Whose Queue is it Anyway?

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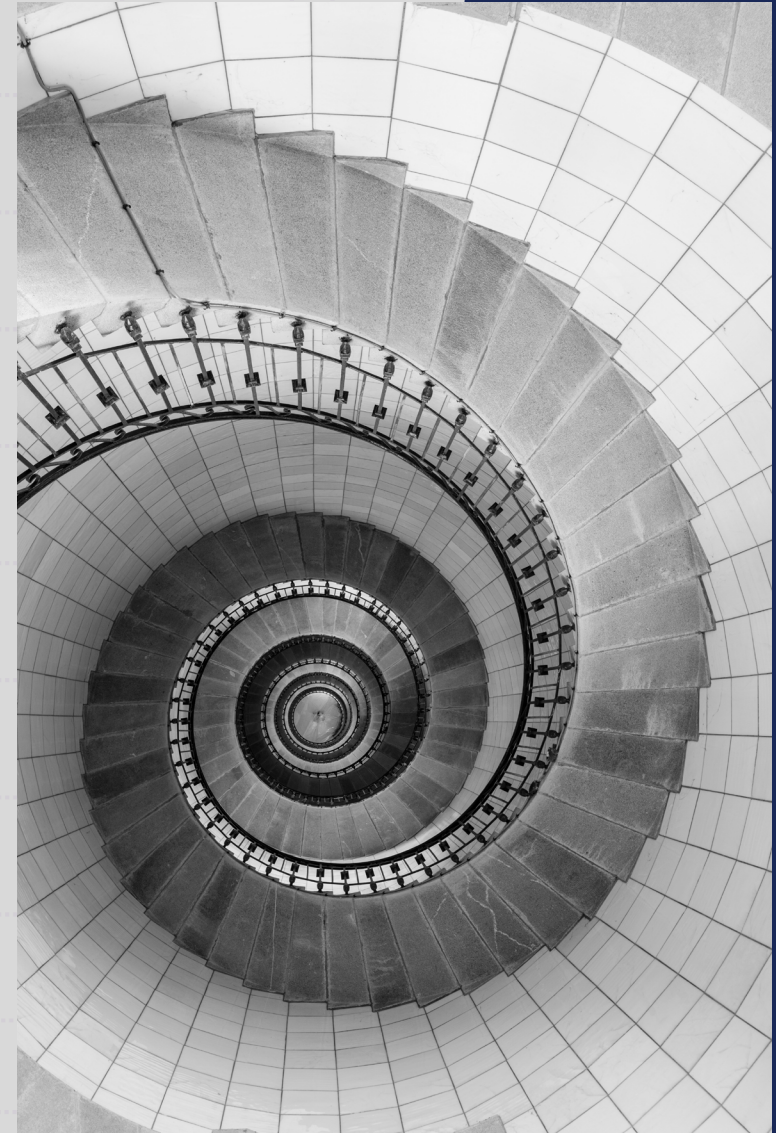
John Fudrow

Repository Librarian
University of Pittsburgh

Brief History of ~~T~~ime

- 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
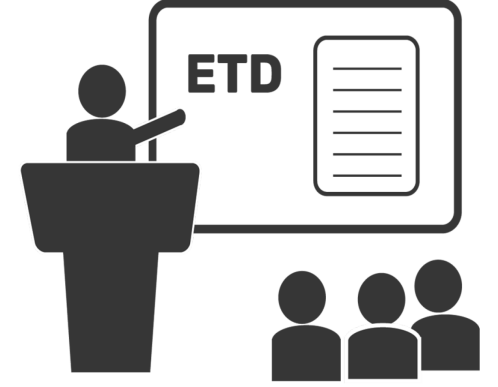- De-centralized Approval

Office of the Provost

Registrar's Office

Graduate School Student Services Staff

University Library System Support Staff

ETD Process Group

A camel is a horse designed by a committee.

Unknown…probably someone that sat on a committee.

ETD Guidelines	Templates	Approval Process	Institutional Repository	Technology

• Based largely on print manuscript standards
• Loosely addressed basic accessibility
• Focused more on format than function
	• MS Word Template
	  • *Formatted to allow for easy conversion to PDF via both PC and Mac*
	• *LaTeX template*
	  • *Heavily customized and using conflicting packages*
		• 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'
			• Eprints platform (for now)
			• Allows for embargo and restricted metadata via our dark archive state
			• File agnostic
				• 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

Scenes from a Hat
(Our Process)

Nothing endures but change.

