IBM Cúram Social Program Management
Version 7.0.10

IBM Cúram Archiving Guide

IBM

Note

Before using this information and the product it supports, read the information in "Notices" on page 17

Edition

This edition applies to IBM® Cúram Social Program Management v7.0.10 and to all subsequent releases unless otherwise indicated in new editions.

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Chapter 1. IBM Cúram Archiving

IBM Cúram Archiving provides the ability to archive historical data in its original business context, as well as to query and restore the data. IBM Cúram Archiving works with IBM InfoSphere® Optim™ Archive Enterprise Edition to provide a set of Cúram templates for the archival of business and technical objects including tables and relationships, and selection criteria to identify all records that should be moved into an archiving environment.

Note: The IBM Cúram Archiving documentation refers to the Optim tool as IBM InfoSphere Optim Archive Enterprise Edition. However, the documentation includes links to generic Optim documentation where the Optim tool is referred to as InfoSphere Optim Data Growth Solution.

Installing IBM Cúram Archiving

This topics in this section describe how to install IBM Cúram Archiving .

Introduction to IBM Cúram Archiving

This guide describes how to install and configure IBM Cúram Archiving for IBM Cúram Social Program Management. As part of the installation and configuration process, you must also install the IBM InfoSphere Optim Archive Enterprise Edition solution, which is the core archiving technology used.

The Optim Archive solution uses the Graphical User Interface (GUI), which can archive or process data in most platforms and data sources.

Solution components
IBM Cúram Archiving consists of two components, which are the Optim Archive solution and the Optim access definitions.

You must install the Optim Archive solution, which provides the core archiving technology, as part of the installation and configuration process. The Optim access definition files are required to execute archive and restore processing.

See "Installing and configuring the Optim Archive solution components" on page 2.

For information about configuring the Optim Archive solution for IBM Cúram Social Program Management, see Importing the Optim Access Definition files for IBM Cúram Archiving.

Hardware and software requirements
The recommended configuration (for optimum performance) uses a server dedicated to database processing.

For the hardware and software requirements related to all the supported operating environments, see the Detailed System Requirements document.

Archiving in IBM Cúram Social Program Management
IBM Cúram Archiving archives and restores data within the Cúram database.

IBM Cúram Archiving provides access definitions that define the data to be archived for a set of Cúram templates.

The following is a list of the Cúram templates.

- AuthenticationLog
- AuthorisationLog
- CaseEvent
- CaseTransactionLog
- CREOLECaseDeterminationData

- CREOLEProgramRecommendationData
- PrecedentChangeSet
- ProcessInstance

Installing and configuring the Optim Archive solution components

IBM Cúram Archiving provides capabilities to archive historical transaction records from mission-critical database applications.

IBM Cúram Archiving allows you to do the following:

- Extract sets of relational data from one or more databases and store the data for future use.
- Archive old data in a precise manner and optimize production databases for peak performance.
- Browse or selectively restore archived data as needed.

For more information, see InfoSphere Optim Data Growth Solution.

Installing the Optim Archive solution components

To install the Optim Archive solution components, refer to the information in the IBM InfoSphere Optim Archive Enterprise Edition product documentation. Note the requirements that relate to the extraction of the installation files.

When you install IBM Cúram Archiving , extract the `IBM Curam Archiving Install.zip` file so that the `swidtag` directory is copied directly into the `Optim_Root_Installation` directory. If you extract the `IBM Curam Archiving Install.zip` file to a different location, then you must manually copy the `swidtag` directory to the `Optim_Root_Installation` directory. By default, the `Optim_Root_Installation` directory is in the following directory:

Windows
    `C:\IBM\InfoSphere\Optim`

Linux
    `/opt/IBM/InfoSphere/Optim`

InfoSphere Optim solution components
Installing InfoSphere Optim solution components

Configuring the Optim Archive solution components

To configure the Optim Archive solution components, refer to the information in the IBM InfoSphere Optim Archive Enterprise Edition product documentation.
Configuring InfoSphere Optim solution components

Configuring InfoSphere Optim Designer

Refer to the IBM Knowledge Center for detailed information about how to configure Optim Designer.
Configuring Optim Designer

Configuring the Optim Archive solution for an Optim directory

Use the Configuration feature to configure the Optim Archive solution for an Optim directory.

