What's new in Vireo 4.0?

About today's event:
Stephanie Larrison, product owner of Vireo 4 development will demonstrate the new features of Vireo 4, now available on GitHub.

Event details:
August 20, 2019 1:30PM CDT
Optional dial-in from the US: 408.317.9253
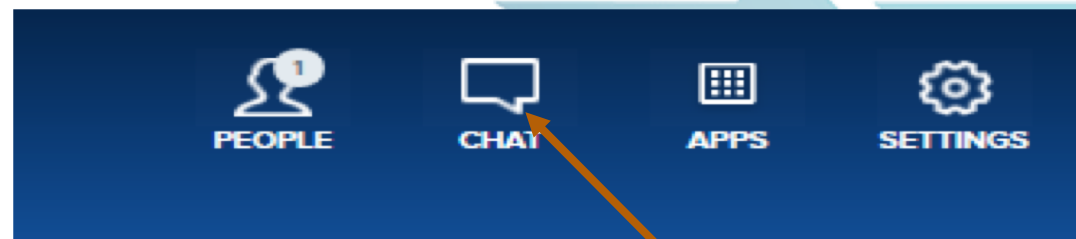Global dial-in numbers are at https://www.bluejeans.com/numbers

This BlueJeans webinar will be recorded.
It is not necessary to activate your video camera

Using Bluejeans

PEOPLE CHAT APPS SETTINGS

Chat
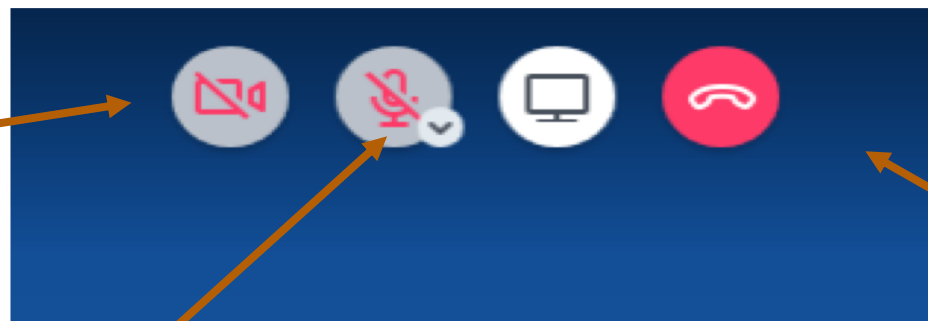
Web cam on/off

Microphone on/off and "switch to phone audio"

Hang up / leave meeting

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What's new in Vireo 4.0?

Speakers

Stephanie Larrison

Electronic Resources Librarian at Texas State University, co-chair of the Vireo User Group Steering Committee and product owner for Vireo 4.

Christopher Starcher

Digital Systems Librarian for the Texas Tech University Libraries, member of the Vireo User Group Steering Committee and contributor to Vireo 4 development.

What to expect

- In depth overview of specific end user features

- No discussion about code or technical issues

- Target audience is Vireo Administrators, who set up and manage the system at their institution

- Out of the box features and functionality of Vireo 4

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Agenda

About Vireo

Organizations and Categories

Customizable submission workflows

Enhanced field control for filtering, flagging, and tracking

Improved metadata

Controlled vocabularies

Audience Q & A

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About

History

- IMLS Grant

- Vireo Users Group

- Development

Why Vireo 4

- Aging, unsupported codebase

- User experience enhancements

- Added functionality

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Organizations & Categories

Multiple Workflows

Creating Organizations = Creating a workflow (submission form)

Institution is a preset Organization which contains all of the workflow default settings. It should **NEVER** be used to accept submissions and rarely be edited.

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Organization tab

Create Organization [-]

NAME

Name of the new organizati

CATEGORY

Application   Workflow Management   Organization

ORGANIZATIONS AND WORKFLOWS

Institution ↓ ←

Organization tab – Default workflow steps

⚙ MANAGE ORGANIZATION   📋 MANAGE WORKFLOW   ✉ EMAIL WORKFLOW RULES

Manage Institution Workflow

Add Workflow Step   ℹ

1. PERSONAL INFORMATION

2. LICENSE AGREEMENT

3. DOCUMENT INFORMATION

4. FILE UPLOAD

Institution should NEVER accept submissions

Creating workflows

Creating Organizations = Creating a workflow (submission form)

Organization Categories

o   Simply labels to help organize multiple submission forms

o   Default labels are suggestions, you may create your own

o   Go to Settings > Application > Organization Settings to modify Organization Categories.

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How do I choose?

Category : Submission Type
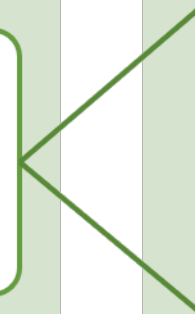
For an institution with a submission form for Master's and a separate submission form for PhD students.

Category : College and Degree Level

For an institution with ETD processing managed by each College, with some Colleges needing separate submission forms for degree level.

Create Organization [-]

NAME

College of Health

CATEGORY

College ▼

Add to Institution

Create Organization [-]

