Contents

1. Overview

This guide provides process flows for using the system archiving function. As of version 6.4 and forward, the Purge obsolete data function of End of Period allows archiving data to separate archive database tables as an alternative to deleting the data. You can decide which data to archive, which data to delete completely (like the original purge functionality), or to never remove the data.

The Table Management screen provides a choice-list box for each data area that was previously supported through purge. Any existing data has been converted to the new structure. If the prior setting for a data area was 0 days (meaning no purge), then the new setting is set to NEVER REMOVE. If the prior setting for a data area was a number of days greater than zero, then the new setting is set to DELETE.

To use the new archiving feature, follow the steps in the sections below.

Requirements

- Oracle client and server installed
- Blank database created for the archiving instance
    - Full database can be used, or a pluggable database can be used if you have Oracle 12c. Oracle 12c is recommended.

2. Archiving Setup Steps

To archive data:

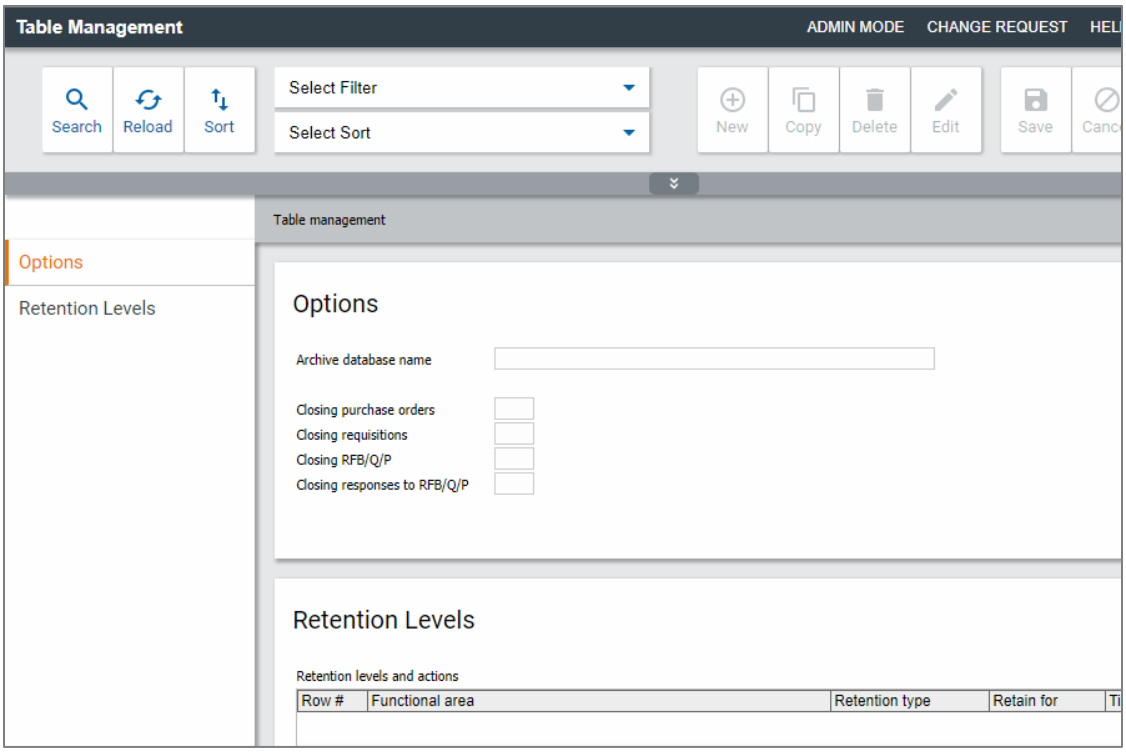
1. Decide if you will be using the production instance or a separate database instance for archiving data. We recommend using a separate instance. Please note that steps are different between a separate or production instance to archive data.
2. Execute the appropriate scripts from the DB Objects\DBInit folder to create the archiving table space on the archive target database by.

