

Textbook Tracker Conversion Guide

Upgrade from v4 to v7

We're so happy you're interested in upgrading to our newest version of Textbook Tracker. Once you upgrade to v7, you cannot go back to v4. So before you make the switch, here are a few things you should know:

- **There is no automatic conversion.** We can only recommend strategies to export patron, title, and copy data, and then import it into your new system.
- **You cannot preserve or migrate everything.** There is no way to preserve or migrate circulation, charges and fines, history, usage, preferences, courses, etc. For these reasons, we recommend converting your collection over the summer or during a time when textbooks are being circulated the least.
- **Not all exported data can be imported.** It is possible to export more information than can be imported, but we don't recommend it. To avoid unforeseen problems, limit the export to suggested fields only.
- **Cover art cannot be transferred.** It is not possible to transfer cover art from v4 because an export for that function does not exist. Textbook Tracker v7's Cover Art Engine does not obtain Cover Art for Textbooks. Users will have to re-create or replace this manually.

For a personalized recommendation on how to convert your current patrons and items from v4 to v7, please contact Textbook Tracker Customer Support at 800-347-4942 or support@textbooktracker.com.

Patrons

Are you an existing Alexandria customer? Patron records are synced between Alexandria and Textbook Tracker v7, so your patron records may already be there. If you're using Textbook Tracker as a stand-alone program, there are other options.

If your school or district's student information system (SIS) is more current than Textbook Tracker's database, it may be best to obtain a fresh patron export from your SIS and then import that to Textbook Tracker. This means you won't be transferring any of your existing Textbook Tracker patron data, but the records will be current.

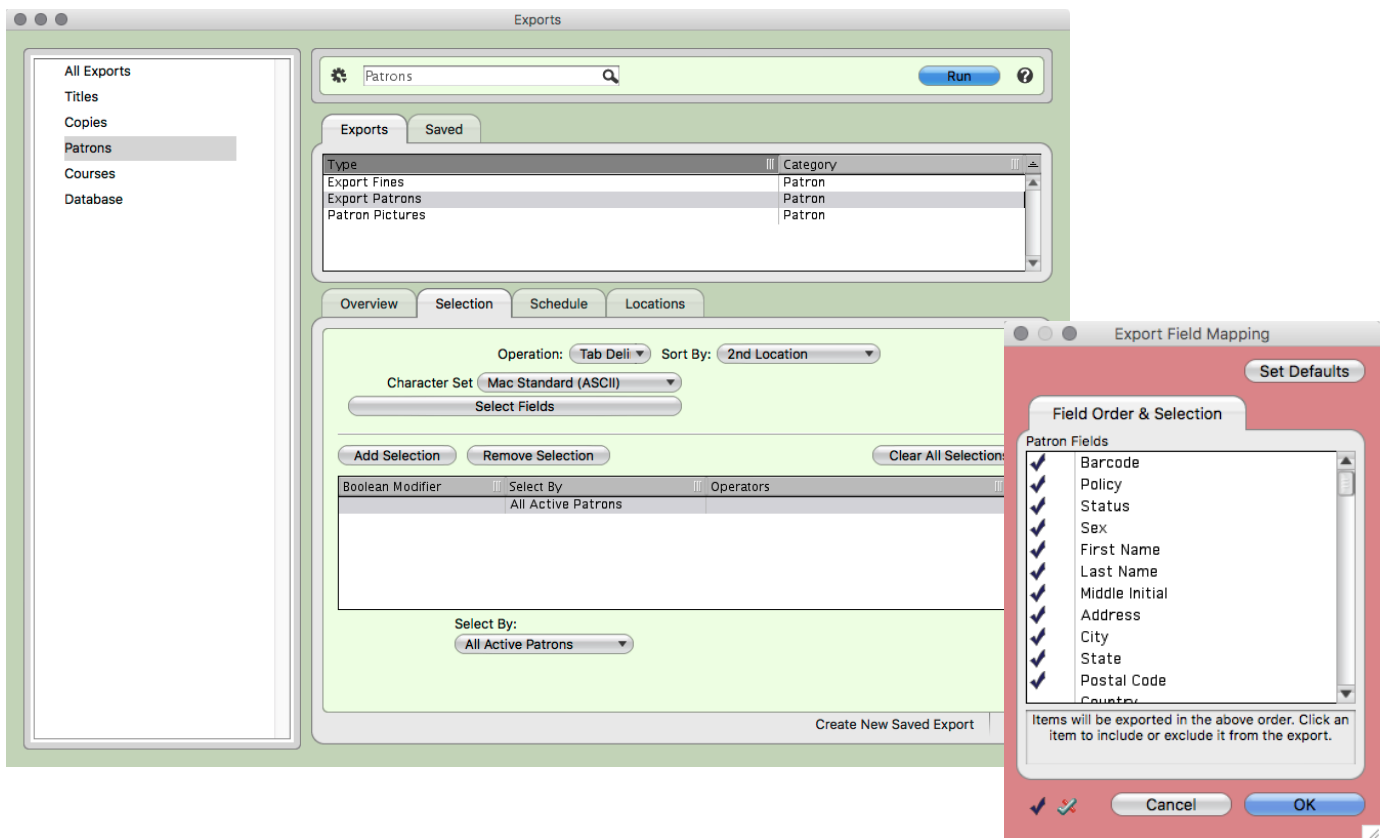
Do you use [SIF](#) with Textbook Tracker? or [Clever](#) with Alexandria? You can repopulate your patron records with one of these tools.