NAME

Master's

CATEGORY

Degree Level ▼

Add to College of Health

ORGANIZATIONS AND WORKFLOWS

Institution ↓

Degree / College / Department / Degree Level

College of Arts & Sciences 2 *College*	⚙	▤	✉
College of Health 1 *College*	⚙	▤	✉

Degree Level

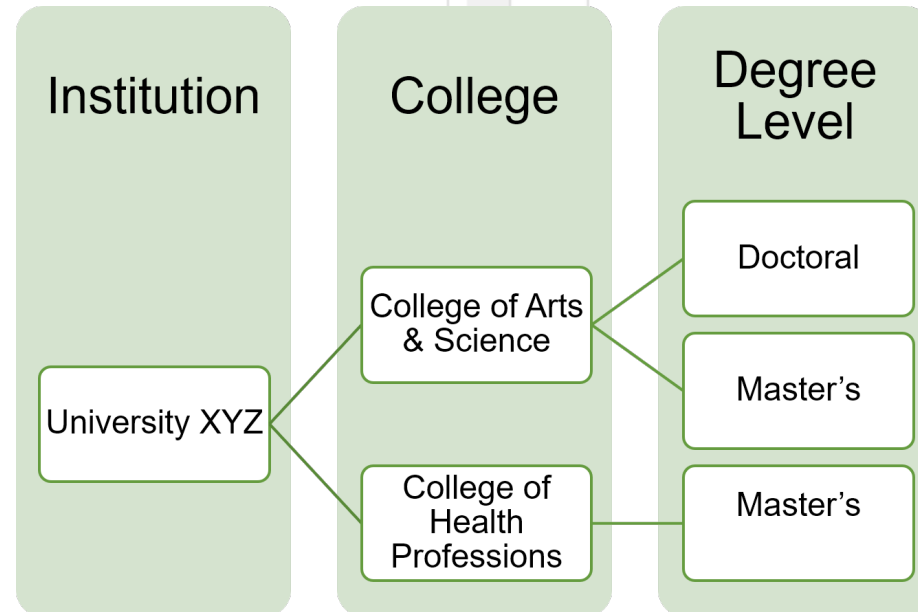|			
Doctoral	⚙	▤	✉
Master's	⚙	▤	✉

ORGANIZATIONS AND WORKFLOWS

Institution ⬇

Degree / College / Department / Degree Level

College of Arts & Sciences 2 ⚙ 🗒 ✉
College

College of Health 1 ⚙ 🗒 ✉
College

Degree Level

Doctoral ⚙ 🗒 ✉

Master's ⚙ 🗒 ✉

Institution	College	Degree Level
University XYZ	College of Arts & Science	Doctoral
		Master's
	College of Health Professions	Master's

Begin by choosing your College

Institution ↓

College of Arts & Sciences (2) ← The number indicates there are more options to choose
College

College of Health (1)
College

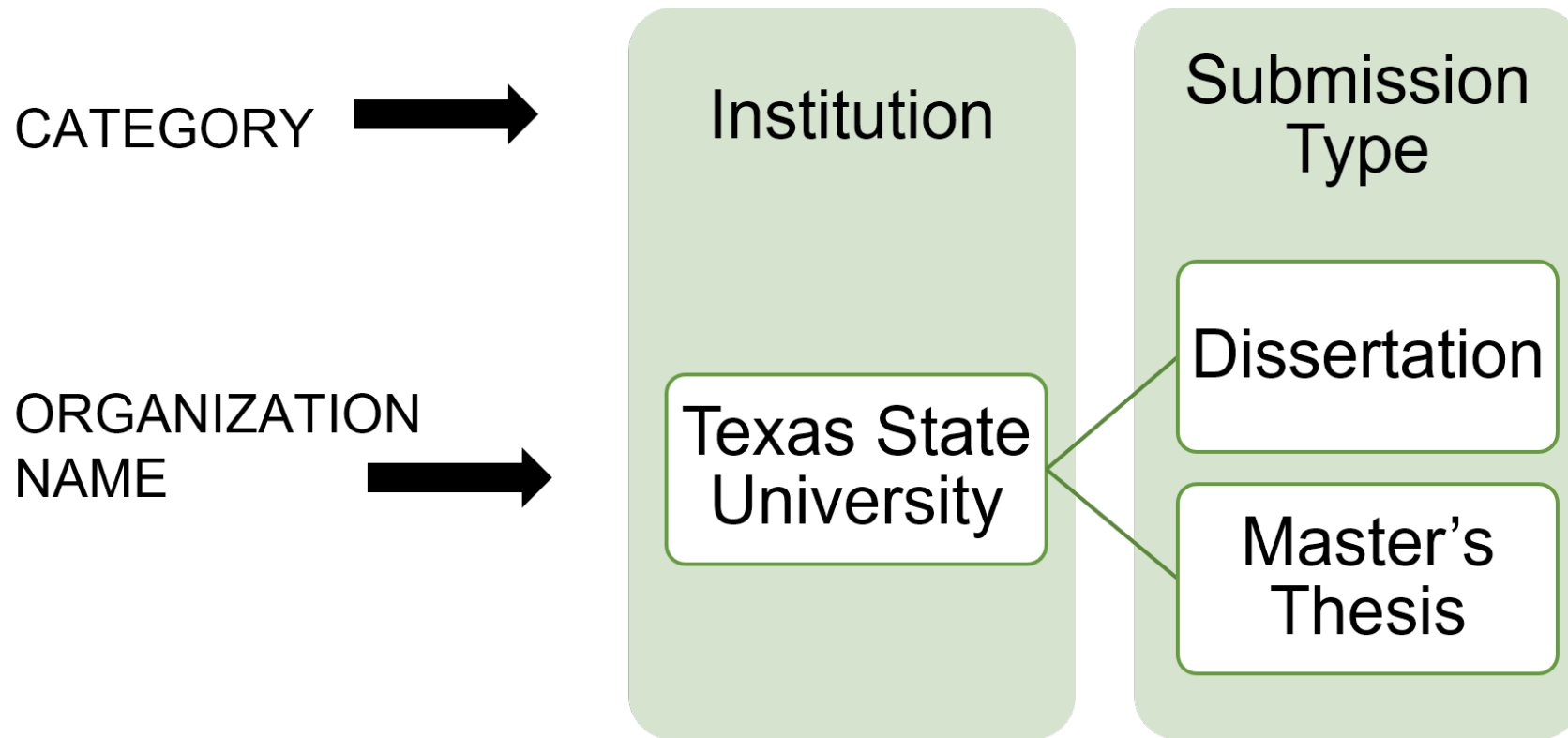| College /		Degree Level
College of Arts & Sciences 2		Doctoral ←
College		
College of Health 1		Master's
College		

Degree Level

Doctoral

Master's

Start Doctoral Submission

Institution with decentralized ETD processing but IR requires the same information from all.

