Electronic Theses and Dissertations Center

ETD Reviewer Manual

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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!"

Screenshot: ETD login

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

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.)
For example: Shultz	Cathleen	Marie	III
du Bois	Jean	François	

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 *

[University ▼]

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.
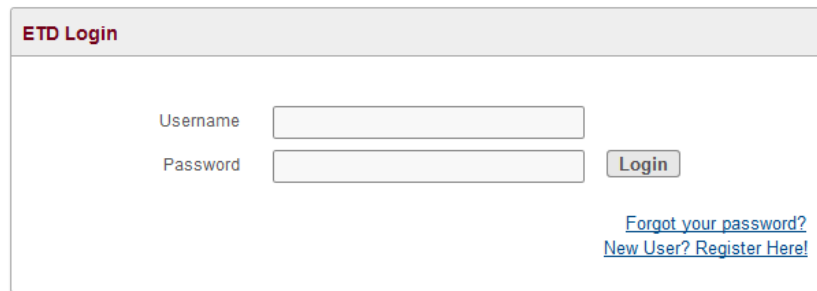
Account Request | Return

- 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
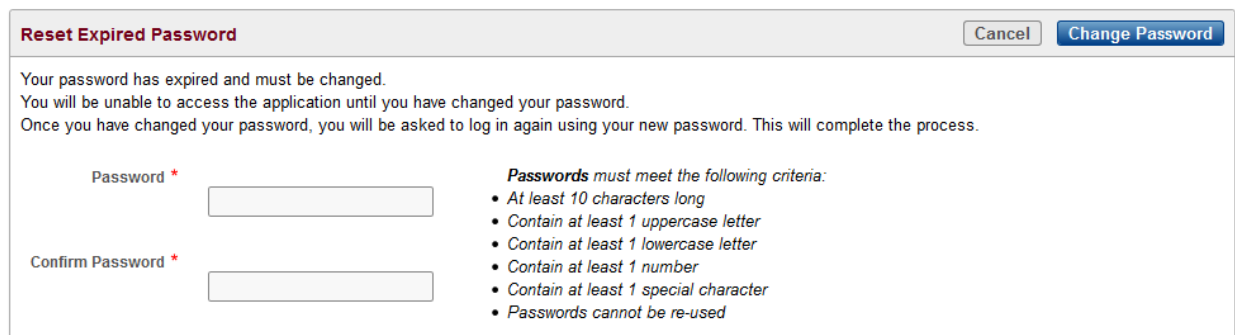
Screenshot: Sign-up confirmation

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/.

ETD Login

Username	
Password	Login

Forgot your password?
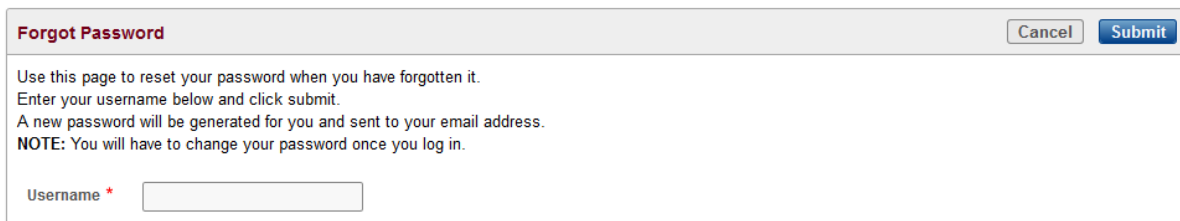New User? Register Here!

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.

Reset Expired Password   Cancel   **Change Password**

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.

Password *

Confirm Password *

Passwords must meet the following criteria:
- *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*
- *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.

Forgot Password   Cancel   **Submit**

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.

Username *

Screenshot: Reset password

Update contact information

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

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.

