



Data Conversion Relevancy Rules

Conversion COE

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Relevancy Rules – Overview



Relevance relates to the importance of the data to BHE and specifically an affiliate's business. For example:



The count of master data records that have been used in the last 12 months (i.e., a supplier has a PO or invoice in last 12 months)



Data relevance provides insight into the data that is being used, the potential impact to BHE's business, and is a primary input in prioritizing data quality remediation activities (i.e., which data should be updated)



Relevancy rules define and set the foundation for data to be converted into the new target state

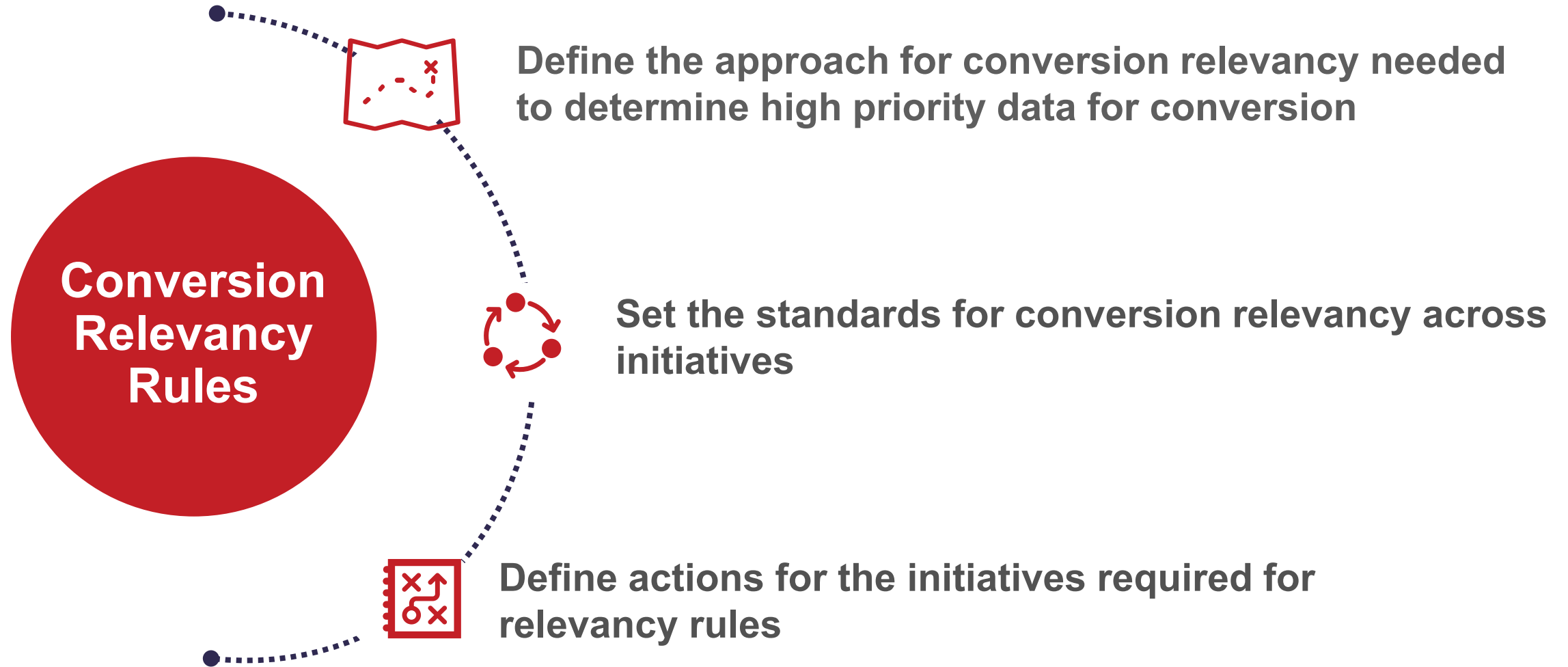


Relevancy rules are critical to user experience and the effort to support conversion activities including sustainment; directly impact the cutover activities (black out) and prioritizes where critical affiliate resources take action

Relevancy Rules – Objectives



The objectives of the data conversion COE – Conversion relevancy rules document are outlined below:



Relevancy Rules – Importance



Data relevancy rules set the foundation for data that will be converted into the new application. Data relevancy enables the following:

Prioritization



Prioritize the data that should be cleansed and more efficiently use the business team to focus on data that has the most impact on BHE's business

Relevance



Enables the necessary set of data to be loaded into the new environment. (removing data that is not needed)

User Experience



Improved usage of the new application.

