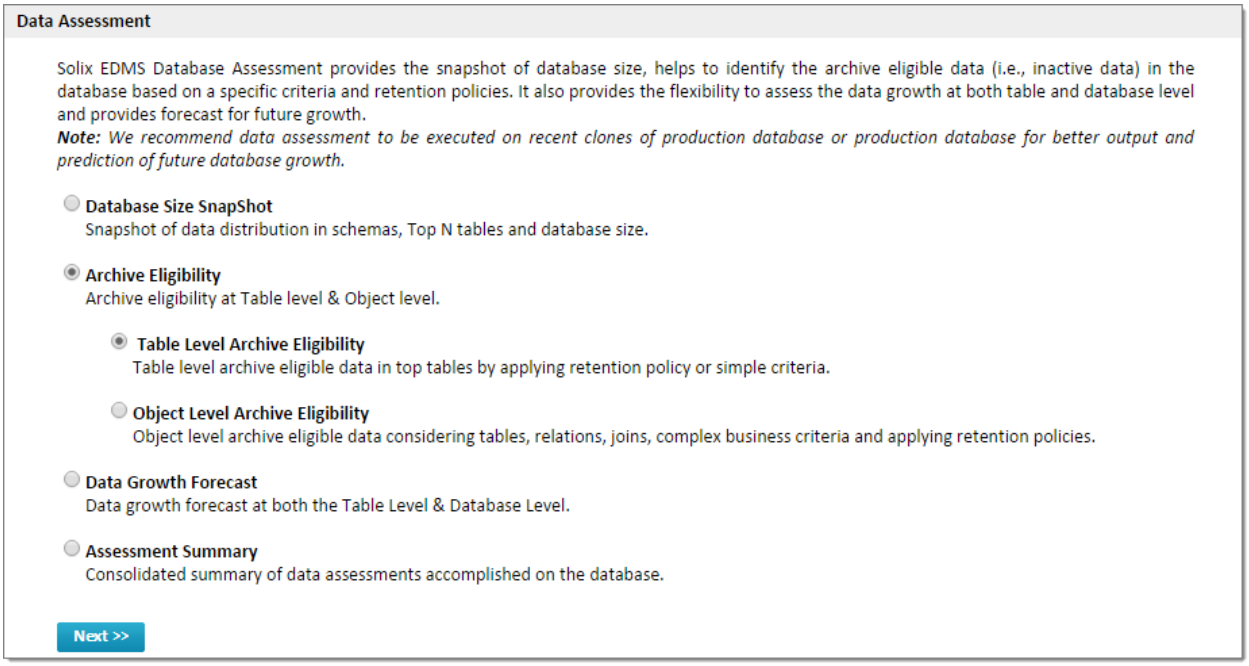
When a simple criterion is designed on the date column, it is applicable based on the dynamic date value provided by the user.

For example,

- Suppose, the dynamic date provided by the user is "18/7/2013", then the data found from "18/7/2013" till current date is considered as "Active data". Whereas, the data beyond "18/7/2013" is considered as "Inactive data".

Data assessment for Archive Eligibility

Once ***Archive Eligibility*** is selected in the ***Data Assessment*** screen, ***Table Level Archive Eligibility*** and ***Object Level Archive Eligibility*** radio button will be populated as shown in the figure below.



Archive Eligibility contains two different methods ***Table Level Archive Eligibility*** and ***Object Level Archive Eligibility,*** to provide the flexibility to the user to assess the data in the database and identify the active or inactive data available in the tables or tables in the data assessment.

- Make sure that the Database Snapshot must executed atleast once.

3.2.1 Table Level Archive Eligibility

This option enables to identify the archive eligible data existing in the selected top tables based on the retention policy or simple criteria.

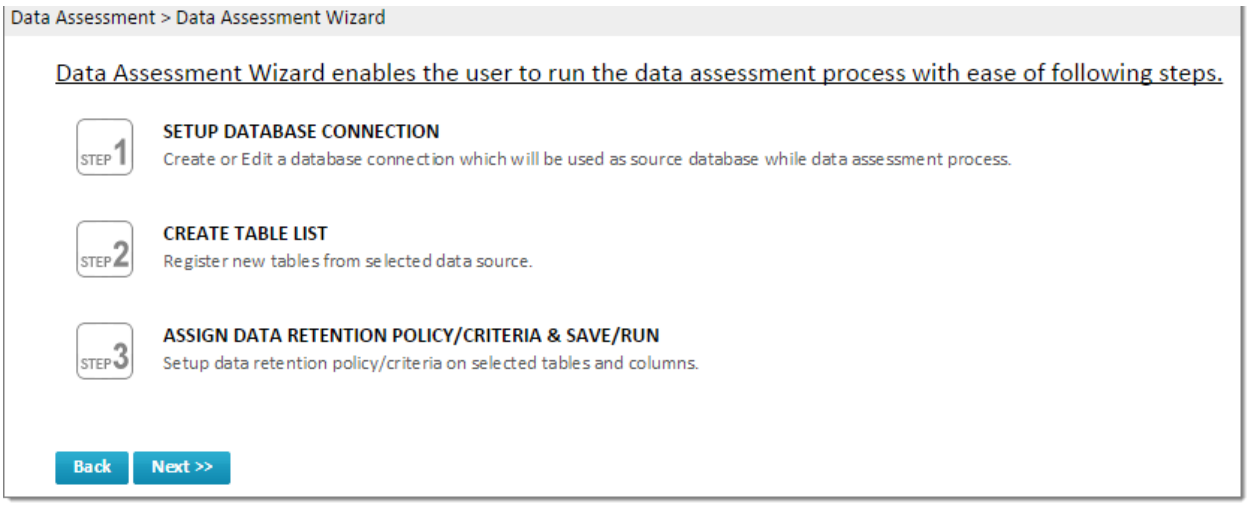
Benefits of Table level Archive Eligibility:

- Helps to identify the archive eligible data in the selected top tables based on the retention policy or simple criteria.
- User control flexibility to view the archive eligible data in the database.
- Provide the flexibility to create a retention policy during the Data assessment within the wizard.
- Helps to load the top tables from the database snap shot and identify the active or inactive data from those top tables as well.
- Ease to identify the inactive or active data existing in the top tables so that the inactive data can be archived and reduce the occupied space in the database that helps improves the performance.

Data Assessment for Table Level Archive Eligibility

Once ***Table Level Archive Eligibility*** option is selected in the ***Data Assessment*** screen, by default, the ***Data Assessment Wizard*** initial screen will be displayed which shows the summary of each step designed to accomplish the data assessment successfully.

This section outlines the procedure to setup a connection, select top tables (i.e., tables with more size), assign retention policy and then saves & run the data assessment to identify the archive eligible data in the selected top tables.



Solix EDMS Data Assessment Standard Edition (SE) Wizard provides feasibility to identify the eligible archive data in the top tables with ease of three steps given below.

1. Setup Database Connection

2. Create Table List
3. Assign Data Retention Policy /Criteria & Save /Run

3.2.1.1 Setup Database Connection

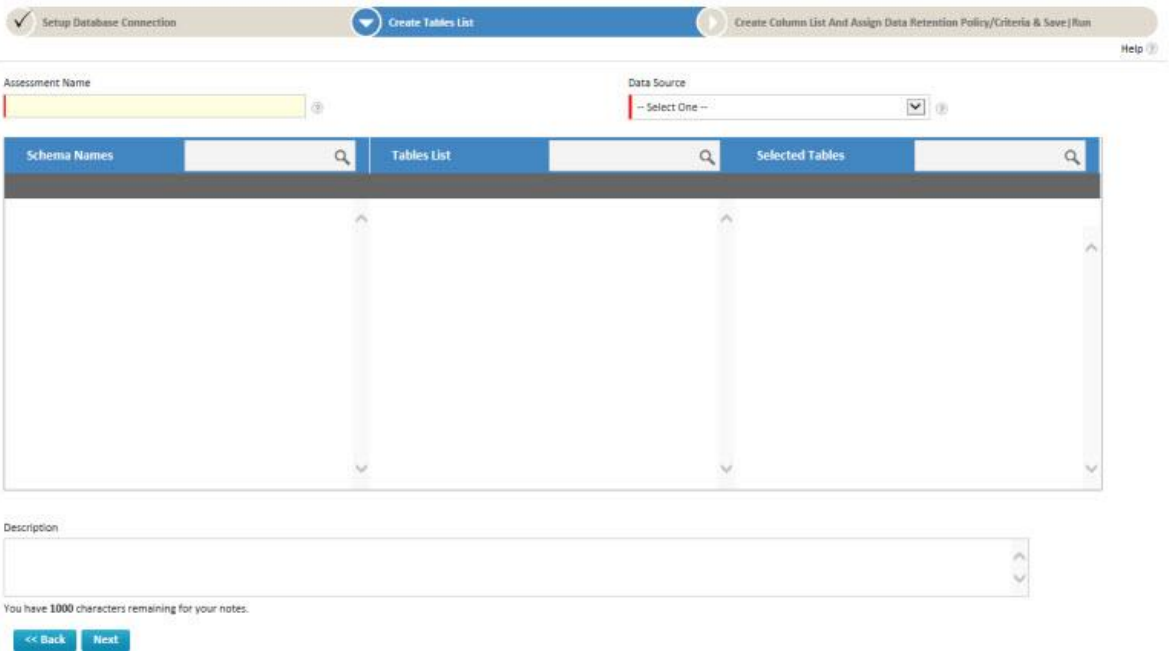
Refer to section 3.1.1, for Setup Database Connection

3.2.1.2 Create Tables List

Once the database connection setup is completed successfully, the user needs to select tables from the database to perform Data assessment on the top tables effectively.

To create tables list, do the following:

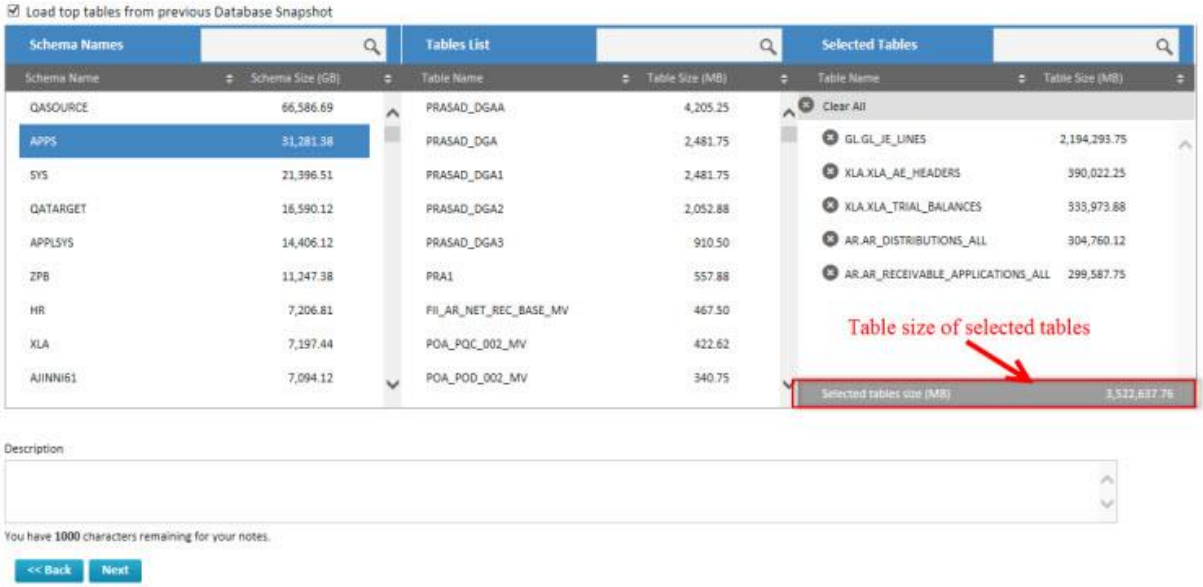
1. In ***Setup Database Connection*** screen, select the intended database connection and click ***Next*** button to navigate to the second step. The ***Create Tables List*** screen will be displayed as shown in the figure below.



2. Enter the name of the data assessment in the ***Assessment Name*** text field.
3. Select the appropriate database from the ***Data Source*** drop down list, to run the database assessment.
    - If Database Snapshot assessment is already executed for the selected data source, then "***Load top tables from previous Database Snapshot***" checkbox will populate in the ***Create Tables screen***. It enables to load all the top tables from the previous Database Snapshot assessment.
4. By default, the schemas exist in the database will populate with the corresponding schema size in the ***Schema Names*** pane.
5. Select the required schema in the ***Schema Names*** pane. Once schema is selected, all the tables associated to the schema will populate with corresponding table size in

the ***Tables List*** pane. (Note: tables are displayed in the descending order according to the table size).

6. Select the tables from the ***Tables list***, to run data assessment on the selected top tables and identify the archive eligible data from the selected top tables.
7. Once the tables are selected, it is appended automatically in the ***Selected Tables*** pane and also shows the total table size of the selected tables as shown in the figure below.



8. Select table name created and click ***Next*** button to proceed with further step.

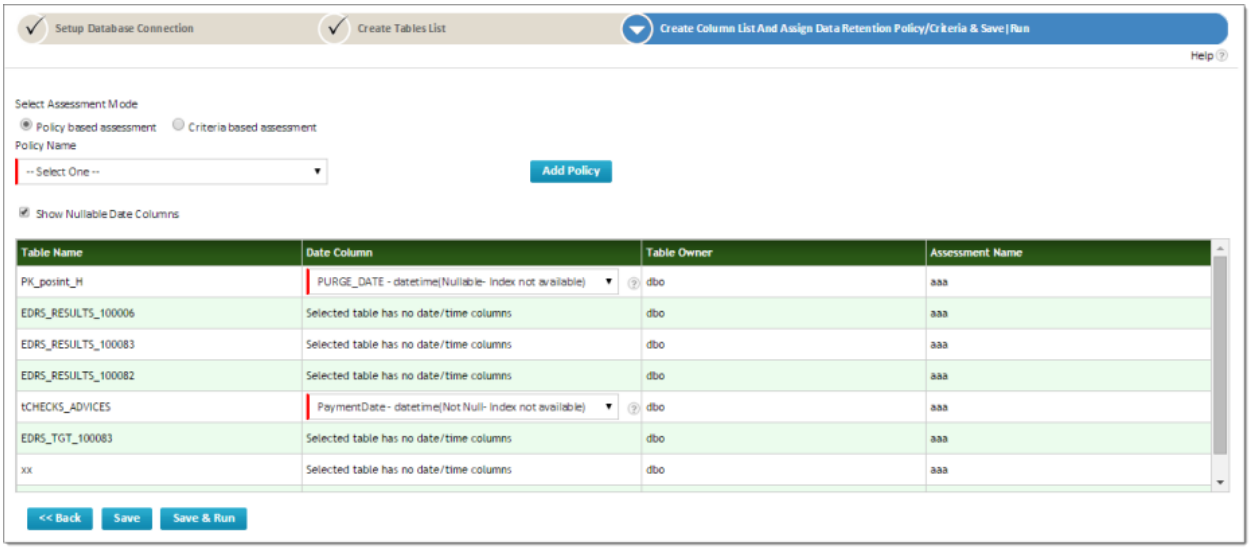
- The field marked as | are mandatory fields.
-  Magnifying icon helps to search for required schema or tables from the corresponding list or filter.
- Click ***Back*** button, to go back to previous step.
- To remove table from the list, Click 'X' ***Remove*** button adjacent to the selected table.

3.2.1.3 Assign Data Retention Policy /Criteria & Save /Run

Once the top tables are selected for the data assessment successfully, next step the user needs to assign data retention policy and run the data assessment.

To assign data retention policy and execute, do the following:

1. In the ***Create Tables List*** screen, select the tables and click ***Next*** button to navigate to the third step. The ***Create Column List And Assign Data Retention Policy/Criteria & Save Run*** screen will be displayed as shown in the figure below.



2. Select the required assessment option from the ***Select Assessment Mode***.

   - ***Policy based assessment***: This option enable to apply the retention policy on the selected tables and identify the archive eligible data existing in the tables are assessed for the duration specified in the retention policy. It also provides the flexibility to create the policy for the data assessment from this screen. This policy is applied on the "Date" columns selected from the ***Data Column*** drop down adjacent to the required tables. (Note: the ***Data Column*** drop down display the date columns existing in the corresponding table.)

     For example,

     - If Retention policy duration is "3 years" and current date is "01/01/2014", then the data found between "01/01/2011" is considered as "Active data". Whereas, the data beyond 01/01/2011 is considered as "Inactive data".

   - ***Criteria based assessment***: This option enable to run the assessment based on the criteria specified and identify the archive eligible data existing in the tables are assessed until the date specified in the ***Criteria value*** text field.

