Solix EDMS Data Archiving Standard Edition (SE) 2.2

Quick Reference

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1 Solix EDMS Data Archiving Standard Edition (SE)

Solix EDMS Data Archiving Standard Edition (SE) is a process of moving data that is no longer actively used to a separate data storage device for long-term retention. Data archives consist of historical data that is still important and necessary for future reference, as well as data that must be retained for regulatory compliance. Data archiving platforms like Solix EDMS Data Archiving Standard Edition (SE) provide data access so that data can be retrieved easily whenever needed.

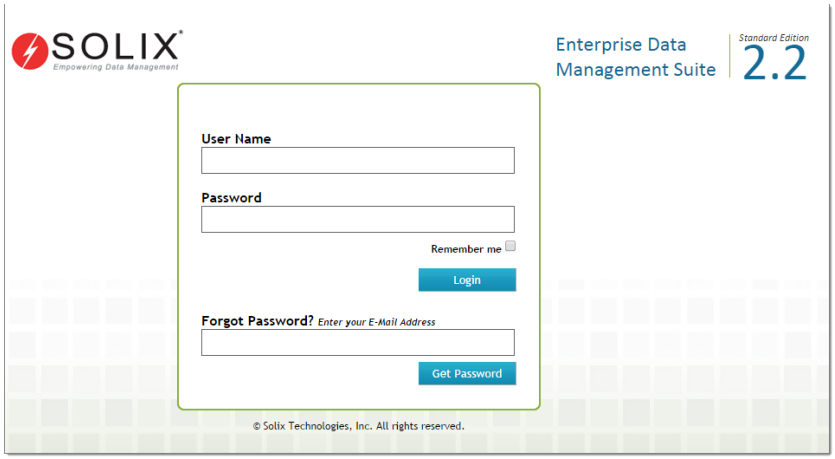
1.1 Benefits of Solix EDMS Data Archiving Standard Edition (SE)

- Archiving optimizes storage and improves application performance.
- It mitigates risk by reducing the amount of data exposed to potential problems.
- It cuts the cost of storage by decreasing the amount of data on expensive Tier 1 disks significantly.
- It meets compliance requirements by preserving data in a read-only format while supporting data visualization through standard reporting tools.

- Current version of Solix EDMS Data Archiving Standard Edition (SE) supports Oracle Database (9i, 10g, and 11g), SQL Server (2005 and 2008) and Sybase ASE (15.5).
- Solix EDMS Data Archiving Standard Edition (SE) does not support special data types such as "'BLOB','CLOB','LONG','LONG RAW', 'RAW', 'BFILE', 'XML', 'IMAGE', 'BINARY', 'VARBINARY', 'BIT', 'BINARY_FLOAT', 'BINARY_DOUBLE', 'NCLOB', 'TEXT', 'NTEXT', 'UNITEXT' etc.

1.2 Startup Solix EDMS Standard Edition (SE) Application

Once the Solix EDMS Standard Edition (SE) software is installed successfully, access the application to perform data archiving process. 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 (SE).***
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, the authorized features will populates in the home screen respectively.

2 User Management

User management handles the comprehensive information of the user and knowledgebase in the Solix EDMS Standard Edition (SE) application, which enable the user to create instant custom configurations efficiently. To setup a configuration and perform validation process, firstly the user must be registered in the application and be, assigned a user role. The user must define a knowledgebase to access the metadata in the database (both source and target database). Also, the user should have thorough knowledge of the relationships among the selected tables while creating the configurations. Inappropriate configurations may result in nullified data relationships in the tables or loss of referential integrity.

This chapter outlines the procedure to setup users, define source & target database, define a knowledgebase and assign user to the knowledgebase. Also, it navigates through the process to create a knowledgebase (KB) in the Solix EDMS Standard Edition (SE) application successfully. The topics included are listed below:

- User Creation
- User Role Creation.
- KB Source & Target Definitions
- KB Definition
- KB Assignments

To perform administration activities, click  bar appears on the left hand side of the screen. Once the bar is clicked, the administrative menus will be opened on the screen as shown below.

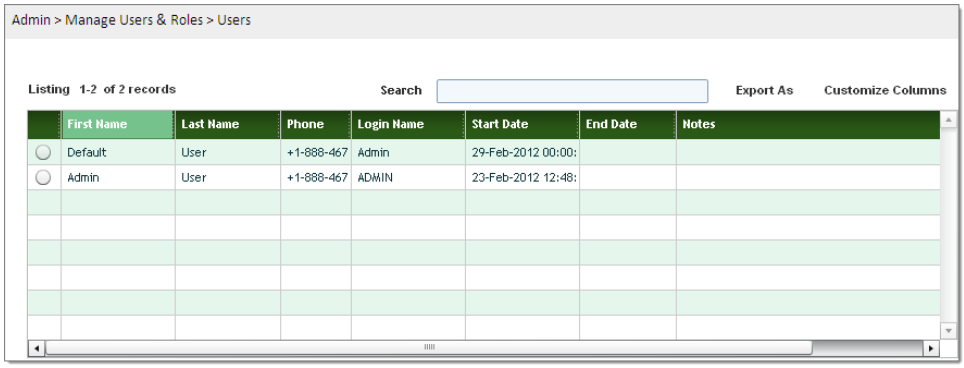
2.1 User Creation

User should be registered in the Solix EDMS Standard Edition (SE) application to access / perform validation process. This feature enables the user to add/edit the user information in the Solix EDMS Standard Edition (SE). This section illustrates the process to create and manage the user information.

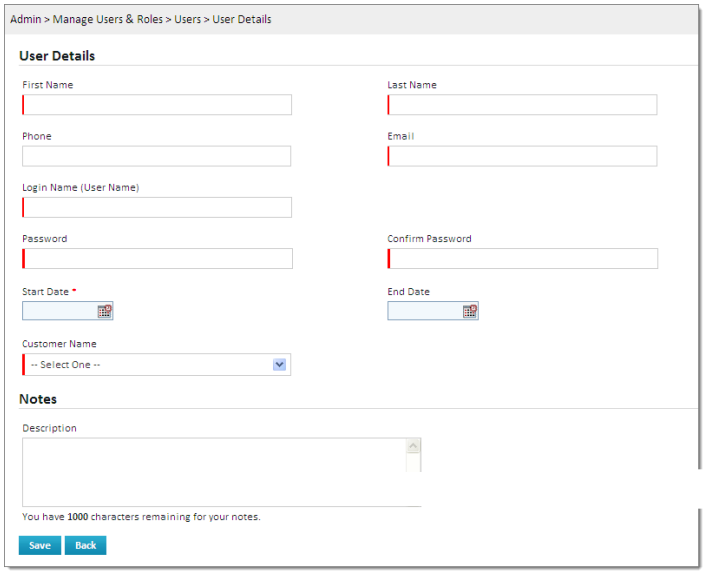
2.1.1 Creating User

To create a new user, do the Following:

1. Place cursor at ***Admin*** tab in the main menu. The list of submenus incorporated in in the Admin menu is displayed.
2. Select ***Manage Users & Roles*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***Users*** option from the drop down. The ***Users*** screen with the list of existing users will be displayed as shown in the figure below.



4. To create a new user, click ***Add*** button. The ***User Details*** page will appear where the information corresponding to the user can be entered as shown in the figure below.



5. In the ***User Details*** screen, do the following:

a. Enter first name and last name of the user in the corresponding text fields.

b. Enter contact number of the user in the ***Phone*** text field.

c. Enter email-id of the user in the ***Email*** text field. Enter user name or login name of the user in the ***Login Name (User Name)*** text field.

d. Enter the password of the corresponding username in the ***Password*** text field.

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

- In both ***Username*** and ***Password***,
  - Minimum of three characters must be entered.
  - Both upper and lower cases are allowed.
  - Spaces are not allowed in between the characters in Username.
- Special characters are not allowed in the Username. Only alphabets, underscores "_" and numeric characters are allowed. The first character must be alphabet.
- Alpha-numeric characters and special characters are allowed in passwords.

f. Enter ***Start Date*** in the corresponding field by selecting a date from the ***Calendar***.

g. Enter ***End Date*** in the corresponding field by selecting a date from the ***Calendar***. End Date should not be less than Start Date.

h. Select a ***Customer Name*** (i.e., name of the Client Organization) from the corresponding drop-down list.

i. Click ***Save*** button. Once the information is saved successfully, the message "***User is saved. Please go to KB Assignments and assign a KB to the User.***" will be prompted on the screen.

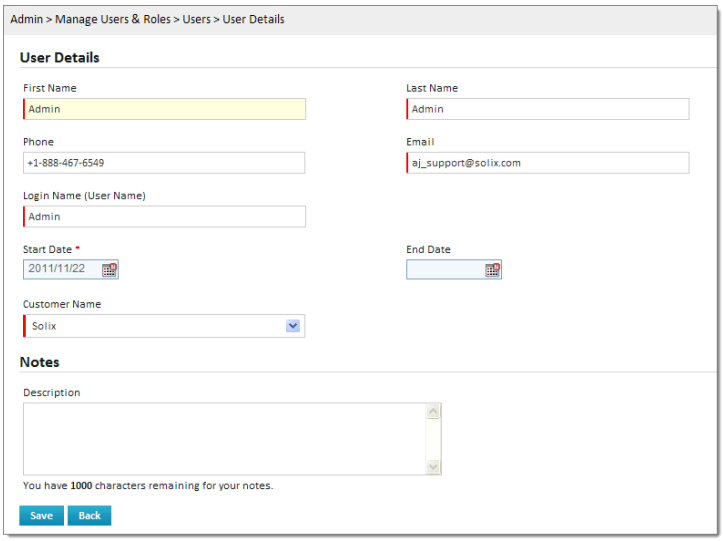
- If the details provided are invalid, a warning message will be prompted.
- If the login user name already exists, then the user will not be created and a message "***User Name Already exists. Please try giving some other name*** "will be displayed.

- The field marked as " "are mandatory fields.
- To select date from the ***Calendar***, click the adjoining icon .
- If the user is already created but the user role is not assigned to the respective user, then the Solix EDMS Standard Edition (SE) will restrict the user to login to the application even though the user id is valid.
- The user is not allowed to access the Solix EDMS Standard Edition (SE) application before the specified start data and after the specified end date.

2.1.2 Editing an Existing User

This section explains the process to edit the information of the existing user which is defined during user registration in the application. To edit an existing user, do the following:

1. Place cursor at ***Admin*** tab in the Solix EDMS Standard Edition (SE) main menu. The list of submenus is displayed.
2. Select ***Manage Users & Roles*** option from the submenu. A list of options is displayed in the drop down.
3. Click ***Users*** option from the drop down. The ***Users*** screen with the list of existing users will be displayed.
4. From the users list, select the radio button adjacent to the desired user.
5. Click ***Edit*** button. The ***User Details*** page with the information corresponding to the selected user will be displayed as shown in the figure below.



6. In the ***Edit User Details*** screen, do the following:
    a. Make the necessary changes in the required fields.

b. Click ***Save*** button, to save the modified information. A message stating "**User is Updated**" will be prompted on the screen.

- The fields marked as and * are mandatory fields.
- To select date from the ***Calendar***, click the adjoining icon .
- To return to the ***Users*** list screen from ***Add / Edit Details*** screen, click ***Back*** button.

2.2 User Role Creation

Once the user is created in the application, the user is restricted to access the Solix EDMS Standard Edition (SE) application until a role is assigned to the user, even though the user is a valid user. This feature enables the user to define a role which can be assigned to new/existing user. This section explains the process to add and manage the user role information.

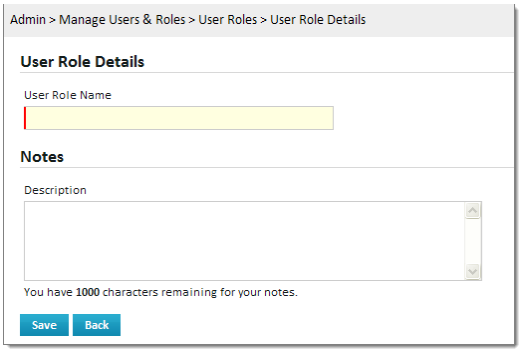
2.2.1 Navigation

To access ***User Roles*** link, login to Solix EDMS Standard Edition (SE) and follow the path*:* ***Admin > Manage Users & Roles > User Roles.***

2.2.2 Add a User Role

To add a new user role, do the following:

1. Place cursor at ***Admin*** tab in the Solix EDMS Standard Edition (SE) main menu. The list of submenus is displayed.
2. Select ***Manage Users & Roles*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***User Roles*** option from the drop down. The ***User Roles*** screen with the list of existing user roles is displayed as shown in the figure below.
4. Click ***Add*** button. The ***User Role Details*** screen appears which allows the user to enter the information corresponding to the user role.



5. In ***User Role Details*** screen, do the following:
    a. Enter the name of the user role in the ***User Role Name*** text field.
    b. Enter comments associated to user role in the ***Notes*** text field.
    c. Click ***Save*** button. Once the information is saved successfully, a confirmation message will be prompted on the screen.

- The fields marked as and * are mandatory fields.
- If the user role name already exists, a warning message about duplicate name will be prompted in the dialog box.

2.2.3 Editing an Existing User Role

To edit an existing user role, do the following:

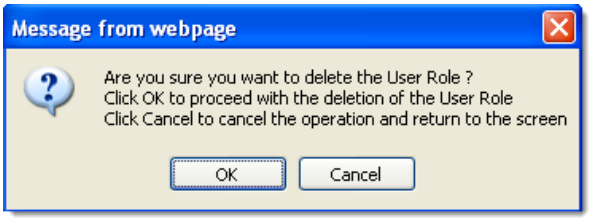
1. From the user roles list screen, select the radio button adjacent to desired user role.
2. Click ***Edit*** button. The ***User Role Details*** screen with the information corresponding to the selected user role will be displayed.
3. In ***Edit User Role Details*** screen, do the following:
    a. Make the necessary changes in the required fields.
    b. Click ***Save*** button, to save the modified information. Once the modified information is updated successfully, a confirmation message will be prompted.

