



## Archiver

# Batch Process Guide

Version 24.x  
Last Modified 24.0 | March 2024

© 2024 AssetWorks Inc., its subsidiaries and affiliates. All rights reserved.

Private and Confidential. Not for public dissemination.

Information contained in this document is proprietary to AssetWorks Inc. and may be used or disclosed only with written permission from AssetWorks Inc. This guide, or any part thereof, may not be reproduced without the prior written permission of AssetWorks Inc. This document refers to numerous products by their trade names. In most, if not all, cases these designations are claimed as Trademarks or Registered Trademarks by their respective companies. This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of AssetWorks Inc. The names of companies and individuals used in the sample database and in examples in the manuals are fictitious and are intended to illustrate the use of the software. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

## Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: [M5Support@AssetWorks.com](mailto:M5Support@AssetWorks.com)

Website: [Community.AssetWorks.com](https://Community.AssetWorks.com)

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

# Archiver - Batch Process Guide

Version 24.x

Last Modified 24.0 | March 2024

## Contents

|  |           |
|--|-----------|
| <b>Overview</b>                          | <b>1</b>  |
| <b>1. Fuel Transaction Detail</b>        | <b>2</b>  |
| <b>2. Indirect Account Detail</b>        | <b>2</b>  |
| <b>3. Parts Detail</b>                   | <b>3</b>  |
| <b>4. Replacement Fund</b>               | <b>4</b>  |
| <b>5. Telematics</b>                     | <b>5</b>  |
| <b>6. Unit Availability Detail</b>       | <b>6</b>  |
| <b>7. Unit Detail</b>                    | <b>7</b>  |
| <b>8. Work Order Detail</b>              | <b>8</b>  |
| <b>9. Executing the Archiver Process</b> | <b>9</b>  |
| Run Archiver Section                     | 10        |
| List of Archive Types & Schedule Details | 11        |
| <b>Updates</b>                           | <b>12</b> |

## Overview

The Archiver batch process moves and stores older data that no longer needs to be readily available in active M5 tables. The program moves the data from various tables based on the type of transaction. M5 provides the ability to archive eight types of data transactions.

1. Fuel Transaction Detail
2. Indirect Account Detail
3. Parts Detail
4. Replacement Fund
5. Telematics
6. Unit Availability Detail
7. Unit Detail
8. Work Order Detail

Tables and selection criteria for each transaction are listed below.

- The program writes the selected data to an archive table that is not available for viewing in the M5 application.

## 1. Fuel Transaction Detail

| ARC_TYPE   | TABLE_NAME      | WHERE_CLAUSE   |
|------------|-----------------|--|
| FUELDETAIL | F_COMM_PROD_CHG | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#)        |
| FUELDETAIL | F_TRANS_LOG     | (company=#COMPANY# and xaction_date is not NULL and xaction_date <= #ARCHIVEDATE#) |
| FUELDETAIL | F_UNIT_PROD_CHG | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#)        |
| FUELDETAIL | FUEL_TAX_TRANS  | (company=#COMPANY# and trans_dt is not NULL and trans_dt <= #ARCHIVEDATE#)         |

## 2. Indirect Account Detail

| ARC_TYPE     | TABLE_NAME          | WHERE_CLAUSE  |
|--------------|---------------------|---|
| INDACCDetail | ACC_COMM_CHG        | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#) |
| INDACCDetail | ACC_LAB_CHG         | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#) |
| INDACCDetail | ACC_PART_CHG        | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#) |
| INDACCDetail | F_ACC_COMM_PROD_CHG | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#) |
| INDACCDetail | F_ACC_PROD_CHG      | (company=#COMPANY# and int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#) |

