Whose Queue is it Anyway?

Integrating accessibility in your templates, educating support staff, and showing where the rules can bend.

John Fudrow

Repository Librarian
University of Pittsburgh
Brief History of Time

- Repository Librarian - 2014- Present
- Manage Institutional Repository
- Coordinate ETD Support and Training
Overview

Our Panel (Background and History)
Scenes from a Hat (Our Process)
Helping Hands (Revised Support Setup)
Party Quirks (Training Tips)
Questions Only
Our Panel

(Background and History)

- ETD Program Start - 2005
- IR Platform - Eprints
- De-centralized Approval
ETD Process Group
A camel is a horse designed by a committee.

*Unknown...probably someone that sat on a committee.*
Scenes from a Hat
(Our Process)

ETD Guidelines
• Based largely on print manuscript standards
• Loosely addressed basic accessibility
• Focused more on format than function

Templates
• MS Word Template
  • Formatted to allow for easy conversion to PDF via both PC and Mac
• LaTeX template
  • Heavily customized and using conflicting packages

Approval Process
• Students submit via D-Scholarship (Institutional Repository)
• Individual staff in their graduating school review
• Staff send comments (sometimes annotated PDFs) to students
• Students revise and redeposit.
• Staff approve after graduation'

Institutional Repository
• Eprints platform (for now)
• Allows for embargo and restricted metadata via our dark archive state
• File agnostic

Technology
• Most students only need MS Word or a LaTeX compiler/Overleaf to convert
• Cloud based apps are not supported (yet)
• Currently no need for Adobe Acrobat

9/21/2022
Nothing endures but change.

~Heraclitus
Helping Hands
(Updates and Upgrades)

Common Issues

1. Preserving bookmarks in the final PDF was often unsuccessful
2. Links were broken to chapters/captions/notes
3. Page numbers shifted from preliminary sections to the body
4. Unclear instructions on how to create landscape-oriented pages
5. Where to ask for help.

Refinement of Process

1. ETD Process group changed membership
2. Set forth on a multi-phase analysis and restructuring of the process
3. Updated the information site to be more concise and feature more instructional guides.
4. Eliminated analog forms and areas of the workflows that created impasses
## Pitt ETD Process

### Prepare
1. **Templates**
   - Word and LaTeX
   - Format Guidelines

2. **Training**
   - LibGuides
   - Workshops (Virtual & In-person)
   - Video tutorials

### Write
1. **Copyright Primer**
2. **ETD Support**
   - Ask A Specialist
   - Live chat/walk-in desk
   - Consultations

### Submit
1. **D-Scholarship@Pitt (Institutional Repository)**
   - Student submission
   - Graduating school performs review

2. **More ETD Support**
   - Help with unclear editorial advice or complex issues
Adding Accessibility Shortcuts

**Word**

1. Customize styles to allow for inclusion in PDF bookmarks
2. Take advantage of the template space to add instructions and tips
3. Keep images in-line
4. Provide suggested font families

**LaTeX**

1. Provide instructions on placement of figures
2. Suggest always using caption labels and text
3. Encourage the use of the PDFX package to create tagged sections
4. Mandate sans serif font when possible, to allow for better spacing options
**FY22 ETD Approval Analysis***

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*There were logistical delays in the approval of some ETDs due to staffing changes in one of the larger schools. This total is still representative but not equal to the total number of ETDs approved over this fiscal year.
Party Quirks

(Techniques and Tips)
Assessing Approval Efficiency and Staff Comfort Levels

- Staff Survey of Familiarity of ETD Guidelines
- Open Request Form for Updates or Changes to be Made
- Open Meetings by ETD Support for Questions and Troubleshooting
- Staff-oriented lists of do’s and don’ts
- Checklist of approval steps customized to a Sharepoint form
Attempted Training and Engagement with Staff

- Monthly Open Zoom/In-person Meeting on Things to Know about Word, Accessibility, copyright, etc.
- Behind the Scenes site for forms, policy documents, and process maintenance
- Utilization of Ask an Expert/ETD Support Services for Workflow Questions and Policy Snags
Future Training and Engagement with Staff

- Provide tagged boilerplate language to be used on departmental sites and in responses to students
- Engage with staff to make connections with faculty for in-class workshops and more integration with their research process
- Create an on-boarding workflow and informational packet to be given earlier in the process
- Provide open training sessions that focus on office software such as Word and Adobe, to be further utilized in staff’s non-ETD responsibilities
Learn the rules like a pro, so you can break them like an artist.

~Pablo Picasso
Rules to Break and Paths to Make

**Function over Form**

1. Shorter paragraphs and breaks in-between
2. Don’t’ worry about justification (but be consistent)
3. Page Breaks
4. Bibliography Styles
5. Supplemental Files

**Individual Expression**

1. Customization of Layouts for different disciplines
2. Suggestions for three-paper theses and dissertations
3. Variant versions (open access vs copyright restricted)
4. Non-textual submissions

**Remove Redundancy**

1. Don’t rely on one application to solve every issue
2. Monitor LaTeX developments and test for conflicts
3. Make sure IT staff are aware of requirements for staff devices but also public stations
Finale

- Listen
- Plan
- Innovate
- Instruct
- Reflect
- Keep Listening
Thank You

John Fudrow
jfudrow@pitt.edu
Electronic Theses and Dissertations (pitt.edu)