Optim Designer supports only those Optim directories that use Unicode characters and the following DBMSs:

- IBM DB2® for Linux, UNIX, Windows v9.5 and above
- Oracle v11.1 and above
- Microsoft SQL Server v2008 and above

For detailed instructions about how to configure the Optim Archive solution for an Optim directory, see Configuring IBM InfoSphere Optim for an Optim Directory.

Importing Optim access definitions and upgrading Optim directory objects
Optim provides links to detailed information about how to import Optim access definitions and upgrade Optim directory objects.

Importing the Optim Access Definition files for IBM Cúram Archiving

Upgrading Optim directory objects

Configuring the server
The server processes the service requests made from the other components.

Before the server can accept service requests, you must configure the server for your environment. The process through which you configure the server depends on the operating system on which the server is installed.

See the detailed information about configuring the server.

Configuring InfoSphere Optim Connection Manager, InfoSphere Optim Manager, and InfoSphere Optim Service Interface
Optim Connection Manager, Optim Manager, and Optim Service Interface are the web applications that must be deployed to a Java EE-compliant application server.

See the detailed information about configuring the connection manager, the manager, and the service interface.

Managing the Optim Archive solution
The Optim Archive solution provides several functions.

The functions include the following:

- Archive the relationally intact data set subjected to business rules.
- Delete the data that are identified as candidate records during the archive process.
- Restore the data to production database if necessary.

See the detailed information about managing data growth.

Designing data management processes with Optim Designer
You can use Optim Designer to define data sources, data models and data management services.

See the detailed information about how to design data management processes with Optim Designer.

Running test- or production-level services
You can use Optim Manager with other Optim Archive solution components to run test- or production-level services that are developed with Optim Designer.

See the detailed information about how to run test- or production-level services.

Installing and configuring the IBM Cúram Archiving solution

IBM Cúram Archiving uses the Optim Archive solution, which can archive or process data in most platforms and data sources.

Before you install the IBM Cúram Archiving solution, ensure that you have installed the Optim Archive solution from the Optim installation media. See Installing InfoSphere Optim solution components.

As part of the configuration, you must create a DB alias for each Cúram database or instance, giving the DB alias a name that is appropriate for your organization.

The Optim installation creates the Optim directory, a set of database tables that contain the definitions used by the solution, including the access definitions distributed with the solution and the relationship definitions developed specifically for your Cúram environment.

Setting up Optim for IBM Cúram Archiving
The location for installing the Optim Archive solution varies according to the environment for the Cúram Server.

If the Cúram Server resides on:

- A Windows Server, you must install Optim on the Enterprise Server or the database server. Optionally, you can install Optim on additional workstations.
- A UNIX Server, you must first install Optim on a Windows workstation. In addition, you must install and configure the Optim Server on a UNIX Server (Enterprise Server or database server).

When installing Optim, elect to have the **Optim Installation** facility place the product icons on your desktop.

Configuring Optim for IBM Cúram Archiving
This topic contains information about how to configure IBM Cúram Archiving .

Refer to "Installing and configuring the Optim Archive solution components" on page 2 for more information about configuring the Optim Archive solution.

Continue the Windows installation process using the **Configuration Tool** by doing the following:

- Double-click the **Optim Configuration** icon on your desktop.
- Click **Tasks** > **Configure the First Workstation** on the main menu.

As you proceed through the Configuration dialogs, note the following:

- You must create a DB Alias for each Cúram database or instance.
- To restore data to a secondary archive database or reporting database, you must create a DB Alias for that secondary database.
- Skip the **Create Primary Keys** step during configuration.
- Skip the **Load/Drop Sample Data** step that creates the Optim sample database during configuration.
- Enable the **Optim Server** option when configuring the solution on the Cúram Server.

Note: Do not enable the **Optim Server** option when configuring the solution on a client workstation.

- To ensure that you can archive the required data, click **Product Options**, use the password **"Optim"** and change **Maximum Extract Rows** to 999999999 on the **General** tab, and then change **Maximum Commit Frequency** to 2000 or greater on the **Database** tab.
- You must edit **Personal Options** to set up both a Temporary Work Directory and a Data Directory.
- If the Cúram Server resides in a UNIX environment, you must install and configure the Server on UNIX after the Windows installation and configuration is complete. Follow the instructions in the *Optim Installation and Configuration Guide, Appendix A* to install and configure the Optim Server on a UNIX machine.

