DAVE/LibCode 7 Standard Migration to Oliver v5 Datasheet

Summary

The DAVE/LibCode 7 conversion is a standard conversion that our experienced conversion team has performed many times with great results. Here is an outline of the process…

- You supply us with your data and barcode samples via our secure FTP service
- After consultation with you, a trial conversion is prepared for you to check
- Any changes that might be required are to be discussed with Softlink
- 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 items are included in the standard conversion. All the listed Oliver v5 modules are converted into. Other module/record types can be converted upon request, although this may incur an additional charge depending on complexity.

Catalogue

Catalogue records from DAVE/LibCode 7 are migrated to the Oliver Cataloguing Module as Bibliographic Resources, Authority terms (Subjects, Authors etc.), Copies, and Resource Boxes.

Resources

Selected Bibliographic data displayed in the DAVE/LibCode 7 Add & Edit Item screen is converted to corresponding fields in Oliver Resources. Data from the Description Files area of the Catalogue Details is included in the Resource > Description field.

Catalogue resources marked as deleted are not migrated to Oliver v5.

Authority files

Data related to a resource, contained in the Authors, Subjects, Tags (keywords) and Description Files areas is also converted to appropriate fields in the resource. These terms can be maintained in the Cataloguing > Authority Control area in Oliver v5.

Subjects

Subject term are converted from DAVE/LibCode 7 Thesaurus terms. Thesaurus Terms that are References of a main subject thesaurus term are converted as Subject terms and linked as See also subject terms of the Subject term they are referenced by.

Series

All valid Series terms present in the DAVE/LibCode 7 Other Data > Series list are migrated to the Cataloguing > Authority Control > Series List.

Author

All valid Authors terms present in the DAVE/LibCode 7 Other Data > Authors list are migrated to the Cataloguing > Authority Control > Authors List.

Publisher

All valid Publishers terms present in the DAVE/LibCode 7 Other Data > Publishers list are migrated to the Cataloguing > Authority Control > Publishers List.

Keywords

All valid Keywords terms present in the DAVE/LibCode 7 Other Data > Keywords list are migrated to the Cataloguing > Authority Control > Keywords (User Authority 1) List.

Copies

Copy records in Oliver are linked to their associated Bibliographic Resource record according to their catalogue to copy relationship in DAVE/LibCode 7. Copies marked as deleted are not migrated to Oliver v5.

Duplicate barcodes found in the catalogue will be modified to make them unique. Loans and Loan Histories associated with these copies will be linked to the modified barcode correctly. Note that records such as Reservations and Resource Boxes related to a copy that has a duplicate barcode will associated arbitrarily with the copy that the migration process encounters first.

List files

Several list files are associated with copies in Oliver v5. List terms are converted from the relevant list in DAVE/LibCode 7 and where the term is related to a copy record that term will appear in the corresponding field in the Copy record.

Branch

Oliver v5 defines Catalogues by the "Branch" that they belong to. DAVE/LibCode 7 "Site" values are migrated to Oliver v5 as Branches and copies are assigned the branch according to the Site they were associated with in DAVE/LibCode 7. Unused Branch (site) terms can be removed from Oliver v5 after migration if they no longer required.

GMD

All valid GMD terms present in the DAVE/LibCode 7 Other Data > GMD list are migrated to the Cataloguing > Authority Control > GMD List. Where these terms are referenced by a Catalogue Item in DAVE/LibCode 7 the appropriate GMD term will be displayed on the Resource record.

Supplier

Supplier records held in DAVE/LibCode 7's Other Data > Suppliers list are migrated to Oliver v5. Migrated information about the supplier includes Name, Phone, Contact Person, Fax, Email, URL and address.

Collections

Collections in Oliver v5 represent categories or types of resources. Collections are associated with copies as in some cases two copies of the same resource may be in different collections (e.g. general lending and class sets). Collections are migrated from the DAVE/LibCode 7 Other Data > Locations. If no Location is set for a copy no collection is assigned in Oliver v5.

Resource Loan Categories

Resource Loan Categories (RLC) define the grouping of catalogue copies for the purpose of assigning lending rules. The DAVE/LibCode 7 Location term associated with a copy is also used as the RLC in Oliver v5. If no Location is set for a copy, the default RLC of 'General' will be used.

Resource Boxes

In a similar manner to DAVE/LibCode 7, Oliver v5 Resource boxes allow for multiple resources to be circulated as a box set. Resource boxes from DAVE/LibCode 7 are converted to Oliver v5 as boxes

with a barcode of their own and associated with a resource named after the DAVE/LibCode 7 Box Type they were linked to.

UserList1
The User Defined List, UserList1 is populated with the FUND data associated with each copy in your Catalogue. This list can be managed in Management > List Files in Oliver v5 and the List can be set to display in relevant Issue record views throughout Oliver v5.

UserList2
The User Defined List, UserList2 is populated with the Reading Level data associated with each Catalogue record in your Catalogue. This list can be managed in Management > List Files in Oliver v5 and the List can be set to display in relevant resource record views throughout Oliver v5.

Circulation

In Oliver the Circulation module comprises the management of Borrowers, their loans and reservations and other borrower related functions. The following Circulation records in Oliver are migrated from DAVE/LibCode 7.

Borrowers
Most fields shown in the Borrower Details screen in DAVE/LibCode 7 are converted where they have a corresponding field in the Oliver borrower record. Borrowers are assigned a Borrower Loan Category (BLC) of Staff or Student according to the group they are assigned to in DAVE/LibCode 7.

Loans
Loan records from DAVE/LibCode 7 that are related to a valid borrower and copy and have valid loan dates will be migrated to Oliver v5.

Loan History
DAVE/LibCode 7 Loan History records are converted to Oliver v5 even if the borrower or copy record is not present in the catalogue. Information about the resource and borrower held in the DAVE/LibCode 7 history records will be converted to Oliver v5 in the history record wherever possible.

Reservations (where present)
Current (unexpired) reservations will be migrated to Oliver v5 where the borrower and copy are both present in DAVE/LibCode 7 to link the reservation to.

Field Mappings

Field mappings are standard and are hardcoded into the conversion program to migrate data into the most appropriate field in your new system. These mappings have been developed from our lengthy experience with this type of conversion. Changes to these mappings are not part of the standard conversion, but can be arranged as part of Softlink's Premium Conversion Service.

Data required

The entire DAVE/LibCode 7 system application folder including all files and folders.