Tailoring reports to stakeholder needs: Combining data from Digital Commons content inventory and dashboards

Jennifer Deal

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Tailoring Reports to Stakeholder Needs: Combining Data from Digital Commons Content Inventory and Dashboards

MIRL | November 17, 2022 | Jennifer Deal

Advocate Aurora Library
Who are we?

- Aurora Health Care in Wisconsin and Advocate Health Care in Illinois merged into Advocate Aurora Health in 2018 (12th largest not-for-profit health system in US)
- 27 hospitals, 500+ sites of care, and 75,000+ employees
- Institutional repository (IR) started in 2014 at Aurora Health Care
- IR Stakeholder groups include:
  - Graduate Medical Education
  - Advocate Aurora Research Institute
  - Nursing Research
The ask:
One cohesive report for Aurora Graduate Medical Education scholarly activity

Previous process was haphazard and duplicated efforts

Library approached as a challenge, but also an opportunity to strengthen a valuable partnership
Ways we were well-positioned

Scholarly activity organized by GME program

- Aurora Graduate Medical Education
  - Aurora Faculty
    - Aurora UW Cardiology Faculty
    - Aurora UW Chiropractic Faculty
    - Aurora UW Complex General Surgical Oncology Faculty
    - Aurora UW Diagnostic Radiology Faculty
    - Aurora UW Electrophysiology Faculty
    - Aurora UW Family Medicine Faculty – Lakeland (Rural)
    - Aurora UW Family Medicine Faculty – Milwaukee
    - Aurora UW Gastroenterology Faculty
    - Aurora UW Geriatrics Faculty
    - Aurora UW Heart Failure Faculty
    - Aurora UW Hematology/Oncology Faculty
    - Aurora UW Hospice/Palliative Medicine Faculty
    - Aurora UW Internal Medicine Faculty
    - Aurora UW Interventional Radiology Faculty
    - Aurora UW Palliative Care Faculty
    - Aurora UW Ob/Gyn Faculty
    - Aurora UW Transitional Year Faculty
    - Aurora UW Undersea and Hyperbaric Medicine Faculty
  - Aurora Residents and Fellows
    - Aurora Cardiology Fellows
    - Aurora Chiropractic Residents
    - Aurora Complex General Surgical Oncology Fellows
    - Aurora Diagnostic Radiology Residents

Submission form process

- PubMed ID

  If your article appears in PubMed and you have the PubMed ID, enter it here. The information from PubMed will be used to pre-populate the submission form and then you can add to or edit information below.

- Enter External Article ID

  - PubMed ID
  - Import

- Title

  Ensure the title does not include a period at the end. Remove periods if necessary. Also ensure that the first word of the title has the first letter capitalized. All other words should be in lowercase.
  
  e.g. Health care transformation is inevitable

- Enter title:

- Authors

  Your name and email address will default in as the first author. Please remove if you are filling out this form on someone else's behalf. Ensure all authors are included with their full email addresses and Advocate Aurora Health as the institution for all affiliations.
## Some challenges

<table>
<thead>
<tr>
<th>Content Inventory Report</th>
<th>Dashboard Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication/presentation date</td>
<td>Submission to IR date</td>
</tr>
<tr>
<td>Document type</td>
<td># of downloads</td>
</tr>
<tr>
<td>AMA formatted citation</td>
<td># PlumX Usage</td>
</tr>
<tr>
<td>All GME programs represented (custom field)</td>
<td># PlumX Citations</td>
</tr>
<tr>
<td>ACGME Web-Ads (custom field for accreditation purposes)</td>
<td># PlumX Captures</td>
</tr>
<tr>
<td>Uploader identification</td>
<td># PlumX Mentions</td>
</tr>
<tr>
<td></td>
<td># Social Media Likes, Shares, Tweets</td>
</tr>
</tbody>
</table>
The solution:

Merge Content Inventory and Dashboard reports into one cohesive report.
Report #1: Content Inventory

- Can run for multiple series concurrently
- Can choose to include collected content if you use collection filters in your IR
- Can exclude unpublished content if desired
Report #1: Content Inventory

- Publication date: Data tab > Sort Z→A
- Make sure to Expand the selection
- Delete rows out of date range
Report #2: Dashboard Downloads

- Dashboard > Usage tab > Generate Downloads report
- Must repeat for all appropriate series and manually combine
- Submission date: Data tab > Sort Z→A / Expand selection
- Delete rows out of date range
Report #2: Dashboard Downloads

Conditional Formatting to flag duplicates

Find & Replace to match URLs

Advocate Aurora Library
Report #3: PlumX data

- Dashboard > PlumX tab > Export PlumX metrics
- Must repeat for all appropriate series and manually combine
- Match records by Title instead of URL
Merge reports

- Sort A→Z by Title
- Ensure all rows match
- Insert desired Dashboard report columns into Content Inventory
### Increase readability

- Put important columns at beginning
- Update column titles
- Shade important columns and add borders
- Strip HTML formatting: `<p>`, `</p>`, `<strong>`, `</strong>`, `<em>`, `</em>`
Some pointers

Questions for stakeholders:

1. What data to include?
2. How often do they want reports?
3. If limiting by date, which date is more important to them: publication/presentation or when it was added to the IR?
4. Work out timeline for when various tasks are due and who is responsible.

Best Practices

1. Ask stakeholder group to communicate expectations to members. IR staff can play a supporting role by giving demos at meetings, sharing documentation, and answering technical questions.
3. Most importantly, keep detailed notes for yourself.
Contact Info

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