CATEGORY ➡️

ORGANIZATION NAME ➡️

Institution

Texas State University

Submission Type

Dissertation

Master's Thesis

Use filters to view submissions for specific College

Institution

University XYZ

Degree

- Master of Arts
- Master of Education
- Master of Public Health
- Master of Science
- Doctor of Education
- Doctor of Philosophy
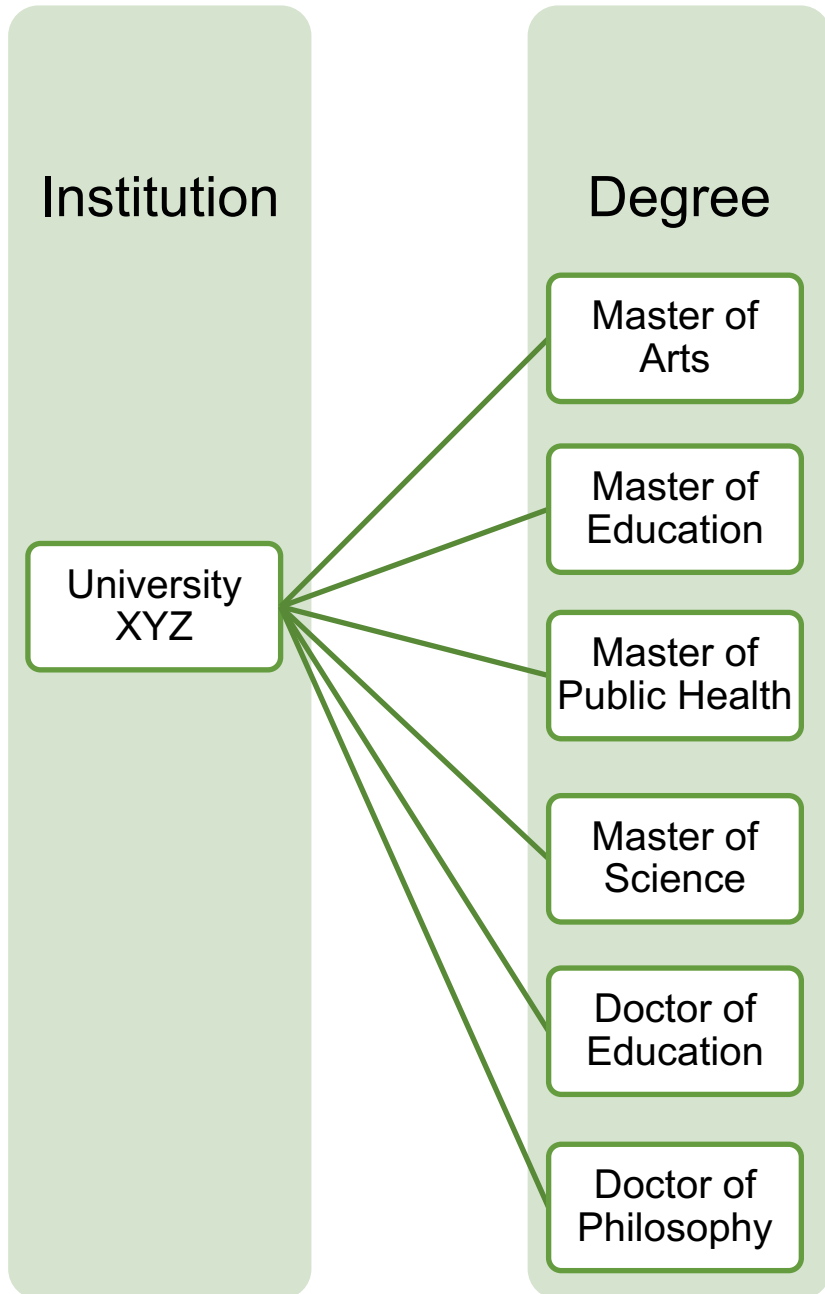
Creating an Organization = Creating a workflow (submission form)

Options are endless

Plan carefully

Once a submission is made on an organization's workflow, the workflow cannot be deleted or moved.

Customizing Workflows (aka submission forms)