Importing the Optim Access Definition files for IBM Cúram Archiving

Access definitions delivered with IBM Cúram Archiving are needed to archive and restore your Cúram data. The access definitions must be imported from the `Defs\jde_release\Module\DBMS` directory on the Optim installation media for Cúram. The variables in this path are described in the table below.

Note: The instructions on this page apply to all installations of IBM Cúram Archiving .

```
AuthorisationLog
AuthenticationLog
CREOLECaseDeterminationData
CaseEvent
CREOLEProgramRecommendationData
CaseTransactionLog
PrecedentChangeSet
ProcessInstance
```

Table 1.		
Parameter	**Version**	**Description**
Cúram_release	7.0	The installed Cúram release. The module for which you want to archive data.
Template	ASN	AuthorisationLog
	ATN	AuthenticationLog
	CCDD	CREOLECaseDeterminationData
	CE	CaseEvent
	CPR	CREOLEProgramRecommendationData
	CTL	CaseTransactionLog
	PCS	PrecedentChangeSet
	PI	ProcessInstance
DBMS	DB2 LUW	IBM DB2 for Linux, Unix, and Windows
	DB2 for z/OS	IBM DB2 for Mainframe Systems
	ORACLE	Oracle Database

Note: See Archiving in IBM Cúram Social Program Management for details on which templates are supported.

The name of the import file that contains the Access Definition files is based on the template you want to use to archive data. For example, the name of the import file for the CaseTransactionLog template is OCUSPM70_CTL.txt.

Using a database where foreign keys are not enabled

If you are using a database where foreign keys are not enabled, import the Access Definition files for the following templates from the IBM Curam Archiving Install\Defs\ForeignKeysDisabled directory:

- CREOLECaseDeterminationData
- ProcessInstance
- PrecedentChangeSet
- CREOLEProgramRecommendationData

Using a database where foreign keys are enabled

If you are using a database where foreign keys are enabled, import all Access Definition files from the IBM Curam Archiving Install\Defs\ directory.

Things to do...

Before you import the Access Definition files, edit the import file that corresponds to your environment, and then import the Access Definition files. See Editing the import file and Importing the object definitions.

Editing the import file
Before you import the Optim templates for Cúram, you must edit each file.

About this task

Perform the following to edit the import file.

Procedure

1. In a text editor, locate and open the `IBM Curam Archiving Install\Defs \OCUSPM70_`*MODULE_NAME*`.txt` file for your environment, where *MODULE_NAME* is the module name.
   For example, the module name might be `OCUSPM70_CE.txt`.
2. Replace all occurrences of **SRCDBOWNER** with the name of the owner or schema for your database tables.
3. Replace all occurrences of **PSTAPP** with the name of the DB Alias used to access your database tables.
4. Save the edited import file on your local machine, and close the file.
5. Note the path for the saved file.
6. Repeat the steps for each template file.

Importing the object definitions
After you edit the import file, import the object definitions.

About this task

Perform the following to import the object definitions.

Procedure

1. Double-click the **Optim** desktop icon to start the Optim solution.
2. Click **Utilities** > **Import** on the Optim main window to display the Optim import window.
3. Click **Input File** on the import window and type the path and name of the import file you saved on your local machine. This is the path you noted in step 6 of "Editing the import file" on page 5.
4. Based on the contents of the import file, the Optim solution enables the appropriate check boxes in the **Definitions** tree on the import window to import the objects. For each of the following check boxes, if the check box is enabled, ensure that the check box is selected:

   - **Access Definition**
   - **Archive Request**
   - **Delete Request**
   - **Restore Request**
   - **Relationship**

5. Click the **Run** icon or click **File** > **Run** > on the import window to begin the import process.

   Note: The imported definitions may require modification if your Cúram database has been customized for your site.

6. Click **Tools** > **Show Process Log** on the import window to display the import process log. If any errors are listed on the log, repeat the steps in "Editing the import file" on page 5 to correct (if needed), and import the object definitions again.
7. Close the import process log dialog.
8. When the import is completed successfully, close the import dialog.
9. Close the Optim main window.

Archiving with IBM Cúram Archiving

The topics in this section describe how to archive your files with IBM Cúram Archiving .

