

CM/Archive

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Dear ConSol customers, dear ConSol CM customers,

We would like to present you CM/Archive, a new ConSol CM add-on.

CM/Archive provides the possibility to permanently store cases outside the ConSol CM database:

- Reduce the size of the ConSol CM database and the related costs.
- Keep the cases to comply with legal requirements and for future reference.

We hope that you enjoy reading this presentation and discovering CM/Archive.

Please contact us to see a live demo. We are happy to help you with questions about your ConSol CM system.

Your ConSol CM Product management & Sales team



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CM/Archive overview

- Advantages
- Features



CM/ARCHIVE

User name *

Password *

LOG IN

Advantages of CM/Archive

Save old cases in CM/Archive instead of the production database

- Free space on the production database
- Reduce the costs for database storage
- Reduce the load on your production database and improve the overall system performance



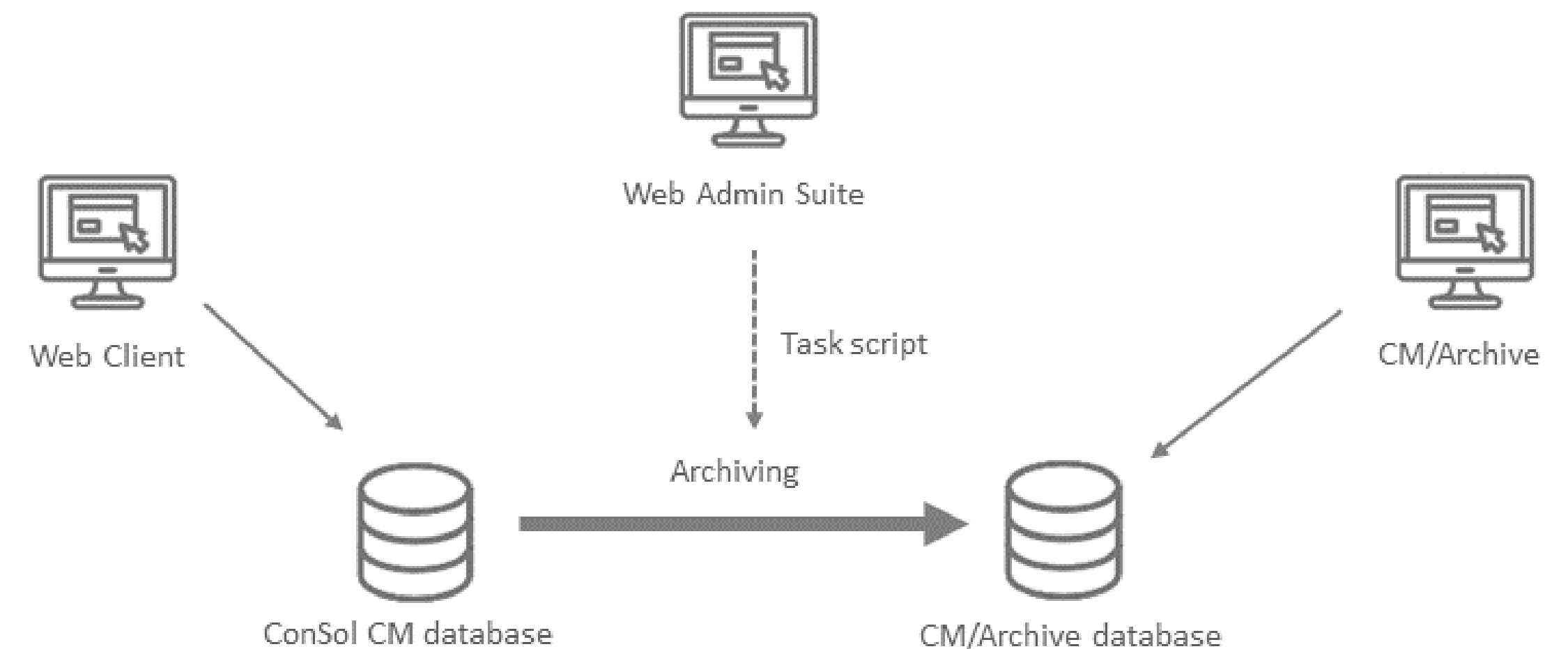
- Keep all cases in in CM/Archive to comply with legal requirements
- Access the cases in CM/Archive to use them as a reference

