

Accenture Software for
Human Capital Management

Your journey to the cloud

Secure data migration from SAP HCM
to SAP SuccessFactors



With low investment and operating costs, unlimited scalability, and permanently up-to-date applications, cloud computing offers many advantages for both managers and IT specialists in the field of Human Resources (HR). But one important step lies between the concept of cloud solutions and the reality of their productive use: data migration.

While transporting data from an old system to a new one is not rocket science, HR information is added and updated—and required—each and every day, so it must be accurate and available. Carrying out a migration with greater speed and control enables organizations to start reaping the benefits of a new system quickly and easily. You may have found yourself wondering how you can continue to run all of your HR processes smoothly in SAP SuccessFactors following your migration. How can you make sure that the transition is seamless, that payroll is accurate, and that, ultimately, you will be able to take your old system offline?

A team effort

The various tasks involved in a migration project require different skill sets. As a result, **HR professionals** or their strategic partners enlist a variety of teams that are often scattered across several locations. A challenge lies in coordinating these teams' schedules and activities while minimizing miscommunications or errors.

At the same time, the **HR department** needs to offer its subject matter expertise on various decisions related to the HR data:

What data fields and structures need to be transported into the new system, for example, and how will they be mapped?

How many years of historical data, if any, should be migrated?

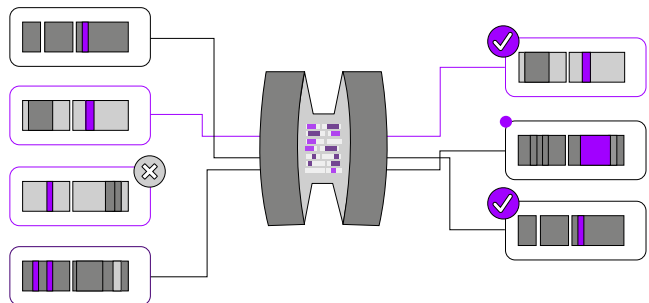
What data will not be migrated but needs to be archived for reporting and regulatory purposes?

Is there any requirement for data enrichment and augmentation, due to the data structure of the new system, and what rules need to be applied to supplement the source data?



In many cases, the old field names can be implemented as-is in the new system. When they cannot, the situation is more complex. Conversion rules must be defined; experts in the HR processes at hand need to determine whether certain data is required and how each rule should be formulated to deliver the right results for each and every relevant process.

Mapping out a migration manually using Excel spreadsheets is especially prone to common, but easily preventable errors (typographical, forgotten fields, missing or incorrect field length specifications) that lead to delays and additional effort further down the line. Consequently, the process of uploading data into SAP SuccessFactors will need multiple cycles to complete the task. Software tools make it possible to avoid such errors by automating and monitoring many of the steps involved in data migration.



An actual migration is handled by an **IT team in HR**, who convert the data from the old system and create corresponding CSV files to be uploaded into SAP SuccessFactors.

At present, SAP SuccessFactors provides more than 50 upload templates—individual CSV template files that need to be properly filled out—for migrating employee data alone. Alternatively, more than 150 entities can be populated via the OData exporter. Before the data is actually transferred, a series of test runs (or “mock conversions”) are conducted. Every mock includes more data and better quality as the errors are corrected in each new run until the information in the target system matches that of the source.

The necessary quality assurance tasks are handled by the **test team**. The tests performed must cover all of the HR processes that are to be administered in the new SAP SuccessFactors system. This means that a sufficient number of test cases are needed for the different employee groups or types. The effort required to properly organize this task should not be underestimated.



The goal is to determine whether all of the required data was migrated and whether the conversion rules are correct, which is why working closely with the HR team to ensure fast and straightforward troubleshooting is essential. Corresponding software tools compile the results in a clearly arranged format. With the two teams working hand-in-hand, all of the members involved are constantly kept abreast of the current status and the progress made so far. Any errors or defects are clearly highlighted to facilitate their immediate correction.

The **project management** team faces some daunting tasks as well. Companies typically proceed on a country-by-country basis, breaking down migration projects into a series of individual efforts. This enables them to repeat a number of activities and reuse as much material as they can. What is the most efficient way to organize this process without overlooking the specific requirements of each country?

