

Archiving in Case Management



HELP.CACASE

Effective from Release 700



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Icons in Body Text

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Additional icons are used in SAP Library documentation to help you identify different types of information at a glance. For more information, see *Help on Help → General Information Classes and Information Classes for Business Information Warehouse* on the first page of any version of *SAP Library*.

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, graphic titles, and table titles.
EXAMPLE TEXT	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example text	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE TEXT	Keys on the keyboard, for example, F2 or ENTER.



Archiving in Case Management

Purpose

You can use archiving to store cases that are no longer required in archives and then physically remove them from the database. You can select the components in the case that you want to archive here. You can archive the following components:

- Case records
- Notes
- Protocol
- Process route



Note: Archiving the case record does not include archiving of the documents it contains.

The case record is moved to a [Content Server \[Extern\]](#) during a relocation program run. Notes, the protocol and process route are archived using the Archive Development Kit (ADK). However, the connection between the case and the case record is also retained following archiving.

The SAP archiving environment is controlled completely by the status and is connected to the [SAP Archive Information System \[Extern\]](#). The archiving object for Case Management is called SCMG.



Note: The following restrictions apply to archiving in Case Management:

- Archived cases cannot be reloaded.
- You can only delete archived cases.
- Archived cases can only be displayed in a technical view using the Archive Information System.
- Document contents are not archived, the system only archives the URL.
- Documents and conditions are not archived or deleted.

Prerequisites

- You have [activated the archiving functions \[Seite 9\]](#).
- You have made the following settings in the SAP Implementation Guide under *SAP NetWeaver → Application Server → Basis Services → Case Management*:
 - IMG activity *Set Archiving Times*

You define the residence time in days. This enables you to stipulate that all cases that have reached or exceeded the residence time can be archived. This information is evaluated when case records are moved and when cases are archived. You define the [Content Repository \[Extern\]](#) (category) to which case records are to be moved.
 - IMG activity *Register Classes for Archiving Own Subcomponents*

You only need to perform this IMG activity if you have implemented your own case components and would like to archive them. SAP provides archiving classes for the standard case components.

Process Flow

Archiving and deletion of Case Management data takes place in the following asynchronous steps:

Relocation Phase: Moving Document Content from the Database

During the relocation phase, you move the physical documents. This is strictly not part of the actual archiving process.

1. Call transaction SE38 and run program CASE_RELOCATE_PROGRAM.

An entry screen appears.

2. Enter the area in which case records are to be archived. You can also restrict this to a specific case ID, or range of case IDs or use the RMS ID to restrict this to specific element types and case types.

You have defined the case records that are actually to be moved to the archive and the content repository to which they are to be moved in the IMG activity *Set Archiving Times*.

You can use process control to define whether the program is run in the test mode or production mode. In test mode, the content is not moved, though you can see how many documents would be archived according to the specified criteria.

3. Run the program. The program log is displayed. This contains a list of all case records moved.



You can also configure an element type in such a way that the document content will be stored on a content server from the outset. By doing this, you no longer need to move the document content during the relocation phase.

Preliminary Phase: Flag Cases for Archiving

You use the preprocessing archiving run to determine all objects that can be archived according to the Customizing settings you have made. The objects found are assigned the status *Archivable*, *Locked* and *To be Deleted*.



SAP recommends adding a customer-specific usage check as a program variant to the preprocessing archiving run for Case Management (BA01 ARC_SCMG_CHECK). This prevents objects from being archived and deleted from the database in error.

Perform the preprocessing phase as follows:

1. Choose the *Preprocessing* action in the SARA transaction with the archiving object SCMG.
2. Enter the *Start Date* and *Spool Parameters* and define the required data.
3. Choose a *Variant*.
4. The initial screen of a program is displayed.

The input parameters correspond to those for the program CASE_PRE_PROGRAM. Enter the area in which case records are to be archived. You can also restrict this to a specific case ID, or range of case IDs or use the RMS ID to restrict this to specific element types and case types. You have defined the case records that are actually to be moved to the archive and the content repository in which they are to be written in the IMG activity *Set Archiving Times*.

You can use process control to define whether the program is run in the test mode or production mode. You can determine the number of cases that would be flagged for archiving using the criteria specified in the test mode.

5. Run the program.

You see the message *System has created new preprocessing job*. All cases selected here are assigned the status *Archivable*. The program log is displayed. This contains all cases flagged.

Archiving Phase Write: Write Data to Archive

The write program writes data from all objects that are archivable according to their status in the archive file that has been defined for the respective archiving object. The system sets the status of the archiving run to *Incomplete* in Archive Administration in the ADK (transaction SARA).

Execute the write program as follows:

1. Choose the *Write* action in the SARA transaction with the archiving object SCMG.
2. Choose *Start Date* and *Spool Parameters* and enter the required data.
3. Choose a *Variant*.
4. The initial screen of a program is displayed.

