

# UCT

Experience. Methods. Tools.

**All you need for Success**

Data Migration Planning

Data Migrations Projects

Release Upgrades

## Trusted



**UCT is the leading service provider for data conversion and integration in the financial services marketplace**

UCT was founded in 1992 by Dan O'Hara and has provided conversion support to many of the world's top financial services Companies.

- › AegonUSA
- › Allianz
- › American General
- › American National
- › American United Life
- › Ameriprise
- › Assurant
- › Canada Life
- › CUNA Mutual
- › EDS SolCorp
- › Fortis
- › GE Capital
- › Great American
- › ING
- › Majestic
- › MONY
- › Nationwide
- › New York Life
- › NYMAGIC (MMO)
- › Pacific Life
- › Safeco
- › se2
- › Securian
- › Thrivent
- › Western National
- › **and many others**

## Exceptional

At UCT our focus is data migrations. Because of this, we differentiate ourselves in a number of ways.

- › **Deep insurance product understanding**
- › **Superior custom tools**
- › **Agile project approach**
- › **Most extensive testing approach in the industry**
- › **Proven delivery model**
- › **Standards Based**

**UCT strongly supports industry standards like the *ACORD XML standard schemas***

- › **Vendor & Tool Agnostic**
- › **All Vendors**
- › **All Platforms**
- › **All Systems**
- › **All Data Storage types**

***Give us a try.  
You'll be glad you did.***



UCT is a proud sponsor of Habitat for Humanity®

# Experience you can count on

## **We've seen it before**

Our staff members have worked on every vendor-supplied system in the life insurance marketplace and home-grown systems, too. We have also handled Property & Casualty, Workers Comp, court record management systems, HIPAA, and other government applications.

## ***Data Conversions and Migrations are our business!***

## **We can do it better**

Whether you need a turnkey solution or just want a little help on one phase, UCT is there to provide as much or as little as you need:

- **Project management**
- **Project planning and analysis**
- **Data auditing and cleansing**
- **Data conversion/migration**
- **Data balancing**
- **Tools and tool training**
- **Programming**
- **Business support**
- **Technical support**

## **Trust the Experts**

**At UCT, our conversion experts have an average of more than 25 years of industry experience.**

Experience and knowledge are the keys to a successful conversion and they are hard to find. At UCT, we have cross-system knowledge and programming expertise but the most valuable thing we provide is knowledge about the most successful ways to convert and migrate data gained through many years of experience. You need that knowledge for success.

- **You need accurate estimates and timelines**
- **You need experts that know systems and know where to look for customizations**
- **You need a conversion process that has been thoroughly tested, has been used before, and is known to be successful**
- **You need migration experts that know what problems to anticipate, what workarounds are successful, and how to change data so it can be moved between systems**
- **You need programmers that know how to extract and load data into your systems**
- **You need UCT**

UCT has successfully completed over 200 conversion projects. From that experience we confidently predict that we will reduce your time frames and estimated costs by 40% - 60% and that we will successfully convert in excess of 99.9% of your data.

***Disciplined project execution.  
Exceptional results.***

# A Methodology that Works

## Overcoming the problems inherent to Data Migrations

**The UCT methodology is different because it emphasizes the role of the business analysts, clarifies and minimizes the role of the programmers, makes actual data visible early in the lifecycle, and automatically creates documentation.**

### **The traditional software development methodology does not work for data migrations**

*Business analysts, not programmers, have the real system knowledge.* Because of this, a conversion without UCT results in a costly codependence between the business analysts and the programmers as they try to work together to evolve the high-level design, detailed-design, and implementation into a workable conversion system. If the legacy system is particularly aged then what was unknown about the system becomes all too clear when testing begins and the team must repeatedly return to the drawing board to try to resolve the new data problems.

### **UCT's methodology and tools turns the business analyst into a programmer**

They record the business logic for the conversion in a 4GL language which is automatically turned into source code. They do not have to repeatedly return to the programmer for code modifications and improvements, which reduces the number of key personnel responsible for the development of a source code module. In turn, the programmer is allowed to focus on the I/O aspects of the conversion (or the Extract and Load portions of an ETL project), which attempt to reuse system-specific I/O APIs wherever convenient. *This segregation of responsibility reduces the required number of programmers and drives down costs.*