    Note: This process is similar to creating table spaces during the initial database creation on a new database.

    Important: The process varies between Oracle or MSSQL.

    - **Oracle users:** Please continue to the Oracle - Use Product Files to Create Users and Tablespace for Archiving section.
    - **Microsoft SQL users:** Please continue to the MSSQL - Create and Configure the Archive Database section.

3. Open the Table Management screen and set the data according to how you want to delete or archive data based on the functional areas.



   - When the archive database is a separate instance from the production database, fill in the **Archive database name** field on the Options tab to set the database target name (this is either the TNS or ODBC name). If using archiving in the production instance, you may leave this field blank. The closing options on the Options tab behave the same as before.

     For more information on the closing options, refer to the help page on the Table Management screen Options tab.

   - Set the **Functional area** options with the **Retention type** values of **NEVER REMOVE**, **DELETE** or **ARCHIVE**. Also set the amount of time to retain items in the **Retain for** and **Time unit** fields. **Time unit** value can be **DAYS**, **MONTHS** or **YEARS**. If the retention type is changed to **DELETE** or **ARCHIVE**, the **Retain for** value must be greater than zero.

4. Execute the **convert.bat** file against the production database. This file is found in the DBObjects folder (the same convert.bat file used in the upgrade process).

   The archive conversion process occurs (creates the tables, modifications, etc.).

   Note: When adding a new functional area to archiving, you must re-run **convert.bat**.

3. Archiving Data

Run the **Purge obsolete database entries** option on the End of Period screen.

For more information on using the **Purge obsolete database entries** options, refer to the help for the End of Period screen.

If any errors occur during the purge process, the processing stops and provides an appropriate error pointing you to the sqlerr.log.

Appendix A. Oracle - Use Product Files to Create Users and Tablespace for Archiving

To create an archiving database on a separate or production instance, follow the steps outlined in this section.

Important: Steps for using the product files to create users and tablespace differ for 32-bit and 64-bit Windows platform.

- For 32-bit Windows platforms, please follow the steps below in the Using product files to create users and tablespace – 32 bit Windows section.
- For 64-bit Windows platforms, please skip to the Using product files to create users and tablespace – 64 bit Windows section.

A.1 Using product files to create users and tablespace – 32 bit Windows

1. Confirm that the new Oracle directory exists under DBinit - 10i.
2. Confirm that there are two files for archiving. There should be two files for either separate instances or the production instance. These files must be included in FAArchive to install Oracle.

   Separate instance:

   - DBinit\ora10i\fa-archive.bat
   - DBinit\ora10i\create-fa-archivets.bat

   Production instance:

   - DBinit\ora10i\fa-archive-production.bat
   - DBinit\ora10i\create-fa-archivets-production.bat
3. Run the appropriate separate or production instance **.bat** to create tablespaces and security. The command line syntax is:

Separate instance: > fa-archive <path> system/<password>@<sid>

Where:

<**path**> is where the database files are located, and where the .SQL files were copied.
<**password**> is the Oracle system password.
<**sid**> is the archiving instance Oracle System ID (SID).
Example: fa-archive c:\faarchive system/AssetWorks@faarchive

Production instance: > fa-archive-production <path> system/<password>@<sid>

Where:

<**path**> is where the production database files are located.
<**password**> is the Oracle system password.
<**sid**> is the production instance SID.
Example: fa-archive-production c:\faarchive system/AssetWorks@faarchive

4. After the **.bat** file completes, check the create tablespaces log file for errors.

A.2 Using product files to create users and tablespace – 64 bit Windows

1. Create a shortcut to the Windows 32 bit DOS command program.
2. Double-click the shortcut to launch the Windows 32-bit command prompt.
3. Navigate to the DBInit\ora10i directory, and perform the rest of the steps described below.
4. Confirm that there are two files:

   Separate instance:

   - DBinit\ora10i\fa-archive.bat
   - DBinit\ora10i\create-fa-archivets.bat

   Production instance:

   - DBinit\ora10i\fa-archive-production.bat
   - DBinit\ora10i\create-fa-archivets-production.bat

   These files must be included in FAArchive to install Oracle.

