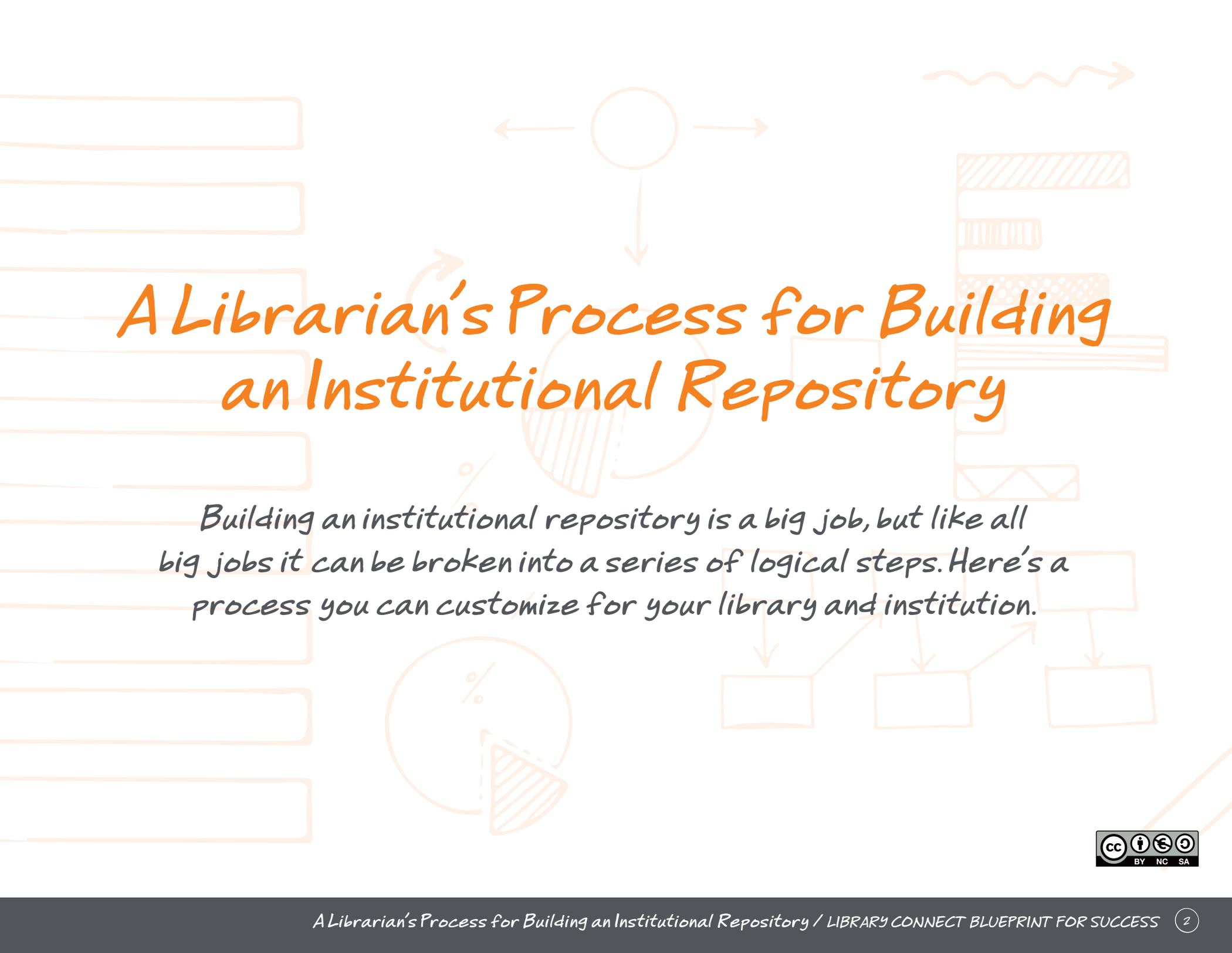


# *A Librarian's Process for Building an Institutional Repository*

LIBRARY CONNECT  
BLUEPRINT FOR SUCCESS ←

<http://libraryconnect.elsevier.com>



# A Librarian's Process for Building an Institutional Repository

*Building an institutional repository is a big job, but like all big jobs it can be broken into a series of logical steps. Here's a process you can customize for your library and institution.*

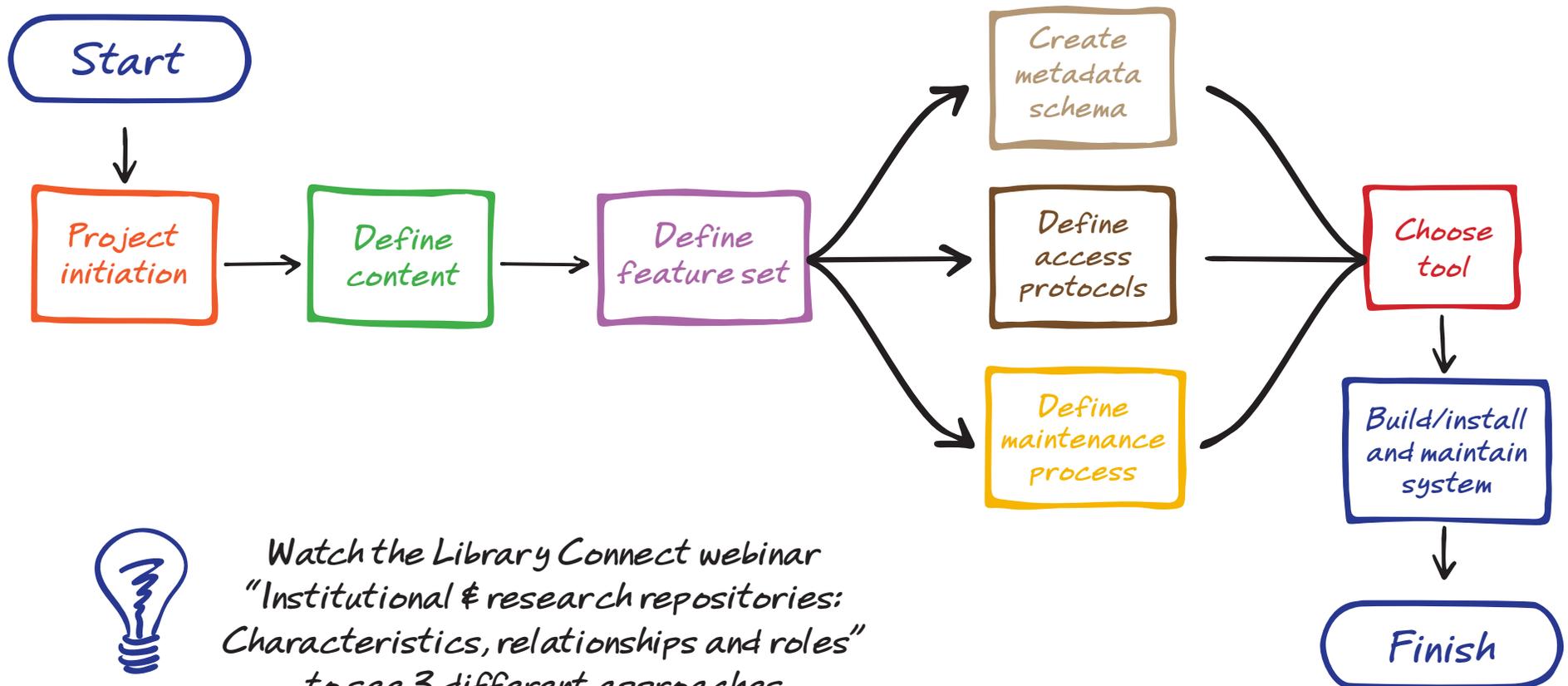
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# Table of Contents