### 3. Parts Detail

| ARC_TYPE   | TABLE_NAME       | WHERE_CLAUSE   |
|------------|------------------|--|
| PARTDETAIL | PART_HIST        | (company=#COMPANY# and fisc_pd <= (select fisc_pd from calendar_days where cal_date = #ARCHIVEDATE#))  |
| PARTDETAIL | PART_ORDERS      | company=#COMPANY# and po_id in ( select po_id from mfive.PART_PO where company=#COMPANY# and lt_status_dt IS NOT NULL and lt_status_dt <= #ARCHIVEDATE#)     |
| PARTDETAIL | PO_NOTES         | company=#COMPANY# and po_id in ( select po_id from mfive.PART_PO where company=#COMPANY# and lt_status_dt IS NOT NULL and lt_status_dt <= #ARCHIVEDATE#)     |
| PARTDETAIL | PART_PO          | (company=#COMPANY# and lt_status_dt IS NOT NULL and lt_status_dt <= #ARCHIVEDATE#)   |
| PARTDETAIL | PART_PI_CNT      | company=#COMPANY# and pi_id in ( select pi_id from mfive.PART_PI where company=#COMPANY# and pi_dt IS NOT NULL and pi_dt <= #ARCHIVEDATE#)                   |
| PARTDETAIL | PART_PI_SEL      | company=#COMPANY# and pi_id in ( select pi_id from mfive.PART_PI where company=#COMPANY# and pi_dt IS NOT NULL and pi_dt <= #ARCHIVEDATE#)                   |
| PARTDETAIL | PART_PI          | (company=#COMPANY# and pi_dt IS NOT NULL and pi_dt <= #ARCHIVEDATE#)   |
| PARTDETAIL | PART_TFR         | (company=#COMPANY# and status_dt IS NOT NULL and status_dt <= #ARCHIVEDATE#)   |
| PARTDETAIL | PO_CONTRACT_BOND | company=#COMPANY# and contract_no in ( select contract_no from mfive.po_contract where company=#COMPANY# and end_dt IS NOT NULL and end_dt <= #ARCHIVEDATE#) |
| PARTDETAIL | PO_CONTRACT_DESC | company=#COMPANY# and contract_no in ( select contract_no from mfive.po_contract where company=#COMPANY# and end_dt IS NOT NULL and end_dt <= #ARCHIVEDATE#) |
| PARTDETAIL | PO_CONTRACT_I    | company=#COMPANY# and contract_no in ( select contract_no from mfive.po_contract where company=#COMPANY# and end_dt IS NOT NULL and end_dt <= #ARCHIVEDATE#) |
| PARTDETAIL | PO_CONTRACT_NOTE | company=#COMPANY# and note_key in ( select contract_no from mfive.PO_CONTRACT where company=#COMPANY# and end_dt IS NOT NULL and end_dt <= #ARCHIVEDATE#)    |
| PARTDETAIL | CONTRACT_ITEM    | company=#COMPANY# and contract_no in (select contract_no from mfive.PO_CONTRACT where company=#COMPANY# and end_dt IS NOT NULL and end_dt <= #ARCHIVEDATE#)  |

|            |                     |   |
|------------|---------------------|---|
| PARTDETAIL | F_PROD_ORDER        | company=#COMPANY# and po_no in (select po_no from f_prod_order_header b where b.company=#COMPANY# and b.contract_no in (select contract_no from po_contract c where c.company=#COMPANY# and c.end_dt is not null and c.end_dt <= #ARCHIVEDATE#))      |
| PARTDETAIL | F_PROD_ORDER_HEADER | company=#COMPANY# and contract_no in (select contract_no from mfive.PO_CONTRACT where company=#COMPANY# and end_dt is not null and end_dt <= #ARCHIVEDATE#)   |
| PARTDETAIL | PO_CONTRACT         | (company=#COMPANY# and end_dt IS NOT NULL and end_dt <= #ARCHIVEDATE# and contract_no not in (select contract_no from part_orders where company = #COMPANY#))   |
| PARTDETAIL | O_PART_CHG          | company=#COMPANY# and wo_no in (select wo_no from mfive.O_WO where w.company=#COMPANY# and w.close_dt is not NULL and w.close_dt <= #ARCHIVEDATE#)  |
| PARTDETAIL | PART_JNL            | (company=#COMPANY# and int_trans_dt != 0 and int_trans_dt <= #ARCHIVEDATE#) and part_jnl_id NOT IN (select o.part_jnl_id from o_part_chg o where o.company=#COMPANY# union all select o2.r_part_jnl_id from o_part_chg o2 where o2.company=#COMPANY#) |

## 4. Replacement Fund

Data from two tables is displayed on the Unit Replacement Fund Manager frame. Those tables are REPLFUND\_TRANS AND REPLACE\_FUND. REPLFUND\_TRANS contains individual contribution and withdrawal records, which are displayed on the frame's History tab. REPLACE\_FUND contains the replacement fund code and account balance. The data from REPLACE\_FUND appears on the Detail tab.

