

# Oracle Financial Services

## Data Housekeeping



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ORACLE®

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G17471-01

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# Contents

## 1 Get Help

---

1.1	Get Help in the Applications	1-1
1.2	Learn About Accessibility	1-1
1.3	Get Support	1-1
1.4	Get Training	1-1
1.5	Join Our Community	1-2
1.6	Share Your Feedback	1-2
1.7	Before You Begin	1-2

## 2 Data Housekeeping

---

2.1	Create Data Housekeeping Policy	2-2
2.1.1	Create Drop Partition Policy	2-3
2.1.2	Create Archive Policy	2-6
2.1.3	Create Delete Policy	2-9
2.2	Authorize a Policy	2-12

## Index

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# 1

## Get Help

### Topics:

- [Get Help in the Applications](#)
- [Learn About Accessibility](#)
- [Get Support](#)
- [Get Training](#)
- [Join Our Community](#)
- [Share Your Feedback](#)
- [Before You Begin](#)

### 1.1 Get Help in the Applications

Use Help icons to access help in the application.

Note that not all pages have Help icons. You can also access the [Oracle Help Center](#) to find guides and videos.

#### Additional Resources

- Community: Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the Partner Community, and other users.
- Training: Take courses on Oracle Cloud from [Oracle University](#).

### 1.2 Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

### 1.3 Get Support

You can get support at [My Oracle Support](#).

For accessible support, visit Oracle Accessibility Learning and Support.

### 1.4 Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## 1.5 Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the Partner Community. You can join forums to connect with other customers, post questions, and watch events.

## 1.6 Share Your Feedback

We welcome your feedback about Oracle Applications User Assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we did like to hear from you.

You can email your feedback to [My Oracle Support](#).

Thanks for helping us improve our User Assistance!

## 1.7 Before You Begin

Refer to following Documents:

- [See What's New](#)

# 2

## Data Housekeeping

The Data Housekeeping UI helps you to perform the followings tasks based on user defined criteria:

- Delete data from selected tables
- Drop partitions and truncate subpartitions from selected tables
- Archive the data from selected tables

You can use this as data retention in PBSM cloud services.

To open the Data Housekeeping screen, from the LHS menu, select **Data Management Tool**, and then select **Data Housekeeping**.

### Users and Roles

The following roles and functions are required to use the Data Housekeeping UI.

**Table 2-1 Roles and Role Names**

Role Code	Role Name	Function Code	Function Name
RLDHKANALYST	Data Housekeeping Analyst Role	DHKADD	Create Data Housekeeping Policy
		DHKRUN	Run Data Housekeeping Policy
		DHKDEL	Delete Data Housekeeping Policy
		DHKEDIT	Edit Data Housekeeping Policy
		DHKVIEW	View Data Housekeeping Policy
		DHKLOG	View Data Housekeeping Policy execution log
RLDHKAUTH	Data Housekeeping Authorizer Role	DHKAUTH	Authorize Data Housekeeping Policy
		DHKADD	Create Data Housekeeping Policy
		DHKRUN	Run Data Housekeeping Policy
		DHK	Delete Data Housekeeping Policy
		DHKEDIT	Edit Data Housekeeping Policy
		DHKVIEW	View Data Housekeeping Policy
		DHKLOG	View Data Housekeeping Policy execution log

Table 2-1 (Cont.) Roles and Role Names

RLDHKAUDIT	Data Housekeeping Auditor Role	DHKVIEW	View Data Housekeeping Policy
		DHKLOG	View Data Housekeeping Policy execution log

### Data Housekeeping Summary

#### Search Policy

**Prerequisites:** Predefined Policy

To search for a Policy:

1. You can search a policy is through the **Search** drop-down option. Select **Policy Name**, **Policy Type**, **Seeded Policy Flag**, **Last Execution Status**, and **Created By** from **Search** drop-down.
2. Enter the **Policy Name**, **Policy Type**, **Seeded Policy Flag**, **Last Execution Status**, and **Created By** in Search Criteria and click **Go**.

Rows that contain the string you are searching for are fetched and displayed in the Data Housekeeping Summary.

