

7-31-2014

## Automating Workflow: From a Trickle to a Stream

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### Repository Citation

Strauss, Barbara and Miles, Marsha, "Automating Workflow: From a Trickle to a Stream" (2014). *Michael Schwartz Library Publications*. 105.

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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



## Faculty



- 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





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Google

Drive



EngagedScholarship -- Busi...

CREATE



My Drive

Shared with Me

Starred

Recent

Trash

More ▾



Install Drive for your  
computer

My Drive ▸ CSU ▸ EngagedScholarship -- Business



TITLE



Business CVs Shared



Citations Shared



PDFs to Process Shared



Processed PDFs Shared



Upload Prep Shared



Accounting\_Notes Shared



Books -- bus\_facbks Shared



bus\_facpub Shared



disciplines.pdf Shared



Document Types Shared



ES\_workflow Shared

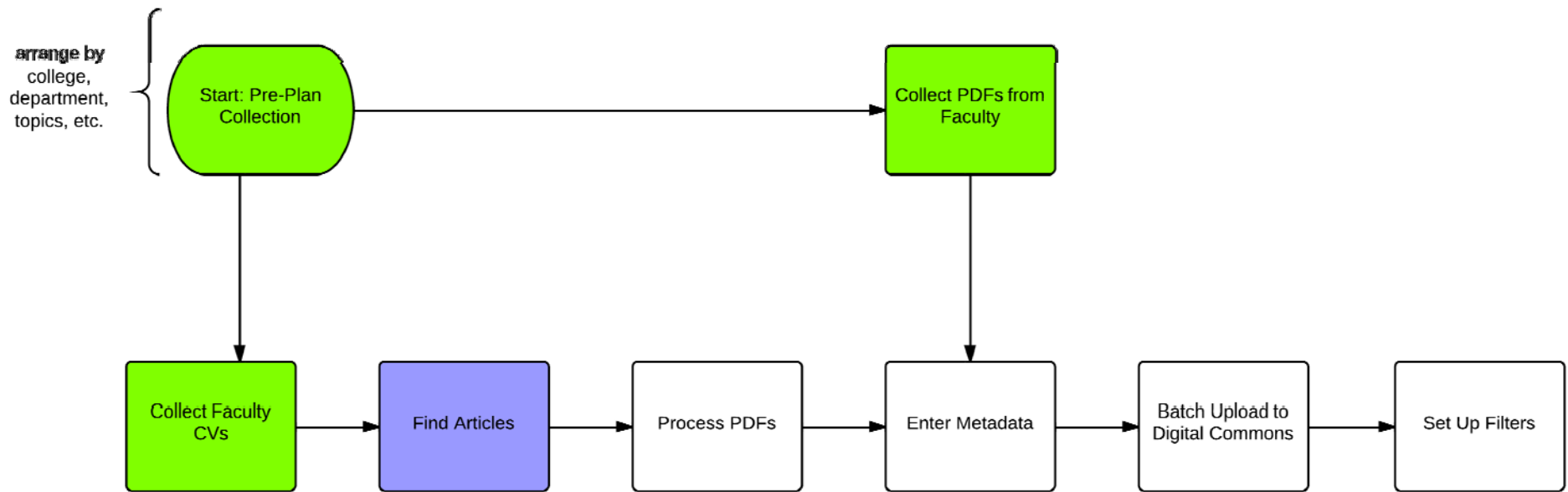


metadata\_notes Shared

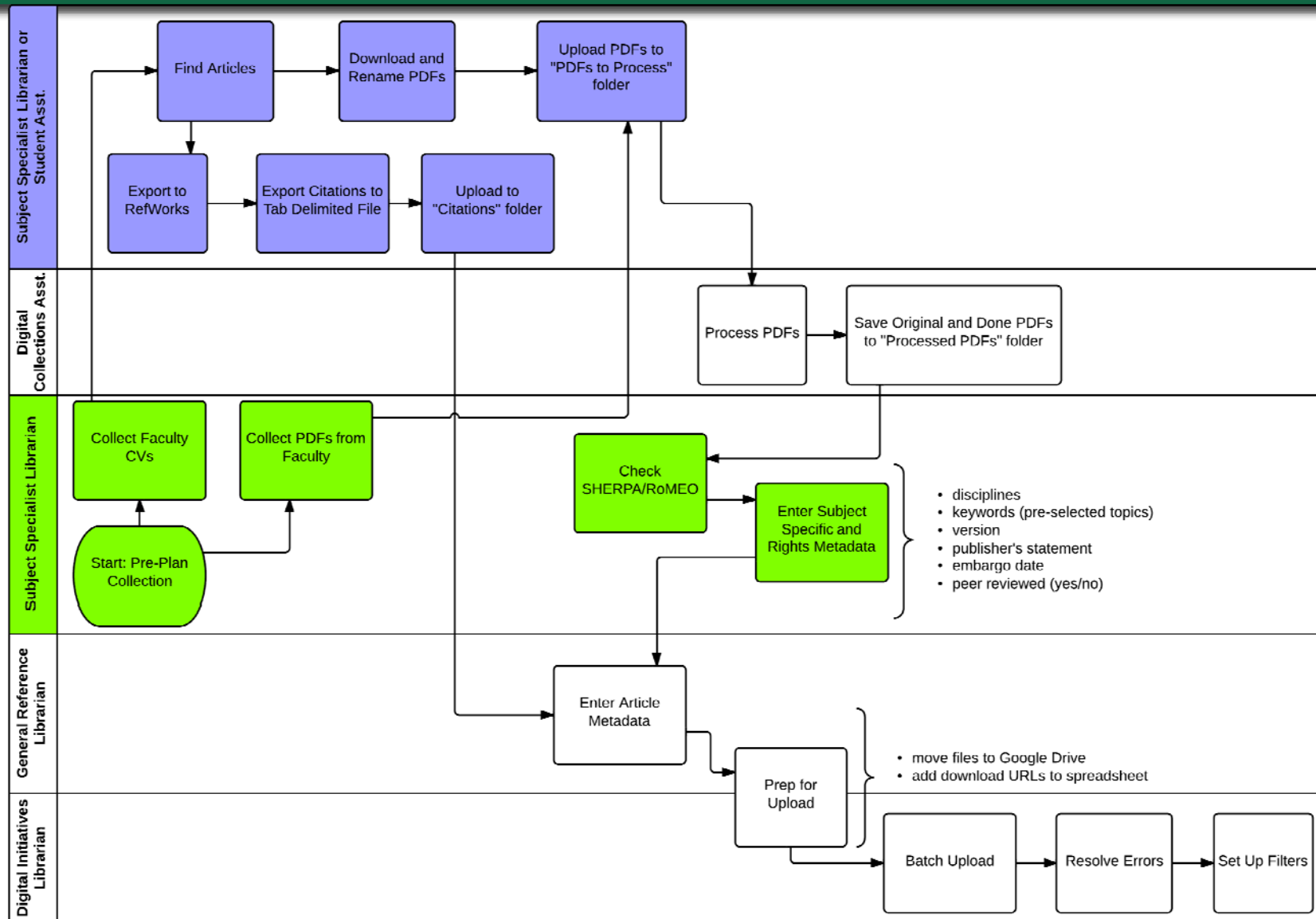


topics Shared

## Overview



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# 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](#)



*Maxine Goodman Levin*  
*College of Urban Affairs*

# 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

```
Book1 - Module1 (Code)
[General]
MarshaCitationMacro

Sub MarshaCitationMacro ()
'
' MarshaCitationMacro Macro
' by Jeff Beuck
' v. 2.0 -- gets column positions by looking at field names so macro can
' still run if fields are rearranged

Dim a As Long
Dim NumColumns As Integer
Dim NumRecords As Long
Dim CitationStr As String
Dim CitYear As String
Dim CitTitle As String
Dim CitJournal As String
Dim CitVolume As String
Dim CitIssue As String
Dim CitFirstPage As String
Dim CitLastPage As String
Dim CitDOI As String
Dim CitLastName(12) As String
Dim CitFirstInitial(12) As String
Dim CitMiddleInitial(12) As String
Dim ColOffset As Integer
Dim NextNameExists As Boolean
Dim TitleColumn As Integer
Dim YearColumn As Integer
Dim JournalColumn As Integer
Dim VolumeColumn As Integer
Dim IssueColumn As Integer
Dim FirstPageColumn As Integer
Dim LastPageColumn As Integer
Dim DOIColumn As Integer
Dim CitationColumn As Integer
```



