

Fortune 500 Financial Services Organization

PPM debuts its Purge Tool successfully with over 50% data reduction resulting in accelerated performance and reduced maintenance time



Legacy Data Caused Performance Issues

This Fortune 500 investment and insurance company is widely recognized for its service excellence, sustainability practices, trust, and integrity. It has a long-standing relationship with OpenText™, through its use of OpenText™ ALM/Quality Center and UFT One to support its application testing requirements. Since the early 2000s, it has also relied on OpenText™ Project and Portfolio Management (PPM) to manage its major IT investment projects. The organization leverages most PPM modules available: project management, resource management, time management, and demand management. With over 3,500 business users depending on PPM for their daily work, the organization made the decision to move

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its PPM implementation to a Software-as-a-Service (SaaS) environment when OpenText™ introduced this deployment option. It means system maintenance and upgrades are managed and supported by OpenText™, leaving the customer to focus on their core business. As time went on, the application maintenance Lead Tech for the organization started to notice some limitations: “With over 300 projects captured in PPM, containing 12,000 requests, 14,000 reports, and over 168,000 time sheets, our data volumes were huge. The system had grown complex over the years, with integration into our legacy HR systems and Active Directory. Nightly batch runs consolidate all data through our Extract/Transform/Load (ETL) processes, ready for daily, weekly, and monthly financial reporting, to satisfy our regulators. The batch runs were taking longer, it was impacting our overall system performance, and regular system maintenance sessions could mean a downtime of 8-10 hours because of our database size.”

PPM Purge Tool Successfully Reduces Database Load

To comply with current data privacy laws, the organization should only capture the last six years of business data in their production environment. They were keeping 16+ years, and there was no easy way to delete old data,

At a Glance

- **Industry**
Financial Services
- **Location**
USA
- **Challenge**
To comply with recent data privacy regulations, and optimize performance for over 3,500 business users, the organization looked to delete 11+ years of project management data
- **Products and Services**
Project and Portfolio Management (PPM)
PPM Purge Tool
- **Critical Success Factors**
 - + Over 50% reduction in key database schemas boosts system performance
 - + Over 50% time saving for system maintenance activities
 - + Full compliance with data privacy regulations

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because of complex interdependencies and the number of tables containing data. The organization consulted with OpenText™ and was pleased to learn about the PPM Purge tool. This is designed to permanently delete (purge) old database data by specifying purging criteria, based on the organization's business requirements. This significantly decreases the database load, and boosts performance.

The OpenText™ Advanced Consultancy Services (ACS) team worked closely with the organization to analyze the data. Because of the complexity of this environment, an OpenText™ SaaS Technical Solutions Consultant (TSC) was engaged in defining their particular business criteria and guiding the customer's project teams. The Purge tool was tested on a non-production environment, to iron out any feature design issues or code defects. The Application Owner comments: "The PPM Purge tool was new, and our environment was very complex. It was great to work closely with Micro Focus (now part of OpenText™) R&D to discuss design changes and quality fixes that will help not just our project, but other PPM customers' projects too."

Once the full business data was validated by the customer, successful dry-runs of the PPM Purge Tool were executed on the staging, development, test, and finally the production

environment. All steps were documented in a runbook and a few additional database configurations were required to complete the purge work in the multi-node production environment.

50% Performance Boost and Reduced Maintenance Time

The organization saw an immediate return on investment, as application maintenance Lead Tech explains: "After using the PPM Purge tool, our production and reporting schema sizes were reduced by more than 50 percent. Maintenance activities such as instance backups, schema rebuilding etc. are now done in half the time it used to take us. More importantly, we are fully compliant with the latest data privacy regulations."

He concludes: "The issue of legacy data was affecting the trust we had in PPM as an effective solution for us. This project has restored our trust and gives us confidence in the future successful partnership we enjoy with Micro Focus (now part of OpenText™)."

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