



EBOOK

Everything You Need to Know About Archiving Data in Salesforce

Reducing storage costs and streamlining operations

INTRODUCTION

Salesforce serves as a business hub for many organizations. It's likely your single largest container of data. And for companies that have been using the platform for a while, that amounts to thousands of records.

Properly managing this massive amount of information becomes more difficult—and more intimidating—as the volume grows. However, a hierarchy exists between the different types of data. What are the least-used types of data? Is there information that is outdated or unnecessary?

Auditing your Salesforce data with the hopes of deleting vast amounts of information can be a dead end. For those in regulated industries, there might even be requirements for how long this data needs to be maintained. So what can you do with Salesforce data that can't be deleted but isn't essential to the daily functionality of your environment?

Data archiving is an essential function that reduces data storage costs and streamlines processes. If you're wondering how it works and what you gain by data archiving, this will give you the basics to get started.

Here are 7 things you need to know about archiving data in Salesforce:

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01

What Is Archived Data?

WHAT IS ARCHIVED DATA?



Data archiving refers to the process of identifying data that is no longer used, moving it out of the production system, and putting it into long-term storage. Archived data is still accessible to your organization, but moved out of the way so it doesn't clog up your Salesforce environment with unnecessary data.

Companies choose to archive data for a variety of reasons. First, let's consider an essential aspect of a complete data security strategy: frequent backups of system data.

Reducing the amount of data in your live environment increases the speed of your backup and recovery tool. Eliminating unused data from your system lightens the lift for these tools and makes your system more flexible.

The retention period, or length of time your long-term storage holds onto this information before removing it from your system completely, is configurable in your archival tool. Certain types of data must be maintained for compliance reasons and other types may simply be kept on hand in case they are needed for business processes.

While they can be confused with each other, data backups and data archives are entirely different things. Archives serve as data repositories for information that isn't critical but must be retained, while a backup is a duplicate copy of critical data, which doesn't impact the original files. The absence of the extracted archived data doesn't affect normal operations.

02

Risks of Not Archiving Data



RISKS OF NOT ARCHIVING DATA

Ignoring a problem only makes it worse. And the longer data in your Salesforce environment goes unaddressed, the more difficult it will be to clean up your system.

Salesforce data storage is incredibly expensive. Failing to archive unnecessary data costs an enormous amount of money until an organization finally takes the time to reduce its data.

And the ROI a company sees from its Salesforce instance isn't the only thing that suffers when data is not archived. The performance of the system lags. Large volumes of data slow down response times in live environments, negatively impacting user experience and team member productivity.

Data quality is much more difficult to maintain when your team isn't easily able to identify important data. Its focus becomes watered down. Data can become outdated, duplicated, or incomplete, leading to inaccurate reporting, poor decision-making, and customer dissatisfaction.

Data backups are a critical aspect of properly maintaining your Salesforce environment. Unnecessarily large amounts of system data slow down these processes and make it more difficult to recover after an outage. Speedy recoveries are essential to minimize the harmful effects of a data loss event; recovering unneeded data makes this process more lengthy and costly.



Slow Response Times



Impacted User Experience



Outdated, Duplicated, and Incomplete Data



Reduced Team Member Productivity

03

Data Archives Streamline Business Processes →

DATA ARCHIVES STREAMLINE BUSINESS PROCESSES

A responsive system enables your team members to quickly find the information they need. Any delay in computing time becomes compounded with each repetition. And when your team is running processes in your Salesforce environment all day every day, even a small delay adds up over time.

A Salesforce DevOps pipeline aims to produce reliable applications and updates as efficiently and confidently as possible. Streamlining operations is built into the strategy and any failures to do so result in a lower ROI for every project.

Archiving data helps grease the wheel for operations such as this. The system as a whole needs to function smoothly. If it's clogged with unused data, everyone who interacts with it will experience problems.

IT considerations are often left to the IT team. But in reality, it's the business side of an organization that benefits the most from an optimized technological infrastructure. Sourcing the best applications and hardware goes a long way toward accomplishing this, but general upkeep also needs factored into the equation.

Think of archiving data like getting out-of-season clothing out of your closet. Sure, you'll want to wear your sweaters again one day, but they're of no use in the middle of the summer. And once they're out of the way, you can see your t-shirts more easily.

04

The Impact on Data Security



THE IMPACT ON DATA SECURITY

The cybersecurity landscape is constantly evolving, and it's only getting more dangerous to do business. Cyberthreats continue to become more intimidating. Businesses need to take every possible precaution to protect their systems, sensitive data, and IT platforms. Failing to do so can result in costly outages, falling out of compliance with data security regulations, and loss of consumer trust.

We've discussed how data archiving helps streamline business operations, but this housekeeping function also supports a stronger data security strategy.

Properly protecting your data hinges on two broad considerations: your ability to reinforce your platform against hackers, and your ability to manage internal data sets. Guarding login screens and instituting security barriers address the first consideration. Maintaining proper oversight of how your data is being handled and stored supports the second.

It's easier to manage smaller sets of data compared to large, unorganized repositories. Data archiving helps you clean up and better understand the health of your Salesforce data. And once you have this understanding of your data, you can begin the process of organizing and securing it.

