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Sustaining Workflows and Budget: Using Zotero, SHERPA/RoMEO, and Unpaywall to Input Faculty Works

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Overview of Project

Background

Charles C. Sherrod Library needed to input faculty works in the open access institutional repository, Digital Commons@East Tennessee State University (<https://dc.etsu.edu>).

The project included works:

- Published from 2012-2017
- Listed in curriculum vitae (CVs) voluntarily provided by faculty
- With or without an available full-text object

Limitations

Sherrod Library had limited staff and funds for the project. Staff included:

Fall and spring semesters - 1 librarian, 2 graduate assistants (GAs), and 2 Federal Work-Study positions
Summer semester - 1 librarian and 1 GA

Requirements for Sustainability

In order to sustain the project with limited staff and funds, Sherrod Library searched for free or low-cost tools to automate (within reason) the following actions for works of varying disciplines and material types:

- Entering data
- Finding copyright policies
- Locating open access documents

Solution

Sherrod Library chose the following tools to automate part of their workflow:

Zotero: Open-source reference management system with desktop and browser versions

SHERPA/RoMEO: Database of journal publishers' policies on copyright and self-archiving

Unpaywall: Browser add-on that detects open-access articles

Additional Notes

- Products were available for free online. However, Sherrod Library spent \$120/year for unlimited storage in Zotero.
- Programmer/analyst integrated Zotero and SHERPA/RoMEO.
- Staff used Zotero's group library for collaboration.

Workflow

Receive CVs from faculty who requested their works in the institutional repository.

Search online for publications listed in their CVs. For each publication, click on the Zotero Connector icon in the browser for the record to be saved in the desktop version of Zotero.

Edit data in Zotero to match local standards. For example, add affiliated institutions to the author fields and HTML tags to the abstract field.

Activate the SHERPA/RoMEO to Zotero Import Tool (see below) to add copyright permissions to Zotero records.

Export the publications' data from Zotero to a CSV file and transfer the data to a Digital Commons' batch upload Excel spreadsheet.

Enter data in local fields in the Digital Commons spreadsheet. Then, upload spreadsheet to Digital Commons.

Find and upload open access versions of the publications using Unpaywall based on the permissions listed in SHERPA/RoMEO.

Integration of Zotero & SHERPA/RoMEO

The integration between Zotero and SHERPA/RoMEO is achieved with a PHP application making use of both the SHERPA/RoMEO and Zotero XML and JSON based APIs respectively. Zotero records are retrieved and matched against available data in SHERPA/RoMEO using ISSN or Journal title in that order. When unique matches are found, available copyright permissions (pre-print, post-print, PDF, etc.) are appended to the Zotero records and sent back to Zotero using the API. The application is activated using a web interface.

For more information, visit <https://github.com/sherrodlibrary/zotero-sherparomeo>

