

CSV Standard Conversion Datasheet

Summary

The conversion from CSV files is a well-established conversion process that our dedicated conversion team has performed many times with great results.

Here is an outline of the process...

- You supply us with your data and screenshots via our secure FTP service
- After consultation with you, Softlink will produce an analysis report including agreed mappings for the conversion.
- A trial conversion is run for you to check
- You send your live data via our secure FTP service
- The live conversion is run

What is a Standard Conversion?

A standard data conversion includes conversion of data 'as is'. This means one to one field and record mapping is assumed, no data cleansing will be performed, and changes outside the scope of the agreed analysis will not be possible.

What is data cleansing?

Data cleansing is any activity not specifically defined in the scope of the conversion that changes, merges, deletes or filters data, or converts different records from the same place in different ways. Data cleansing outside the scope of a standard conversion is available via the Premium Conversion Service.

What we Convert

The following modules are included in the standard conversion:

- Catalogue (Resources & Copies)
- Borrowers
- Circulation (Current Loans & Loans History)

Conversion of modules not mentioned above is not part of the standard conversion. Please contact Softlink if you require additional modules to be included and we are more than happy to provide a quote.

For more information, refer to Data required section below.

Field Mappings

Softlink requires screenshots of all modules to be converted, matching the CSV file provided AND column headings and / or explanations for CSV files.

Field mappings will be agreed during the analysis stage. One to one field and record mapping is assumed unless specifically mentioned, with all records to map the same way for each table or file converted. *Data cleansing* and changes to the agreed field mappings after the analysis stage are not part of the standard conversion, but can be arranged as part of the Premium Conversion Service.

Data required

- Up to the **maximum of 5 CSV files**, one for each section (Resources, Copies, Borrowers, Loans & Loans history). Resources & Copies information can be provided in a single CSV file instead of 2 separate CSV files. Similarly, Loans & Loans history information can be provided in a single CSV file instead of 2 separate CSV files.
- A unique link must exist between the CSV files as specified below:
 - Resources and Copies (if 2 separate files are provided)
 - Copies and Loans & Loans history
 - Borrowers and Loans & Loans history
- Refer to the table below for more information:

Category	Details of what is required
1. <i>Resources & Copies</i>	<ul style="list-style-type: none">CSV data of the existing Resources with the fields required for the conversion. (e.g.: Title, ISBN, Author, Subjects, Publication Details, Series)If Copies (barcode) conversion is required, this information needs to be in the same CSV or a separate file. (e.g.: Barcode, Collection, Classification, Cost) If a separate CSV file is used for Copies conversion, there must be a link in the Copies CSV to the Resources CSV.
2. <i>Borrowers</i>	<ul style="list-style-type: none">CSV data containing Borrower records (e.g.: Borrower Barcode, Name, Address, Department)
3. <i>Current Loans</i>	<ul style="list-style-type: none">CSV data containing loans information. (e.g. Borrower Barcode, Title, Resource Barcode, Loan Date, Due Date)There must be a link to the borrower record (i.e.: Borrower Barcode) and the copy record (i.e.: Resource Barcode)
4. <i>Loan History</i>	<ul style="list-style-type: none">CSV data containing loans history information. (e.g.: Borrower Barcode, Title, Resource Barcode, Due Date, Return Date)There must be a link to the borrower record (i.e.: Borrower Barcode) and the copy record (i.e.: Resource Barcode)

If you are converting other modules, we can provide more information on what the CSV files should contain for those modules.

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