

University of Michigan Law School

University of Michigan Law School Scholarship Repository

Law Librarian Scholarship

Other Publication Series

2022

Cool Tools 2022 Spotlight: Airtable

Sarah Woloschuk

Available at: <https://repository.law.umich.edu/librarian/50>

Follow this and additional works at: <https://repository.law.umich.edu/librarian>



Part of the [Law Librarianship Commons](#), [Scholarly Communication Commons](#), and the [Scholarly Publishing Commons](#)

Cool Tools 2022 Spotlight: Airtable

*In this post, **Sarah Woloschuk** talks about the features of the **Cool Tool** she demoed at the 2022 AALL Annual Meeting. Sarah is the Scholarly Publishing Librarian at the University of Michigan Law School. Questions about this Cool Tool? Contact her at swolosch@umich.edu.*

Picture this: I'm opening up an Excel spreadsheet. Contained within are the citations for faculty publications that have been held up from being added to our institutional repository (IR). The reason for the delay? All of them need to have permissions requested from a publisher before we can load a PDF. I'm new to the Scholarly Publishing Librarian position and curious about what this part of the workflow might look like.

And then I see that there are over 750 records-in-waiting.

My next thought was: how the heck am I going to keep track of what I do to clear these out? There are so many of them!

Thankfully, I found a way, and that way was building a lightweight database using Airtable. If you're dealing with a complicated repository workflow, or do scholarly communications work, this post might be for you. I presented at AALL 2022 about using Airtable for project management, and I'd like to thank LIT-SIS for letting me share a summary here about this cool tool! Not doing IR work? That's okay too; I believe if you have any workflow where a sequence of steps is relatively predictable but the timeline on which each step can be completed is not, you could build a similar project tracker.

Why Do I Need Airtable?

Sometimes I can tell from a publisher's policies on self-archiving whether I need to request copyright permissions and licensing to add that author's work to the IR. However, many other times the publisher's policy is unclear or states that I must contact them to request reuse permissions.

As mentioned, when I joined the University of Michigan, there were around 750 records for faculty publications where the permissions status was unclear or needed to be inquired after. I wanted to ensure I could be accurate and efficient as I took over the process and aimed to clear out the records in progress. I further needed some way to

track what publisher policies are, and when they change. Finally, I wanted to track where each record was in the process all the way up to, ideally, the final deposit in the repository.

That's where Airtable comes in for me. A colleague introduced me to the tool, and I trialed it for a time before adopting it fully. I found that Airtable was very intuitive to use, highly visual, and capable of functioning as a lightweight database ideal for my needs.

The Benefits Received!

So why does this matter? First of all, it's helped me organize and keep track of a very complicated workflow with many moving parts – each publication record may have to go through the same process, but the records are all at a different *step* in that process. Because publishers operate on unpredictable timelines, and we're always adding new faculty publications to the list of those which need permissions and it would be very easy to lose track of what needed to be done next unless I had this tool.

Since adopting Airtable in October 2021, I've been able to add more than 200 works requiring publisher permissions to the repository, identified 300 that we can only load a draft or other pre-publication of, and am managing the status of another 450+ records since more have continually been added to the workflow.

Building an Airtable

When I was first setting up my database, I loaded the records-in-progress as a CSV into Airtable, added other fields with options under each, and then proceeded to fill out details for each record.

My fields after a few rounds of edits and tweaks included:

- **The Citation**
- **Status of Request**
- **Decision**
- **Publication Status** (aka what needed to be done once a decision was made)
- **The date of last activity**
- **Type of material** (because sometimes the self-archiving policy of a publisher depends on the format of the publication)
- **Publisher name**

- **Publisher notes** (usually the known policy and/or contact information, copied from a separate table)
- **Other Notes**

