
MINIMIZING DISK SPACE USAGE IN SAAS OR VIRTUAL OFFICE CS

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In General

This document explains various ways to reduce the amount of disk space used by CS Professional Suite[®] applications and Microsoft[®] Outlook[®] when run through Software as a Service (SaaS) or Virtual Office CS.[®] You may occasionally need to perform these procedures to free up disk space.

Note: You cannot reduce the amount of disk space required to store client data in the following applications: Accounting CS,[™] Client Bookkeeping Solution,[®] Financial Analysis CS,[®] Planner CS,[®] and ToolBox CS.[®]

Creative Solutions Accounting

The following procedures will help reduce the amount of disk space used by Creative Solutions Accounting[™] (CSA) data. Many of these procedures involve removing unnecessary items. You might want to back up client data before performing these procedures.

Important!

- After deleting client data, you need to compact the client database. See page 3 for detailed information.
 - After deleting global data, you need to compact the global database. See page 3 for detailed information.
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Compress client data files

Enabling client data compression substantially decreases the amount of disk space required to store client data, but it also decreases the speed with which client data open and close. Because uncompressed client data files require an average of ten times more disk space than compressed files, we recommend that you compress the data files if disk space is a concern.

1. In Creative Solutions Accounting, choose Help > Repair.
2. In the Clients tab of the Repair dialog, mark the *Enable client data compression* checkbox.

3. Click Done.

Reduce the number of years of general ledger transactions and balances to save

If you are saving general ledger transactions and balances for more years than are required, you can conserve disk space by reducing the number of years to save. You must set the desired number of years on a client-by-client basis.

Important! If you reduce the number of years of general ledger transactions and balances that are saved for a client and transactions and balances exist beyond the number of years specified, those transactions and balances will be deleted.

1. In Creative Solutions Accounting, open the appropriate client database.
2. Choose File > Client Properties.
3. In the General Ledger tab of the Client Properties dialog, enter the smallest possible number that is appropriate for the client in the *Years of transactions to save* and the *Years of balances to save* fields.

Important! If you enter 1 (current year) in this field, transactions for the year being closed will be deleted automatically when you close the year.

4. If reducing the number of years of general ledger transactions and balances that are saved affects a year that contains transactions or balances, you must confirm the deletion of the data. Click Yes to continue.
5. Click OK.

Remove unnecessary payroll departments from employee records and from the client database

If there are unused payroll departments in the employee records and/or client database, you can conserve disk space by removing them.

Remove unnecessary payroll departments from each employee

1. In Creative Solutions Accounting, open the appropriate client database.
2. Choose Setup > Employees.
3. In the Employees window, select the appropriate employee and click the Edit button.
4. In the General tab, click the Edit depts button.
5. Clear the checkboxes for all departments that are marked but not needed.
6. Click OK to close the Edit Employee Departments dialog and return to the Employees window.

Note: You cannot delete any payroll department to which an employee is assigned.

7. Click the Enter button to save the changes for the selected employee, and then close the window.

Remove unnecessary payroll departments from the client database

1. In Creative Solutions Accounting, open the appropriate client database.
2. Choose Setup > Payroll Departments.
3. Select the unnecessary departments and click the Delete button.

Note: You cannot delete any payroll department to which an employee is assigned.

4. Click Yes in the confirmation dialog.
5. Click Done and then close the window.

Compact the client database

Due to the nature of the CSA database files, deleting information from a client record does not reduce the size of the client database automatically. You need to compact the client database to permanently remove records that have already been marked for deletion from the selected client database.

1. In Creative Solutions Accounting, choose Help > Repair.
2. In the Clients tab of the Repair dialog, highlight the ID and name and click the Compact Client button.
3. A prompt appears stating that the client was compacted successfully. Click OK.
4. Click Done.

Compact the global database

Due to the nature of the CSA database files, deleting information from a global record does not reduce the size of the global database automatically. You need to compact the global database to permanently remove records that have already been marked for deletion from the global database.

1. In Creative Solutions Accounting, choose Help > Repair.
2. In the Miscellaneous tab, click the Compact Global Database button.
3. A prompt appears stating that the global database was compacted successfully. Click OK.
4. Click Done.