*If the Web Client should always be the first place to go:
Keep the basic case data in the Web Client and archive the case history.*

Features of CM/Archive

Operating principle of CM/Archive

- Archiving is done using a task in the Web Admin Suite
- Access to the current cases using the Web Client
- Access to the old cases using CM/Archive
- Data of the case contact is also available in CM/Archive



Features of CM/Archive

Maximum flexibility for determining the archiving scope

You can freely determine the scope of archiving to match your business requirements:

- Which cases should be archived? This can be decided based on criteria.
- Should the archived cases be completely deleted from the Web Client?
- Which parts of the case history should be deleted (everything, only attachments, only history entries)?
- Should the cases remain in the DWH?

Example:

We want to archive all cases which were closed more than 5 years ago. The cases should not be removed from the Web Client, because our users always look there first. Therefore, we remove the case history to free space on the production database. The cases are not needed in the DWH anymore.

Features of CM/Archive

Remove case data from the production database

There are several options:

- Completely remove the cases
 - The cases cannot be found in the Web Client anymore.
- Keep basic case data
 - The basic case data is kept in the Web Client. Only the case history is deleted. The cases can still be found in the Web Client using search features.
- Keep cases in the DWH
 - The cases can be kept in the DWH if long-term reports are needed.

Features of CM/Archive

View partially archived cases in the Web Client

- The cases can be found in the quick and detail search.
- The case data (fields, contacts, relations, etc.) is still available.
- The case history was removed. You can configure which kind of history entries should be deleted.
- There is a link to open the case in CM/Archive.

The case history contains an entry that the case was archived.

Ticket (ARCHIVED) ☆ Save as favorite Open in archive application

100308 • Outgoing Mail: Subject+Body Encoding in UTF-8
HelpDesk 1st Level Closed webadmin 12/13/22, 3:20 PM

Priority
normal

Module
inventory

Reaction time
12/14/22 3:20 PM

Country
USA

Contacts (1) ...

No relations ...

No related resources ...

Communication and history ^

Detail level Low Show All entries Sort by Newest entries first

1 minute ago #2 changed by System Task
▪ Archived

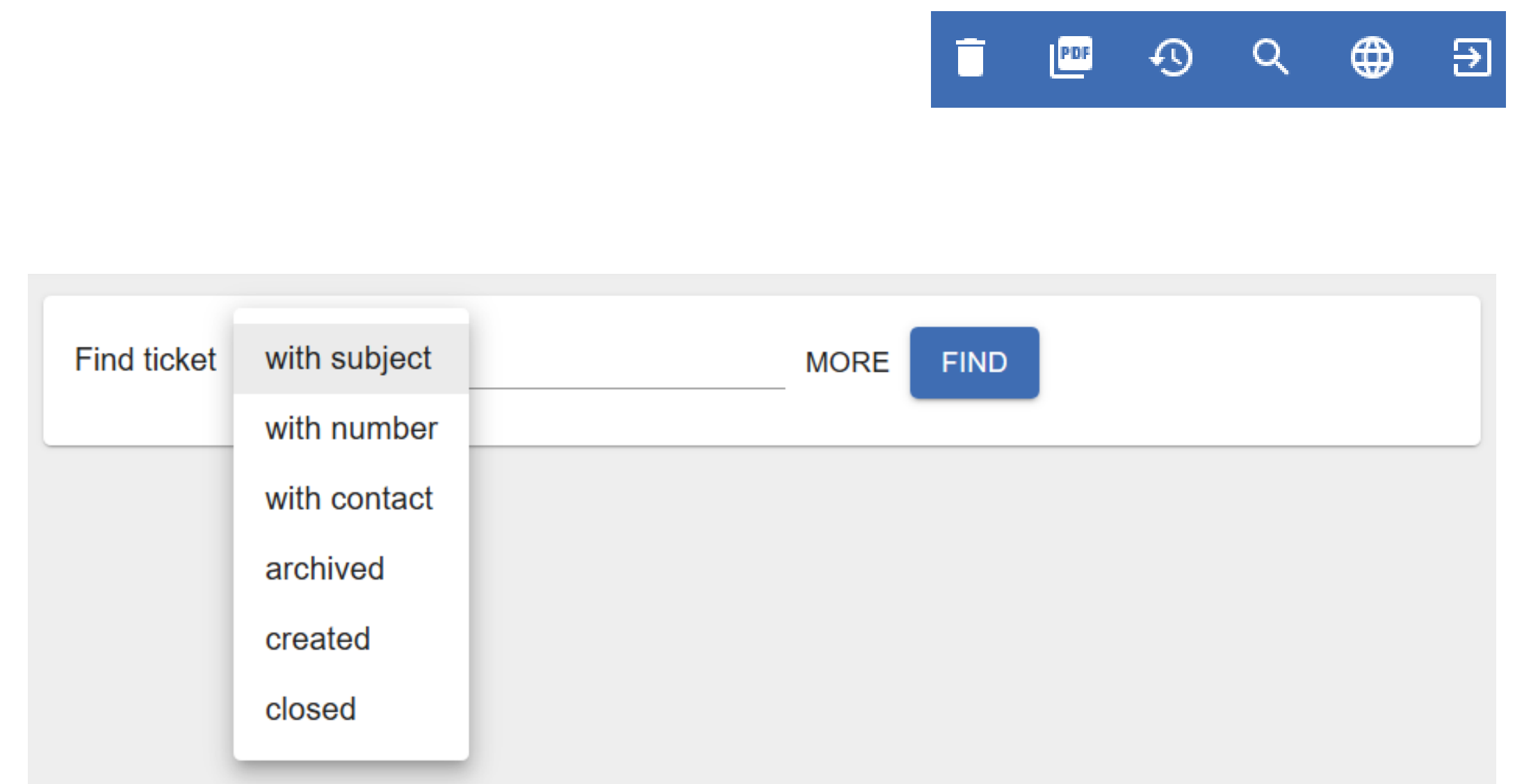
No attachments ...