- The fields marked as and * are mandatory fields.
- If the details provided are invalid, a warning message dialog box will be prompted
- To return to the ***User Role list*** screen from ***Add / Edit Details*** screen, click ***Back*** button.

2.2.4 Deleting User Role

To delete the user role, do the following:

1. In the ***User Roles*** page, select the radio button adjacent to the desired user role in the list.
2. Click ***Edit*** button. The ***User Role Details*** screen with the information corresponding to the selected user role will be displayed.
3. To delete the user role, click ***Delete*** button. A message stating that ***"Are you sure you want to delete the User Role?"*** will be prompted as shown in the figure below.



- Click ***Ok*** button, to delete the ***User Role***.
- Click ***Cancel*** button, to deny the deletion.

- User roles which have already been assigned to the user cannot be deleted.

2.3 KB Source Target Definition

For the data archiving process, it is mandatory to ensure the connectivity details associated with the source and target databases. This feature is designed to register the source or target database machine details in order to build the connectivity between both the databases while performing any activity in the Solix EDMS Standard Edition (SE) such as data archiving and so on.

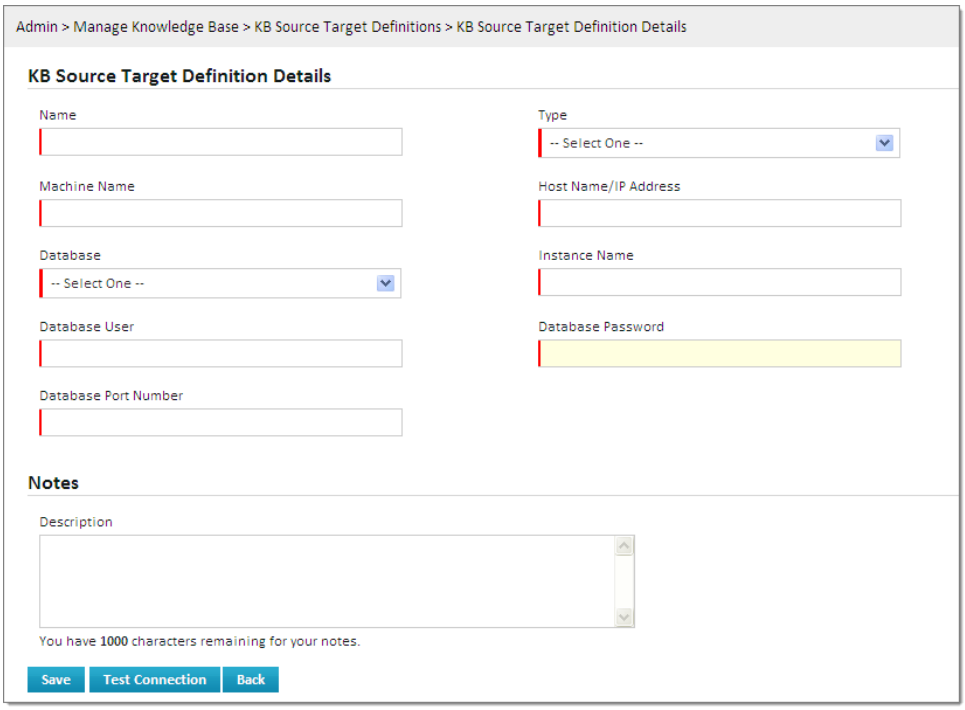
2.3.1 Navigation

To access ***KB Source Target Definitions*** link, login to Solix EDMS Standard Edition (SE) and follow the path: ***Admin > Manage Knowledgebase (KB) > KB Source target Definitions.***

2.3.2 Add New KB Source Target Definitions

To add a new KB source target definition, do the following:

1. Place cursor at ***Admin*** tab in the main menu. The list of submenus will be displayed.
2. Select ***Manage Knowledgebase (KB)*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***KB Source Target Definitions*** option from the drop down. The ***KB Source Target Definitions*** screen with the list of existing KB source target definitions will be displayed.
4. Click ***Add*** button, to add new source or target in the knowledgebase. The ***KB Source Target Definition Details*** screen appears where the information corresponding to the KB source target definition can be entered.



5. In ***KB Source Target Definition Details*** screen, do the following:

a. Enter the ***Name*** in the corresponding field.

b. Select the ***Type (Source or Target)*** from the corresponding drop down list.

c. Enter the ***Machine Name*** in the corresponding field.

d. Enter the ***Host Name/IP Address*** in the corresponding field. Here, the user can provide either hostname or IP Address.

e. Select ***Database*** (i.e., Oracle) from the corresponding drop-down list.

f. Enter ***Instance Name*** in the corresponding field.

g. Enter ***Database User*** in the corresponding field.

h. Enter ***Database Password*** in the corresponding field.

i. Enter ***Database Port Number*** in the corresponding field.

j. Enter the comments in the ***Notes***.

k. Click ***Save*** button. Once the KB source or target is saved successfully, a confirmation message will be prompted on the screen.

l. Once the KB source or target is saved successfully, in order to verify the database connection click ***Test Connection*** button.

- Based on the KB source or target details provided, if the database is connected successfully, then a message indicating the successful connection to the database will be prompted on the screen.
- Based on the KB source or target details provided, if the connection to the specified database fails, an alert message will be prompted on the screen.

- The field marked as " " are mandatory fields.

Fields	Functionality
Name	Define a unique name of the KB source or KB target database.
Type	It enables the user to define whether the knowledge is associated to the source or target database.
Machine Name	This text box enables the user to define the machine name of server associated to ***Type*** selected (i.e., source or target).
Host Name / IP Address	This text box enables the user to define the host name of server associated to ***Type*** selected or IP address associated to the source or target database. Here, the user is provided an option to enter either hostname or IP Address.

Fields	Functionality
Database	This drop down enables the user to select the type of database (i.e., Oracle).
Instance Name	It allows the user to provide the instance name/service name of the source or target database.
Database User	It enables the user to enter the database user name of the source or target database.
Database Password	It enables the user to enter the database password corresponding to the given username of the source or target database.
Database Port Number	It enables the user to specify the port number of the source or target database.
Notes	It facilitates the user to enter the description associated to the KB source or KB target database.
Save	This button is deployed to verify the source or target database connectivity. If the given details are valid, the connectivity will be established and saved.
Test Connections	This button is deployed to verify the connectivity to the specified database. • If the given details are valid, the database connectivity will be established and saved. • If the given details are not valid, the database connectivity fails and alerts the user to verify the details.
Back	This button is employed to navigate to the previous screen from current screen.

2.4 KB Definitions

Once the source or targets database information is registered in Solix EDMS Standard Edition (SE), the user should define a knowledgebase associated with the connectivity of source and target database to perform the archiving process effectively. This feature enables the user to create a knowledgebase and define the source and target for the respective KB. Solix EDMS Standard Edition (SE) is capable of populating metadata information of custom tables available in databases (i.e., source and target) into the respective knowledgebase automatically. Also, it maintains tables, columns, table relations and joins created in application which are used to build configuration to perform data archiving process.

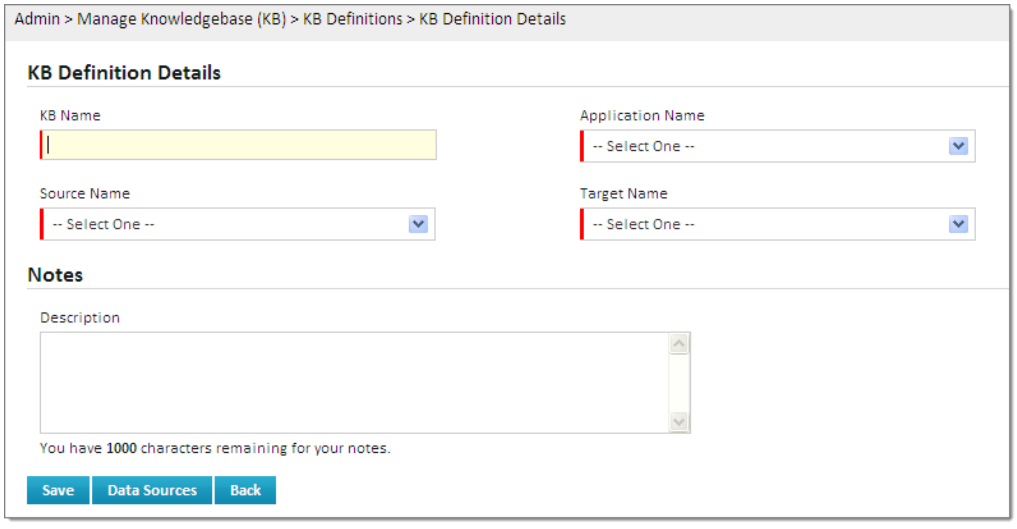
2.4.1 Navigation

To access ***KB Definitions*** link, login to Solix EDMS Standard Edition (SE) and follow the path: ***Admin > Manage Knowledgebase (KB) > KB Definitions.***

2.4.2 Define a new KB Definitions

To add a new KB definition, do the following:

1. Place cursor at ***Admin*** tab in the Solix EDMS Standard Edition (SE) main menu. The list of submenus is displayed.
2. Select ***Manage Knowledgebase (KB)*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***KB Definitions*** option from the drop down. The ***KB Definitions*** screen with the list of existing KB definitions will be displayed.
4. Click ***Add*** button. The ***KB Definition Details*** screen appears to define the source and target databases to the knowledgebase.



5. In the ***KB Definition Details*** screen, do the following:
    a. Enter the name of the knowledgebase in ***KB Name*** text field to register the knowledgebase with the specified name in the Solix EDMS Standard Edition (SE).

b. Select an ***Application Name*** from the corresponding drop down list.

c. Select an appropriate source for the KB from the ***Source Name*** drop down list.

d. Select an appropriate target for the KB from the ***Target Name*** drop down list.

e. Enter the comments in the ***Notes.***

f. Click ***Save*** button. Once the KB definition is saved successfully, the respective KB definition will be registered in the application and a confirmation message will be displayed.

- The field marked as " "are mandatory fields.

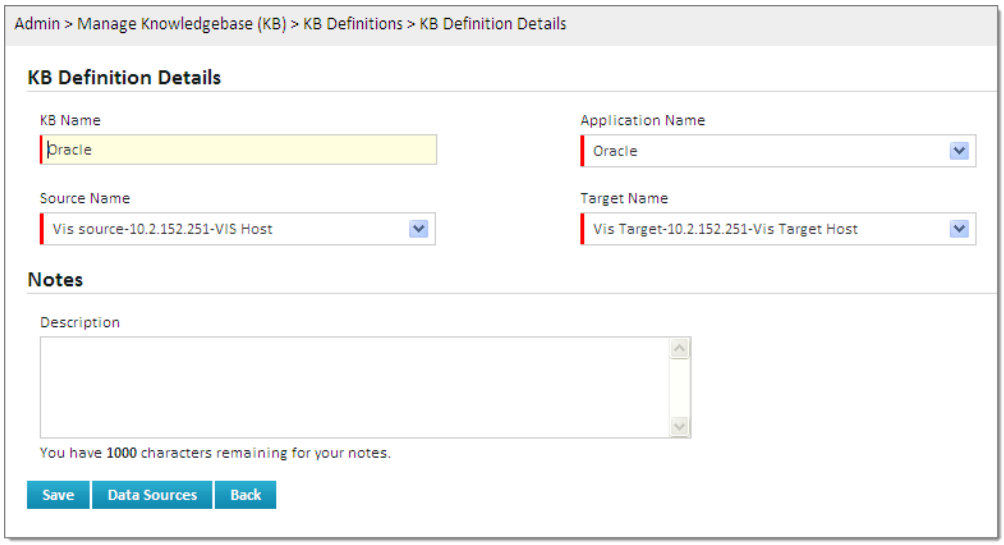
Fields	Functionality
KB Name	It enables the user to define the name of the knowledge base.
Application Name	This drop down list displays the list of applications registered in the Solix EDMS Standard Edition (SE). It enables to define application associated to the knowledgebase.
Source Name	Displays the list of source databases registered in the ***KB Source Target Definitions*** and enables the user to define the source to the knowledge base.
Target Name	Displays the list of KB target databases registered in the ***KB Source Target Definitions*** and enables the user to define the target to the knowledge base.
Notes	It allows the user to enter the description associated to the KB definition
Save	This button is deployed to save the KB definition.
Data Sources	This button is deployed to assign multiple data sources (i.e., source or target) to a single KB. It facilitates to extract and validate the data of various tables from the different source or target databases.
Back	This button is employed to navigate to the previous screen from current screen.

2.4.3 Assigning Data Source

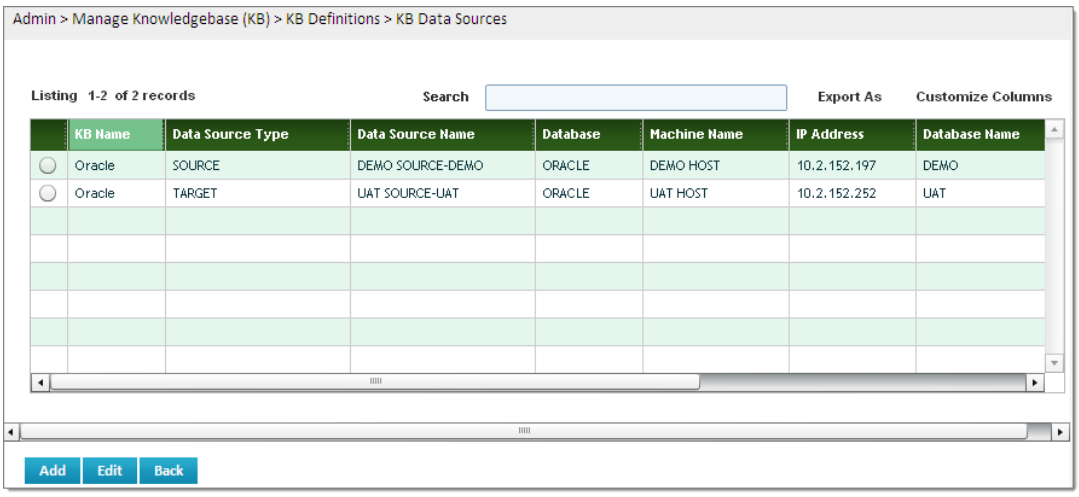
Data Source enables the user to assign the multiple data sources/targets to a single knowledgebase. Also, it manages to extract and validate the data of various tables from different source/target databases during archiving/validation process. (Note: Data source can be employed only for the saved KB definitions).

