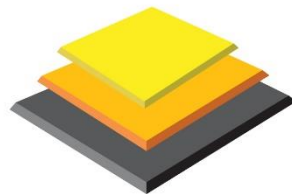


Zavanti Housing Implementation Guide

Data Migration Planning

Zavanti Australia Pty Ltd



Zavanti
Technology for Advantage

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Zavanti - Data Migration Planning

Purpose

This document details the joint planning approach required to ensure a successful transition, with a focus on the migration of data identified from CHP system to Zavanti Housing Solution. Selected and specific data will be migrated to Zavanti Housing Solution using data migration templates and a data import tool that has been developed by Zavanti.

This document provides guidelines which will need to be finalised after the client data migration scoping workshops.

The process of the data extraction is to be confirmed in the client data migration workshops.

Communication & Data Migration Leads

The Data Migration activity will have a key client lead, key team members will include:

CHP	Zavanti
Name, position, email	DM Consultant -email
Name, position, emails	Project Manager -email

Resource and support will be provided where required throughout the migration. Zavanti has a preferred method for maintaining communication pathways but is flexible depending on CHP's needs.

Communication Pathways

Shared Resources

The files, primarily templates and exported data need to be accessible for both parties. Zavanti prefer a SharePoint site, or folder on existing SharePoint to store these files on.

The status of the templates and the data extraction needs to be tracked and maintained for both parties to see. This can be done via a shared excel file, a team board or other process tracking/ticketing software. Issue should also be logged on either a separate file or additional sheet on this file.

Regular Communications

For daily and quick questions back and forth between parties, Zavanti like to set up a migration specific Teams group chat. Any larger issues can be sent via email but for speed and ease the teams group chat is very useful.

Zavanti recommend regular weekly or fortnightly calls between key stakeholders in the process. These have been very productive and can be used to flesh out more complex issues that require multiple people's insight. But also, for simple progress updates and revisions of timelines.

Timeline projections for migrations dress rehearsals can vary between CHPs but most initial runs will take more than 40 days from templates being populated to data acceptance testing finishing. Each following run reduces in length but the biggest factor in reducing the time of each process is the staffing resources allocated to each aspect of the process.

Data cleansing

General Data cleansing

Data cleansing activities need to be performed by CHP in preparation for Data Migration to ensure clean and accurate data is imported into the Zavanti solution. Suggested tasks to perform are documented below.

1. Finalise a list of what needs to be migrated.
 - a. Review the entities list, confirm CHP which to include applications, work tasks, inspections etc and how much history is to be imported.
2. Specify what needs to be migrated from different sources against list of entities.
 - a. The level of historical data to be migrated needs to be determined. If it is decided not to migrate historical data this will impact the level of reporting functionality with the main impact to financial and property status data. If it is decided to include CHP historical data, additional time for importing data needs to be considered especially for final Go live migration.
3. Develop a Data extraction plan.
 - a. A plan needs to be established for data extraction, the turnaround time for Go Live migration is a key consideration. All data must be able to be extracted from a single point in time to ensure all extracted balances and connecting data is accurate and aligns correctly.
4. Check system and populated templates for duplications.
5. Review and complete any fields with \$0 balances or blank records.
6. The Data type needs to match the field type in Zavanti, for example a free text field in CHPs system might be the source data for a tick box in Zavanti. The templates Zavanti will provide show this information, but it is CHPs responsibility to transform your data into that form, any detail lost in the transformation will be lost permanently.
7. CHP needs to ensure exact matching values for option sets and Master data. All entities within the system must match set values.

Property

1. Assigning the Property type is an essential step, CHP must understand property types and their purpose in the Zavanti system (non-tenantable vs tenantable types) and the hierarchies of properties that are related to the property type.
2. Finalise Program/sub program.
3. Ensure the full property address is complete and accurate to include City/suburb/postcode and program against each property.

Client Data

1. Ensure there are no duplicates in the data. Common areas where duplications are identified are:
 - a. Client Sys ID
 - b. CRN, Confirm no duplicates and exact format.
2. Phone number formatting:
 - a. Some systems have phone 1 & 2 not mobile and home which often contain mixed formatting e.g. +61 25, 0425, 425. Consistent formatting is required.

Tenancy

1. Rent Charges
 - a. Historical values need to cover the period of arrears for a tenancy in order for the opening balance/Paid calculations to be successful. i.e. start date of earliest rent charge < rent paid to date. There can't be any gaps in rent charges from tenancy start date to current date, this applies to property and tenancy.
2. An organisational decision needs to be made by CHP around Tenancy including all transaction types on whether to proceed with an import of all transactions or just opening balances.
3. Ensure transaction type data is complete and accurate.
 - a. Migrating transaction history is the preferred method, but exact mapping of transaction type needs to be locked in early. It is possible for Zavanti to migrate opening balance only, but the date from when they were taken needs to be exact. Opening balances can cause errors with weekly rent charges so this method is not preferred.
4. Time Sensitive Tenancy Data.
 - a. Processes that involve automation or communications to outside bodies such as tenants or contractors need to be considered in the planning of what to migrate. The Rent review process is the highest priority one of these in tenancy, Zavanti recommend that outstanding rent reviews be completed and a pause on new reviews is put in place approaching go-live.