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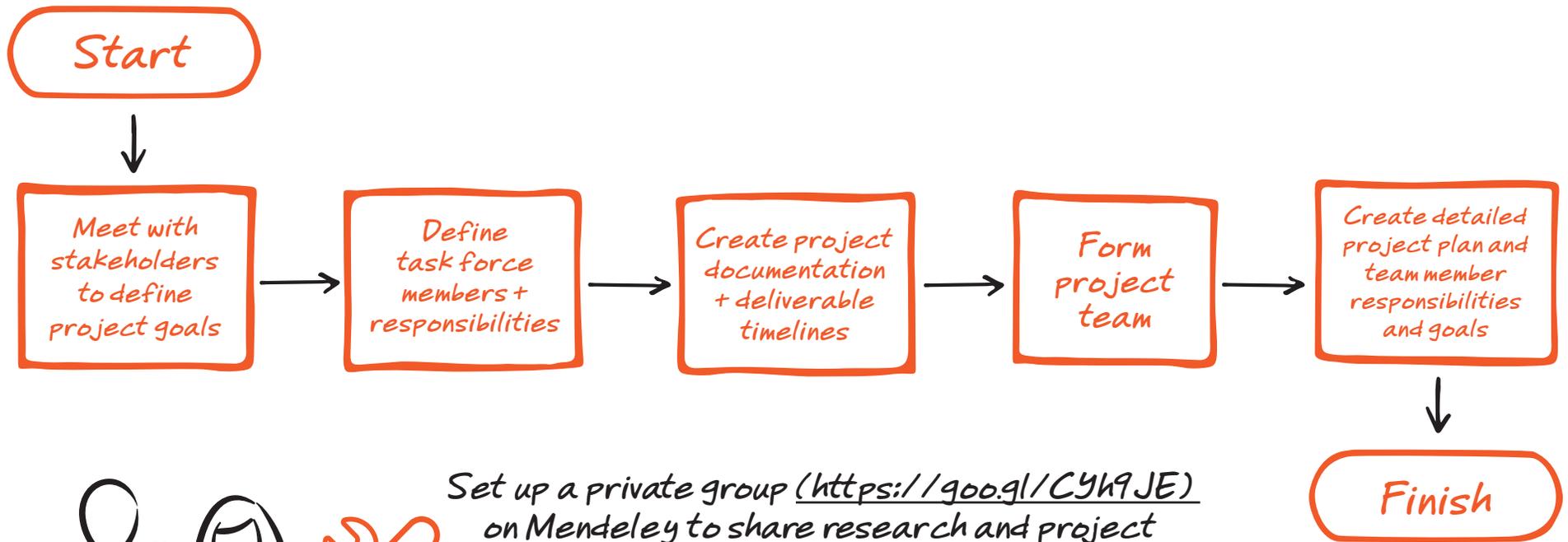
- ① *The Overall Process*
- ② *Project Initiation*
- ③ *Define Content*
- ④ *Define Feature Set*
- ⑤ *Create Metadata Schema*
- ⑥ *Define Access Protocols*
- ⑧ *Define Maintenance*
- ⑨ *Choose Tool*
- ⑩ *Author*
- ⑪ *Bibliography*

# The Overall Process



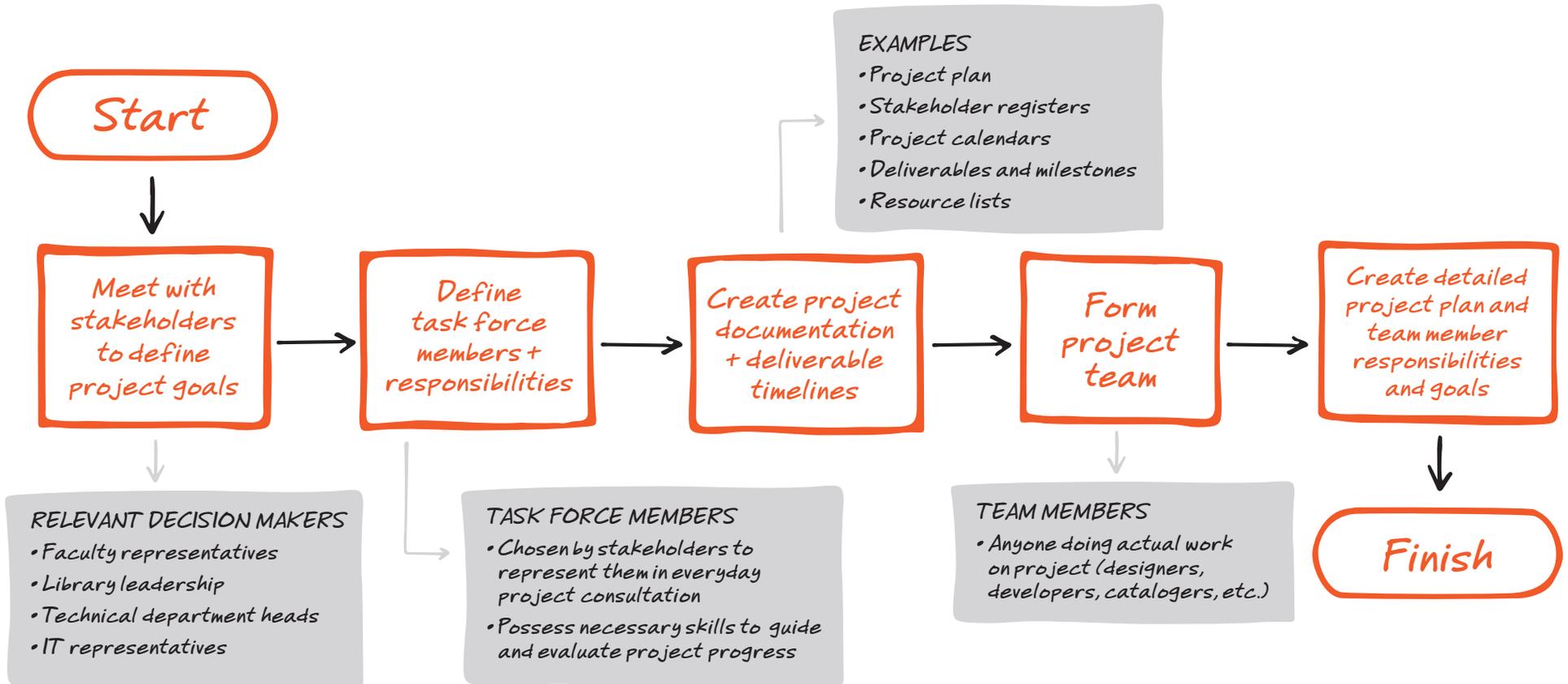
Watch the Library Connect webinar  
"Institutional & research repositories:  
Characteristics, relationships and roles"  
to see 3 different approaches  
(<http://goo.gl/wLkSH5>)