Introduction to IBM Cúram Archiving

IBM Cúram Social Program Management (SPM) users, like the users of most applications, understand that performance can degrade significantly as database size grows. Because it is also understood that, as it

ages, a large percentage of data in the database is unlikely to be accessed daily, performance can be greatly improved if infrequently accessed data is removed from the production environment.

However, because this older data has significant business value it cannot simply be purged. The data is best archived and maintained in an active repository so that it can be retrieved when necessary. This is precisely the value that is provided by IBM Cúram Archiving .

As an example, a viewpoint that is commonly held by Cúram users is that the current and previous year's data must be maintained in the production tables, while data that are older than two years can be removed. Because it is common for business analysts to need access to the older data, it can be housed where analysts can query it; that is, in a mirrored set of archive tables or in a reporting database.

IBM Cúram Archiving uses the IBM InfoSphere Optim Archive Enterprise Edition as its core archiving technology, which can archive or process data in most platforms and data sources.

Archiving methods

Archive requests can be performed by using either the Optim Designer or the Optim Manager interface.

The Optim Archive solution performs all actual processing, with IBM Cúram Archiving providing Cúram specific templates that are required to carry out processing against the Cúram database. The Optim Archive solution allows for the entry of input parameters to specify the data that is to be archived or restored

Archiving using the Optim Archiving Solution

The Optim Archiving solution is the standard interface for archiving and restoring data in Cúram.

"Archiving and Restoring data using Optim Archive" on page 8 explains how to use the Optim Archiving Solution to both archive and restore Cúram data.

Archive processing overview

The Optim Archive solution uses access definitions to define the set of data to be archived (that is, the set of tables and criteria that are used to select rows). This document describes the access definitions that are available for a set of Cúram templates that can be used to archive and restore Cúram business and technical objects

Because the data for certain Cúram objects is spread across many tables and an object must meet a number of conditions to be eligible for archival, the solution is preconfigured to capture the business rules for candidate objects. The appropriate access definition is then combined with the user-supplied criteria and applied to the candidate data.

The solution determines which objects are eligible for archiving and deletion from the production database based on Cúram rules and the archive criteria you specified. The solution then begins the extract phase. During that phase, it reads the selected objects from the Cúram database and writes them to an archive file before it deletes any data from the database.

After data is archived, an authorized user can access or restore it, as described in Restore processing overview.

If necessary, you can modify the access definitions to accommodate site-specific database customizations. Refer to the Optim product documentation for information about how to customize templates at http://www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/ com.ibm.nex.optimd.common.doc/04acdefs/opcommon-c-access_definitions.html. It is also advised that thorough testing be completed to verify that the use of any customized templates with the Cúram database will work correctly and not cause any problems within the Cúram application.

For more information about the archive process, refer to the Optim product documentation at http:// www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/com.ibm.nex.optimd.dg.doc/topics/opdg-c-archiving_data.html.

Delete processing overview

Use the delete process to remove subsets of related data from a database. Specifications for the delete process can be stored as a delete request.

The source file does not change during the delete process and can be used to reload or restore the deleted data. You can use the delete process in combination with the archive or extract process to safely remove data from a database.

For more information about the delete process, refer to the Optim product documentation at http://www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/com.ibm.nex.optimd.dg.doc/topics/opdg-c-defining_data_to_delete.html.

Restore processing overview

After data is archived, an authorized user can restore it to the production database tables.

The restore process is a two step process. First, the archive file that contains the data to be restored must be selected and criteria for a selective restore can be specified. Second, the data is restored to the database with the insert or load process.

For more information about the restore process, refer to the Optim product documentation at http://www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/com.ibm.nex.optimd.dg.doc/topics/opdg-c-defining_data_to_restore.html.

Archiving and Restoring data using Optim Archive

The standard way of initiating archive or restore requests is through the use of Optim Archive, which is the core archiving technology.

Note: See Archiving methods for more information about the methods that are available to archive and restore Cúram data.

Before you archive data, confirm that the required Cúram template access definitions are installed, as described in Archiving by Cúram Template.

Archiving Cúram data by using Optim Archive

This task describes how to archive Cúram data by using Optim Archive.

