LEARN HOW PURGING AND ARCHIVING ERP DATA DELIVERS REAL BUSINESS BENEFITS

A Q&A WITH BRIAN BARTKOWIAK, VICE PRESIDENT, INFORMATION TECHNOLOGY WORLDWIDE AT GEORGE P. JOHNSON (WWW.GPJ.COM)
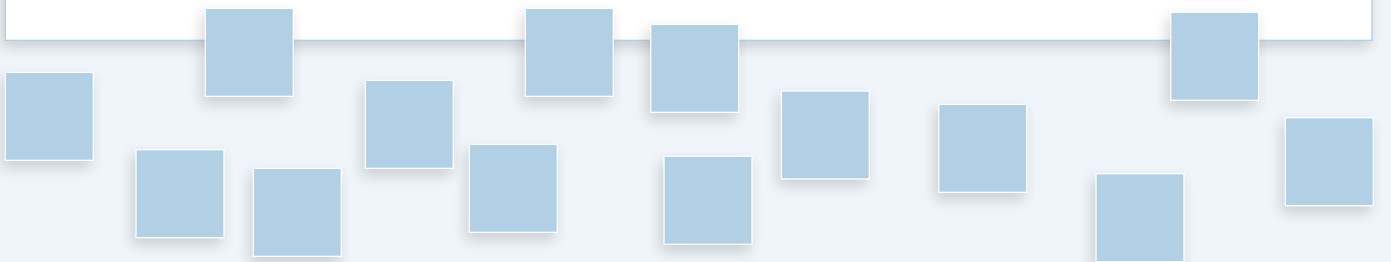
MANY COMPANIES ONLY START LOOKING AT PURGING AND ARCHIVING ERP DATA WHEN LEVELS ARE ALREADY CRITICAL AND DISRUPTING KEY BUSINESS PROCESSES. HOWEVER, TACKLING A PURGE AND ARCHIVE PROJECT IN FIRE-FIGHTING MODE IS NOT THE MOST EFFICIENT WAY OF DOING THINGS. WHAT'S MORE, INCORPORATING PURGING AND ARCHIVING INTO YOUR ERP MANAGEMENT PLAN GENERATES REAL BENEFITS FOR BOTH THE IT DEPARTMENT AND THE BUSINESS AS A WHOLE.

In 2009, George P. Johnson (www.gpj.com) undertook an ERP purge and archive project with ARCTOOLS (www.arctools.com) and Whitehouse Consultants (www.whitehouse-consult.com).

In the interview below, Brian Bartkowiak, Vice President, Information Technology Worldwide at George P. Johnson (GPJ) discusses why they decided to purge and archive their ERP data and the results achieved. He also gives some great tips and advice about how to successfully run a purge & archive project.

Tell us about George P. Johnson's history with JD Edwards.

We started using JD Edwards EnterpriseOne release Xe in 2001. In line with our strategy to continuously innovate, we have kept up-to-date with the various product evolutions, upgrading to release 8.10 in 2006 and to release 9.0 in November 2009.

How does JD Edwards support your business?

Our approximately 1,000 users worldwide use a single, global instance which is live 24-7. JD Edwards is used to manage the complete lifecycle of our business. With a heavy job cost emphasis, all client projects are managed from inception to completion. All of our business functions rely on JD Edwards for tracking all operational and financial information.

Specifically, we use financials, distribution, human resources and benefits, payroll, expense management, as well as several custom modules which we have built using the JD Edwards toolset.

We have also integrated JD Edwards with other applications, including a data warehouse which is used for business intelligence.

Why did you decide to upgrade to 9.0?

At GPJ, information technology is considered a strategic asset of the organization. As a forward-thinking and forward-acting agency, GPJ has always been an early adopter of technology. While many companies look at an upgrade as a painful process, at GPJ we see it more as an opportunity to ensure that we are bringing value, innovation and efficiency to our clients.

Why did you decide to purge and archive your data?

We had been contemplating an archiving initiative for several years due to the volume of data we had accumulated. Performance of our production system had begun slowing down as queries were taking place over eight years worth of data.

However, the fact that we had an upgrade on the horizon was a real catalyst for the project. For our previous upgrade, from Xe to 8.10, the data conversion process had taken several days to complete. For our upgrade to 9.0 we wanted to reduce the amount of time spent on data conversion and minimize the interruption to our business users.

We were very proactive and started planning the project in the fall of 2008, well in advance of our projected upgrade target date of November 2009.

Purging and archiving projects often get pushed down the to-do list. How did you build the business case?

