

# iR\*EDI Clean-Up Procedures

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

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## Define Document Journal Options

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

### Steps to perform:

1. Select **Setup** from the main iR\*EDI menu.
2. Select **Document Journal**.
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.*

The screenshot shows the 'Document Journal Options Maintenance' window in the RADLEY CORPORATION application. The interface includes a navigation pane on the left with a tree view containing categories like 'Receive/Process Data', 'Send Documents', 'Document Maintenance', 'Integration Processing', 'Document Journal', 'Purchase Orders', 'View EDI Data', and 'Setup'. The 'Document Journal' sub-category is expanded. The main content area contains several input fields: 'Trading partner code:' (text box with 'TEST\_BUY'), 'Default record?' (text box with '1'), 'EDI standard:' (text box), 'Group:' (text box), 'Entity:' (text box), 'Receive/Send:' (text box), and 'Transaction set:' (text box). Below these fields are several dropdown menus for enabling or disabling various options: 'Enable document journaling?' (Yes), 'Archive received raw files?' (No), 'Archive received EDI files?' (Yes), 'Archive send EDI files?' (Yes), 'Archive send raw files?' (No), and 'Archive processing logs?' (No). At the bottom of the form are 'Add', 'Reset', and 'Cancel' buttons. The top of the window has 'View Alerts' and 'REDI' links, and the bottom has a footer note: 'Move the mouse over an object for information'.

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

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## Define Data Retention Period per Transaction

This allows you 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 **Setup** from the main **iR\*EDI** menu.
2. Select **Document Options**.
3. Enter the appropriate **“Trading partner code”** and **“Entity”**.
4. Advance to the **Loading** and/or **Transmission** tab.
5. Enter the number of days data should be retained for transactions that apply.

The screenshot shows the 'Trading Partner Document Options' window. The 'Transmission' tab is active, displaying a list of settings for document retention. The 'Trading partner code' is '0525CO' and the 'Entity' is blank. The settings include checkboxes for 'Send ASNs?', 'Send invoices?' (checked), 'Send POs?', 'Send product activity data?', 'Send price sales catalogs?', 'Send routing instructions request?', 'Send inventory adjustments?', and 'Send carrier shipment status?'. Each checkbox is followed by a 'Days to retain' field with a numeric input. At the bottom of the settings area are buttons for 'Update', 'Delete', 'Reset', and 'Cancel'.

**NOTE:** To manually purge transaction data, select **Document Maintenance** on the **iR\*EDI** menu, select the appropriate document, and then select the **Purge** option. Refer to the additional information below.

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# Manually Purging Document Maintenance

Each transaction set listed within the **Document Maintenance** folder contains a purge utility that can be used in addition to defining the number of days to retain transaction data within **Document Options** in the **Setup** folder. The manual purge utility can be used to remove certain documents from maintenance before the data is automatically purged, based on the entry in the “number of days to retain data” field.

## Steps to Perform:

1. Select **Document Maintenance** from the main **iR\*EDI** menu.
2. Select the transaction set that you wish to purge data from.
3. Select the **Purge** option and enter the appropriate purge criteria. Refer to the sample pictured below.

The screenshot displays the 'Purge Invoices - REDI' application window. The title bar includes 'RADLEY CORPORATION' and 'Company: REDI'. The navigation pane on the left shows a tree structure with 'Purge' selected under 'Invoices'. The main content area features a form with the following fields and buttons:

- Trading partner code:
- Starting trading partner entity:
- Ending trading partner entity:
- Starting invoice number:
- Ending invoice number:
- Buttons: Execute, Submit, Reset, Cancel

At the bottom of the window, there is a status bar with the text 'Enter or select the trading partner code'.

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## 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 **iR\*EDI** menu.
2. Select **Purge**.
3. Enter the criteria for purging. Refer to the sample pictured below.

The screenshot displays the 'Purge Document Journal Data' web application. The interface includes a navigation menu on the left with the following items: Receive/Process Data, Send Documents, Document Maintenance, Integration Processing, Document Journal (expanded), Detailed Report, Summarized Report, Inquiry/Update, View Data Files/Reports, Purge (selected), Export Inbound Integration Files, Purchase Orders, View EDI Data, Setup, and Scheduler. The main content area features a form with the following fields and controls: 'Trading partner code' (dropdown), 'Use transmission date?' (checkbox), 'Starting date' (calendar icon), 'Ending date' (calendar icon), 'Starting transmission number' (text input), 'Ending transmission number' (text input), 'Transmission type' (dropdown menu showing 'A11'), and 'Company code' (dropdown menu showing 'REDI'). At the bottom of the form are four buttons: 'Execute', 'Submit', 'Reset', and 'Cancel'. The top of the page shows 'RADLEY CORPORATION' and 'Purge Document Journal Data', and the bottom left has a prompt: 'Enter or select the trading partner code'.

**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.

# Purge iScheduler Job History

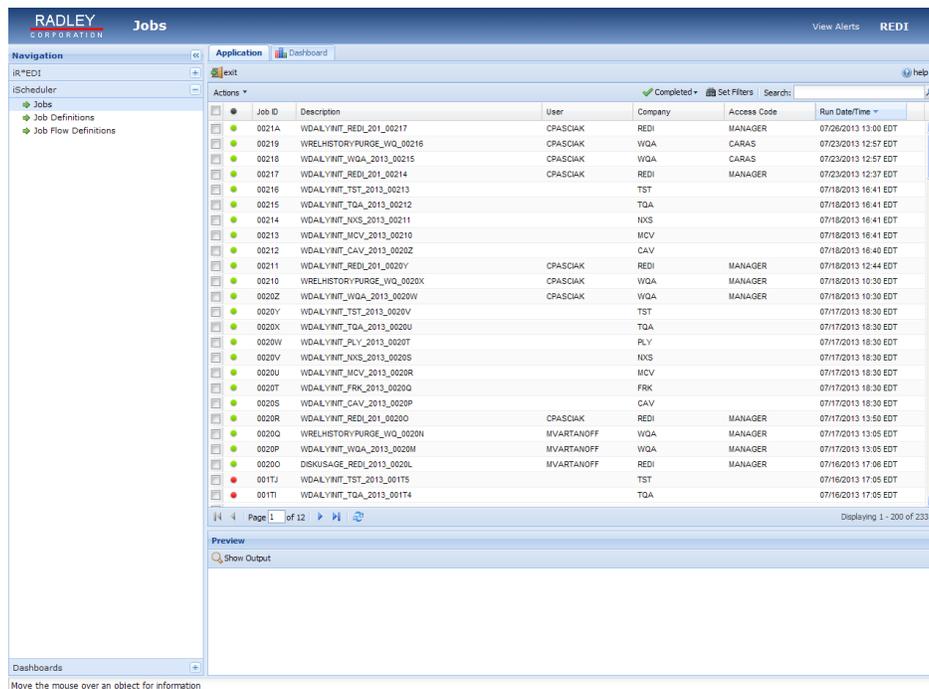
This function allows you to purge a range of completed jobs based on run date/time or specifically by job name, access code, or user name. Job history will build up quickly, so it's important to purge often to prevent file corruption.

**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 iR\*EDI 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.