The Data Housekeeping Summary displays the following information:

**New Policy:** Click the New Policy icon on the page header to build a new policy.

- **Name:** The policy name.
- **Schedule:** Shows the time when the policy is scheduled.
- **Type:** The Type (Archive, Drop Partition, Delete) of the policy.
- **Seeded Policy Flag:** Shows the type of policy as **Yes** if the policy is seeded.
- **Last Run Date:** The Date and Time when the policy was last modified.
- **Created Date:** the date when policy was created.
- **Last Execution Status:** The status of policy after execution.
- **Actions:** Click this icon to view a list of actions that you can perform on the Policy.
  - **View:** View existing policy.
  - **Edit:** Edit existing policy. To edit a rule, you must have Read/Write privilege.
  - **Authorize:** Select Authorize to approve the policy for execution.
  - **Withdraw Jobs:** Select Withdraw Jobs to cancel the Job execution.
  - **View Log:** Select View Log to view the audit information of the policy. This information includes pending and running jobs.
  - **Delete:** You can delete policies that you no longer require. Note that only policy owners and those with Read/Write privileges can delete Policies. A policy that has a dependency cannot be deleted. A policy cannot be retrieved after deletion.

## 2.1 Create Data Housekeeping Policy

To create a new Data Housekeeping policy, follow these steps:

1. Navigate to the **Data Housekeeping Summary** Page.
2. Click the **New Policy** icon. The **Create Data Housekeeping** Page is displayed.
3. Click **Start** to create a new policy.
4. Enter the required details and Submit.

Below are the supported Policy Types:

- [Create Drop-Partition Policy](#)
- [Create Archive Policy](#)
- [Create Delete Policy](#)

## 2.1.1 Create Drop Partition Policy

This section provides the details on dropping the partition data from selected tables based on user defined criteria.

To create Drop Partition Policy, follow these steps:

1. Navigate to **New Policy** page.
2. Follow the steps mentioned in below sections:
  - a. **Step 1:** Policy Definition
  - b. **Step 2:** Selection
  - c. **Step 3:** Condition

### Note:

This section is not applicable to **Drop Partition** policy type.

- d. **Step 4:** Preview and Submit

### Step 1: Policy Definition section

1. From **Policy Details** tab, click **Start**. The **Policy Definition** page is displayed.

**Figure 2-1 Policy Definition section**

The screenshot displays the 'Policy Definition' section of the Oracle Data Housekeeping interface. On the right, a vertical sidebar titled 'Policy Steps' shows four steps: 'Policy Definition' (selected and highlighted in blue), 'Selection', 'Condition', and 'Review and Submit'. The main content area is titled 'Policy Definition' and includes the instruction 'Choose a policy name, supply a description, Action, and set a scheduled date'. The form contains the following fields:

- Policy Name:** A text input field with a 'Required' label.
- Policy Description:** A larger text input field with a 'Required' label.
- Policy Type:** A section with three radio button options: 'Drop Partition', 'Archive', and 'Delete'. The 'Drop Partition' option is selected. A 'Required' label is present.
- Policy Execution Date:** A date input field with a calendar icon and a 'Required' label.

At the bottom right of the form, there are three buttons: 'Cancel', 'Clear', and 'Continue'.

2. Enter the following details:
  - **Name:** Name of Policy
  - **Description:** Description of Policy
  - **Type:** Type of Policy as Drop Partition
  - **Policy Execution Date:** Select the execution date and time of policy using calendar
3. Click **Continue**.

### Step 2: Selection section

1. Navigate to the **Selection** section. The **Selection** window is displayed to define the partitions.
2. Select the **Partition type** as **Drop Partition** or **Truncate Subpartition**.
  - a. If **Partition type** is selected as **Drop Partition**, then following window is displayed:

**Figure 2-2 Partition type as Drop Partition**

Policy Steps

### Selection

Define the detailed policy steps to execute

Policy Name	Policy Description	Policy Type	Policy Execution Date
New123	New123	DROP	07/03/2024 10:45 ASA/KOLKATA IST

**Select**

Choose partitioning type

☒ Drop Partition ☐ Truncate SubPartition

Table Name: FSLD\_ACCOUNT\_INDEX\_HIST

Partition Name: SYS\_P2640 - 10/10/2015 X

**Partition Details**

Table Name	Partition Name	Partition High Value	Partition Column Name
FSLD_ACCOUNT_INDEX_HIST	SYS_P2640	TO_DATE('2015-10-10 00:00:00', 'YYYY-MM-DD HH24:MI:SS', 'NLS_CALENDAR=GREGORIAN')	AS_OF_DATE

1 - 1 of 1

Cancel Discard Save Continue

- b. Select the table(s) for which you want to do the partitions. The list of available partitions is displayed that contain data.
- c. Select the Partition Name. Partition Name shows the partition of the selected table from the database.  
The Partition details will be displayed in Partition Details section. This shows the Table Name, Partition Name, column name and metadata on which partition is created. This doesn't show empty partitions.
- d. Click **Continue**.
- a. If **Partition type** is selected as **Truncate Subpartition**, then following window is displayed:

**Figure 2-3 Partition type as Truncate Subpartition**

- b. Select the table(s) for which you want to do the sub partitions. The list of available sub partitions is displayed that contain data.
- c. Select the Sub Partition Name. Sub Partition Name shows the columns and metadata on which sub-partition has been created.  
The Sub Partition details will be displayed in Subpartition Details section. This shows the Table Name, Subpartition Name, column name and metdata on which partition is created. This doesn't show empty partitions.
- d. Click **Continue**.



