Coffee Break & Learn: Tip of the Week – June 8, 2017

Unused Master Data? Run the Cleanup Wizard!

Available starting SAP Business One 8.82

Background

After several years of running SAP Business One, Jayson Butler (the manager of OEC Computers) has found that the company's database contains obsolete data. For example, he found several vendors from whom OEC Computers had stopped purchasing several years ago. He also found many sales items that have not been sold or produced in a few years. Jayson Butler would like to clean up OEC's unused master data in order to free up database space.

Cleanup Utility

Starting in SAP Business One version 8.82, you can use the Master Data Cleanup Wizard to remove or deactivate (make inactive) certain master data in Business One. When a cleanup run is complete, the selected data is permanently removed or deactivated from the database. Data with no underlying permanent transaction may be removed, wheras data with existing transactions (including closed or canceled documents) can only be deactivated.

The eight types of master data available for cleanup in the utility are:

- Items
- Business partners
- G/L accounts
- Project codes
- Distribution rules and cost centers
- Tax codes
- Employees

Preparation

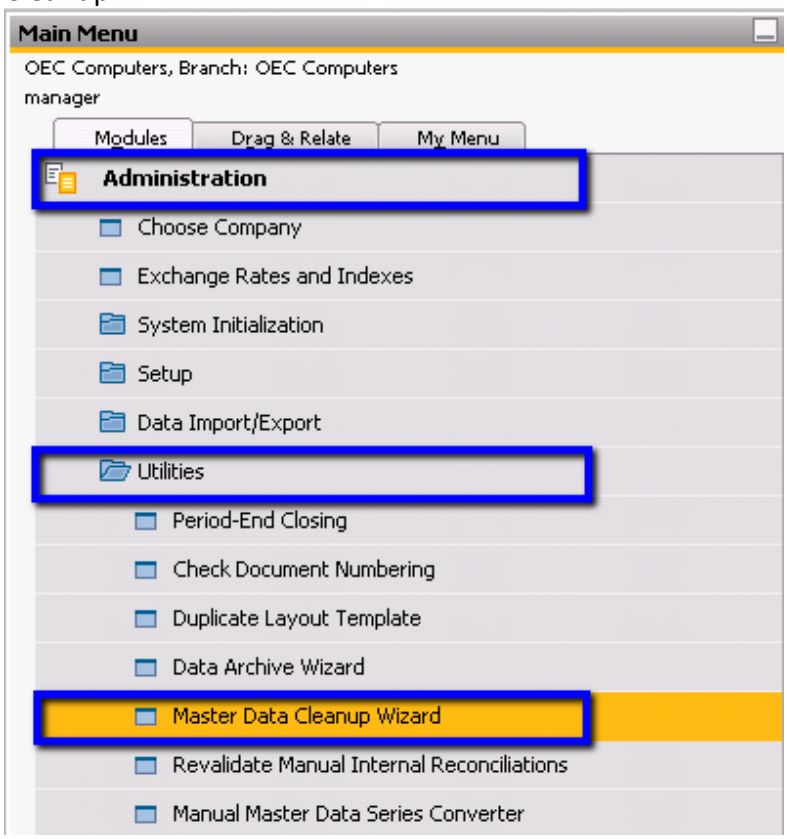
In order to prepare for a Master Data Cleanup Wizard run, you should:

1. Back up your company database. *Note: if you are a cloud customer, please send us a database backup request, and we will backup your database for you.*
2. Ensure no other users are connected to the SAP Business One application or database server.