     For example,

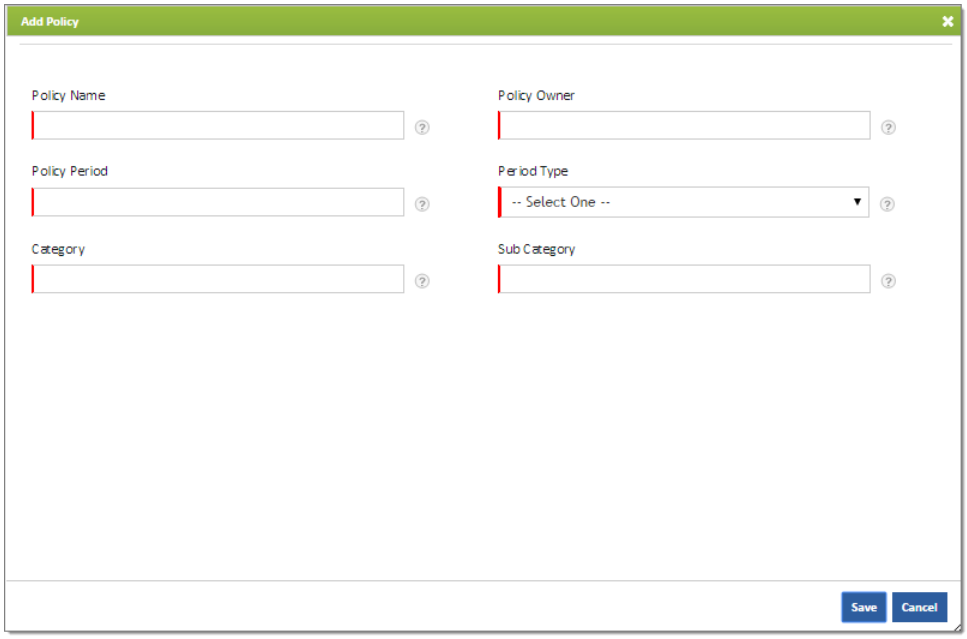
     - Suppose, the dynamic date provided by the user is "18/7/2013", then the data found from "18/7/2013" till current date is considered as "Active data". Whereas, the data beyond "18/7/2013" is considered as "Inactive data".

3. To apply retention policy on the data assessment,

   a. Select the ***Policy based assessment*** from the ***Select Assessment Mode***.

b. Select the intended policy from the ***Policy Name*** drop down list, to apply selected assessment policy on the data assessment.

- To define a new policy, click ***Add Policy*** button. The Add Policy screen will display to enter the policy details.



i. Enter the policy name in the ***Policy Name*** text field.

ii. Enter the owner of the policy in the ***Policy Owner*** text field.

iii. Enter the duration of policy in the ***Policy Period*** text field.

iv. Select the appropriate type of duration from the ***Period Type*** drop down list. Based on the Policy Type selected, the Policy Period will be calculated in Years/Month/Days. For example, if Policy Period is "6" and Policy Type is "Months", then it is stated as duration of policy is 6 months.

- ***Years*** – This option indicates that the policy period is calculated in years.
- ***Months*** – This option indicates that the policy period is calculated in months.
- ***Weeks*** - This option indicates that the policy period is calculated in weeks.
- ***Days*** - This option indicates that the policy period is calculated in days.

v. Select the required category from the ***Category*** drop down list. Based on the category selected, the corresponding sub categories will be displayed in the ***Sub Category*** drop down list.

vi. Select the intended sub category from the ***Sub Category*** drop down list.

vii. Click ***Save*** button. Once the data assessment policy is saved successfully, the data assessment policy will automatically populate and appears at the top of the list in the ***Policy Name*** drop down.

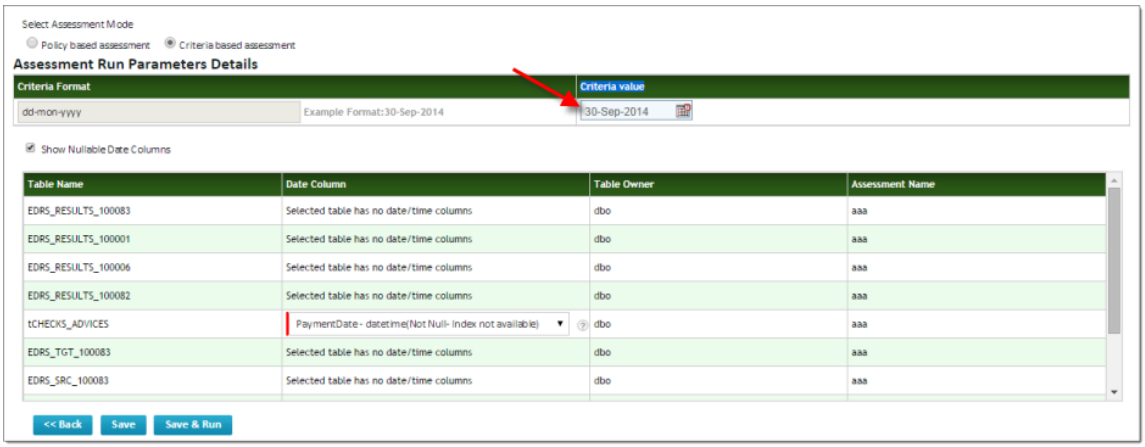
c. To populate the nullable date columns in the ***Data Column*** drop down, then select ***Show Nullable Date Columns*** check box.

d. Select the date column from the ***Data Column*** drop down adjacent to the required tables, to apply retention policy. (Note: the ***Data Column*** drop down will display the date columns existing in the corresponding table.)

4. To apply criteria on the data assessment,

a. Select ***Criteria based assessment*** from the ***Select Assessment Mode***.

b. Enter the required date in the ***Criteria Value*** text fields, to run the assessment on the tables until the specified date.



c. To populate the nullable date columns in the ***Data Column*** drop down, then select ***Show Nullable Date Columns*** check box.

d. Select the date column from the ***Data Column*** drop down adjacent to the required tables, to apply criteria on the selected column. (Note: the ***Data Column*** drop down will display the date columns existing in the corresponding table.)

5. Click ***Save*** button, to save the data assessment.

6. Click ***Save & Run*** button, to save and execute the data assessment. A unique Run-ID will be generated and displayed in the ***Run Schedule*** screen. To monitor the status of the data assessment, click on Run ID to navigate to the ***Status Monitor*** screen. (***Status >Status Monitor***).

Once the data assessment policy is assigned successfully, in case, the respective data assessment is set for execution the Solix EDMS Standard Edition (SE) will check whether any policies are applied on the data assessment or not. If policy is applied, then the execution of data assessment will be carried out according the policy criteria is defined.

- The field marked as | are mandatory fields.
- Click ***Back*** button, to go back to previous step.

3.2.2 Object Level Archive Eligibility

This option enables to identify the archive eligible data by defining tables, joins, tables relation based on the complex business compliances and applying the retention policy.

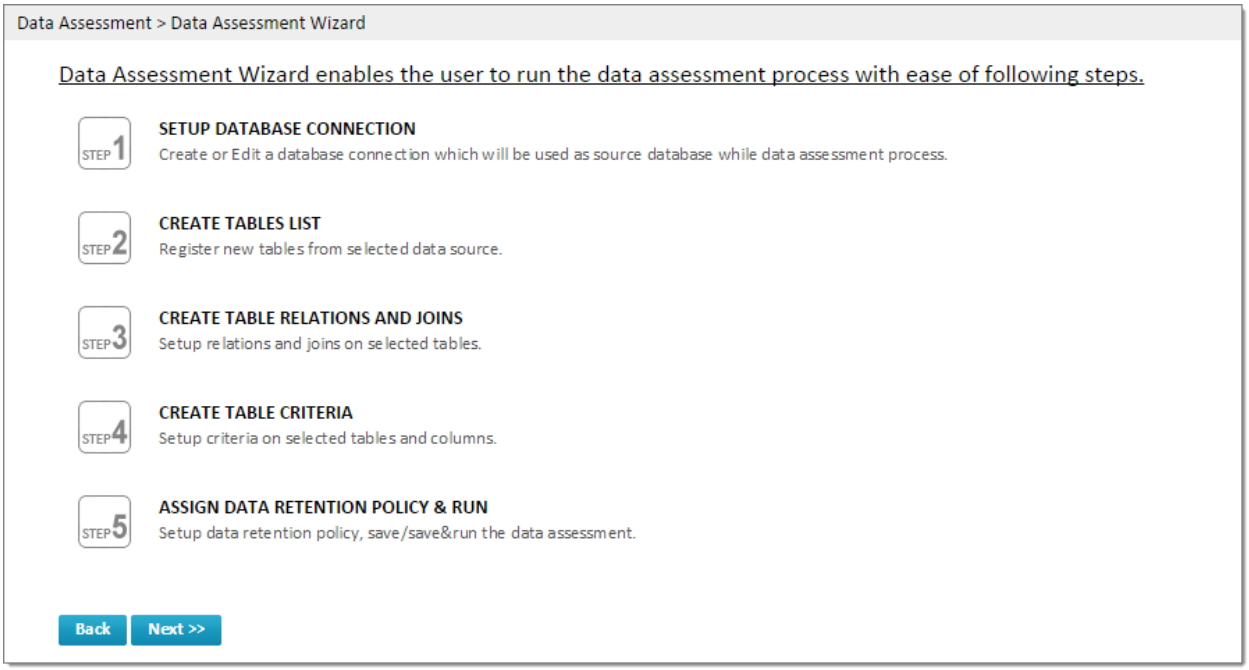
Benefits of Object level Archive Eligibility:

- Helps to identify the archive eligible data in the selected top tables of a Object based on the retention policy and complex business regulatory.
- Ease to identify the inactive or active data existing in the top tables of Object in the database so that the inactive data can be archived and reduce the occupied space in the database that helps improves the performance.

Data Assessment for Object Level Archive Eligibility

Once ***Object Level Archive Eligibility*** option is selected in the ***Data Assessment*** screen, by default, the ***Data Assessment Wizard*** initial screen will be displayed which shows the summary of each step designed to accomplish the data assessment successfully.

This section outlines the procedure to setup a connection, select top tables (i.e., tables with more size), create table relations and joins, create table criteria and assign retention policy and then saves & run the data assessment to identify the archive eligible data in the database.



Solix EDMS Data Assessment Standard Edition (SE) Wizard provides feasibility to identify the eligible archive data in the database with ease of five steps given below.

1. Setup Database Connection
2. Create Table List
3. Create Table Relations and Joins
4. Create Table Criteria
5. Assign Data Retention Policy & Run

3.2.2.1 Setup Database Connection

Refer to section 3.1.1, for Setup Database Connection

3.2.2.2 Create Tables List

Once the database connection setup is completed successfully, the user needs to select tables from the database to perform object wise data assessment effectively.

To create tables list, do the following:

1. In ***Setup Database Connection*** screen, select the intended database connection and click ***Next*** button to navigate to the second step. The ***Create Tables List*** screen will be displayed as shown in the figure below.

2. Enter the name of the data assessment in the ***Assessment Name*** text field.
3. Select the appropriate database from the ***Data Source*** drop down list, to run the database assessment.
4. By default, ***Object Level Archive Eligibility*** will be prompted in the ***Assessment Type*** drop down list. It is a non-editable text field.
5. Select ***New Object / Use Existing object*** from the ***Assessment Sub Type*** drop down list. Based on the option selected, the fields prompted will differs.
   - If ***New Object*** option is selected, enter the description and click ***Save*** button. Next,

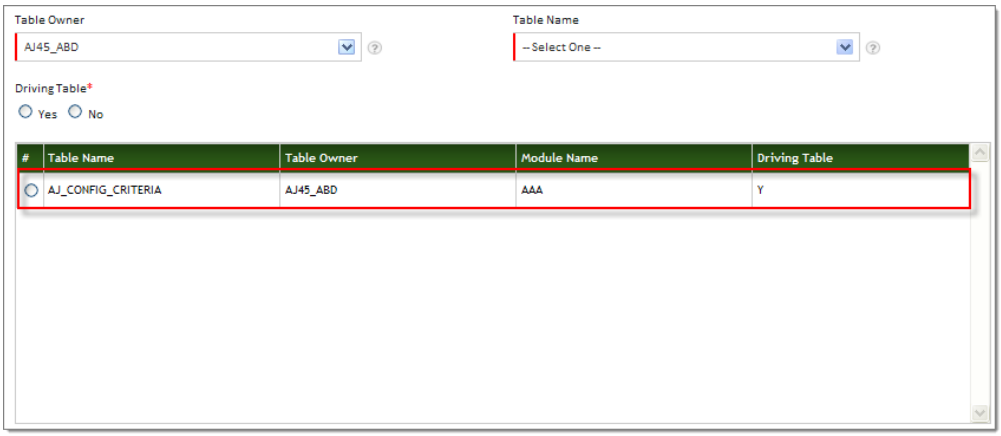
a. Based on the database selected, the corresponding schemas/table owners will be listed in the ***Table Owner*** drop down list.

b. Select a schema/table owner from the ***Table Owner*** drop down list. Based on the schema/table owner selected, the corresponding tables will be listed in the ***Table Name*** drop down list.

c. Select the intended table from the ***Table Name*** drop down list.

d. Select ***Yes/No*** option of ***Driving Table***, whether to define the selected table as Driving table or not. (***Note***: Make sure, atleast one table should be a driving table in data assessment object table).

e. Click ***Add*** button, to save and append the selected table information to the list. Once the information is saved successfully, a message stating "***New Table Saved Successfully***" is prompted on the screen and the respective table information will be appended to the list.



- If ***Use Existing object*** option is selected, additionally, the ***Config Name*** drop down and ***Populate*** button will be prompted in the screen

  a. The configuration designed for data archiving will be pulled up and displayed in the ***Config Name*** drop down. Hence, select the required configuration from the drop down.

  b. Click ***Populate*** button, to populate the tables, columns, relations, joins, criteria, generated code existing in the selected configuration for the data assessment.

  c. A confirmation message stating "***Config details populated successfully***." will be prompted in the screen and the respective table information will be appended to the list.

6. Select table name created and click ***Next*** button to proceed with further step.

- The field marked as | are mandatory fields.

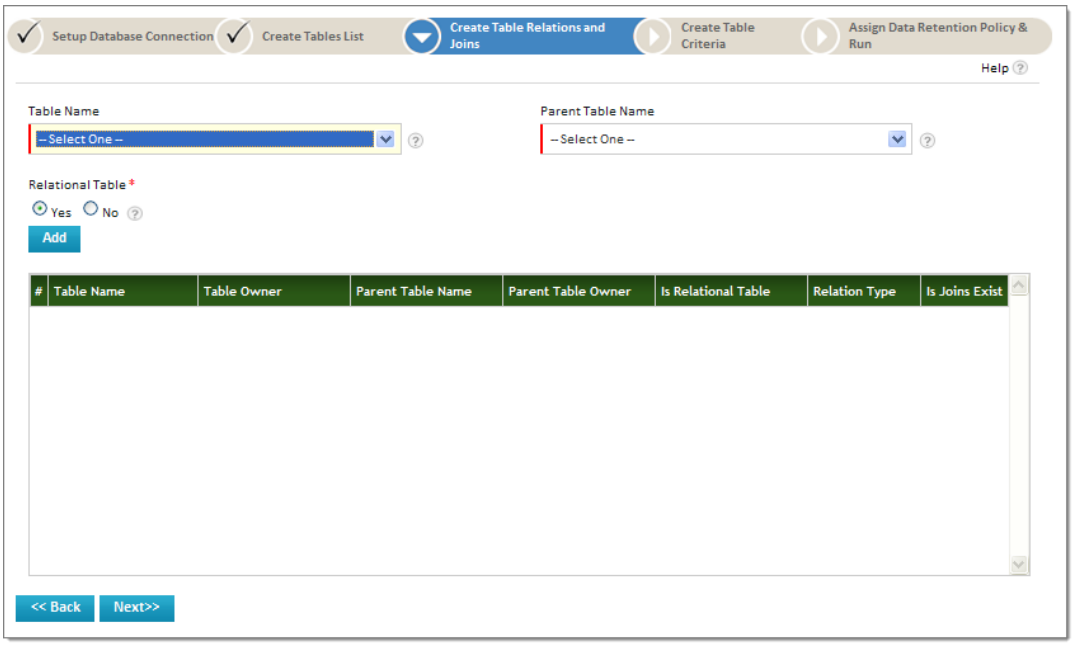
- Click ***Edit*** button, to modify the data assessment.
- To remove table from the list, Click ***Remove*** button.

