

## 11 **"Distance Learning, its Knowledgebank and Usability"**

When working with a wide, remote audience of distance learners, providing easy-to-use learning tools is vital, explains John McBurnie, who worked on a project that created a better user experience. He outlines the lessons he learned.

## 19 **"Knowing Knowledge"**

Society and organisations run on learning and knowledge, but these terms don't mean the same thing as they used to. In his e-book "Knowing Knowledge" George Siemens explains how to get to know knowledge in a new environment. Marjorie Desgrosseilliers reviews.

## 21 **"EThOS: A New Start for Doctoral Theses in the UK"**

EThOS aims to improve access to UK doctoral theses by making them electronically available. Meanwhile, Neil Jacobs and Anthony Troman explain how universities can navigate a digitisation project.



Plus ...

Jobs,  
Discussion,  
Tips, Reviews  
and Events

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## Editorial



Academic thesis structures are fairly unbending. And with good reason. These documents have a rigid format, designed to clearly showcase what students know about their field of study.

While the format might not have evolved much over the years, the road a dissertation travels certainly has.

First stop: the evolution of knowledge. The manner in which we gain and work with knowledge is continually in flux, which is the point George Siemens makes in his book "Knowing Knowledge", also available for downloading as an e-book. Marjorie Desgrosseillers reviews this fun and constantly changing tome.

Secondly, the way people learn. More people than ever are obtaining online PhDs, completing their studies entirely over the Internet. But that doesn't mean all online courses are designed well. John McBurnie reports in this issue how his employer if's School of Finance discovered better ways to deliver courses. This issue's Tipples contain more tips on how to fine-tune your online courses.

And the last stop of a dissertation used to be a dusty shelf somewhere in a gloomy library. No longer. Today, theses can be created in digital form, and archives are slowly being converted to electronic format as well. The EThOS project is one major force that aims to provide an easy way of converting pulp into pixels. Neil Jordan and Anthony Troman explain.

Knowledge is a long road that may never end, but we'll keep reporting on it. If you see trends in the information industry you'd like to speak out on, let me know. I'd love to hear more about what you thought of this issue and what you think should go into future issues.

Sincerely,

Monique Cuvelier Editor, FreePint  
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## My Favourite Tipples

by Peter Maureemootoo

As an expert in how people interact with computers, I always try to think of the simplest way to present information to learners when building and publishing online courses. I turn to these sites time and again for creating a better user experience.

- The Usability Toolkit from the Society for Technical Communication <<http://www.stcsig.org/usability/resources/toolkit/toolkit.html>> contains scads of checklists and templates that help you organize online course design.
- Q&A with Don Norman <<http://digbig.com/4sdjj>>. I respect usability guru Don Norman enormously, and in this excellent article, he shows what he knows about how people learn.
- Gadwin PrintScreen <<http://www.gadwin.com/printscreens/>> is one tool I can't live without when building courses. This free software makes creating custom-sized screen grabs a snap.
- Why People Can't Use eLearning <<http://digbig.com/4sdjk>> is a compelling white paper that shows the other side of the hype – when e-learning goes bad.
- The WellStyled Workshop's Color Schemes Generator 2 <<http://wellstyled.com/tools/colorscheme2/index-en.html>> lets you create pleasing colour palettes that always work on the Web.

Peter Maureemootoo is president and co-founder of Talanc Inc., <<http://www.talanc.com/>>, a company that publishes and builds online courses and robust, large-scale websites. He has special expertise in creating intuitive and compelling systems for all users.

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Monique Cuvelier is Editor of the FreePint Newsletter. She has served as editor of several publications and her writing has appeared in Publish, USA Today, Bankrate and many others. Learn more about her at <http://www.onopoly.com/support/team/>..

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- Clearly, one danger of a digitised dissertation is an increased risk of plagiarism. That's what would make a plagiarism detecting tool useful. One Bar member is looking for such a tool to try out <<http://www.freepint.com/go/b115373>>. Know of any?
- Could your iPod be giving you subliminal messages? One FreePinter thinks that might be the case. She discovered a short music clip that has no clear origin and suspects it might be viral marketing. Or is it possibly an uncategorised download? You weigh in <<http://www.freepint.com/go/b119257>>.
- One Bar participant is demo-ing a new online service his company is building for Reuters that he describes as a 'combination Yahoo Answers + Wikipedia + LinkedIn'. He's looking for feedback from the FP community on how to fine-tune the system. Find the link and more at the Bar <<http://www.freepint.com/go/b118996>>.
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## "Distance Learning, ifs KnowledgeBank and Usability"

By John McBurnie



John McBurnie is a Research Specialist at the ifs School of Finance <<http://www.ifslearning.com/home/default.cfm>>, an organisation that provides education from GCSE level through to undergraduate degree level. John works on ifs KnowledgeBank - the ifs' e-library.