Timeliness



Reduce cutover time and impacts to the operation due to inability to execute day-to-day transactions.

Time Management



Optimize time required to complete the data conversion process.

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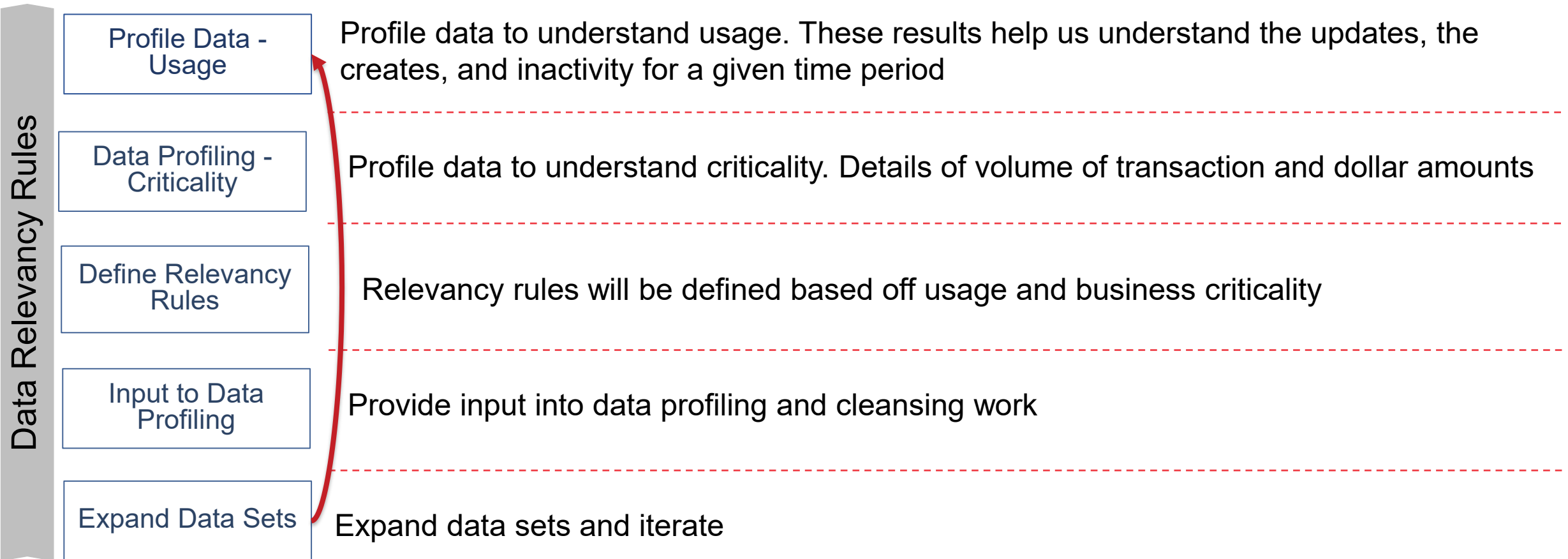


Establishing Relevancy Rules

Data Relevancy Rules – Approach



Highlighted below are the data relevancy rule tasks as they align to the overall data conversion approach



Relevancy Rules – Transactional Example



AP Transaction Usage in past 12 months

Created	20,000
Closed	15,000
Open	10,000
• Opened in current year	5,000
• Opened in previous year	5,000

AP Relevancy

Dollar amount for closed AP	\$150,000
Dollar amount for open AP	\$200,000

Analysis can be done on transactional data to understand the volume and throughout.

Next analysis can provide insight into transactional data that has been open an excessive duration. Data that has been open an excessive period of time is a target for closing in the source system and excluding from the data conversion.

Additional analysis can be done on the transactional data to identify sub optimal process and the potential for additional business value.

Relevancy Rules – Supplier Example



Supplier Master Relevance

Suppliers with invoices/AP in past 24 months	15,000
Total Suppliers	25,000

Overall initial analysis provides insight into how many total suppliers are in the system and those that have complete a transaction with BHE in the last 24 months

Ranked Supplier – Transactions	Volume	Cumulative %
Supplier 1	1500	10%
Supplier 2	1000	16.6%
Supplier 3	1000	23.2%
Supplier 4	500	26.5%

To provide additional insight into the supplier master data, the suppliers can be ranked based on transaction volume and transaction dollar amount

