

Company Data Archive Release Notes

Release: 25.1.5

Versions:
GP 2018

Release Details

Version Details

Development Tool	Dexterity
SQL	SQL Server 2014 SQL Server 2016 SQL Server 2017 SQL Server 2019 SQL Server 2022
Dynamics GP Version	18.8.1904
Product ID	1157
Product Version	18.0.665
Main Dictionary	COARCHIVE.DIC
Reports Dictionary	R1755.DIC
Forms Dictionary	F1755.DIC

New in this release:

ID Number	Description
25.1.5	
51447 Bug	Fixed: Archive Attached Documents export from LIVE company produces blank report and creates no files in the export folder. The utility now successfully exports all selected attached documents (including record notes).
25.1.4	
5305 Enhancement	<p>Archiving Document Attach Files This update adds full support for archiving files managed through Dynamics GP Document Attachment.</p> <p>Key Benefits</p> <p>Properly archives scanned documents and notes that were previously left behind because tables CO00104, CO00105, and COAttachments are intentionally excluded from standard CDA processing.</p> <p>Ensures the archive company contains all relevant attachments (both master-data and transactional) after archiving is complete. Provides safe export/import of the actual file content while maintaining correct links via GUID and BusObjKey.</p>
23.2	
14452 15702 Enhancement	<p>Additions to manual including:</p> <ul style="list-style-type: none"> ● recommendations maintaining master records. ● Clarification to archiving process to clearly define records that are removed and those that will remain within the production database
3638, 17671. 6821 Enhancement	Improvements made to granting necessary security to SQL objects during installation.
23.1.1	
19178 Enhancement	Expand Additional Products scrolling window when Archive Setup window is made larger.
23.1	
7160 Enhancement	Add option to quit showing warning dialog about registration keys have expired.
14735 Enhancement	Expand Schedule Archive to allow for setting Pause and Resume times per day of the week.
20.2	

3052 Enhancement	Created the Pre and Post Archive Tasks window. This window allows users to identify, run, and review tasks/reports associated with the specific modules to be archived quickly and easily. As well, the cutoff date to be used for the next archive can be specified to restrict the reports generated appropriately.
1321 Enhancement	MDA data is now treated as transactional and is both transferred and removed from the production company along with associated transactions.
1321 Enhancement	Added the ability to create a note detailing any pertinent information regarding an archive from within the Company Data Archive window. Notes can be viewed within the Archive activity log window.
20.1	
3310 Enhancement	Created a cross company SOP inquiry window, similar to the RM/PM CDA inquiry windows. This will allow users to view SOP documents that are found within the Archive company from live.
3068 Enhancement	Included steps to complete a Backup/Restore from within Dynamics GP within the CDA manual.
19.3	
2648 Enhancement	CDA Plus add-in allows archival of Collections Management data.
3154 Enhancement	Added the ability to select multiple companies within the CDA RM Transaction Inquiry window.
3155 Enhancement	Added the ability to include/exclude weekends from the scheduled archive Pause/Resume functionality.

Service Requests resolved in this release:

ID Number	Description
25.1.3	
44318 Bug	Error Invalid column name TRXDATE when running payable transaction archive process
25.1	
23551/21531 Bug	Resolved an issue in which DTA records attempted to import multiple times resulting in duplicate key errors if block size functionality is utilized.
26424 Bug	Resolved error encountered when using the Process button within the Archive Schedule Maintenance window
23.2.1	
23728 Bug	Resolved errors encountered when completing installation 'Cannot find object 'paXXXXX', because it does not exist or you do not have permission.'
23.2	
19410, 19421 Bug	Resolved issue resulting in third party products only showing one row within the archive preview window. Updated ISV API document to reflect necessary update.
16036 Bug	Enter cut off date in the future does not give warning message about The Cut off date needs to be more than X years prior to today.
5382 Bug	Possible error encountered when transferring SOP 'The multi-part identifier "pm.DTASERIES" could not be bound. Column name or number of supplied values does not match table definition'
23.1.3	
16036 Bug	Enter cutoff date in the future does not give warning message about the cutoff date needing to be more than X years prior to today.
19410 Bug	Additional Products on Preview window not displaying proper values for the number of rows. First result repeated in window.
20.2	
4111 Bug	A message appears when removing SOP and RM with CDA Plus and a customer is not included, "Stored procedure CDA_Fill_Customers, Pass Through SQL returned the following results: DBMS 102, Dynamics GP:"
3537 Bug	If using Microsoft Office 2016, the following error is encountered when exporting the CDA Data Distribution and Sizes report to Excel: Unhandled Object Exception: Member Not found and Exception Class Object Exception: Exception Subclass