If those suggestions don't fit your situation, follow the steps to export patron records from v4 and import them to v7.

Export

Your library has its own unique requirements that may not be met with our general recommendations. Adjust your settings accordingly.

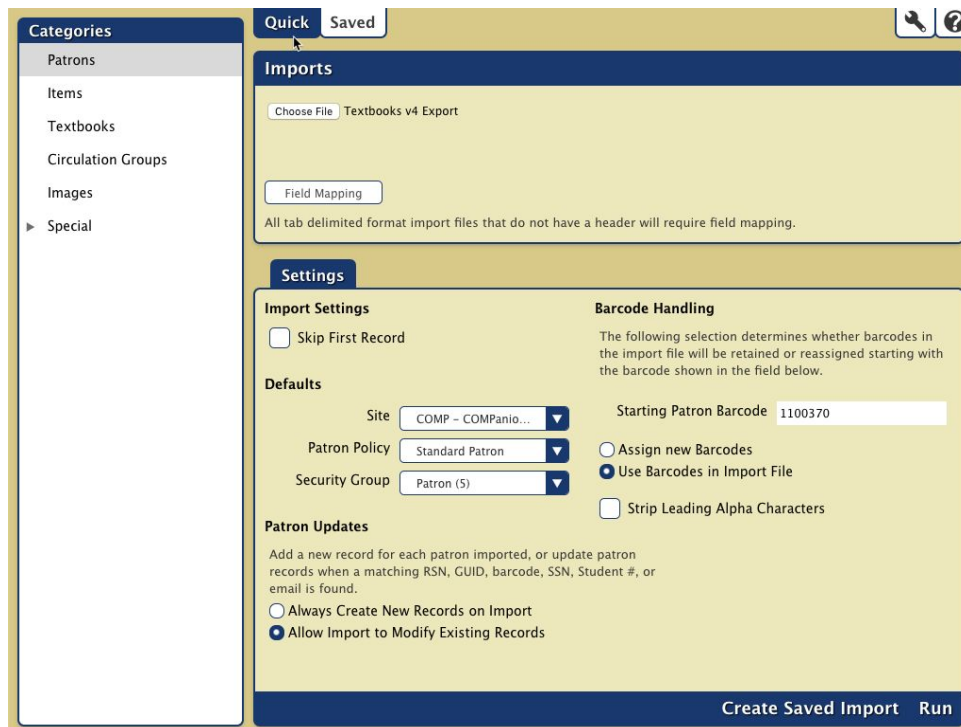
1. Open Textbook Tracker v4, then go to **Tools > Export**.
2. Select the **Patrons** category.
3. In the **Exports** pane to the right, choose **Export Patrons**.
4. In the **Selections** pane below, choose the following settings:
 - **Operation:** Tab Delimited
 - **Select Fields:** This is required. Patron fields will be exported in the order by which they are arranged here. We recommend choosing only relevant fields that are compatible with v7. Refer to Compatible Patron Fields on page 4 for a complete list.
 - **Select By:** All Active Patrons
5. Click **Run**.