When running the archiver, the records from REPLFUND\_TRANS will be archived and records from REPLACE\_FUND will not. This means that individual transaction records will be removed from the History tab but the replacement funds' main records will still exist and balances will still be available on the Detail tab along with the total contributions and withdrawals for the current period, current year, and previous year.

## 5. Telematics

| ARC_TYPE   | TABLE_NAME  | WHERE_CLAUSE  |
|------------|-------------|---|
| TELEMATICS | TM_READINGS | (company=#COMPANY# and reading_dt is not null and reading_dt <= #ARCHIVEDATE#)  |
| TELEMATICS | TM_ALERTS   | (company=#COMPANY# and read_wo_no is null and read_work_req_no is null and read_dt is not null and read_dt <= #ARCHIVEDATE#)  |
| TELEMATICS | TM_MESSAGES | (company=#COMPANY# and tm_message_id not in (select start_tm_message_id from tm_alerts) and tm_message_id not in (select last_tm_message_id from tm_alerts) and tm_message_id not in (select tm_message_id from tm_readings)) |



## 6. Unit Availability Detail

| ARC_TYPE    | TABLE_NAME        | WHERE_CLAUSE  |
|-------------|-------------------|---|
| AVAILDETAIL | OPER_STATUS_HIST  | (company=#COMPANY# and eff_dt < (select max(eff_dt) from mfive.oper_status_hist a where disposition_cd = '1' and oper_status_hist.unit_id = a.unit_id)) and (eff_dt <= #ARCHIVEDATE#)   |
| AVAILDETAIL | OPER_REQUIRE_HIST | (company=#COMPANY# and eff_dt not in (select max(eff_dt) from mfive.oper_require_hist a where oper_require_hist.oper_entity = a.oper_entity and oper_require_hist.oper_class = a.oper_class and oper_require_hist.line = a.line)) and (eff_dt <= #ARCHIVEDATE#) |

## 7. Unit Detail

| ARC_TYPE   | TABLE_NAME           | WHERE_CLAUSE  |
|------------|----------------------|---|
| UNITDETAIL | BILL_ADJUST          | (company=#COMPANY# and<br>int_eff_dt != 0 and int_eff_dt <= #ARCHIVEDATE#)  |
| UNITDETAIL | F_COMM_PROD_CHG      | (company=#COMPANY# and<br>int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#)  |
| UNITDETAIL | F_TRANS_LOG          | (company=#COMPANY# and<br>xaction_date IS NOT NULL and<br>xaction_date <= #ARCHIVEDATE#)  |
| UNITDETAIL | F_UNIT_PROD_CHG      | (company=#COMPANY# and<br>int_issue_dt != 0 and int_issue_dt <= #ARCHIVEDATE#)  |
| UNITDETAIL | FUEL_TAX_TRANS       | (company=#COMPANY# and<br>trans_dt IS NOT NULL and trans_dt<br><= #ARCHIVEDATE#)  |
| UNITDETAIL | MPOOL                | (company=#COMPANY# and<br>int_return_dt != 0 and int_return_dt <= #ARCHIVEDATE#)  |
| UNITDETAIL | UNIT_DOWNTIME_DETAIL | company=#COMPANY# and<br>downtime_id in (select downtime_id<br>from mfive.UNIT_DOWNTIME where<br>company=#COMPANY# and end_dt<br>IS NOT NULL and end_dt <= #ARCHIVEDATE#) |