# Project Initiation

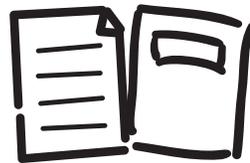
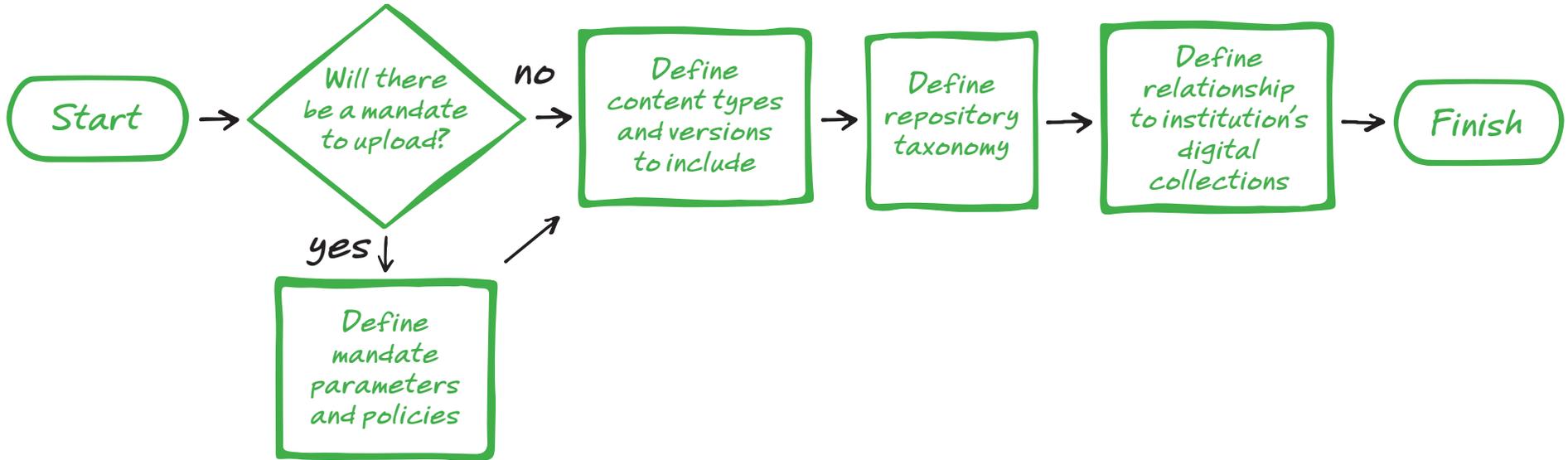


Set up a private group (<https://qoo.gl/CyH9JE>) on Mendeley to share research and project documentation, or join a public group (<https://qoo.gl/ex2Xpc>) to learn from other repository managers

# Project Initiation

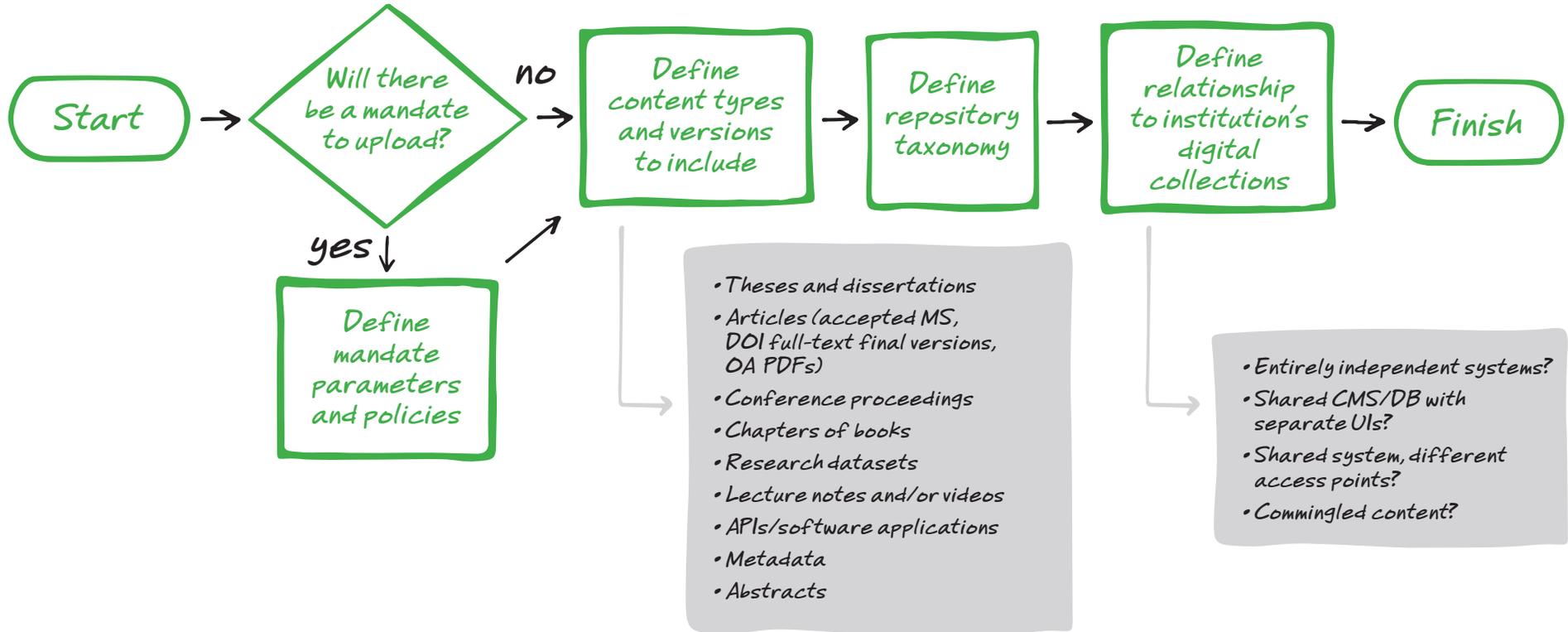


# Define Content



*Consider the authors' perspective by taking into account principles of academic freedom, reducing administrative burden and recognizing individual achievement.*

