



# The ASM Archiving Web Service

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## User Guide

Version: 3

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**asm**  
agency sector management

Ashford House, 41-45 Church Road  
Ashford, Middlesex  
TW15 2TQ

☎ +44 (0)1784 242200    ✉ admin@asm.org.uk    🌐 www.asm.org.uk

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## Overview

The ASM archiving solution removes data from Sequoia and adds it to the archive database.

All the documents and reports that were produced by Sequoia and any additional documents added by users are then available to view and/or print. These include a job report for each archived job (generated when the job is archived).

The following records are archived as part of this process:

- Jobs
- Customs Declarations
- Shipments
- Agent Inventory records
- Consolidations
- Transit Movements
- Sales invoices/Credit Notes
- Collection and delivery notes
- Air waybills/Bills of Lading
- Manifests
- User added documents

Once the above records are identified and recorded in the archive, the data for them is permanently deleted from the Sequoia database.

**IMPORTANT NOTE:** The process of archiving data from Sequoia is not reversible.



## Before You Start

Before you start to use the archiving service, there are a few things you need to do first.

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1 The service needs to be installed by running the [Asm.Archiving.Installer.msi](#) installer file. See [Installing the Archiving Application](#) for details of how to do this.

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2 Configuration details need to be added before an archive can be created. This can be done by accessing the 'Admin' page of the ASM Archiving web page using the password set up when you installed the service. See the [Admin](#) section below for more details.

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## Using the Archiving Web Application

ASM Archiving is a web based application, accessed by using the address configured during installation (if this has been changed you will need to get the address from whoever installed the application).

The default address is <http://SequoiaServer:14555>

The application will open in your web browser, at the 'Search Archive' page.

The screenshot shows the 'Search Archive' page of the ASM Archiving Web Application. On the left is a sidebar menu with four items: 'Dashboard', 'Search', 'History', and 'Admin'. The 'Search' item is circled in blue. The main content area has a search bar with a 'Search' button. Below the search bar is a table with the following columns: Type, Mode, Reference, Entry No., Consignor, and Consignee. The table currently displays 'No data to display'. Below the table is a section titled 'Associated Documents:' which also displays 'No data to display'.

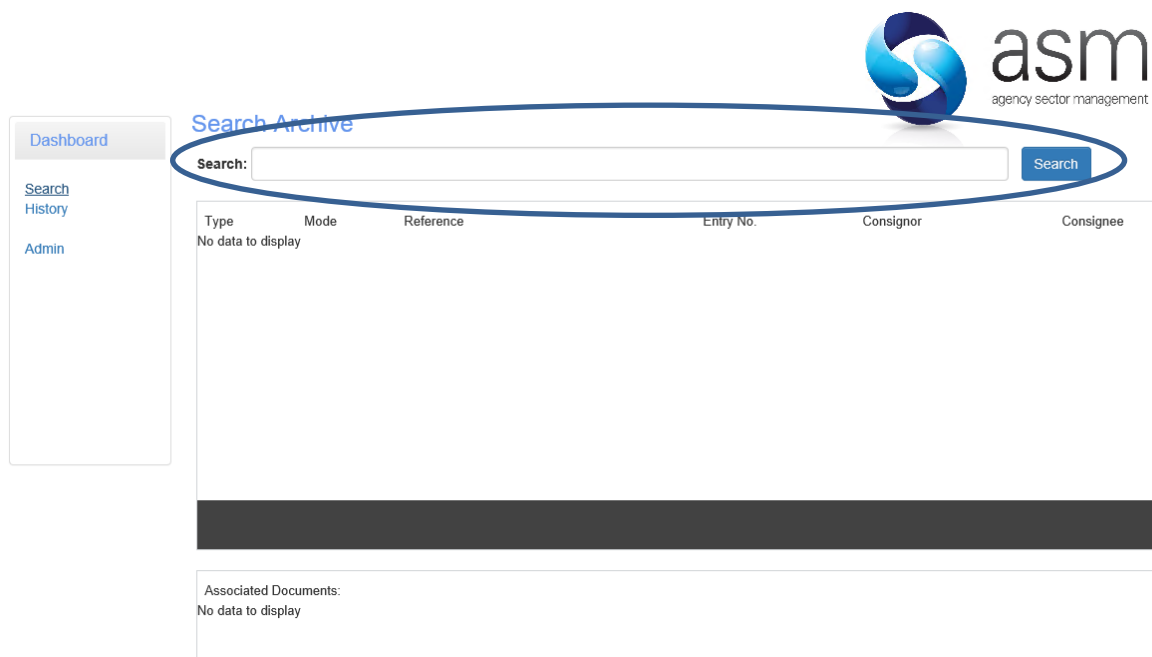
The Dashboard menu to the left of the page (as circled above) has three options:

- Search
- History
- Admin



## Search

Selecting 'Search' from the dashboard menu will display the 'Search Archive' page as shown below.



The Archive Search Criteria can be added here to search through all existing Archives (circled above).

### Entering Search Criteria

#### Search For:

You can enter any text here. The resulting search will display any records in the archive that match what you have typed.

These can be partial matches      If you type **BC** then a job reference in the archive of **ABC12345** will appear in the results.

The search is not case sensitive      If you type **bc** then a job reference in the archive of **ABC12345** will appear in the results.

Try to be as specific as possible. Typing only a small part of what you are searching for could result in a lot of records being displayed in the results.



For example, if you are searching for a declaration UCR of 8GB493948289000-ABC12345 if 8GB is added to the search for box, the results will display all DUCRs beginning with 8GB. Any jobs, agent inventory, shipment and consolidation records associated with those declarations will be displayed with the returned results.

## Displaying Search Results

Once the search criteria has been added, click [Search]

The search results will be displayed in the list (as shown below).

The screenshot shows the 'Search Archive' interface. At the top right is the ASM logo with the text 'asm agency sector management'. Below the logo is a search bar containing '6GB493594008000' and a 'Search' button. Below the search bar is a table of search results. The table has columns for Type, Mode, Reference, Entry No., Consignor, and Consignee. The results are grouped by Reference number (061-51144779 TEST1234 and 061-51144780 TEST1234). Each group contains rows for Job, Declaration, and Import Inventory. The Declaration rows show a link to a document. At the bottom of the screenshot, a pagination bar shows page 15 of 15.

Type	Mode	Reference	Entry No.	Consignor	Consignee
Import Inventory		061-51144779 TEST1234			
Job	Air Import	JJ5114477911		US Importer Exporter Inc	UK IMPORTER E
Declaration	IFD	6GB493594008000-JJ5114477911		US IMPORTER AND EXPORTER	UK IMPORTER E
Import Inventory		061-51144780 TEST1234			
Job	Air Import	JJ5114478011		US Importer Exporter Inc	UK IMPORTER E
Declaration	IFD	6GB493594008000-JJ5114478011		US IMPORTER AND EXPORTER	UK IMPORTER E
Import Inventory		061-51144781 TEST1234			
Job	Air Import	JJ51144781		US Importer Exporter Inc	UK IMPORTER E
Declaration	IFD	6GB493594008000-JJ51144781		US IMPORTER AND EXPORTER	UK IMPORTER E

The search results will include all records related to the search criteria. For example if the search results returned a declaration that matched a DUCR, and that declaration was linked to a job in Sequoia, the job would also appear on the list of results.

Once you have found what you are searching for, selecting the record in the list will show any associated documents (as shown right).

Clicking on the selected document will open the selected report, as a PDF.

The screenshot shows a document details view. At the top, there is a header with 'Job', 'Air Import', and 'JENIMP190116A'. Below this is a table with columns for Type, Mode, Reference, and Entry No. The first row is highlighted in blue and contains 'Declaration', 'IFD', '6GB493594008000-JENIMP190116A', and '120-0010'. Below the table, there is a section titled 'Associated Documents:' which contains two links: 'C88REPORT-IMPORT DECLARATION (C88)' and 'DTI-E2-IMPORT ENTRY ACCEPTANCE ADVICE'. The second link is circled in blue.





