

Data Sending Instructions

Source Data: MARC21 export/s and/or delimited export/s
(comma-separated/CSV or tab-separated)

SOURCE FILES Required From Current Library Management System

Category	Detail of what is required
1. <i>Catalogue (Resources and Copies)</i>	<ul style="list-style-type: none"> MARC21 file/s containing Resource data (e.g.: Title; ISBN; Author; Subjects; Publication Details; Series) and also Copy data (e.g.: Barcode; Collection; Classification; Cost) if possible. <p>AND/OR</p> <ul style="list-style-type: none"> Delimited files (CSV or tab-separated) containing Resource data and also Copy data if possible. If the Copy data is in a separate file from the Resource data, there must be a linking field present in both files that links the Resource records to the Copy records.
2. <i>Borrowers</i>	<ul style="list-style-type: none"> Delimited files (CSV or tab-separated) containing Borrower data (e.g.: Borrower Barcode; Name; Address; Department).
3. <i>Current Loans</i>	<ul style="list-style-type: none"> Delimited files (CSV or tab-separated) containing Current Loans data (e.g. Borrower Barcode; Title; Copy Barcode; Loan Date; Due Date). There must be a link to the Borrower record (i.e.: Borrower Barcode) and the Copy record (i.e.: Copy Barcode).
4. <i>Loan History</i>	<ul style="list-style-type: none"> Delimited files (CSV or tab-separated) containing Loans History data. (e.g.: Borrower Barcode; Title; Copy Barcode; Due Date, Return Date). There must be a link to the Borrower record (i.e.: Borrower Barcode) and the Copy record (i.e.: Copy Barcode).

Please provide up to **maximum 5 files**, one for each section (Resources, Copies, Borrowers, Current Loans, and Loan History). Resources & Copies information can be provided in a single file instead of 2 separate files. Similarly, Current Loans and Loan History information can be provided in a single file instead of 2 separate files.

Please provide screenshots of all modules to be converted, matching the data provided for the Trial Conversion **and** column headings and / or explanations for each delimited file.

Please compress the files before sending by using a zip utility.

SCREEN CAPTURES + BARCODES Required

Please save all screenshots / reports in a single file and send to Softlink via ftp together with the data.

Please provide screenshots of all modules to be converted, matching the data provided for the trial. Please also ensure the delimited (CSV or tab-separated) files **contain headings and/or explanations** for each column.

CATEGORY	DETAIL OF WHAT IS REQUIRED	NO. OF EXAMPLES REQUIRED	COMPLETED
RESOURCES	Screen capture / report showing a few records in the catalogue with title and barcode and data in as many fields as possible.	5	<input type="checkbox"/>
	A list of several copy barcodes with title (copy barcodes can be scanned from an actual physical item: see the instructions below).	5	<input type="checkbox"/>
BORROWERS	Screen capture / report showing a few records in the system with data in as many fields as possible for each type of borrower. Minimum information displayed should be: <ul style="list-style-type: none"> Barcode Name 	5	<input type="checkbox"/>
	A list of several borrower barcodes, with name (borrower barcodes can be scanned from a borrower card or barcode list: see instructions below).	5	<input type="checkbox"/>
LOANS	Screen capture / report showing the loans for borrowers. Minimum information displayed should be: <ul style="list-style-type: none"> Borrower barcode Resource title Copy barcode Due date 	5	<input type="checkbox"/>
LOANS HISTORY	Screen capture / report showing the loan history for borrowers. Minimum information displayed should be: <ul style="list-style-type: none"> Borrower barcode Resource title Copy barcode Due date Return date 	5	<input type="checkbox"/>

SCREEN CAPTURE INSTRUCTIONS:

Go to the screen you want to 'capture' and press ALT+PRINTSCREEN. Then open Word and press CTRL+V to 'dump' the image into the document. (The PRINTSCREEN key is usually on the top right hand side of your keyboard.) Softlink requests that you enter all screen captures into a single Word document.

BARCODE SCANNING INSTRUCTIONS:

Open the MS Word document in which you are saving the screen captures. Use a **barcode scanner** on the copy/item or borrower card to capture the barcode information in the MS Word document. Barcodes will appear as numeric or alphanumeric representations (2187143401 / TR0008587), not as actual barcodes.



- For copies/items, please enter the title of the resource next to each scanned barcode.
- For borrowers, please enter the borrower name next to each scanned barcode.

Do NOT use a photocopier/scanner to scan an image of the actual barcode.

If different barcode formats are used in the library, please provide examples of **ALL the different barcode formats**. Old and recent item barcodes should be included in the sample.

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