

Archive Overview

Last Modified on 07/10/2024 9:42 am EDT

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

V9.9 and later

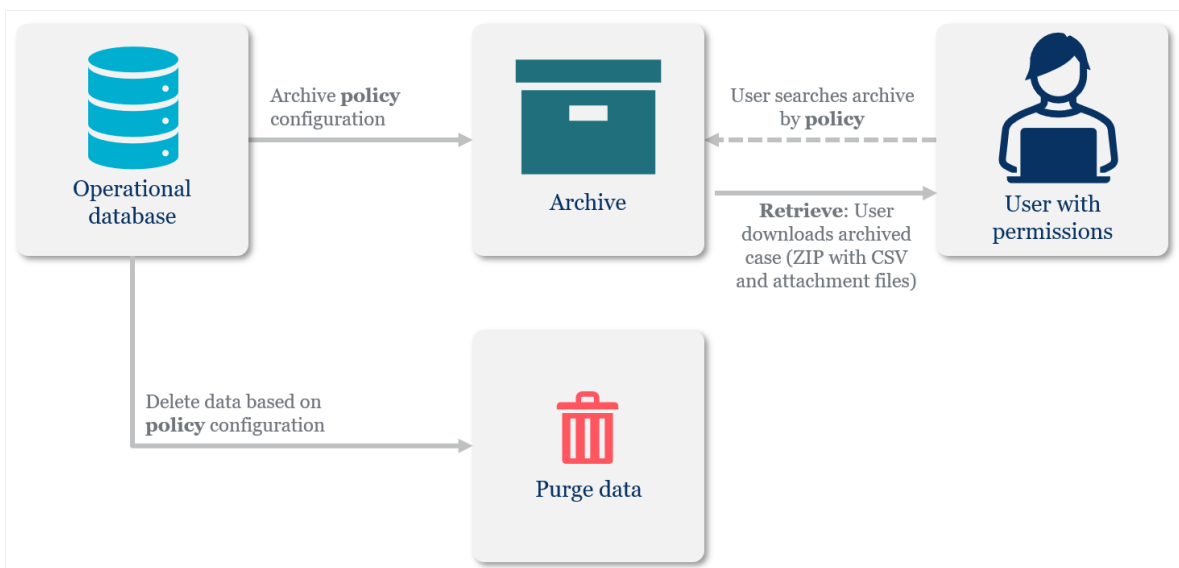
Overview

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.

The supported storage types for archive are AWS S3, Azure File Storage and Network Storage.

IMPORTANT

Archiving is irreversible. After archiving, the data is deleted from the Cora Orchestration operational database.

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

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 Cora SeQuence interface. On the left sidebar, the 'Archive' menu item is highlighted. The main content area shows the 'Archive' page with a dropdown menu for 'simple_attachment_policy'. A callout box points to this dropdown with the text 'Select the relevant policy.' Below the dropdown is a table with the following data:

Retrieve	ID	Completion Date
Retrieve	1183	03/11/2022
Retrieve	1180	03/11/2022
Retrieve	1177	03/11/2022
Retrieve	1174	03/11/2022
Retrieve	1171	03/11/2022
Retrieve	1170	03/11/2022
Retrieve	1169	03/11/2022

A callout box points to the 'Retrieve' link in the first row with the text 'Download the archived case.'

In Portal (V10.1 and later)

The screenshot shows the Cora Orchestration interface. The top navigation bar has the 'Archive' menu item highlighted. Below it, a dropdown menu for 'exportarchivingPolicy' is open. The main content area shows a table with the following data:

Actions	ID	Completion Date	Archived At
Retrieve	37746	6/2/2024 2:38 PM	6/2/2024 2:40 PM
Retrieve	37747	6/2/2024 2:45 PM	6/2/2024 2:46 PM
Retrieve	37748	6/2/2024 3:07 PM	6/2/2024 3:08 PM
Retrieve	37749	6/2/2024 3:11 PM	6/3/2024 6:37 AM
Retrieve	37795	6/3/2024 12:52 PM	
Retrieve	37796	6/3/2024 12:54 PM	
Retrieve	37847	6/5/2024 8:58 AM	
Retrieve	37851	5/5/2024 9:20 AM	

A callout box points to the 'Retrieve' link in the first row.

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

The column *Archived At* is available in the grid *from V10.6 onwards*.

From V10.6 onwards, the archive grid also has an option to export to Excel.

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

The ZIP file includes four 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.*
From V10.5 onwards, the conversation items are available in .EML format also.
- EmailView: Contains the emails that were sent from the case. *Available from Cora SeQUENCE V9.9.1, and for Cora Orchestration V10.2 onwards.*
From V10.5 onwards, the sent emails are available in .EML format also.

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