

VIREO



**4.0
TRAINING**

YA'LL READY FOR THIS?



TEXAS CONFERENCE ON DIGITAL LIBRARIES AUSTIN, TX MAY 21, 2019

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You will learn the core differences between Vireo 3 and 4, which are

Understanding that the Organizational structure is the basis of customized workflows

Understanding the use of field profiles for customization of workflows

Understanding the creation and application of controlled vocabularies

Outcomes for
today's
training

Organizations

Workflow Steps

Field Profiles

BREAK

Controlled vocabularies

Putting it all together

agenda

ORGANIZATIONS

How submission forms (workflows) are organized

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 organization 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 for Organizations and Workflows

- Use at least **one** top level Organization Category 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.

What would you choose if

- an Institution has decentralized ETD submissions. Each College processes their own dissertations/theses and each has slightly different criteria.

College

- an Institution has centralized ETD processing and accepts PhDs, masters, and undergraduate honors theses - all colleges and departments submit the same kind of info.

Degree Level, Submission Type

- an Institution accepts only masters theses, but they have a deal with Creative Writing to not post them in the repository, which could mean they do not agree to a license or have a separate license.

Restricted, License Type, Degree, Department

Hands On Exercise – Parent Organization

- 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

- 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)

General

Advanced

Controlled Vocabulary

Label

Committee Chair

Repeatable:

Yes No

Flagged:

Yes No

Required:

Yes No

Logged:

Yes No

Disabled:

Yes No

Overridable:

Yes No

Hidden:

Yes No

General

Advanced

Controlled Vocabulary

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



General

Advanced

Controlled Vocabulary

Controlled Vocabulary

Committee Members



Clear

Hands On Exercise – Editing Workflows

- 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.



BREAK

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.

Important Input-Types to use with Controlled Vocabularies (CV)

- **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.
- **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.

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:
 - adding more values using the plus sign
 - removing values with the trash can icon
 - edit existing values with the pencil icon

Hands On Exercise – Add a CV to a Field Profile

- Go “Settings” > “Organization” > and select an organization.
 - *Remember: If you want a change to apply to all child workflows, make the change at the parent level.*
- 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.

CREATING UNIQUE WORKFLOWS

Putting it all
together

Make any additional customizations in the workflows that you may actually use & test them

Example customizations

- Editing a field label
- Making a field optional
- Disabling a field you don't need (Do not trash)
- Flagging a field so that it is visible in the submission View
- Logging 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.

REMEMBER: If the customization should apply to both child organizations, make the change at the parent level.

Testing custom 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

For this workshop the default email workflows are turned on for the student and committee chair/advisor to receive acknowledgement that submission was received.

Depositing into a test IR is not set up



OVERVIEW



QUESTIONS?

Email Stephanie at Larrison@txstate.edu