

Standard Data Conversion Analysis (Final ONLY)

Conversion from BiblioTECH v8 into Oliver v5

The following field and data mappings are standard. *Variations may be considered but will require additional data conversion service charges and a trial conversion.*

Modules Converted

- a) Catalogue (Resources & Copies)
- b) Borrowers
- c) Current loans and Loan History

Branch

Copy and borrower records requiring a Branch name in Oliver are assigned the Branch name of '**Library**'.

Catalogue

Resource Merging

Catalogue resources converted from Bibliotech are merged so that copies from matching resources in Bibliotech are assigned to a common and singular resource record in Oliver to provide for improved management of catalogue resources and holdings.

Softlink will analyse your catalogue and will determine the most effective means of merging resources that represent the same bibliographic resource. Resource matching and merging is based on our experience converting many Bibliotech catalogues to Oliver v5.

No Barcode

Any records with a blank Barcode value are converted with a temporary barcode unless that resource is identified as a *website* by its GMD/BibType, in which case the resource has not received a copy.

Copies receiving a temporary barcode are assigned a cataloguing tag of "Temporary Barcode" to assist you in updating these copy barcodes after the conversion is completed. Where no copy is converted, copy field data is discarded by the conversion.

Resource fields

The following fields from the BiblioTECH *Resources tab* are converted to Oliver as specified:

• **Softlink Australia**

- Brisbane
- t: +61 7 3124 6111
- e: sales@softlinkint.com

• **Softlink Europe**

- Oxford
- t: +44 1993 883 401
- e: sales@softlink.co.uk

• **Softlink America**

- Seattle
- t: +1 877 454 2725
- e: sales@softlinkamerica.com

• **Softlink Pacific**

- Auckland
- t: +64 9 415 7790
- e: sales@softlinkpacific.co.nz

*Note that fields in this table will only be converted for the first Resource where merging occurs. See *Resource Merging* above.

BiblioTECH Field	Oliver Field	Notes
Accession No.	Catalogue ID	This field is unique to each record in the BiblioTECH catalogue and is used to uniquely identify each resource in Oliver.
Dewey	Classification	
Author	Author	Trailing full-stop is removed if present.
Responsibility (Respllus)	Statement of Responsibility	Trailing full-stop is removed if present.
Title	Title	
Other Title/Alt-Title	Other Titles	
Sub-Title	Title	Appended to title and separated by a colon " : "
Edition	Edition	
Subject	Subjects	Trailing semi-colon is removed if present. Terms separated by a semicolon ';' are converted as separate Subject terms.
Tag(s)	Tags	Oliver v5 tags are a catalogue management tool and are not visible in Search/Orbit results.
Notes	Notes	Notes associated with the first resource converted are converted to the Oliver v5 resource where resources are merged. (see Copy Fields and Resource Merging)
RDA-GMD	Content Type	The contents of this field are parsed to extract the relevant RDA types. (Catalogue source is not converted.)
	Media Type	
	Carrier Type	
Series	Series	
Series No.	Series (part)	

Material Type (GMD)	GMD (BibType)	<p>For details, please refer to the GMD and BibType mapping section in the Data Mapping section below in this document.</p> <p>[Square brackets], trailing full stops and some other punctuation are removed from terms as they can interfere with searching in Oliver.</p>
ISBN	ISBN	
Extent	Description	
Publisher	Publisher	Trailing comma is removed where present.
Publishing Place	Place	[Square brackets] are removed from this field as they can interfere with searching in Oliver
Publishing Date	Publication date	The last 4 characters in this field are also used as the sorting year for searches in OPAC where they are all numbers. I.E. they form a 4 digit year.
Weblink (URL)	URL / Related URLs (or Resource Notes)	<p>URLs starting with 'www.' are prefixed by 'http://' in the conversion. URL's must begin with 'http://' to be converted to Oliver.</p> <p>Values not matching these criteria have been converted to the notes field.</p>
Rating	User List 3	
Lexile	User List 4	
Genre	Genre	In Oliver v5, Genre is an authority list similar to Subjects or Authors.
Language	User List 5	