3.2.2.3 Create Table Relations and Joins

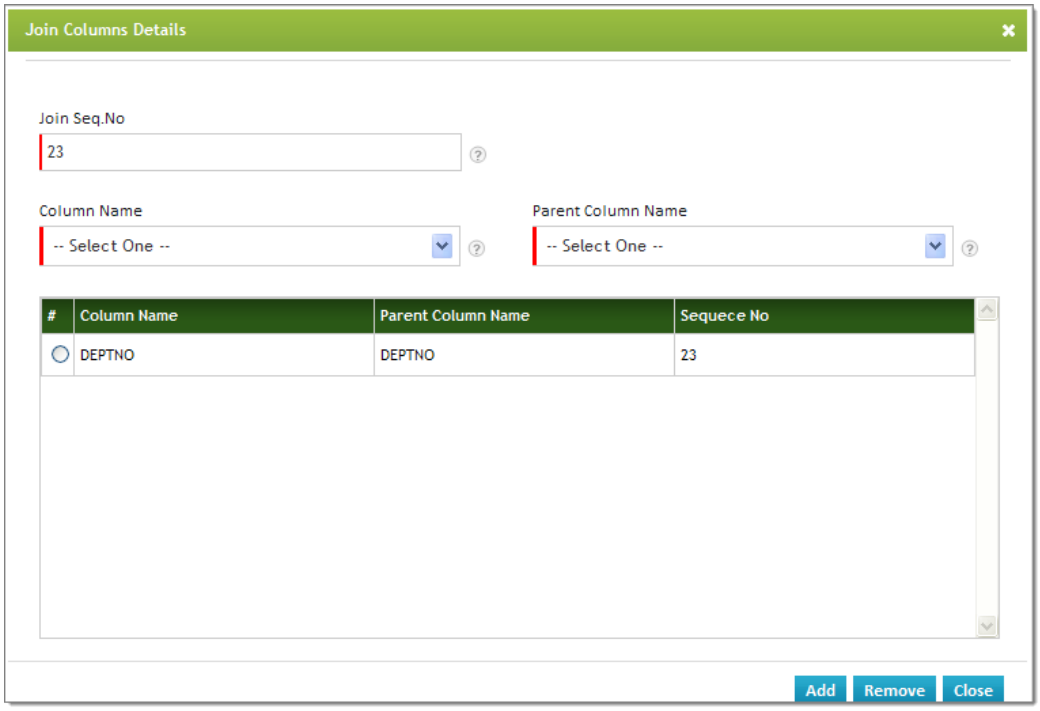
Once the tables are created for the data assessment successfully, next step the user needs to build the relation and joins among the between tables added in the data assessment, to fetch the data for data assessment effectively.

To build the relation, do the following:

1. In ***Create Tables List*** screen, select the intended database connection and click ***Next*** button to navigate to the third step. The ***Create Tables Relations and Joins*** screen will be displayed as shown in the figure below.



2. Select the table from the ***Table Name*** drop down.
3. Select the parent table (i.e., driving table) from the ***Parent Table Name*** drop down.
4. Select ***Yes/No*** option in the ***Relational Table***, whether to create a relation tables or not.
5. Click ***Add*** button. A confirmation message stating "Assessment Table Relation is Saved" will be prompted in the screen.
6. Once table relation is saved, then create joins in the relation. Hover on the table name appears in the list box.
7. Then, click on ***Joins*** hyperlink appears beneath the table name. The ***Join Columns Details*** popup screen will be prompted as shown in the figure below.



a. Enter the sequence number of the join in the ***Join Seq. No*** text box.

b. Select the primary key column from ***Column Name*** and ***Parent Column*** Name drop down.

c. Click ***Add*** button. Repeat the process to add join in the data assessment table.

d. Once the Data Assessment Table Join is saved, click ***Close*** button.

8. Select table relation created and click ***Next*** button to proceed with further step.

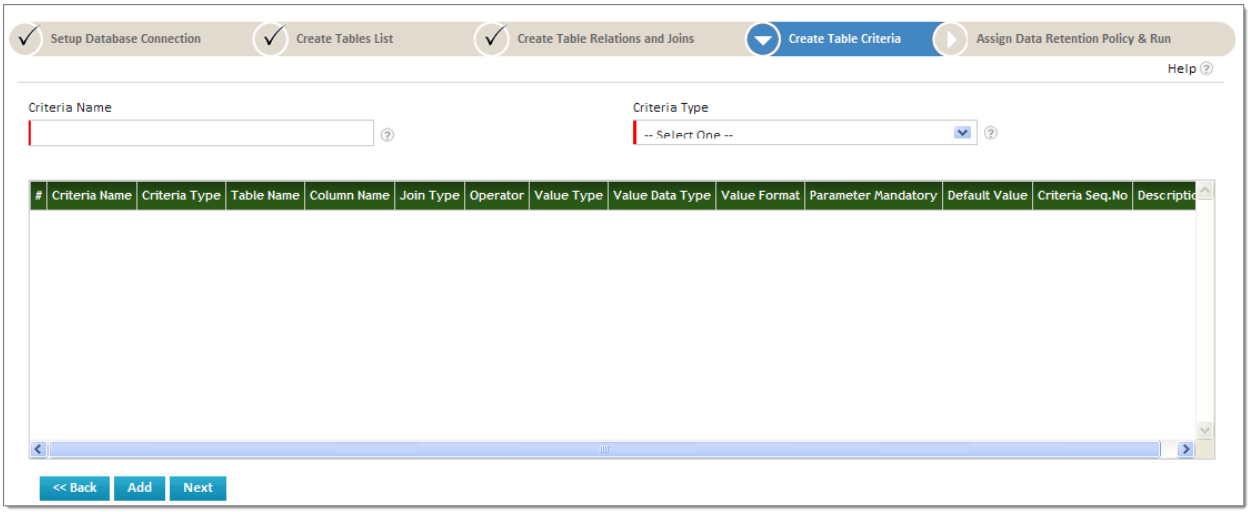
- Click ***Back*** button, to navigate to the previous screen.
- The field marked as | are mandatory fields.
- To remove table relations from the list, click ***Remove*** button.

3.2.2.4 Create Table Criteria

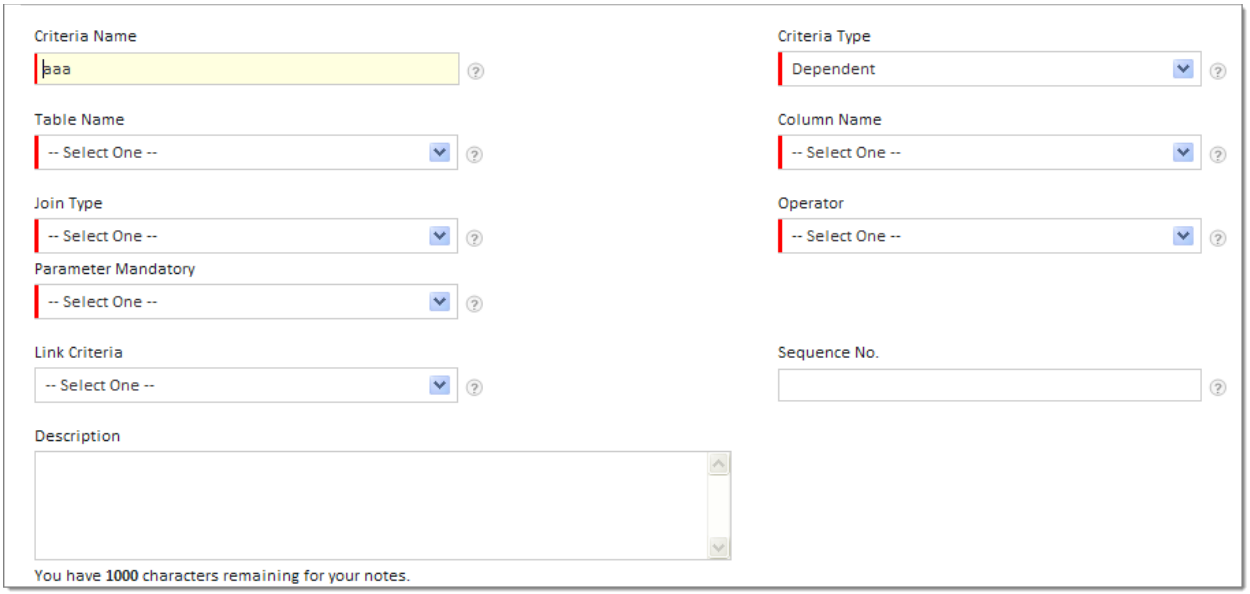
Once the table relations and joins are built among the tables in the data assessment successfully, next step the user needs to create table criteria.

To create table criteria, do the following:

1. In ***Create Tables Relations and Joins*** screen, select the intended database connection and click ***Next*** button to navigate to the forth step. The ***Create Table Criteria*** screen will be displayed as shown in the figure below.



2. Enter name of criteria in the ***Criteria Name*** text box.
3. Select an appropriate type of criteria from the ***Criteria Type*** drop down list. Based on the type of criteria selected, the fields prompted in the screen will vary as shown in the figure below.



4. Enter the criteria details in the corresponding fields
5. Click ***Save*** button to save the data assessment criteria. Once the criteria are saved successfully, a message will be prompted on the screen.
6. Select table created and click ***Next*** button to proceed with further step.

- The field marked as | are mandatory fields.
- Click ***Back*** button, go back to the previous screen.
- Click ***Edit*** button, to modify the given criteria details.
- To remove table criteria, click ***Remove*** button.

Below table illustrates the functionalities of fields in the ***Assessment Object Criteria Details*** screen.

Fields	Functionality
Criteria Name	Define a name for the criteria in Data Assessment**.**
Criteria Type	This drop down enables the user to select an appropriate type of criteria. The criteria type can be Static, Dependent and Independent. • ***Static***: It implies that the Data Assessment actions will be based on the value specified in Criteria. • ***Dependent***: It implies that the criteria designed are dependent on a particular column of the specific table. • ***Independent:*** It implies that the criteria are independent of tables and columns associated to specific Data Assessment.
Table Name	This drop down enables the user to select an appropriate table that holds the attribute value.
Column Name	Based on the table selected, the corresponding columns will be listed in this drop down. It enables the user to select the column on which the respective criteria will be applicable.
Join Type	This drop down enables the user to select an appropriate operand required for the criteria. (i.e., AND or OR).
Operator	This drop down enables the user to select an appropriate conditional operator required to design criteria. (i.e., =,>, <, <= and so on).

Value Type	This drop down enables the user to define the type of parameter value (i.e., Value or Dependent SQL) • ***Value:*** It implies that the data is fetched based on the value provided in the ***Value*** text box. • ***Dependent SQL:*** It implies that the SQL statement will be generated based on dependent variables which may be derived from the earlier parameters. For example, "SELECT ORGANIZATION_ID, ORGANIZATION_NAME FROM ORG_ORGANIZATION_DEFINITIONS" where organization name will be displayed at run time parameters for end user ease and organization id will be used in criteria. • ***SQL:*** During the runtime, the SQL statement will be executed and the archiving will be executed based on the value obtained from running the SQL script specified in ***Value***. For example, SELECT ORGANIZATION_ID FROM ORG_ORGANIZATION_DEFINITIONS
Data Type	This drop down facilitates to select an appropriate data type of the parameter. (i.e., Number, String, Date). Note: For the "***Dependent SQL"*** and "***SQL***" value type, "String" should be selected by default.
Format	If the Data type is "Date", this text box enables the user to provide the format of date. For example, MM/DD/YYYY.
Parameter Mandatory	This drop down enables the user to define the parameter as mandatory or not (i.e., Yes or No). • Yes- it implies that the parameter is a mandatory, the value must be entered • No–it implies that the parameter is not mandatory.
Sequence No	This text box enables the user to enter the Sequence of Criteria while execution.
Link	Exclusively when "OR" operator is selected in Join, this drop down list enables the user to link the current criteria to this existing criteria and place it in parenthesis during Data Assessment.
Value	This text enables the user to enter the appropriate value of the parameter according to the ***Value Type*** selected.

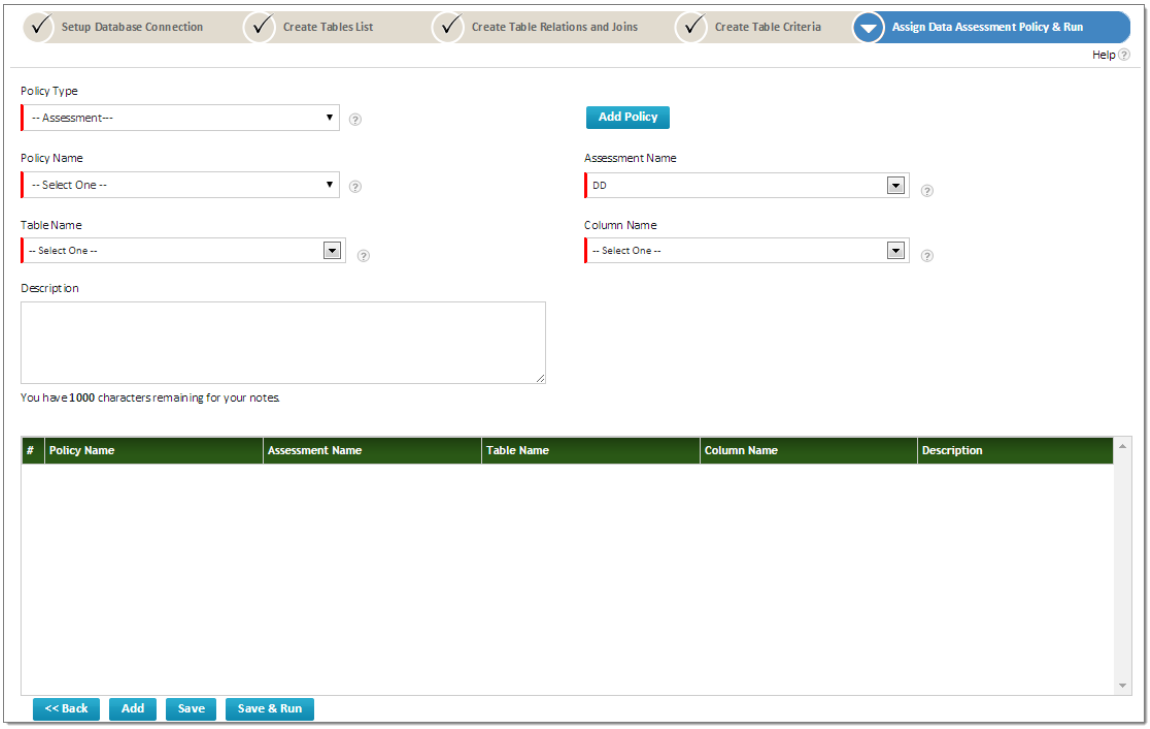
Default Value	This text enables the user to enter the default value of the parameter.
Description	This text box enables the user to enter the description pertaining to the criteria.
Save	This button is employed to save the criteria details.

3.2.2.5 Assign Data Retention Policy & Run

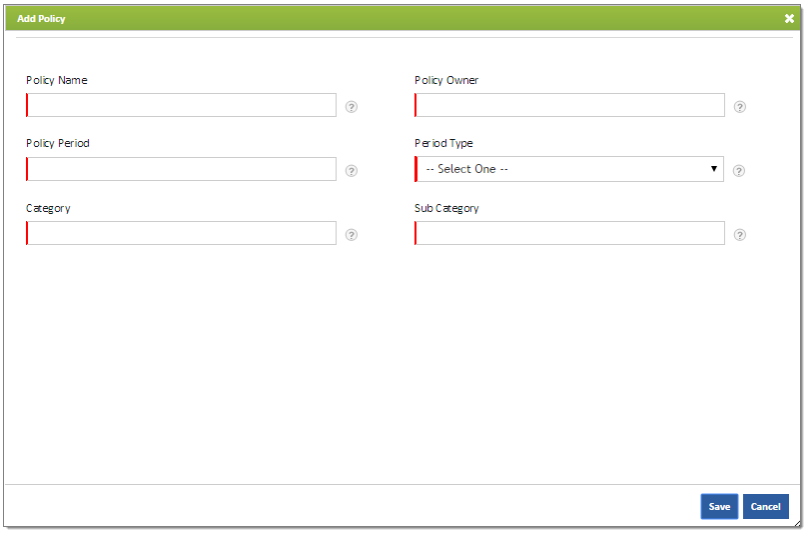
Once the table criteria are defined for the data assessment successfully, next step the user needs to assign data retention policy and run the data assessment. To assign a data retention policy, the user must have created atleast one policy for data assessment.

To assign data retention policy and execute, do the following:

1. In ***Create Table Criteria*** screen, select the table criteria created and click ***Next*** button to navigate to the fifth step. The ***Assign Data Retention Policy & Run*** screen will be displayed as shown in the figure below.



2. Select Assessment from the ***Policy Type*** drop down list.
3. Select the intended policy from the ***Policy Name*** drop down list, to apply selected assessment policy on the data assessment.
    - To define a new policy, click ***Add Policy*** button. The Add Policy screen appears.



i. Enter the policy name in the ***Policy Name*** text field.

ii. Enter the owner of the policy in the ***Policy Owner*** text field.

iii. Enter the duration of policy in the ***Policy Period*** text field.

iv. Select the appropriate type of duration from the ***Period Type*** drop down list. Based on the Policy Type selected, the Policy Period will be calculated in Years/Month/Days. For example, if Policy Period is "6" and Policy Type is "Months", then it is stated as duration of policy is 6 months.

- ***Years*** – This option indicates that the policy period is calculated in years.
- ***Months*** – This option indicates that the policy period is calculated in months.
- ***Weeks*** - This option indicates that the policy period is calculated in weeks.
- ***Days*** - This option indicates that the policy period is calculated in days.

v. Select the required category from the ***Category*** drop down list. Based on the category selected, the corresponding sub categories will be displayed in the ***Sub Category*** drop down list.

vi. Select the intended sub category from the ***Sub Category*** drop down list.

vii. Click ***Save*** button. Once the data assessment policy is saved successfully, the data assessment policy will automatically populate and appears at the top of the list in the ***Policy Name*** drop down.

