



Purge Process Guide

for the **V6 System** Software

November 2018

The Retail Technology Group (RTG) recommends completing the procedures in this guide as needed to address performance issues and maintain a clean, up-to-date database.

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Publication Information

Purge Process Guide for the V6 System Software
November 2018

Overview

The following purges (located under the **Resets** option in the IMS menu bar) may be run to clean up and reduce the amount of data in the IMS database.

► Before completing any of these purges, be sure to [Manually Back Up the System](#). Once purged, the data CANNOT be retrieved.

- **Cleanups**
This utility includes many cleanup options (e.g., “Remove all 0 balance layaways and all 0 balance gifts” or “Recalculate On-Order Quantities”).
- **A/R History Purge**
This option purges all Accounts Receivable History for all A/R customers that occurred prior to a selected date.
- **Audit Purge**
This option purges all Records in the Audit table that occurred prior to a selected date.
- **Item Receipts History Purge**
This option purges all Receiving history on all Items that occurred prior to a selected date.
- **EventLog Purge**
This option purges all records in the General tab of the Event Log that occurred prior to a selected date.
- **Physical Count History Purge**
This option purges all history of Physical counts on Items that occurred prior to a selected date.
- **Sales History Purge**
This option purges all Sales Invoice History (Sales Orders that have been updated) that occurred prior to a selected date.
- **Shipping Purge**
This option purges all Shipping history that occurred prior to a selected date.
- **Tran Log Purge**
This option purges all Point of Sale transactions that occurred prior to a selected date.
- **Mail List Purge**
This option purges all Mail Detail records of Customers that occurred prior to a selected date.
- **GL Posting History Purge**
This option purges all General Ledger history that occurred prior to a selected date.
- **GL Transaction Purge**
This option purges all General Ledger Transactions that occurred prior to a selected date.

► For questions regarding these procedures, please contact the RTG Support Line at 1-800-547-7120 or Support@RTGHoldings.com.

Manually Back Up the System

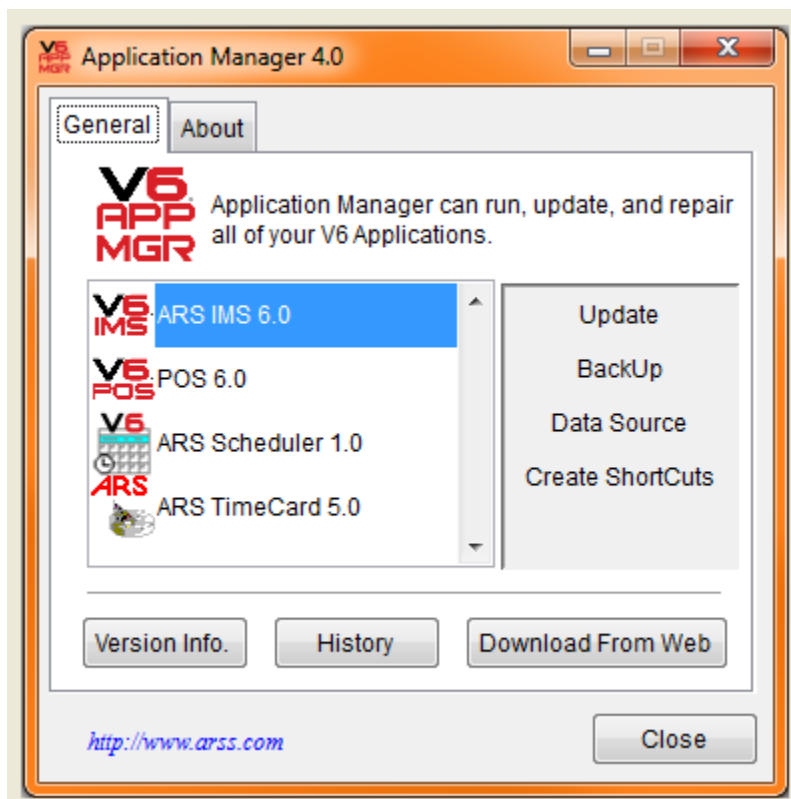
Before completing any of the other procedures in this guide, complete the following procedure to perform a manual backup of the system.

- ▶ A manual backup is recommended even if a third-party backup service (e.g., Data Safe) is in use.