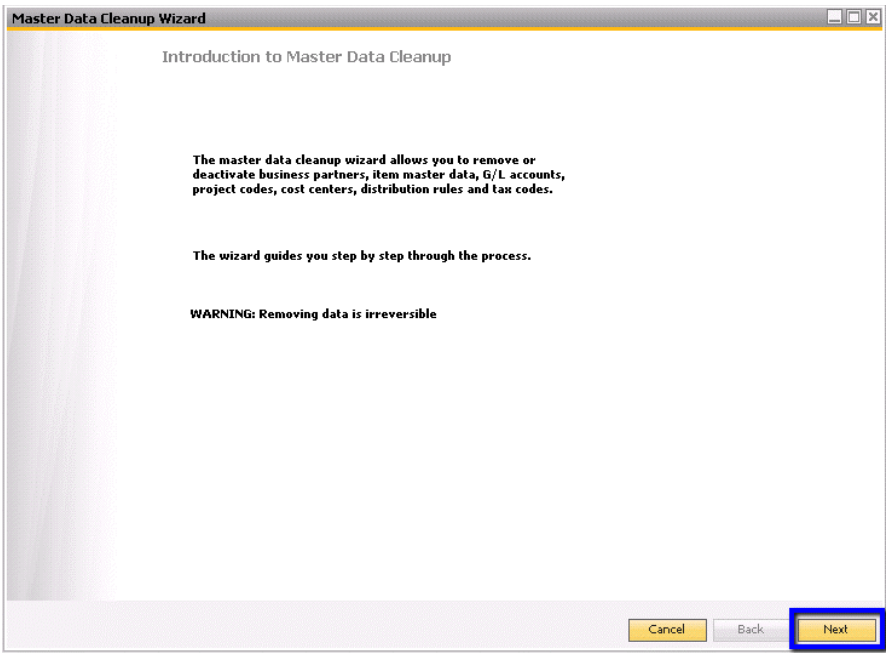
3. Close all open windows in the Business One Application.

Master Data Cleanup Wizard

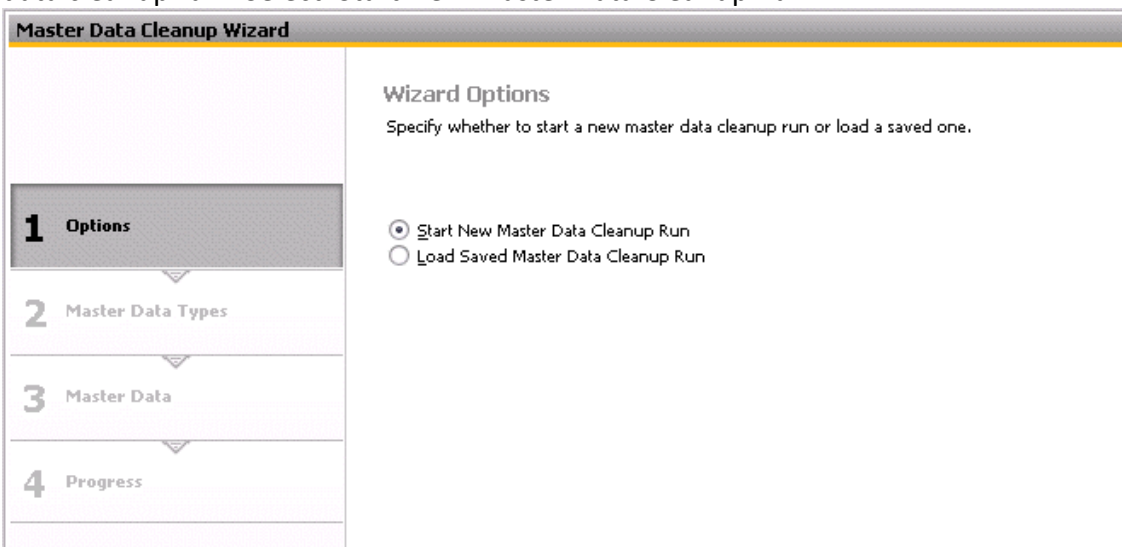
1. From the SAP Business One Main Menu, go to Administration > Utilities > Master Data Cleanup