4. Select the data assessment from the ***Assessment Name*** drop down list, to assign the data assessment policy**.** Once the data assessment is selected, the corresponding tables will be displayed in the Table Name text field.
5. Select the required table from the ***Table Name*** drop down list.
6. Select the column intended for data assessment from the ***Column Name*** drop down list**.**
7. Enter the comments in the ***Notes***.
8. Click ***Add*** button, to save and append the assign retention policy information in the list. On assignment is saved successfully, a confirmation message will be prompted in the screen and assigned retention policy details will be appended to the list.
9. Click ***Save*** button, to save the data assessment.
10. Click ***Save & Run*** button, to save and execute the data assessment. A unique Run-ID will be generated and displayed in the ***Run Schedule*** screen. To monitor the status of the data assessment, click on Run ID to navigate to the ***Status Monitor*** screen. (***Status >Status Monitor***).

Once the data assessment policy is assigned successfully, in case, the respective data assessment is set for execution the Solix EDMS Standard Edition (SE) will check whether any policies are applied on the data assessment or not. If policy is applied, then the execution of data assessment will be carried out according the policy criteria is defined.

- The field marked as | are mandatory fields.
- Click ***Edit*** button, to modify the data assessment.
- To remove data assessment policy assignment, click ***Remove*** button.

3.3 Data Growth Forecast

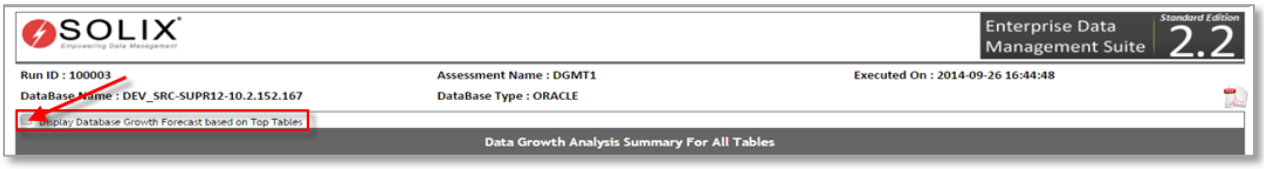
Data Growth Forecast perform the statistical analysis on the current data in the selected top table or top N tables and provide the forecast of future table size growth based on table or multiple tables for next 5 years. It also enables to analysis the data growth of business in the database within a given period and forecast the future database growth for next 5 years based on recent run or selected top N tables.

- Make sure that the Database Snapshot must executed atleast once.
- The data growth forecast is shown from the date when the data assessment is executed to the next coming 5 years.

Benefits of Data Growth Forecast:

- Helps to understand the top tables' growth in size for the next 5 years.
- Helps to understand the database growth based on the top tables' growth for the next 5 years.
- Provide the flexibility to load the top table from the recent run of database size snapshot and helps to predict the table size growth of those top tables for the next 5 years.
- Helps to understand the strategy to archive the data timely for improving the data storage management.
- Support parallel servers for faster execution of EDMS queries against the source database (only, Oracle database) that helps in consume less time for data retrieval. Solix supports '8' parallel server by default. In case, if user wants to increase the number of parallel servers, then based on the number of parallel servers supported by database the user can increase the parallel server upto 16, 24, 32 and so on.
- Parallel Servers are supported for both Table level forecast and Database level forecast
- For Database level forecast, the database data is segregated into master data and transactional data percentage that helps to predict the future database growth in both archived and non-archived.
- For Table Level Forecast, the master data and transactional data percentage is applicable only when the future database growth is predicted based on the

top tables' growth as shown in the figure below. (i.e., Display Database Growth Forecast based on Top Tables check box is selected in the graph).



Data Growth Forecast Parameters

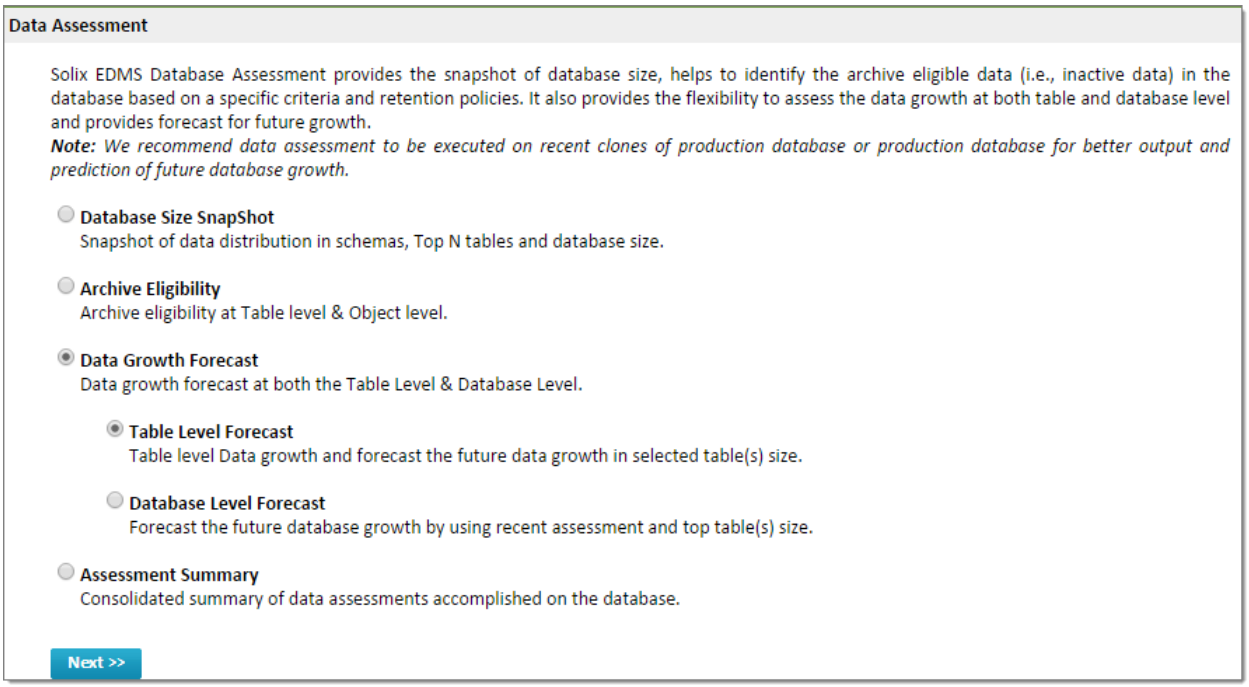
While forecasting the data growth, the user is provided the flexibility to modify the seed data provided by Solix according to the requirement. The Parameter screen (*Admin* > *Manage Source/Target Dictionary*> *Parameter*) enables to modify the parameter value of parameter. Once the parameter value is modified, it reflects the data growth forecast accordingly.

The parameters related to Data Growth Forecast Assessment are provided below.

Parameters	Description
MASTER_DATA_INCREMENT_PERCENTAGE	Percentage of Master Data Incremental during Data Growth Forecast Assessment
TRANSACTIONAL_DATA_PERCENTAGE	Transactional Data Percentage considered during Data Growth Forecast Assessment
PARALLEL_COUNT	Number of parallel servers for faster execution of EDMS queries against the source database during Data Growth Forecast Assessment.
ASSESSMENT_DAYS_DIFFERENCE	Minimum number of assessment days difference between two Database Size Snapshot runs for Data Growth analysis.
ASSESSMENT_PERCENTAGE_INCREASE	Default Assessment Percentage increase for Data Growth analysis when Database Size Snapshot assessment details does not exist.
ASSESSMENT_PROJECTION_YEARS	Number of Assessment Projected years for Data Growth analysis. For example, if parameter value is 10 years, then the data growth is forecasted for next 10 years.
ASSESSMENT_FILTERED_VALUE	Provide flexibility to avoid unwanted values in the database for data growth forecast. • Y – Consider only the filtered values (i.e., eliminate unwanted values) in the database for data growth forecast. • N – By default, consider all the values in the database for data growth forecast.

Data Assessment for Data Growth Forecast

Once ***Data Growth Forecast*** option is selected in the ***Data Assessment*** screen, the ***Table Level Forecast*** and ***Data Growth Database Forecast*** radio button will be populated as shown in the figure below.

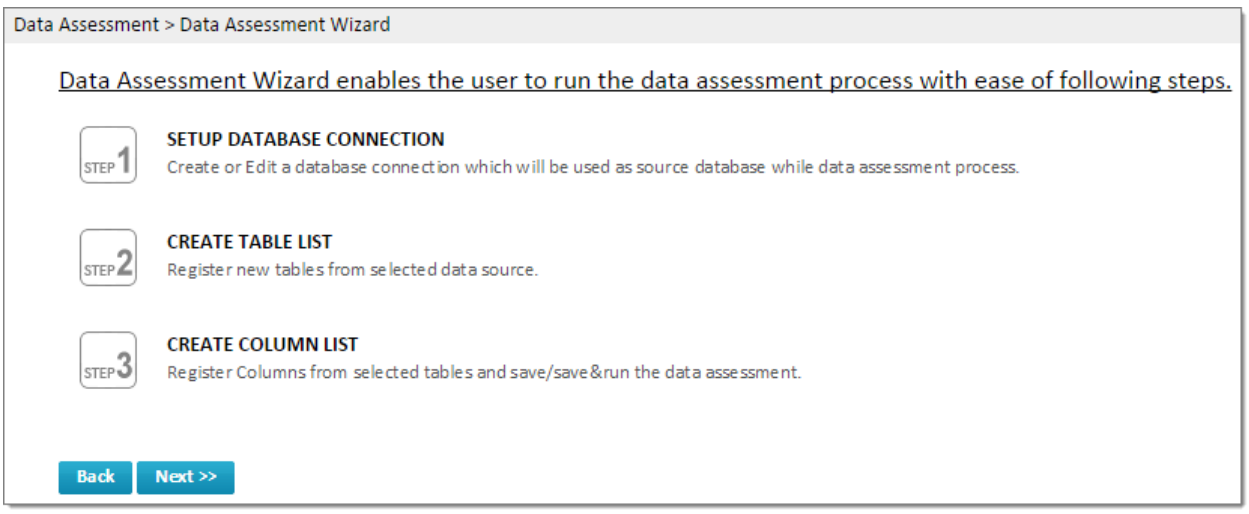


3.3.1 Table Level Forecast

Table Level Forecast enable to analysis the data growth of business based on the multiple top tables data and forecast the future data growth in the business for next 5 years.

Once ***Table Level Forecast*** option is screen, by default, the ***Data Assessment Wizard*** initial screen will be displayed which shows the summary of each step designed to accomplish the data assessment successfully.

This section outlines the procedure to setup a database connection, register top tables (i.e., tables with more size) for data growth table level forecasting, register columns (only the date columns of corresponding table will display in the drop down) and then saves & run the data assessment to forecast the database growth based on multiple tables data growth.



Solix EDMS Data Assessment Standard Edition (SE) Wizard provides feasibility to analysis the data growth of database at table level with ease of three steps given below.

1. Setup Database Connection
2. Create Table List
3. Create Column List

To initiate the data assessment and navigate to the first step in the wizard, click ***Next*** button.

3.3.1.1 Setup Database Connection

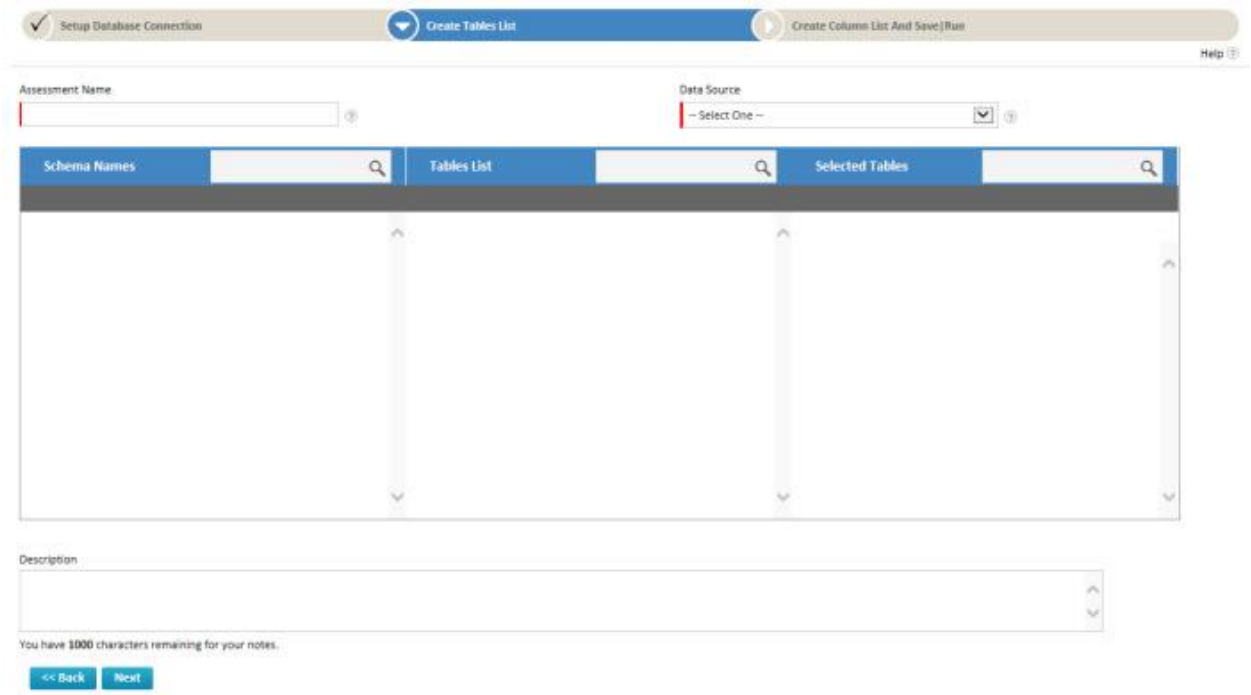
Refer to section 3.1.1, for Setup Database Connection

3.3.1.2 Create Tables List

Once the database connection setup is completed successfully, the user needs to select tables from the database to analysis the database growth on top tables selected effectively.

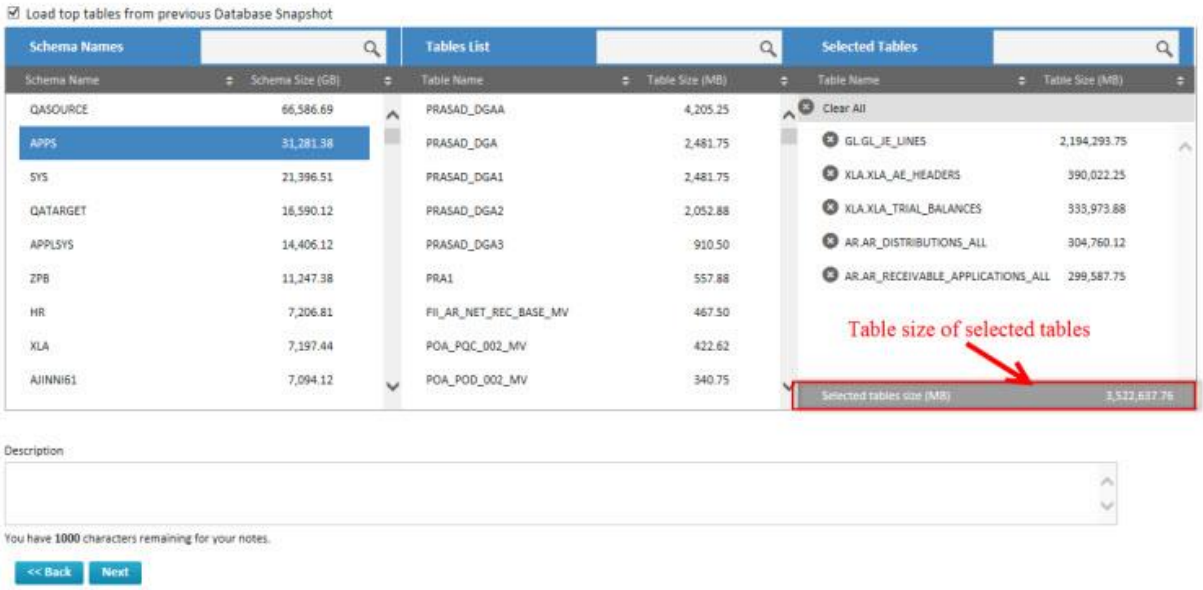
To create tables list, do the following:

1. In ***Setup Database Connection*** screen, select the intended database connection and click ***Next*** button to navigate to the second step. The ***Create Data Growth Multiple Tables ForeCast*** screen will be displayed as shown in the figure below.



2. Enter the name of the data assessment in the ***Assessment Name*** text field.
3. Select the appropriate database from the ***Data Source*** drop down list, to run the database assessment.
    - If Database Snapshot assessment is already executed for the selected data source, then "***Load top tables from previous Database Snapshot***" checkbox will populate in the ***Create Tables screen***. It enables to load all the top tables from the previous Database Snapshot assessment.

