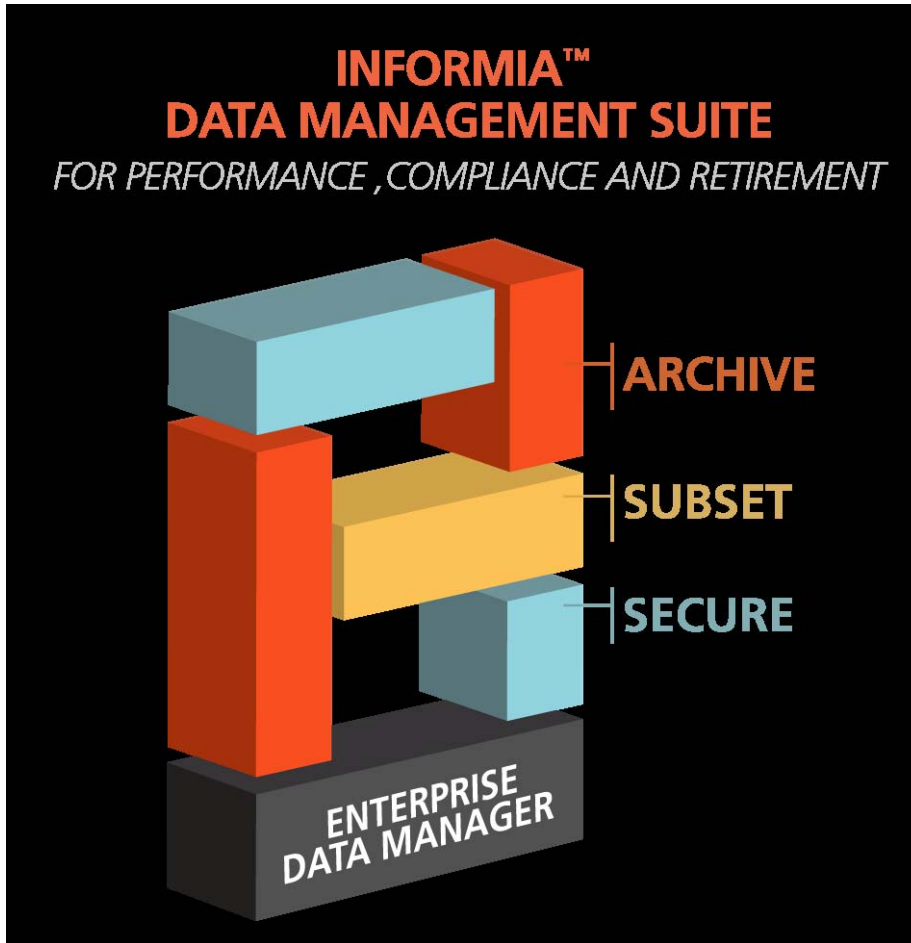


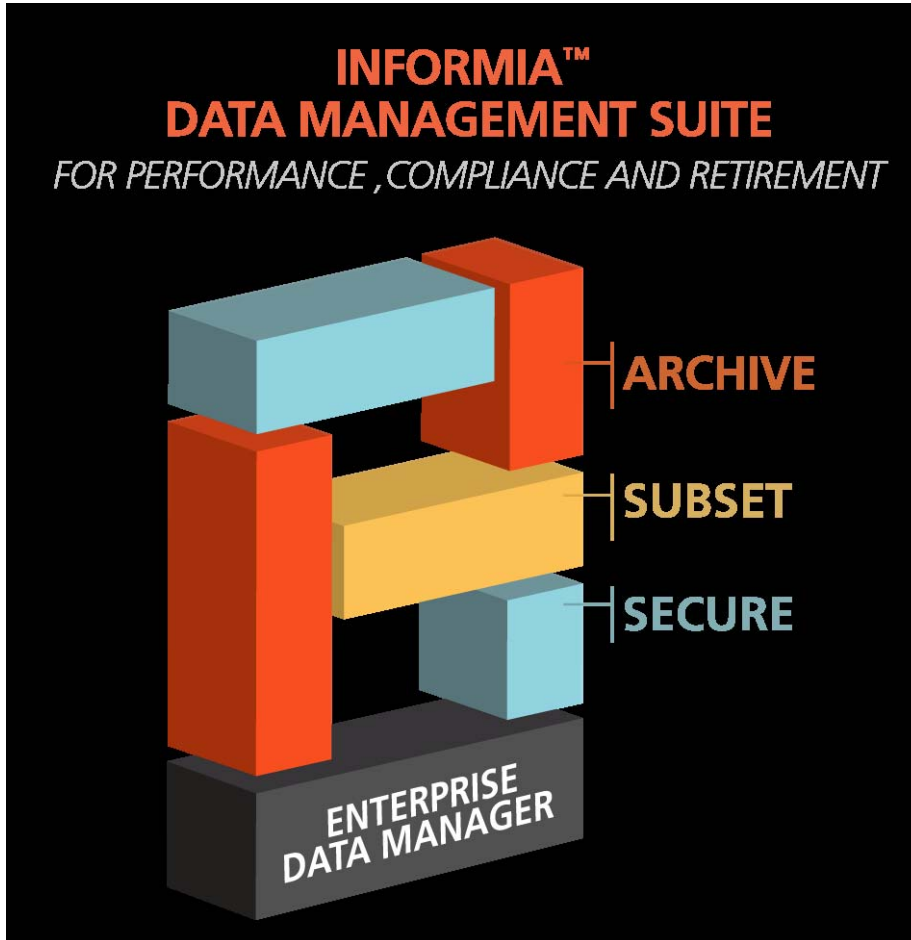
Archiving Best Practices for Oracle Applications

