คู่มือภาษาอังกฤษสำหรับเจ้าหน้าที่ห้องสมุดฉบับปรับปรุง

(Librarian Manual)

โครงการพัฒนาระบบกำกับคุณภาพมาตรฐาน การจัดทำและบริหารจัดการ
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1. Introduction

1.1 Objectives

Integrated Thesis & Research Management System (iThesis) was developed for the effective use in management of thesis and research. It is the facilitating tool for students to construct any dissertation and independent study which helping them to: (1) Create a thesis template according to the specified document format (2) Create thesis plan (3) Submit thesis proposal, draft version, and complete version to their advisors (4) Record their test results, theses and dissertations, and the thesis paper. (5) the complete version of thesis file will be fully collected and stored in the Intellectual Repository (IR) of the institution in order to facilitate the library to provide an effective research database for students, then it would be sent to the Office of the Higher Education Commission (OHEC) for storing in Thai Digital Collection for the public dissemination.

This librarian manual is created on the purpose of iThesis's working procedures elaboration and guiding on how to use iThesis Web portal.

1.2 Definitions

As the name titling for doctoral thesis and master's thesis (plan A) are different in each institution, for example, some universities call doctoral thesis as dissertation, while some universities call both doctoral thesis and master's thesis (plan A) as thesis. To understand in the same direction, iThesis would call 'Thesis' for both doctoral and master's thesis (plan A).

In addition, the term of master's thesis (plan B) are also different in each institution, for example, some universities call it as thesis and some universities call it as Independent research. Therefore, on the clarification in this manual, the definition of 'Independent Research' will be used for master's thesis (plan B), but in some cases of general process, iThesis would use 'Thesis' instead.

Proposal provides the definition of both Thesis and Independent Research Proposal.

Draft version provides the definition of both Thesis and Independent Research.

Complete version provides the definition of both Thesis and Independent Research.

Note: The requirement on proposal and draft version is not the standard requirement for all institutions as it depends on the policy, which is an optional.

1.3 iThesis

iThesis is the integrated thesis and management system that set the framework on how to write, plan, and manage the thesis in form of proposal, draft version, and complete version, along with the convenience on direct submission process to advisors and graduate staff.

iThesis would effectively help students to strongly understand and be aware of plagiarism, both intentional and unintentional way which the system will examine the resemblance of the thesis through the program of Plagiarism detection named "Akkrawisut" and the system would probably use the tested results from other programs as well in case the educational institution requires the results from more than 1 program.

The usage functions are divided into two main parts which are web portal and iThesis Add-in which is an extension installed on Microsoft Word. These two main parts are working together, for example, when there's an editing data on the form in Web portal, or there's a change in the name of thesis examination committee other information on the Electronics form menu, thesis template that was created by Add-in function will also be automatically updated in order to ensure that the information appearing in every section is consistent.

Note: Librarian have authorization to access in Web portal only.

The overview of iThesis operations can be described in the following diagram
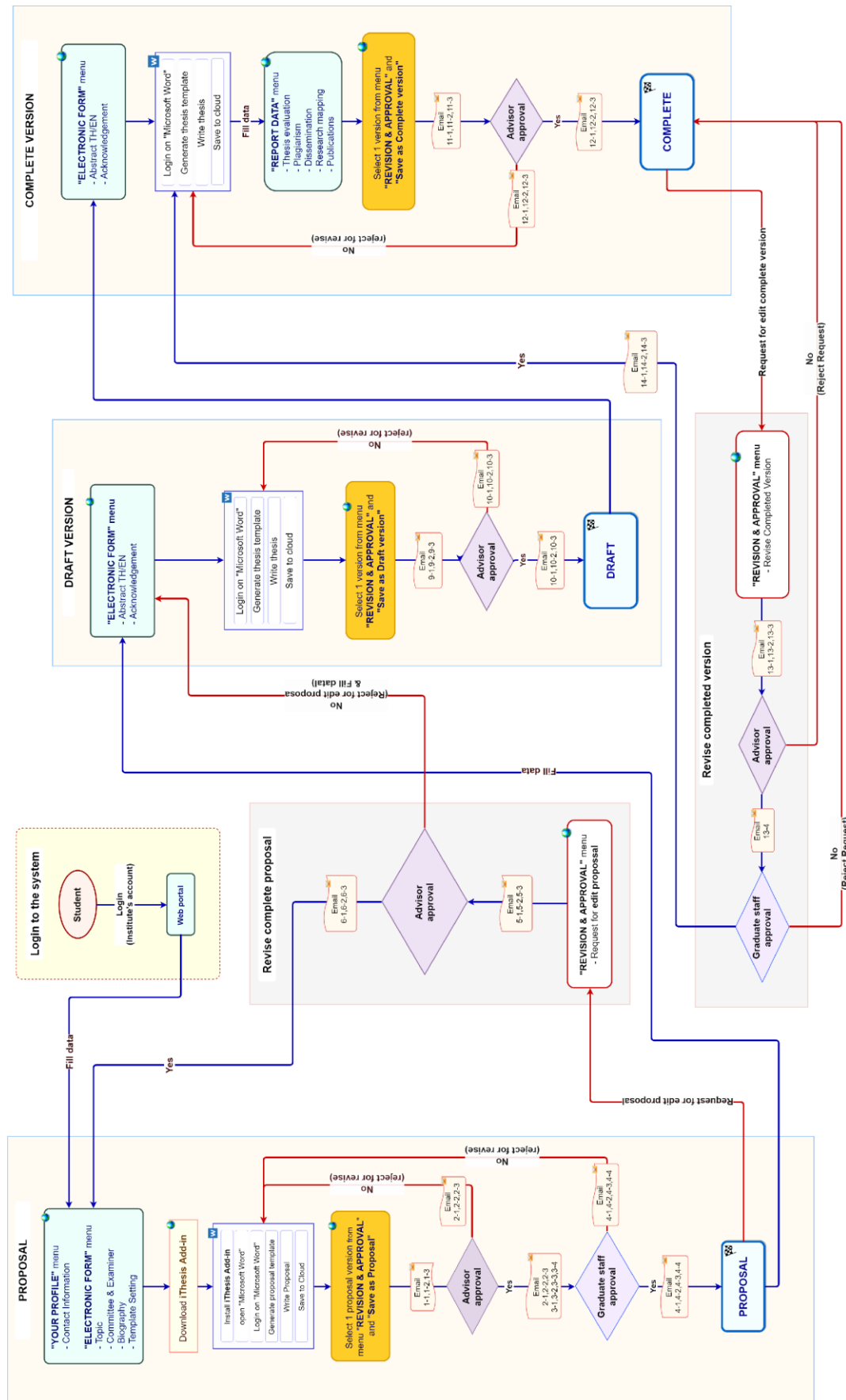
Figure 1: Workflow of iThesis operations

