Data migration is complicated
We make it simple.

Mitigating Data Risk for a $2.8B International Higher Education Organization

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Project Summary

A $2.8B for-profit higher education organization continually acquired universities as their network expanded over the years, necessitating data consolidation and migration to one solution.

Traditionally, each university had utilized separate financial and student management systems. Monthly financial reports were prepared in each of the different financial systems and provided to Hyperion Financial Management, leading to an extended financial close process each month as the results were compiled and reconciled.

To improve this process, the organization initiated a project to implement PeopleSoft as a centralized replacement for the disparate localized solutions, with the intent to consolidate data at the corporate level and streamline financial reporting and student management.

This case study explains Premier's role in the successful financial ledger data migration to PeopleSoft for nearly twenty of the organization's South American universities.

Requirements

Below are the four high-level data migration requirements imperative to the success of the implementation.
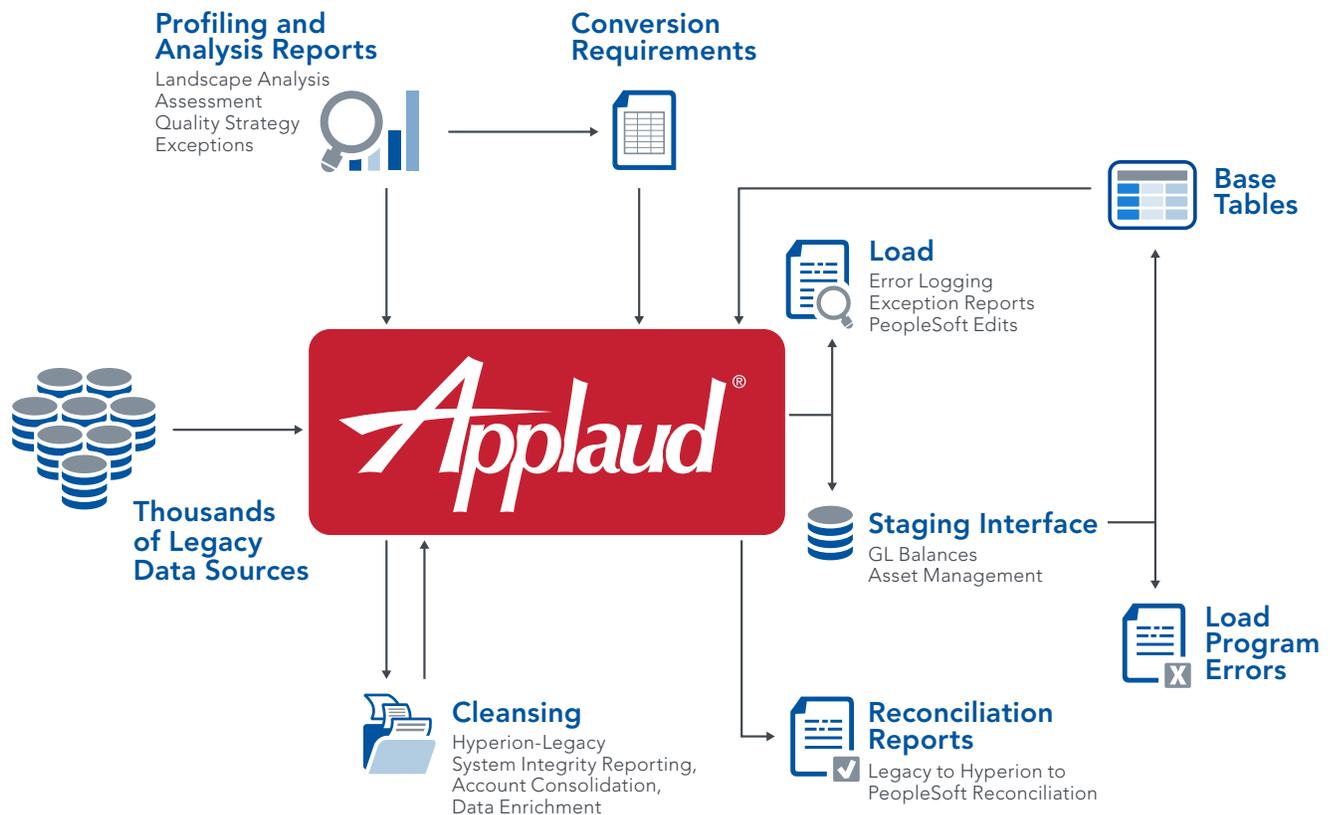
- The data from several distinct local financial systems needed to be extracted, cleansed, and transformed before it could be loaded into a single instance of PeopleSoft.

- The migrated data needed to be reconciled back to both the source data and to Hyperion after transformation.

- A standardized Chart of Accounts needed to be applied to each in-scope university, aligning with their existing Hyperion structure.

- The data migration process had to be standardized and repeatable, as new universities were added to the scope over the course of the project.

Client Challenges

There were many obstacles to making the data migration successful. Some of the most significant challenges were:

- The local financial systems and locations of the relevant data were not always known or well understood from an IT perspective, which obscured the legacy data landscape.

- Many of the legacy systems were homegrown and continuously in development and under revision, resulting in frequently changing requirements.

- Legacy systems contained poor data quality, such as missing, inconsistent and invalid data.

