



# One-Step Data Migration Process & Guidelines

Artlogic has over 25 years of experience in helping art professionals migrate their data onto its platform with secure data import processes. Our one-step data migration will conduct your import rapidly, with as little disruption to your team as possible and with only one batch of exported data.

## **TIMELINE: 1 month**

Following the confirmation of your subscription, we will request a full export of your dataset. Upon receipt,

1. Artlogic sets up your account and begins single-step import (10 business days)
2. You verify data migration providing our team with feedback (5 business days)
3. Artlogic resolves the collected feedback (5 business days)
4. The data migration is complete and you are live in Artlogic

## **IMPORTANT TERMS**

- **Single Import** - You will only need to export and send your data once. We will import this alone.
- **Subscription** - Your Artlogic subscription begins on the date your login details are delivered.
- **Feedback** - A maximum of 5 business days to check the data and submit examples for anything that needs resolving.
- **Post-Import** - The point at which you go live. We cannot continue to add to or edit your data once you go live.
- **Monday.com** - The interactive project-management software you will use to submit feedback and communicate with our team.



**Eligible software:**

- **ArtBase** (v8, v10, v11, v12)
- **GalleryManager**
- **ArtSystems\***
- **ArtBinder**
- **ArtButler**
- **NIL**
- **Tango**
- **Artlook**

We have successfully transferred numerous clients, both large and small, from the above systems to Artlogic. Below you will find a detailed explanation of exactly how the process works.

**\*Transfers from ArtSystems:**

ArtSystems often requires around 3-4 months lead time before providing you with an export of your data. Therefore, once you are confident that you wish to transition to Artlogic, you must contact ArtSystems as soon as possible to request your data export and minimise the delay.

## Your Artlogic Import team

Our import developers are all based in the UK whilst our Sales and Client Liaison teams are spread between our UK and US offices. If you are based in the US, we will always assign at least one US team member to your data transfer project. You will be introduced to your import team at the very beginning of the import project.

Your Artlogic team will be made up of the following team members:

- **Your Project Manager** – An experienced database specialist from our Client Liaison team will be your primary point of contact throughout the import process.
- **Your Import Developer** – One of our import developers (all based in the UK). Whilst most communication will go directly through your Project Manager, direct communication with your Import Developer will be available via our project management systems.

What we require from you:

- **A full export of your current data** – including all relevant images and documents.
- **A week's worth of dedicated focus** – to avoid any downtime between your old and new systems, this project requires swift and dedicated focus during the feedback process.
- **A primary point of contact** – You will need to assign a single member of your team as our primary point of contact. This should be the person most intimately familiar with your current data, as it will be their responsibility to spot any potential anomalies in the imported data. A single point of contact ensures we can manage your import as quickly and efficiently as possible.
  - **Smaller organisations** – Up to two people should be sufficient to check through the data import.
  - **Larger organisations** – If your organisation has various departments, the primary point of contact will need to both check data themselves, and help to filter feedback from other members of the team. Select

representatives from each department to provide targeted data checks for the areas of the database they are most familiar with. If your organisations work across multiple locations (especially internationally) then we strongly encourage you to select a representative from each of your remote locations to provide location-specific feedback to the primary point of contact.

## How the process works

**During the data transfer process, you should NOT use your Artlogic account to upload any new records or edit imported records.** Every time we perform an update to resolve your feedback, the entire data set will be re-imported, so any changes you make will not be saved. Manual edits and new data entry can only begin once you go live.

- **Data Export** – You will first need to perform an export of all data you wish to include. The export of your data will be performed by your software provider, yourself or our programmers, depending on the software you are coming from. We will send you tailored guidelines specific to your software. You are responsible for requesting a data export from your software provider. We will not ever communicate with third-party developers directly unless there is a technical question that we need to help with.

**Once you have performed your data export, it is vital that you keep track of ANY AND ALL changes you continue to make in your old system. These will need to be manually added to your Artlogic database once you go live.**

- **Scheduling** – Your project will be scheduled with our teams upon receipt of your initial payment, set up information, and data export.
- **Data Import** – Upon receipt of your data export, your Import Developer will begin to import your data to your new Artlogic database. We have incredibly efficient import scripts, informed by our decades of experience in transferring data from eligible software. These allow our developers to import your data

within 10 business days. We will always endeavour to deliver your import as rapidly as possible.

- **Setting up your Artlogic database Database Delivery** – Your database login will be delivered to your primary contact once the system is populated with your data. In preparation for your data transfer, your Project Manager will set up your Artlogic Database so that it is ready well in advance of us receiving your exported data. However, we will wait to deliver your database for checking until it is populated with your data.
- **Introductory Call** – Once the import is complete, we will arrange a brief training to familiarise you with both the Artlogic database and the feedback process.
- **Focused & high speed feedback phase** – This phase of the project will last 5 business days maximum. Your team will be responsible for conducting an efficient check of all imported data. Because we will only import your data once, any data entry after the export will NOT be updated in Artlogic when you go live. A short feedback phase will minimise the amount of “downtime” between the two systems.

As you and your team begin checking the data import, please provide feedback on anything that is incorrect, missing or simply in the wrong location. We do not expect that your data import will be 100% correct at this stage, though the level of accuracy should generally be very high. As you provide feedback we will adjust and refine your data import until all the necessary corrections are complete. Each time we make corrections to your data we will inform you accordingly so that you can review the updates. We use a project management software called ‘monday.com’ to efficiently track and resolve your feedback. Please see below for further information on how best to check through your imported data. It is **your responsibility** to check through the imported data. Whilst we will suggest methods for how best to check and cross-reference your data, we cannot check for accuracies.