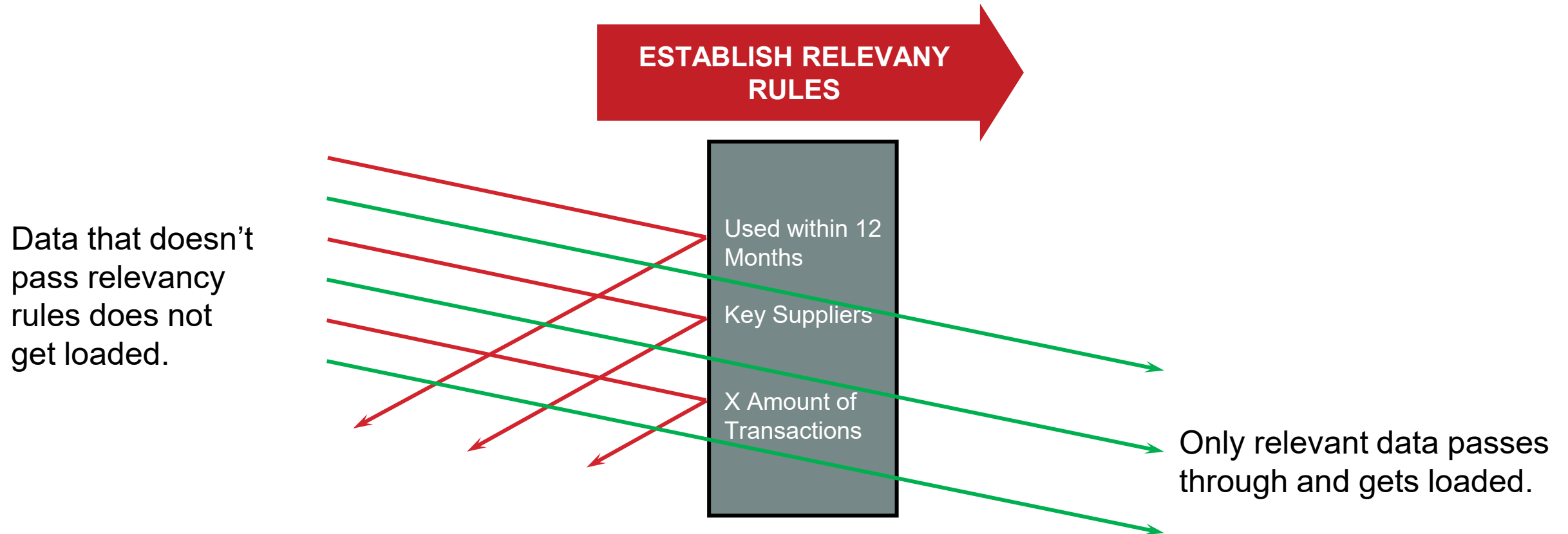
Ranked Supplier – Dollar Amount	Dollar (\$)	Cumulative %
Supplier 1	\$150,000	10%
Supplier 2	\$140,000	16.6%
Supplier 3	\$100,000	23.2%
Supplier 4	\$90,000	26.5%

This ranking helps to prioritize where data cleansing is required

Relevancy Rules – Establishment



By cross checking master with transactional data, it is possible to eliminate unnecessary data and make sure all the active master records are considered in the process



Relevancy Rules – Recommendations



Outlined below is a set of standard recommendations for master data and transactional data.

#	Business Area	Data Object	Relevancy Rule
1	AP	Supplier	Exclude suppliers from the conversion that do not have an AP transaction for the last 36 months
2	AP	Supplier	Prioritize data cleansing based on impacted dependent conversions
3	AP	PO	Exclude all closed purchase orders from the data conversion
4	AWM	Work Order	Exclude work orders that are open but have not been updated in the last 12 months
5	AWM	Work Orders	Exclude all closed work orders from the data conversion
6	FIN	GL	Convert detailed transactions for the current year. Convert month-end balances for the year prior to go-live. Convert year-end balances for prior year-end.
7	SCM	Items	Exclude items from the conversion that that do not have on-hand / transactions for the last 36 months

Relevancy Rules – Standards & Actions



Outlined below are the proposed relevancy rule standards and recommended actions for each initiative

Standard	Action
Profile data to understand usage and determine importance	Profile data for counts of data updated in the last 12, 24 and 36 months
Prioritize data cleansing based on impact to affiliates business	Define rules to prioritize data based on impact to affiliate business (asset type, volume of business)
Support regulatory requirements	Identify regulatory requirements that result in the need for active data loaded into the new system
Apply relevancy rules to all master and transactional data	Review design documents to confirm rules for all master and transactional data
Identify any exceptions to standard relevancy rules to account for uniqueness in the business	Identify key business scenarios that should be captured outside of standard relevancy rules (i.e., customer with outstanding balance over \$100)