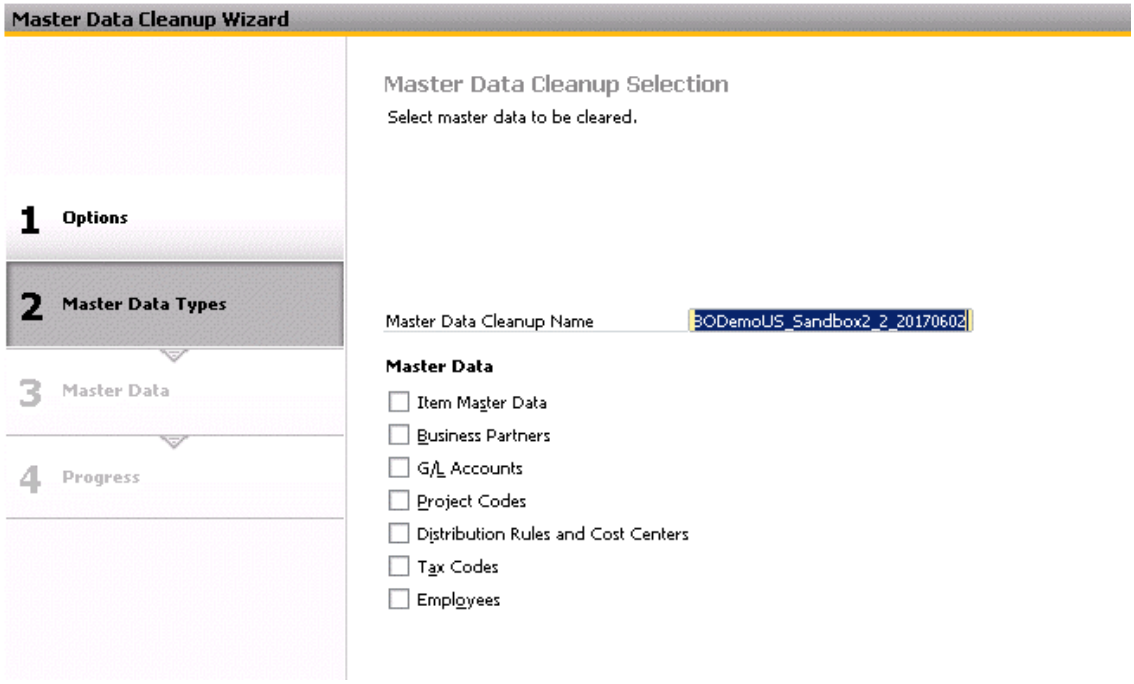
2. You will see an introduction to the master data cleanup. Click Next.



3. The Wizard gives you the option to start a new master data cleanup run or load a saves master data cleanup run. Select 'Start New Master Data Cleanup Run'.

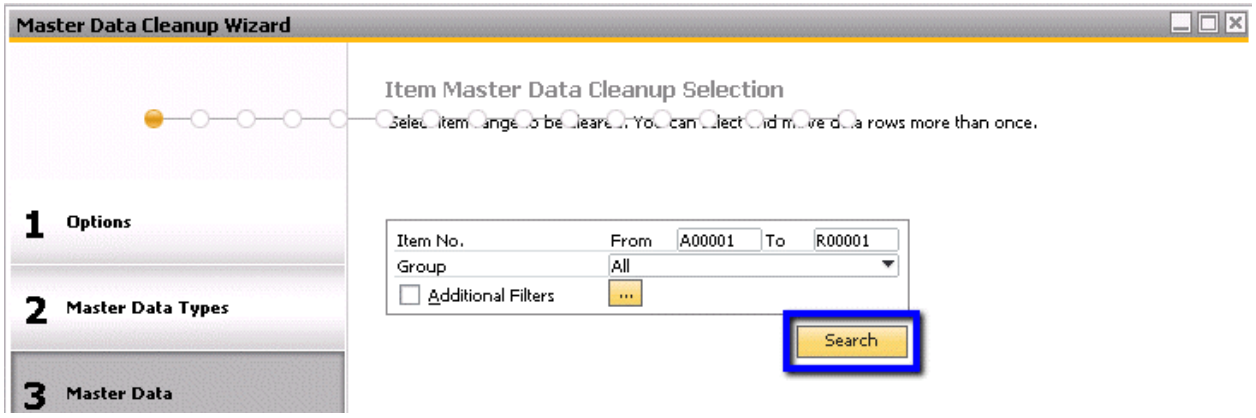


4. In the Master Data Types window, enter a Master Data Cleanup Name and data type selections. You will have the option of saving these selected parameters for a future cleanup run. The default cleanup name will be database will be *Database name_Data Cleanup Wizard run sequential no._run date*. When you select Business Partners or Employees, you will have the option to:
    a. Remove BP/Employee
    b. Deactivate BP/Employee
    c. Delete BP/Employee Content