Copy Fields

BiblioTECH Field	Oliver Field	Notes
AccessionNo	Accession Number	
Dewey	Classification	
Barcode	Barcode	See the section 'No Barcode' for handling of records with blank barcodes.
CopyNo (CopyRef)	Copy Id	
Supplier	Supplier	
Price	Cost	
User1	User List 6	
User2	User List 7	
User3	User List 8	Not displayed in all systems.
Condition	Status <i>and</i> Notes	<p>For details, please refer to Status mapping in the Data Mapping section below in this document.</p> <p>The whole content of this field is appended to the Notes field and separated from other Notes data by a line-break.</p>
Container	Status	Identifies a copy as a Resource Box in Oliver. Copies which have this copy as 'master' have been added as items contained in this resource box.
Trap Message	Alert Message	Displays in Circulation Desk whenever the copy is scanned.
Max Loan Days	User List 9	Max Loan Days represents the loan period assigned to the copy in Bibliotech and can be used as a reference for establishing lending rules in Oliver.
Entry Date	Received	
Date Modified	Last Touched	

BiblioTECH Field	Oliver Field	Notes
Notes	Notes	The notes from each Catalogue record are converted for the corresponding copy. The notes from the first copy in a group of merged copies is also converted to the resource they are merged onto. (See Resource Merging and Resource fields.)
Location	Collection	

A note on Location terms in Biblotech copies.

Biblotech stores the names of its Locations as patron records. In some circumstances, copy loans may be attributed to these pseudo borrower records in Biblotech (e.g. copies assigned to the LOST location). To preserve these loans in Oliver v5, the Location names have been converted as borrower records that may or may not be needed. You may wish to delete these borrowers once you complete your transition to Oliver v5.

Borrowers

The following fields from the BiblioTECH "Editing Patron" screen have been converted to Oliver as specified:

BiblioTECH Field	Oliver Field	Notes
PatronID <i>(displayed in the title bar of the "Editing Patron" screen.)</i>	--	Used to link Borrowers with Loans records internally. Not converted.
Family Name	Family Name	Displayed as "FamilyName, PersonalName".
Given Name	Personal Name	
Preferred Name	Middle Initial	Wrapped in Brackets. Can be included in name display with FamilyName and PersonalName.
Level	Scholastic Year, Borrower Loan Category (BLC) & Borrower Type	<p>Scholastic Year field is only converted for Borrowers with Borrower Type of 'Student'.</p> <p>Borrower Loan Category (BLC) groups borrowers for assignment of lending restrictions.</p> <p><i>Borrower Type is assigned based on the patrons Bibliotech Level as defined in the "Borrower Type" section below.</i></p>
Group	Roll Class (Students) or Department (Staff)	<p>Roll Class field is only assigned for Borrowers with Borrower Type of Student.</p> <p>Staff and other Borrower Types receive this value as Department.</p>
AdminID	Alias	AdminID has been used as Alias ONLY if Barcode is blank.
Barcode		If neither is present a temporary barcode has been assigned
UserField	--	Not converted
Studnum	Student Code	
MaxDays		
MaxResources	--	Not converted. Oliver controls lending differently to Bibliotech.
dob	Birthday	

BiblioTECH Field	Oliver Field	Notes
house	User List 1	
Email	Email	
Telephone	Phone	
Address1	Address	
Address2	Address	Appended to Address1, separated by linefeed
Address3	Address	Appended to Address1, separated by linefeed
Town	Address	Appended to Address1, separated by linefeed
Country	Address	Appended to Address1, separated by tab
Postcode	Postcode	Version 5 only. Appended to address in version 3
Gender	Gender	
Campus	User List 2	
Password	Password	If not set in Bibliotech then the password is blank until set by the borrower or updated by the library. <i>(Borrowers have only OPAC access unless changed by the Library administration.)</i>
Comment	Notes	
Trap_message	Alert Message	
Parent1/Guardian1	Mailing Title	
Parent2/Guardian2	Mailing Title	Appended to Parent1/Guardian1, separated by " & ".
_created	Date Registered	
_modified	Date Visited	