1.3.1 Web portal

Web portal was designed for 5 different user groups, which are system administrative officer, graduate staff, librarian, advisor, and graduate student. Therefore, the functions in each group will be different. In this document, there will be only the discussion on how to use the web portal for librarians.

Basically, web portal for librarian can be divided into two parts (1) The import of able-to-disseminate thesis files into the Intellectual Property (IR) of the institute, and (2) The transferring of thesis files to the Office of the Higher Education Commission. The discussion will be provided in the following topics.

1.3.2 iThesis Add-in

iThesis has the work-mode on Microsoft Word but the users have to install the 'add-in' program first. There are two versions;
- x86 version for a 32-bit operating system computer
- x64 version for a 64-bit operating system computer

To install the Add-in, the program version has to match with the operating system of your computer and it must be installed on Microsoft Word program in version 2010 or higher which is running on Windows only.

iThesis Add-in provides various facilitating tools for users that as writing templates, saving files and storing into the IR system. The group of users involved with the iThesis Add-in are graduate student, advisor, and graduate staff.

1.4 Email

iThesis will send an email to user who involved in the main working process, including of advisor, co-advisor, graduate staff, and graduate student. The email can be classified into 3 types which are as follows;
- <u>Request for approval</u>, there will send an attached link to connect to iThesis approval form, or it can be checked and approved via logging-in to the web portal system.
- <u>Notification of approval</u>, the email will inform the status of thesis 'approval' process.
- <u>Notification of approval on system-accessing authorization</u>

1.5 EndNote

The EndNote program, performed by Thomson Reuters, can help users collect reference or any bibliography relating to the content of the user's thesis. There are various reference formats provided for the users, such as APA16 and Numbers, which is customizable based on the specified format of their institutions. The main user group for Endnote is graduate student and the using details will be discussed in Graduate student manual.

1.6 Zotero

The Zotero program is an open-source software or free software that discloses its sources of technology. Zotero can be used for managing references and importing it into bibliography lists automatically. The program will store information than obtained from various sources in the file format, link format facilitating users to manage their bibliography and related research papers effectively.

2. Operations of Librarian

Librarian will active through the web portal as the main duty of bringing students' complete theses version into the Intellectual Repository (IR) and transferring it to the Office of the Higher Education Commission (OHEC) respectively.

According to Figure 2, showing the diagram on operations of librarian, there are two menus including Intellectual repository (IR) and Thai Digital Collection.
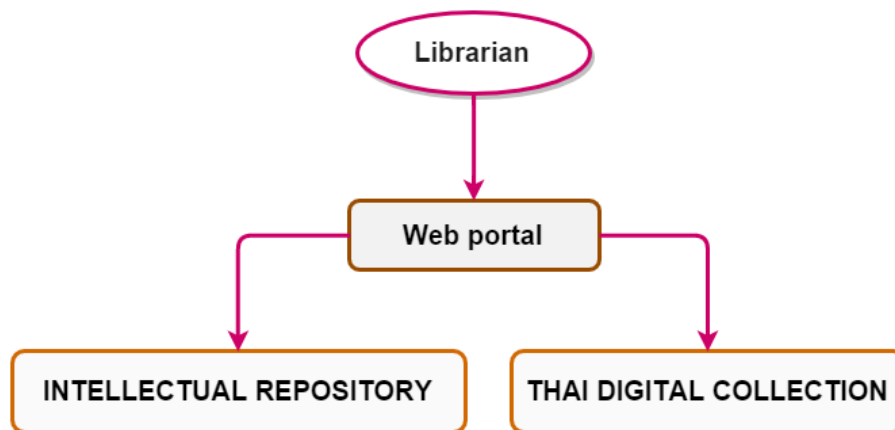

