VIREO 3.0

New features and fixes

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Vireo @TDL
Top 3 Enhancement Requests from 2014 vote

- Designated actions should have an option to trigger emails to designated roles or individuals.

- The process for students to submit a corrected manuscript should be improved.

- Administrative users should be able to export a spreadsheet of data in specified columns from a filtered list.
What else was added to Vireo as a result of 2014 voting?

- Added ability to email or cc designated roles or individuals from Vireo.
- Improved how Vireo handles multiple submissions - preventing invalid resubmissions while allowing submissions for a different degree.
- Added separate and optional embargo period for ProQuest submissions.
- URL to published manuscript was added as an email template variable.
New enhancements... continued

• Added ability to filter by individual Custom Action Checklist items

• Added ability to display individual Custom Action Checklist items in student view

• Added ability to work on multiple submissions at once in separate windows or tabs

• Added Action Log to a file export package
What about the 4th top request?

Vireo should have the option to set up lookup tables from csv. files in order to enhance metadata collection for local subject headings and keywords.

• Those who voted had vastly different interpretations of what this meant and what they planned to do with the functionality

• Will be addressed in future versions of Vireo
Feature 1: Email Workflows

- 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
- 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.

```
<table>
<thead>
<tr>
<th>Condition</th>
<th>Template</th>
<th>Recipient</th>
</tr>
</thead>
<tbody>
<tr>
<td>College</td>
<td>Information Studies</td>
<td>Administrative Group (Librarians)</td>
</tr>
<tr>
<td>Always</td>
<td>Librarian Head's Up</td>
<td>Administrative Group (Librarians)</td>
</tr>
<tr>
<td>Department</td>
<td>Chemical Engineering</td>
<td>Administrative Group (Grad School)</td>
</tr>
<tr>
<td>Always</td>
<td>Initial Submission</td>
<td>Administrative Group (Admin Group 1)</td>
</tr>
</tbody>
</table>
```

[ADD NEW]
Feature 1: Email Workflows

Creating Rules: Emails can be sent as an ETD changes to a new “State”.

- Submitted
- Corrections Received
- Approved
- Pending Publication
- Published
Feature 1: Email Workflows

Creating Rules: Once the “State” is selected, determine the “Condition”

- **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”.

The College, Department or Program will be drawn from the lists created in **Configurable Settings**. Users will/can continue to use existing Colleges, Departments and Programs.
Feature 1: Email Workflows

Creating Rules: Once the “State” is selected, determine the “Condition”
Feature 1: Email Workflows

Creating Rules: Select which Email Template you would like to go out

Email templates are still created and managed in the same way as in prior versions of Vireo
Feature 1: Email Workflows

Creating Rules: Select a “Recipient”

- **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.
Feature 1: Email Workflows

Creating Rules: Select a “Recipient” – Set email addresses in “Configurable Settings”

Add email to:
- Colleges
- Departments
- Programs

### AVAILABLE COLLEGES

<table>
<thead>
<tr>
<th>Name</th>
<th>Emails</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering</td>
<td><a href="mailto:rsteans@gmail.com">rsteans@gmail.com</a>, <a href="mailto:rsteans@austin.utexas.edu">rsteans@austin.utexas.edu</a></td>
<td>Edit</td>
</tr>
<tr>
<td>Liberal Arts</td>
<td><a href="mailto:steve.trevor@themysdra.net">steve.trevor@themysdra.net</a>, <a href="mailto:dilana.prince@themysdra.net">dilana.prince@themysdra.net</a></td>
<td>Edit</td>
</tr>
<tr>
<td>Natural Sciences</td>
<td><a href="mailto:m.dg.tyson@science.net">m.dg.tyson@science.net</a>, <a href="mailto:b.honeydew@science.net">b.honeydew@science.net</a></td>
<td>Edit</td>
</tr>
<tr>
<td>Information Studies</td>
<td><a href="mailto:rsteans@austin.utexas.edu">rsteans@austin.utexas.edu</a>, <a href="mailto:kristi.park@austin.utexas.edu">kristi.park@austin.utexas.edu</a></td>
<td>Edit</td>
</tr>
<tr>
<td>Communications</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[ADD NEW]  [BULK ADD]
Feature 1: Email Workflows

