VUG Steering Committee Meeting -- January 24, 2018

Present: Stephanie Larrison, Billie Peterson-Lugo, Chris Starcher, David Reynolds, and Kristi Park

**Next Meeting**:

Agenda

* Vireo 4 Deployment/Testing Discussion
  + Update on the latest sprint
    - Stephanie spent all day yesterday testing the A&M version and it never crashed, hung a few times, but never crashed
    - Nick is installing that version at TDL
  + Discussion on whether or not to perform beta testing in February
    - No longer crashing
    - More filters available -- submission type (thesis, dissertation, capstone, etc.); filters are saving (same as Vireo 3); Johns Hopkins uses multiple filters all the time and not having enough filters would be problematic; all the statuses (system level) are in place; JHU uses: embargo type, school/college/department (now controlled vocabularies and developers haven’t identified how to create the filter, but will complete it eventually), use filters to run reports, e.g. publication report; for day-to-day activities the current filters would be acceptable;
    - Can’t select a date (bug to tell people about/the way it works; A&M working on it today)
    - Multiple submissions for a single degree not allowed -- has a work around, create a “hidden” workflow, that is turned on when needed and then turned off again; probably something that needs to be fixed? Maybe there aren’t that many cases when you need a multiple submission; if workflows were set up by semester and the submissions were done in different semesters, this would not be an issue
    - Child workflows do work; Stephanie misunderstood how they function;
    - There is some functionality in Vireo 3 that no one is using, so in beta testing people can say, these are the filters we use; any others maybe we do and maybe we don’t
    - As long as we have a similar chance to beta test again once more functionality is built out (David); as long as we have something that will allow people to provide useful feedback to the developers, it’s worth doing the beta testing; the testing will give the developers priorities/expectations for what needs to be done next;
    - What if the TDL deployment of the current version continues to crash; will it be fixable; let’s see where we are at the end of the day; will Nick be available to make sure it’s not crashing, yes, he will; this is his priority right now, making sure we have a stable instance installed; many of the problems have come from running it in a development environment (Springboot) vs. a production environment; worse case scenario, we could run the testing on the A&M site, according to James;
    - Kristi can also spend some time today “banging” on the test instance, along with Stephanie
    - David needs to bang on it before February; **Action Item: Stephanie will set him up as an administrator and send him an e-mail with the link and other information**; Here’s the test instance: <https://test-etd.tdl.org/>
  + Communicate specifically to beta testers
    - Communicate decision to beta testers after this meeting
    - Tentatively scheduled orientation webinar for 1:00-2:30 CST on February 12
  + Ultimately needs to be a discussion between TDL and the developers on communicating about how to set up Vireo 4 -- **Action Item: Kristi will contact James about this issue and let us know what they settle on**;
  + Screenshot of beta set up <https://docs.google.com/document/d/19tLMv_I-CCQdT79QQhkB1zkbaLNJaOyK6BeuPk8O9ZE/edit?usp=sharing>
    - Campus level -- each institution that is testing
    - Degree will be pre-populated for each institution
    - Institutions will be able to create child levels
    - Ask them to stay away from the “Settings” tab, but perhaps have those who are already at the Administrator level in Vireo 3 experiment with this section; add but don’t delete;
    - Everyone doing the testing will have both the staff and student roles
  + Work to be done before we’re ready for testing
    - Test Instance: <https://test-etd.tdl.org/>
    - develop a “script” to use when showing people Vireo 4
    - provide step-by-step instructions we want people to use in performing functions, the functions people will use the most
    - provide “boundaries” on what they can do to avoid messing up the work of others
    - Complete the checklist/rubric document
    - try the system out as you would use it
    - set up a webinar for the testers -- **Action Item: Kristi will set up this webinar in Blue Jeans and send the information to Billie**
      * Logistics - Does Blue Jeans have chat? If so, Steph needs someone to monitor; Kristi will monitor the chat
      * Practice Session with Billie and David -- **Date: February 6 at 1:30 pm (CST)**
    - need to get SWORD setup for testing; Nick knows that is part of what needs to be done for providing a testing environment;
    - Verify e-mail functionality; Kristi will check to see if that will be available;
      * This is working. SL did not have it turned on.
  + Long term, will TDL support both Vireo 3 and Vireo 4
    - Kristi -- has given this issue some thought and has decided to wait until the beta testing is done
    - May keep Vireo 3 running for a short period of time, but for the long term, it’s not viable to run both versions
    - Feeding into this decision would be the Bibliolab development/partnership
* Bibliolab Discussion
  + Meeting set for January 30, 1:00-3:00 (?), Perry-Castaneda Library, Room 1.340
  + Online: <https://bluejeans.com/159931116>
  + Discuss the agenda: <https://docs.google.com/document/d/1qg-gCrt72Bnqc0RisxSOoI1O1IftUBQRhkr6gHfezDI/edit>
  + Discuss the length of the meeting
  + Kristi’s notes from her meeting with Bibliolab
    - I talked with Mitchell Davis yesterday afternoon and we’d like to move forward with the January 30 meeting if everyone here is still amenable. I’ll send out an email to the larger group that includes the Bibliolabs folks today to set a time and begin drafting an agenda. They are meeting with some other UT Libraries people that day, in the morning, so we’ll schedule our meeting for 1pm.