Joshua Alpern, VP Sales Engineering



- ✓ The leader in enterprise data management software
 - ✓ Information Lifecycle Management
 - ✓ Compliance
- ✓ Focus on enterprise applications
- ✓ Unified, integrated product suite
- ✓ Over 10 years of experience





IT and Business Challenges

- Production Application Performance
- Application Retirement
- Data Retention Regulations
- Test and Development Optimization
- Data Privacy

Applimation Lifecycle Management



INFORMIA

Informia Archive

- Archive & Purge inactive data
- Access current and archived transactions through the native business application

Informia Subset

- Create smaller, faster test and development databases
- Copy incremental data to keep environments current

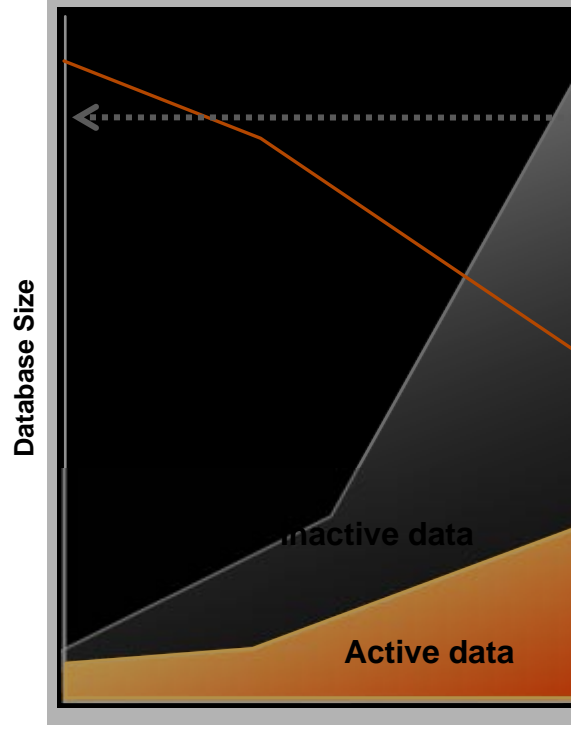
Informia Secure

- Protect sensitive information

Benefits:

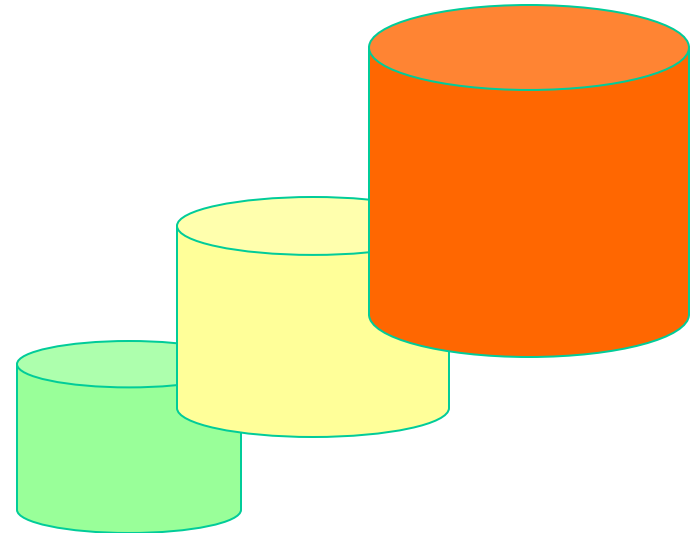
BEFORE SOLUTION

- Growing storage costs
- Diminishing performance
- Increasing maintenance & compliance work