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```
'*****
'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, "mname") > 0 Then Author2MiddleNameColumn = a
    If InStr(fieldname, "author2") > 0 And InStr(fieldname, "lname") > 0 Then Author2LastNameColumn = a
Next
```

## Prep for Upload



**Dropbox**

VS.



Google Drive

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

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Google

Drive



Upload Prep

CREATE



- My Drive
- Shared with Me
- Starred
- Recent
- Trash
- More ▾



Install Drive for your  
computer

My Drive ▸ CSU ▸ Upload Prep



TITLE



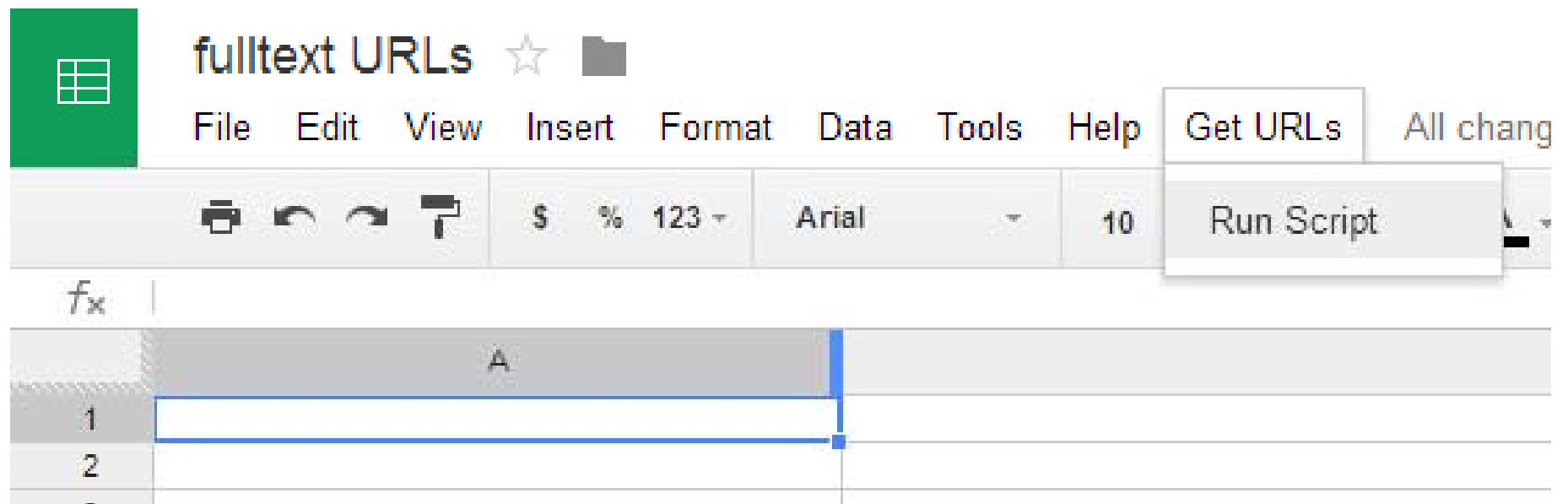
PDFs to Upload Shared



fulltext URLs Shared



Upload\_URLs\_instructions.pdf Shared



The screenshot shows a web application interface for a tool named "fulltext URLs". The interface includes a green icon with a grid pattern, a title bar with a star and folder icon, and a menu bar with options: File, Edit, View, Insert, Format, Data, Tools, Help, Get URLs, and All changes. Below the menu bar is a toolbar with icons for print, undo, redo, and a formula icon, followed by a currency symbol (\$), a percentage sign (%), a number (123), a font family (Arial), and a font size (10). A dropdown menu is open under the "Get URLs" menu item, showing the option "Run Script". The main area displays a table with a header row labeled "fx" and a column labeled "A". The table has three rows, with the first row containing the value "1" and the second row containing the value "2".