To assign an additional data source (i.e., source or target) to the KB, do the following:

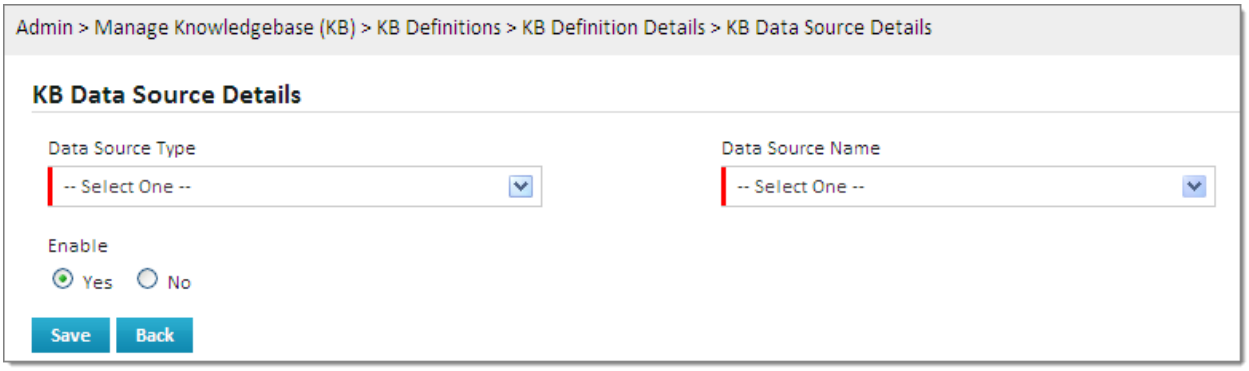
1. In ***KB Definitions*** screen, select the KB for which a multiple data source/target have to be assigned.
2. Click ***Edit*** button. The ***KB Definition Details*** screen appears with the source and target defined for the respective KB as shown in the figure below.



3. Click ***Data Source*** button**,** to assign another data source/target to the KB. The ***KB Data Source*** screen will be displayed with the list of sources/targets assigned to the KB as shown in the figure below.



4. Click ***Add*** button to add the source/target datasource details to the KB. The ***KB Data Source Details*** screen will be displayed as shown in the figure below.



5. Select the type of data source (i.e., target or source) from the ***Data Source Type*** drop down list. For example, if ***Source*** option is selected, the list of source details will be extracted and displayed in the ***Data Source Name*** drop down list
6. Select an appropriate data source from the ***Data Source Name*** drop down list, to assign the selected data source to the respective KB.
7. Select ***Yes/No*** option in the ***Enable,*** based on the option selected the data source will be enabled/disabled for the respective KB during archiving/validation process.
8. Click ***Save*** button, to assign the selected data source to the KB. Once the data sources is assigned successfully, the selected data source details will be appended to the existing data sources in ***KB Data Sources*** list screen.

- The field marked as " "are mandatory fields.

2.5 KB Assignments

Once the knowledgebase is defined in the Solix EDMS Standard Edition (SE), it should be assigned to a user in order to enable the user to access the metadata pertaining to the knowledgebase. This feature is designed to assign the knowledgebase to the user who is already created in the application and empowered with the relevant user role.

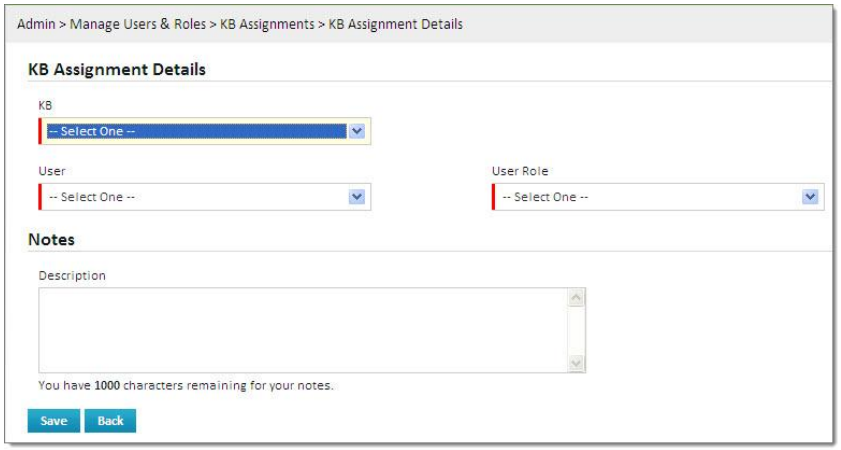
2.5.1 Navigation

To access ***KB Assignment*** link, login to Solix EDMS Standard Edition (SE) and follow the path: ***Admin > Manage Users & Roles > KB Assignment.***

2.5.2 Add New KB Assignment

To assign a KB, do the following:

1. Place cursor at ***Admin*** tab in the Solix EDMS Standard Edition (SE) main menu. The list of submenus is displayed.
2. Select ***Manage Users & Roles*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***KB Assignments*** option from the drop down. The ***KB Assignments*** screen with the list of existing KB Assignments will be displayed.
4. Click ***Add*** button. The ***KB Assignments Details*** screen appears where the information corresponding to the KB assignment can be entered.



5. In the ***KB Assignments Details*** page, do the following:
    a. Select the knowledgebase to which the user and user role should be assigned from the ***KB*** drop down list.
    b. Select the user from the ***User*** drop down list, to assign to the knowledgebase selected.
    c. Select the user role from the ***User Role*** drop down list, to empower the selected user with the privileges defined in the corresponding user role.

d. Enter comments in the ***Notes*** text field.

e. Click ***Save*** button. Once the information is saved successfully, a confirmation message will be prompted on the screen.

Once the KB Assignment is saved successfully, the selected user will be assigned to the specified knowledgebase with the selected user role. To proceed with archiving/validation process it is important that the SQL statements required to perform archiving/validation efficiently are designed or generated correctly.

- The fields marked as and * are mandatory fields.
- If the details provided are invalid, a warning message about the invalid details will be displayed on the screen.

3 Data Archiving process

Solix EDMS Data Archiving Standard Edition (SE) provides data classification to identify scarcely accessed data that can be moved to an active archive. This section illustrate the process to create KB tables, build relations & joins between the tables and design configuration for data archiving process to archive the data from source to target database.

- Both source database and target database must be homogenous. For example, Oracle to Oracle.

Functionalities

The functionalities provided by Solix EDMS Data Archiving Standard Edition (SE) to archive the data from source to target database are listed below.

- User Management
- Environment (Knowledge base) Management
- Source and target definition
- KB Assignment
- Define the tables and their structures for custom tables in Knowledge Base (KB) tables
- Define the table relations for custom tables in the Knowledge Base tables

Assumptions

- All the required KB tables and KB Rules are configured
- Objects (Tables) to be archived have been identified
- Users have the knowledge of the tables and their relations in the data to be archived.

Standard Procedure to Build and Run Configuration

1. Select related tables from the Knowledge Base. The selected tables will be populated in the design space.
2. Link up the selected tables to define the parent-child relationships among them.
3. Specify the driving table that will drive the archive & purge when the configuration is eventually run.
4. Specify the configuration details, specify archive/purge strategy and save the configuration.

5. Define the criteria. By default, the data in all the selected tables will be mapped for Archive & Purge. Defining the criteria allows the user to select specific rows from the tables for archive and purge.
6. Generate ANSI SQL code for the configuration.
7. Run the configuration. The application prompts the user to supply parameter values at run time for archive configuration. Specify values. The run will be scheduled.
8. The archive/purge configuration will be scheduled for run and the application assigns a Run Id to the archive/purge activity.
9. Go to Status Monitor and, using the Run Id, identify the archive/purge activity. by Solix EDMS Standard Edition (SE) application is in process of performing a preview before the actual execution of archive/purge, once the preview completes, the status of the activity turns to preview completed.
10. View the Preview Report of the activity. On successful result, hence execute Archive & Purge.

3.1 Custom Configuration (Design)

Configurator is a powerful tool with a visual design editor to setup custom and standard archive configurations. It enables to generate re-usable ANSI SQL Code for the configurations to move data from one location to another. Configurator includes Auto-Config and partitioning capabilities.

Features of Configurator:

- Provides a powerful configuration tool that enables automatic design and setup of custom configurations.
- Helps in designing meta-data structure.
- Provides an editor that enables the user to use drag-drop components in order to paint the entity relations for customizations and bolt-on applications.
- Enables archiving and purging of data for customizations in the Oracle EBS, PeopleSoft, JDE and other custom-developed or third-party applications.
- Code Generator automatically generates ANSI SQL code, which will enable the user to archive the data across homogenous databases, viz., Oracle to Oracle. This code will be stored in Solix EDMS repository and can be called anytime for any future archive/purge runs.

Archiving Types

- Database to Database
- Database to CSV
- Database to XML

To design custom configuration, the user needs to create a metadata (i.e., KB tables, KB table relation, Join, and so on) and populate the columns in knowledgebase to build the configuration effectively. This chapter outlines the procedure to create a KB table, KB table Relation and build a configuration for archiving. The topics included are given below:

1. KB Table
2. KB Table Relation
3. Creating Configuration for Data Archiving

- It is recommended to created KB Table Relation only if the user is designing the configuration based on multiple KB tables.
- The user must have the knowledge of the parent - child relationship among the tables selected. Inappropriate selection of tables may results in data being orphaned partially or completely.

3.1.1 KB Tables

Tables are the basic unit of data storage in the knowledgebase. KB Table is defined with a table name and a set of columns to extract the data from the database and populate it in the knowledgebase for archiving process. Here, the user is provided feasibility to setup a table in the knowledgebase and add the required columns to the table including metadata of the column (Data type, Primary key flag, Primary Key Sequence, and so on).

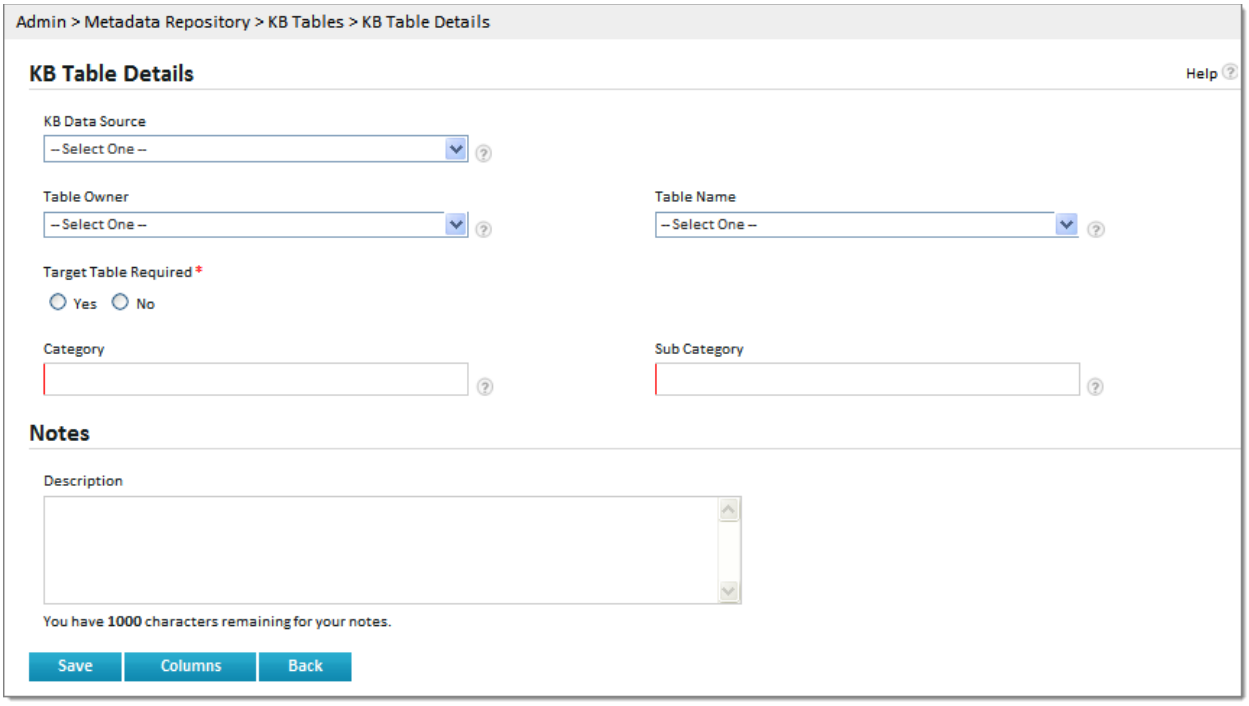
3.1.1.1 Navigation

To access ***KB Tables*** link, follow the path: ***Admin > Metadata Repository > KB Tables.***

3.1.1.2 Add New KB Tables

To add a new KB tables in the knowledge base, do the following:

1. Place cursor at ***Admin*** tab in the Solix EDMS Standard Edition (SE) main menu. The list of submenus is displayed.
2. Select ***Metadata Repository*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***KB Tables*** option in the drop down. The ***KB Tables*** screen with the list of KB tables existing in the knowledgebase will be displayed.
4. Click ***Add*** button, to create a new KB table. The ***KB Table Details*** screen appears to enter the KB table information as shown in the figure below.



5. In the ***KB Table Details*** page, do the following:

a. Select an appropriate data source form the ***KB Data Source Type*** drop down list. Once the data source is selected, the table owners associated to the selected datasource will be listed in the ***Table Owner*** drop down list. (Note: exclusively, the data sources assigned to the respective KB will be listed in the KB Data Source drop down list).

b. Select the ***Table Owner*** from the corresponding drop down list. Once the table owner is selected, the tables associated to the selected table owners will be listed in the ***Table Name*** drop down list.

c. Select the ***Table Name*** from the corresponding drop down list, to define the table in the knowledgebase.

d. Select "***Yes"*** option in the ***Target Table Required***, to create the target table in the target database. Once option is selected***, Auto Create Target Table, Target Table Name*** and ***Target Table Owner*** fields become visible in the screen.

e. Select "***Yes/No"*** option in ***Auto Create Target Table***, to create the target table in the target database automatically during the archiving process.