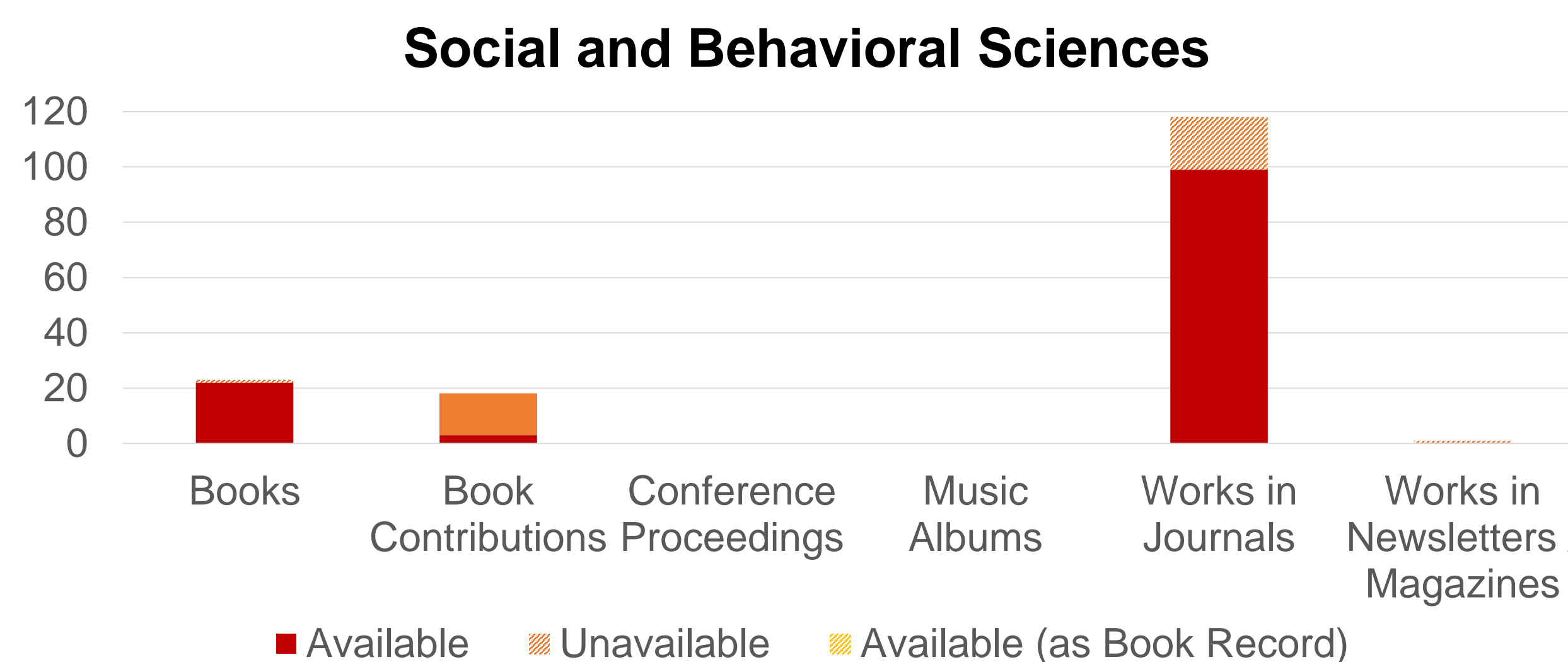
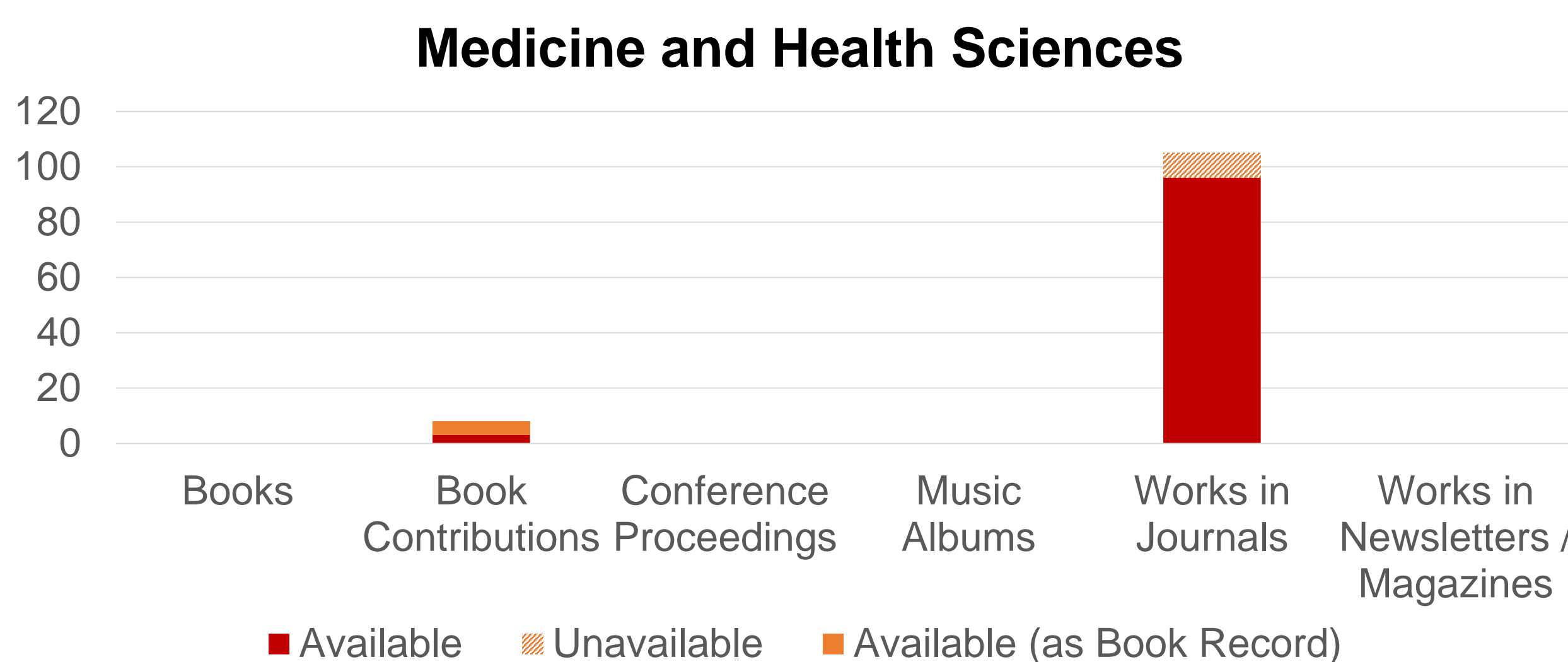
