

Publication Manager User Manual

University of Colorado Cancer Center

Purpose:

The Publication Manager software was designed to help publication specialist to gather publication information from PubMed for Cancer Center members and integral to automatically generate reports to NIH and get statistics. The Publication Manager ensures that we extract a complete and accurate set of information for each researcher for generating reports.

The Publication Manager site (11 modules):

1. Find all publications for each researcher in any date range, and retrieve a set of information for each publication. Information includes:
 - a. Article title.
 - b. Author list.
 - c. Abstract.
 - d. Journal title.
 - e. Journal abbreviation.
 - f. Publication type.
 - g. Issn.
 - h. Volume.
 - i. Issue.
 - j. Pages.
 - k. Publication time in various forms.
 - l. PMID.
 - m. PMCID
 - n. Note: we can specify the article title to retrieve this individual publication
 - o. Note: we can specify a member's name to retrieve publications
 - p. Note: we can specify a program to retrieve publications for all its members.
 - q. Note: we can retrieve publications for all members in all programs.
 - r. Member's status will affect retrieving. The member status and the Start and End date can determine which members' publications can be retrieved from PubMed.
2. Provide tools to identify if the publication is from member of UC Cancer Center.

Remember, during retrieving, we could get big number of publications that are not ours.

 - a. For each member, easy to gather all similar author names.
 - b. Let publication specialist to identify Cancer Center members by
 - i. Compare full name including mid initials.
 - ii. System can search article's address, if address contains words of Colorado, Denver, or Aurora, it might from our member.
 - iii. Easily open article pages in PubMed to read abstract to see if the topic is close to our research topics.

- iv. In difficult situations, let program leader to make judgement.
- 3. System automatically process imported publications to gather following information:
 - a. Two different well formatted author lists according to report requirements from NIH.
 - b. A well formatted article title according to report requirements from NIH.
 - c. Specify the programs that publication belongs to.
 - d. Specify collaborations categories for each publication and each program.
 - e. Publication date calculate from all very different publication time format.
 - f. Full text URL if any.
- 4. Publication specialist manually process imported publications to gather following information:
 - a. Confirmation information according to full name comparison.
 - b. Confirmation information according to article address comparison.
 - c. Final confirmation information.
 - d. Focus group information in program.
 - e. Shared resources used by the publication.
 - f. Citation number of articles at current time.
- 5. Publication specialist can manually add/delete publications by entering all publication information. Publication specialist can manually edit publication information
- 6. Publication specialist can use the system to generate reports according to the requirements from NIH. Can generate:
 - a. Reports for each program in any time range.
 - b. Report for each researcher in any time range.
 - c. All the reports can have following options:
 - i. Only report those with obvious focus group or no any focus group is suitable.
 - ii. With/without institution information.
 - iii. With/without article abstract.
 - iv. With/without PMID.
 - d. Member's status will affect the report. The member status and the Start and End date can determine which members' publications can be reported.
- 7. Publication specialist can generate statistics on:
 - a. Number of publications in any time range.
 - b. Cross program publications.
 - c. Publication types.
 - d. Citations.
 - e. All of above statistics can report for program or for member.
 - f. Shared resources used.
 - g. Number of publication in all journals.
- 8. To help publication specialist to process publications, the system has Inventory module that list publications:
 - a. Review/Editorial.
 - b. Not Cancer Related
 - c. Pubs Missing Pub Year Or Month

- d. Missing Final Authorship
 - e. Pubs That Have No PMCID
 - f. No Focus Group Set
 - g. All above can list by program or member
 - h. Shared Resources for the Program or Member
- 9. To integrate to EndNote, the system can export all data in Publication Manager to EndNote.:
- 10. To help publication specialist to display publication, the system has a Quick Search module that can search publication in our database by:
 - a. PMID
 - b. PMCID
 - c. Last name
 - d. Whole or partial article title
- 11. The system has System Setting module that can set:
 - a. Focus Group for each program.
 - b. Program Leader
 - c. Shared Resources
 - d. Member
 - e. Program
 - f. Institution
 - g. Member Status
 - h. Member Program
 - i. Member Institution

Configuring the Publication Manager:

Tables need to be pre-loaded:

- 1. L_Role
- 2. L_Yes_No
- 3. L_Client_Status
- 4. L_Programmatic
- 5. Pre-load one Publication specialist with username/password as admin/admin.

Tables need to be loaded by Publication specialist before running the system:

- 1. Member
- 2. L_Program with activated date/deactivated date
- 3. L_Institution
- 4. Client_Status with status code and start date/end date
- 5. Client_Program with start date/end date, primary or not
- 6. Client_Institution with start date/end date, primary or not
- 7. L_Focus_Group
- 8. L_Shared_Resource

9. Program_Leader

User Roles:

1. Public.
 - Read informational pages (not created yet).
2. Member.
 - Can do all things that Public role can do.
 - In Quick Search page, can search his/her publications.
 - In Retrieve Publication page, can retrieve his/her publication from PubMed.
 - In Process Membership page, can specify him/her Cancer Center Membership.
 - In Process Publication page, can issue an order to process his/her publications (processing will do the following automatically).
 - Assign programs to publications.
 - Format author list with program names.
 - Format author list with program names and institution.
 - Format article title.
 - Get programmatic information.
 - Get full text URL if it has PMCID.
 - Make publication date and ePub date for report use.
 - Confirm his/her authorship.
 - In Set Authorship page, can set authorship of his/her publications.
 - In Set Full Text page, can set address (Internet or school network) of full text of his/her publications.
 - In Add Pub page, can add his/her publications manually.
 - In Edit Pub page, can edit information of his/her publications manually.
 - In Delete Pub page, can delete his/her publications.
 - In Report page, can get various report of his/her publications.
 - In Statistic page, can read publication statistics by programs and by members:
 - Publications.
 - Cross Program Publications.
 - Publication Types.
 - Citations.
 - Shared Resources used by publications.
 - Publication in all Journals.
3. Program Leader.
 - Can do all things that Member role can do for specific member.
 - Can search and do all things that Member role can do for all members in his/her program.
 - In Set Focus Group page, can set focus group for all publications in his/her program.
 - In Set Program page, can set programs of his/her publications.
 - In Set Shared Resources page, can set shared resources of his/her publications.
 - In Report page, can get various publication report of his/her program and members in the program.
4. Publication Specialist.
 - Can do all things that Program Leader role can do for specific program.
 - Can search and do all things that Program Leader role can do for any program.
 - Can do system settings (Add/Edit/Delete):
 - Focus Group.

