

# Electronic Theses and Dissertations Center

## ETD Reviewer Manual



**OhioLINK**

An **OH·TECH** Consortium Member

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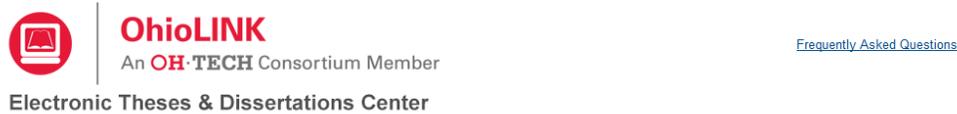
# PART I: ETD Center Basics

## Introduction

The OhioLINK Electronic Theses and Dissertations (ETD) Center is an open access repository containing nearly 50,000 ETDs from over 30 OhioLINK institutions. The published ETDs are available at <http://etd.ohiolink.edu/> for anyone to view. The ETD Center includes undergraduate honors theses, Masters' theses, and Ph. D. dissertations. For more information about the ETD Center and the ETDs, please see the FAQ on the website.

## Sign-up

Reviewing and publishing ETDs occur on a different website than the one to view published ones. Start at <http://etdadmin.ohiolink.edu/> and click "New User? Register Here!"



Welcome to the OhioLINK Electronic Theses and Dissertation Center  
All users must log in. If you don't have an account, click the "Register" link to create one.

The ETD Login form is enclosed in a light gray box with the title "ETD Login" in the top left corner. It contains two input fields: "Username" and "Password". To the right of the "Password" field is a "Login" button. Below the "Login" button, there are two links: "Forgot your password?" and "New User? Register Here!". An arrow points to the "New User? Register Here!" link.

If you are having problems logging in or need help submitting your ETD, please contact your Graduate Office for assistance.

**The OhioLINK Advantage:** Shared Services. Shared Resources. Powered by Member Participation.

Ohio Board of Regents  
25 South Front Street  
Columbus, Ohio 43215

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EDUCATION LINKS  
OH-TECH | OSC | eStudent Services | OhioLINK | OARnet |  
OACC | IUC | OTTA | ODE

Release 2.2.1

Screenshot: ETD login

Select "Institution Administrator/Reviewer Account" and a form will display.

The "New User Registration" form is shown in a light gray box. At the top right, there are "Cancel" and "Save and Continue" buttons. The main content area is titled "Select the Type of Account you are Requesting:" and contains two radio button options: "Submitter/Student Account" and "Institution Administrator/Reviewer Account". The "Institution Administrator/Reviewer Account" option is selected.

Screenshot: Select account type

Complete the form. Required fields have a red asterisk (\*).

**New User Registration** Cancel Save and Continue

Select the Type of Account you are Requesting:

Submitter/Student Account  
 Institution Administrator/Reviewer Account

---

**Name**

Last Name *	First Name *	Middle Name or Initial	Suffix ("Jr.", "III", etc.)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>For example: Shultz du Bois</i>	<i>Cathleen Jean</i>	<i>Marie François</i>	<i>III</i>

---

**User Information**

Email Address \*  (This will be your username)

Confirm Email Address: \*

---

**Institutional Affiliation**

Select your role with the Institution \*

ETD Administrator  ETD Reviewer

Select the Institution with which your account will be affiliated \*

Select the submission site(s) with which your account will be associated: \*

University  
 University Honors Theses

Screenshot: Sign-up form

As a Reviewer, your sign-up will need to be approved by the ETD Administrator at your institution. Contact information for all graduate school/offices of ETD Admins is at the end of this manual. You cannot use the system until you have been approved by your ETD Admin.

**Account Request** Return

- Your request for an account has been sent to the ETD Administrator(s) at your Institution for approval  
- Once approved, you will receive an email containing a temporary password at the email address provided while registering on the previous page  
- Upon your initial login, you will be prompted to reset your password

