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PURGING AND ARCHIVING YOUR PEOPLESOFT DATA USING ARCTOOLS

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Author's Note: I am currently implementing this solution for our company and thought I would share the experience.

OUR COMPANY HAS BEEN USING PEOPLESOFT WORLD AND ENTERPRISEONE FOR MORE THAN SIX YEARS. After our upgrade in April 2003 to the AS/400, upgrading the operating system to V5R2 and OneWorld service pack upgrade, we started having some performance issues. Most of those issues we have worked out with IBM. However, we noticed that in our environments that had less data, reports and inquiries ran a lot faster. So we began a project to purge and archive the old data that wasn't being used.

There are a couple sides to a purge/archive project. One is defining what you are going to purge/archive. Another task is to determine which tool you will use to accomplish this. Our users quickly came up with a purge date — we would keep all data from current year plus two full years back. We will be archiving the data to another new archive environment so we can access any data that is not in production using the normal PeopleSoft tools. I have supported World software for many years and have been through the whole financial purge process and at previous customers had created our own purge procedures using P00PURGE. I was not ready to start that all over again. I started looking for a business partner and found that two products are available for purging/archiving data on the AS/400: iTera Purge & Archive and DCSoftware ARCTOOLS. We eventually chose ARCTOOLS.

Both iTera and DCSoftware are working with Sue Brown at PeopleSoft. Brown is working with a group that is defining the data relationships that are intrinsically designed into PeopleSoft software. Both companies have created "J.D. Edwards" modules for their purge/archive software. They have finished schematics for the F0911 (by itself), A/R, A/P, Manufacturing, Sales and Purchasing modules. They are still working on the schemas for Job Cost, Payroll and Fixed Assets.

After reading over both products' manuals and exchanging emails with both vendors, I personally felt that DCSoftware, in particular Dave Shea who owns the company, was more focused on the purge/archive solution, while iTera has so many products to offer, that I felt like we would get lost in the fray. But this is only my personal opinion. Both products were comparable in function, price and services. I sent and received some communications from other ARCTOOLS customers. Our company was worried about the size of DCSoftware's staff, although they have been around for a long time. So we got our software implementation partners involved. This gave DCSoftware a new avenue for sales, the software implementer, Systems Management Inc. (SMI), a chance to see the product and gave us more resources for help.

DCSoftware already has its own partnerships for implementation. For our implementation we were assigned a resource from TeamCain, a company out of Toronto, Canada. Our other partner, SMI, also provided a resource to sit in and learn. We had these resources for three full days. So I planned on some installation time and then time for meetings with the users.

The installation was pretty seamless. The software was sent to me ahead of time, and I was able to restore it to the AS/400 in three easy steps: create a library, create a user and then restore. So our installation time was spent going over the menus and system in general, and then putting training materials together. I have a group of about 12 "super users" who are super. I was hoping to get at least a couple of interested parties for each of the Financial, A/R and A/P meetings. I ended up with all of them for the whole two and a half days and had to move to a bigger conference room for the work groups.

The process for Purging and Archiving with ARCTOOLS goes something like this: (Obviously we're starting in a test environment and testing all of this before trying it in production.)

1) Run integrities for the tables being purged, so you know what your problems are from the start.

2) For each system that you are purging, run a series of queries. These queries will create tables that will contain the keys to the files you are purging. This means that the record set to be purged is not being determined on the fly, during the purge. It's set ahead of time. The queries were sent as part of the software. The only things that we changed within the queries were the date for purging and the libraries where the data was contained. You will need to decide whether your users will be responsible for running this entire procedure, or different parts of it. As I said, I have super users, so I am expecting one user for every module to be running the purge/archive procedures themselves. We'll see how they are doing by the time we get to production. So I have to train users on Query/400 for running the queries. I've added a menu option in World for them to get to Query/400 and to the ARCTOOLS main menu. Since our company uses World, at least they already know about AS/400 emulation sessions, though they've asked for some training there, also.

3) Use the ARCTOOLS menu options to set up the rules for purging and submit the purges. Here I have one complaint: For every screen you enter, you have to press ENTER, then use function key F22 to go to the next screen. Just an annoyance. But setting up the rules was intuitive. On the last screen you decide which job queue to submit the job to and when you want the job to end. That way you can control the job, stopping and restarting it for backups and other activities. These purges can run while people are working. The software even has a built-in throttle. You can set the job to how many records you want the job to process per minute. In between processing each set of records the job will go into a delay state. That way, while others are working you can slow the purges down, then speed them back up again at night.

4) After you run all of the purges that affect the F0911, you go back to PeopleSoft and run the F0911 summarization. I know, I thought I was getting away from this. But there is a kink. The summarization is run over the purged F0911 records. Then the balance forward records are copied back to the F0911 that the records were purged from, using the ARCTOOLS product in the opposite direction. So users can be on the system when this is running also. This also means, though, that you have to have enough of a PeopleSoft World or EnterpriseOne environment created over the archived data in order to run the summarization. You were going to setup an Archive environment anyway, weren't you?

5) After all of this is complete, you need to test to make sure the purges ran correctly, and rerun your integrity reports to ensure that the same problems exist as did before you started purging.

So far, my company is at step three. We submitted the purges on our Development AS/400, and a few of the F0911 purges are still running. We had 32M records in the F0911 and hope to purge half of them. In fact, with that one table we hope to gain back about 45G of DASD, although you could say that we just moved the disk space requirement to another environment. When we first began, I was wondering how ARCTOOLS would handle keeping the F0911 and F0902 integrity intact. I was hoping to purge both, actually, as many of those slow reports run over the G/L balance table. But this method of summarization fits in with the PeopleSoft methodology. It makes sense.

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