

# OSAS Report Archiving

## Overview

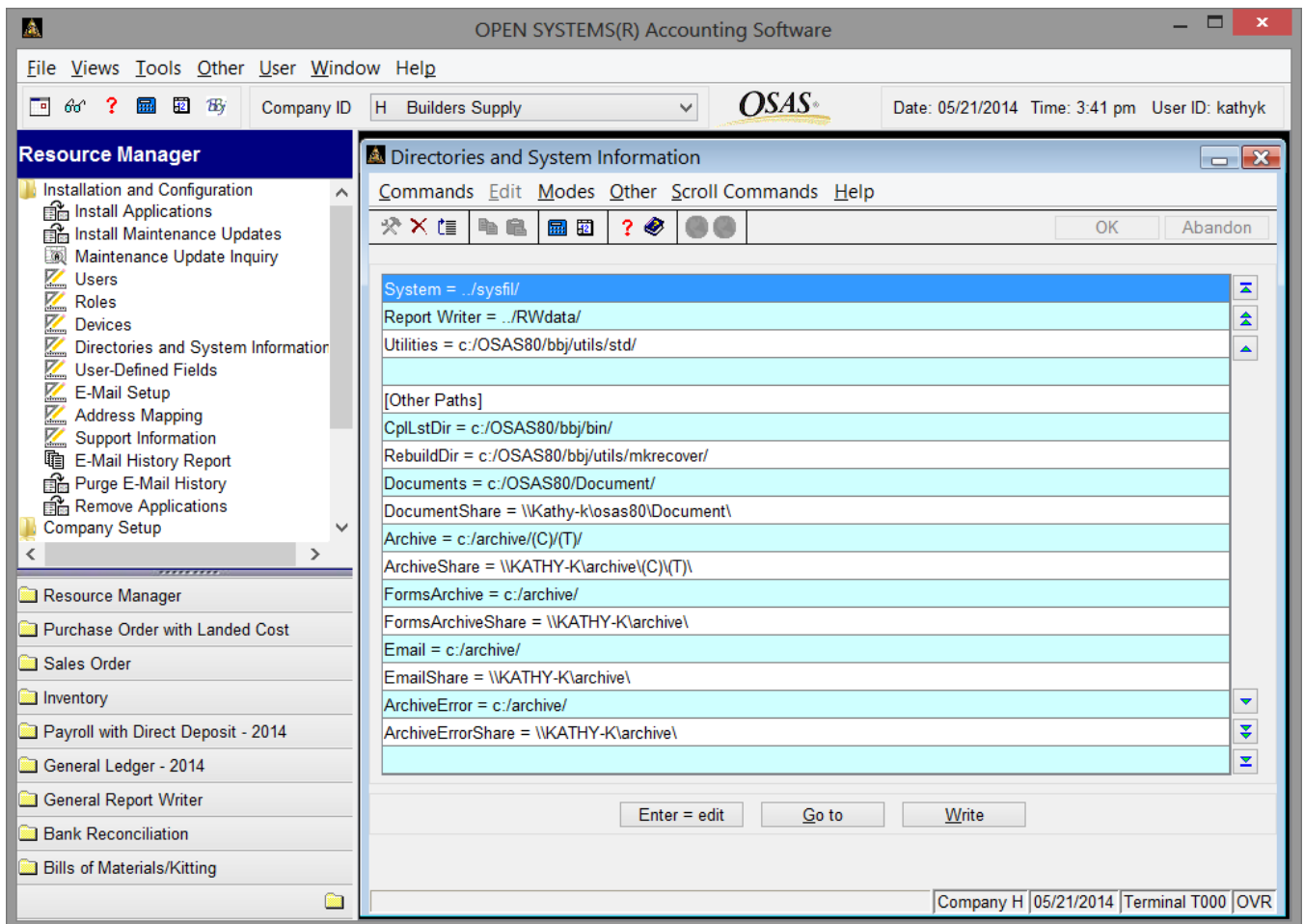
Starting with OSAS version 7.6, you can automatically archive reports and forms, reducing steps and increasing the security of your audit systems. You can also set different archive locations for each report, and set automatic naming criteria to make future retrieval and sorting very simple. With OSAS version 8 you can also archive exported reports.

