Incubation Workshop

Megan Senseney
Janet Swatschone
Maria Bonn
University of Illinois
December 8, 2017
And you!

- Noora Al Balushi
- Rebecca Artinian-Kaiser
- Jennie Brier
- Ayana Chavis
- Laura Donnelly
- Ömür Harmanşah
- Rachel Havrelock
- Olga Herrera
- Victor Jew
- Mila Kellen Marshall
- Robyn Mericle
- teresa helena moreno
- Chelsea Ridley
- Tamara Becerra Valdez
Introduction

Writers’ Workshop meets Makerspace
<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30-9:00</td>
<td>Coffee and Login</td>
</tr>
<tr>
<td>9:00-10:15</td>
<td>Introduction to Digital Scholarly Publishing</td>
</tr>
<tr>
<td></td>
<td><strong>BREAK</strong></td>
</tr>
<tr>
<td>10:30-12:00</td>
<td>Minimum Viable Product</td>
</tr>
<tr>
<td></td>
<td><strong>LUNCH</strong></td>
</tr>
<tr>
<td>100-3:00</td>
<td>Moving Beyond the Minimum</td>
</tr>
<tr>
<td>3:00-3:30</td>
<td>Customization and Closing Discussion</td>
</tr>
<tr>
<td></td>
<td><strong>BREAK (OR BREAKAWAY)</strong></td>
</tr>
<tr>
<td>3:45-5:00</td>
<td>Open Period for Experimentation and Consultation</td>
</tr>
</tbody>
</table>
Our Values

- Collaboration
- Playfulness and tinkering
- Focus on process
- Building
“It is one thing to be able to use a particular piece of hardware or software and another thing altogether to imagine what it might do or mean if pushed beyond its typical use, or even more again to imagine what might be created in its stead. It is these latter skills that good digital humanities pedagogy must inculcate: not “how to use x tool,” though that is likely part of it, but more “understanding how x functions, delineating its affordances and limitations, and then imagining y or z.”

(Cordell 2016)
A new digital scholarly publishing initiative from the University of Illinois

- Build capacity for participation in innovative publishing initiatives
- Conduct research and assessment of how emerging technologies align with the expressed needs of participating scholars
- Create a new model for the conceptual development of scholarly communication
Digital Scholarly Publishing Ecosystem

**Publishing Without Walls**
- **Advantages**
  - Open access
  - Experimental
- **Drawbacks**
  - Small
  - Low profile

**University Presses**
- **Advantages**
  - Academic
  - Prestigious
- **Drawbacks**
  - Traditional
  - Under-resourced

**Commercial Presses**
- **Advantages**
  - Well-resourced
  - Market preparation
- **Drawbacks**
  - Market-driven
  - Non-academic
"Open-access scholarship has the potential to reach a broad spectrum of potentially interested publics. We in the humanities often resist opening our work to these publics, however, fearing the consequences of such openness....

“Increasing the discoverability of scholarly work on the web, making it available to a broader readership, is a good thing, not just for the individual scholar but for the entirety of the field in which he or she works.”

Kathleen Fitzpatrick (2013)
PWW Process

A view of the publication process from the scholar’s perspective
Series

African American Studies  Humanities Without Walls
Scope
We provide scaffolding and infrastructure...

- Ongoing consultations on digital publications
- Hosted tools and platforms maintained through the University of Illinois
- A selection of templates for use in content development
- Affiliation with the PWW Global Midwest or African American Studies Series
- Publishing workflow with connections to University Presses
Content creation (e.g., developing or gathering text, images, multi-media or other resources that you intend to include in your publication)

Content management (e.g., loading content into the tool or platform of your choice, developing metadata as needed, establishing relationships between digital objects)

Design and presentation (e.g., determining layout of content and augmenting provided templates with any additional design features)
Tools and Platforms

Assessing which platform is right for you
Our Tools

Open Journal System

Omeka

Pressbooks

Scalar
Publications in the wild (Part I)

