

Data Migration Services

Volume Import

Service	Customer	Business Function	Business Benefit
Portfolio Records	New / Existing	Importing Core 'Static' Portfolio data to your database	To populate a database in a way that is: - <ul style="list-style-type: none"> • Cost Effective – Reducing the cost in time and effort of entering sizeable data sets manually. • Accurate –reduce the risk of human error. • Considered – Data will be checked by experienced staff and any adjustments reported.
Opening Balances	New / Existing	Importing opening Debtor, Cash & Service Charge balances or transactions	To transfer the financial position of a portfolio onto the system, enabling: - <ul style="list-style-type: none"> • Reconciliation of the system to the ancestor system or reported position. • Smooth and timely transfer of operations to the new system. • Reporting to commence from the new system.
Additional Records	New / Existing	Importing Added Value data into your database (e.g. Measurements)	Data held on other mediums such as spreadsheets, etc. may be better incorporated into the system. We can import these records quickly and accurately.
System Records	New	Importing system maintenance tables	Makes set-up faster and easier for larger databases.

Data Management

Service	Customer	Business Function	Business Benefit
Database Shrinking	Existing	Creation of an Archive database followed by removal of historic clients & their transactions in the live database	<ul style="list-style-type: none"> • Produces a streamlined live database containing only current clients' data. • Reduces live database size and increases performance. • Provides a record of historic clients by the creation of an archive database.
Record Re-Referencing	Existing	Assigning new references to existing records within a database	<ul style="list-style-type: none"> • Enables you to re-organize or tidy your reference structure for most existing entities within your database. • Can be used to align multiple databases prior to database merging.

Record Merging	Existing	Merging two or more sets of existing records into one within a database.	<ul style="list-style-type: none"> • Enables you to rationalise your database by merging sets of duplicate records (e.g. creditors). • Can be used to align multiple databases prior to database merging.
Database Merging	Existing	Merging two or more databases into one.	<ul style="list-style-type: none"> • To eliminate duplication of work in multiple databases. • To produce a single source of data for reporting and enquiring.

Other

<i>Service</i>	<i>Customer</i>	<i>Business Function</i>	<i>Business Benefit</i>
Non-Standard data	New / Existing	Bespoke SQL to add records that cannot currently be loaded by the standard import.	To facilitate the loading of types of data specific to your company (including population of screens set up using screen designer).
Data Cleansing	New / Existing	Tidying Addresses and contact details prior to loading	To improve the quality of the data being transferred from other sources.
Data Modification	Existing	Bespoke SQL to update or populate specific fields en-mass within the database	To store newly acquired pieces of data about existing records. To help implement changes to the way you use the database (e.g. population of email addresses in a list of debtor records to enable emailing of demands).
Dataload Training	SDL Users	Training users to use the Structured Data Load facility.	For users who have purchased the Structured Dataload Module – Training to help get the most from this powerful tool.
DMM Training & Consultancy	DMM Users	Training users to use the Data Management Module.	For users who have purchased the Data Management Module – Training to help get the most from this powerful tool.