Creating Rules: Select a “Recipient” – Set email addresses in “Configurable Settings”

AVAILABLE ADMINISTRATIVE GROUPS

<table>
<thead>
<tr>
<th>Name</th>
<th>Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Group 1</td>
<td><a href="mailto:rsteans@austin.utexas.edu">rsteans@austin.utexas.edu</a>, <a href="mailto:kirstl.park@austin.utexas.edu">kirstl.park@austin.utexas.edu</a></td>
</tr>
<tr>
<td>Admin Group 2</td>
<td><a href="mailto:rsteans@austin.utexas.edu">rsteans@austin.utexas.edu</a></td>
</tr>
<tr>
<td>Librarians</td>
<td><a href="mailto:rsteans@austin.utexas.edu">rsteans@austin.utexas.edu</a>, <a href="mailto:kristl.park@austin.utexas.edu">kristl.park@austin.utexas.edu</a></td>
</tr>
<tr>
<td>Thesis Office</td>
<td><a href="mailto:rsteans@austin.utexas.edu">rsteans@austin.utexas.edu</a></td>
</tr>
<tr>
<td>Grad School</td>
<td><a href="mailto:rsteans@gmail.com">rsteans@gmail.com</a></td>
</tr>
<tr>
<td>Super Group</td>
<td><a href="mailto:clark.kent@superfriends.org">clark.kent@superfriends.org</a>, <a href="mailto:bruce.wayne@superfriends.org">bruce.wayne@superfriends.org</a>, <a href="mailto:hal.jordan@superfriends.org">hal.jordan@superfriends.org</a></td>
</tr>
</tbody>
</table>

Add Administrative Group

Admin Group Name: Super Group

Emails: clark.kent@superfriends.org, bruce.wayne@superfriends.org, hal.jordan@superfriends.org

[ADD NEW] [BULK ADD]
Feature 1: Email Workflows

Creating Rules: Select a “Recipient” – Set email addresses in “Configurable Settings” at

Send email to: The Advisor at the advisor email address in Vireo

Advisor Email: rsteeans@gmail.com
Send Advisor Email

Send email to: The Assignee at the Assignee’s email

Assigned To: TDL Admin

My Preferences
DISPLAY NAME
TDL Admin
PREFERRED EMAIL
admin@tdl.org
☐ I want to receive a copy of all emails sent by the system on my behalf.

Texas Digital Library
Feature 1: Email Workflows

Putting it all together:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Template</th>
<th>Recipient</th>
</tr>
</thead>
<tbody>
<tr>
<td>College = none then email</td>
<td>Advisor</td>
<td></td>
</tr>
<tr>
<td>Department = Film then email Librarian Head's Up</td>
<td>Advisor</td>
<td></td>
</tr>
</tbody>
</table>
Feature 2: Improved “Needs Corrections”

Setting an item to “Needs Corrections” and sending a template email can send a student to (1) the “Submission History” page.
Feature 2: Improved “Needs Corrections”

(2) With the new variable offered in Email Templates, you can send them to the submission itself.

The student will see a RED window with instructions for submitting corrections either at center screen or in the margin.
Feature 2: Improved “Needs Corrections”

Student can click to jump to the document replacement area
Feature 2: Improved “Needs Corrections”

Student may upload new manuscripts or supplemental files.

Student will be informed that the file will be renamed.
Feature 2: Improved “Needs Corrections”

Upon document replacement, student clicks “Corrections Completed”

Student must verify that they “are sure”
Feature 3: Columns and Reports

From the “List View”, users can:

**Customize View** to manage which Columns they see displayed

Under “Filter Options”, users can “Save Current Filter”
Feature 3: Columns and Reports

“Save Filters” now includes the option to save Columns

- Save particular views that are useful
- Can help generate Reports!

