[Name of Customer Agency]

Data Conversion plan

[Program Name]

Version 1.0

[Day, Month, Year]

Document History

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| --- | --- | --- | --- |
| Release No. | Date | Author | Revision Description |
| 1.0 |  |  | Initial Draft Version |
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I have carefully assessed the Data Conversion Planforthe *<<INSERT NAME OF PROGRAM>>.* This document has been completed in accordance with the requirements of the Office of Shared Solutions and Performance Improvement (OSSPI) Guidance.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

\_\_\_\_\_\_ The document is accepted.

\_\_\_\_\_\_ The document is accepted pending the changes noted.

\_\_\_\_\_\_ The document is not accepted.

We fully accept the content within this project artifact and associated tasks.

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*<<Insert Name>> <<Insert Date>>*

*<<Insert Title>>*

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# Overview

*<<This document should be reviewed and approved by both the Provider and the Customer Program Manager.>>*

## Project Background

*<< Provide a brief description of this project, including the purpose of the new or modified system, the functions it will perform, and the business processes that the system is intended to support. Also, describe the business need and benefits of the new capability that aligns the new capability with strategic goals and mission objectives or Federal legislative requirements. >>*

## Purpose

*<< Describe the purpose and objectives of the Data Conversion Plan. >>*

## Assumptions/Constraints

*<<Identify the assumptions/constraints whose outcomes affect this program. If no assumptions exist, include a sentence stating that fact. The following assumptions may be included:> >*

## Roles and Responsibilities

*<< Below is a table summarizing the key roles and responsibilities involved in executing the project's Data Conversion Plan. Modify or adjust to meet project-specific requirements >>*

| Role | Organization | Responsibility |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

**Table 1: Roles and Responsibilities**

# Conversion Overview

## System Conversion Overview

*<<Provide an overview of the system undergoing conversion. The general nature or type of system should be described, including a brief overview of the processes the system currently supports. If the system is a database or an information system, also include a general discussion of the type of data maintained, the operational sources, and the uses of those data.>>*

## Conversion Description

*<<*

1. Provide a description of the system structure and major components. If only selected parts of the system will undergo conversion, identify which components will and will not be converted
2. If the conversion process will be organized into discrete phases, this section should identify which components will undergo conversion in each phase
3. Include hardware, software, and data as appropriate. Charts, diagrams, and graphics may be included as necessary
4. Develop and continuously update the milestones for the conversion process in the IMS>>

## Type of Conversion

*<<Describe the type of conversion effort that will be used for this project.>>*

# Conversion Strategy

## Data Conversion Strategy

<< Describe the strategies for conversion of system hardware, software, and data required for this project. Describe the data conversion strategy, data quality assurance, and the data conversion controls. >>

## Data Conversion Approach

<<Describe the specific data preparation requirements and the data that must be available for the system conversion. If data will be transported from the original system, provide a detailed description of the data handling, conversion, and loading procedures. If these data will be transported using machine-readable media, describe the characteristics of those media. >>

## Data Inventory

<<List all the data files and types that will be used for conversion. If data inventory is stored in a separate document, please reference it here. >>

## Data Quality Assurance and Control

<<Describe the strategy to be used to ensure data quality before and after all data conversions. This section also describes the approach to data cleansing and quality assessment of data before it is moved to the new or converted system. >>

## Risk Factors

<<Describe the major risk factors that could affect the conversion feasibility, the technical performance of the converted system, the conversion schedule, or costs and the mitigation strategies>>

# Conversion Tasks

*<<Describe the major tasks associated with the conversion, including planning and pre-conversion tasks.>>*

## Conversion Planning

<<Describe the planning for the conversion effort. If planning and related issues have been addressed in other life-cycle documents, reference those documents in this section. The following list provides examples of conversion planning issues:

* Performance and capacity requirements
* Growth rate of the data processing
* Quality Assurance reporting and analysis>>

## Pre-Conversion Tasks

<<Describe all tasks that are logically separate from the conversion effort itself but that must be completed before the initiation, development, or completion of the conversion effort. Examples of such pre-conversion tasks include:

* Finalize decisions regarding the type of conversion to be pursued
* Install changes to the system hardware, such as a new computer or communications hardware, if necessary
* Implement changes to the computer operating system or operating system components
* Acquire and install other software for the new environment >>

## Major Tasks and Procedures

*<<Provide a name for each major task. Provide a brief description of each major task required for the conversion of the system, including the tasks required to perform:*

* Preparation of data and data cleansing
* Data extraction
* Mock conversion and testing of the system
* Data load
* Data migration
* Data validation

*If some of these tasks are described in other life-cycle documents, reference those documents in this section*

*This section should describe the procedural approach for each major task. Provide as much detail as necessary to describe these procedures>>*

## Conversion Schedule

*<<Provide a schedule of activities to be accomplished during the conversion. Pre-conversion tasks and major tasks for all hardware, software, and data conversions described in Section 3.8 should be included in the schedule and should show the beginning and end dates of each task. Charts may be used as appropriate.>>*

## Security

*<<If appropriate for the system to be implemented, provide an overview of the system security features and the security during conversion.>>*

### System Security Feature

*<<Describe the system security features that will be associated with the system when it is converted. Include references to other lifecycle documents as appropriate.*

*Describe the changes in the security features or performance of the system that would result from the conversion.>>*

### Security During Conversion

*<<Describe security risks or concerns specifically related to the conversion effort.>>*

# Conversion Support

*<<Describe the support necessary to implement the system. If there are additional support requirements not covered by the categories shown here, add other subsections as needed.>>*

## Hardware

*<<List support equipment, including all hardware to be used for the conversion.>>*

## Software

*<<List the software and databases required to support the conversion. It describes all software tools used to support the conversion effort, including the following types of software tools, if used:*

* Automated conversion tools
* Quality assurance and validation software for the data conversion
* CASE tools for capturing system design information and presenting it graphically
* Documentation tools such as cross-reference lists and data attribute generators
* Commercial off-the-shelf software (COTS) and software written specifically for the conversion effort >>

## Facilities

*<<Identify the physical facilities and accommodations required during the conversion period.>>*

## Materials

*<<List support materials.>>*

## Personnel

*<<Describe personnel requirements and any known or proposed staffing, if appropriate. Describe the training, if any, to be provided for the conversion staff. >>*

### Personnel Requirements and Staffing

*<<Describe the number of personnel, length of time needed, types of skills, and skill levels for the staff required during the conversion period.>>*

### Training of Conversion Staff

*<<Describe the training, if any, necessary to prepare the staff for converting the system. List the courses to be provided, a course sequence, and a proposed schedule. If appropriate, identify by job description which courses should be attended by particular types of staff. Training for users in the operation of the system should not be included in this section, but should be included in the Training Plan. >>*

# Appendix A: Key References

*<<Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.>>*

Table below summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| Document Name | Description | Location |
| *<<Document Name and Version Number>>* | *<<Document description>>* | *<<URL to where document is located>>* |
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**Table 2: Key References**

# Appendix B: Key Terms

Table below provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

|  |  |
| --- | --- |
| Term | Definition |
| *<<Insert Term>>* | *<<Provide definition of term and acronyms used in this document>>* |
|  |  |
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**Table 3: Key Terms**