

## Making Solid Data Conversion Decisions

When implementing a new HR/Payroll system, converting data from your current system is a major task and the choices you make about what data you move is not as obvious as you may believe. The choices can free your system to fulfill your future vision, or bog it down forever.

There is required data which must move into your new system. Employee demographics, year-to-date payroll balances, current job/supervisor/performance rating, etc. Where the choices come in is all around historical data: what data to keep, and what to let go of.

Do you migrate all of your data to the new HRIS—even historical data that is 5, 10, 15 years old—or do you only transfer more recent data and figure out an alternative solution for when you need to access legacy information?

### Clean Sweep Your Data

The decision-making process you go through to determine what data to take with you will require that you not only take a look at your current needs, but also how you plan to manage your systems and data in the future. Thus, when deciding what data to migrate to your new HR/Payroll system, ask yourself a few questions:

- Are you using this data?
- How frequently do you have to access this data?
- How and what are you using it for today?
- What will you be using the data for in the future?
- Will the extra cost and hours prove worthwhile once the new system is up and running?

Perhaps you receive a lot of requests to pull old W2 forms of former employees, or you have several longer term employees and their performance records go back many years. You might be asked to pull the last ten performance reviews for an employee being considered for an important promotion.

On the other hand, maybe these requests filter in sporadically (if at all) over the course of the year. Is it worth converting all of your historical data for the handful of requests you might receive?

Another factor that will impact whether or not you migrate all of your data—or just a subset of it—is how your business requirements have changed over the years. In “Preparing your Data for an HRIS migration,” the HR blog Navigo cites data quality and quantity as deciding factors.

“If your system and the new system will display the same fields (standards like First Name, Last Name, Address, plus more in-depth stats like performance rating or job experience, for example), and your data is 100% accurate and up to date, then fantastic—you don’t need to clean up your data.”<sup>1</sup>

This is likely not the case for most HRIS systems. You could have a different job coding scheme or new fields that didn’t exist five or 10 years prior. Organizational units that existed in the past may now be obsolete. Most certainly, benefit plans have changed. All of these factors are going to seriously complicate the data conversion and new system configuration. All of the old values will need to be added to the validation tables in the new system! Is that old data still worth it?

## Is It All or Nothing?

One other factor in your data conversion decision is: *if I don’t take it with me, will I lose it?* If the answer is yes, then that changes the conversation for some folks.

Many vendors will allow various options to have “legacy” access to your data on the old system—in some cases, you will be allowed total entry into the old system, while in others you might have limited (but adequate) access. An alternative may be to build a historical data repository and migrate all of the history—without associated data validation tables—into that system. You’ll have to decide if one of these solutions will fit your needs, now and in the future.

## Starting Fresh on Your HRIS

Ultimately, every company needs to weigh the pros and cons of migrating data to a new system. But what can you gain from only migrating some of your data? For one thing, it’s an opportunity to start fresh on a new system.

“The conversion process often presents opportunities to streamline business processes, improve procedures and cut HR costs,” writes Jennifer Taylor Arnold in HR Magazine.<sup>2</sup>

If you do it right the first time, you’ll reap the benefits of an improved, streamlined, and accurate new HR/Payroll system. But getting it right means planning for the conversion, assembling a knowledgeable team to oversee the transition (or hiring an experienced

<sup>1</sup> <http://blog.navigo.com.au/author/peter-forbes/>

<sup>2</sup> <http://www.shrm.org/publications/hrmagazine/editorialcontent/pages/0607hrtech.aspx>

consulting partner), having an informed rationale in place for what data is useful and what is not, and allowing time to “scrub” the data you want to convert to make sure it’s accurate and up-to-date when it is migrated to the new system.