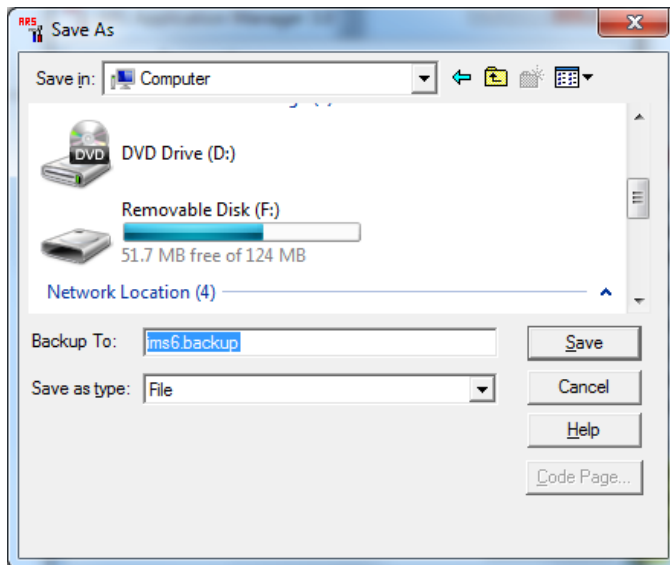
1. Insert a portable USB drive in a USB port.



2. Click the **ARS AppManager** icon on the desktop to display the **ARS Application Manager** window.



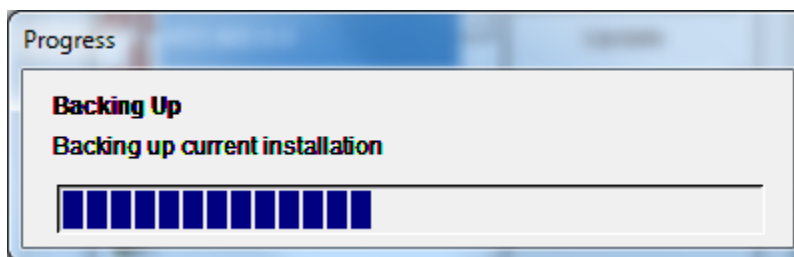
3. Select the **ARS IMS 6.0** option.
4. Click the **BackUp** button to display a **Save As** window.



5. Navigate to and click the portable USB drive (**Removable Disk**).
6. Enter a distinctive name for the backup file in the **Backup To** field.

► To avoid overwriting files, give the file a unique name (e.g., 2014_December_ims6.backup) rather than the default (ims6.backup) name.

7. Click the **Save** button to display the **Progress** window.



8. When the **Progress** window closes to indicate the backup procedure is complete, remove the USB drive and place it in a secure, preferably off-site location.

Execute Recommended Purges

The IMS database should be periodically purged of unneeded and unnecessary information to maintain optimal performance. RTG recommends regularly executing the following purges to save space and keep the system running smoothly:

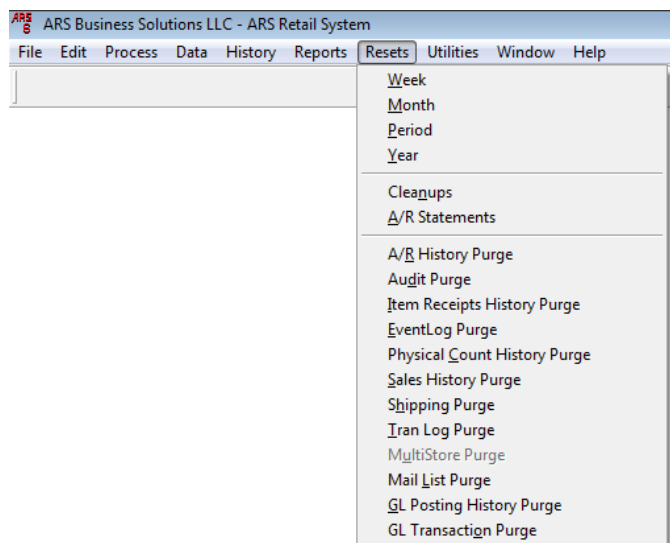
- Audit Purge
- Event Log Purge
- Tran Log Purge
- GL Posting History Purge
- GL Transaction Purge

► Other purges may be executed as needed to remove unwanted data.

Complete the following procedure to execute the recommended purges:

► For questions regarding this procedure, please contact the RTG Support Line at 1-800-547-7120 or Support@RTGHoldings.com.

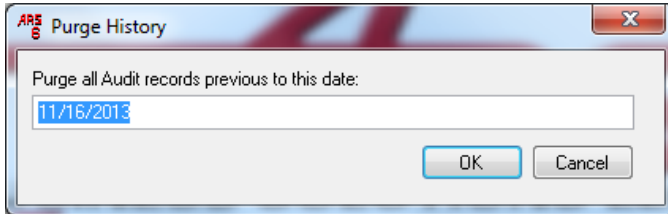
1. Schedule a day/time to execute the purge(s). Some purges may take a while to run, so it is helpful to plan to run them when the system is not occupied with EOY procedures or other processes.
2. [Manually Back Up the System](#) before completing the remainder of this procedure. (Once a purge is performed, purged information cannot be retrieved.)
3. Click the **Resets** button in the menu bar to display a drop-down menu of options.



