ChainSys

Smart Data Platform™

Data Assessment Questionaire

WHO WE ARE

About ChainSys

A Data Management innovator since 1998, best known for its Smart Data Platform for data management, ChainSys is a leader in the data migration, integration, data maintenance, MDM, data quality, data cataloging, machine learning, AI, analytics, visualizations, audits, compliance and RPA based autonomous testing & low-code web/mobile application building areas.

ChainSys has successfully deployed its Smart Data Platform in several Fortune 500 companies worldwide, and continues to grow and innovate rapidly. Headquartered in Lansing, MI, and spread across 5 continents, ChainSys prides itself on its Product, Process & People which constantly push the envelope on innovation & creativity.

Why take our Assessment Questionnaire?

If you are interested in leveraging the smart data platform, the data assessment questionnaire is a great place to start.

Even if you're not, use our assessment questionnaire to gauge your organization's current state of data proficiency. It can help you and your peers ask the right questions about current & future data programs. Discuss with our experts on ways we can help you get to your best.

Compiled by

Krishnan Ganesan

Product Owner & Head of Sales

Krishnan is a passionate leader and has creatively solutioned multiple 'Smart Data' projects for Organizations around the globe. Nearing a decade in ChainSys, Krishnan is the head of sales for the west coast, a certified PMP & SAFe practitioner, and a respected subject matter expert in the ERP space.

About the Smart Data Platform

Managing data doesn't have to be hard. ChainSys' Smart Data Platform streamlines data migration, setup migration, integration, data quality, archival, master data management, RObotic process automation & application building - with a low-code approach.

The Smart Data Platform's differentiator lies in its 2000+ preconfigured adapters. The adapters provide an 80% baseline for all data management activities, and help save more than 50% in time & cost.

Products in the Smart Data Platform

dataZap™

dataZap is used for data,setup & master data migrations, mass data loads, reconciliations, integrations, big data ingestion & test data preparation.

dataZen™

dataZen aids in master data management, governance and on-going data quality needs.

dataZense™

dataZense is used for data visualization, reporting, analytics & cataloguing.

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Data Migration

Q What ETL tools are available that can be used?

Q Is the data to be migrated all master data or is transactional data being migrated? If it is transactional, what is the time horizon?

Q What data migration tools are being used?

Q What is the expected data volume (by data object) of the systems expected to be migrated?

Q Please confirm if historical data and data archival is in scope.

Q Are there manual data sources where data is maintained within Excel? If so, what proportion of data will be sourced manually?

Q Preparing, using Data Analysis and MDM best practices along with other Data Migration tools and accelerators are the best way in achieving a successful data migration. Does the organisation plan to leverage the solutions used in the migration as a step to continuing Master Data Management? Do you have a post migration

Q Can you describe the challenges and pain points today with regards to the management of the data, that is in scope for this migration, today?

Q Are you looking at bringing Legacy Transaction Data.

Q What data objects are assumed in scope? Can you please provide a list of Master Data and Transactional Data being considered

Q Can you provide the output from your ERP Assessment that outlines the gap/fit findings of your data?

Q What Extract/Translate/Load (ETL) tools do you have in place?

Q Do you have any security/privacy restrictions for extracted data exported to a supplier site?

Q Is there a need to mask the data while extracting ?

Q Do you have a process in place to identify valid active records?

Q Are there any challenges currently for accessing historical data ? If so, what are those?

Q How many years of Historical data will be profiled/cleansed and migrated to the new ERP platform

Q For the data repository, do you have a preferred data warehousing environment (Oracle, DB2, etc.)?

Q Is the intended Data Migration or Conversion Strategy in place? Please provide the document describing the Data Migration/Conversion Strategy .

Q Do any of the source objects require address cleansing? (please list by object, in this case Customer, Vendor and which countries and states)

Q Who will conduct the data extraction from the source system(s)? (please list by object). Will these resources be full-time, part-time, other? (please indicate by resource)

Data Integration

Q Will the interfaces be real-time data or batch data?

Q Will legacy systems need to integrate with the new system on a long term basis?

Q How many systems will need to be integrated?