4. By default, the schemas exist in the database will populate with the corresponding schema size in the ***Schema Names*** pane.
5. Select the required schema in the ***Schema Names*** pane. Once schema is selected, all the tables associated to the schema will populate with corresponding table size in the ***Tables List*** pane. (Note: tables are displayed in the descending order according to the table size).
6. Select the required tables from the ***Tables list*** pane, to run data assessment and forecast the future database growth based on the multiple tables.
7. Once the tables are selected, it is appended automatically in the ***Selected Tables*** pane and also shows the total table size of the selected tables as shown in the figure below.



8. Select table name created and click ***Next*** button to proceed with further step.

- The field marked as | are mandatory fields.
-  Magnifying icon helps to search for required schema or tables from the corresponding list or filter.
- Click ***Back*** button, to go back to previous step.
- To remove table from the list, Click 'X' ***Remove*** button adjacent to the selected table.

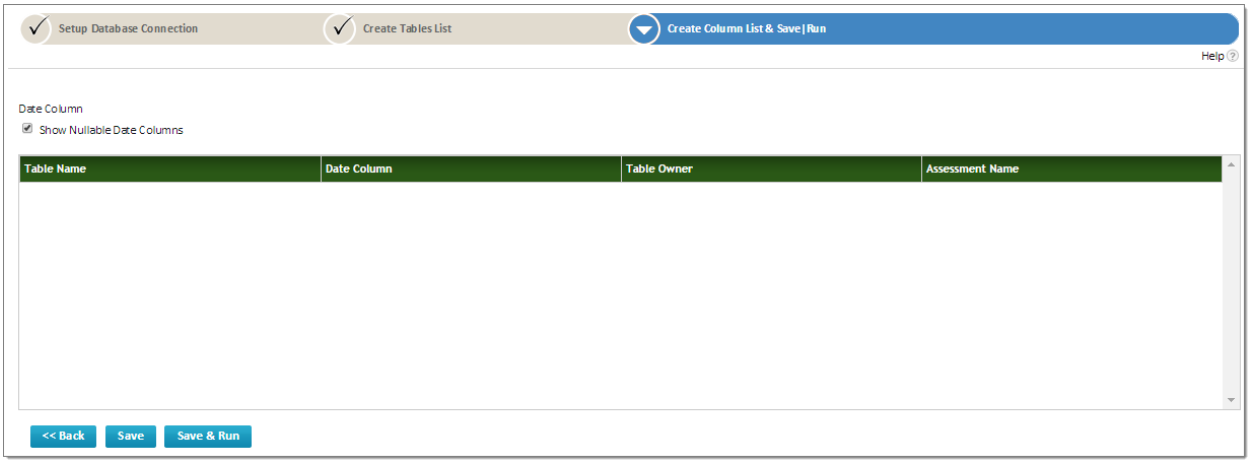
3.3.1.3 Create Column List

Once the top tables are selected for the data assessment successfully, next step the user needs to select the date column from the Column list to run the data assessment.

Only, the top tables that contains date columns shows the column enabled in the ***Date Column*** and remaining will remain static. Therefore, the drop down will populate all the date columns existing in the corresponding top table and enables to select the required date column to run the data assessment accordingly on the top tables.

To register date columns and execute, do the following:

1. In the ***Create Tables List*** screen, select the tables and click ***Next*** button to navigate to the third step. The ***Create Column List & Save/Run*** screen will be displayed as shown in the figure below.



2. To populate the nullable date columns in the ***Data Column*** drop down, then select ***Show Nullable Date Columns*** check box in ***Data column***.
3. Select the required date column from the ***Data Column*** drop down to run the data assessment based on the selected column in the table and forecast the future database growth. (Note: the ***Data Column*** drop down will display the date columns existing in the corresponding table.)
4. Click ***Save*** button, to save the data assessment.
5. Click ***Save & Run*** button, to save and run the data assessment to forecast the data growth based on the data column selected in the corresponding top tables. A unique Run-ID will be generated and displayed in the ***Run Schedule*** screen. To monitor the status of the data assessment, click on Run ID to navigate to the ***Status Monitor*** screen. (***Status >Status Monitor***).

- The field marked as | are mandatory fields.
- Click ***Back*** button, to go back to previous step.

3.3.2 Database level Forecast

Database level Forecast is designed to analysis the data growth of database based on top tables and forecast the future database growth based on top tables data growth in the graphical presentation. It helps to understand the strategy to archive the data timely for improving the

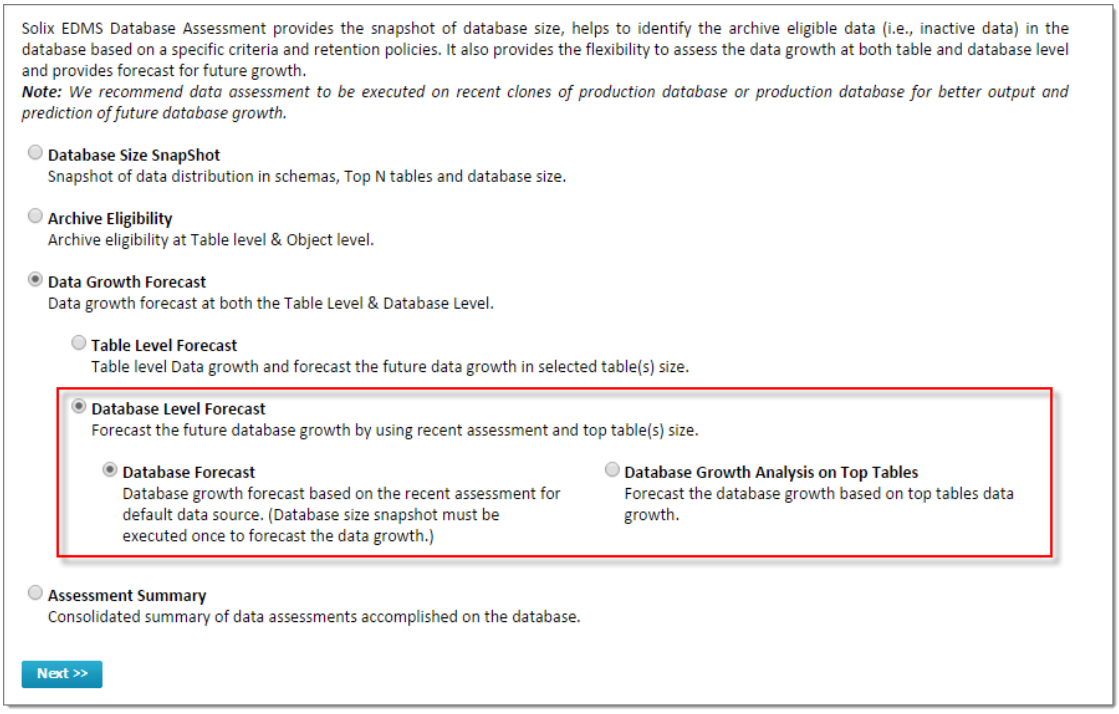
data storage management. (Make sure that the atleast once the database size snapshot must be executed to forecast the data growth.)

- For data growth database level forecast, the difference between two executions should be minimum "30" days.
- For one execution of data assessment, by default the data growth percentile is given as 15%.
- Forecasting the data growth of number of years is depended on the value specified for "ASSESSMENT_PROJECTION_YEARS' parameter (i.e., 'Assessment Projected years for Data Growth analysis'). For example, if the value is given as 5 years, the data growth forecast is shown from the date when data assessment is executed to the next 5 years.

Benefits of Database level Forecast:

- Provide the flexibility to load top N tables in the database or top tables used in the previous Database Size Snapshot.
- Help to understand the database growth in the business based on the data growth and top N tables growth.
- Help to take the proper measures to restrict the data storage management and improve the performance measurement based on the database forecast.

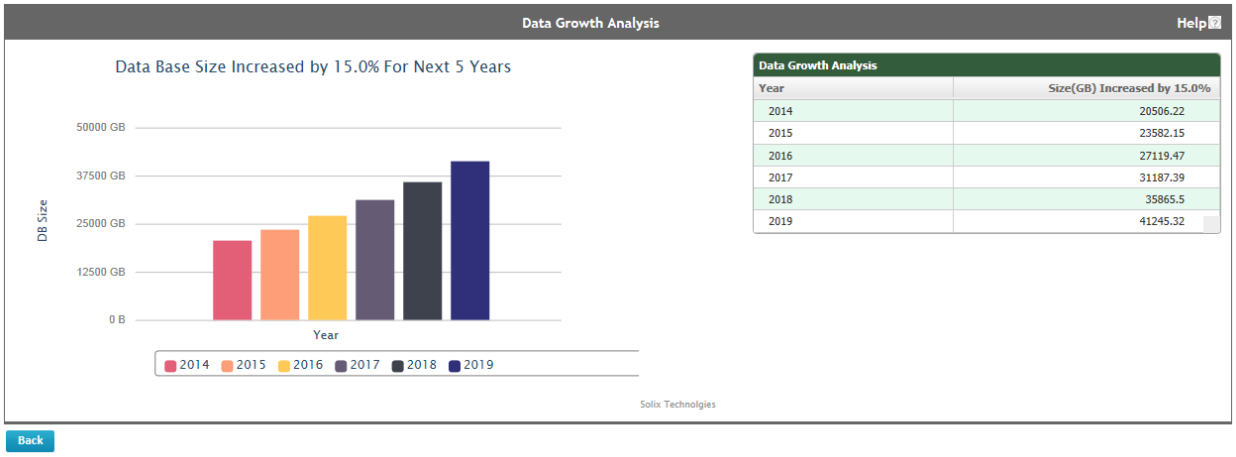
Once ***Database level Forecast*** option is selected in the ***Data Assessment*** screen, the ***Database Forecast*** and ***Database Growth Analysis on Top Tables*** radio button will be populated as shown in the figure below.



3.3.2.1 Database Forecast

Database Forecast shows the database growth forecast for next 5 years based on the recent run of data assessment in the default sources. Herein, the database data is segregated as master data and transactional data percentage that help to identify the database growth in both archived and non-archived.

Once ***Database Forecast*** is selected in the ***Data Assessment Options*** screen, by default, the ***Data Growth Analysis*** depicting the graphical representation and grid table representation of the data growth based on the database size is shown as given below.



- *Graphical representation*: Shows the growth of data in business every year with a percentage in a graph which is calculated based on the data growth encountered in the previous years.
- *Grid table*: Shows the growth of data in business every year with a percentage and accurate size of data been increased in the database.

3.3.2.2 Database Growth Analysis on Top Table

This feature enables to assess the selected top N tables and predict the database growth for next 5 years based on the growth of top N table size.

Benefits of Database Growth Analysis on Top Tables:

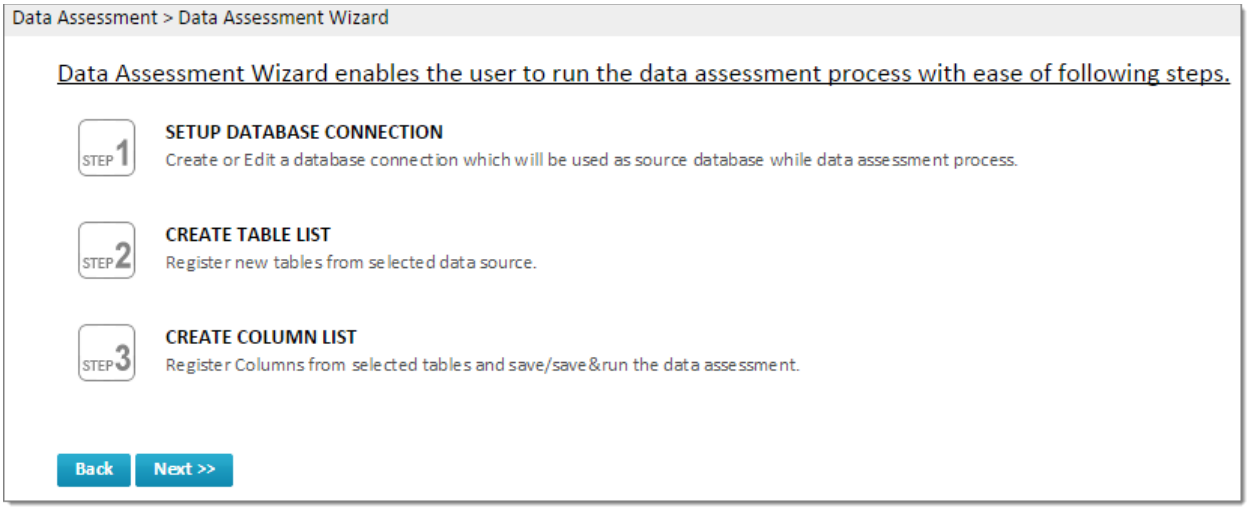
- Provide the flexibility to load top N tables in the database or top tables used in the previous Database Size Snapshot.
- Help to understand the database growth in the business based on the top tables and helps to understand the strategy to archive the data timely for improving the data storage management.

Data Assessment for Database Growth Analysis on Top Tables

Once ***Database Growth Analysis on Top Tables*** is selected in the ***Data Assessment*** screen, by default, the ***Data Assessment Wizard*** initial screen will be displayed which shows the summary of each step designed to accomplish the data assessment successfully.

This section outlines the procedure to setup a connection, register top tables (i.e., tables with more size) for database growth analysis, register columns (only date columns of corresponding

table will display in the drop down) and then saves & run the data assessment to forecast the database growth based on top tables data growth.



Solix EDMS Data Assessment Standard Edition (SE) Wizard provides feasibility to forecast the database growth based on top tables data growth with ease of three steps given below.

1. Setup Database Connection
2. Create Table List
3. Create Column List

3.3.2.3 Setup Database Connection

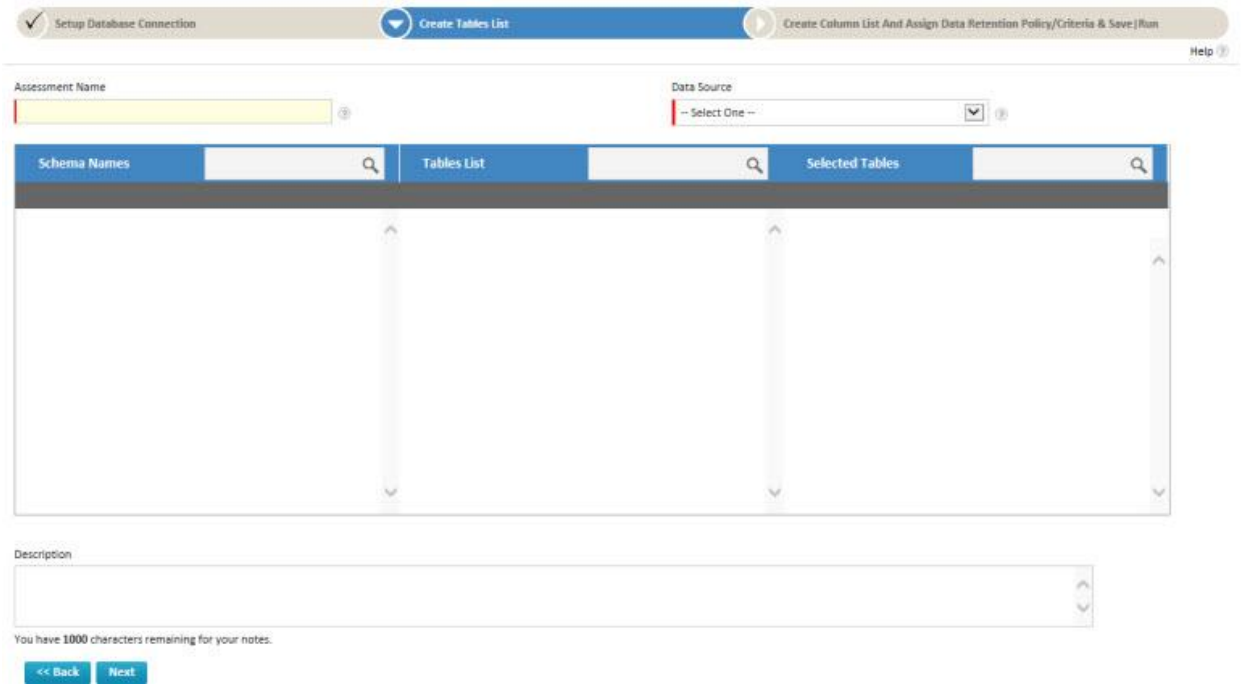
Refer to section 3.1.1, for Setup Database Connection

3.3.2.4 Create Tables List

Once the database connection setup is completed successfully, the user needs to select tables from the database to analysis the database growth on top tables selected effectively.

