

# Data Validation for Accurate Reporting

## Case Study:

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### ► OVERVIEW

1. Customer: Confidential/Withheld
2. Business Challenge: Efficient and reliable Project reporting
3. Service Featured: Delivery of robust monthly reports
4. Business Process involved: Internal Project Controls process
5. Benefits realized: Improvement in accuracy of reporting
6. Areas of Impact: Project Controls

## CHALLENGE

Client has rolled out a new WBS in programme management to facilitate consistent monitoring, reporting and cost data capture against projects across business portfolios. Going forward, all the new schemes will be structured using this new WBS. For all in-flight schemes, to avoid a major rework of the programmes in aligning to the new WBS, they needed a solution which validated the accuracy of alignment during the transition of data from delivery vehicles programme to client programme as well as achieving standardization across the complete portfolio.

## SOLUTION

This rolled up programme information is transferred to the new desired level programmes-Baseline and Current Programme created in the Client instance of the Primavera Central Database.

To streamline the information received from the Delivery Vehicles, our client agreed on several criteria which must be met before data can be migrated to their Database For data validation and accurate reporting, these criteria are:

- ▶ Confirmation on availability of Project-ID for desired level Comparison
- ▶ Is Data Date correct including hours? (time stamp should be: 01/mm 00:00 hrs)
- ▶ Is WBS mapping done as per agreed Client WBS coding?
- ▶ Is Baseline budgeted cost available?
- ▶ Is Agreed baseline attached to the current schedule?
- ▶ Scheme available in right EPS node – (Client Reporting)
- ▶ Are Mandatory Milestones available?
- ▶ Do all Activities and Milestones have Baseline Dates?
- ▶ Have the appropriate naming conventions have been used with the correct I.D's.
- ▶ Check that no filters are set on Delivery Vehicle schedule and that the baseline is assigned.
- ▶ Check that all activity codes have costs assigned to them, except the “N/A” activities which must not have costs.

## IMPROVEMENT

The implementation of data validation process on data set before migrating to the client database has helped us in streamlining and improving the migration process and timeline respectively. The solution also reduced the overall amount of effort required to complete the process on time each month.

## CLIENT BENEFIT

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A continuous drive using innovative approaches to release inefficiencies from the existing migrating process , has enabled improvements in overall accuracy, which, in turn, has increased confidence in reports produced and helped overall business / project decision making.