About this task

For more information about how to archive by using Optim Designer, see the Optim product documentation at http://www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/com.ibm.nex.optimd.dg.doc/topics/opdg-c-defining_data_to_archive.html

Procedure

1. Open Optim by double-clicking on the Optim icon on your desktop.
2. Click **File** > **Open** on the Optim menu bar.
3. When the **Open an Archive Request** window is displayed, double-click **Archive Request** in the **Identifier** list, and then double-click **OCUSPM70**, which is the supplied default value. If you changed that value, then click the name that you specified. The available archive requests are displayed in the **Name** column.

   Depending on the type of data you archive, the following archive requests might be listed in the **Name** column:

Table 2.	
Request Name	**Archive Request for:**
OCUSPM70.ARASN	AuthorisationLog
OCUSPM70.ARATN	AuthenticationLog
OCUSPM70.ARCCDD	CREOLECaseDeterminationData

Table 2. (continued)	
Request Name	**Archive Request for:**
OCUSPM70.ARCE	CaseEvent
OCUSPM70.ARCPI	ProcessInstance
OCUSPM70.ARCPR	CREOLEProgramRecommendation
OCUSPM70.ARCTL	CaseTransactionLog
OCUSPM70.ARPCS	PrecedentChangeSet

> **Note:** See "Archiving by Cúram Template" on page 11 for information about the criteria that is used to archive rows for each of the request types.

4. To run one of the archive requests, double-click the appropriate **Archive Request Name**. For example, to run the **PrecedentChangeSet** archive request, double-click **OCUSPM70.ARPCS** to open the Archive Request Editor.

    When the Archive Request Editor is displayed, confirm that the archive file name is correct and **Defer Delete After Archive** option is checked.

5. Click on the **Variables** tab on the Archive Request Editor. When that tab is displayed, confirm that the **Always prompt for values at run time** option is checked if default values are specified in respective Access definitions variables tab.

6. Click the **Run** icon on the Archive Request Editor to start the archive process.

7. When the **Archive request displays variables** window is displayed, enter the value date parameter.

8. When the values are entered, click the **OK** button for the archive process to resume processing.

    The Archive Process Report shows the location of the archive file, the number of rows that are archived and deleted, and other information. See "Archive process report" on page 13 for more information about this report.

9. After you review the Archive Process Report, click **File** > **Close** to close the Archive Process Report, and then click **File** > **Close** to close the Archive Request Editor.

10. If you changed any of the request's previously saved parameters, a window appears. Click **Yes** to save your changes or click **No** to discard those changes.

Deleting Cúram data by using Optim Archive
Use Optim Archive to delete Cúram data.

About this task

For more information about how to use Optim Designer to delete, see the Optim documentation at http://www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/com.ibm.nex.optimd.dg.doc/topics/opdg-c-deleting_data_w_optim_designer.html.

Note: A Delete request is not applicable for the CREOLECaseDeterminationData template due to the nature in which the information is archived. For more information see "CREOLECaseDeterminationData" on page 11.

Procedure

1. Open Optim by double-clicking on the Optim icon on your desktop.

2. Click **File** > **Open** on the Optim menu bar.

3. When the **Open Delete Request** window is displayed, double-click **Delete Request** in the Identifier list, and then double-click **OCUSPM70**, which is the supplied default value (if you changed that value, click on the name that you specified).

    The available delete requests will then be displayed in the Name column. Depending on the type of data you archive, the following delete requests might be listed in the Name column.

Table 3.	
Request name	**Delete Request for ...**
OCUSPM70.DRASN	AuthorisationLog
OCUSPM70.DRATN	AuthenticationLog
OCUSPM70.DRCE	CaseEvent
OCUSPM70.DRCPI	ProcessInstance
OCUSPM70.DRCPR	CREOLEProgramRecommendation
OCUSPM70.DRCTL	CaseTransactionLog
OCUSPM70.DRPCS	PrecedentChangeSet

4. To run one of the above delete requests, double-click on the appropriate **Delete Request Name**. To run the **PrecedentChangeSet** delete request, for example, double-click **OCUSPM70.DRPCS** to open the Delete Request Editor.

   When the Delete Request Editor is displayed, confirm that the archive file name is correctly mapped with the delete request editor.

5. Click the **Run** icon on the Delete Request Editor to start the Delete process.

   The Delete Process Report shows the location of the archive file, the number of rows deleted, and other information. See Delete Process Report for further information on this report.

6. After you review the Delete Process Report, click **File** > **Close** to close the Delete Process Report, and then click **File** > **Close** to close the Delete Request Editor.

