

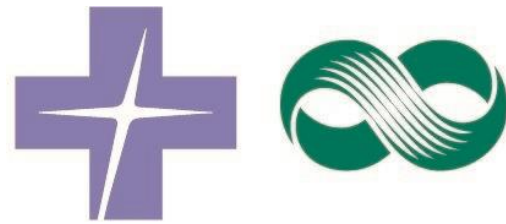
Tailoring Reports to Stakeholder Needs: Combining Data from Digital Commons Content Inventory and Dashboards

MIRL | November 17, 2022 | Jennifer Deal



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



Advocate
Aurora
Health®

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 Midwifery 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

AURORA GME

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

REQUIRED Title

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

Enter title:

REQUIRED 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 aah.org email addresses and Advocate Aurora Health as the institution for all AAH

Some challenges

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

The solution:

**Merge Content Inventory and Dashboard reports
into one cohesive report**



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Report #1: Content Inventory

Report Options

This tool allows you to generate a comprehensive overview of the content of your repository or publication. Make your selections, press Save Changes, and then generate the report of your choice. [Learn more about the Content Inventory.](#)

INCLUDE COLLECTED CONTENT IN YOUR REPORT(S)

Structure Report (Site-Level Only)

This report will contain a list of your publications (by URL) and the amount of published content in each.

Generate Structure Report

Metadata Report

This report provides options to include metadata for fields in Advocate Aurora Health Institutional Repository, plus fields used by collected content.

INCLUDE UNPUBLISHED (WITHDRAWN, REJECTED, ETC) CONTENT IN THE METADATA REPORT

Generate Metadata Report

VIEW / EDIT METADATA | **VIEW / EDIT PUBLICATIONS**

| Field Name | Display Name | Include In Report? SELECT ALL <input type="checkbox"/> |
|------------------|---------------------|---|
| abstract | Abstract | <input checked="" type="checkbox"/> |
| abstract_format | Description Format | <input checked="" type="checkbox"/> |
| acknowledgements | Cover Page Footnote | <input checked="" type="checkbox"/> |

- 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

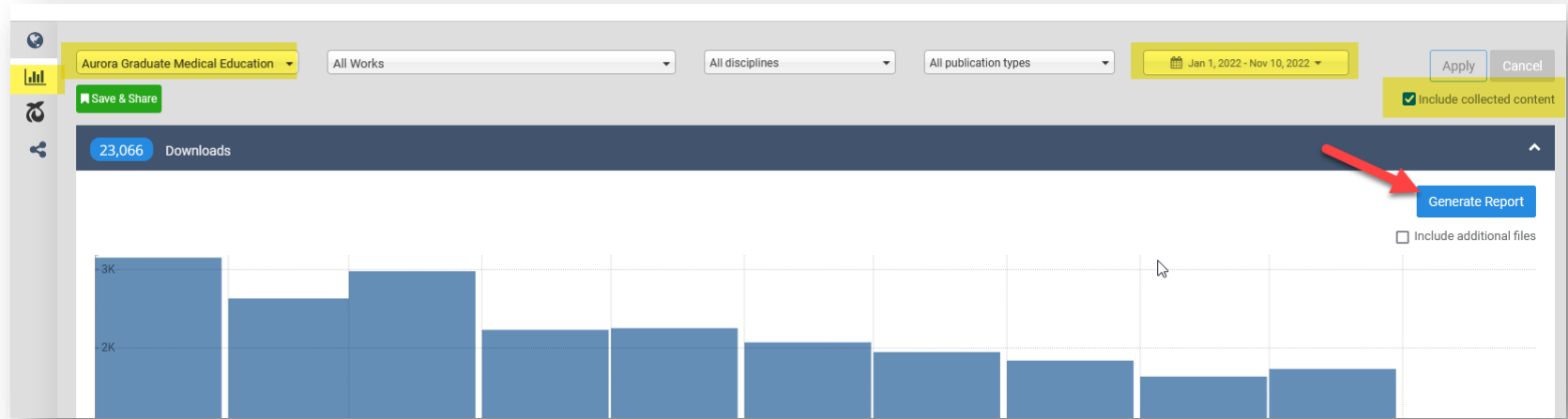
Report #1: Content Inventory

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. A table is visible with columns BC through BJ. The 'publication_date' column (BG) is highlighted in green. A 'Sort Warning' dialog box is open, asking 'What do you want to do?' with two options: 'Expand the selection' (selected) and 'Continue with the current selection'. The 'Sort' button is highlighted in blue.