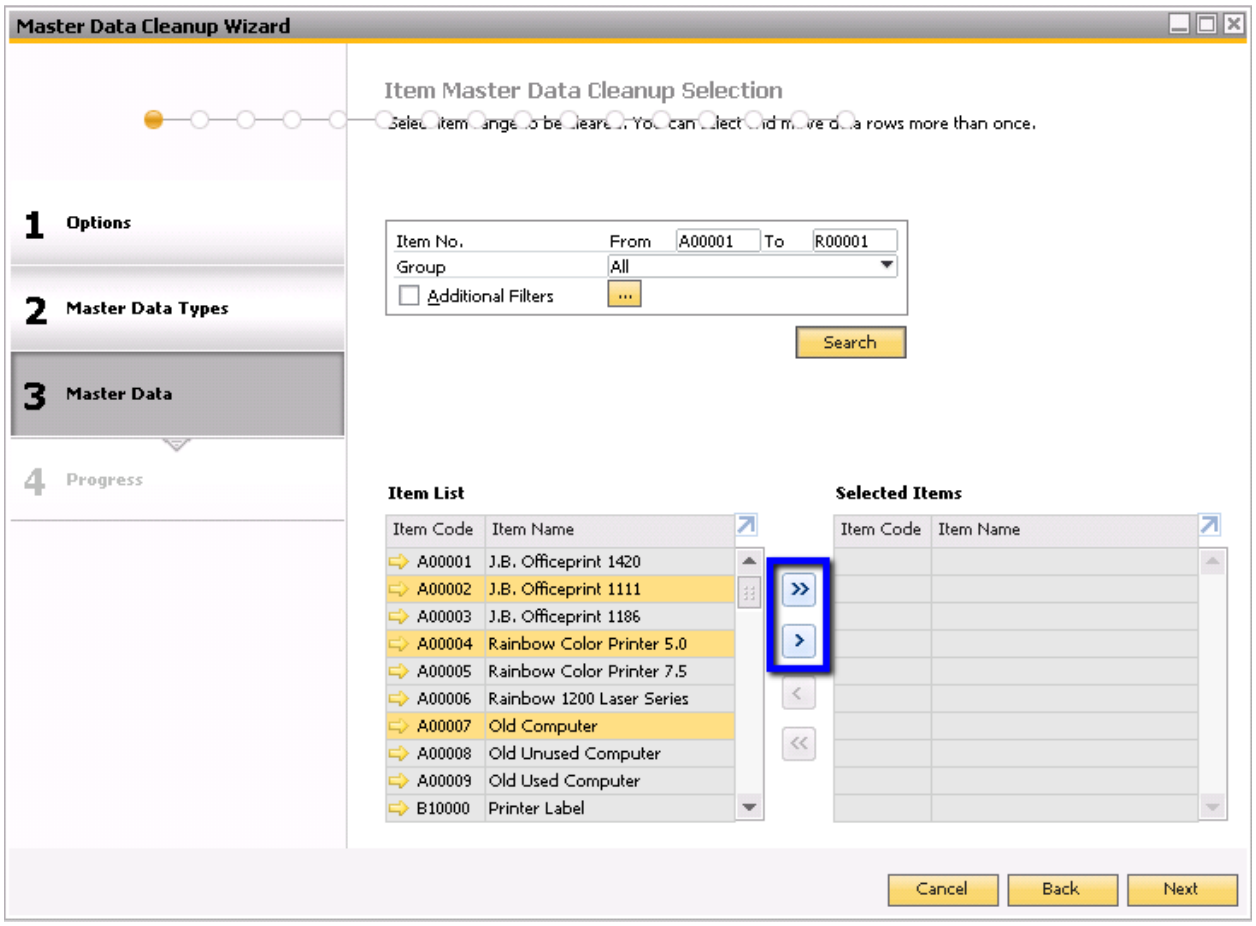


When you are satisfied with the selected parameters, click next.

