

System Clean-Up Procedures

Performing regular system clean-up procedures for each iCARaS company is critical to all system processes. System maintenance will minimize processing time, help prevent file corruption, and will help minimize disk space usage.

The following system maintenance procedures are separated into two categories:

- ◆ **User Responsibility** – performed by iCARaS users
- ◆ **iCARaS Manager Responsibility** – performed only by the person overseeing the iCARaS installation.

User Responsibility

- ◇ The following procedures should be performed **weekly** or **monthly** for each iCARaS company to keep processing times at a minimum.
- ◇ After performing maintenance and purges, have the iCARaS Manager run the **Reorganize Index Files & Part/Destination Clean Up Process**. Those instructions are also included in this document.

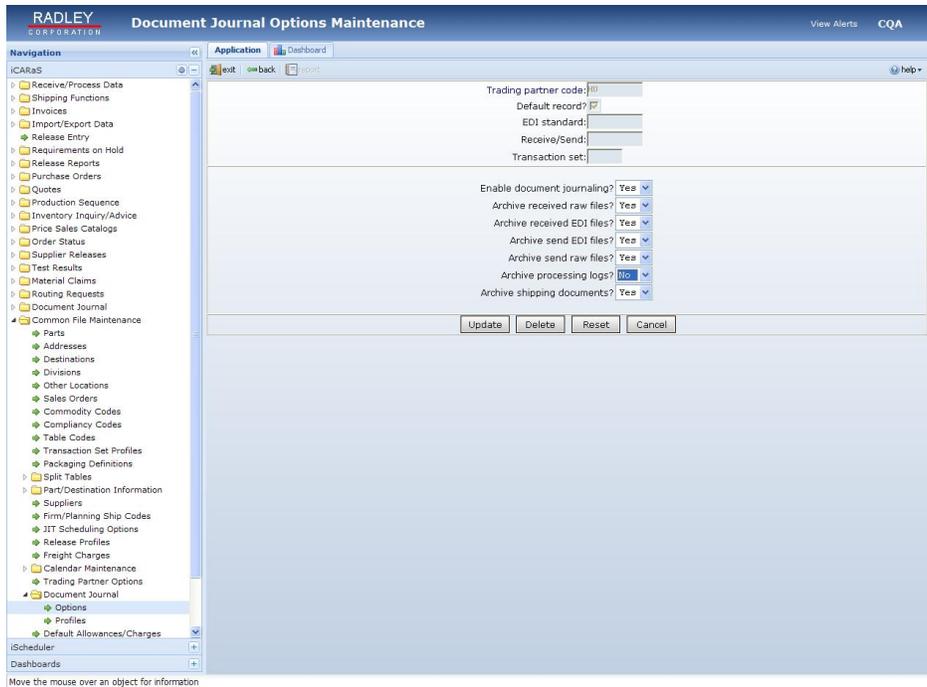
Define Document Journal Options

This allows you to specify what types of data are archived.

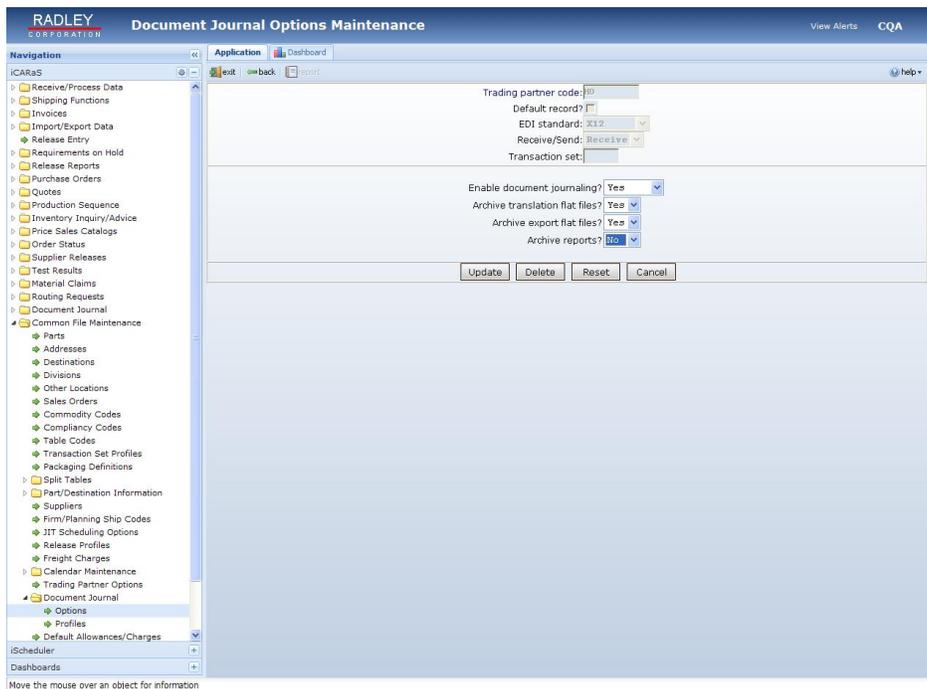
Steps to perform:

1. Select **Common File Maintenance** from the main iCARaS menu.
2. Select **Document Journal** and then select **Options**.
3. Make the appropriate selections based on internal business practices. Note that a default record should be defined, as well as a record for inbound transactions and outbound transactions.

NOTE: *Keep in mind that the amount of data that you archive is completely at your discretion, but it's important to point out that the more data being archived, the more disk space will be consumed for storage of the archived data. In addition, there is some redundancy when archiving, so consider carefully which flags should be set to "Yes". If you have questions regarding the Document Journal Options Maintenance setups, please contact Radley Customer Support.*



NOTE: Select “Yes” to enable document journaling and make the appropriate selections at the remaining fields within this window.



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RADLEY CORPORATION Document Journal Options Maintenance View Alerts CQA

Navigation: Application Dashboard

Trading partner code: 80
 Default record: 1
 EDI standard: X12
 Receive/Send: Send
 Transaction set:

Enable document journaling? Yes
 Archive import files? Yes
 Archive processing logs? No
 Archive by trading partner, document, and supplier? Yes

Update Delete Reset Cancel

Select yes/no to indicate whether documents should be archived in TP/doc/supp-specific directories

NOTE: Select “Yes” to enable document journaling and make the appropriate selections at the remaining fields within this window.

Define Data Retention Period per Transaction

This allows you to specify the number of days that data for certain transaction sets will be retained internally. The system will automatically purge data that is older than the number of days specified for each transaction.

Steps to perform:

1. Select **Common File Maintenance** from the main iCARaS menu.
2. Select **Trading Partner Options**.
3. Advance to the **Data Retention** tab.
4. Enter the number of days data should be retained for transactions that apply.

NOTE: When defining setups for the retention of release history, if you enter 30 in this field, approximately 30 days of release history will be stored in the indexed release history file at one time. The contents of this file will be purged each day when the first person logs into iCARaS and approximately 30 days (per the example) will be maintained in the index file. When the automatic purge occurs, the records are moved to a sequential file where they can still be accessed by the Release History Reports. Note that the higher the number of days you will be retaining release history, the more likely you are to experience slower processing of inbound release data.

Maintain Requirements on Hold

Print a report of the Hold file to ensure that there are no valid releases remaining in that file. Delete any invalid releases.

Steps to perform:

1. Select **Requirements on Hold** from the main iCARaS menu
2. Select **Report** and then review the report for any releases that may need to be deleted.
3. Select **Purge** to remove any invalid releases.

Maintain Invoice Maintenance

Purge Invoice (810) files, if necessary. This is only applicable for trading partners that require 810/INVOIC's to be transmitted.

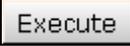
Steps to perform:

1. Select **Invoices** from the main iCARaS menu.
2. Select **Invoice Report** from the **Report** folder. Print the report and review all Invoices. Note that the same report can be printed from Invoice Maintenance by clicking .
3. Select **Purge Invoices** and enter the criteria for purging. Located in the company directory, the filenames are: **CAEINV_HDR, CAEINV_DTL, CAEINV_LOD, CAEINV_PRG, CAEINV_SNO**.

Maintain Shipper Maintenance

Print a Shipper Report to ensure that there are no shippers that have been created but not shipped.

