

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.

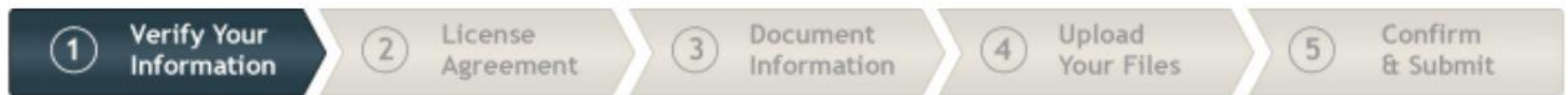
Easy, intuitive online submission of ETDs

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

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

1
Verify Your Information

2
 License Agreement

3
 Document Information

4
 Upload Your Files

5
 Confirm & Submit


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

Middle Initial: 

*** Last Name:** Doe


Suffix: 


*** Email:** jane.doe@school.edu

Year of Birth: 

Affiliation

*** School:** State University

*** College:** 

*** Department:** 

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

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

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

System autofills name, e-mail, and school affiliation

Student Submission Step 2: License agreement

1 Verify Your Information

2 License Agreement

3 Document Information

4 Upload Your Files

5 Confirm & Submit

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

1 Verify Your Information

2 License Agreement

3 Document Information

4 Upload Your Files

5 Confirm & Submit

Document Information

In this step you describe your thesis or dissertation. Please make sure that the information entered below matches the information contained in your document.

Document Information

* Title:

* Degree Date: ...choose ...choose 🗨

* Document Type: ...choose

* Abstract:

* Keywords:

Keyword 1; Key Phrase One; Keyword 2; Key Phrase Two

For the degree date, enter the semester in which your degree will be conferred (typically your graduation semester).

You can use Unicode characters (like accents and diacritics) in these fields.

You can enter multiple keywords. Use semi-colons (;) to separate the entries.

Enter the names of each member of your committee, and use the checkboxes to indicate which one is the committee chair (check two if you have co-chairs).

Your Committee

Introduction to Vireo

- Document information
- Committee & chair information
- Release options (embargoes, publication to UMI)

Student Submission Step 4: Upload Your Files

1 Verify Your Information

2 License Agreement

3 Document Information

4 Upload Your Files

5 Confirm & Submit

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:

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.

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.

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

1 Verify Your Information 2 License Agreement 3 Document Information 4 Upload Your Files 5 Confirm & Submit

Comfirm & 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



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

Student Submission: Submittal Complete

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

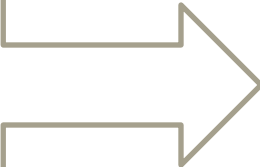
ETD MANAGEMENT

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



Now Filtering By: [-]

Filter Options [-]

MANAGE FILTERS

Clear current filter
Save or edit filters

SAVED FILTERS

New submissions (require assignment)
Students in progress

Filter Further By: [-]

SEARCH BOX

STATUS

Active
Archived

ASSIGNED TO

Unassigned
Courtney Grimland
OMG!
Sam Khosh-khui
jc
Jill Kleister
more...

GRADUATION SEMESTER

December 2010
May 2010
December 2009
August 2009
May 2009
more...

List ETDs

ID	Student name	Status	Document title	Graduation semester	Doc
5	Grimland, Courtney g.	Published	I don't know	May 2009	Ja Er
13	Canales, JoAnn	Published	English Language Proficiency Assessment	May 2008	Te Ec
16	Kleister, Jill S.	Needs Correction	SELF-ESTEEM AND LIFE SATISFACTION OF AGED INDIVIDUALS WITH	May 2007	Bi LI
8	Khosh-khui, Sam A.	Approved	Table Look-up CORDIC	May 2008	Al T>
21	Maslov, Alexey K.	Needs Correction	A master's thesis, edited	December 2008	Ec
20	Mikeal, Adam	Under Review	test	May 2008	Cc Sc
23	Khosh-khui, Sam A.	Cancelled	History of Texas State University	August 2008	Hi
24	Rentz, Paivi H.	Submitted	Test Document	August 2008	Ps
25	Rentz, Paivi H.	Needs Correction	My dissertation	August 2008	Ec
27	Mikeal, Adam	Submitted	test	May 2008	Cc Sc
28	Donohue, Timothy G.	Needs Correction	Test Theses	August 2008	Cc Sc
29	Donohue, Tim G.	Waiting On Requirements	My New Dissertation	December 2008	Cc Sc
30	Donohue, Timothy G.	Under Review	My Thesis	December 2008	as
74	Brunder, Donald G.	Needs Correction	My thesis	December 2008	Ac Cc
193	Larrison, Stephanie	Under Review	lions tigers and bears	December 2008	Da
198	Professor, Paula	Submitted	Title	May 2009	Er
253	Texasdiglib, Joe	Under Review	Demonstration Dissertation	December 2009	Er