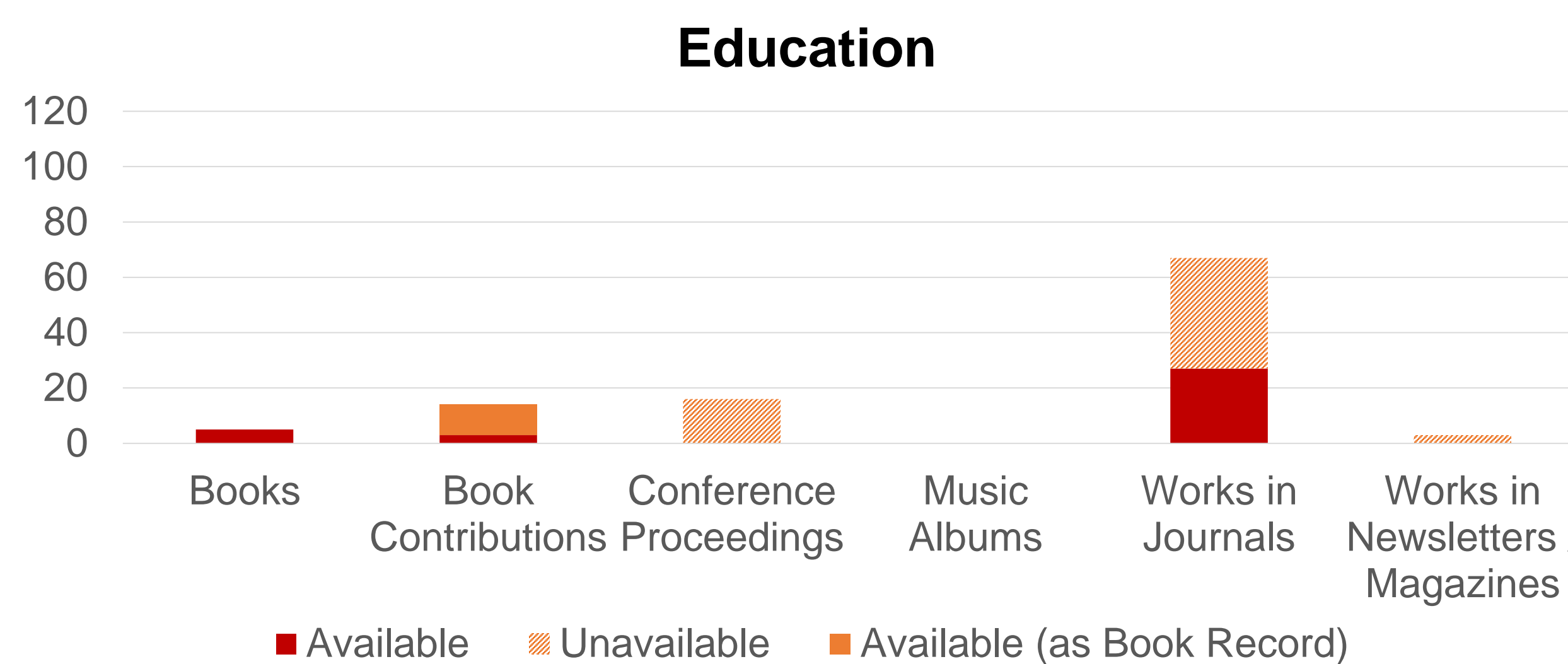
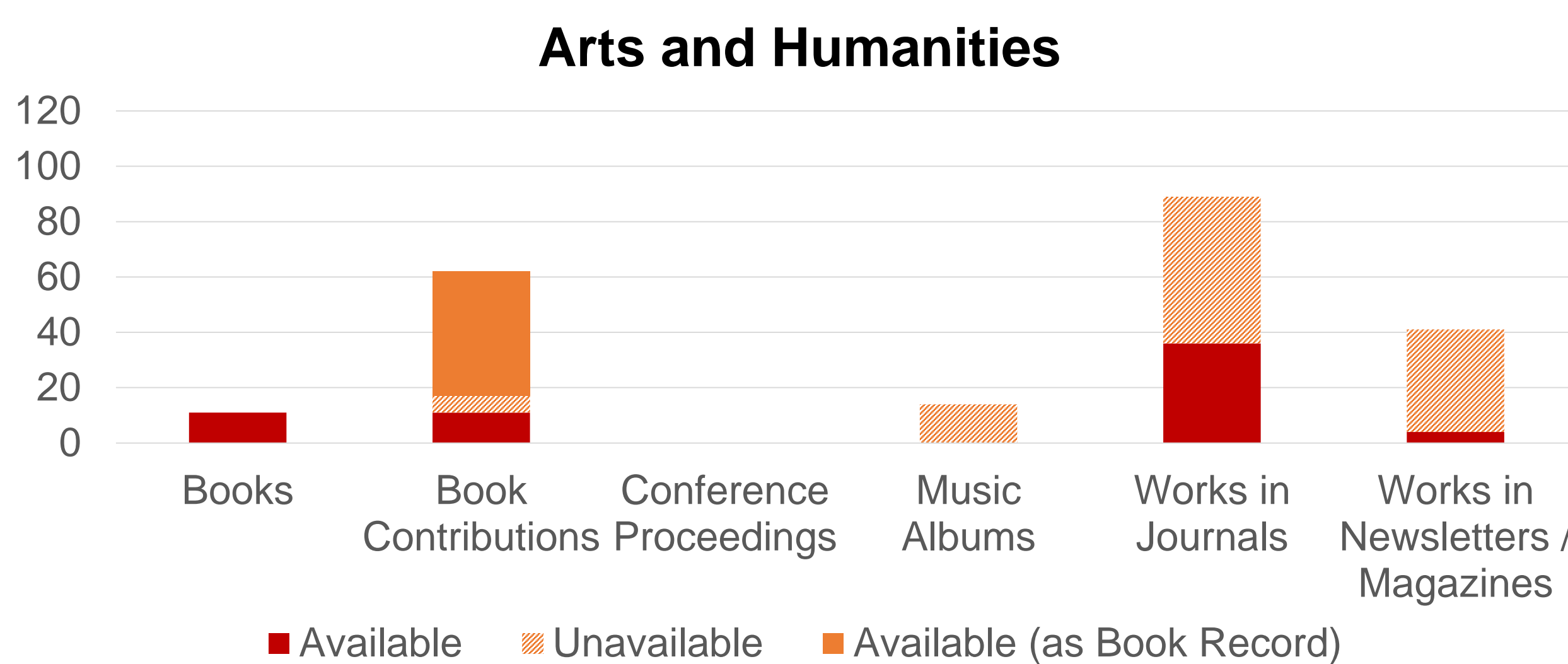
Evaluation

