The Four Most Common Mistakes in SAP RE-FX / ILM Archiving Projects

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1. Introduction

SAP RE-FX is among the most intricate modules in the SAP landscape due to its deep integration with FI, CO, PM, PS, MM, and FI-CA. In many organisations it also connects to external platforms: CAFM or GIS systems, or custom extensions. Each connection represents a real operational dependency. Lease contracts, asset structures, space utilisation, and cost allocation are not just data; they are reflections of business reality.

This depth makes RE-FX powerful, but it also magnifies risk. What seems a straightforward SAP procedure for archiving often unravels into a web of legacy configurations and deep-rooted connections via Z-programs and APIs. **Bute Archiving in RE-FX is never purely technical; it is organisational, legal, and political.**

Too often, however, the topic is treated as a background task—something that can wait, be delegated, or "handled later." That assumption is costly.

This paper highlights **four recurring mistakes** in SAP archiving with focus on RE-FX and ILM. The first two describe challenges common to almost all major modules. The third and fourth address issues specific to RE-FX and ILM, disciplines that are particularly relevant for real-estate and asset-intensive organisations. Across all four, the same pattern repeats: structural misconceptions that quietly erode compliance, budgets, and credibility long before a single byte is deleted. Each section outlines the underlying cause, the systemic risk it creates, and the mindset required to correct it.

2. The Risk of Waiting: Why "Later" Is the Most Expensive Option

Archiving rarely reaches the board agenda. It adds no revenue, lifts no KPI, and earns little recognition. What it does secure is stability: documented retention, predictable data growth, and a controllable HANA spend. Few advocate invisible outcomes, and the topic feels about as glamorous as tidying the attic.

Inside the organisation, every function finds a reason to wait. **Marketing** keeps historical data "for context." **Customer Service** keeps old contracts. **Legal** hesitates to delete potential evidence but also worries about DSG/GDPR compliance.

Individually sound positions create collective standstill. Months pass, data piles up. The supposed prudence of waiting later returns as higher HANA invoices, tougher audits, and compliance requests demanding documentation.

A frequent detour is the **HANA Easy Fix** during Greenfield or Bluefield transformations: migrate selectively and keep a read-only legacy. It looks neat in slides but usually preserves cost and governance exposure instead of solving them.

A practical route is quiet and early. Formalise archiving as a defined initiative — add pre-discussions with competent Stakeholders and Deciders , do not communicate it as a side task. Start informally: gather perspectives and interest. Then move to clarity later — slowly introduce technical ILM-terms – setting of retention windows etc. Publish them as governance, hold short decision meetings with the few stakeholders who must approve.

Execute, measure, extend. Repeat. **Iterations are precious at this task.**

Archiving may never draw applause. But it reduces exposure and brings cost predictability — before external triggers force a hurried, expensive response.

3. The Decision Dilemma: Iterative, Not Waterfall & Hard Stop

Once management acknowledges that archiving can no longer be postponed, the real strategic work begins. In favor of all executives avoiding it: archiving only reached the current level of urgency & importance " within the last decade — driven less by strategy than by technical and legal circumstance. What is worth mentioning: this decision cannot follow a simple sequence of Decision → Execution → Closure. It requires **iterative clarification** — but with a defined endpoint. Making this decision or enabling it is actually partly **pioneer`s work**.

The default error is immediate once action is finally acknowledged: responsibility shifts to Legal and IT. The reasoning appears sound — Legal defines what must be deleted, IT implements how. In practice, both operate in isolation. Legal lacks visibility of data structures and system usage; IT lacks fluency in jurisdictional terms, wording AND thinking. Each acts correctly within its own frame, yet together they create standstill. Delegation in this form does not solve the problem; it formalises it.

Option 1 — Define the Purpose Yourself

Executive ownership starts by naming the dominant objective:

- ☑ Compliance: GDPR/DSG-conform retention with automated deletion.
- ☑ Cost control: reducing HANA volume to stabilise storage and licence spend.
- ☑ System exit: decommissioning with lawful audit access retained.

These drivers are mutually exclusive in emphasis. Mixing them without ownership yields contradictory rules, duplicated work, and delay. "Neutral" archiving fails because neutrality does not exist: each design choice privileges one dimension. If Legal dominates, efficiency erodes; if IT dominates, the legal shield weakens.

The problem with Option 1 (explicit).

Making a sound executive choice is hard without accurate Legal and IT input — and in reality:

- ☑ SAP ILM is rarely a core priority for the SAP team unless you have a standing ILM expert.
- ☑ DSG/GDPR is often treated by Legal as "outsourcable" hygiene, pushed to externals as a low-prestige task.

