Video Transcript: Batch Uploading Back Content in a Digital Commons Journal

Video Duration: 5 minutes, 47 seconds

Hello and welcome to the Batch Upload training for journal editors. If you have back content that you want uploaded to your journal, you've come to the right place. We're going to show you how to upload previously published volumes and issues using the Batch Upload tool. In order to use the Batch Upload and Batch Revise tools, you will need a special editor permission. Please contact Consulting Services if you're unsure if you have been granted this permission.

After we've logged in as an editor, we can access the "Manage Submissions" page from our "My Account" screen.

Once you've arrived at this page, you'll see that the left sidebar offers several different options related to "Batch": Batch upload XML, Batch upload Excel, Batch revise Excel, and Batch Status. The first two allow us to upload multiple submissions into an issue at once. The Batch revise Excel tool allows us to revise many submissions at once, and Batch Status allows us to check on any batch actions we've taken.

We're going to be doing Batch upload Excel today, so let's click there.

It's important to remember that when using the Batch Upload Excel tool for journals, you can upload content for only a single issue at a time. If you want to upload content for more than one issue, you will have to repeat the batch upload steps for each issue. If you haven't yet created a new volume and issue for the journal, you'll get a notice that there are no open issues. If you have created a volume and issue, then you will be uploading articles to that issue. Note that if you have multiple open issues, like we do on this screen, you'll see an additional step that will require you to choose a target volume and issue to which you will be uploading. If you need some guidance on how to create new volumes and issues, please see our video on Creating Volumes and Issues in a Digital Commons Journal.

Now that we're on this screen, we'll see a series of steps that will take us through the Batch Upload process. The first one is a link that says "Download spreadsheet for" the journal. Click on the word "Download" to access a spreadsheet that has been formatted specifically for this journal.

As you can see, this spreadsheet will have a column for each metadata field in your journal. The fields highlighted in red are required fields. If we hover the cursor over the column title, additional information about each field is displayed. Metadata can be entered freely in most columns. However, some fields such as "document_type" and "disciplines" rely on controlled vocabulary lists. If you're using fields with controlled lists, check with Consulting Services to find out the appropriate text for these fields.

Rather than make you watch us fill out this spreadsheet, we'll skip ahead to a spreadsheet that has already been completed. This spreadsheet should contain one issue's worth of content, since we're uploading a single issue at a time. Add the articles to the spreadsheet in the order they should appear in the published issue. Our sample spreadsheet contains the metadata for each record we will upload, including the title, a link to the article in the "fulltext_url" column, author, and so on. In order to import full-text files, they will need to be hosted on a publicly accessible server, either on a website hosted by your institution or using a third-party service. Make sure that the files at these URLs can be accessed by anyone, in order to allow the Digital Commons platform to import them. 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.

Once the spreadsheet has been filled out, make sure to save it. Then we will return to the Batch Upload Excel screen in the browser window.

We've completed steps one and two. Step three is to choose a target issue, since we have multiple issues open. Our next step will be to upload the saved spreadsheet. First, choose the file. Open it, and then click "Upload." We'll see a message that informs us that the import has been queued.

The system will now process the spreadsheet, and we'll receive an email when it completes. If there was an error, follow the steps in the email to correct it, and please don't hesitate to contact Consulting Services if you have questions.

If the spreadsheet processed successfully, the email will tell us that we can "preview" or "revise" the queued submissions before updating the site to publish all the articles in this issue. Let's click preview.

We could click on the title of these "Queued" submissions and review the metadata to ensure everything looks good. In this case, everything looks as it should, and we are ready to publish the issue. Let's click "update."

The system will process the update, and we'll receive another email notification when the update completes.

When we receive confirmation that the update completed, we will be able to visit the journal and see the newly published articles.

Congratulations on publishing your new issue! As always, please feel free to contact us if you have any questions or concerns.