7. If you changed any of the request's previously-saved parameters, a pop-up window will appear.

   Click **Yes** to save your changes or click **No** to discard those changes.

Restoring Cúram data by using Optim Archive
After data is archived and purged from the production database, you can use the restore process to restore the archived data to your production database.

About this task

For more information about how to restore using Optim Designer, see the Optim product documentation at http://www.ibm.com/support/knowledgecenter/SSMLNW_11.3.0/com.ibm.nex.optimd.dg.doc/topics/opdg-c-restoring_data_w_optim_designer.html.

Use this procedure to restore archived Cúram data using Optim Archive.

Procedure

1. Double-click **OCUSPM70** under the Restore Request heading on the **Open a Restore Request** window. (**OCUSPM70** is the supplied default value; if you changed that value, click the name you specified.) The available restore requests are displayed in the Name column.

   Data can be restored to your production database or an archive database. Depending on the type of data you archive, the following restore requests are listed in the Name column:

Table 4.		
Request name	**Used for this template**	**To Restore data to ...**
OCUSPM70.RRASN_PRD/	AuthorisationLog	Production
OCUSPM70.RRATN_PRD/	AuthenticationLog	Production
OCUSPM70.RRCCDD_PRD/	CREOLECaseDeterminationData	Production
OCUSPM70.RRCE_PRD/	CaseEvent	Production

Table 4. (continued)		
Request name	**Used for this template**	**To Restore data to ...**
OCUSPM70.RRCPI_PRD/	ProcessInstance	Production
OCUSPM70.RRCPR_PRD/	CREOLEProgramRecommendation	Production
OCUSPM70.RRCTL_PRD/	CaseTransactionLog	Production
OCUSPM70.RRPCS_PRD/	PrecedentChangeSet	Production

2. Double-click the **PRD Restore Request Name** to restore to the Production database.

   For example, to run the PrecedentChangeSet restore request and restore the data to production, double-click **OCUSPM70.RRPCS_PRD** to open the Restore Request Editor. When the editor is displayed, right-click on the file name that is displayed in the **Archive File** column, and then click **Replace Archive File** > **File System** in the resulting menu.

3. When the Open file browser is displayed, click on the file you want to restore, then click **Open**.

4. When the Restore Request Editor is displayed again, right-click on the Request Name column, and **Add Insert Request** in the resulting pop-up window.

5. Select the appropriate request from the **Select an Insert Request** window.

6. Click the **Run** icon on the **Restore Request Editor** to begin the restore process.

   When the restore process starts, a **Restore Process Progress** window opens and displays information about the status of the restore request.

7. When the restore is complete, a **Restore Process Report** is displayed.

   The **Restore Process Report** contains general information and statistics about the restore. See 4.4 Restore Process Report for more information about this report.

8. After you review the **Restore Process Report**, click **File** > **Close** to close the **Restore Process Report**, then click **File** > **Close** to close the Restore Request Editor.

9. If you changed any previously saved parameters for the request, a pop-up window is displayed.

   Click **Yes** to save your changes or **No** to discard your changes.

Archiving by Cúram Template

IBM Cúram Archiving provides access definitions that define the data to be archived for a set of Cúram templates. These Cúram templates are available to archive and restore data against the Cúram database.

CREOLECaseDeterminationData

The CREOLECaseDeterminationData archiving solution archives the Cúram Express Rules (CER) rule object snapshot data that is stored when a new determination record is created as a result of the reassessment of a case.

The records in the CREOLECaseDeterminationData table that are archived are only those records that contain rule object snapshot data as opposed to those records that store data for the overall determination result that is used in the display of decision details information. For more information about the CREOLECaseDeterminationData table and how overflow data is stored, see https://www.ibm.com/support/knowledgecenter/SS8S5A_6.0.5/com.ibm.curam.content.doc/InsideEligibilityAndEntitlementUsingCER/c_INSEECER_Determinations1Creolecasedeterminationdata1.html.

CREOLECaseDeterminationData Archive Criteria

The CREOLEProgramRecommendation archiving solution accepts date as an input parameter.

The CREOLECaseDeterminationData records that are archived are the records that store the XML snapshot of the CER rule objects that are used in the calculation of results for determinations. Only those records that are related to determinations that do not have a status of **Current** that were created before

the date specified as an input parameter are archived. The records that are archived include the records that hold overflow data.

