Accolade

Streamlined data modeling and team collaboration for data governance

Overview

Accolade is the leading provider of Professional Health Assistant services. The company partners with large employers such as Comcast, Medtronics, Lowes and others to simplify and improve healthcare for employees and their families. Through the knowledgeable support of its Accolade Health Assistants™ service, Accolade creates and nurtures personal connections with employees and empowers them to get more value out of the healthcare system and their health benefit plans, which help Accolade's client companies maintain staff and realize long-term cost savings.

When their project began, the Data Management organization at Accolade consisted of 25 people, but was growing quickly to accommodate the company's continued success in acquiring new clients. It was also faced with supporting a number of key business initiatives, including building out an enterprise data warehouse and dynamic reporting environment. Also on the agenda was implementing an enterprise-class ETL platform, two client implementations, upgrading its dynamic CRM tool, and several other corporate projects in which data management would play a key role.

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– Lorraine Knerr,
Vice President of
Data Management, Accolade

APPLICATIONS

- Data modeling
- Standardization
- Data governance

TOOLS USED

- ER/Studio Enterprise

Challenge

Before embarking on those key initiatives, the core priority of Accolade's data management team was to catalog the company's data assets. "Our challenges included cataloging data assets and structures, standardization, and getting a visual graphic representation into all databases we're leveraging," said Lorraine Knerr, Vice President of Data Management.

The company was also in the process of implementing corporate governance, a process for which complete visibility into existing data is essential. "We had poor documentation structure and visibility, and no design standards in place," she said.

At the time, the team did not have any data modeling tool in place. Everything was being done manually, and Knerr knew that they had to automate to rise to the challenges that lie ahead. "Much of our data was in spreadsheets, and uploading those spreadsheets into a table design with corresponding metadata would have overwhelmed our team," she said. "It may have taken two full-time developers at least a month. We didn't have that much time."

Knowing she needed an enterprise-class solution, Knerr began an evaluation of development tools, including ER/Studio. Because the database environment was a mix of SQL, Microsoft, Linux and Oracle, it was important that the tool could support multiple platforms.

"We were creating a corporate data warehouse with a functional data mart on Oracle, which meant we had to move data from SQL Server environments, as well as our core Microsoft Dynamic CRM system," she said. "There was more than a terabyte of data between the integration and reporting layer." All of this had to be accomplished with a team of just 22—four SQL Server DBAs, ten developers, three quality service engineers, three solution architects and two business systems analysts.

One of Knerr's managers had used ER/Studio in the past, and expressed strong support for the toolset, with its enterprise approach to modeling across multiple disciplines and its embedded business process capabilities. Upon evaluating the tool, Knerr was immediately impressed with ER/Studio's web integration and security features, as well as the tool's ability to manage structured metadata and domain definitions.

"ER/Studio's ease of use and superior security interface were big factors in our decision," said Knerr. "Accolade has a strong focus in healthcare, and protecting personal health information is of paramount importance. ER/Studio provided time savings in configuring the database to protect highly confidential data. Additionally, it offered enterprise-class reporting tools that are essential for meeting compliance requirements around standardization."

CHALLENGES

- Optimize time and resources by eliminating manual tasks associated with data modeling

- Implement an ETL platform with support for multiple platforms, including SQL, Microsoft, Oracle and Linux

- Enhance collaboration among DBAs and developers to streamline development cycles

- Create standardized documentation for complex data structures

- Improve visibility into data structures to meet corporate governance requirements

Solution

ER/Studio is the fastest, easiest and most collaborative way for data modeling professionals to build and maintain enterprise-scale databases and data warehouses. Built-in facilities automate routine modeling tasks so users can analyze and optimize database and data warehouse designs faster than ever. With a server-side model management system and online Portal, ER/Studio allows data professionals to easily share, document and publish data models and metadata to distributed teams, while enforcing standards in a shared team modeling environment.

ER/Studio promotes data reuse and collaboration in real-time through effective enterprise model management and metadata publication capabilities. Additionally, ER/Studio enhances visibility and information quality across enterprise systems with round-trip engineering and complete database lifecycle support.

"We're going to use ER/Studio holistically as a starting point for every data project we do," said Knerr. "It provides the breadth of functionality we need to support our multiple platforms."

As an added benefit, several of the members of Knerr's team had worked with ER/Studio before, so there wasn't much of a learning curve for the team. Additionally, the management team had used the product and preferred it over other solutions.

"ER/Studio is a very mature tool with all the core components of an enterprise-class solution," said Knerr. "The interface is very intuitive, so it's easy to search for and find the functionalities you need." And for Knerr's small team, the time-savings provided by ER/Studio was instrumental in helping the team accomplish its objectives. "Where manually cataloging all of our data structures could have taken two full-time employees at least a month, with ER/Studio, the same amount of work only takes one person about a week. That's a tremendous savings, in time, resources and money."

The integrated Portal was another big selling point for ER/Studio. "We're a young organization, and we have a very strong directive to create layers of transparency into our data assets," said Knerr. Through the Portal, the team has real-time access to metadata and information about data usage.

ER/Studio's self-service Portal can be accessed from a web browser for cross-model and repository-wide data definitions and object searches, providing structured browsing and navigation of diagrams stored in the ER/Studio Repository. Developers can easily access data dictionaries, attachments and nested models, and perform simple text searches for all object types and diagrams. The Portal also enables advanced searching for specific object types and projects, and administrators can use the Portal interface to generate models, access dictionaries, or determine data lineage.

"The Portal was one of the key differentiators for the ER/Studio solution," said Knerr. "With ER/Studio, we can control real-time updates via the Portal, which is important for us as a small team—we don't have the resources to do a data pull every time changes are made to the production model. We're still building out our team, and the more automation we have in place, the better."

Knerr's team is leveraging the Portal extensively, which is helping to improve collaboration. "Through the Portal, I can enable the appropriate visibility according to a person's role," she said. "I can provide a business view or client implementation view, for example, which helps to improve cross-focus collaboration across multiple teams."

"With ER/Studio, we can have closer collaboration between architects and DBAs, which improves efficiency and provides the visibility we need. It allows us to do big things with a small team."

– Lorraine Knerr,
Vice President of Data Management, Accolade

Results

In addition to improving collaboration across the organization, Knerr expects that ER/Studio will simplify the process of putting standards in place, while reducing defects.

"Creating a dynamic data dictionary instead of sending out spreadsheets will be instrumental in helping us achieve our objectives," said Knerr. "We'll have a single system of record for business and technical data, so architects and DBAs can work together more efficiently and have the visibility they need to be successful."

Another key benefit for Knerr's team is the cost savings realized from the concurrent licensing model. "The ability to have a dedicated end user for multiple instances of the toolset and Portal enables big savings for a small organization like ours," she said. "We didn't have to invest the majority of our budget on purchasing several li-censes up-front to reap the benefits of an enterprise-class solution. At the same time, ER/Studio will be easy to deploy to new users as the company grows."

ER/Studio has enabled Knerr's team to do more with less. "With ER/Studio, we can have closer collaboration between architects and DBAs, which improves efficiency and provides the visibility we need," said Knerr. "It allows us to do big things with a small team."

RESULTS

- Reduced the time spent cataloging existing data structures from a month to about a week

- Streamlined data modeling by enabling documentation of data structures from various legacy systems using a single tool

- Enabled data reuse and collaboration with real-time access to data using the integrated Portal

- Improved and formalized process documentation, simplifying compliance activities and allowing for the implementation of corporate governance

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