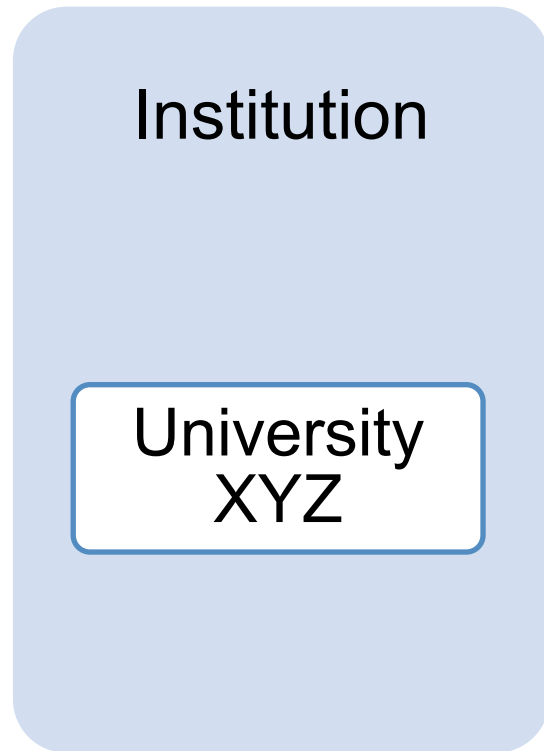# Preset workflow at Institution Level

These are the default settings – do not delete anything

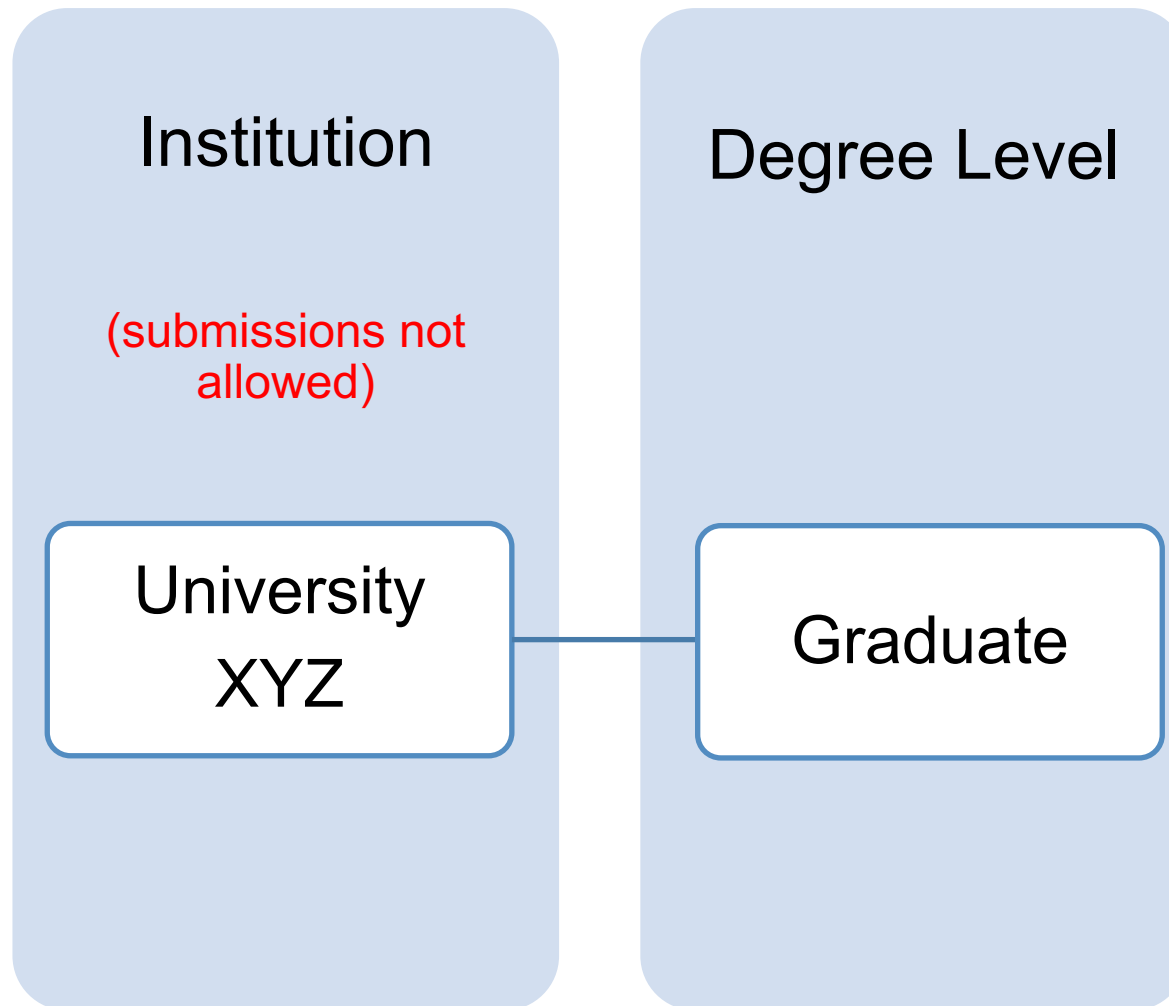Edit with caution and only after organizations and workflows have been planned, mapped out, and tested.

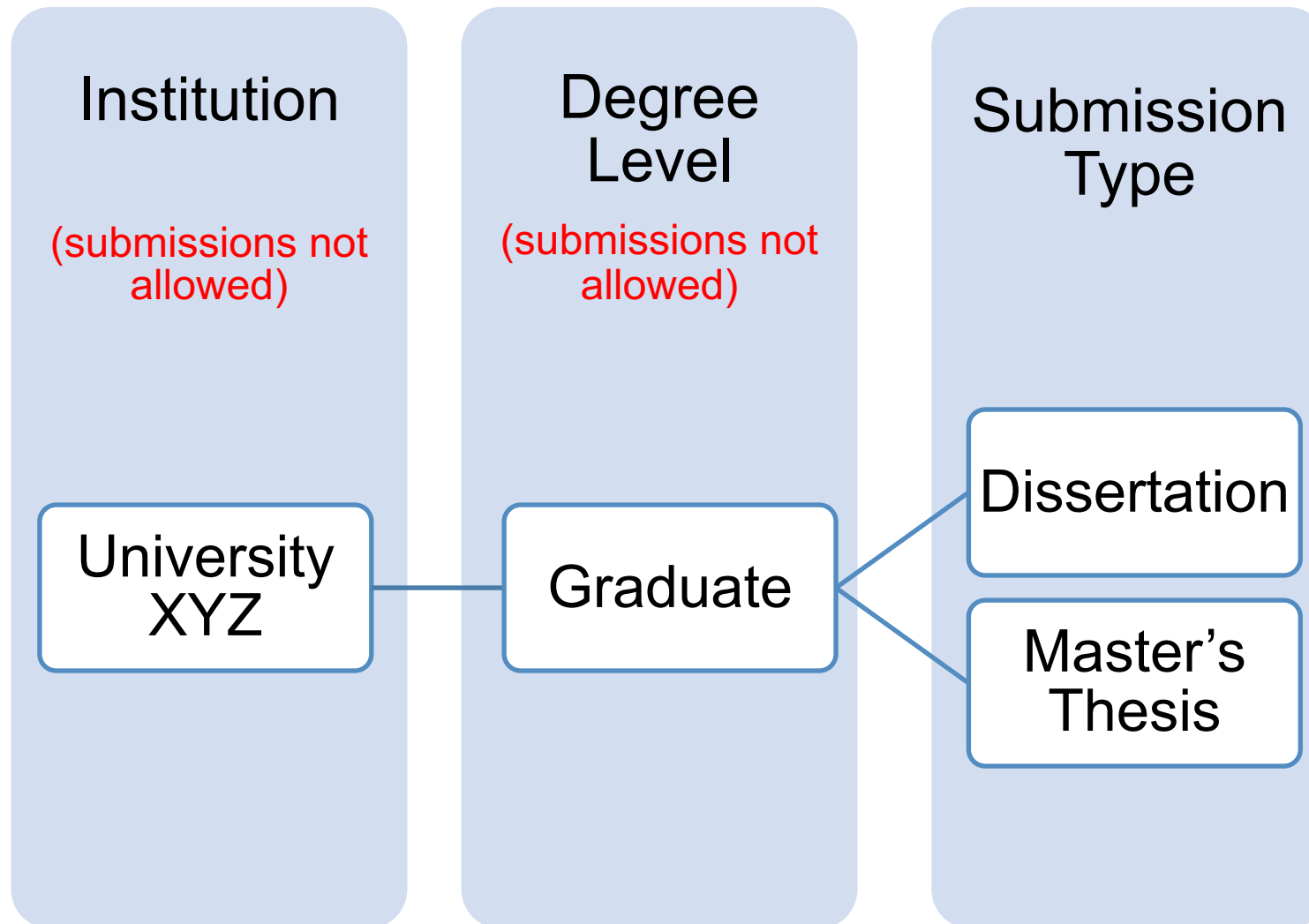NEVER accept submissions at the Institution Level.
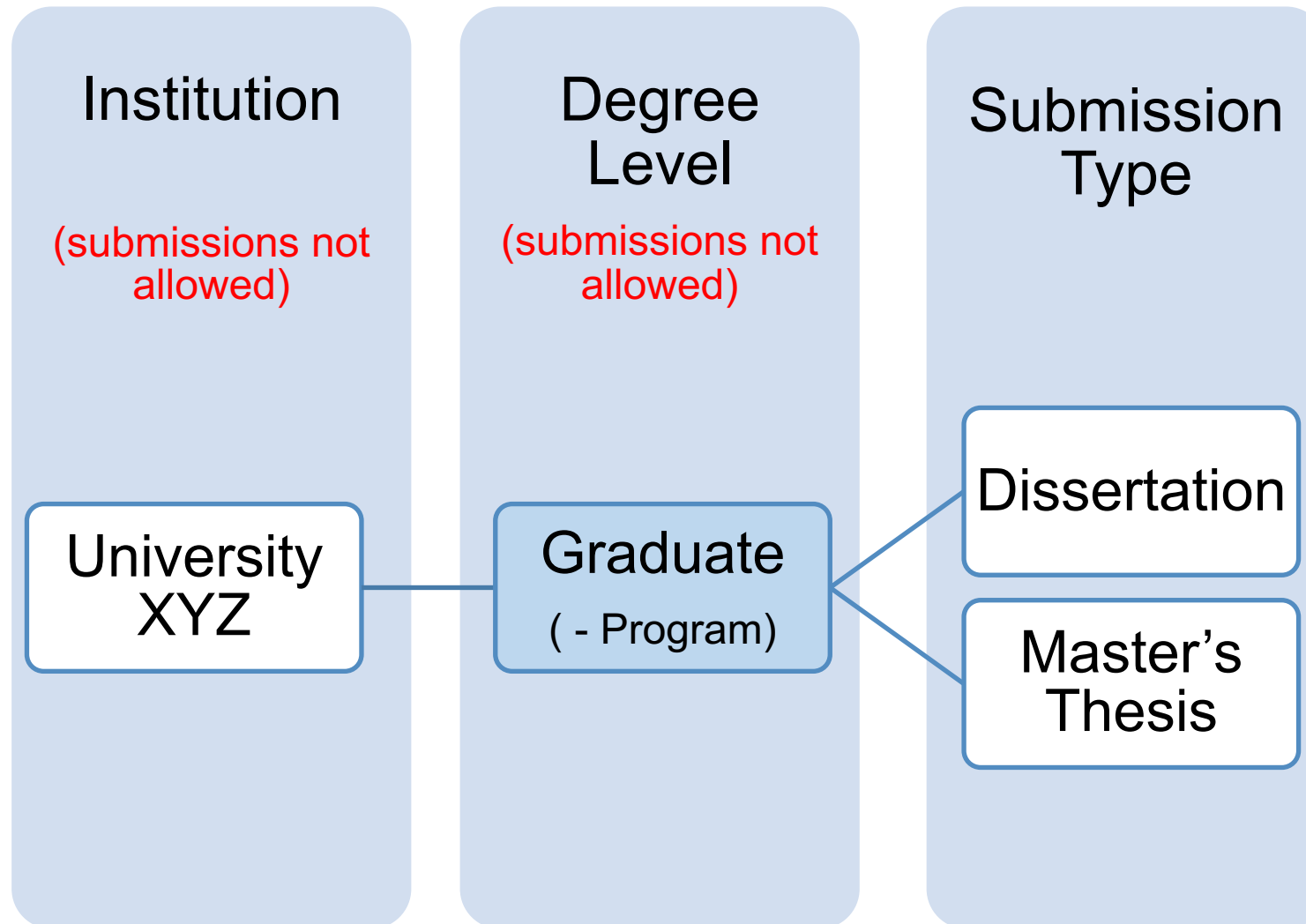
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Default workflow at Institution level