Figure 2: Workflow of Librarian operations on web portal

Overview mechanisms

Using of iThesis, the complete thesis files will be created by users of library or IR users and directly stored in Intellectual Repository (IR) before tranferring to TDC-AS, as shown in Figure 3. Once the transmission is complete, TDC staff can access the portal system to check any stored files in the warehouse.
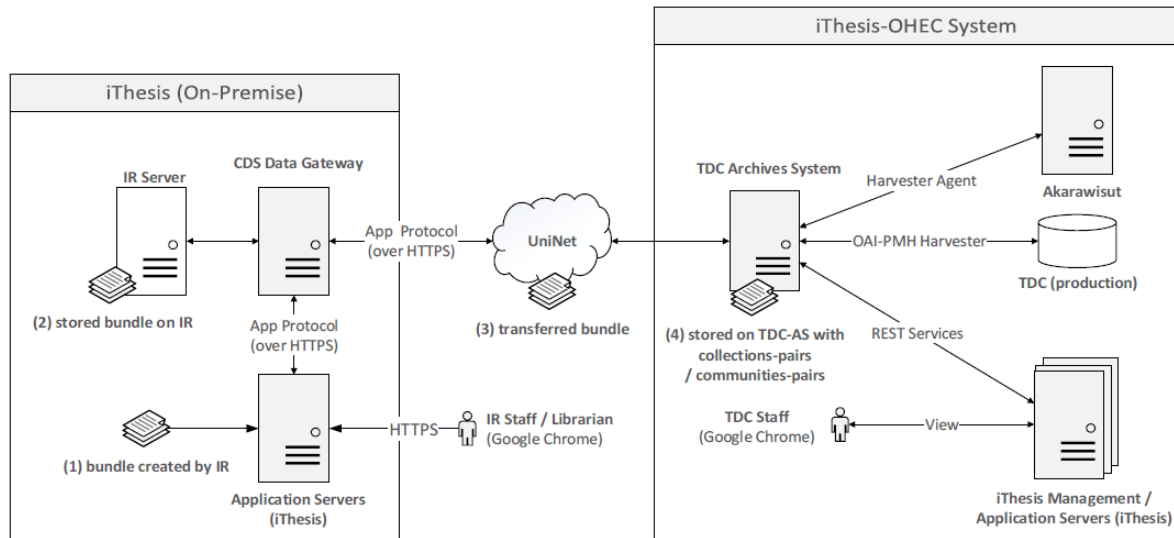
Figure 3: Workflow of thesis submission process to the IR and TDC

Transferring the files into TDC, iThesis of any university will connect with TDC of OHEC, with secure HTTP via the input of command from Librarian/IR staff, to intermediate server of CDS Data Gateway, transferred through UniNet, and send the signals to TDC-AS (TDC Archives System) to prepare storing the complete thesis files into their system. However, the process will occur after the files were stored in IR.

After signaling to TDC-AS, the following process is to create a job queue for TDC-AS to manage the time and set the transfer rate from iThesis to TDC-AS. The transmission occurs under the system policy of university that IR staff and librarian can store thesis files into TDC-AS at any time (on-demand transfer). Hence, it allows operators to early make plans, to be able to estimate workload and workforce immediately, and to reduce any workload in network system at the same time using job scheduler.

3. The use of web portal

To use the web portal, librarian need to login with your username and password first in order to access the menus provided. The log-in form on user-interface will be arranged on the right-hand side on the homepage of web portal, as shown in Figure 4.
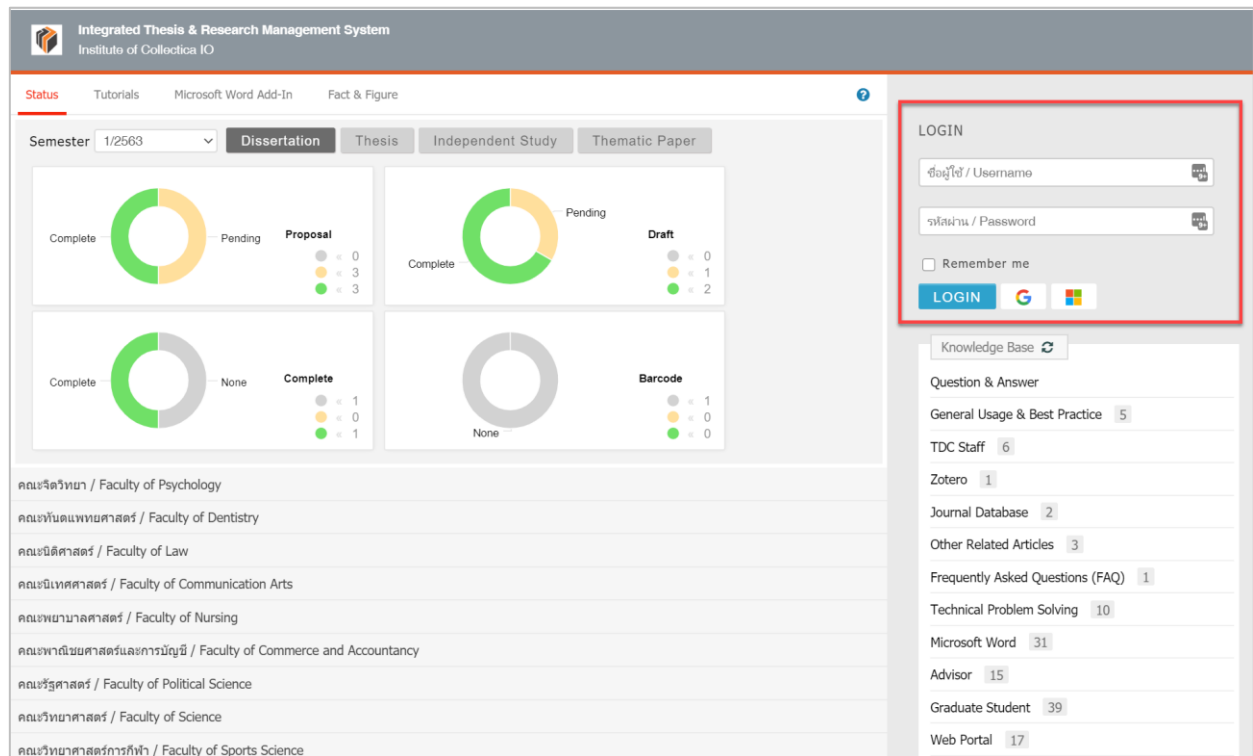

