Vireo ETD System:
Online submission and management of electronic theses and dissertations
Summary

- Overview of Vireo
- Student Submission of ETDs
- Graduate School Management of ETDs
- Configuration Settings for Vireo
- Use of Vireo at Texas institutions of higher learning
About the Vireo ETD System

OVERVIEW
What is Vireo?

• Electronic thesis and dissertation submission and management system
  • Provided by the Texas Digital Library (TDL)
  • Consists of easy student submission interface and expert management system for graduate school staff
  • Provides for local review and approval of manuscripts
  • Approved ETDs can be deposited in TDL federated repository and local institutional repositories (IRs)
  • Based on ETD workflows at several Texas universities
Why switch to Vireo?

- You want to provide open access to all manuscripts (no cost to student, searchable by Google)
- You want access to TDL training and technical support.
- You need customizable options and views within the management system.
- You want the peace of mind that comes with preservation of files in TDL repositories.
Easy, intuitive online submission of ETDs

STUDENT SUBMISSION
Student Submission System

- Simple and intuitive – students will likely use it only once
- Autofill capability for some personal information (via Shibboleth distributed authentication)
- Allows embargoes on any document
- Allows for ETDs to go to UMI Dissertation Publishing
1. Verify your personal information.
2. Agree to the license.
3. Enter information about your document.
4. Upload main document and supplementary files.
5. Confirm your information and complete the submission.
System autofills name, e-mail, and school affiliation.

Verify Your Information

Please verify all of your personal information. Some of the information has been provided by your school; if this information is in error, you will need to correct it through the appropriate office at your school.

Required fields are indicated with an asterisk.

Personal Information

* First Name: Jane
* Last Name: Doe
* Email: jane.doe@school.edu
Year of Birth: 

Affiliation

* School: State University
* College: ...choose
* Department: 

You must enter a permanent, long-term address. If your present address is different, use the Current Address field.

Select the degree and major that are listed on your title page.

Your name should appear as it does on your title page. You can use Unicode characters, if your computer supports them.
License Agreement

You must agree to the non-exclusive license below in order to continue:

I grant the Texas Digital Library (hereafter called "TDL"), my home institution (hereafter called "Institution"), and my academic department (hereafter called "Department") the non-exclusive rights to copy, display, perform, distribute and publish the content I submit to this repository (hereafter called "Work") and to make the Work available in any format in perpetuity as part of a TDL, Institution or Department repository communication or distribution effort.

I understand that once the Work is submitted, a bibliographic citation to the Work can remain visible in perpetuity, even if the Work is updated or removed.

I understand that the Work's copyright owner(s) will continue to own copyright outside these non-exclusive granted rights.

I warrant that:

1. I am the copyright owner of the Work, or
2. I am one of the copyright owners and have permission from the other owners to submit the Work, or
3. My Institution or Department is the copyright owner and I have permission to submit the Work, or
4. Another party is the copyright owner and I have permission to submit the Work.

Based on this, I further warrant to my knowledge:

1. The Work does not infringe any copyright, patent, or trade secrets of any third party,
2. The Work does not contain any libelous matter, nor invade the privacy of any person or third party, and
3. That no right in the Work has been sold, mortgaged, or otherwise disposed of, and is free from all claims.

I agree to hold TDL, Institution, Department, and their agents harmless for any liability arising from any breach of the above warranties or any claim of intellectual property infringement arising from the exercise of these non-exclusive granted rights.

[By checking here you agree to the above license in its entirety.]

Agree and Continue>>

“…non-exclusive rights to copy, display, perform, distribute and publish the content…”

Student maintains copyright to the work, outside of the non-exclusive rights.
Student Submission Step 3: Document information

- Document information
- Committee & chair information
- Release options (embargoes, publication to UMI)
Student Submission Step 4: Upload Your Files

Upload Your Files

In this step you will upload your thesis or dissertation to the server. Optionally, you may upload additional supplementary files that will be available along with your document after publication.

Upload your manuscript

* Manuscript in PDF: [Browse] [Upload]

Upload supplementary files

Supplementary Files: [Browse] [Upload]

Save and Continue >>

There is no restriction on file formats students can upload.

Your thesis or dissertation can only be one file, and the only allowable file format is PDF. Please contact your school for help or information related to creating a PDF file.

SIZE QUOTA: no individual file may exceed 512 MB, and the total of all files must not exceed 4 GB.

