Video Transcript:
The Reviewer Workflow in an ETD Series

Video Duration: 15 minutes, 23 seconds

Hello and welcome. The title of this video is "The reviewer workflow in an ETD series".

This video outlines the administrator and advisor workflow for managing the advisor feedback in a Digital Commons Electronic Theses and Dissertations series.

Once you've received a submission for your ETD series, and it's ready for the appropriate advisor to review, you'll first navigate to the submission in "Manage Theses/Dissertations" and go to the Reviewers link in the sidebar.

Now the reviewers section will be where the entire review process takes place for the ETD administrators, so this is where we will be returning several times during this video as the review process moves forward.

So to begin, we go to the reviewers section, and here we can choose reviewers from our Master List of Reviewers. By default, all authors are also added to the Master List of Reviewers. If you would not like this to be the case, please contact Consulting Services.

We also have the option of entering a new advisor if that advisor has never done a review for us before by clicking "Enter New Reviewer". So I will go ahead and do that right now. We simply fill out the information about this advisor, including first name, last name, an email address.

We can check a box to add them to the Master List of Reviewers if we think that we will want reviews from this person again in the future. And then I will click on "Suggest Reviewer."

Now this person already has an account in Digital Commons, so what the system has done is it's taken the way the advisor's name appeared in the account and used it for the review here. So even though I entered it as "ETD Advisor," the account information has overridden that.

Currently, the status of this reviewer is "suggested," which means that the advisor does not yet know that we are expecting a review.

This gives us the opportunity to first look at the advisor's review history to see what past reviews they have done for us. In this case there are none, but we can also look at the advisor's History to get a little bit more detail about the work they have done for us.

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This gives us information such as whether they have any outstanding requests, meaning that we are still waiting for them to confirm or reject our request to do a review for us, and how many reviews they are currently assigned to, meaning how many reviews they have already committed to doing.

If they have done a review in the past 45 days, there will be an x in this column. The number of reviews they have done in the past 12 months will appear here, and it will also give us the number of turnaround days that it takes them to do their review in this column.

If we want to enter notes about this advisor, we can do so in this text field here. The advisors themselves never see notes that we keep about them.

So we have taken a look at this advisor, and we have seen that this advisor does not currently have any reviews that they are working on, so we will go back to the previous screen, and now we know that we can go ahead and request a review from them.

I will go ahead and click on "Request." This gives us the ability to send a review request to them.

We have two options for when that review will be due. We can either set a hard date, in which case the review will always be due on a specific date, and we can enter a date here to override the default of 21 days from today's date.

We can also set a soft date, which means that those 21 days will only start counting once the advisor has actually committed to doing the review, so the days that it takes the reviewer to get around to committing to the review will not count toward those 21 days.

If we would like to change the email that is sent to this advisor, we can do so down here. There is a note reminding us to leave the words DAYS ALLOWED in place here; we should not change that. The link here is what the advisor uses to get to the review from the email, and down here is the abstract of the thesis or dissertation. So those three sections are the parts that we usually recommend that you do not change.

Otherwise, you can change the text here, specifically for this advisor. Keep in mind that if you would like to change the default text for this email, you should contact Consulting Services.

For this email I will go ahead and send it as is, and now we have sent a review request to this advisor.

We have a couple of options: we can send the request again; we can withdraw the request if we have changed our minds; or if the advisor has contacted us outside the system to let us know if they can or cannot do the review, then we can commit for them or decline for them, if they don't want to or cannot at the moment log in to do that themselves.

But for now, I will go ahead and log out, and I will log in as the advisor to complete the review process.

So the advisor has received the email that we just sent containing a link to go straight to the submission. In this case we can also go to our My Account page, and as the advisor, we will see a link to the paper on our My Account page as well.

So I will just follow this link on the My Account page, and it takes me to a screen where I can download the PDF, and it's up to you as the ETD series administrator whether the reviewers should be allowed to download the PDF before they have committed to doing the review. If you would like us to change that setting, just let us know at Consulting Services.

The advisor can also download the native file from the revision history box below the PDF button. This can be helpful if the student has uploaded their thesis or dissertation as a Word file, and the advisor would like to use a word processor to track their comments on the ETD.