- Program Leader.
- Shared Resources.

Two roles have been defined in the current release:

1. Program Leader.
2. Publication Specialist

STEP by STEP Instructions for Assembling Publication Data:

Step 1. The user opens the Publication Manager software and inputs the user name and password.

The initial screen has a place to enter the Start date and the End Date for the information to be gathered and evaluated.

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- The user enters this information and clicks 'Show Graph'. That sets the date range for the query to PubMed.gov and all subsequent screens.

Step 2. The user clicks on the 'Configuration' tab and selects 'Retrieve Publications'. This screen allows for the user to import specific Publication information or Retrieve General Publication information.

** When compiling information for the grants, our Grants Specialist choses the 'For all programs and members Get Publications' button near the bottom of the page.

- This will send the query to the PubMed.gov database and extract the information necessary. The extract takes several hours to be completed.

Step 3. The user clicks the 'Configuration' tab and selects 'Process Membership'. This screen allows the Grants Specialist to work with the publications that have been retrieved for each member.

In preparation for our annual CCSG Grant submission, the Grants Specialist uses the 'select the start letter of the last name' section.

- When she clicks the 'A' button, she will get a list of member names and a count of the names that are similar (they have the same last name and a first name that 'might' be a member).
- The user can click on a member name and see how many publications have been retrieved for the date range originally specified for each distinct name.
- The user can click on the number in the Pubs column and the specific information for the publication associated with that person will be displayed.
 - o This step is used to confirm the validity of our members' participation in the publication.
 - o The PMID number link allows the user to pull the extract and expand the Author Information. This helps determine if the member participated in the publication.
 - o The member name is highlighted in the window to help the user.
 - o The 'Check Address' button looks to confirm that there is a reference to our university.
 - ☐ If there is, the 'Yes' appears, if not, 'No' is populated.
 - o When the Grants Specialist confirms the authorship, they select 'Yes' in the Final Authorship column.
 - ☐ They can also select 'No' if they are sure the author is not our member or 'Unknown' if they are unsure.

□ By selecting anything other than Yes, the publication will not be included in summary data used to compile the grant.

o When you click on the 'Save Final Authorship' button, the system saves any changes made for that member.

** The 'Configuration' tab / 'Process Publications' button is used to pull additional data if the extracts are done incrementally. We typically do not use this feature, but can on an exception basis.

Step 4. The 'Edit Pubs / Set Authorship' has the same functionality as the 'Process Membership' tab, but allows the user to selectively choose a program, then select a member based on the program.

Step 5. The Grants Specialist then sends the link for the 'Edit Pubs / Set Focus Groups' to each Program Leader. The Program leader is then responsible for determining the appropriate category of Focus Group involvement for each publication.

- The Grants Specialist believes this is the second-most valuable component to the Publication Manager software. The ability to empower the Program Leaders to set these on their own schedule has been a huge time saver.

Step 6. The data has now been verified and key sets of information have been added. The Grants Specialist now uses the 'Reports / For EndNote' to extract the data in a format she needs to import into EndNote.

- Endnote helps the Grant Specialist organize the data for the CCSG submission formatting.

Analysis Tools and Exporting:

Reports section

- Report – this query tool allows the user to extract information for various segments of the data. Queries are built to extract information by:

- o Program & Focus Group

- o Publication by Member & Focus Group
- o Report for all programs, members and publications and
- o Report that can be isolated to Shared Resource teams
- Publication Inventory – allows the user to select a program and a member to see publications that have been categorized as:
 - o Review/ Editorial
 - o Not Cancer Related
 - o Pubs Missing Pub Year
 - o Missing Final Authorship
 - o Pubs that Have No PMCID
 - o No Focus Group Set
 - o Shared Resources for the Program or Member
 - o Or Program Pubs for the Shared Resource
- For EndNote – this is the format that allows the data to be transferred to the software we use to format the CCSG
- For PMID CSV File – This allows the user to select a specific PMID and produce a CSV file for export.

Statistics section (each option allows selection by Program or Member)

- Publications by Program – Summary level data in table and graph formats summarizing the number of publications by program.
 - o User can click on a program and get details about which members have accounted for how many publications.
 - o Clicking on a member provides a breakdown of which calendar year the publications were published in.
- Cross Prog Pubs by Program – Summary-level data in table and graph formats summarizing the number of publications that included other programs/ by program
- Publication Type by Program – Summary-level data in table format summarizing the number of publications by the Publication Type by program.

- Citations by Program – Counts the number of times a publication was cited by another researcher / by program.
- Shared Resources – Summary-level data in table and graph formats summarizing the number of publications that included shared resources by program or shared resource.
- Journals – Summary-level data in table formats summarizing the number of publications by the journal published in.
 - o User can select a journal and get of list publications.
 - o User can click on the PMID and extract a summary of the publication information

Caution: White Page Error: There may be instances where a selection results in a white page error. This does not cause any serious issue, use the 'page back' arrow and make sure all appropriate fields have been filled in correctly.