



# BUSINESS CONTINUITY: DISASTER RECOVERY PLANNING

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*Editors Note: This article is presented jointly by Hartley Farmer and Mike Wright. (Mike's contribution starts on page 11. Hartley addresses the various aspects of recovering data, while Mike offers the CNC perspective of programs and system objects. We begin with laying out a plan to protect your data, then move along with points to ponder regarding your system. You'll find that this White Paper gives you some excellent pointers to help you make key decisions in this critical area.*

## Introduction

Because no one site is the same as another, it is not possible to specify a single set of standards or rules that will universally apply when establishing a disaster recovery plan. This is due to:

- Program modifications (including interfaces)
- Differing platforms and operating systems
- Non-JDE<sup>®</sup> systems integrated with the JDE modules (including data warehouses)
- On-line devices connected to the system
- Data in transition from one module to another or from/to a system interfaced with JDE
- What modules are being used

In effect these variables create a virtual disclaimer with regard to the observations and suggestions made in this paper.

One area, however, where there are common approaches is the area of data, so this paper concentrates on the factors each site must take to account to regarding JDE-specific data. This paper covers:

- Taking of security copies
- Off-site storage
- The various means of recovery

While we cover total system loss issues, we concentrate on the risks of data loss/corruption, integrity issues and on invalid data caused by incorrect processing. Areas such as availability of host sites, communication/access at replacement site, passwords, redundant operating systems, incompatibility of O/S on reloads, etc., are outside the scope of this document and can be reviewed in most EDP Audit publications. This paper also excludes recovery of base JDE program objects together with any modifications or enhancements, as these are covered under separate JDEtips articles.

The paper starts with an initial premise that the all sites' user communities expect maximum up time and the maximum number of hours of availability per day. A site with these characteristics usually conducts security backups using tools that emphasize speed. The backup process is usually executed in an unattended mode in the middle of the night (often while parts of the environment are active) and usually onto relatively slow but cheap media devices such as tapes. **This paper suggests that this emphasis may need review;** i.e., the emphasis as to how much time should be allocated in a day to complete backups and the most appropriate media and tools to use should be evaluated with respect to the speed, ease and efficiency of recovery, as well as its thoroughness.

## The Risks We Need To Manage



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What then are the main factors creating risks to the business' ability to continue to operate and which of them have the highest risks? There is an excellent article titled 'Creating a Security Plan' in the November 2002 edition of JDEtips covering this topic. Statistically, the cause of most data recovery scenarios arises from some form of incorrect processing of data—for example, a period close accidentally run, or when a major table update like Sales Update or 3-Way Receipt Matching halts before completion. In these examples, users may continue to process transactions, unaware that there may be serious data integrity issues.

### Risk Minimization Factors

- ❑ Keep the data tables as small and as current as possible. While this may be easy to say, today's business world makes it difficult to relate the need for speed and amount of detail required against the available time to complete housekeeping. There is a logical trade off point where the time required to complete security back ups and the subsequent time to recover must be compared with the need for modern management's desire for continuous and immediate access to all the data. We suggest you read a previously published JDEtips White Paper, available in the Data Archiving category for more information on purging and archiving your data.
- ❑ Always keep the most recent copy of the data as close to the production environment's storage device as possible and as close as possible to the format of and the physical device of the live/production data. This will greatly speed recovery time as it avoids the need to retrieve security copies from an off-site location. A risk analysis usually will determine that the second oldest copy should be the one kept off site, because in the event of a system failure sufficient to require access to an off-site set of tapes, then the site is probably faced with a more serious problem than a recovery induced by something like a Standard Cost Roll Up that was run too early. Ideally the current copy of the data tables should be on an on-line device.
- ❑ Make sure the owners of the data are made aware of any risks and the impact of the need for maximum uptimes and the highest throughput speeds. Involve business personnel in the decisions as to:
  - How much data needs to be stored (again referring to the Purging & Housekeeping Strategies White Paper in the Data Archiving category at [www.JDEtips.com](http://www.JDEtips.com) for a detailed discussion and format for this).
  - What the key business processes are. For example, customer order taking may be a key process, but inter-company orders may not be.
  - Minimum and maximum times each of the business processes can be either off line or how long the system can run without specific 'nice to have' facilities like the G/L or Invoice transaction history inquiries.
- ❑ Recognize the other factors that are required to support a data security plan; i.e., it is not just the actual data that needs to be saved—in the event of a recovery, a site will also need:
  - Access to manuals describing the steps to be taken during the recovery
  - Contact persons who have an in-depth knowledge of the systems

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