Import

If you're already using Alexandria v7, make sure you have a good database archive before you begin.

1. Open Textbook Tracker v7, then go to **Tools > Import**.
2. Under Category, select **Patrons**.
3. In the Imports pane, click **Choose File**. Locate your exported file on your computer, then click **Open**.
4. **Field Mapping** is *not* required. As long as you exported only recommended fields, the header in the v4 export file is compatible with v7, and the fields will be matched properly upon import.
5. In the **Settings** tab, choose the following:
 - **Skip First Record:** Unselected
 - **Defaults:** Adjust as needed based on your unique requirements.
 - **Patron Updates:** Allow Import to Modify Existing Records
 - **Barcode Handling:** Use Barcodes in Import File
 - **Strip Leading Alpha Characters:** Unselected
6. Click **Run**.




Pro Tip: Patron pictures can be transferred if patron barcodes didn't change.

- v4 Export: Tools > Export > Patron Pictures
- v7 Import: Tools > Import > Images > Patron Pictures

Compatible Patron Fields

The following fields, listed in order of how they're presented in Textbook Tracker v4, are compatible with Textbook Tracker v7. When setting up your export, only include fields from this list. All other fields are non-transferrable.

Version 4	Version 7	Notes
Barcode	Barcode	Required for matching.
Policy	Policy	A policy with the same policy short code must exist before import.
Status	Status	
Sex	Sex	
First Name	First Name	
Last Name	Last Name	
Middle Initial	Middle Initial	
Address	Address	
City	City	
State	State	
Postal Code	Postal Code	
Country	Country	
SSN	SSN	Alternate for matching.
Student #	Student #	Alternate for matching.
Homeroom	Homeroom	You may be using custom terminology for this field.
Grade	Grade	You may be using custom terminology for this field.
2nd Location	2nd Location	You may be using custom terminology for this field.
Phone Number	Telephone	
Mobile	Mobile	
Email	Email	
Password	Password	This is the encrypted password (1063). If not included, a new default will be assigned (last name), which can be modified later, as necessary.
Graduation Date	Graduation Date	
Card Exp Date	Card Exp Date	
Birthdate	Date of Birth	
Parent / Guardian	Parent / Guardian	
Contact Notes	Contact Notes	
Categories	Categories	
Alert Notes	Alert Notes	
General Notes	General Notes	
Patron Accession Date	Patron Accession Date	Not recommended unless it's necessary to preserve the patron's original accession date.
Site	Site	A site record with the same site ID code must exist before import.

Textbook Titles & Copies

Title and copy records must be exported from v4 and imported into v7. We recommend exporting them as a single tab-delimited file with the Title Call Number field (mapped to Title ID) and ISBN for matching.

The Title ID field in v7 is similar to the Title Call Number field in v4, which you may not be using. To avoid unintended title merging during the import to v7, take the time now to give each title a unique ID in the Title Call Number field, and then map it to the Title ID field in v7. If this isn't practical, v7 can match records by ISBN only, but this method is less reliable because ISBNs are not required to be unique. It's better to include both.