## History

The history page shows the date/time that archives were started and completed, along with the date that the data has been archived up until.



### Archive History

Time Of Message	Message
19/05/2018 06:08:21	Completed archiving Sequoia data up to 01/01/2017
18/05/2018 13:58:57	Started to archive Sequoia data up to 01/01/2017

2 total

Deleted archives will display that an archive has been deleted and the date the data was deleted up until.



## Admin

The Admin page can only be accessed using the Admin Password, this will have been specified during installation.

The admin page allows:

- Configuration of the archive
- Archive data from Sequoia
- Delete archive data

The configuration page will be displayed upon successful logon (as shown below).

The screenshot shows the Admin Configuration page. On the left is a sidebar menu with 'Dashboard', 'Search', 'History', and 'Admin'. The main content area has three tabs: 'Configuration' (circled in blue), 'Archive Sequoia', and 'Delete Archive'. Below the tabs are three input fields:

- Sequoia DB connection string:** Integrated Security=SSPI;Persist Security Info=False;Initial Catalog=SequoiaDB;Data Source=DEVBACT\SQL
- Sequoia Data Warehouse connection string:** Integrated Security=SSPI;Persist Security Info=False;Initial Catalog=SequoiaDataWarehouseDB;Data Source=C
- Document Repository Location:** C:\ArchiveDocuments

A 'Set Config' button is located at the bottom right of the configuration area.

Before an Archive can be run, the Configuration page will need to be completed.

## Configuration

Data/Label	Details
Sequoia DB connection string:	Required in order to extract and delete the data from the Sequoia database.
Sequoia Data Warehouse connection string:	Required in order to delete any declarations which are archived.
Document Repository Location:	The location to which archived documents are written.



Complete the required details and click [Set Config] if the added data is correct a 'Configuration saved successfully' message will be displayed.

If there are errors, such as an invalid connection string, a message will be displayed explaining what data is incorrect.

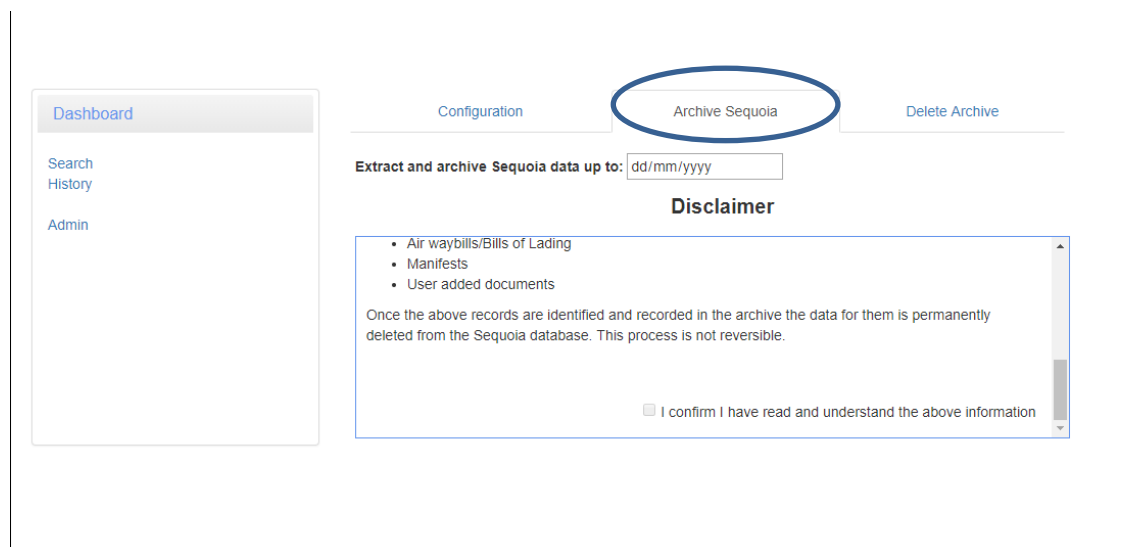
## Archive Sequoia

Once the configuration has successfully been saved, an Archive can then be created, by clicking the 'Archive Sequoia' tab.