And now, as the advisor, we can say whether we will review the thesis or dissertation or not. In this case, I will review it, so I'll click that box. At this point, the ETD series administrator receives an email letting them know that the advisor is working on this review now.

The advisor also receives Reviewer Guidelines, which is an email that's sent to the advisor with some formatting information for how this thesis or dissertation should be prepared. If you have your own formatting requirements, then it's probably a good idea to take a look at the default wording of this email and possibly change it for your ETD series. If you would like to see what this email says by default, please contact Consulting Services.

So now, as the advisor, I can either submit my review or let the ETD administrator know that I will not be able to complete the review. I can also email the ETD administrator if I have questions.

Now I will go ahead, and I will submit this review. And here I can share my thoughts and otherwise vet the thesis or dissertation that I have read.

I can either upload my report as a Word or RTF file. I also have the option of uploading the report as a PDF file. In both these cases, the properties of that file will be stripped away, so that, if the computer has saved information to the file saying that it was created on so-and-so's computer, that information is then removed from the file.

We also have the option of submitting the report as plain text, which I will go ahead and do right now. The plain text reports are not converted into PDF.

Now we have the option of recommending a decision to the ETD administrator. These are recommendations that the advisor makes for the next appropriate action on the ETD administrator's part; they do not in any way force the ETD administrator into taking any of these actions.

So I'll go ahead, and I'll say that this submission should be accepted.

Finally, the advisor has the opportunity to upload a confidential Cover Letter that will only be seen by the ETD administrators.

So once we have filled out all these sections, we will go ahead and submit our report. And now, our job as the advisor is over, and so I'll go ahead and log out.

At this point, the ETD administrator has received an email letting them know that the review has been received, and now we will log in as the ETD administrator to take a look at the review. So we log in.

From there, we go back to "Manage Theses/Dissertations", and as I said earlier, the entire review process is handled in the "Reviewers" link at the article level, and then here in the sidebar, I'll click on the "Reviewers" link, to return there.

And here I will notice a new section called "Submitted Reviews", which allows me to see the review and when it came in. I can see the recommendation that the advisor made, and I can also take a look at this review by clicking on "View." On this screen, I get a little bit of information as well, about when it all took place. I can see the Cover Letter, and I can download the Referee Report, which in this case is a text file.

Getting back to the Reviewers screen for a moment, I should mention that we can hide any review from the authors.

We can also either ask for a new review from the advisor by clicking "Request a Rereview" or we can make the changes to the review ourselves and then upload it for the advisor. If we choose to upload a report on an advisor's behalf, it will look to authors as if the advisor had actually uploaded it themselves so authors will not be able to tell that we had to make those changes as editors.

For now, I will go ahead and leave this review unhidden, and I will change the reviewers allowed for this particular submission to just one, because we only need one review for this submission.

Now that we have received a review, we will go ahead and click on "Register Decision" in the sidebar, and make a decision based upon our advisor's suggestion. Keep in mind that the author will not be able to see the reviews that were received until a decision has been registered.

So, in this case, even though the advisor recommended that I accept this submission, I will instead ask for major revisions to be required for acceptance. There is more information about registering decisions in a separate video. In this case, I'll just go ahead and register the decision.

So now that a decision has been registered, the email was sent to the author letting them know that the decision has been made, and that they can follow a link in that email to see the reviews.

I'll go ahead and log out, and I will log in as the author this time to take a look at those reviews that were received.

So I can either follow the link in my email or I can go to my My Account page and go from there. I'm going to log in to "My Account" page. As you can see, there's a section now on the author's page where they can see the reviews. In this case, I can open up the review that was received by clicking on the title.

And now that I am logged in as an author, I can see the review, and I can see that I am being asked to submit revisions, and of course normally that email would have told me what revisions to make.

I can click on "Revise thesis or dissertation," from there I can upload a new version of my ETD, which addresses my advisor's comments. When I am finished I will click on "submit", and my revision is complete, and I can log out as needed.

This concludes the reviewer workflow for ETDs in Digital Commons. For your reference, we have additional videos on how to manage other ETD workflows.

If you have any questions, please contact Consulting Services.

[Contact information on screen: dc-support@bepress.com, 510-665-1200, option 2.]