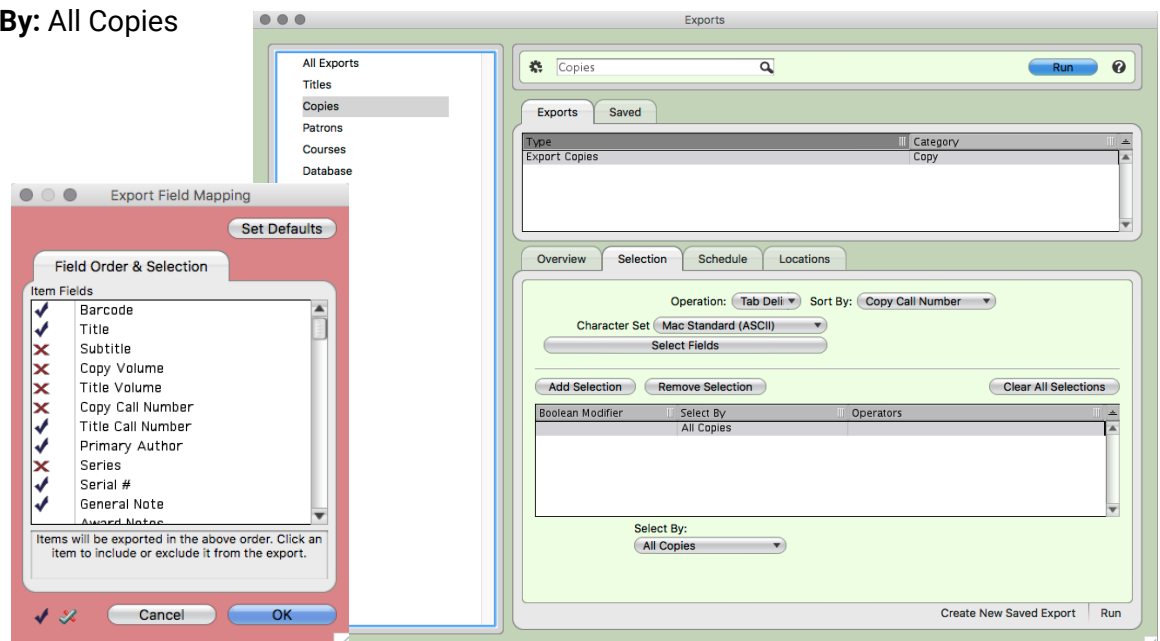
When the file is imported, Textbook Tracker will add a new title and copy for any new Title ID and ISBN, and it will update the title and add a copy for any existing Title ID and ISBN.

Export

Your library has its own unique requirements that may not be met with our general recommendations. Adjust your settings accordingly.

1. Open Textbook Tracker v4, then go to **Tools > Export**.
2. Select the **Copies** category.
3. In the **Exports** pane to the right, choose **Export Copies**.
4. In the **Selection** pane below, choose the following settings:
 - **Operation:** Tab Delimited
 - **Select Fields:** This is required. Items will be exported in the order in which they are arranged here. We recommend choosing relevant fields that are compatible with v7, only. Refer to Compatible Title & Copy Fields on page 7 for a complete list.
 - **Select By:** All Copies

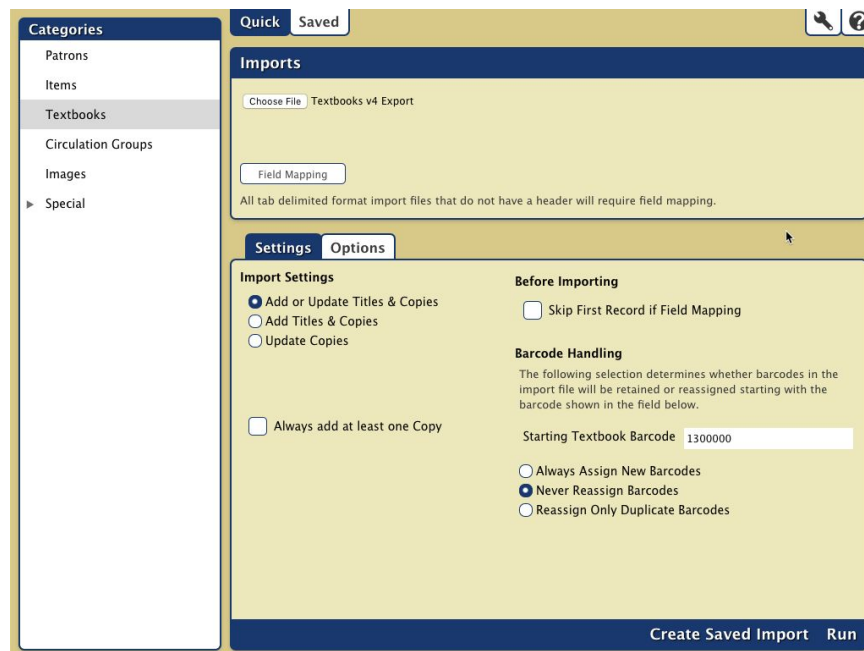
5. Click **Run**.