## Setup

### Directories and System Information

Define the **Archive directory paths** in the **Directories (7.6)** or **Directories and System Information (8)** function from the **Installation & Configuration** menu in the **Resource Manager** application.

**NOTE:** The “share” path names are client perspective references of the same directory structure as the associated archive path (i. e. Archive vs. ArchiveShare) and will be used by Print Manager.



**DIRECTORIES**

<b>Archive</b>	This directory is the <b>default</b> directory for report archiving for the system.
<b>ArchiveShare</b>	The <b>Print Manager</b> will use this directory path to access archived reports.
<b>FormsArchive</b>	This directory is for <b>PDF forms</b> archiving, it can be the same as the Archive directory if desired.
<b>FormsArchiveShare</b>	The <b>Print Manager</b> will use this directory path to access archived PDF forms.
<b>Email</b>	This directory is for PDF forms that will be E-mailed, it can be the same as other archive directories defined if desired. In previous versions this path was hardcoded to ../document/forms directory.
<b>EMailShare</b>	The <b>Print Manager</b> will use this directory path to access archived email forms.
<b>ArchiveError</b>	When archiving, if there is a problem in finding the archive directory for a report or user this directory will be used.
<b>ArchiveErrorShare</b>	The <b>Print Manager</b> will use this directory path to access archived forms or reports that originally had a problem getting created in their defined archive directory..

**Directory Shortcut Options**

Report Archiving will support several shortcuts that will be evaluated at print time so custom directories will be created and used. These shortcuts can be used in combinations to create a more specific directory structure if desired. Be sure to use the same shortcuts for the share paths as both the file path and the file share path are written to a record. Differences in those paths will prevent the user from reading these files through OSAS.

<b>Parameter</b>	<b>Description</b>
<b>(C)</b>	Current company ID, with spaces stripped off.
<b>(A)</b>	Current application ID (AR, AP)
<b>(U)</b>	Current User ID
<b>(T)</b>	Report Title (Aged Trial Balance, GL Journal)
<b>(TYPE)</b>	Form Type (Invoice, DD Voucher)
<b>(P)</b>	Program generating the report or form (Inventory valuation Report=inprva)
<b>(ID)</b>	The Current Master ID in forms ("ACE001")
<b>(YMD)</b>	Current system date, in YYYYMMDD format (20140919)
<b>(Y)</b>	Current year to 4 digits
<b>(M)</b>	Current month, in numeric/text (09_september)
<b>(M2)</b>	Current month, in text/day (month09_sep)
<b>(D)</b>	Current day (Tuesday)

**EXAMPLE:**

Using **"C:/OSAS80/override/(T)/(D)"** as an override archive directory for a specific report. When that report is printed the system will create a folder with the report title (i.e. open\_invoice\_report) and define a nested folder inside with the workstation day (i. e. tuesday) which will contain the actual report file. The actual path to the file may then look like the following:

**C:/OSAS80/override/open\_invoice\_report/Tuesday/A00000009Z.PDF**

Click the **OK** button to confirm your changes or the **Abandon** button to start over for this report and then **W to Write** the changes.

## Company Setup

### Options and Interfaces– Resource Manager

- Do you want the system to assign sequential archive names?
- Do you want to keep Print Manager report history?
- Display Print Manager control lists for: User ID, Terminal ID, All
- Archive exported Reports?