![Save Filters](image)
Feature 3: Columns and Reports

Under **Advanced Features**, “**Download Export**”

Select **Excel Export** to get your Excel Report
Feature 3: Columns and Reports

Users may choose from their “Saved Filters”, to generate an Excel report with exactly the data they need from both rows and columns.
Feature 3: Columns and Reports

Users may choose from their “Saved Filters”, including options “With Columns” to generate an Excel report with exactly the data they need from both rows and columns.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ID</td>
<td>Student name</td>
<td>Status</td>
<td>Assignee</td>
<td>Title</td>
<td>Submission date</td>
<td>College</td>
<td>Approval date</td>
<td>Embargo type</td>
</tr>
<tr>
<td>2</td>
<td>Admin, TDL</td>
<td>Corrections</td>
<td>Received</td>
<td></td>
<td>Engineering and me</td>
<td>02/19/2015</td>
<td>Engineering</td>
<td></td>
<td>None</td>
</tr>
<tr>
<td>3</td>
<td>Larson, Stephanie</td>
<td>Submitted</td>
<td>Botany automated email</td>
<td></td>
<td>Sunday Afternoon Test</td>
<td>02/22/2015</td>
<td>Engineering</td>
<td></td>
<td>Patent Hold</td>
</tr>
<tr>
<td>4</td>
<td>Admin, TDL</td>
<td></td>
<td>Submitted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Patent Hold;6-month Journal Hold (PROQUEST)</td>
</tr>
</tbody>
</table>

Texas Digital Library
Additional Filter Options

Users may now filter by “Custom Action Checklist”. Vireo will filter for items that have been checked/completed.
Custom Action Public/ Private

Users may now filter by “Custom Action Checklist”. Vireo will filter for items that have been checked/completed.

View Application

CUSTOM ACTIONS CHECKLIST

1. ✔ Pay $50 graduation bill
2. ✔ Student submitted graduation form
3. ✔ Student came by office and was nice
4. ✔ Student was not annoying
5. ✔ Student needs to salute the flag
6. ✔ Visible to Student

[ADD NEW]
ORCID

ORCID SETTINGS

- Validate against ORCID API
- Validate to make sure First and Last Name are a match
## Embargoes – Default and ProQuest

<table>
<thead>
<tr>
<th>Default Embargos</th>
</tr>
</thead>
<tbody>
<tr>
<td>System</td>
</tr>
<tr>
<td>--</td>
</tr>
<tr>
<td>None</td>
</tr>
<tr>
<td>Journal Hold</td>
</tr>
<tr>
<td>Patent Hold</td>
</tr>
<tr>
<td>Other Embargo Period</td>
</tr>
<tr>
<td>1 year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ProQuest Embargos</th>
</tr>
</thead>
<tbody>
<tr>
<td>System</td>
</tr>
<tr>
<td>--</td>
</tr>
<tr>
<td>6-month Journal Hold</td>
</tr>
<tr>
<td>1-year Journal Hold</td>
</tr>
<tr>
<td>2-year Journal Hold</td>
</tr>
<tr>
<td>Flexible/Delayed Release Embargo Period</td>
</tr>
<tr>
<td>None PQ</td>
</tr>
</tbody>
</table>

ProQuest has specific embargo periods. In order to ensure alignment, the new Vireo system provides ProQuest Embargos as an option.
Embargoes – Default and ProQuest

In order to see and access the ProQuest Embargoes, students must select the UMI/ProQuest license. Selecting this option will trigger the “UMI – YES” option in filters.
Embargoes – Default and ProQuest

If ProQuest is selected, Students must select an Embargo from each Embargo Option menu before proceeding.
Embargoes – Default and ProQuest

If the ProQuest Embargo is hidden or not selected, the ProQuest Embargoes will not appear. This ensures that all items destined for ProQuest have the proper license.
Embargoes - Management

## AVAILABLE EMBARGO TYPES

- **Available Embargo Types**
  - Remove all embargo types
  - Sort embargo types by duration

### Default Embargos

<table>
<thead>
<tr>
<th>System</th>
<th>Name</th>
<th>Description</th>
<th>Display</th>
<th># of Months</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>None</td>
<td>The work will be published after approval.</td>
<td>Yes</td>
<td>0</td>
<td>Edit</td>
</tr>
<tr>
<td>☒ Journal Hold</td>
<td>The work will be delayed for publication by one year because of a restriction from publication in an academic journal.</td>
<td>Yes</td>
<td>12</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>☐ Patent Hold</td>
<td>The work will be delayed for publication by two years because of patent related activities.</td>
<td>Yes</td>
<td>24</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>☐ Other Embargo Period</td>
<td>The work will be delayed for publication by an indefinite amount of time.</td>
<td>Yes</td>
<td>Indefinite</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>☐ 1 year</td>
<td>work will be delayed for one year</td>
<td>Yes</td>
<td>12</td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>