fulltext URLs ☆

File Edit View Insert Format Data Tools Help Get URLs All changes

Print Undo Redo Formula \$ % 123 Arial 10 Run Script

fx	A
1	
2	

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fulltext URLs ☆

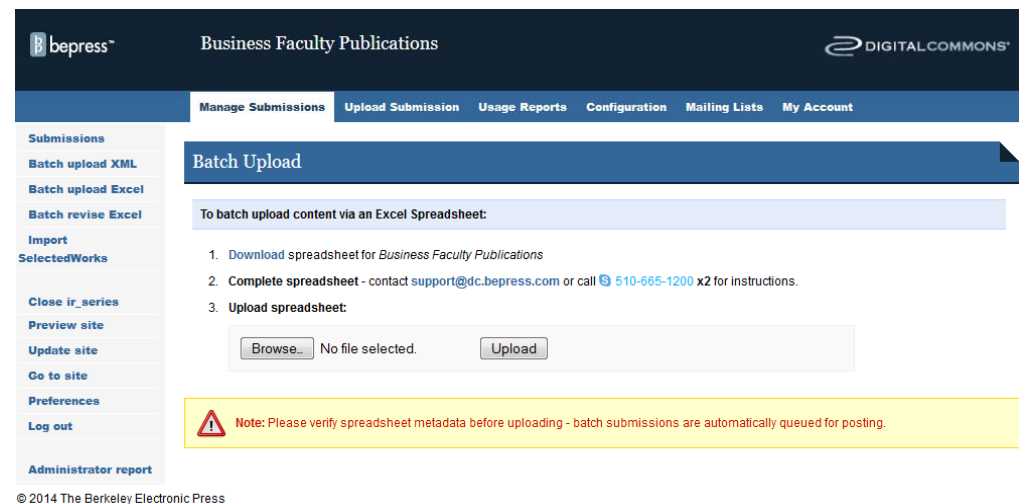
File Edit View Insert Format Data Tools Help Get URLs All changes saved in Drive

fx | 15thDefenseElmerWBrown.jpg

	A	B
1	15thDefenseElmerWBrown.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/15thDefenseElmerWBrown.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/15thDefenseElmerWBrown.jpg</a>
2	FishermansShackFredCarlo.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FishermansShackFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FishermansShackFredCarlo.jpg</a>
3	FrostedRoofTopsFredCarlo.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FrostedRoofTopsFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/FrostedRoofTopsFredCarlo.jpg</a>
4	IveKnownRiversWilliamESmith.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/IveKnownRiversWilliamESmith.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/IveKnownRiversWilliamESmith.jpg</a>
5	JungleBreakfastElmerWBrown.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/JungleBreakfastElmerWBrown.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/JungleBreakfastElmerWBrown.jpg</a>
6	LandscapeWilliamESmith.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LandscapeWilliamESmith.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LandscapeWilliamESmith.jpg</a>