Q Will the data be leveraged by multiple systems or only single system? pls mention specifics

Q Do you have integration needs with other applications in the master data change process (ex. Teamcenter, Maintenance connection,Mapics,C.Core or any other)? What are they? Indicate 1-way or 2-way.

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Data Governance & Master Data Management

Q What type of master data is required to be consolidated? Customer, Material, Vendor, Account, etc. ? Is there any existing tool used for MDM solutions?

Q What is the level of maturity for enterprise MDM? Are there established MDM governance bodies, processes, and standards in use within any of the business units? If non-existent, do you expect to establish data governance/MDM capability as part of the consolidation?

Q How do you handle Master Data Governance / Master Data Management / Data Integration today?

Q Do you have Data Governance and Master Data Management today and do you have a dedicated team responsible for data?

Q How large is your data management and custodian team(s), what sort of makeup is the team, how is the team structured, including description of roles and how is this team managed?

Q Is the ERP system going to be the system of truth for some of the most important Master Data (Vendors and Customers), or will other current and future systems be involved?

Q How is data handled today between sites? For example, is there one material/vendor/ customer accessible and these same records are used at each site? Do you have site specific master data (MM/Vendor/Customer)? If a piece of master data is shared throughout the organisation how is it currently being maintained? Are requests made to the data management team to update or do people at the sites have the ability to update Master data today?

Q Is there a current master data management or governance process in place?

Q Is it the intent to harmonize data from all the legacy environments to one instance? If so, have any data clean-up activities already begun? Will you require assistance from the SI to organize this effort?

Q Is it the intent to harmonize data from all the legacy environments to one instance? If so, have any data clean-up activities already begun? Will you require assistance from the SI to organize this effort?

Q Does the organization have a formal Data Governance Program? If so, please advise if Central (across enterprise), by Line of Business (LOB), by data domain, etc.

Q Does the organization have a formal Data Governance Organization with named individuals and defined Data Management roles and responsibilities (i.e. Champions, Stewards, Custodians)?

Q Does a documented "End-State" Data Governance vision exist? If so could we evaluate a copy?

Q Does an Enterprise Architecture roadmap and/or Data Governance roadmap exist? If yes, may we evaluate a copy?

Q Has the data been cleansed previously? What was the success of that project? How was it done? Can the details of the process used previously be shared? For example previous profiling results before vs. after, and the business rules and cleansing rules applied? Was it done manually or automated? If automated what tools?

Q Please provide the field details to be enriched for Vendor, Material, Customer, PUR Info Record, Users, BOMs,Routings master data? What are plausible sources of data to use for enrichment?

Q Are there any third party reference databases (DNB, EQUIFAX, or others) used to enrich the source data such as vendor, customer or other? If Yes, should the same be considered in the Target System as well? If No, is this a requirement to be considered in scope??

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Data Quality Management

Q Will the interfaces be real-time data or batch data?

Q Are there any known data quality challenges like duplicates, incorrect addresses across source systems that SI need to consider for scope.

Q For cleansing the data , are there any address cleansing packages available?

Q Are you already doing data quality analysis today?

Q Have you started creating Data Quality Rules? Rules that can be used to score data in terms of integrity and completeness?

Q What tools and repositories are you using to help in analysing data.

Q What tools do you have in place to perform the data profiling?

Q Can data be exported to a supplier site for data profiling?

Q Can data be exported to an off-shore supplier site for data profiling?

Q Do you have policies and procedures in place to maintain a certain degree of data quality?

Q Does the organization have data quality improvement processes and data domain experts identified to address data quality issues? May the process documentation be shared?

Q Are Data Standards and business rules documented and maintained in an IT system (specify)? Please share the documents?

Q Does the organization have defined rules in place to enforce data standards during data entry in the various systems? May the rules be shared?

Q For each business object in scope, does the organization have DQ metrics defined and monitored for DQ improvement opportunities?

Q Has any initial data profiling been performed on the source data? (if so please list scores by object, provide reports)

Q "What is the quality of the source data? Correct? Clean? Conforming? Classified? Consolidated? Complete? Consistent? Current? Cross Table Integrated?"

People & Process

Q Have internal resources been identified ? Are they familiar with the data structures? Do they understand the data needs?