Archive client data

You can back up your old or unused client data to a low-cost storage drive and delete the data from the production server. Please note that the archive drive is for backups **only**; storage of live data is not permitted. Follow these steps to change the backup / restore location.

Note: If your firm is paying for additional premium production storage space, you might be able to save money by moving older data to the archive storage drive. See the “NetStaff CS” section of the [Pricing information](#) help topic for details.

1. In Creative Solutions Accounting, choose Setup > User Preferences.

2. In the Options dialog, click the File Locations tab.
3. Enter **W:\CSA_ARCHIVE** in the *Backup / Restore* field. (You can also click the Browse button to navigate to the archive path.)
4. Click OK.
5. Choose File > Backup to use this new location.

Once you have backed up your old, unused data, you can remove the clients by choosing File > Delete.

Note: Do not use the archive location to store live production data. The archive drive allows you to store archived data at a lower cost; it does not perform at the same level as the production file servers.

Restoring archived data

Follow these steps to restore data your firm backed up to the archive storage drive.

1. In CSA, choose File > Restore.
2. Verify that the restore path is **W:\CSA_ARCHIVE**.
3. Highlight the client data you wish to restore and click the Restore button.

FileCabinet CS

The following procedures will help reduce the amount of disk space used by FileCabinet CS[®] data.

Archive infrequently accessed documents to an alternate location

FileCabinet CS enables you to free up disk space by moving older, seldom-used documents from the active data location and storing them in an archive location. By moving these documents to a different location (such as CD, a local hard drive, or an archive storage drive) and then compacting the client data, you can reduce the amount of disk space required in SaaS or Virtual Office CS.

Note: After you move documents from the active data location to local media, you will be able to access those documents only if you have access to the local media.

1. Make sure that no one else is working in, printing files to, or backing up client data to FileCabinet CS.
2. In FileCabinet CS, choose File > Archive.
3. Click the *Create archive* option.
4. Click the appropriate option.
 - *Append the archive to this volume* — Click this option to add to an existing volume of archived documents.
 - *Begin a new volume with this archive* — Click this option to start a new volume of archived documents, and then enter the volume label and any applicable comments in the fields provided.
5. Click the Continue button.

6. Click the appropriate option.
 - *All contents of selected drawers* — Click this option to archive all of the documents in all of the folders in the drawers you will select later in this process.
 - *Specific folders of selected drawers* — Click this option to limit the archive to the documents contained in specific folders within the selected drawers.
7. Click the Continue button to open the Archive dialog.
8. In the left pane, highlight the drawers you want to archive and click the Select button to move them to the right pane.
9. Verify that the path listed in the Archive location group box points to your local drive or your archive drive. (Local drives all have a \$ after the initial letter; for example, C\$ on Client (V:) is your local C: drive. Use **W:\CABINET_ARCHIVE** as the path to the archive storage drive location.) To change the archive location, click the Modify button.

Note: Do not use the archive location to store live production data. The archive drive allows you to store archived data at a lower cost, and does not perform at the same level as the production file servers. See the “NetStaff CS” section of the [Pricing information](#) help topic for details.

10. Click the Archive button to begin the archive process.

During the archive process, data is deleted from the FileCabinet CS data location and stored only in the archive data location. After the archive process is complete, you can click a volume icon in the folders window to view archive information or double-click a volume icon to access archived documents.

Note: After archiving, we recommend that you compact the data for optimal space savings. Please read the “Compact FileCabinet CS data files” section on page 6 for more information.

Restoring archived data

Follow these steps to restore data that your firm backed up to the archive storage drive.

1. In FileCabinet CS, choose File > Archive.
2. Click the *Restore archive* option and click Continue.
3. Verify that the restore path is **W:\CABINET_ARCHIVE**.
4. Highlight the volumes you want to restore, and click the Restore button.

Reduce the number of data backups from CS Professional Suite applications into FileCabinet CS

Most CS Professional Suite applications include a feature that enables you to back up the application’s data into FileCabinet CS automatically. Although this feature provides easy access to data backups, you might want to reduce the number of backups retained to minimize the disk space required for the corresponding FileCabinet CS drawer. For details on setting the options for this feature in each CS Professional Suite application, see the help in the respective application.

Compact FileCabinet CS data files

Due to the architecture of the FileCabinet CS drawer data files, it is possible for the data files to contain unused space, which results in larger files than necessary. This issue is most common after you delete or archive data. To reduce the amount of unused space in the data files, you should compact the data files periodically.