Figure 4: The user interface of login form on web portal
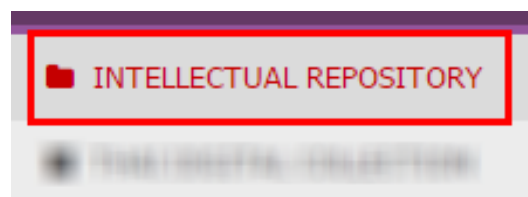
3.1 Intellectual repository menu

Figure5: INTELLECTUAL REPOSITORY MENU

The Intellectual repository menu is used for managing complete thesis files that would be imported into the University Intellectual Repository (IR). The format of importing data into DSpace program consist of (1) Authorization to use meta data files, Dublin Core and (2) Thesis files in PDF format.

There are 4 submenus under intellectual repository. The guideline on how to use each sub-menu are as follows;

3.1.1 Transfer & Export

Use for sending the complete thesis version to IR, the methods are as follows;

Figure 5: The example of transferring ready-to-export thesis

1. Select on faculty that would like to submit the file to.
2. The system will display searching results which can be divided into two case as follows;

   - In case of no complete thesis file found

     The system will show the result as in Figure 7, "Not found complete thesis or independent study" meaning that the faculty has no thesis ready to export.

Figure 6: The interface showing no complete thesis found in Transfer & Export

   - In case of complete thesis files found

     The system will show the result as in Figure 6, displaying the total number of complete thesis that are ready-to-export to IR at the end of school name and showing the list of students who select to disseminate their theses through website, or reaching the due date of dissemination of their thesis.

3. Tick on the student name that user wants to send their thesis to IR or Check All to select all names that appear.

4. Click the Transfer button for sending the thesis files to IR.

3.1.2 Configuration

Use of connecting iThesis to IR, dividing the connection configuration into 2 parts which are as follows;

Figure 7: Configuration

1. Secure shell configuration (SSHv2) is the configuration on channel to transmit data from the system to IR. There are 3 forms that you need to fill out (1) SSH Address or IP Address of the destination server, (2) SSH Username, and (3) SSH Password.

2. Digital intellectual repository configuration (DSpace) is the configuration on accessibility to IR There are 3 forms that you need to fill out (1) DSPace Address or IP address of the DSpace which collects thesis data (2) DSpace cli path or the determinant route to DSpace and (3) E-Person username or username for getting to DSpace.

3.1.3 Collections

Use for checking, editing, and adding information of Collection ID which is the number that identify the faculty on DSpace, as in Figure 9. There are 3 functions on using this menu which are as follows;

#	Faculty name	Collection ID
	Transfer & Export	Configuration	Collections	History
1	College of Management	123456789/50
2	Faculty of Psychology	123456789/67
3	Faculty of Dentistry	123456789/58
4	Faculty of Law	123456789/62
5	Faculty of Communication Arts	123456789/57
6	Faculty of Nursing	123456789/64
7	Faculty of Commerce and Accountancy	123456789/56
8	Faculty of Medicine	123456789/63
9	Faculty of Pharmaceutical Sciences	123456789/65
10	Faculty of Political Science	123456789/66
11	Faculty of Sports Science	123456789/69
12	Faculty of Engineering	123456789/60
13	Faculty of Fine and Applied Arts	123456789/61
14	Faculty of Economics	123456789/59
15	Faculty of Architecture	123456789/54
16	Faculty of Allied Health Sciences	123456789/53
17	Faculty of Veterinary Science	123456789/70
18	Faculty of Arts	123456789/55
19	Graduate School	123456789/71
20	College of Population Studies	123456789/51
21	Petroleum and Petrochemical College	123456789/74
22	Faculty of Science	123456789/68
23	Language Institute	123456789/72
24	College of Public Health Sciences	123456789/52

