Automating Workflow: From a Trickle to a Stream

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Automating Workflow: From a Trickle to a Stream

Digital Commons+ Great Lakes User Group Annual Meeting
July 31 – August 1, 2014
Barbara Strauss and Marsha Miles
How do you encourage librarians to claim ownership in your institutional repository?

• New repositories need to build infrastructure to build the repository
• Building a repository is not a one person act
• Every campus is different with different players and different challenges
• Hope to show you how we are managing our players and automating workflows to provide support
Context at CSU

- CSU is a university with Colleges, including disciplinary departments.
- Subject librarians are assigned to work with academic departments.
- Other librarians with functional roles also are assigned to academic units.
- Librarians provide the primary outreach role between the faculty and the Library.
Subject Librarians

- KickStart from bepress populated EngagedScholarship
- KickStart follow up added more documents
- Director made assignments & individual librarians took initiatives with faculty
- ES staff added interesting projects to give variety
- Identified the need for a streamlined batch process
- Reviewing the riches from the bepress Environmental Scan to get more focused on the assets in the academic environment.
Subject Librarians

- Librarians will be asked to look in depth at their academic departments to identify research centers, programs (undergraduate and graduate), honors or capstone programs and their needs to expose work.
- Prepare a proposal for bringing a department into IR.
- Work with ES staff to develop a workplan for implementation.
EngagedScholarship has the support of the Provost
• Presentations given: Provost’s Council, College Deans, Department faculties, individual faculty
• Faculty workshops offered on open access, author’s rights, creative commons, general copyright
• Librarians work with faculty members to add their works
• Librarians/staff do the retro work for the faculty
• Exploring how to capture scholarship going forward -- FAAR
Workflow

• Clear path to follow
• Flexible for participants
• Include automated processes
Overview

Start Pre-Plan Collection

Collect PDFs from Faculty

Collect Faculty CVs

Find Articles

Process PDFs

Enter Metadata

Batch Upload to Digital Commons

Set Up Filters
Pre-Plan Collection

Browse the *Maxine Goodman Levin College of Urban Affairs* Collections:

- Browse by Research Center
- City Management
- Community Development
- Economic Development
- Energy Policy
- Environmental Policy and Management
- Health Policy and Management
- Nonprofit Management
- Public Financial Management and Budgeting
- Public Management and Administration
- Urban Affairs Books
- Urban Planning
- Urban Policy
- Urban Publications
Collecting and Finding Articles

• PDFs from faculty
• Finding articles from faculty CVs
• Capture relevant metadata
  – RefWorks citation export
  – Additional information found while collecting PDFs and citations
Process PDFs

• Scan, re-typset, prepare files, brand documents as prepared by MSL Academic Endeavors (as needed)

• Original and processed PDFs are retained

• Subject Librarian will determine which version can be uploaded
Subject Specific and Rights Metadata

• Disciplines
• Keywords (pre-selected topics)
• Version
• Publisher’s statement
• Embargo date
• Peer reviewed (yes/no)
Enter Article Metadata

• Enter remaining metadata

• Run Excel macro to fill in custom citation
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    fieldname = Trim(CStr(Cells(1, a).Value))
    If fieldname = "title" Then TitleColumn = a
    If fieldname = "publication date" Then YearColumn = a
    If fieldname = "source_publication" Then JournalColumn = a
    If fieldname = "volnum" Then VolumeColumn = a
    If fieldname = "issnum" Then IssueColumn = a
    If fieldname = "fpage" Then FirstPageColumn = a
    If fieldname = "lpage" Then LastPageColumn = a
    If fieldname = "doi" Then DOIColumn = a
    If fieldname = "custom_citation" Then CitationColumn = a
    If InStr(fieldname, "author1") > 0 And InStr(fieldname, "fname") > 0 Then
        Author1FirstNameColumn = a
        If Author1FirstNameColumn < AuthorColumnsStart Then AuthorColumnsStart = Author1FirstNameColumn
    End If
    If InStr(fieldname, "author1") > 0 And InStr(fieldname, "mname") > 0 Then
        Author1MiddleNameColumn = a
        If Author1MiddleNameColumn < AuthorColumnsStart Then AuthorColumnsStart = Author1MiddleNameColumn
    End If
    If InStr(fieldname, "author1") > 0 And InStr(fieldname, "lname") > 0 Then
        Author1LastNameColumn = a
        If Author1LastNameColumn < AuthorColumnsStart Then AuthorColumnsStart = Author1LastNameColumn
    End If
    If InStr(fieldname, "author2") > 0 And InStr(fieldname, "fname") > 0 Then Author2FirstNameColumn = a
    If InStr(fieldname, "author2") > 0 And InStr(fieldname, "mname") > 0 Then Author2MiddleNameColumn = a
    If InStr(fieldname, "author2") > 0 And InStr(fieldname, "lname") > 0 Then Author2LastNameColumn = a
Next
Prep for Upload

- Google Apps Script to capture fulltext URLs
  - Bepress customization: filename field
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Batch Upload

• Resolve errors
  – Spaces in filenames
  – .xlsx extension

Department_LastName_FirstWordTitle.pdf
example: Acc_Fuglister_Analysis.pdf
Welcome

This research guide gathers resources that you may want to consult while working in CSU’s institutional repository, EngagedScholarship@CSU.

Comments (0)

Terminology

bepress: Founded by professors in 1999, bepress exists to serve academia. They deliver scholarly communications and publishing services for academic institutions, empowering their communities to showcase and share their works for maximum impact. Through services bepress seeks to link communities of scholars, listen to their needs, and provide solutions to support emerging academic missions and goals.

copyright: is a legal concept, enacted by most governments, giving the creator of an original work exclusive rights to it, usually for a limited time. Generally, it is "the right to copy." But also gives the copyright holder the right to control the work. To determine who may adapt the work to other forms, who may perform the work, who may financially benefit from it, and other related rights. It is an intellectual property form (like the patent, the trademark, and the trade secret) applicable to any expressible form of an idea or information that is substantive and discrete.

Digital Commons: bepress pioneered Digital Commons, a software service that is now the leading hosted institutional repository (IR). Digital Commons serves institutional needs by showcasing the breadth of scholarship produced at an institution—everything from faculty papers to student projects, annual reports, and community partnerships.

EngagedScholarship@CSU: Cleveland State’s Implementation of Digital Commons.
Challenges Moving Forward

- Meet the needs of the colleges
- Encourage campus units to take ownership/independence
- Attain sustainability with competing priorities
- Increase librarian participation
- Provide appropriate support, so that librarians can focus on subject specific tasks and faculty
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