| | BC | BD | BE | BF | BG | BH | BI | BJ |
|----|-------------------|--------------------|---------------|-------------------|------------------|-----------|----------|-----------------|
| 1 | presentation_note | presentation_note | preview_image | previous_versions | publication_date | publisher | pubmedid | recommended_cit |
| 2 | | Oral Presentation | | | 2021-11-08 00:00 | | | |
| 3 | | | | | 2021-01-20 00:00 | | 34317484 | |
| 4 | | | | | 2021-04-01 00:00 | | 33897963 | |
| 5 | | Presentation at: S | | | 2021-06-07 00:00 | | | |
| 6 | | Peer reviewed plat | | | 2021-05-27 00:00 | | | |
| 7 | | | | | 2022-04-01 00:00 | | 34642095 | |
| 8 | | Education infograp | | | 2015-10-01 00:00 | | | |
| 9 | | | | | 2021-11-01 00:00 | | 34719402 | |
| 10 | | | | | 2021-09-01 00:00 | | 34671536 | |
| 11 | | | | | 2021-10-21 00:00 | | 34747699 | |
| 12 | | | | | 2021-10-01 00:00 | | 34671455 | |
| 13 | | | | | 2021-10-06 00:00 | | 34693357 | |
| 14 | | | | | 2021-11-01 00:00 | | 34705698 | |
| 15 | | | | | | | | |
| 16 | | | | | | | | |
| 17 | | | | | | | | |
| 18 | | | | | | | | |
| 19 | | | | | | | | |
| 20 | | | | | | | | |
| 21 | | | | | | | | |
| 22 | | | | | | | | |
| 23 | | | | | | | | |
| 24 | | | | | | | | |
| 25 | | | | | 2022-02-01 00:00 | | 34890880 | |
| 26 | | Poster presented e | | | 2020-05-13 00:00 | | | |
| 27 | | | | | 2022-01-01 00:00 | | 34931333 | |