Child inherits parent (Institution) workflow

Still inheriting

Let's customize Graduate workflow

Institution	Degree Level	Submission Type
(submissions not allowed)	(submissions not allowed)	

University XYZ — Graduate (- Program) — Dissertation / Master's Thesis
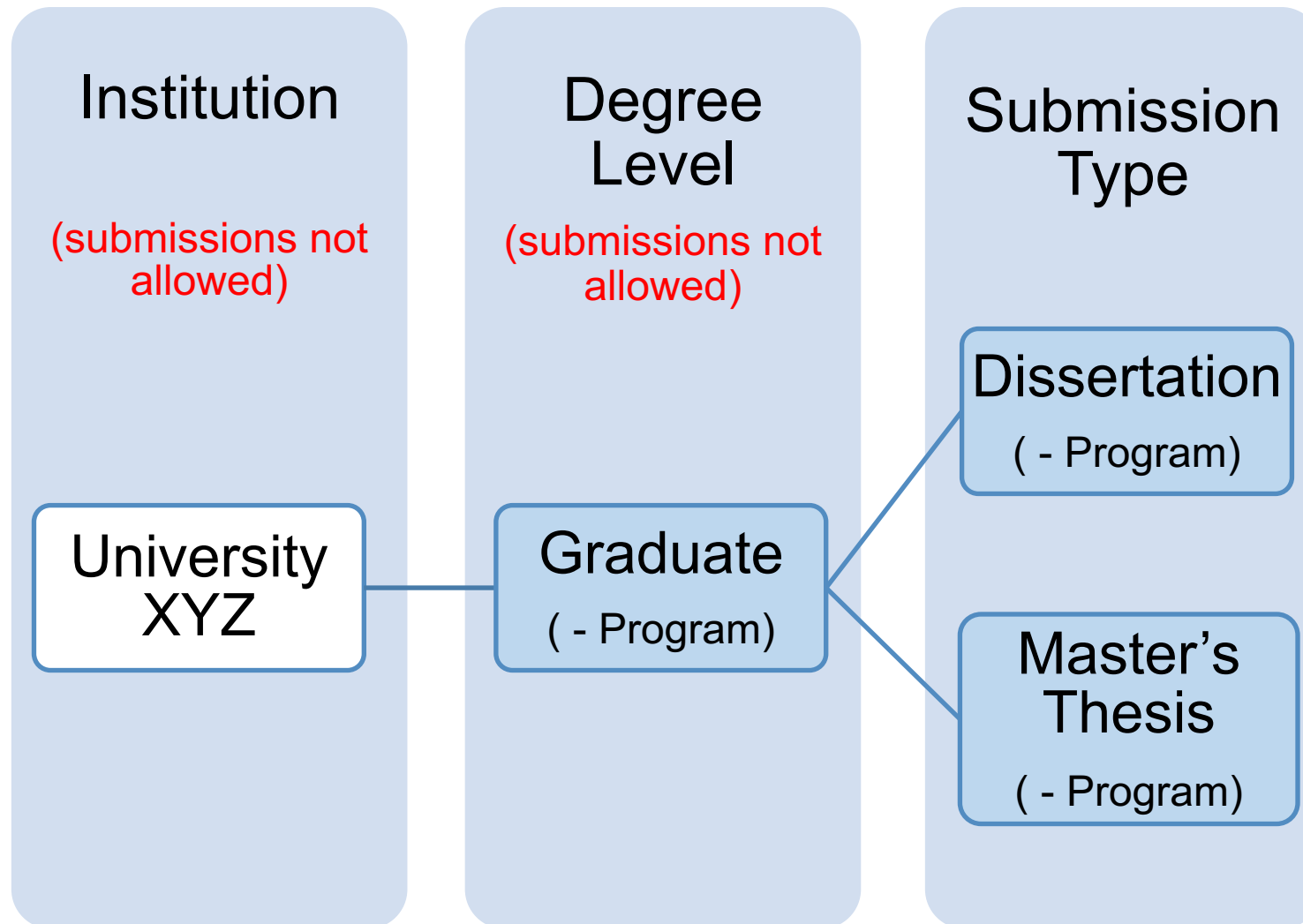
Add Workflow Step ⓘ

