

OP! Purge Menu

Purging is the removal of historical or inactive data which is older than a user defined date. Since most of the reporting within **ORDER POWER!** is provided between user selected dates, once data is purged, most reports will not include the purged data.

Click on an option below to read more about purging that file. Also, read about another, similar option, ****DTAQ Removal**.

Run these purges only when there are
no **ORDER POWER!** users on the system.

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PRG01                      OP! 4.0 CATALOG CO# 001                      3/12/02
CSIUSER                    ORDER POWER!                          Purge
DSP108S2

Select one of the following :

 1. Purge Posted GL Transactions          13. Flag AR Detail as Inactive
 2. Purge AR Detail                      14. Purge Deleted Master Records
 3. Purge Orders                          15. Purge Deleted Shipping Records
 4. Purge Manifest                        16. Purge AP Vendors and Activity
 5. Purge Purchase Orders                 17. Purge Bid Files
 6. Purge Order Audit                     18. Purge Abandoned Web Orders
 7. Purge Inventory History               19. Purge Web Store Log Files
 8. Purge Sales Tax Transactions          20. Purge Prospect File
 9. Purge Mail List                       21. Purge Pick Batch Log File
10. Flag Phased Out Items for Deletion    22. Purge Price & S/H Audit Files
11. Purge Return Authorizations
12. Purge AR Batches                      25. View Purge/Refresh History

More...
?Selection
===>

F1=Help F3=Exit F4=?List F9=Command Line F12=Cancel
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1. Purge Posted GL Transactions

This process prompts you for a GL posting date to identify General Ledger interface transactions you want to purge. These transactions are stored in file PGLTRN, which is the detail file that captures GL transactions prior to being posted to the General Ledger. It should be noted that by purging these transactions, you lose the ability to drill-down to them using the GL Account Transaction History Inquiry's Drill-Down function.

2. Purge AR Detail

This is detail on orders only purges orders that have been paid in full and shipped complete through a date that you specify. Running this purge removes these transactions from all future runs of the AR Activity Reports.

3. Purge Orders

Removes orders from the Order Header (PORHDR) and all related files like Order Detail (PORDTL), Order Comments (PORCMT), Shipment (PORSHP) with the following stipulations:

- the order date must fall within the date range defined on the selection panel
- there must not be any active AR transactions for the order
- the order must be closed (not active)
- the order must not be associated with an active return authorization or purchase order
- if the purging order is a credit memo, it must not be associated with an active order.

An exceptions report is printed at the conclusion of the order purge cycle which lists all orders failing to meet the purge criteria.

Keep in mind that many reports use this data. Running this purge prevents you from viewing previously order items (from the purged orders) while in Order Entry. Most clients keep 3 - 5 years of historical orders.

4. Purge Manifest

Removes records from the Manifest File. The date of the manifest must be the same as, or older than the date entered on the selection panel.

The Manifest purge, allows you to purge by company, shipper #, and/or thru date. When the manifest is purged, you will no longer see the package information (option 9) in customer inquiry. Purging this file will clean up disk space if you are running low.

Since this file is a cross-company file containing the data for all the shipments, the operator must specify the company(s) and shipper number(s).

5. Purge Purchase Orders

Removes inactive purchase orders that have been fully received/costed or canceled on or before the date entered on the selection panel.

6. Purge Order Audit

There are times when you wish to keep your order records but not interested in the audit trail. The audit records contains information regarding the user id, date and changes performed on any the record. This option will remove order audit

records only for those Order Header with a completion date equal or older that date prompted for and the order status is "S"hipped or "C"anceled.

7. Purge Inventory History

Removes all inventory transactions older than or equal to the transaction date entered on the selection screen. Most clients keep about one year of Inventory history.

8. Purge Sales Tax Transactions

This option removes daily sales tax transactions through the date entered on the selection panel. Sales Tax records are used when you run the Sales Tax report. This report advises you what country, state, county and local municipality taxes you owe . When you purge those records, you can no longer run the Sales Tax report for that period.

9. Purge Mail List - Customers

Removes "soft deleted" mail list records (MLDELETE="D") from the Mail List Master File as long as there are no AR records, orders, and/or counter sale orders associated with them.

10. Flag Phased Out Items for Deletion

This feature will "soft delete" items flagged as phase-out items as long as there is no quantity on hand, no active orders, and no active purchase orders associated with them.

Records are not deleted from the Item Master File. However, the phased out item record is flagged as deleted.

11. Purge Return Authorizations

Removes inactive return authorizations that have been fully received or canceled on or before the date entered on the selection panel. Most clients keep about six months to one year of RA history.

12. Purge AR Batches

Removes any **posted** Accounts Receivable batch whose posting date is the same as or older than the thru posted date entered on the selection screen. You can also choose to delete a specific batch, multiple batches, or a range of batches.

13. Flag AR Detail as Inactive

This option flags certain AR detail records as inactive (order balance equal to 0, and the last activity date within date requested). This optimizes AR inquiry, AR aging, and Statements because they do not need to read any of the inactive records.

These records are **not permanently removed** from Order Header. You can permanently remove these records by using option 2, *Purge AR Detail*.

