



# J.F. Shea Co., Inc.

## How J.F. Shea used *Purge-it!* to successfully archive 30 years of data

Klik IT Product:  
***Purge-it!***

Business Sector:  
**Construction**

Discover how Klik IT combined their JD Edwards expertise with the flexibility of the *Purge-it!* Custom Module to deliver a bespoke Homebuilder archiving solution to J.F. Shea

### About J.F. Shea

J.F. Shea was started in 1881 when its founder, John Francis Shea, started a plumbing company in Portland, Oregon. The company expanded to become a major player in the heavy construction industry and participated in three of the country's top 10 construction and engineering achievements of the 20th century – the Hoover Dam, Golden Gate Bridge and Interstate Highway System. The company went on to further include industries from heavy construction to commercial real estate and homebuilding, making it one of the largest privately held construction companies in the nation.

Shea Homes is one of the top Homebuilders in the nation with over 105,000 units delivered since 1968 and averaging 3,000 units annually. Due to the growth of the company over the last 30 years, the company has generated and accumulated vast quantities of Homebuilder data in JD Edwards. It is primarily this Homebuilder data that lead J.F. Shea to Klik IT.

J.F. Shea began using a World version of JD Edwards in 1990 which included a new Homebuilder module. The company is currently on JD Edwards EnterpriseOne 9.2 and uses six *Purge-it!* modules: Accounts Payable, Accounts Receivable, Custom Module, Custom Module Extension pack, General Ledger, Purchasing.

### Background

Shortly after J.F. Shea implemented JDE World, it was decided that each division would have its own instance of JDE, resulting in 9 separate JDE environments. In 1998, J.F. Shea purchased another Homebuilder who was also using JDE Homebuilder and consolidated their data into the existing environments. In 2006, to prepare for upgrading to E1, J.F. Shea embarked on a project to consolidate all the JDE environments into a single instance and create data consistency going forward.

For some years, J.F. Shea had been looking for an end-to-end archiving solution that could tackle all their JD Edwards data. Despite numerous conversations with technology companies who work in the JD Edwards space, none had been able to meet the specific Homebuilder requirements outlined by J.F. Shea.

Genni White, Applications Development Manager, J.F. Shea, Inc. explained *"The volumes and disparate data we were dealing with at the outset were overwhelming."*

This case study details how Klik IT developed and built a Homebuilder archiving solution for J.F. Shea using the *Purge-it!* Custom Module.

*The volumes of data we were dealing with at the outset were overwhelming.*

## Selecting the right solution

1. J.F. Shea arranged discovery demos by three third party organizations who work in the JD Edwards data archiving space. The J.F. Shea team benchmarked each of the archiving products against an agreed set of criteria.

2. The company ruled out the archiving products that required a separate server due to possible increased complexity. Products built in RPG code were also excluded as they seemed much less flexible. Flexibility and ease of use were amongst the key selection criteria.

3. **Purge-it!** was selected because it is built into the E1 toolset and archived data can be easily accessed by users.

*“Overall, we found the solution to be uncomplicated both in terms of its ability to get the job done but also the dashboard interface that allows for straightforward viewing and monitoring of progress and developments across the JD Edwards environment.”* Genni White, Applications Development Manager, J.F. Shea, Inc.

## Getting started

The first step was to determine a **Data Retention Policy** which would provide the guidelines for both Archiving and Purging of data. J.F. Shea’s IT department sought guidance from the business on developing a company Data Retention Policy. Further clarification was taken, by the business, from legal experts. Considering the guidance and the fact that new homes are commonly covered by a 10-year builders’ warranty, it was decided that the **data would be kept for 14 years** from the community close out date. It was agreed upon that **Communities closed over 5 years** would be moved out of the production environment and into an Archive environment.

The project began with a series of meetings between J.F. Shea and Klik IT, with the clear aim of understanding, in detail, how the Homebuilder software was used by J.F. Shea. Following these meetings, a detailed data analysis exercise was carried out on the 30 years of Homebuilder data J.F. Shea had in their system.

The information gathered in the initial meetings combined with the data analysis work allowed Klik IT to propose relevant options and then design and build a customized solution within **Purge-it!** that responded directly to the company’s JD Edwards archiving needs.

## Addressing the challenges

### Categorizing the data

The first step in Homebuilder is setting up a “Community” in the Community Master before entering any remaining components, such as lots, plans, options, etc. The data analysis results indicated the need to base our archiving assumptions on the data in the Community Master.

The analysis showed there were **3244 Community Master F44H101 records**. Each community was examined and then categorized as ‘Good’, ‘Bad’ or ‘Orphaned’. SQL and Excel were used to perform this task.