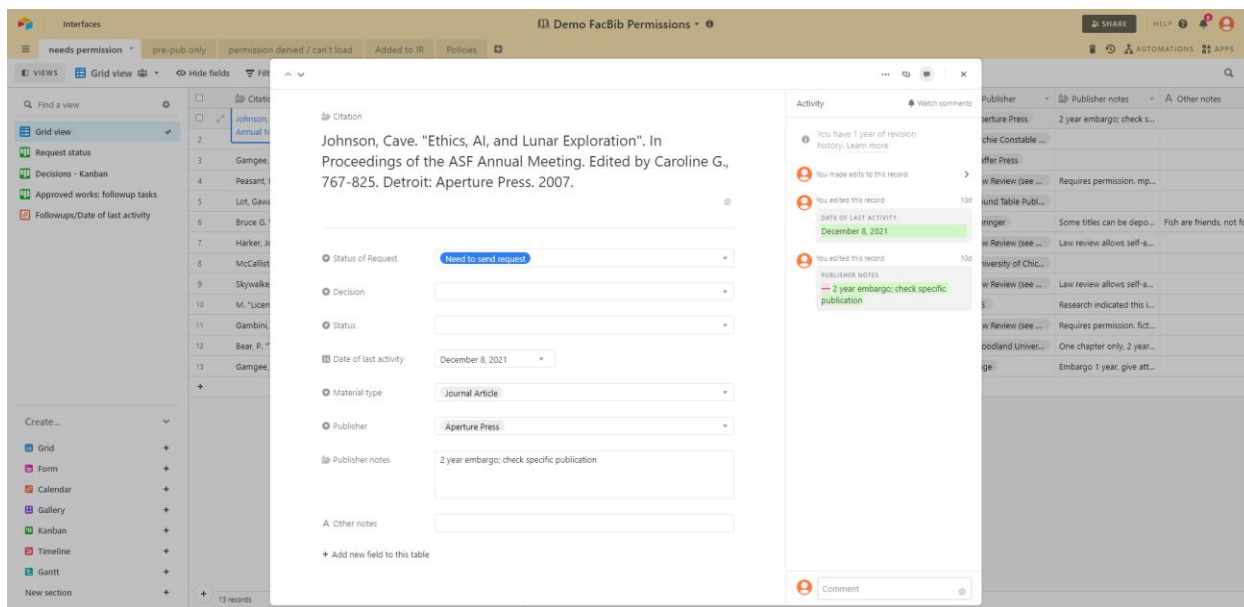
I've configured the first 3 fields after the citation to have set single-response options that I can select based on what I've done for each record, while the others help give additional context in the form of date-stamps or long-form notes.

Citation	Status of Request	Decision	Status	Date of last activity	Material type	Publisher	Publisher notes	Other notes
1 Johnson, Cave. "Ethics, AI, and Lunar Exploration". In Proceedings of the AS...	Need to send request			December 8, 2021	Journal Ar...	Aperture Press	2 year embargo; check s...	
2 Harker, Jonathan. On Comparative and Foreign Real Estate Law. Easter, U.K...	No request needed	Creative Commons		June 2, 2022	Book	Archiv Constable		
3 Gamage, Elnor. "Bequeathing the Red Book". In Estates and Gift Law Conc...	Initial request sent			May 12, 2022	Book Cha...	Gaffner Press		
4 Peasant, Dennis. "No Basis for a System of Governance: Critiquing the Viole...	Initial request sent			March 1, 2022	Journal Ar...	Law Review (see ...	Requires permission. mp...	
5 Lot, Gawain. "Keeping your Head". In What Did I Sign Up For? The importan...	2nd followup			June 10, 2022	Book Cha...	Round Table Publ...		
6 Bruce G. White. Amiable Ichthyos: A Critique of Sustenance-based Paradigm...	Need to send request			February 10, 2022	Journal Ar...	Springer	Some titles can be depa...	Fish are friends, not f...
7 Harker, Jonathan. Personal Injury Law and Real Estate Appraisal. 56 Camb L...	No request needed	Approved	Needs PDF located	May 27, 2022	Journal Ar...	Law Review (see ...	Law review allows self-a...	
8 McCallister, Kevin. "Alone at Home: Modern Interpretations of the Castle D...	Response received	Approved	PDF found	June 7, 2022	Book	University of Chic...		
9 Skywalker, Luke, and Skywalker, Leia. Questions on Inheritance in Cases of ...	No request needed	Approved	Needs PDF located	May 4, 2022	Journal Ar...	Law Review (see ...	Law review allows self-a...	
10 M., "License to Kill: When National Security Outweighs Extradition Rights" L...	No request needed	Crystall	Needs PDF located	June 2, 2022	Report	SIS	Research indicated this L...	
11 Gambini, Vincent. "The Role of Cultural Differences and Attention to Detail L...	Need to send request			November 25, 20...	Journal Ar...	Law Review (see ...	Requires permission. fict...	
12 Bear, P. "The Porridge Puzzle: At the Intersection of Criminal and Property L...	No request needed	Approved	ILL needed	April 21, 2022	Book	Woodland Univers...	One chapter only; 2 year...	
13 Gamage, Samwise. The Utilitarian Modalities of Solanus Tuberculosis 90 Gon...	Response received	Approved	Needs scanning	March 25, 2022	Journal Ar...	Sage	Embargo 1 year, give att...	

