

# Archive Overview

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Starting with V10.0, Cora SeQUENCE has been renamed to Cora Orchestration.

## V9.9 and later

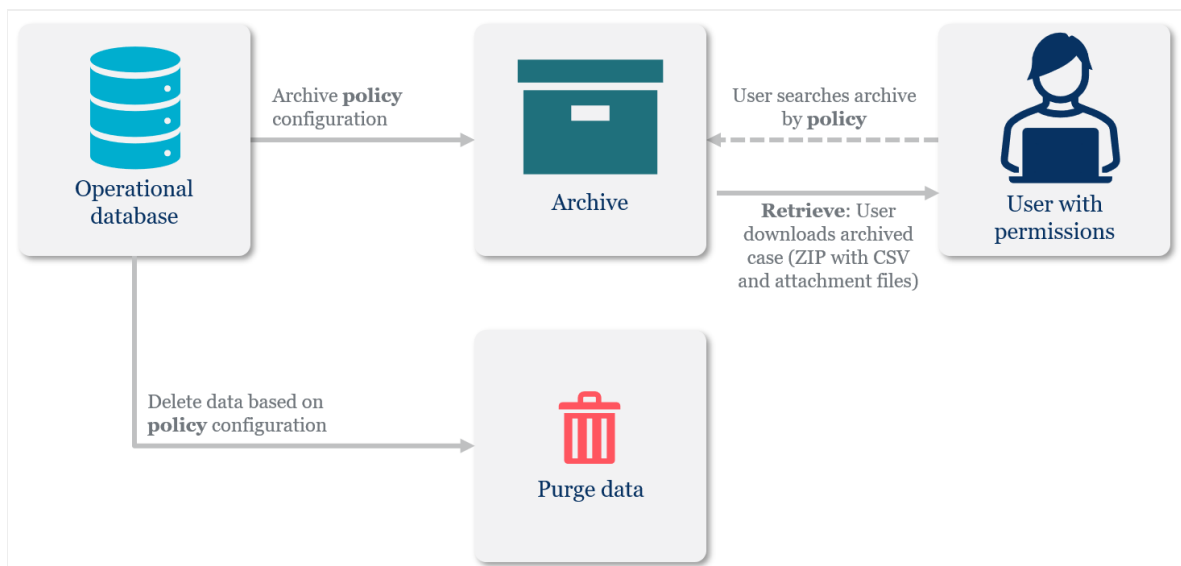
### Overview

The archiving mechanism helps you meet business and legal requirements for storing and retrieving data. Besides effective maintenance and costs, archiving also enables efficient data management and boosts your system's performance, by keeping the operational database lighter.

### Main benefits

- Flexible storage and purging policy configuration
- User-friendly interface to search and retrieve archived data
- Permission-based access to archived data
- Support various storage solutions: Amazon S3 (Simple Storage Service), Azure Files, and network drives

The archiving mechanism extracts data from the operational database and moves it to the archive database, making sure that only operational data resides in the product database. Only users with permissions can view and download archived data. You define permissions when setting up the archive policy.



Archiving makes sure that you are complying with the organization data retention policies.

### Configuration

The archive feature involves the following components:

Administration site	Job Execution Service (JES)	Portal
<p>You configure the archiving policy in the Administration site, at <b>Administration&gt;Archiving&gt;Policy Management</b>.</p> <p>The archiving policy specifies the:</p> <ul style="list-style-type: none"> <li>• Workflow space GUID</li> <li>• Criteria for archival (time range from case completion or specific date)</li> <li>• Index fields available for searching and filtering</li> <li>• Tables to be archived (parent and/or child)</li> <li>• Action to be taken on the defined data: archive, delete, or exclude.</li> <li>• Permissions for accessing the archived data on the portal</li> </ul>	<p>You configure the following archiving jobs at <b>Administration&gt;Global Settings&gt;Jobs Management</b>.</p> <ul style="list-style-type: none"> <li>• Archiving Data Collector</li> <li>• Archiving Data Worker</li> <li>• Archiving Data Cleaner</li> <li>• Archiving Files Worker</li> <li>• Archiving Data Retriever</li> </ul>	<p>End-users retrieve archived data from the Archive page on the portal.</p> <ul style="list-style-type: none"> <li>• Only users with the permissions to a configured policy can access the Archive page.</li> <li>• Users search the archived data by policy and can filter the retrieved results by the parameters configured for the specific policy.</li> <li>• Users can select a case and download its archived data.</li> <li>• The archived data is downloaded as a ZIP file that includes case metadata in CSV format, case emails, and case attachment files.</li> </ul>

### Archived data

- Workflow instances that match the archiving configuration settings are referred to as the "archiving population". For example, if archiving is set for one year, then a master workflow that has been closed for one year will be archived along with its sub workflows.
- You can have different archiving configurations for different workflow spaces according to variables and time filters. The archiving is performed per master workflow instance ID.