Each of these subprojects usually requires three or four mock conversions before the data is finally migrated to the SAP SuccessFactors production system. The better the preparatory steps are handled, the fewer mock conversions will be necessary, which makes it possible to complete a migration in less time.

Regardless of whether the project lead is on the customer side or the consulting team, he or she needs to collaborate with the HR department in making three important decisions:

- 1. Are the results of the test runs good enough to proceed with the final migration to SAP SuccessFactors?**
- 2. Can the SAP SuccessFactors system go live following the test phase?**
- 3. Can the old system be taken offline?**

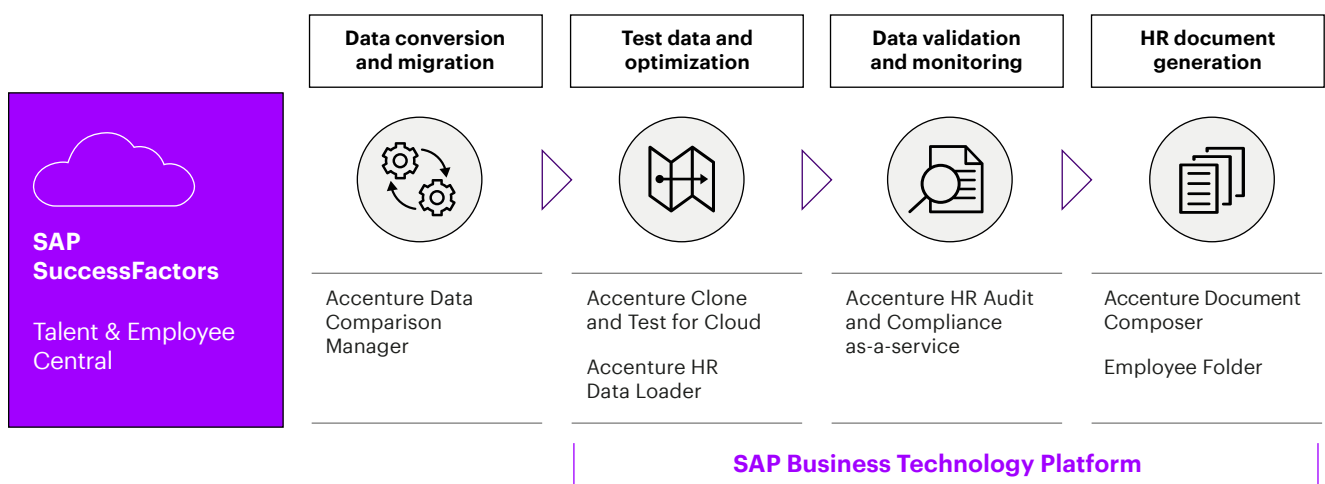
To render a sound assessment of the test results, you need a foundation of meaningful information. When you conduct test runs with small amounts of data, you run the risk of failing to account for a key test case. On the other hand, testing large data volumes requires the help of tools that deliver clearly arranged results for analysis in the form of reports and statistics. Organizations that lack such tools often use Excel spreadsheets instead, which are hardly suitable for large quantities of data.

Why do some companies refrain from switching off their old system when they go live with SAP SuccessFactors? Despite their success in completing the technical migration of their HR data, many have reported needing to keep their old and new payroll systems running in parallel until the new system has been fine-tuned enough to produce the same (or at least more similar) results as the old system. This practice should be avoided as far as possible because of the tedious manual effort of keeping two HR systems in sync.

In addition, some organizations have governing bodies that have to approve any migration project involving HR data. The Accenture corresponding add-on tools enable you to automate the necessary reports, documentation, and test data anonymization in a verifiable fashion. Your HR data will remain within your SAP or SAP SuccessFactors landscape. The CSV files generated for the upload process can be stored on an SAP application server (a secure environment) and then imported into your SAP SuccessFactors system, which reinforces security with respect to policies addressing the moving and storing of data.