1. PERSONAL INFORMATION

These instructions are shown at the begining of this workflow st
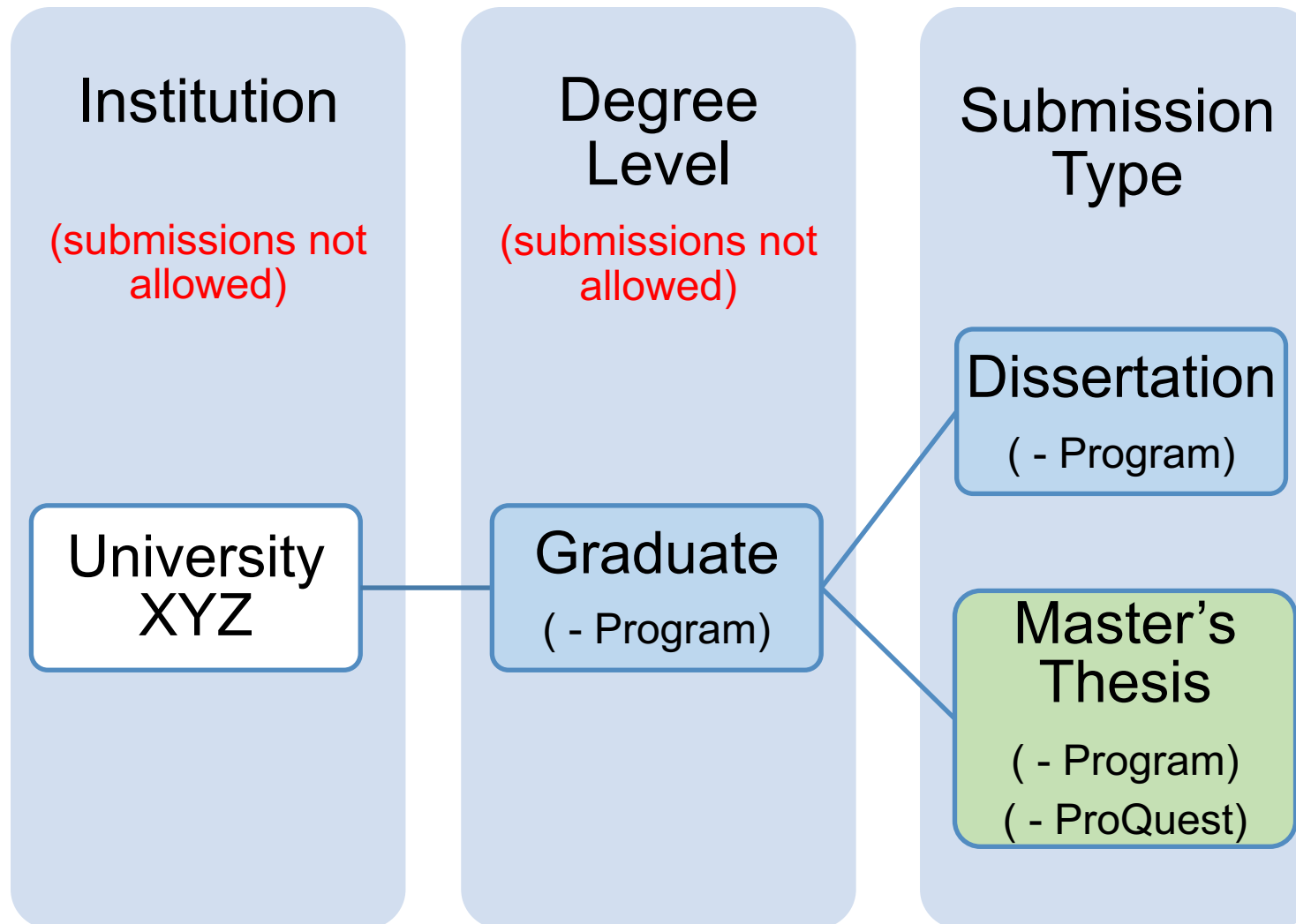
Add Field ⓘ

1. First Name*
2. Middle Name
3. Last Name*
4. Email*
5. ORCID
6. Institutional ID
7. Year of Birth
8. School
9. College*
10. ~~Program~~
11. Department*
12. Degree*
13. Major*
14. Permanent Phone*
15. Permanent Address*
16. Permanent Email*
17. Current Phone
18. Current Address

Children (Dissertation and Master's Thesis) inherit parent (Graduate) settings

Institution

(submissions not allowed)

Degree Level

(submissions not allowed)

Submission Type

University XYZ

Graduate

(- Program)

Dissertation

(- Program)

Master's Thesis

(- Program)

Let's customize Master's Thesis workflow

Institution

(submissions not allowed)

Degree Level

(submissions not allowed)

