

Wynne RentalResult – Data Migration

Methodology

The transfer of data to support business processing from one or more legacy systems to RentalResult can be simply described as an ETL (Extraction, Transformation and Loading of data) process, albeit with many moving parts and entities. To simplify the management effort the data to be migrated is broken down into two types:

- Master Customers, vendors, products, rental rates, etc.
- Transactional Open Payables, open receivables, open rental contracts, etc.

Both of which then further break down into the following categories:

- Static Data that changes infrequently, e.g. Products, Customers, etc.
- Dynamic Frequently changing, e.g. current open rental contracts.
- Historical GL Balances/Detail, paid invoices, Item utilization.

The implementation team would decide the data sets required, define clean up/redundancy criteria and follow an agile process to refine and reconcile each individual data sets ETL which would break down into a 2 step process:

1. Extract & Transform

The inputs to this process are the source data, the criteria to clean and the test plans to validate and reconcile the data to be migrated.

The output of this is a data file mapped to RentalResult API.

2. Load

The inputs to this process are the data file from step 1 and the test plans to validate and reconcile the data loaded.

The output of this are reports for audit and data to support process/function testing and replicable processes for go-live migration.





Depending on the roll out approach used Master, Static and/or Historical data may be loaded prior to go live to effectively increase the 'Live' data migration window i.e. the time is spent working on reconciling/closing legacy transactional/dynamic data and its ETL only.

API's provide for the following data migration methods into RentalResult

Manual	Used where source data is not available or not efficiently usable electronically or where volumes mean no ROI so entered manually via core application.
Take On	En-mass conversion of data from spreadsheets for the go live of a company, region, branch etc. providing data validation modes and detailed audit logs for validation of transfer from legacy system/s.
Batched	Ad-hoc or regular scheduled automated input from configurable spreadsheet/delimited text file.
Web Service	Real time data feed from concurrent systems as and when required.

Each automated method of data insertion utilizes the same business logic as the core application to validate and maintain database integrity and during the implementation process any combination of the three may be used as required. E.g. to test customer migration:

1. Use the take-on API to load all the customers to test the mapping/clean-up of existing data. Repeat as necessary to refine the data quality/accuracy and remove redundant data.
2. Use the batched API to bulk update specific data elements to replicate address update from 3rd party e.g., D&B.
3. Use the Web Service to update specific data elements from internal/external services, e.g. credit score updates.





Typical Data to be migrated for a rental business includes

Data	Type	Mode	Description
Customers	Master	Take-on	The businesses and/or individuals and their locations you rent to.
Receivables	Transactional	Take-on	Open Receivables and X months of closed.
Products	Master	Take-on	SKU's and their attributes.
Assets	Master	Take-on	Rental Fleet, Delivery/Service Vehicles, Fixed Assets including Bulk Items
Rental Rates & Selling Prices	Master	Take-on	Current and future rental rates and selling prices (services, e.g. delivery).
Customer Service Call History	Historical	Take-on	Any and all historical communications with the customers being transferred.
Open Rental Contracts	Transactional	Take-on	All open (on-rent) contracts
Service History	Historical	Take-on	Previous service and/or R&M events
Service Schedule	Transactional	Take-on	Current/Future open scheduled repair/maintenance events.
Vendors	Master	Take-on	The businesses and/or individuals you purchase services, equipment, fleet or re-hire in from.
GL Balances	Historical	Take-on	X years' worth of data to allow current/future comparison vs. historical.
GL Detail	Historical	Take-on	X years' worth of data to match loaded GL Balances.
Item Utilization	Historical	Take-on	X years' worth of data to allow current/future comparison vs. historical.

