Faster data migration for pension provider

A complex migration of auto-enrolment pensions records is successfully achieved using Transformer

The challenge

A leading provider of pensions, investments and insurance provides a pensions auto-enrolment service to about 100 corporate businesses.
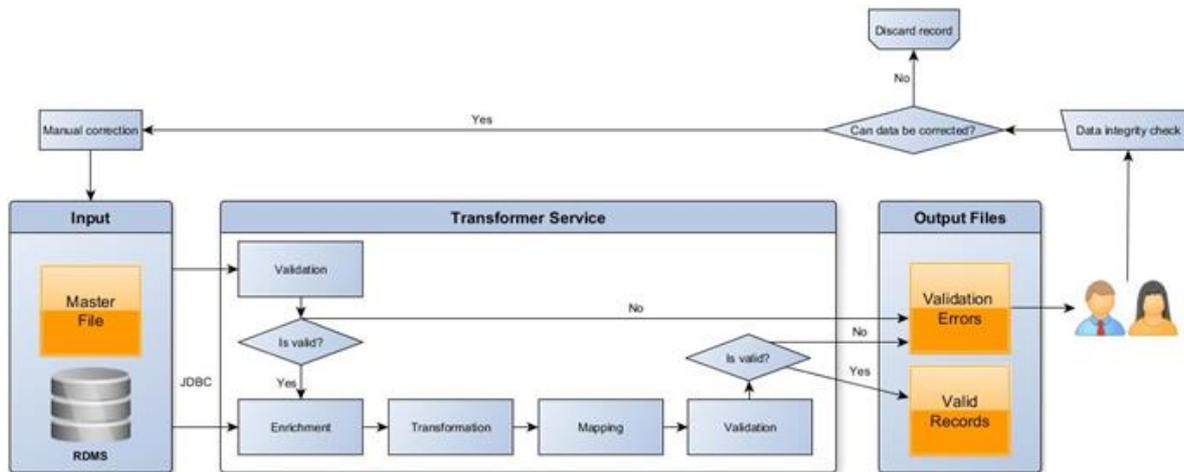
These corporate clients supply monthly payroll data to the service, which assesses each member of staff for eligibility under the (Pensions Act 2008) rules, and where appropriate auto-enrols them into the relevant pension scheme.

In 2013 the service provider decided to migrate the IT infrastructure for this service to a new application and database. A major data migration project was required, involving hundreds of thousands of records, and it would need to reliably apply many complex business rules, validations and enrichments.

A key complexity of the migration project was the need to extract and analyse multiple data items from the legacy database, and, by analysing this data, to synthesise an overall eligibility status for each person.

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The solution

The service provider licensed Transformer (using a bespoke single-project agreement) to carry out the main data processing tasks of the migration. The service provider's IT staff liaised with Trace Financial experts to quickly create the complex data validations, enrichments, transformations and mappings that were needed.

Transformer first read the core data from a Master file as a stream, and then enriched this by performing a set of SQL lookups (over JDBC) to obtain a range of ancillary information.

A detailed validation at this point ensured the coherence of the data thus far collected, so that a valid output record could be created. Any failures generated a validation error report for manual investigation, repair and resubmission.

Datasets which passed this first test were then subjected to the core transformation process in Transformer, to create the output record in a convenient format for subsequent import to the new system, following which this output was subject to a further and final validation.

The output included a synthetic numerically-coded value for each staff member's overall eligibility status, as there were multiple possible outcomes depending on data combinations found. The new system could determine how to import the record on the basis of this value.

With Transformer's help, the data migration project was successfully completed during 2014.

About Trace Financial

Trace Financial Limited are leading specialists in financial message transformation and have been designing, implementing and supporting mission critical solutions to the financial industry for over 30 years. Trace Financial is part of the privately-owned Trace Group.