Business reasons to manage growth

- Performance
 - Data Entry / Batch Processes taking too long to complete
- Compliance requirements
 - Gov't regulations
 - Data must be retained for potential audits
- Storage Costs
 - Continuously purchasing storage to keep up with growing data size
- Application Upgrades
 - Increased growth due to larger footprint



Systemic problems caused by data growth

- Batch processing and data entry taking longer
 - Users wasting time due to long wait times
- Maintenance windows expanding
 - Back and recovery processes at risk due to long timeframes
- Production size unwieldy to copy for testing and development



Data Management Options

- Purchase additional hardware
- DBAs tune application standard code
- Purge using Vendor provided purge routines if available

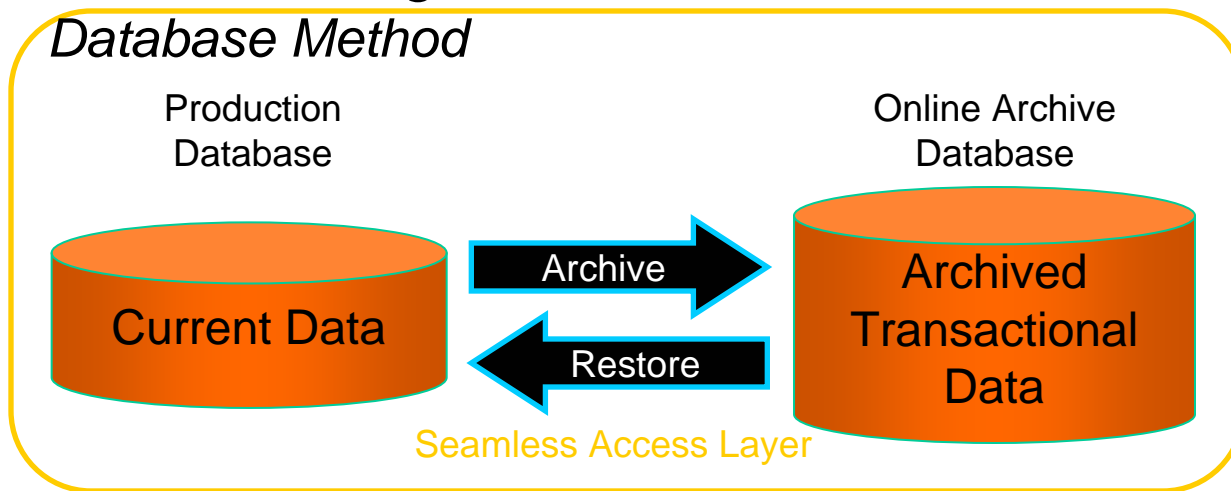


THE PROBLEM: constantly spending on hardware, tuning only does so much, purging doesn't archive

Oracle Application Archiving

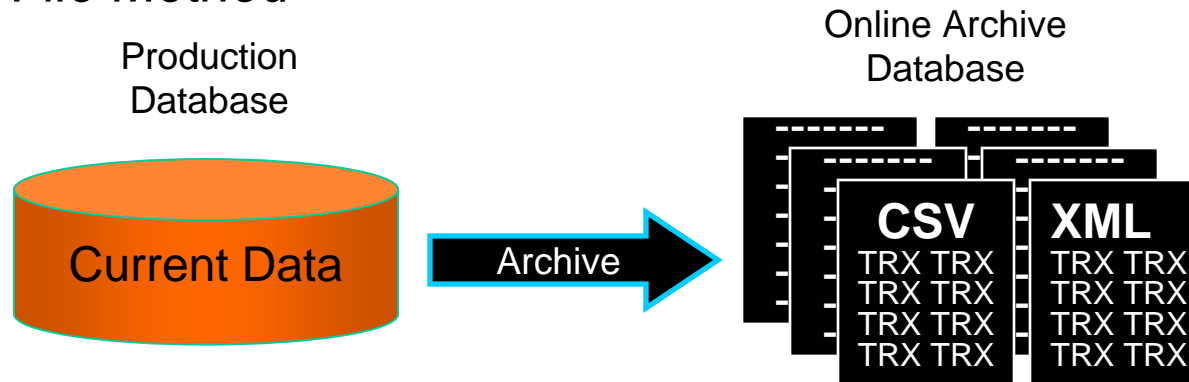
Archive for Performance – Operational Efficiency

Database Method



- Access archived data through production interface
- Keep data in database format

