

Batch Upload, Export and Revise with Excel: How to Manage Bulk Records in a Digital Commons Repository

Version: October 2012

Available at <http://digitalcommons.bepress.com/reference/14>

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Upload, Export and Revise Records via an Excel Spreadsheet

The bepress Digital Commons platform allows administrators to upload and revise multiple records for publications in the repository. This document outlines the technical steps for a Digital Commons administrator with Batch Upload privileges enabled.

The feature works by allowing administrators to upload, export or revise a file containing metadata for multiple submissions. As metadata requirements differ from publication to publication, the batch upload feature limits uploads to single publications to ensure metadata integrity.



For all Digital Commons publication contexts (including series, ETDs, event communities, image galleries, journals, and books) administrators have the ability to upload metadata and full-texts.

Note: New records can also be uploaded to the repository using XML batch import. If you are interested in this method, please contact Client services for more information.

Common Use Cases

- Administrators may use batch features to migrate records from other repositories, databases, websites or related services.
- Department administrators can use batch features to import content provided via CV or other faculty-based lists.
- Journal editors can use batch features to make their back content available.

- Institutions can use batch features for ETD migrations.

Prerequisites

Privileges: If you are unable to access the batch tools, check with Client Services to ensure you have the appropriate administrative privileges.

Excel Spreadsheets: For batch upload, export, and revise, you'll need to be able to open and work with Excel spreadsheets (specifically .xls files). The following instructions will explain how to prepare and upload Excel spreadsheets to add or alter records on your Digital Commons repository.

Metadata: Most metadata can be entered freely into the spreadsheet. Some fields, like "Document Type," rely on controlled lists. For these fields, specific values are required. If any fields on the upload form use controlled lists, check with Client Services to ensure you have the correct values.

Full-Text Files: To import full-text files to the repository, the files must be located on publicly accessible servers.

Batch Upload

To batch upload:

1. Each publication (e.g., series, journal, image gallery) in Digital Commons has a unique Excel spreadsheet. Go to the Manage Submissions tab for any publication, and click on the sidebar link "Batch Upload Excel."
2. Click "Download" to download the spreadsheet to your computer.
3. Complete the spreadsheet, one record per row, with the metadata you wish to upload. The columns highlighted in red are required for each record. Hover over the column headers for information on each field.
4. When you have completed the spreadsheet, return to the "Batch Upload Excel" screen in Step 1, and upload the Excel file.



If the upload is successful you will receive a confirmation email. If there is a problem with your spreadsheet, the system will return an error message asking you to revise the spreadsheet.

Note: You may receive an onscreen error message at the time of upload or via email after you upload. This is not uncommon when a batch upload is first attempted. You may need to make

some adjustments to your metadata in order to proceed. Please contact Client Services if you need additional guidance.

5. After you receive the confirmation email, you may preview the records: Go to the Manage Submissions screen, change the Status to "Queued," and then click the title to preview the record. If you are satisfied with the preview, press the "Update site" link to make every currently queued record publicly available.

Batch Export and Revise

The Digital Commons platform allows administrators to export and revise multiple records at once via an Excel spreadsheet. **To batch export:**

1. Click the "Batch Revise Excel" sidebar link located in the Manage Submissions screen for the publication (e.g., series, image gallery, event community, journal).
2. Click on "Generate." A spreadsheet containing the current metadata will then appear at the top of the Spreadsheet History.
-  3. Click the "Download" link to complete the export and save the file to your desktop. If multiple versions are present, the date/time stamp will help you to select the version to export.

To batch revise:

1. Using the spreadsheet from your batch export, enter your changes and new submissions. The columns highlighted in red are required for each record. A value is also required for each record in the "issue" column. When you have finished, return to the "Batch Revise Excel" page in Step 2 of your batch export, and upload the revised file.

For submissions highlighted in yellow, note that author information has been truncated on the spreadsheet. Author information that is not displayed for these submissions must be edited through the Manage Submissions screen.

-  2. You will receive an email with a summary of the changes and additions. Use the links to accept or cancel. If there are formatting errors in the metadata, you will receive an email notification indicating the nature of the error. Once you have corrected the error, upload the spreadsheet and await a summary email.
3. After you click the summary email's "accept" link, the system will process the spreadsheet.
4. After the system processes the accepted changes successfully, you will receive a confirmation email with links to preview or update the publication. If you are satisfied with the preview, press the "Update site" link. Revisions to live submissions, and new submissions entered via the spreadsheet, will become publicly available.