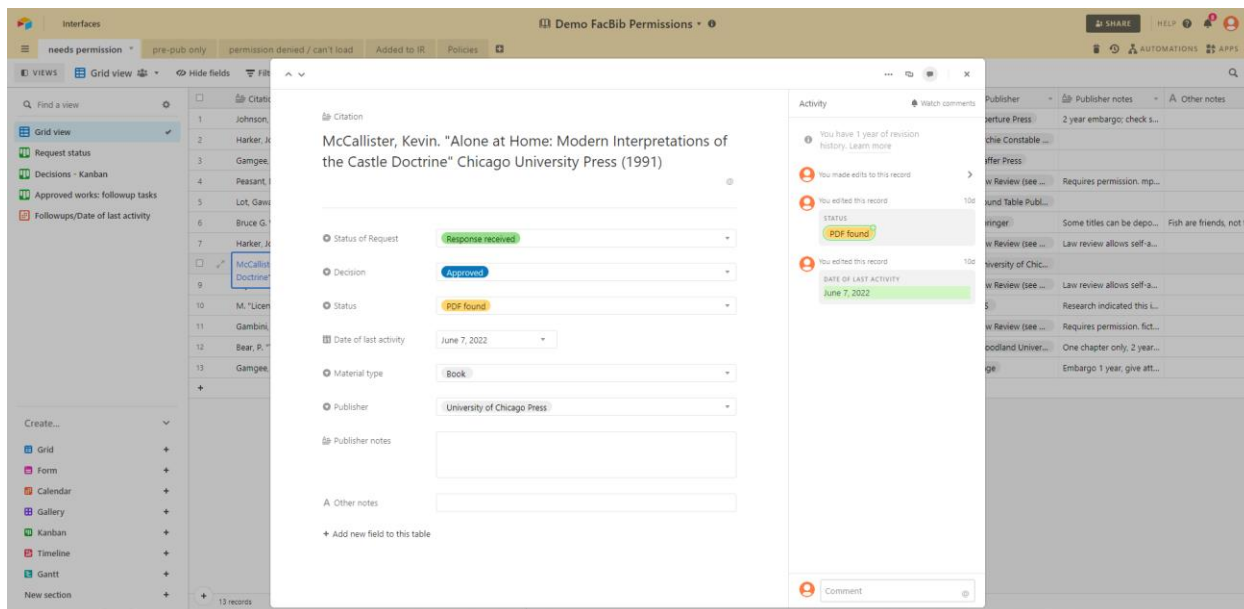
How Do I Use Airtable?

For each publication I'm requesting permissions for, the process is more or less the same.

I or a student worker may identify a publication that we think we need to request permissions for. I check the publisher policy in the Policies table view to see what notes I already have about how and whether to make a request. Then, I'll assign an initial status of "need to send request" to the record, along with the date of last activity, material type, publisher, and publisher notes. If I discover that no request is needed, I'll leave that as a note – this may happen if, for instance, the publication is licensed under Creative Commons.



From there, once a record is established, I update the relevant fields based on what actions I've taken to contact the publisher, what I hear back from them, and what needs to happen next with the publication. For example, I may need to follow up with a publisher if I haven't gotten a response back 2 weeks after I first attempt to make contact. Once I *have* gotten a response, I can note the details of that response – if it's a straightforward approval or denial of my request, or whether there are conditions for the approval. Last, I've created custom options to reflect what I'm *doing* with a publication once it's been approved – if I have found a PDF, am scanning a PDF from a print copy, have requested a PDF through ILL, and so on. These options reflect the context at my library.



Another way to think about how I'm using this Airtable would be:

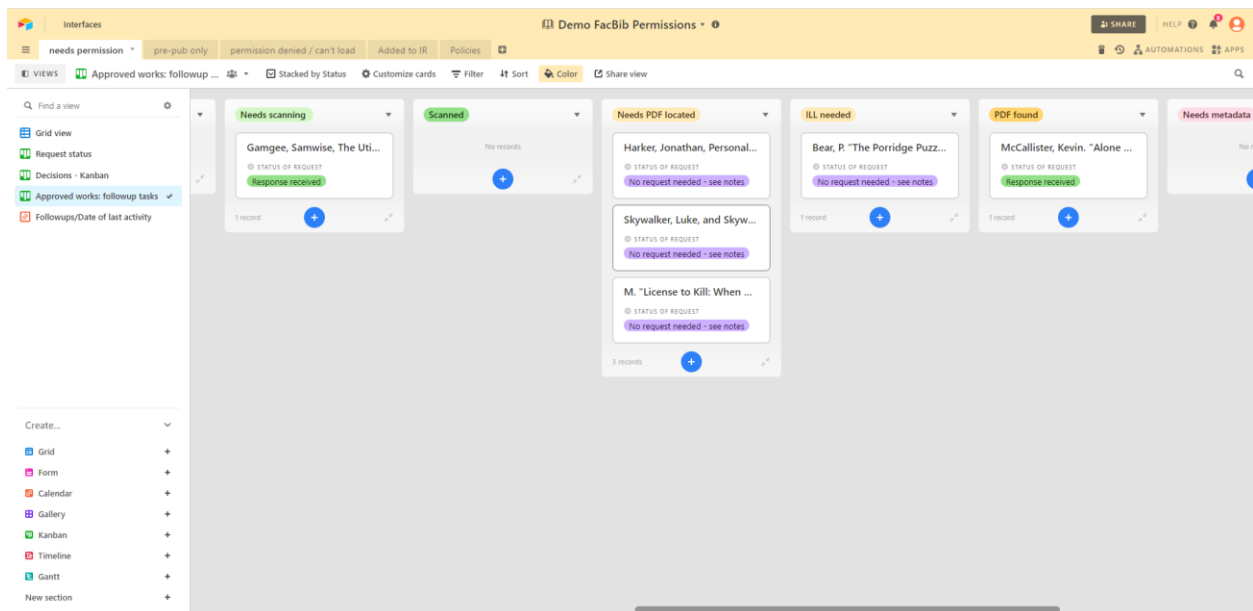
1. What I've done
2. What I heard back
3. What I need to do next
4. What happened last

