

## Frequently Asked Questions:

# The Conversion Process

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## **SCHEDULING**

### **What is the general timeframe for a conversion?**

Generally around two months, although some conversions take less time. As a rule, we allocate two weeks to complete the remote installation, two weeks for the Analysis phase (where you check the data mapping), and four weeks for the trial phase (where you thoroughly check how your data was converted). Once the Trial Conversion is accepted, the Final Conversion is run and you 'go live'.

### **Why so long?**

It is important that you allocate enough time to review both the Analysis and Trial Conversion because any undetected errors will have implications on how your data is converted. Furthermore, the period leading up to the Final Conversion provides you with a valuable opportunity to 'play and learn' in the system.

### **Can it be fast-tracked?**

Yes, although generally it is not recommended. Nonetheless, the process can move as quickly as you want it to, provided the necessary resources are allocated to adequately check each milestone. Conversions can be completed in as little as a month, where we allocate one week to complete the remote installation, one week for the Analysis phase, and two weeks for the Trial phase. 'Go live' follows the running of the Final Conversion program.

### **What happens if I miss a milestone?**

The earliest and best possible dates have been allocated to your conversion. If for some reason you do not meet your obligations and a milestone is missed, your conversion timeline can be significantly affected. The Conversion booking schedule is often near capacity and a replacement slot may not be readily available. This can have implications on your agreed 'go live' date.

### **Can I reschedule?**

Yes, but we request as much notice as possible. If we are given plenty of warning, we should be able to re-schedule your milestone without too much hassle. We cannot, however, guarantee the replacement slot will always meet with your expectations.

### **When should I schedule training?**

If purchased, we recommend training occurs after you have received your converted data from the Trial Conversion. That way, you can receive your training while using 'real' data, which will help you as you move through the process of reviewing the accuracy of that data conversion.

## **DATA UPLOADING**

### **Is my data secure?**

Yes. Each organisation has their own FTP site created specifically for them. It can only be accessed by entering a unique username and password.

### **Can I upload early?**

Yes. The earlier we have your data, the better. This gives us extra time to check that everything is in order, and also allows us to move forward your initial milestone if a gap opens up in the schedule. (NOTE: This only applies to your initial data upload. The date for the second data upload is not flexible.)

### **Why do I have to upload my data a second time?**

Some conversions require data to be uploaded a second time. The second data set is required so that we collect all the activity that has occurred in your library since your initial upload. Our goal is to convert your most up-to-date data.

### **How will I know if I need to upload again?**

Where Softlink runs the Final Conversion program (as opposed to your organisation running the Final Conversion on site), a final upload is required. If you are unsure, refer to the 'Library Management Conversion Process' document or your 'Data Conversion Process Timeline'. We will send a reminder in advance of your obligations in any case.

### **If I don't need to upload a second time, how does my data get updated?**

The conversion program that you run on site is designed to extract a fresh set of data out of your current library software. That way, the most up-to-date data is converted and no history is lost.

### **How do take a screen capture (also known as a screen shot or screen dump)?**

It's very simple. Go to the screen you want to 'capture' and press ALT+PRINTSCREEN. Then open Word and press CTRL+V to 'dump' the image into the document. (The PRINTSCREEN key is usually on the top right hand side of your keyboard.) Softlink requests that all screen captures be entered into a single Word document.

### **How do I scan a barcode into Word?**

Simply open Word and use your barcode scanner to capture the required barcode. It will scan directly into Word. For resources, remember to type the title of the resource next to the scanned barcode, and for borrowers, enter the borrower name.

## **USING YOUR CURRENT LIBRARY SYSTEM**

### **Can I keep using my current library system during the conversion process?**

Absolutely - the conversion process is designed to have as little impact on your day-to-day library operations as possible. You can continue cataloguing, adding borrowers, lending, and everything else you would normally do.

### **When do I have to stop using it?**

The time to stop using your current library management system is immediately before the Final Conversion milestone. Once you provide us with your final set of data, you then cannot use your current system again. Any changes made from that point on will not be converted and that data will be lost. If you run the final conversion yourself (i.e. you do not upload a second time), you nominate the 'stop date', which is when you will run the Final Conversion. Your 'Data Conversion Process Timeline' document references a '*stop using current LMS date*' and this indicates when you should stop using your current system.

## **MAKING CHANGES TO THE CONVERSION PROGRAM AND TO OLIVER**

### **How late can I make changes to the conversion program?**

You will be provided with a deadline by which time you will need to have provided your feedback on the Trial Conversion. If the feedback is late, your Final Conversion will be delayed. When feedback is received well beyond the due date, there is the potential that extra costs will be incurred should you want your responses to be considered. Note that all changes to the Trial Conversion must be made before the Final Conversion is run.

### **Can I make changes to the conversion after I have gone live?**

Not always. Sometimes it is not possible to fix errors or make any changes once the Final Conversion has been run. That is why it is so important to thoroughly check how your data is converted following the Trial Conversion. In those instances where it is possible to make changes, there is a cost involved. The Final Conversion signifies the end of your implementation project and any new work requires a new project be commenced. Softlink will prepare a proposal for your consideration in such cases.

### **Can I make changes after the Final Conversion has been completed but before the 'go live' has been initiated?**

Once again, not always. If it is possible, this work will fall outside the scope of the now completed implementation project and a new project will need to be commenced. Softlink will formulate a proposal for your consideration.

### **Can I load data into Oliver or make changes to the Oliver system before the final conversion has been completed?**

For the most part, no. The Final Conversion will wipe out any data that has been entered into the system, and therefore, any changes you have made will be lost.

## **GENERAL**

### **Who do I ask for help?**

- If it's a scheduling issue, speak to the Project Management team.
- If you have a problem with how your data has been converted, contact your assigned Data Conversion Analyst. This is best done by simply replying to the email you have received from [conversions@softlinkint.com](mailto:conversions@softlinkint.com). If sending a new email, be sure to include "case xxxx" in the subject field to ensure the correct Analyst receives your message.
- If it's a general question or your software is not working, ask the Helpdesk ([support@softlinkint.com](mailto:support@softlinkint.com)).

### **Who do I contact if I want training?**

Russell McGrath is Softlink's Training Manager and he can provide a training proposal for your consideration. Russell's email address is [rmcgrath@softlinkint.com](mailto:rmcgrath@softlinkint.com).