Archiving Your Accounting Database (Access database users only)

Are you finding that your accounting database is processing more slowly even though you have been compacting and repairing it daily? Are reports taking more than just a minute or two to appear on the screen? Do you have more than the last two fiscal years' information in the database? You may need to "archive" your database.

"Archive" is a process in which the software will remove old records from the database based upon the cutoff date you select. After archiving, the software will not need to sort through old information to prepare current reports, thus speeding up the processing time. Additionally, archiving will be required in order to transition to our new accounting software which will begin being released this fall.

You may feel apprehensive to archive because you may need to access the older information in the future. However, don't worry. All information may still be accessed. By following the "Saving a Copy of Your Final Year End Database" instructions listed in the below article (also available in the Help Manual under General Ledger/Year End), you will still be able to log into the old fiscal year database where all of the old information will still reside. This will allow you to access the old copy of the database to look up old information, as the archive process will only affect the current database you are using.

The archiving process allows you to select which records will be archived and the cutoff date that will be used. Only two or more fiscal years before your current fiscal year are available to be archived. Your archiving selections are:

◊ **Monthly Processing:** records will be deleted from the tables used for the General Ledger, Prior Year budgets and amounts, journal entries, accounts receivable and cash receipt batches, cost allocation, timesheets, and expense reimbursements.

◊ **Payroll and 1099 Information:** records will be deleted from the tables used for voucher and cash disbursement batches, prior year payroll, retirement, workers comp and weeks worked.

◊ **Inactive General Ledger/Element Codes:** inactive general ledger codes will be deleted provided they are not set up in Fixed Assets and are not code 50000. General ledger codes or elements that still exist in tables after the cut-off date that relate to General Ledger, Cost Allocation, Budgets/Prior Year or Class setup will not be deleted.

◊ **Inactive Vendors:** Inactive vendors will be deleted if they have no existing vouchers associated with them.

◊ **Terminated Employees:** terminated employees that were not paid in the current year will be deleted from tables related to employee files, timesheets, worker's comp, retirement, payroll adjustments, prior year state tax analysis and payroll information, weeks worked, personnel history and prior year cost allocation.

◊ **Inactive Customers:** inactive customers will be deleted from tables related to customers, Accounts Receivable Invoices, and Cash Receipts.

◊ **Disposed Fixed Assets:** fixed asset that have been disposed will be deleted from tables related to inventory, location and depreciation history, and funding sources.

◊ **Completed Purchase Orders:** completed Purchase Orders will be deleted from the tables related to purchase orders.

For more information regarding the Archiving process, please consult your Help Manual under Tools/Archive Database. An excellent time to archive is at the start of each new fiscal year after you've made a backup of your database and rolled forward into the new year.