Pressbooks
- Claude Monet; The Water-Lilies: https://iopn.library.illinois.edu/pressbooks/clemenceaumonet/

Omeka
- Educating Harlem: http://educatingharlem.cdrs.columbia.edu/omeka/

Scalar
- Journal article from a special issue of American Literature: http://scalar.usc.edu/anvc/chaosandcontrol/index

OJS
- Digital Literary Studies: https://journals.psu.edu/dls/index
Pressbooks: How it works

- WordPress-based administrative modules
- Create hierarchical series of entries for book sections and chapters
- Consistent with typical monograph structures
Why Pressbooks?

Benefits

- Easy administrative interface – based on WordPress
- Quickly create a professionally typeset book
- Can export your book in the major formats
- Strong preservation and portability

Drawbacks

- Limited number of templates
- Can only incorporate limited types of media
Structure of an Omeka Site

Items ➤ Item sets ➤ Pages ➤ Sites
Why Omeka?

Benefits

- Structured platform for digital exhibitions
- Many plug-ins to extend functionality
- Widely supported
- Strong community of users

Drawbacks

- Relatively rigid site structure
- Limited site design options - Customization only possible with advanced web design skills
- Preservation and portability are a challenge
Structure of a Scalar book

Media ➔ Pages ➔ Paths ➔ Book
Why Scalar?

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Multi-media content displayed well</td>
<td>• Primarily cloud-based</td>
</tr>
<tr>
<td>• Flexible, non-linear structure</td>
<td>• Administrative dashboard is not intuitive</td>
</tr>
<tr>
<td>• Connected to multiple digital archives</td>
<td>• Visual customization requires extensive web design knowledge</td>
</tr>
<tr>
<td>• Can annotate media objects</td>
<td>• Preservation and portability is a challenge</td>
</tr>
<tr>
<td>• Community of users</td>
<td></td>
</tr>
</tbody>
</table>
Open Journal Systems

System for creating and editing your open access journal

Key:
- Journal Manager
- Editor
- Section Editor
- Reviewer
- Copyeditor
- Layout Editor
- Proofreader
- Author
- Reader

Submission:
- Author uploads file to journal Web site and enters metadata for OAI indexing

Submission Review:
- Author can track process, see files, review, revise and resubmit at editor’s request

Submission Editing:
- Authors review copyedited proofs and galleys

1. Submission Queue
- Editor assigns submission to Section editor to see through the editorial process

2. Submission Review
- a. Check submission
- b. Conduct peer review
- c. Reach editorial decision

3. Submission Editing
- a. Copyedit submission
- b. Layout of formatted galleys
- c. Proofread galleys

4. Issue Management
- a. Create issues
- b. Schedule submissions
- c. Organize Table of Contents

5. Publication
- a. Offering immediate open access or delayed open access, with subscriptions

Journal Management
- Setup and configure journal; enroll editors, reviewers, copyeditors, proofreaders.

Select Reviewers
- Editor invites reviewers from database with interests, load

Review Conducted
- Reviewer submits review and recommendation (which may be rated by editor)

Copyediting
- Layout Editor prepares galleys in HTML/PDF, PS, etc.

Proofreading

Submission Archive
- Complete record of submission process for published and declined items

Current Issue
- Items appear with Reading Tools linking to related internal and external resources

Journal Archive
- Enriching issues, with indexing by OAI search engines, as well as Google, etc.
Why OJS?

