

Spring Term 2011

13 January 2011



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(RETIRING: JANUARY 31, 2011)



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## Standard Guidelines for the Thesis/Project/Essays Review

**Before requesting a consultation , there is an active self-review process, which you carry out yourself, first.**

- Having me review your thesis, project or extended essays is not a requirement. It is an “back-up” service, after you have completed your own review, and if it proves impossible to clear the problems by email consultation.

### (1) Read this PDF right to the end before commencing work

- You need to do this in order to obtain an overview of the scope of the review you will be doing.
  - You need to check out what help material is available, then download the Key Review Documents from my webpage, which are mentioned below.
  - This checklist will also help you identify potential problem areas or problems you have already solved.
  - Enjoy putting a big X through issues that are not relevant or have already completed!

### (2) IMPORTANT NOTE

**If you have disabilities, or other impediments**, which prevent you from doing formatting or doing this review even with the help of your usual network, please be “up front” with me about this so that we can together identify some practical work-arounds for you.

- Here is a common impediment: If you face an unmanageable time squeeze, then it may make sense for you to hire an expert to
  - Set your beginning thesis document up for you;
  - do all the formatting;
  - or conduct this review and tune-up for you.
- If you have written your document without starting from an SFU Library template (or Joan Wolfe’s template), and are thinking of pasting your work “into the template” after your defence, you definitely need a good time margin or help. Give “Applying a Template to an Existing Document”, found at <http://www.lib.sfu.ca/help/writing/theses/msword>, a quick read to understand the complexity of the task, and then seriously consider hiring someone.
- In any case, I can provide the names of three experienced SFU people familiar with SFU thesis/project/essays standards.

### (3) You CAN fix many of the glitches you encounter

- You do this by using the helpsheets such as ““Reviewing Your Own” “Strategies for Figures and Tables” and especially “Final Tidying.” They are the equivalent of a three hour consultation.

### (4) Then sit back and take a deep breath

- There are three reasons students (and others in professional situations) can’t even see document glitches or figure out how to fix them:

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- Familiarity** with the document. Take a day's break and a couple of good night's sleep to refresh your vision. Use "Find" as much as possible to replace searching with your own tired eyes.
- Forward velocity**: at this point in the process, we are moving forward so fast to just get finished that we can't see clearly anymore. It may not quite be panic. It is usually just the rushing feel of overdrive pushing us toward panic.
- Choked up with fear**. Feeling so "in-over-your-head" and helplessly inept that you feel like you are in slow motion, or shrunk down to practically child-size and need a Great Big Grade One Teacher to tell you how to do every detail.
- All these bizarre impressions are pretty normal, believe it or not**. I know because I see over 600 students every year going through this. Few are calm or rested. **So, sitting down, calming down and breathing is vital**.
- What I really encourage you to do is get comfortable with the idea of making your own management decision that this is a "go" for submission, i.e. without my reassurance. I know that that is scary, but it will usually turn into a sound sense of accomplishment. I see this, also, from those 600 students I see every year.

### (5) Then, please take another walk through those documents

- Yes, another walk through, crossing off all the issues you have taken care of.

### (6) When you are done the review process, if you still need help, go to the end to find information on emailing me.

## Review Process

This check list below is for you to use to ensure you have really covered everything.

### To obtain review documents

Go direct to <http://www.lib.sfu.ca/theses/> to find the named item.

- If that page is inaccessible, please try again, as website servicing may be occurring.
- NOTE**: Documents are large. If you have trouble downloading:
  - Try the 3-part version of "Reviewing Your Own" at <http://www.lib.sfu.ca/theses/>.
  - No high speed connection at home? try downloading at an SFU campus (or other institution with a high speed connection) onto a USB key or disk for use at home.
  - Your internet browser says the PDF is "corrupted", broken or unopenable for any reason? Try using a different browser.

### Key review documents

Available at <http://www.lib.sfu.ca/theses/> and on sub-pages from there.