## 8. Work Order Detail

| ARC_TYPE | TABLE_NAME  | WHERE_CLAUSE   |
|----------|-------------|--|
| WODETAIL | O_COMM_CHG  | company=#COMPANY# and wo_no in (select wo_no from mfive.O_WO w where w.company=#COMPANY# and w.close_dt is not NULL and w.close_dt <= #ARCHIVEDATE#) |
| WODETAIL | O_PART_CHG  | company=#COMPANY# and wo_no in (select wo_no from mfive.O_WO w where w.company=#COMPANY# and w.close_dt is not NULL and w.close_dt <= #ARCHIVEDATE#) |
| WODETAIL | O_LABOR_CHG | company=#COMPANY# and wo_no in (select wo_no from mfive.O_WO w where w.company=#COMPANY# and w.close_dt is not NULL and w.close_dt <= #ARCHIVEDATE#) |
| WODETAIL | O_NOTE      | company=#COMPANY# and wo_no in (select wo_no from mfive.O_WO w where w.company=#COMPANY# and w.close_dt is not NULL and w.close_dt <= #ARCHIVEDATE#) |

## 9. Executing the Archiver Process

Navigate to the Batch Process Manager frame and select Archiver from the dropdown menu.

SAVE

UNDO

REFRESH

DELETE

FIND

### Batch Process Manager

Batch Process:

▼

ABC Class Assignments

Allocation

Archiver

Close Billing Period

End Of Day

End Of Period

Forecaster

Part History

Parts Requisitions

Planned Absence

Repeat Work

Run Billing period

Sold Units Archive

Unit/Component Record Purge

Work Request Planner

Exclude weekends and holidays:

☐

ded 0 records)

| ID | Description | Status | Schedule Date | Last Run | Frequency | Exclude Holidays | Submitted By | Run Desc |  |
|----|-------------|--------|---------------|----------|-----------|------------------|--------------|----------|--|
|----|-------------|--------|---------------|----------|-----------|------------------|--------------|----------|--|

## Run Archiver Section

The screenshot shows the 'Batch Process Manager' interface. At the top, there are five buttons: 'SAVE' (blue), 'UNDO' (grey), 'REFRESH' (blue), 'DELETE' (grey), and 'FIND' (blue). Below these buttons is the title 'Batch Process Manager'. Under the title, there is a label 'Batch Process:' followed by a dropdown menu currently showing 'Archiver'. Below this is a section titled 'Run Archiver' which contains several input fields: 'Date/Time to Start Run:' with a text box containing '11/12/2019 09:48:14' and a clock icon; 'Archive data through:' with an empty text box and a calendar icon; 'Database User ID:' with a blue masked text box; 'Password:' with a blue masked text box; 'Look Back Value:' with a text box containing '7'; 'Look Back Term:' with a dropdown menu showing 'Year'; and 'Unit Type:' with a dropdown menu showing 'Sold'.

1. Enter the Date/Time to start the batch process.
2. Enter the through date for which the program will archive data.
3. Enter the database user.
  - For Oracle clients the database user archives all companies within the database. For example, if your organization has two companies, both are archived.
  - For SQL Server clients, it is recommended to run this batch process through mfiveapp database user.
4. Enter the database user's password.
5. The Look Back Value, Look Back Term, and Unit Type are locked fields used in a separate batch process called Sold Units Archive. They are not editable.

## List of Archive Types & Schedule Details

List of Archive Type (Loaded 8 records)

| Type of Archive          | Do this archive                     |  |
|--------------------------|-------------------------------------|--|
| Fuel Transaction Detail  | <input type="checkbox"/>            |  |
| Indirect Account Detail  | <input checked="" type="checkbox"/> |  |
| Parts Detail             | <input type="checkbox"/>            |  |
| Replacement fund         | <input type="checkbox"/>            |  |
| Telematics               | <input type="checkbox"/>            |  |
| Unit Availability Detail | <input type="checkbox"/>            |  |
| Unit Detail              | <input type="checkbox"/>            |  |

Schedule Details

Run Interval:

Once ▼

Exclude weekends and holidays:

☐

Schedule / Reschedule

6. Select the checkbox in the Do this archive column to select the type or types of data to archive during the batch process execution. You can select multiple options.
7. Select the Run Interval. Options are once, minutes, hours, days, months. You can select the exclude weekends and holidays checkbox.
8. Select Schedule/Reschedule to schedule the batch process.
9. You can view the current execution schedule on the i-frame.

## Updates

| Release | Section      | Description  |
|---------|--------------|--|
| 23.2    | All sections | Applied miscellaneous writing style updates throughout the document. |