

## Data Conversion Services Explained

The primary reason for converting data from one system to another is to save time re-keying information. It is usually possible to import your existing enquiries database.

However there are circumstances in which converting absolutely everything in your current system to the new system would actually not give you a desirable result and may not be necessary. This is especially true when you have poor or unreliable data. You may decide that you would get a better result if you key-in information from a certain date forwards. Bailey Solutions will help you through this process and offer you recommendations for the best route to achieve the transition to Enquire.

In addition you need to view data conversion as an opportunity to tidy up your data. For example, if you don't want to bring in enquiries submitted before a certain date Bailey Solutions can easily write a line of code to remove these records, thus saving you a tiresome task.

### The 10 steps

#### Step 1 – you send us your data for examination

We need to examine your data. We can accept the following formats:

- SQL database (backup file)
- Access database (mdb file)
- Excel spreadsheet (xls file)
- Tab separated (.txt file)
- Comma separated + text in quotes as a (csv file)
- Ascii file (asc file)
- XML file (xml file)

Most legacy systems have an export function to export the data to one of these formats. If you have a choice of field separators use such an uncommon keyboard character as ~ or | to separate the fields. You need to tell us if any records should be excluded. *If you send it to us an email attachment, please ensure it is in a zip file.* During this stage you can carry on working with your data as we are only looking at it.

#### Step 2 – we examine the data

We look at the data and make judgements on the following:

- Quantity – how much data is there?
- Quality – does the data need tidying or correcting? For example, are there variant spellings? Are dates in a consistent and correct format?
- Problems – has the export process created any problems? For example, has displacement occurred where data is in the wrong field, because the field separators have not been recognised in some rows?
- Structure - what is the data structure? Does it provide a good match with the chosen system?
- De-duplication – does each record represent one copy, i.e. same title in two rows. Will we have to de-duplicate the titles and if so how will this be achieved?
- How do the fields match? – are there equivalent fields in the destination system for all the fields in the current system?
- Are there sufficient fields in the source data to build the required data set in the new system?

#### Step 3 – we produce a feasibility report and data dictionary

We produce a full report and data dictionary. This will contain our recommendations and the basis on which you have made those recommendations. The data dictionary will show the source field names and its destination field name in your new system.

#### Step 4 – we provide a quote

We provide a maximum price quote. Occasionally we break down the quote or provide alternative scenarios.

#### Step 5 – client review's the feasibility report and data dictionary

You review the feasibility report and data dictionary to see whether you accept and agree with the recommendations. This is an opportunity for clients to assure themselves that nothing has been forgotten, and that everything that you wish to retain has a home. You ask us questions about the process and plan for any conversion tasks that you will have to undertake, e.g. if you decide to tidy the publishers or keywords then you will need to plan this work.

#### Step 6 – schedule the work

Once we have reached agreement on the quote, data dictionary and the conversion services to be carried out, we then start agreeing a work schedule. The idea is to deprive you of your live data for as little time as possible, whilst Bailey Solutions are working on the live conversion. And this needs careful planning. We plan the training and installation dates carefully around the live conversion.

#### Step 7 – run the test conversion program (optional step)

With complicated data conversions, we may have suggested a test conversion, prior to live conversion. Your training may therefore be split in order to show you the test data conversion result. If this is the case you will need to plan to test the data in the new system and ensure that the conversion has carried through correctly. If any problems come to light at this stage we make corrections to the conversion program for the final live data conversion.

#### Step 8 – you send your live data to us

You send your final data to us for live conversion in the agreed format. At this stage you should not make any changes to your data, but you can still refer to it.

#### Step 9 – conversion and installation

We run the conversion program and deliver your new system with your data. Training is completed with your live data in place. You will also have the opportunity to practice with demonstration data set up for training purposes.

#### Step 10 – post conversion fixes

Data conversion is a bespoke service and each conversion is different. We may not get everything 100% perfect on your delivery day. If there are problems with your data conversion we can usually send fixes on the same day and we treat it with the highest priority.

Finally, we welcome feedback on how we can make the transition from one system to another as trouble free as possible.