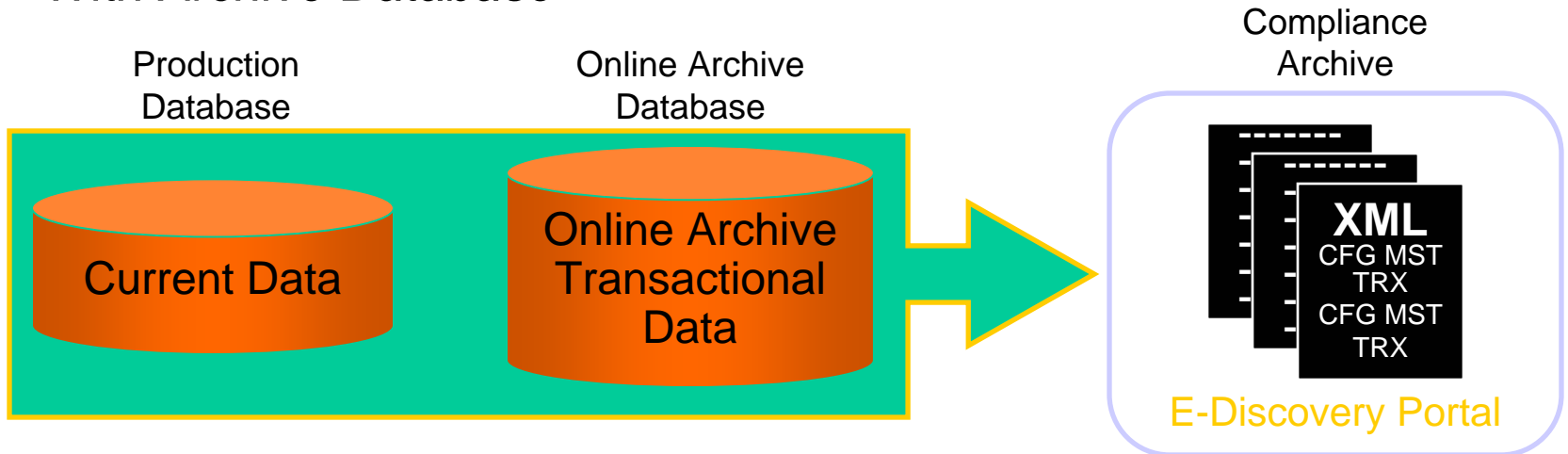
File Method



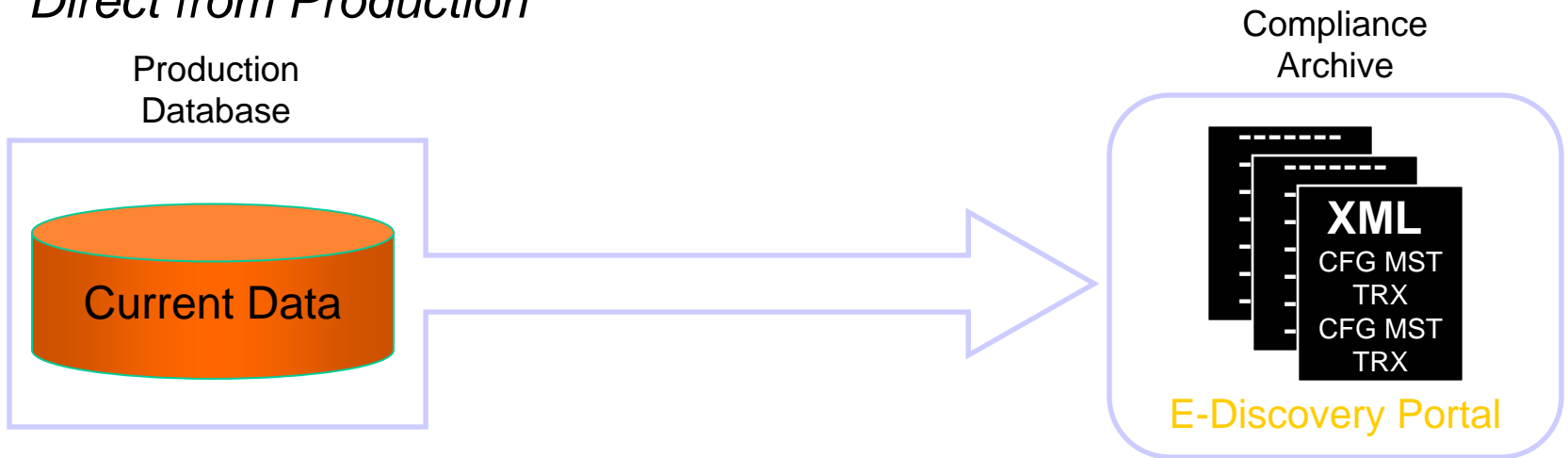
- Archive data to flat file formats for storage reduction