Submission Type

University XYZ

Graduate

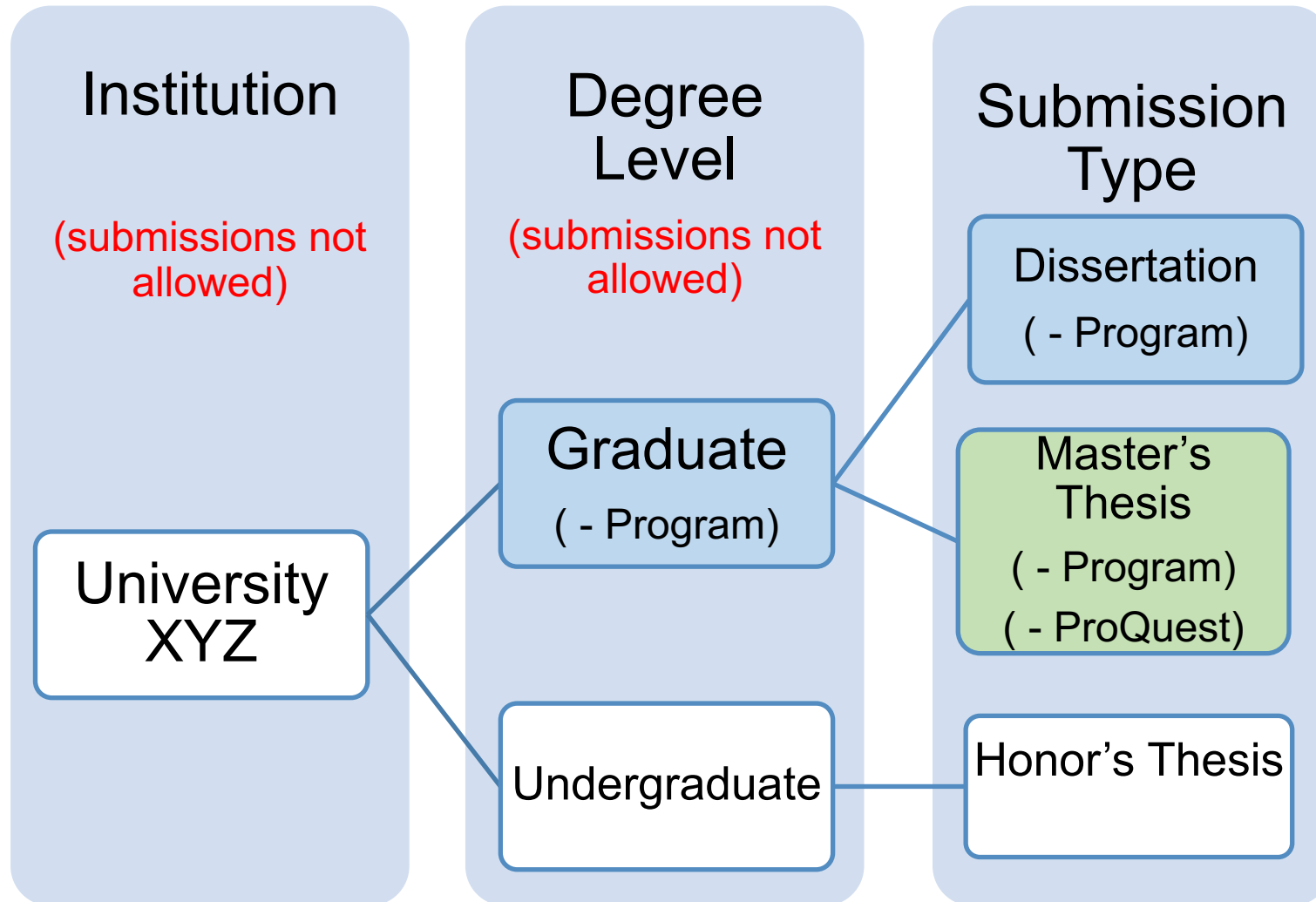(- Program)

Dissertation

(- Program)

Master's Thesis

(- Program)
(- ProQuest)

New Degree Level inherits parent (Institution) settings
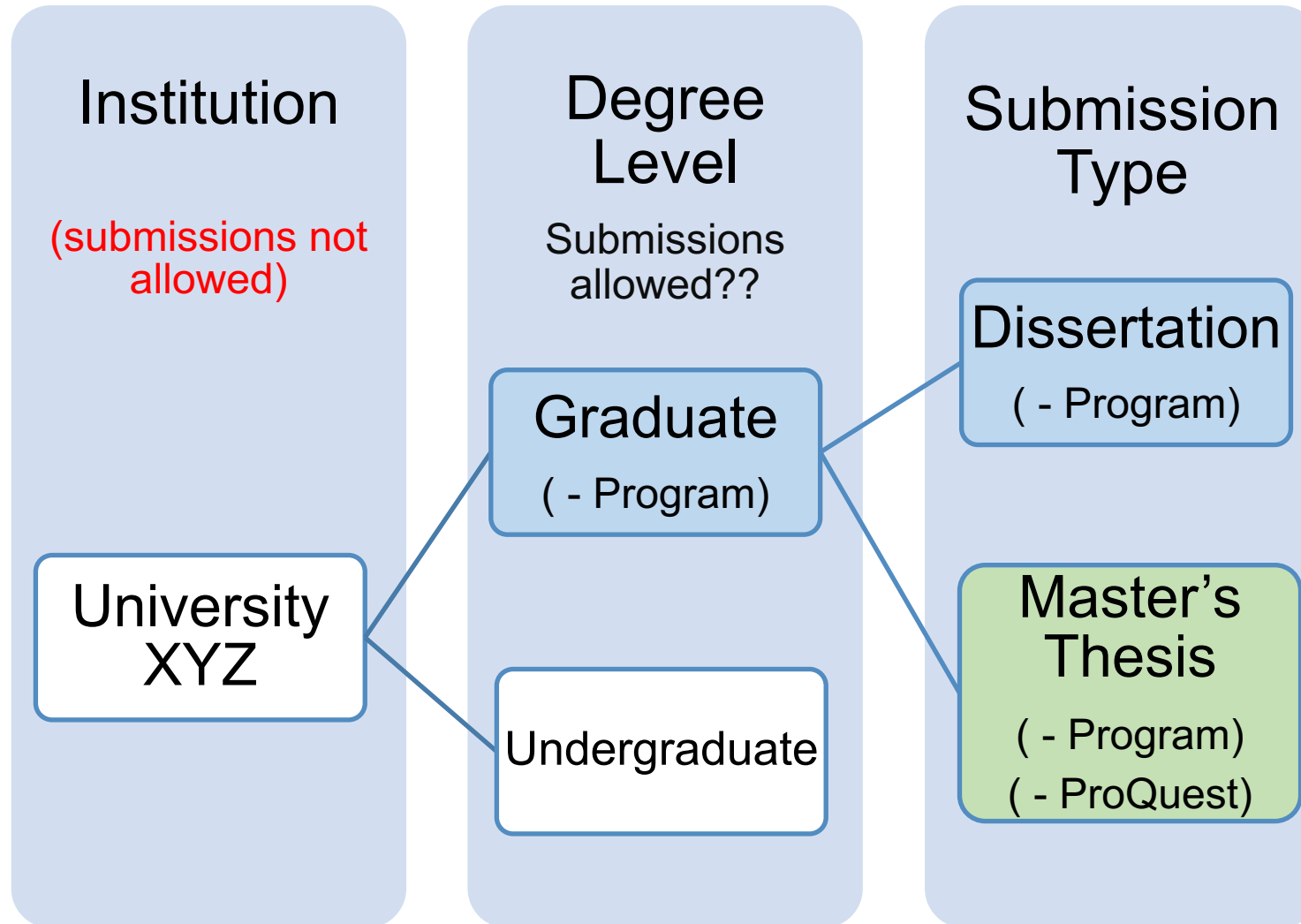
New submission type inherits parent (Undergraduate) settings