Import

Textbook Tracker v7 uses different field codes than v4, so the fields will not automatically match on import. For this reason, you must remove the header on the v4 export. Open the export file in a plain text editor, and then remove the first line beginning with **###***. Then use Field Mapping to match the v4 fields to v7 fields.

1. Open Textbook Tracker v7, then go to **Tools > Import**.
2. Select the **Textbooks** category.
3. In the **Imports** pane, click **Choose File**. Locate the export file on your computer, then click **Open**.
4. **Field Mapping** is *required*. We recommend matching fields based on the Compatible Title & Copy Fields list on page 7.
5. In the **Settings** tab, choose the following:
 - **Import Settings:** Add or Update Titles & Copies
 - **Always Add At Least One Copy:** Not selected
 - **Skip First Record if Field Mapping:** Not selected
 - **Barcode Handling:** Never Reassign Barcodes
6. In the **Options** tab, leave the default settings or make adjustments based on your unique requirements.
7. Click **Run**.



Pro Tip



A savvy user can combine tab-delimited fields and then map the information to a single v7 field. For example, the export could be arranged so the Title, Remainder of Title, and Statement of Responsibility fields are next to each other. Then the tabs between them could be replaced with spaces to create a single “column” with all three component that could then be mapped to Title.

Compatible Title & Copy Fields

The following fields, in order of how they're presented in Textbook Tracker v4, are compatible with Textbook Tracker v7. When setting up your export, only include fields from this list. All other fields are non-transferrable.

Fields in v4 cannot be matched to fields in v7 automatically, so Field Mapping is required. We recommend matching these field pairs for best results. If you need the data from a v4 field that does not have a v7 equivalent, you can map it to General Note or Copy Note to preserve for historical reference.

Column in v4	Column in v7	Notes
Barcode	Barcode	
Title or Full Title	Title	v7 does not have a field for subtitle. If you have data in this v4 field, export the Title:Subtitle field and map it to the v7 Title field for import.
Title Call Number	Title ID	Required for matching. See also ISBN/ISSN.
Primary Author	Author	
Serial #	Serial #	
General Note	General Note	
Edition	Edition	
ISBN	ISBN/ISSN	Alternate field for matching. See also Title ID.
Copy Location	Copy Location	You may be using custom terminology for this field.
Copy Shelving	Copy Shelving	You may be using custom terminology for this field.
Vendor	Vendor	
Publisher	Publisher	
Publication Year	Publication Year	
Copy Notes	Copy Notes	
Extent	Extent	
Inventory Date	Copy Inventory Date	
Accession Date	Copy Accession Date	
Replacement Cost	Replacement Cost	
Purchase Cost	Purchase Cost	
Current Policy	Title Policy	v7 cannot import the Current Policy field from v4, so we recommend mapping it to the Title Policy field. Relevant policies with matching policy short codes must exist in v7 prior to import.
Copy Condition	Copy Condition	Relevant condition codes must exist in v7 prior to import.
Funding Source	Funding Source	
Site	Site	
Full Title	See Title	
Stock	Stock #	
Dist. Adopt Start	District Adoption Date	
State Adopt Start	State Adoption Date	