



Purging and Housekeeping Strategies

By Hartley Farmer, Westbrook Systems

E1 W Editor's Note: Are your batch jobs and inquiries taking longer to run than it does to get a raise? Will copying one environment to another set back your retirement plans? If so, you could be suffering from poor data housekeeping. Let Hartley show you how to tame the uncontrolled growth in data files as he presents over 10 pages of reality-based advice on this issue. Pay attention because you are hearing it from a man with a worldwide reputation for excellence as a very senior consultant and project manager. This article applies to both OneWorld and WorldSoftware.

During over 25 years working in JDE® sites in many parts of the world, we often hear **users** complaining about how long batch jobs or inquiries take to run, or **IT/CNC staff** complaining about how long back-ups take or how long it takes to copy one environment to another. **The central issue is the poor data housekeeping at most sites and hence uncontrolled growth in data files.**

Why so many sites (and this is not unique to JDE clients) have poor housekeeping practices appears to be due to a lack of managers prepared to control what can be cleansed and archived, plus a lack of staff or consultants with the required skills to make sure housekeeping activity does not impact the smooth running of the business.

We see the problems increasing rather than decreasing as:

- A number of JDE clients move towards 24/7 operation.
- Other users switch to use of “single instance” databases reflecting the globalization of their businesses.
- Additional integrity implications of interoperability appear.
- The data contained in many tables crosses the conventional company responsibility matrixes as more business processes are implemented on JDE.

To determine why poor housekeeping exists, it is necessary to return to how the initial package was implemented:

- The various methodologies used by both JDE and its major implementation partners dictate that each client or site sets up an initial project team. When the system implementation is complete, the team is broken up and the knowledge of set-up parameters and other data storage ‘drivers’ becomes lost or, at best, fragmented (e.g., those Processing Options which the JDE/partner consultant says should be “set at detail level for the first few months of operation” or setting G/L Level Of Detail very low because “it is easy to roll detail up if ever we need it,” etc.).
- Once the project team disbands and the Power Users get their well-justified promotions (or get approached by another JDE client!), there is rarely a defined part of the organization responsible for control and/or running Integrities over data, especially in tables like Items, Address Book, UDCs, etc., i.e., those tables that contain data across the organization’s reporting and/or geographic structures.
- While JDE used to have within REP/IA/Solution Modeler methodologies a step titled Post Implementation Audit (which covered areas like review of table usage), statistics show that less than 1% of sites opted to execute it. Even fewer companies seem to have a regular housekeeping review as part of the governance process.

Once live, the size/growth of major data tables still does not seem controllable. It seems to sit in the “too hard” basket. Often heard justifications to support “do nothing” include:

- We cannot find anyone who is still around who knows what data is in the tables from the early days.
- The auditors said we needed to store this for seven years.
- We cannot get the sales and the finance folk to agree on the revenue data we need to carry in the G/L to support the sales history.
- We haven’t enough disk space to create a back up before we start the agreed purges, nor do we have the tables and work space needed to create the chosen archive database. Worse, there is not enough time available in a weekend to execute the scripts.
- We cannot get agreement on what data should be archived, at what level of detail, or what tool should be used for the data warehouse or off-line devices. (Those clients who have set up teams to define requirements for a Knowledge Broker can appreciate the passions raised by questions like: whether sales information should be by customer or by item level, and should it include discounts or rebates, etc.)

Assuming the right people can be found, the tools are in place, and most of the other issues listed above are resolved, the next issue for the site determined to do some housekeeping is how to get access to staff or consultants whose understanding of the JDE data relationships is such that they can lead a major data rationalization without any impact on production. This is especially the case where the clean up requires deletion of master file tables like Item Masters/Locations/Balances, etc., and/or tables like Work Orders that are used in many modules. (Cross-module JDE expertise is not easy to source.)

This Article Continues...

Subscribers, log in from our main search page to access the full article:

www.JDEtips.com/MyAccess.html

Not a Subscriber? Gain access to our full library of JDE topics:

www.JDEtips.com/JD-Edwards-Library

Visit www.JDEtips.com for information on the JDEtips University schedule, private training and consulting, and our Knowledge Express Document Library.

License Information: The use of JDE is granted to JDEtips, Inc. by permission from J.D. Edwards World Source Company. The information on this website and in our publications is the copyrighted work of JDEtips, Inc. and is owned by JDEtips, Inc.

NO WARRANTY: This documentation is delivered as is, and JDEtips, Inc. makes no warranty as to its accuracy or use. Any use of this documentation is at the risk of the user. Although we make every good faith effort to ensure accuracy, this document may include technical or other inaccuracies or typographical errors. JDEtips, Inc. reserves the right to make changes without prior notice.

Oracle and J.D. Edwards EnterpriseOne and World are trademarks or registered trademarks of Oracle Corporation. All other trademarks and product names are the property of their respective owners.

Copyright © by JDEtips, Inc.