Archiving
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Discover how to archive orders in OLIB Acquisitions.
►Archives

Overview

OLIB includes an archiving facility which enables you to move completed or cancelled orders (and associated order items) and completed invoices (and associated invoice items) from the live system to an archive database.

A system level parameter defines the number of days from when an order was entered to when it is automatically archived once the order is flagged as Complete or Cancelled. When this parameter is set, an overnight process identifies which orders are due to be archived, copies them and their associated order items into an archive database and deletes them from the live system.

Similarly, a system-level parameter defines the number of days from when an invoice was entered to when it is automatically archived once it is flagged as Complete. When this parameter is set, an overnight process identifies which invoices are due to be archived, copies them and their associated invoice items into an archive database and deletes them from the live system.

Procedure

1. Go to System Administration> OLIB Defaults.
2. Enter a value in the Archive Orders After setting. This defines the archive wait period for completed/cancelled orders. The maximum value is 999.
3. Enter a value in the Archive Invoices After setting. This defines the archive wait period for completed invoices. The maximum value is 999.
4. Enter a value for how many days to keep the archive copy.

Note: An appropriate archive setting would be 730, i.e. archive complete/cancelled orders and completed invoices two years after they were entered once they are flagged as completed/cancelled.

Review archived orders and invoices

1. Go to Archives>Archived Orders, Archived Order Items, and Archived Invoices domains.
2. Carry out the relevant search to view the archived data.

These domains operate like the standard Orders, Order Items and Invoices domains for searching, filtering, sorting, displaying records, etc., except that the search options are more limited and it is not possible to add or edit records.
Archived order items and invoices are also visible in the Account Instances domain, in the Order Items and Invoices sheets.

To 'un-archive' a record:

1. In the hitlist select the order, order item, or invoice to 'un-archive'.
2. In the Other Actions drop-down list, select Unarchive order.

The un-archived item will then be visible in the Orders, Order Items, Invoices domain.