The input parameters correspond to those for the program CASE_WRITE_PROGRAM. Enter the area in which case records are to be archived. You can also restrict this to a specific case ID, or range of case IDs or use the RMS ID to restrict this to specific element types and case types. You have defined the case records that are actually moved to the archive in advance.

You can use process control to define whether the program is run in the test mode or production mode. Data is not written to the archive in the test mode. You can however determine how many cases would be written using the criteria specified.

5. Run the program. You now see the message *System has created new archiving job*. Data about the cases with the status *Archivable* is written in an archive file. The system does not modify the status of the case.

Archiving Phase Delete: Check Archived Data

The deletion program opens the archive files that were previously created by the write program and reads the data again. These files are flagged by the system to prevent archive files being read several times. The system sets the status of the archiving run to *Complete* in Archive Administration in the ADK (transaction SARA).

Execute the deletion program as follows:

1. Choose the *Delete* action in the SARA transaction with the archiving object SCMG.
2. Choose *Start Date* and *Spool Parameters* and enter the required data.
3. Make an *Archive Selection*
4. You can use process control to define whether the program is run in the test mode or production mode. The system does not delete data from the database in the test mode. You can however determine how many cases would be deleted using the criteria specified.
5. Run the program.

You see the message *New deletion jobs scheduled*. The system now compares the data in the local archive with data in the local database and sets the status *Archived* for objects that are found in both the archive and the database. Cases are deleted from the database.

Display Archived Objects in Product Maintenance

1. Choose the *Read* action in the SARA transaction with the archiving object SCMG.
2. Decide whether you want to read the archived cases in the *Background* or in *Dialog*.
3. The program CASE_READ_PROGRAM is started.

The dialog box *Archive Management: Select Files for Read Program* appears. This contains a list of all archiving sessions. You can identify archiving sessions using the archiving date and the note. You can flag productive archiving runs. Archiving sessions that have been run in test mode are flagged as *Failed*.

4. Select an archiving session and choose *Continue*.

You now see a list containing all archived cases in the chosen archiving session. All attributes for the cases are also displayed. You can display the case record by double-clicking.

See also:

[Introduction to Data Archiving \(CA-ARC\) \[Extern\]](#)

[SAP Content Server \[Extern\]](#)



Technical Details About Archiving

Overview of the Archiving Status

Archiving Status

Archiving Steps	Resulting Product Status	Status of Archiving Run in Archiving Administration (ADK)	Physical Location of Data
Preprocessing (can be scheduled periodically)	<i>Archivable Locked To be deleted</i>		Database
Write (can be scheduled periodically)	<i>Archivable Locked To be deleted</i>	<i>Incomplete</i>	Archive file and database
Delete (can be scheduled manually)	<i>Archived Locked Deleted</i>	<i>Complete</i>	Archive file and database

Programs and Functions

The following programs and functions are used for archiving in Case Management:

Archiving Programs

Archiving Function	Program	User Interface / Use	Execution Type
Archive administration preprocessing	CASE_PRE_PROGRAM	Transaction SARA	Job
Archive administration	CASE_WRITE_PROGRAM	Transaction SARA	Job

write			
Archive administration delete	CASE_DELETE_PROGRAM	Transaction SARA	Job
Display cases from the archive	CASE_READ_PROGRAM	Transaction SARA	Job
Customer-specific usage checks	Implementations of the Business Add-In ARC_SCMG_CHECK	BAAd method CHECK	Implicit usage: Point of access in preprocessing program CASE_PRE_PROGRAM

Business Add-Ins for Extending Archiving

You can extend archiving in Case Management using the following Business-Add-Ins:

Business Add-Ins

Business Add-In	Methods / Use
ARC_SCMG_CHECK	You can use the CHECK method to define your own usage checks.
ARC_SCMG_DELETE	You can use the DELETE method to delete additional data that is not immediately associated with the case.
ARC_SCMG_WRITE	You can use the WRITE method to write additional data to the archive that is not immediately associated with the case.

These BAAdIs are accessed using transaction SE18 and you implement them using transaction SE19.

Archiving Object Structures for Case Management

The following structures are available for defining the archiving object:

Structures

Archiving Object [Extern] Defines the Archiving Framework	SCMG
Archive Information Structure [Extern] Defines the total number of fields that can be that can be used in field catalogs and therefore indexed in product archives. For more information, see Archive Information System [Extern] .	SAP_CM_ARC SAP_CM_ATTR_QUE
Field catalog Structure of an archive index that is maintained in the SAP Archiving Information System. A field catalog always belongs to an archiving information structure. An archiving information structure always belongs to an archiving object.	SAP_CM_ARC SAP_CM_ATTR

Tables for the Archiving Object SCMG

The data archived and deleted in the archiving object SCMG comes from the data tables listed below. All of the table structures that are to be archived are defined when the archiving write program is run:

Tables

Table	Description
SCMG_T_CASE	Entity table for the case
SCMG_T_CASE_ATTR	Case attributes table
SRMWFPATH	Workflow process route
SRMWFPATHAGT	Additional individuals involved in the process route
SRMWFPATHHT	Text table for the process route header
SRMWFPATHGROUP	Assignment table of process route templates to groups
SRMWFPATHFIELDS	Customer-specific additional fields in process route
SRMWFPATHPS	Process route item for workflow
SRMWFPATHREL	Predecessor-successor relations for process route items
THEAD	SAPscript texts: Header
TLINE	SAPscript texts: Lines



Activating Archiving Functions

Use

To use archiving in Case Management, you must first activate the archiving function. Perform the following steps:

Modify the Archive File Name and Path (Mandatory)

Before performing archiving, you must adjust the definition of the archive file so that it is suitable for your system landscape. To adjust the definition of the archive file SCMG, proceed as follows:

1. Select the archiving object SCMG in archive administration (transaction SARA).
2. Choose *Customizing*.
3. On the *Data Archiving Customizing* screen, choose *Basis Customizing* → *Client-Specific File Names*.
4. Enter the necessary data.

For more information, see [Defining Logical Path and File Names \[Extern\]](#).



Archive files for the archiving object SCMG are created with the logical file name ARCHIVE_DATA_FILE under the logical path ARCHIVE_GLOBAL_PATH.

Modify Runtime Settings for Archiving Object SCMG (Mandatory)

Before performing archiving, you should check the runtime settings for the archiving object SCMG and modify them so they are suitable for your system. You should check specifically that the settings for the logical file name are correct. This enables you to define where the data is archived.

To check the technical data for the archiving object SCMG, proceed as follows:

1. Select the archiving object SCMG in archive administration (transaction SARA).
2. Choose *Customizing*.
3. On the *Data Archiving Customizing* screen, choose *Cross-Archiving Object Customizing* → *Technical Settings*.
4. Check the following system settings:
 - *Logical file name*
 - *Size of the archive file*
 - *Settings for the delete program*
 - *File storage to storage system*
5. Save your settings.

Create Program Variant for Program CASE_PRE_PROGRAM (Optional)

SAP recommends creating a variant for the program CASE_PRE_PROGRAM that you can use to restrict archiving to specific objects. You can select this variant as a variant for checking objects.

To create a program variant, proceed as follows:

1. Select the archiving object SCMG in archive administration (transaction SARA).
2. Choose *Customizing*.
3. On the *Data Archiving Customizing* screen, choose *Cross-Archiving Object Customizing* → *Check and Delete*.
4. On the *Customizing for Cross-Archiving-Object Programs* screen, choose *Create Variant* in the *Check* screen area.

Enter a variant name and choose *Create*. Define the additional data required. Choose *Attributes* to create attributes for this variant.
5. To define a variant as an active variant for archiving, select this variant in the *Active Variant* field on the *Customizing for Cross-Archiving-Object Programs* screen.

Save your settings.

Activate Archive Information Structure SAP_CM_ARC (Optional)

The archive information structure SAP_CM_ARC is supplied in an inactive format with the field catalog SAP_CM_ARC. The information structure must be activated before the archive is read for the first time. The information structure (if it is active) can be updated automatically during the archiving deletion run, and is required to display archived products using the Archive Explorer in the SAP Archive Information System. You can also create the index specifically for the SCMG archive once archiving is complete.

To activate the archiving information structure, proceed as follows:

1. In *Archive Administration* (transaction SARA), choose *Goto → Information System*.
2. Choose *Customizing*.
3. In the *Archive Infostructure* field, enter SAP_CM_ARC.
4. Now choose *Archive Infostructure → Activate*.



Monitor Archiving

Use

The following describes the functions available for monitoring archiving in Case Management.

Features

Usage Check

During the usage check, the system makes a note in the application log of the objects that could not be archived. Use transaction SLG1 to evaluate the application log and enter the sub-object SCMG. You should also check the date and time of the usage check.

Archiving Job

To display the status of jobs that were generated using transaction SARA to write and delete the archive, call transaction SARA and choose *Goto → Job Overview*.

Archive File

To display the status of archive files, call transaction SARA and choose *Goto → Statistics*.

Archive Information System

You use the Archive Information System to display archive files in Case Management. The following prerequisites must be met to display data in the Archive Information System:

- Check whether the archive information structure SAP_CM_ARC has already been activated:
 - a. Choose *Archive Information System* (transaction SARI).
 - b. Choose *Customizing*.
 - c. In the *Archive Infostructure* field, enter SAP_CM_ARC.
 - d. Choose *Activate*.
 - e. Check the system message.
- Check whether index structures have been created for archive files:
 - a. Return to the initial screen of the Archive Information System (transaction SARI).
 - b. Choose *Status*.
 - c. In the *Archiving Object* field, enter SCMG.
 - d. Choose *Status per Archive*.
 - e. If the fill status is incomplete, select the archive required.
 - f. Choose *Create Structures*.