



Data Management – When to Purge, Archive or consolidate data DBA Classic & Evo-ERP

General – Before any Purge or Consolidation is performed, make a backup copy of the complete program folder and all subfolders (typically DBAMFG or EVOERP folder with subfolders) and store on a permanent media such as DVD in a safe location. This way, if there is ever a need to access the purged data, you will have a backup of the data and the appropriate version of the programs to access the data. This is not required when archiving because archiving is not deleting any data; only moving it to a different file. All the Archive programs have an option to restore archived items so in addition to the reports that are available to look at the archived data, the archived items could be restored to the active file if need be. After purging, archiving or consolidating, reindex the affected files to reclaim hard disk space by using UT-C or the Pervasive Rebuild Utility. The specific file names affected are listed in each section below. The extension will be B or BXX where XX is your company designation.

Warning – If you have Pervasive 2000 or PSQL 8, if any single file reaches a size larger than 2 GB, DBA and Evo will no longer function in programs that use that file. You should periodically use Explorer and look at your company data directory sorted by file size to make sure you are not approaching the 2 GB limit. If you are, you either need to purge the data in the large file or upgrade to the newer version of Pervasive (available from IS Tech Support). If you have PSQL 9 or 10 and have files approaching 2 GB, use the [Pervasive Control Center at the server – Configure Local Engine – Performance Tuning](#) and remove the checkmark from the setting “Limit Segment size to 2 GB” which will allow files to grow beyond 2 GB. You need to stop and restart the Pervasive service when changing this setting so all users need to be out of the system.

Sales Orders – Closed Sales Orders can be archived or purged using SM-J-J. Purging or archiving closed sales orders clears the “empty skeleton” of the closed order in the open order file but does not touch Receivables or shipment history. It will speed up the SO-O reports (all of them except SO-O-H) Stock Status rebuild, IN-A, and the generation of MRP. If the orders are purged, then they are deleted and can not be recovered. If they are archived then they are transferred to a separate set of files and can be accessed using SO-O-J & SO-O-K when prompted whether to use Active or Archived files. After purging or archiving closed sales orders, reindex BKARINV, BKARINVL and BKARDESC files.

Invoices – Archiving old invoices (SM-J-K) can speed up the SA reports on active files but will remove the “Shipment” data available in IN-A and AR-A. SA-M and SA-N have options to use Active or Archived data. Purging is generally not necessary until or unless the file size approaches 2 Gigabytes for a single file (approximately 2 million invoice line items in BKARHIVL) and you have a Pervasive version older than PSQL 9. After archiving or purging invoices, reindex BKARHINV, BKARHIVL, BKARHDSC, BKSOHSER and BKSOHLOT

Work Orders – The Work Order files should be archived regularly (SM-J-B), perhaps monthly or quarterly. Since all the Job Cost reports can report on either Active or Archived Work Order files, the only reason to keep closed Work Orders in the active work order file is to be able to run one report that includes both open and closed Work Orders, as in the case of a long term job that encompasses multiple Work Orders, and/or to have access to the work order information using the Work Order button in IN-A. Archiving Work Orders will speed up the Stock Status rebuild, IN-A and the generation of MRP. Purging Work Orders (SM-J-E) is generally not necessary until or unless the files grow so large that the JC reports on the Archived Work Orders become unmanageably slow and/or file size approaches 2 Gigabytes for a single file on a Pervasive version older than PSQL 9. Files to reindex after archiving or purging Active Work Orders are WORKORD, WOBOM, WOROUT, WOMAT, WOLABOR, WORECV, OUTPROC, WOEXCHG, WODATE. Files to reindex after purging Archived Work Orders are WORKHORD, WOHBOM, WOHROUT, WOHMAT, WOHLABOR, WOHRECV, OUTHPROC, WOEXCHG, WOHDATE

Purchase Orders – The Closed Purchase Orders can be archived (SM-J-R) as needed to speed up the PO-I-F report. Once they are archived, they will no longer be available on the Received PO button in IN-A. Files to reindex after archiving closed Purchase Orders are BKAPHPO, BKAPHPOL

Inventory Transactions – Transaction detail can be consolidated using SM-J-D which will replace the transaction detail with one net transaction per month per part per transaction type. Consolidation can not be reversed. Make a backup. Lot or Serial controlled transactions will not be consolidated. File to reindex after consolidation is INVTXN.

GL Transactions – GL Transaction detail can be consolidated using AM-I for all or ranges of accounts and all or selected Journal types. Consolidating will replace the transaction detail with a net debit and net credit transaction per month per account per journal type for the dates, account ranges and journal types specified. Consolidation can not be reversed. Make a backup. File to reindex after consolidation is BKGLTRAN

Accounts Payable (date) – AP detail can be purged or archived by date using AM-J which will archive voucher, invoice and payment detail for invoices fully paid as of the date specified. The AP-R report has an option to access active or archived payables data. Files to reindex after AM-J are BKAPINVT, BKAPINVL, BKAPCHKH.

Accounts Payable (Vendor) – AP and purchasing detail can be purged or archived by vendor using AM-O for vendors with no activity since a specified date. This program can be run by a range of Vendor Code and/or Vendor Class. All records for the specified vendor(s) including invoices, vouchers, payments, purchase orders and the vendor master record will be

purged or archived. Files to reindex after AM-O are BKAPINVT, BKAPINVL, BKAPCHKH, BKAPHPO, BKAPHPOL, BKAPVEND.

Accounts Receivable (date) – AR detail can be purged or archived by date using AM-K which will archive voucher, invoice and payment detail for invoices fully paid as of the date specified. The AR-R report has an option to access active or archived receivables data. Files to reindex after AM-K are BKARINVT, BKARINVV, BKARCHKF.

Accounts Receivable (Customer) – AR and sales/shipment detail can be purged or archived by customer using AM-P for customers with no activity since a specified date. This program can be run by a range of Customer Code and/or Customer Class. All records for the specified customer(s) including invoices, vouchers, payments, sales orders and the customer master record will be purged or archived. Files to reindex after AM-P are BKARINVT, BKARINVV, BKARCHKF, BKARINV, BKARINVL, BKARHINV, BKARHIVL.

Service & Repair/RMA - Closed Service/Repair & RMA Orders can be archived or purged using SM-J-P. Purging or archiving closed orders clears the “empty skeleton” of the closed order in the open order file but does not touch Receivables or shipment history. It will speed up the SO-O reports (all of them except SO-O-H) Stock Status rebuild, IN-A. If the orders are purged, then they are deleted and can not be recovered. If they are archived then they are transferred to a separate set of files and can be accessed using SO-O-J & SO-O-K when prompted whether to use Active or Archived files. After running SM-J-P, reindex ISSRINV, ISSRINVL, ISSRINFO, ISSRMMS, ISRMAI and ISSRDESC files.

Sales Quotes - Closed Sales Quotes can be archived or purged using SM-J-T. If the quotes are purged, then they are deleted and can not be recovered. If they are archived then they are transferred to a separate set of files and can be restored if there is a future need to access the data. After running SM-J-T, reindex BKESTQT, BKESTQTL.

Inventory Audit Information – Each time a change is made to a part number such as a change to description or class or anything in IN-B, Standard Cost, Base Price, MRP Parameters, a record is saved in each of the Inventory Audit files ISICADT and ISMICADT. If you frequently roll up Standard Cost, these files can quickly get large. This audit information can be selectively cleared in SM-J-S based on date, Item number range and source of information. Files to reindex after SM-J-S are ISICADT and ISMICADT.