



Princeton Softech relies on Pivotal's eRelationship™ software for customer relationship management and day-to-day sales and marketing activities.

**Challenges:**

- Improve application performance
- Improve query and reporting response time
- Reduce screen clutter
- Provide easy access to archived data

**Princeton Softech Solution:**  
Archive™ for Servers

**Success:**

- Improved application response time
- Reduced query and reporting response time
- Archived more than 50% of the data
- Ensured easy access to archived data

**REDUCED PERFORMANCE IMPACTS MISSION-CRITICAL APPLICATION**

As the market leader in database archiving technology, Princeton Softech has years of experience working with companies worldwide to manage database growth. Princeton Softech's Active Archive™ Solutions help companies to improve performance, increase availability and reduce costs. So when faced with the challenge of improving the performance of its mission-critical Pivotal CRM application, Princeton Softech knew how to solve the problem.

Princeton Softech relies on Pivotal eRelationship™ to manage sales leads, monitor sales and marketing activity and capture information for revenue forecasting. The Pivotal CRM provides information to develop product, sales and marketing strategies that help improve closing ratios. Real-time decision support capabilities offer a variety of analysis and reporting options from projecting the expected profitability of a product line to managing technical issues at customer sites.

Response time became an issue when the company upgraded to the newest version of the Pivotal CRM. The sales team experienced lengthy delays starting the application and slow response time for queries and reporting. Productivity and customer service were consequently affected. Because fast response time and real-time access to CRM data are essential, the IT Department realized that degraded application performance would adversely impact business operations across the organization.

**NEED TO ARCHIVE HISTORICAL DATA BECOMES CRITICAL**

The Pivotal CRM database contained seven years of data, which included at least three years of rarely accessed historical data. Because the data had never been archived, closed sales "Opportunities" were maintained online with those currently in an active sales cycle. In addition, completed or scheduled "Activities" older than two years were retained in the database.

The upgraded version of the Pivotal CRM provided new functionality and presented more information than ever, allowing a comprehensive view of the customer. However, the process of retrieving all of the Activities and Opportunities for a customer slowed the response time. The upgrade also delayed the response on other queries and reports. The sales team found it time consuming to scroll through each customer's historical data just to obtain current information.

"We decided to archive to reduce data volume and improve application performance," said Amy Phillips Mindnich, Application Systems Manager. "We needed easy access to the archived data, as well as the capability to restore archived data if needed. There was never a doubt that Princeton Softech's Archive™ for Servers would be the solution to our problems. We knew that archiving would give us continued access to our historical data, guarantee the referential integrity of the data and manage the application-defined relationships during archive processing."

## PRINCETON SOFTECH IMPLEMENTS DATABASE ARCHIVING

The IT Department formed an archive team to develop a phased approach. They began by identifying user requirements and determining the types and identity criteria of the data to archive. Because most of the data relationships were defined in the CRM application rather than the database, the next step was to document the data model and use Archive for Servers to define these relationships.

Combining the integration capabilities in Archive for Servers with the Pivotal CRM customization features made it easy to integrate database archiving and provide transparent access to the archived data within the Pivotal CRM. Archive for Servers offers options for storing archived data on the most cost-effective medium, including an archive database, on-line files, near-line files or off-line files. Based on the immediate need and data usage patterns, in Phase I the team decided to store the archived data to "archive tables" within the CRM production database, ensuring easy access to the archived data. The archive team also created a test environment to prototype the archive, delete and restore processes.

After users were shown how to access archived data using familiar Pivotal CRM screens, the team was ready to perform the initial archive process. Of the 204 tables in the CRM database, the Activities and Opportunities tables, which contained the most historical data, were the largest tables selected for archive and delete processing. The Activities and Opportunities business objects include data stored across 30 related tables. Upon completion of archive and delete processing, the size of the Activities and Opportunities tables was reduced by 70 percent and 40 percent, respectively.

## SUCCESS OF PHASE I PAVES THE WAY FOR FUTURE ARCHIVING

The complete implementation of Phase I, including testing, system configuration and training, required less than one month. Based on projected database growth and routine archiving, the full implementation plan will have multiple phases. Phase II, planned for 2004, will involve archiving additional years of data and new business objects to the archive database. In Phase III, the archive team plans to move data from the archive database to Archive Files that can be stored on a cost-effective medium, such as a WORM device.

"The phased implementation plan is the best strategy to ensure both immediate and long-term success with archiving. This approach provides an effective way to archive according to the business value of the data," said Jim Lee, Vice President of Product Marketing. "Many of our customers would benefit from using a similar technique with their archiving deployments."

## SUCCESSFUL ARCHIVING DELIVERS COMPANY-WIDE BENEFITS

The archive team met its main objective of improving Pivotal CRM response time. Performance improvements ranged from 50 to 85 percent faster processing when retrieving data. "We have been able to improve Pivotal's performance and response time for queries and reports and the archived data remains accessible from within Pivotal," said Phillips Mindnich.

Archive for Servers allowed the Pivotal CRM to perform up to its potential and provide the information Princeton Softech needed across departments to improve decision making. "Using Archive for Servers provided the most

cost-effective way to ensure that we can continue to meet our real-time decision support needs and preserve fast access to both current and historical data," said Lisa Cash, Princeton Softech's CEO.

Princeton Softech's sales team, the largest group of Pivotal CRM users, was also pleased with the results — especially since the application is crucial to their own job performance. "It now takes less time to prepare for calls, add notes and add contacts — enabling me to be better prepared for my calls and improve the results," said Ray Makela, Account Manager.

Fast access to customer information is even more critical when a salesperson is on the road. "For remote access, a stable quick link via phone line is not always available, and more problematic when access time is dictated by a travel schedule. Without the need to browse through the older historical information before getting to the most recent information, the time needed to connect is greatly reduced," said Ruedi Herrmann, Account Manager.

"We are confident that on-going archiving will provide continued improvements in response time, while providing easy access to the information needed for all business operations — all while reducing the cost of operations," said Phillips Mindnich.

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