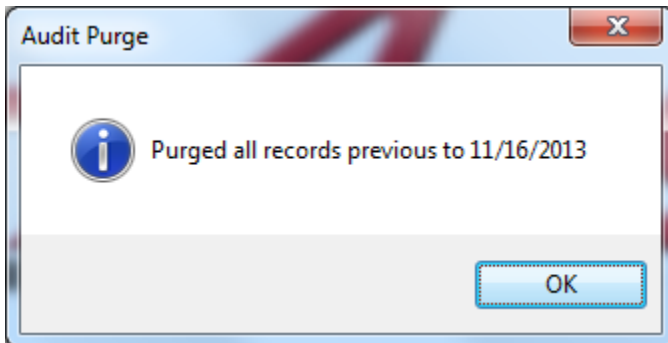
4. Click one of the following recommended purge options to display its Purge History window.
 - **Audit Purge**
 - **EventLog Purge**
 - **Tran Log Purge**
 - **GL Posting History Purge**

- **GL Transaction Purge**

► The window provides a default date. If needed, an earlier date may be entered.



5. Click the **OK** button to execute the purge and display a confirmation window.



6. Click the **OK** button to close the window.
7. Repeat the procedure as needed to execute all recommended purges.

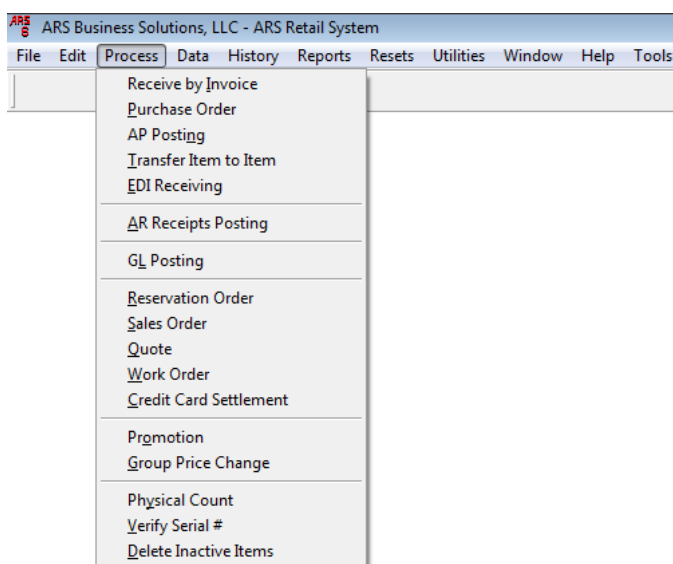
Delete Inactive Items

Inactive items (items that have not had any activity in over a year) can be identified and deleted with the **Delete Inactive Items** function. This function is available only if the system has been installed for more than a year.

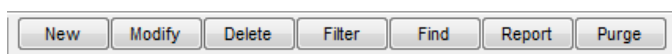
Complete the following procedure to identify inactive items, delete them, and update the POS:

► For questions regarding this feature, please contact the RTG Support Line at 1-800-547-7120 or Support@RTGHoldings.com.

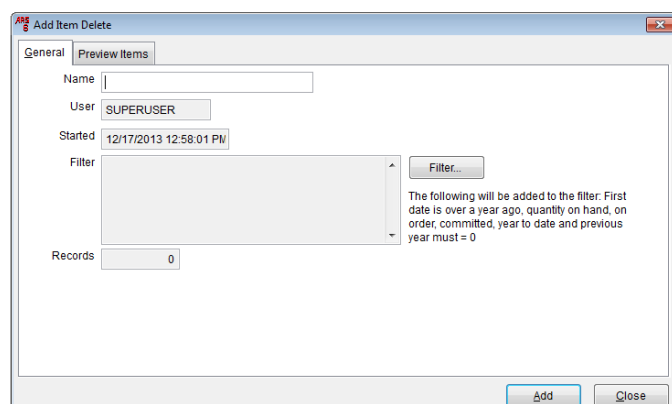
1. [Manually Back Up the System](#) before completing the remainder of this procedure.
2. Click the **Process** button in the menu bar to display a drop-down menu of options.