1. Make sure that no one else is working in, printing files to, or backing up client data to FileCabinet CS.
2. In FileCabinet CS, choose Help > Repair > Compact tab.
3. In the Drawers available to compact pane on the left, highlight the drawers that contain the data files you want to compact, and click the Select button.
4. Click the Compact Drawers button.
5. When the process is complete, click OK.

Fixed Assets CS

You can reduce the amount of disk space used by Fixed Assets CS[®] data by limiting the number of years for which depreciation data is retained. (Note that completing this procedure affects UltraTax CS[®] returns for years beyond the maximum number of years to be retained.)

1. In Fixed Assets CS, choose Setup > System Configuration.

Note: Depending on your security configuration, you may need to enter the master password before you can open this dialog.

2. Click the Options tab.
3. Enter a number (2 – 10) to specify the maximum years' data to be retained for **all** clients. This range includes the client's current-year data files plus any prior-year data files.
4. Click OK.

When you close the client data to the next year, Fixed Assets CS will delete data that is older than the number of years shown in this field (minus one for the current year's data files).

Archive client data

You can back up old or unused client data to a low-cost storage drive and delete the data from the production server. Please note that the archive drive is for backups **only**; storage of live data is not permitted. Follow these steps to change the backup / restore location.

Note: If your firm is paying for additional premium production storage space, you might be able to save money by moving older data to the archive storage drive. See the "NetStaff CS" section of the [Pricing information](#) help topic for details.

1. In Fixed Assets CS, choose File > Backup.
2. Click the Modify Backup Location button and enter **W:\DSW_ARCHIVE**.

3. Click OK.
4. Select the client data you want to back up and click the Backup button.

Once you have backed up old, unused data, you can remove the client data by choosing File > Delete.

Note: Do not use the archive location to store live production data. The archive drive allows you to store archived data at a lower cost; it does not perform at the same level as the production file servers.

Restoring archived data

Follow these steps to restore data that your firm backed up to the archive storage drive.

1. In Fixed Assets CS, choose File > Restore.
2. Verify that the restore path is specified as **W:\DSW_ARCHIVE**.
3. Highlight the client data you wish to restore and click the Restore button.

Practice CS

You can reduce the amount of disk space used by Practice CS® databases by deleting unnecessary databases, such as unused training and sample databases.

1. Start Practice CS.
2. In the login screen, select the database you want to delete in the **Open Firm** field.
3. Select the administrator staff ID and click OK.

Tip: Staff ID JPH is the administrator for the sample database. Staff ID ADMIN might be the administrator for training databases.

4. Choose File > Delete Firm.
5. Practice CS warns you that it will permanently delete the firm database.
6. Click OK to create the required backup of the database, and then click OK again to create the backup in the default location.
7. To delete another database, choose File > Open Firm and repeat steps 4 – 6.

UltraTax CS

The following procedures will help reduce the amount of disk space used by UltraTax CS data.

Remove prior-year data

If you have prior-year data (such as data from 2000 or 2001 UltraTax CS) that you rarely need to access, you can back up that information to local media or to an archive storage drive and delete it from SaaS or Virtual Office CS.

Notes

- After you remove data from SaaS or Virtual Office CS and back it up to local media, you will be able to access that data only if you have access to the local media.
- If your firm is paying for additional premium production storage space, you might be able to save money by moving older data to the archive storage drive. See the “NetStaff CS” section of the [Pricing information](#) help topic for details.

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1. Start the appropriate version of UltraTax CS.
 2. Choose File > Backup.
 3. In the pane on the left, highlight the clients whose data you want to back up and click the Select button.
 4. Verify that the path listed in the *Backup location* field points to your local drive or archive storage drive. (Local drives all have a \$ after the initial letter; for example, C\$ on Client (V:) is your local C: drive. Use **W:\UTxx_ARCHIVE** as the path to the archive storage drive location.) To change the backup location, click the Modify Backup Location button.

Note: Do not use the archive location to store live production data. The archive drive allows you to store archived data at a lower cost; it does not perform at the same level as the production file servers.

5. Click the Backup button.
6. After you have backed up the clients' data, delete the clients from UltraTax CS by choosing File > Delete.

