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

TDL.ORG
TEXAS DIGITAL LIBRARY
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
Student Submission: 5-Step Process

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.
Student Submission Step 1: Verify your information

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

Affiliation

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

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Student maintains copyright to the work, outside of the non-exclusive rights.

“...non-exclusive rights to copy, display, perform, distribute and publish the content...”
Student Submission Step 3: Document information

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

**Upload supplementary files**

Supplementary Files:

There is no limit on the number or formats of supplementary files you may upload.

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

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.

Student may upload supplementary files in addition to the main thesis or dissertation.

There is no restriction on file formats students can upload.
Student Submission Step 5: Confirm & Submit

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

About You
- Name: User, Student
- Email: student1@tdl.org
- Phone: 555-555-5555
- Address: 123 Elm St. University, Texas 77777

Academic Affiliation
- School: Vireo Training Class
- Degree: Ph. D.
- Major: Biology

Document Information
- Title: Biology Dissertation Title
- Degree Date: May 2010
- Degree Type: Dissertation
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.

### List ETDs

<table>
<thead>
<tr>
<th>ID</th>
<th>Student name</th>
<th>Status</th>
<th>Document title</th>
<th>Graduation semester</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Mikeal, Adam</td>
<td>Under Review</td>
<td>test</td>
<td>May 2003</td>
<td>Computer Science</td>
</tr>
<tr>
<td>30</td>
<td>Donohoe, Timothy G.</td>
<td>Under Review</td>
<td>My Thesis</td>
<td>December 2008</td>
<td>electrical</td>
</tr>
<tr>
<td>193</td>
<td>Larrison, Stephanie</td>
<td>Under Review</td>
<td>lions tigers and bears</td>
<td>December 2008</td>
<td>Dance</td>
</tr>
<tr>
<td>253</td>
<td>Texasdilib, Joe</td>
<td>Under Review</td>
<td>Demonstration Dissertation</td>
<td>December 2009</td>
<td>English</td>
</tr>
<tr>
<td>243</td>
<td>User, Student</td>
<td>Under Review</td>
<td>The Best Dissertation Stella has Ever Read</td>
<td>May 2010</td>
<td>Graduate</td>
</tr>
</tbody>
</table>

5 matching records displayed on 1 page
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
Management Interface: Changing the submission status
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)
Configuration Settings: User Preferences

Any administrative user can customize his or her interface to show certain columns, filters, and other information.

**LIST TAB OPTIONS**

### What filter options should appear?

- Assigned To
- Document Type
- Department
- Search Box
- Submission Date (Choose)
- Embargo Type
- UMI Release
- Status
- Submission Date (Range)
- College
- Graduation Semester

### What columns should appear?

- ID
- Assigned to
- Graduation semester
- Major
- Keywords
- Last event
- Student name
- Document title
- Degree name
- Embargo type
- College
- Event time
- Status
- Submission date
- Department
- Document type
- UMI release

### How many records per page should appear?

- 20
- 40
- 60
- 100
- 200
- 400
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
Configuration Settings: E-mail Settings

Administrative “superusers” can determine:

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

**EMAIL OPTIONS**

Choose email options:

- Make administrative staff email address available to students.
- CC the student's advisor as soon as student submits their work.

Which template should be sent to the student upon submittal?
- Use default message
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]
Vireo and the Texas Digital Library

- Vireo was developed by the Texas Digital Library, originally for use by its member organizations.

- 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 January 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.
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.