

Training Notes for Vireo 3 - 02/27/2015

Student View

Submission Status

Start a new Submission will launch a warning if the student already has a submission in place.

Student can

- continue on a submission

- edit a submission

- Start a New Submission anyway

Verify Your Information

ORCID ID now available. ORCID ID must be a valid ID and in the correct format

Some files will blank out, such as Major – if student already has a similar degree in place

- College: Information Studies

- Program: Communications

- Department: Library Science

- Degree: Masters

- Major: blanks out some

License Agreement

If ProQuest UMI is not available or selected, you will NOT see ProQuest Embargo options on the next screen. Seeing the ProQuest Embargo options is dependent on the selection of the ProQuest UMI license.

Document Information

Default Embargoes vs. ProQuest Embargoes

Default Embargoes are the same embargoes we've been collecting

ProQuest Embargoes are the embargoes we specifically tag for export to ProQuest so their system will embargo the files automatically for the time indicated

We had many students wishing to have separate embargoes for different purposes, this should enable students to make their data available in ProQuest prior to Open Access

Submittal complete

A student can always go and see what is going on with their ETD at "Submission History"

Submission Status (again)

Click "View" to see state of ETD

View Application

Viewable Action Checklist – a student can now see "public" items from the Custom Action Checklist

Current Submission State – will be displayed in a floating window

Needs Corrections

Floating “Needs Corrections” screen will provide direction to students

Committee Member View

Review Application

Committee Member “approval” sent to Action Log

Committee Member rejection now requires a comment explaining why – which will show in the Action Log

An “Approval” can now be “unapproved” if the faculty member is suddenly feeling fickle

View Tab

Personal Info Sub-Tab

ORCID ID – must validate and be correct format

Document Info Sub-Tab

Embargoes

Will display which embargo is for ProQuest

Can replace embargo from drop-down and will replace in proper area: default or Proquest embargo

Degree Info Sub-Tab

Deleting something such as “Department” will leave an open field, but if the user begins typing, options will appear to assist them

Active Document Area

Upload New File – can now use as email feature

If you set to “Needs Correction” but do not include an email, you will receive an error message

Add Comment/ Email Area

Adding Email Recipients

As either main recipient or CC recipient, user can choose type of email rather than specific email address or person. Example “Student” or “Advisor” or “College”. But can type in email address directly.

Email addresses of recipients will show up in the Action Log with the message

More... option

View entire action log for an individual file by clicking on “[more...]”

View Multiple ETDs at the Same Time

Users may now work in multiple screens at the same time and work on different ETDs in each

Settings

Application Settings

Submission Availability

Allow Multiple Submissions – enables functionality we saw when we wanted to submit a new document, system now asks student if they'd like to continue a prior item or submit a new document

ORCID settings

Validate ORCID ID – Validate with the ORCID API

Authenticate ORCID ID – against the ORCID ID system (not at TDL) compare with student's first and last name

Custom Action Checklist

[Add New] – can now make items visible to the student or only visible in the Admin screens

Email Settings

Creating a workflow email rule

- Under each "State", users can create an email rule
- Based on "If Then" Statements.
- All rules can be turned on and off, including global rules
- Rules created by an administrator can be edited or thrown away
- All rules must be "turned on" after they are created. To turn an item "on", please click the triangle indicating "play".
- To turn off a rule, click the "Pause" icon, two vertical parallel bars.

Step 1:

Consider the State of the ETD.

Submitted

Corrections Received

Approved

Pending Publication

Published

At which of these states should the action you are considering take place? If you would like to email the student and faculty advisor at the time of an ETD's submission, you would select "Submitted".

Step 2:

To create a rule, create the starting Condition –

- Always
- By College
- By Department
- By Program

Always: If the action “Always” occurs, such as *Any time a Thesis or Dissertation is submitted, the system “Always” sends an email to the student*, then use “Always”.

College: if the email is sent only if a student belongs to a particular “College”, then select “College”.

Department: if the email is sent only if a student belongs to a particular “Department”, then select “Department”.

Program: if the email is sent only if a student belongs to a particular “Program”, then select “Program”.

Set the appropriate College, Department or Program by name. The system will select these from the Colleges, Departments and Programs created in **Configurable Settings**.

Example –

The College of Information Studies requires that the student’s Advisor is alerted when the student submits an ETD, you can set a special rule.

When an ETD is submitted, if the “College” is “Information Studies” then email “System Advisor Review Request” to the recipient “Advisor” (in Vireo, “Advisor” email is determined by the student during the ETD submission process)

You may apply multiple rules in this area. The submission of an ETD can “Always” result in sending an email to a student. If the student is in the “College” of “Engineering” you may email an administrative associate at the “College”. The “Department” of “Electrical Engineering” may wish to alert the “Advisor” that student has submitted an ETD. And, at “Program” manager may wish to alert an administrative team within the program that the ETD has been submitted.

