Importing records

There are three ways of importing data into the Soutron system:

1. importing individual catalogue records from external sources such as Google, Library of Congress and COPAC - see separate section
2. importing files of multiple records in XML or CSV format (catalogue or borrower records)
3. importing documents

This section describes options 2 and 3, which are managed in Import Maintenance: this is where you define how a file of records or documents is to be processed, in order to import that data into Soutron. For a given data source, an import profile only needs to be set up once and used as many times as needed.

There are three parts to importing files and documents:

1. setting up the import profile - this defines which fields are imported from the source file and how they map to the fields in Soutron
2. setting up an email notification for when the import is finished
3. setting up the task and schedule to manage and run the imports
4. running the import - files can be imported on a one-off or regular basis

The Import Maintenance screen also allows you to:

- edit an import profile
- delete an import profile
- run the import directly from the import screen, instead of using the Task Centre

Points to note

The following should be noted:

- the importer does not currently allow importing of copy information
- a file of records for importing must all be of the same Content and Record Type
- a file of records can be imported either as new records or replace existing records, but not at the same time
- you cannot import into system date fields - Created Date and Last Edited Date
- the import will not work if the Soutron Task Service is not running
- the complete record will not be imported if data in the following field types is not in the correct format: dates, ISBN, ISSN