### Options and Interfaces– Other Applications

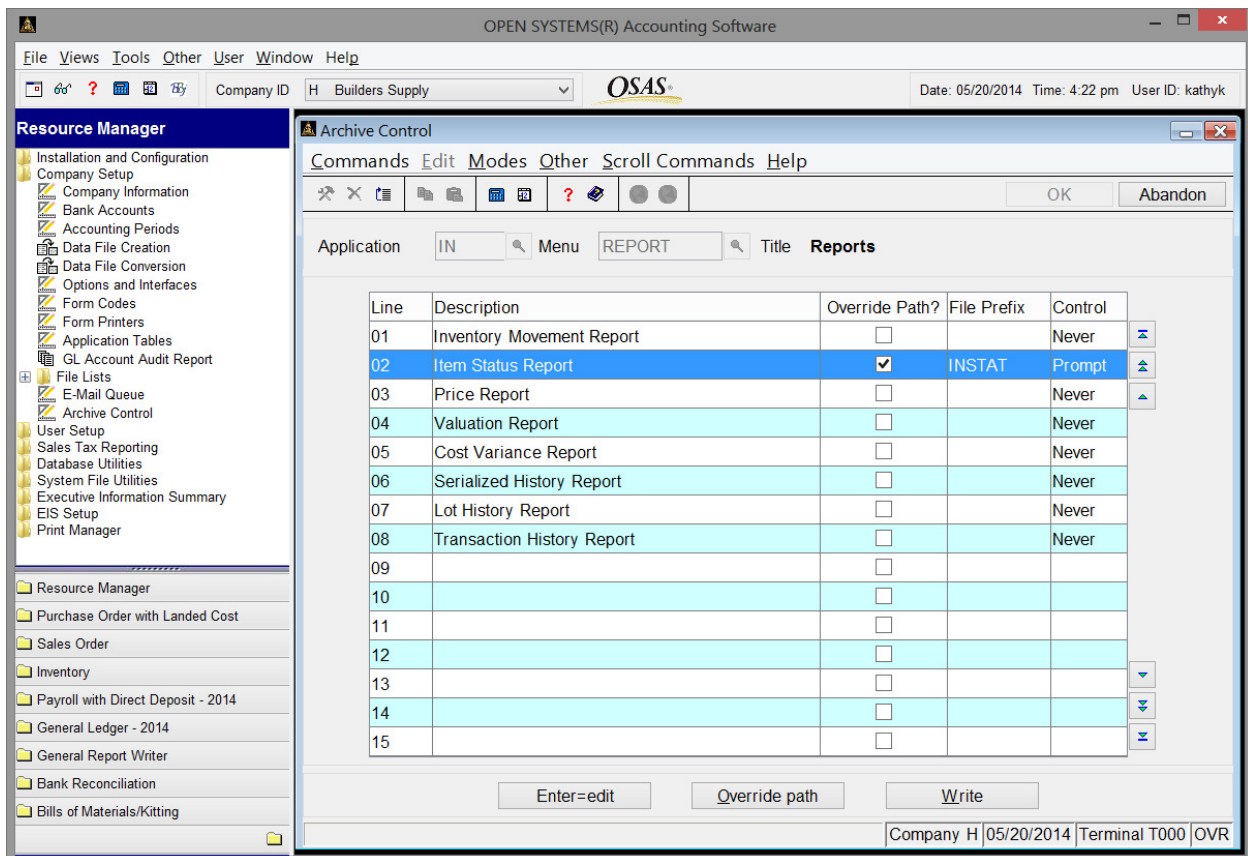
- Save Archived documents (Ex. Invoices, Checks, Vouchers) Links to Print Manager?

## Archive Control Setup

### Prefixes and Archive control

Use the **Archive Control Function** from the **Company Setup Menu** in **Resource Manager** to set **Archive Control**, **File Prefixes** and **Override Paths** for specific reports if desired.

Enter an **Application ID** and **Menu**.



Select the report, in this case the **Item Status Report**, and then press **Enter** or click on the **Edit** button to add a **File Prefix** and change the **Control** for archive status. In OSAS 7.6, you will also be able to select a Type such as PDF.

## OSAS Report Archiving

Field	Description
<b>File Prefix</b>	Enter a <b>File Prefix</b> (max 6 characters) to identify the report. The file name will begin with these characters.
<b>Control</b>	By default the control is set as <b>"Never"</b> .  Select <b>"Prompt"</b> to decide at the time of printing if you wish to archive the report.  Select <b>"Always"</b> if you wish to always archive the report. Your report will archive automatically when you select <b>Print</b> or <b>Preview</b> .
<b>Type - OSAS 7.6 only</b>	Select the <b>Type</b> of file you wish to create. Using <b>BBj</b> will allow for both a <b>PDF</b> , or a <b>Text</b> file, if this is a <b>Vpro5/pro5</b> installation <b>Text</b> will be the only option.

