U.S. Department of Energy

Project Name

Conversion Plan

September 2002

TEMPLATE

U. S. DEPARTMENT OF ENERGY

Organizational Title 1
Organizational Title 2

Change Control Page

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U.S. DEPARTMENT OF ENERGY

Organizational Title 1
Organizational Title 2

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Preface

Document Version Control: It is the reader's responsibility to ensure they have the latest version of this document. Questions should be directed to the owner of this document, or the project manager.

This document was generated by the ***PROJECT NAME*** project team. ***System/Project Name*** will be developed for the ***Organizational Name*** of the U.S. Department of Energy.

Lifecycle Stage: ***Project Name*** is in the *System Design* stage of the project lifecycle.

Approval: ***A completed stage review/exit will constitute approval of this document.***

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Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved in the ***Project Name*** project or who will become involved during the lifecycle.

1. Introduction

This section should describe the purpose and scope of the conversion plan; a brief system/project background description, and references used to develop the plan.

1.1 Purpose

Describe the purpose of the conversion plan. The plan should clearly define the system or project's conversion procedures; outline the installation of new and converted files/databases; coordinate the development of file-conversion programming, and plan the implementation of conversion procedures. Depending on the factors that must be considered for each system/ project, the conversion plan should consider the following:

- Determine if any portion of the conversion process should be performed manually.
- Determine whether parallel runs of the old and new systems will be necessary during the conversion process.
- Understand the function of the data in the old system and determining if the use will be the same or different in the new system.
- The order that data is processed in the two systems.
- Volume considerations, such as the size of the database and the amount of data to be converted; the number of reads and the time required for conversions.
- User work and delivery schedules; time frames for reports, etc.
- Whether data availability and use should be limited during the conversion process.
- The disposition of obsolete or unused data that is not converted.

1.2 Scope

Provide a general description of the boundaries of the data conversion effort. This may include the specific system functions affected; functions/data not affected/converted; discussion as to whether the conversion process will be implemented in phases or stages; what data related to certain business processes will be converted first, etc.

Note: Multiple conversion plans may be required if a system is to replace several different "current" systems.

1.3 Background

Provide a general description of the system(s) or project. This may include information on both the "current" and "new" systems.

1.4 References

Identify the sources of information/reference materials which were used to develop this document, such as IEEE, DOE's Systems Engineering Methodology (SEM), project documentation, etc.

2. Conversion Activities

This section should describe the detailed activities, resources, and schedule associated with the conversion.

2.1 Conversion Tasks/Subtasks

Identify in detail the tasks and subtasks which must be performed in order to effect the conversion. They should be listed in order of required occurrence. All task dependencies should also be identified. Note: This information may be depicted in the form of a work breakdown structure (WBS), and appended to the plan.

2.2 Resources

Identify the required personnel, equipment, staffing resources, etc., needed to perform each task /subtask. Note: Information on staffing resources may be depicted in the above referenced work breakdown structure (WBS), and appended to the plan.

2.3 Schedule

Estimate the time required to complete each task and subtask. Note: This information may be depicted in the above referenced work breakdown structure (WBS), and appended to the plan.

3. Conversion Requirements

This section should identify the data to be converted (input); the process by which the conversion will be done; the conversion results (output); and the method used to validate the conversion.

3.1 Input Data

Provide a description of the data which must be converted (prior to its use in the proposed system). The description should include its name, source form or record layout, storage medium, location, volume, size, access method, and any security considerations.

3.2 Specifications

Describe in detail how the conversion will be accomplished. If computer programs are to be used, provide their specifications, e.g., program logic, interfaces, error/exception processes, etc.

An example data cross reference chart is provided in Appendix A. The chart depicts the data layout and a cross reference between the data elements and their destination table/element in a database.

3.3 Output Data

Provide a detailed description of the data which will result from the conversion process. The description should include its name, record layout, storage medium, location, volume, size, access method, and any security considerations.

3.4 Validation

Provide a detailed description of the manual and/or automated controls and methods to be used to ensure that all data intended for conversion has been converted.

Appendix A

Example
Data Cross Reference

File Name	Data Element	Picture	Destination Table	Destination Element
B&R	B_N_R_CODE	X(9)	SPD_B_AND_R	B_AND_R_CODE
	B_N_R_TITLE	X(40)	SPD_B_AND_R	B_AND_R_TITLE
CID	O-KEY	X(9)	SPD_CID	CID_CODE
	O-TEXT	X(40)	SPD_CID	CID_TITLE
	O-OTHER	X(51)	SPD_CID	INTEGRATED_FLAG