Result: leaders hesitate, iterations loop, no decision.

What it takes. A bounded personal dive is usually worth it. Allocate real attention (days, not hours), set the purpose, and close. Done correctly, you remove the topic from your agenda for ~10 years. The paradox: long-horizon outcomes earn little applause; the better you do, the less visible the success. That is the real dilemma of Option 1.

Option 2 — Delegate, but at the Right Level

If leadership will not steer directly, it must still define boundaries and translation: Establish a governed triad: **Legal, IT, Finance/Operations** under explicit executive mandate. Finance/Operations anchors cost realism and process continuity, Legal and IT supply constraints. Leadership oversees comprehension, not content: Legal must understand data lineage; IT must understand legal consequence. If both leave a meeting smiling, nothing has been decided.

Residual issue (explicit). The Option-1 problem does not disappear. Without someone at C-level investing deep comprehension time (personally or via a truly empowered delegate), translation gaps persist and decisions stall.

Executive test of maturity. Not consensus, but clarity: who decides, on what basis, with which evidential trace, by which date. Archiving, done properly, is not a compliance ritual; it sets cost, credibility, and stability for the next decade.

4. Budgeting by Hope, Not by System Depth

If the Decision are made, people and interest aligned, still most RE-FX archiving budgets collapse before the first test run. Not because of poor technology but because of poor assumptions. Managers could fall for the trap to imagine a brief technical clean-up after all the decision work was so long - assign a few consulting days, and call it done. Then reality begins to unfold.

Budgets fail for predictable reasons. First, manpower: organisations plan for one consultant and end up needing five minds—a RE-FX specialist, an ILM rule architect, a developer, and a project lead who can bridge business and compliance. Even small systems require early involvement of business users and legal advisors; archiving is less a technical exercise than a negotiation of accountability.

Second, system complexity: RE-FX might be tightly woven into BW, PM, MM, PS and countless Z-tables and exits. Some "inactive" contract or asset link to something still active. The first deletion simulation often uncovers a decade of undocumented logic.

Third, zero buffer: projects plan for ideal outcomes and ignore the friction of reality. Legal holds, audit reviews, and interface fixes all take time. Without margin for error, each finding turns into a delay—and each delay into a cost spiral.

A sustainable project follows a simple rule: know your system, know your people, budget realistically, add a buffer, then get help. External expertise is not a cost—it is insurance against rework. Every productive ILM run costs less than cleaning up one failed test. Plan accordingly or watch your "optimization" turn into a permanent cost centre.

5. Not Pulling It Through: The Half-Finished Project Trap

There is nothing more damaging than a half-finished ILM project. A paused deletion run, an untested retention rule, or an undocumented exception becomes technical debt with legal implications. Many organisations begin energetically, realign midway, and quietly lose momentum. Two years later, a commonly used report might make problems because a retention rule has been forgotten and is still active deleting. Most of the data still sits there unarchived. Some of the data deleted but not erased and finally - forgotten. That is not risk management; it is institutional amnesia.

Archiving, once started, has only two legitimate outcomes: completed or never begun. Anything in between undermines both compliance credibility and internal trust. Auditors remember half-done projects far longer than successful ones.

The operational rule is clear: Plan – Align – Execute. Re-calibrate, if necessary, but never retreat. Once the first deletion run is executed, history cannot be rewritten. Preparation and documentation are as important as configuration. Define your scope, lock it in, communicate the rationale. Future teams will judge not what you deleted, but how traceable your decisions were.

An unfinished ILM project keeps its risks alive but loses every advocate who once supported it. Finish it once. Document it well. Then never fight the same battle twice.

6. Conclusion: Archiving Is Strategy, Not Maintenance

Archiving is rarely urgent — until it suddenly is. Across all four mistakes, the pattern is the same: delay, delegation, underestimation, and fatigue. None of them are technical failures; all are governance failures.

C-levels who address archiving directly are, in part, pioneers. They operate in a field that only recently gained visibility yet quietly defines how data, cost, and credibility will align for the next decade. Handled properly, archiving introduces a new cadence of decision-making — short inspection loops, clear ownership, and transparent progress — within organisations that usually move only in long planning cycles. It becomes a practical exercise in controlled adaptability: learning fast without losing authority.

Once completed, the reward is structural: stable cost, predictable audits, and a system landscape that no longer hides its own history. Archiving, at its core, is the quietest way to demonstrate mastery. And mastery, in enterprise data, remains the rarest form of leadership.