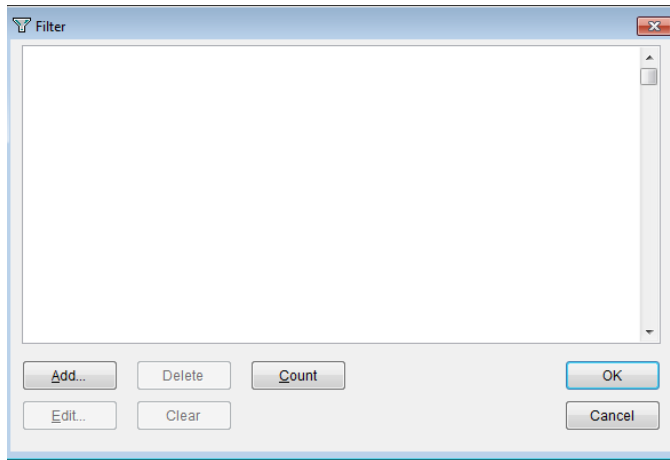
3. Click the **Delete Inactive Items** option in the drop-down menu to display the **Inactive Item Delete** window and a toolbar near the top of the screen.



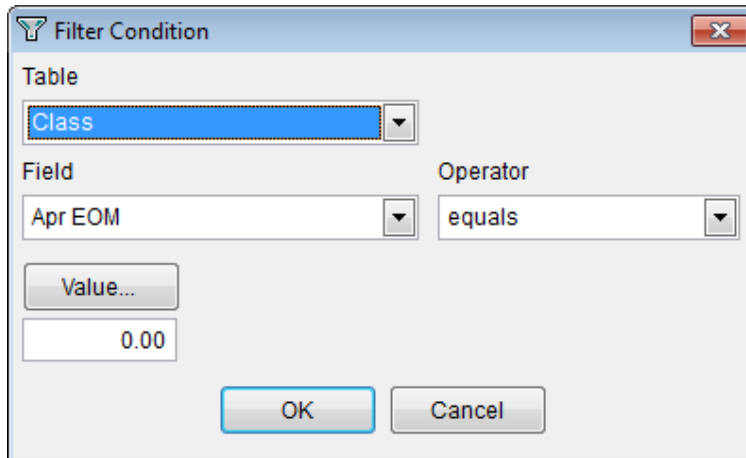
4. Click the **New** button in the toolbar to display the **Add Item Delete** window.



5. Enter a name (e.g., today's date) in the **Name** field.
6. Click the **Filter** button to display the **Filter** window.



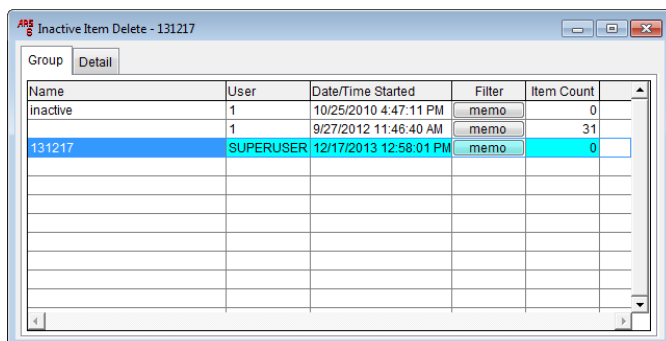
7. Click the **Add** button to display the **Filter Condition** window.



8. Select "Item" from the **Table** drop-down field.
9. Select "Class" from the **Field** drop-down field.
10. Select "is not blank" from the **Operator** drop-down field.
11. Click the **OK** button to close the **Filter Condition** window.
12. Click the **OK** button to close the **Filter** window.
13. Click the **Add** button in the toolbar to display a progress bar.

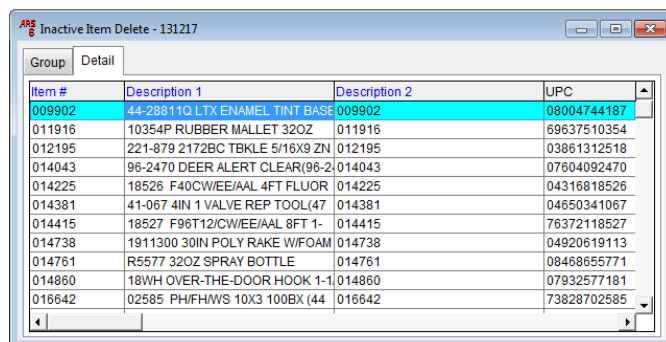
► The system checks for items that have not had any activity in over a year and groups them together under the entered **Name**.

