

Implementations - Data Storage Details

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Customer Data Storage

Customer data is the lifeblood of our customers and should thus be treated with the utmost respect. How we treat that data while in our possession is how we show that respect. The following guidelines will help inform you of how a customer's data should be treated while it is in our care.

What constitutes customer data?

- Any data on a customer's site that we are connected to remotely
- Any data relating to the customer found on our cloud servers
- SQL Backup, Excel, CSV, PDF, TXT File, or any other format that is sent to us from a customer containing their customers information
- Any form of customers names, addresses, contacts, programing, panels, zone lists, etc.

Data Security - Customer Data should never be...

- Left out in the open
 - On discs, thumb drives, portable hard drives, or any other portable data storage medium.
 - All removable media should be returned to the project managers as soon as it is loaded onto your machine/vm
- Taken off premises
 - Don't take copies of any data home with you or out of the building.
 - Remote access through the secure VPN is allowed for working with the data remotely

Data Storage Details

- Upon receipt of data from a customer enter the [data_storage_details spreadsheet](#)
 - This spreadsheet can be found in teams, or in the link above
 - Under that Data Conversion Team group chat
 - Files
- Enter the first three columns
 - The customer that this data is for
 - The files you received
 - The date you received them
- The 30, 60, 90, 120 day dates will be calculated for you as soon as you input a date, and are color coded to help

illustrate how long to keep the data

Data Storage Time Concerns

- We should never keep a customers data for longer than 120 days during the project
- Post Go-Live we only keep a customers data for 90 days
- If you are actively working with a customer on a conversion then a new source cut should be obtained every 3-4 months at the longest
- Once a customer has gone live or the merge has been performed, or the custom report delivered you can enter the date on the 2nd tab of the spreadsheet and it will keep track of the 90 day window

Data Deletion

- Remove all backups and source files, spreadsheets, pdfs, etc.
- Detach and delete the files of the SQL database
- Erase all thumb drives, portable hard drives, other portable data storage devices, etc.
- Shred any printed documents pertaining to the conversion
- Make sure to empty your recycle bin.