**Benefits**

- Free system for publishing an open access journal
- Built in editorial workflow system
- Large community of users
- Well indexed

**Drawbacks**

- Limited options for site design
- Administrative interface can be complex
Primary Modes of Representation

- Pressbooks: Long-form linear narratives
- Omeka: Exhibitions
- Scalar: Multi-linear narratives
- OJS: Born-digital, open access journals
The relationship between text and media

- Pressbooks: media subordinate to text
- Omeka: text describes media
- Scalar: text and media are highly integrated
- OJS: text/media expectations are a matter of journal policy
# Matching your goals to our tools

<table>
<thead>
<tr>
<th></th>
<th>Pressbooks</th>
<th>OJS</th>
<th>Omeka</th>
<th>Scalar</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learning Curve</strong></td>
<td>Low-medium</td>
<td>Medium</td>
<td>Medium-high</td>
<td>Medium-high</td>
</tr>
<tr>
<td><strong>Primary Content</strong></td>
<td>Text</td>
<td>Text</td>
<td>Text and media</td>
<td>Media and text</td>
</tr>
<tr>
<td><strong>Strengths</strong></td>
<td>Monographs and long form manuscripts; based on Wordpress</td>
<td>Hosting scholarly journals; strong user community; widely indexed</td>
<td>Online exhibitions that are best suited for text and images</td>
<td>Media-heavy projects with video and audio as well as text</td>
</tr>
<tr>
<td><strong>Drawbacks</strong></td>
<td>Limited number of typefaces; can only incorporate limited media</td>
<td>Limited options for site design; administrative interface can be complex</td>
<td>Relatively rigid structure, preservation challenges, limited site design without advanced web design skills</td>
<td>Requires advanced web design to customize noticeably; portability and preservation issues</td>
</tr>
<tr>
<td><strong>Learn more</strong></td>
<td>pressbooks.com</td>
<td>pkp.sfu.ca/ojs</td>
<td>omeka.org</td>
<td>scalar.usc.edu</td>
</tr>
</tbody>
</table>
An Exercise and Some Free Writing

Small group activity (10 minutes):

Break into groups of two or three and take one card of each color. Together, consider the following questions:

- Could this publication be print? digital? Both?
- If both, would one medium be more suitable than the other?
- If this project is suitable for digital publication, which tool(s) would you select? Why?

Free writing activity (10 minutes):

Think about your own position, research materials, and publishing goals. Consider the same questions presented above applied to your own work.
Minimum Viable Product

Demonstrating process in
the fewest possible steps
“Understanding how X functions”

Question:

- What are the fewest reasonable steps to get from registering an account to publishing something coherent?

Alternately:

- What are the most fundamental aspects of each tool?
- What does every tool have in common?
A Helicopter Tour

Objectives:

- Briefly demonstrate the backend dashboards for each tool
- Develop baseline familiarity with each interface
- Take a process from start to finish
- Feel accomplished!

This is an exercise in ignoring the bells and whistles.
Welcome to the IOPN Omeka S Sandbox admin dashboard!

**Manage Resources**
- Items (51)
- Item sets (5)
- Vocabularies (4)
- Resource Templates (1)

**Manage Sites**
- crism's sandbox
- Danny's Site
- The Alphabet
- iBlack Studies
- Medical Entomology
- Music In Conflict

[Add site]
Organize your public Catalog page.

**Show/Hide books**
To display a book in your catalog choose "Show in Catalog" under Catalog Status. To hide a book in your catalog choose "Hide in Catalog" under Catalog Status.

**Catalog sorting**
To add sorting ability, add your Tag names to your Catalog Profile page (ex: Authors, Book Genre), then add the appropriate tags to each individual book.

**Share your catalog**
The public link to your catalog page: http://pb-sandbox.library.illinois.edu/catalog/mfsense2
Shared files


- Text files for each letter
- Scanned images of books and manuscripts
- Spreadsheet with bibliographic metadata
- Supplementary files provided for further experimentation
The PWW Sandbox is an experimental space to demonstrate tools and platforms. We host our own versions of tools to:

- Maintain software with dedicated research programmers
- Protect your work on our own securely hosted servers
- Modify platforms to align with the needs of our scholars
- Develop an independent publishing ecosystem
Sandbox Caveats

- You may encounter technical bugs
- Content in the sandbox is **cleared** periodically
- If you would like to continue working with PWW following the workshop, contact the instructors for consultation and access to a more stable working environment
Hands-on: Getting Started

