

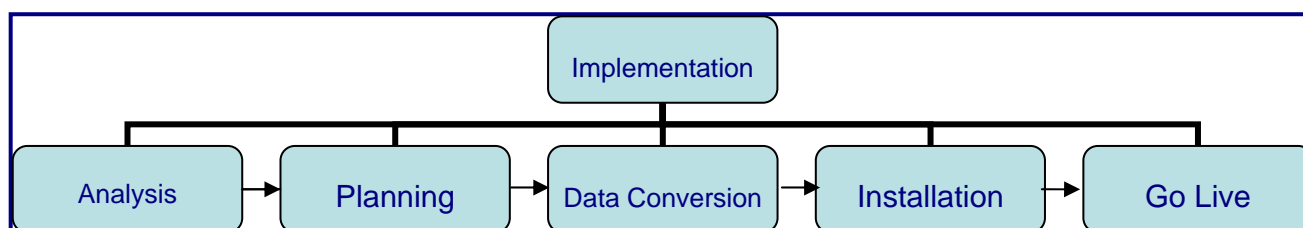
## Softlink Data Conversion and Implementation Process

### Overview

Softlink's data conversion and implementation process is project managed to ensure a smooth transition from your existing system to a Softlink product. As Softlink has been providing solutions to school libraries for over 20 years we have converted from over 30 different library systems. During this process there is minimal disruption to your library operations. There is also time allocated to review the data to ensure the data is converted to a high standard.

### Best practice

Softlink's implementation methodology is based on PRINCE2, the international standard in project management. This ensures that the project is implemented using best practice standards and processes.



### Analysis

We will work through an initial analysis with you to:

- ✚ Review the conversion process and confirm your requirements and obligations
- ✚ Discuss the training options
- ✚ Discuss timeframes to ensure an achievable project plan is built and agreed
- ✚ Discuss the involvement needed from both parties

### Early Preparation and Planning

There are several stages in the implementation of a new system. We will work with you to ensure a successful and smooth transition.

- ✚ Some things can be done well ahead of time, e.g. installation of new hardware.
- ✚ This is a great time to examine existing policies and practices. Some things may have to change, some may no longer make sense, e.g. circulation policies may be implemented differently in Oliver.
- ✚ Resolve as many outstanding problems and transactions in your existing system as possible before extracting your data for conversion. The fewer the number of exceptions, the better.
- ✚ Purge unwanted records, e.g. unwanted borrower records, disposed resources.
- ✚ Seek advice on the data extraction options and test these.

Implementation of a new system provides an opportunity to review your current practices, introduce changes and stream-line processes. Plan for the way you want your system to work, which may be different to the way you worked in the past.

### Data conversion

Upon receipt of your order we will contact you to begin the conversion and implementation process. Our instructions will assist in this process and your conversion will be scheduled within agreed timeframes.

Once this process commences one of our technical specialists will contact you and guide you through the data conversion process. There are 6 steps in this process:

1. confirm data conversion requirements
2. obtain a copy of your data
3. analyse and verify the data to ensure your existing data is mapped correctly to Oliver
4. develop and test a conversion program
5. confirm installation details with you



6. provide you with access to your data to test in your new system

During this process we will require information about

- ✚ borrower data
- ✚ catalogue data
- ✚ current loans
- ✚ loan history
- ✚ serials – subscriptions and schedules (if applicable)
- ✚ current orders (if applicable)
- ✚ order history (if applicable)
- ✚ lending rules

In our experience of hundreds of data conversions, the single greatest issue facing library staff is the diversity and inconsistencies in the catalogue which result from various cataloguing “standards” and practices used over the years. Examine your data records critically to gain an understanding of potential data issues and to ensure we all have a clear and shared agreement on the requirements.

## Installation

Preparation for installation requires a number of things from you and your IT staff. These must be completed before moving to the installation of the software:

- ✚ server and workstations purchased and installed, or existing machines approved
- ✚ installation dates confirmed with your IT staff
- ✚ IT staff prepared for installation
- ✚ web server software installed (i.e. IIS etc)
- ✚ Internet Explorer installed on workstations
- ✚ domain and host SMTP settings documented
- ✚ administrative access to server (direct or remote)
- ✚ remote access to server prepared and allowed
- ✚ CD access to server
- ✚ Oliver server location identified
- ✚ workstations have access to the server via url
- ✚ access to email from workstations
- ✚ generic librarian email address set up (for sending overdue notices etc)



## Training

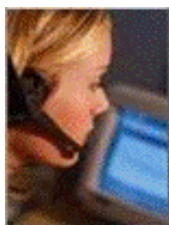
Softlink offers several options for training:

- ✚ Interactive training sessions on CD
- ✚ On-line, Web-based training from a distance
- ✚ On-site training session delivered by one of our training professionals.

## Support

After implementation you will receive a handover to our experienced support team.

You will enjoy the following services:



- ✚ assignment of a dedicated client support consultant
- ✚ toll-free phone support for your convenience
- ✚ phone, fax, email, and online Helpdesk
- ✚ automatic escalation of priority requests
- ✚ direct access to Softlink's HelpDesk to track requests
- ✚ 24/7 access to Softlink's Knowledgebase

## Upgrades

And support doesn't stop there. As a supported Softlink client you will receive regular software updates to ensure you continue to deliver leading services to your users. Softlink has a significant ongoing investment in research and development, which is driven by library communities around the globe.

## On-going relationship

Your designated support team consultant will contact you periodically to ensure your system is working optimally. We encourage you to attend regular user group meetings where we can meet with you and you can learn tips from other Oliver clients. We are looking forward to working with you in partnership for many years to come.