~Heraclitus

Whose Queue is it Anyway?

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

1.2 Using Styles to Correctly Ensure Your Document is Accessible ¶

Using headings and other styles correctly throughout your document ensures that it is accessible to people with print disabilities. Screen readers and other accessibility technologies use styles to navigate the document. It is important that you use styles for emphasis instead of just adjusting the font of the text, as screen readers cannot recognize bold or italic but can recognize styles. For a Pitt ETD it is preferable to use a sub-section for important text, but you can also use the styles **Strong (bold)** or *Emphasis (italics)*. ¶

1.3 Consistency in Style Use¶

The most important thing to consider when adding elements to your ETD, is to aim for consistency. If you add block text or quotations that vary from the Normal style, your best bet is to create a style for that customization and use it throughout the document. It's also best to minimize the amount of in-line editing that you do, as when you adjust a few lines of text that varies from the rest of the document, it will most probably be flagged on review. ¶

1.3.1 Heading Levels¶

You may have noticed that the Heading 3 style is left aligned, rather than the center alignment that Headings 1 and 2 use. That is intentional and adheres to the ETD Formatting Guidelines. You don't need to adjust any of the formatting with the Headings that are included. This includes the number of spaces before or after the Headings. If you add an extra space after a

2¶

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*

	Bookmarks Included	Alt Text	Acceptable Font Family	File Info
Yes	347	0	359	0
No	14	361	2	361

*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

# Take Two

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

Take Three

Learn the rules like a pro, so you can break them like an artist.

~Pablo Picasso

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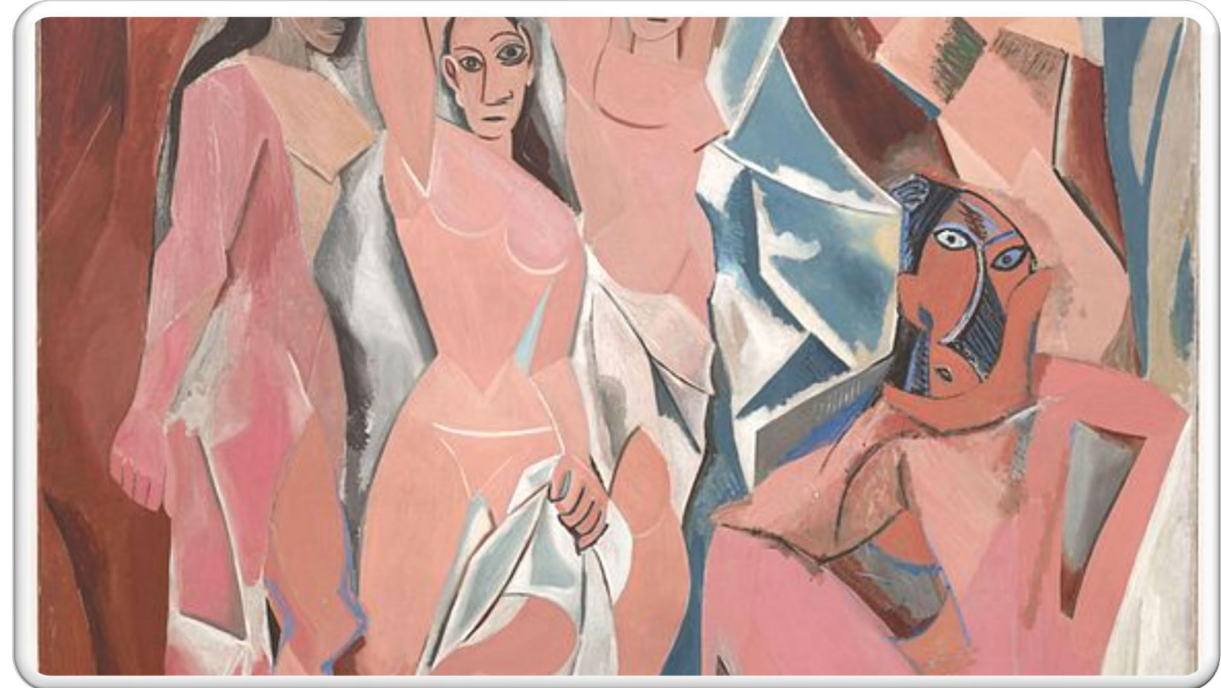
Rules to Break and Paths to Make

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

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Electronic Theses and Dissertations (pitt.edu)

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