### **Making the data visible early is important to a successful conversion**

In the UCT methodology, one of the first phases is data analysis and auditing. In this phase, the business analysts use reporting features and rules to create code that highlights data anomalies or any unexpected data characteristic. Since this is the first phase, data cleansing can be started immediately to "fix" data in the legacy system and the conversion maps and associated code modules can use the information to correctly handle all data permutations the first time. *Understanding how the system differs from your expectations and correctly coding things the first time drives down costs and shortens timelines.*

### **The methodology results in the automatic creation of documentation**

At the end of a project, all of the business rules are encapsulated in a set of "datamaps". Each datamap handles the conversion of a subset of business data and is written in a 4GL language that non-programmers can easily read and understand (and create). It is invaluable for design walkthroughs, code walkthroughs, and post-project documentation. *Since the datamaps are used to automatically create code modules, the generated code is perfectly documented.*

***Difficult problems call for Agile solutions***

# Data Conversion Architect

## Tools that do the work for you

### DCA is Central to the UCT Methodology

**DCA complements the UCT Methodology by automating many common tasks.** The tool's primary role is to allow team members to work together to collect simple business logic expressing auditing, conversion, and balancing actions. When the logic is mature, DCA turns it into complex source code that handles data type conversions, detects and reports errors, and is well structured and ready to be compiled and executed. One line of logic may generate many lines of source code and the logic serves as excellent documentation for walkthroughs, etc. DCA also includes:

- ▶ Automatic code generation
- ▶ Project Management features
- ▶ User Management features
- ▶ Full error reporting and analysis features
- ▶ Library of reusable code elements
- ▶ Database DDL processing services
- ▶ Schema-based XML stream creation features
- ▶ Complete auditing and balancing map
- ▶ Transaction creation and handling services
- ▶ Internal and external table management
- ▶ Conversion platform synchronization
- ▶ Project archiving and backup services

The screenshot shows the 'Data Conversion Architect' application window. On the left, a 'Logic Map' displays a tree view of project components like 'DCA (5)', 'CODCPROJ (4)', and 'CPOLMAST'. The main area shows a logic map for 'CURRENT-MODE-PREMIUM' with a 'Mapping Help' button. Below the map, a 'Generated Code' window displays the resulting SQL and PL/SQL code, including logic for handling errors and data truncation.

The screenshot shows two Microsoft Excel windows. The top window displays a summary report with columns for Index, Type, Message, Count, and Owner. The bottom window shows a detailed report with columns for Index, Comment, Status, Record, Value, and Sample Object.

Index	Type	Message	Count	Owner
1	MAP	Prepared for demoadmn on Tuesday, July 15, 2008		
2	CCLADDR	Error ZZZZZZZZZZZZZZ - MOVE non-numeric alpha to numeric field	1035	demoadmn
3	CCLADDR	Warning Auto 88-Level Audit Failure: MARRIED-CODE OF PERSONAL	549	demoadmn
4	CCLADDR	Severe Infinite loop encountered	1035	demoadmn
5	CCLADDR	Warning Auto 88-Level Audit Failure: SEX-CODE OF PERSONAL	304	demoadmn
6	CCLADDR	Warning Auto 88-Level Audit Failure: BIRTHDATE OF PERSONAL	1025	demoadmn
7	CCLADDR	Error INVALID PHONE-NUM	27	demoadmn
8	CCLADDR	Warning Auto 88-Level Audit Failure: REGION OF PERSONAL	1035	demoadmn
9	CCLADDR	Warning XXXXXXXXXXXXXXXXXXXX - Truncation after MOVE	304	demoadmn

Index	Comment	Status	Record	Value	Sample Object
5	-GLOBAL-		UNMARRIED	00000456	
6	-GLOBAL-		UNMARRIED	00000455	
7	Expected A		MARRIED	00000457	
8	Expected A		SINGLE	00000001	
9			DIVORCED	00000450	
10			DIVORCED	00000451	
11	Misspelled R		MARRIED	00000452	
12	???		MARRIED	00000453	
13			MARRIED	00000006	
14	Expected A		DIVORCED	00000008	
15			DIVORCED	00000009	
16			MARRIED	00000010	
17				00000011	
18			UNMARRIED	00000013	
19			UNMARRIED	00000014	
20			MARRIED	00000015	
21			MARRIED	00000016	

**DCA Reporting measures progress.** Code generated by DCA automatically checks for errors and reports problems. Error messages can be viewed and analyzed in either DCA's internal reporting service or its excel-based service. Each of these services presents messages in well-formatted reports and include the ability to "drill-down" into the data from project to map to policy to logic line. **Evaluating the success of your conversion has never been easier.**