- If "***Yes"*** option is selected, additional two purge columns "PURGE_SEQ_ID and PURGE_DATE will be created in target table and also two columns will be added in the TARGET_TABLE_PURGE_COLUMNS parameter (Parameter screen).
- If "***No***" option is selected, the table structure of both source and target table will be same.

f. Enter ***Target Table Name*** and ***Target Table Owner*** fields in the corresponding fields, the data will be archived in the corresponding target table during archiving process.

g. Enter ***Category*** in the corresponding field.

h. Enter ***Sub Category*** in the corresponding field.

i. Enter the comments in the ***Notes.***

j. Click ***Save*** button. Once the KB table is created and saved successfully, a confirmation message will be prompted on the screen.

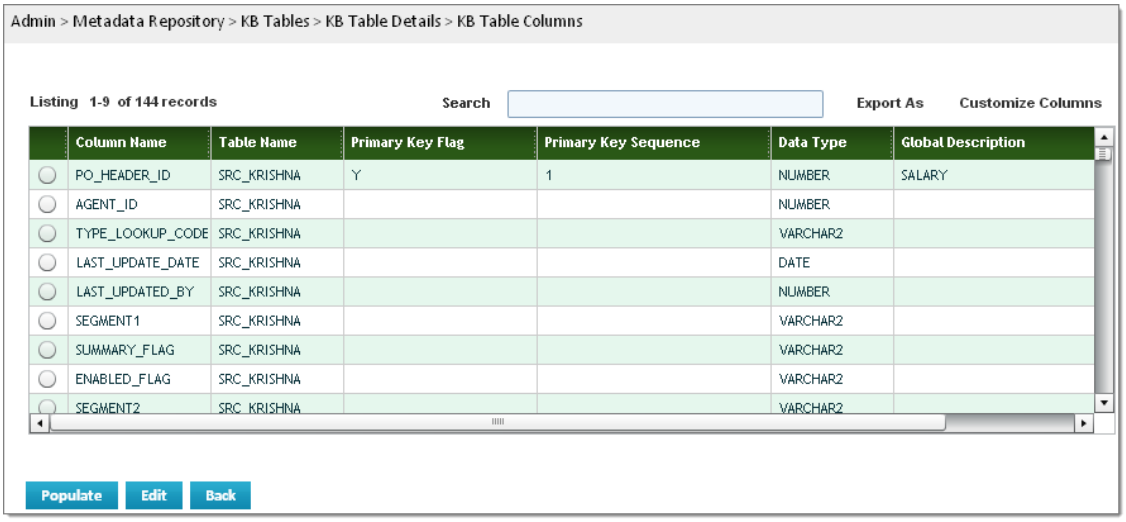
- If the details provided are invalid, a warning message will be prompted on the screen.
- If the KB Table Name already exists, a warning message about duplicate name will be prompted.

- The field marked as are mandatory fields.

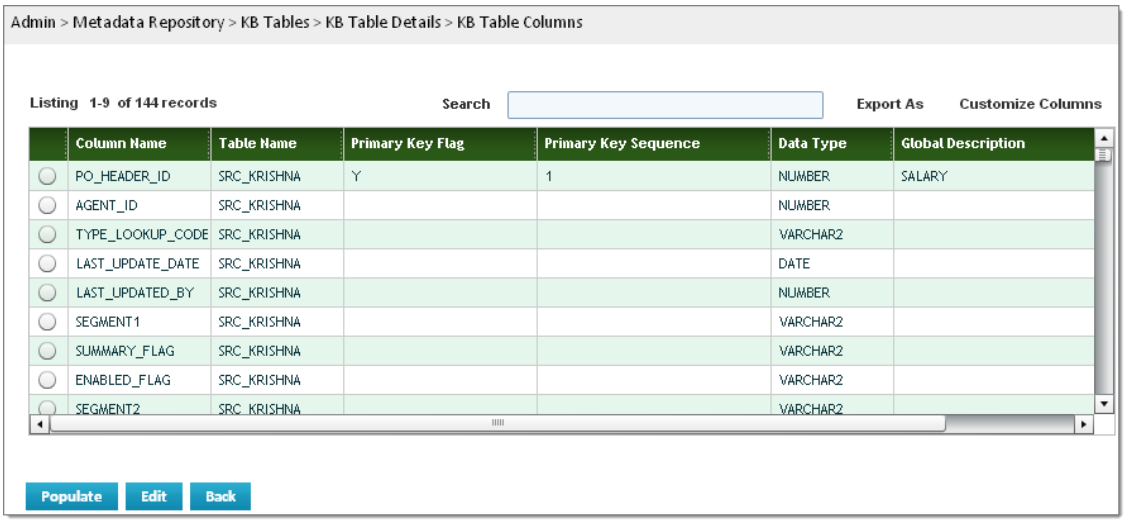
3.1.1.3 Populating Columns

Once the KB table is created, henceforth the user need to populate the columns in KB table from the specified KB Data source. To populate column in the KB table, do the following:

1. In the ***KB Table Details*** page, click ***Columns*** button to navigate to ***KB Table Columns*** screen. Solix EDMS Standard Edition (SE) invokes all the columns pertaining to the configured table from the enterprise application, which are listed in the ***KB Table Columns*** screen.



2. Click ***Populate*** button to populate all the columns in Solix EDMS Standard Edition (SE). The ***KB Table Columns*** page will be displayed as shown in figure below.



3.1.1.4 Editing a Column

Sometimes changes may be made to the column(s) of a table in the application instance that has been configured in Solix EDMS Standard Edition (SE) Knowledge Base. In such cases, the same column changes should be made to the respective KB table in Solix EDMS Standard Edition (SE). The ***Edit*** function enables the users to make such changes to the columns.

To edit a table column, do the following:

1. In ***KB Table Columns*** screen, select the radio button adjacent to the desired column and click ***Edit*** button. The ***KB Table Column Details*** page will be displayed as shown in the figure below.

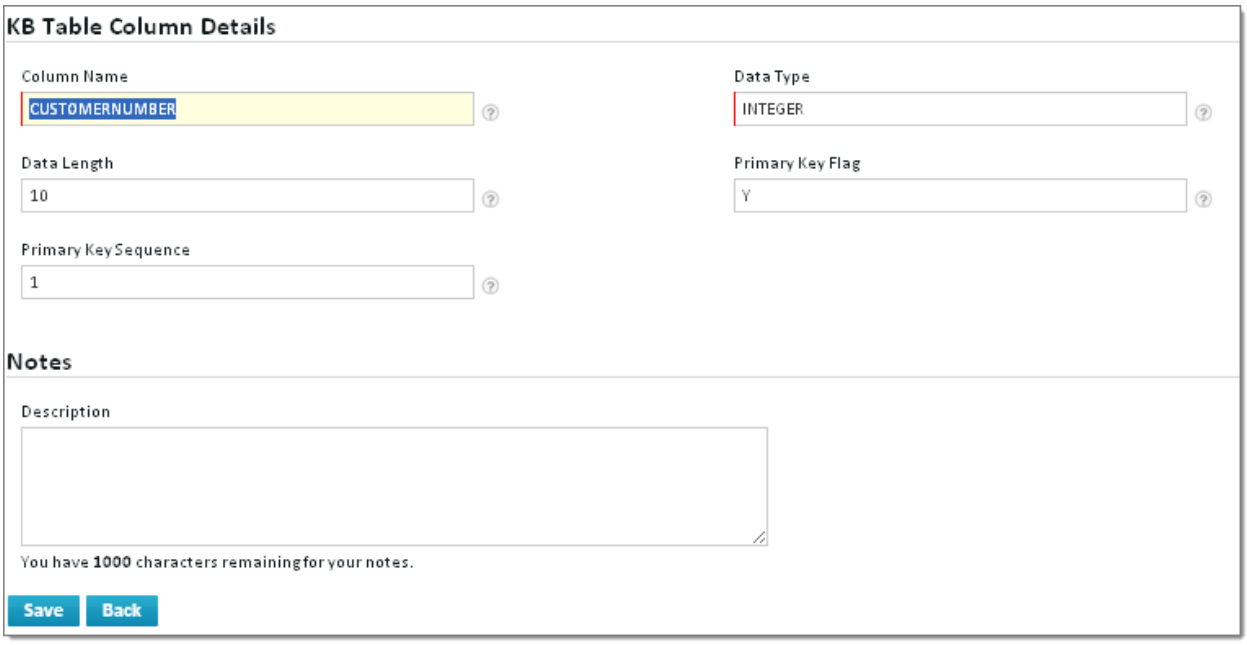


Figure 3-1: KB Table Column Details screen

2. In the ***Edit KB Table Column Details*** screen, do the following:
    a. The ***Column Name*** remains static and cannot be changed.
    b. Make the necessary changes in ***Data Type, Data Length*** fields.
    c. Specify "Y" in the ***Primary key Flag***, when the column is a primary key in the table
    d. Specify the sequence number of the primary key column in the ***Primary key Sequence***
        - Enter "1" value, when single primary key exists in table.
        - In case, when multiple primary keys exist in table, then enter the sequence number of primary key accordingly.

    A piece of data such as salary, etc. may be shared across different Enterprise Applications in an organization but the column names of such data may differ from one application to another. **Global Description** enables the user to identify the counterparts of such column in different Enterprise Applications by the column description and map those columns to the specific table column.

The **Global Description** values that are displayed in the list are created in **Parameters** functionality under **Admin Module** in Solix EDMS Standard Edition (SE). The administrative user, super user, or apps functional user can create the Global Description values for GLOBAL_MAPPING parameter. These values will be listed in the Global Description drop down list in the **Edit KB Table Column Details** page.

3. Click ***Save*** button. The selected column will be updated accordingly.
4. Click ***Back*** button to return to the previous page.

- The field marked as " "are mandatory fields.

3.1.2 KB Table Relations

Table relationship is an association between two or more tables. Relationships are expressed in the data values of the primary and foreign keys. Keys are fundamental to the concept of relational databases because they enable tables in the database to be related with each other. Navigation around a relational database depends on the ability of the primary key to unambiguously identify specific rows of a table.

Knowledge Base (KB) Relations function allows the users to setup the table relations and joins in Solix EDMS Standard Edition (SE). This function is used to configure a child table to inherit the properties of the parent table

- It is recommended to created KB Table Relation, only if the user is designing the configuration based on multiple KB tables.

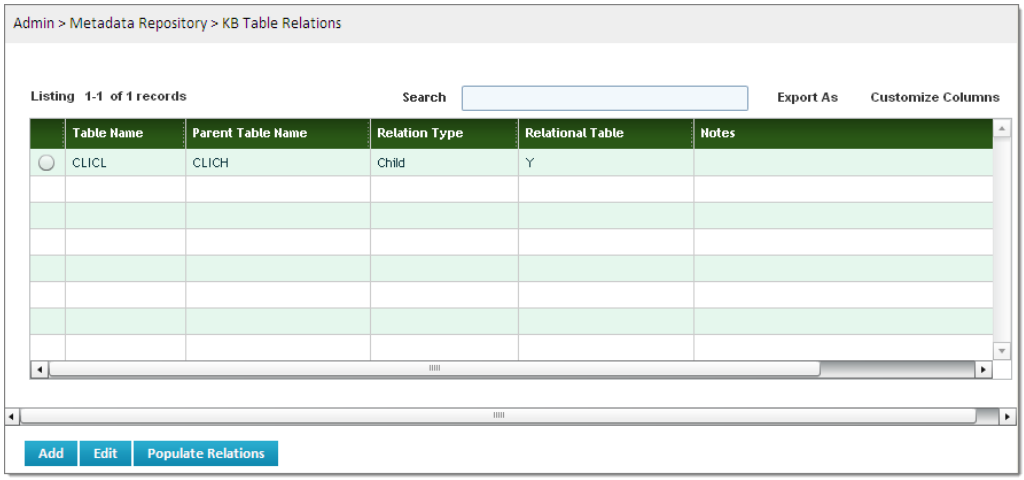
3.1.2.1 Navigation

To access ***KB Table Relations*** link, login to Solix EDMS Standard Edition (SE) and follow the path: ***Admin > Metadata Repository > KB Table Relations.***

3.1.2.2 Add New KB Table Relations

To add a new KB Table Relations, do the following:

1. Place cursor at ***Admin*** tab in the Solix EDMS Standard Edition (SE) main menu. The list of submenu is displayed.
2. Select ***Metadata Repository*** option from the submenu. The list of options is displayed in the drop down.
3. Click ***KB Table Relations*** option from the drop down. The ***KB Table Relations*** screen with the list of existing KB Table Relations will be displayed as shown in the figure below.



4. Click ***Add*** button. The ***KB Table Relations Details*** screen appears to enter the information corresponding to the KB Table Relations.

5. In the ***KB Table Relations Details*** screen, do the following:

    a. Select child table from the ***Table Name*** drop down list.

    b. Select ***Parent Table Name*** from the corresponding drop down list.

    c. Select ***Yes/No*** option in the ***Relational Table***, to indicate whether both the parent table and child table is a relational table or not.

    - If "***Yes***" option is selected, the relations (i.e., Foreign Keys and Primary Keys) exist on the database level.
    - If "***No***" option is selected, the relations (i.e., Foreign Keys and Primary Keys) does not exist on the database level but it will be maintained at the business application level.

d. Enter the comments in the ***Notes.***

e. Click ***Save*** button. Once the information is saved successfully, a confirmation message dialog box will be prompted.

- If the details provided are invalid, a warning message dialog box is prompted.
- If the KB table relations name already exists, a warning message about duplicate name is prompted in the dialog box.

- The field marked as are mandatory fields.

