



SAP Fieldglass 

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Archival Data Guide

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1 Archival Overview

Introduces the archival process and functionality.

Most documents are archived based on specific rules and a set amount of time. Archived records can be retrieved through two methods:

- Navigating to an Archive Data page and viewing an object: The individual archived data page displays the details in a name-value pair format.
- Using the Archive Data page list view to perform bulk downloads: The bulk archive download lists multiple records that can be selected for downloading. After the system compiles the requested data into XML files (it can take several minutes), the user can retrieve the data to their browser in a compressed ZIP format that contains the XML files.

The data archiving threshold is set to 3 years by default for new companies. Existing companies can ask for an exemption or a different default archiving threshold. You can change the data archiving threshold on the Company Details page by choosing the *Data Archiving Threshold* dropdown menu. Once the archiving process starts, you can only change the threshold to a lower value, not a higher one. For example, if the *Data Archiving Threshold* is set to *3 years*, you can't change it to *4 years* or *Don't Archive*.

Suppliers can view and download all the available data with no restrictions, including audit trails and approvals. Company configurations that restrict data visibility to specific record information do not affect access to archived information. A user with access to archived data (as described in [User Profile Setup \[page 6\]](#)) can view all the fields available on a record. One exception is encrypted fields, that are only visible to users with user profile flag *View and Report on Sensitive Data*.

When performing a universal search, the results do not include records that are archived. Archived records can only be searched through the Archive Data page. Data that is archived is not included in reports.

1.1 Archiving Criteria

The documents archived are based on specific rules and timing described in this topic.


The documents are archived depending on the specific rules and timing listed in the table. Other administration data is never archived (examples include business units, cost centers, and users).

Documents	Archived Identification Criteria
Assignments and Resources	Are not archived.
Consolidated invoice	Once all the invoices associated to the consolidated invoice are archived and the consolidated invoice is past 36 months its end date, it is archived. All invoices associated to the consolidated invoice are archived before the consolidated invoice itself is archived.

Documents**Archived Identification Criteria**

Consolidated worker	Consolidated worker records are not archived. Other worker records associated with the consolidated worker can be archived, but the consolidated worker record itself will never be archived. You can view associated worker records that have been archived under the Assignments tab, however, the archived worker record Details pages can only be accessed from the Past and Archived Data page from the Admin menu.
Decision Form	Decision form is archived 36 months after its end date. If decision form has a child such as job posting, statement of work, RFX, or profile worker, then the decision form is only archived after all its children are archived and the decision form is past 36 months its end date.
Job Posting and all associated data (worker, time sheet, expense sheet, invoice, consolidated invoice, and any other docs related to the job posting)	A Job posting without any workers is archived 36 months after the job posting has closed. A job posting with workers is archived 36 months after the most recent worker's end date.
Profile worker	Archived 36 months after the latest worker end date (irrespective of whether the worker is closed). Profile worker records without an end date and in the open status are not archived.
Project	Projects are archived 36 months after end date if they do not have an active job posting, RFX, or statement of work associated to it.
RFX	RFXs are archived 36 months after the RFX end date. If the RFX has at least one child (such as a statement of work) which is not yet archived, then the RFX is not archived until all its children are archived and the RFX is 36 months past its end date.
Statement of work and all associated data (line items, worker, time sheet, expense sheet, invoice, consolidated invoice, and any other docs related to the statement of work)	Archived 36 months after the statement of work end date (irrespective of whether the statement of work has been closed). Master statement of work and child statement of work: A master statement of work is only archived after all its child statement of works are archived and the master statement of work is past its end date by 36 months. SOW Bid and SOW: An SOW Bid is archived only after the related SOW is archived and the bid is past its end date by 36 months.

All workers and characteristics are eligible for archiving when the listed criteria for the corresponding statement of work is fulfilled.

 Note

The existing behavior of the Preservation functionality supersedes the archival functionality. Preservation prohibits the record from being archived. When the company configuration of *Enable Preservation Indicator for Archival* is enabled, job seekers, workers, resources, and statements of work can be marked with preservation on, which means that when eligible for archiving, all data pertaining to the job seeker, worker, resource, or statement of work is preserved until the litigation is complete. The *Turn Preservation On* and *Turn Preservation Off* options display on the Actions menu of job seekers, workers, resources, and statements of works when the rule is enabled.

2 User Profile Setup

Describes the user profile flag required for access to the archive.

The *Access Archived Data* user profile flag must be enabled so users can access the archived data and also download selected archived records to their local machine.

The *Access Archived Data* flag enables administrators permission to give non-administrator users access to archived data. Although non-administrator users can access to archived data, only administrators have permission to edit the user profile flag.

When the *Access Archived Data* user profile flag is enabled for MSP users that are part of a multi-MSP company, they can only view the archived data for which they have authorization.

Users with the *View and Report on Sensitive Data* flag enabled can also see encrypted information as plain text.

3 Preservation Indicator to Prevent Archiving or Data Erasure Company Configuration

Describes how the *Preservation indicator to prevent archiving or data erasure* company configuration affects data that is ready to be archived.

When the configuration is enabled, the preservation indicator can be set on specific records to stop them from being archived or the data being erased when the data erasure functionality is enabled. The *Turn Preservation On* and *Turn Preservation Off* options display on the Actions menu for job seekers, statements of work, resources, and all worker type records. If records must be preserved and not archived until a litigation investigation is complete, select *Turn Preservation On* for the record and, even if it fits other criteria for archiving, all data pertaining to the record is preserved until the litigation is complete.