Features of CM/Archive

View archived cases in CM/Archive

CM/Archive offers a number of features for the archived cases:

- Search for archived cases with different criteria
- View an archived case, including its contact data
- Create a PDF from an archived case
- Delete a case from the archive
- View archiving statistics



All cases in the archive are read-only and cannot be modified.



Here you will find the official manuals for the process management software [ConSol CM](#).

☐ PDF ☐ Online Help ☐ English ☐ Deutsch

☐ User ☐ Administrator ☐ Process Designer ☐ CM/Outlook-Add-in ☐ DWH ☐ Setup and Operation ☐ CM/EBIA

☒ Latest version ☐ Version 6.15.2 ☐ Version 6.15.1 ☐ Version 6.15.0 ☐ Version 6.14.0.10 ☐ Version 6.14.0.9

☐ Version 6.14.0.8 ☐ Version 6.14.0.7 ☐ Version 6.14.0.6 ☐ Version 6.14.0.5 ☐ Version 6.14.0.4 ☐ Version 6.14.0.3



☐ Version 6.14.0.2 ☐ Version 6.14.0.1 ☐ Version 6.14.0.0 ☐ Version 6.13.0.6 ☐ Version 6.13.0.5 ☐ Version 6.13.0.4

☐ Version 6.13.0.3 ☐ Version 6.13.0.1 ☐ Version 6.13.0.0 ☐ Version 6.12.1.3 ☐ Older versions

User

	Online Help	User Manual 6.15.1 (English)
	PDF	User Manual 6.15.1 (English)
	Online Help	Benutzerhandbuch 6.15.1 (Deutsch)
	PDF	Benutzerhandbuch 6.15.1 (Deutsch)



Administrator

	Online Help	Administrator Manual 6.15 (English)
	Online Help	Administratorhandbuch 6.15 (Deutsch)

Process Designer

	Online Help	Process Designer Manual 6.13.0.3 (English)
	PDF	Process Designer Manual 6.13.0.3 (English)

DWH

	Online Help	DWH Manual 6.11.0 (English)
	PDF	DWH Manual 6.11.0 (English)

Setup and Operation

	Online Help	Setup Manual 6.15 (English)
	PDF	Setup Manual 6.15 (English)
	Online Help	Operations Manual 6.15 (English)

You want to learn more about ConSol CM?

Visit our [TecDoc server](#)

You can find:

- **Manuals**
 - **Administrator**
 - **User**
- **Release Notes**
- **System Requirements**
- **Feature presentations**
- **Solutions**

Discover the new ConSol CM version!