As access to the Internet becomes less expensive and more widely available, distance learning is becoming an increasingly efficient way of delivering learning programmes to a wider audience, both in terms of geography and non-traditional students. However, when working with a wide, remote audience of distance learners, providing easy-to-use learning tools is vital. This is why quality usability is needed when providing electronic information to distance learners.

The value of information decreases if users cannot find it easily. Just as a traditional library requires a system in which the correct books are easy to find, providing online content also requires a systematic approach.

These are rules ifs School of Finance learned when improving usability for learners while undergoing a redesign in August 2006. Ifs provides financial education via distance learning from GCSE level through to undergraduate degree level. One of the main delivery methods of electronic information is ifs KnowledgeBank, an electronic library and information service. This article discusses the experience of KnowledgeBank, specifically tracking learners' habits and usability testing.

### Design and tracking users

As Internet usage and technology have become more advanced, users have become faster in their decision-making. One survey demonstrated that some Web users spend only 30 seconds on a homepage <<http://www.useit.com/hotlist/spotlight.html>>, suggesting that designers of

online information systems have little time to leave an impression on their users.

Since websites first appeared, designers have analysed traffic on their sites. Early websites had simple Web-visit counters, while today, administrators use sophisticated usage-trend software.

KnowledgeBank uses statistical software that allows for examination of complex metrics, such as the most popular route users take to a certain item of content, or the average time users spend on certain pages. Tracking KnowledgeBank in this way has proven a powerful tool because analysing what users are looking at, and what route they are taking to access that content, enables more effective tailoring of the content available.

The ability to look at past user behaviour is the most useful way to predict future behaviour and tailor usability accordingly. For example, tracking user behaviour has revealed:

- KnowledgeBank is more popular amongst Bachelor of Science (BSc) students than other students
- Our most popular page is the electronic reading list Study Support.

As a result of this analysis, we redesigned static links on the front page so that BSc students are directed straight to the Study Support page, where they are able to access electronic books and journal articles within three clicks. However it was important these links were not construed as misleading 'advertising', hiding other important content on the site. Therefore links to

other popular pages were included at the foot of the Study Support pages and other areas were made easily available via a navigation bar. Designers need to appreciate that users have goals, and 'find-ability' is an important criterion.

### **Bridging the gap**

One disadvantage of providing online learning support to distance learners is the disconnect between user and provider. In a traditional library, users and librarians have the ability to have face-to-face discussions. Replicating this kind of relationship is difficult in a virtual distance-learning environment, and users seem more reticent to give feedback about virtual environments compared to brick-and-mortar environments. Usage-trend software can be a powerful tool; however, it becomes more potent when combined with direct feedback from users.

At KnowledgeBank, every opportunity possible is taken to talk directly with students. Students have the option to attend face-to-face workshops with their tutor. KnowledgeBank staff attend these workshops to receive feedback on usability and content. One consistent theme from these views was that students were unsure how the different areas of KnowledgeBank could help them. To address this feedback, the most popular links, with a short piece of text explaining exactly what the link provided, and how they helped students were provided on the homepage. By learning from feedback, as well as thinking through the links and navigation, we provided guidance to help users with their choices.

Initially links were given ambiguous titles such as Resources and Subject Gateways. The (incorrect) assumption underlying the initial design was that

users would make the 'right' choice because they had been provided with a link to valuable information. However, designers cannot presume that the average visitor will have the same confidence in navigating websites.

Feedback and statistical analysis revealed that users respond well to a successful first click. Users do not like bouncing back and forth between different links on a page. In the KnowledgeBank context, our research revealed that users want to know if the option offered will help them to complete a specific task, for example passing an assignment.