(1) Save   (2) Reset config   (3) Export as CSV

Figure 8 Collections menu

1. <u>Adding or editing information,</u> after you have done on adding or editing the information, clicking the save button.
2. <u>Reset config</u>, when you want to clear all the Collection ID, clicking the Reset config button

3. <u>Exporting CSV file,</u> when clicking on Export as CSV, you can save the CSV file as in Figure 10.
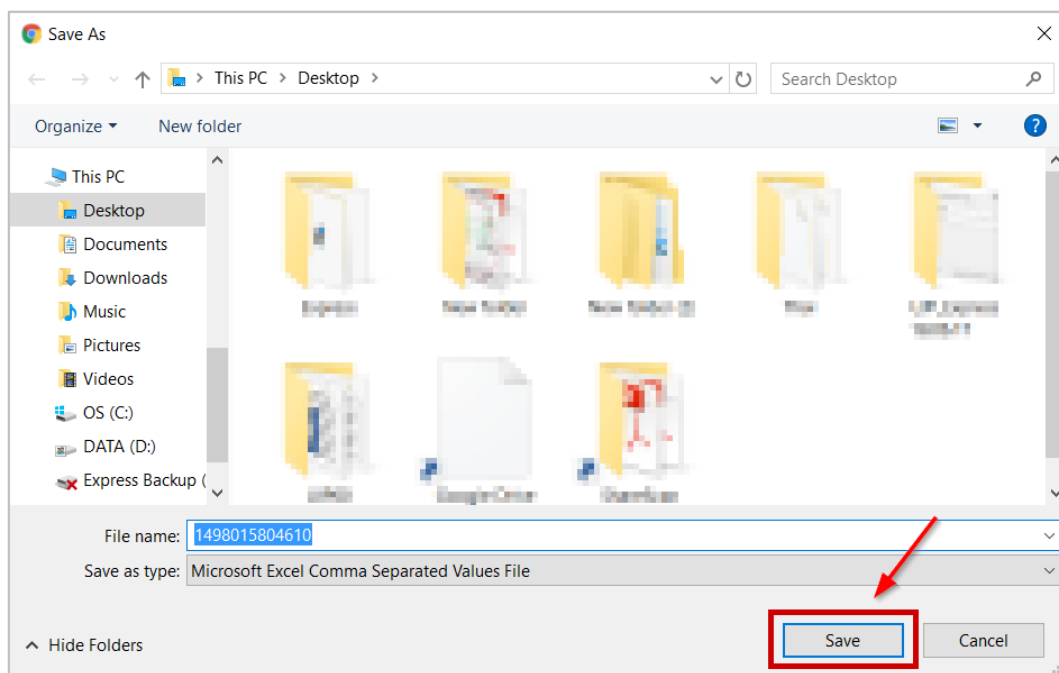

Figure 9: Export CSV file

3.1.4 History

Use for checking the data transferring history and the connection status of iThesis and IR. The results will be shown in Figure 11, and you can click on Download to save out the IR Bundle (complete thesis file with watermarks and metadata).
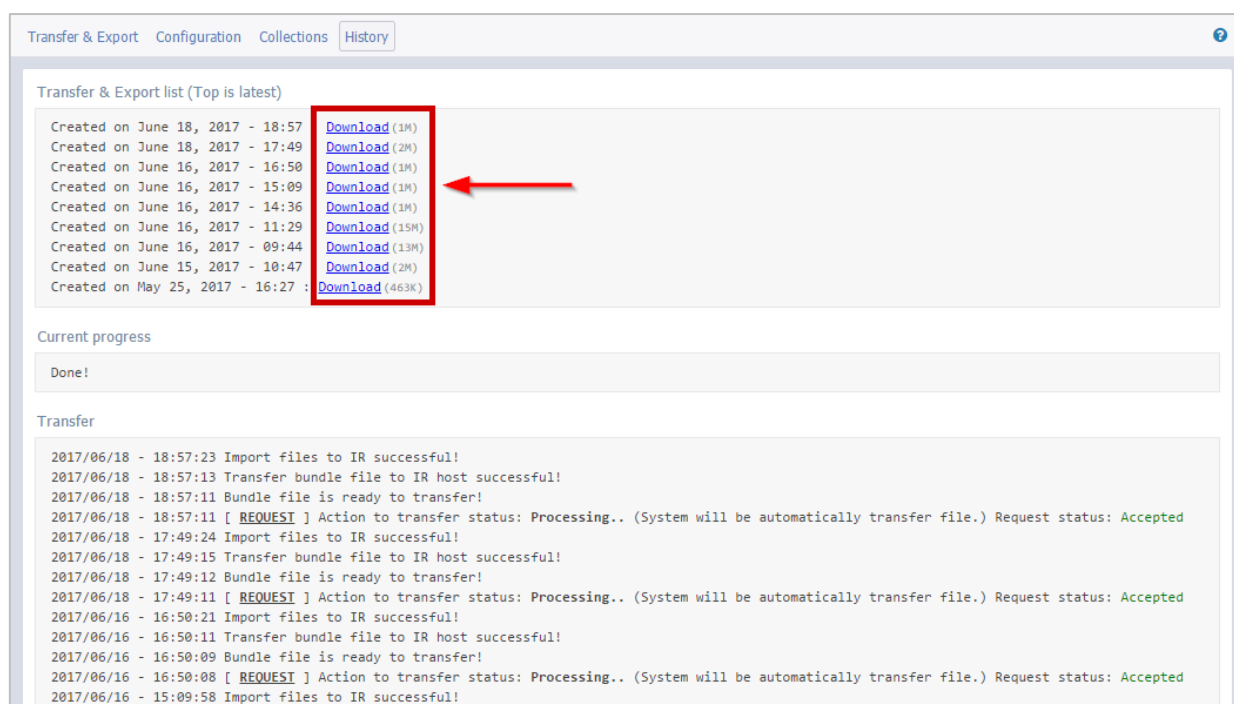
Figure: 10 Transferring History