Pressbooks:
- Register and create a new book
- Add book-level metadata
- Upload 3-5 media objects and describe them
- Create text and integrate your media
- Publish your results

Scalar:
- Create a new book
- Add 3-5 media items
- Create a new page
- Integrate media and format page
- Launch your site

Omeka:
- Create an item set
- Add 3-5 items, describe them, and link them to your item set
- Create a site
- Create a page and add blocks
- Launch your site

OJS:
*OJS is a workflow tool more than an authoring tool. If you are interested in journal management, initial exploratory activities will be somewhat different.*
- Gather with your team
- Review the workflow illustration in your handbook
- Create “staff” assignments
- Work together to configure a new journal
LUNCH BREAK!
You earned it.
Moving Beyond the Minimum

A guide for more in depth publication development.
Debrief: 15 minutes

- What platforms did you choose?
- Did you run into problems?
- What observations do you have about the role of metadata in a digital publication?
- What observations do you have about the process of organizing your materials?
Content Management and Metadata Creation

You do it every day.
Folder hierarchies
File naming conventions
Metadata

- Metadata supports discoverability and distinguishes individual items
- Serves multiple functions:
  - Descriptive
  - Administrative
  - Structural
- There are multiple standards and authorities for metadata.
- Authors and publishers are responsible for different aspects of metadata.
- Authors attend to metadata throughout the digital publishing process.
Metadata: Descriptive

Layout  Relationships  Styling  Properties  Metadata

dcterms:abstract

dcterms:bibliographicCitation

dcterms:coverage

dcterms:date

dcterms:spatial

dcterms:subject

Metadata fields

Add additional metadata  Auto-populate fields from file

Edit Item: “Fables, and other short poems collected from...”

Date

A point or period of time associated with an event in the lifecycle of the resource.

dcterms:date

1737

Description

An account of the resource.

dcterms:description

1737
Metadata: Administrative
Metadata: Structural
Metadata Takeaways

- Metadata creation is intellectual work and warrants a critical approach
- Be mindful what, exactly, you’re describing (i.e., 1:1 principle)
- Consult with PWW on metadata strategies as needed
Digital Affordance and Increasing Complexity

Alternative modes of representation
Omeka: Everything is an item!

Items ➔ Item sets ➔ Pages ➔ Sites
People can be items
Items can be mapped
And items can describe other items
Scalar: Everything is a page!
Pages can be paths, tags, annotations, etc.

From A to Z: An Exhibit about Alphabets, Letters, & Writing
Pages are connected through relationships
Media pages may just be a pointer to an external source.
OJS: Everything is social
Social Complexity in OJS

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Abbreviation</th>
<th>Submission</th>
<th>Review</th>
<th>Copyediting</th>
<th>Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal manager</td>
<td>JM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journal editor</td>
<td>JE</td>
<td>☑</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production editor</td>
<td>ProdE</td>
<td></td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Section editor</td>
<td>SecE</td>
<td>☑</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Copyeditor</td>
<td>CE</td>
<td></td>
<td></td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td>Designer</td>
<td>Design</td>
<td></td>
<td></td>
<td></td>
<td>☑</td>
</tr>
<tr>
<td>Funding coordinator</td>
<td>FC</td>
<td>☑️</td>
<td></td>
<td>☑️</td>
<td></td>
</tr>
<tr>
<td>Indexer</td>
<td>IND</td>
<td></td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>Layout Editor</td>
<td>LE</td>
<td></td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>Marketing and sales coordinator</td>
<td>MS</td>
<td></td>
<td></td>
<td>☑️</td>
<td></td>
</tr>
<tr>
<td>Proofreader</td>
<td>PR</td>
<td></td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>Author</td>
<td>AU</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
</tbody>
</table>
A word on IP

- Do you own the copyright for the materials you are using?
- Are the materials in the public domain or flexibly licensed?
- Do you have explicit permission to use these materials?
- Do you have explicit permission to use these materials digitally?
- Can you use use materials under copyright without permission?
- How do you want other people to use the materials you own?