After one calendar year, Sherrod Library examined the availability of records for faculty works in Zotero based on disciplines and material types. Sufficiency of data was based on whether the record had a significant amount of relevant fields completed for the project.

Available: Record with sufficient data

Unavailable: Record with insufficient data

Available (as Book Record): Record with sufficient data for a book, when data was needed for a book contribution



Final Decisions

Based on the evaluation and other observations, it was decided to:

Zotero

- Continue the use of Zotero for STEM books, book contributions, and works in journals
- Discontinue the use of Zotero for conference proceedings, music albums, and works in newsletters/magazines
- Discontinue the use of Zotero for works within the arts/humanities and education disciplines

SHERPA/RoMEO

- Continue the use of SHERPA/RoMEO within Zotero as it sufficiently found copyright permissions for STEM journals

Unpaywall

- Continue the use of Unpaywall for works in journals from all disciplines. Unpaywall successfully found open access versions of works, which saved time on manually searching in various databases for them.

Significance

The evaluation of Zotero indicates areas of improvement for academic content providers' practices of open bibliographic metadata:

- Non-traditional publications (creative works and newsletter/magazine articles) lagged behind traditional publications (books, book contributions, and journal articles).
- Publications in the arts/humanities and education disciplines lagged behind those in the STEM disciplines.
- Individual works (specifically conference proceedings) uploaded with other works as a single document caused difficulty in gathering data.