

Video Transcript: Excel Batch Upload Tutorial

Video Duration: 4 minutes, 03 seconds

[Title card – “Managing Bulk Records in Digital Commons: Excel Batch Upload Tutorial”]

Thanks for tuning in. Today we are going to cover Managing Bulk Records in Digital Commons, an excel batch upload tutorial.

[Homepage of Anthropology Faculty Publications demonstration series]

The bepress Digital Commons platform allows administrators who have Batch Upload permissions enabled to upload multiple records to publications in the repository. This video will outline the steps for administrators who wish to batch upload records using Excel.

In this example, we will import to the demonstration series Anthropology Faculty Publications, starting at the front end of the series and already being logged in.

From the Administrator Toolbar at the top of the screen, go to Manage Submissions.

[Manage Submissions screen]

On the Manage Submissions screen, click “Batch Upload Excel” in the left-hand sidebar.

[Batch Upload screen]

First, download an import spreadsheet formatted for the series. If the series has custom metadata fields, those fields will automatically appear in the spreadsheet.

If you experience any difficulties in downloading the spreadsheet, contact Consulting Services. Let’s now click on the Download link.

[Viewing the downloaded batch import spreadsheet, cursor hovers over a column heading]

The spreadsheet will have a column for each metadata field in your series featuring the system field names. The fields highlighted in RED are required fields. If we hover the cursor over the column title, additional information about each field is displayed.

[The “document_type” column with cell selected containing the value “article”]

Metadata can be entered freely in most columns. However some fields, such as “Document Type,” rely on controlled vocabulary lists. If you are utilizing fields with controlled lists, check with your Consulting Services Representative on the appropriate text for these fields.

[Switches to pre-filled batch import spreadsheet ready for upload]

In the Excel Batch Upload document, enter one record per row.

This pre-filled sample spreadsheet contains the list of faculty publications from the Anthropology department formatted for import.

The sample spreadsheet contains the metadata for each record we will upload, including the title, full-text URL, author, etc.

If there are more authors than author columns in the spreadsheet, more columns can be added to the spreadsheet, following the format of the existing columns for authors.

[The “fulltext_url” column is highlighted on the pre-filled spreadsheet]

If importing full-text files, the papers need to be hosted on a publicly accessible server.

[A cell is selected containing the value “true” in the “author2_is_corporate” column]

For corporate authors, we would change the value in the “author is corporate” field to “true”

[An organization name is entered in a cell in the “author2_fname” column]

We’d also enter the organization or other corporate author in the author first name column.

[Returns to Batch Upload Excel screen in Digital Commons series]

Once the spreadsheet is filled out, save it in a .xls format and return to the Batch Upload Excel screen in the browser window.

Here, we will upload the saved spreadsheet in Step 3. First, browse for the file, open it, and click “Upload”.

A message will display that the import has been queued. You can use the “Batch status” link in the sidebar at any time to check the status of your upload.

[Points out “Update site” link in sidebar]

When the import completes, the system will send an email confirmation listing the imported records. To publish these submissions, click “Update Site” in the left-hand sidebar of the Manage Submissions or Configuration screen.

[Manage Submissions screen with “Queued for update” submissions showing]

Alternatively, the imported articles can be previewed by going to the Manage Submissions tab in the top toolbar, or by using the link provided in the confirmation email.

When everything looks correct, click “Update site” in the sidebar and all queued articles will be published to the front end of the series.

[Batch revise spreadsheet showing placeholder submissions from batch upload]

If there were any errors in your upload, placeholder submissions will be created for the unsuccessful items and you'll have the opportunity to batch revise the placeholders to fix the errors.

You will receive an email indicating the results of your upload and providing a link to download a spreadsheet containing the imported placeholder data.

[Batch Revise screen]

Once you have corrected the errors, upload the spreadsheet to the Batch Revise Excel page.

You'll receive an email prompting you to accept the revisions. Once the placeholder submissions are revised, they will be queued to go live at the next update.

[Closing screen with details for contacting Consulting Services]

And that's the end of the Batch Upload tutorial. As always, if you have any questions about Batch or Digital Commons, please contact Consulting Services at dc-support@bepress.com or 510-665-1200. Thanks, and have a good rest of your day.