

How To Bulk Update Assets Using CSV

When you want to update several research assets at once, you may prefer to work using Excel to edit selected fields. This can be done by exporting and then importing a CSV file.

The steps of the process are:

1. Create a set of the assets you want to update
2. Run a job to export selected fields as a CSV file
3. Import the CSV file into Excel in the correct format
4. Make your changes to the file
5. Import the CSV back into Esploro

As an example, let's say that we want to add DOIs to journal articles that don't have one.

First, create a set of the assets we plan to update. There are a few ways to make a set, which you can learn about in this session of Esploro Essentials. In this case, we will run an advanced search for Research assets where Asset type Equals Journal article and DOI Is Empty. Click Save Query. Give the set a name and Save.

Then, Export the CSV file. From the Admin menu, Select Run a Job. Select the job Research assets CSV export. Select the set. You don't need to change these fields. Full export will export all the fields and columns. Selective export allows you to select the relevant fields only. For our example, let's choose everything in the Asset Titles section, as well as DOI. The Asset ID is always included. Some fields cannot be updated using CSV import, such as files, grants, and creators. Click Next. Check the information and click Submit. Open the History tab. Click on the name to open the job report. Click the Link to Exported records. Click the name to download the CSV file.

Now, we can make our changes to the file, but don't open the CSV in Excel! This would mess-up the MMS ID. Instead, open a new spreadsheet in Excel and open the Data menu. Click From Text/CSV. Select the file you downloaded and click Import. For File Origin, choose Unicode (UTF-8). Then click Transform Data. Select the column Research_Asset_ID and change the data type to Text. Click Replace current. Click Close and Load.

Update the fields that you wish to change. Deleting the contents of any cell will delete the value from the Esploro asset. Don't delete the Asset ID, or else the update will not work. Under Table Design, select Convert to range. Delete the A1 cell value. (This was added automatically by Excel to avoid blank table headings.) Save the file as a CSV.

Now, we can import the CSV back into Esploro. In the Repository menu, select Manage Import Profiles. If you already have an import profile for updates to research assets, you will see it here. This is different from the import profile you would use to add new research assets. If you don't have a profile specifically for updating research assets, then click Add New Profile. You will see Research Assets – Used for loading research assets. Click Next. Give your profile a name. Originating system is Esploro. Import protocol is Upload File/s. Physical source format is CSV. Import mode is important. In this case, we want to Update existing assets, not Create new ones. Status should be Active. Click Next, and Next again, and Save. Finally, use the row actions menu to Run the import profile. Select the File, which is the edited CSV file that you saved. You can add a Label or Notes if you want. Click Add. Click Submit. Refresh the page to see if the job has finished. When it has completed, open the row actions menu and click Report. Here we can see that all the records have been imported. Expand Assets Imported to see more details. Overlaid records means that existing assets were updated. If there are any errors, you will be able to see them here, under Records with warnings > View errors.

That's How To Bulk Update Assets Using CSV.