5. For master data type, selection, you will see a Cleanup Selection screen. Select the range and click Search.

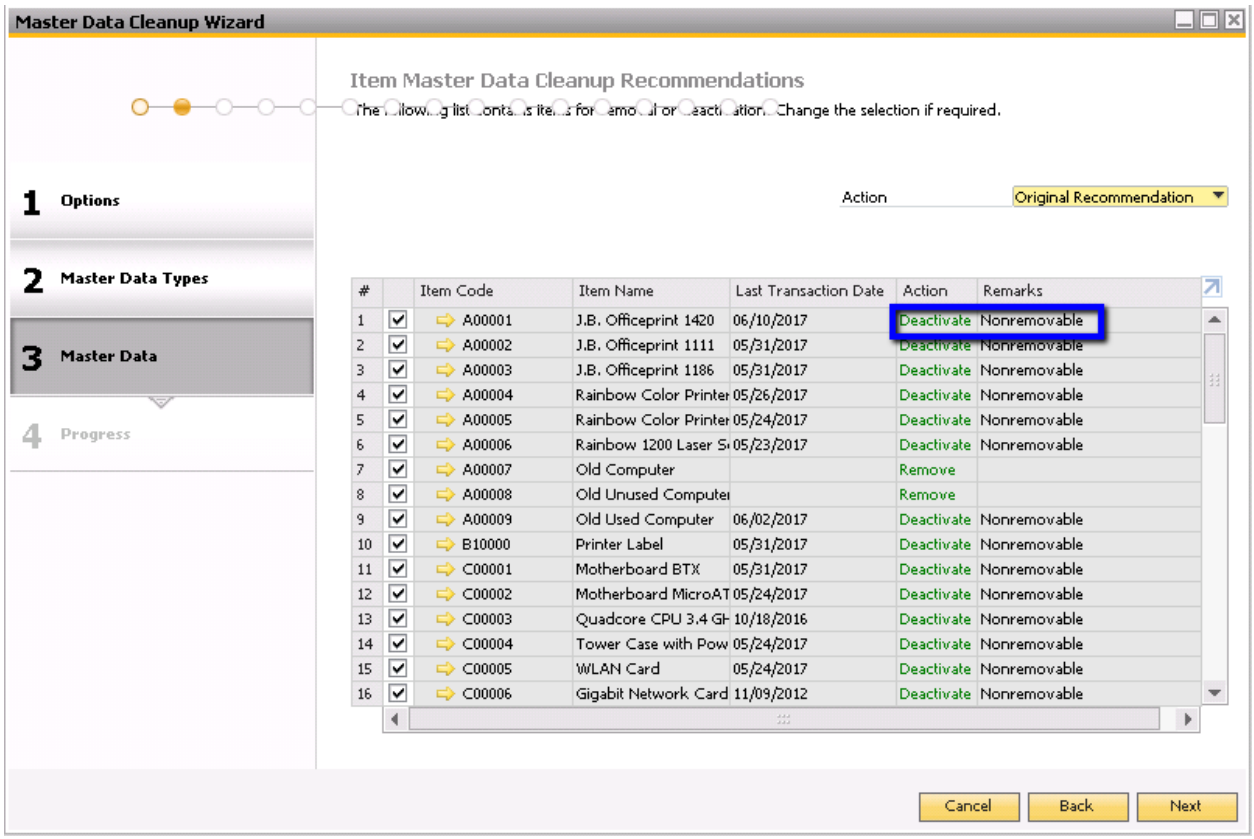


Clicking Search will generate a list within the specified range. You can select one or several and move to the Selected list by using the single > arrow, or move all in the list using the double >> arrow.