Step-by-step Guide to the Cloud

Software add-ons for SAP HCM and SAP SuccessFactors can guide you all the way through your next migration, from the first steps to go-live and beyond. You can reach your objectives while saving time and avoiding unnecessary errors and project delays. By eliminating manual steps, your data can be more reliable, your processes more automated and repeatable, and your results far easier to analyze and report on.



Preparing for migration

1. Analyze and cleanse data in your SAP HCM system

An analyzer can identify all of the field values to be migrated in your SAP HCM system and provide valuable input on how much data cleansing will be necessary prior to migration.

2. Define data fields for migration

By creating a picture of the field content that needs to be migrated from your source system, the analyzer will help you design your conversion (field mapping and implementation).

3. Set conversion rules

SAP SuccessFactors provides nearly 30 templates for uploading employee data alone; the system also includes others for basic configuration.

If the field names in your SAP and SuccessFactors systems match, a tool will automatically map the fields accordingly. With the drag-and-drop function, mapping other fields from SAP HCM to those in your target system is quick and easy. Many conversion rules come predefined or can be selected from the default settings. The programming option is always available for special cases.

In addition, rules can be copied and reused for other countries or migration runs.

4. Convert data for storage in CSV files

Conversion rules adapt data to the structure of the target system; the resulting CSV files are generated automatically. Automated data validation functions point out empty mandatory fields, insufficient field lengths, incorrect data formats, and missing implementation rules to prevent errors during the upload process.

Carrying out the migration

1. Upload data into SAP SuccessFactors

The exported data can be divided into smaller files, which prevents the upload process from causing performance problems in the SAP SuccessFactors system.

2. Check data consistency between the old and new systems

The data in the old and new systems are compared automatically. The results are then presented in a clear format that highlights any anomalies in color, making them easy to spot. Having testers classify these deviations also optimizes their processing by enabling the HR team to correct similar errors simultaneously.

Here, the HR team can enter the current processing status to facilitate coordination among the other teams involved and speed up the project. It is also possible to assess the progress of the migration, which makes it easier to decide when to go live.

3. Perform tests in SAP SuccessFactors

The migrated productive data will now be in a secure conversion instance in the SAP SuccessFactors system. Testing the HR processes configured in this system typically involves a parallel SAP SuccessFactors instance that contains test data. Here, the available tools can be used to copy real data from the conversion instance when needed. To allow the test team to work with this data, it is subjected to “smart” anonymization during the copy process, so the test instance is populated with production-like data, while maintaining data confidentiality.

4. Cleanse data following migration

In many cases, you will not have the opportunity to cleanse the data in your productive source systems or otherwise verify its quality prior to migration. This is usually due to the fact that migrations are conducted by global teams that have no authorization to correct errors at the source on the local systems in question. As a result, low-quality data is simply carried over into the new system. Accenture add-ons for SAP SuccessFactors can pinpoint errors to help you fix data issues and perform any necessary maintenance activities.

