THIN LINE SOFTWARE
PRE-CONVERSION CHECKLIST

# A pre-conversion checklist

Originally published: June 2026 · Last reviewed: September 2026

Printable take-away from Moving public-safety data without leaving the records behind.

## A pre-conversion checklist

### Before selecting the new vendor

- [ ] Define the records that need to be converted
- [ ] Ask exactly what the vendor can convert
- [ ] Identify conversion cost and who performs the work
- [ ] Ask how attachments, master records, and relationships are handled
- [ ] Ask how validation and acceptance work
- [ ] Ask whether historical data can be backfilled later
- [ ] Confirm export rights, format, attachments, and termination terms for the new contract

### Before requesting the old data

- [ ] Determine who owns or controls the source data
- [ ] Ask the outgoing vendor about export lead time and fees
- [ ] Request database documentation and lookup/code tables
- [ ] Request attachments and how they relate to parent records
- [ ] Ask what is excluded

### Once the export arrives

- [ ] Preserve an untouched source copy
- [ ] Verify that the files can be opened
- [ ] Inventory source tables and files
- [ ] Confirm attachments and lookup tables are present
- [ ] Document source version where possible

### During conversion

- [ ] Map major record types and preserve historical identifiers
- [ ] Map employee and user identities
- [ ] Translate known lookup values
- [ ] Preserve record relationships
- [ ] Track conversion exceptions

- [ ] Review duplicate masters conservatively

### Before giving up the old system

- [ ] Final export received and readable
- [ ] Documents and attachments received
- [ ] Major record counts reviewed and differences explained
- [ ] Complicated samples validated
- [ ] Relationships, search, restrictions, and financials tested where applicable
- [ ] Known exceptions documented or accepted
- [ ] Operational users reviewed the data
- [ ] Agency sign-off completed
- [ ] Source snapshot preserved appropriately

Generated from the Thin Line Software resource library. Read this guide online: https://thinline.software/resources/public-safety-data-conversion-guide#pre-conversion-checklist