20.1	
948 Bug	Will It Archive Report prints no detailed information for any transactions in PM.
19.3	
3156 Bug	Disabled the ability to schedule an archive if the block size set in the CDA Registration window is set to zero.

Installation and Setup

What you require before you can install the new code:

- CM and CDA 2018 Setup.exe Installer file
- Installation instructions
- Access to Server or computers that need installation

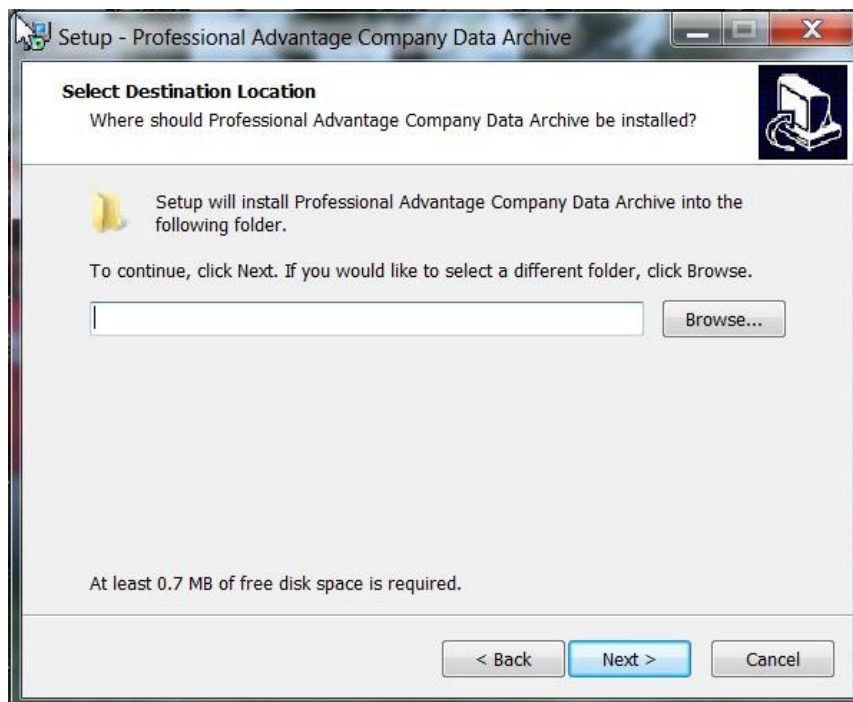
Prior to the installation, ensure a recent backup of the relevant Dynamics GP databases has been performed.

Follow the installation instructions below:

To install Company Data Archive, run the CM and CDA Setup Application file provided to you. To ensure you have the proper permissions to run this file, log in as a local Administrator. Also, be sure to right-click the application file and select "Run as administrator." Click Next to begin the installation. Carefully read the End-User License Agreement. Accept the agreement and

Click Next. Enter the location of the GP folder you would like to install CDA into or click "Browse..." to navigate to your GP folder. Click Next. To install the latest code and documentation files, make sure you mark all three of the available components for Company Data Archive. Click Next. Click Install.

All of the necessary files will be installed within the GP folder you selected. The code (.cnk file) and Online Help (.chm file) will be installed in your root GP folder. The CDAPROCS.idx and CDAPROCS.dat stored procedure files will be installed in the Data folder within the GP folder. The PADBSizing Excel Template will also be installed in this Data folder. The CDA Release Notes, CDA Manual, and CDA Best Practices PDF files will be installed into the Documentation folder. A Microsoft_DynamicsGP_Performance_WhitePaper PDF file will also be installed into the Documentation folder.



