VIREO

4.0 TRAINING
UNITED STATES ELECTRONIC THESIS AND DISSERTATION ASSOCIATION ANNUAL CONFERENCE
CHARLESTON, SOUTH CAROLINA

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Origins of Vireo

Organizations & Categories

Workflow Steps

Field Profiles

Controlled vocabularies

Putting it all together
What is Vireo?

Vireo is:
- a workflow tool to move theses, dissertations, and other scholarly works required for completing a degree from student, to reviewers, to a repository

Vireo is not:
- an editing suite
- a repository. It is not for permanent storage
Origins of Vireo

Created by the Texas Digital Library with support from an IMLS grant from 2007-2010

Built to be open source software

First version was released in 2010, Vireo 2 released in 2013, Vireo 3 released in 2015
Vireo Development

TDL leads Vireo development

Development is supported by:

- Texas A&M and Texas Tech developers
- The greater Vireo Community
- The Vireo User Group Steering Committee

Frank Smutniak, TDL Senior Software Engineer and Lead Vireo Developer
Vireo Users Group

You are part of it!

VUG discussion list – To join, go to https://utlists.utexas.edu/sympa/info/tdl-vireo

Any Vireo user can ask a question or share a success!
Contribute

Vireo is better when we all work together!

Offer the developers your feedback
- On the discussion list: https://utlists.utexas.edu/sympa/info/tdl-vireo
- On Slack - Just ask us via the list to add you to the channel
- Via Github: https://github.com/TexasDigitalLibrary/Vireo

Participate in a Vireo Community Sprint
- The next community sprint will be announced via the discussion list.
- TDL needs technical contributions, documentation creators and editors, and end-user testers during these sprints.
USERS GROUP MEETING

THURSDAY 4PM, THIS ROOM
Selection screen for student submission of ETD

- Category: College
- Organization: Stephanie's College
Organization categories are created by you

Default categories in Vireo 4 can be edited, deleted, created.

College
Degree
Degree Level
Department

Program
Administrative Group
University
Submission Type
Tips to select categories

- Consider any departments, colleges, degrees, that may have 'exceptions' to the rule.
- Are there any problem areas in the current workflow?
- What information is required for only certain types of ETDs?
- Categories should be easy for students to understand so they know which workflow is applicable to them.

Best Practices Creating Workflows

- Use at least one top level Organization to create a "template" of basic fields and settings applicable to all submissions.
- Think about what is needed for the end product, not a person's personal preference or workflow.
- Keep workflows as uniform as possible and use multiple organization categories sparingly and only where necessary.
Hands On Exercise – Parent Organization (aka workflow)

- Go to “Settings” > “Organization”
- In the “Create Organization” box
  - Type a name for your personal College (i.e. College of Stephanie or Stephanie's College).
  - Choose “College” in the drop-down menu under “Category”
  - Click “Add to Institution”
- Click on your new College when it appears in the new box with title College.
- In the bottom, click on “Manage Organization”. Change “Organization accepts Submissions” to No.
Hands On Exercise – Child Organizations (aka workflows)

- Click on your newly created Parent organization in the box with title College.
- Go to “Create Organization” and choose a different category in the drop-down menu under “Category” (i.e. Submission Type).
- Create a name for your workflow under “Name” (i.e. Dissertations).
- Confirm that the Add to button at the bottom of the box reads “Add to {name of your parent organization}.”
- Repeat the process to create another child organization in the SAME category.
WORKFLOW STEPS

The order of tabs and fields of submission forms
Workflow tips

• Click on the names of the Workflow steps to open them. The arrows on the right are to move the steps.

• Never delete a workflow step. It is better to edit and hide what you don’t need.

• Never delete a field (i.e. drag it to the trash can). Disable or edit it instead.

• Do not mark a Workflow step as not overridable, use this setting at the field profile level instead.

IF YOU DELETE A WORKFLOW STEP OR FIELD – YOU WILL HAVE TO SYNC THE ENTIRE WORKFLOW WITH THE PARENT.
Managing workflows

**Default Workflow Steps**
- Personal Information
- License Agreement
- Document Information
- File Upload

**Benefit of Hierarchies**
- Child organizations inherit settings from the parent
- Ensures consistency of workflows
- Makes updating easier
FIELD PROFILES

A field and its settings
Field profile tabs

• General
• Advanced
• Controlled Vocabulary (applicable only with specific Input Types)
<table>
<thead>
<tr>
<th>Label</th>
<th>General Options</th>
<th>Advanced Options</th>
<th>Controlled Vocabulary Options</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Repeateable: Yes</td>
<td></td>
<td>Flagged: Yes</td>
</tr>
<tr>
<td></td>
<td>Required: Yes</td>
<td></td>
<td>Logged: Yes</td>
</tr>
<tr>
<td></td>
<td>Disabled: Yes</td>
<td></td>
<td>Overridable: Yes</td>
</tr>
<tr>
<td></td>
<td>Hidden: Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Label: Committee Chair
Metadata Key

dc.contributor.advisor

Input Type

INPUT_CONTACT_SELECT

Help

Select the name and email address for your committee chair.

