

## 7 Stages of a New Direct Submission Process for ETDs

Workflow when moving ETDs to direct submission through Digital Commons

1. Information Gathering
  - 1.1. Stakeholders (Graduate School, digital staff, etc.)
    - What is your goal?
    - What are you trying to accomplish?
    - How does this fit with other initiatives?
    - What do you like? What do you want to change?
    - What is your timeline
  - 1.2. Bepress Support
    - Are there best practices?
    - Can you share other examples?
    - What issues should be considered?
  - 1.3. Other bepress users (GoogleGroups)
    - What have you done?
    - Any surprises?
2. Evaluation & Implementation
  - 2.1. Submission form
    - What works and what needs to be changed?
    - Other initiatives to consider (e.g. DOIs, adding Discipline, etc.)
  - 2.2. Series structure
    - Bucket ETD series vs. College-specific series
  - 2.3. Repository structure
    - Changes at the community levels?
  - 2.4. Other workflow questions
    - Approving metadata
    - Creating MARC records
3. Behind-the-Scenes
  - 3.1. Administrator privileges
    - Who needs access and at what level?
    - Who needs (or wants) to receive email notifications?
  - 3.2. Submission agreement
  - 3.3. Email template
    - Customizing messages sent by staff
  - 3.4. Training
    - Coordinate with bepress support
4. Documentation
  - 4.1. External: Instructions for students and for administrators
  - 4.2. Repository pages
  - 4.3. Internal: Documenting decisions and workflow procedures

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5. Testing
  - 5.1. Submission form on demo site
  - 5.2. Review instructions and distribute for feedback
  - 5.3. Move form to live site
    - Update links
6. Launch
7. Troubleshoot, Debrief, and Update