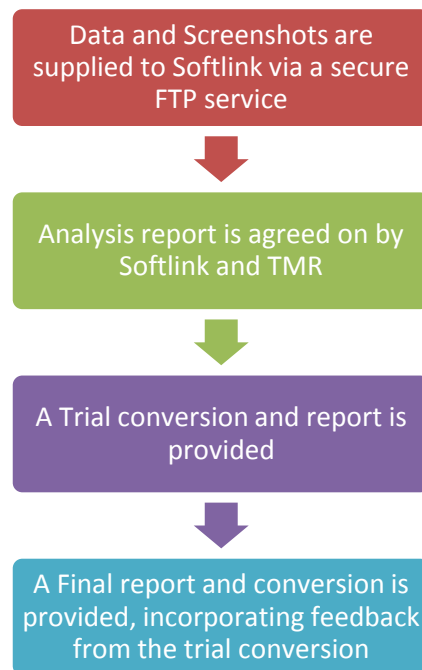# DBText Standard Conversion Datasheet

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…

```
┌─────────────────────────────────┐
│ Data and Screenshots are        │
│ supplied to Softlink via a      │
│ secure FTP service              │
└─────────────────────────────────┘
              ↓
┌─────────────────────────────────┐
│ Analysis report is agreed on by │
│ Softlink and TMR                │
└─────────────────────────────────┘
              ↓
┌─────────────────────────────────┐
│ A Trial conversion and report   │
│ is provided                     │
└─────────────────────────────────┘
              ↓
┌─────────────────────────────────┐
│ A Final report and conversion   │
│ is provided, incorporating      │
│ feedback from the trial         │
│ conversion                      │
└─────────────────────────────────┘
```

What is a Standard Conversion?

The standard data conversion migrates data 'as is'. This means one to one field and record mapping is assumed, data cleansing will be limited to that which is required to move the data into the destination solution, and changes outside the scope of the agreed analysis may result in additional charges.

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, assuming a source file is provided for each:

- 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 proposal.

Field Mappings

Softlink requests screenshots of all modules to be converted, to facilitate analysis and testing.

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

- **Exported CSV files** for each section included in the accepted conversion proposal (Resources, Copies, Borrowers, Loans & Loans history). Resources & Copies information may 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.
    - *Softlink will provide sample export instructions from DBText*

- A unique link must exist between the CSV files as specified below:
    a) Resources and Copies (if 2 separate files are provided)
    b) Copies and Loans & Loans history
    c) Borrowers and Loans & Loans history

- Data elements are required in each exported file are as follows:

Category	Details of what is required
1. *Resources & Copies*	• 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 or a separate file. (e.g.: Barcode, Collection, Classification, Cost) • If a separate CSV file is used for Copies conversion, there must be a linking field in the Copies CSV and Resources CSV.
2. *Borrowers*	• CSV data containing Borrower records (e.g.: Borrower Barcode, Name, Address, Department)
3. *Current Loans*	• 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. *Loan History*	• 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 exported CSV files should contain for those modules.

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