We worked with the ARCTOOLS team and Whitehouse Consultants to determine the software and consulting costs. The ROI analysis included the downtime impact during the upgrade data conversion process as well as reviewing the impact of improving overall daily system performance for our user community.

A major advantage that ARCTOOLS had over the competition was that the consulting work could be completed remotely. This seriously helped our ROI as costs were kept to a minimum.

Finally, before purchasing the product we did a "Proof of Concept." This helped us to prove to our board of directors and to our end users that the purging and archiving project would deliver clear and measurable value.
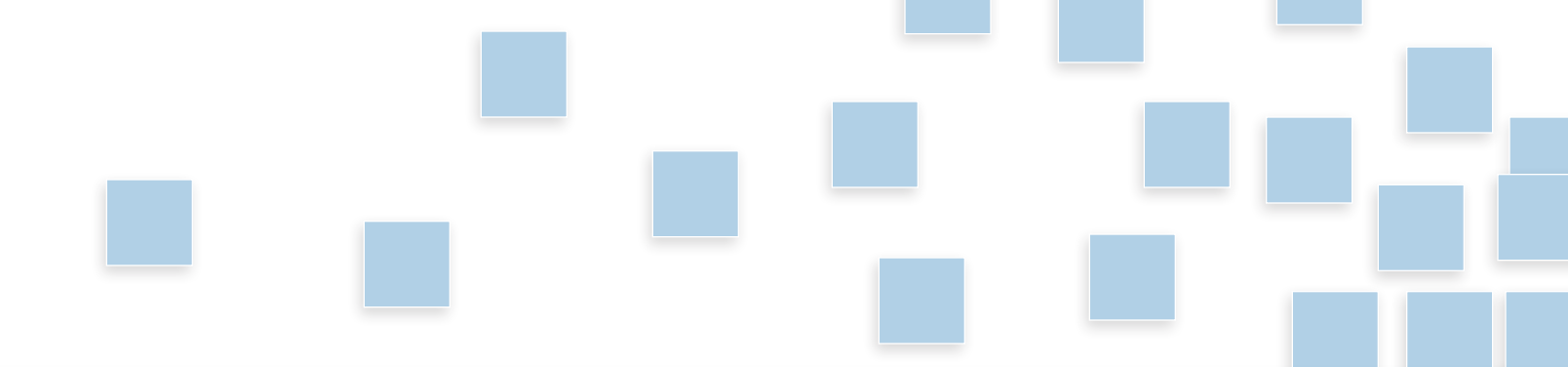
What options did you look at?

Well, I guess like most people, we looked at what products were on the market, what was available within JD Edwards and whether it was worth building a tool internally.

We realized fairly quickly that the functionality in JD Edwards was just not sufficient for our needs. That left us with the choice of either buying a piece of software or developing a tool ourselves. In the end, we realized that we would get a better ROI from buying a solution.

Why did you choose ARCTOOLS?

After looking at several products, ARCTOOLS emerged as the clear leader in terms of ease of use, cost effectiveness and flexibility. ARCTOOLS was efficiently able to handle archiving from custom JD Edwards tables, as well as data from other applications.

We were also reassured by the fact that ARCTOOLS had already been used by hundreds of JD Edwards users worldwide and had been built and fine-tuned by JD Edwards experts.

Can you talk us through the different stages of the project?

We began the project with a one month "Proof of Concept" before making our final decision to purchase the product. The "Proof of Concept" was really beneficial as it allowed us to not only validate the product, but also to gain a thorough knowledge of how the purge and archive process works.

We then extensively tested each module that we wanted to purge and archive: A/R, A/P, G/L, Job Cost, Purchase Orders, Inventory, Time Card History, Expense Management, Custom Estimating Module, and our Custom Sales Forecast Module. This was done by using data in our test environment.

Once we had validated the purge and archive rules, we then began the purge and archive process over our production data. After purging was complete and the G/L detail had been summarized, we performed some database reorganization in order to remove fragmentation and optimize the database performance of the production tables.

The final step in the project was to enable access to the archive for our business users. This was straightforward because we are using the standard JD Edwards interface to access archived data.

What, if anything, would you do differently?

I would not make any changes to the process we followed – we completed the project on time, on budget and with positive results.

What were the results of the project?

Application performance improved after archiving over 35,000,000 rows from our production database.

Over 20,000,000 rows were archived from the account ledger table (F0911).

Our data conversion during the 9.0 upgrade was able to complete in a very reasonable timeframe. During our last upgrade the data conversion process took approximately thirty-six hours and during the 9.0 upgrade, this took less than twenty-four hours.

Tell us a little about the project team.