Steps to perform:

1. Select **Shipping Functions** from the main iCARaS menu.
2. Select **Shipper Maintenance**.
3. Click  and the **Shipper Report** window will be displayed.
4. Fill in the criteria and then click  to view the report on the display. Review all shippers.
5. Delete any invalid shippers that were created.
6. To move shippers from **Shipper Maintenance** to **Shipping History**, run the **Daily Shipping Report**. If the CARAD_INI option “**UPDATE_SHIP_HST_ON_PRINT**” is enabled in **Initialization Option Maintenance** within **System Maintenance**, then shipping history gets updated when shipping documents are printed. Located in the company directory, the file names are: **CASHIP_ADD, CASHIP_CDN, CASHIP_CSN, CASHIP_CTN, CASHIP_DTL, CASHIP_DNT, CASHIP_HST, CASHIP_LBL, CASHIP_NTE, CASHIP_SNO, CASHIP_STA.**

Maintain Exported Shipments, if applicable

If exporting shipments from iCARaS, then it's necessary to manually purge exported shipments to reduce processing time.

Steps to perform:

1. Select **Import/Export Data** from the main iCARaS menu.
2. Select **Purge Shipping Interface**.
3. Enter the criteria for purging. Be sure to check “**Exported shippers**” and uncheck “**Posted shippers only**” if all shipments have been imported into the other application.

Purge the Document Journal

This allows the user to purge any unwanted information from the Document Journal. Archived Document Journal data consumes a large amount of disk space and will slow system performance.

Steps to perform:

1. Select **Document Journal** from the main iCARaS menu.
2. Select **Purge**.
3. Enter the criteria for purging.

NOTE: Purging the Document Journal will also purge data stored in the archive directory. Note, that if desired, a job can be scheduled to purge the Document Journal on a regular basis. For more information on scheduling jobs, refer to the online iScheduler documentation.

Part/Destination Clean Up Process

The Part/Destination record sometimes contains obsolete and/or invalid release data. If the trading partner sends requirements for a particular part and destination, the requirements will remain on file until all requirements have been shipped or the trading partner sends a zero release to remove all unshipped requirements. If neither of these happen, then iCARaS provides three methods of removing requirements from the part/destination.

Steps to perform:

To perform any of the procedures, print the **Status Inquiry** report and determine what is invalid. The **Status Inquiry** report contains two major sections, one is the header portion of the report and the second is the detail portion that contains the requirements. Most will want to keep the header portion for years and years, but the detail portion is no longer needed after a short period of time.

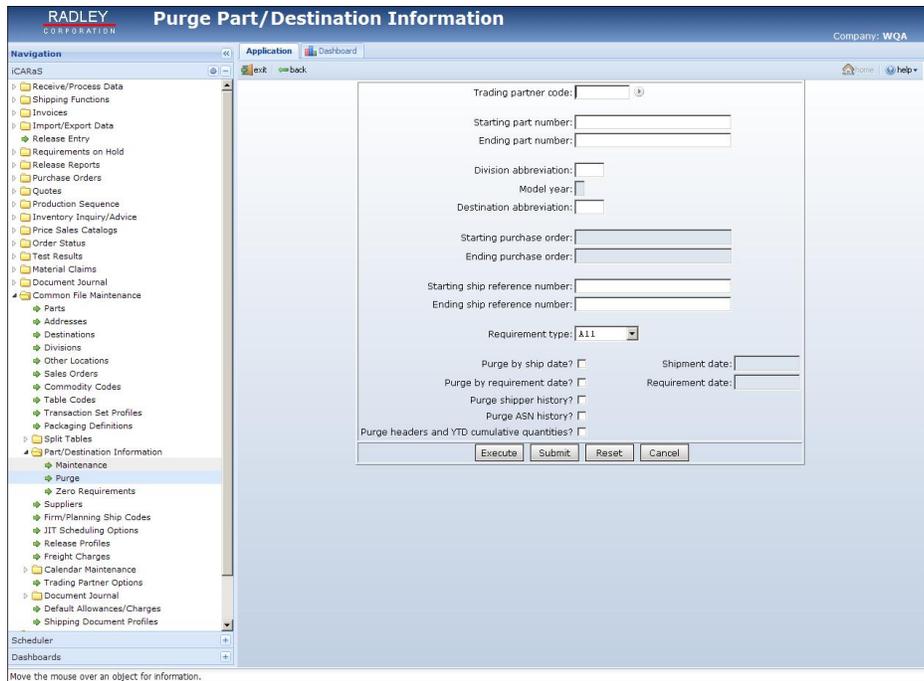
The following three options are available to clean up the part/destination file when selecting **Common File Maintenance** and then **Part/Destination Information**.

