

Conversion Review Agreement

Getting Started

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Alexandria Data Work Review Agreement

Please read very carefully and make sure to ask our Support Team any questions you might have concerning the requested work to be performed by COMPanion before completing this form. Please keep in mind that we are only human and that the tools and processes used for the work on the database could potentially have issues or flaws. It is also important to remember that any of your existing data issues (incorrect data, gaps in data, etc.) going into this process may still exist at the completion. This is why it is imperative to consider a deep data review including as much data cleanup on your part before passing your data to COMPanion.

Customer Responsibilities and Agreement

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COMPanion does not know the ins and outs of your data. Therefore we are limited in our ability to verify the complete accuracy of work performed. The COMPanion team can do basic database verifications and audit of record counts but it is up to you to review the details of your data in totality before and after the requested work has been completed.

2 Week Review Period

By completing this form you are hereby acknowledging that there are no guarantees to work performed. You also understand there will be a 2 week period that starts when the data is made available to you upon completion of the requested work. This 2 week period is for you to review in detail the completed data and bring forth any questions, issues or concerns to the COMPanion support team or COMPanion Conversions team within the 2 week timeframe so that the issues can be properly addressed and corrected.

However, due to the complexity of the conversion, once we've made the converted database available you should review the data in your database ASAP as we require YOU to review the converted data to identify issues with the conversion so that we can address them ASAP.

If the review of the data cannot be performed within the 2 week timeframe mentioned, we strongly recommend scheduling the work at a time when the data can properly be examined after the work has been performed. This may require that you plan to have your library be unavailable for a period of time while you are performing the data review.

If the issue(s) appear to be drastic, the customer agrees to immediately stop all use of the program at the time of discovery as continued operation of the program can compound any problem(s) and increase the difficulty of correcting or fixing if at all.

This allotted 2 weeks should be enough time to review the data in Alexandria and bring any questions or issues to our Support and Conversion Teams for review. Usually if there is some issue it is large and generally recognized quite quickly.

COMPanions Commitment to Our Customers

We here at COMPanion are committed to our customers and their success. If any issue or problem is brought to our attention within the 2 week review period, we will commit all of our resources to correcting and/or resolving any issues that are a result of the work we performed on your data. No matter how long it might take.

Conversion Review Agreement

Unfortunately, any issues or problems that are brought to our attention after the given 2 week review period can not be guaranteed to be fixed or reverted. The sooner we know about possible issues that might have occurred during conversion the better. Correcting any issues past the allotted 2 weeks can cause the fix to become increasingly more difficult to address and correct (if even possible at all). We will do everything within our capabilities during the allotted 2 week review period to assist with any questions or fix any problems that are due to errors during the conversion process and not due to limitations of the compatibility of the programs.

If issues arise past the 2-week review period, customers will be accountable for making corrections themselves or will have the option to pay for database cleanup and possibly restoration or a new conversion.

Work Types Covered by this Agreement

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Alexandria 5 or 6 Move to Alexandria 7

This conversion consists of converting data from the Alexandria Legacy version to the current Alexandria 7 Release. Please make sure to review the "What You Need To Do" section so that you are prepared for the changes.

Single Site Merger to Centralized Database

It is imperative to prepare your single site or facility data before it is merged into a centralized group database. When merged, any existing data issues can become greatly compounded.

It is also very important that you prepare your users for the differences in program functionality between single site management and management of a centralized database. It is imperative that a district representative be selected as mouthpiece, decision maker, and go-between for the individual site librarians. This role is usually filled by a district librarian.

This individual is in charge of deciding on specific, detailed, and carefully chosen work expectations and policies around how MARC records are imported, what MARC fields are used, the format that data should be entered into those fields, and other work habits that everyone in the district must share. These decisions must be made, thoroughly regulated, and adhered to due to the shared nature of a centralized database. In a centralized database the data, including MARC records and many preferences, are shared by the entire group; i.e. each and every site or facility under the centralized database umbrella.

An official Alexandria training individually for the district librarian is very strongly recommended, as well as a separate one in which the district librarian instructs alongside our trainer how the new centralized group of librarians and users will need to be using the new program setup.

Any Specialty Data Work Before and After the Conversion; Including Having Your Collection "Cleaned Up", or if Your Records Are Being Manipulated By One of Our Third Party Services

After the conversion, we can do basic database verifications and audit record counts. It is up to you to review the details of your data after the requested work has been performed and ask questions or bring up possible issues to the attention of the COMPanion team.