Note: In this module, records are not deleted from the CREOLECaseDeterminationData table. Instead, the data value is set to **Null** for the creoleSnapshotData column.

ProcessInstance
The ProcessInstance archiving solution archives workflow process instance data, including related tasks and alerts that are created by the workflow process.

ProcessInstance archive criteria

The ProcessInstance archiving solution accepts date as an input parameter.

ProcessInstance records that meet the following conditions are archived:

- The status is **Completed**.
- The **endDateTime** value is before the `date input` parameter.
- The **processType** is not **Synchronous**, or the process type is **Synchronous** and the process instance is a subflow of a parent process instance that has a status of **Completed**.

PrecedentChangeSet
The PrecedentChangeSet archiving solution archives Precedent Change Set data that are created by the Dependency Manager and then processed either in deferred or batch mode.

For more information about the Dependency Manager and Precedent Change Sets, see https://www.ibm.com/support/knowledgecenter/SS8S5A_6.0.5/com.ibm.curam.content.doc/CERReference/c_CERREF_Dependency1DependencyManager1.html.

PrecedentChangeSet archive criteria

The archiving solution accepts date as an input parameter.

PrecedentChangeSet records that meet the following conditions are archived.

- The status is **Completed** and the **completedDateTime** value is earlier than the `date input` parameter.
- The status is **Deferred to Batch** and the **submittedDateTime** value is earlier than the `date input` parameter.

CREOLEProgramRecommendation
The CREOLEProgramRecommendation archiving solution archives program recommendation data that is created when eligibility is determined for programs within an application or integrated case.

CREOLEProgramRecommendation archive criteria

The CREOLEProgramRecommendation archiving solution accepts date as an input parameter.

All **CreoleProgramRecommendation** records with a **dateTime** value earlier than the `date input` parameter, and that are not associated with a record of a simulated determination that is authorized or declined, are archived.

CaseTransactionLog
The CaseTransactionLog archiving solution archives Case Transaction Log data that is created when various events occur during the lifecycle of a case.

CaseTransactionLog Archive Criteria

The archiving solution accepts either **date** or a numeric value as an input parameter.

If **date** is used as the input parameter, then all CaseTransactionLog records (associated to any case) that have a **transactionDateTime** value earlier than the `date input` parameter are archived.

If a numeric value is used as the input parameter, then all CaseTransactionLog records (associated to any case), except for the most current **N** records, per case are archived.

The maximum number of transactions that are displayed on the Case home page is controlled by the 'curam.casetransactionlog.nooftransactions' application property. The value that is assigned to this application property setting should be considered when you determine what value to provide as an input parameter.

CaseEvent
The CaseEvent archiving solution archives Case Event data that is created when Case Decisions are generated as a result of determining eligibility and entitlement within a case but have been superseded by later decisions.

CaseEvent archive criteria

CaseEvent records (associated to any case) that meet these criteria are archived.

• The case event type is **Case Decision** where the related **Case Decision** record status is **Superseded**.

AuthenticationLog
The AuthenticationLog archiving solution archives Authentication Log data that is created when users attempt to log in to the application.

AuthenticationLog archive criteria

The archiving solution accepts **date** as an input parameter.

AuthenticationLog records (associated to any user) that meet these criteria are archived:

• The **timeEntered** value is earlier than the **date** input parameter.

AuthorisationLog
The AuthorisationLog archiving solution archives Authorisation Log data that is created when users attempt to invoke a function for which they are not authorized.

AuthorisationLog archive criteria

AuthorisationLog records (associated to any user) that meet the following condition are archived:

• The **timeEntered** value is earlier than the **date** input parameter.

Archive process report

The archive process generates an Archive Process Report that provides general information and statistics about the archive process. The report contains data on both the Archive and Delete processes in separate sections.

This is an example of an Archive report. An example of the Delete report is shown in Delete Process Report.

Report Details

The Archive Process Report is stored on the server where Optim is installed, as shown in the Output File Path on the Archive Process Log. The report includes the following information:

• The archive request's Request Name
• The Server Name where processing occurred, or (Local) for a local workstation
• The name and full file path of the generated Archive File
• The name of the generated Access Definition for the request
• The Client and Server User IDs that requested the process
• The date and Time the process Started and Finished, and the Elapsed Time to completion

- The Process Status for the archive process

Errors and warnings

If appropriate, a list of any errors or warnings that occurred during processing is also provided.