Note: The ASM Sequoia Services will need to be running for an Archive to be completed.

The Archive Sequoia page will load where the date up to which you would like the data to be extracted and archived can be set.

Archiving Sequoia data is not a 'one time' process. Subsequent archives will add data to the same archive.




The [Extract and Archive] button will NOT be displayed until the Disclaimer has been read. Add the 'Extract and archive Sequoia data up to' date, and carefully read the Disclaimer. Once this process starts it is irreversible.

Read through the disclaimer and tick the 'I confirm I have read and understand the above information' checkbox. The [Extract and Archive] button will then appear.



Click [Extract and Archive], the Archive process will then begin. The progress will be displayed.

Archiving Progress: 

Processing: 136 of 35716 Records

Total number of errors: (0) [View Errors](#)

[Stop Archiving](#)

The archive process will archive one Sequoia record at a time to ensure a safe migration of the records being archived.

### Stopping the archive process

The Archive can be stopped at any point by clicking the [Stop Archiving] button. Once the [Stop Archiving] button has been clicked, it will finish archiving the current record then stop.

NOTE: Stopping the archive process will NOT roll back data that has already been archived. Records that have been archived can be found using the Search Archive option. Any records not yet archived will still be available in to view via the Sequoia Client.

### Archiving errors

If any errors occur during the archive process, they will be shown in the Archive progress section. The records which have failed, for whatever reason, will not be deleted from the Sequoia database.

We ensure that the data is safely archived before attempting to delete any related data from the sequoia database. This ensures that an instance of this record will either be stored in the archive database, or remain in the Sequoia database.

For more information on why a record failed to be archived, refer to the ASM.Archiving.WebServer.log and search for the REF# given in the error message. The log file can be found in C:\ProgramData\ASM\Sequoia\LogFiles on the machine that ASM Archiving has been installed. Otherwise contact the ASM Helpdesk for further assistance.



## Delete Archive

The Delete Archive page allows you to specify the date up to which you would like the archiving data to be deleted.

Configuration Archive Sequoia **Delete Archive**

Delete archive data up to:

**Disclaimer**

This process will delete data from your archive database.

Once you confirm the deletion, all the records in the archive database (up to the date you have specified) will get deleted and you will not be able to access any documents or data relating to them. This process is not reversible.

You are advised to take a backup copy of the archive data before deleting.

I confirm I have read and understand the above information

The [Delete] button will not appear until the disclaimer has been read and the 'I confirm I have read and understand the above information' checkbox has been enabled.

Clicking the [Delete] button will permanently delete all data and associated reports from your Archive. You will not be able to search or access that data or any associated documents or reports again.



## Installing the Archiving Web Service

Run the Asm.Archiving.Installer.msi installer file to install the ASM Archiving Service. Administrative rights will be needed.

It is recommended that the ASM Archiving Service is installed on the same server as the ASM Sequoia Services.

The archiving application uses MongoDB, a free and open-source cross-platform document-oriented database, to store archiving data.

When the installation has completed, the setup window will open.

**ASM Archiving Service Setup**

**Application Configuration**  
Application url is the URL which the browser will use to connect to the Archiving Service  
WebSocket Port is used for callback purposes.

**Application URL** **Port**  
http://SequoiaServer 14555

**Web Socket Port**  
14556

**Archive Database**  
MongoDB is the database used to store the Archive data. The URL defines the Mongo Service Endpoint. The MongoDB Data Location can be specified if you do not want to store the data in the default location. The MongoDB Instance can be overridden if you would prefer to host your own MongoDB Instance. A MongoDB connection string should be provided if this is the case.

