

Migrating from Oracle DRM to Informatica R360 for Finance Domains

Business Case Study

1. Summary

For the organizations prioritizing cloud adoption, enhanced governance, self-service capabilities, seamless integration, and AI-driven automation its ideal to migrate the Legacy **Oracle Data Relationship Management (DRM) to Informatica Reference 360**.

LumenData's **DRM Migration Toolkit** will cover core finance data domains—including Profit Center, Account, Cost Area, Geo Markets, Legal Entity, Statutory Location, and their hierarchical structures—supporting Statutory Reporting, Planning Budgeting & forecasting, Allocations, Reporting & analytics business processes. **The objective is to enhance data governance, improve integration capabilities, and streamline decision-making processes while reducing maintenance overhead, risk and improve business agility.**

2. Background and Context

Current Environment

Oracle DRM has served as the backbone for **supporting master data and their relationships needs** for customer's finance systems & business processes. However, the system's limitations in scalability, flexibility, and real-time integration have become apparent as business needs evolve.

DRMs' adoption of the new data model would require significant time and cost investment while potentially not being the optimal strategic solution for the customer as an on-prem, end-of-life platform.

The existing Oracle DRM system:



- **Struggles with Flexibility:** It is challenging to manage dynamic changes in financial hierarchies, such as shifting profit centers or evolving statutory locations.
- **Increases Operational Overhead:** Customizations and workarounds required to align DRM with business needs have led to increased maintenance costs and higher risk of data inconsistencies.
- **Limits Scalability:** As data volumes grow and reporting requirements become more complex, DRM's scalability constraints could result in performance bottlenecks.
- **Impedes Integration:** The current setup does not easily support real-time data integration with planning systems, SAP actuals, and enterprise reporting tools.
- **Lacks Governance Capabilities:** Limited data governance & maintenance capabilities such as approval workflows.

Need for Change

Business Drivers: Increased data volume, regulatory requirements, and the need for agile business intelligence call for a more modern, integrated approach.

Strategic Imperative: A solution that provides robust data governance while enabling seamless integration with planning tools, SAP systems, and reporting platforms is crucial to maintain competitive advantage and operational efficiency.

3. Objectives of Migration

- **Modernize Data Management:** Transition to a solution that supports dynamic data relationships and rapidly changing business requirements.
- **Enhance Integration:** Enable seamless, real-time integration with planning applications, SAP applications, and business intelligence platforms.
- **Improve Data Governance:** Establish a single source of truth for critical financial domains with robust data validation, audit trails, and lineage capabilities.
- **Increase Operational Efficiency:** Reduce manual interventions, lower maintenance costs, and enhance overall data quality and consistency.
- **Future-Proof Environment:** Build a scalable and flexible architecture that supports future growth and evolving regulatory requirements.

4. Proposed Solution: Informatica R360

Why Informatica R360?

- **Flexibility and Agility:** Designed to manage complex, multi-dimensional data relationships, R360 can easily adapt to changing business hierarchies and financial domains.
- **Enhanced Integration Capabilities:** R360 offers built-in connectors and APIs that simplify integration with Planning system, SAP applications, and reporting tools.



- **Robust Data Governance:** Features such as real-time data validation, automated workflow management, and comprehensive audit trails ensure data integrity.
- **Scalability and Performance:** The platform is built to handle increasing data volumes and complex queries without compromising performance.

Key Features for Finance Domains

- **Dynamic Hierarchy Management:** Supports evolving hierarchies for Profit Centers, Accounts, Cost Areas, etc.
- **Centralized Data Repository:** Provides a unified view of financial data to support planning and decision-making.
- **Real-Time Updates:** Ensures that any changes in the master data are immediately reflected across connected systems.
- **Self-Service Capabilities:** Empowers business users to manage and update data relationships without heavy IT intervention.

5. Migration Strategy and Implementation Plan

Phase 1: Assessment and Planning

- **Scope Definition:** Identify the finance data domains and hierarchies to be migrated.
- **Stakeholder Engagement:** Involve key stakeholders from Finance, IT, Planning, and Reporting teams.
- **Gap Analysis:** Assess the differences between current DRM functionalities and Informatica R360 capabilities.
- **Risk Assessment:** Identify potential migration risks and develop mitigation strategies.

Phase 2: Design and Development

- **Solution Architecture:** Develop a detailed architecture that includes data models, integration flows, and security measures.
- **Data Mapping:** Define the mapping of existing Oracle DRM data structures to the Informatica R360 model.
- **Customization and Configuration:** Configure R360 to meet specific business rules and data governance requirements.
- **Integration Design:** Develop integration connectors and APIs to interface with planning systems, SAP, reporting tools and other operational consumers.

Phase 3: Testing and Validation

- **Unit and System Testing:** Validate data mappings, transformation logic, and integration points.



- **User Acceptance Testing (UAT):** Engage end users to test functionality and ensure the solution meets business needs.
- **Performance Testing:** Ensure the new system can handle expected data volumes and real-time processing requirements.

Phase 4: Deployment and Post-Go-Live Support

- **Cut-Over Planning:** Execute a phased migration strategy to minimize disruption.
- **Training:** Conduct comprehensive training sessions for IT staff and end users.
- **Monitoring and Support:** Set up ongoing support and monitoring to address any post-migration issues and fine-tune the system.
- **Continuous Improvement:** Establish feedback loops to continuously optimize system performance and data quality.

6. Benefits and Outcomes

Business Benefits

- **Enhanced Decision Making:** A unified, accurate view of financial data improves planning, reporting, and strategic decision-making.
- **Operational Efficiency:** Reduced manual interventions and maintenance overhead free up resources for strategic initiatives.
- **Regulatory Compliance:** Improved data governance supports compliance with financial regulations and audit requirements.
- **Cost Savings:** Long-term savings due to reduced operational complexity, faster reporting, and streamlined data management.

Technical Benefits

- **Improved Scalability:** The platform's scalability ensures that it can grow with the business.
- **Robust Integration:** Seamless data flows between Informatica R360 and other enterprise systems reduce data latency and errors.
- **Data Quality and Consistency:** Enhanced validation and audit trails improve overall data quality and reduce risk.

7. Risk Management and Mitigation Strategies

Data Integrity Risks:

Mitigation: Conduct thorough data mapping and reconciliation exercises; implement robust validation rules and audit mechanisms.



Integration Challenges:

Mitigation: Leverage Informatica's proven integration frameworks and run parallel testing with critical systems (e.g., SAP, planning applications).

Change Management:

Mitigation: Develop a comprehensive training and communication plan to ensure smooth adoption among end users.

Project Timeline and Budget Overruns:

Mitigation: Implement agile project management practices, maintain clear milestones, and monitor progress closely with stakeholder reporting.

8. Conclusion

Migrating from Oracle DRM to Informatica R360 represented a strategic investment in customer's financial data management capabilities.

By adopting R360, the organization benefited from a **scalable data model**, **enhanced data governance**, **improved integration with key systems**, and a solution designed for the **evolving needs of finance and planning functions**.