Archive for Compliance- Long Term Retention

With Archive Database



Direct from Production



Archive for Retirement – Legacy Applications

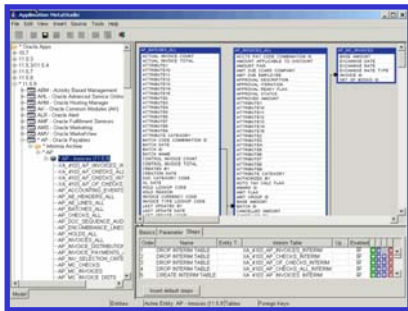


Index

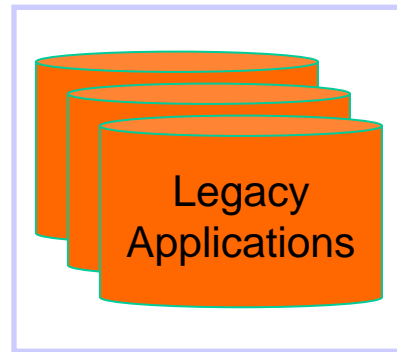
1	10	20	30	40	50	60	70	80	90
2	11	21	31	41	51	61	71	81	91
3	12	22	32	42	52	62	72	82	92
4	13	23	33	43	53	63	73	83	93
5	14	24	34	44	54	64	74	84	94
6	15	25	35	45	55	65	75	85	95
7	16	26	36	46	56	66	76	86	96
8	17	27	37	47	57	67	77	87	97

Reporting

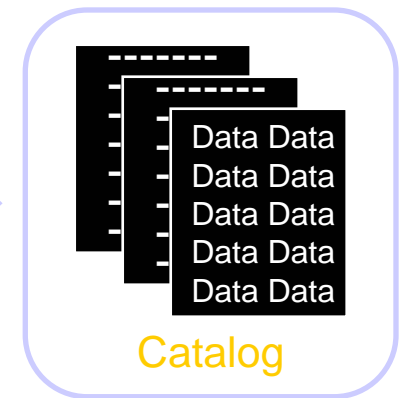
ID	Trx #	Date	Amount	Code	Flag
21	3457	7/18	345.56	NRG	J
38	8305	4/12	465.44	JTR	P
52	9133	1/17	659.11	NRG	J
59	7723	7/10	762.91	ILN	K
67	1935	8/27	882.13	ERT	J
83	9898	6/14	136.82	CSP	K
92	2119	3/19	931.86	TDA	P



