

Video Transcript: Collection Tutorial, Part 2 – Automatic Collection

Video Duration: 3 minutes, 11 seconds

[Title card]

Welcome to Part 2 of the tutorial for the Digital Commons Collection tool. In Part 1, I covered how to manually collect records so that they're listed in more than one publication at a time. However, sometimes there are a lot of records to collect. In these instances, setting up an auto-collect filter can be very useful.

[Browses to series on demo site]

Let's revisit the series from Part 1. Here I have a slew of submissions that have titles starting with the words "Research Study." I'd like to set up a series to display all of my research studies, so I need to configure a collection that will automatically grab these records.

To do this, I'll first browse to the destination publication from the back-end, then click the Collection tool from the sidebar as I did in Part 1.

Now, I could accomplish this goal using a manual collection, but it would be time-consuming to copy and paste all of those URLs, so this time I'll click the "Create New Filter" button.

On this page, I can define parameters that will target my submissions. First, I need to specify which publication the filter will search by clicking the "Within Publication" drop-down menu. I can leave "All" selected, but this may cast too wide of a net. I'm going to select the series where those research studies are located.

Next, I can add and remove rows that define the records that I'm looking for by clicking the 'plus' and 'minus' buttons. The first drop-down for each row dictates which metadata field to look within. For my collection, I'm going to choose "Title." Note that many different fields are available, and if your series has some custom fields that you'd like to filter by, you can contact Consulting Services to enable them for this list.

For my example, I know that all of my research studies have titles that begin with the words "research study," so I'm going to select "starts with" for the first menu, and then type in "research study" in the box that follows. Note that these filters are not case-sensitive, so my filter will still pick up the entries that had capitalized titles.

Now, because each filter will only collect articles that match *all* parameters, I need to remove any additional rows that I'm not using. I also want to enter a label so I can identify this filter later. I'm simply going to call this one "Research Studies."

In order to preview my collection filter's results, I can click the "View" button. It looks like my filter is successfully grabbing all of my research studies! From here, I click "Save," and update my publication so that the collected records appear. The auto-collection process can sometimes require a bit of time to complete, so if you don't see the records appearing immediately on the front end, try waiting a little while and then update again.

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[Visual card with diagram showing dynamicity of auto-collect]

If any newly posted records meet the parameters of an auto-collect filter, then they'll be automatically collected to the publication. The publication is then automatically updated so that the newly collected records display. Using my example, if I were to publish new records to my original series that start with the title "Research Study," then they would automatically appear in the collection as well.

[End card with info for contacting CS]

This concludes our tutorial on the Collection tool. If you have any questions, please check out the first part of this tutorial or contact Consulting Services at dc-support@bepress.com or call 510-665-1200, option 2.