### ProQuest Embargos

<table>
<thead>
<tr>
<th>System</th>
<th>Name</th>
<th>Description</th>
<th>Display</th>
<th># of Months</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>None</td>
<td>The work will be published after approval.</td>
<td>Yes</td>
<td>0</td>
<td>Edit</td>
</tr>
<tr>
<td>☐ 6-month Journal Hold</td>
<td>The full text of this work will be held/restricted from worldwide access on the Internet for six months from the semester/year of graduation to meet academic publisher restrictions or to allow time for institutional review.</td>
<td>Yes</td>
<td>6</td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>
Embargoes – Check your work

• Global Embargoes cannot be deleted or edited, just disabled
• Global Embargoes will appear when we upgrade – but if you are using Embargoes with the same title, they will be disabled
• Your previous Embargoes from Vireo 2 will be added to Vireo 3 as Custom Embargoes
• Custom Embargoes are noted with a (*)
• ProQuest Embargoes will need to be disabled if you aren’t using them
• In short, please check your Embargoes to make sure you have enabled or disabled the correct Embargoes
Email Templates

- The functionality has changed – Users should now make a “copy” of the System Template emails with any edited content.
- Users cannot directly edit System Template/Global email templates.
- Any previous templates from your Vireo 2.0 will be placed into the Email Templates in Vireo 3.0 as “custom” templates.
- Custom Emails are indicated with a (*)
- Please check your data
Stopping Duplicate Entries from Students

Students who already have a submission in the system will be alerted that they already have an entry and be asked to continue their “In Progress” submission.
Stopping Duplicate Entries from Students

Students who are submitting a second ETD as they seek a second degree will be prevented from entering the same Major as previously submitted ETDs (in red).
Advisor “Comment” for Rejection of ETD

Faculty must now leave a “Comment” explaining why they have rejected either an Embargo or Application. Will appear in “Action Log.”

[Diagram of approval form with options for approving or rejecting embargo and application with a comments section]
Advisor Can “Unapprove” an ETD

If a Faculty has second thoughts or made a mistake, they may “Unapprove” if they leave a comment as to “why”
## Report Features

- Committee Members now separated by a semi-colon
- Shows all items from Action Checklist, including which items are checked
- Semi-colon between the Default and ProQuest Embargo
- ORCID ID as exported field

<table>
<thead>
<tr>
<th>ID</th>
<th>Student name</th>
<th>Status</th>
<th>Title</th>
<th>Submission</th>
<th>College</th>
<th>Committee members</th>
<th>Custom actions</th>
<th>ORCID</th>
<th>Embargo type</th>
</tr>
</thead>
</table>
| 1   | McAwesome, Buttons 1975- | Submitted Test | 02/19/2015 | Natural Sciences | Krumholz, Gad (Chair); Launder, Nick | ☑ Pay $50 graduation bill  
☑ Student submitted graduation form  
☐ Student came by office and was nice  
☑ Student was not annoying  
☐ Student needs to salute the flag | 0000-0002-7151-5613 | None; None PQ (PROQUEST) |
| 2   | Admin, TDLC 1975- | Submitted Test | 02/22/2015 | Engineering | Steans, Ryan | ☑ Pay $50 graduation bill  
☑ Student submitted graduation form  
☐ Student came by office and was nice  
☑ Student was not annoying  
☐ Student needs to salute the flag | 0000-0002-7151-5613 | Patent Hold; 6-month Journal Hold (PROQUEST) |
The Future of Vireo

 Rewrite using newer version of Play Framework

Feature requests that may be possible after the rewrite

- Create customized student submission forms and workflows
- Additional enhancements to use of Custom Actions Checklist items
- Enhanced metadata collection through the use of lookup tables or linking
- Incorporation of recommendations from TDL ETD Metadata Working Group
September 29-October 1
Austin, Texas
Access the Training Site

Training Vireo: https://training-etd.tdl.org/

User accounts: tdl.studentX@tdl.org (X = 1-18)
Password: tdlstudent
Support

As always:

http://tdl.org/support

Or

support@tdl.org