

Purging Sales Order Files

Below is a snippet from one of hundreds of articles available to JDEtips subscribers.

If you would like a complimentary copy of the full article, please email

Mark.Downs@ERPtips.com

(include the title of the article in your email)

To subscribe to JDEtips, go to

www.JDEtips.com/Subscribe.asp

JDEtips is published by Klee Associates, Inc.

JDEtips University provides both public and onsite training for JD Edwards clients.

For more about JDEtips University, including the current schedule, click on

www.JDEtips.com/WorkshopSchedule.asp

Purging Sales Order Files

Purging Sales Order files is a timely topic, as David points out. If you've been live for several years, and haven't got your purging strategy down pat, here's an excellent place to start. Even if you are an experienced JDE user, be sure to check out David's list of issues to be considered toward the end of this article. JDEtips will be featuring articles on Financial and other purges soon, so keep your eyes open for those future articles as well. This article applies equally to OneWorld and WorldSoftware.

Click here to read this Snippet

Purging Sales Order Files Almost Time for Spring Cleaning!

by David Johnson, Klee Associates, Inc.

Editor's Note: Purging files is a timely topic, as David points out. If you've been live for several years, and haven't got your purging strategy down pat, here's an excellent place to start. Even if you are an experienced JDE® user, be sure to check out David's list of issues to be considered toward the end of this article. JDEtips will be featuring articles on Financial and other purges soon, so keep your eyes open for those future articles as well. This article applies equally to OneWorld® and WorldSoftware™.

By the way, one of our favorite stories from my early days on the JDE Response Line (1989-1990) was when a client called in to complain that one of the purge programs wasn't working. I asked "Do you have a job log you can send me?" He responded, "That's okay, that file was empty anyway." Ookaayyy! Next!

The snow is still on the ground, the bills from Christmas are in and everyone is trying to lose those extra 10 lbs of Holiday Turkey and Pumpkin Pie. It will be Spring soon and we need to get into the Spring Cleaning spirit.

Many companies operate on a Calendar Year Fiscal Pattern, so the Year End is about to be a memory, not a fond one I am sure, but a memory. Now is the time many of us start to think about cleaning out our systems if we don't have a standard on-going process for it. Those of you who do have procedures in place should be commended, but still read on as this article will provide some valuable information.

Purging is typically one of the last things for which clients plan and develop procedures. It is not uncommon for clients to wait until their system performance has been affected by huge file sizes—and then the questions about purging files start. This is an important facet of any implementation and careful planning needs to be done in order to get it right.

JD Edwards comes with several purge programs that will ease the process. I will cover most of the Sales Order related purge programs in this article, but I will also introduce you to a few common pitfalls and some new complementary products that will aid you in making things as painless as possible.

Let's start with the basics:

The JD Edwards Sales Order Management module has several key files that hold the most critical data. These files include:

- Sales Order Header (F4201)
- Sales Order Header History (F42019)
- Sales Order Detail (F4211)
- Sales Order Detail History (F42119)
- Sales Order Ledger (F42199)
- Other files worth mentioning are the Price History File (F4074) and the Associated Text File (F00165 AKA. Media Object Storage). In WorldSoftware, the Associated Text File is the F4314.

Each of these files has a tool that will purge these files. JDE follows a two-stage purge methodology:

- First you purge from the current/active files (Sales Order Header, Sales Order Detail) into History Files (Sales Order Header History and Sales Order Detail History).

The purpose of this purge is just to clear out your live files in order to improve response time during interactive application use (Order Entry and Customer Service Inquiry) and the reports that run off these files such as Invoice Print.

- The second type of purge removes the records from your system entirely, either deleting them outright or sending them to offline storage.
- You then run the Sales Order Ledger (F42199) purge periodically to remove your ledger records as they will build up fast and furious in a high volume environment. Remember, the Sales Order Ledger file tracks order changes and can even write a detailed record at every step of the Order flow. Companies tend to keep these records longer than they keep data in the F4211 or F42119. However, from a procedural point of view, you wouldn't keep anything in the Ledger that wasn't in either the F4211 or the F42119.
- To keep the size of the F42199 manageable, I also recommend that clients set up the system to write Ledger records only for








| Data File Purges (G42312) | | |
|---|----------------|---------|
| Description | Job To Execute | Version |
|  Sales Order Detail (F4211) | R4211P | |
|  Sales Order Detail History (F42119) | R42119P | |
|  Sales Order Ledger (F42199) | R42199P | |
|  Sales Header Purge (F4201) | R4201P | |
|  Sales Order Text Lines (F4211) | R42960 | |
|  Batch Receiver Purge (F4001Z) | R4001ZP | |
|  Detail to History Purge | R42996 | |

Figure 1: Standard Sales Order Purge Programs

status ranges that are meaningful and more constrained. Because credit orders from history depend on the F42199, clients may want to keep Invoice records in the F42199 for a longer period of time than they do other steps in the order flow. See Figure 1: Standard Sales Order Purge Programs.

The basic Purge programs are:

- R4211P – Sales Order Detail Purge - This program purges records out of the F4211 and removes them from the system. See my notes below about why purging Sales details and headers as part of the nightly Sales Update run isn't always the best practice.
- R42119P – Sales Order Detail History Purge – This program purges records out of the F42119 and removes them from the system.
- R42199P – Sales Order Ledger Purge – This program purges records out of the F42199 and removes them from the system.
- R4201P – Sales Order Header Purge – This program purges records out of the F4201 file and removes them from the system.
- R42019P – Sales Order Header History Purge – This program purges records out of the F42019 and removes them from the system.
- R42996 – Detail to History Purge - This program purges records out of the F4211 and writes them into the F42119 File. Use this program if you do not purge to the F42119 when Sales Update is run.

Now let's talk tips & techniques.

There are a number of procedures you can follow to purge your records, including what I call "direct purging", where records are purged entirely from your system and some "indirect", such as purging records to the history files. These processes can be accomplished easily by setting up nightly batch versions of the UBEs mentioned above.

There are also many considerations that need to be addressed prior to designing your process.

Some of the common (or uncommon) questions that need to be addressed:

- Do your Customer Service people need to access orders that have already been processed through to Invoic-