COMPANY DATA ARCHIVE

FAQs

Content Guide

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Support and Registration

1. Where do I go for Support?

Answer: PA will provide email and phone support to Partners in accordance with the following support policies:

Hours of Operation

8:30 am – 5:00 pm Central Time Monday through Friday excluding holidays

Methods of Contact

Partners can log a support request by calling our Help Desk team at 701.235.2363 ext 3 or email a request to partnersupport@profad.com.

Before contacting PA, Partner should collect as much of the following information as possible and have it readily available during the call:

- Product version
- Complete problem description
- Description of steps already taken to resolve the problem

Partner support does not include direct support to End Users. On occasion, certain support issues require the PA representative to be in direct contact with the end user.

In those cases, Partner shall remain the primary contact for the customer and participate in the troubleshooting and resolution process. This is a valuable way to actively transfer knowledge.

2. Where do I go to get a new registration key?

Answer: Provided the AEP fees have been paid prior to the due date and the client install has a working internet connection, CDA installs will automatically update the registration key. This PA blog covers the process in detail: Read more >>

Users can also navigate to the PA-Archive Registration Window (Tools > Utilities > System >

Company Data Archive Registration) and click "Get Registration Info".

- Alternatively, users can generate a registration key from our website.
- If the methods outlined above fail, contact renewals@profad.com.

3. Where do I apply my registration key?

Answer: You will enter the Company Data Archive registration key from within Dynamics GP:

- Tools > Utilities > System > Company Data Archive Registration
- Enter the Registration Key and Expiration Date, then click Tab on your key board. Alternatively, you can click "OK" in the top-left hand corner of the registration window to register the keys.

4. Why am I receiving a "my registration keys are expired" error?

Answer: Company Data Archive comes with a yearly enhancement plan to bring you the latest fixes and new functionality. If you have not renewed your keys after the annual date, you will receive this message. You can continue to use Company Data Archive, but unless ignored, you will receive this message each time you open a CDA window.

To resolve, contact your partner/VAR for new keys.

5. Why don't I see the install and setup window?

Answer: You must be logged into the company as the 'sa' user.

Install and Setup

6. Do all users need to be out of GP when installing Company Data Archive?

Answer: This is recommended, but not required.

7. Where should I install CDA?

Answer: You only need to install Company Data Archive on the SQL server. In cases where other Microsoft Dynamics GP users need access to CDA inquiry windows that allow them to view transactions from the live and archive company on a single window, you would only need to install CDA on those individual workstations.

8. Do I need to install Company Data Archive on all work stations?

Answer: No, only install Company Data Archive on work stations where users need access to the CDA Cross Company Inquire windows.

9. Does CDA automatically set up the archive company?

Answer: No, the customer creates the archive company using the standard DynUtils process. The steps to this process are documented in the CDA manual (should take about five minutes to complete). This ensures your company structure is set up exactly as required by Microsoft.

10. Do I need to setup Company Data Archive in all companies in GP?

Answer: Only the production company(s) you are archiving from and the corresponding archive company(s).

Functionality and Security

11. Where can I find the Company Data Archive user manual?

Answer: The user manual is located in the software download file, the GP\Documentation Folder. Alternatively press F1 in CDA to open a help file.

12. Where is Company Data Archive located in Dynamics GP?

Answer: The Company Data Archive functions are found under the "Administration" pane in Dynamics GP. (Example: Tools > Utilities > System > Company Data Archive)

13. What version of Dynamics GP does Company Data Archive work with?

Answer: Company Data Archive is typically supported and enhancement for the 2 most recent Dynamics GP builds (Ex: GP2015 and GP2013). However, Professional Advantage does keep older code for purchase. Contact Professional Advantage for compatibility and version details: profad@profad.com.

14. How do I know I am running the latest version?

Answer: Go to Tools > Utilities > System > Company Data Archive About. The current version number is located in middle right side of the window. You can cross reference this by downloading the latest code and documentation from the PA website.

15. What does Company Data Archive do?

Answer: Company Data Archive allows users to move historical information from a live/production company to an archive company. It allows you to select which modules to archive and their cutoff dates. The archive company is another regular company in Dynamics GP using the same dynamics utilities. You have the same functionality as your production company including report generation, inquiry windows, SmartLists, etc.

16. What modules does Company Data Archive move data from?

Answer: Company Data Archive (Professional/Standard version) will archive data from GL, PM, RM, BankRec, IV, SOP, POP, IVC, UPR, BOM.

