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
Common Challenge

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
EngagedScholarship @ CSU

Drive

Google

My Drive
Shared with Me
Starred
Recent
Trash
More

CREATE

Install Drive for your computer

EngagedScholarship -- Business

My Drive ▶ CSU ▶ EngagedScholarship -- Business

- Business CVs
- Citations
- PDFs to Process
- Processed PDFs
- Upload Prep
- Accounting_Notes
- Books -- bus_facpubs
- bus_facpub
- disciplines.pdf
- Document Types
- ES_workflow
- metadata_notes
- topics
Overview

1. Start Pre-Plan Collection
2. Collect PDFs from Faculty
3. Collect Faculty CVs
4. Find Articles
5. Process PDFs
6. Enter Metadata
7. Batch Upload to Digital Commons
8. Set Up Filters

(arrange by college, department, topics, etc.)
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
'DETERMINE WHICH COLUMN MATCHES EACH FIELD NAME

'NOTE: if you get error box when running macro, replace
'fields names below with correct field names used in spreadsheet

For a = NumColumns To 1 Step -1
    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, "lname") > 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
<table>
<thead>
<tr>
<th>A</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

**fulltext URLs**

File | Edit | View | Insert | Format | Data | Tools | Help | Get URLs | All change | Run Script

-$|\%|123$ | Arial | 10 |
<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td>15thDefenseElmerWBrown.jpg</td>
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</tr>
<tr>
<td>FishermansShackFredCarlo.jpg</td>
<td><a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FishermansShackFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FishermansShackFredCarlo.jpg</a></td>
</tr>
<tr>
<td>FrostedRoofTopsFredCarlo.jpg</td>
<td><a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FrostedRoofTopsFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FrostedRoofTopsFredCarlo.jpg</a></td>
</tr>
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<td><a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LittleGirlWithHoodFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LittleGirlWithHoodFredCarlo.jpg</a></td>
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<tr>
<td>MaybeTomorrow850WilliamESmith.jpg</td>
<td><a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/MaybeTomorrow850WilliamESmith.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/MaybeTomorrow850WilliamESmith.jpg</a></td>
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<tr>
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</tr>
</tbody>
</table>
Batch Upload

- Resolve errors
  - Spaces in filenames
  - .xlsx extension

example: Acc_Fuglister_Analysis.pdf
Working with EngagedScholarship@CSU

This research guide gathers resources that are useful for work in EngagedScholarship@CSU.

Last Updated: Jul 24, 2014
URL: http://researchguides.csuchico.edu/EngagedScholarship

E-Publishing at MSL

Documents that summarize the benefits of using this service and other e-publishing programs at the Library.

Welcome

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

Get Inspired

How to Fill Your Institutional Repository. 50 Practical Lessons I Learned by Doing by Paul Rosyster

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, enunciated 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 places the copyright holder the right to be mortified for 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.

Engaged Scholarship@CSU: Cleveland State University’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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