- **Going Live** – Once you and your team are happy with the feedback phase (within the one-week feedback period) your database will become live for use and no further changes will be made. It is crucial that you thoroughly check your data before you begin to use the new system, as our import developers cannot perform further updates without wiping out changes made by your team. In the event that you need to extend your post-import feedback period or perform an additional data import with fresh data, additional fees will be incurred and the extended project will need to be scheduled with our teams.
- **Training** – One-to-One training is not included. We have a wealth of self-training resources, including articles, videos and webinars available for your team on our Help website ([support.artlogic.net](http://support.artlogic.net)). One-to-One training sessions can also be booked in advance with our Client Liaison team for £100/hour / \$130/hour plus applicable taxes.
- **Cleaning your data is not part of your import** – Checking the data import will naturally reveal pre-existing inaccuracies and anomalies in your data. It is NOT Artlogic's responsibility to clean this data. We are committed to accurately transfer your data from your old database to Artlogic. Any previous inaccuracies will be included in this transfer, and it will be your responsibility to resolve these once your new database is live.

**IMPORTANT:** Invoices are NOT imported but sales data and invoices PDFs are - We do not ever import invoice records or accounts records into the Artlogic database. Rest assured, invoices PDFs will be imported as attachments (if provided in the exported data) and vital sales information is transferred into both artwork records and contact records and will be available to search, view and export from those sections of the database. This is due to the complexity of the data structure and the differences in how invoice calculations are made from one company to the next.

## How to check your data

**It is your responsibility to check through the imported data both methodically and thoroughly.** We do not expect you to cross-reference every single record (that would be near impossible) but looking through specific artworks and contact scenarios that are familiar to you and your team will allow you to unearth any problems that have occurred during the data transfer.

To efficiently manage and track progress during your data import we use a project management software called **Monday.com**. You will be invited to a private Monday board by your Artlogic Project Manager, who will walk you through how to submit feedback in your introductory call. Monday is an interactive space within which you can directly communicate with both your Project Manager and your Import Developer. All feedback must be logged here, and will be actively updated by our team as we resolve any issues. Please refrain from sending feedback via email.

Before you begin to check through your data, your Project Manager will arrange a screen share meeting to show you how to navigate your Artlogic account. In this session, they will illustrate the best methods to check your data within each section of the database. This meeting is not a full training session, and we will not focus on new features for use after going live.

Below are some guidelines for checking data:

- **What we need from you** – When submitting feedback on your imported data please provide us with as much relevant information as possible about the issue you are reporting, with specific reference to the affected records:
  - **For Artworks:** Stock Number
  - **For Contacts:** First Name, Last Name, Company, Email Address
  - **Screenshots** are very helpful to indicate where and how data is logged in your old system, and where you would like to place it within Artlogic.

- **Status & Availability Map (S&A map)** – Checking and confirming the correct Status & Availabilities is crucial to a successful transfer of data. This should be the first area of focus once we deliver your imported database. We will provide you with a Status & Availability map which will list all variations of status and availability (S&A) from your previous system. Other database solutions often provide huge flexibility when it comes to editing S&A, resulting in hundreds of variations. The goal is to match up your past S&As with our predefined lists of S&As in Artlogic. Within the S&A map, we will provide suggestions for which combinations seem best suited for each scenario. These suggestions should help you begin the process, but **you are responsible for checking this data**, as only your team will be familiar with the intricacies of your system. The S&A map **MUST** be completed by you and your team as early in the feedback phase as possible so that we can make the necessary adjustments to the data import. Incorrect S&As are very distracting when checking artworks, hence why this should be your initial focus.
- **Tips for checking through contacts** – Check through records in regularly used contact categories or marketing event lists that are particularly recent and familiar to you. Ideally these groups will contain contacts that are commonly edited, which will help to unearth any potential discrepancies. Additionally, checking through highly active collector contact records that contain a lot of purchases will quickly highlight any issues in the data transfer.
- **Tips for checking through artworks** – Select artwork lists (or artwork groups) from past art fairs or recent exhibitions as these will present works that you are very familiar with and will generally display a variety of different statuses for you to check. Check through artworks that are stored in specific locations. Try to select artworks that are particularly complex in areas such as: financial data, location data, condition, shipping etc.
- **Checking frequently run searches** – Run searches in Artlogic that you often perform in your current system. Use these searches to cross-reference results between the systems.

- **Other database sections for checking data** – We may import data into the following areas in Artlogic that should all be checked: activity timeline, marketing & event lists, artwork lists and artwork offers. Please check records in all of these areas of the database.

\* **What does Status & Availability mean?** – This relates specifically to artwork records and their current state from a sales perspective. Statuses in Artlogic include: **Stock** (owned by you) **On Consignment** (consigned to you), **Ex-Inventory** (no longer in your inventory i.e. sold), **3rd Party** (works that you know about but aren't officially owned by you or consigned by you). Examples of availabilities in Artlogic include: **Available, Consigned Out, On Loan, Reserved, Damaged, Sold, Not For Sale** etc. Once imported to Artlogic, each record must have a combination of one Status and one Availability.