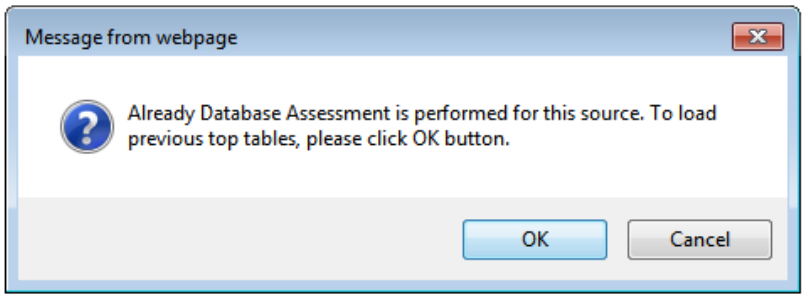
To create tables list, do the following:

1. In ***Setup Database Connection*** screen, select the intended database connection and click ***Next*** button to navigate to the second step. The ***Create Tables List*** screen will be displayed as shown in the figure below.



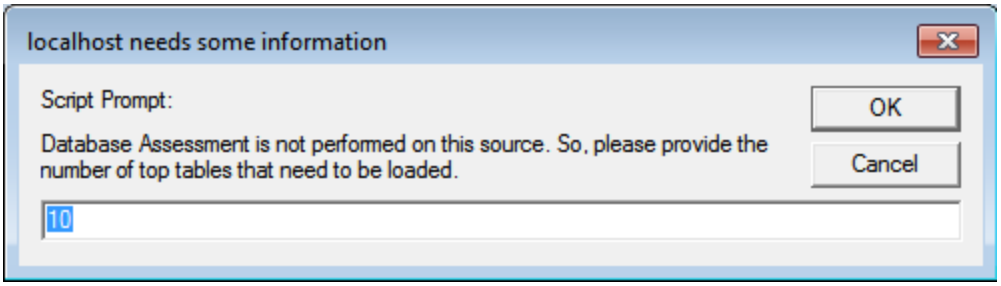
2. Enter the name of the data assessment in the ***Assessment Name*** text field.
3. Select the appropriate database from the ***Data Source*** drop down list, to analysis the selected top tables and forecast the future database growth based on the top tables for next 5 years. By default, the schemas exist in the database will populates in the ***Schema Names*** pane.

   - If Database Snapshot assessment is already executed on the selected data source, then an alert message pops up as shown in the figure below.



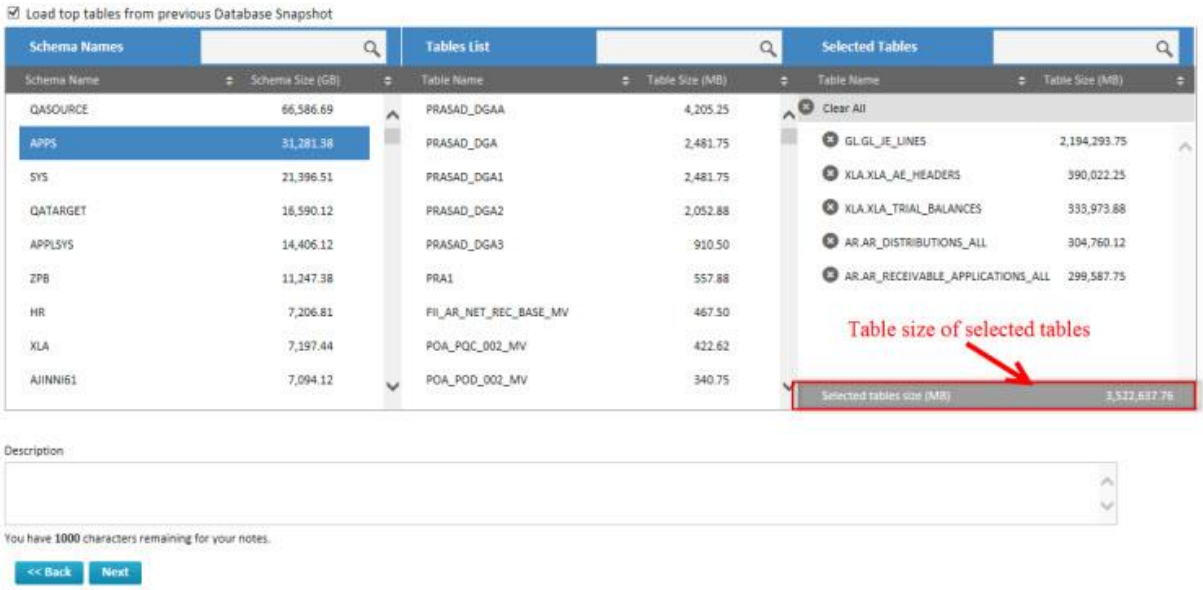
     - Click ***OK*** button, to load the all the top tables from previous Database Snapshot Assessment.

   - If database assessment is not performed on the selected data source, then an alert message pops up as shown in the figure below.



- Enter the number of top tables that need to be loaded and click ***OK*** button. Based on the number specified by the user, the top tables in the database will load in the ***Selected Tables list*** pane accordingly.

4. To select the additional top tables apart from the loaded top tables, select the required schema in the ***Schema Names*** pane. The top tables associated to the schema will load in the Tables list pane. (Note: tables are displayed in the descending order according to the table size).
5. Select the tables from the ***Tables*** list, to run data assessment based on the selected top tables and forecast the future database growth.
6. Once the tables are selected, it is appended automatically in the ***Selected Tables*** pane and also shows the total table size of the selected tables as shown in the figure below.



7. Select table name created and click ***Next*** button to proceed with further step.

- The field marked as | are mandatory fields.
-  Magnifying icon helps to search for required schema or tables from the corresponding list or filter.
- Click ***Back*** button, to go back to previous step.
- To remove table from the list, Click 'X' ***Remove*** button adjacent to the selected table.

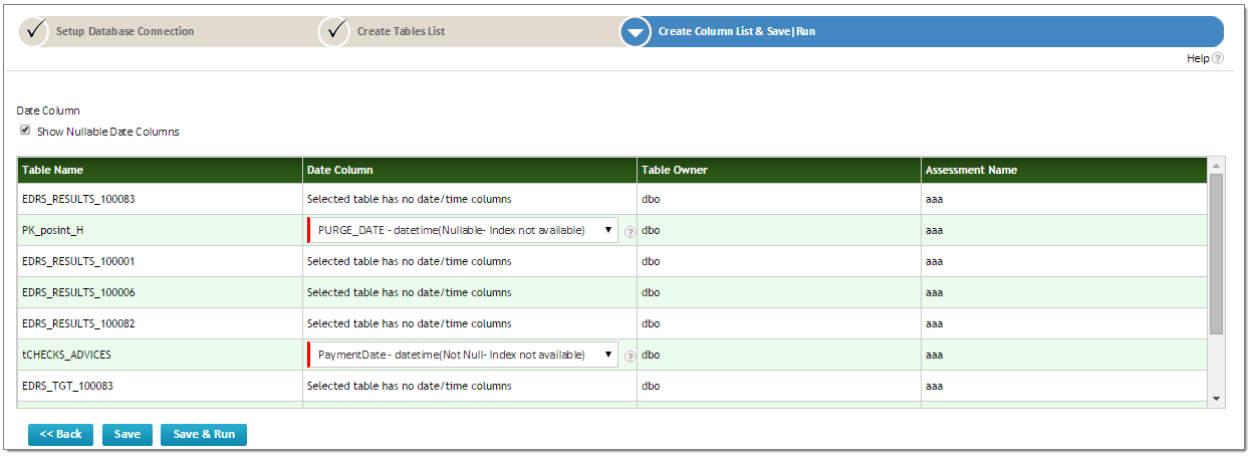
3.3.2.5 Create Column List

Once the top tables are selected for the data assessment successfully, next step the user needs to select the date column from the Column list to run the data assessment.

Only, the top tables that contains date columns shows the column enabled in the ***Date Column*** and remaining will remain static. Therefore, the drop down will populate all the date columns existing in the corresponding top table and enables to select the required date column to run the data assessment accordingly on the top tables.

To register date columns and execute, do the following:

1. In the ***Create Tables List*** screen, select the tables and click ***Next*** button to navigate to the third step. The ***Create Column List & Save/Run*** screen will be displayed as shown in the figure below.



2. To populate the nullable date columns in the ***Data Column*** drop down, then select ***Show Nullable Date Columns*** check box in ***Data column***.
3. Select the required date column from the ***Data Column*** drop down to run the data assessment based on the selected column in the table and forecast the future database growth. (Note: the ***Data Column*** drop down will display the date columns existing in the corresponding top table.)
4. Click ***Save*** button, to save the data assessment.
5. Click ***Save & Run*** button, to save and run the data assessment to forecast the data growth based on the data column selected in the corresponding top tables. A unique Run-ID will be generated and displayed in the ***Run Schedule*** screen. To monitor the status of the data assessment, click on Run ID to navigate to the ***Status Monitor*** screen. (***Status >Status Monitor***).

- The field marked as | are mandatory fields.
- Click ***Back*** button, to go back to previous step.

3.4 Assessment Summary

Assessment Summary provides the consolidated summary of all the data assessments executed on the database. It shows the graphical representation and grid tables that provide the consolidated information of database snapshot, archive eligible data, and database growth analysis. It also provides the flexibility to select the retention policy (i.e., duration) data analyzing the database growth with archived and without archived.

The user must execute the data assessment for all the data assessment types, to view the consolidated summary of all the data assessment types such as Database Size Snapshot, Archive Eligibility, and Data Growth Forecast for both Table Level Forecast and Forecast the future database growth by using recent assessment and top tables size.

Based on the data assessments executed on the database, the Assessment Summary screen will display the graphical representations accordingly

For example,

- In case, if "Database Size Snapshot and Archive Eligibility" is executed, then ***Assessment Summary*** screen displays the consolidated summary and graphical representation of only those data assessments.

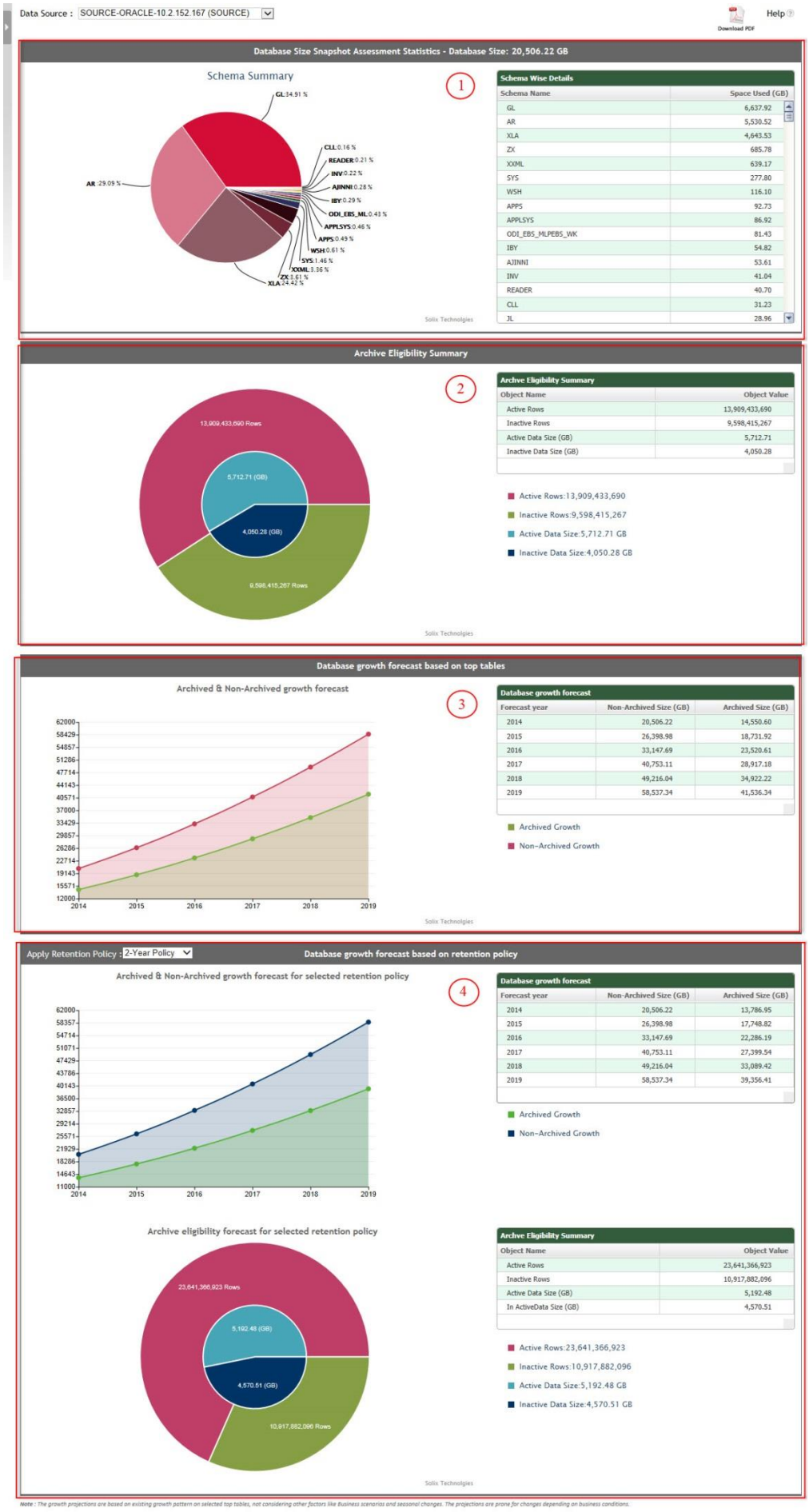
- Make sure that the database snapshot is executed atleast once on the database selected in the ***Assessment Summary*** screen.

Benefits of Assessment Summary:

- Helps to predict the database growth with archived and without archived for the next 5 years.
- Enable to view the complete database assessment output and database growth in a single screen.

Data Assessment for Assessment Summary

Once ***Assessment Summary*** is selected in the ***Data Assessment*** screen, the ***Assessment Summary*** screen is displayed and select the data base from the Data Source drop to shown the data assessment run on that database as shown in the figure below.



The Assessment Summary screen is divided into four divisions and shows the graphical representation of various data assessments such as,

1. Database Size Snapshot Assessment Statistics
    - *Graphical representation*: Shows the size of database and schema, data distributed among different schemas existing in the database.
    - *Grid table*: Provides the consolidated details and elaborated information about the database size occupied by each schema in the database.
2. Archive Eligibility Summary
    - *Graphical representation*: Shows the Active rows/data size and In-active rows/data size according to the recent run of object level or top tables level data assessment.
    - *Grid table*: Provides the consolidated information associated to the Active rows/data size and In-active rows/data size according to the recent run of object level or top tables level data assessment.
3. Database growth forecast based on the top n tables for growth assessment.
    - *Graphical representation*: Analysis the database growth in business for next 5 years based on top 'N' tables and forecast the database growth with both archived data growth and non-archived data growth. It helps to predict the database growth in future.
    - *Grid table*: Provides the total size of archived data and non-archived data in the corresponding forecasted year.
4. Database growth forecast based on the retention policy.
    a. Archived and Non archived growth forecast for selected retention policy:
        - *Graphical representation*: Analysis the database growth in business based on the retention policy (i.e., number of years) applied and forecast the database growth with both archived data growth and non-archived data growth. It helps to predict the database growth in future. The graph varies based on the policy years selected in the ***Apply Retention Policy*** drop down.
            - As retention policy year increases the archived database size increases and vice-versa.
            - As retention policy year increases, the graph shows an increase in the Active data and decrease in the inactive data.
            - As retention policy year decreases, the graph shows the decrease in the Active data and increase in the inactive data.
        - *Grid table*: Provides the total size of archived data and non-archived data in the corresponding forecasted year.

b. Archive eligibility forecast for selected retention policy:

- *Graphical representation*: Shows the Active rows/data size and In-active rows/data size growth in the database based on the retention policy.
- *Grid table*: Provides the consolidated information associated to the Active rows/data size and In-active rows/data size growth in the database based on the retention policy.

- Provides flexibility to export the graphical representation of data assessment output into .pdf format.

4 Status Monitor

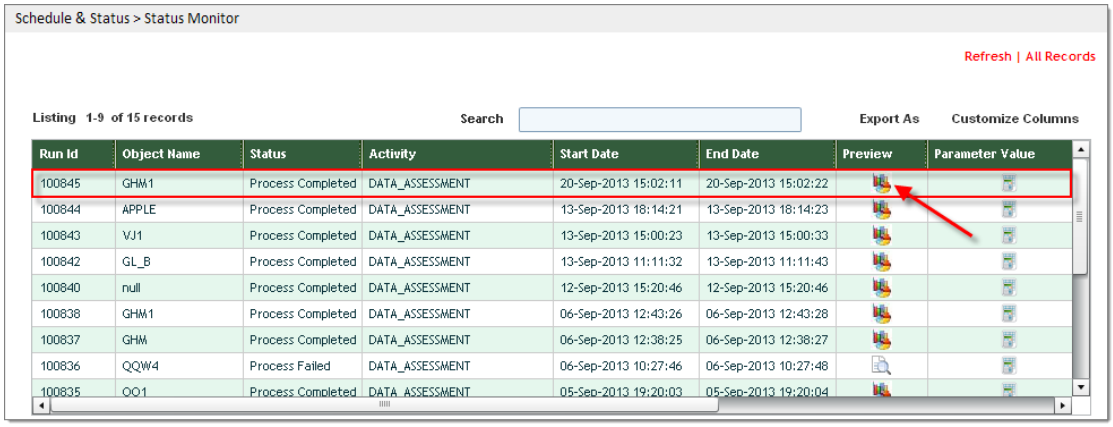
Status monitor serves as a dashboard to check the status of activities that have been executed. The function monitors the progress of jobs scheduled for run.