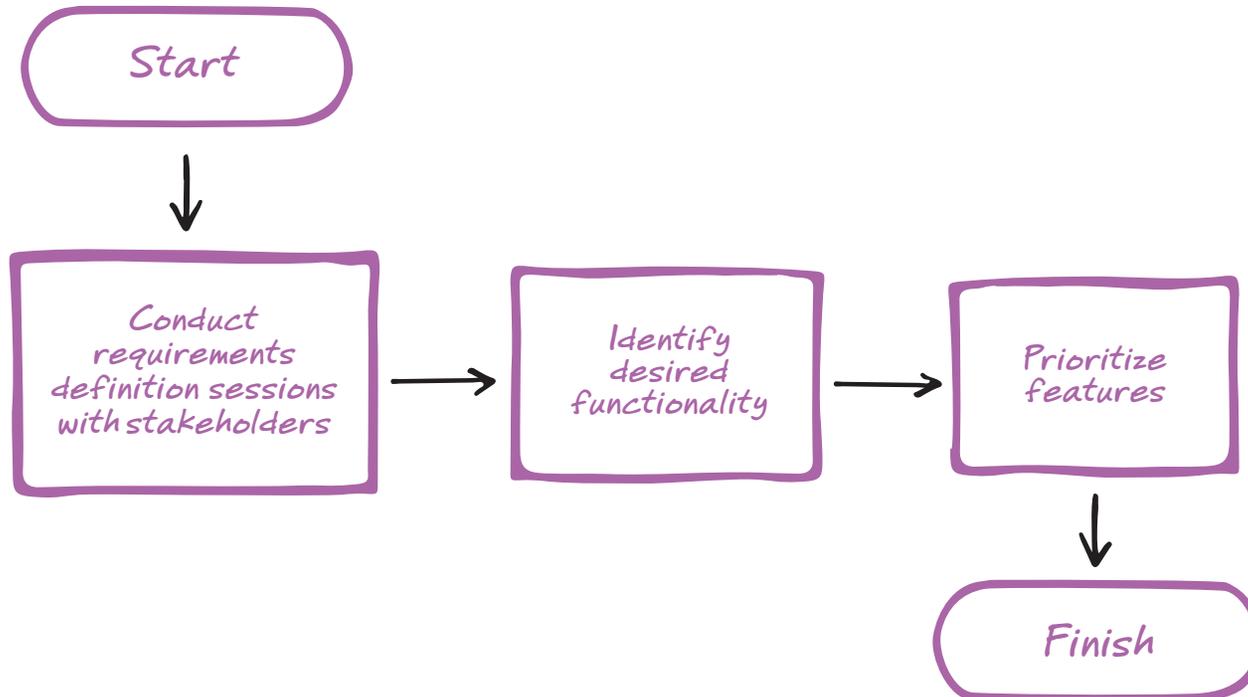
# Define Content



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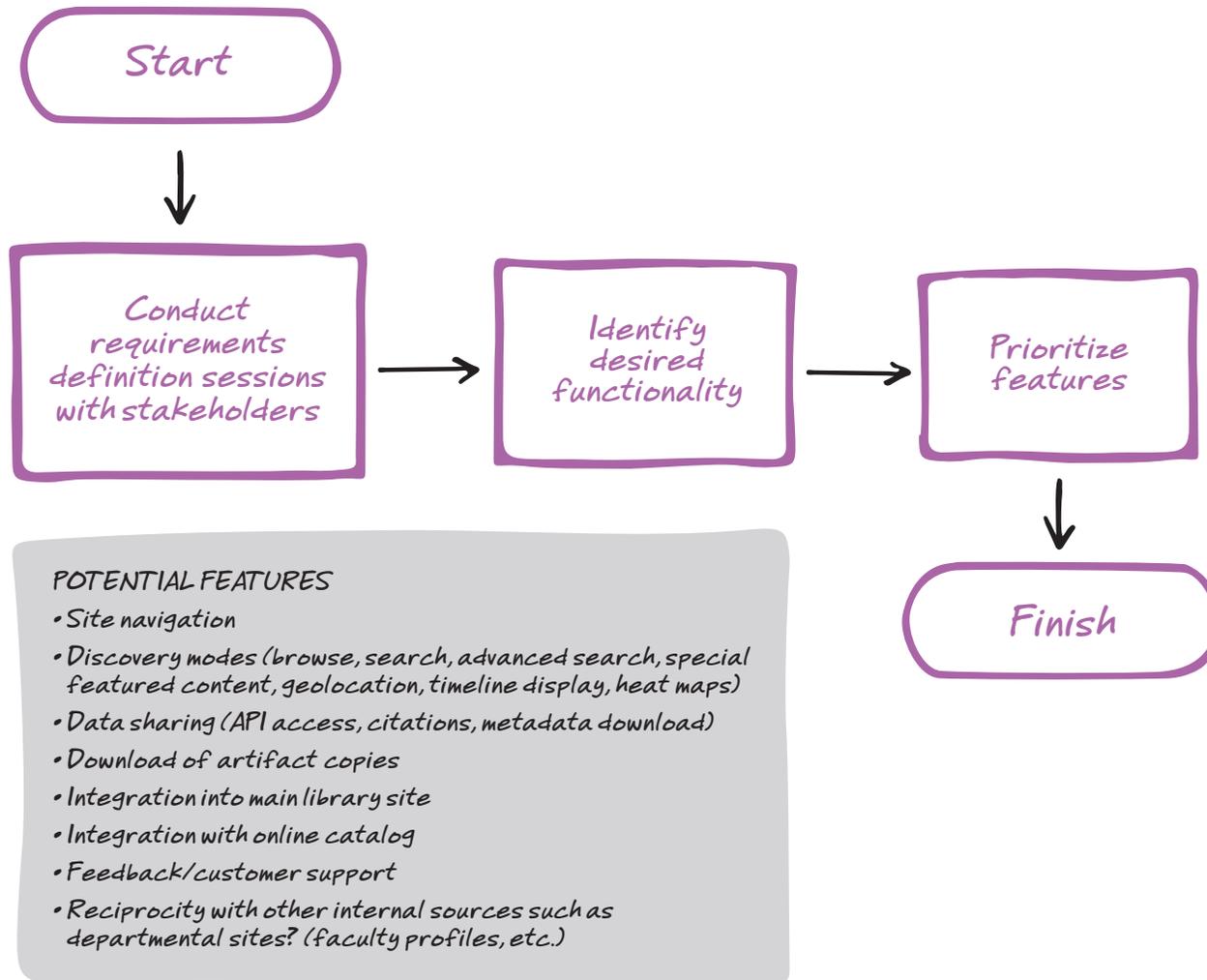
# Define Feature Set