3.2 Thai Digital Collection menu

The Thai Digital Collection is used for managing the complete theses that are ready-to-export to TDC (Thai Digital Collection) There are 3 submenus which are as follows;
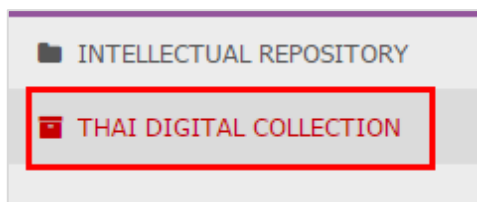

Figure 11: Thai Digital Collection menu

3.2.1 TDC-AS Collections

Use for checking the accuracy on matching between the collection ID number on IR and the collection ID number on the TDC warehouse. Librarian will not be able to add or edit the collection ID in this menu, in this section, IR staff will take the account to setting collection ID number instead. Regularly, there is an inspection between iThesis and OHEC system, if there is a change in pairs of communities/collections, the transmission will be disable. Figure 13

Figure 12: TDC-AS Collection

As shown in Figure 13, it is an example of TDC-AS Collections menu including of 3 main components which are as follows;

1. Faculty name – The name of the faculty that provides Master's and Doctoral degree program and using iThesis.
2. Collection ID – collection ID number on IR
3. Collection ID on TDC – collection ID number on TDC

3.2.2 File transfer

The File transfer menu will be used when the university want to transfer complete thesis files from IR to TDC, and the command can be ordered via iThesis. You can check student name, student ID, and file size before sending the files, as shown in Figure 14.
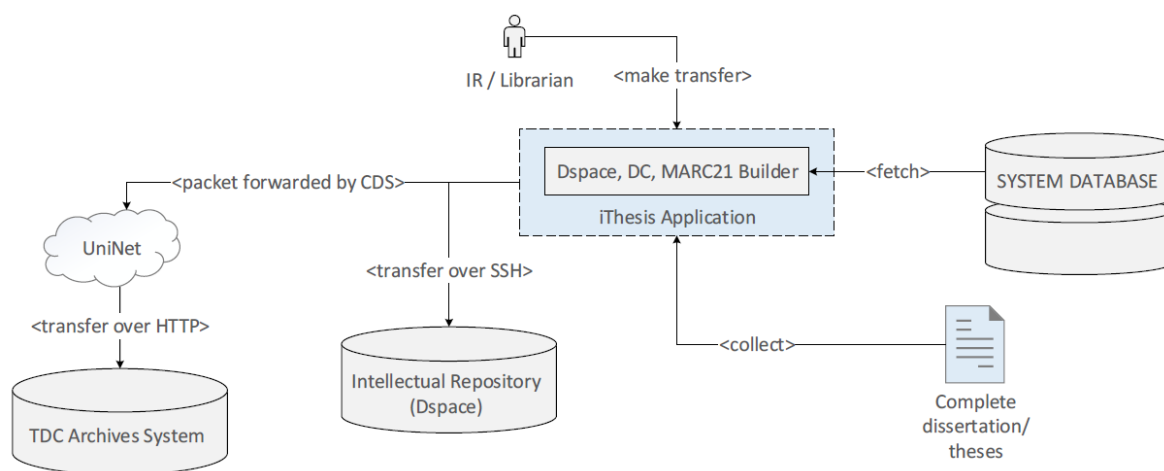
Figure 13: Workflow of transferring files to TDC

Transferring files to TDC can be done by these following steps;

1. Put check mark on files that you want to transfer, in Figure 15
2. Click ok, to confirm transferring files to TDC, in Figure 16

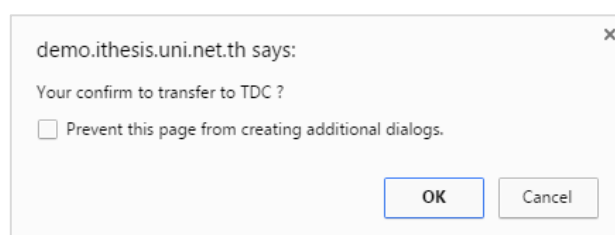Figure 14: The example files selection process

Figure 15: The example of pop-up confirmation box

During the transmission of the data to TDC, you can track the transferring status via web portal as the transmission will be automatically processing on queue and transfer rate in order to reduce the amount of workload on the UniNet network at the time of operation.

Figure 16: The example of transferring status on File transfer

The transferring status in Figure 16 and 17 can be explained as follows;

1. File Name is the date and time that the complete thesis was submitted to IR.
2. Status consists of 2 parts: the left is the status of sending data from IR to TDC as shown in Table 1, and the right is the receiving status of TDC as shown in Table 1.