### ‘Good’ and ‘Bad’ communities

A community with data in the Community Master and in all the following five tables was categorized as ‘Good’. A community that did not have data in all five tables was categorized as ‘Bad’.

- F44H201 Lot Master
- F44H301 Plan Master
- F44H401 Options Master
- F44H501 Sales Master
- F44H611 Bid Details

Note: Takeoffs were implemented in the last six years and were not included in our initial analysis.

The data analysis revealed **802 ‘Good’ Communities** and **2442 ‘Bad’ Communities**.

‘Good’ Communities that were completed and were more than five years old plus current fiscal year, were moved into an archive database. A separate EnterpriseOne archive environment was created so Users can access ‘Good’ Community data.

### ‘Orphaned’ communities

An ‘Orphaned’ community had data in at least one of the five tables above but with no corresponding Community Master record in F44H101. The data analysis revealed **8075 ‘Orphaned’ communities**.

‘Bad’ or ‘Orphaned’ Community data was moved to a secondary purge database. This data remains here for one year in case it needs to be reversed back into Production. No separate EnterpriseOne archive environment was created to allow Users access to this ‘Bad’ and ‘Orphaned’ data.

## Safety net for mistakes

Out of the thousands of Communities that were moved to the archive database, 10-15 Communities had to be moved back into Production.

In a scenario where too much data is moved into the archive, it is simple and fast to reverse. The data is returned to its original location in a matter of minutes, using the **easy reversal functionality** that is standard in the **Purge-it!** software.

Additional re-usable Custom Module schedules have been created for J.F. Shea to be able to reverse data from either the archive or purge databases.

## Incorporating automation into the plan

Three schedules have been created to run annually. These will be added to the Job Scheduler in Purge-it!

1. Schedule 1 deletes all data in the purge database (The Data Retention Policy states that this applies to data that has been in the purge database for 12 months)
2. Schedule 2 moves data, that is more than 14 years old, from the archive database to the purge database (where it will remain for 12 months)
3. Schedule 3 archives data from production, that is more than five years old, into the archive database.

## The results and timescales

The JD Edwards Users in J.F. Shea have experienced a **30% improvement in overall system performance** from archiving the Homebuilder data.

The company has recorded a **90% reduction in the quantity of data** in the Community Master F44H101 records from a starting point of 3244 records down to 335 records.

The project took three months from the first meeting through to completion of the Homebuilder archiving. 12 weeks may seem a long time, but, during this time, J.F. Shea has taken a huge number of **challenging decisions around categorizing data, data retention and archiving**. Notwithstanding that, the company has scoped out an entirely new Homebuilder archiving solution with **Purge-it!** Custom Module. J.F. Shea now has a JD Edwards Homebuilder archiving solution that delivers against business requirements and maintains data integrity.

*“This didn’t happen overnight, but the important point is we got it right!”* Genni White, Applications Development Manager, J.F. Shea, Inc.

The archiving was performed over two consecutive weekends. J.F. Shea deliberately chose weekends because they have iSeries triggers on some Homebuilder tables that needed to be turned off.

## Addressing concerns

*“Our only reservation was with Klik IT’s location in the UK and J.F. Shea being in California. We’ve had no issues at all. Honestly, it works to our benefit! While we are sleeping, the Klik IT team is working. We’ve found them to be very accommodating at every step of the project.”* Genni White, Applications Development Manager, J.F. Shea, Inc.

## A customized solution

Klik IT has written an application that allows the individuals at Community level to decide what to archive. There is pre-determined criteria and warning messages will be displayed so that users are prompted to confirm archiving requests. This puts the decision in the hands of the business at Community level.

## Next steps for J.F. Shea

*“We had to sort the Homebuilder data first before we could get to Purchasing.”* Genni White, Applications Development Manager, J.F. Shea, Inc. *“We’re very happy to have reached this point with the data – we’re thankful for all of Klik IT’s help and enthusiasm.”*

The mountain of Homebuilder data has been successfully moved. **Next, the plan is to tackle the data in the four other Purge-it! modules:** Purchase Orders, Accounts Payable, General Ledger, and Accounts Receivable for Shea Homes and the rest of J.F. Shea’s lines of businesses.

*We could envisage the Purge-it! solution shifting to the JD Edwards’ users with minimal disruption and effort*

*We knew we needed to find a solution for the Homebuilder data. If you have data for an inordinate amount of time, then you are running a risk.*

*We chose Purge-it! because it’s built into the E1 toolset. We liked the way we could easily access the archived data. Overall, we found the solution to be uncomplicated both in terms of its ability to get the job done but also the dashboard interface that allows for straightforward viewing and monitoring of progress and developments across the JD Edwards environment.*

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