

Case Study | DB Maintenance & Support



DB Support and Maintenance for Investment Advisory

About Client

The client is an investment advisory subsidiary which handles fee based accounts and is an SEC registered investment advisory firm. They offers education, advice and implementation of retirement planning and other wealth management strategies through Registered Investment Advisors nationwide.

Technology Used

- Microsoft SQL Server 2014
- Business Intelligence Development Studio

Business Benefits

- Easy management and fast troubleshooting
- Secured database access
- 24X7 support and services

Business Challenges

- Unstructured input data file from vendor
- Missing mandatory fields for processing
- Huge number of columns that are not required for target system

Solution Provided

- Understand the database elements and source data format/structure
- Import the data and merge all the relationship tables into development database
- Update/Modify the element/column name according to target system
- Clean all the ambiguity data
- Perform the conversion part for data type format, min/max length, required field information according to target system
- Perform quality test and make sure that the data is in required format
- Finally load the completed data into Production environment

