Metamarc Standard Conversion Datasheet

Summary

The Metamarc conversion is a well-established standard conversion 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
- 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 modules are converted. Other modules can be converted upon request, although this may incur an additional charge depending on complexity.

Resources & Copies

In general, fields that appear in the "**Edit Catalogue record**" and "**Edit Item**" screens in Metamarc will be converted into appropriate Resource and/or Copy fields in your Softlink product, though some exceptions may apply.

Resources in Metamarc are stored in a MARC-like format. The MARC database in your Softlink product will be populated from the MARC field and subfield values on each Metamarc Resource record.

Borrowers

In general, fields that appear in the "**Edit Patron**" screen in Metamarc will be converted into appropriate Borrower fields in your Softlink product, though some exceptions may apply.

Current Loans

In general, Current Loans that appear against a Borrower record in the "**Circulation App**" screen ("Loans" tab) in Metamarc will be converted as Current Loans attached to the converted Borrower record in your Softlink product. Current Loans referring to non-existent Borrower or Copy records will not be converted. Loan History records will not be converted.

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 the Premium Conversion Service.

Data Required

Metamarc File	Description
MAT	Resources MARC File
BARNDX	Resource Barcodes
PATRON	Borrowers
ACS	Copies & Current Loans
XREF	List file codes and values - including GMDs, Patron Levels and Call No. Prefixes

To assist with the analysis, we need the following additional information from your Metamarc system:
- A CSV export, screenshot or report showing the "Item Status Codes" used in Metamarc and their corresponding Status terms.