The screenshot displays the 'Part/Destination Maintenance' window. The navigation pane on the left shows a tree structure with 'Part/Destination Information' expanded to 'Maintenance'. The main form area contains the following fields and controls:

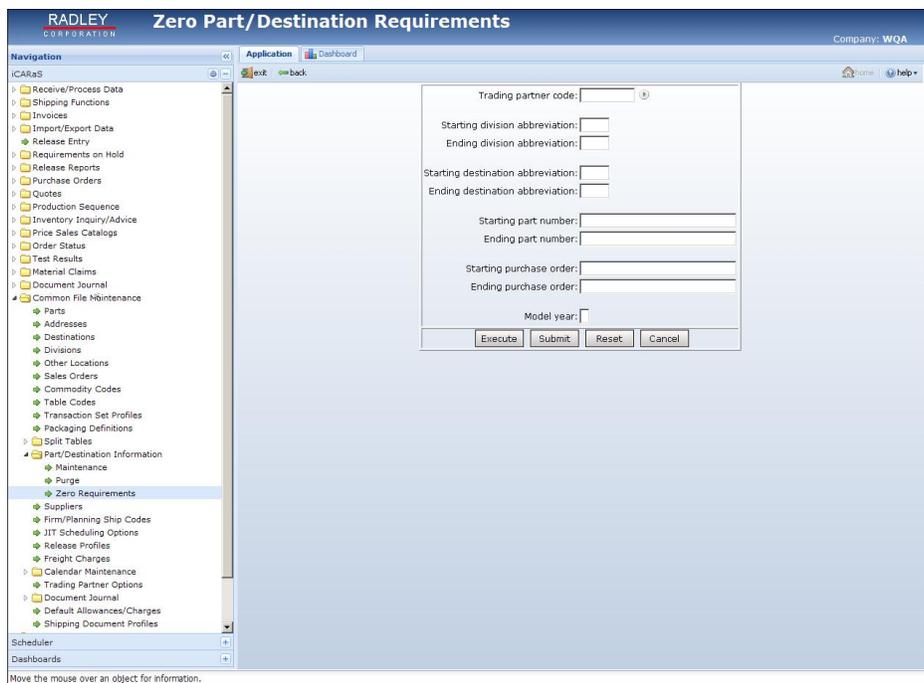
- Trading partner code: [FO]
- Destination abbreviation: [RP21A]
- Division abbreviation: []
- Part number: [01221 0002U]
- Trading partner part: [01221 0002U]
- Model year: []
- Purchase order: []
- Year to date cumulative quantity: []
- Today's cumulative quantity: []
- Last shipment date: []
- Last shipment quantity: []
- Exclude from export:
- Days in-transit: []
- Hours in-transit: []
- Apply in-transit: []
- Line feed: []
- ASN part number: []
- Purchase order: []
- Firm/planning ship code: []
- Obsolete part?:
- Cum start date: []

Buttons at the bottom: Add, Reset, Cancel.

1. Delete the entire part/destination record (the header and detail records of the status inquiry report would then be removed). To accomplish this, select the **Maintenance** option and bring up a record. Simply click the delete option and all records will be deleted.



2. Purge the part/destination records that have been inactive using the user-defined options (this only purges the detail information of the status inquiry report). When this happens, a message stating **"No Requirements on File"** will appear in the detail area. This option also allows you to optionally delete header records.



3. Zero requirements simply makes all the detail line requirements on the status inquiry report equal zero. It leaves each detail line requirement and changes the existing requirement to zero. It's best to do this, then re-select to export requirements and choose to export zero net

quantities. By doing this, the order can be automatically changed from a requirement to zero. Then the user should go back into iCARaS and run the purge function.

NOTE: When Part/Destination History is purged, several files are created in the company directory that contains the purged data. The files created are date stamped with the year and month of the purge (i.e. **CAPDST_HDR_201307.SUP**, **CAPDST_DTL_201307.SUP**, and **CAPDST_LBL_201307.SUP**). **These files need to be deleted in order to free more disk space and to optimize processing time.**

Purge Label Database

This would only be necessary if you are printing bar code labels within iCARaS. This function allows you to purge the contents of the bar code label database, removing unwanted labels and old data.

Steps to Perform

1. Select **Shipping Functions** from the main iCARaS menu
2. Select the **Bar Code Labels**
3. Select **Purge Label Database**
4. Enter the criteria for purging.

Purge iScheduler Job History

This function allows you to purge a range of completed jobs based on run date/time or specifically by job name, access code, or user name. Job history will build up quickly, so it's important to purge often to prevent file corruption.