### Excluded data

- The archiving configuration allows you to exclude some workflow templates and tables from archiving. These *excluded items* are not archived even if the policies define them as part of the archiving population.
- You configure archiving exclusions at **Administration>Archiving>System Exclusions**.

### Deleted data

- Data that has been archived is permanently deleted from the operational database.
- You can configure a policy that deletes unnecessary data without archiving it.

For details on setting archive policies and configuring the archive jobs, see [this article](#).

### Deployment

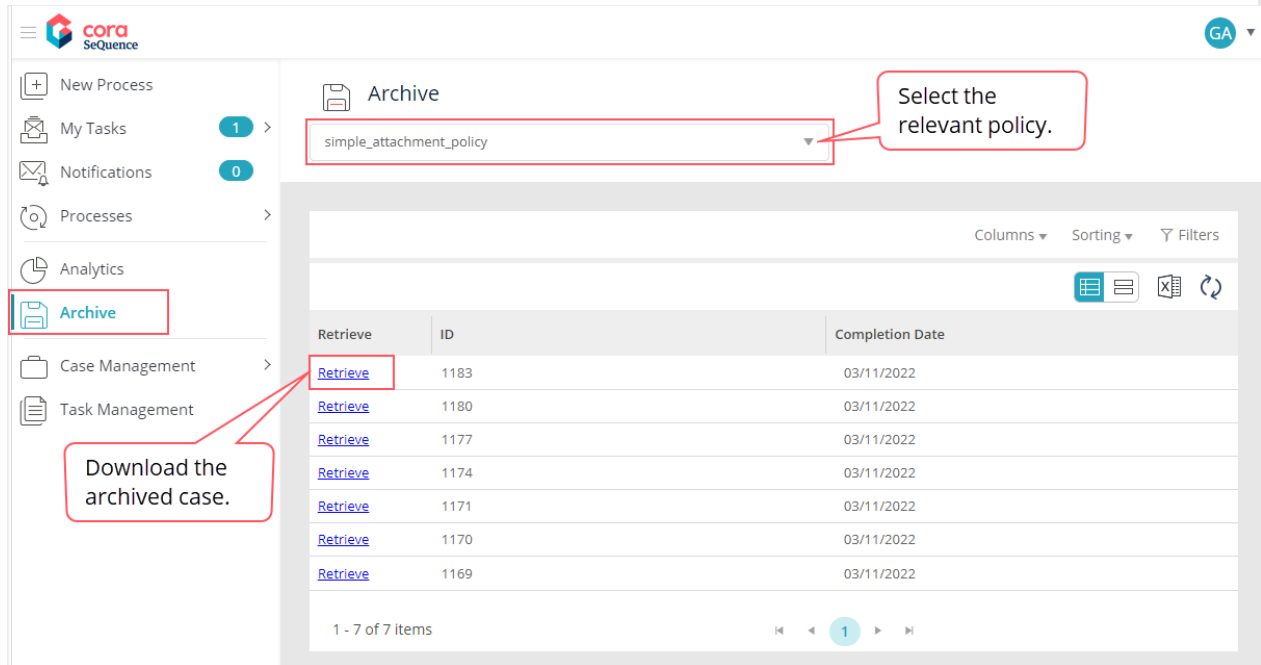
The archive feature is deployed with the applications. There are no special procedures.

Make sure that the archive database or storage location is set up before you configure archiving policies.

## Data retrieval

When archiving is configured in the system, portal displays a new menu item that opens the Archive page. Only users with the *required permissions* can access archived data.