January 2010

Introduction to Vireo

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Management Interface: Filtered list

This list shows only active submissions that are currently under review.

Now Filtering By: [-]

STATUS

- Active
- Under Review

Filter Options [-]

MANAGE FILTERS

Clear current filter
Save or edit filters

SAVED FILTERS

New submissions (require assignment)
Students in progress

List ETDs

ID	Student name	Status	Document title	Graduation semester	Department
20	Mikeal, Adam	Under Review	test	May 2008	Computer Science
30	Donohue, Timothy G.	Under Review	My Thesis	December 2008	asd
193	Larrison, Stephanie	Under Review	lions tigers and bears	December 2008	Dance
253	Texasdiglib, Joe	Under Review	Demonstration Dissertation	December 2009	English
243	User, Student	Under Review	The Best Dissertation Stella has Ever Read	May 2010	Graduate


5 matching records displayed on 1 page

Management Interface: Student record

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

Active Document [-]


3737_001[1].pdf
Download

FILE OPTIONS

View All Files
Upload New File

Submission Status [-]

Under Review

Assigned To:
Angusyoung

Last Action:
12 Nov 2009; 1:38 PM

What:
Status Changed

Embargo:
Patent Hold

Custom Actions [-]

Survey of earned doctorates

Received UMI payment.

User, Student (Business - Ph. D.)

Personal Info
Document Info
Degree Info

First Name: Student	Permanent Phone: 512-555-1234
Middle Initial: none	Permanent Email: none
Last Name: User	Permanent Address: There here, TX 12345
Suffix: none	Current Phone: none
Email: student5@tdl.org	Current Address: none
Year of Birth: none	

ACTION LOG

Action by	Action/Comment	Time
Angusyoung	Submission status changed to Under Review by Student User	12 Nov 2009; 1:38 PM
Angusyoung	Note file '3737_001[1].pdf' added by Student User: 3737_001[1].pdf (0.13MB)	12 Nov 2009; 1:38 PM
Angusyoung	Submission assigned to Student User by Student User.	12 Nov 2009; 1:37 PM
Angusyoung	Email to student failed: Invalid Addresses	12 Nov 2009; 10:35 AM
Angusyoung	Initial submission on Thu Nov 12 10:35:30 CST 2009 by Student User	12 Nov 2009; 10:35 AM
Angusyoung	Submission status changed to Submitted by Student User	12 Nov 2009; 10:35 AM
Angusyoung	Primary file '3737_001[1].pdf' added by Student User: 3737_001[1].pdf (0.13MB)	12 Nov 2009; 10:34 AM

[Add Comment](#)

ALL FILES

Name	File	Type	Time
Angusyoung	3737_001[1].pdf (0.13MB)	Notes / feedback	12 Nov 2009; 1:38 PM
Angusyoung	3737_001[1].pdf (0.13MB)	Primary document	12 Nov 2009; 10:34 AM

[Add File](#)

Management Interface: Changing the submission status

Active Document

3737_001[1].pdf
Download

FILE OPTIONS

View All Files
Upload New File

Submission Status

Under Review

Assigned To:
Angusyoung

Last Action:
12 Nov 2009; 1:38 PM

What:
Status Changed

Embargo:
Patent Hold

Custom Actions

Survey of earned doctorates

Received UMI payment.

User, Student (Business - Ph. D.)