**MongoDB URL** **Port**  
localhost 27017

**MongoDB Data Location**  
C:\ProgramData\ASM\Sequoia\ArchivedData\Database

**Override Mongo DB Instance (Tick if you are hosting the MongoDB instance)**

**MongoDB Connection string**  
mongodb://Username:Password@localhost:27017 **Test Connection**

**Security Configuration**  
The Administrator Password is used to access the Admin section of the Archiving Service (This provides access to the Archive Creation/Deletion functionality)

**Administrator Password**  
Password Confirm Password

**Service Configuration**  
ASM Archiving Service Automatic

**Service Account:** .\Administrator

**Save**

## The ASM Archiving Web Service



The following table explains each field of the setup

Data/Label	Details
Application URL and Port	The URL (address) is the address which the browser will use to connect to the Archiving service. Defaults to 'http://SequoiaServer' and port 14555
Web Socket Port	The port used for 'callback' purposes. Defaults to port 14556
MongoDB URL and Port	These are used to build a connection string for the Archiving service to communicate with MongoDB.  Defaults to URL 'localhost' and port 27017 for a connection string of 'mongodb://localhost:27017'
MongoDB Data Location	The location where MongoDB will store the archived data.  <u>NOTE</u> : changing this value after any Sequoia data has been archived will <u>not</u> migrate any existing archived data to the new location. In order to migrate the data, you must stop the archiving service, move the archive data manually to the desired location, then update the value in the above MongoDB Data Location prior to restarting the Archiving Service.
Override MongoDB Instance MongoDB Connection String	Selecting this option will enable MongoDB Connection string field, allowing you to specify your own MongoDB Connection String.  <u>NOTE</u> : enabling this option will disable the MongoDB URL/Port & MongoDB data Location fields, as they are no longer required.
Administrator Password	Password that will be used in the Archiving App to access the 'Admin' functions, i.e. Archive Sequoia Data.
ASM Archiving Service	Service Start up mode will default to 'Automatic'
Service Account	Specify a Service Account that has access to the SequoiaDB, SequoiaDataWarehouseDB and has Read & Write access to the Archive Document Repository.

When you have completed the setup click [Save].



## Data Stored in the Archive

An Archive will store the following key information from the following records:

- Jobs
- Customs Declarations
- Shipments
- Agent Inventory records
- Consolidations
- Transit Movements
- Sales invoices
- Collection and delivery notes
- Air waybills/Bills of Lading
- Manifests
- User added documents

The following data is stored for each of the above records.

### Job:

- Job Reference
- Customer Shortcode and Name
- Consignor Shortcode and Name
- Consignee Shortcode and Name
- External References

### Declaration:

- Trader Reference
- DUCR + Part No
- EPU, Entry No and Entry Date e.g. "120-123456X-17/05/2013"
- MRN
- MUCR
- Consignor Shortcode and Name (From header or item level)
- Consignee Shortcode and Name (From header or item level)

### Shipment, Consolidation and Agent Inventory

- Master
- House





## Job Costing:

- Sales Invoice Number
- Credit Note Number

## NCTS Movement:

- MRN
- LRN
- Consignor Shortcode and Name
- Consignee Shortcode and Name



## Document Information

### Document Properties

Title	The ASM Archiving Application
Author	Sana Janjua
Version	3
Status	Release
Created	29/12/2017 15:23
Last modified	21/05/2018 09:48

### Revision Sheet

Version	Date	Author	Details
0.1	29/12/2017	Sana Janjua	Initial draft for review
0.2	05/01/2018	Sana Janjua	Updated following review.
1	12/04/2018	Simon Adams	Clarifications and more detail.
2	02/05/2018	Simon Adams	Added more detail to the configuration/setup – notably regarding MongoDB.
3	10/05/2018	Jenny Hill	Updated/Re-wrote sections, and screen shots.
3	21/05/2018	Jenny Hill	Added newer/updated screen shots.