Screenshot: Sign-up confirmation

## Log in

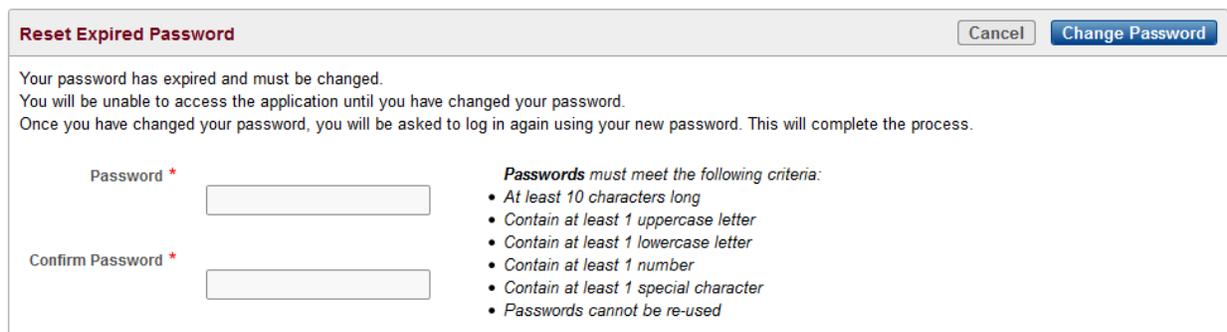
Once approved as a Reviewer, you will be sent a temporary password for initial log in. Sign in with it and your username (your email address) for the ETD Center at <http://etdadmin.ohiolink.edu/>.



The screenshot shows a web form titled "ETD Login". It contains two input fields: "Username" and "Password". To the right of the "Password" field is a "Login" button. Below the "Password" field, there are two links: "Forgot your password?" and "New User? Register Here!".

Screenshot: Login box

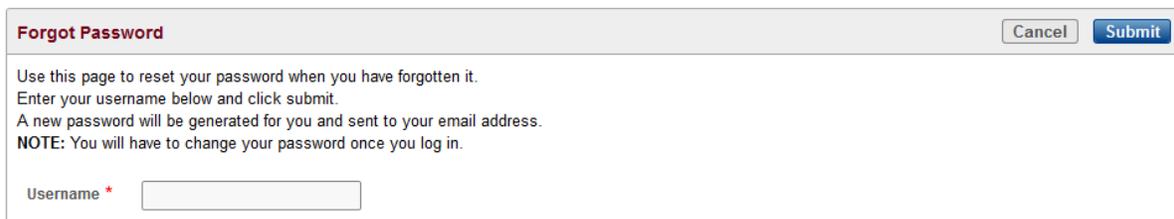
You will be prompted to create your own password that includes the requirements listed. Clicking "Change Password" updates it and redirects to the homepage where you can now log in.



The screenshot shows a web form titled "Reset Expired Password". It has a "Cancel" button and a "Change Password" button. The text reads: "Your password has expired and must be changed. You will be unable to access the application until you have changed your password. Once you have changed your password, you will be asked to log in again using your new password. This will complete the process." Below this text are two input fields: "Password \*" and "Confirm Password \*". To the right of these fields is a list of password requirements: "Passwords must meet the following criteria:" followed by a bulleted list: "At least 10 characters long", "Contain at least 1 uppercase letter", "Contain at least 1 lowercase letter", "Contain at least 1 number", "Contain at least 1 special character", and "Passwords cannot be re-used".

Screenshot: Create new password

Also, if you do not remember your password, you can click "Forgot your password?" to be sent a new temporary one. Make sure to use the username (email address) that you signed up with for the account.



The screenshot shows a web form titled "Forgot Password". It has a "Cancel" button and a "Submit" button. The text reads: "Use this page to reset your password when you have forgotten it. Enter your username below and click submit. A new password will be generated for you and sent to your email address. NOTE: You will have to change your password once you log in." Below this text is an input field labeled "Username \*".

Screenshot: Reset password

## Update contact information

Once logged in, click "My Profile" to update any contact information.

The screenshot shows the reviewer homepage. At the top left is the OhioLINK logo with the text "OhioLINK An OH·TECH Consortium Member". To the right are links for "Frequently Asked Questions" and "ETD Administration FAQ". Below the logo is the text "Electronic Theses & Dissertations Center" and "Welcome:". A navigation bar contains "Home", "My Profile", and "Reports". The main content area has a section titled "ETDs to be reviewed" with a table:

Status	Number of ETDs
Draft	0
Submitted	1
Returned to Submitter	0
Upcoming Embargo Status Changes	0

Below the table is a "Welcome" section with the text "Welcome to the Electronic Theses and Dissertations Center! To submit your Thesis or Dissertation, click the button below..." and a "Create New ETD" button. An "ORCID" section follows, stating "You don't have an ORCID associated with your profile" and a "Go To Profile" button.

