



**Orbis Cascade Alliance  
Content Creation &  
Dissemination Program  
Digital Collections Service**

## **Batch Editing Digital Commons Records**

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Content adapted from [Reference and How-to Guides](#) created by bepress, specifically [Batch Upload, Export, and Revise](#).

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### **Overview**

The batch export and batch revise processes described below edit existing Digital Commons metadata. The batch revise process imports an Excel file, containing edited Digital Commons metadata, then overlays the existing Digital Commons metadata.. When a Digital Commons record is edited with this batch revise process, the existing reference URL and record ID for an item remain unchanged.

## Permissions

### *Permissions*

If you can see the Batch tools in the left sidebar of Digital Commons, then you have adequate permissions to complete this batch export process. If you do not see “Batch Revise Excel” in the left sidebar, your local bepress administrator can assign these permissions to you. You can also contact your bepress rep, and request these permissions.

### *Limitations*

- **Controlled lists:** Some fields, like “Document Type” and “Disciplines,” rely on controlled vocabulary lists. For these fields, specific values are required. If any fields in your spreadsheet use controlled lists, make sure to only use controlled values in these fields.
- **Modified records:** A record will fail in the batch revise process if it was edited, in Digital Commons, after you generated and downloaded your spreadsheet of records. This happens because Digital Commons considers the record in your spreadsheet to be outdated, a previous version of the record. In this case, you will need to regenerate and download the spreadsheet of records before proceeding with the batch revise process.
- **Date format:** A record will fail in the batch revise process if the record’s date field value is not formatted as a date (YYYY-MM-DD HH:MM) in your spreadsheet. When batch revising dates, make sure the dates in your spreadsheet are formatted as dates (YYYY-MM-DD HH:MM), instead of plain text.
- **Number of records:** If your collection is large (10,000+ submission), the batch export will be broken up into multiple spreadsheets (in increments of 5,000).

## Batch export

To export a Digital Commons collection’s records as an Excel spreadsheet, follow the steps below.

1. Login to your Digital Commons repository.
2. Navigate to the collection/publication to export.
3. Click “Manage Submissions” at the top of the page, and you will see the Manage Submissions page.
4. Follow the steps “To batch export” in the “Batch Export and Revise” section of Digital Commons’ [Batch Upload, Export, and Revise documentation](#).

After downloading a batch revise spreadsheet, please do not make any changes to records in Digital Commons. If you do, the Batch Revise process will fail during upload.



## *Controlled Lists*

Some Digital Commons fields, like “Document Type” and “Disciplines,” rely on controlled vocabulary lists. For these fields, specific values are required. If any fields in your spreadsheet use controlled lists, make sure to only use controlled values when you clean up these fields.

## *Date format*

The Digital Commons publication date field requires the YYYY-MM-DD HH:MM format. When cleaning up this date field, enter new dates as YYYY-MM-DD HH:MM and make sure the dates in your spreadsheet are formatted as dates (YYYY-MM-DD HH:MM), instead of plain text.

To use uncertain/approximate dates or date ranges, see the “Adding additional fields” section below.

## *Adding additional fields*

One way to conform to the Alliance’s Dublin Core Best Practices Guidelines, while retain your existing metadata, is by adding additional metadata fields that can be mapped to Dublin Core properties in the Digital Commons OAI output. These additional fields will be visible on the back-end, but they can be hidden so they do not display to your users. To add and configure additional fields, contact your bepress rep.

Additional fields may be added to accommodate the following:

- **Uncertain/approximate dates or date ranges**  
The Digital Commons “Publication Date” field requires the YYYY-MM-DD format. This works well for exact dates. But the data type of this field does not accommodate uncertain/approximate dates, which may include “?”, “~”, or “u”. Nor does it accommodate date ranges. However, you can work around this limitation by adding a text field and populating it with date ranges and/or uncertain/approximate dates. Then you can ask your bepress rep to map this new field to dc:date.
- **DCMI Type terms**  
The Digital Commons “Document Type” field uses a controlled vocabulary list. Perhaps you use this field for type values other than DCMI Type terms, and you are wondering how to include the required DCMI Type terms in your records. You can contact your bepress rep, request an additional field, and ask your rep to map this new field to dc:type. Then populate this field with the required DCMI Type terms.

## **Batch revise**

Use your cleaned up spreadsheet to batch revise fields in Digital Commons records by following the steps below:

1. Login to your Digital Commons repository.
2. Navigate to the collection/publication you would like to revise.

3. Click “Manage Submissions” at the top of the page, and you will see the Manage Submissions page.



4. Click the “Batch revise Excel” sidebar link. **Do not click the “Batch upload Excel” link** because this function will create new Digital Commons records instead of editing values in existing Digital Commons records.
5. Follow the steps “To batch revise” in the “Batch Export and Revise” section of Digital Commons’ [Batch Upload, Export, and Revise documentation](#).
6. If a record fails to batch revise, you will receive an email explaining the source of the error. Make corrections to your spreadsheet and then re-upload. If the error relates to recency of changes, you will need to export a new spreadsheet, clean up, and then upload again.

### Check the status of a batch revision

The batch status tool stores information about your batch revisions for 30 days. You can use the batch status tool at any time to check the status of your batch revision. To check the status of a batch revision, follow the steps below.

1. Login to your Digital Commons repository.
2. Navigate to the collection/publication you revised.
3. Click “Manage Submissions” at the top of the page, and you will see the Manage Submissions page.
4. Click the “Batch status” sidebar link.