

Upgrade to Jobstream 9

We make it easy to migrate to Jobstream 9. Through 17 years of experience we have developed a low-risk, proven methodology for migrating your data and staff to the Jobstream platform from a variety of other systems including 4Series, Phoenix, Troika and Sage.

Whichever system you currently use, our proven migration method is backed by our team of expert consultants and project managers who will guide you through the process to ensure switching is both seamless and cost-effective.

What is Jobstream 9?

Jobstream 9 is a highly configurable software platform that enables trust companies, family offices, and similar organisations to efficiently manage their business. It provides a single integrated source of role-based, actionable information supporting client and office:

- Administration
- Accounting
- Practice Management
- Reporting
- Regulatory compliance

Built on Microsoft technologies, the Jobstream platform currently operates at the heart of over 60 organisations globally.



Our proven migration methodology

1 Business process analysis

Pre-migration analysis of existing data and systems carried out in consultation with appropriate client staff. Project documentation is created to define migration scope and data mappings, and provide recommendations for data clean-up in source systems.

2 Data mapping and iterative development

Development of data migration scripts followed by iterative implementation cycles. Testing is carried out on a trial database with issues are logged and fed directly back to our development team.

3 System configuration

Construction of live database(s) enabling creation of resources such as report templates and data tables. The live database(s) form the base system for script implementation and ultimately live data migration.

4 Key user familiarisation

Key users are briefed and trained to enable efficient testing and subsequent implementation.

5 Acceptance testing

Spot checking of selected typical entities and reconciliation of data such as summary figures and transaction numbers from source systems to live systems.

6 Parallel running (optional)

The legacy system(s) and new Jobstream platform are operated in parallel for a defined period. This serves to further ensure data and operational processes are implemented effectively.

7 Full user training

Prior to migration completion our experienced training staff ensure that, from day one, your organisation will get maximum benefit your new Jobstream platform.

8 Completion & go live

Upon formal acceptance of the data migration, final, live migration is implemented in accordance with project plans.

JOBSTREAM GROUP

Contact us to find out more

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