- It also gives a summary report of the jobs run.
- Status Monitor allows to monitor the progress of all the activities scheduled for executing in Solix EDMS Standard Edition (SE).
- Status Monitor also provides Previews, Job details, Log and so on.
- The Status Monitor displays the list of all the jobs run for execution along with details including status. In Status Monitor screen, refer to the Run IDs in the first column to locate a specific assessment job.

The status is shown as 'In Process' while the process is still in progress or has just initiated. On completion of data assessment process, the status of the corresponding activity will turns into 'Process Completed'.

4.1.1 Navigation

To access status monitor link, follow the path: ***Schedule & Status > Status Monitor.***



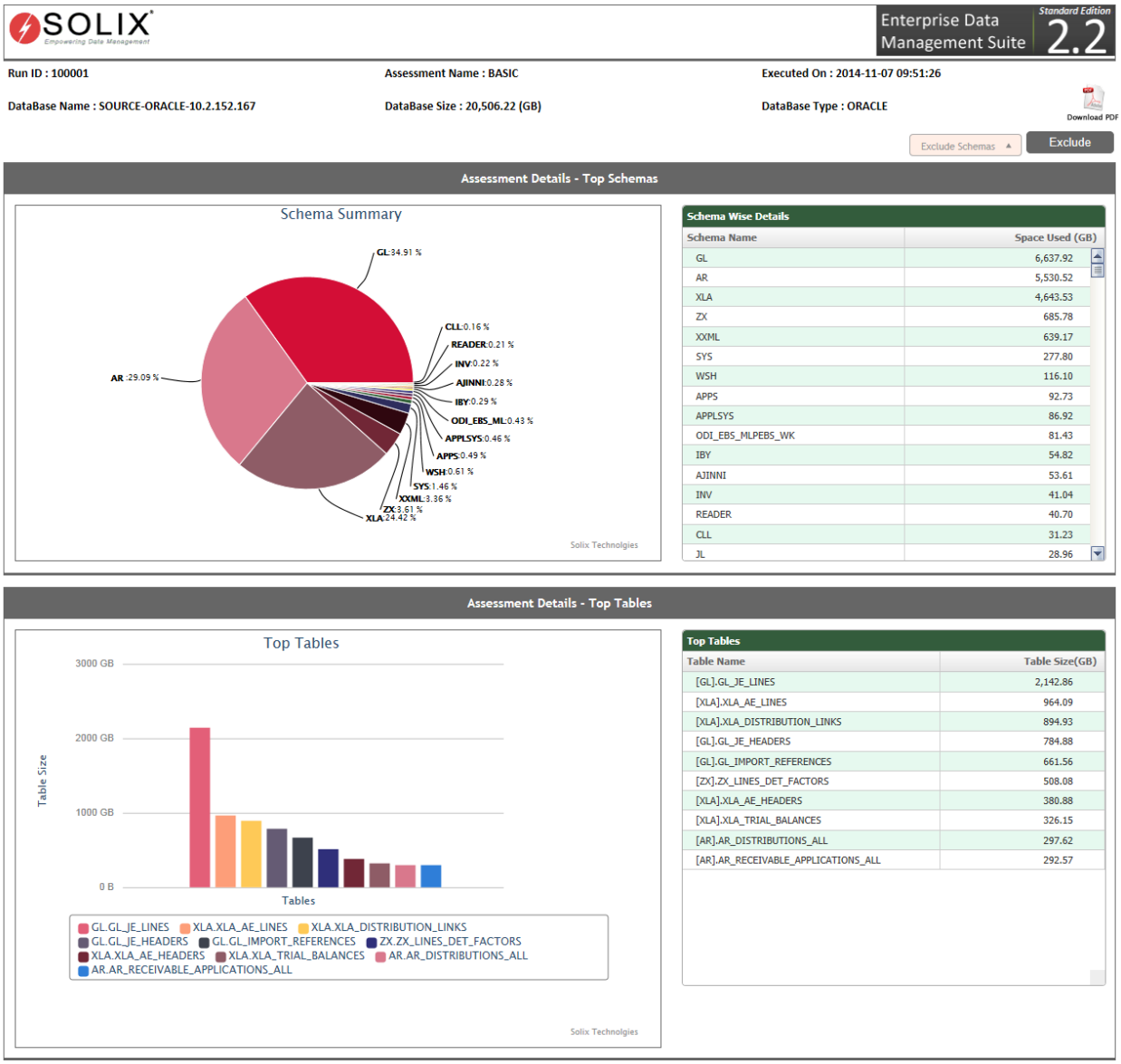
4.2 Preview

Once the status of data assessment turned into 'Process Completed', the user can be able to view the graphical representation of the respective data assessment. To preview the data assessment output, do the following:

- In ***Status Monitor*** screen, click ***Preview*** icon of the corresponding Run ID. The graphical presentation screen will be displayed with consolidated results of data assessment executed based on the criteria selected (i.e., data assessment type) in the data assessment process.
- Based the data assessment process type, the graph displayed in the Preview screen will varies accordingly, such as:

4.2.1 For Database Snapshot

Data assessment is executed on the selected database and provides a snapshot of the database size, data distributed among the schema in the database.

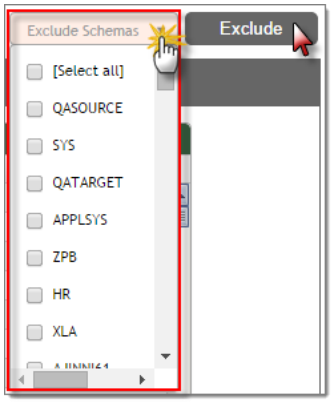


- *Graphical representation*: Shows the size of database, data distributed among the different schemas in the database, and size of each table in the Top N tables. (N- Represent number of tables) in graphical presentation.
- *Grid table*: Provides the consolidated details and elaborated information about the database size occupied by each schemas and Top N tables in the database.

  - Provides flexibility to export the graphical representation of data assessment output into .pdf format.

To exclude the schemas,

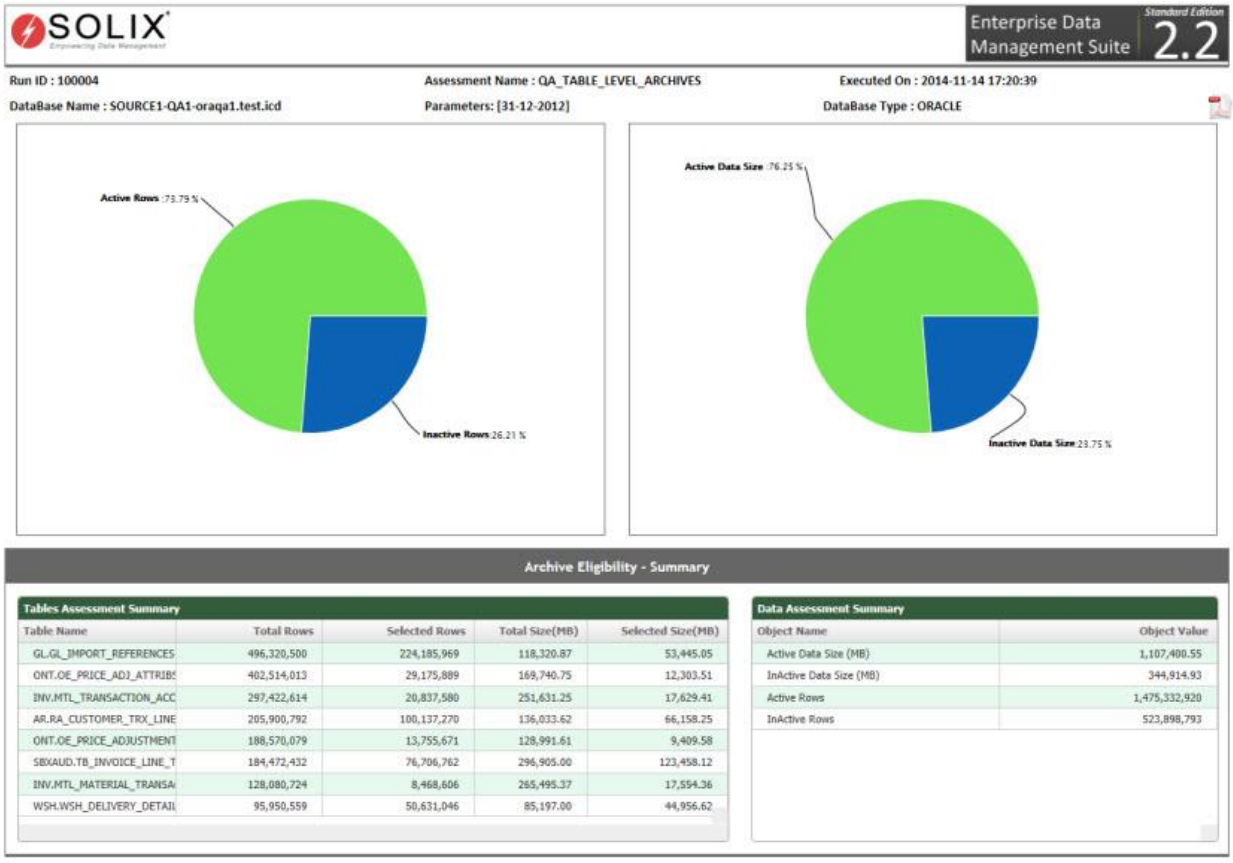
- Click ***Exclude Schemas*** drop down appears at the right-top corner of the dashboard, the drop down display the list of schemas available in the selected database. Select the checkbox of required schemas from the schemas available in the selected database and click ***Exclude*** button. The screen gets refresh and display the graphical representation and grid tab according to the data of schemas included in the data assessemnt.



  - Provides flexibility to export the graphical representation of data assessment output into .pdf format.

4.2.2 For Archive Eligibility (Criteria Based Assessment)

Data assessment is executed based on the criteria (i.e., Date) provided by the user and shows the percentage of active and inactive rows existing in the selected top tables.

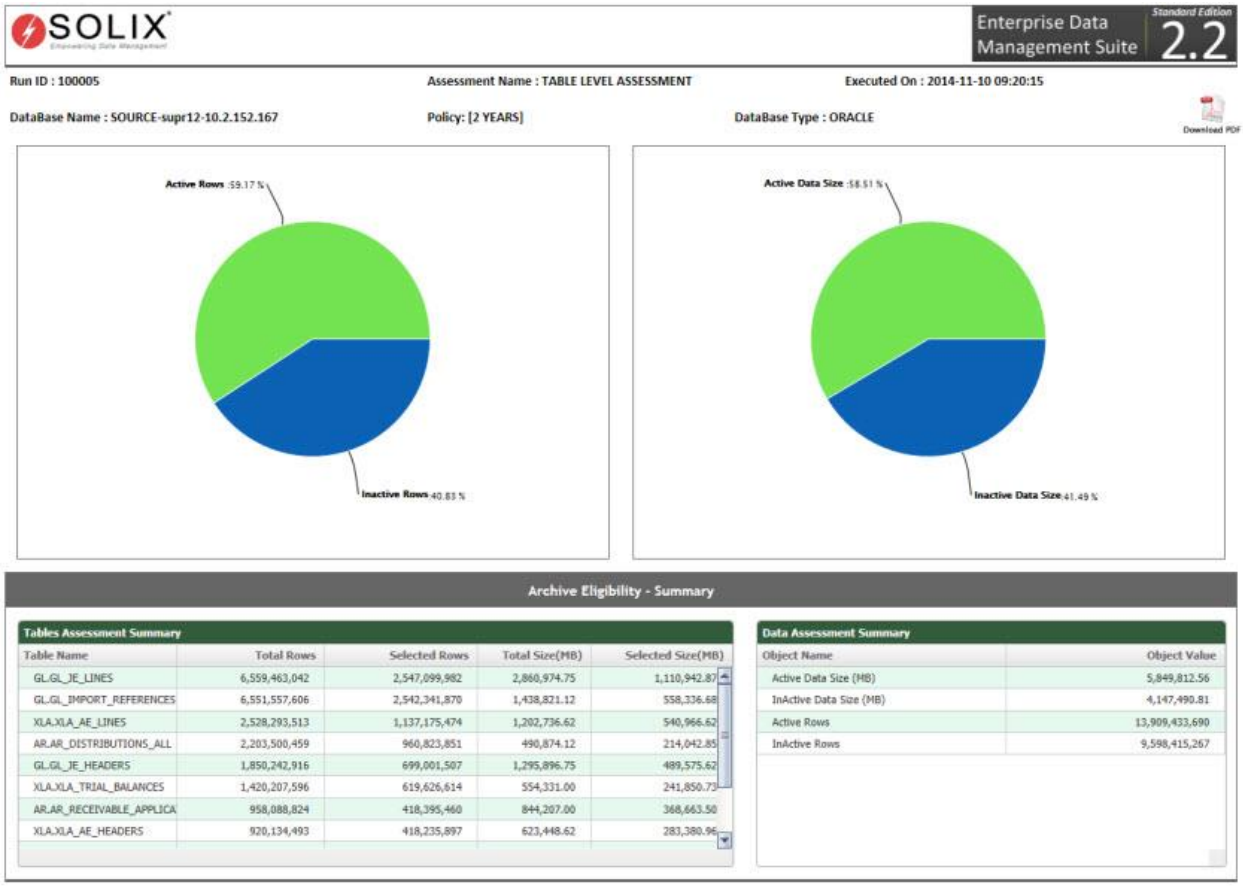


- Graphical representation shows the Active rows/data space and In-active rows/data space in the top tables.
- Grid tables provide the Table Assessment Summary and Data Assessment Summary.
  - *Table Assessment Summary*: Provides the detailed information associated to the Total rows, selected rows for eligibility, total space used and size of data space eligible within the Space Used in each top tables.
  - *Data Assessment Summary*: Provides the consolidated information associated to the Active rows/data space and In-active rows/data space of top tables.

- Provides flexibility to export the graphical representation of data assessment output into .pdf format.

4.2.3 For Archive Eligibility (Policy Based Assessment)

Data assessment is executed based on the retention policy applied on the selected top tables and shows the percentage of total active and inactive rows found during the retention in the selected top tables.



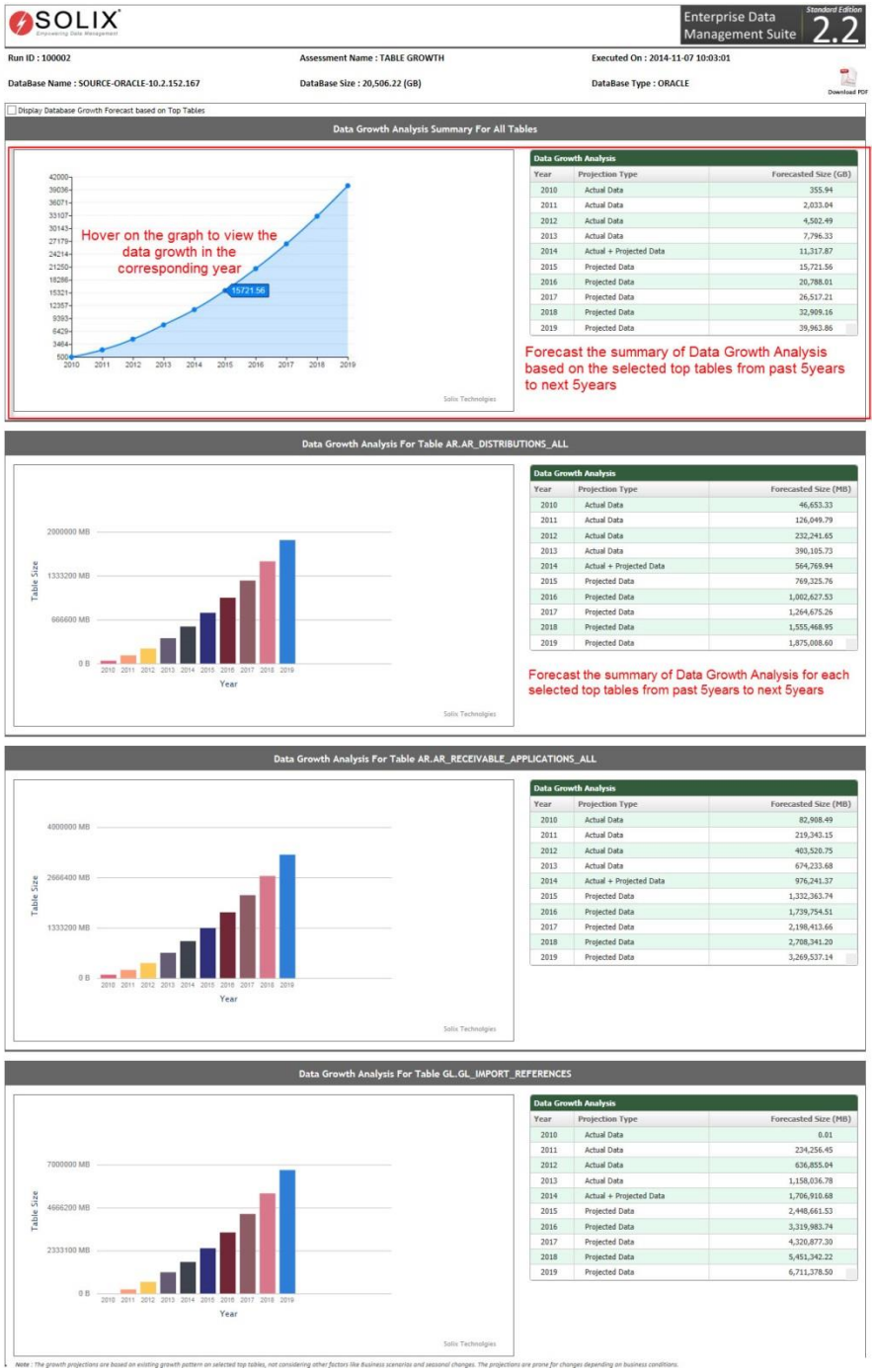
- Graphical representation shows the Active rows/data space and In-active rows/data space found in the top tables during the retention period.
- Grid tables provide the Table Assessment Summary and Data Assessment Summary.
  - *Table Assessment Summary*: Provides the detailed information associated to the Total rows, selected rows for eligibility, total space used and size of data space eligible within the Space Used in each top tables during the retention period.
  - *Data Assessment Summary*: Provides the consolidated information associated to the Active rows/data space and In-active rows/data space of top tables during the retention period.

