Background

• Library and Archives Canada will only be accepting electronic submissions of theses and dissertations as of April 2014

• The Weller ETD Project began in early 2012 at UNBC as a joint initiative of the Library and the Office of the Dean of Graduate Programs

• An attempt to manage the entire workflow from pre-defense to post-defense
Potential Benefits

• Operational, time, cost and space savings for Graduate Programs
• Space savings for the university library and archives
• An opportunity to re-examine workflows and maximize efficiencies
• Broadening the dissemination of graduate work
• Increased accountability through audit trails
Potential Challenges

• Interdepartmental collaboration and cooperation on a number of different levels

• Creation of standards, policies and workflow strategies unique to the electronic environment

• Consideration of intellectual property issues, rights management and long term preservation
System Requirements

- **Integration**: access student management systems
- **Intuitive**: requires little training for students, staff and faculty
- **Security**: provide secure authentication mechanism
- **Flexibility**: can easily adapt to any workflow
- **Open Source**: eliminate licensing fees
Data Collection Configuration

Drag and drop interface for defining and grouping the information to be collected.
Form Editor

Drag and drop interface for creating forms as presented to the user.
Workflow Manager
Drag and drop interface for defining workflows.
Example Form

What the student sees when they fill out the form.
Supervisor’s Overview Screen

The overview screen displays all the submissions for which they are responsible along with what stage they are at and any required actions they need to do.
Manage Submissions

Allows the administrator to view details about every submission as well as perform various operations like ingest into repository, view audit trail or delete.
Lessons Learned

• If possible, consider setting up the institutional repository before implementing the ETD workflow
  • Raises awareness of open access and scholarly communication issues
  • Allows greater involvement of liaison librarians

• Manage expectations

• Communicate clearly and consistently with all stakeholders
Current Status

• Currently in debugging stage
• Not production ready but good to play around with
• Looking to build a community around the software

Where to get it:
DRUPAL.ORG/SANDBOX/DYULE/1666010
Questions or Comments

YOUR OPPORTUNITY TO LEARN FROM OUR EXPERIENCE