Current Loans

The following fields from the BiblioTECH Current Loan records are converted into Oliver as specified:

BiblioTECH Field	Oliver Field	Notes
Location	-	Used internally in the conversion to look up the Borrower Alias.
Barcode	Barcode	
Loaned	Date Lent / Time Lent	
Due	Date Due / Time Due	

Historical Loans

The following fields from the BiblioTECH Loan History / transaction records are converted into Oliver as specified:

BiblioTECH Field	Oliver Field	Notes
Action	-	Used to determine whether the record is a loan or return.
_created	Date Lent / Time Lent OR Date Returned / Time Returned	If the action is 'L', the created date will be used as the Date/Time lent. If the action is 'R', the created date will be used as the Date/Time returned.
Barcode	Barcode	
Patid	-	Used to link the loan to a valid borrower alias.

If a valid overdue record can be linked to the historical loan transaction, the date contained in the overdue record is used for the due date. If not, the date returned is used as the due date.

Data Mapping

The following Oliver lists and groups are converted from one or more fields in BiblioTECH.

Collection & Resource Loan Category (RLC)

Copy Collections are converted 'as is' from the resource tab "Location" field. If "Location" is blank the Copy has not received a Collection value in Oliver.

Resource Loan Category (RLC) groups resources for the purpose of assigning lending restrictions such as loan period and loan limit. Each Copy in Oliver must have an RLC. Lending rules must be configured in the Lending Rules Matrix in Oliver after the conversion is finished for each RLC/BLC combination.

RLC terms are also converted according to the Resource tab "Location" for each copy.

GMD & BibType

GMD determines the OPAC image displayed with the record. **Bibliographic Type (BibType)** determines cataloguing template, i.e., fields available to record/display Resource information in Oliver.

BibTypes for resources converted to Oliver are assigned according to their GMD (Material Type). Default values (GMD = **text**, BibType = **M**) are assigned if no GMD value is present. Softlink will assess the GMD terms and determine appropriate BibTypes for each. You can change these after the conversion if you need to.

Status

The Status of a Copy has been determined by the Condition field in BiblioTECH. *Default Status* = '**Available**'.

- If the word 'LOST' is present anywhere in the Condition field the Copy has received a Status of '**Missing**'.
- If the Condition field does not contain the word 'LOST' or is blank, the Copy has received the default Status of '**Available**'.
- If a Current Loan for a Copy is converted the Copy has received a Status of '**On Loan**'.

Borrower Type & Borrower Loan Category (BLC)

Borrower Type determines the template (fields) displayed to record Borrower information in the user interface. There are four possible Borrower Types (Student, Staff, External and Institution). Alternate Borrower Types can be reassigned for borrowers at your discretion after the conversion.

Borrower Loan Category (BLC) groups borrowers for assignment of lending restrictions such as loan limits and loan periods.

Lending rules must be configured in the Lending Rules Matrix in Oliver after the conversion is finished for each RLC/BLC combination.

The Patron's Level value is used to define their Oliver borrower type & BLC as follows.
{Example Only - Type assignments may be assigned differently when Softlink assesses you data.}

Level	Borrower Type & BLC
0	Student
1	Student
2	Student
3	Student
4	Student
5	Student
6	Student
7	Student
8	Student
9	Student
10	Student
11	Student
12	Student
13	Staff
14	Staff
15	Staff
16	Staff
17	Staff
18	Staff
19	Staff
20	Staff

Default values: BLC = **General**, Borrower Type = **Student**