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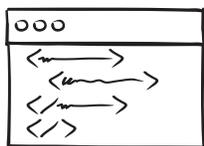
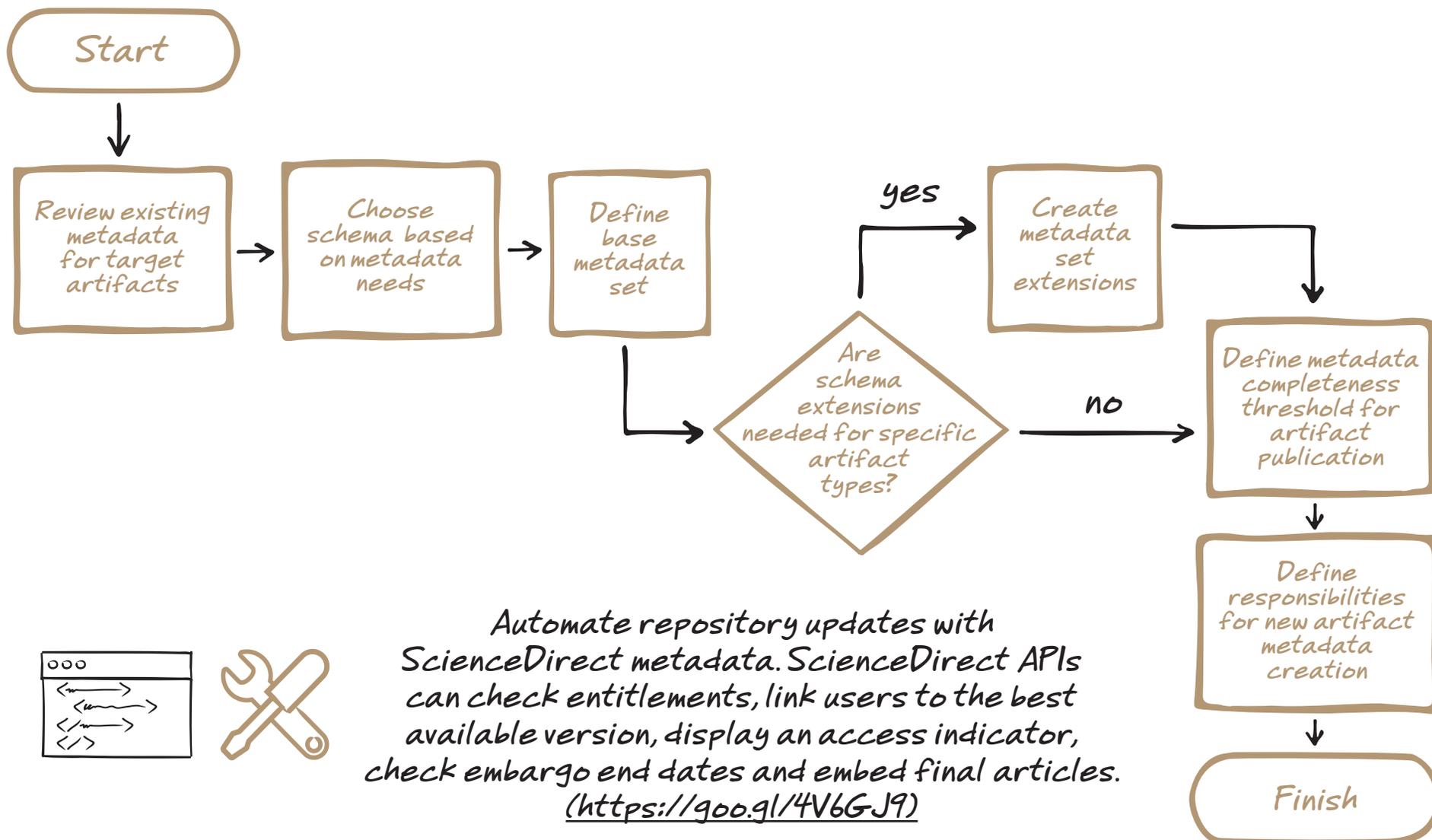


What other systems should the IR integrate with? Can it ingest APIs to help automate processes? Does it offer APIs to update departmental websites?

