VUG Steering Committee Meeting -- February 6, 2018

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

**Next Meeting**:

Agenda

* Vireo 4 Deployment/Testing Discussion (test instance: <https://test-etd.tdl.org/>)
	+ Here’s the test instance: <https://test-etd.tdl.org/>
	+ Communication between TDL and Vireo developers at A&M about transferring Vireo backlog from Jira to GitHub, making it more openly accessible by others
		- **Action Item -- Stephanie** will continue to trim the backlog to the valid content
		- Kristi needs to follow up with James about that process
		- Need to think about the feedback from the testing -- will it be added to the list of issues? Yes, if Stephanie can duplicate the issue, she would add it to the list of issues; add new issues to GitHub and deal with adding the other issues to GitHub later; **Action Item -- Kristi** will look at it and work with Nick to set up the issues site in GitHub
	+ 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
		- 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
		- Need to get SWORD setup for testing; Nick knows that is part of what needs to be done for providing a testing environment;
	+ 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
* February 12 Webinar and Testing Details
	+ Webinar
		- The site is up from 7:30 am - 6:30 pm CST, Monday - Friday; need to make sure this information is provided to the testers during the webinar;
		- If Vireo crashes during testing, send a message to TDL Support and note on the spreadsheet what they were doing at the time
		- If an issue is in the script, it’s already logged to be fixed, so the testers don’t need to submit it again
		- Another tab in the spreadsheet that lists the identified bugs as they come across them; most important thing is to let people know what actions cause a crash
		- Provide a link to the spreadsheet that captures the issues that are submitted -- Kristi will identify that link and send it out after the webinar
		- For specific items, indicate that we’ll send out a follow-up message to recruit volunteers to look at them near the end of the testing period, but doesn’t have to be everyone;
		- After the webinar, send a follow-up message with basic “need to know” information and link to the webinar
		- **Action Item -- Kristi** needs to make sure that Bibliolabs is notified about the webinar
	+ Testing -- **February 12 - March 4**
		- The spreadsheet items that specifically have a link to the feedback form are actions for which we really want/need feedback;
		- When a serious issue arises with Vireo (crashing), we’ll need to send an e-mail message to the group; with multiple people in the system at the same time, it may be difficult to identify what action caused it to crash;
		- Some benefit to “load testing”; the logs are pretty detailed so we should be able to figure out where the problem is; knowing the time is important, which should be obvious from when the log stops recording information
		- Further on down the road, will we need to do some more robust load testing, with 20 or 50 people using it -- whatever is normal for an institution's environment
		- Do we need to know when people are testing?
		- Leave the testing spreadsheet so it can be read, but not edited;
		- James wants to be kept aware when the testing takes place;
		- For those (like Monika) who want to install Vireo, how do we provide support to them if they have trouble with/questions about the installation; by using the Slack Vireo channel, it brings James into the loop, helps him see what improvements need to be made in the documentation; Kristi will set up a separate Slack channel for the Vireo installation testers; we need to identify them so Kristi can send them an invitation to the Slack channel.
		- Have a few things that need to be tested by the administrators; send an e-mail message indicating that there will be some changes that will impact people; and a separate e-mail to the administrators who will do additional testing
		- **Action Item -- Kristi**: Name/contact information of person(s) from Bibliolab who will be testing Vireo 4
* Update from January 30 Meeting with Bibliolab
	+ As long as Bibliolab’s and TDL’s goals are aligned, it could be a really good partnership
	+ Eric Harknett, group community lead for CORAL; open to discussing with us how they work with private entities/corporations;
	+ Need to have a structure in place to ensure that the vision proposed for multi-tenancy application is supported and works for the community;
	+ Getting issues set up in GitHub
	+ They want to participate in the VUG community; should be encouraged and VUG steering Committee can figure out how to make that productive and financial partnership with Bibliolabs and TDL, which is a separate conversation that Kristi will continue to have with Mitchell, et. al. about that partnership;
	+ TDL will want to know as much detail about any features they want to do and how they want to do it up front in order to prevent (for example) financial support being provided for a project (multi-tenancy) and the project is not completed in the specified time frame, but the money has been spent; develop a document that provides a framework demonstrating the agreed-upon terms and actions; if TDL is putting money into it, it needs to beneficial to TDL;
	+ Bibliolab’s vision is a hosted Vireo instance that everyone will want to join, and we’re not sure that is what would really happen; added functionality for those who want to use it;
	+ Kristi’s understanding is that any funding of a person for future development of Vireo would be for the multi-tenancy development; however Bibliolab indicated they wanted to work on fixing existing issues;
* 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;