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

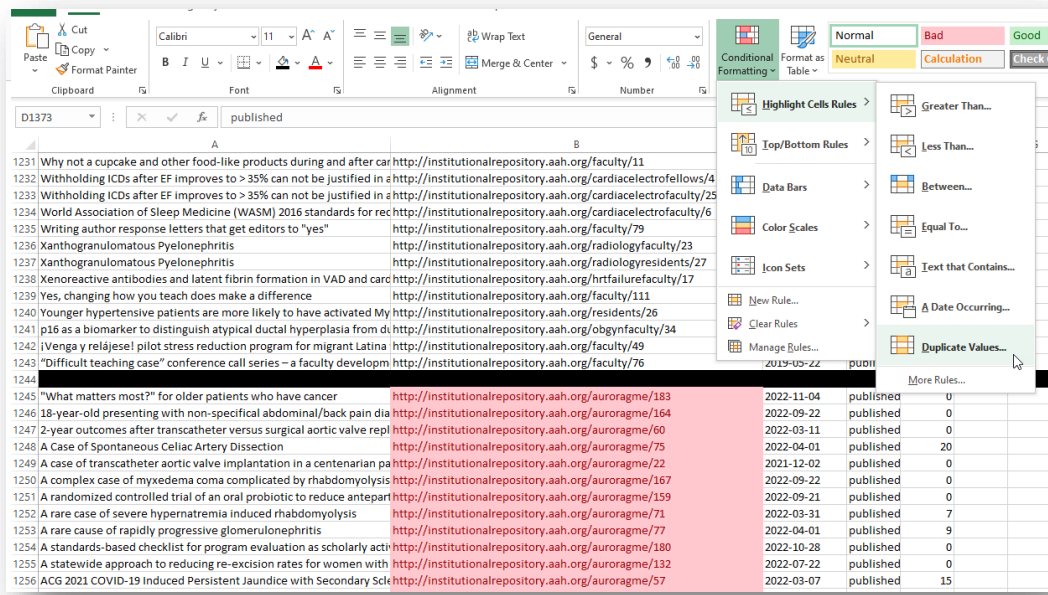
Report #2: Dashboard Downloads



- 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

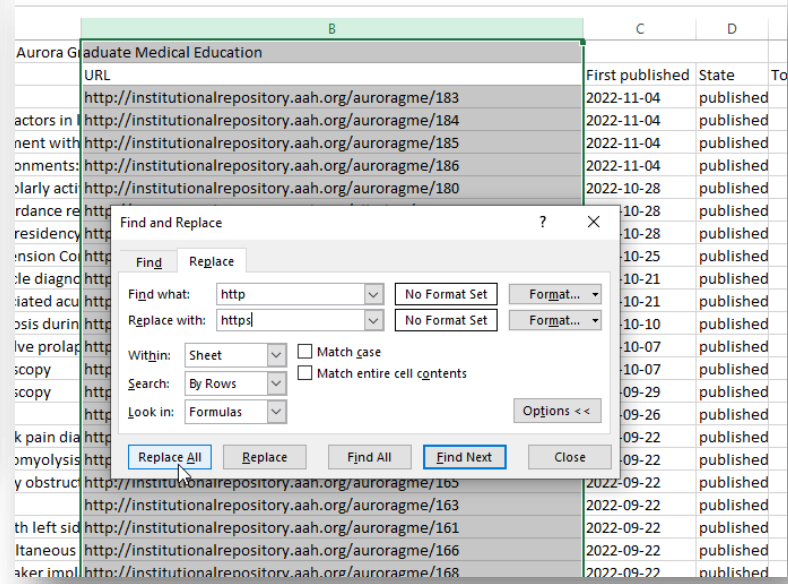
Conditional Formatting to flag duplicates



The screenshot shows the Excel ribbon with the 'Conditional Formatting' dropdown menu open. The 'Duplicate Values...' option is highlighted. The background shows a list of articles with columns for title, URL, date, and count.

| 1231 | Why not a cupcake and other food-like products during and after car | http://institutionalrepository.aah.org/faculty/11 | | |
|------|---|---|------------|-----------|
| 1232 | Withholding ICDs after EF improves to > 35% can not be justified in a | http://institutionalrepository.aah.org/cardiacelectrofellows/4 | | |
| 1233 | Withholding ICDs after EF improves to > 35% can not be justified in a | http://institutionalrepository.aah.org/cardiacelectrofaculty/25 | | |
| 1234 | World Association of Sleep Medicine (WASM) 2016 standards for rech | http://institutionalrepository.aah.org/cardiacelectrofaculty/6 | | |
| 1235 | Writing author response letters that get editors to "yes" | http://institutionalrepository.aah.org/faculty/79 | | |
| 1236 | Xanthogranulomatous Pyelonephritis | http://institutionalrepository.aah.org/radiologyfaculty/23 | | |
| 1237 | Xanthogranulomatous Pyelonephritis | http://institutionalrepository.aah.org/radiologyresidents/27 | | |
| 1238 | Xenoreactive antibodies and latent fibrin formation in VAD and card | http://institutionalrepository.aah.org/hrtfailurefaculty/17 | | |
| 1239 | Yes, changing how you teach does make a difference | http://institutionalrepository.aah.org/faculty/111 | | |
| 1240 | Younger hypertensive patients are more likely to have activated My | http://institutionalrepository.aah.org/residents/26 | | |
| 1241 | p16 as a biomarker to distinguish atypical ductal hyperplasia from d | http://institutionalrepository.aah.org/obgynfaculty/34 | | |
| 1242 | Venga y relájese! pilot stress reduction program for migrant Latina | http://institutionalrepository.aah.org/faculty/49 | | |
| 1243 | "Difficult teaching case" conference call series—a faculty developm | http://institutionalrepository.aah.org/faculty/76 | | |
| 1244 | | | | |
| 1245 | "What matters most?" for older patients who have cancer | http://institutionalrepository.aah.org/auroragme/183 | 2022-11-04 | published |
| 1246 | 18-year-old presenting with non-specific abdominal/back pain dia | http://institutionalrepository.aah.org/auroragme/164 | 2022-09-22 | published |
| 1247 | 2-year outcomes after transcatheter versus surgical aortic valve repl | http://institutionalrepository.aah.org/auroragme/60 | 2022-03-11 | published |
| 1248 | A Case of Spontaneous Celiac Artery Dissection | http://institutionalrepository.aah.org/auroragme/75 | 2022-04-01 | published |
| 1249 | A case of transcatheter aortic valve implantation in a centenarian pa | http://institutionalrepository.aah.org/auroragme/22 | 2021-12-02 | published |
| 1250 | A complex case of myxedema coma complicated by rhabdomyolysis | http://institutionalrepository.aah.org/auroragme/167 | 2022-09-22 | published |
| 1251 | A randomized controlled trial of an oral probiotic to reduce antepar | http://institutionalrepository.aah.org/auroragme/159 | 2022-09-21 | published |
| 1252 | A rare case of severe hypernatremia induced rhabdomyolysis | http://institutionalrepository.aah.org/auroragme/71 | 2022-03-31 | published |
| 1253 | A rare cause of rapidly progressive glomerulonephritis | http://institutionalrepository.aah.org/auroragme/77 | 2022-04-01 | published |
| 1254 | A standards-based checklist for program evaluation as scholarly acti | http://institutionalrepository.aah.org/auroragme/180 | 2022-10-28 | published |
| 1255 | A statewide approach to reducing re-excision rates for women with | http://institutionalrepository.aah.org/auroragme/132 | 2022-07-22 | published |
| 1256 | ACG 2021 COVID-19 Induced Persistent Jaundice with Secondary Scl | http://institutionalrepository.aah.org/auroragme/57 | 2022-03-07 | published |