Screenshot: Reviewer homepage

Any information can be updated, even password from here. Click "Apply All Changes" to save or "Cancel" to leave the page without saving. NOTE: Changing the Email Address in the User Information section will change your username for logging in as well.

The screenshot shows the "Maintain User" page. At the top left is the OhioLINK logo with the text "OhioLINK An OH·TECH Consortium Member". To the right are links for "Frequently Asked Questions" and "ETD Administration FAQ". Below the logo is the text "Electronic Theses & Dissertations Center" and "Welcome:". A navigation bar contains "Home", "My Profile", and "Reports". The main content area has a section titled "Maintain User" with "Cancel" and "Apply All Changes" buttons. The "User Information" section contains the following fields:

- Username
- Email Address \*
- Password
- Confirm Password
- Password Expires On: 21-MAY-15
- User Status \*: Approved (Active)
- User Role(s): • ETD Reviewer
- Institution \*: OhioLINK University
- Submission Sites: \*
  - OhioLINK University
  - OhioLINK University Art and Sciences Honors Theses
  - OhioLINK University Honors Theses
- First Name \*
- Middle Name or Initial
- Last Name \*
- Suffix: ("Jr.", "III", etc.)
- ORCID Identifier: orcid.org/

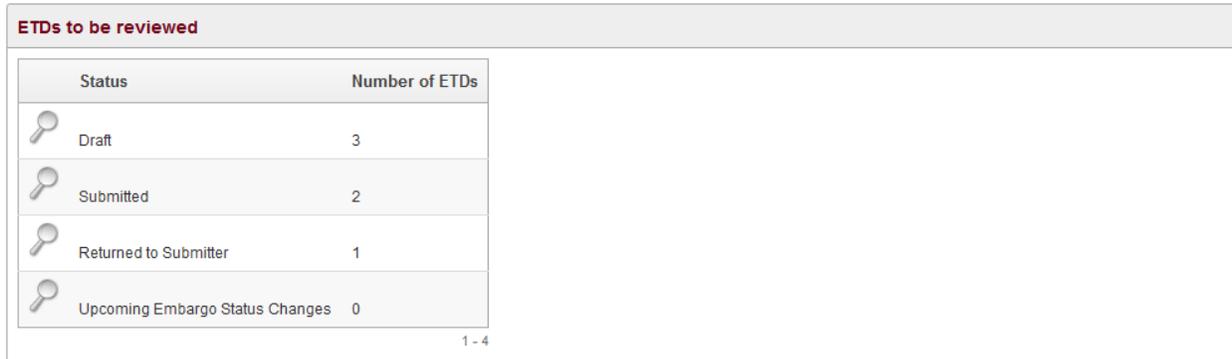
At the bottom right are "Create ORCID" and "Find Existing ORCID" buttons.

Screenshot: Update contact information

## PART II: ETD Review

### Starting the Review Process

When you first log in to the system, the prominent section “ETDs to be reviewed” shows the different categories for the ETDs. They contain the ETDs for the Submission Site(s) for which you are a Reviewer. Each institution can have one or multiple Submission Site(s) and the ETD Admin controls which one(s) that you review.



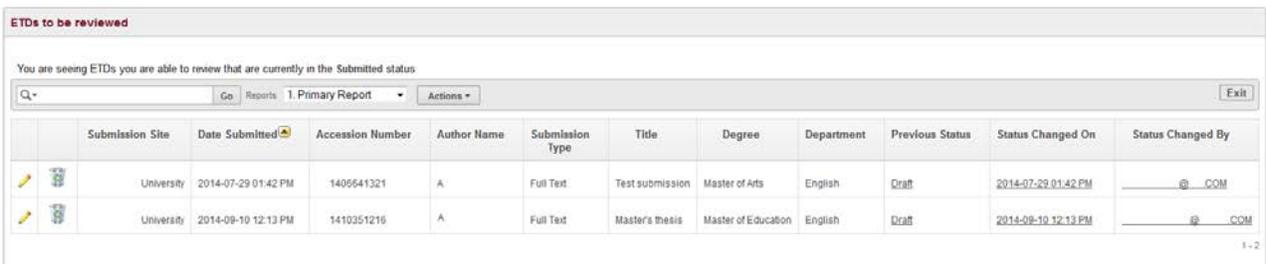
The screenshot shows a table titled "ETDs to be reviewed" with two columns: "Status" and "Number of ETDs". Each row includes a magnifying glass icon to the left of the status name. The data is as follows:

Status	Number of ETDs
Draft	3
Submitted	2
Returned to Submitter	1
Upcoming Embargo Status Changes	0

Page number: 1 - 4

Screenshot: ETD categories

The categories for as a Reviewer include: **Draft**, **Submitted**, **Returned to Submitter**, and **Upcoming Embargo Status Changes**. Only students can edit the **Draft** and **Returned to Submitter** categories, although you can go into them and view the submission forms in progress. **Upcoming Embargo Status Changes** shows the ETDs with delays that are ending next week or ended during the past week, which means that the text becomes available to the general public. **Submitted** has the ETDs that need approval for publication and will be the category you work with the most. Click the magnifying glass to see which ETDs are waiting to be published.



The screenshot shows a table titled "ETDs to be reviewed" with a sub-header "You are seeing ETDs you are able to review that are currently in the Submitted status". The table has columns for Submission Site, Date Submitted, Accession Number, Author Name, Submission Type, Title, Degree, Department, Previous Status, Status Changed On, and Status Changed By. There are two rows of data, each with a pencil icon and a recycle bin icon in the first column.

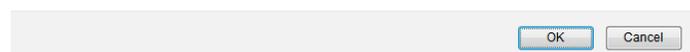
	Submission Site	Date Submitted	Accession Number	Author Name	Submission Type	Title	Degree	Department	Previous Status	Status Changed On	Status Changed By
	University	2014-07-29 01:42 PM	1406641321	A	Full Text	Test submission	Master of Arts	English	Draft	2014-07-29 01:42 PM	_____@.COM
	University	2014-09-10 12:13 PM	1410351216	A	Full Text	Master's thesis	Master of Education	English	Draft	2014-09-10 12:13 PM	_____@.COM

Page number: 1 - 2

Screenshot: Submitted ETDs needing approval

The pencil icon opens an ETD for reviewing. The recycle bin deletes the entire ETD submission form, which cannot be undone. A submitter would need to resubmit their ETD. A pop-up will ask you to confirm before it deletes it from your Reviewer queue.

Are you sure you want to delete this Submission? This operation is non-recoverable. Press OK to DELETE the record.



A dialog box with a light gray background and a thin border. It contains two buttons: "OK" and "Cancel".

Screenshot: Pop-up warning about deleting ETD submission

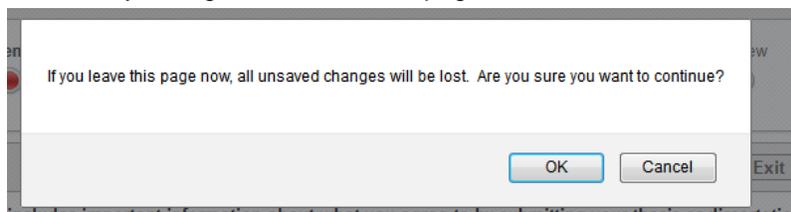
## Reviewing an ETD

Clicking the pencil icon will open that particular ETD's submission form. The progress bar and three buttons ("Exit", "Previous", "Save and Continue") remain at the top of each page. Also, clicking any of the circles in the progress bar will take you to that page but will not save any changes on the current page.



Screenshot: Progress bar and option buttons

Submission form controls: **Save and Continue** is the only button that will save any changes on the current page and will take you to the next page. Be sure to use this button before exiting the form. It not only saves but checks the formatting and markup validation in addition to required fields. If there is something missing or validation fails, the system will let you know. **Exit** leaves the ETD submission form and returns you to the submitter homepage without saving changes on the current page. A pop-up box will warn you before exiting and gives the option to Cancel and return to the current page. All other progress in the submission form is saved and you can return later to finish the submission. **Previous** takes you back a page but does not save any changes on the current page.



Screenshot: Exit button warning

As a Reviewer, you can change any field or take notes at the bottom of the page about the ETD. Make sure to check that any information required by your local policies is complete, as only certain fields are required by the system.