### **Usability testing**

KnowledgeBank did not go through initial formal usability testing. Colleagues who were not directly involved with the project informally



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tested it. Due to time constraints the testing only occurred at the end of the design project's life cycle. The testing involved providing five colleagues with a series of tasks. From this, a set of statistics was collated. For example, three out of the five subjects completed 70% of the tasks successfully with an average time taken of 1 minute 27 seconds.

Due to the resource constraints, testing did not affect the usability of KnowledgeBank when it was launched post-redesign. Although some minor problems were identified at the testing stage, there was little that could be done given the time schedule for developing the new design.

We identified that there was a great deal of information on the site in different structures for different groups of users. This posed the biggest challenge for providing a clear path to all information. As a result of testing, our marketing and user manuals were tailored to help the different groups. Importantly, when content is added to KnowledgeBank it is added within the current design parameters, so as to not confuse the disparate groups of users. If this were not the case, then there is the potential to forge ahead with new design decisions, which may bring their own usability problems.

Usability testing cannot reveal all the information needed to make usability perfect, but it is helpful to learn:

- How users fulfil their information needs
- How website design can be helpful (or not) to users.

If resources had been available, testing of KnowledgeBank would have occurred throughout the design process in a more organic fashion. For

effective usability testing, designers ideally receive feedback at different phases of the project, analyse that feedback and then integrate it into the design process. An effective approach is to regard testing results as a body of knowledge to influence usability and design.

### **Asking the right questions**

However, usability testing involves more than simply putting a group of people in front of a computer, and asking them to find a particular piece of information. One key aspect relates to the tasks set to be tested. One way to construct usability tasks is to construct them to see how users complete specific tasks, for example, 'find the link to the Lithuanian Central Bank via the Web Directory'. Another way to construct tasks is to take a more open-ended approach, for example, 'find some information on Baltic Central Banks', to see how users engage with the site to solve problems. If both approaches are used, designers will come to a more comprehensive understanding of how users interact with a website.

One element often overlooked is that the group of people testing will influence the process. Testing using only people who work for the organisation, or using friends and family will not produce a complete overview. Although more expensive, market research and employment agencies are able to provide respondents who will match a certain profile and can be used to 'blind test' the website's usability. When this research is carried out, it is vital that the participants do not know the name of the organisation being tested, or any other details that may affect their judgement.

**Related FreePint links:**

- "Website Usability" By Paula Murdoch <<http://www.freepint.com/issues/240205.htm#tips>>
- "Working with a Usability Specialist" By John S. Rhodes <<http://www.freepint.com/issues/240806.htm#tips>>
- "Books About Usability" By Dr. Jakob Nielsen <<http://www.freepint.com/issues/100806.htm#bookshelf>>
- "Usability - ignore it at your peril!" By Sarah Agarwal <<http://www.freepint.com/issues/150704.htm#feature>>

Designers should remember that it is the website's usability that is being tested, not the subject matter nor indeed their competence. Those carrying out the testing should be made aware that any feedback they can offer is valuable, no matter how trivial it may seem to them. Usability testing should not be seen simply as part of a design process tick-list with the results of the testing filed away and not used. It is crucial that the results of usability testing are analysed and acted upon.

**Conclusions**

From the experiences of developing the usability of KnowledgeBank we at ifs School of Finance have learned that designers must focus on what user's are trying to accomplish when accessing content online.

Compiling and publishing information is one of the easier aspects of providing information via the Internet for distance learners. Delivering information in a user- friendly way is considerably more challenging. When initially specifying the site's information architecture, designers must look beyond the navigation and links and think more deeply about how the user is finding the information to accomplish their objectives.

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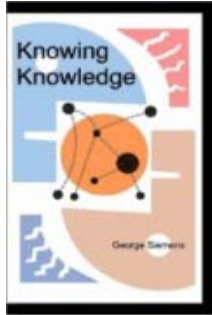
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## "Knowing Knowledge"

Written by George Siemens

Reviewed by Marjorie Desgrosseilliers



Marjorie Desgrosseilliers is CEO and Owner of SmartyPants Research Services, LLC, a company that provides ... you guessed it ... research services to business and other information professionals. Due to her experience and tenure within the information industry (over 15 years), she has accumulated a large number of contacts (networks) encompassing many different industries across the US and around the world. Marjorie teaches on telephone research - how to reach information gatekeepers, and how to get information from them once you reach them - at major industry conferences, and at her client companies. You can reach her at <marjorie@smartyantsresearch.com>, or on 425-408-0368.