7	LittleGirlWithHoodFredCarlo.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LittleGirlWithHoodFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LittleGirlWithHoodFredCarlo.jpg</a>
8	LittleJoyWilliamESmith.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LittleJoyWilliamESmith.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/LittleJoyWilliamESmith.jpg</a>
9	MaybeTomorrow850WilliamESmith.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/MaybeTomorrow850WilliamESmith.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/MaybeTomorrow850WilliamESmith.jpg</a>
10	MeditationFredCarlo.jpg	<a href="https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/MeditationFredCarlo.jpg">https://googledrive.com/host/0B6DMMA0K5cJkOEoyUHZCZUV3VVU/MeditationFredCarlo.jpg</a>
11		
12		

# Batch Upload

- Resolve errors
  - Spaces in filenames
  - .xlsx extension

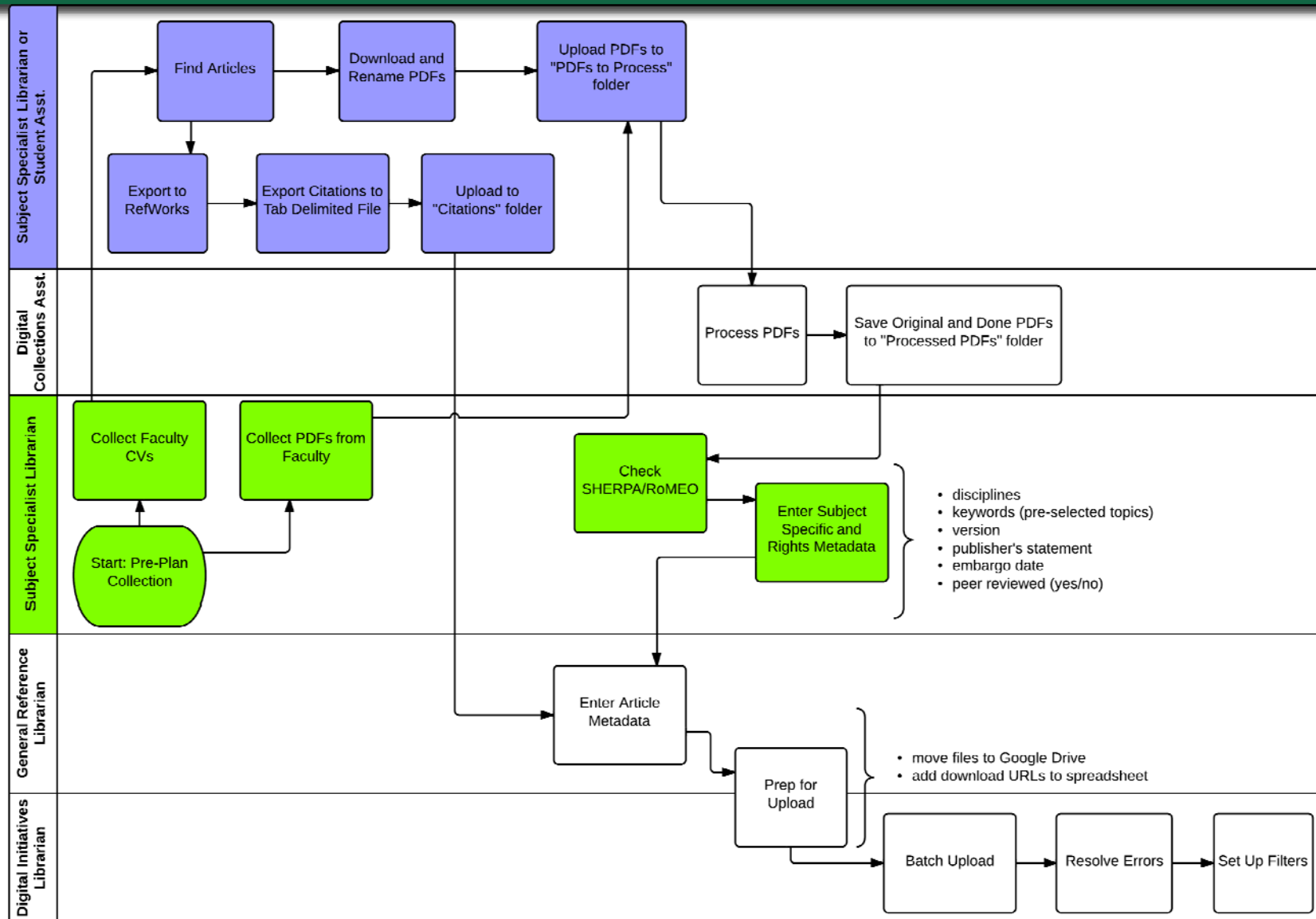


Department\_LastName\_FirstWordTitle.pdf

example: Acc\_Fuglister\_Analysis.pdf



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Michael Schwartz Library

## RESEARCH GUIDES

[Michael Schwartz Library](#) » [Research Guides](#) » Working with EngagedScholarship@CSU

[m.a.miles24@csuohio.edu](#) « [Guide Admin](#) « [Dashboard](#) « [Sign Out](#)

### Working with EngagedScholarship@CSU

Tags: [bepress](#), [engagedscholarship](#), [institutional repository](#), [ir](#)