NOTE: Before purging completed jobs, filters should be set to determine the amount of job history that will be purged. If you attempt to purge jobs with no filters in place, the following message will be displayed: **"You are about to request all 'Completed' jobs be purged! No filters are set!"** If you continue the purge process, without setting filters, all completed jobs will be removed. Refer to the **"Set Filters"** section within the iScheduler section of this document for additional information on setting filters.

To purge completed jobs, (once filters are in place), take the following steps:

Steps to Perform

1. Select **iScheduler** from the main iCARaS menu
2. Within the **Jobs** window, click **"Running/Pending"**, and then **"Completed"** and the completed jobs will be displayed.
3. Click **"Actions"** and then click **"Purge Jobs"** to purge completed jobs and the following message will be displayed: **"You are about to request all 'Completed' jobs that match the filters be purged!"**
4. If you click **"OK"**, the **Purge Jobs** window will be displayed, which allows you to schedule the purge.
5. To schedule the purge, enter the scheduling information and click **"Submit"**. Note that the **"Description"** will default to **"Purge Jobs"**, but you can change it to any description that you desire.
6. When the purge has been submitted, the **"Purge Jobs"** job will be listed as a pending job in the **Jobs** window. This job will be executed according to the scheduling information you entered.

iCARaS Manager Responsibility

- ◇ The next two procedures must be performed for each iCARaS company during off times (when iCARaS is not being used). Note that only the person overseeing the iCARaS installation should be performing these maintenance duties.
- ◇ It is strongly recommended that the iCARaS manager run these two options on a **weekly** or **bi-weekly** basis to keep overall iCARaS processing time as efficient as possible.
- ◇ Each time information is processed, records are deleted and replaced in several files.
- ◇ By performing any type of reorganization, all files will be kept at a manageable size and will optimize processing time.
- ◇ **The importance of performing this procedure must be stressed!**

Recommendations before running any Reorganization of files:

1. If running interactively, have all users exit from iCARaS.
2. Make sure that no jobs are scheduled to run during the reorganization.
3. Consider running the reorganization as a scheduled job through the Radley iScheduler when all users logged are out of iCARaS and no other jobs are running.
4. Check the amount of available disk space. The system must have free disk space, at least equal to the current size of the files, to be reorganized.
5. Make sure a current backup has been performed before using this option.

Reorganize Index Files by Category (iCARaS Manager Responsibility)

Steps to perform:

1. Select **System Maintenance** from the main iCARaS menu.
2. Select **Reorganize Indexed Files**.
3. Select **By Category**.



4. Check all categories that you would like to reorganize.
5. Check “**Delete temporary files**”.

Consider purging ASN History (iCARaS Manager Responsibility)

ASN History gets populated every time an ASN/DESADV is transmitted.

Steps to perform:

1. Select **Shipping Functions**.
2. Select **ASN History**
3. Select **Purge**
4. Enter the criteria for purging.

NOTE: When ASN History is purged, a file is created in the company directory that contains the purged data. The file created is date stamped with the year and month of the purge (i.e. CAASN_HST_201307.SUP). This file needs to be deleted in order to free more disk space and to optimize processing time.

Consider Purging Shipping History (iCARaS Manager Responsibility)

Shipping History gets populated when the Daily Shipping Report is run or when shipping documents are printed.

Steps to perform:

1. Select **Shipping Functions** from the main iCARaS menu.
2. Select **Shipping History**.
3. Select **Purge**.
4. Enter the criteria for purging.

NOTE: When Shipping History is purged, a file is created in the company directory that contains the purged data. The file created is date stamped with the year and month of the purge (i.e. CASHIP_HST_201307.SUP). This file needs to be deleted in order to free more disk space and to optimize processing time.

Consider Purging Release History (iCARaS Manager Responsibility)

Purging of Release History can be automated by indicating the number of retention days in Trading Partner Options under Common File Maintenance.

Release History can also be manually purged.

Steps to perform:

1. Select **System Maintenance** from the main iCARaS menu.
2. Select **Purge Release History**.
3. Enter the criteria for purging.

NOTE: When Release History is purged, a file is created in the company directory that contains the purged data. The file created is date stamped with the year and month of the purge (i.e. CAREL_HST_201307.SUP). This file needs to be deleted in order to free more disk space and to optimize processing time.