Institution

(submissions not allowed)

Degree Level

(submissions not allowed)

Submission Type

Dissertation
(- Program)

Graduate
(- Program)

Master's Thesis
(- Program)
(- ProQuest)

University XYZ

Undergraduate

Honor's Thesis

Recap of Organizations and Workflows

o   Creating Organizations = Creating Workflows and workflows in Vireo are the same as submission forms.

o   The workflow of the parent organization is inherited by the children organizations when they are created.

o   Workflows can be easily customized at the child level.

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For more information and tips….

see the section on "Creating Organizations" in

Vireo User Documentation

https://bit.ly/2Z56h3Z

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Enhanced field control for filtering, flagging, and tracking

Field Profile

General	Advanced		Controlled Vocabulary

Label

First Name

Repeatable: Yes **No**   Flagged: Yes **No**

Required: **Yes** No   Logged: Yes **No**

Disabled: Yes **No**   Overridable: **Yes** No

Hidden: Yes **No**

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Flagged field

Settings

Label

Institutional ID

Repeatable:
Yes **No**

Flagged:
Yes No

Required:
Yes **No**

Logged:
Yes **No**

Staff View

Custom Actions [-]

☐ **Enrolled in Thesis/Dissertation course**

☐ **All degree requirements met**

Flagged Fields [-]

Institutional ID:

123456789

Logged field

Settings

Label

First Name

Repeatable:
Yes **No**

Flagged:
Yes **No**

Required:
Yes No

Logged:
Yes No

Staff View

ACTION LOG

Action By	Action / Comment
Stephanie Larrison	First Name was changed from Ste...
Stephanie Larrison	First Name was set to Steph
Stephanie Larrison	Submission created.

Filter and Sort by ANY Field

Please select which columns should be displayed by dragging into or out of the list of displayed columns.

Displayed Columns

- ID
- College
- Last Name
- First Name
- Status
- Title

Disabled Columns

- Abstract
- Administrative Files
- Approval Date
- Archived Files
- Assigned To
- Choose License
- Committee Approval Date
- Committee Chair
- Committee Contact Email
- Committee Embargo Approval

Multiple filters

Further Filter By: [-]

STATUS

In Progress

+ Active

+ Archived

COLLEGE

GRADUATION SEMESTER

📅 Choose Date

Add Filter

DEGREE

PROQUEST EMBARGOS

Please select which search filter options should be displayed by dragging into or out of the list of displayed options.

Displayed Filters

Status

College

Graduation Semester

Degree

ProQuest Embargos

Disabled Filters

Abstract

Administrative Files

Approval Date

Archived Files

Assigned To

Choose License

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Improved metadata

Assigned Metadata Key in Advanced Field Settings

| General | Advanced | Controlled Vocabulary |

Metadata Key

thesis.degree.major   **DO NOT EDIT**

Input Type

INPUT_TEXT ▾

Help

Enter the discipline you specialized in.

Based upon "Texas Digital Library Descriptive Metadata Guidelines for Electronic Theses and Dissertations, Version 2.0"

Change the Label, NOT the Metdata Key

Metadata Key - thesis.degree.major

Label - Major

The Label, Major, can be changed to any relevant term such as

- Mayor

- Major field of study

- Specialization

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Controlled vocabularies

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Assign Controlled Vocabularies in Field Settings

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Create Controlled Vocabularies in Workflow Management tab of Settings

CONTROLLED VOCABULARY MANAGEMENT

1. 👤 Colleges
2. 👤 Programs
3. 👤 Departments
4. 🌐 Degrees
5. 👤 Majors
6. 🌐 Graduation Months
7. 👤 Submission Types
8. 👤 Subjects
9. 🌐 Languages
10. 👤 Committee Members
11. 🌐 Default Embargos
12. 🌐 Proquest Embargos
13. 👤 Manuscript Allowed File Extensions
14. 👤 Administrative Groups

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Add Controlled Vocabulary

Add Controlled Vocabulary ✕

Name

Name of the new controlled vocabulary

Cancel   Create

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Upload Controlled Vocabularies

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On screen editor

Name	Definition	Contacts	Identifier	Actions
				+
Accounting				✏️ 🗑️
Aerospace Engineering				✏️ 🗑️
Agribusiness				✏️ 🗑️
Agricultural Communications & Journalism				✏️ 🗑️

Majors

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Recap

- Creating Organizations = Creating Workflows and workflows in Vireo are the same as submission forms.

- The workflow of the parent organization is inherited by the children organizations when they are created

- There are many more field settings for customization, including determining which fields to track in the Action Log, and which to assign a Controlled Vocabulary.

- Every field has a preset Metdata Key that is necessary for exporting data correctly.

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To Remember

NEVER accept submissions at the Institution Level

NEVER change a Metadata Key, change the label of a field instead.

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QUESTIONS?

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Thank you for attending!

Documentation for Vireo 4.0 is at https://bit.ly/2Z56h3Z

Ask questions and share information on listserv
tdl-vireo-request@utlists.utexas.edu

Code and technical documentation
https://github.com/TexasDigitalLibrary/Vireo

Ask Stephanie at Larrison@txstate.edu

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