VIREO

Thesis & Dissertation publishing

• Easy online submission for students
• Workflow for managing approvals and publishing to repository
• Flexible embargoes
• Student maintains copyright
• Local institutional control
Vireo Users Group

USETDA 2016 Conference Columbus, OH September 27, 2016

Stephanie Larrison, Texas State University
Ryan Steans, Texas Digital Library
Agenda

- About the organization
- History of Vireo
- Q & A
- Development status
- Screens of Vireo 3
Our Purpose

The Vireo Users Group (VUG)

• Gathers and prioritizes constituent needs to guide the development of the Vireo Electronic Thesis and Dissertation Management System

• Provides avenues for the exchange of information about Vireo needs and utilization
Organization

• User Group Members
• Steering Committee
• Vireo Developers Group

• Supported by the Texas Digital Library, stewards of the official source code for Vireo and coordinator of development and official version releases
Steering Committee

Co-Chairs

- **Stephanie Larrison**, Electronic Resources Librarian, Texas State University
- **Billie Peterson-Lugo**, Resources/Collection Management Librarian, Baylor University
Steering Committee

- Christopher Starcher, Digital Resources Librarian, Texas Tech University Libraries
- David Reynolds, Mgr. of Scholarly Digital Initiatives, Johns Hopkins University
- Ryan Steans, ex-officio, Director of Operations, Texas Digital Library
History of Vireo

- Texas Digital Library initiated the development of Vireo in 2005 - funding provided by Institute of Museum and Library Services.

- Texas A&M University have been the primary contributors since the beginning - first to deploy Vireo in the fall of 2008.

- Vireo Users Group founded in 2010 by Laura Hammons, Texas A&M University.

- In October 2012 Vireo 1.8 was released as Open Source software in github, where the code still resides today.
Vireo 2.0

• Released in February 2013

• Separation of Vireo from DSpace - an independent tool

• Improvements on usability and customization

• Early ProQuest integration began here with subject and embargo codes assigned in the background.
Vireo 3.0

• Released March 2015

• Complete ProQuest integration (license, embargo options, subject codes, and export file)

• Custom emails triggered by change of status

• ORCID integration

• Customizable columns and filters for use in working, reporting, and exporting

• Custom action checklist
Vireo Open Source
How about you?

- Anyone on Vireo 2?
- Are you using ORCID & ProQuest integration, email workflows?
- What IR do you export to? Challenges?
- What other exports do you use?
- Other questions or concerns?
Development Status

• Vireo 4 planned features
  - Customizable workflows
  - Controlled vocabularies
  - Align metadata with new standards

• Planning and development began in Fall 2015

• Where we are now
TDL ETD Metadata Working Group

- Kara Long (Baylor)
- Colleen Lyon (UT)
- Sarah Potvin (A&M), Chair
- Monica Rivero (Rice)
- Santi Thompson (UH)

Formed Summer 2014 with charge to provide guidance to TDL member institutions and other ETD practitioners on metadata for electronic theses and dissertations
TDL ETD Metadata Working Group

• “Descriptive Metadata Guidelines for Electronic Theses and Dissertations, Version 2”

• Adding descriptive metadata to ORCID field

• Update existing metadata to new standards

<table>
<thead>
<tr>
<th>Vireo Field</th>
<th>DSpace Metadata element</th>
</tr>
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<tbody>
<tr>
<td>Program</td>
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</tr>
<tr>
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<tr>
<td>Major</td>
<td>&lt;thesis.degree.major&gt;</td>
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</table>
Vireo Developers Group

- Texas A&M University (usually 2 from this group)
  James Creel, Doug Hahn, Jeremy Huff, Jason Savell, William Welling, and Rincy Matthew

- We need more help!!
Basic Workflow

  - Student Submission
Student Submission: 5-Step Process

1. Verify your personal information.
2. Agree to the license.
3. Enter information about your document.
4. Upload main document and supplementary files.
5. Confirm your information and complete the submission.
Verify Your Information

Please verify all of your personal information. Some of the information has been provided by your school; if this information is in error, you will need to correct it through the appropriate office at your school.

Required fields are indicated with an asterisk.

**Personal Information**

- **First Name:** Jane
- **Last Name:** Doe
- **Email:** jane.doe@school.edu
- **Year of Birth:**

**Affiliation**

- **School:** State University
- **College:** ...choose
- **Department:**

Your name should appear as it does on your title page. If your computer supports Unicode characters, you can use Unicode characters to fill in fields if your computer supports them.

Select the degree and major that are listed on your title page.

You must enter a permanent long-term address. If your present address is different, please use the Current Address field.
License Agreement

You must agree to the non-exclusive license below in order to continue:

I grant the Texas Digital Library (hereafter called "TDL"), my home institution (hereafter called "Institution"), and my academic department (hereafter called "Department") the non-exclusive rights to copy, display, perform, distribute and publish the content I submit to this repository (hereafter called "Work") and to make the Work available in any format in perpetuity as part of a TDL, Institution or Department repository communication or distribution effort.

I understand that once the Work is submitted, a bibliographic citation to the Work can remain visible in perpetuity, even if the Work is updated or removed.

I understand that the Work's copyright owner(s) will continue to own copyright outside these non-exclusive granted rights.

I warrant that:

1. I am the copyright owner of the Work, or
2. I am one of the copyright owners and have permission from the other owners to submit the Work, or
3. My Institution or Department is the copyright owner and I have permission to submit the Work, or
4. Another party is the copyright owner and I have permission to submit the Work.

Based on this, I further warrant to my knowledge:

1. The Work does not infringe any copyright, patent, or trade secrets of any third party,
2. The Work does not contain any libelous matter, nor invade the privacy of any person or third party, and
3. That no right in the Work has been sold, mortgaged, or otherwise disposed of, and is free from all claims.