    - I think that the potential presented by the partnership is good for TDL and for Vireo, and think we ought to explore it further as a group. Devil’s in the details, of course. Below I’ve summarized some of the thoughts/concerns I shared with Mitchell about their proposal and some other notes from our conversation.
    - TDL is open to providing temporary funding for Vireo software development at Bibliolabs (pending budget review and board approval), but not for bus dev activities. We agreed that those activities could be bootstrapped and/or folded in to Bibliolabs regular work in that area.
      * Kristi -- hire someone at TDL to do the development; Bibliolab has someone in mind for this development, and TDL has had trouble hiring someone who can devote time to Vireo development; danger is some loss of control over the Vireo development; want to make sure that VUG, TDL, etc. continue to have a significant voice in the development process
      * If TDL is unable to fund a position, they most likely will go elsewhere for the position (EBSCO); TDL needs to have some skin in the game;
      * Main reason they wanted to do development was to support multi-tenancy; have TDL pay for development that won’t necessarily benefit TDL or TDL Vireo users?
      * The trick is to make sure this development benefits the entire Vireo community and not just the needs of Bibliolab/EBSCO
      * One potential benefit, whatever the TDL cloud looks like in the future is that TDL becomes part of that cloud and TDL Vireo instances becomes part of that cloud or TDL has their own Vireo cloud instance;
      * Individual institutions probably aren’t going to have the funds to pay for this system
      * Part of the value would be migrating the current instances of Vireo to a multi-tenant Vireo environment
    - TDL is open to the arrangement expressed in the proposal for TDL to receive a percentage of any hosting business done by Bibliolabs but would request a minimum flat payment to ensure that we’re recouping some of our investment.
    - We want any partnership to recognize the central importance of the VUG and its role in guiding development, and we want to ensure that there’s a shared commitment to an open process and open documentation. We also want to ensure that we’re building a collaboration that doesn’t end up putting us in competition for Vireo hosting business.
      * If OhioLink picks up Vireo, that group could overwhelm the current VUG;
      * How would the incorporation of code developed in this process be incorporated into the open source environment; VUG vote; TDL’s capabilities;
      * What is the future of the VUG steering committee, especially if there are more people on the hosted site, as opposed to the open source version; need to dig into these questions next week; waht is the VUG and how do we incorporate Bibliolab into the VUG; gather developers who want to work on it; design/propose something to the VUG for feedback; idea boards/enhancement requests to guide future development;
      * Do the VUG by-laws need to be revised; do we need to think about a rotation of the VUG Steering committee; an opportunity to think about these; Kristi doesn’t want TDL making the decisions without some body helping to make those decisions;
    - Mitchell has met with EBSCO about the possibility of a partnership – either with EBSCO providing the software dev/bus dev funding for future Vireo development, or alternately with EBSCO serving as a hosting service somewhere down the road. [This is the area of biggest potential and biggest concern from my perspective, and something about which we as a steering committee need to have additional conversations, I think.]
      * Bibliolab will most likely go forward with this process with or without TDL, better to be involved than not involved
      * Vireo needs to remain neutral
    - Here’s a link to the press release about the Open Dissertation collaboration: <https://www.ebsco.com/news-center/press-releases/ebsco-information-services-opendissertations.org-project>
    - We agreed that, if we move forward after January 30, we would like to set the Charleston Conference next fall as a goal for announcing something about a partnership between Bibliolabs, TDL, and the VUG.
      * This timeline gives us (TDL and Bibliolabs) time to work through this process thoughtfully
    - I think there’s potential for finding additional funding within the open source (ie non-TDL) Vireo community and we could pursue that together. Bibliolabs can help with Vireo 4 cleanup work after the beta testing.
    - Overall, I found our conversation encouraging, though there’s much to be discussed – particularly about a potential role for EBSCO. My general impression is that they’re going to move forward with some strategy for developing a Vireo cloud, so it is in our best interest to be invested. My other impression, which I think others here share, is that Bibliolabs is an honest broker with good intentions, and that we could have a fruitful partnership.
* Checklist/rubric -- David
  + Test instance: <https://test-etd.tdl.org/>
  + Instead of rubric, have each person do what they normally do at their institution
    - Submission as student
    - Perform a review
    - Perform regular functions
    - With controlled vocabularies (only changed by admins), for example, there are different ways that they work, so there needs to be some instruction
  + Partial draft of rubric here: <https://docs.google.com/spreadsheets/d/1YPR2AzZ9pQyzqucETVdpyXbB_UEd3-5WBE8KlGRAtOY/edit#gid=123279912>
  + Flesh out broader strokes and not provide too many details
  + Everything is dependent on the workflow that is created;
  + suggest that student upload is tested first;
  + set up a list of departments, degrees, etc.; on the administrative side ask them to upload or modify existing data;
  + Will need to provide some parameters;