Q What is the expected percentage time allocated to the project?

Q Are the business processes consistent across the enterprise or within Lines of Business (LOB)?

Q Are there processes for creating/modifying/deleting Business processes in the organization?

Q Do you have cases where business processes impact more than one area and ownership of data is an issue?

Q Are the data management processes consistent across the enterprise or within Lines of Business (LOB)?

Q Are the data management processes documented and maintained on an on-going basis?

Q Is there need to provide Knowledge Transfer / Training to resources on usage of Data Quality tools? If yes, what are approximate number of training participants / end users (IT support team)

Q If training needs to be provided , please confirm if Supplier needs to provide train-the-trainer sessions or end user training through formal classroom based training?

Q If classroom training needs to be provided, please let us know the training location/s.

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Current Enterprise Application Footprint & Environment Information

Q Please provide volume details of data objects currently available, i.e., Material, BOM, Routing, Customers, Vendors?

Q Please let us know if there are any regulatory compliance / local requirements that restricts the support for a particular in-scope application from offshore? location?

Q Do you have an inventory of data management processes that will be included in scope?

Q Please specify the project location/s for the data assessment project?

Q What is the language mix of the data? (please provide language by object and number of records not in English)

Q As part of the data assessment project, does the Supplier need to conduct functional workshops to stakeholders from different global plants? If yes, please list out the locations?

Q Have you already purchased Licenses of, or have other ETL or data quality, MDM or integration tools? (if yes, which make and version/s)

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Endpoints supported by the Smart Data Platform

Oracle Sales Cloud, Oracle Marketing Cloud, Oracle Engagement Cloud, Oracle CRM On Demand, SAP C/4HANA, SAP S/4HANA, SAP BW, SAP Concur, SAP SuccessFactors, Salesforce, Microsoft Dynamics 365, Workday, Infor Cloud, Procore, Planview Enterprise One	**Cloud Applications**
Oracle E-Business Suite, Oracle ERP Cloud, Oracle JD Edwards, Oracle PeopleSoft, SAP S/4HANA, SAP ECC, IBM Maximo, Workday, Microsoft Dynamics, Microsoft Dynamics GP, Microsoft Dynamics Nav, Microsoft Dynamics Ax, Smart ERP, Infor, BaaN, Mapics, BPICS	**Enterprise Applications**
Windchill PTC, Orale Agile PLM, Oracle PLM Cloud, Teamcenter, SAP PLM, SAP Hybris, SAP C/4HANA, Enovia, Proficy, Honeywell OptiVision, Salesforce Sales, Salesforce Marketing, Salesforce CPQ, Salesforce Service, Oracle Engagement Cloud, Oracle Sales Cloud, Oracle CPQ Cloud, Oracle Service Cloud, Oracle Marketing Cloud, Microsoft Dynamics CRM	**PLM, MES & CRM**
Oracle HCM Cloud, SAP SuccessFactors, Workday, ICON, SAP APO and IBP, Oracle Taleo, Oracle Demantra, Oracle ASCP, Steelwedge	**HCM & Supply Chain Planning**
Oracle Primavera, Oracle Unifier, SAP PM, Procore, Ecosys, Oracle EAM Cloud, Oracle Maintenance Cloud, JD Edwards EAM, IBM Maximo	**Project Management & EAM**
OneDrive, Box, SharePoint, File Transfer Protocol (FTP), Oracle Webcenter, Amazon S3	**Enterprise Storage Systems**
HIVE, Apache Impala, Apache Hbase, Snowflake, mongoDB, Elasticsearch, SAP HANA, Hadoop, Teradata, Oracle Database, Redshift, BigQuery	**Big Data**
mangoDB, Solr, CouchDB, Elasticsearch	**No SQL Databases**
PostgreSQL, Oracle Database, SAP HANA, SYBASE, DB2, SQL Server, MySQL, memsql	**Databases**
IBM MQ, Active MQ	**Message Broker**
Java, .Net, Oracle PaaS, Force.com, IBM, ChainSys Platform	**Development Platform**

For Case studies, references, or a no obligation trial or proof of concept, visit us at chainsys.com/manage-data

For More Information, Visit:
http://www.chainsys.com/manage-data

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