INTEGRATION PLANNING / ILLUSTRATIVE CASE

Can two systems exchange records without double counting?

The management decision

Give both system owners the same test batch before asking a supplier to quote for a connection. They must agree what should happen when a record arrives twice or arrives incomplete.

A meter reading can reach billing twice, or a job can fail because the maintenance system uses a different asset number. A connection can appear to work while staff still spend hours untangling the consequences. Integration planning lets teams agree which system is responsible for each record and how problems will be handled. That agreement also gives the teams a common basis for asking suppliers to estimate and test the work.

Worked example

Of 100 records sent, five are intentional repeats. The receiving application should create 95 distinct records and record how it handled those five repeats. A receipt for 100 messages alone would leave the outcome unclear.

Example figure	What it represents
100	Records received
95	Unique records
5	Repeats

What changes the answer

If two of the 95 unique records are invalid, expect 93 saved, two rejected and five repeats. Each item has to appear in one of those groups before the batch is signed off.

Integration planning

What to commission

Plan one transfer between two named applications, from the originating record to the receiving team’s check.

We use sample records and available documentation to match fields, agree when each transfer should happen and decide how to handle late, missing or repeated records. We also work through who should be told when a transfer cannot be completed.

How to judge the result

A sample batch accounts for accepted, repeated and rejected entries and identifies who resolves each exception.

Track the correction time and downstream effects of missing or duplicate entries. Compare these costs with the effort to build and maintain the proposed checks.

Decision worksheet

Project detail	Starting point for your team
Decision owner	Operations director or systems owner. Name the person who will approve the next step.
Records to gather	The two systems involved, an example record and what should trigger the transfer.
Agreed output	A specification for the connection, a field mapping and a phased test plan.
Decision date	Record the deadline, any unresolved assumption and who will confirm it.

Discuss this case

Describe what you need one system to send to another and what your team does today when a transfer is missing or wrong. Mention any upcoming software change. A short description of one failed transfer is enough to start.

Email info@oxetc.co.uk and mention IT-03. All figures in the worked example are illustrative.