3.1.2.3 Editing an Existing KB Table Relations

To edit ***KB Table Relations***, do the following:

1. From the ***KB Table Relations*** list, select the radio button adjacent to the desired KB Table Relations.
2. Click ***Edit*** button. The ***KB Table Relations Details*** screen will be displayed.
3. In the ***Edit KB Table Relations Details*** screen, do the following:

   a. Make the necessary changes in the required fields.

   b. Click ***Save*** button, to save the modified information. Once the modified information is updated, a confirmation message will be prompted.

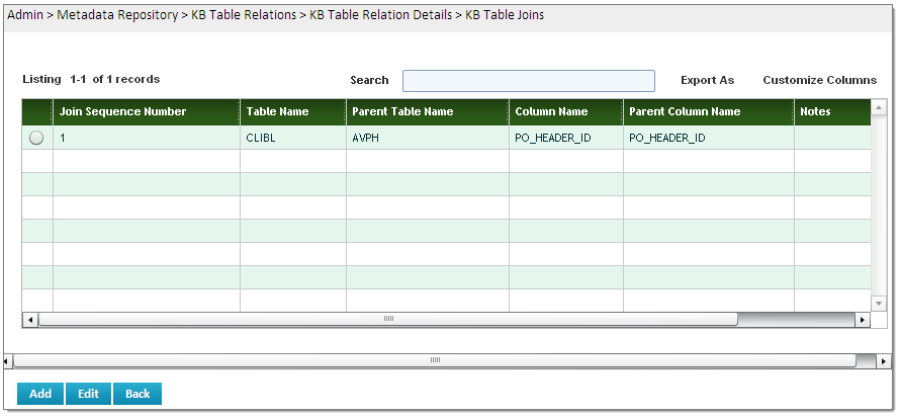
- The field marked as are mandatory fields.
- If the details provided are invalid, a warning message is prompted
- To return to the ***KB Table Relations List*** screen from ***Add / Edit Details*** screen, click ***Back*** button.

3.1.2.4 Configuring Table Joins

Joins preserve the lineage of the tables in the KB. This function keeps track of all the links that connects one table with the other tables in the KB.

Path: ***KB Table Relations Details*** screen (Refer to KB Table Relations Details)

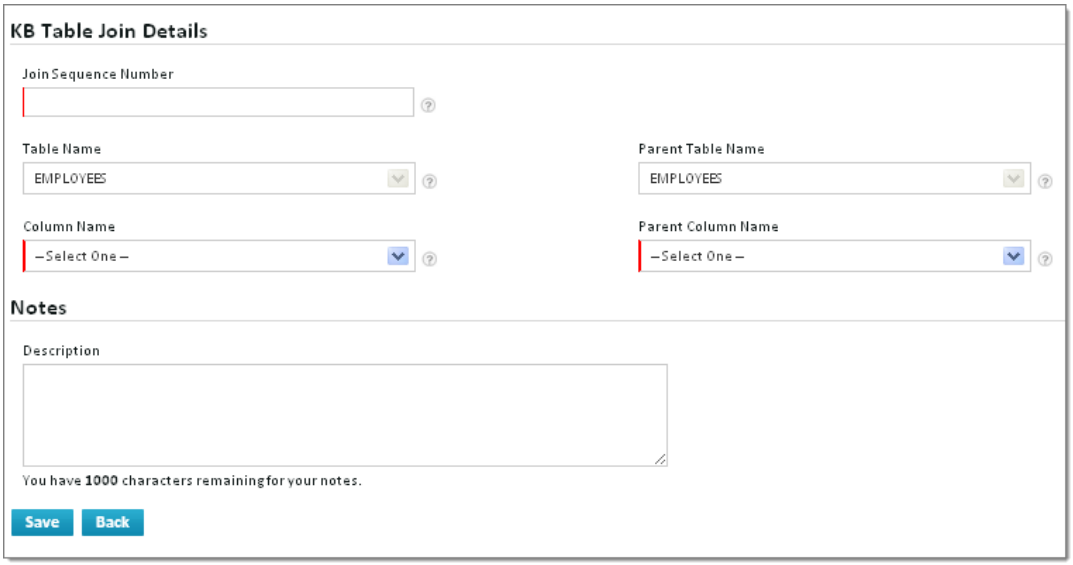
- In ***KB Table Relation Details*** screen, click ***Joins*** button. The ***KB Table Joins*** screen displays the existing table joins corresponding to the KB Table Relation as shown in the figure below.



3.1.2.5 Add New KB Table Join

To add new KB Table Join, do the following:

1. In the ***KB Table Joins*** screen, click ***Add*** button. The ***KB Table Joins Details*** screen will be displayed as shown in the figure below.



2. In the ***KB Table Joins Details*** screen,

   a. Enter the sequence number associated to the join associated to the KB relation in the ***Join Sequence Number*** text field. This allows the user to execute the joins based on the given sequence number during execution of KB table relation.

   b. ***Table Name*** and ***Parent Table Name*** specified in the ***KB Table Relation Details*** by the user will be displayed in the dialog. All the columns in the Table and the Parent Table will be listed in the drop down lists against Column Name and Parent Column Name respectively.

   c. Select the appropriate column name of the child table from the ***Column Name*** drop down list to which the linkage to parent table is established.

d. Select the appropriate column name of the parent table from the ***Parent Column Name*** drop down list to which the linkage to child table is established.

e. Enter the comments in the ***Notes.***

f. Click ***Save*** button, to develop the parent-child relation among the specified tables. Once the information is saved successfully, a confirmation message dialog box is prompted.

- If the details provided are invalid, a warning message dialog box is prompted.
- If the KB Table Join Name already exists, a warning message about duplicate name is prompted in the dialog box.

- The field marked as are mandatory fields.

3.1.2.6 Editing an Existing KB Table Join

To edit an existing KB Table Join, do the following:

1. From the ***KB Table Join*** list, select the radio button adjacent to the desired KB Table Join.
2. Click ***Edit*** button. The ***KB Table Join Details*** screen will be displayed.
3. In the **Edit KB Table Join Details** screen,
   a. Make the necessary changes in the required fields.
   b. Click ***Save*** button, to save the modified information. Once the modified information is updated successfully, a confirmation message is prompted.

- The field marked as are mandatory fields.
- If the details provided are invalid, a warning message will be prompted.
- To return to the list screen from ***Add / Edit Details*** screen, click ***Back*** button.

3.1.3 Creating Configuration for Data Archiving

Solix EDMS Standard Edition (SE) provides the feasibility to generate re-usable ANSI SQL Code automatically. The configurator is a powerful tool designed to setup the custom configurations to archive the data in the archiving process. The tool includes Auto-Config capabilities.

The KB tables and KB Relation (optional based on requirement) are requisite to build the configuration for data archiving and stores the configurations in the KB Explorer. Once the configuration is created and code is generated, the user can initiate the data archiving process in Solix EDMS Data Archiving Standard Edition (SE)**.** To create a new configuration, do the following:

3.1.3.1 Navigation

To access Configurator screen, there are two ways to navigate to the Configurator:

1. In Solix EDMS Standard Edition (SE) home page, click ***Launch Data Archiving Configurator*** button adjacent to the Database Archiving as shown in the figure below**.**

2. In Admin pane, navigate to the following path: ***Setting*** > ***Database Archiving*** > ***Configurator***.

3. The ***Configurator*** screen will be displayed as shown in the figure below.

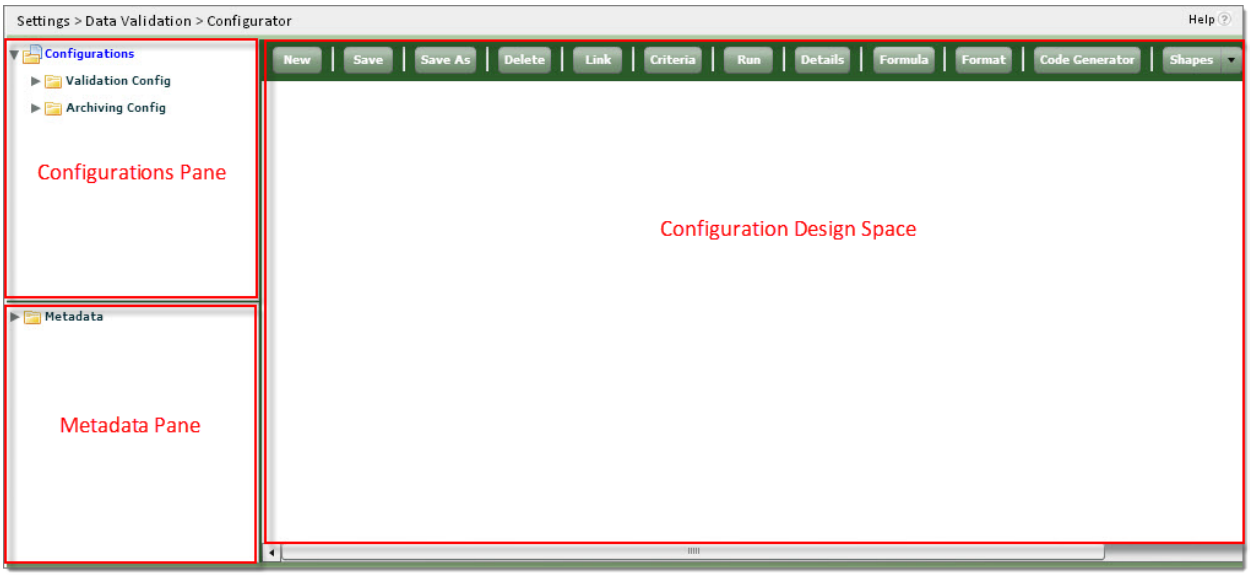
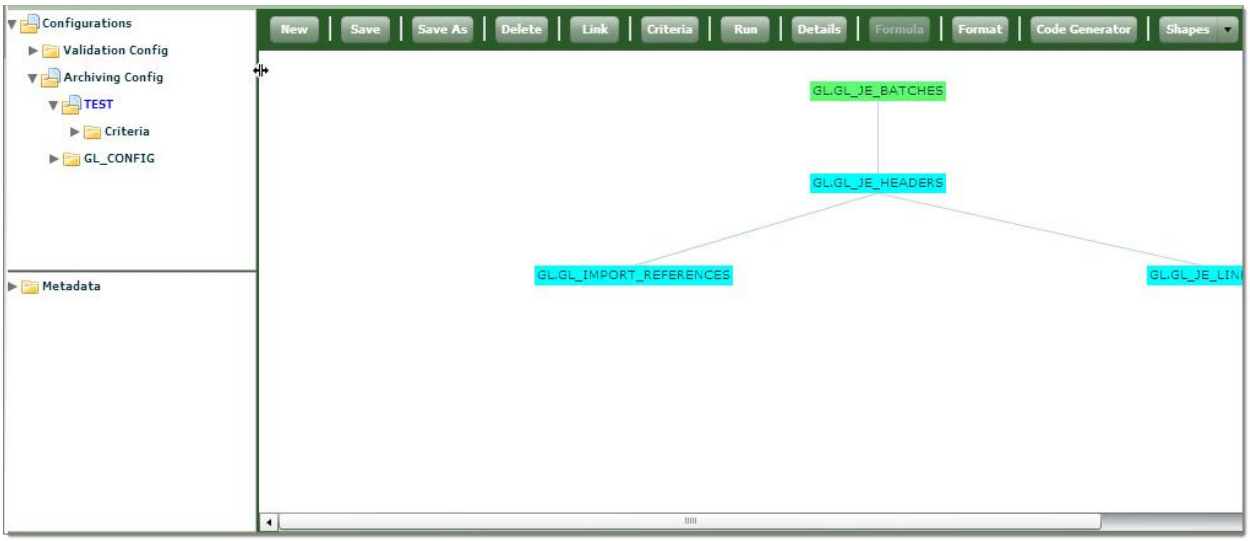


Table 1: Illustrate the dashboard of Configurator

Fields	Functionality
Configurations	Configuration pane is designed to store the configurations created and saved in the Configurator for Data Validation and Data Archiving.
Metadata	Metadata pane is designed to store the tables created in the respective knowledgebase. It maintains the tables and provides feasibility to design the configuration using tables in metadata.
Configurator Design Space	This pane provides flexibility to design the metadata structure of configuration such as tables, establishing link between related tables, configuring the driving tables and so on. It depicts the tables selected for creating metadata structure in configuration and once populated in the Design Space, a table can be dragged and placed anywhere in the space according.
New	This button is employed to create a new configuration.

Save	Once the metadata structure is designed and appropriate criteria are setup for the configuration. This button is deployed to save the details of configuration created or update the information of configuration as per the modification. Automatically, the saved configuration will be accumulated in the Configuration pane and can be re-usable in future.
Save As	This button is employed for the duplication of existing configuration or to save the information of existing configuration with different configuration name.
Delete	This button is employed to delete the configuration.
Link	This button is employed to establish the parent-child relationships among the selected tables in Design Space. Note: only if the relation among the tables is defined/exist in the knowledgebase, the relationships among those tables can be established.
Criteria	This button is employed to define criteria in the configuration for validation process, in order to extract the data for the validation based on the given criteria. For example, • If the user needs to validate the specific data of the table or apply some condition to extract a specific data in the database. In such case, the user defines the condition in the Criteria Details screen. Note: Solix EDMS Standard Edition (SE) restricts to save a new configuration, if the criteria are not defined for the respective configuration.
Run	This button is employed to execute the data archiving configuration. By default, this button will be disabled for data validation configurations.
Details	This button is employed to view the details of selected configuration and criteria.
Format	This button is deployed to format the configuration as per the requirement. Only, the saved configurations can be formatted.
Generate Code	This button is employed to generate a re-usable ANSI SQL code based on the criteria defined in the respective configuration. The generated SQL code will be employed in the validation process to validate the data.
Shape	This button facilitates to utilize various kinds of shapes (such as square, rectangle, arrows, and so on) while designing the configuration.