- UPDATED every semester: Reviewing Your Own (pdf)** : Required features of a thesis/project document: Get the current semester's edition.
- Thesis Checklist for Latex Users**.
- Final Tidying in MSWord**. Covers: misbehaving headings and margins, glitches in heading capitalization, page numbers shifting in the Table of Contents, poor indentation in Lists of Tables/Figures, caption glitches, and other text-dependent formatting details.
- Keywords PDF**.
- Strategies for Figures and Tables PDF**. All about managing and fitting tables and figures, and their captions,. <http://www.lib.sfu.ca/help/writing/theses/msword>

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- Partial Copyright Licence:** Get the newest version of the Partial Copyright Licence (PDF) and its accompanying "Declaration". The PDF can be filled in in Adobe Acrobat or Adobe Reader then printed, or printed first and filled in by hand.  
<http://www.lib.sfu.ca/help/writing/theses/regulations>
- Human research?** Ensure you or your class obtained ethics clearance or a letter from the ORE saying your research is "minimal risk" not needing clearance. Obtain the Statement Ethics Review Statement one page pdf for insertion in all thesis copies.  
<http://www.lib.sfu.ca/help/writing/theses/regulations>

### Short questions?

- Deadline date and info:
  - Current term: see "Deadlines 2010-2011" PDF at <http://www.lib.sfu.ca/theses/> or Last Steps PDF.
- Check for a helpsheet on my webpage: <http://www.lib.sfu.ca/theses/>  
New helpsheets are added often, so be sure to check again.
  - Check the skills-related PDFs and links on my webpage for that topic:  
<http://www.lib.sfu.ca/help/writing/theses/msword>  
<http://www.lib.sfu.ca/help/writing/theses/helpsheets>

### Frequently asked questions...

- LaTeX user shortcuts**
  - LaTeX, as users know, is a more reliable program for producing a thesis that accommodates scientific and linguistic needs, but does not require highly individual formatting. Shortcuts:
    - Pay attention to the orange-marked requirements in "Reviewing Your Own".
    - Ignore the MSWord details.
    - Review your title page with the title page requirements in "Reviewing Your Own" to ensure accuracy of every line and feature, including the term of submission (NOT necessarily the term in which you defended).
    - Review your running heads and edit them to prevent the text from obscuring or pushing the page number into the margin.
    - Review your figures and tables to ensure they are within the margins.
    - Review your equation numbers, which may be pushed into the margin by large equations or other content. Edit the text to force a break at an appropriate location in the text or equation.
  - Most common omission: Check your table of contents to ensure that the Bibliography is included.**
  - Check your table of contents (Called just "Contents" in LaTeX to ensure that all preliminary page features, whether originally from the style files or added by you, are included.
    - Examples: Approval, Abstract, Dedication, Quotation, Acknowledgements, Contents, List of Figures, List of Tables, Glossary, List of Terms, List of Abbreviations, List of Schemes, etc.. Use the same sequence as shown in "Reviewing Your Own".
    - If not, then use the same and configurations in existing preliminary page headings to create the new headings.
  - Check your preliminary pages to ensure that features which you have NOT used are deleted
    - Example: if you do not have a List of Schemes, then delete that heading.