Restoring archived data

Follow these steps to restore data that your firm backed up to the archive storage drive.

1. In UltraTax CS, choose File > Restore.
2. Verify that the restore path is **W:\UTxx_ARCHIVE**.
3. Highlight the clients you want to restore and click the Restore button.

Delete client data that was proforma'd from the prior year but is not needed

If you proforma'd data to the current year from the prior-year version of UltraTax CS but your firm will not prepare a return for that client in the current year, you can save disk space by deleting the client data from the current-year version of UltraTax CS without deleting prior-year depreciation data.

1. In the current-year version of UltraTax CS, close all clients.
2. Choose File > Delete to open the Delete Clients dialog.
3. In the pane on the left, highlight the clients whose data was proforma'd from the prior year but is not needed, and click the Select button.
4. Verify that the *Delete Fixed Assets CS data* checkbox is **not** marked. Note that this checkbox is available only if you are licensed for Fixed Assets CS.

Note: If the *Delete Fixed Assets CS data* checkbox is marked, UltraTax CS will delete the current-year depreciation data.

5. Click the Delete button.

Microsoft Outlook

The following procedures will help reduce the amount of disk space used by Microsoft Outlook data.

Compact the Outlook data file (or PST)

Outlook uses a data file called a "Personal Folders file" and referred to as a PST file. If you delete items (such as email messages or appointments) from a PST file, the size of the file does not change unless you compact the file.

Note: Depending on the size of your PST file, it might take several minutes to compact the file. We recommend that you compact PST files every 1 – 2 months.

1. In Outlook, choose File > Data File Management.
2. Highlight the data file that you want to compact, and then click the Settings button.
3. Click the Compact Now button.
4. When the process is complete, click OK.

Empty the Deleted Items folder

When you delete items in Outlook, they go into a “Deleted Items” folder by default. You can set up Outlook to delete these items automatically or you can manually remove them from the Deleted Items folder.

Automatically empty the Deleted Items folder

1. In Outlook, choose Tools > Options, and click the Other tab.
2. Mark the *Empty the Deleted Items folder upon exiting* checkbox.
3. Click OK.

Manually empty the Deleted Items folder

1. In Outlook, choose Go > Folder List.
2. In the Folder List, right-click the Deleted Items folder, and choose Empty Deleted Items Folder from the context menu.

Move inactive Outlook items to an archival data folder

You can create an additional, archival Microsoft Outlook data file (called a PST file) to limit the size of your active PST file. You can then back up old items such as email messages, appointments, contacts, tasks, journal entries, notes, posted items, and documents in the archival PST file.

Note: If your firm is paying for additional premium production storage space, you might be able to save money by moving older items to archival PST files and storing the files on the archive storage drive. See the “NetStaff CS” section of the [Pricing information](#) help topic for details.

Follow these steps to create an archival PST file.

1. In Outlook, choose File > Data File Management.
2. Click the Add button.
3. In the New Outlook Data File dialog, select **Office Outlook Personal Folders File (.pst)** and click OK.
4. In the Create or Open Outlook Data File dialog, enter or navigate to **W:\MSOFFICE_ARCHIVE** as the path for the PST file and click OK.
5. Enter a name in the *File name* field to indicate that the PST will be used for old items (for example, add “Archive” to the file name). If multiple users will create archive PST files in this location, further customize the file name to indicate the user to whom the PST file belongs (for example, Jsmith_Archive.pst).

Important! Outlook names the PST file “Personal Folders.pst” by default. If multiple users create PST files in the same location, such as W:\MSOFFICE_ARCHIVE, you will need to rename each “Personal Folders.pst” file to have a unique name. If users do not change the default file name, they could overwrite each others’ archive PST files.

6. Click OK to create the PST file.

7. In the Create Microsoft Personal Folders dialog, you specify a unique name for the PST file and set a password. It's helpful to give the PST file a recognizable name (such as Jsmith_archive) because the name will appear in various lists within Outlook. When you've finished making changes in this dialog, click OK.
8. In the Account Settings dialog, click the Close button.

The new PST file appears in the Outlook folder list. You can select messages or folders and drag them into the archive PST file. If you move large quantities of messages into the archive PST file, you should compact your data folders as outlined in "Compact the Outlook data file (or PST)" on page 9.