Enterprise Data Manager

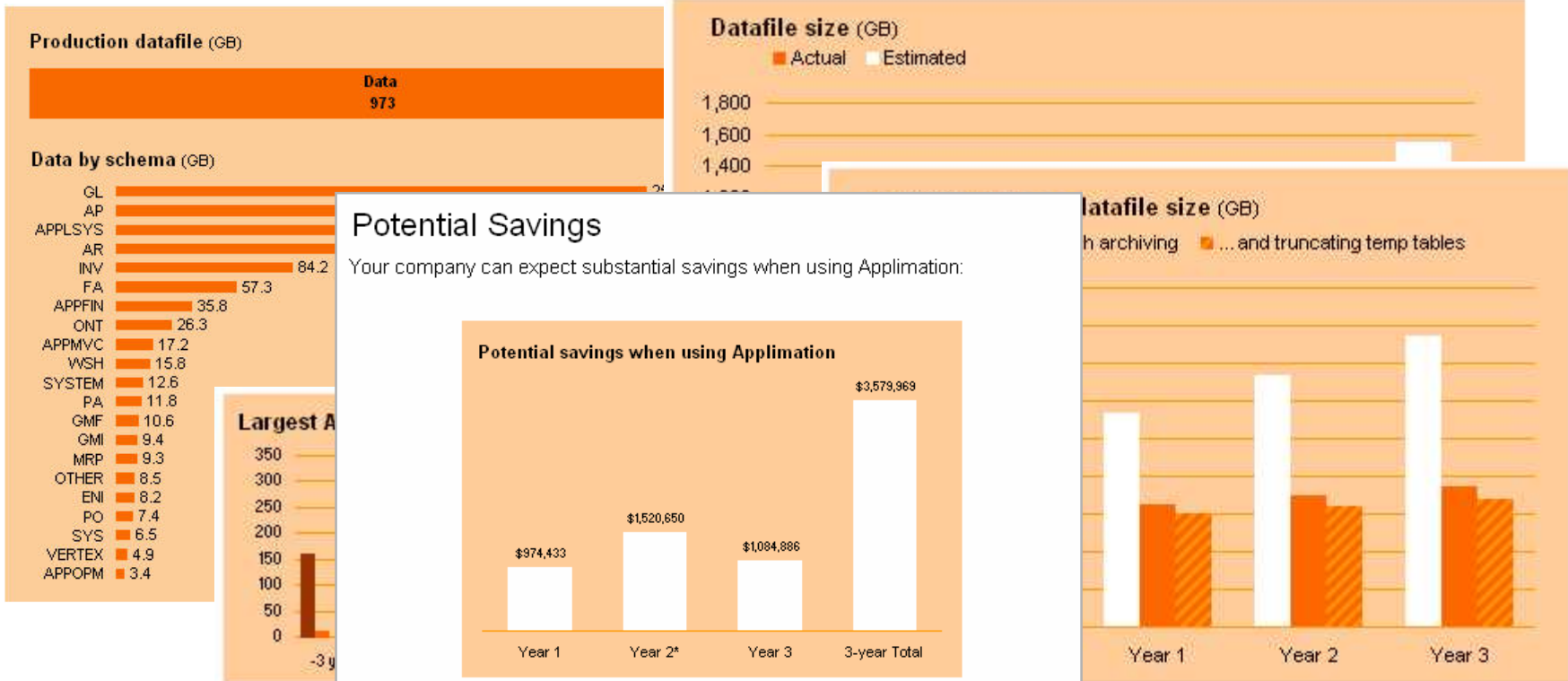


Archive Engine



Data Growth Trends - "PRE" Installation

- Insight into application data – current state and future growth
- Simulate archiving policies – your policies and your data
- Calculate ROI based on your polices and data



Home Workbench Administrator Jobs Help

Dashboard Current Location: Home > Dashboard

Home Workbench Administrator Jobs Help

Dashboard Current Location: Home > Dashboard

Home Workbench Administrator Jobs Help

Dashboard Current Location: Home > Dashboard

General

Instance: GLPROD
Database Size: 5196.19
Last Analysis: 2007-05-13 14:00:00.0

Instance: PRODAHST
Database Size: 1099
Last Analysis: 2007-05-13 14:18:43.0

General

History in GB (Used)

Application Home: AM_HOME@dev
Application Platform Release: 4.8
Platform: Solaris
Database: 9.2.0.5
Users: 25826

Modules

Objects

Largest Objects : Total 148835.0

History in GB

Legend for History in GB:

- GL_IE_LINES
- MTL_TRANSACTION_ACCOUNTS
- CST_ELEMENTAL_COSTS
- ORDER_LINE_LOG
- BKMTL_TRANSACTION_ACCOUNTS

Hide details

[Back To the Tablespaces](#)

Results Per Page: 10 Results 1 - 10 Of 650

Owner	Object Name	Total Size	Total Indexes	Total Indexe Size
AM_HISTORY	CST_ELEMENTAL_COSTS	38425	2	24725
AM_HISTORY	ORDER_LINE_LOG	36750	2	9025
AM_HISTORY	GL_IE_LINES	26470	3	5785
AM_HISTORY	BKMTL_TRANSACTION_ACCOUNTS	23595	0	0
AM_HISTORY	MTL_TRANSACTION_ACCOUNTS	23595	7	43300
AM_HISTORY	BKMTL_MATERIAL_TRANSACTIONS	23040	0	0
AM_HISTORY	MTL_MATERIAL_TRANSACTIONS	23035	31	44320
AM_HISTORY	GL_IMPORT_REFERENCES	21375	4	16070

First | <Prev | Next | Last

Determine Success Criteria

What are you trying to achieve?

- Storage reduction
- Performance Improvement
 - Batch processing
 - Reports and queries
 - Maintenance windows
- Planned Upgrade

Critical to planning
the implementation

Achieving
stakeholder buy-in

Establish a Data Retention Policy

The screenshot shows the Oracle Applications interface. On the left, a list of entities is displayed under the heading 'Entities'. A search box with a 'Find' button is at the top of this list. The entities listed include: INV - Misc Employee Transact, INV - Cost Acctg (8.8), INV - Counting Event (8.8), INV - Physical (8.8), INV - Replenishment (8.8), INV - Shipping (8.8), PC - Projects (8.8), PO - PO and Requisitions (8.8), and PY - N.A. Payroll (8.8). At the bottom of the list are 'Select' and 'Cancel' buttons.