5. Run the instance **.bat** to create tablespaces and security. The command line syntax is as follows:

Separate instance: > fa-archive <path> system/<password>@<sid>

Where:

<**path**> is where the database files are, and where the .SQL files were copied.

<**password**> is the Oracle system password.

<**sid**> is the archiving instance Oracle System ID (SID).

Example: fa-archive c:\faarchive system/[CompanyName]@faarchive

Production instance: > fa-archive-production <path> system/<password>@<sid>

where:

<**path**> is the path of the production database files.

<**password**> is the Oracle system password.

<**sid**> is the production instance SID.

Example: fa-archive-production c:\faarchive system/[CompanyName]@faarchive

6. After the **.bat** file completes, check the create tablespaces log file for errors.

Appendix B. MSSQL - Create and Configure the Archive Database

Follow these instructions to create the database on the database server. Different scripts are used if the archive database is a separate instance or the production instance as shown below.

1. Open the appropriate **.sql** file based on the archiving instance:
   - **Separate instance:** Open the **proto_archive.sql** file in either the

     DBObjects\dbinit\100 (Microsoft SQL Server 2008), or
     DBObjects\dbinit\110 (Microsoft SQL Server 2012) folders.
   - **Production instance:** Open the **proto_archive_production.sql** file in either the

     DBObjects\dbinit\100 (Microsoft SQL Server 2008), or
     DBObjects\dbinit\110 (Microsoft SQL Server 2012) folders.

     ⚠ Important: If you are creating the database for Microsoft SQL 2008, or 2012, be sure to run the files using the directions from the \100, or \110 directory, as appropriate.

- For a separate instance only, the **proto_archive.sql** file includes an important setting that initializes the Microsoft SQL 2008 or 2012 database for archiving.

2. If the path is incorrect, edit the file to reflect the actual path.
   - **Separate instance:** Set the path for the archiving instance. Then, on each drive that stores the archive database, create a folder called proto, and another folder within proto called faarchive (proto\faarchive).

     Note: You may also set the database name in the script as necessary (for example, faarchive instead of proto).

   - **Production instance:** Set the path to be your production path.

   Warning: Do not change the names of the file groups. Changing these names will cause future upgrades to fail.

3. To create the asset management system file groups and the database, type the following in a command prompt in either the DBObjects\dbinit\100 (Microsoft SQL Server 2008) or the DBObjects\dbinit\110 (Microsoft SQL Server 2012) folder:

   Separate Instance: proto_archive sa <password> <server name>

   where

   <**password**> is the SA password

   <**server name**> is the SQL server name (when using Microsoft SQL Server version 2008 or 2012).

   Production Instance: proto_archive_production sa <password> <server name>

   where

   <**password**> is the SA password

   <**server name**> is the SQL server name (when using Microsoft SQL Server version 2008 or 2012).

   This procedure creates the following:

   - The archiving file groups in which you will create the database objects.

     Note: For the separate instance, this procedure also creates the following:

     - The database (Proto) - or the database name you specified in the script.
     - An event log called **proto.log**.
     - Two new Microsoft SQL server logins with passwords (emsdba, with password emsdba; and emsview, with password emsview).

⚠ Important: Do not change the emsdba password.

4. Examine the proto.log created in the step above for errors. If any exist, contact Customer Care.
5. When the instance is a separate instance than production, you must also run the **emsapp_create.bat** against the archiving database. This creates the users necessary for archiving. This file is found in either the DBObjects\dbinit\100 (Microsoft SQL Server 2008) or the DBObjects\dbinit\110 (Microsoft SQL Server 2012) folder
6. Continue creating the ODBC data source as outlined in the next section.