I agree to hold TDL, Institution, Department, and their agents harmless for any liability arising from any breach of the above warranties or any claim of intellectual property infringement arising from the exercise of these non-exclusive granted rights.

☐ By checking here you agree to the above license in its entirety.

Agree and Continue>>>

ProQuest License can be included with institutional license or listed separately
Document Information

In this step you describe your thesis or dissertation. Please make sure that the information entered below matches the information contained in your document.

- Title:
- Degree Date: [choose] [choose]
- Document Type: [choose]
- Abstract:

For the degree date, enter the semester in which your degree will be conferred (typically your graduation semester).

You can use Unicode characters (like accents and diacritics) in these fields.

You can enter multiple keywords. Use semi-colons (;) to separate the entries.

Enter the names of each member of your committee, and use the checkboxes to indicate which one is the committee chair (check two if you have co-chairs).

Your Committee

- Document information
- Committee & chair information
- Release options (embargoes, publication to UMI)
Upload Your Files

In this step you will upload your thesis or dissertation to the server. Optionally, you may upload additional supplementary files that will be available along with your document after publication.

Upload your manuscript

* Manuscript in PDF:

Browse...  Upload

Upload supplementary files

Supplementary Files:

Browse...  Upload

Save and Continue >>

Student may upload supplementary files in addition to the main thesis or dissertation.

There is no restriction on file formats students can upload.

Your thesis or dissertation can only be one file, and the only allowable file format is PDF. Please contact your school for help or information related to creating a PDF file.

There is no limit on the number or formats of supplementary files you may upload.

SIZE QUOTA: no individual file may exceed 512 MB, and the total of all files must not exceed 4 GB.
Confirm & Submit

About You
- Name: User, Student
- Email: student1@tdl.org
- Phone: 555-555-5555
- Address: 123 Elm St. University, Texas 77777
  [edit your personal information]

Academic Affiliation
- School: Vireo Training Class
- Degree: Ph. D.
- Major: Biology
  [edit your personal information]

Document Information
- Title: Biology Dissertation Title
- Degree Date: May 2010
- Degree Type: Dissertation

Students may check all information and return to any previous step to make corrections using the bar at the top.
Staff side

- List View – Columns & Filters
- Submission View – and action options
- Corresponding with student and advisors
- Configurable Settings
- Email workflows
<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Assigned to</th>
<th>Title</th>
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<td>Brytnne Lowden</td>
<td>The Historical Consequences of Institutionalised Corruption in Modern Mexico</td>
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<tr>
<td>Lovas, Karina Marie 1988-</td>
<td>Published</td>
<td>Brytnne Lowden</td>
<td>Evolving international law and norms: International response to conflicts involving systematic sexual violence: A case study of Bosnia and Herzegovina, Rwanda, and the Democratic Republic of the Congo.</td>
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<td>Value, meaning and therapeutic notions of the Appalachian Trail</td>
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<td>Clark, Laura Elizabeth 1987-</td>
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<tr>
<td>Horn, Daniel 1985-</td>
<td>Pending Publication</td>
<td>Melissa Bland</td>
<td>Understanding the Role of Accessory Proteins on ENaC Function</td>
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<td>Lee, Esther 1984-</td>
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<td>Melissa Bland</td>
<td>The Effects of Accessory Proteins on ENaC Function</td>
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<td>Wun, Felicia Shannon 1988-</td>
<td>Pending Publication</td>
<td>Brytnne Lowden</td>
<td>Exploring the</td>
</tr>
</tbody>
</table>
Within an individual ETD record, an administrative user can see:

- the active, viewable ETD
- student and document metadata
- the status of the submission
- action log showing all actions taken on this record
- the custom action checklist showing actions that must be taken outside the Vireo system
There are numerous formatting revisions needed on your thesis. Please review our current Guide to Preparing and Submitting a Thesis or Dissertation on our website, or by clicking this link: http://www.gradcollege.txstate.edu/docs/Thesis_Diss_Guide.pdf.

An example of the front matter requirements and format can be found in Appendix B.
CONFIGURABLE SETTINGS

Customize the data that appears in various selectable options.

Available Embargo Types
Available Colleges
Available Programs
Available Departments
Available Administrative Groups
Available Majors
Available Degrees
Available Document Types
Available Committee Member Role Types
Available Graduation Months
Available Languages
Email Workflow

WORKFLOW OPTIONS

- Submitted
- Corrections Received
- Approved
- Pending Publication
- Published

EMAIL TEMPLATES

1. Thesis/Dissertation Revisions Required (*)
2. Thesis/Dissertation Approved (*)
3. SYSTEM Email Test
4. SYSTEM Verify Email Address
5. SYSTEM Initial Submission (*)
6. SYSTEM New User Registration
7. SYSTEM Advisor Review Request (*)
8. SYSTEM Advisor Review Request
9. SYSTEM Needs Corrections
10. SED Survey (*)
11. SYSTEM Deposit Notification
12. SYSTEM Initial Submission
13. Committee Approval Form (*)
14. Reformattign Needed (*)
15. Notice of reprint (*)
## Email workflow settings

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<td>Always</td>
<td>email SYSTEM Advisor Review Request (*)</td>
<td>Advisor</td>
</tr>
<tr>
<td>Always</td>
<td>email SYSTEM Initial Submission (*)</td>
<td>Student</td>
</tr>
<tr>
<td>Always</td>
<td>email SED Survey (*)</td>
<td>Administrative Group (Library)</td>
</tr>
<tr>
<td>if Department = Mathematics</td>
<td>then email Notice of receipt (*)</td>
<td>Department</td>
</tr>
</tbody>
</table>

[ADD NEW]
Questions / Comments

VUG Website
http://vireoetd.org/vireo/