**Reviewer Notes**

Work Notes  
(Note: These notes are only visible to reviewers and administrators)

Notes to Submitter  
(Note: These notes are only visible to submitters, reviewers, and administrators)

Screenshot: Note fields on each page

**Work notes** are internal and only visible to other reviewers and administrators while **Notes to Submitter** are available to the submitter and should contain notes that you would like them to see about their ETD. The notes apply to all of the pages, not just the one that you are on.

To finish, on the Review page the **Save and Continue** button is replaced by two buttons: **Return ETD To Submitter** and **Publish ETD**.

The screenshot shows the 'ETD Submission Progress' bar with six steps: Agreement, Paper Information, Degree Information, Publication Information, Document Upload, and Review. The 'Review' step is highlighted with a red dot. Below the progress bar is the 'Submission Review' section, which includes buttons for 'Exit', '< Previous', 'Return ETD To Submitter', 'Publish ETD', and 'Save Comments'. The text below the buttons provides instructions on how to verify the information and what to do if buttons are missing.

Screenshot: Instructions and options for the Review section

**Return ETD to Submitter** allows the submitter to edit the ETD submission form to make any necessary changes that are required before resubmitting it. Make sure to specify the changes that the submitter needs to make in the **Notes to Submitter** field. If the ETD is ready to publish, click the **Publish ETD** button to make it available in the public ETD Center. If neither of these buttons show up then the ETD is either missing required information or you are looking at an ETD category other than Submitted, such as Drafts or Returned to Submitter which only submitters can edit. To determine missing information, visit each section of the progress bar and click **Save and Continue**.

## Submitting an ETD on behalf of a student

The main reason for a Reviewer or Admin to submit an ETD on behalf of a student is for a retrospective project in which the institution is scanning and uploading older theses and dissertations. On the Reviewer homepage, at the bottom there is an option to create an ETD. Click **Create New ETD** to get started.

The screenshot shows the 'Welcome' page of the Electronic Theses and Dissertations Center. It includes a welcome message and a button labeled 'Create New ETD'.

Screenshot: Create an ETD

The first thing is to select who the ETD is for: you, an existing user, or a new user. Most of the time, the submission will be for someone new to the ETD Center. However, you can search existing users, both active (a submitter who has used the current system) and inactive (created during "on behalf of" or users of the previous system).

The screenshot shows the 'Select User to Submit ETD For' dialog box. It has a 'Cancel' button and a 'Next >' button. The main area contains a section titled 'Submit ETD For \*' with three radio button options: 'Submit this new ETD for myself' (selected), 'Submit this new ETD for an existing user in the system', and 'Submit this new ETD for a new user to the system'.

Screenshot: On behalf of options

Selecting new user will display a sign-up for so that the system can create the new submitter account, which that person can use later. Certain fields are required, including citizenship, and are marked with a red asterisk (\*).

Screenshot: New user contact information form

Once the form is complete and saved, the ETD submission form will load and you can fill it out, upload the PDF along with any supplementary materials and publish the ETD. For more information about the submission process, including ORCID Identifiers, please refer to the OhioLINK ETD Center Submitter Manual.

## View options for list of ETDs

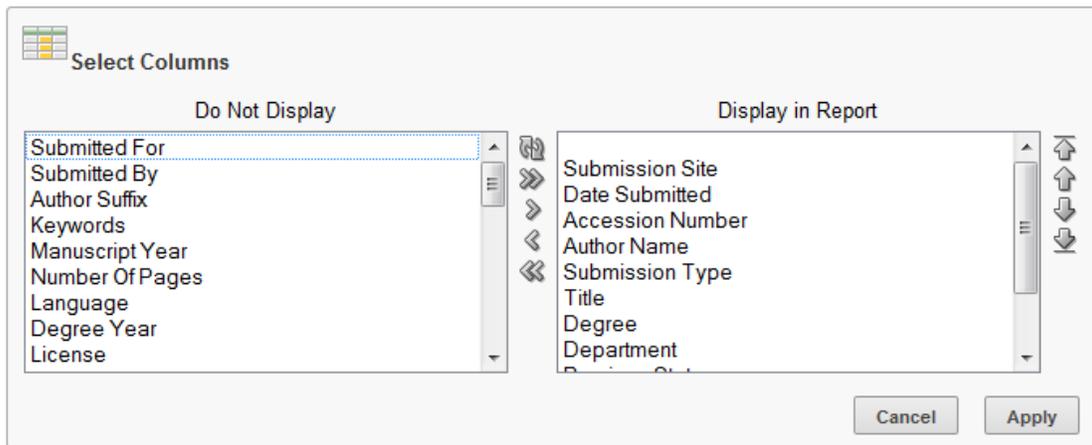
When looking at any of the ETD categories, there is a control bar with a search box, Reports dropdown, and Actions button. The default is the Primary Report but there is also an Embargo Report or you can create a custom one and save it for future use.