Data archiving is not the secret key to data security. But cleaning up your system by deleting and archiving old data is an essential aspect of the process. It should be an early step in a comprehensive approach to a successful data security strategy.



05

Compliance Considerations



COMPLIANCE CONSIDERATIONS

Financial institutions, healthcare companies, government agencies, insurance companies—there are a variety of industries that handle their customers' most sensitive information. And depending on where these companies are located and the customers they serve, they must adhere to multiple data security regulations with strict directives about how this sensitive data is handled and stored.

Data that sits unused in a Salesforce environment may still need to be maintained, even if it doesn't serve an immediate business need. Many regulations require organizations to retain certain types of data for specific periods of time, and failing to comply can result in significant penalties and legal liabilities.

Sensitive information must be protected in data archive in the same way it can be protected in a data backup. Long-term storage will exist outside of the Salesforce environment which provides its own set of protections. Beyond that, tactics like encryption, anonymization, and pseudonymization can be used to further guard sensitive data.

Data archiving can also help organizations demonstrate compliance by providing a record of data retention and management practices. This can be particularly important in the event of an audit or investigation, where regulators may require evidence of compliance.

06

How Do I Archive Data?



HOW DO I ARCHIVE DATA?

There are two main steps to archiving data:

1. Deciding what to archive
2. Moving it from a live environment to long-term storage

Sorting through massive amounts of data in your Salesforce environment can be very intimidating. And while its possible to perform this process manually, using an automated tool significantly expedites the process and saves your team members a lot of time.

AutoRABIT Vault offers automated scans of your Salesforce environment to assess the health of your data. This includes factors such as identifying data that hasn't been accessed in a long time, which data is used the least, and which data is leveraged most.

Reports with these delineations can be used to prioritize the importance and necessity of existing data sets. And anything that is not immediately necessary, but still important enough to avoid deleting, can then be archived.

That means moving this data into long-term storage. Once again, you have the choice of doing this manually, or with the help of an automated tool. Vault assists with archiving this data and can even be configured to encrypt it for further protection. The retention time can also be set.

Taking the time to thoroughly plan your approach before carrying it out with automated tooling will ensure the best results.

07

Continuous Monitoring Is Essential



CONTINUOUS MONITORING IS ESSENTIAL

Data archiving isn't a one-time consideration. It needs continually reassessed and maintained to guarantee the ongoing health of your Salesforce data. The benefits listed above are only possible when data cleanliness is a constant priority.

Establish a procedure that ensures your archived data is periodically checked and verified to be accurate, complete, and secure. This includes a process to ensure your data archiving strategy is revisited and refined over time.

Ensuring data accuracy, regulatory compliance, disaster recovery capabilities, and efficient use of storage space are important considerations that must be monitored. This can be done more efficiently by using automated tools to evaluate data integrity and analyzing reports such as access logs to see how data is being used.

Any anomalies or issues detected through these tools and reports should be investigated immediately. Failing to properly protect your archived data can result in falling out of compliance with regulatory requirements or exposing sensitive information.

The goal is to ensure the accuracy, completeness, and security of your archived data while streamlining functionality in your live Salesforce environment.

“Fantastic tool, addresses every major pain point commonly encountered with multiple environments and development streams on Salesforce.”

- ERNESTO VALDES

CONCLUSION

Managing Salesforce data can be a huge undertaking, especially if it hasn't been addressed for a long time. This information will eventually be outdated or outright unusable after a certain period of time. And if you don't stay on top of the proper handling of this data, it can quickly become unmanageable.

Archiving data that is unused, but still important, helps an organization stay compliant with applicable regulations, clean up its Salesforce environment, and reduce overhead costs. Streamlined operations and faster processes improve the experience for everyone working within the platform.

AutoRABIT Vault not only facilitates the movement of this data to long-term storage and provides essential protective functionalities, but it also helps an organization maintain a contemporary view of the health of its data repositories. Automating these processes reduces errors, increases speed, and avoids bogging down team members with repetitive, laborious tasks.

Data archiving is an essential aspect of properly managing your Salesforce data. And when it's done correctly, the benefits extend to every aspect of your Salesforce environment.

ABOUT AUTORABIT

AutoRABIT is a DevSecOps suite for SaaS platforms, which automates and accelerates the entire application development and release lifecycle. This enables continuous integration and delivery by providing fast, simple, and secure end-to-end automation across all Salesforce implementations. AutoRABIT tools help enterprises achieve higher release velocity and faster time to market.

AutoRABIT features static code analysis, automated metadata deployment, version control, advanced data loading, orgs and sandbox management, test automation, and reporting. Its services complement and extend Salesforce DX.

AutoRABIT Vault is a comprehensive backup and recovery solution that streamlines Salesforce data, simplifies data backup challenges, offers disaster recovery, and provides endpoint data protection in the cloud.

CodeScan gives Salesforce developers and administrators full visibility into code health from the first line written through final deployment into production, along with automated checks of Salesforce policies.

Record Migrator enables automatic bundling of all feature dependencies for Salesforce-managed packages. The deployment of templates ensures fast, efficient, and seamless releases.

Visit us at www.autorabit.com to learn more.



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“AutoRABIT has helped us add a lot of automation to our software development lifecycle. I highly recommend it!”

- FORREST COOK