George Siemens, the author of "Knowing Knowledge", does not seek to define knowledge. Rather, he seeks to tackle it. He does this in his book (available for purchase or download <<http://www.knowingknowledge.com/book.php>>) by eschewing the typical linear approach most authors take when broaching a topic. Instead, he guides us into the subject as a whole - describing knowledge from different angles or perspectives. Much like the old story about the blindfolded men trying to describe an elephant. One had the trunk, one the tail and one an ear. Each described the elephant based on his own experience, but none had the whole picture.

According to Siemens, knowing and learning take place much the same way today. Knowledge is born through building concept upon concept, mixed with pieces taken from various, and often chaotic, sources. Knowledge comes and is defined through connections not necessarily aligned in a pre-defined, linear format. Knowledge is no longer shaped by categorisation and disseminated through hierarchies.

A major change occurred as we moved from the industrial age into the information age: instead of one-way learning, we want a two-way street, to engage in and reshape the knowledge we find. We want to connect with others to learn what they know, and then make that knowledge our own (blogs, wikis, etc). According to Siemens, doing so diminishes the 'prominence of the originator' (which begs the question, moving forward, of how that will affect the issue of copyright). Knowledge doesn't come

solely through static products (books or lesson plans created years before publishing). With the advent of the Internet and 2.0 technologies, knowledge is now rapidly created, shared, developed, accessed and collaborated on through and by the power of networks (contacts). It is a two-way, fluid (editable), active, 'now' exchange.

However, Siemens posits that we are still bound up in industrial-age thinking when it comes to using, disseminating and storing knowledge. 'We stand with our feet in two worlds: one in the models and structures that originated in (and served well) the industrial era, and the second within the emerging processes and functions of knowledge flow in our era today' (p. 5).



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As an information professional, I'm inclined to agree. The flow of information/knowledge today is 'dizzying in pace' and exponential in growth. Human beings are addicted to information. We crave it. We have an insatiable drive to learn. Unfortunately, the tools that help us find and use information (to create knowledge) are insufficient. We are bound by their limitations. We spend more time looking for information than actually using it. That needs to change.

Because this cooperative, two-way flow now exists, change is also needed in how organisations look at knowledge, knowing and learning; [the last chapter of this book describes Siemens' 5-step process to design organisations that can 'change and morph as required' in order to 'align with the changed context and characteristics of knowledge' (p. 116)]. Siemens advocates chaos rather than control - with an emphasis on self-directed learning (combined with structured learning - he believes that experts definitely have a place). New tools are needed to help end-users and organisations weave together the bits and pieces they gather, to 'dialogue, reframe, rethink, connect' and pattern knowledge, as well as manage their identities (what a coup it would be for the software developer or knowledge provider or anyone else who could figure that one out!).

Though a bit difficult to slog through in places, "Knowing Knowledge" is one of those rare books in which the endgame of the author is not necessarily to lead the reader to a pre-formed conclusion. It's purposefully written so that the reader comes to his or her own

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## "EThOS: A New Start for Doctoral Theses in the UK"

By Neil Jacobs and Anthony Troman



Neil Jacobs manages the JISC Digital Repositories development programme, a 3.5m GBP public investment in the infrastructure of UK tertiary education. He also edited a book on open access to research publications, which was published in 2006 (Open Access – Key strategic, technical and economic aspects: <<http://digbig.com/4gfa>>). He has previously managed the national database of the UK Economic and Social Research Council, and has conducted research into a wide range of topics including students' and tutors' discourse around online learning, scholarly communication and technology, academic library services, and adolescent body image concerns. He is on the Board of 'euroCRIS' <<http://www.eurocris.org/en/>>, a European organisation concerned with Current Research Information Systems (CRIS).

Recently, over 70 higher education institutions in the UK voted to support the development of a new UK e-theses service called EThOS (Electronic Theses Online Service). Many others have indicated that they will work with EThOS and, with substantial backing from the Joint Information Systems Committee (JISC) <<http://www.jisc.ac.uk/>>, CURL (Consortium of Research Libraries in the British Isles) <<http://www.curl.ac.uk/>> and the British Library <<http://www.bl.uk/>>, EThOS aims to improve access to UK doctoral theses. A fully functional prototype system will be scaled up for live operation over the next year or so.