However, due to the complexity of the conversion, once we've made the converted database available you should review the data in your database ASAP as we require YOU to review the converted data to identify issues with the conversion so that we can address them ASAP.

This allotted 2 weeks should be enough time to review the data in Alexandria and bring any questions or issues to our Support and Conversion Teams for review.

The sooner we know about possible issues that might have occurred during conversion the better. Correcting any issues past 2 weeks can cause the fix to become increasingly more difficult to address and correct (if even possible at all). We will do everything within our capabilities during the 2 week review period to assist with any questions or fix any problems that are due to errors during the conversion process and not due to limitations of the compatibility of the programs.

If issues arise past the 2-week review period, customers will be accountable for making corrections themselves or will have the option to pay for database cleanup and possibly restoration or a new conversion.

If You Are Moving Your Current Alexandria Database from Distributed Catalogs into a an Existing Centralized Catalog or Splitting One or More Catalogs from an Existing Centralized Database

You will need to go through Item and Patron policies as well as other preferences that are not carried over when splitting or combining databases. A thorough audit of all preferences is advised. Make sure to verify newly added or split operator logins, as well. You will also want to verify accuracy of the newly added records, keeping in mind for potential adjustment or affects upon the existing data (MARC merges, etc.). This should include consideration for eBook titles as a title record is not site specific and therefore belongs to all sites. When moving to a single site from a centralized database your item export will not include eBook titles without copies. You will want to work with your vendors to gather eBook import files for you to import into your database after the split has been completed by the COMPanion Conversions team. For more Centralized management information please see the "**Single Site Merger to Centralized Database**" section above.

If You Are Converting from a Non-Alexandria LIS Database to an Alexandria Database

Be aware that only your items (Titles and Copies) will convert unless otherwise specified in your order. You will not lose any data in your MARC records, although Alexandria may not "see" some data due to deviations from standards. Customer Support can help correct some of those differences once you've identified them.

In addition, Customer Support can assist you with importing patrons or using one of the automatic SIS integration options available with Alexandria.

What You Need to Do

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It is important to be diligent and detailed in reviewing your data after the conversion process has been completed.

Before the conversion you should do the following:

If you're converting from Alexandria v5 or v6...

- Review and become familiar with the See What Changed and Things to Do tabs of our Switch to Alexandria 7 Support Center page.
- Understand that you are responsible for recreating the following data, as it will NOT convert. Alexandria v6 contains reports to help you identify the elements you need to replace. You should run and save those reports before you send your data for conversion.
 - Preferences
 - Saved Reports
 - Saved Utilities
 - Explore Panes

For all Data Conversions Types

- Understand that circulation will not transfer and will need to be reproduced with transaction scripts. We will try our best to reproduce your circulation; however, there might be missed circulation you will need to reproduce yourself. Please run the following reports so you have a record of your circulation:
 - [Loaned Items Information](#)
 - All of the special status reports
 - [Archived Copies](#)
 - [Discarded Copies](#)
 - [In Processing Copies](#)
 - [Library Use Copies](#)
 - [Lost Copies](#)
 - [On Order Copies](#)
 - [On Repair Copies](#)
 - [Unknown Copies](#)
 - [Charges and Overdue Fines - Complete](#)
 - Holds and Reservations will not be transferable so plan accordingly. You can print the following reports to see what will not be transferred
 - [Holds Reports#In-StockHolds](#)
 - Preferences will have to be set up by the customer as these do not transfer over
 - [Special Reports#PatronPolicies](#)

For Data Clean Up (COMPAnion Conversions, Mitinet or another company)

- Work closely with the conversions team or one of our partners to understand fully what will be cleaned up and what will not be before the work is performed.
- Make time to fix cataloging issues before integration into Alexandria based on recommendations made by the conversions team or one of our partners.
- After making recommended changes, have the data run through the clean up process again before it is applied to your live data.

Self-Hosted Customers

- Note, there is an extra annual charge for supporting Self Hosted Customers; the easiest and least expensive solution is to let us host your data.
- If you choose to Self Host, review and become familiar with the [Alexandria Install Requirements](#).

By completing this form, you are hereby acknowledging that you have read and understand the information listed in this document and you are aware of the limitations of the conversion and Data Clean-Up processes and are agreeing to the specified timeframe for conversion work review period.

Name required

Position or Role required

School, Institution, or Site required

Serial Number required

Email required

A copy of your agreement will be sent to this email address.

Date required

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