# Define Feature Set

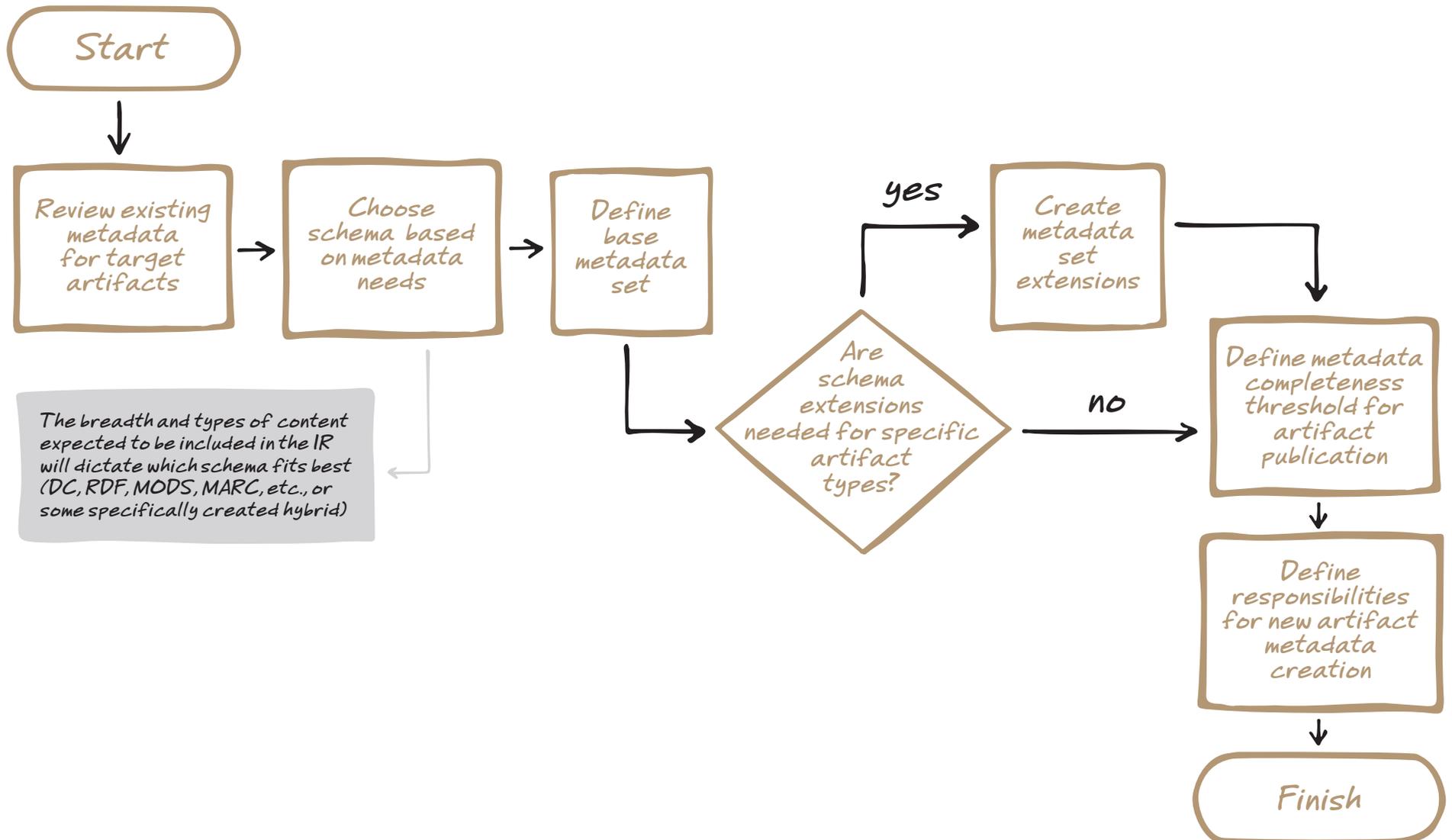


# Create Metadata Schema

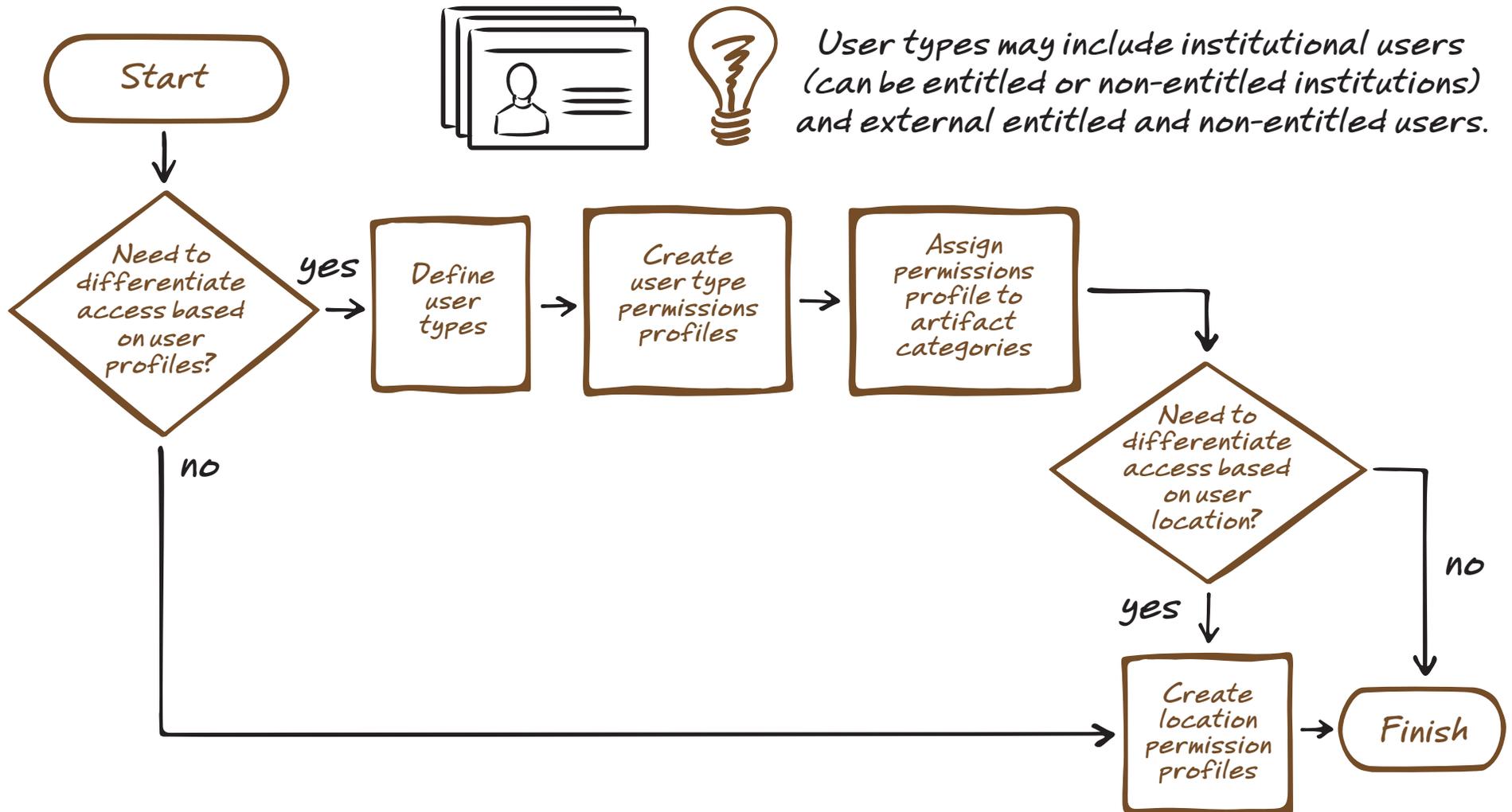


Automate repository updates with ScienceDirect metadata. ScienceDirect APIs can check entitlements, link users to the best available version, display an access indicator, check embargo end dates and embed final articles. (<https://goo.gl/4V6GJ9>)