Find & Replace to match URLs



The screenshot shows the Excel 'Find and Replace' dialog box. The 'Find what' field contains 'http' and the 'Replace with' field contains 'https'. The 'Look in' dropdown is set to 'Formulas'. The 'Replace All' button is highlighted.

| | B | C | D | E |
|-----------------------------------|---|-----------------|-----------|----|
| Aurora Graduate Medical Education | | | | |
| URL | | First published | State | To |
| actors in | http://institutionalrepository.aah.org/auroragme/183 | 2022-11-04 | published | |
| ment with | http://institutionalrepository.aah.org/auroragme/184 | 2022-11-04 | published | |
| onments: | http://institutionalrepository.aah.org/auroragme/185 | 2022-11-04 | published | |
| larly acti | http://institutionalrepository.aah.org/auroragme/186 | 2022-11-04 | published | |
| rdance re | http://institutionalrepository.aah.org/auroragme/180 | 2022-10-28 | published | |
| residency | | 10-28 | published | |
| nsion Co | | 10-28 | published | |
| le diagn | | 10-25 | published | |
| iated acu | | 10-21 | published | |
| osis durin | | 10-21 | published | |
| ve prol | | 10-10 | published | |
| scopy | | 10-07 | published | |
| scopy | | 10-07 | published | |
| scopy | | 09-29 | published | |
| scopy | | 09-26 | published | |
| k pain dia | | 09-22 | published | |
| omyolysis | | 09-22 | published | |
| y obstruct | http://institutionalrepository.aah.org/auroragme/165 | 2022-09-22 | published | |
| | http://institutionalrepository.aah.org/auroragme/163 | 2022-09-22 | published | |
| th left sid | http://institutionalrepository.aah.org/auroragme/161 | 2022-09-22 | published | |
| ltaneous | http://institutionalrepository.aah.org/auroragme/166 | 2022-09-22 | published | |
| aker impl | http://institutionalrepository.aah.org/auroragme/168 | 2022-09-22 | published | |

Report #3: PlumX data

The screenshot shows the PlumX Snapshot interface for the work "Hypertrophic cardiomyopathy clinical phenotype is independent of gene mutation and mut...". The metrics are as follows:

| Metric | Count |
|--------------|--------|
| Usage | 182518 |
| Citations | 8803 |
| Captures | 14660 |
| Mentions | 340 |
| Social Media | 14593 |