- Provides flexibility to export the graphical representation of data assessment output into .pdf format.

4.2.4 Table Level Forecast

Data Assessment is executed on the selected tables and analysis the data growth of business based on the selected tables for past 5 years. Therefore predict the future data growth in those tables size for the next 5 years.

- It provides the consolidated summary of data growth for all the selected tables.
- Also provides the Data growth for each table in size.
- ***Display Database Growth Forecast based on Top Tables*** check box – enables to predict the future of database growth based on the top tables' growth. If check box is selected, an additional graph is shown in the figure.

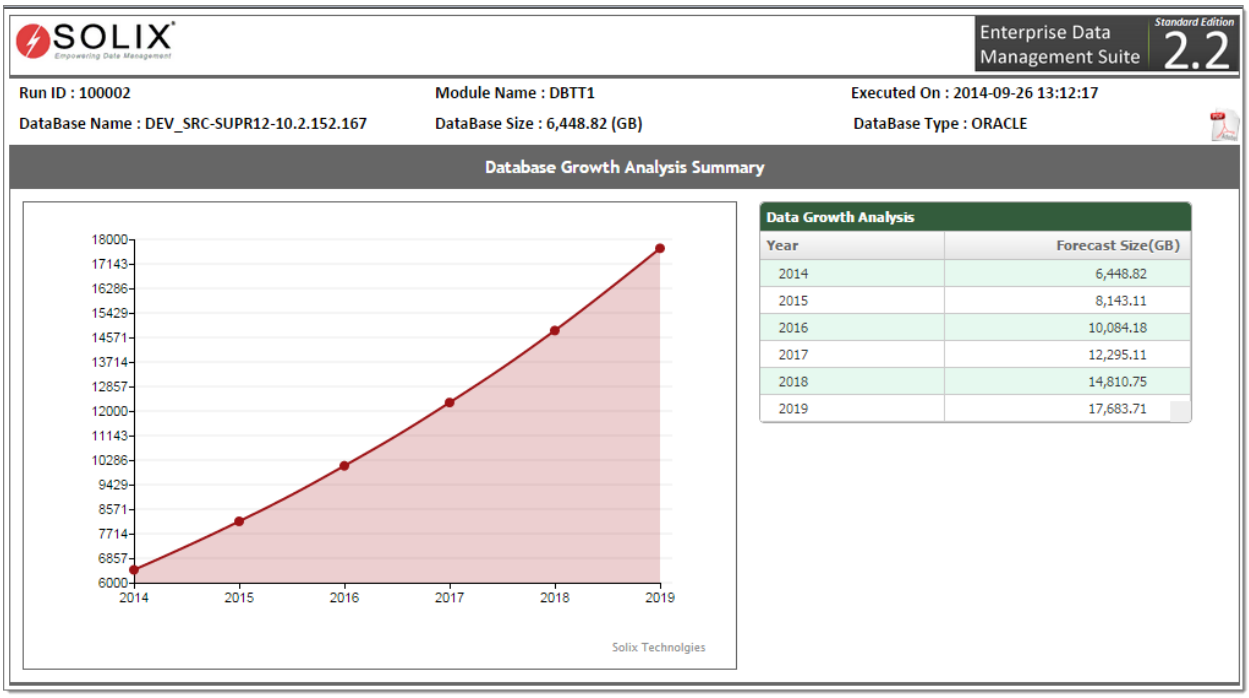


- *Graphical representation*: Analysis the data growth of the business based on the selected tables at table level / database level and shows the total data growth for all the tables and each table as well with a percentage in a graph from past 5 year to next 5 years. It is calculated based on the data growth encountered in the previous years.
- *Grid table*: Provide the total data growth for all the tables and each tables as well every year with a percentage and accurate size of data may increase in the database from past 5 year to next 5 years. The projection types differ based on the data in the database.
    - *Known*- implies that the data growth analysis is calculated based on the existing data of the tables in that year (i.e., past year) and forecasted the data growth.
    - *Partial Prediction* - implies that the data growth analysis is calculated based on the both existing data of tables (i.e., known data) and predicted data in that year and forecasted the data growth.
    - *Complete Prediction* - implies that the data growth analysis is calculated based on predicted data in future years and forecasted the future data growth (i.e., next year)

- Provides the flexibility to export the graphical representation of data assessment output into .pdf format.

4.2.5 Database Growth Analysis on Top Tables

Data Assessment is executed on the top tables in the database and analysis the data growth of based on the top tables. Therefore predict the future database growth based on top tables' data growth for the next 5 years.



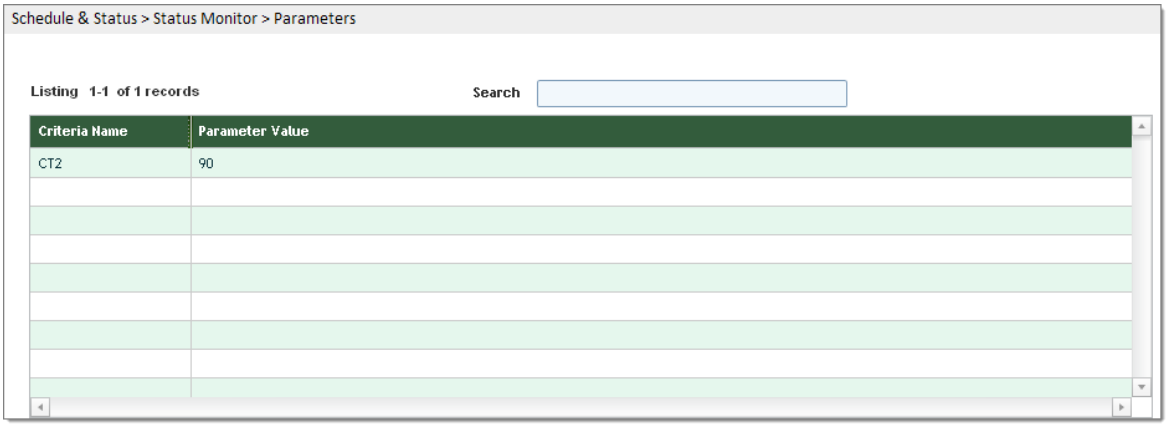
- *Graphical representation*: Analysis the data growth of the business based on the top tables in the database and shows the growth of data in business every year with a percentage in a graph for next 5 years. It is calculated based on the data growth encountered in the previous years.
- *Grid table*: Shows the growth of data in business every year with a percentage and accurate size of data may increase in the database for next 5 years.

- Provides flexibility to export the graphical representation of data assessment output into .pdf format.

4.3 Parameters

Once the status of data assessment turned into 'Process Completed', the user can be able to view the Parameter details of the respective data assessment. To view the parameter details, do the following:

1. In ***Status Monitor*** screen, click ***Parameter*** icon corresponding to the required Run ID, the ***Parameters*** window will be prompted as shown in the figure below.



2. The ***Parameters*** window shows the parameter information of the data assessment process such as Criteria Value and Parameter Value.

4.4 Log

Application Log captures the details of activities performed by users in Solix EDMS Data Assessment Standard Edition (SE), which may be used in the event of audit trail system recovery.

To view the Log details, do the following:

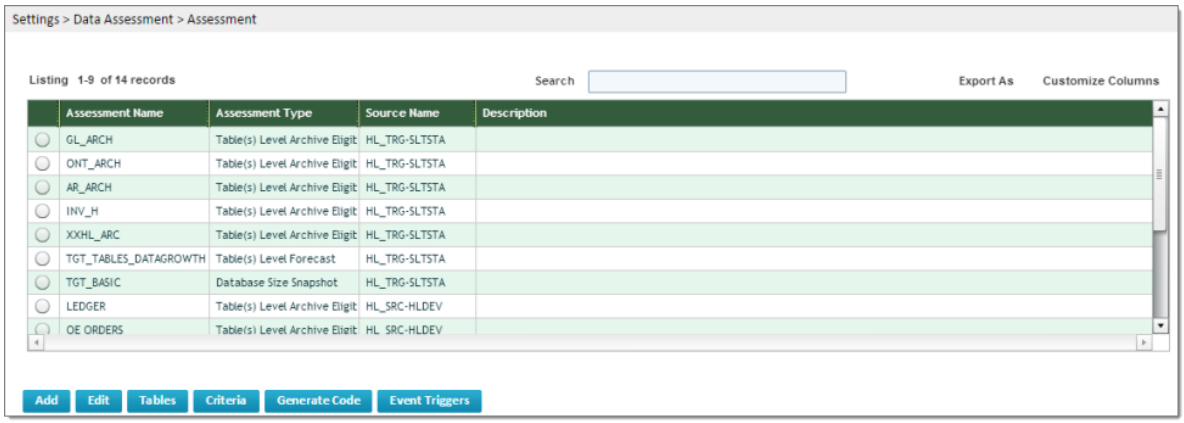
1. In ***Status Monitor*** screen, click ***Log*** icon corresponding to the required Run ID, the ***Log Details*** window will be prompted.
2. The ***Log Details*** shows the log information associated to the data assessment.

5 Editing the existing Data Assessment

Once the data assessment is created and executed successfully, it will be automatically appended in the Data Assessment screen (Setting > Data Assessment > Assessment). Henceforth, Solix EDMS Standard Edition (SE) provides feasibility to edit the data assessment details effectively. This section illustrates the process to modify the details in the existing data assessment.

To edit the existing data assessment, do the following:

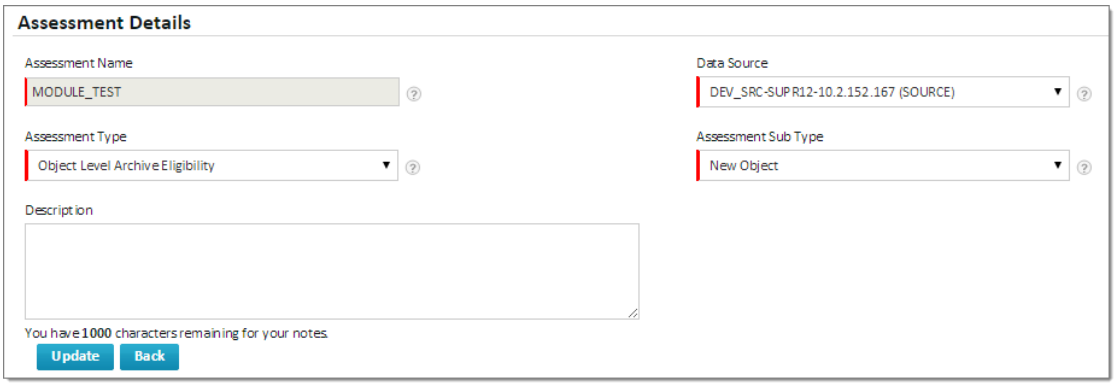
- Navigate to the following path: Setting > Data Assessment > Assessment. The Assessment screen will be displayed as shown in the figure below.



5.1 Editing Data Assessment details

To edit the data assessment details, do the following:

1. In Assessment screen, select the intended data assessment and click Edit button to edit the data assessment details. The Assessment Details screen will be displayed as shown in the figure below.



2. Make the necessary changes and click Save button, to save the modified information. Once the details are updated successfully, a message stating “Data Assessment Details Updated Successfully” will be prompted in the screen.

- The fields marked as | are mandatory fields.

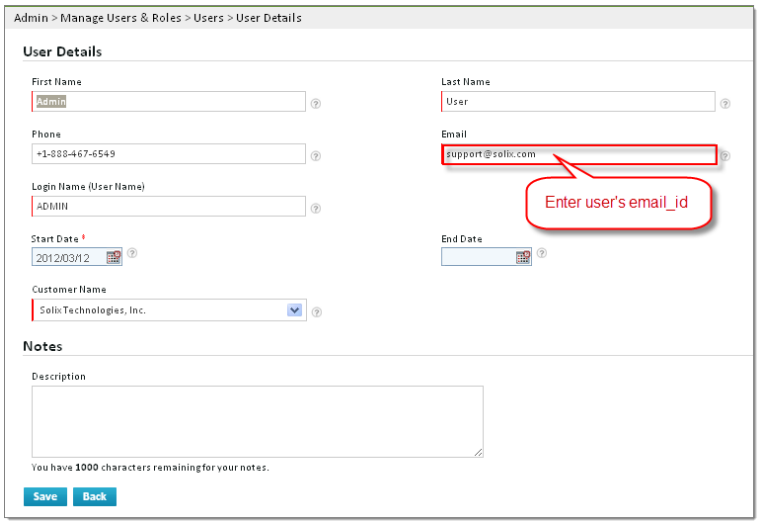
- Assessment Name is a non-editable text field.

6 Change Password

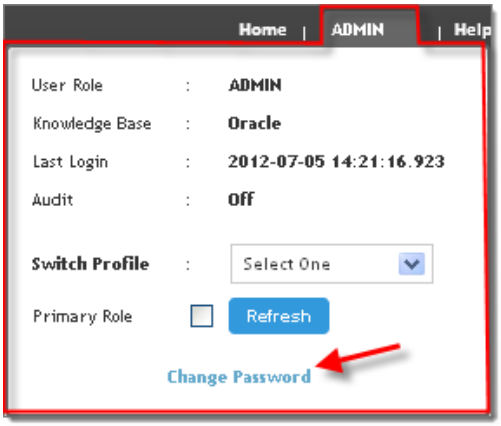
The default User ID and pass word provided by Solix Technologies logs the user in as an Admin user.

To change password:

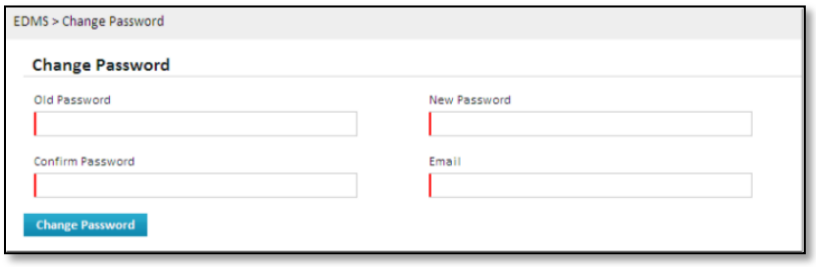
1. Login to the Solix EDMS Standard Edition (SE) using the authenticated user name and password.
2. When user wants to change the password for the first time, it is mandatory to change the default email-id provided by Solix in order to send new password to the email-id specified by the user. To change user email-id,
    a. Navigate to the following path: ***Admin> Manage Users & Roles > Users***. The ***User*** screen will be displayed.
    b. Select radio button adjacent to Admin and click ***Edit*** button. The ***User Details*** screen with the information associated to admin user will be displayed as shown in the figure below.



    c. Enter email-id of the user in the ***Email*** text box.
    d. Click ***Save*** button, to update the user information.
3. Once email_id of the user is changed, click on ***Role*** (by default-ADMIN) which appears at the top right corner of screen as shown in the figure below.



4. In ***Role Popup*** window, click ***Change Password*** hyperlink to change the password. The ***Change Password*** pop-up window will be displayed as shown in the figure below.



   a. Enter current password in the ***Old Password*** text field.

   b. Enter the new password in the ***New Password*** text field.

   c. Re-enter the new password in the ***Confirm Password*** text field.

   d. Enter the email-id of the user in the ***Email*** in the text field to send the confirmation mail.

   e. Click ***Change Password*** button. A message stating that "***Password is changed successfully***" appears and the confirmation message would be sent to the email address specified by the user.

- The field marked as are mandatory fields.
- It is mandatory to enter the email address of the user in the ***User Details*** screen only when the password is changed for the first time.