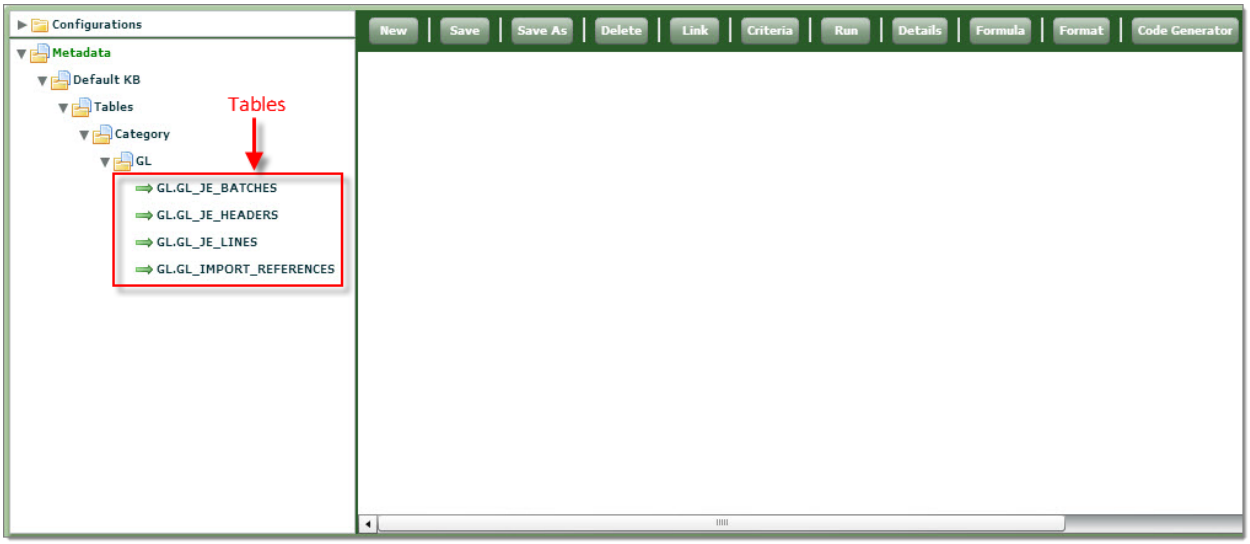
4. Expand the ***Configurations*** > ***Archiving Config*** folder, to view the saved data archiving configurations.



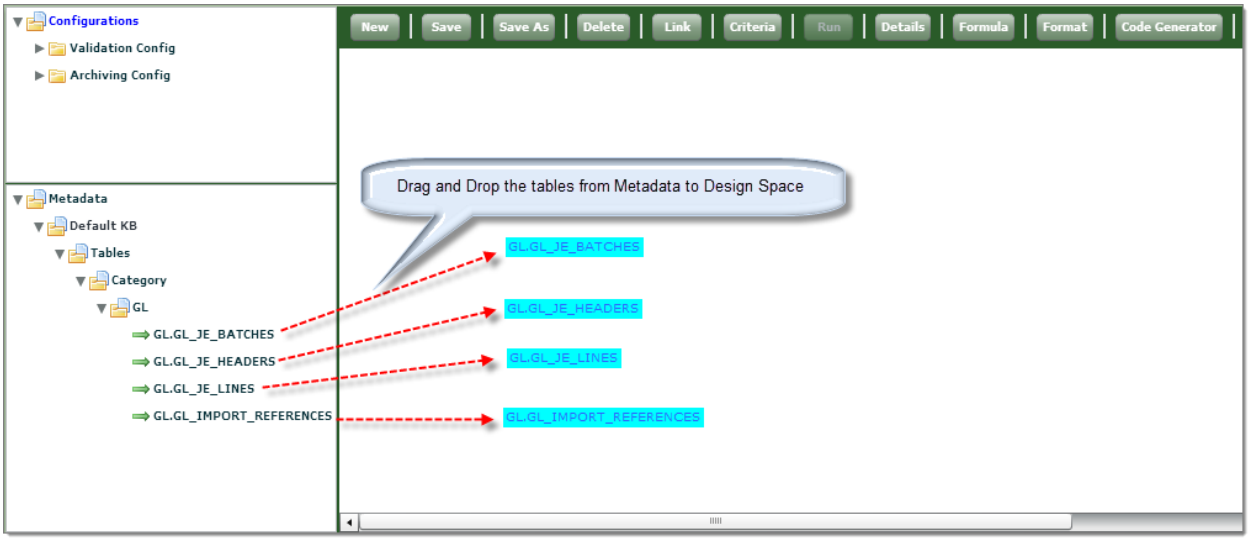
- Only, 10 configurations are restricted for a KB.

3.1.3.2 Initiate the creation of new configuration

1. Navigate to ***Metadata*** > ***OracleERP11i*** > ***Tables*** > ***Category***> [***Table Owner]*** folder in the Configurator, to list all the tables existing in the corresponding table owner as shown in the figure below.



2. Now, select the tables required to create a configuration from the Metadata pane. Drag and drop the tables in the configuration designer pane (i.e., Design Space) to build a new configuration as shown in the figure below.



Once the tables are selected from the metadata and dragged into the Configurator Design Space, the user needs to develop a link between the tables based on the parent-child relationship.

- The user must have the knowledge of the parent - child relationship among the tables selected. Inappropriate selection of tables may results in data being orphaned partially or completely.

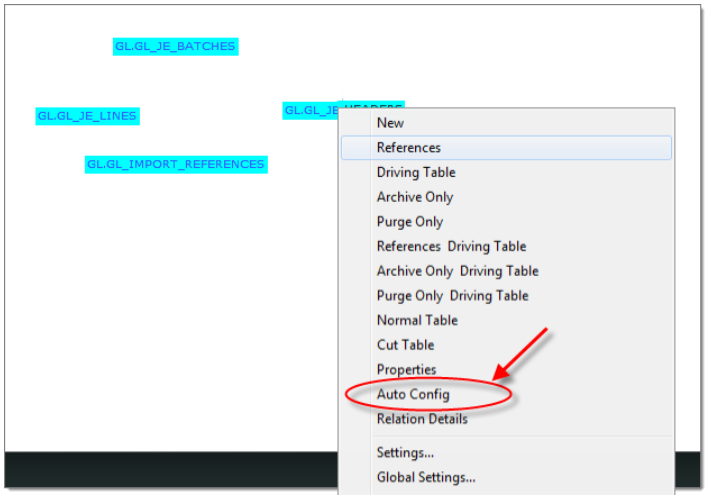
3.1.3.3 Create Table Links

To create links between tables, do the following:

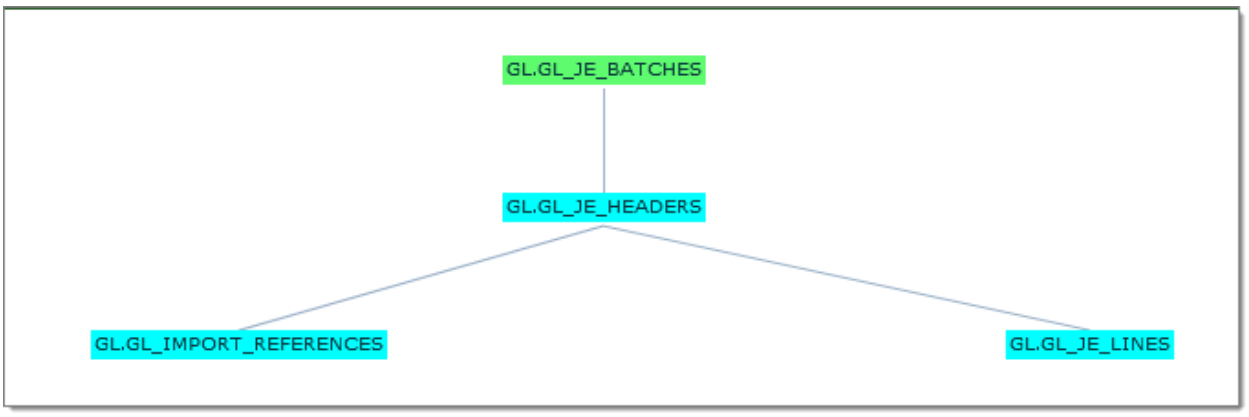
1. First ascertain which tables to connect and in what order. The user must consider the parent-child relationships among the selected tables.
2. Click Link button appears on the ***Configurator*** toolbar.
3. In the ***Configurator Design*** Space, click the first table (child table) and then click the second table (header table) depending on the parent child relationship between the tables.
4. Both the tables are linked.
5. Repeat the above procedures to connect all the selected tables according to the table relationships.

To populate related tables and establish links between them automatically, do the following:

6. Select the ***Table*** from the **Tables** folder in the KB Explorer. Drag and drop the selected table in the Design Space.
7. In the Design Space, right click on the selected table. A drop down menu appears on the screen and select ***Auto Config*** option from the menu as shown in the figure below.



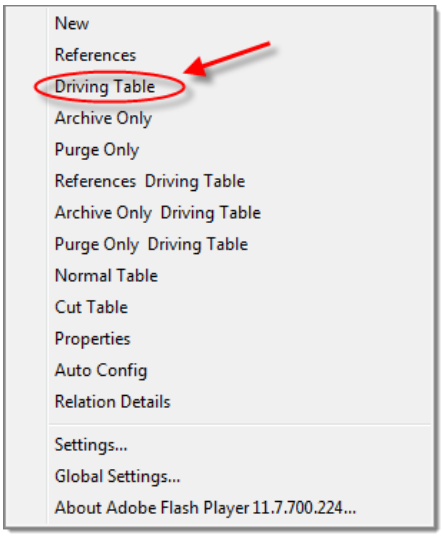
8. Once the option is clicked, the tool picks and populates all the tables related to the respective table in the design space; then it establishes relational links among those tables; and finally assigns an appropriate table from the selected ones as the driving table that drives the archiving process as shown in the figure below.



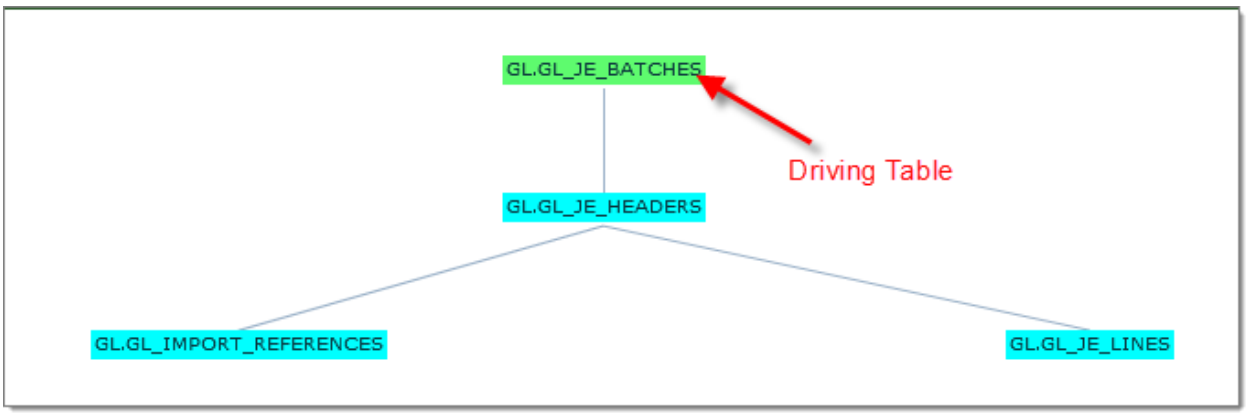
3.1.3.4 Configure Driving Table

To set the driving table, do the following:

1. Once the Parent-child relations is established, to set the driving table in the linked tables. Right-click the table that is intended to drive the configuration, a menu drop down list appears in the Design Space as shown in the figure below.



2. Once the Driving table option is clicked, the respective table turns green and represents as a driving table in the configuration as shown in the figure below.



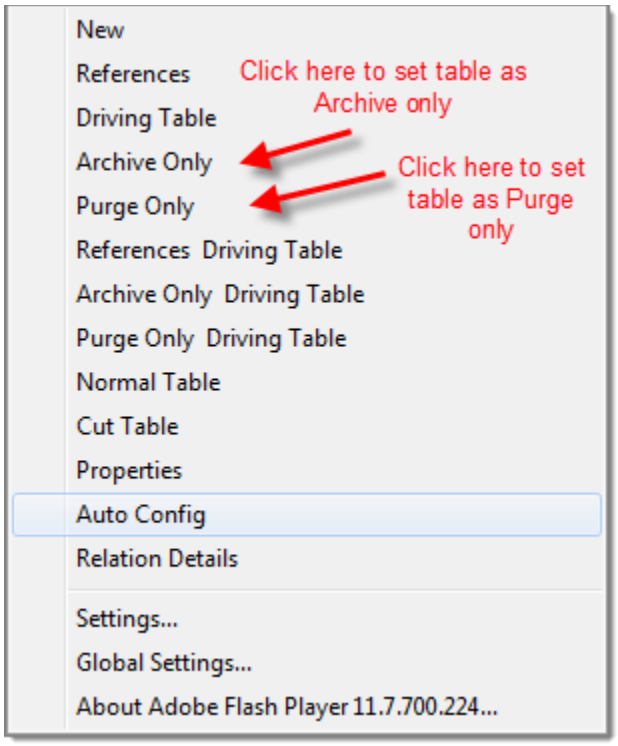
Once the tables are linked and the driving table is assigned, this accomplishes the process of designing a configuration.