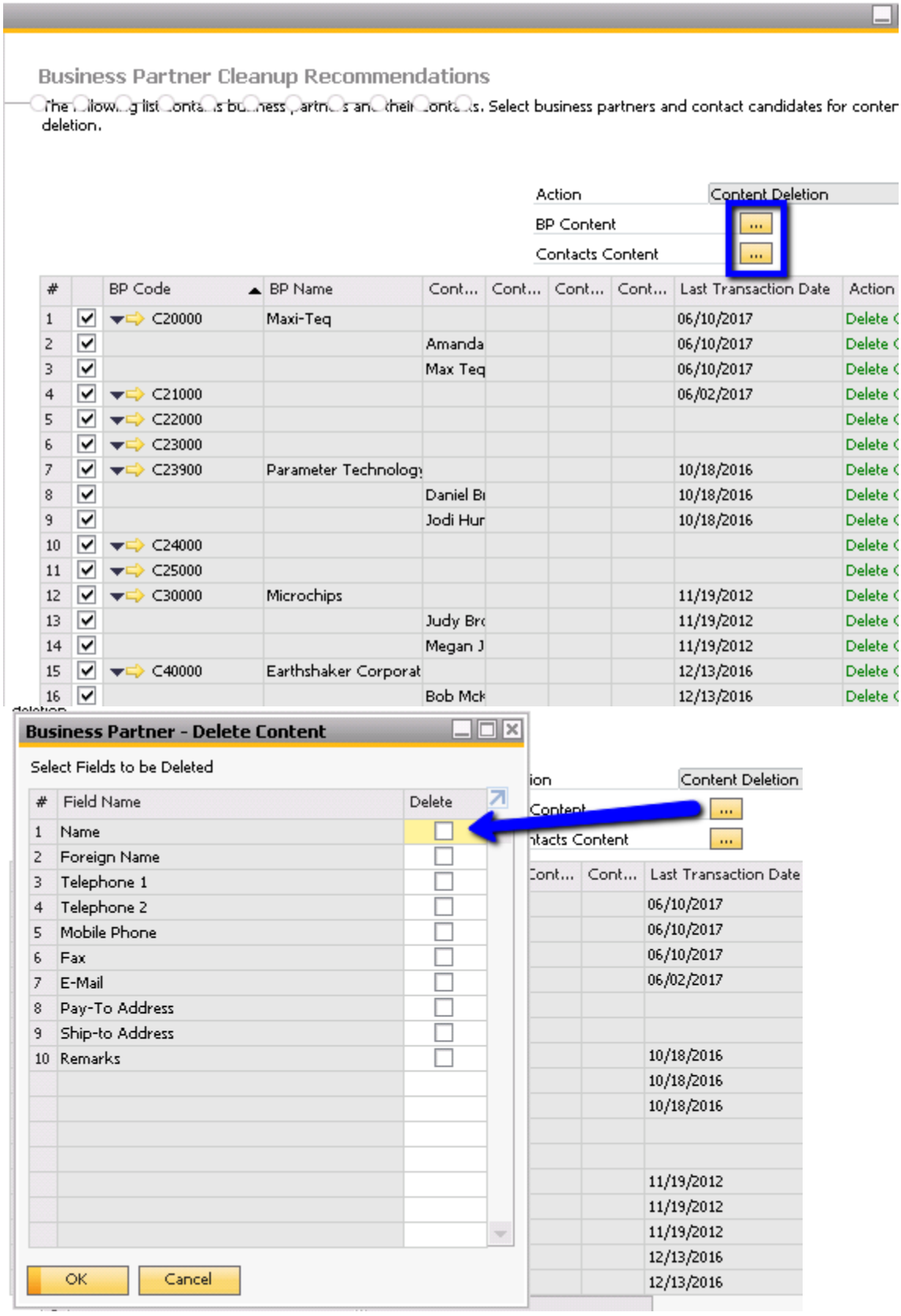


Once you are satistied with the selected list, click Next.

6. Following the Cleanup Selection screen for each data type, you will see a Cleanup Recommendations screen. Pay special attention to the Action and Remarks columns. If a data has permanent underlying transactions, it is not possible to remove. If you originally chose to remove the data type, the system will then recommend you to deactivate that nonremovable data instead.

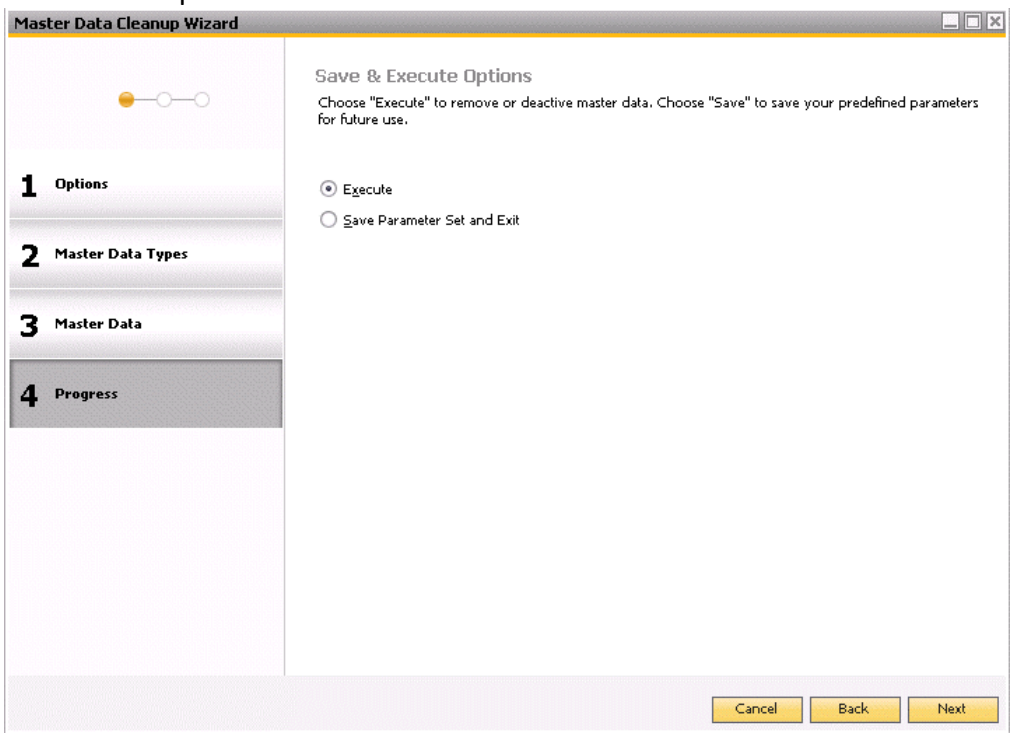


If you choose to delete the content of either BP or Employee Data types, you will have the option of choosing which content to delete:

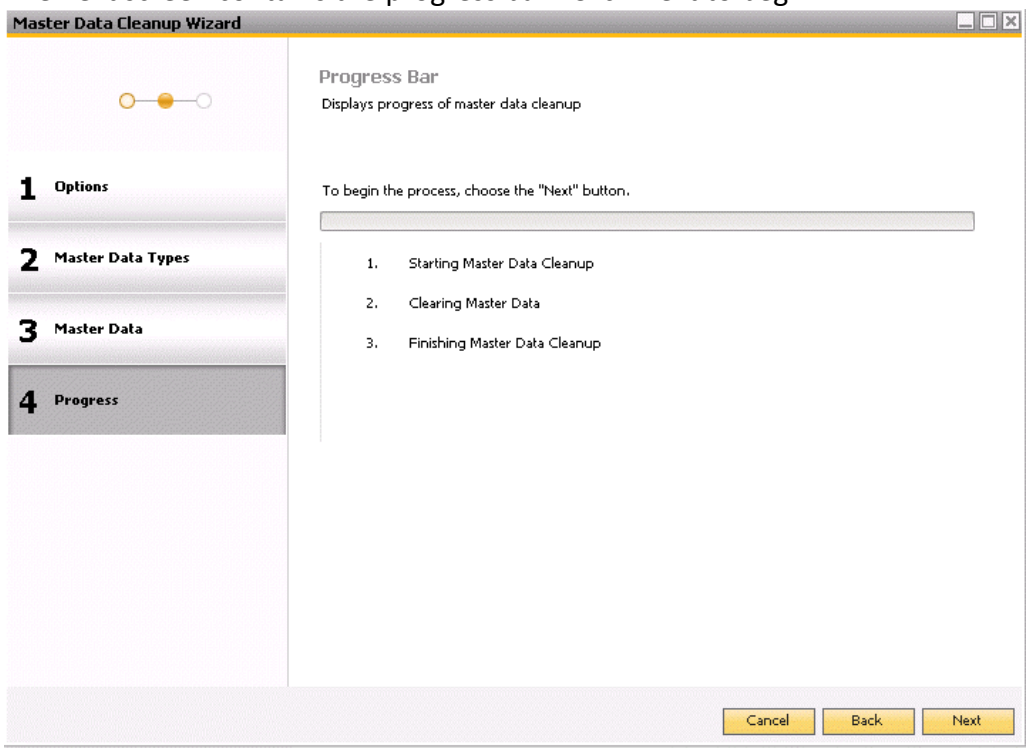


When you are satisfied with your selections, click Next.

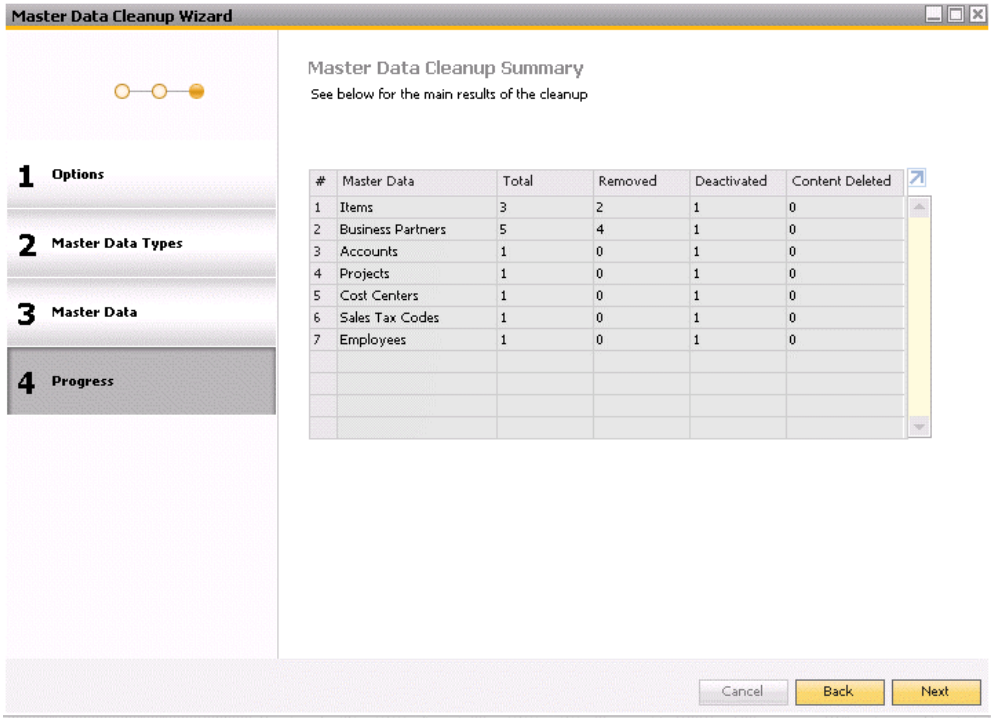
7. In the Save & Execute Options screen, you have the option to execute immediately or to save the selection parameters and exit. Click Next.