The most common “final” state of a record will be “Response Received” “Approved” “Loaded in IR” “[date of loading]” and then the content of the remaining information-only fields.

At each step – or each time I update *any* part of a record in any field, including the notes field, I'll change the Date of Last Activity. This step allows me to sort or filter records effectively and to prioritize those that most need my attention.

Other Useful Features

I really love the **View options** and the **Filter** options that Airtable affords me, along with the **Field Configurations**. Airtable allows me to set up views dependent on a specific field – for instance, I can set up a Kanban view that groups together records by a field like “Status of Request”, and then I can see how many records fall into each category under that field. Or, I can view all records in the grid field and filter them so I only see those which have been approved, but need further action taken before I can load them into the IR (finding a PDF, for instance).



Citation	status of Request	Decision	Status	Date of last activity	Mater...	Publisher	Publisher notes	Other notes
1 Harker, Jonathan. On Comparative and Foreign Real Estate Law. Exeter, U.K...	No request needed	Creative Commons		June 2, 2022	Book	Archie Constable		
2 Harker, Jonathan. Personal Injury Law and Real Estate Appraisal. 56 Camb L...	No request needed	Approved	Needs PDF located	May 27, 2022	Journal Ar...	Law Review (see ...	Law review allows self-a...	
3 McCallister, Kevin. "Alone at Home: Modern Interpretations of the Castle D...	Response received	Approved	PDF found	June 7, 2022	Book	University of Chic...		
4 Skywalker, Luke, and Skywalker, Leia. Questions on Inheritance in Cases of ...	No request needed	Approved	Needs PDF located	May 4, 2022	Journal Ar...	Law Review (see ...	Law review allows self-a...	
5 M. "License to Kill: When National Security Outweighs Extradition Rights" L...	No request needed	Cyprus	Needs PDF located	June 2, 2022	Report	SIS	Research indicated this L...	
6 Bear, P. "The Porridge Puzzle: At the intersection of Criminal and Property L...	No request needed	Approved	ILL needed	April 21, 2022	Book	Woodland Univer...	One chapter only, 2 year...	
7 Gamgee, Samwise. The Libertarian Modalities of Solanus Tuberosum, 90 Gon...	Response received	Approved	Needs scanning	March 25, 2022	Journal Ar...	Sage	Embargo 1 year, give ATT...	

I can use other tables in the Airtable, using the same fields, to track inactive records – those where I’ve added the publication to the IR, where permission was denied, or I cannot load the publication for some reason.

Lastly, I’ve been able to set up an Automation so that Airtable automatically emails me every Monday with a list of records requiring follow-up (ie: where I haven’t heard from the publisher and it’s been 2 weeks since I sent my request). That way, actions are less likely to fall off my radar.

Want to Give it a Shot?

Airtable has a number of licensing options if this is something you’re interested in exploring! There is a free trial period for 3 months before you need to decide whether to move forward with a free version or pay for a license to maintain additional features. I’m using the Pro level on an educational license, which gives me a 50% discount for the year. Educational institutions and non-profits are eligible for this discount. However, there are Plus and Free options below that, with some limitations to the functionality. It is likely that there are other tools that could build similar databases for low or no cost!

While this Airtable was created for a specific purpose – tracking publisher permissions requests – I could see this workflow style being useful for a variety of other project management purposes involving high numbers of records and variable timelines.

Additionally, Airtable offers other “templates” specifically tailored toward project management with checklists or calendaring functionality. These templates could be explored and utilized in a variety of library settings.

I’ve created [a demo site version of my Airtable](#) if you’d like to explore the fields, views, and so on – or please feel free to reach out to talk more! I can be reached at swolosch@umich.edu