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⌐C⌐ COMPanion®

KeepnTrack Conversion Form

Complete this form and email it to support@keepntrack.com.

DETAILS ON THE CONVERSION

Please read very carefully and make sure to ask our Customer Support Team any questions you might have concerning the requested work to be performed by COMPanion *before* completing this form. It is in your best interest that you read and understand the details of this KeepnTrack conversion to avoid any confusion as to what information is going to be converted and as to what work we recommend you complete in the old system before the move is made. IMPORTANT: The new KeepnTrack is an entirely new program and works differently from the old and it is for this reason there is a lot of data that is not transferable to the new system.

Conversions take time and by signing this document you are doing so with the understanding there is a 24-48 business hours time allotment for the conversion work to be completed.

IMPORTANT: ALL CONVERSIONS ARE FINAL. By completing this form you are stating that you have done the due diligence of reviewing important details of the conversion, the new program's differences and changes, and that you have completed the work necessary to collect any data or information needed from the old system before the conversion; e.g. history records reports, a list of the activities you use, a copy of the sms/email notification lists, or screenshots of your preferences.

Once the conversion has been completed and the move to the new system has been made there will not be an option to utilize the old system or its data outside of the COMPanion internal network. For this reason you are agreeing to a 2 week time limit of data review. Any issues or concerns of the state of or issues with converted data must be reported to our support team within this timeframe so they can be addressed. After 2 weeks have passed the old site will be shut down permanently on our internal servers and the data will be removed.

WHAT YOU NEED TO DO: Before and After the Conversion

The new KeepnTrack will convert your Person (user) data, and no other data—so before switching to the new KeepnTrack, you'll want to do the following:

- KeepnTrack is a secured program and our support team cannot access your system without a customer-provided username and password, as well as strict approval. For this reason, you must verify that your KeepnTrack User's and/or operators' Usernames and Passwords work and are correct before the conversion.
- Clean up your People records! Run some reports to see what Person records you have. Run the Remove Person Records utility to get rid of records you no longer need.
- The individual person records will be altered in the conversion process to accommodate the new program's layout and operation. Some fields will not carry over such as the Site field. Person ID will NOT be converted into Barcodes in the new program; new barcodes will be assigned by the program upon conversion. If you need to save your Person ID information, make sure to run a report of it.
- Do you want to save volunteer records or any other reports? Run your reports now, download the PDFs, and store them in a secure location. Alternatively, export the data that you need so you can work with it in a spreadsheet format.
- Review the Activities you have set up in Keepntrack. Create an outline of the activities you'll want in the new version (per site), so you can set it up easily later. Be aware that the new KeepnTrack does not yet support Destinations.

- Do you have pending volunteer applications? Be sure to handle these before you convert. Currently, the new KeepnTrack does not have a volunteer form; we recommend creating one using a service such as Google Forms and updating your links.

Please review all the makeover details on our online support center before the conversion here: https://support.keepntrack.com/keepntrack-makeover/

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

Name (print): _____

Position/role: _____

Facility/institution: _____

Email: _____

Requested Conversion Date: _____

Date: _____   Signature: _____