

Archive and Purge explained

Mike Shaw — 5th October 2022

Sage



Contents

Review of Purge and Archive

Worked example: Archiving Supplier BP invoices

Further reading

Review of Purge and Archive

Review of Purge and Archive

Review and discuss the PDF attached to the blog article [Time to tidy up?](#)

Worked example: Archiving Supplier BP invoices

Worked example: Archiving Supplier BP invoices

Demonstration

- Identify the archive process to run
- Run the simulation and understand the requirements in order to archive the transactions
- Test and check the results

Worked example: Archiving Supplier BP invoices

Points of note:

- Before archiving PINVOICE, you need to archive financial transactions (GACCENTRY)
- GACCENTRY requirements:
 - Fiscal Year must be closed
 - Journal status must be final (GACCENTRY.STA=2)
 - Journal does not have “Financials” as source module (GACCENTRY.ORIMOD <>2)
 - Must be matched (GACCENTRYD.MTC value between A and ZZZZ)

Purging archived data

Whilst it is useful to archive the data, you may wish to purge the archived records when they are no longer needed for reporting or auditing purposes (e.g. after 7 years)

- Setup purging on the archive folder
- The archive records date is reset to the date it is transferred to the archive folder

Further reading

Further reading

Online help

- [Archive/purge](#)

Knowledgebase articles

- [Can the ITCMAT table be purged?](#)
- [Can I truncate the AREPORTM Temporary table.](#)
- [Is there an option to set the archive folder on a different SQL server?](#)
- [HTG How to purge stock transaction data in Sage X3](#)

Summary

Review of Purge and Archive

Worked example: Archiving Supplier BP invoices

Further reading

Thank you!

