Modernizing a Property Management Company's Legacy Data Systems

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DATA SERVICES

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Executive Summary

TEKsystems supported a leading property management company in modernizing its business operations by completing a data assessment of their legacy data systems, preparing a migration roadmap and transitioning data to a new storage platform, JD Edwards EnterpriseOne.

Quick Facts

Client

- **Industry:** Real estate development and property management
- **Revenue:** Private
- **Geographic Presence:** Headquartered in Ontario, Canada; provides services throughout the country

Objectives

- Assess current data housed in the client's four existing, siloed data systems to determine the scope of migration services needed
- Prepare a comprehensive roadmap outlining data migration steps to transition data from source systems to JD Edwards EnterpriseOne
- Develop extract, transform and load code to migrate business data to a staging environment in batches, ensuring that all historical data is captured

Challenges

- Meet with business leaders to understand business requirements so data could be mapped correctly before being loaded into the new data system
- Cleanse data prior to migration to eliminate duplicate, inconsistent or inaccurate records
- Coordinate data migration timelines with multiple third-party vendors involved in the modernization project

Results

- Provided a high-performing team that worked on site at the client, off site at an office location and near shore out of TEKsystems' Montreal Solution Centre
- Executed roadmap activities, including data extraction, consolidation, cleansing and mapping, to migrate legacy data records to JD Edwards EnterpriseOne
- Added a QA analyst to our team to help ensure data quality throughout migration processes

Technologies Supported

- JD Edwards EnterpriseOne

Client Profile

The client is a leading, privately held real estate development and property management company based in the Canadian province of Ontario. The client delivers high-quality, strategically located and mixed-use industrial, commercial and residential properties to consumers and businesses throughout Canada. TEKsystems has been a trusted IT services provider for this company since 2013.

Industry Landscape

Data is essential for any organization to successfully conduct business, so it is important that companies have refined data management strategies and robust data systems in place to manage and store this vital information. But as the growing rate of data generation drives businesses to accumulate greater volumes of data, organizations must adapt their data management strategies to keep pace with capacity demands.

A well-maintained data storage system can have sweeping effects across an organization and speed business efficiencies. Regularly evaluating and deduping records can help cut maintenance costs, increase the speed of data searches, and reduce costs associated with storage and backups. It also helps ensure the most timely and relevant data

is always available to the organization so accurate information on past, present and future customers and consumers can be leveraged to facilitate informed business conversations.

But as data systems age, they become slower and more problematic at processing and storing newer information. It's also possible for some archaic data systems to become so outdated that older data might become irretrievable. This could inhibit an organization's ability to successfully execute daily business operations and hurt the integrity of the data businesses heavily rely on. Additionally, organizations that fail to update or modernize their data systems may face fines or penalties associated with extended product licenses or warranty support. Some manufacturers charge businesses extra fees when support for outdated or retired systems or software is needed, which can end up being an extremely costly consequence depending on the size of the organization.

To combat these impediments, organizations must take steps to continually update and, in some cases, altogether replace their aging systems with newer, more modern storage solutions. Product and software currency is extremely important in making sure business operations run smoothly and that organizations have readily available access to the critical information they need to do business.

Situation

The client, a leading real estate development and property management firm in Canada, wanted to modernize and transform its day-to-day business operations by transitioning to a new enterprise resource planning

(ERP) system, JD Edwards EnterpriseOne. Operating on a single, unified platform would allow the client to consolidate their existing business records currently siloed across four legacy data systems. Transitioning to the new

system would foster greater consistency and communication across the organization, allow for more compact information on customers and clients to be gathered in one place, and help enable future business growth.

Prior to implementing JD Edwards EnterpriseOne into the business, disparate records from the current, disconnected data systems would need to extracted and cleansed. Each source system was responsible for a different business function (i.e., accounting, customer relationship management, warranties and order management) and followed its own protocol for documenting business processes and contracts, which meant that the way in which data was recorded varied by system and could not easily be consolidated. Due to the lack of consistency and absence of a formalized data governance and stewardship framework among the systems, there was an abundance of duplicate, inconsistent and disconnected records that had accumulated over the 12 years the systems had been in place. These data quality issues needed to be addressed before data could be transitioned to the new platform. This would be a multifarious process that would require extensive oversight due to the high volume and diverse nature of data each source system housed. Given the overall scope and complexity of the modernization project, the client's IT department was not large enough and did not have the bandwidth to complete a data assessment and migration of this magnitude.

Due to the intricacies involved in the installation, the client would need assistance implementing JD Edwards EnterpriseOne. They also needed a partner to build a customized module to run on top of the new platform that catered to the unique data requirements demanded by the property management industry.

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While the client selected a third-party provider to complete the product implementation and a second provider to build the customized layer to accompany the new platform, they still sought an IT services partner to help with the data component of the system update. The client wanted a trusted partner to create a roadmap on how best to prepare, clean and migrate the massive amounts of data to the new platform and orchestrate the actual execution of the migration.

Solution

Having a longstanding staffing relationship with TEKsystems in which we regularly provided the client with skilled IT professionals to assist with their day-to-day IT demands, the client already viewed us a valued partner for strengthening their business. Stemming from this relationship, the client's vice president of corporate services reached out to TEKsystems Global Services® to learn more about how we might be able to assist in assessing and overseeing the data migration needed for this modernization project.

TEKsystems proposed a two-phased solution to support the client in completing a data migration assessment and subsequent data migration. Both phases would be completed sequentially while the other two third-party providers installed the JD Edwards EnterpriseOne system and created the custom property management module per the client's request.

