



***Data Conversion  
Scope Assessment***  
for

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Customer Name

## Using the Data Conversion Scope Assessment

<b>Completed by:</b>	Customer Executive Management, Project Leader assisted by the FACTS Implementation Consultant
<b>Purpose:</b>	To evaluate the complexity and scope of electronic data conversion so that an accurate schedule and cost estimate can be developed.
<b>How it is used:</b>	The customer fills out this form, with the assistance of the FACTS Implementation Consultant. The Implementation Consultant uses the information provided to understand the effort required for electronic data conversion and to help in developing a proposal. After identifying the files to be converted, you should do an analysis to determine whether electronic conversion (versus manual conversion) of these files is cost-justified.
<b>When it is used:</b>	During Data Conversion
<b>Who uses it:</b>	Local FACTS Office and customer
<b>File under:</b>	Installing the System/Data Conversion
<b>Last revised:</b>	2/97
<b>File:</b>	42imcsa.exe

## Data Conversion Scope Assessment

**Type of Data:**

1. What files have been initially identified to be electronically converted?

[illegible]

\* Master, Transaction or History

2. Will you need to devote time to cleaning up these data files prior to conversion?  
☐ Not at all      ☐ Somewhat      ☐ Yes, most of the files

If so, how much time do you require to complete this task? \_\_\_\_\_  
(Date to be completed)

### Cost Effectiveness:

Have the above files been cost justified? ☐ Yes ☐ No

**Manual Entry:**

$$\begin{aligned} \text{Number of records} \times 5 \text{ min. per record} \div 60 \text{ min.} &= \underline{\hspace{2cm}} \\ &\text{\# of hours to enter data} \\ \times \text{hourly salary} &= \underline{\hspace{2cm}} \\ &\underline{\hspace{2cm}} \\ &\text{Total cost to manually enter data} \end{aligned}$$

**\*Note:** 5 minutes per record is based on data manually entered for FACTS master files such as Customer File(s), Item File(s), and Vendor File(s).

Other considerations:

- time you must devote to an employee to enter data aside of his/her daily activities
- editing/verification of data entered
- whether the live date can be met if data is manually converted
- any file less than 500 records is generally cost effective to manually enter data vs. an electronic conversion.

## Electronic Conversion:

This service can be priced various ways, for instance, hourly or a flat charge. Your local FACTS office can provide you with an electronic conversion quotation based on this scope assessment.

## Data Preparation:

1. Are current file layouts available of your existing system? ☐ Yes ☐ No  
If yes, can they be printed or available through user documentation? \_\_\_\_\_
2. Who in your organization can help to map your data files to FACTS data files?  
\_\_\_\_\_  
Name Title Phone #
3. Who will be making decisions about default data information?  
\_\_\_\_\_  
Name Title Phone #
4. Have modifications been performed to your system that may affect the standard file layouts?  
☐ Yes ☐ No  
If so, do you have the file layout changes for the modifications? ☐ Yes ☐ No
5. Can existing records be exported to ASCII format? (fixed length records or variable length with | a delimiter)  
☐ Yes ☐ No  
If not, how is your data stored? \_\_\_\_\_  
Who will perform this step? ☐ Customer ☐ Affiliate ☐ Third Party
6. What media device (tape, diskette, etc.) does your existing system use for backup purposes?  
\_\_\_\_\_
7. If incompatible media exists, do you want us to contract a third party to perform this task?  
☐ Yes ☐ No
8. Is there a technical person or vendor that can be contacted for additional help or assistance?  
\_\_\_\_\_  
Name Title Phone #
9. Can the electronic conversion be done at our offices or is on-site required?  
\_\_\_\_\_

## Data Testing:

1. Who in your organization will be testing file conversions?

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
File tested

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
File tested

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
File tested

2. Based on the type of files to be electronically converted, multiple passes may need to be done. For example, data that frequently changes must be captured on your existing system, prior to going Live on FACTS. How many conversion passes are anticipated prior to going live? (Please review with your Implementation Consultant or Programmer)

☐ One

☐ Two

☐ Three

## Other Miscellaneous Notes:

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### Local FACTS Office:

\_\_\_\_\_  
Local FACTS Office name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

### Customer:

\_\_\_\_\_  
Company name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date