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On Data Archiving

## Archiving JD Edwards® Data

By Susan Ferlita

**E1W Editor's Note:** *Is a successful data archiving project in EnterpriseOne® really all that elusive? It can be done—but requires a great deal of planning and attention to detail. In this article, Susan Ferlita defines the process her organization followed to implement an archiving strategy, including some strategy tips for long term maintenance.*

Customers who run the JD Edwards application system are often faced with the challenges of large volumes of data. Applications run at less than peak performance, real time queries take too long to return results, and maintaining the data itself is expensive, both in the form of storage and various other technical processes. If you find yourself in this situation, archiving data is a viable option that should be explored.

Technologically, the return on your project investment is realized through routine database maintenance (backup, re-indexing, updating statistics, etc.), disk space utilization, and the amount of time it takes to complete CNC tasks such as upgrade data conversions and refreshing an environment. However, the primary return on archiving is the speed with which real time queries return results and the reductions in query intensive processing time.

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Depending on data volume, each customer's results will vary. In our case, one example of data reduction was with a 550GB database for JD Edwards 8.10. After archiving three modules (Sales Order, Payroll, and Purchasing), roughly 150GB of data was archived. This data spanned a six-year period and millions of rows of data. Development continues on additional modules, with a planned scope of twelve modules overall. While 150GB may not seem like much, multiply it by the three standard environments (DV, PY, and PD) and it is easy to grasp the impact. Once all modules are archived, the database will easily be half the original size. Additionally, this same reduction in database size improved system processing time for long running processes. Payroll processing for approximately 3,700 employees was reduced by more than five (5) hours.

This article focuses on archiving a JD Edwards EnterpriseOne 8.10 system in preparation for an upgrade to 9.0, and setting up an ongoing archiving process. However, the concepts introduced can be utilized with World® or other releases of EnterpriseOne. The challenges discussed include developing a manageable archive project scope, selecting a third-party product to assist with the process, the solution implementation process, access to the archived data, and long term maintenance.



# Archiving JD Edwards Data

## Where to Begin

Before beginning the process, realistic expectations should be defined. Your company must:

- Identify problem areas (i.e., focus on modules with tables containing more than a million rows of data)
- Determine data retention requirements, both legal and corporate
- Decide if users need access to the archived data
- Decide how much data will be retained in the production system (e.g., three years of history, plus the current fiscal year)
- Decide the intervals to be used when archiving data as part of regular business operations (i.e., the initial archive project is complete, but how do you intend to continually maintain/purge data from your system?)

Answering these questions will help determine an expected return on investment and lay the groundwork for the project scope. The investment can be in the form of an internally developed archive solution or a third-party application. As previously noted, this article focuses on the process of selecting and implementing a third-party solution.

It should also be noted that the JD Edwards system itself contains various purge or summarization processes by application module, but no overall comprehensive solution or consistent process utilized by every module. The sales order module, for example, has a batch process (UBE) for moving transactions to history, a batch process for removing records from the system entirely, and yet another for removing ledger records. When you look at the standard purge processes for payroll, there are no out of the box batch processes to purge data at all. The argument could be made as to why you would want to remove payroll transactions from the system, but the reason is obvious when your goal is to improve system performance and reduce disk space utilization. The key here is the ability to access any data removed from the live system, which we will address a little later.

The final step in preparation is to select the project team. Potential team members include: Application Business Analyst(s), JD Edwards CNC, and Database Administrator. A project lead should also be selected to coordinate the efforts of all team members. Depending on the size of the project, team members can serve multiple roles.

## Product Selection Process

After completing the initial preparation, an exploration of the market to determine the availability of archiving solutions should be completed. Several solutions are available; although they may run on different software platforms (Windows, AS/400, Apache Tomcat) or be geared more towards specific application releases (EnterpriseOne vs. World). Accepting vendor solution proposals is a great mechanism to help determine what will best fit your business needs. To begin, a requirements document should be prepared that includes:

- Definition of overall project objectives
- Description of the overall JD Edwards system architecture currently in place
- Application release and version
- Identification of modules to be archived
- A sampling of row counts on tables to be archived
- Definition of the solution selection criteria/process and expected decision date
- Expected project completion timeline

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