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

- Web cam on/off
- Microphone on/off and “switch to phone audio”
- Hang up / leave meeting
- Chat
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
Agenda

About Vireo
Organizations and Categories
Customizable submission workflows
Enhanced field control for filtering, flagging, and tracking
Improved metadata
Controlled vocabularies
Audience Q & A
About

History
- IMLS Grant
- Vireo Users Group
- Development

Why Vireo 4
- Aging, unsupported codebase
- User experience enhancements
- Added functionality
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.
Organization tab
## Organization tab – Default workflow steps

<table>
<thead>
<tr>
<th>Manage Institution Workflow</th>
<th>Add Workflow Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Institution Workflow</td>
<td>Add Workflow Step</td>
</tr>
</tbody>
</table>

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

- Simply labels to help organize multiple submission forms
- Default labels are suggestions, you may create your own
- Go to Settings > Application > Organization Settings to modify Organization Categories.
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.
ORGANIZATIONS AND WORKFLOWS

Degree / College / Department / Degree Level

College of Arts & Sciences
College of Health

Degree Level

Doctoral
Master's
Begin by choosing your College

- College of Arts & Sciences
- College of Health

The number indicates there are more options to choose.
College of Arts & Sciences
College of Health

Degree Level
- Doctoral
- Master's
Institution with decentralized ETD processing but IR requires the same information from all.
Use filters to view submissions for specific College.

<table>
<thead>
<tr>
<th>ID</th>
<th>College</th>
<th>Last Name</th>
<th>First Name</th>
<th>Status</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>College of Arts &amp; Sciences</td>
<td>Larrison</td>
<td>Stephanie</td>
<td>In Progress</td>
<td>My PhD on dogs and cats</td>
</tr>
</tbody>
</table>
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.
Default workflow at Institution level

Institution

University
XYZ
Child inherits parent (Institution) workflow

- **Institution**: University XYZ
- **Degree Level**: Graduate

(submissions not allowed)
Still inheriting

Institution
University XYZ
(submissions not allowed)

Degree Level
Graduate
(submissions not allowed)

Submission Type
Dissertation
Master’s Thesis
Let’s customize Graduate workflow

Institution

University XYZ

(submissions not allowed)

Degree Level

Graduate

(submissions not allowed)

Connection to

Master’s Thesis

Dissertation

Submission Type
Manage Graduate Workflow

Add Workflow Step

1. PERSONAL INFORMATION

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.
Let’s customize Master’s Thesis workflow

Institution
(submissions not allowed)

Degree Level
(submissions not allowed)

Submission Type

Dissertation
(- Program)

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

University XYZ

Graduate
(- Program)
New Degree Level inherits parent (Institution) settings

- **Institution**: University XYZ
  - (submissions not allowed)

- **Degree Level**: Graduate
  - Submissions allowed??

- **Submission Type**:
  - Dissertation
    - ( - Program)
  - Master’s Thesis
    - ( - Program)
    - ( - ProQuest)
  - Undergraduate
New submission type inherits parent (Undergraduate) settings

Institution
University XYZ (submissions not allowed)

Degree Level
Graduate (submissions not allowed)

Submission Type
Dissertation (- Program)
Master’s Thesis (- Program) (- ProQuest)
Honor’s Thesis
Recap of Organizations and Workflows

- 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.
- Workflows can be easily customized at the child level.
For more information and tips....

see the section on “Creating Organizations” in

Vireo User Documentation

Enhanced field control for filtering, flagging, and tracking
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

Staff View

ACTION LOG

<table>
<thead>
<tr>
<th>Action By</th>
<th>Action / Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stephanie Larrison</td>
<td>First Name was changed from Ste</td>
</tr>
<tr>
<td>Stephanie Larrison</td>
<td>First Name was set to Steph</td>
</tr>
<tr>
<td></td>
<td>Submission created.</td>
</tr>
</tbody>
</table>
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
  - [Choose Date]
  - Add Filter

- GRADUATION SEMESTER
  - Choose Date

- DEGREE

- PROQUEST EMBARGOS

Displayed Filters:
- Status
- College
- Graduation Semester
- Degree
- ProQuest Embargos

Disabled Filters:
- Abstract
- Administrative Files
- Approval Date
- Archived Files
- Assigned To
- Choose License

Source: tdl.org
Improved metadata
Assigned Metadata Key in Advanced Field Settings

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

Metadata Key

thesis.degree.major

DO NOT EDIT

Input Type

INPUT_TEXT

Help

Enter the discipline you specialized in.
Change the Label, NOT the Metadata 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
Controlled vocabularies
Assign Controlled Vocabularies in Field Settings

Controlled Vocabulary

Majors
Create Controlled Vocabularies in Workflow Management tab of Settings

<table>
<thead>
<tr>
<th>Controlled Vocabulary Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Colleges</td>
</tr>
<tr>
<td>2. Programs</td>
</tr>
<tr>
<td>3. Departments</td>
</tr>
<tr>
<td>4. Degrees</td>
</tr>
<tr>
<td>5. Majors</td>
</tr>
<tr>
<td>6. Graduation Months</td>
</tr>
<tr>
<td>7. Submission Types</td>
</tr>
<tr>
<td>8. Subjects</td>
</tr>
<tr>
<td>9. Languages</td>
</tr>
<tr>
<td>10. Committee Members</td>
</tr>
<tr>
<td>11. Default Embargos</td>
</tr>
<tr>
<td>12. Proquest Embargos</td>
</tr>
<tr>
<td>13. Manuscript Allowed File Extensions</td>
</tr>
<tr>
<td>14. Administrative Groups</td>
</tr>
</tbody>
</table>
Add Controlled Vocabulary

Add Controlled Vocabulary

Name

Name of the new controlled vocabulary

Cancel  Create
Upload Controlled Vocabularies

Manage Controlled Vocabularies

Upload to:
Honors Embargo

Browse Honors Embargo.csv

Please select a file and click Upload to continue with import.

Export CSV  Cancel  Upload
### On screen editor

<table>
<thead>
<tr>
<th>Name</th>
<th>Definition</th>
<th>Contacts</th>
<th>Identifier</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aerospace Engineering</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agribusiness</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agricultural Communications &amp; Journalism</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 Metadata Key that is necessary for exporting data correctly.

tdl.org
To Remember

**NEVER** accept submissions at the Institution Level

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