A recipient, including an “Administrative Sub-Group” must be defined in **Configurable Settings**. Users cannot add email addresses in the Email Settings Workflow Options

Step 3: Select a Template

You may need to create templates for specific Colleges, Departments and Programs. As before, templates are created at the bottom of the **Email Settings tab**. Once this is done, you may choose the correct template for the email to be sent.

Example – Whenever a student submits corrections to their ETD, the system switches from “Needs Corrections” to “Corrections Received”. The “Assignee” working on this project will wish to know that the Corrections have been received.

When Corrections are received “Always” email “Corrections Received Template” to “Assignee”.

Step 4: Select a Recipient

Who will receive these emails?

- Administrative Group
- Advisor
- Assignee
- College
- Department
- Program
- Student

Administrative Group – These groups are created in the new area in **Configurable Settings**. This allows users to create special groups that do not fit into the other pre-defined areas. Example: Cataloging Librarians may wish to receive an email when an item is set to “Pending Publication”.

Advisor – Upon creation of their ETD submission, a student enters in a Chair person’s name and email. This email address will be used for correspondence sent to the Advisor.

Assignee – This recipient is the person who is currently associated with the ETD as a Vireo administrator. If the thesis reviewer is assigned to a specific thesis, emails will come to this person.

College – This Group is managed in the **Configurable Settings**. All email addresses associated with a College will receive emails sent to this recipient.

Department – This Group is managed in the **Configurable Settings**. All email addresses associated with a Department will receive emails sent to this recipient.

Program – This Group is managed in the **Configurable Settings**. All email addresses associated with a Program will receive emails sent to this recipient.

Use Examples –

When an item is set to “Published” as the Status, your Thesis Office may want to receive notice that the Library has “Published” the ETD to the repository.

If an item is set to **Published** “Always” (no need for college list, etc...) email “Corrections Received email template” to “Administrative Group” “Thesis Office”

When an item is set to “Pending Publication”, you may wish to alert an administrative group of Librarians that the item is now ready for their review.

If an item is set to **Pending Publication** “Always” email the template “Librarian Head’s Up” to “Administrative Group (Librarians)”.

You can imagine other uses. For example -

If an ETD is Submitted and if that item is from the “College” of “Information Studies” then email “SYSTEM Initial Submission” to “College” recipients as defined in **Configurable Settings**.

If an ETD is Submitted and if that item is from the “Department” of “Botany”, then email “SYSTEM Initial Submission” to the “Advisor” as defined by the email set for their advisor by the student.

Other Email Improvements:

New template variable for a URL to take a student directly to their submission

Configurable Settings

Available Embargo Types

There are now two types of Embargo categories – Default and ProQuest

Default reflects the prior use of embargoes at TDL. These embargoes are used only for Vireo administrators and are for internal reference only.

ProQuest Embargoes send metadata to ProQuest alerting ProQuest/ UMI as to the embargo the student has opted for with their organization.

Example – a student wishes to delay Open Access of their ETD via Vireo to the their University repository, but they wish to make the material available to fellow research students as soon as possible. They may select a 2 year **Default** Embargo but none for the **ProQuest** Embargo.

There are global embargoes loaded with the system. As of this time, the ProQuest Embargoes reflect the same embargoes available to students via ProQuest’s ezuploader.

Available Colleges, Departments, Programs

Users may now add email addresses to associate with specific Colleges, Departments and Programs. For how this will work, please consult the Email Settings section.

Available Administrative Groups

In order to better manage email options under Email Settings, users may create Administrative Groups. The groups will appear only in the Email Settings tab. These are basically email list serves intended for flexibility in designing your email workflow.

List Tab

Filter Options Area

Manage Filters

Save current filter

As always, a user may assign a Filter Name to a saved filter. They may also make the filter public for use by anyone else using their same installation of Vireo.

However, users may now also save the columns they are currently display as well as the rows. Columns are still managed in the “Customize View” area above the list of ETDs. Saving both columns and rows may be useful for generating reports with specific data or retaining a specific view the user finds useful.

Filter by Checklist Items: Users can filter the list by selecting a Custom Action from the list

Advanced Features Area

Batch Operations

Download Export

Batch Export as Reporting Tool: Selecting “Excel Export” will provide users with a secondary dropdown menu. From here, they can select a “Saved Filter”, including filters that have saved both rows and columns in order to produce an Excel report.

Batch Comment/ Email: Once a filter is applied, a user may send an email to everyone displayed in the List view. Example – Send a batch email to everyone who has an embargo that is about to expire and ask if they want an extension

Download Action Log in Export Package: Downloading the Excel Package Export will enable users to get a complete record of all filtered items, including the Action Log

Export Improvements

Committee Members now separated by a comma

Shows all items from Action Checklist, including which items are checked

Semi-colon between the Default and ProQuest Embargo

ORCID ID as exported field