Personal Info | Document Info | Degree Info

First Name: [redacted]
Middle Initial: [redacted]
Last Name: [redacted]
S: [redacted]
Year of Birth: [redacted]

2345

009; 1:38 PM
009; 1:38 PM
009; 1:37 PM
009; 10:35 AM
009; 10:35 AM
009; 10:35 AM
009; 10:34 AM

Update Submission close or Esc Key

Needs Correction

Waiting On Requirements

Approved

Advanced Options

Other status:

[Cancel this submission](#)

Cancel **Submit**

ACTION LOG

Action by
Angusyoung
Angusyoung
Angusyoung
Angusyoung
Angusyoung
Angusyoung
Angusyoung
Angusyoung

ALL FILES

Name	File	Type	Time
Angusyoung	3737_001[1].pdf (0.13MB)	Notes / feedback	12 Nov 2009; 1:38 PM
Angusyoung	3737_001[1].pdf (0.13MB)	Primary document	12 Nov 2009; 10:34 AM

Add File

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

LIST TAB OPTIONS

What filter options should appear?

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> Assigned To | <input checked="" type="checkbox"/> Submission Date (Choose) | <input checked="" type="checkbox"/> Submission Date (Range) |
| <input checked="" type="checkbox"/> Document Type | <input checked="" type="checkbox"/> Embargo Type | <input checked="" type="checkbox"/> College |
| <input checked="" type="checkbox"/> Department | <input checked="" type="checkbox"/> UMI Release | <input checked="" type="checkbox"/> Graduation Semester |
| <input checked="" type="checkbox"/> Search Box | <input checked="" type="checkbox"/> Status | |

What columns should appear?

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> ID | <input checked="" type="checkbox"/> Student name | <input checked="" type="checkbox"/> Status |
| <input type="checkbox"/> Assigned to | <input checked="" type="checkbox"/> Document title | <input checked="" type="checkbox"/> Submission date |
| <input checked="" type="checkbox"/> Graduation semester | <input type="checkbox"/> Degree name | <input type="checkbox"/> Department |
| <input checked="" type="checkbox"/> Major | <input checked="" type="checkbox"/> Embargo type | <input type="checkbox"/> Document type |
| <input type="checkbox"/> Keywords | <input type="checkbox"/> College | <input type="checkbox"/> UMI release |
| <input checked="" type="checkbox"/> Last event | <input type="checkbox"/> Event time | |

How many records per page should appear?

- 20
 40
 60
 100
 200
 400

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

Configuration Settings: Application Settings

SUBMISSION AVAILABILITY

Submissions are currently:
Click to close

Current submission semester:
'Month Year' (i.e. May 2006)

Allow multiple submissions:
Click to stop allowing multiple submissions

Request "College" parameter:
Click to stop requesting

Offer UMI release option:
Click to stop offering

SUBMISSION INSTRUCTIONS

Please confirm all of the information on this page before clicking submit.

After you click submit, an advisor within the Graduate School will review your thesis and contact you if any corrections are needed.

In addition to submitting your thesis through this system, you also need to take the following steps in order to receive your degree:

- 1) Obtain signatures of the dean and your committe advisors and return signature sheet to the office of graduate studies

These instructions will be shown as part of the submission confirmation. The following HTML tags are allowed: h1 - h5, p, a, b, i, u, ol, li, img. Newlines are converted to paragraphs automatically.

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

User Preferences Application Settings **Email Settings** Configurable Settings

EMAIL OPTIONS

Choose email options:

<input type="checkbox"/> Make administrative staff email address available to students.	<input checked="" type="checkbox"/> 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
Which template should be sent to the student's advisor?: Use default message		

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]

[\[ADD NEW\]](#)

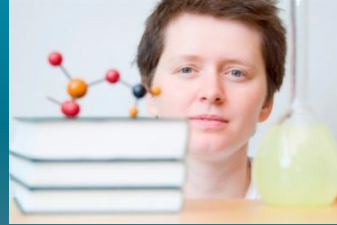
AVAILABLE GRADUATION MONTHS

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

[\[ADD NEW\]](#)

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.