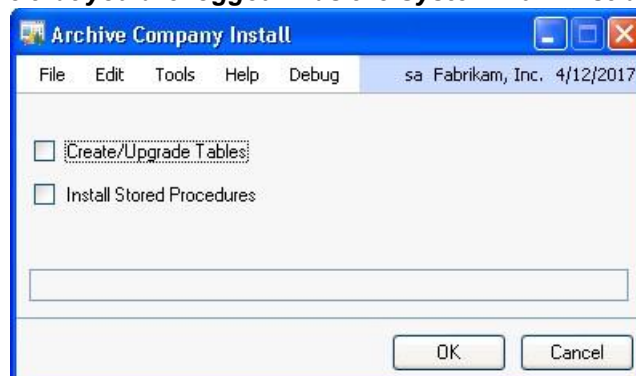
To include the new code, launch Microsoft Dynamics GP by right-clicking your GP icon and choosing 'Run as Administrator.' Depending on your version of Windows, and how User Account Control has been set up, you may need to log out of Windows, and log back in with an account that has local administrator permissions. Select "Yes" when asked if you would like to include the new code.

NOTE: After the program is installed, you can view the specific build number currently installed, as well as other general information about CDA, by opening the PA-Archive About Box window. (Tools>>Utilities>>System>>Company Data Archive About)

SQL Archive Company Install

Tools >> Utilities >> System >> Company Data Archive Install

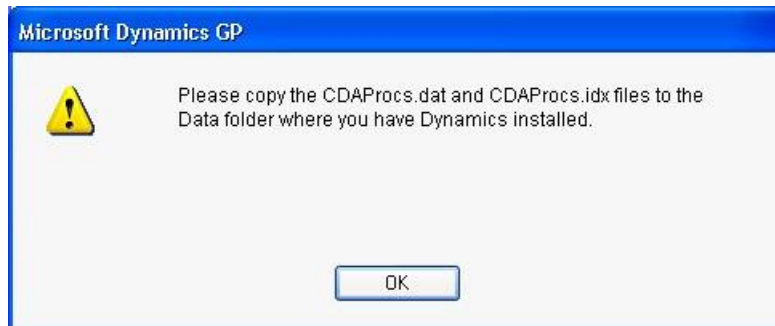
Make sure that you are logged in as the System Administrator 'sa'.



Mark both 'Create/Upgrade Tables' and 'Install Stored Procedures,' and click OK. The install process will ensure the proper rights are given to the new tables and procedures used by the company data archive process.

The two files which contain the stored procedures for installation into the Microsoft Business Solutions Great Plains directory must be present in the Data folder to install the stored procedures.

****If the Stored Procedures are not copied into the directory or are marked as 'READ ONLY', you will receive the following message.**



Additional workstation installation instructions:

- Run the installer on each additional workstation that will be using CDA.
- Launch GP and choose "Yes" when asked if you want to include new code.

Important Note:

With each annual enhancement you purchase, you will be given a registration key allowing you to continue to download and install new CDA code. Once the expiration date passes, you will receive a warning message stating that in order to install and run new CDA code you need to contact Professional Advantage to renew your enhancement. After your keys expire, you will still be allowed to archive using your current code. You will not be able to install new stored procedures for CDA. If you do not want to renew your annual enhancement, **DO NOT INSTALL VERSIONS OF CODE THAT HAVE BEEN RELEASED AFTER YOUR KEYS HAVE EXPIRED.** Doing so will cause CDA to stop working, and unless you have a copy of the code you used before your keys expired, you will not be able to revert to a working version of CDA.



Let's Talk

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About Us

Professional Advantage was established in 1989 in Sydney Australia and has grown rapidly over the years across the globe. We currently have 7 offices that range world-wide, and established a North American presence in 1996, including two branches here in the US (Denver & Fargo).

Professional Advantage has been a Microsoft Presidents Club Member and Certified Partner for several years, providing offerings and products in for the Dynamic GP, Dynamics 365 Business Central and Dynamics 365/CRM space. With 6,000 customers globally, the focus has always been helping clients use the technology to make a difference and enable high performing workplaces.

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