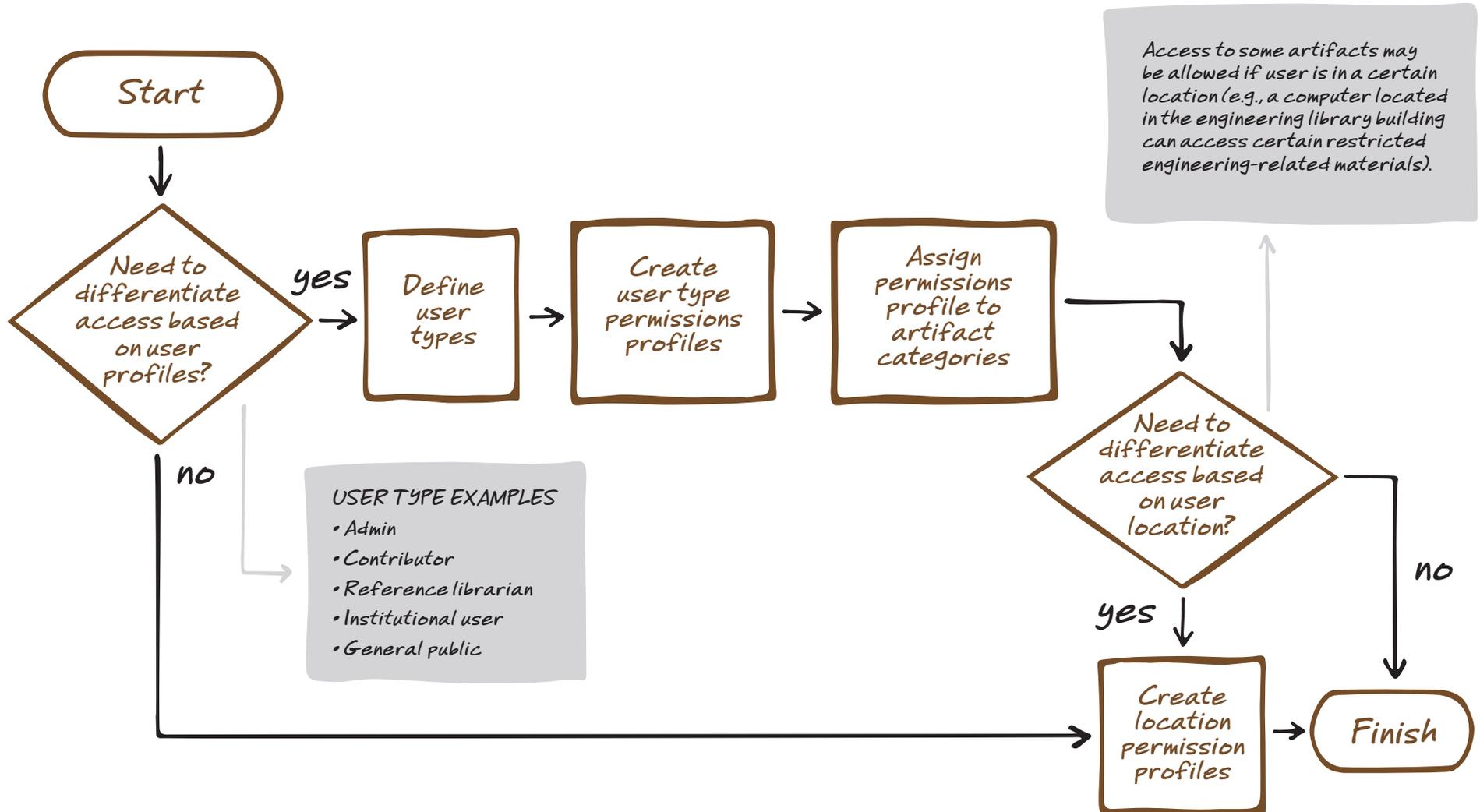
# Create Metadata Schema



# Define Access Protocols



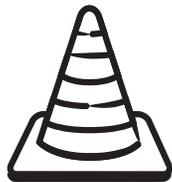
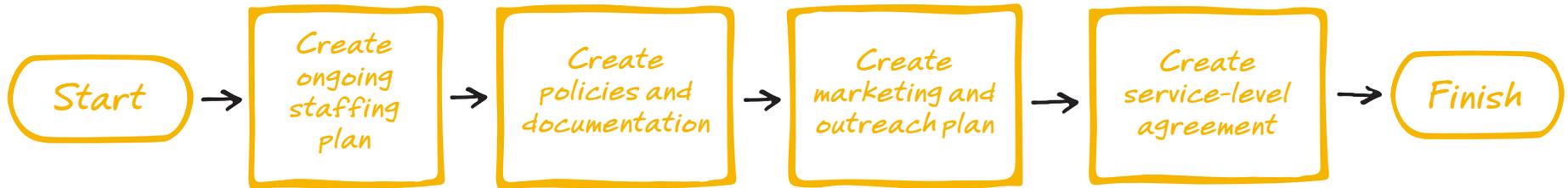
# Define Access Protocols



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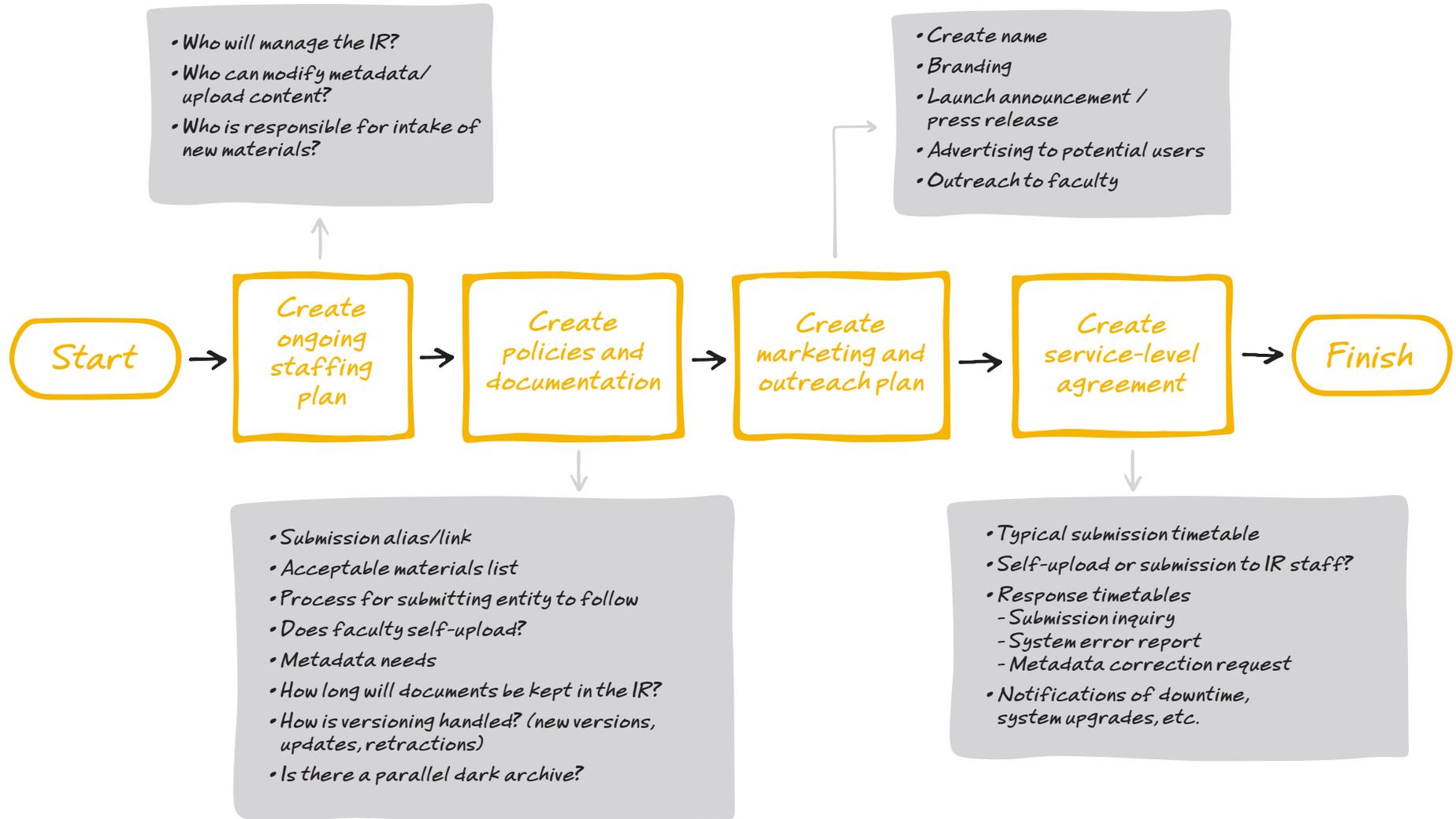
# Define Maintenance

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Institutional repositories are welcome to host research published by Elsevier under these hosting guidelines: <https://goo.gl/yndwTB>

