CHAPTER 54 - PURGE OVERVIEW 2

CHAPTER 54 - PURGE OVERVIEW

The Purge Setup from allows for the definition of tables to be purged and rules to be applied to these tables to determine record retention. If a particular row is eligible for purging, the system deletes the row from the standard system tables and adds the data to a table with the same name which is owned by the "arc" (archive) data base user. After the purge is complete, the data in the archive tables can be exported to any archive media using Oracle's export functionality.

At the beginning of the purge run, the system checks to see if an associated archive table exists.

- If the schema of the archive table matches the standard table's schema, the newly purged rows will be appended to the archive table.
- If the archive table schema does not match, the archive table is dropped and a new one is created.

Locks for the Purge

Also at the beginning of the purge run, an application lock (key value "PURGE") is established to guarantee that only a single purge process can be running. A System Defaults Parameter ("PURGEAUTOUNLOCK") determines if the lock is to be automatically released once the purge is complete. If the default value is set to an "N" the lock is not automatically released and another purge will not run until the lock is manually deleted (on the Utilities/Locks form). By not automatically releasing the lock, the system administrator can ensure that another purge will not run until the Archive data has been exported from the environment’s instance.

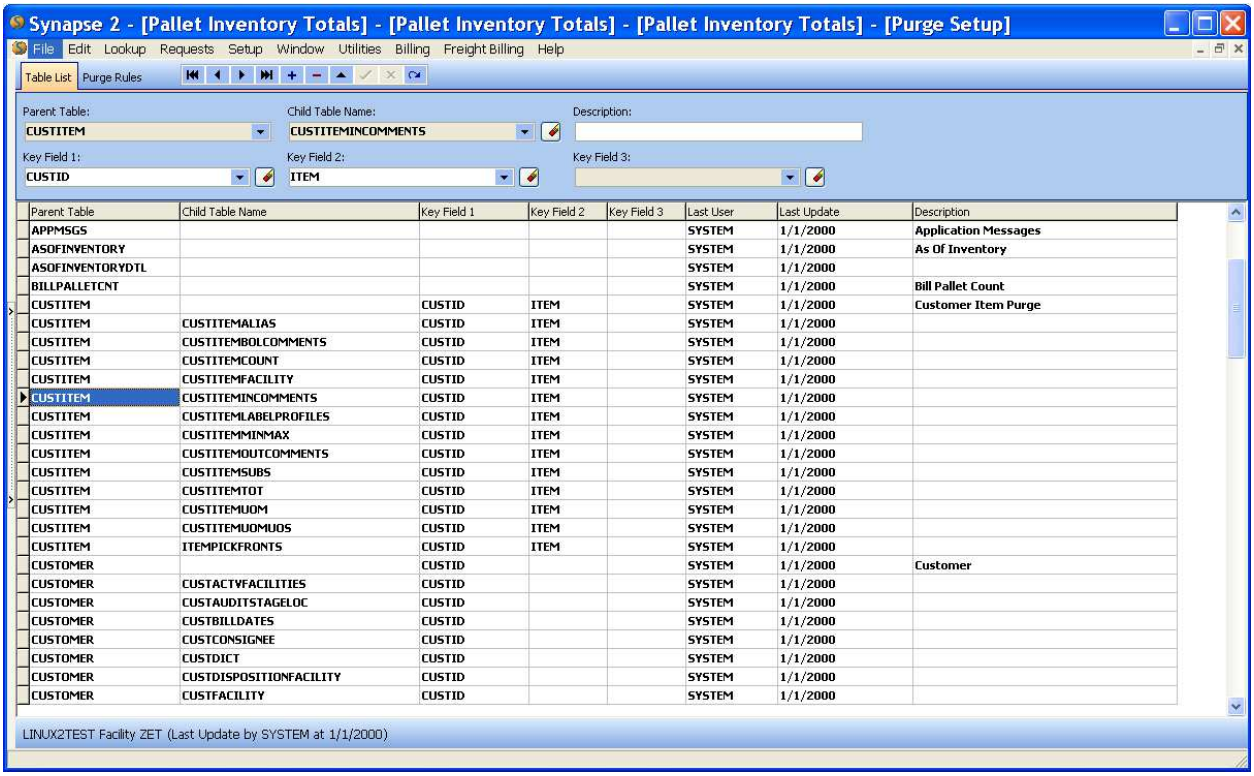
Purge Execution

- A "purge_run.sql" script has been provided that actually executes the purge. This script can be scheduled via Synapse's scheduler for automatic execution.
- A "drop_archive_tables.sql" script has also been provided which will drop all archive tables in preparation for a new purge run.

Utilities/Purge/Purge Setup

This form allows for definition of a list of tables to be purged and also for purge rules to be established.

Utilities/Purge Setup/Table List Tab



This tab allows for the definition of tables to be purged. Rules must be provided for each "Parent" table that is defined. If a "Parent" row is eligible for purging, all defined "child" rows in other tables will also be purged. This allows, for example, all rows associated with an Order to be purged once the Order Header is eligible for purging. A base set of Tables and Rules has been provided in your database.

To define a "Parent" table, add a Table List entry that has a Parent value but does not have a Child Table Value. If there are "Child" tables to be defined, provide the key fields that link the Parent Table with the Child Table. If there are no "Child" tables, no keys need to be provided.

