

Appendix 2: LPPA submission – approach to data cleansing, migration and onboarding

Phase 1 - Project Definition

It is essential that a project of this size is well scoped and understood by all stakeholders. During this phase, LPPA will create a Project Definition Document (PDD); this documents the scope, deliverables, assumptions, prerequisites, exclusions, milestones, activities and approaches into a working document. It forms the foundation for delivery of the project. The project plan and risk log will also be created during this stage to reflect the information and approach agreed during the technical scoping sessions. This ensures that the project only commences once all stakeholders have agreed the scope and approach, avoiding uncertainties arising later in the project. Including:

- Initial scoping meeting and preparation
- Review of information / produce initial documentation
- Scoping meeting and clarifications
- Finalisation of documentation to signoff

Phase 2 - Conversion Systems Configuration

LPPA will build two conversion systems containing LGPS “best-practice” processes. The high-level activities will include but not be limited to:

- Creation of two new project environments
- One remains static with test used for testing.

Member data will be added during phase 3.

Phase 3 - Migration of Data and UAT

Involves loading all admin/payroll data at one time as it is anticipated that the ceding provider uses the same software system for both administration and payment of pensions. This is a proven process will mirror what will happen during the live migration.

- Data to be provided in a specific format to allow use of standard migration tools
- LPPA to perform a gap analysis and a data mapping exercise to highlight data issues, for example, reconciliation errors between pension/payroll data.
- Data cleansing by LPPA of highlighted data exceptions.
- LPPA to import the data based on agreed mapping document into environments for testing.
- It is assumed (based on LPPA’s knowledge of Altair data) that there will be three conversions in total i.e. 2 test and 1 live. This could change depending on the quality of data, in which case the costs would be adjusted accordingly.
- Sample image extract and indexing data provided by H&F, LPPA will agree the layout of the index file during Phase1.
- LPPA to upload sample images into UPM.
- Control totals will be generated to enable LPPA/H&F to confirm the number of members transferred and number of data tables transferred.

- Includes payroll running with each data migration.

Once complete, LPPA/H&F would agree timescales for live migration.

Phase4 Go-Live

The requirements for go live will be agreed and planned once each phase have progressed and are close to completion. It is assumed that images will be migrated once the live member data has been completed

The project will be managed by LPPA with the only dependencies on H&F being:

- Provision of:
 - data extract files per conversion
 - a sample/final image extract
- Relevant person to:
 - Participate in Project Board governance calls/meetings
 - Provide response to unresolved queries
 - Liaise with / manage relationship with Orbis to enable LPPA to perform a GAP analysis