**Note:**

If only sub-partition is selected to remove then only data from it will deleted. Sub-partition is not dropped to enable customer re-load data in it, if needed. Sub-partitions in PBSM data model is created with a pre-defined list.

3. Click **Continue**.

**Step 3: Preview and Submit section**

1. Navigate to **Preview and Submit** section. Review the policy details.

**Figure 2-4 Preview and Submit section**

Policy Steps

### Review and Submit

Confirm all details before submitting

Policy Name: New123 | Policy Description: New123 | Policy Type: DROP | Policy Execution Date: 07/23/2024 10:45 ASIA/KOLKATA IST

**Partition / Sub-partition Details**

Scheduled Time	Table Name	Partition Name	Subpartition Name	Status	Created By
	FSI_D_ASSET	SYS_P3004 - 04/02/20...		SAVED	CFEQA

Total 1

Cancel Discard Submit

Policy Definition Selection Condition Review and Submit

2. Click **Submit** to create the policy. The created policy will be displayed on **Data Housekeeping Summary** page.

## 2.1.2 Create Archive Policy

This section provides the details on archiving the data from selected tables based on user defined criteria.

To create Archive Policy, follow these steps:

1. Navigate to **New Policy** page.
2. Follow the steps mentioned in below sections:
  - a. **Step 1:** Policy Definition
  - b. **Step 2:** Selection
  - c. **Step 3:** Condition
  - d. **Step 4:** Preview and Submit

### Step 1: Policy Definition section

1. From **Policy Details** tab, click **Start**. The **Policy Definition** page is displayed.

**Figure 2-5 Policy Definition section**

2. Enter the following details:
  - **Name:** Name of Policy
  - **Description:** Description of Policy
  - **Type:** Type of Policy as Archive

## Step 2: Selection section

1. Navigate to the **Selection** section.

**Figure 2-6 Selection section**

2. Select Table which you want to archive from **Select Table for Archive or Delete** drop-down.
3. Select the policy execution date and time of policy using **Policy Execution Date** calendar
4. Click **Continue**.

## Step 3: Conditions

This section allows you to define the conditions(s) to archive the table.

1. Navigate to the **Conditions** section.

**Figure 2-7 Conditions section**

Policy Steps  
Conditions  
Define the detailed policy steps to execute

**Policy Details**

Policy Name: New123 | Policy Description: New123 | Policy Type: ARCHIVE | Policy Execution Date: 07/23/2024 14:00 ASIA/KOLKATA IST

**Select Columns**

Selected Table: FSI\_D\_ACCOUNT\_RATE\_TIERS

**Choose Filters**

Filter Column: ACCOUNT\_NUMBER | Clause Name: equals

Value: 1001

Filter Column	Clause Name	Text Value	Date Value	Number Value

1 rows selected | Total 1

Cancel | Discard | Clear | Save | Continue

3 | 4

Policy Definition ☒

Selection ☒

**Condition**

Review and Submit

2. Select the column(s) using filter.
3. Select operator from **Clause Name** drop-down. The list of operators displays based on the selected Column Name.

**Note:**

You must select at least one condition to avoid the full table archive. Use AND if you want to use multiple columns. You can select columns from pre-defined list. Don't use wild card characters. Supported operators are: >, <, <=, and >=.

4. Enter condition value for selected column.  
For example, If you have selected **Column** as **Account Number**, then select **Equals** operator from **Clause Name** drop-down, and enter alphanumeric value in **Value** field.  
To add more conditions, define the condition and click **Save**.
5. Click **Continue**.

**Step 4: Preview and Submit section**

1. Navigate to **Preview and Submit** section. Review the policy details.

**Figure 2-8 Preview and Submit section**

Policy Steps

### Review and Submit

Confirm all details before submitting

Policy Name	Policy Description	Policy Type	Policy Execution Date
New123	New123	ARCHIVE	07/23/2024 13:45 ASIA/KOLKATA IST

**Condition Details**

Table Name	Affected Records Count	Conditions	Status
FSLD_ACCOUNT_...	0	ACCOUNT_NUMBER = '1001'	SAVED

1 - 1

Cancel Discard Submit

4 | 4

- Policy Definition
- Selection
- Condition
- Review and Submit

2. Click **Submit** to create the policy. The created policy will be displayed on **Data Housekeeping Summary** page.

 **Note:**

Data that is archived remains in the same table but is invisible to user. Thus, they cannot be inserted back as it will violate unique constraint of concerned table.