Overlaid on the right is a configuration window for the entity 'GL - Balances Actuals (8.8)'. It includes the following fields and controls:

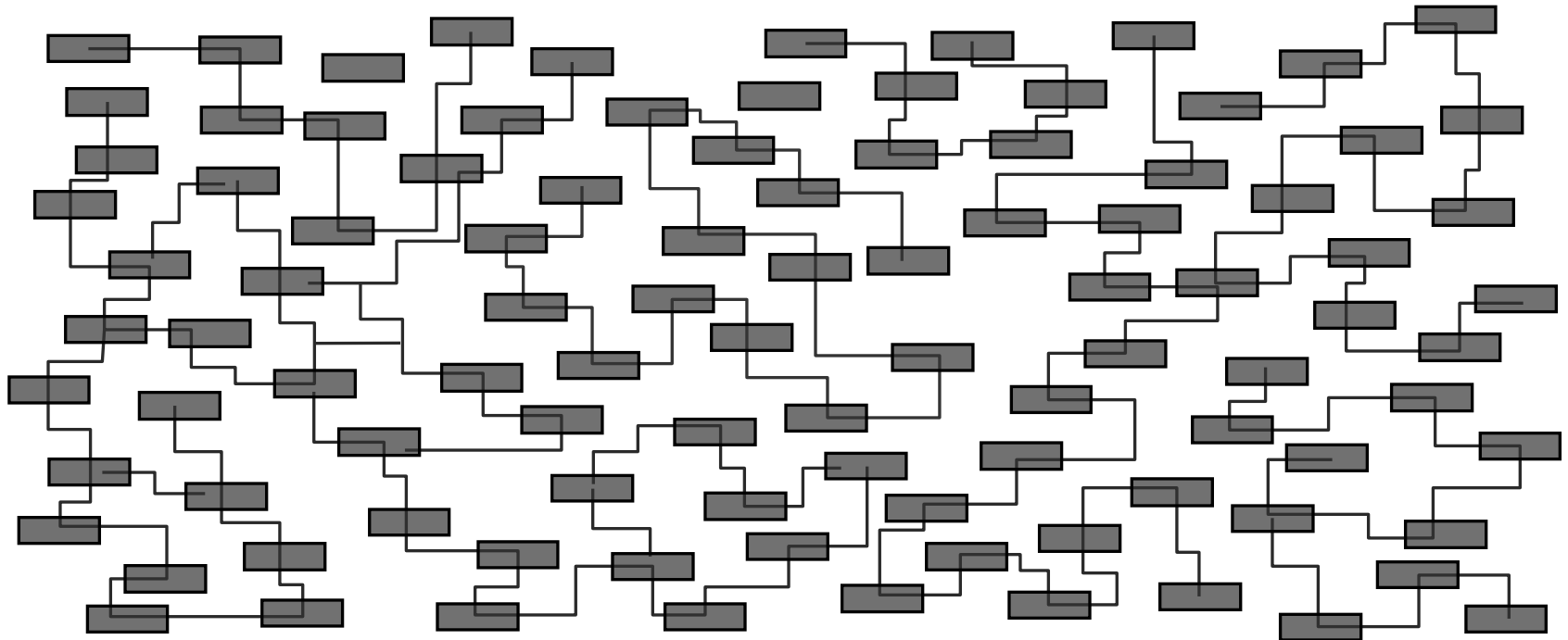
- Enabled?**
- Entity Name:** GL - Balances Actuals (8.8)
- Report Type:** Summary Report
- Newest Archivable Value:** (button)
- Operator/Value table:**

Operator	Value
Business Unit	--- Select one ---
Ledger	--- Select one ---
Archive to Fiscal Year	--- Select one ---
- months** (text label next to the 'Archive to Fiscal Year' row)

- Built in Entities and criteria – no need to define the criteria yourself
- Select from LOVs
- Dynamic lists from your application environment
- Use a number of months – not a hard-coded date

What is a Business Rule?

Application logic that determines whether a transaction is suitable for deletion

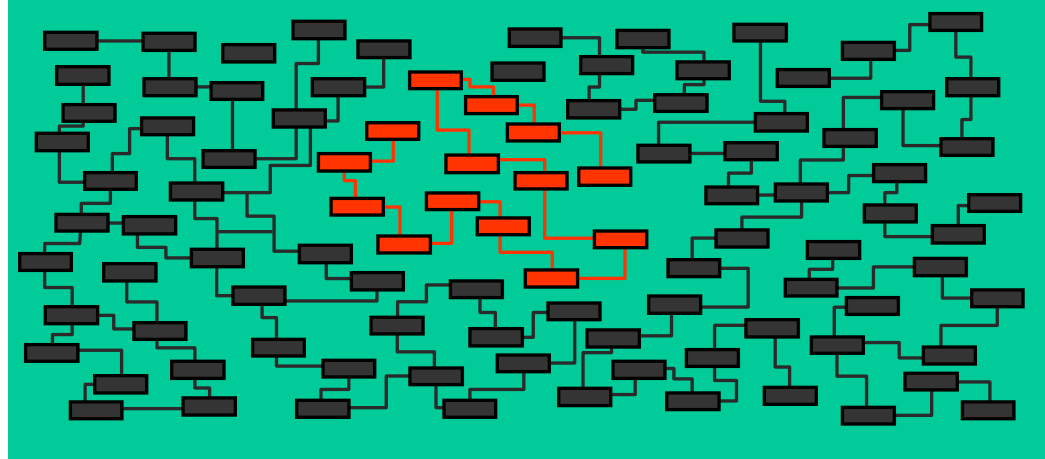


Business rules MUST cascade throughout the application to ensure that application integrity is maintained

What is an Accelerator?