Student may upload supplementary files in addition to the main thesis or dissertation.
Student Submission Step 5: Confirm & Submit

- Confirm & Submit

**About You**
- Name: User, Student
- Email: student1@tdl.org
- Phone: 555-555-5555
- Address: 123 Elm St. University, Texas 77777
  - [edit your personal information]

**Academic Affiliation**
- School: Vireo Training Class
- Degree: Ph. D.
- Major: Biology
  - [edit your personal information]

**Document Information**
- Title: Biology Dissertation Title
- Degree Date: May 2010
- Research Area: Biology

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Students may check all information and return to any previous step to make corrections using the bar at the top.
Submittal Complete

Please alert your departmental office that you have completed the Thesis and Dissertation submission process. View submission status

Once submission is complete, the student receives customizable instructions for other actions he or she must take outside the Vireo system.
Vireo’s interface for thesis office personnel

ETD MANAGEMENT
Management System for Grad School Offices

• Flexible and easy-to-use interface
• Manuscript review process tracking
• Customized document lists and customizable filters for individual users
• Export functionality
• Manages communication with students and faculty chairs
Management Interface: List available ETDs

Admin users can manage the list by using savable filters.
This list shows only active submissions that are currently under review.
Within an individual ETD record, an administrative user can see:

- the active, viewable ETD
- student and document metadata
- the status of the submission
- action log showing all actions taken on this record
- the custom action checklist showing actions that must be taken outside the Vireo system
Within an ETD record, an administrator can use the Add Comment feature to:

- generate e-mail notifications to the student and/or faculty adviser
- add updates about the status of the ETD or actions taken outside the system
- designate comments as public or private
As an ETD proceeds through the workflow, administrators can change its status to one of several options:

- Submitted
- Under Review
- Needs corrections
- Waiting on Requirements
- Approved
- Pending Publication
- On Hold
- Published**
- Withdrawn
- Cancelled

**Setting the status to “Published” automatically deposits the thesis into an institutional repository.**
Customizing Vireo for your institution

CONFIGURATION
Configuration settings

- Create customized submission instructions
- Customize e-mail templates and variables
- Customize drop-down menus used in student submission process
- Control appearance and filtering options within the user interface

Two levels of access: Regular administrative user and Manager (or Superuser)
Any administrative user can customize his or her interface to show certain columns, filters, and other information.
Administrative “superusers” can determine:

- when the system is accepting submissions
- customized submission instructions that appear to students
- a custom action checklist for actions that must be taken outside the Vireo system (such as signing of documents)
- who has administrative and superuser access
Administrative “superusers” can determine:

- default options for automated e-mails
- e-mail templates for common messages sent from the system to students and supervisors
Configuration Settings: Other Settings

Administrative “superusers” can customize the dropdown menus that appear in the student submission interface for:

- Colleges
- Degrees
- Document types
- Graduation months

**AVAILABLE COLLEGES**

1. College of Cool Stuff [Remove]
2. Liberal Arts [Remove]
3. Engineering [Remove]
4. Education [Remove]

[ADD NEW]

**AVAILABLE DEGREES**

1. B.A. (Undergraduate) [Remove]
2. D.M.A (Doctoral) [Remove]
3. M. A. (Masters) [Remove]
4. M. S. (Masters) [Remove]
5. Ed. D. (Doctoral) [Remove]
6. Ph. D. (Doctoral) [Remove]

[ADD NEW]

**AVAILABLE DOCUMENT TYPES**

1. Thesis (Undergraduate) [Remove]
2. Dissertation (Doctoral) [Remove]
3. Record of Study (Doctoral) [Remove]

[ADD NEW]

**AVAILABLE GRADUATION MONTHS**

1. August [Remove]
2. May [Remove]
3. December [Remove]

[ADD NEW]
Harvesting and Curating ETDs

THE FEDERATED ETD COLLECTION
The TDL Federated Repository collects ETDs from universities statewide.

- All ETDs appear in a single searchable location.
- Metadata harvested automatically from member repositories.
- Bitstream (i.e. ETD file) remains at home institution.
- Home institution identified within the federated repository.
The ETD in the TDL’s federated repository

The ETD in an institutional repository
Vireo was developed by the Texas Digital Library, originally for use by its member organizations.

The TDL developed Vireo and the TDL Federated Repository with grant funding from the Institute of Museum and Library Services. (IMLS GRANT #: LG - 05-07-0095-07)

Vireo is in production at Texas A&M University, the University of Texas at Austin, and Texas Tech University, with testing sites at several other TDL member schools (as of March 2010).

Once tested and deployed widely within the state, all source code, documentation, and training materials will be made publicly available under an open-source license.
In March 2010, TDL released an updated version of Vireo with bug fixes and new capabilities.

New capabilities and features include:

- Automated publishing to an institutional repository (via SWORD)
- Automated harvesting of ETDs to the TDL Statewide ETD Repository (via OAI-ORE)
- Full compliance with metadata standards
- User interface enhancements in management interface
- Complete installation instructions shipped with new version
For more information about Vireo:

- Go to the TDL Wiki: [http://wikis.tdl.org/tdl/Vireo](http://wikis.tdl.org/tdl/Vireo)
  - Vireo training videos - [https://wikis.tdl.org/tdl/Vireo/Videos](https://wikis.tdl.org/tdl/Vireo/Videos)
- Visit the TDL website: [http://www.tdl.org/](http://www.tdl.org/)
- Contact the TDL: [info@tdl.org](mailto:info@tdl.org)
For more information about Vireo, please visit the Texas Digital Library Web site at http://www.tdl.org or contact us at info@tdl.org.