

Vireo Workflow for Students and Electronic Theses and Dissertations (ETD) Coordinators

[Vireo](https://uh-etd.tdl.org) (<https://uh-etd.tdl.org>) is the system used by UH graduate and professional students, ETD Coordinators, the Graduate School, and the UH Libraries to manage the submission, approval, and addition of ETDs to the Libraries' digital collections. This entire workflow takes place in Vireo.

The Graduate School maintains policies relating to ETDs here:

<https://publications.uh.edu/content.php?catoid=37&navoid=13406>

The Graduate School also publishes instructions for students uploading their ETD to Vireo here:

<http://www.uh.edu/graduate-school/academics/thesis/index.php>

ETD submission due dates are universal across every college: **Students must upload their ETD to Vireo by the day grades are due for their graduating semester.**

When using Vireo, please choose Firefox or Chrome as your browser.

Instructions for Student Upload to Vireo:

1. Student goes to the Vireo website: <https://uh-etd.tdl.org/>
2. Student clicks "Login" button and enters their CougarNet ID and password
 - *Student must contact University IT if their ID is lost, suspended, never previously used, etc.*
3. Student selects the "Start your submission" button in the middle of the screen
4. Student selects the "Start University of Houston Submission" button in the middle of the screen
5. Student proceeds through five steps:
 1. **Verify Your Information:** Please manually enter your personal and affiliation information in the fields provided.
 2. **License Agreement:** Student must select checkbox and hit Save and Continue.
 3. **Document Information:** Student enters document information, the committee chair's name and contact email, names of non-chairing committee members, and decides on an embargo option.
 - *Note: Embargoes expire two years from the date of submission. The UH and ProQuest embargo choices should match. Faculty must approve both embargo preferences.*
 4. **Upload Your Files:** Student uploads the final, approved PDF of their manuscript (Manuscript in PDF), Acrobat Pro generated accessibility report (Administrative

- Files), and may submit supplementary files (Supplemental Files). *Student must click the dark moderate cyan “upload” button for the file to upload to Vireo.*
5. **Confirm and Submit:** Student reviews the information they have generated and can edit any information to correct errors. Once finished, they select the “Confirm & Submit” button.
 - **Note: Student MUST select “Confirm & Submit” to successfully submit their ETD to the university.**
 6. After hitting the “Confirm & Submit” button, the student has successfully submitted their document and they have completed their part of this process.
 - **Note: Student will receive an automated email confirming their submission. The faculty member receives an email informing them that they have to approve the submission. See “Electronic Thesis Submission: The Faculty View” handout for details on the faculty workflow.**
 - **Starting a submission in Vireo creates a record with an “in progress” status. The status of this record changes to “submitted” once the student hits “Confirm & Submit”**

Instructions for ETD College Coordinators (CC) Approval Process:

1. CC goes to the Vireo website: <https://uh-etd.tdl.org/>
2. CC selects Login in link in the upper right-hand portion of the screen
3. CC enters their CougarNet ID and password
4. After logging in, the CC selects “List” from the “Admin Actions” dropdown menu under their name in the upper-right corner of the screen.
5. CC filters list by their own name by selecting their name in the “Assigned To” module. This will isolate only the ETD records that have been assigned to them by the UH Graduate School.
 - *Note: if the ETD(s) are not visible to the CC, please contact the UH Graduate School for assistance in getting those ETD(s) assigned to the appropriate CC.*
6. Once the CC identifies the record they wish to approve, they follow a three-step process to check the quality of that submission. The CC must confirm that the student has the correct information in the following areas:
 1. **Verify data in the Personal Information tab**
 - *Please verify the personal information and degree details, ensuring the data in the Vireo matches exactly the information printed in the PDF file.*
 2. **Verify data in the Document Information tab**
 - *Please verify the document information (title, abstract, keywords, etc.), the committee chair and members, and embargo information, ensuring that the data in Vireo fields matches exactly the information printed in the PDF file.*
 3. **Ensure that the ETD Committee Chair has approved the document and the embargo. CC can verify Committee Chair approval by checking the record’s Action**

Log, where approved records will contain a line item stating, “Committee approval of submission set”. CC will follow up with Committee Chair if/when they have not yet submitted their approval form for the ETD under review.

If changes are made, CC should add a comment to the Action Log so there is a historical record of actions taken to the ETD. To add a comment:

1. *CC selects Add Comment button in the Action Log portion of the screen*
 2. *CC creates a Subject*
 3. *Briefly types a description of the change that is needed or that has been made*
 4. *Leave Chooses a Message Template... selected*
 5. *Select that the comment be made public*
 6. *If needed, select that the comment be emailed to the student or the advisor*
 7. *Check box if the submission needs a correction*
 8. *Select Comment*
7. **Once the submission has been reviewed and no errors exist, the CC changes the status of the document to Approved and then to Pending Publication:**
1. Select blue Submitted Button
 2. Select Approved from dropdown menu
 3. Select Save
 4. Select blue Approved Button
 5. Select Pending Publication from the dropdown menu
 6. Select Save
8. Once the item has been designated as Pending Publication, it is now ready to be received by UH Libraries and cataloged. This concludes the CC work with the item.

Note: Filters are customizable in Vireo. It may be helpful for CCs to filter by their College and/or by Graduation Semester. If so, click on “customize filter” and drag “college” option into the lefthand column and click “Save.”