## 2.1.3 Create Delete Policy

This section provides the details on deleting the data from selected tables based on user defined criteria.

To create Delete Policy, follow these steps:

1. Navigate to **New Policy** page.
2. Follow the steps mentioned in below sections:
  - a. **Step 1:** Policy Definition
  - b. **Step 2:** Selection
  - c. **Step 3:** Condition
  - d. **Step 4:** Preview and Submit

### Step 1: Policy Definition section

1. From **Policy Details** tab, click **Start**. The **Policy Definition** page is displayed.

**Figure 2-9 Policy Definition section**

Policy Steps

### Policy Definition

Choose a policy name, supply a description, Action, and set a scheduled date

Policy Name Required

Policy Description

Policy Type

Drop Partition Archive Delete

Policy Execution Date Required

Cancel Clear Continue

1 | 4

Policy Definition

Selection

Condition

Review and Submit

- Enter the following details:
  - Name:** Name of Policy
  - Description:** Description of Policy
  - Type:** Type of Policy as **Delete**

## Step 2: Selection section

- Navigate to the **Selection** section.

**Figure 2-10 Selection section**

Policy Steps

### Policy Definition

Choose a policy name, supply a description, Action, and set a scheduled date

Policy Name Required

Policy Description

Policy Type

Drop Partition Archive Delete

Select Table for Archive or Delete

FSI\_D\_ACCOUNT\_INDEX\_HIST

Policy Execution Date Required

Cancel Clear Continue

1 | 4

Policy Definition

Selection

Condition

Review and Submit

- Select Table which you want to Delete from **Select Table for Archive or Delete** drop-down.
- Select the policy execution date and time of policy using **Policy Execution Date** calendar
- Click **Continue**.

## Step 3: Conditions

This section allows you to define the conditions(s) to Delete the table.

1. Navigate to the **Conditions** section.

**Figure 2-11 Conditions section**

Policy Steps

### Conditions

Define the detailed policy steps to execute

#### Policy Details

Policy Name	Policy Description	Policy Type	Policy Execution Date
New1234	New1234	DELETE	07/24/2024 09:45 ASIA/KOLKATA IST

**Select Columns**

Selected Table  
FSI\_D\_ACCOUNT\_INDEX\_HIST

**Choose Filters**

Filter Column: ACCOUNT\_NUMBER

Clause Name: equals

Value: 1001

Filter Column	Clause Name	Text Value	Date Value	Number Value

1 rows selected

Cancel Discard Clear Save Continue

3 | 4

Policy Definition ✓

Selection ✓

**Condition**

Review and Submit

2. Select the column(s) using filter.
3. Select operator from **Clause Name** drop-down. The list of operators displays based on the selected Column Name.

**Note:**

You must select at least one condition to avoid the full table Delete. Use AND if you want to use multiple columns. You can select columns from pre-defined list. Don't use wild card characters. Supported operators are: >, <, <=, and >=.

4. Enter condition value for selected column.  
For example, If you have selected **Column** as **Account Number**, then select **Equals** operator from **Clause Name** drop-down, and enter alphanumeric value in **Value** field.  
To add more conditions, define the condition and click **Save**.
5. Click **Continue**.

#### Step 4: Preview and Submit section

1. Navigate to **Preview and Submit** section. Review the policy details.

**Figure 2-12 Preview and Submit section**

Policy Steps

### Review and Submit

Confirm all details before submitting

Policy Name	Policy Description	Policy Type	Policy Execution Date
New1234	New1234	DELETE	07/24/2024 09:45 ASIA/KOLKATA IST

**Condition Details**

Table Name	Affected Records Count	Conditions	Status
FSLD_ACCOUNT_...	0	ACCOUNT_NUMBER = '1001'	SAVED

1 - 1

Cancel Discard Submit

4 | 4

Policy Definition ✓

Selection ✓

Condition ✓

Review and Submit

2. Click **Submit** to create the policy. The created policy will be displayed on **Data Housekeeping Summary** page.

## 2.2 Authorize a Policy

To authorize a policy, follow these steps:

Predefined Data Housekeeping Policy

1. Navigate to the **Data Housekeeping Summary** page
2. Search for a policy that you want to authorize. For further information, see the [Data Housekeeping Summary](#) section
3. Click on the **Action** icon against the policy name and select **Authorize**.

Data Housekeeping policy gets executed on scheduled date and time after authorization. It runs automatically at the defined date and time which was set during the policy creation.

# Glossary

# Index