14. When the process completes, the newly created group appears in the **Inactive Item Delete** window.

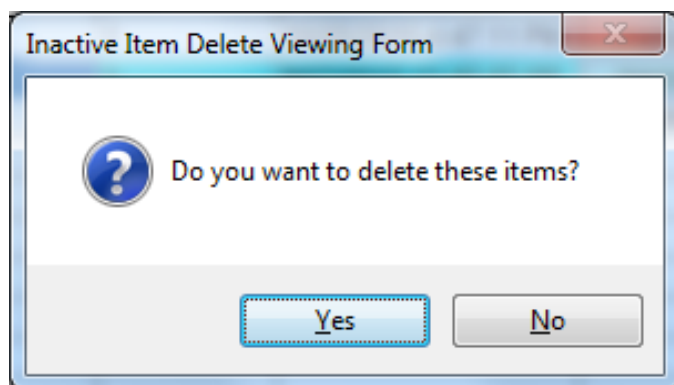


15. Click the group to select it and click the **Detail** tab to view a list of the group's items.

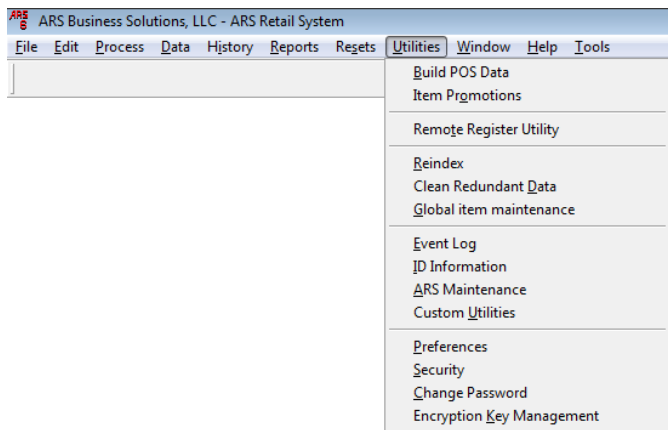
► When the group is purged, every item in it will be purged as well. If an item is to be retained, remove it from the list before the purge.



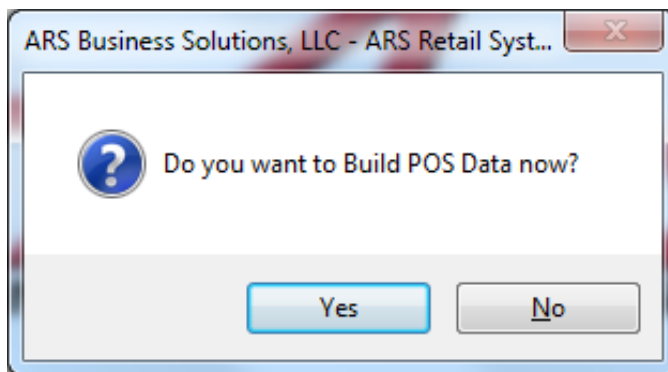
16. If needed, complete the following procedure to remove an item from the group:
 1. Click the item to select it.
 2. Click the **Delete** button in the toolbar.
 3. Repeat steps as needed to remove additional items from the group.
17. Click the **Report** button to run a report of the items that will be removed.
18. Print the report and save it as an electronic (e.g., PDF) file for future reference.
19. Click the **Purge** button to display a confirmation window.



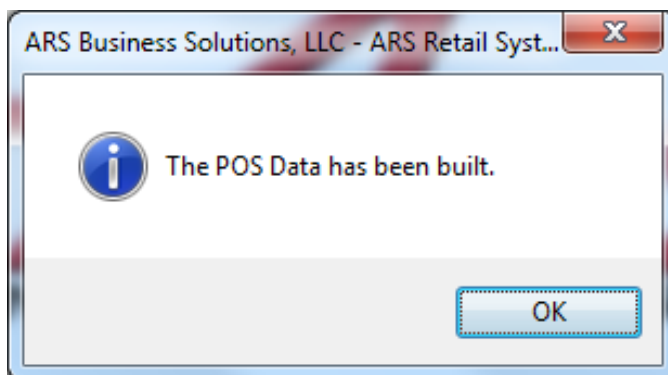
20. Click the **Yes** button to close the window and remove the items from the table.
21. Click the **Close** (red X) button on the **Inactive Item Delete** window to close it.
22. Click the **Utilities** button in the menu bar to display a drop-down menu of options.



23. Click the **Build POS Data** option in the drop-down menu to display a confirmation window.



24. Click the **Yes** button to display another confirmation window.



25. Click the **OK** button to close the window.
26. Complete the download procedure at every register to remove the items from the POS.