Default Value

A default value for the new field

Shibboleth Attribute Mapping

Select a Shibboleth Attribute
Controlled Vocabulary

Committee Members
Hands On Exercise – Editing Workflow Steps and Field Profiles

- Click on your parent organization in the box with title College.
- Click on “Manage Workflow” in the bottom of the screen and open a workflow step.
- Choose a field profile that is required (*) and change “Required” to No.
- Choose another field profile and change “Disabled” to Yes.
- Click on the name of one of your child workflows, then click on “Manage Workflow”.
- Open the same Workflow Step and field profiles edited in the parent workflow.
- Confirm that changes made in parent are visible in child workflow.
- Click on the name of your other child workflow and choose any field profile to edit by changing whether it is required or not, or whether it is disabled or not.
- Confirm that changes were NOT made to the other child or to the parent.
QUICK REVIEW & QUESTIONS

**Organizations** - how submission forms (workflows) are organized

“Hierarchical Organization Management” turned ON:
• Changes in Parent are inherited by Child organizations
• Parent levels should not accept submissions

“Hierarchical Organization Management” turned OFF:
• Every workflow is independent

**Workflow Steps** - order of tabs and fields of submission forms

• Never trash a field
• Never delete a workflow step

**Field Profiles** – settings for each field

• General, Advanced, and Controlled Vocabulary tabs
• Never change the Metadata keys or Shibboleth attribute mapping
CONTROLLED VOCABULARIES

Lists of Colleges, Departments, Majors, Committee Members, etc.
3 Sections in Controlled Vocabularies

• **Add Controlled Vocabulary:** This area is for making a NAME for a new vocabulary or changing the name of an existing one.

• **Upload Controlled Vocabularies:** This area is for uploading new or changed vocabularies. It is also for downloading existing vocabularies. The names with a globe icon are configurable in the Application Settings.
  
  • *Tip:* Instead of making a new csv or txt file for upload, export csv an existing vocabulary and use it for template of new ones.

• **On screen editor for controlled vocabularies:** This area is used for making changes on screen rather than downloading and editing.
Hands On Exercise – Create a Controlled Vocabulary

• Click on "Add Controlled Vocabulary" to create a new name for your CV.
• Click on "Upload Controlled Vocabularies" and select the name of your new CV under "Upload to."
• Export the CSV file and add values under the "name" header. Add email addresses as applicable under the "contacts" header. Save the file and return to Vireo.
• In "Upload Controlled Vocabularies" select the name you created under "Upload to" then browse to find the new CSV file.
• A preview of the changes to the file should be displayed after clicking Upload.
• Edit the new CV in the on-screen editor by:
  o adding more values using the plus sign
  o removing values with the trash can icon
  o edit existing values with the pencil icon
Important Input-Types to use with Controlled Vocabularies (CV)

• **INPUT_CONTACT**: Used with a Controlled Vocabulary with the “contact” column populated by email addresses. This input type will allow selection from an associated CV, as well as entering new or unique values. The new contact will NOT be added to the CV. A field for a name and email address will be provided. By default, the “Non-Chairing Committee Members” have this input type selected.

• **INPUT_CONTACT_SELECT**: Used with a CV with the “contact” column populated by email addresses. This input type will restrict the value selection to the CV list. By default, the Committee Chair has this input type selected.

• **INPUT_TEXT**: Can be used with or without a CV. If there is no CV associated with the field, it is a free text field. If there is an assigned CV, values from the vocabulary will be auto-suggested as words are typed into the field. The user can choose a value from the list or enter a different value. The new value will NOT be added to the CV.

• **INPUT_SELECT**: Used with a CV. The user will only be able to choose from the values in the associated vocabulary.
CREATING UNIQUE WORKFLOWS

Putting it all together
Hands On Exercise – Add a controlled vocabulary to a Field

• Go to “Settings” > “Organization” > and select an Organization
• Click on “Manage Workflow” and confirm that the bar just under it reads "Manage your selected organization Workflow."
• Open the workflow step that has a CV you would like to change.
• Open the applicable Field Profile and click on the last tab, “Controlled Vocabulary”.
• Select your new vocabulary from the drop-down menu and click “Update”.
• Click on the “Advanced” tab in the field profile. Refer to the Input Type definitions if changes are needed.
Hands On Exercise – Customize Workflows

- Start at parent organization
  - Add a Controlled Vocabulary to a field
  - Edit a field label
  - Make a field optional
  - Disable a field you don’t need (Do not trash)
  - Flag a field so that it is visible in the submission View
  - Log a field so that it is included in the action logs
  - Prepopulate fields to match custom workflow. i.e. if the workflow is based on “Submission Type” open this field profile and add a “Default Value” in the “Advanced” tab such as “Dissertation” for a PhD workflow, or Masters Thesis for a Masters workflow.
  - Disable 2 fields on 1 child organization
Hands On Exercise – Test Customized Workflows

◦ Choose “Submission History” from the menu under your account name.
◦ Click on “New Submission”
◦ Find and click on the college name you created
◦ Choose a workflow to begin
◦ After submission, check for email acknowledgement to Submitter, and email sent to Chair/Advisor
◦ Test other workflows
◦ In staff view, select your submissions in List view and check
OVERVIEW
QUESTIONS?

Email Stephanie at Larrison@txstate.edu
Shared resources

Vireo User Group wiki:
https://texasdigitallibrary.atlassian.net/wiki/spaces/VUG/

Vireo User Group website:
https://vireoetd.org/

Github (for developers and the technically inclined):
https://github.com/TexasDigitalLibrary/Vireo

Discussion List:
https://utlists.utexas.edu/sympa/info/tdl-vireo