Once the record no longer needs to be preserved, select the *Turn Preservation Off* flag from the Actions menu.

4 Viewing Individual Archived Records

Describes how individual archived records can be viewed and downloaded.

Located on the Archive Data tab, archived records of contingent labor, services, workers, resources, and payments can be selected and viewed. Personal identifiable information (PII) can also be requested for erasure.

Data is archived in the language of the creator and the default language of the company. If the user accessing the archived data is:

- the creator, the language of the document is in the language of the user.
- not the creator, the language of the document is in the company's default language.
- not the creator but uses the same language as the creator, the language of the document is in the language of the user.

To view archived records:

1. From the home page, select the [Admin](#) menu and, under the [Past Data](#) section, choose [Past and Archive Data](#).
2. Select the [Archive Data](#) tab.

Depending on the configuration of the user's company, some or all these modules may appear on the page:

- Job Posting
 - Job Seeker
 - Statement of Work
 - Statement of Work Bid
 - Statement of Work Line Items
 - Resource
 - Decision Form
 - Project
 - Work Order
 - Worker (Activity item, milestone, and off boarding activity items are part of a worker details page in the worker record.)
 - Time Sheet
 - Expense Sheet
 - Invoice
 - Credit Debit Memo
 - Miscellaneous Invoice
 - Consolidated Invoice
3. Choose the link to the type of record desired.
 4. Enter the desired time period in the past, along with any other information you would like to highlight, and select [Filter](#).
A list of records displays.
 5. Choose the individual record that you want to view.
The record is displayed in a name-value pair format.
 6. If desired, the record can be downloaded to your browser in an XML format by selecting [Download](#).

5 Downloading Multiple Archived Documents to Your Browser

Shows how the Download function enables you to transfer multiple selected archived records to your browser.

Located on the Archive Data tab, multiple archived records of contingent labor, services, workers, resources, and payments can be selected and compiled. After compiling, the user can download the data to their browser as XML files compressed into a ZIP format.

To obtain archived records:

1. Navigate to the Admin menu and choose *Past & Archive Data* under Past Data.
2. Select the *Archive Data* tab to view all the archived data grouped by modules. The modules listed depends on the company and its configuration.
3. Choose the link to the type of record desired.
4. Enter the desired time period in the past, along with any other information you would like to highlight, and select *Filter*.
5. Check the records for downloading (up to 100) and select *Download*.
6. Choose the format that you want the items. The items are compiled and pushed to your browser as a ZIP file.

Note

Generating the download can take several minutes. Select *View Archive Downloads* to view the status of the download. For more information, see *Archived Downloads [page 9]*.

5.1 Archived Downloads

Describes how to check the download status and access the requested archived data downloads.

To view all previous archival downloads, on the Record Details page, select *View Archive Downloads* to monitor the status of a download, or access previous archived download documents. To update the page, choose *Refresh*.

To download a previous archive download, select the archive entry and choose *Download*.

Archived Data Reports and Downloads

Choosing the *View Downloads* link on the Archive Data page takes you to the Archive Downloads list view page, which shows a list of all completed reports and downloads for archived data. You can filter the date range on this page to view download and report records based on when they were run. When archive data module records are individually downloaded from the existing archive data module records lists, the download history now appears in Archive Downloads for 90 days.

6 Reporting on Archived Data

You can view reports and downloads for archived data on the Archive Data page.

You can view and run a list of predefined archive data reports by navigating to the Past and Archive Data admin page and choosing the [View Reports](#) link, which navigates you to the Archived: All Reports page. The [View Downloads](#) link navigates you to the Archive Downloads list view page, where you can view a list of completed reports and downloads for archived data. The [Access Archived Data](#) user role permission is required to view the Archive Data page.

Archived Data Reports and Downloads

Choosing the [View Reports](#) link directs you to the Archived: All Reports page, which shows a list view page with several predefined reports you can use for archived data. You can also access any ad-hoc reports you've created for the Worker module on this page. Archive reporting on profile workers can be included with workers, allowing you to have all workers on the same report. Choosing one of the report names from the list navigates you to the Details page for that report, where you can run the report and view previous runs.

Archive reporting can be performed for individual statement of work line items including Event, Fee, Fee Response, Schedule, and Management Event.

Archived Data Downloads

Choosing the [View Downloads](#) link takes you to the Archive Downloads list view page, which shows a list of all completed reports and downloads for archived data. You can filter the date range on this page to view download and report records based on when they were run. When archive data module records are individually downloaded from the existing archive data module records lists, the download history appears in Archive Downloads for 90 days.

7 Integration and Archived Documents

Describes how the archived data is processed for integration downloads.

Once the data is archived, it is deleted from the database, no longer transferred through the download connectors (including Worker Security download connector), nor be cited for rehires.

Archived records are retrieved through the Archive Data page. The standard upload connectors 'User Upload' and 'User with Signature Authority Upload' contain the column Access Archived Data. Those users that have the Access Archived Data flagged as 'Yes' will have access to the archived data through the Archive Data page.

After May 2022, the Worker Security download connector will no longer transfer archived worker data.

8 System Audit Trail

The archival records that are requested are captured by the System Audit Trail.



Audit Trail	Done By	Module	Activity	Source
Buyer	The user that initiated the archive download.	Archive	Download Data	The format of the Source column will be FileName_TransactionID. For example: Job Posting_z20092414344592764304165
Supplier	The user that initiated the archive download.	Archive	Download Data	The format of the Source column will be FileName_TransactionID. For example: Job Posting_z20092414344592764304165

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