Aggregate uses Data Retention Policies for successful Data Archiving

Klik IT Product:
Purge-it!

Business Sector:
Building Materials

Aggregate Industries, a member of LafargeHolcim, is based in the UK with its HQ at Bardon Hill in Leicestershire. Founded in 1858, Aggregate is at the frontline of the construction and infrastructure industries, producing and supplying an array of construction materials.

Background

Aggregate Industries runs Oracle JD Edwards EnterpriseOne 9.0 and has 1700+ JD Edwards users.

The company has used *Purge-it!* since 2014 and *Manage-it!* since 2019, demonstrating a clear commitment to proactive data management.

Lessons Learnt

"We've learned so much about data archiving and data management, it's been a real journey for us. We're keen to share our knowledge and experience with other companies who may be about to embark on a data archiving project or be considering it for the future."

Jane Martin, Head of IT Business Systems & Security, Aggregate Industries.

Despite archiving often being considered a purely IT technical project, Aggregate sees data management as a far broader task that involves the whole business, because that is where the ownership of the data lies.

"It is vitally important that each department understands they are responsible for their business data. That is why it is crucial to spend time working out and defining a meaningful Data Retention Policy that is right for differing requirements. IT needs to work closely with individual departments to provide technical input and support during this process, but the key point is that it is a shared responsibility."

"Don't underestimate the importance of a Data Retention Policy if your organization is serious about getting the most from purging and archiving activities."

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Factors to Consider Upfront

As your company's JD Edwards system continues to grow, there is usually a broad consensus internally that end of life data could and should be archived. In many cases, companies look to their auditors or legal advisors to understand the official guidance around this. However, by developing a Data Retention Policy upfront, you can have a far more comprehensive approach to Data Archiving.

Once each department agrees their data retention requirements, you have a policy that can be referred to and followed for Data Archiving and Purging activities. This allows for much farther-reaching and consequently more effective Data Archiving activities.

Aggregate has put Data Retention Policies in place across many departments and continues to push forwards with this important work. The message from Aggregate is, *"don't underestimate the importance of a Data Retention Policy if your organization is serious about getting the most from purging and archiving activities."*

Automated Archiving & Validation Checks

Mark Beswick, IT Application Support Manager at Aggregate Industries has set up automated data archiving for the Finance, Procurement and General Ledger records so that they run overnight.

Aggregate is particularly pleased with the ***Purge-it!*** Pre-Archive Validation Checks, and subsequent audit information. This means outstanding POs/SOs are highlighted as part of the automated archiving activity. The IT department can then go back into the business to resolve these. At no stage will ***Purge-it!*** archive incomplete records.

Purge-it! Dashboard Interface

Aggregate finds the interactive, visual dashboard interface brings a clear and much improved understanding of the archiving process for both technical and non-technical employees.

"Simply the best" support from Klik IT

The Aggregate team scores Klik IT highly on service,

"Klik IT are one of the best suppliers we have worked with, offering the best levels of support and the best reaction times."

"Whilst Purge-it! is certainly the right product for Aggregate Industries, it is the helpfulness and high level of service from Klik IT combined with the product that is the winning combination."

What's next?

– Continue to use ***Purge-it!*** for all JD Edwards Data Archiving requirements.

– More fully utilise ***Manage-it!***, particularly the Data Masking functionality for data in the non-production environment.

– Maintain effective Data Retention Policies, ensuring they are kept up to date and relevant for the business.

Archiving & Data Management for JD Edwards

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