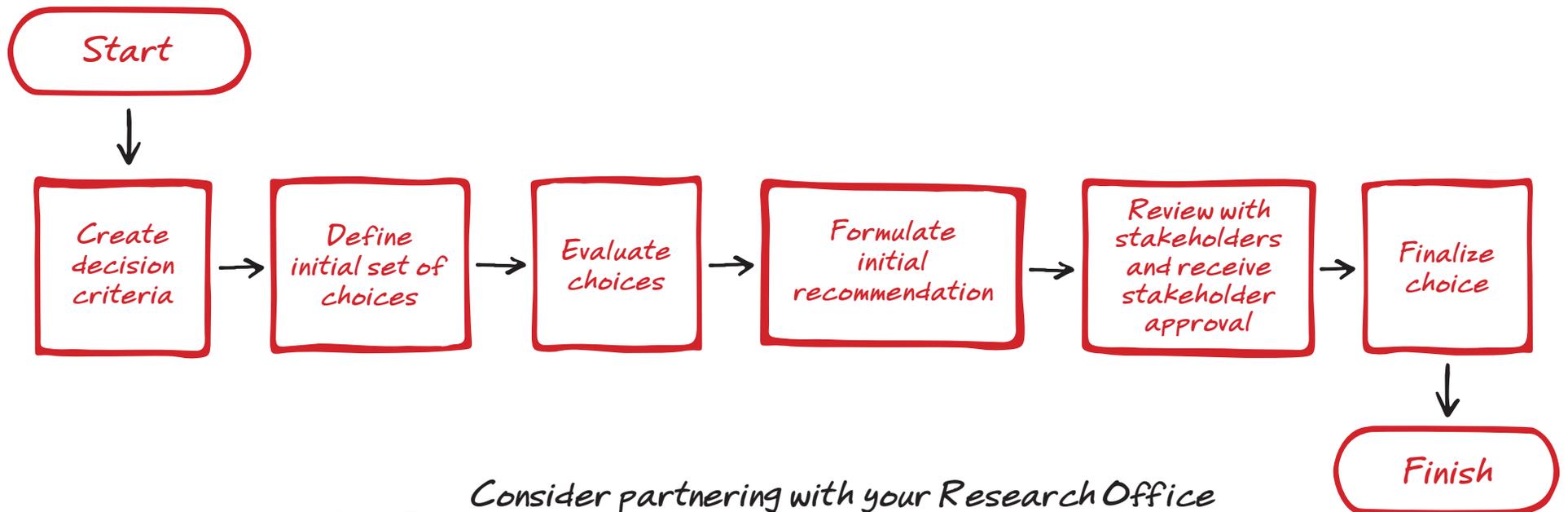
# Define Maintenance



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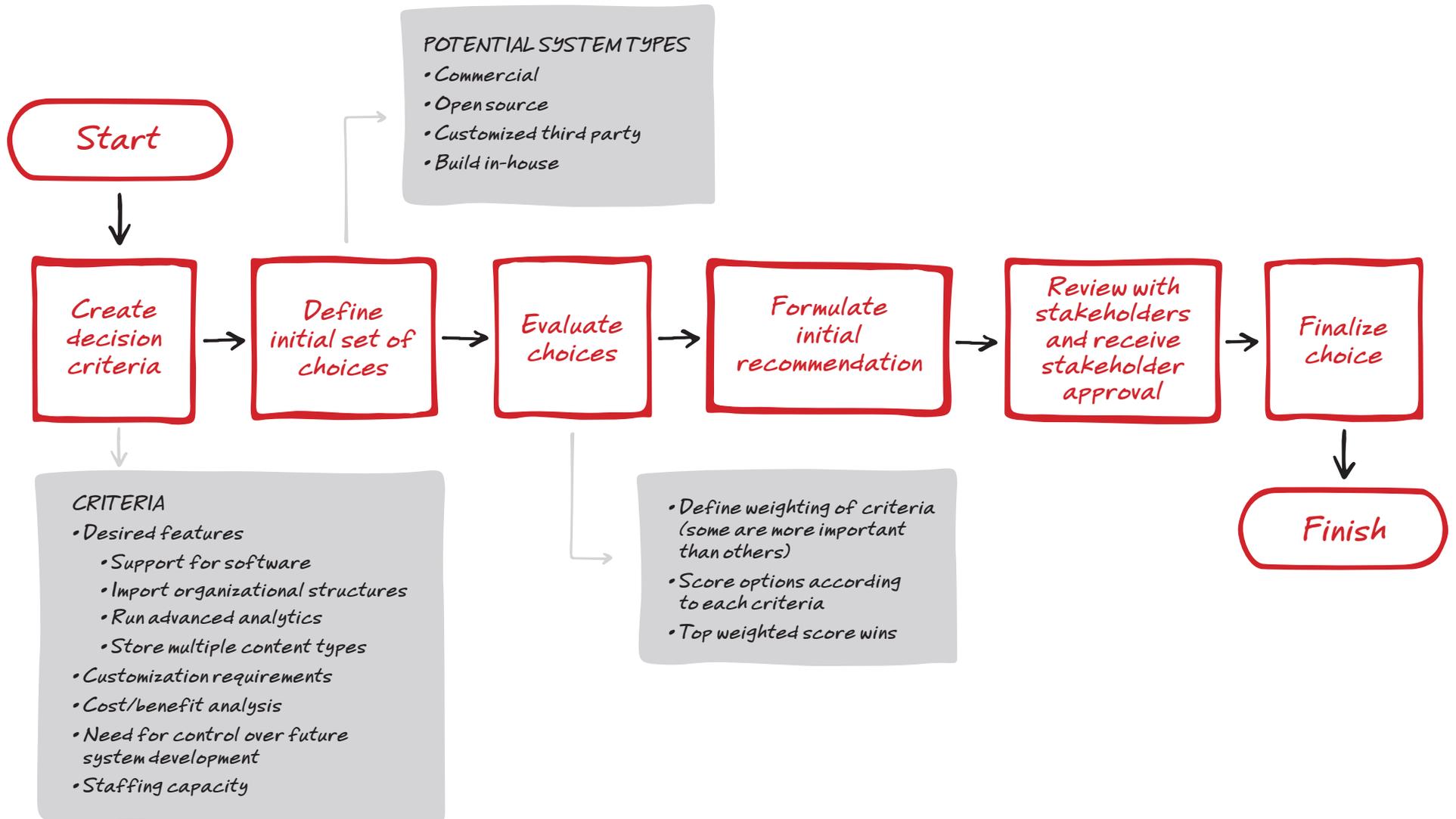
# Choose Tool

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Consider partnering with your Research Office to implement a system like Pure (<https://goo.gl/bKTWCl>) that can capture and validate research information data, generate custom reports and act as an IR.

# Choose Tool





## Leo Stezano

*Leo Stezano Consulting*

*Leo just completed a three-year engagement as Project Manager at the Avery Architecture and Fine Arts Library at Columbia University. He received his MLIS from Syracuse University in 2011. Previously he spent many years in the private sector, working in project and product management and business analysis for a variety of companies. His professional interests include digital librarianship, process optimization and innovative technical project philosophies.*

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*I'd like to specially thank Reggie Raju, Deputy Director of Client Liaison Services at the University of Cape Town, and Laurie N. Taylor, Digital Scholarship Librarian at the University of Florida, for their help while researching this project. Their expertise on institutional repositories was instrumental in putting together this guide.*

*– Leo Stezano*

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