



Washington County Minnesota

Klik IT Product:
Purge-it!

Business Sector:
County Government

Washington County is on the eastern edge of the Twin Cities Metropolitan area, composed of 423 square miles of land. It runs more than 40 miles in length and encompasses 468 lakes of 10 acres or more in area. The county seat is in Stillwater, Minnesota, along the St. Croix River.

Background

Washington County is running JD Edwards EnterpriseOne 9.2 (64-bit) with 4 **Purge-it!** modules; Accounts Payable, Accounts Receivable, General Ledger and Purchasing.

Selecting a JD Edwards Archiving Solution

After moving from JD Edwards World to EnterpriseOne some years ago, Washington County was keen to look for an archiving solution that could help get live data out of its production environment.

The archiving tool that had been used historically, generated massive PDF documents that were then saved onto a separate network drive. The organization didn't want to continue with this archiving model.

Developing an inhouse JDE archiving tool was not a consideration for Washington County.

Purge-it! was selected as the archiving solution by Washington County government because it is integrated into EnterpriseOne. Users don't have to go into a different looking 3rd party software to try to look up records or to view items. The **Purge-it!** solution is intuitive for the system users at Washington County and it's far easier for them to access archived data in comparison to the huge PDFs that had to be searched through previously.



Dashboard Interface

With a firm focus on enhancing the user experience, Washington County finds the **Purge-it!** dashboards provide valuable data insights.

The team at Washington County speaks highly of the way they can review the data that's being archived and see in advance how much data would be archived with different processing options. They can change the processing options and re-run it and then analyze it in proof, then go ahead and do it in final. Washington County is reassured by the **Purge-it!** easy-reversal capability, even though they've never needed to use it.



JDE Native



Dashboards



Easy Reversal

Washington County finds the dashboard interface makes the tasks super easy. If the system users are looking for some details they don't see in production, the Washington County Accounting & Finance Department is confident in saying, go ahead and look for the information via the **Purge-it!** menus. The users don't need to go to a different place to see the attachments. In the past, the users weren't given access to the huge PDF documents. Instead, the Accounting & Finance Department would do the data mining if the users needed access to information they couldn't see in the live environment. Once again, this comes down to the integration of **Purge-it!** in E1.

Implementation

Washington County found the **Purge-it!** implementation straightforward with no issues. They did the training with Klik IT on how to perform the archiving and on how to set up versions of the archives.

Klik IT recommends archiving the contracts and purchase orders first. Washington County sticks with this advice and archives in this order.

*"Every time we've reached out to Klik IT, if we've been doing an upgrade or moving to the newer version of **Purge-it!** the Klik IT team has always been super responsive."*

"Do you ever switch off?"

"Klik IT is very easy to work with. Despite the time difference with you being based in the UK, it's never been a problem to reach out. In fact, I'm shocked at how fast you respond!"

"The support team is completely wonderful. I attended a Klik IT webinar and realized I didn't have the full dashboard view. We jumped on a call following the webinar to get that all switched on – it's great – we love it!"

Data Retention

Washington County can receive a large number of public information requests that must be fulfilled. With this in mind, Washington County agreed as standard to retain 3 years of data plus current in its live JD Edwards environment. Everything older than that can be archived. The exception to this is contracts which must be kept for 10 years (that is 10 years after the last payment is made).

The intention is to maintain these retention rules by archiving every year.

Why keep what you don't need?

When it comes to data management, Washington County keeps data cleaned up and put away. They review the data integrity reports and work to have a cleaner JDE E1 system.

Data Integrity

From vouchers through to contracts and journal entries, everything Washington County handles has an attachment. Receipts are the only exception. As a local government, they must pass annual audits, so it's crucial that when the archiving happens in **Purge-it!**, those attachments stay intact. **Purge-it!** maintains the integrity of the archived information and Washington County keeps the connection to the attachments.

*"The fact that **Purge-it!** is built into JDE E1 is a big tick in the box for Washington County MN."*

"The dashboards are visually appealing. You can easily see figures of how much data you have and how much would be archived if you ran certain modules."

*"**Purge-it!** being integrated in E1 was a big deciding factor for us. We don't need to access a separate 3rd party tool or go into a different system. The integration is a huge win for us with using **Purge-it!**"*

*"The easy reversal functionality in **Purge-it!** gives you the extra confidence if you have doubts about your data selection – it acts as a failsafe, just in case."*

*"I can't think of anything I wish **Purge-it!** did for us better than it already does."*

*"We wouldn't hesitate to recommend **Purge-it!** to EnterpriseOne users"*

Archiving & Data Management for JD Edwards



#tackletangle

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