17. Does CDA archive custom or third party tables?

Answer: CDA Professional only supports core Microsoft Dynamics GP modules, but can copy across tables you define using their specific names or a wildcard (GL*) as a part of the master data transfer. You can enter the SQL table name to copy over any custom, 3rd party, or nonstandard GP tables. Removal of data from these tables in the live company must be done with another process. For "completely archiving" third party or customer tables, look at the CDA Product page to [learn more about CDA Plus](#).

18. Why don't I see any change in the file size or the original data file after archiving data?

Answer: SQL removes the data from the database file, but doesn't release the disk space until the user shrinks the database. Since it's the live database, CDA doesn't do this as part of the archive process as it needs control of the whole database while it is doing it. Users want some free space left and even when you shrink the database, SQL will leave a percentage (user can pick). Users who have done a recent backup can see a reduction in size of the log file, which contains transactions since the last backup, but again, this doesn't shrink unless the user processes it. Users can do this in SQL Management Studio by pointing to the database, right click, select Tasks, and then shrink. SQL Management Studio will step you through the rest of the process.

19. What security does a user need to have to access the archive company?

Answer: The Archive Company uses the standard GP security model. Users can be setup with or without access to the archive company by the System Administrator. During setup, you can restrict access to the historical company's module transaction entry windows to prevent users from entering new transactions. (Tools > Setup > System > User Security)

20. What security does a user need to have to perform an archive?

Answer: User must have System Administrator ("sa") or dyn-sa rights to perform an archive.

Pricing/General/Miscellaneous

21. What is the pricing structure for CDA?

A: The Company Data Archive pricing model is based on the number of registered Microsoft Dynamics GP users. Please contact Professional Advantage for a price quote: profad@profad.com.

22. Do you have to purchase more GP licenses to set up and use the archive company?

Answer: No. Although GP counts employees across all companies, CDA is set up so the archive company employees are not counted.

23. What is CDA Express?

Answer: Company Data Archive (CDA) Express is a bundled module with Professional

Advantage's Collections Management product. Users can select a cut-off date and archive General Ledger (GL) and Payables Management (PM) module data.

CDA Express is not sold separately, and available to all Collections Management users who are current on their PA Annual Enhancement Plan (AEP).

24. What is CDA Professional?

Answer: Company Data Archive (CDA) Professional is also known as "CDA Pro" or simply "Company Data Archive". This is the standard version of our archive tool that allows users to archive data from the core Dynamics GP modules.

25. What is CDA Plus?

Answer: Company Data Archive Plus (CDA +) is an extended version of Company Data Archive Professional. CDA + provides customers a means to archive third-party modules beyond core Microsoft Dynamics® GP. With an application programming interface (API), CDA + allows customers (or partners) to develop add-ins, using the existing CDA logic, to archive additional transaction related data for your custom solution that is stored in the Dynamics GP database. Learn More >>

26. Why is Company Data Archive good for my Microsoft Dynamics GP database?

Answer: CDA reduces clutter in your inquiries and reports allowing you to make faster decisions. It increases performance in lookups, reports, and inquiry windows. It allows for faster GP upgrades. Also, with reducing the size of your live database, it allows for quicker backup and restore processes. This gives you the opportunity to run your live GP database on your high performance hardware while running your archived data on less expensive, less optimal hardware.

27. Why wouldn't I just take a backup of my database and then run remove history in my production database? Isn't this the same as archiving?

Answer: First, taking a backup of your database will double the disk space needed to store this information. With twice the data, if you run remove history in your live company to take out roughly half of that data, you are still left with 1.5 times more data than when you started.

Second, when it comes to doing this process again you are stuck with 3 databases for one company (and another new database every time you do it) and even more data scattered between all of them.

CDA allows you to remove data from your live company by date without creating unnecessary duplicate data and without breaking important document apply chains. CDA also allows you to archive multiple times into the same archive company database, so you don't have to create a new one every time you archive. Reporting is easier with CDA. You can utilize cross company inquiries to quickly locate documents in the live and archive company from the same window and you will not run into problems with duplicate documents.

28. How long will it take to archive my data?

Answer: There is not an accurate way to estimate how long the archive is going to take due to variables that impact performance. A way to benchmark performance is to see how many customers have documents in the date range. The number of customers/time you calculate is a very rough estimate. For example: if you have 1000 customers for the range of dates, the first 100 may take 10 seconds, but the last 500 could have 10x as many transactions as the first 100, so your estimate will be low. We recommend adding an additional 10-15% buffer to the archive time estimate you calculate. Read more about reducing archive time by up to 90%

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 both the Dynamic GP and 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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