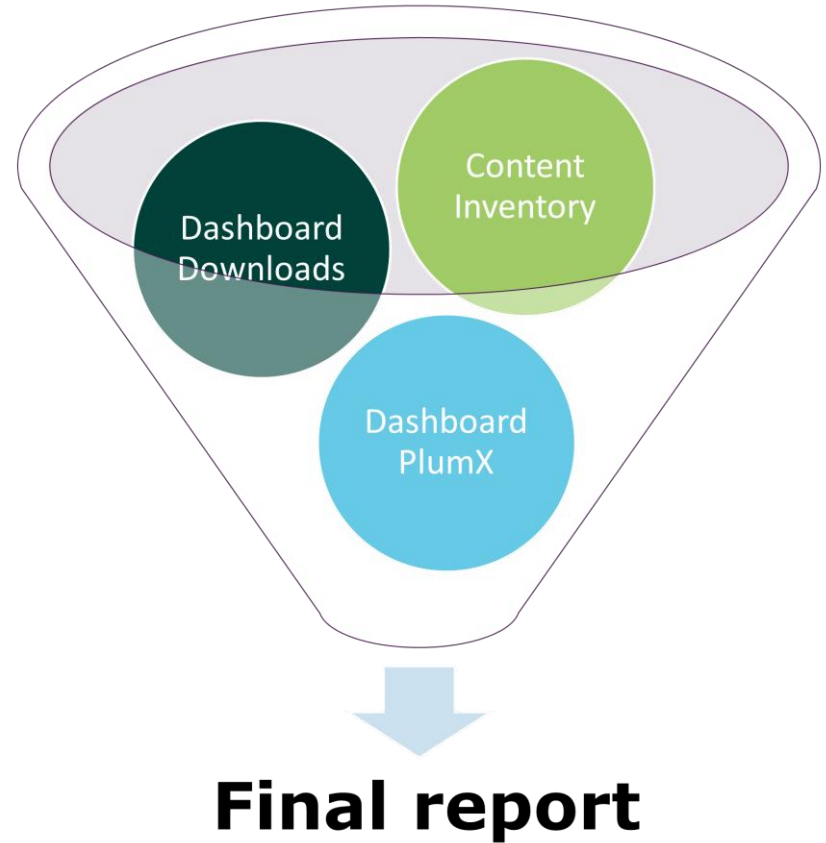
The PlumX Metrics table below shows the following data:

| Works | Usage | Citations | Mentions | Captures | Social Media |
|--|-------|-----------|----------|----------|--------------|
| Hypertrophic cardiomyopathy clinical phenotype is independent of gene mutation and mut... | 10731 | 40 | 0 | 137 | 41 |
| Hypertrophic cardiomyopathy clinical phenotype is independent of gene mutation and mut... | 10731 | 40 | 0 | 136 | 41 |
| Normal diameter of the ascending aorta in adults: the impact of stricter criteria on subjects... | 10058 | 0 | 0 | 0 | 0 |