Appendix C. MSSQL - Create the ODBC Data Source

⚠ Important: Steps to create the ODBC data source differ between 32-bit and 64-bit Windows platforms.

For Windows platforms, please follow the steps below in: Create ODBC Data Source – 32 bit Windows.

For 64-bit Windows platforms, please skip to the section: Create ODBC Data Source – 64 bit Windows.

C.1 Create ODBC Data Source – 32 bit Windows

The following steps apply to the Microsoft ODBC driver: consult the Microsoft documentation for detailed steps or more information.

1. Verify that the ODBC driver is installed on the App server for your version of Microsoft SQL Server.
2. Go to Windows Control Panel >System and Security>Administrator Tools and open **ODBC**.

   If you are installing the application as 32-bit on a Windows 64-bit platform, create a shortcut to the Windows 32-bit ODBC Data Source Administrator as follows:

   - In Windows Explorer, navigate to **<system drive>\Windows\SysWOW64**
   - Search for **odbcad32.exe.** The odbcad32.exe name is the same for 64- and 32-bit installation shortcuts. The folder location determines the proper ODBC program. Use the SysWOW64 folder link only if you are using a 64-bit version of Windows but installing the application as 32-bit.
   - In the search results, right-click **odbcad32.exe** and select **Send to > Desktop**.
   - Open the ODBC Shortcut you have just created.
3. Click the **System DSN** tab and then click **Add**.

4. Choose **SQL Server Native 10.0** (for SQL Server 2008 driver), or **SQL Server Native 11.0** (for SQL Server 2012 driver) and then click **Finish**.
5. In the **Name** field, type the database name (DB Name).
6. In the **Server** field, type the computer name of the database server and then click **Next**.
7. Select **With SQL Server authentication using a login ID and password entered by the user**.
8. In the **Login ID** field, type **emsdba**.
9. In the **Password** field, type **emsdba** and then click **Next**.
10. To select the default database, select **Change the default database to** and then select <DB name> from the list.
11. Click **Next** twice and then click **Finish**.
12. Click **Test Data Source**.
13. Click **OK** after the tests have completed successfully.

C.2 Create ODBC Data Source – 64 bit Windows

The following steps apply to the Microsoft ODBC driver. Consult the Microsoft documentation for detailed steps or additional information.

1. Verify that the ODBC driver is installed on the App server for your version of Microsoft SQL Server.

   The **odbcad32.exe** name is the same for the 64- and 32-bit installations. The folder location determines the proper ODBC program. On a 64-bit system if installing the application as 64-bit, the native ODBC link will work for running as 64-bit: **\system32\odbcad32.exe.** Otherwise, if you are installing the 32-bit application on a 64-bit platform, you must follow instructions under the Create ODBC Data Source – 32 bit Windows section instead.

2. Launch Windows 64-bit ODBC Data Source Administrator.
3. In the ODBC Data Source Administrator dialog box, click the **System DSN** tab, and then click **Add**.
4. In the Create New Data Source dialog box, choose **SQL Server Native 10.0** (for SQL Server 2008 driver), or **SQL Server Native 11.0** (for SQL Server 2012), and then click **Finish**.

   The Create a New Data Source to SQL Server dialog box appears.

5. In the **Name** field, type the Database Name (DB Name).

6. In the **Server** field, type the computer name of the database server (for example, fleet_server), and then click **Next**.
7. Select **With SQL Server authentication using a login ID and password entered by the user**.
8. In the **Login ID** field, type **emsdba**.
9. In the **Password** field, type **emsdba**, and then click **Next**.
10. To select the default database, select **Change the default database to**, and then select <DB Name> from the list.
11. Click **Next**, then click **Finish**.
12. Click **Test Data Source**.
13. After the **Tests Completed Successfully** message appears, click **OK.**