Process summary

The following statistics are provided for the archived data.

- The number of tables that were processed.
- The number of rows that were archived.
- The number of rows that have errors.
- The number of first pass table rows.

Object details

The number and type of database objects that were copied to the archive file is given, for example, Tables, PrimaryKeys, Relationships, and Indexes.

Row details

The following statistics are provided for each table.

- The number of rows that were archived from each table.
- The number of failed rows for each table.
- The table name of each table that was used in the archive process.

Delete process report

The Delete process generates a Delete Process Report that provides general information and statistics about the Delete process. The report contains data on both the Archive and Delete processes in separate sections.

This is an example of a Delete report. An example of the Archive report is shown in Archive Process Report.

Report details

The Delete Process Report provides details of the delete or purge processing.

- The Server Name where processing occurred, or (Local) for local workstation.
- The name of the Control File.
- The Client and Server User IDs that requested the process.
- The Date and Time the process Started and Finished.
- The Elapsed Time to completion of the process.
- The Process Status for the Delete Process.
- If appropriate, a list of any warnings or errors that occurred during processing is also provided.

Process summary

These statistics are provided for the data that was deleted.

- The number of Tables that were Processed.
- The number of Rows that were Deleted.
- The number of Rows that were Not Found.
- The number of Rows that have Errors.

- The number of database connections (DB Connections).

Row details

These statistics are provided for each table.

- The number of rows that were Deleted from each table
- The number of rows that were Not Found in each table
- The number of rows that Failed in each table
- The Table Name of each table that was used in the process.

Restore process report

The restore process generates a restore process report that provides general information and statistics about the restore.

This report is an example of a Restore report.

Restore process report details

The restore process report is stored on the server where the Optim Archive solution is installed. The restore process report contains the following information

- The Restore Request Name, which is Untitled if you did not save the request
- The Client User ID of the user that requested the process
- The Date and Time the process Started and Finished
- The Elapsed Time to complete the process
- The Process Status for the restore process
- A list of any warnings or errors that occurred during processing, if appropriate.

Restore process summary

The summary of the number of archive files that were processed and the number of files that were successfully restored. The Status, number of Errors and Warnings, and the name of each Archive File that is processed in the restore request are displayed. The following are the possible status messages.

Restore Complete
   The restore process for the archive file (Insert or Load) that was completed without errors.
Restore Failed
   The restore process for the archive file (Insert or Load) encountered an error.
Row Selection Complete
   The Extract File subset that was completed successfully, but the restore process was not attempted. Prior restore errors might cause this condition.
Row Selection Failed
   The Extract File subset was not created due to errors that were encountered.
Aborted
   The restore process (Insert/Load) was canceled by the user.

Insert Process

A summary of the insert process is given, as shown here.

- The Request Name and Server Name
- The name of the Source File
- The name of the generated Control File
- The name of the Table Map (or Local)

- The Client and Server User IDs that are requesting the process
- The Date and Time that the process Started and Finished
- The Elapsed Time to completion of the process
- Whether the Control File was Retained or Deleted
- The Process Status for the insert process

Process statistics summary

The following statistics are provided for the data restored

- The total number of Tables that were Processed
- The total number of Rows that were Inserted
- The total number of Rows that were Updated
- The total number of Rows with Errors
- The total number of Rows that were Skipped (A row might be skipped because the **On Error Option** was Selected for an archive action).

Row details

This information is provided for each table.

- The number of rows that were Inserted
- The number of rows that were Updated
- The number of Failed rows
- The number of rows that were Skipped
- The Table Name of each table that was used in the process

Errors

If any errors occur during processing, an error list is provided. Review the list to determine the reason for the error.

Status code

This table shows and defines the status codes that are returned by the restore process.

Table 5.	
Code	**Description**
0	Successful: Restore Completed
4	Successful: Archive Completed (with informational messages)
8	Archive Completed with Warnings
11	Unsuccessful: Error Creating Override Text File
12	Unsuccessful: Error Could Not Load PST Information
16	Unsuccessful: Syntax Error on pr0cmnd Command Line Call
24	Unsuccessful: Could Not Open the File Specified in the Override Output Parameter
99	Unsuccessful: Error Calling Custom Business Function

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