- 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

| 1 | Citation | Web Ads | Document Type | Publication date | Submission date | Total Downloads | PlumX Usage | PlumX Citations | PlumX Captures | PlumX Mentions | PlumX Social Media | Program groups represented | Uploader email | abstract | abs |
|----|---|--------------------|------------------|------------------|-----------------|-----------------|-------------|-----------------|----------------|----------------|--------------------|----------------------------|--------------------------|----------------------|-----|
| 2 | Camara R, Matei N, Zhang JH. Evolution of the | PMID Articles | article | 2021-05-01 00:00 | 2022-02-18 | 0 | 0 | 0 | 0 | 0 | 0 | Aurora Diagnostic R | camille.dykas@aah.org | While the time win | htr |
| 3 | Ni A, Sawlani R, Shahir K. Demystifying Air Tra | Conference Preser | oralpresentation | 2021-05-01 00:00 | 2022-02-23 | 6 | 27 | 0 | 0 | 0 | 0 | Aurora UW Diagnos | camille.dykas@aah.org | | htr |
| 4 | Leschke J, Shahir K, Sawlani R. CT Findings of | Other Presentation | oralpresentation | 2021-05-01 00:00 | 2022-03-10 | 13 | 32 | 0 | 0 | 0 | 0 | Aurora UW Diagnos | camille.dykas@aah.org | | htr |
| 5 | Bowers RC, Korman ST, Thompson MA, Sana | Other Articles | abstract | 2021-05-01 00:00 | 2022-06-28 | 0 | 12 | 0 | 0 | 0 | 0 | Aurora UW Comple | samantha.loster@aah.org | | htr |
| 6 | Sharma K. Brain fog: Understanding the neuroc | Conference Preser | oralpresentation | 2021-06-26 00:00 | 2022-09-21 | 3 | 10 | 0 | 0 | 0 | 0 | Aurora UW Hospice | kavita.sharma@aah.org | COVID 19 | htr |
| 7 | Brooks J, MacDonald W. Anterior Superior Iliac | Other Articles | casereport | 2021-06-30 00:00 | 2022-02-24 | 0 | 4 | 0 | 0 | 0 | 0 | Aurora UW Diagnos | camille.dykas@aah.org | | htr |
| 8 | Abstract 2618: Staged analysis of standard of c | Other Articles | abstract | 2021-07-01 00:00 | 2022-01-19 | 0 | 16 | 0 | 0 | 0 | 23 | Oncology, surgonct | jannette.bradley@aah.org | | htr |
| 9 | Kebede K, Yifra B, Nichols C. Shooting suboxo | Conference Preser | poster | 2021-08-01 00:00 | 2022-03-31 | 291 | 477 | 0 | 0 | 0 | 0 | Aurora Internal Med | ellie.lehmann@aah.org | | htr |
| 10 | Sharma K. Post COVID-19 neurological complic | Conference Preser | oralpresentation | 2021-08-10 00:00 | 2022-09-21 | 3 | 7 | 0 | 0 | 0 | 0 | Aurora UW Hospice | kavita.sharma@aah.org | management of | htr |
| 11 | Sulemanjee NZ, Walczak S, Perez Moreno AC, | Other Articles | article | 2021-08-31 00:00 | 2022-09-02 | 0 | 0 | 0 | 0 | 0 | 0 | Aurora UW Heart F | jennifer.deal@aah.org | Objective: The | htr |
| 12 | Major D, Onkiso M, Boujelbane L. A rare case | Conference Preser | poster | 2021-09-01 00:00 | 2022-03-31 | 7 | 22 | 0 | 0 | 0 | 0 | Aurora Internal Med | ellie.lehmann@aah.org | | htr |
| 13 | Mundt D, Buggy B. Abdominal pain as the pres | Conference Preser | poster | 2021-09-01 00:00 | 2022-03-31 | 6 | 18 | 0 | 0 | 0 | 0 | Aurora Internal Med | ellie.lehmann@aah.org | | htr |
| 14 | Moges F, Biswas A. Metastatic Lung Cancer P | Conference Preser | poster | 2021-09-01 00:00 | 2022-03-31 | 6 | 12 | 0 | 0 | 0 | 0 | Aurora UW Internal | ellie.lehmann@aah.org | | htr |
| 15 | Siddiqui AA, Biswas A. Renal-limited PR-3 anti | Conference Preser | poster | 2021-09-01 00:00 | 2022-03-31 | 12 | 15 | 0 | 0 | 0 | 0 | Aurora UW Internal | ellie.lehmann@aah.org | | htr |
| 16 | Moges F, Biswas A, Allaqaband S. Transcathet | Conference Preser | poster | 2021-09-01 00:00 | 2022-03-31 | 4 | 22 | 0 | 0 | 0 | 0 | Aurora UW Cardiol | ellie.lehmann@aah.org | | htr |
| 17 | Kapapadi A, Kostopoulos L. A Case of Spontan | Conference Preser | poster | 2021-09-01 00:00 | 2022-04-01 | 20 | 43 | 0 | 0 | 0 | 0 | Aurora Internal Med | ellie.lehmann@aah.org | | htr |
| 18 | Scheel J, Boujelbane L. A rare cause of rapidl | Conference Preser | poster | 2021-09-01 00:00 | 2022-04-01 | 9 | 23 | 0 | 0 | 0 | 0 | Aurora UW Internal | ellie.lehmann@aah.org | | htr |
| 19 | Gill B, Goldman A. Anti-Synthetase Syndrome | Conference Preser | poster | 2021-09-01 00:00 | 2022-04-01 | 5 | 11 | 0 | 0 | 0 | 0 | Aurora UW Internal | ellie.lehmann@aah.org | | htr |
| 20 | Hardilo H, Ogemdi Isiguzo C, Leybishkis B. Dia | Conference Preser | poster | 2021-09-01 00:00 | 2022-04-01 | 9 | 19 | 0 | 0 | 0 | 0 | Aurora UW Internal | ellie.lehmann@aah.org | | htr |
| 21 | Hartlaub J, Simpson D, Rohrer A, Hafemann S, | Other Presentation | oralpresentation | 2021-09-23 00:00 | 2022-01-18 | 1 | 55 | 0 | 0 | 0 | 0 | Aurora UW Family | deb.simpson@aah.org | in clinical sites is | htr |

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

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.
2. Keep old reports for reference.
3. Most importantly, keep detailed notes for yourself.

Contact Info

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