To define a "Child" table, add a Table List entry that specifies both the Parent and Child. Also provide the key fields that link the Child with its Parent.

Purge Rules Tab

This tab allows for the definition of rules to be applied to all parent tables:

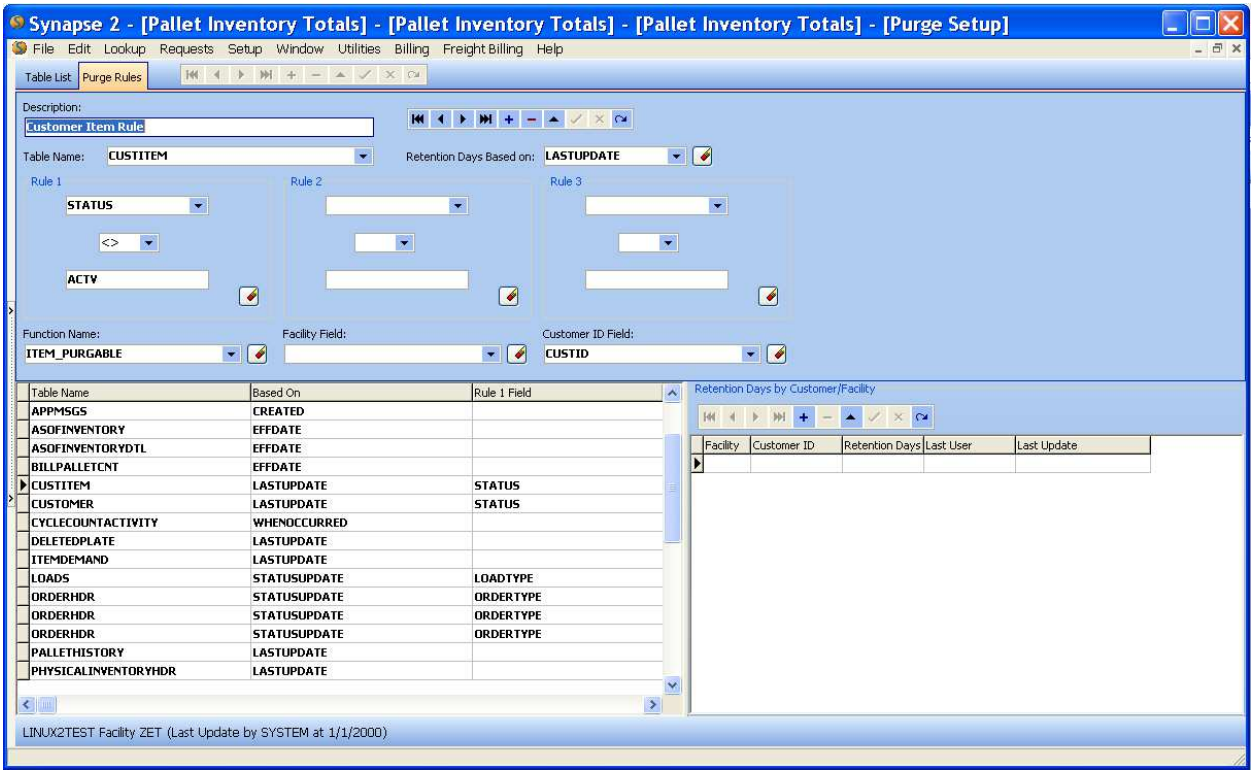


Table Name: The name of the Parent Table

Retention Days Based On: The date column to be examined for retention.

Rule 1, Rule 2, Rule 3: The rules to determine if a row should be examined

Function Name: This is a special function field used to determine Customer and Customer/Item retention. The PURGE will automatically stamp the "lastupdate" column of any Inactive (status <> 'ACTV') "Customer" or "CustItem" table row when it finds matching data in the database. Therefore, the "lastupdate" value will be current as long as there is data associated with the Customer/Item codes in the database. The "item_purgable" and "custid_purgable" functions provide a double-check to ensure no Customer or Item row is purged if there is associated data in the "Plate", "ShippingPlate"

Facility Field: If there is a column in a table that represents a facility, enter the column's name here. The system will use the Facility value in conjunction with a "Customer ID Field" column to determine retention days. (In most tables, the facility column is simply called "facility".)

Customer ID Field: If there is a column in a table that represents a customer id, enter the column name here (in most tables, the Customer Id column is called "custid").

Purge Rules Tab/Retention Days by Customer Facility Grid

When a purge rule is added, the system will automatically add a retention entry with a blank facility and customer Id value. The System Default value, "PURGEDEFAULTDAYS", is examined to determine the default retention days value. If desired, other retention day entries associated with a particular Facility and/or Customer ID value can be entered. This allows for different retention periods by Facility and/or Customer Id. When purging, the system will first look to see if a retention entry has been defined for both the Facility and Customer. If so, that retention value is used. If not, the purge logic will then look for a retention entry that matches the Customer ID and has a blank facility entry. If no match on Customer is found, then the purge logic looks for a match on Facility (with a blank customer). If no match is found, then the retention value is obtained from the default entry (blank Facility/blank Customer).