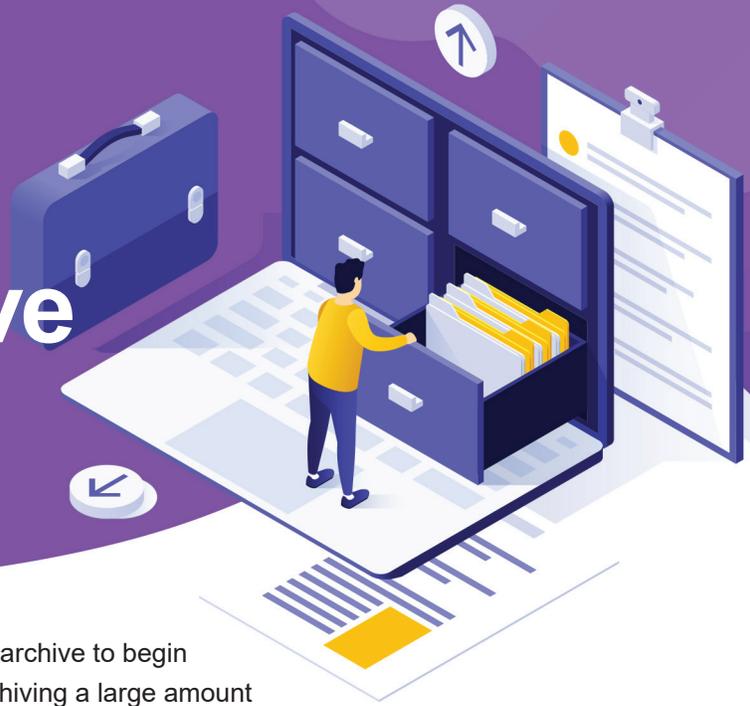


# Company Archive Scheduler



With the Scheduler functionality, you will be able to queue an archive to begin and pause at specific times Mon-Sun. This is useful when archiving a large amount of data that would not complete prior to users entering the system.

Specifically, this process leverages the Pause/Resume functionality when archiving Customer/Vendor information within GP. The Scheduler window allows setting a fixed cutoff date or configuring a rolling 'Years To Keep' which will prompt that an archive is due based on the Day of the Month specified in the Scheduler window.

Company Archive Scheduler - ARCH (sa)

OK Cancel File Tools Help

Destination Company: TWD Archive Company  
Originating Company: Fabrikam, Inc.

Scheduled Archiving:  Disabled  Enabled

Archive Type:  
 Fixed Cut Off Date: 0/0/0000  
 Rolling Years To Keep: 3 On 1 Day of the Month

Document Date  GL Posting Date

Print Detailed Reports:

Reports Folder: C:\Users\griffins\Documents\Archive Reports\

Modules	Transfer	Remove
Payables Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Purchase Order Processing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Receivables Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoicing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Order Processing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Resume Archive: Mon-Fri 6:00:00 PM  
Pause Archive: 7:00:00 AM

Same For Sat/Sun

Queue Archive

**First**, ensure that the Destination Company displayed is your archive database. Set the Originating Company to the company that contains the data you would like to archive. Once an Originating Company is set the lookup will be disabled. This is designed to ensure that the archive company is paired with the originating company.

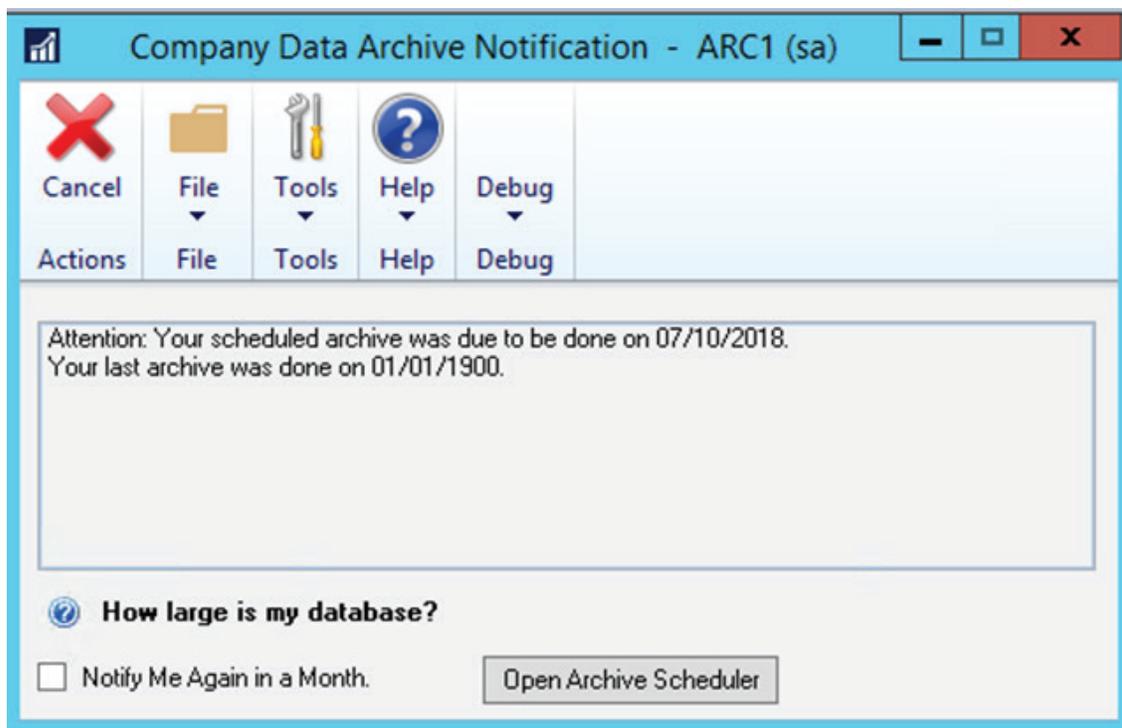
Prior to completing any scheduled archives, ensure that the Transfer Master Data archive process is completed within the archive company. This should also be completed prior to subsequent archives if changes/additions have been made to master records since the previous archive.