If you don’t know the answer to these questions or aren’t sure how to go about answering these questions, consult Scholarly Communication and Publishing:

https://www.library.illinois.edu/scp/
A word on preservation

As your structures and media sources increase in complexity,

your digital publication becomes increasingly difficult to preserve in its original form.

http://publishingwithoutwalls.illinois.edu/preservation/
Hands-on: Increased complexity

Pressbooks:
- Try importing a Word document
- Experiment with footnotes and references
- Experiment with different kinds of media
- Develop a strategy for external links
- Organize the structure of your book

Omeka:
- Create a non-media item (concept, person, event, etc.)
- Use that item to describe another item
- Create detailed item-level metadata
- Experiment with mapping
- Build more complex pages
- Develop navigation strategy

Scalar:
- Import media from external sources
- Create more pages with different features
- Experiment with paths, tags, and annotations
- Explore the widget features for timelines, maps, and visualizations

OJS:
*OJS is a workflow tool more than an authoring tool. If you are interested in working through this activity, you’ll need at least two people and up to four email accounts.*
- Submit an article
- Manage the review process
- Develop galleys for your issue
- Publish an issue
Customization

Imagining Y or Z
Our Goal

“It is one thing to be able to use a particular piece of hardware or software and another thing altogether to imagine what it might do or mean if pushed beyond its typical use, or even more again to imagine what might be created in its stead. It is these latter skills that good digital humanities pedagogy must inculcate: not “how to use x tool,” though that is likely part of it, but more “understanding how x functions, delineating its affordances and limitations, and then imagining y or z.”

(Cordell 2016)
Advanced Customizations

- Custom Cascading Style Sheets (CSS)
- JavaScript
- Plugins and Modules
- Widgets and iFrames
- Compatible third-party tools
### Journal style sheet

Experienced web developers can upload a CSS file to further customize the website’s appearance.

- **Upload**

### Sidebar management

<table>
<thead>
<tr>
<th>Sidebar</th>
<th>Unselected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Toggle Block</td>
<td>Web Feed Plugin</td>
</tr>
<tr>
<td>Information Block</td>
<td>Related Items Block</td>
</tr>
<tr>
<td>&quot;Make a Submission&quot; Block</td>
<td>&quot;Developed By&quot; Block</td>
</tr>
</tbody>
</table>

### Homepage Image

Upload an image to display prominently on the homepage.

- **Upload**
Scalar: CSS and JavaScript
Omeka S: From Plugins to Modules

Plugins

The following plugins have been developed for Omeka. Click on the plugin’s name to check if it is compatible with the version of Omeka you are running. All plugins listed here require Omeka 2.0 or a newer version. For plugins that work with older versions of Omeka, see [here](#).

**Add-Ops**
- Add an add item link to the admin bar
- Date: Mar 26, 2013
- License: GPL-3

**Admin Images**
- This Omeka 2.0+ plugin allows administrators to upload images not attached to items for use in carousels and simple pages
- Date: Feb 14, 2017
- License: GPL-3

**Archive Repertory**
- Keeps original names of imported files and put them in a hierarchical structure (collection / item / files) in order to get readable urls for files and to avoid an overloading of the file server.
- Date: Jan 25, 2016
- License: OSIv2.1

**BagIt**
- Implements the BagIt specification for storing collections of files. Adds an administrative interface that allows users to (a) generate and export bags containing files on the site and (b) import bags and make their contents available through the Dropbox interface.
- Date: Aug 23, 2015
- License: Apache 2.0

Modules

Extend Omeka S with modules to map, collect, import, and connect resources.

- **Mapping** Geolocate resources and add maps to your sites.
- **Collecting** Gather public contributions through your sites.
- **Custom Vocab** Create controlled vocabulary for a particular property to use when describing a resource.
- **Metadata Browse** Browse all resources that share a value for a particular property.