Miscellaneous Data

1. Additional data to be reviewed includes inspections, cases/feedback, work tasks, organisations, non-tenant clients.
2. Time Sensitive Tenancy Data.

Processes that involve automation or communications to outside bodies such as tenants or contractors need to be considered when planning what to migrate. If and how to migrate active Work Tasks and Inspection need to be carefully considered by the CHP. It is strongly advised that these are minimised approaching go-live to aid the migration process.

Provision of Data

Zavanti will provide data migration templates (in csv format) that will need to be completed, the templates and fields will be prioritised by Zavanti and communicated to the client. CHP will extract the data from the source systems and complete data migration templates. Zavanti templates will include lists of option sets and master data values. Zavanti will also include the data type that is required, e.g. option set, Boolean, numeric, text, etc. It is CHP's responsibility to transform the existing data into the required master or option set values within the template.

Once templates are completed these files will be transferred into SharePoint. Zavanti will review the data for any discrepancies, write and update the import code and migrate the prioritised data

templates to populate Zavanti Housing Solution. Zavanti will need a CHP data expert assigned to assist in identifying the data and completing the templates.

Environments Management

Sandbox environment

Used for the testing and development of the functionality within the system. The sandbox environment is continually updated with customisations and CHP data is entered manually.

UAT environment

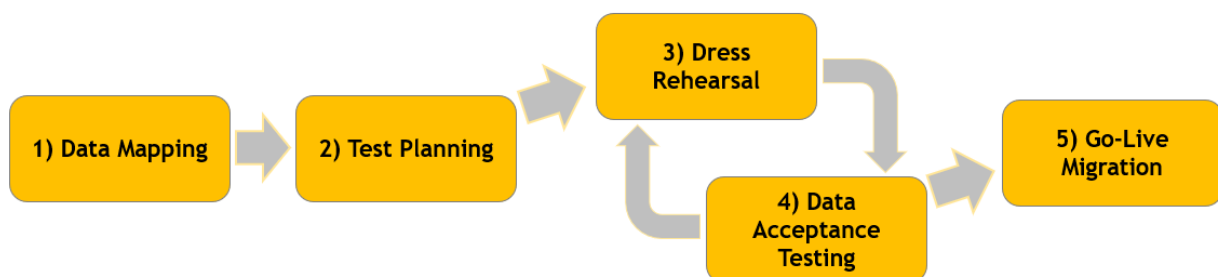
Used for the UAT (user acceptance testing) stage of the project. It will contain up to date customisations from sandbox that have been tested & confirmed or finalised. The UAT environment will contain CHP's data from the most recent migration round for user acceptance testing.

DM environment

Used to refine the migration process and as the pre-production environment. The DM environment is used once the delta migration or late-stage full migrations commence. This environment will contain the latest customisations that have been approved before the round of migration begins. Customisations that are confirmed during the migration run will not be included until the next update.

Migration Process

The Data Migration Process shall follow the following stages.



Delta Migration Method

During the go-live migration the client's legacy system will be closed off prior to the final data extract, new information can't be entered into Zavanti until the migration is complete. Depending on the volume of data that is migrating the time required to completely migrate and review a full set of data for go-live may extend to a length that is unfeasible to have no staff able to work in any system. To handle this possibility data can be migrated via a delta method, i.e. once the initial mapping is confirmed and post migration functionality tested, the later migration runs will only include data that has been created or records that have been edited in any way. This requires an additional column tracking the date the data was last modified on, often this is taken from the audit functionality in the CHPs previous tenancy management system. A full export of the data will be done by the CHP for each of these 'delta migrations' even though only some of the data will be migrated, depending on the 'modified on' column in the exported data.

Any new customisations added that need data migrated to them will mean a full migration of that template/entities data is required to update it for all records. Because of this it is important that customisations be finalised before the later delta runs begin. These delta migrations will be run more and more regularly as the go live migration approached to reduce the volume of data in each run, therefore it is crucial that the export of data from the legacy system is as fast as possible.

SharePoint Migration

Each record within selected entities in Zavanti has a unique location (URL) for file storage within SharePoint. Each of these locations can have a set of folders and sub folders within it to add additional details. CHP's existing local drive files and records can be migrated to these SharePoint locations if detailed mapping can be provided in a single bulk file. The most common migration is for property and tenancy records, but other entities can be done. The mapping provided by the CHP must link each file along with its full local drive address to a specific folder of a specific record in Zavanti.