The Scheduled Archiving radio buttons (Disabled and Enabled) can be used to disable the functionality if necessary. This could be to prevent the notification of a rolling archive during a maintenance period.

### The following Archive Types are available:

**Fixed:** This allows for a specific Cut Off Date to be set. Once the archive has been queued with all necessary options selected, the archive will start using the Cut Off Date specified.

**Rolling:** This allows for a Years To Keep and Day of the Month to be specified. The Cut Off Date for the archive will be X years prior to today's date when the archive is completed. The Day of the Month specified will indicate when users will be prompted to run the archive. Users that are assigned the 'POWERUSER' security role will encounter a prompt in both the Destination and Originating Company from the Day of the Month and seven days following. The prompt will not occur if an archive has been completed in the current month.



Note: The archive prompt will not include the 'Open Archive Scheduler' button and will include the message 'Please log into the 'Archive Company Name' company and do an archive', if logging into the originating company.

The Document Date and GL Posting Date radio buttons are used to specify the method used to determine the documents to archive. The table depicting what these options mean by module can be found in Appendix B of this manual.

The checkbox next to Print Detailed Reports allows the user to specify if the reports will be printed when the archive is completed. The Reports Folder specified will be the location used to deploy the reports if the checkbox is marked. The user logged into GP when queuing the archive will need to have Read/Write and Modify permissions to the folder location specified.

The Modules available to Transfer and Remove are based on all modules in which the Pause/Resume functionality apply.

The Resume and Pause Archive fields are used to specify the time the archive will start and pause. For example, if 8:00 PM is specified as the Resume and 6:00 AM is set for Pause, the archive will begin at 8:00 PM and a pause will be initiated at 6:00 AM if the archive has not completed yet.

When clicking Queue Archive, the user will receive a notification the archive has been scheduled for the Resume time specified, today. This requires that the current GP session remain open during the archive. As well, it is recommended that the user initiating the archive be the 'sa' user or a user with sysadmin permissions within SQL.

Note: It is recommended that all Pre-Archive tasks detailed in Chapter 3 are completed prior to queuing an archive. As well, a backup of both the archive and originating database should be taken prior to starting an archive. If any errors are encountered during an archive, the following actions should be taken:

1. If only Transfer was selected, restore the archive database prior to the failed archive.
2. If both Transfer and Remove are selected, restore both archive and originating database prior to the failed archive

Once the steps above are taken, the underlying cause of the error encountered needs to be resolved prior to attempting another archive.

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**The following scenario details the recommended steps when configuring and completing a scheduled archive:**

1. When initially considering a scheduled archive ensure that an archive database is created within GP Utilities. If you require archiving multiple GP companies, a separate archive database will be required for each GP database that will be archived.
2. Once the database is created, you will need to complete the 'Transfer Master Data' archive prior to the first scheduled archive. This will copy all master data from the originating database into your archive database.
3. It is then recommended to complete all Pre-Archive steps detailed within Chapter 3 of this manual. Check Links would not be required again until you are planning to archive data that did not exist when completing the initial Check Links process. However, all other recommendations would apply each time a scheduled archive is initiated.
4. If the archive process is known to take a considerable time in your environment, the process can be completed on a dedicated machine logged into the archive company within GP. The following considerations should be made on that machine:
  - a. Ensure that the user logged into GP on the machine is either the 'sa' user or a user with sysadmin permissions in SQL.
  - b. Ensure that the machine is configured not to enter sleep mode so GP is available when resuming and pausing the archive.
  - c. If a SQL disconnect is encountered, ensure that GP is closed and a new session is started.
  - d. As is indicated above, if any errors are encountered during an archive, it is recommended to restore the appropriate databases following a failed archive
5. Once the machine is configured and all necessary reports are generated from the Pre-Archive steps, the user can click on the Queue Archive button within the Scheduler window. This will create a timed event to begin the archive at the time specified as Resume.
6. Finally, after the archive is completed all detailed reports can be accessed at the path configured in the Scheduler setup window. These can help to validate the data that has archive.

## Let's Talk

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