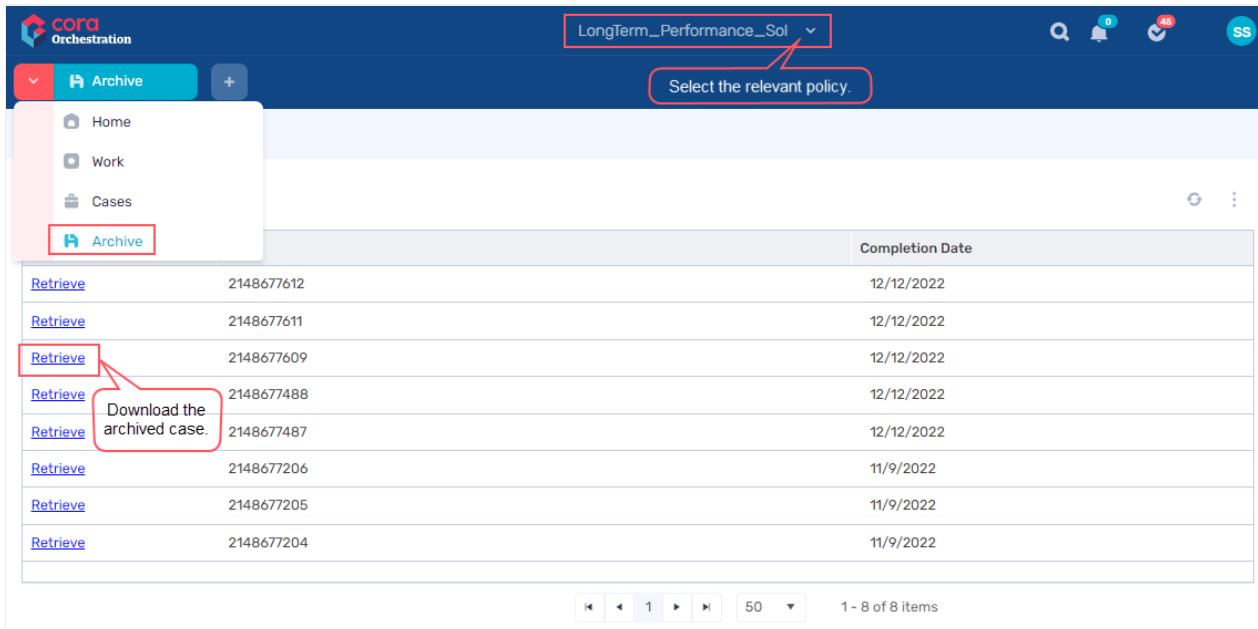
### In Flowtime (V9.9 and 9.9.x)



The screenshot shows the 'Archive' page in Flowtime. The left sidebar contains a menu with 'Archive' highlighted. The main content area shows a table with columns 'Retrieve', 'ID', and 'Completion Date'. A dropdown menu is open above the table, showing 'simple\_attachment\_policy'. A callout points to this dropdown with the text 'Select the relevant policy.' Another callout points to the 'Retrieve' link in the first row of the table with the text 'Download the archived case.'

Retrieve	ID	Completion Date
<a href="#">Retrieve</a>	1183	03/11/2022
<a href="#">Retrieve</a>	1180	03/11/2022
<a href="#">Retrieve</a>	1177	03/11/2022
<a href="#">Retrieve</a>	1174	03/11/2022
<a href="#">Retrieve</a>	1171	03/11/2022
<a href="#">Retrieve</a>	1170	03/11/2022
<a href="#">Retrieve</a>	1169	03/11/2022

### In Portal (V10.1 and later)



The screenshot shows the 'Archive' page in Portal. The top navigation bar includes 'LongTerm\_Performance\_Sol' and a dropdown menu. The left sidebar contains a menu with 'Archive' highlighted. The main content area shows a table with columns 'Retrieve' and 'Completion Date'. A callout points to the dropdown menu with the text 'Select the relevant policy.' Another callout points to the 'Retrieve' link in the third row of the table with the text 'Download the archived case.'

Retrieve	Completion Date
<a href="#">Retrieve</a>	2148677612 12/12/2022
<a href="#">Retrieve</a>	2148677611 12/12/2022
<a href="#">Retrieve</a>	2148677609 12/12/2022
<a href="#">Retrieve</a>	2148677488 12/12/2022
<a href="#">Retrieve</a>	2148677487 12/12/2022
<a href="#">Retrieve</a>	2148677206 11/9/2022
<a href="#">Retrieve</a>	2148677205 11/9/2022
<a href="#">Retrieve</a>	2148677204 11/9/2022

The user can reorder, sort, and filter the Archive grid. The **case ID** and **completion date** are default columns. You can define additional columns when you configure the archive policy.

The user downloads the archived case in a ZIP file that includes all the data related to the case: files, such as images and documents in their original format and data files in CSV format.

The ZIP file includes two folders:

- Files: Contains all the files related to the case and a JSON file with the case's metadata.  
Naming convention: **<GUIDID>\_<filename>**
- Tables: Contains all the default tables and custom tables specified in the policy in CSV format. It also contains the tables' JSON and the tables' metadata JSON.
- ConversationView: Contains all the Conversation View items of the case. *Available from Cora SeQuence V9.9.1, and for Cora Orchestration V10.2 onwards.*
- EmailView: Contains the emails that were sent from the case. *Available from Cora SeQuence V9.9.1, and for Cora Orchestration V10.2 onwards.*

You can customize the Archive grid's look and feel.