During the first phase, a TEKsystems practice architect would analyze the client's technical and business operating environments. This assessment would provide the client with insight into the current state of the data, identify gaps in data modeling and determine the scope of mapping and modeling work needed to transition information between the disconnected source systems and JD Edwards EnterpriseOne. Based on our findings, we would prepare a resource and workflow data migration roadmap to outline what steps were needed to extract, cleanse and transition the data to the new platform.

As part of the second phase, we would support the actual execution of the roadmap. Under the direction of the practice architect and a delivery manager, we would provide a highly skilled team that would work on site at the client, off site at an office

location and near shore out of the Montreal Solution Centre (MSC). Key members of the TEKsystems team would perform the following activities during this phase:

- Business analyst: Meet with key client stakeholders to gather business requirements

- Data analyst: Identify mapping and technical components required to develop extract, transform and load (ETL) code

- ETL developers: Write the ETL code needed to migrate data from the sources systems to JD Edwards EnterpriseOne

To ensure that all relevant and historical data records from each source system were accurately captured, our team would complete a series of sprints to extract the data from each system in batches. Each batch would correspond to a different client project / building location. The team would then perform data cleansing and mapping to prepare the data for migration to the new platform. These steps would also assure that any duplicate or inconsistent records were eliminated prior to being inputted into the new system. Finally, we would transition the data to a staging database where the integrator would load it into JD Edwards EnterpriseOne.

Based on our proposed solution and the client's existing confidence in us as a trusted partner, the client selected TEKsystems to support the modernization of its data systems and business operations.

Results

TEKsystems completed a thorough assessment of the client's data within its four legacy systems and delivered a comprehensive roadmap detailing a data migration strategy to transition business records to JD Edwards EnterpriseOne. Leveraging the expertise of our subject matter experts and the highly skilled team working on site, off site and out of the MSC, we successfully prepared and migrated the client's data to the new storage platform. With this business transformation, the client now has a more formalized, structured and efficient system in place for housing its archived data and streamlining its daily business operations.

In order to keep key business stakeholders informed of progress throughout the project, our team leads met with the client's vice president of corporate services on a regular basis. Early in this engagement when discussing project scope and processes, our team identified an opportunity to improve the data quality process. At the start of the engagement, we did not have a dedicated quality assurance (QA) resource in place. But after discussing the proposed migration roadmap with the client around how we would move through the data processing requirements, we saw the value of adding a QA analyst to help ensure that data quality was not lost during the ETL process. The client was grateful for our attention to detail and willingness to expand our original team to bring an added layer of quality to the project.

To deliver cost-effective support, we worked in conjunction with the client's chosen third-party providers involved in the system modernization. While the integrator worked to implement JD Edwards EnterpriseOne, our team worked to prepare the data for migration to the staging database. Depending on the progress of the integrator, as well as the module-building provider, we scaled our team appropriately to keep pace with their progress. Our ability to provide flexible teams allowed us to easily adapt to changes in scheduling and enable timely delivery of data to the staging environment once ready. By also providing support from diverse working locations on site, off site and out of the MSC, we were able to consistently deliver technical support. This team structure aided knowledge retention and minimized the likelihood for attrition among the team.

The client was extremely pleased with the outcome of their system modernization and asked TEKsystems to support additional future business initiatives. We were also requested to provide a second managed services team to provide technical support to assist the client with project management, organizational change management, training and business analysis.

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Key Success Factors

Practice expertise.

Data migrations are a massive undertaking done sporadically during the life of a company, so the client had very limited knowledge about how to initiate and execute a project of this nature and complexity. The practice architect who led TEKsystems' team was extremely knowledgeable about data migration best practices and how to minimize business disruptions during system transitions. Additionally, TEKsystems is an Oracle Platinum and BI Co-development Partner so our team had deep expertise in implementing and working with Oracle products, including JD Edwards EnterpriseOne. This familiarity with the product further aided our execution of the migration roadmap and ensured optimized data migration processes.

Continuous improvement.

TEKsystems continually sought opportunities to improve the modernization effort and deliver additional value to the client. By extracting and consolidating data in batches, we were able to make sure only accurate and cleansed data records were migrated to the staging environment. Through our conversations with client stakeholders, we also identified the need for a QA analyst, further helping to improve data processing procedures and the overall quality of data records being migrated to the new data system.

Flexible teams.

Our team worked seamlessly with the client's multiple third-party providers throughout the engagement. Successfully interlocking with the integrator and module-building providers was critical to the success of the project. This collaborative effort helped ensure that we provided data in a timely manner that corresponded with product implementation and module-build timelines. Our team remained flexible in adapting our project schedule and team in response to changes in the providers' timelines. We were able to ramp our team up or down as needed which provided cost savings as only active resources were billed to the client. We were also able to supply constant and diverse technical support by leveraging TEKsystems' MSC, which helped minimize attrition and promote knowledge retention across the team.

About TEKsystems®

People are at the heart of every successful business initiative. At TEKsystems, we understand people. Every year we deploy over 80,000 IT professionals at 6,000 client sites across North America, Europe and Asia. Our deep insights into IT human capital management enable us to help our clients achieve their business goals—while optimizing their IT workforce strategies. We provide IT staffing solutions, IT talent management expertise and IT services to help our clients plan, build and run their critical business initiatives. Through our range of quality-focused delivery models, we meet our clients where they are, and take them where they want to go, the way they want to get there.

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