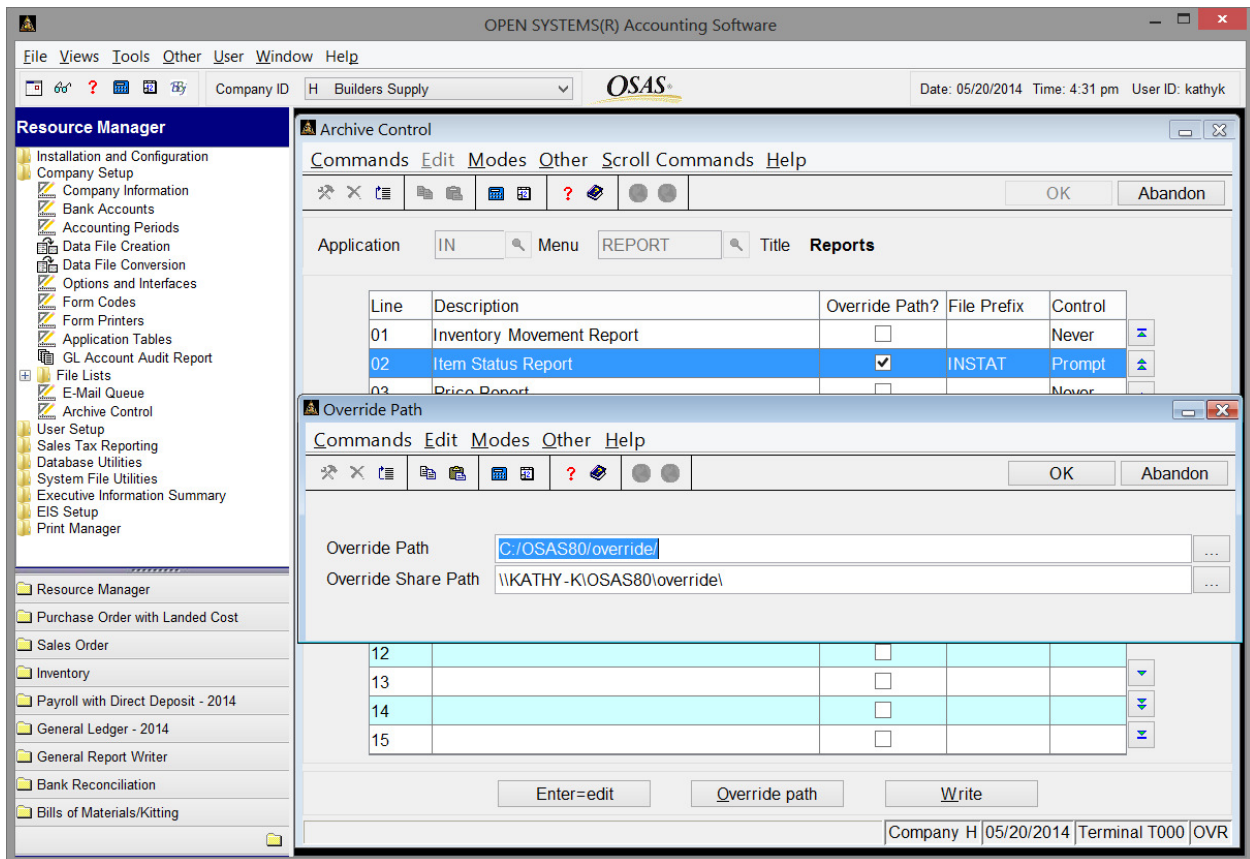
Click the **OK** button to confirm your changes or the **Abandon** button to start over for this report and then **W** to **Write** the changes.

### Overriding Archive Default Directories

To setup an **Override Path**, or a specific directory structure, for a specific report, highlight the report and press **"O"** or click the **"Override Path"** button. Enter the **Override Path** for this report and the **Override Share Path** which will be the path that the Print Manager uses to access the report archive.