After migration

1. Set up the test environment, conduct regression testing

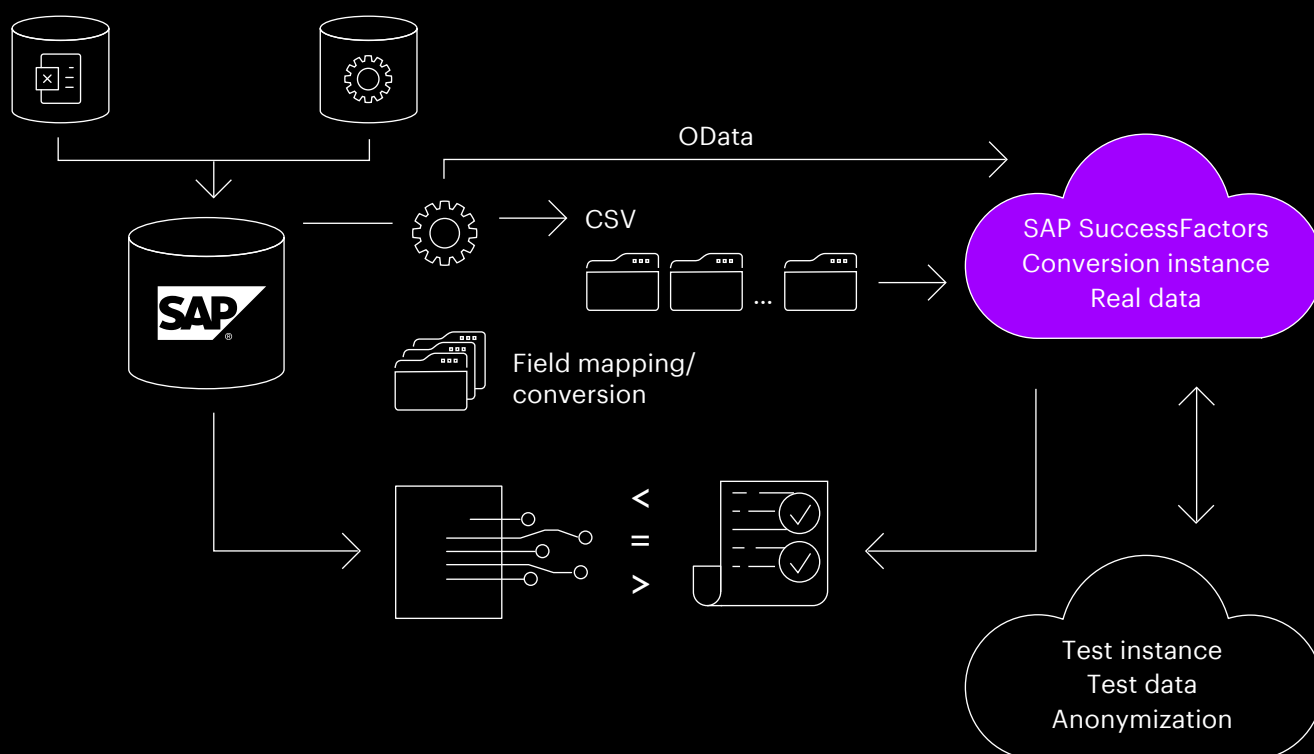
Now that the data has arrived in your productive SAP SuccessFactors system, the system is live. To assemble a test and/or training environment, you can copy data and anonymize it in the process. People and information can be selected based on their relevance to the test case or training exercise at hand.

2. Avoid improper data entry

Since the target system is new, users need to be trained to use it. You can copy and anonymize data for this purpose, just as in testing. The important thing is to maintain the essence of each sample case. An employee should remain an employee, for example, and the anonymization process should protect sensitive personal information without distorting any related data.

3. Inspect data quality on a regular basis

The Accenture SAP SuccessFactors add-ons make it possible to verify whether data is complete and correct. Many users set these checks to run automatically every day to maintain a current overview of data quality.



SAP SuccessFactors is live—where next?

Imagine your pilot project has successfully migrated data to SAP SuccessFactors for an initial group of countries. As you start to use the new system, there are a number of questions you may face:

- Pilot projects typically take on the most straightforward option—in this case, migrating data from an SAP ERP HCM system. For the next country, however, data needs to be migrated from one or more legacy systems. What do you need to keep in mind during the conversion? Is there a tool that can help here as well?
- Has your company acquired another firm recently? Its data may still be stored in an external system and needs to be migrated to SAP SuccessFactors. The data structures involved are almost certainly different. Where and how can you harmonize them?
- Your migration team has done its job. Now, how can you train future users in your HR department or shared service center? Is there a way to generate anonymized training data “intelligently” and produce examples that reflect relevant use cases?
- SAP SuccessFactors delivers two major releases per year. What is the simplest, most efficient method of regression testing?
- Now that you have implemented SAP SuccessFactors, are you also considering switching to Employee Central Payroll? Since Employee Central Payroll is hosted by SAP, you will need to migrate your current payroll system to the hosted system. Many users use this as an opportunity to “spring clean” through consolidation. How can you do so in the simplest way possible? Which aspects of payroll data should be kept in mind; for instance, what about wage types?
- The system is new to everyone, not just your employees in HR or those at your shared service center. After all, more and more data is being entered in SAP SuccessFactors by employees or managers themselves. This makes incorrect or incomplete entries more likely than in your old system. What is the quickest and easiest way to verify data quality while also identifying and correcting errors and their causes?

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