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- Refresh your Table of Contents to ensure these unwanted headings do not appear.
- Help on PDF print scaling and A4 paper configuration problems in “Printing Tips” at <http://www.lib.sfu.ca/help/writing/theses/helpsheets> or below in the FAQ section.
- Single most common error? Title page**
  - Title page details, including
    - Title as it appears on the signed Approval page
    - Your name and previous degrees, years and university names.
    - Exact degree (NOT “Master of Political Science”)
    - Accurate name of department (NOT “Department of Education or Department of Criminology).
    - Date of submission. (NOT month and year; not date of defence). Correct date is the term and year of submission to the Library, (i.e. “Spring 2010, Summer 2010, Fall 2010).
  - See “Reviewing Your Own” PDF again, <http://www.lib.sfu.ca/theses/> and talk to your department’s Graduate Assistant (Program Assistant).
- Margins? You need to get them right.**
  - See “Reviewing Your Own” <http://www.lib.sfu.ca/theses/>
    - The settings below will be sufficient to ensure margins are adequate for binding and microfilming.
    - Check to ensure that the margins are consistent throughout ALL sections of the document, including
      - the preliminary pages,
      - the main body pages,
      - and all sections of the document,
      - Landscaped pages, where the top and bottom margin measurement need to be the same as portrait page left and right margins.
      - especially where any material has been pasted in from other documents.
    - Use the 10% or 25% zoom to check pages and sections against each other. .
    - Note: Printing may cause some drift to the right and top due to a variety of factors in the printer/copier machines. **Do not panic!** It is okay if the shift to the left on the paper copies are merely, approximately the width of a letter “i”, or 1/16 (0.125) inch, or 0.3 cm.
  - Margin settings of document: Top and bottom**
    - No less than 1 inch (2.54 cm) top and bottom.
    - Page number placement is **within** the margin, no less than 0.5 inch (1.27 cm) from edge of paper.
  - Margin settings of document: Sides.**
    - Either 1.50 inch left/1 inch right (3.81 cm left/2.54 cm right)
    - OR NO LESS THAN** 1.25 inch left and right. Metric: 3.17 cm left and right. (Equal margins acceptable as of Summer 09)
    - Check for consistency throughout your document. Use the zoom at 10% to compare pages and sections.
  - Page numbering gone wrong again? Most expensive error. To fix - details in:**
    - “Reviewing Your Own” <http://www.lib.sfu.ca/theses/>

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- or "Debugging/Setting up Differential Page Numbering in MSWord" PDF at <http://www.lib.sfu.ca/help/writing/theses/helpsheets>
- Referencing Style Guides?** <http://www.lib.sfu.ca/researchhelp/writing/index.htm>
- The Theses Office does not advise on referencing requirements**, as this is a scholarly writing issue . See your senior supervisor, liaison librarian or the Student Learning Commons. Online resources are available. Start at: [http://www.lib.sfu.ca/researchhelp/writing/early\\_assistance.htm](http://www.lib.sfu.ca/researchhelp/writing/early_assistance.htm)
- Abstract length and editing**
  - Word count limits are strict: Master's degrees: 150 words max. Doctoral degrees: 350 words max. For help cutting an abstract see "Abstract Help" (pdf) at <http://www.lib.sfu.ca/help/writing/theses/helpsheets>
  - Tip:** Add a longer, more attractive "Executive Summary" or "Reader's Summary" immediately following the Abstract. See ""Reviewing Your Own"" pdf. This addition makes it less of a struggle to write the required, "bare-bones" 150 word Abstract.
- Keywords, and Call Numbers**
  - Keywords are selected from your own abstract, introduction and conclusion, if they are not already known to you.
  - A call number is "borrowed" from a book closely related to your own work, a book you would like your thesis to stand next to on the shelf. We use that call number to help identify a new, unique call number for your circulating library copy.
  - Quick steps to identify keywords and a call number: "Keywords" PDF at <http://www.lib.sfu.ca/theses/>
- Handling large or awkward tables and figures**
  - "Strategies for Figures and Tables" at <http://www.lib.sfu.ca/help/writing/theses/msword>
  - Fanfold pages: <http://www.lib.sfu.ca/help/writing/theses/helpsheets>
  - Landscape-oriented or large pages - page numbering and set-up:** See "Reviewing Your Own". Helpsheets and samples at <http://www.lib.sfu.ca/help/writing/theses/helpsheets>
- Printing, A4 Paper and printing from LaTeX-produced PDFs**
  - See "Reviewing Your Own" and "Last Steps" PDFs at <http://www.lib.sfu.ca/help/writing/theses/helpsheets>
  - PDF and LaTeX problems: avoiding scaling down of your document/fonts, glitches arising from LaTeX A4 paper configurations; hazards of PDF printing. See **Printing Tips** at <http://www.lib.sfu.ca/help/writing/theses/helpsheets>
- Partial Copyright and Ethics forms**
  - Both human and animal research are covered by requirement for inclusion of the Ethics insert. See Last Steps (pdf) at <http://www.lib.sfu.ca/theses/>
  - Forms available at <http://www.lib.sfu.ca/help/writing/theses/regulations> These can be filled in using Adobe Acrobat or Adobe Reader, then printed and signed, or printed first, and filled in by hand.

