

Key Elements to Successful EPM Data Conversion

The data conversion process entails the following steps for each data source. CompIntelligence consultants provide the painstaking patience and attention to detail required to complete this vital portion of your EPM project successfully.

✓ **Assess Source System Data**

- Can it meet the needs of the designed consolidation/budgeting application?

✓ **Define Data Detail and Extraction Process**

- What level of detail is required and how will we extract it from the source system?

✓ **Create Import Formats and Logic**

- Will you use FDM or configure an ERPI/FDMEE solution to pull trial balance data at the appropriate level of detail?
- What is the correct book of records to pull this data from?

✓ **Create Mappings**

- What accounts and other custom dimensions will be required? Assist the Finance team to create mappings to these.

✓ **Create Validation Rules**

- What validation rules will need to be displayed upon load? Assist in creating these rules.

✓ **Define Data Validation Detail**

- What level of detail is required for data validation?

✓ **Define/ Create Reports and Tools**

- What tools and reports will be used in the data validation process?

✓ **Load and Test Data Files**

- What issues arise when you load and test the data files for the 1st time? How will you resolve these mapping differences and kick-outs?

✓ **Identify Data Validation Team**

- What skills and knowledge are required to validate integrated data vs. its source (HFM vs. G/L)?

✓ **Educate Client Team**

- A knowledgeable team is the most self-sufficient and therefore the most satisfied client team. Be sure to conduct a 1-day training for the team responsible for the G/L data integration.

Want more information on our Consulting Methodology and Approach?

Contact sales@compintelligence.com or call 203-941-0714