3.1.3.5 Configure Archive or Purge Table

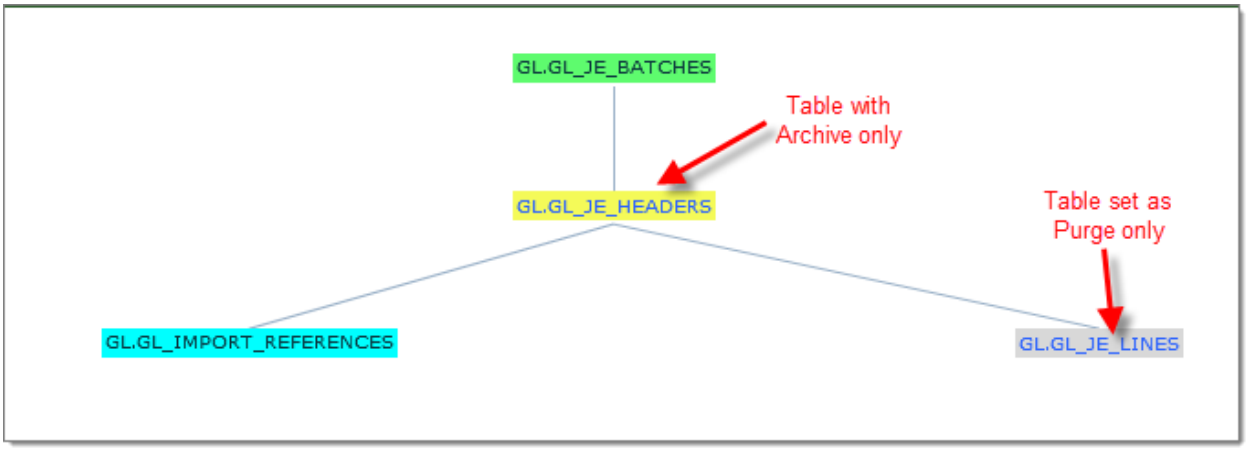
In case, when the configuration is designed for Archive & Purge, the user is provided an option to configure a table for only Archive or only Purge the data in the source.

To set archive or purge table in configuration, do the following:

1. Right-click the table that is intended to set as Archive or Purge in the configuration, a menu drop down list appears in the Design Space as shown in the figure below.



2. Once the archive only / purge only option is clicked,
   - For Archive Only, the respective table turns Yellow color and represents as Archive Only table in the configuration as shown in the figure below.
   - For Purge Only, the respective table turns Grey color and represents as Archive Only table in the configuration as shown in the figure below.

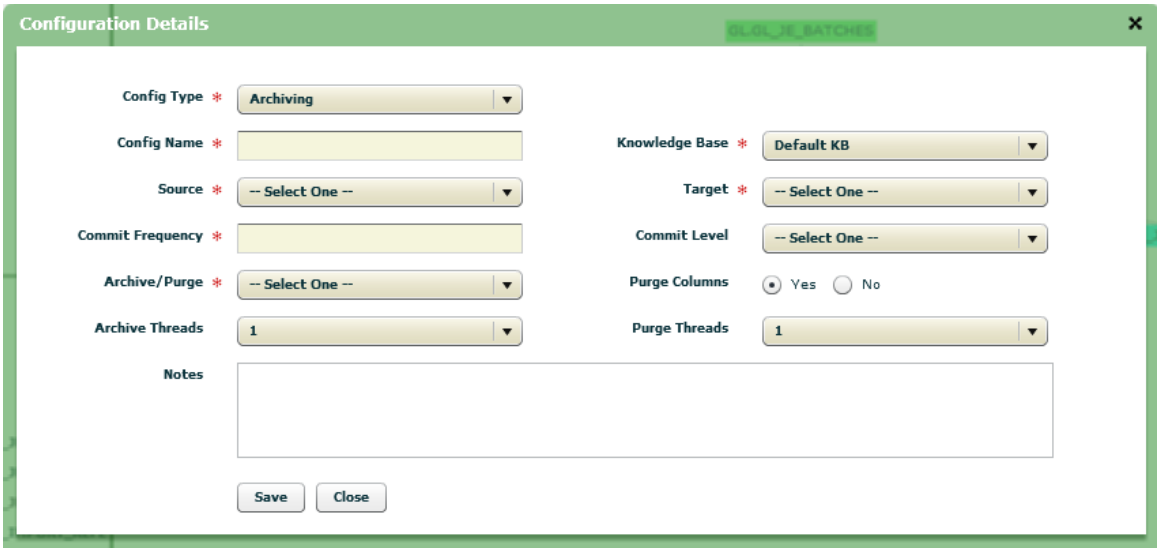


Herein, whenever the configuration is executed for Archive and purge activity in data archiving process remaining all tables will be Archived and purged, whereas the tables configured with Archive only or purge only in design space will be only archived or purged accordingly.

3.1.3.6 Setup Configuration Details:

Once the configuration is designed successfully, henceforth the configuration details must be setup to carry out the process. To setup configuration details,

1. Click Save button appears in the ***Configurator*** toolbar.
2. The Configuration Details window prompts on the screen, and enables the user to provide the ***Configuration Details*** screen as shown in the figure below.



3. In the ***Configuration Details*** popup window:
    a. Select ***Archiving*** option from the ***Config Type*** drop down list, to define the configuration is built for data archiving process.
    b. Enter ***Configuration Name*** in the corresponding field.
    c. Select the appropriate KB from the corresponding drop down list.
    d. Select the source and target from the corresponding drop downs, to archive the data from the selected source to target location.
    e. Specify ***Commit Frequency*** in the corresponding field.
    f. Set ***Commit Level*** by selecting an option from the corresponding drop down list. There are two commit levels the user can choose based on the requirement,

- *Bulk:* This option enables to capture the Row ID or Primary Key information of archive eligible data in a temp table on source location for all the tables in the configuration. Make use of those temp tables to archive purge the data as per commit frequency.
- *Bulk Skip Selection*: This option enables to archive /purge data Table-wise in the configuration. Here, no temp table is created and commit frequency is not considered for execution.

- *Bulk-Parent Based*: This option enables to capture the header tables in a temp table on source location for all the tables in the configuration. Make use of those temp tables to archive purge the data as per commit frequency.

g. Specify ***Archive/Purge*** method. Select an option from the corresponding drop down list.

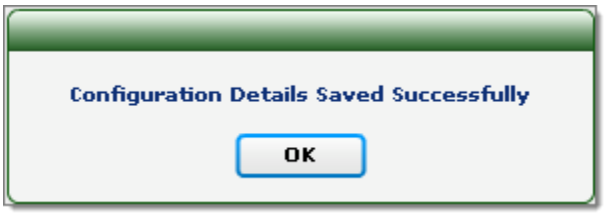
- *Archive and Purge*: Archive and Purge option enables to archive data from the source table into target tables (i.e., Oracle to Oracle). Simultaneously, the data in the source table will be deleted during this process.
- *Archive Only:* Archive only option enables to archive data from the source table into target tables but the data in the source table will not be deleted.
- *Purge Only*: Purge Only option deletes the data in the source table.

h. Select appropriate option in the Purge Columns options (i.e., Yes/No), to enable/disable purge columns in the target tables. If '***Yes***' is selected, the purge sequence id as well as the purge date in the corresponding history tables will be captured.

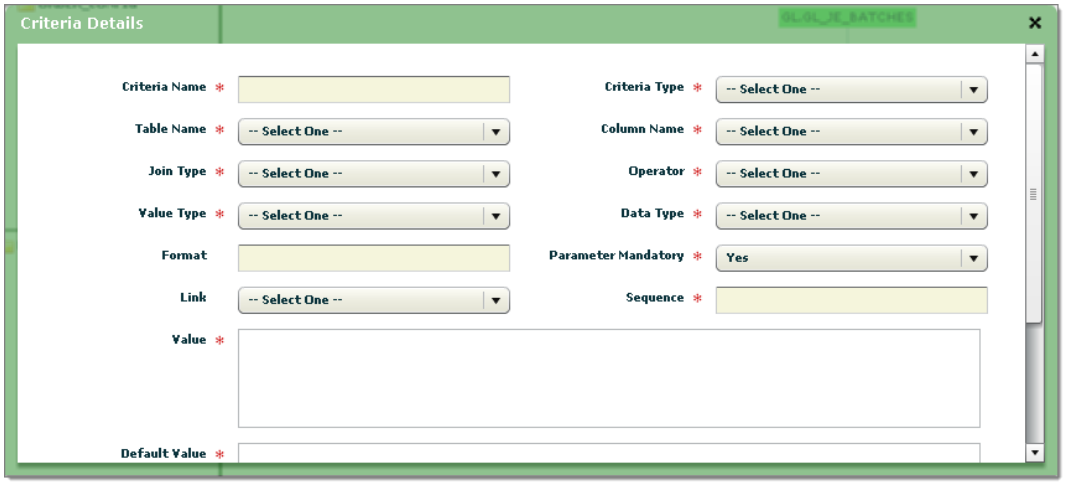
i. Select number of parallel ***Archive/Purge Threads*** from the corresponding dropdown. When the configuration is run, then the specified number of threads will be invoked and run in parallel to execute the process.

j. Enter the ***Description*** in the corresponding field.

4. Click ***Save*** button, to save the configuration details. Once the configuration details are saved successfully, the respective configuration is created and saved in the **Archiving Configs** folder under **Configurations** in the **Configurator**.



5. To add criteria in the configuration, click ***Criteria*** Button. The ***Criteria Details*** screen popup window prompts as shown in the figure below.



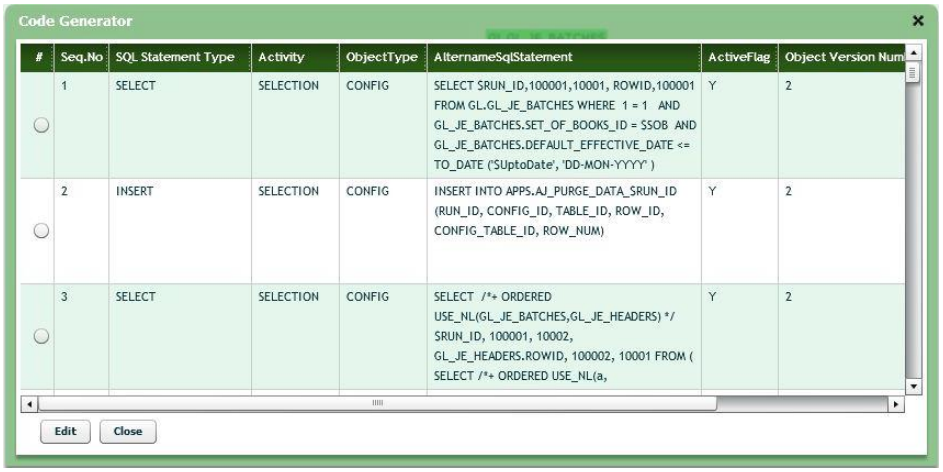
Below table illustrates the functionalities of fields in the Criteria Details screen.

Fields	Functionality
Criteria Name	Define a name for the Criteria in configuration
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 configuration 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 configuration.
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 variable(s) which may be derived from the earlier parameter(s). 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 validating the data.
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.

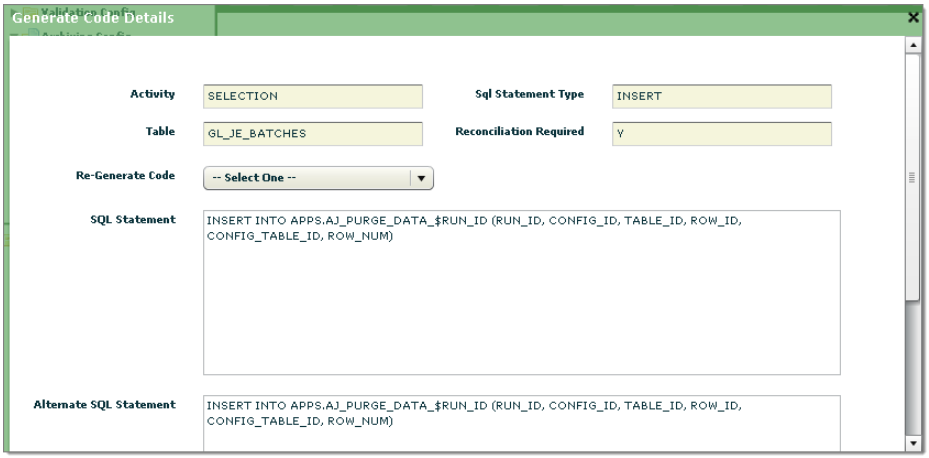
6. Enter the criteria details and click ***Save*** button. Once the criteria is saved successfully, the output of the archiving process will be generated based on the defined criteria. Henceforth, generate a code for the respective configuration.
7. Click ***Generate Code*** button to generate the SQL Statement (i.e., Alternate SQL statement) for the corresponding config in the ***Code Generator*** window as shown in the figure below.



Now, the generated SQL statement will be used in archiving process to archive the data accurately.

Also, user is provided an option to edit the generated code. To edit generated code, do the following:

a. In ***Code Generator*** screen, select the appropriate SQL Statement and click ***Edit*** button. The ***Generate Code Details*** screen will be displayed as shown in the figure below.



b. Make the necessary changes in the SQL Statement /Alternate SQL Statement text box.

c. Click ***Save*** button, to update the modified SQL statement.

- The field marked as "*" are mandatory fields.
- Whenever any modifications take place in the configuration, it's mandatory to generate a code once again to revise the SQL statement accordingly.
- It is recommended to define criteria for a new configuration in order to fetch a small set of data as per the requirement and accomplish the archiving process effectively in a less time.

3.2 Custom Configuration (Execution)

Once the data archiving configuration is designed successfully the data archiving process can be executed. Based on the configuration setup and criteria defined, the data in the source will be archived to the target database and enable the user to view the status in the status monitor.