	Submission Site	Date Submitted	Accession Number	Title
	University	2014-07-29 01:42 PM	1406641321	Test submi
	University	2014-09-10 12:13 PM	1410351216	Master's th

Screenshot: Action options for viewing ETDs

Clicking "Actions" then "Select Columns" shows all of the options that are available and the one currently

shown in the report. Add, remove, and rearrange them based on your needs with the arrow keys.



Screenshot: Controls for choosing which information to include in report

“Apply” selects the preferred information to display and runs the report based on the new columns. If you find a combination that you want to save for future use, click “Actions” again and select “Save Report”. A saved report is only available for your account, though other Reviewers could set up and save the same one for themselves; this might be helpful for Reviewers of the same submission site(s).

## Part III: Troubleshooting and Tips

### ETD Administrator Contact Information

Each institution has an ETD Center Admin as the main contact for questions and issues with ETDs and the submission process. Find yours at: <https://www.ohiolink.edu/ETD-Admin-roster>

### Embargos/Delays

Students may ask for an embargo or delay on their ETD, or a takedown of a previously published ETD. These are dealt with at each institution based on local policies. Contact your ETD Admin with any questions or requests, including any other changes to a published ETD.

### System Emails

The ETD Center sends system emails for many different reasons, including submitted or published ETD notifications. If a student replies to one of these emails, please have them change the “To” field from [etdadmin@lists.ohiolink.edu](mailto:etdadmin@lists.ohiolink.edu) to yourself as Reviewer or your local ETD Admin. At OhioLINK, we forward these to who the student writes to in the email but it is faster if students know who to send questions to especially concerning resubmission of ETDs.

### ETDs and Submitters from Previous System

In 2013, the ETD Center was rebuilt with a new system that included the addition of submitter accounts. ETDs from the previous were imported into the new and those students had accounts created for them. They can log in and use the account to see their past submission or contribute another ETD. To do so, they will use their email that is associated with the previous ETD and click “Forgot Password?” on the homepage to activate their account and send a temporary password.

### Avoiding duplicate ETDs

The submission form for an ETD can be edited and changed as needed. A new one does not need to be created since it will result in a duplicate.

### Reports and statistics

One additional area in the ETD Center is Reports, which contains statistics for the entire ETD Center and its contents. The different statistics include: space utilization, count or number of ETDs, and downloads. The default view is a pie chart with all of the institutions with published ETDs but each school (or submission site if there are multiples) can be viewed individually as a bar graph that shows the year-over-year trends. Tabular data is also available and can be downloaded. The final report is ProQuest/UMI transfers that shows what has been sent in the past 60 days and what is ready to be sent for those who participate, which is set-up by your local ETD Admin.

## ETD Validations

This section describes validations performed on each page by item. Imported ETDs were not validated against these checks and upon review they will be enforced.

Page	Item	Validation
Agreement	Institution/Unit	Required
	Submission Type	Required
	Terms and Conditions	Required
Paper Information	Author First Name	Required
	Author Last Name	Required
	Title	Required, HTML formatting
	Abstract	Required, HTML formatting
	Keywords	Semicolon delimiter, only contains letters, numbers, spaces and dashes
	Subject Headings	At least one required
	Year Completed	Between 1800 and Current Year + 1
Degree Information	Degree	Required
	College, School, Dept, Program	Required
	Degree Year	Between 1800 and Current Year + 1
	Advisors (Order, First Name, Last Name)	At least one required
Publication Information	Copyright	One required
	Delay Period	Required if Requesting Delay=Yes
	UMI type	Required
	UMI Copyright	Required based on Upload to UMI type selection
Document Upload	Document Type	Must have one, and only one "Thesis/Dissertation" type document.
	Document Upload	1GB file limitation