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Submissions that were unpublished as of Step 2 will be revised but will remain unpublished after you update the site. You may post them using your usual workflow or leave them unpublished.

If you have any questions or encounter any difficulty, please contact us at support@dc.bepress.com or 510-665-1200, ext.2 for further assistance.

Common Fields for Batch Upload and Export

If you would like to add a field to your spreadsheet or need assistance with custom fields, please contact Client Services.

abstract - The abstract/description for the article

author1_fname - First author/creator's first name. See also **author1_is_corporate** to use this field for corporate authors.

author1_mname - First author/creator's middle name

author1_lname - First author/creator's last name

author1_email - First author/creator's email address

author1_institution - First author/creator's Institution

Additional Author/Creators will be entered as author2_fname, author2_mname, etc. Four authors are currently included, but more authors may be included by inserting additional author columns.

author1_is_corporate – Indicates whether a given author is an institution. The default is FALSE. To indicate a corporate author, enter TRUE in this cell, and enter the name of the institution in the **author1_fname** cell.

acknowledgments - The cover page footnote/acknowledgments

comments - Additional information and acknowledgments

create_openurl – The default is 0, which does not create an OpenURL for the article. To create an OpenURL for an article, place a 1 in this cell.

custom_citation - Used when the series needs a specific, custom citation rather than the default.

degree_name - Name of the degree associated with the work. (example: Masters in Operations Research)

degree_type - The type of degree. Generally, this will be entered as: thesis or dissertation.

department - The Department for the ETD

disciplines – Separate disciplines with a semicolon (e.g. Arts and Humanities; American Film Studies). *A master list of disciplines is located at: <http://digitalcommons.bepress.com/reference/9/>*

document_type - The document type for each record. This is specific to each publication. Contact your Client Services Representative for a list of available values.

embargo_date - The date the record will be publicly available. For batch uploads, enter 0, 365, 540, 730, or 1095 to indicate the number of days until an embargo expires. For batch revisions, enter the date of expiration in MM/DD/YYYY format; if embargo date is a required field but the record is not under embargo, enter today's date to proceed.

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fulltext_url - The URL of the main document (.pdf, .doc, .dox, .jpg, .gif, .png, .bmp). If the file is on a publicly accessible server, the system will copy the file at the URL provided and store it in this record.

identifier - Common for images. A unique ID value for the resource

keywords - Please separate keywords/keyword phrases with commas

latitude - Latitude for the geolocation feature (needs to be valid and verified before the batch upload form is completed).

longitude - Longitude for the geolocation feature (needs to be valid and verified before the batch upload form is completed).

multimedia_url - The URL of the streaming media file

multimedia_format - When using streaming media, this is the format of the media file. Please use the values below. The format options are:

- **embedly** – Other rich media
- **flash_audio** - Flash Audio (mp3)
- **flash** - Flash Video (flv, swf)
- **qt_audio** - QuickTime Audio (aif, aac, mid, midi, mov, m4a, wav)
- **quicktime** - QuickTime Video (3g2, 3gp, mov, mp4, mpg, mpeg)
- **real_audio** - RealAudio (ra, ram, rm)
- **real_player** - RealVideo (ram, rm, smi, smil)
- **swf_object**
- **vimeo** - Vimeo
- **windows_audio** - Windows Media Audio (wma)
- **windows_media** - Windows Media Video (avi, wmv)
- **youtube** – YouTube

publication_date - The publication date of the record. Please use MM/DD/YYYY format.

rights - Copyright and/or usage rights information for images

season - The season corresponding to the publication date. Values are: Winter, Spring, Summer, and Fall.

subject_area - The subject area for each record. This will be specific to the publication.

title - The title of the record

The following fields will appear at the right end of the Batch Revise spreadsheet in grey and are for system use only:

calc_url - Unique URL generated by the system for each record

context_key – Unique identifier generated by the system for each record

issue - Publication (e.g., series, image gallery, journal, event community) identifier

ctmtime – Unique time stamp for each record