There are two ways to execute configuration:

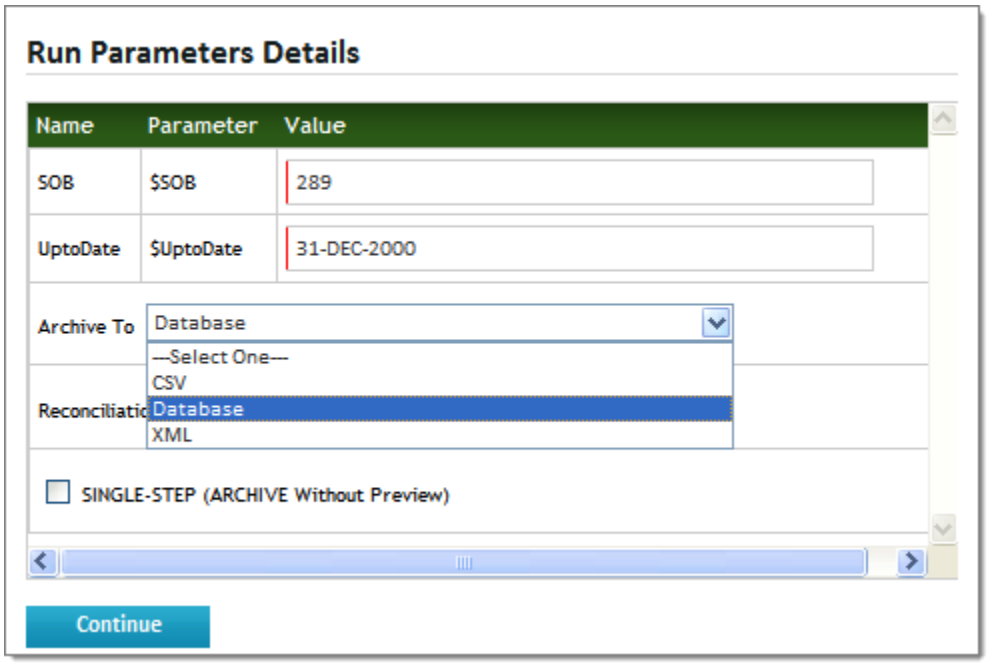
1. Executing configuration in the Configurator toolbar.
2. Executing configuration in the following path: ***Database Archiving > Configurations.***

3.2.1 Run configuration using Configurator

The Configurator not only allows the user to design and setup configurations, but also run those configurations. The Configurator first ascertains the need to enter any dynamic parameters. If so, the user is required to enter the values for all the dynamic parameters in the run-time parameters screen. Constant parameters (those with static values) are also displayed in the run parameters screen.

Users who do not have the privilege to create the configurations can run the pre-configured configurations from the Designer.

1. From the ***Configurations*** folder in the KB Explorer, select the ***Configuration*** to run.
2. Click ***RUN*** button in the ***Configurator*** toolbar. The parameters dialog pops up prompting the user to provide the value(s) against the parameters defined in the configuration.



a. Specify the values in the respective parameters**.**

b. Select ***CSV/ Database/ XML*** option from the ***ARCHIVE TO*** dropdown, to archive the data from respective source to target. For example, to archive the data from database to CSV.

- If the value provided in the criteria is a ***static*** value, then at run-time the archive/purge process is executed based on that value without seeking any value from the user.
- If the value defined in the criteria is a ***dynamic*** value, then at run-time the application seeks a value from the user and the archive/purge process will be executed based on this value. Also, on providing a dynamic value, the Configuration will automatically run for the dependent values, if any.
- If no criterion has been defined for a configuration, then the parameter against the configuration says 'No Parameters'.

c. Suppose, if the user wants to reconcile the data been archive. Enter the percent of data to be reconciled in the ***Reconciliation*** text box. While archiving, the data been archived for each thread will be reconciled for the specified percentage of commit frequency. (Exclusively, it is applicable when source and target are located in a single Repository and it is Oracle database).

d. Click ***CONTINUE*** button to run the configuration. By default, custom archiving is done in two-steps. Firstly, it previews and secondly it archives.

- If ***'SINGLE-STEP'*** option is not selected, the process will be terminated at 'Preview Completed'.

e. Once Preview process is completed,

- To perform only archiving, deselect the 'Continue Purge' option.
- To perform archiving & purge, select 'Continue Purge' option.

f. Click ***Run Configuration*** button, the custom archive run will be scheduled and a unique ***Run ID*** will be assigned to the job and displayed in the ***Run Parameters*** window. Note this ***Job Run ID.*** Using this ID, Users can view the status of this particular custom archive activity in the Status Monitor.

g. Click ***CLOSE*** button to close the pop-up window.

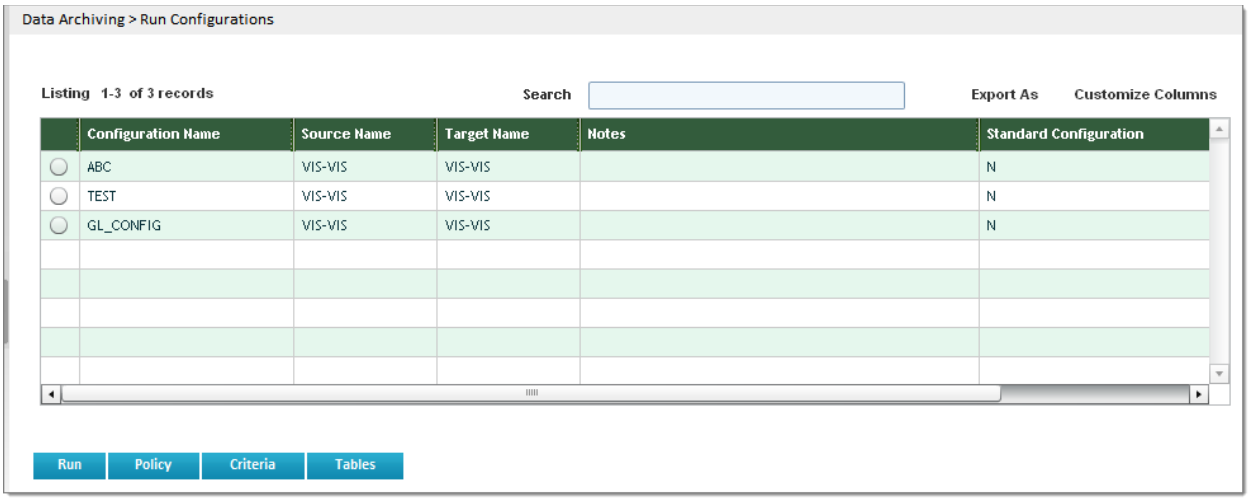
3. Go to ***Status Monitor*** screen ***(Status > Status Monitor)***.

- The number of and type of parameters will differ from one configuration to another while executing a configurations, since the user defines the different set of parameters for individual configurations.
- To bypass the preview and archive the records directly, then select '***SINGLE-STEP***' option before clicking ***CONTINUE*** button.
- The data that matches the criteria is only selected at this point. To continue with the Archive/Purge process, the user has to go to the Status Monitor where the scheduled process can be previewed and executed. However, process starts executing instantly and status will be displayed in the status monitor.

3.2.2 Run configuration in Generic Method

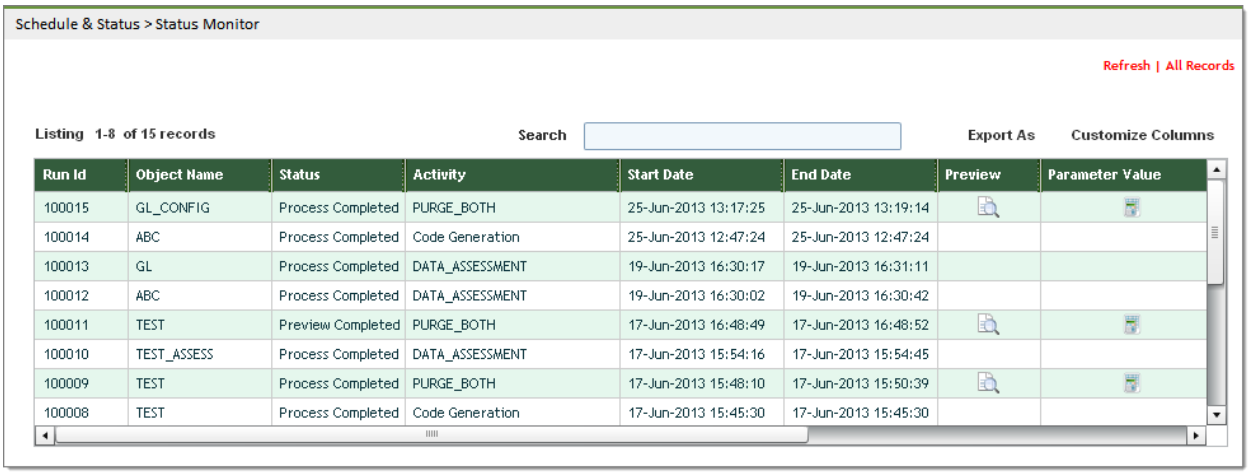
Once the configuration is created in the Configurator successfully, the user can execute it whenever it is required. Solix EDMS provides a user-friendly environment to execute the existing configuration based on the requirement.

- Navigate through the following path: ***Database Archiving*** > ***Configurations***. Select the intended configuration and click ***Run*** button.



3.2.3 Monitoring status of Data Archiving execution

Status Monitor screen displays the list of all the jobs run scheduled for execution along with details including status. In the ***Status Monitor*** screen, refer to the Run IDs in the first column to locate the Run ID of the required custom archive job.



1. Locate the custom archive job.
2. The status is shown as ***'In Process'*** while the process is in progress or has just initiated. The blue font of '***In Process***' indicates the hyperlink to the archive/purge status of individual tables in the configuration. However, this facility is available only for ***Archive & Purge*** processes.

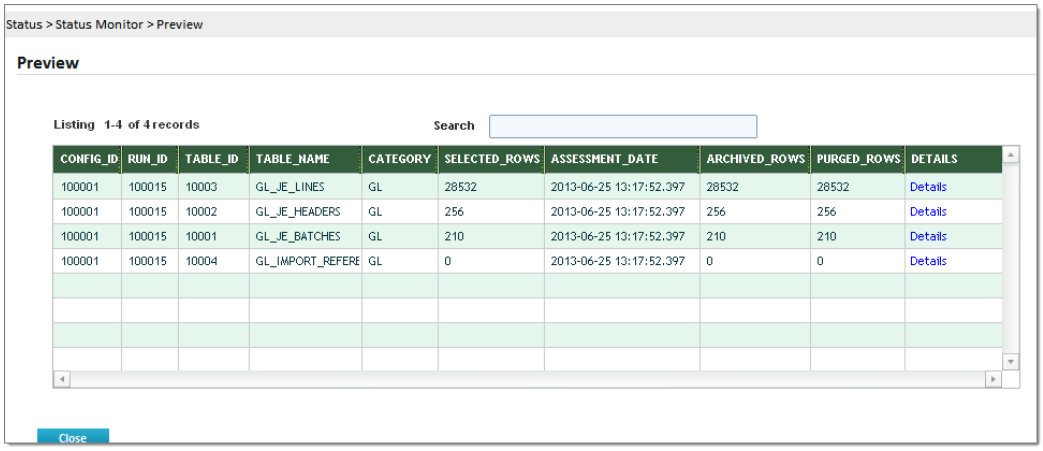
3. On completion of preview, the message in the corresponding status turns to 'Preview Completed' and the Status Monitor generates SQL queries and Preview Report for the tables in the Custom Configuration that has been executed.

To view the dynamic SQL queries for the tables in the custom configuration, do the following:

- Click the corresponding ***SQL*** button. A window pops up presenting in sequence the SQL Queries generated at run-time for all the tables in the custom archive configuration.

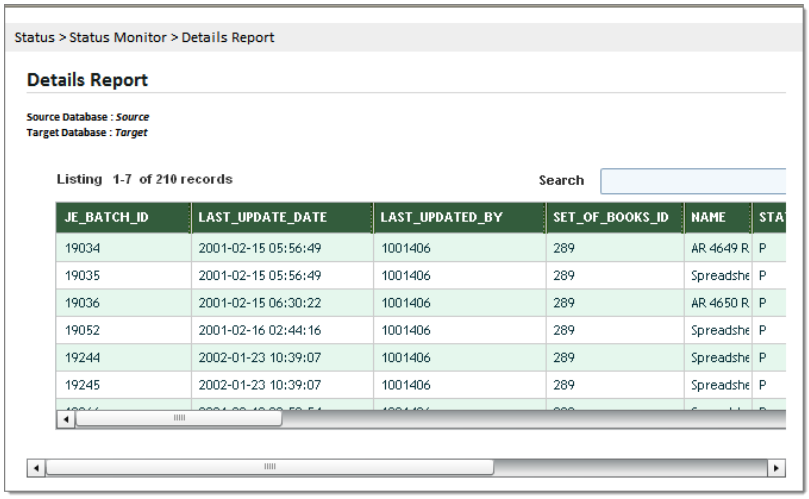
To get a Summary Report for the custom archive job, do the following:

1. Click on the corresponding ***PREVIEW*** button in the Status Monitor. A pop-up window displaying the ***Summary Report*** for the custom archive job that has been scheduled for run. The report gives a preview of space gained, selected rows and total row count in each of the configured tables along with the module name and the space used by each table.



- To view detailed report of each tables in Configuration, then click Details hyperlink adjacent to the intended table.

2. When status of configuration is "Preview Completed", the ***Run Configuration*** button in the ***Summary Report*** window will be displayed. Once the statistics in the report are conformable, then click ***Run Configuration*** button to execute the scheduled custom archive job.
3. The execution of the configuration might take several minutes to complete. Get back to the Status Monitor to check the status after sometime.
4. On successful execution of the custom archive job, the status turns to '***Process Completed***'.
5. The last column in the report contains 'Details' appears for each table. To view detailed report of table, click Details hyperlink adjacent to the intended table. A Details Report popup window is displayed with information of the corresponding table.



Suppose if the archival process fails then the status will be shown as 'Archival Failed'. In such cases, click ***PREVIEW*** button and then click ***Rerun Configuration*** button in the ***Summary Report*** window, to re-execute the configurations.

- Use the horizontal scroll in the popup window, to view more details of the archive process for each table in the configuration.
- Use vertical scroll to view more tables in the configuration.

4 About Solix Technologies

Solix Technologies, Inc. is a leading provider of Enterprise Data Management solutions for public and private clouds. Solix data growth solutions help businesses improve application performance, reduce storage costs and meet compliance and data privacy requirements by achieving Information Lifecycle Management (ILM) goals. The Solix Cloud provides a pay-as-you-go model for database archiving and application retirement. The Solix Enterprise Data Management Suite (EDMS) software enables organizations to implement Database Archiving, Test Data Management (Data Subsetting), Data Masking and Application Retirement across all enterprise data. Solix Technologies is headquartered in Santa Clara, California and operates worldwide through an established network of value added resellers (VARs) and systems integrators.

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