

Ignify Data Archival

for



Supercharge
performance of
your Microsoft
Dynamics ERP

Frequently Asked Questions

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Ignify

USA: Los Angeles. Silicon Valley. Seattle. Nashville.
International: Toronto. Pune. Bangalore

Providing:
Purge, Archive and Data
Management capabilities
for Microsoft
Dynamics™ AX

Environment, Database and Version Supported

1. What versions of Dynamics AX do you support?
Microsoft Axapta 3.0 Service Pack 3 and above, Dynamics AX 4.0 base and with all service packs are supported by the Data Archival for Dynamics Application. Data Archival for Dynamics is part of the Metro program for Early adopter ISV and we are in the process of getting Data Archival certified for Dynamics AX 2009.
2. What databases does the Data Archival tool work on?
The Data Archival tool can work with a Dynamics AX environment running on
Microsoft: SQL Server 2000, SQL Server 2005
Oracle: Oracle 9i, Oracle 10g and above
We are conducting compatibility tests with SQL Server 2008 and expect to support that
3. What size database can you work on?
There are no restrictions on database size imposed by the applications. We have tested Data Archival for Dynamics on databases ranging from 50 GB to 5 Terabyte and have seen successful performance

Features and Functionality

4. Can you archive by time period?
Yes, time period is one of the criteria, provided for selection by the user, for each entity that undergoes the Data Archival or purge processes.
5. Can I select what records should be archived / purged?
Yes, the Data Archival application provides the user a predefined set of rules and criteria for each entity. By setting the values for these rules and criteria, it is possible to control / determine what records should be archived / purged.
6. Can I purge some records and archive others?
Yes the ability to set rules is provided at the level of an entity. Entities are transaction concepts like Sales Orders, Purchase Orders, Production Orders, and Sales Quotes. For example you can archive sales orders but choose to purge sales quotes
7. Can I have different rules by company?
Yes, the ability to determine whether to purge or archive data is provided by Company and Entity. Thus, it is possible to configure records for an entity that are associated some companies to be archived and some to be purged. For example, you can choose that for company A you will archive all closed sales orders and purge all sales quotes before December 31st, 2007 but in

company B you may chose to purge both closed sales orders and sales quotes before December 31st 2006 while archiving both sales orders and sales quotes between the period January 1st, 2007 to December 31st, 2007.

8. How can I view my archived records?

The default setting for the rules are such that when an entity is archived, its sub-entities are also archived. The archived data is stored in another database that is similar in structure to the source AX database. It is possible to access this archive data by configuring Microsoft Dynamics AX application to connect to this Archive database and viewing the data that has been archived.

9. Can the Data Archival product also be used as a cleanup tool?

Yes, the Data Archival product has a purge feature which can be used for data cleanup.

10. Can I archive just about anything?

Most data except non-transactional master data would fall under a business entity. The Data Archival tool caters to the archival / purging of these business entities. List of standard entities supported by Data Archival are listed below. However the extensibility module allows you to add custom entities or any other entities that you wish to add.

- Sales Orders
- Customer Invoice
- SO Picking List
- SO Packing Slip
- Customer Payment Journals
- Purchase Orders
- PO Picking List
- PO Packing Slip
- Vendor Payment Journals
- Inventory Journals
 - Movement Journals
 - Profit/Loss Journals
 - Transfer Journals
 - BOM Journals
 - Counting Journals
 - Tag Counting Journals
- Sales Quotations
- Purchase Quotations
- Customer Payments
- Vendor Payments
- Depreciation Journals
- CRM Activities
- General Ledger Transactions

You can also choose to archive an entire company over a date range. This would archive all the transactional data in the company over the date range selected.

11. How long does it take to archive records?

The time taken by the archival process is dependent on the server hardware, number of entities being archived and the volume of records for the entities being archived. In general your periodic archival will be done in less than 2 hours*. For your first archival run a longer time window may be required. For shorter archival time, it is recommended that the Data Archival be run more frequently to reduce the number records to be archived.

* Estimated based on a database size of 200 GB

12. If I archive Sales orders what happens to the invoices?

The Data Archival tool provides the ability to purge / archive data by entity. If an entity like Sales Order is being archived, dependent entities like Customer invoice and Packing List can also be archived along with the primary entity (Sales Order).

13. How do you ensure that data integrity is not violated?

The Data Archival tool provides for the ability to purge / archive data by entity. All logical relations between tables that belong to the entity have been taken into consideration in designing the tool. This ensures that orphan records are not left in your database. For example, when you archive sales orders Data Archival for Dynamics will also archive the Sales invoice, Payment Journal(s) related to the sales order, inventory transactions and other related entities. While the default settings provides the initial recommendation to what should get archived, you can control which related entities get archived or purged and which do not. For details, please refer to [Example of how Ignify Data archival maintains transactional Integrity](#)

14. Does the Data Archival application track the instances of the entities being archived / purged?

Yes, the Data Archival product maintains the primary identifying attributes of the entity being archived / purged. For example, for Sales Orders, it maintains track of the Company (DataAreaId) and the SalesId of the Sales Orders that were identified for archival / purge

15. Do I need to take my AX system offline while doing data archival?

The AX system need not be taken offline during archival. However it is recommended that Data Archival is accomplished during a maintenance window so that records that are being archived are not modified by users in the system. This maintenance window can be easily predicted by running the archival process in a test environment.

16. Can Data Archival be run on a schedule?

Yes, the Data Archival product has a feature that enables setting archival or purge of entities on a schedule. You can set this to run daily, weekly, monthly, quarterly or on an annual basis.

17. How is scheduling implemented by Data Archival?

Data Archival uses Windows Task Scheduler for scheduling. Archival / purge that are scheduled used the Data Archival application result in the creation of a Scheduled Task for Windows Task Scheduler.

Technology

18. What are the various components of the Data Archival application?

The Data Archival application consists of an executable file for the user interface, a SQL database / oracle schema, called the Monitor database / schema, to store

- a) metadata
- b) metadata and history of the key values of data that was identified for archival / purge
- c) stored procedures invoked during the execution of the archival / purge process

19. What is the language for used for developing the Data Archival user Interface?

The Data Archival application is a .Net application developed using C#. The archival scripts are SQL Stored procedures.

20. Are there any limitations regarding co-location of the source AX database / schema (for oracle) and the monitor database / schema of the Data Archival product?

It is recommended that the Source AX database and the monitor exist on the same SQL Server / Oracle database instance in order to avoid linked servers (SQL Server) / db links (Oracle) and their corresponding performance impact. However, this is a recommendation and not a limitation of the application. The archived database is typically on a separate server.