



Note Purge Report

Note_Purge.dnax

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Overview:

The Note Purge application creates a report of any notes in the database that fit within the criteria of the parameters, with an option to delete them. This can range from all notes into system, to all notes between a given date range, to all notes created by an individual. Nine parameters allow for a wide variability for deletion options. This application creates a CSV report that shows the list of rows that would be affected by the deletion given the parameters. The report can be run on demand, and the number of notes returned in the report determines the runtime.

Key Benefits:

This application allows a financial institution to easily document, delete and purge notes from their database through DNA.

Processing:

As a default, this application selects all notes in the database and produces a report of them. As parameters are added, the selection of notes is narrowed down. When the user has the desired notes and sets the RPT parameter to 'N', these notes will be deleted and the activity tables will be updated accordingly.

Parameters:

Parameter	Code	Description (how used)	Required	Default
Account Closed ThruDate	ACTD	The after date parameter, when filled, will pull notes with a create date equal to or past the parameter date. i.e. A date of 01-01-2017 will pull notes from the date 01-01-2017 up till present day	No	None
Effective Date	EFF	The thru date parameter, when filled, will pull notes with a create date from the first date in the system up to the parameter date. i.e. A date of 01-01-2017 will pull notes before and up to the date 01-01-2017	No	None

Parameter	Code	Description (how used)	Required	Default
RptOnly_YN	RPT	This app generates a report no matter what. If this parameter is set to 'Y' then it will not delete those notes from the database. If this parameter is set to 'N' then it will delete the notes that are generated in the report and log them in the activity table.	Yes	Y
Class	CLAS	The CLAS parameter is an optional parameter to include only notes with a given class code or class codes. Comma delimited option: CLAS1, CLAS2, CLAS3	No	None
Exclude Sub Class Code	EXSU	The EXSU parameter is an optional parameter to <i>exclude</i> notes with a given class code or class codes Comma delimited option: EXSU1, EXSU2, EXSU3	No	None
Message Text	MSG	Keyword or list of keywords/phrases that would cause a note in the report to <i>not</i> be deleted, despite fitting the other parameter criteria. Comma delimited list of keywords or phrases to save. The phrases cannot involve commas, as commas are the delimiter between multiple options in this parameter. Note: A value found in the MAOA field will produce a value of "N/A" in this MSG field in the report created since it has priority Comma delimited option: keyword1, keyword2, phrase3	No	None

Parameter	Code	Description (how used)	Required	Default
Match ANY or ALL	MAOA	<p>Keyword or list of keywords/phrases that would cause a note in the report to be deleted no matter what (even if the 'do not delete keywords' are found)</p> <p>Comma delimited list of keywords or phrases to delete. The phrases cannot involve commas, as commas are the delimiter between multiple options in this parameter.</p> <p>Comma delimited option: keyword1, keyword2, phrase3</p>	No	None
Subclass	SBCL	<p>The SBCL parameter is an optional parameter to include only notes with a given subclass code or codes.</p> <p>Comma delimited option: SBCL1, SBCL2, SBCL3</p>	No	None
Person(s) to Include	PERS	<p>This parameter is an optional parameter to include only notes that were created by the person with the given PersNbr</p>	No	None

Variables:

None.

Scheduling and re-run information (for batch applications):

The application can be run any time for any date range.

Report (s):

Below is a sample of the report created by this application.

	A	B	C	D	E	F	G	H	I	J	K	L
1	NoteNbr	Create Date	CreatePersNbr	Note Text	Inactive Date	Date Last Maintained	Note Class	Note Sub Class	Create Date Time	Save Keyword Found	Delete Keyword Found	Will Delete
2	157	10/19/2000	1137	MAJOR STOCKHOLDER		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
3	158	10/19/2000	26380	MR BLANK IS A MAJOR STOCKH		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
4	159	10/19/2000	1165	NANCY SHEA IS A MAJOR STOC		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
5	160	10/19/2000	1138	BOARD		10/19/2000	NOTE	DFLT	10/19/2000	N	Y	Y
6	161	10/19/2000	26414	PLEASE DO NOT		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
7	162	10/19/2000	26414	PLEASE DO NOT		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
8	163	10/19/2000	26414	PLEASE DO NOT		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
9	164	10/19/2000	26414	IF YOU ENCOUNTER ANY PROB		4/4/2001	NOTE	DFLT	10/19/2000	N	N	Y
10	165	10/19/2000	26414	PLEASE DO NOT		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
11	166	10/19/2000	26414	PLEASE DO NOT		10/19/2000	NOTE	DFLT	10/19/2000	N	N	Y
12	171	10/20/2000	1141	I AM TRYING TO FIGURE THIS O		10/20/2000	NOTE	DFLT	10/20/2000	N	N	Y
13	176	10/31/2000	26373	TEST ACCOUNT OF THE OSI TRA		10/31/2000	NOTE	DFLT	10/31/2000	N	N	Y
14	181	11/3/2000	26419	EXAMPLE OF		11/3/2000	NOTE	DFLT	11/3/2000	N	N	Y
15	182	11/6/2000	26414	TAMI IS THE DAUGHTER OF THE		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
16	183	11/6/2000	1179	SUZANNE IS THE DAUGHTER OF		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
17	184	11/6/2000	26416	CRYSTAL IS THE DAUGHTER OF		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
18	189	11/6/2000	26416	BORROWERS FINANCIALS DUE		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
19	186	11/6/2000	1157	YADDAYADDA		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
20	187	11/6/2000	26416	WATCH HER ACCOUNTS		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
21	188	11/6/2000	1179	THIS IS A VERY SPECIAL CUSTO		11/6/2000	NOTE	DFLT	11/6/2000	Y	N	N
22	190	11/6/2000	26414	CUSTOMER MIGHT COME IN TC		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
23	191	11/6/2000	1179	CUSTOMER		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
24	192	11/6/2000	1134	CALL TO SEE HOW SHE LIKES HE		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
25	193	11/6/2000	1134	OSI EMPLOYEE.		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
26	194	11/6/2000	1134	SOLICIT MORTGAGE!		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
27	195	11/6/2000	1134	VIP.NO SERVICE CHARGES TO A		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
28	196	11/6/2000	26419	OSI TEST ACCOUNT DO NOT CL		11/6/2000	NOTE	DFLT	11/6/2000	N	N	Y
29	197	11/7/2000	1157	PAYMENTS TO		11/7/2000	NOTE	DFLT	11/7/2000	N	N	Y

Field Listing:

Field	Description
NoteNbr	The NoteNbr of the note
Create Date	The date the note was created
CreatePersNbr	The PersNbr of the person who created the note
Note Text	The note text of the note
Inactive Date	The date the note became inactive (may not apply)
Date Last Maintained	The last date the note was modified or edited
Note Class	The Class Code of the note
Note Sub Class	The Sub Class Code of the note
Create Date	The date the note was created
Save Keyword Found	Y/N flag for if any of the keywords to save the note were found Will show N/A if the Delete Keyword is found, because it no longer matters if the Save Keyword is found
Delete Keyword Found	Y/N flag for if any of the keywords to definitely delete were found
Will Delete	Y/N flag for if after all the computing is done, whether the note will be deleted

Additional Requirements:

Configuration Checklist:

Item	Test Environment	Production Environment
Parameters		

Revisions:

Date	App Version #	Change
1/13/2020	1.0.0.1	Application Created