



bipsync

MIGRATING YOUR RESEARCH INTO BIPSYNC

Accurate research is the foundation of your fund's value. The Bipsync RMS helps you realize that value, starting with a migration process to create a single, consistent research environment for all your data.



Our team of data experts follow a clear and proven process to ensure a smooth transition to your new system. The Bipsync migration process is designed to:

- Fully understand your requirements and research data.
- Clearly communicate, coordinate and organize responsibilities.
- Protect the accuracy and range of your research.
- Improve research quality.
- Maximize the value of your research in the Bipsync RMS and expedite user adoption.

Migration services are included in your license fee* and tailored to your needs. Even for the most complex of data sources, our migration methodology is proven to not only preserve the quality and consistency of your existing research, but also improve it.

QUALITY ASSURANCE FACTORS

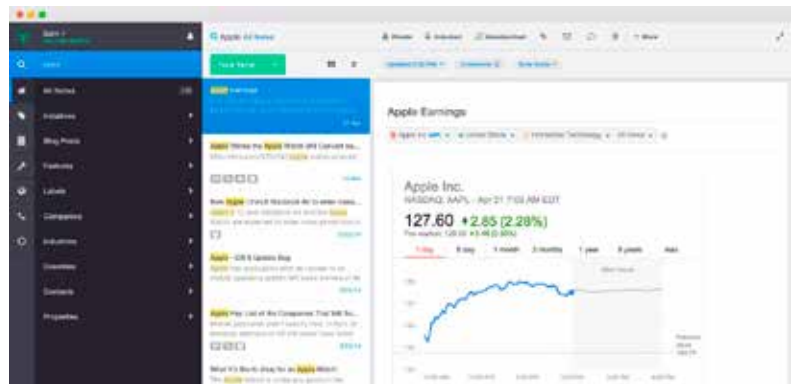
Regardless of the scale or complexity of your migration, our team adheres to the strictest quality assurance practices to ensure:

- Accuracy
- Consistency
- Completeness
- Compliance
- Usability

MIGRATION COMPLEXITY FACTORS

Timescales for your migration process are agreed following the discovery stage and will depend on a number of complexity factors:

- Data volume
- Data format diversity
- Data consistency and validity
- Data structural complexity
- Data age



MIGRATION STAGES

Requirements Gathering / Discovery

- Define the scope and goals of the migration.
- Identify all sources and systems of data.
- Initial estimates for type, quantity and structure of research.
- Gather schemas, screenshots and explanations of existing data.
- Coordinate dates and methods for transferring data, in phases where appropriate.

Initial Assessment / Review

- Initial import data transferred.
- Profile data for inconsistencies, anomalies, duplicates and cleansing.
- Initial mappings produced.

Migration Design

- Review mappings and update.
- Update timescales/phasing based on findings.
- Agree on data subset to test.

Review Subset

- Update mappings and migration.
- Review additional subsets if necessary.

Full Import

- Final import data transferred.
- Re-profile to check for problems.
- Execute full migration.

Quality Assurance

- Internal Quality Assurance test in Bipsync.
- Fund Quality Assurance tests in Bipsync.

Transition

- Ongoing data maintenance / edge-case fixes where necessary.
- Old system retirement or parallel operation period.

Whether you require access to a decade's worth of data from an existing RMS, disparate notes from a collection of consumer tools or information from your own proprietary systems, you can be confident our migration process will deliver the robust, comprehensive and efficient project your fund needs.