14. Purge Deleted Master Records

When you delete any master record in the Work with Files menu, the record is not actually hidden rather than removed from the system. This option permanently removes these records that are "soft deleted" from the system.

15. Purge Deleted Shipping Records

This option permanently deletes the following records after you have "soft deleted" them:

- **PSVMAN** (manifest master)
- **PSVSHIP** (ship via master file)
- **PSVZON** (ship zone file)
- **PSVRAT** (ship rate file)
- **PSHCLC** (ship calculation chart info)
- **PSVWGT** (ship rates by state)
- **PSVZIP** (zip/ship via file)
- **PORWHS** (zip/warehouse file)
- **PZNSKP** (zone skip file)
- **PINSHP** (warehouse/shipper file)

16. Purge AP Vendors and Activity

This option purges vendor activity through a specific check payment date. It will also purge deleted and temporary vendors that have no activity, and Item/Vendor records, if selected. The Purchase Order Purge must be run prior to the AP Purge to allow costed purchases to be removed. Purged activity includes purchases, payments, checks, and invoices. Please note that the vendor activity history is displayed by the GL Drill-Down process and will no longer be available if purged.

17. Purge Bid Files

Most clients keep only those bids that they consider still relevant. This purge removes all bid information if it is in CANCELLED status, and also removes bids in ACTIVE status but created before a date that you to specify.

18. Purge Abandoned Web Orders

Use this report to remove abandoned web orders from the iSeries 400. You can select to print a listing of these orders, if that information is of interest to you.

19. Purge Web Store Log Files

Use this option to remove unneeded server log files. The web server produces log files that keep a record of every access to a Web Store, and hold the raw data to be analyzed. These logs can be used by most web analysis software packages. After you have the information you want, the logs can be purged.

20. Purge Prospect File

This option removes prospect records when they are no longer relevant. Relevancy must be determined by your marketing staff. Many criteria are available in this option to select names for purging.

21. Purge Pick Batch Log File

Releasing Orders for Pick Tickets creates an audit trail of the selections taken to release a batch and how many orders were selected in a file that can be viewed thru option #6 of the Order processing menu.

This purge permanently removes the audit trail records older than the date requested.

22. Purge Price & S/H Audit Files

Removes all the audit records for any item price changes and shipping and handling charges changes. The audit records contains information regarding the user id, date and changes performed on any item price record.

25. View Purge/Refresh History

This is an inquiry option to view the audit trail of any purges or refreshes executed in the system. It displays the User, Date, Time and process (purge or refresh) performed.

****DTAQ Removal program**

This option is available from the **System Operation Menu**. It removes DTAQs (data queues) that are at least one week old. Keep in mind that when you run this option, it removes DTAQs for all **ORDER POWER!** companies, not only the one you are using at the time.

You can run this option with users active in **ORDER POWER!**

Purging

Purging is the removal of historical or inactive data which is older than a user defined date. Since most of the reporting within **ORDER POWER!** is provided between user selected dates, once data is purged, reports would not include the purged data.

There are a number of stand alone purges as described below. Each can be run separately (but not at the same time). Each purge should be run when there are no **ORDER POWER!** users on the system. Each can be run on different days with processing taking place in between. It is recommended that the purges occur in the sequence described below.

File: AR Detail Transactions

Rule 1. Balance for order must 0.

Rule 2. Order must not exist in order header file or must not be "active".

Rule 3. Last transaction must be older than ../../.. (prompt).

Related Files: None

Updated Files: AR Summary - one record per day per tender summarizes payments (P) and refunds (R).

File: Order (Header/Detail/Shipment)

Rule 1. AR transactions must not exist.

Rule 2. Order must not be "active".

Rule 3. Order must be older than ../../.. (prompt).

Rule 4. Order must not have an active return authorization, purchase order.

Rule 5. If credit memo, order must not have an active order.

Related Files: Order Comments

Line Comments

Order Audit

Tax File

Updated Files: Mailing List

Media

Since most reports allow the user to select a date range, and almost all reports are based upon the orders being available in open or closed status, after the order purge, many of the reports will not include purged orders.

File: Mailing List

Rule 1. AR transactions must not exist.

Rule 2. Orders must not exist.

Rule 3. Must be flagged with a "D".

Related Files: Comments

Updated Files: Media

File: County/Local Tax Rates

Rule 1. No active orders exist with ship to zip within the range specified on the deleted record. Items (to be defined) etc.

File: Purchase Orders(Header/Detail)

Rule 1: PO must not be active.

Rule 2: PO completion date must be equal to or older than date prompted for if received/costed. PO dated checked if PO cancelled.

Related Files: PO comments

PO line comments

Updated Files: None

File: Sales Tax Transactions

Rule 1: Transaction must be equal to or older than date prompted for.

Related Files: None

Updated Files: None

File: Manifest

Rule 1: Record must be equal to or older than date prompted for.

Rule 2: Must be finalized record-containing a pick up record#.

Related File: None

Updated File: None

File: Order audit

Rule 1: Record must be equal to or older than date prompted for.

Rule 2: Order must not be active.

Related File: None

Updated File: None

File: Inventory History

Rule 1: Transactions must be equal to or older than date prompted for.

Related File: None

Updated File: None