Example LOCAL DRIVE SOURCE:

[C:\Users\XXXX\OneDrive\Documents\Work\CHP\LeaseAgreements\ImportantLease1.docx]

MAPS TO ZAV: [Entity: Properties, Property ID: 12345, Location: Documents\Leases]

Test Planning

A test plan details the objectives, users, and processes around exporting data. The plan will detail the end-to-end process and will validate each stage documenting how data will be exported efficiently and accurately and who is responsible. The test plan will also document the strategy to validate the data and functionality post migration. This will need to be produced by CHP.

The purpose of a test plan is to ensure that the planned data extraction for data migration will proceed as expected.

Action	Details
Timeframe:	The test plan will be required one week prior to the first dress rehearsal - TBA.
Testing	Will occur after each extraction beginning after Dress Rehearsal #1
CHP Role	<ul style="list-style-type: none"> Spot check extracted data to validate extract from CHP data source is full and complete. Endorse test plan.
Zavanti Role	<ul style="list-style-type: none"> Design and build data import utility. Provide feedback of draft test plan to CHP. Contribute test plan scenarios
Resources	<ul style="list-style-type: none"> CHP Subject Matter Expert(s) as required Zavanti Subject Matter Expert(s) as required
Expected Outcome	Extracted, metadata and additional data mirrors CHP source data.

Dress Rehearsals

It is anticipated that four dress rehearsals will be required prior to the go-live implementation of the transaction. The purpose of a dress rehearsal is to undertake specified tasks and actions to simulate and test what would occur during the go-live implementation of the transaction.

Action	Details
Timeframe:	<ul style="list-style-type: none"> Dress Rehearsal 1 - TBA
Testing	<p>Testing will occur after each extraction beginning after Dress Rehearsal #1.</p> <p>The testing of dress rehearsal round one will identify any missed data issues that were not detected as part of CHP's data cleansing activities. Testing to ensure the migration code is working as needed for the specific customisations.</p>
CHP Role	<ul style="list-style-type: none"> Complete final activities prior to extraction Extract data Data mapping enhancements if required. Reconciliation Validate data Execute additional reports if applicable Data cleansing of any identified data issues
Zavanti Role	<ul style="list-style-type: none"> Transform data from CSV files. Load data into Zavanti Reconciliation Validate data in Zavanti Execute additional reports if applicable.
Resources	<ul style="list-style-type: none"> CHP Subject Matter Expert(s) as required Zavanti Subject Matter Expert(s) as required
Expected Outcome	<p>The purpose of Dress Rehearsal round 1 is to develop the export process and import scripting and to ensure the migration code is working as needed for the specific customisations. All implementation activities occur as expected including data transfers successfully from CHP's core systems to Zavanti Housing Solution's system and lands in the right fields and format as mapped. Round 1 will identify any additional data cleansing required by CHP in preparation of second round of data migration.</p>

Action	Details
Timeframe:	<ul style="list-style-type: none"> Dress Rehearsal 2 - TBA
Testing	<p>Functional and data testing on second round of migrated data following the data improvement from dress rehearsal 1. Testing of migrated data to identify if any post UAT fixes impact migration. Any issues with data cleanliness are identified and fixed in preparation for dress rehearsal 3</p>
CHP Role	<ul style="list-style-type: none"> Complete final activities prior to extraction Extract data

Action	Details
	<ul style="list-style-type: none"> • Data mapping enhancements if required. • Reconciliation • Validate data. • Execute additional reports if applicable. • Data cleansing of any identified data issues
Zavanti Role	<ul style="list-style-type: none"> • Transform data from CSV files. • Load data into Zavanti • Reconciliation • Validate data in Zavanti. • Execute additional reports if applicable.
Resources	<ul style="list-style-type: none"> • CHP Subject Matter Expert(s) as required. • Zavanti Subject Matter Expert(s) as required
Expected Outcome	All implementation activities occur as expected including data transfers successfully from CHP's core systems to Zavanti Housing Solution's system and lands in the right fields and format as mapped. Fine tune data export and import scripting process and carry out functional and data testing and validation.

Action	Details
Timeframe:	<ul style="list-style-type: none"> • Dress Rehearsal 3 - TBA
Testing	Dress rehearsal 3 should demonstrate a refined import process with clean and accurate CHP data for final testing and validation.
CHP Role	<ul style="list-style-type: none"> • Complete final activities prior to extraction • Extract data • Data mapping enhancements if required. • Reconciliation • Validate data. • Execute additional reports if applicable
Zavanti Role	<ul style="list-style-type: none"> • Transform data from CSV files. • Load data into Zavanti • Reconciliation • Validate data in Zavanti. • Execute additional reports if applicable.
Resources	<ul style="list-style-type: none"> • CHP Subject Matter Expert(s) as required. • Zavanti Subject Matter Expert(s) as required

Action	Details
Expected Outcome	All implementation activities occur as expected including data transfers successfully from CHP's core systems to Zavanti Housing Solution's system and lands in the right fields and format as mapped.