- Individual universities maintained their financial information across disparate data sources, increasing the difficulty of both conversion and reconciliation.

- The legacy financial data did not always balance with Hyperion's reported financials, increasing the difficulty of balancing and reconciling all financial data.

- The data structures of the legacy systems were drastically different than the target PeopleSoft structure where accounts needed to be merged, split, and restructured.

- Frequent changes to the Chart of Account mappings, which translated local accounts to the consolidated PeopleSoft financial structure, needed to be applied and validated within short timeframes, often several times in a single day.

- The changing target account strings coupled with the stringent audit requirements meant that any invalid data could fail to load to the target system. Bad data and unmapped accounts needed to be identified and corrected early in the process to ensure load success.

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Applaud®
for Data Migration

Profiling and Analysis Reports
Landscape Analysis
Assessment
Quality Strategy
Exceptions

Conversion Requirements

Load
Error Logging
Exception Reports
PeopleSoft Edits

Base Tables

Applaud®

Thousands of Legacy Data Sources

Staging Interface
GL Balances
Asset Management

Load Program Errors

Cleansing
Hyperion-Legacy
System Integrity Reporting,
Account Consolidation,
Data Enrichment

Reconciliation Reports
Legacy to Hyperion to
PeopleSoft Reconciliation

Key Activities

- The combination of Premier's expert data migration experts and Applaud's automated extraction and profiling abilities enabled a quick and thorough landscape analysis of the various legacy systems. This in turn enabled the team to identify the locations and types of financial data in each system.

- The integrated analytics and reporting functions made it possible to perform a deeper analysis on the legacy data, identify potential data issues and establish a data quality strategy.

- These tools were also used to identify and create unique combinations of entities, accounts and degree codes, enabling the creation and completeness of cross-reference mapping documents.

- Premier's experienced data migration consultants were able to identify, prevent, and resolve data issues before they became project issues.

- Applaud's data transformation capabilities enabled the team to quickly build repeatable data migration programs and to swiftly react to every specification change.

- The transformation capabilities also made it possible to develop a template that could be easily adapted to support additional universities as they came in scope.

- The integrated reporting tools were helpful in developing full financial reconciliations between the legacy source data, reported monthly Hyperion balances, and the translated PeopleSoft load files.

- All the pieces were tied together by Premier's RapidTrak methodology, which was essential to the team decreasing the overall data migration effort and reducing project risk.

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The
Bottom Line

The Applaud® Advantage

To help overcome the expected data migration challenges, the organization engaged Premier International's Applaud® data migration Services.

Three key components of Premier International's Applaud solution helped the client navigate their data migration:

1. **Premier's data migration consultants:** Premier's services group averages more than six years of experience working with Applaud, exclusively on data migration projects.

2. **Premier's methodology:** Premier's EPACTL approach to data migration projects is different than traditional ETL approaches and helps ensure the project stays on track. This methodology decreases overall implementation time and reduces the risk of the migration.

3. **Premier's data migration software, Applaud®:** Applaud has been optimized to address the challenges that occur on data migration projects, allowing the team to accomplish all data needs using one integrated product.
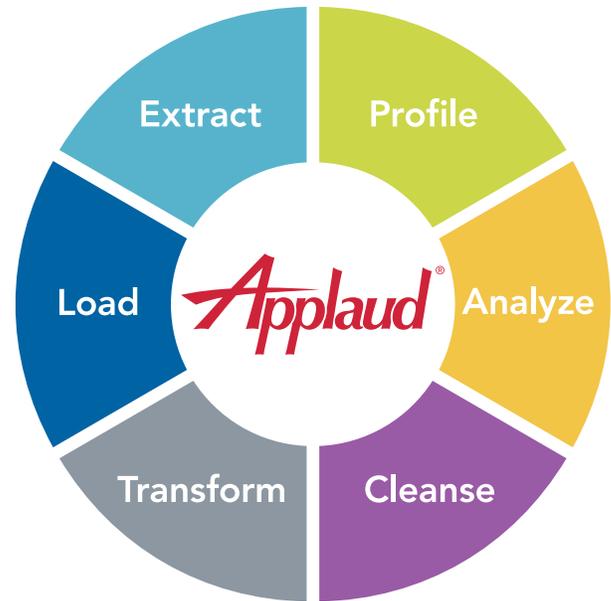
The combined aspects of the Applaud solution were leveraged to meet the challenges of this project.

The Results

The end result of using Applaud data migration services was a series of successful implementations as each subsequent country completed their adoption of the PeopleSoft solution. Without the Applaud team, it is unlikely the number of iterations required to address all mapping issues would have been possible in the required timeframe. Premier prioritized flexibility and standardization, two aspects that allowed the project to consistently adapt to timeline changes and project plan growth.

Over the course of the project, the Applaud process was rolled out to several of the client's country projects and nearly twenty different universities. By building a repeatable process that could be rolled out to future sites with minimal development, Premier streamlined deployment of the Applaud process to additional countries and universities. The client team was able to focus on the functionality of their PeopleSoft solution going forward rather than the specific process of the data migration, and Premier was able to focus on bringing this project to a successful close.

3,000+ DATA SOURCES

130 BUSINESS UNITS

16 COUNTRIES

1 FTE OVER 2.5 YEARS

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