But who will benefit from EThOS? And why establish the service now?

### The context of a thesis: a university or college

Global access to scholarly publications is improving, thanks mainly to the growth of institutional repositories as well as associated IT developments in universities and colleges.

Statistics indicate that when doctoral theses are made openly available in electronic format, their usage levels increase significantly. Data from universities such as Virginia Tech <<http://scholar.lib.vt.edu/theses/data/>> reveal that many of the theses made available in institutional repositories are accessed not only by a very large number of people from educational establishments but also by individuals in industry and the voluntary sector.

Access figures also indicate that e-theses are consulted by users from a

wide range of countries. Such high visibility serves as a means of showcasing high quality research, and it is a useful way of attracting sponsorship and potential students.

At present, the vast majority of UK theses are still stored as paper copies and only made available for consultation within university libraries or provided on inter-library loan from the British Library, in microfilm or paper format <<http://www.bl.uk/britishthesis/>>. As a result they are currently underused.

However, following the recently completed EThOS Project <<http://www.ethos.ac.uk/>>, some universities and colleges are using the EThOS Toolkit <<http://ethostoolkit.rgu.ac.uk/>> to establish institutional repositories, which include e-theses, and to make the organisational changes that will populate these repositories. This approach promises savings to universities and colleges and improvements in the availability of theses (plus supporting material such as video or databases) in the long term.

### The EThOS service and business model

EThOS will maintain a UK database of theses, from which researchers will be able to find, select, access and archive e-theses that have been produced in UK universities and colleges. The service is a partnership between UK universities and the British Library, and the service model includes a wide variety of ways in which universities can participate. The central EThOS hub can harvest e-theses and/or records of

paper theses from institutional repositories or elsewhere, and then work with universities to deliver those theses that are requested, either directly (if the thesis is already in electronic format) or by digitising the thesis. The aim is to ensure that EThOS is a viable, attractive and well-used service.

EThOS will make e-theses available free at point of use. The large-scale digitisation of paper theses is essential because the vast majority of theses produced over the past 10-15 years are not in electronic format, and this is where the heaviest demand will fall. Paper theses will also continue to be produced until all universities have implemented an institutional repository and made the necessary changes to their internal procedures. Theses only need to be digitised once - they are then permanently available for free and immediate download. Large-scale digitisation is only required until the bulk of the theses wanted by researchers are digitised. It is estimated that after 10-15 years the operation will be scaled down. Digitised theses will be returned to the originating institution for inclusion in their institutional repository.

EThOS is a cost recovery service - all funds raised will be spent on the service and digitisation of UK theses. Universities and colleges offering content via EThOS have a choice of relationship type. Large institutions will be asked to help guarantee the financial viability of the service by making an annual advance payment, for which they will receive digitisation of a guaranteed number of its theses, including those ordered on demand by researchers. The number of theses

digitised will be to the full value of the advance payment figure and the minimum initial commitment will be three years. The fee depends on the size of the university or college, and varies from 8,000 GBP per annum for a large institution to 2,000 GBP for smaller institutions. Universities and colleges that wish to pay for the digitisation of individual theses may join EThOS as associate members.

EThOS is a partnership between UK Higher Education and the British Library, with various sets of roles and responsibilities available. A university facing the move from paper to electronic theses can work with EThOS in a variety of ways but, if the aim is natively to manage the thesis lifecycle electronically, then there are a number of steps that will need to be taken by the university. These are spelt out more fully in the EThOS toolkit <<http://ethostoolkit.rgu.ac.uk/>>, and are summarised here.



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### **Making a business case**

First, as with any project, there needs to be a viable business case. Managing paper theses, and making them available, takes time and effort. It is also relatively ineffective in showcasing what should be some of the most innovative research being undertaken at the university. Simple calculations can estimate the direct costs of a paper-based approach, but the benefits (for the university, for students, for supervisors, etc) that are forgone by managing paper theses are more difficult to assess. However, these and other benefits need to be presented as they are relevant to each of the various constituencies within the university, in order to underpin support for any move to electronic theses. The benefits are maximised by combining any such internal moves with participation in the EThOS UK national service, since EThOS will certainly be the main port of call for those seeking UK theses.