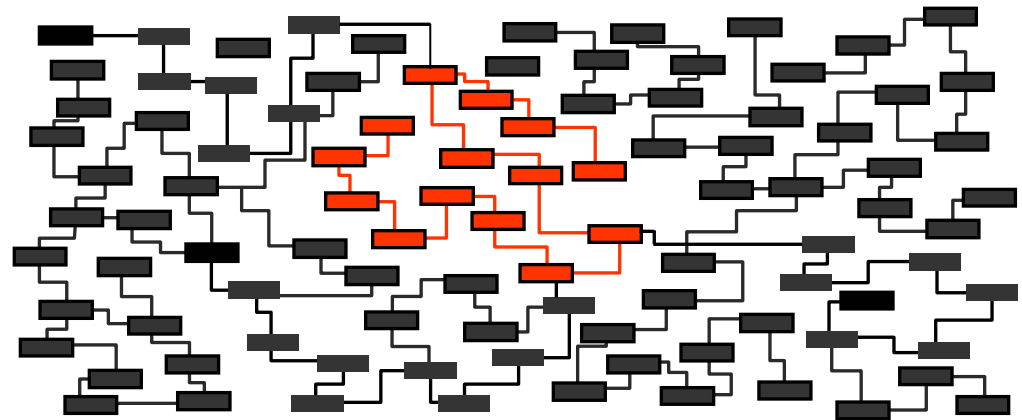
Entity Definition

- Logical unit to archive
- Database and application level relationships
- Policy scoping criteria



Business Rules

- Transaction chaining
 - Within an entity
 - To other applications
- Testing of Fields, Flags, & Codes



Accelerator Component	Examples
Entity	<ul style="list-style-type: none"> • General Ledger Journal Actuals • Inventory Transactions • CRM Service Requests
Business Rule	<ul style="list-style-type: none"> • PO matched to an invoice • Voucher not distributed • Change Request activity is open
Policy Scope Criterion	<ul style="list-style-type: none"> • Business Unit • Transaction Date • Order Type

Pre-Packaged Business Rules

Job ID	Status	User	Items to
5763	● RUNNING	AMADMIN	Archive:

Program		Interim Table	Operating Unit	Purgeable	NonPurgeable	Total
<input type="checkbox"/>	Generate Candidates					
<input type="checkbox"/>	Freeze Pro					
<input type="checkbox"/>	Build Stagin	XA_5691_AR_POST_INTERIM	US001	17	86	103
<input type="checkbox"/>	Gather Pre-	Exception(s)				Count
<input type="checkbox"/>	Archive/Pur	Conversation Item Exists				0
<input type="checkbox"/>	Gather Post	Item Exists on Item Worksheet				40
<input type="checkbox"/>	Gather Pre-	Item Exists on Payment Worksheet				
<input type="checkbox"/>	Xpress Mer	Item Exists on Statement				
<input type="checkbox"/>	Gather Post	Item Status Open				86
		Item on Dunning Letter				0
		Pending Item Not Posted				0

Many business rules have to be passed.

Seamless Data Access for End-Users

The image shows two overlapping browser windows from Microsoft Internet Explorer. The top window's address bar contains the URL `http://demo01.applimation.com:195/erp/c/PROCESS_JOURNALS.JOURNAL_ENTRY_IE.GBL?FolderPath=PORTAL_ROOT_OBJECT`, with the path `sp/fin88/EMP` highlighted in a red box. The bottom window's address bar contains the URL `http://demo01.applimation.com:195/erp/c/PROCESS_JOURNALS.JOURNAL_ENTRY_IE.GBL?FolderPath=PORTAL_ROOT_OBJECT`, with the path `sp/fin88hist/EM` highlighted in a red box. The bottom window displays the 'Create Journal Entry' form, which includes a 'Menu' on the left with options like 'Journal Entry', 'Standard Journals', and 'Ledgers'. The main form area has a title 'Create Journal Entry' and a description: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The form contains several input fields: 'Business Unit' (dropdown set to '=', text box with 'US001'), 'Journal ID' (dropdown set to 'begins with', text box), 'Journal Date' (dropdown set to '=', text box with '01/01/1999'), and 'Document Sequence Number' (dropdown set to 'begins with', text box).