**NOTE: The Override Path in Archive Control will supersede the Archive path in Directories if used and the User Archive path will supersede the Archive Control Override path if used.**

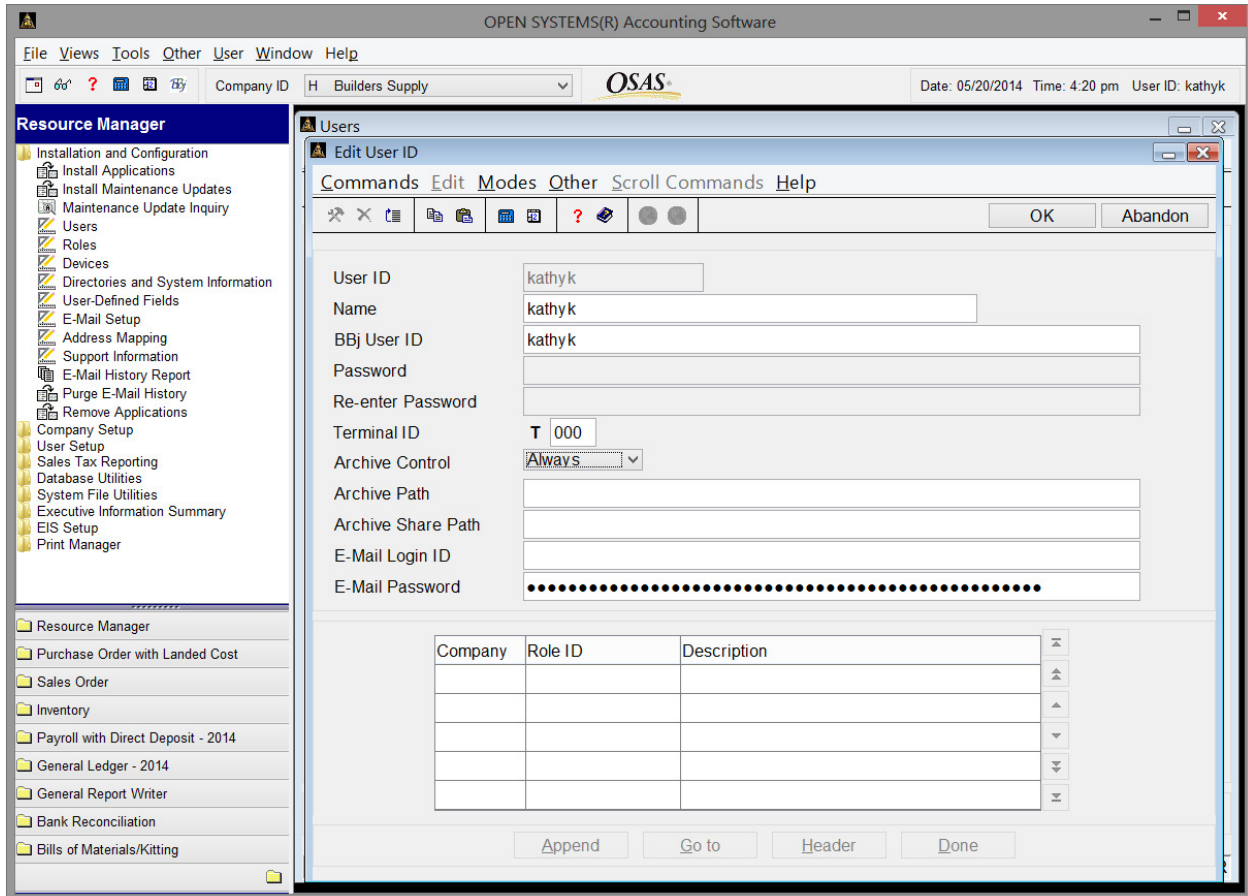
Click the **OK** button to confirm your changes or the **Abandon** button to start over for this report and then **W** to **Write** the changes.



## Installation and Configuration Users

Select **Users** from the **Installation & Configuration** Menu in **Resource Manager** and press Enter to **Edit**. You can then set **Archive Control** to either “Prompt” or “Always” for the user and add an **Archive Path** and **Archive Share Path** for the user if desired.

**NOTE: The Override Path in Archive Control will supersede the Archive path in Directories if used and the User Archive path will supersede the Archive Control Override path if used.**



## Archive Control vs User Archive Control

The following grid displays the results of **Archive Control Settings** in combination with **User Archive Settings**

### Archive Control Setting

### User setting

	Always	Prompt	Never
Always	Always	Always	Always
Prompt	Always	Prompt	Never
Never	Always	Never	Never

## Backup

Make sure **all Archive Directories** are being backed up regularly.