Of course, a business case needs to recognise costs as well as benefits. If a university has a repository, or plans for one, then much of the infrastructure can piggy back on that. There is a specified metadata schema for UK e-theses, by which their records need to be exposed via Open Access Initiative Protocol for Metadata Harvesting (OAI-PMH) to the EThOS central hub; the deposit or submission process for theses will need to gather metadata to ensure this is possible. If the university is setting up a repository specifically for e-theses, then there is also a wider range of questions to answer, such as the software to use, and the sustainability of the repository and the

items within it. This can be informed, though, by the EThOS offer, which includes a commitment by the British Library to maintain access to theses in the long term.

There are likely to be considerable cultural and administrative challenges in the move to e-theses. Of course, these will be eased by building and presenting the business case well. There are policy questions, such as whether the university repository will hold only doctoral theses, or include other types of document, and whether deposit of a thesis into the repository will be optional or mandatory. Obviously, mandatory deposit will result in more theses being deposited, but it will require more work to get such a policy through the relevant university committees. The EThOS toolkit notes that 'more than one university committee may need to be approached and a proposal to allow, or require, the submission of theses in electronic format may need to be discussed at several meetings before it is accepted formally. It may prove helpful to put forward a discussion paper for approval in principle at an early stage so that committee members are familiar with the idea by the time detailed paperwork is submitted'.

### **Legal issues and open access**

Establishing an e-theses program contains relevant legal questions. The EThOS Toolkit notes that 'British theses are protected under the Copyright, Designs and Patents Act, 1988 as unpublished works. The copyright of a thesis generally belongs to the author

**Related FreePint links:**

- "Digital Repositories in UK universities and colleges"  
By Neil Jacobs  
<<http://www.freepint.com/issues/160206.htm#feature>>
- Digitising Dissertations - FreePint Bar  
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but this ownership may be assigned by written agreement either specifically or as part of an undertaking between the researcher and the awarding institution when the course of research was entered upon. If the awarding institution actually employs the researcher to undertake the work, the copyright belongs automatically to the awarding institution unless a contract freely entered into by both parties specifies otherwise.'

An expert review has been completed of IPR issues as they would affect the EThOS service. In future, EThOS partner institutions can put in place appropriate licenses to define the permissions granted by rights holders to supply theses submitted. However, EThOS will digitise paper theses submitted prior to this licensing without asking permission from the primary rights holder (usually the author), unless that rights holder has stated otherwise. This is a pragmatic approach, since retrospectively locating thesis authors is impractical. However, because the benefits of EThOS accrue mainly to the UK higher education sector, with no profit or other benefit being derived by the service itself, this approach was considered to be most sensible. From now on, however, universities should ensure that they obtain sufficient rights to enable them to make doctoral theses available in the long term, typically by use of a deposit license agreed at the time the thesis is first deposited in the repository. These rights should then be passed as appropriate through the EThOS service, via the central hub, to the end user, in order that everyone involved is aware what they can and cannot do.

The EThOS service is Open Access, for theses from participating institutions. However, doctoral degrees are often sponsored or otherwise undertaken in partnership with commercial companies who may wish to maintain a degree of control over the intellectual property contained in a thesis. Furthermore, material over which third parties have rights may be included in a thesis for other reasons, perhaps because the student is unaware that such inclusion in a public document is not permitted. The EThOS toolkit notes that 'instead of creating these problems, technological advancements



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have merely illuminated the failings of the current system to address appropriate copyright management at source. Albeit, institutions have an obligation to ensure current authors are more aware of the implications of third party material being included in theses; institutions need to raise awareness with advocacy. Moreover, for born-digital theses, institutions need to encourage authors to seek permissions from any third-party copyright owners. However, where permissions are not forthcoming authors must be well-informed of the need to edit their material before submission to the repository'. Furthermore, where a third party, such as a sponsoring company, wishes to impose an embargo on a thesis, the repository needs to be able to encode this. The EThOS arrangements specifically allow for this.

### The future

The current provision of theses in paper and microfilm format is costly to both universities and colleges and the British Library. The inefficiency of the current arrangements has led to a situation that is unsustainable; it is hard to see how the current British Library service can continue in the face of technological developments in other services around the world. The supply of theses in electronic format through institutional repositories and EThOS will provide a timely and state-of-the-art alternative, which will be of benefit to authors and readers of theses, and to the institutions that host them.

The logo for digbig, featuring the word "digbig" in a lowercase, rounded, pink font.

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