



# Your Journey to Systems Integration

# Speakers

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# Today's Challenges

- Multiple Systems Need Data
- Need Information NOW!
- Manual Entry vs Automation

## Why Update Data (examples)

- Calculate Taxes Correctly
  - Correct Jurisdictions Assigned
  - Tax Categories at Max
- Terminations Updated
  - Shares Canceled appropriately
  - Prevent Accidental Exercises

# Where Does Data Come From?

- HR
- Payroll – Multiple Systems
- Stock Administration
- Stock Purchase
- Excel Spreadsheets



# Data Types

## Demographics

- Address
- Hire Date
- Termination Date
- Termination Reason
- Department
- Employment Status
- Various Codes

## Payroll

- YTD Taxes
- Tax Types
- Transactional Taxes
- YTD Compensation
- ESPP Enrollment
- ESPP Contribution



# Data Entry Styles

## Manual Entry

- Simple but time consuming
- Prone to errors
- User has total control of entry
- No IT involvement

## Automation

- Once it works, it just works
- Driven by System of Record
- Setup can be complex
- Understanding file layouts
- Audit control

# Automation Benefits

- Helps you avoid costly and embarrassing payroll mistakes
- Integrates and controls disparate source systems
- Shortens the close cycle
- Puts control in the hands of the HR/Payroll Manager
- Frees your data entry time so you can focus on more important tasks



# System Considerations

- Integrate HR and payroll to your stock plan and stock purchase system(s)
- Create and Populate Appropriate File Layouts
- Drop-Off and Pick-Up Files
- Data Changes
- Notifications on Status
- Follow IT/Infosec Standards

# Data Considerations

- File Formats
  - HR / Payroll to SOA
  - SOA to Payroll
- HR /Payroll Data vs SOA Requirements
  - Required Fields
  - Pre-defined Values
  - Mappings

# LivingSocial.com Case Study

- Starting from ground zero:
  - Figure out what we have awarded
  - Find a system(s)
  - Find the data
  - Clean up the data
  - Install the system
  - Educate the employees

# Accenture Case Study

- Beware the demons of decentralized data damaging your database
- You need to step back from your day-to-day and assess your situation from a tactical point of view
- Never stop asking yourself or your team “how can this be done better”
- Misery loves company – vent to colleagues
- How do you get Leadership buy in to implement (pay for \$\$\$) change?

# Cummins Case Study

- Is automation a realistic possibility?
  - Collaboration of data sources
  - Historical information
  - Phased approach
  - Be patient, it takes time to work out the kinks
- Increased customer satisfaction
- Ease of extracting information



# What Else Can I Do With the Data

- Reporting
- Grant Approvals, Recommendations
- Communications

# Questions



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