[View all]
Scalar: Widgets and iFrames

Select a widget

**Timeline**
Temporal view built with metadata from a Scalar path or a remote document (uses Timeline.js).

**Visualization**
Various visualizations of Scalar pages, media, and their relationships.

**Map**
Geographic view that plots geotagged Scalar content on a map (uses Google Maps).

**Carousel**
Responsive gallery that allows users to flip through a path's media.

**Card**
Informational cards showing thumbnails, titles, and descriptions for one or more pieces of Scalar content.

**Summary**
Rows of thumbnails, titles, and descriptions for one or more pieces of Scalar content.

---

**Iframe Properties**

URL

Width Height Alignment `<not set>`

Enable scrollbars

Show frame border

Name

Advisory Title

Long Description URL
Multi-platform workflows

Host content in Omeka

Author in Scalar and Pressbooks

Submit for review via OMP or OJS

Conversion to ePubs or Print-on-Demand
Subverting expectations

- Course syllabi and student projects
- Blog to book publishing
- Immersive storytelling
- Crowdsourcing and community contributions
- Exploiting digital affordances to expose competing interpretations
- Maps, timelines, and alternative visualizations
Highly Customized Projects

Pressbooks

- Connecting People for Development: http://tascha.uw.edu/publications/ebook-connecting-people-for-development/

Omeka

- Traces of Mind Control: http://traces.brynmawr.edu/traces/

Scalar


OJS

- Blake / An Illustrated Quarterly: http://blake.lib.rochester.edu/blakeojs/index.php/blake
Publication as project

NEH-Mellon Fellowships for Digital Publication

Division of Research Programs
Receipt Deadline April 12, 2017 for Projects Beginning January 2018

Brief Summary
Through NEH-Mellon Fellowships for Digital Publication, the National Endowment for the Humanities and The Andrew W. Mellon Foundation jointly support individual scholars pursuing interpretive research projects that require digital expression and digital publication. To be eligible for this special opportunity, an applicant's...
Closing Discussion and Next Steps
Now that you have first-hand experience with the tools:

- What are the affordances?
- What are the constraints?
- What can you imagine with more...
  - **Time** (your time) i.e., what could you do on your own?
  - **Collaborators** (both their time and an expanded knowledge base and skill set) i.e., what could you do with some help from others?
  - **Funding** (grant-based or institutional) i.e., what could you do with funds to hire help?

- What can we do to help you?
Next Steps

- Introductory Webinars
- Incubation Workshops
- Individual Consultations

YOU ARE HERE
Have an idea for a digital publication?

Have a project in the works?

Have a question about specific platforms, rights and permissions, or content specifications?

We’re happy to schedule one-on-one consultations at **any time** with members of the Outreach Group and the Publications Group.
A Word IOPN and OMP

Illinois Open Publishing Network

The Illinois Open Publishing Network (IOPN) team can help you navigate the process of starting a journal or digital publication. We provide advising and resources related to digital publishing, open access and scholarly communications, and copyright.

Request a consultation!

IOPN Mission

The Illinois Open Publishing Network (IOPN) is a network of publications and publishing initiatives that are hosted and coordinated at the University of Illinois at Urbana-Champaign Library. IOPN offers a suite of publishing services to members of the University of Illinois at Urbana-Champaign community and beyond. We aim to facilitate the dissemination of high-quality, open access scholarly publications. Our services include infrastructure and support for publishing open access journals, monographs, and multi-media digital projects.
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- Maria Bonn
- Chris Maden
- Janet Swatscheno
- Courtney Becks
- Katrina Fenlon
- Joshua Lynch
- Jordan Kahle
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School of Information Sciences
The iSchool at Illinois

University of Illinois at Urbana-Champaign
Department of African American Studies

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

Illinois Program for Research in the Humanities
We want to hear from you!

Please complete our feedback survey:

Break

Or breakaway
Experimentation and Consultation

Keep developing your project; instructors are standing by to help.