## Copyright - the short answers

- When borrowing the work of others, download and read this first:**
  - CAUT Intellectual Property Advisory** <http://caut.ca/uploads/IP-Advisory3-en.pdf>

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- Use Appendix A of this Advisory as your checklist for whether you are engaged in “Fair Dealing” toward those you have borrowed from.**
- Complete figures and larger portions of textual material, MAY NOT** require you to ask permission, under the “fair dealing” provision Canadian copyright law thanks to recent court rulings.
  - Check your usage by re-reading the CAUT Intellectual Property Advisory Appendix A. Check yourself by asking: “Is the full extent of the chosen borrowed material definitely the minimum required to be able to do a fair, respectful and competent criticism/review of that work?” If so, then it is probably safe to just cite properly.
- These items definitely do not need copyright permission:**
  - Ordinary citations, such as indirect quotes, words, short phrases and data, especially numeric data used to create or compile your own graphs and tables. Cite correctly.
  - Highly conceptual diagrams - outline maps not directly taken from detailed maps, generic outline drawings, where everyone's diagram would resemble everyone else's. Cite correctly.
  - Direct quotes cut to the minimum necessary to accurately represent the person you are quoting. Best to ask for permission from film companies. Check their websites for copyright contact information. Cite correctly.
- Including a previously published article as a chapter in your thesis:**
  - If you have previously published a chapter or section as part of a book, or as an article in a journal, or have it accepted but pending publication.
  - Check the journal's website for "information for authors" (or similar wording) to see if you have retained or given away your intellectual property, or if there is an exception for publishing a thesis.
- Including a NOT YET published article as a chapter in your thesis:**
  - If you have prepared an article under previously agreed-upon joint authorship, even if you are really the sole author, but have not yet signed over the copyright to the journal,
  - Then you must get permission from ALL your co-authors to publish it as part of your thesis, and you must credit all the co-authors in correct order of contribution. One email cc'ed to all the co-authors explaining the situation and how you will be crediting them, is usually sufficient to get their “Okay.”.
- More detailed information needed? Other copyright questions? See <http://www.lib.sfu.ca/collections/scholarly-communication/copyright> , Learn about Copyright section, and more.**

## Postponing or withholding a thesis/project from publication.

- Postponing publication for a year (non-renewable) or withholding it from the online PDF “Institutional Repository” both require special permission of the Dean of Graduate Studies.**
  - Find the information PDF and request forms at <http://www.lib.sfu.ca/help/writing/theses/regulations>

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## Done all that?

- Then you are ready for the “Last Steps” PDF**
  - UPDATED every semester.
    - Get current semester's edition at <http://www.lib.sfu.ca/theses/>.

## After my defence, what do I do?

- Get current term's (term) edition of “Last Steps” (pdf) for answers.** <http://www.lib.sfu.ca/theses/>
  - Work your way through it.

## Still want me to review your document?

**After your own review, sit calmly, and then make a decision:**

- Whether you are actually confident your work is ready for submission to the Thesis Office,**
- Or whether you want me to review it also.**
- Note that I do not do consultations for the purpose of helping you calm the “stage fright” or “eternal doubts”**
  - These are both normal at this time of “jumping off into the unknown.”
  - The best way to take of this kind of “bad nerves” – and to prepare yourself for future professional experience – is to learn to manage your own natural fears.
  - The best steps, if you are mostly suffering from the “bad nerves”, are to
    - go back to “Reviewing Your Own” PDF
    - and walk once more through ONLY the REQUIREMENTS,
    - Then try just being still and breathing deeply.
    - It works. as so many students discover.

## Email me with your specific remaining questions

- Describe as accurately as possible what you are having trouble with.**
  - What requirement of the thesis/project or essays,
  - Or what feature of your word processor (MSWord, OpenOffice, etc.),
  - From your questions, I will be able to consider if a visit with me is needed or whether the questions can be answered briefly by email or by pointing you to the existing helpsheets.

Hope this all helps,

*Penny Simpson*

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