We had a core group of three working on the project. In addition, there were others from IT involved in the initial investigative stages (knowledge gathering to understand the impact on other applications, as well as server and network impact) as well as during testing.

Given the multiple projects we had in process (upgrade planning included), I was the project sponsor as well as project manager and one of the business analysts. Also working on the project was a DBA, a CNC administrator/systems administrator and someone from the ARCTOOLS/Whitehouse Consultants team.

Tell us a little bit more about running the project remotely.

One of the things we really liked about ARCTOOLS was the fact that a lot of the project was done remotely. This not only kept consulting costs down, but it also meant that there was less of a time impact on our internal team. We were able to work on the project in small time chunks, giving us time for other day-to-day responsibilities.

Of course, when a lot of the work is being done remotely, you have to be extra vigilant when it comes to communication. However, thanks to clear processes that were put in place and the expertise and professionalism of the Whitehouse/ARCTOOLS team, we avoided any communication issues and the project ran very smoothly.

What advice do you have for others planning a purging and archiving project?

There are three main pieces of advice I would give to anyone planning a purge and archive project. First, I would stress the importance of having a cross-functional team. You need to have both technical and functional people involved, ideally: a DBA, a CNC administrator, business analysts and business users.

Secondly, an extensive testing phase is imperative. Testing is particularly important for custom tables to ensure that the archive scripts provide the results required. ARCTOOLS makes testing easy due to its 'proof mode' and also due to the fact that you can easily undertake 'a reverse purge.'

Finally, it really helps to work with consultants like those from ARCTOOLS and Whitehouse who are not only experts in data purging, but who also have a deep knowledge of the JD Edwards application and table structures.

What about purging and archiving going forward?

ARCTOOLS makes purging and archiving ERP data easy. We got some help from the ARCTOOLS and Whitehouse team initially, but we now feel comfortable purging and archiving our data independently. Every year we plan to archive an additional year's worth of data. The benefits can be seen not just during the upgrade process, but also on a daily basis by end users and the IT department – with less data in the production environment, end-user queries run more efficiently and database maintenance is simplified.

ABOUT ARCTOOLS

ARCTOOLS is the leading purge and archive solution for JD Edwards EnterpriseOne and World.

Developed by recognized JD Edwards experts, DCSoftware and Whitehouse Consultants, in collaboration with the JD Edwards company, ARCTOOLS is a proven solution.

ARCTOOLS delivers a set of standard rules to enable quick and efficient purging and archiving. These rules ensure that data integrity is protected and can also easily incorporate client specific configurations and customizations.

ARCTOOLS is easy to understand and use, which guarantees a short implementation time. Over two hundred and fifty JD Edwards customers on six continents have already chosen ARCTOOLS.

www.arctools.com

ABOUT GEORGE P. JOHNSON (GPJ)

George P. Johnson (GPJ) is one of the foremost event and experience marketing agencies in the world. The company specializes in using branded live experiences and environments to help Fortune 1000 clients cut through marketplace noise, differentiate themselves from the competition and create lasting relationships that make a direct impact on the bottom line.

With 26 offices and more than 1,000 employees worldwide, the agency plans, creates, activates and measures nearly 5,000 events annually, ranging from award-winning entertainment sponsorships to trade shows, conferences, mobile marketing and more. GPJ's customers include category leaders such as IBM, Cisco Systems and Toyota.

GPJ has been using JD Edwards for ten years.

www.gpj.com

ABOUT WHITEHOUSE CONSULTANTS

Established in 1991, Whitehouse Consultants is a leading JD Edwards Consultancy with offices in France and the UK.

Whitehouse Consultants are experts in the field of purging and archiving and have a strong reputation as a "local" European partner with extensive international experience.

www.whitehouse-consult.com

ABOUT BRIAN BARTKOWIAK

Brian Bartkowiak, Vice President, Information Technology Worldwide, has been with George P. Johnson for more than eighteen years. A graduate of the University of Notre Dame, Brian leads the twenty-five person global Information Technology team responsible for ERP, business intelligence, telecommunications, messaging and collaboration, internal software development, networking, hardware and desktop support.

Brian is a Certified Public Accountant and has extensive ERP experience both with JD Edwards and other ERP solutions.

ABOUT DCSOFTWARE

DCSoftware was founded in 1996 by Dave Shea. Prior to founding DCSoftware, Dave spent six years with one of the largest systems consulting firms in the world, working in defense and commercial manufacturing. He has also held a number of senior IT positions including: Director of Information Services for a multi-national manufacturer; Director of Information Services for an international pharmaceutical company; and Director of Information Services for a medium-sized biotech firm. Dave has more than twenty-five years experience in ERP environments.