

# Data Integration: The Tip of the Iceberg for Supporting CPM Processes

[This article first appeared on the OneStream blog, written by Francisco Amores Torres](#)

It is the structure that binds any CPM process together, including Financial Consolidation and Planning & Budgeting. As an integrated solution architect, I feel that for any CPM project, having someone who can establish a bridge across all stakeholders is critical. Indeed, aligning source system owners with finance teams is one of our major duties.

## Solution Architecture Design's Importance

Data integration should be given the same consideration as the other CPM procedures. That encompasses all project phases, such as analysis, design, construction, testing, and documentation. Depending on criteria such as the number of systems involved or the complexity of the transformations, integration solutions can range from basic to highly complicated. In either scenario, you'll need a design that satisfies all of the specifications. That is when the journey to achievement begins.

Any solution design should meet the following three criteria:

- Scalable and flexible. Businesses evolve. They frequently buy or combine with other businesses, modify their organizational structure, or introduce new source systems (ERP, HR, etc.). We should not develop and create a static solution with a short-term emphasis. New needs should be ready for the solution, and it should be able to fit in without interfering with current ones.
- High-Performance. The majority of CPM processes are critical to a company's operation. The financial consolidation performed during the month-end closure is a good example. Financial controllers have a lot of other responsibilities, so it's critical that the process of collecting, processing, and loading data from many sources doesn't become a bottleneck.
- Easy to Maintain. We must never lose sight of the fact that we are constructing an integration for others, not for ourselves. Regardless of the other two pillars, a solution that is difficult to sustain might be considered incomplete. Always strike a balance between scalability, performance, and upkeep.

Having both the functional consultants and the client in a room with a whiteboard is one of the first steps in Aligning Teams. When you have several CPM processes in place and different individuals implementing them, it's a good idea to meet with the client, learn about their data requirements, and discuss how you might satisfy their demands.

While IT and Security teams would typically be involved in vendor selection procedures, the migration

to the cloud means that the finer points of connecting with on-premise systems are generally avoided. When working on the high-level design, it's still vital to engage IT and Security teams so that everyone knows what alternatives are available and how to get IT changes implemented. Identifying if a CPM cloud system can connect directly to a customer's on-premise applications or whether data must be retrieved and stored on a file system is an example.

## How OneStream Supports the Key Data Integration Pillars

OneStream's unified platform offers significant integration features that complement the article's major pillars

- **Scalable and flexible.** The different integration objects may be simply reused or new ones generated without affecting the existing solution when adding a new source system or a new firm to a workflow hierarchy. For example, if a new business pulls data from the same chart of accounts (CoA) as an existing one, the connection and transformation tables may easily be shared between them. This is only one of the transformation engine's incredible features, which allows the solution to be highly adaptable and scalable.
- **High-Performance.** OneStream gives users and administrators the greatest experience possible by utilizing the newest Microsoft technology. For example, owing to OneStream's multi-threaded processes, we can extract and modify huge data volumes in simultaneously.
- **Simple to Maintain.** Integration may be simply established and managed through the user interface (UI), whether it's a Web or Desktop application. Dashboards can also be utilized to customize the solution to fit specific needs. As financial users, we may, for example, export a transformation table, add new rules, and re-import it without the need for IT support.

To assure data quality, several sorts of checks and validation rules may be applied to the workflow. Drill back is another fantastic feature that allows us to navigate to source data in a variety of ways without ever leaving the OneStream interface.

OneStream is the ideal foundation for our integration solution because of these features, as well as others such as a change log and audit.