Lists	Meaning
READY TO TRANSFER	The files are ready to transfer to TDC.
WAIT FOR TDC	Completing the request to transfer, and still waiting TDC's response or waiting for files downloading
Transferring... X%	On the process of transferring to TDC (auto update) – showing in percent of completion status
TRANSFERRED	TDC has well received the files (download & check sum file)
TDC REJECTED	TDC has rejected to receive the files for some reasons.
Please try again	Inconsistent data was found in the system, librarian can try transferring files to TDC again.

Table 1: Transferring status

Lists	Meaning
NOT AVAILABLE	There is no file ready to import, or the upload failed.
WAIT FOR TDC	The request to transfer files to TDC is complete, the files import is in progress.
IMPORTED	The files were imported to DSpace on TDC completely.

Table 2: Importing status

Moreover, you can see the list of student names, student IDs, file size, and can download the transferred TDC Bundle files (complete thesis files with watermarks and metadata) as shown in Figure 18.

Figure 17: Download of TDC Bundle

3.2.3 History log

The History log menu, in Figure 19, is used to see the history of the data transferred from IR to TDC. The showing information is separated into two main topics; (1) Request summary, and (2) Request detail, as shown in table 3.
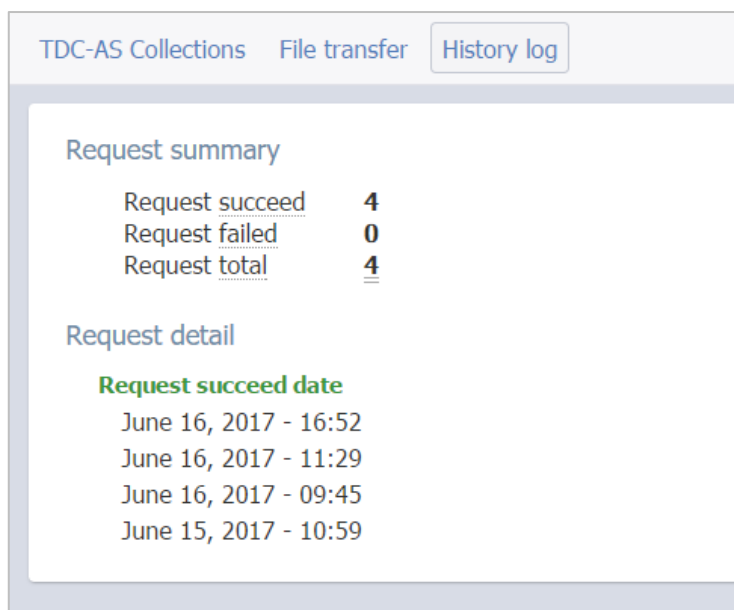
Figure 18: History log

Main topic	Sub topic	Meaning
Request summary	-	The status displays the requested results.
	Request succeed	Number of successful requests
	Request failed	Number of failed requests
	Request total	Number of total requests
Request detail	-	The details on date and time
	Request succeed date	Successful transmission history
	Request failed date	Fail transmission history

Table 3: Information displaying on History log

4. Open CSV file in MS Excel

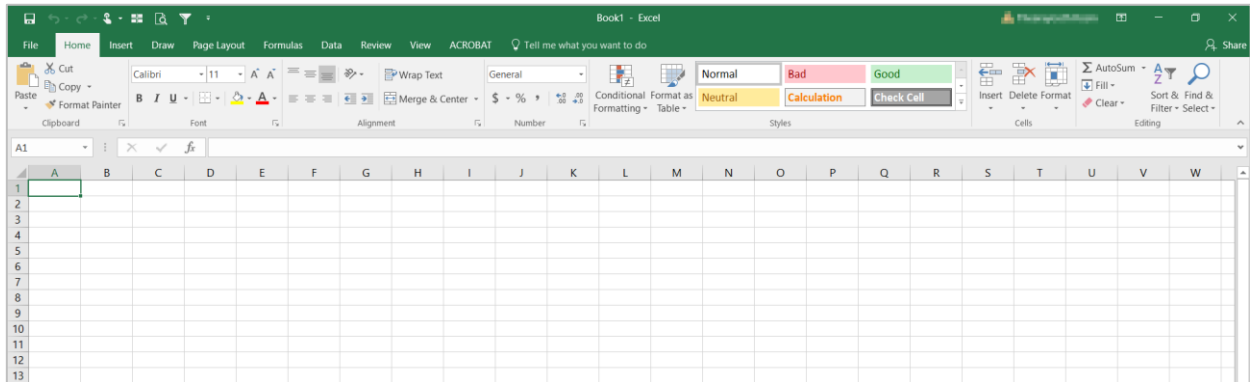1. Open Microsoft Excel program, as in Figure 20