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.
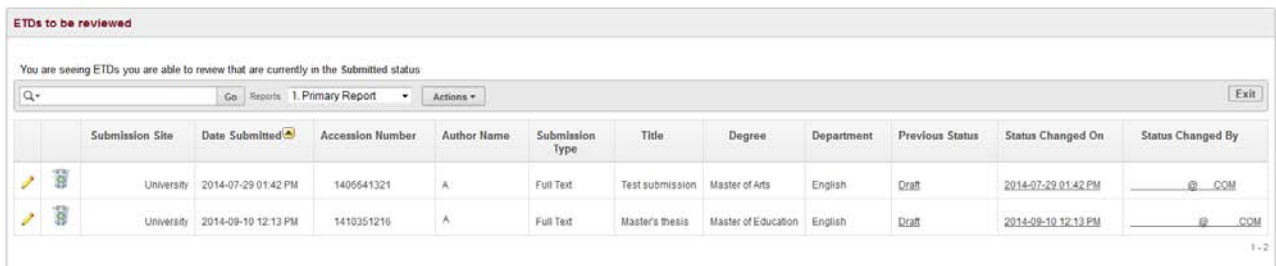

Screenshot: ETD categories

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.

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.

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.
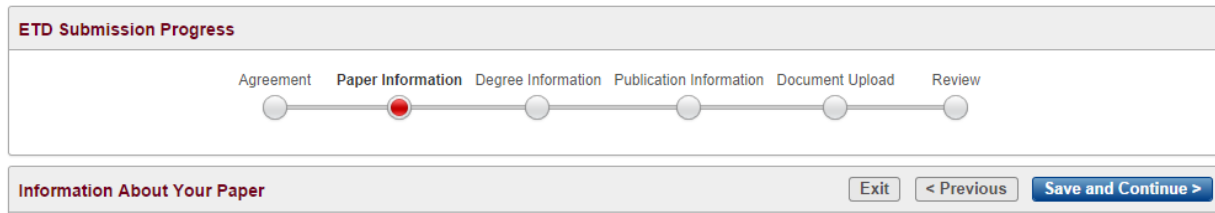
Screenshot: Progress bar and option buttons

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 do not save any changes on the current page.
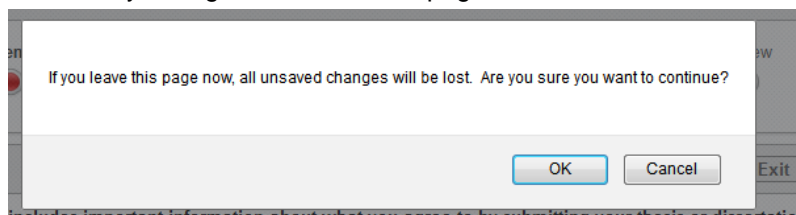
Screenshot: Exit button warning

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.

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**.

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 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.

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).

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 user 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.

Screenshot: Action options for viewing ETDs

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

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shown in the report. Add, remove, and rearrange them based on your needs with the arrow keys.
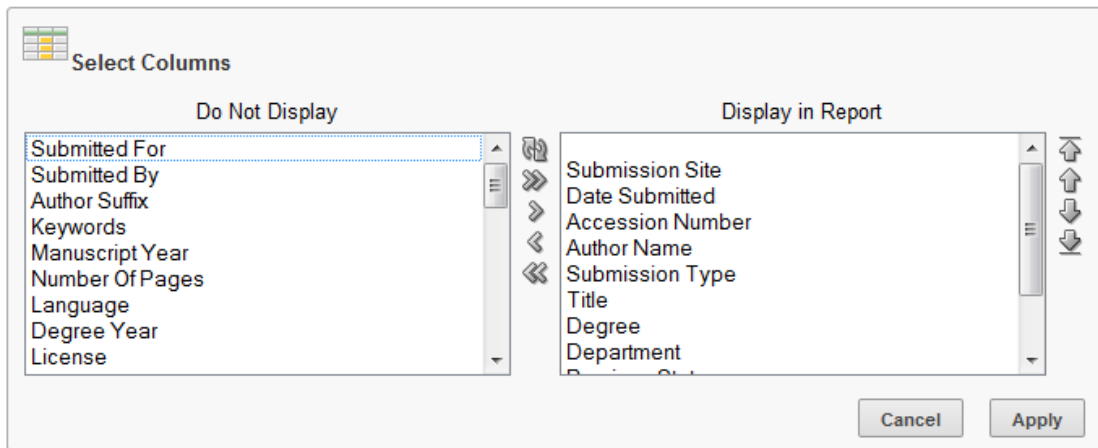
Screenshot: Controls for choosing which information to include in report

"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 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