Action	Details
Timeframe:	<ul style="list-style-type: none"> Dress Rehearsal 4 (if needed) - TBA
Testing	Will occur after each extraction beginning after Dress Rehearsal #1. Dress rehearsal 4 will only be required if ongoing data issues were identified that impact the functional and data testing in previous dress rehearsal rounds. Dress rehearsal 4 is generally a delta method.
CHP Role	<ul style="list-style-type: none"> Complete final activities prior to extraction Extract data Data mapping enhancements if required. Reconciliation Validate data. Execute additional reports if applicable
Zavanti Role	<ul style="list-style-type: none"> Transform data from CSV files. Load data into Zavanti Reconciliation Validate data in Zavanti. Execute additional reports if applicable.
Resources	<ul style="list-style-type: none"> CHP Subject Matter Expert(s) as required. Zavanti Subject Matter Expert(s) as required
Expected Outcome	All implementation activities occur as expected including data transfers successfully from CHP's core systems to Zavanti Housing Solution's system and lands in the right fields and format as mapped.

Data Acceptance Testing

Data acceptance testing happens following dress rehearsal activity. The purpose of data acceptance testing is to determine whether the data that was migrated from CHP's core systems to Zavanti Housing Solution, migrated as anticipated, to the relevant fields in the correct format.

The purpose of the data acceptance testing is to identify and address any errors or defects prior to the next dress rehearsal or complete final remediation prior to the go-live implementation of the transaction. As part of Data acceptance testing is the requirement to carry out functional testing on the migrated data to ensure the system works as expected. For example, testing that rent generates correctly, import payments, run a rent calculation etc.

Key activity in this phase is acceptance checking and ensuring that the same information is in both systems.

Action	Details
Data Acceptance Testing	<ul style="list-style-type: none"> Dress Rehearsal 1 Acceptance testing- The testing of dress rehearsal round one will identify any missed data issued that were not detected as part of CHP data cleansing to be addressed for the second round of data migration. TBA Dress Rehearsal 2 Acceptance testing - Functional and data testing on second round of migrated data following the data improvement from dress rehearsal 1. Testing of migrated data to identify if any post UAT fixes impact migration. Any issues with data cleanliness are identified and fixed in preparation for dress rehearsal 3. TBA Dress Rehearsal 3 Acceptance testing - Dress rehearsal 3 should demonstrate a refined import process with clean and accurate CHP data for final testing and validation. TBA Dress Rehearsal 4 (if needed) Acceptance testing - Dress rehearsal 4 will only be required if ongoing data issues were identified that impact the functional and data testing in previous dress rehearsal rounds TBA
Testing	Will occur after each extraction beginning after Dress Rehearsal #1
CHP Role	<ul style="list-style-type: none"> Compare CHP system data to Zavanti Housing Solutions data. Record defects Remedy system owned defects. Analyse anomalies Functional system testing
Zavanti Role	<ul style="list-style-type: none"> Compare CHP system data to Zavanti Housing Solutions data. Determine number of tests to undertake per 'tenancy / property'. Record defects Remedy system owned defects. Analyse and remedy anomalies
Resources	<ul style="list-style-type: none"> CHP Subject Matter Expert(s) as required Zavanti DM Consultant and Subject Matter Expert(s) as required
Expected Outcome	The data fields that CHP provided will be mapped to the appropriate location in Zavanti. Zavanti fields will be populated with the correct data in the correct format.

Go-Live Migration

Description: Data migration is the transfer of data from CHP's core system to the Zavanti Housing Solution.

The process to migrate the final data will involve CHP systems data be exported from the core system, transformed, and accurately recorded within migration templates which will be imported to Zavanti Housing Solution's acknowledging formats and requirements. The previous system will become inactive, and no further data will be recorded in the previous system to ensure full and accurate data for the final go live migration to Zavanti. The exact timing and internal processes will need to be documented by CHP as part of the Go live plan.

Following the data migration, a reconciliation activity will be required to ensure the appropriate data set was migrated.

Action	Details
Timeframe	Several days before planned go-live - TBA
CHP Role	<ul style="list-style-type: none"> Extract data Reconcile data extract
Zavanti Role	<ul style="list-style-type: none"> Transform data. Load data
Resources	<ul style="list-style-type: none"> CHP Functional Support Analysts CHP Subject Matter Expert(s) as required Zavanti Team as required
Expected Outcome	Data transfers successfully from CHP's core systems to Zavanti Housing Solution and lands in the right fields and format as recorded within the template.

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