Figure 19: Microsoft Excel program

2. Click on Data > From Text/CSV, as in Figure 21
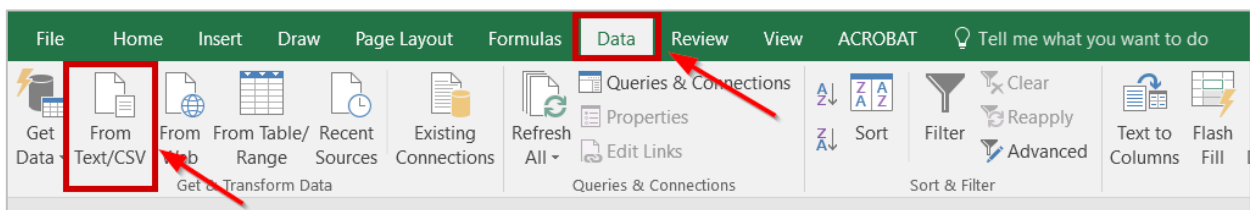

Figure 20: Data tools - From Text/CSV
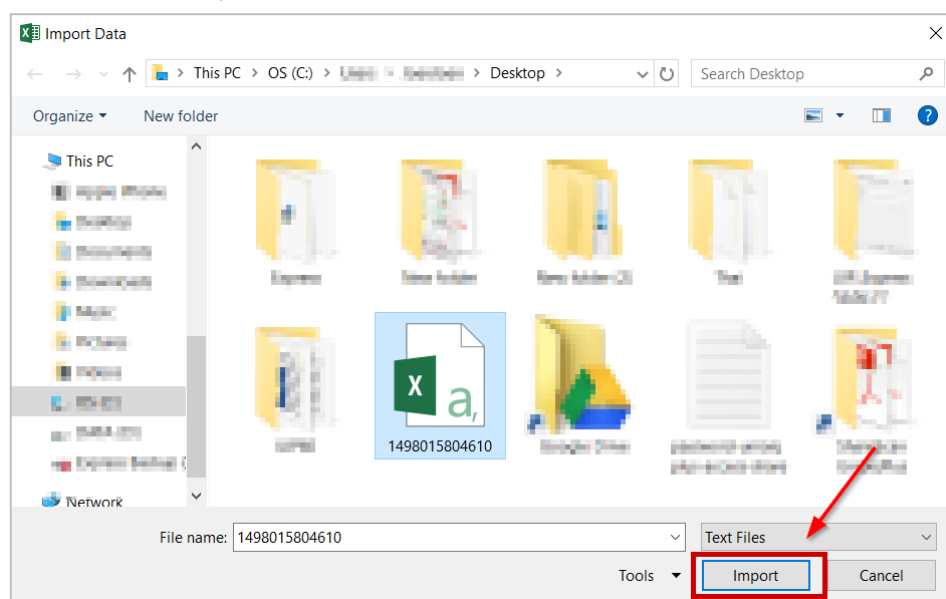
3. Select the CSV > Import, as in Figure 22

Figure 21: Selecting and opening a CSV file

4. You will finally get the data as in Figur 23. However, if the information you want to open is in Thai language, make sure that the File Origin is "65001: Unicode (UTF-8)". If not, adjust it to be "65001: Unicode (UTF-8)", so that, the program can read the file.

#	Faculty name	Collection ID
1	College of Management	123456789/50
2	Faculty of Psychology	123456789/67
3	Faculty of Dentistry	123456789/58
4	Faculty of Law	123456789/62
5	Faculty of Communication Arts	123456789/57
6	Faculty of Nursing	123456789/64
7	Faculty of Commerce and Accountancy	123456789/56
8	Faculty of Medicine	123456789/63
9	Faculty of Pharmaceutical Sciences	123456789/65
10	Faculty of Political Science	123456789/66
11	Faculty of Sports Science	123456789/69
12	Faculty of Engineering	123456789/60
13	Faculty of Fine and Applied Arts	123456789/61
14	Faculty of Economics	123456789/59
15	Faculty of Architecture	123456789/54
16	Faculty of Allied Health Sciences	123456789/53
17	Faculty of Veterinary Science	123456789/70
18	Faculty of Arts	123456789/55
19	Graduate School	123456789/71
20	College of Population Studies	123456789/51

Figure 22: Setting of File Origin for Thai version data

5. Click on Load, and you will get Excel file, as in Figure 24

#	Faculty name	Collection ID
1	College of Management	123456789/50
2	Faculty of Psychology	123456789/67
3	Faculty of Dentistry	123456789/58
4	Faculty of Law	123456789/62
5	Faculty of Communication Arts	123456789/57
6	Faculty of Nursing	123456789/64
7	Faculty of Commerce and Accountancy	123456789/56
8	Faculty of Medicine	123456789/63
9	Faculty of Pharmaceutical Sciences	123456789/65
10	Faculty of Political Science	123456789/66
11	Faculty of Sports Science	123456789/69
12	Faculty of Engineering	123456789/60
13	Faculty of Fine and Applied Arts	123456789/61
14	Faculty of Economics	123456789/59
15	Faculty of Architecture	123456789/54
16	Faculty of Allied Health Sciences	123456789/53
17	Faculty of Veterinary Science	123456789/70
18	Faculty of Arts	123456789/55
19	Graduate School	123456789/71
20	College of Population Studies	123456789/51
21	Petroleum and Petrochemical College	123456789/74
22	Faculty of Science	123456789/68
23	Language Institute	123456789/72
24	College of Public Health Sciences	123456789/52

Figure 23: CSV file opened by Microsoft Excel