8. The next screen contains the progress bar. Click Next to begin.

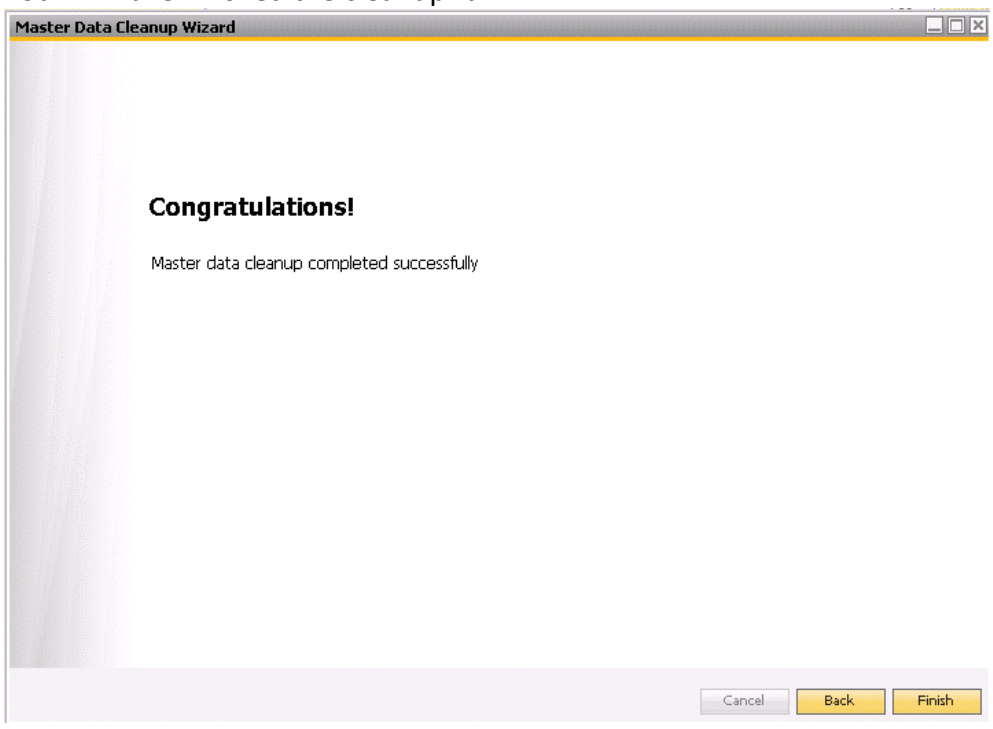


9. After the Master Data Cleanup has finished running, you will see the Master Data Cleanup Summary, which will display the total number cleaned up (removed, deactivated, content deleted).



Click Next.

10. You will have finished the cleanup run.



Click Finish.

Summary

The Master Data Cleanup Wizard can be used to remove or deactivate unused data, as well as remove the contents of business partner and employee master data. This is particularly useful in cases when you want to remove or deactivate a large number of data, such as when a master data import was done incorrectly or when an entire range of items becomes obsolete or out of style. Previously executed cleanup runs will be available for you to view in the Master Data Cleanup Wizard.

softengine.com

T: 818.704.7000

F: 818.884.3900

Warner Center Towers
21800 Oxnard Street
Suite 1060
Woodland Hills, CA 91367