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

Last Updated: Jul 24, 2014 | URL: <http://researchguides.csuohio.edu/EngagedScholarship> | [Print Guide](#)

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This Guide

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#### E-Publishing at MSL

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



[EngagedScholarship@CSU](#)  
[Bullet Points](#)



[MSL E-Publishing Programs](#)



[Purpose & Features](#)

[Comments \(0\)](#)

#### Get Inspired



[How to Fill Your Institutional Repository: Or, Practical Lessons I Learned by Doing by Paul Royster](#)

[Comments \(0\)](#)

#### Welcome

This research guide gathers resources that you may want to consult while working in CSU's institutional repository, [EngagedScholarship@CSU](#).

[Comments \(0\)](#)

#### Terminology

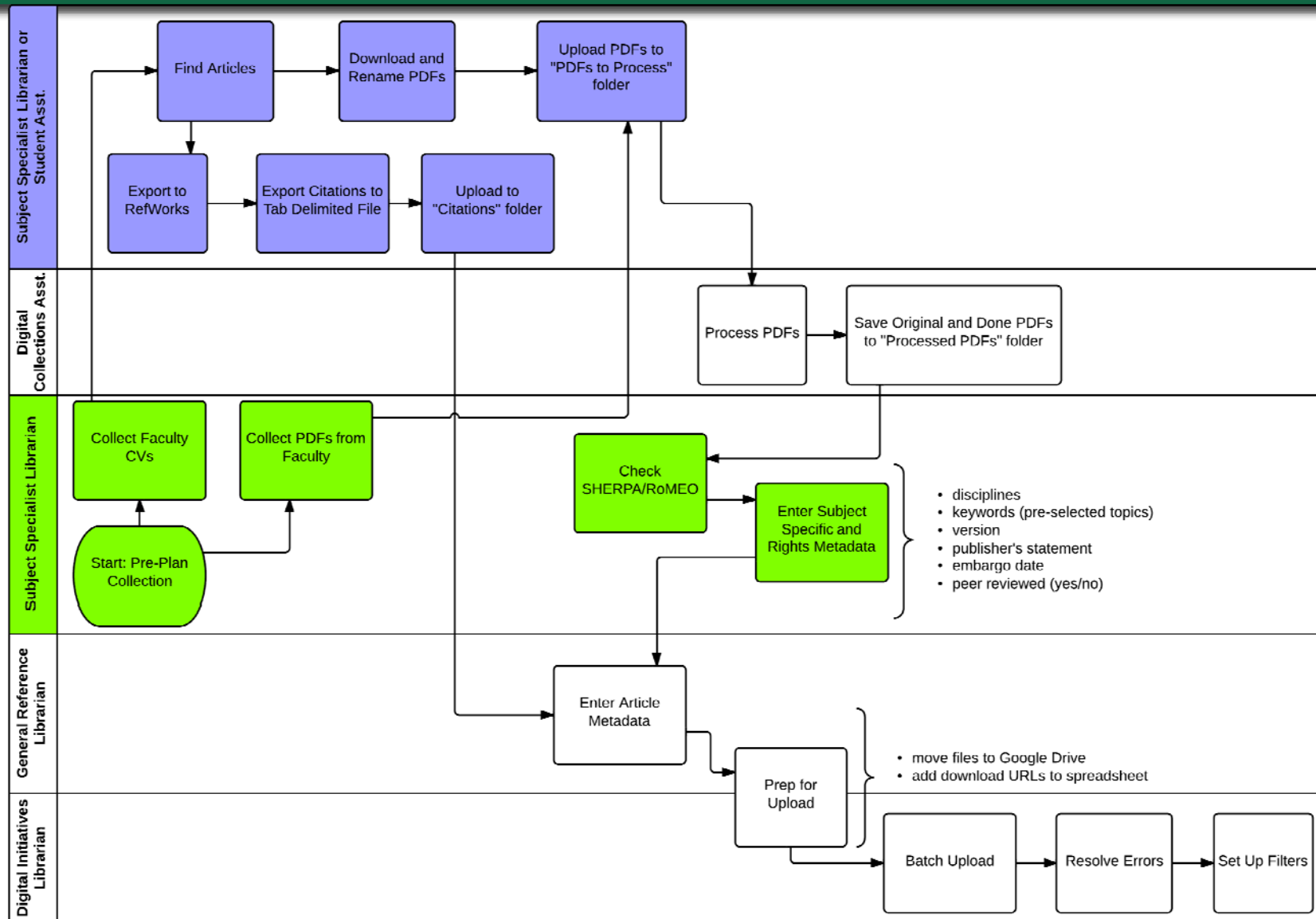
**bepress:** Founded by professors in 1999, bepress exists to serve academia. They deliver scholarly communications and publishing services for academic institutions, empowering their communities to showcase and share their works for maximum impact. Through services bepress seeks to link communities 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 be credited 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.

**EngagedScholarship@CSU:** Cleveland State's implementation of Digital Commons.

# EngagedScholarship @CSU



# 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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