

Vireo Electronic Thesis and Dissertation Management System

Vireo is the Electronic Thesis and Dissertation (ETD) Submission and Management System from the Texas Digital Library. Vireo allows students to easily submit their theses and dissertations online and provides expert management software for graduate offices and libraries to move the ETD through the approval workflow and publish it in an institutional repository.

All source code, documentation, and training materials related to Vireo are publicly available under an open-source license.

Online Student Submission

Vireo provides a simple and intuitive interface through which students can submit their theses and dissertations online.

The submission interface features:

- An easy five-step process.
- Autofill capability for personal information to reduce typos.
- Embargo options for any document.
- Ability to send ETDs to UMI Dissertation Publishing.

Workflow management for graduate schools and libraries

Vireo's expert interface lets graduate school staff and librarians shepherd theses and dissertations through the ETD workflow, from submission to approval to publication in an institutional repository.

Additionally, TDL has developed a set of metadata guidelines for ETDs that allows members to share metadata with the Texas ETD Repository (see following section).

The workflow management interface provides useful tools for:

- Tracking and managing the manuscript review process.
- Creating flexible workflows using customizable filters.
- Exporting documents and metadata.
- Managing communications with all participants, including students, faculty advisors, and staff.
- Publishing ETDs to the institutional repository.

Vireo Deployment Checklist

Deploying Vireo requires the involvement of many different constituencies within an institution, including students and faculty, graduate school staff, librarians, and technical staff. Institutions planning to deploy Vireo should allow ample time to set policy, undergo training, plan communications strategy, and develop a plan for pilot testing the software.

The list below is not a comprehensive list of necessary steps but does provide some guidance on issues that need to be addressed when implementing Vireo.

First Steps

- ✓ Identify project lead and major stakeholders from library, thesis office, and IT services.
- ✓ Schedule a Vireo demo and understand the Vireo workflow.
- ✓ Understand technical requirements for integrating Vireo with ID management (i.e. Shibboleth). (See <http://www.tdl.org/about-tdl/projects/shibboleth/>.)
- ✓ Understand Vireo's ETD metadata standard. (See <http://www.tdl.org/files/tdl-descriptive-metadata-guidelines-for-etd-v1.pdf>.)
- ✓ Schedule relevant grad school and library staff for TDL Vireo training.
- ✓ Begin working in Vireo training installation. (<https://training-etd.tdl.org/>
Login: tdl.student1@gmail.com / tdlstudent)
- ✓ Determine deadlines for pilot testing and full implementation.

Policy & Workflow Planning

- ✓ Determine embargo types and duration. (See https://wikis.tdl.org/tdl/Editing_embargo_types_in_Vireo_1.8)
- ✓ Determine naming conventions for colleges, departments, and graduate schools. (See https://wikis.tdl.org/tdl/Vireo_Settings#Configurable_Settings.)
- ✓ Define workflows for grad school staff, catalogers, librarians, faculty, and students.
- ✓ Determine library workflow for cataloging ETD records and making changes to metadata within ETD records published in the IR.
- ✓ Determine Vireo Manager(s) -- users with special privileges for configuring Vireo (See https://wikis.tdl.org/tdl/Vireo_Roles)
- ✓ Determine UMI/ProQuest workflow.

Communications planning

- ✓ Plan changes to graduate catalog and website, etc.
- ✓ Plan communication with college and department staff regarding new policies and procedures.
- ✓ Create materials for instructing students and faculty on using Vireo and other elements of your ETD program (embargoes, ProQuest options, etc.)

Testing & Implementation

- ✓ Use Vireo training instance to test policy and workflow decisions.
- ✓ Integrate Vireo with ID management and authentication software (Shibboleth).
- ✓ Create Vireo settings, email templates, and saved filters
- ✓ Configure destination repository for published ETDs. (More information at https://wikis.tdl.org/tdl/Multiple_Deposit_Locations_in_Vireo_1.8.)
- ✓ Undertake pilot testing of Vireo with limited group of students.
- ✓ Launch communications initiatives.
- ✓ Provide ongoing training for all users.
- ✓ Prepare for TDL harvesting of ETDs to federated repository.

User Documentation

- Full documentation for Vireo 1.2: https://wikis.tdl.org/tdl/Vireo/User_Documentation
- *New features and changes in Vireo 1.8:* https://wikis.tdl.org/tdl/Vireo_1.8

Other Vireo Resources

- Vireo Users Group – <http://vireoetd.org/>
- Texas ETD Association – <http://txetda.wordpress.com>
- TDL training – <http://www.tdl.org/training>
- TDL Helpdesk—support@tdl.org OR <http://www.tdl.org/support/helpdesk/>