Vireo Users Group 2014
April 30, 2014
Perry-Casteñeda Library, University of Texas at Austin

Welcome—Kristi Park

Kristi welcomed attendees and gave some information about logistics for the meeting

Organization—David Reynolds

David explained the mission and organization of the Vireo Users Group (VUG) <http://vireoetd.org/vireo/about/mission-and-organization-of-the-vireo-users-group/> The VUG Steering Committee comprises Stephanie Larrison (co-chair and Product Owner), David Reynolds (co-chair), Joy Perrin, Laura Spradlin, and Ryan Steans.

Introductions—Stephanie Larrison

Stephanie started out a round of introductions of attendees. Each representative was asked to give his or her name, institution, role, and institutional profile highlights about their ETD program and use of Vireo. Following are some of the highlights.

* Texas State University—Stephanie Larrison
	+ On current version 2.05.06
	+ Host own Vireo
	+ 50-75 masters per semester, 20-25 Ph.D. per semester
* Baylor—Billie Peterson Lugo (glue between grad school, cataloging dept., etc.)
	+ hosted at TDL
	+ 130 submissions per semester
	+ starting to use Vireo soon
* Angelo State University—Susan Hawkins
	+ started using Vireo last semester
	+ 15-20 per semester
	+ starting capstones soon
	+ TDL hosted
	+ her duties with Vireo are teaching grad school how to use, etc.
* Tex. A&M – Laura Hammons; Gayle Clement
	+ ETD since 2002; Vireo in 2008, one of the first schools to use it
	+ host their own instance
	+ not many customizations; created new status called “archived”
	+ accept theses and record of study
	+ undergrad office has separate instance of Vireo; students submit chapters in stages—unique way of using Vireo
	+ 1000s of items in Vireo; about 450 per semester
* UT Austin—Ann (?) manages cataloging of theses and Colleen Lyon (repository manager), Renee Babcock in Grad School
	+ Vireo in spring 2009
	+ Dissertations, theses, masters reports
	+ about 850 in spring and 450 in fall and summer (1700 per year)
	+ catalog theses and submit to UT repository
* Johns Hopkins—David Reynolds
	+ Vireo in September 2013
	+ Dissertations, theses, capstones
	+ about 500 submissions per year—mostly dissertations
	+ locally hosted
	+ allows embargoes of up to 4 years
* TAMU International (didn’t get name)
	+ playing with archived PDF of ETD and putting in IR
	+ 1 in Vireo now; now a requirement for graduation
	+ still learning
* Others: Micah Cooper (Texas A&M), Michael Bolton (Texas A&M), Gad Krumholz (TDL)
	+ Marlene Coles—ProQuest ETD evangelist
* Who is missing
	+ Harvard, MIT, Ga. Tech, Illinois-UC, East Carolina is trying, Arkansas
	+ UNT is evaluating
	+ Inquiries from Canada
	+ Another meeting at USETDA in Orlando to reach out to non-Texas schools

By-laws

* By-laws were ratified; no discussion or opposition

Vireo ProQuest documentation

* The export document was just approved by everyone (including ProQuest) last week and posted to the website; will go out to the listserv now
* Questions
	+ Students want to block sales. No way to do that within Vireo. It would have to be arranged directly with ProQuest. PQ says that there is no such thing as a “permanent embargo” feature. Marlene will bring this up. Right now there is only “traditional publishing” option with PQ out of Vireo
	+ You can strip out the PDF and do a separate export, but this may not be o.k. with ProQuest
	+ TAMU and JHU are interested in a separate embargo option for PQ that is different from the institutional embargo. That is, a student should be able to select a 1 year embargo in IR and a permanent embargo at PQ (but still have the metadata available)
	+ Comment: need to clarify the version of Vireo that is necessary to FTP to PQ in the documentation
	+ Comment: expand documentation to clarify what needs to go into embargo codes
	+ Comment: clarify that even if you have two separate licenses (PQ and IR) but not necessarily two separate files. TAMU has both licenses integrated in one file.
	+ Discussion about fair use and PQ. Determination of fair use might be different for publishing in IR than it would with third-party commercial publishers like PQ

ETD Metadata Working Group--Sarah Potvin (Texas A&M)

* TDL-sponsored working group
* responsibilities:
	+ update guidelines produced by the 2008 guidelines
	+ focused on NDLTD guidelines
* need VUG help on use cases—let them know what we are encountering
* timeline: will have first meeting in June; should have some starting documents done by that time. Will work with VUG during process. Will probably take 9 months to 1 year to get work done. Will not affect next Vireo development cycle

TDL-sponsored Software Development

* Looking to reconcile the Vireo code trunk with branches that are developing on various campuses
* Look at integrating fixes that have been submitted to Github
* Try to upgrade the Java Play framework to the current version—at least look at the effect—don’t break the code
	+ not sure whether this upgrade will include new features or will just update the “scaffolding”
	+ you might not have to change Vireo or you might just change your Play instance
* Forming Vireo Technical Developers Group
	+ will be a page where users can submit change requests
	+ will develop project charter
	+ trying to recruit developers from around the country; try to get this nailed down in next 30 days

Voting Process and Timeline

* June 1 will be the deadline for new enhancement requests
* actual development sprint will not happen until August (VUG voting process needs to be done by end of July)
* feature and issue requests go to <https://www.surveymonkey.com/s/SCZ2WXR>
* “Sizing”: the development group gets together and makes an estimate of how difficult an individual enhancement might be. They talk about what each of the scores mean. If VUG has put a lot of high-value things at the top, the Steering Committee may need to re-prioritize the items
* Prioritization will be done by a combination of popularity and size

Customizations Outside the Master Branch

* When someone makes a change in their branch, they can put it on Github as a “pull request” that is asking the change to be pulled into main branch
* Developers Group will review all six current pull requests and report back to VUG. They will pull these into a test version that people can dry.
	+ Steering Committee will evaluate the feedback given by users after the trial period to decide whether it needs more discussion or to just accept as done.
* True bug fixes will not be voted on by VUG, but they will keep us informed.
	+ people want to vote on individual changes, not on a whole package
* If a pull request is voted down by VUG, it can still go on the enhancement list
	+ individual libraries can still feel free to pull these down into their own branch

Feature Requests for Next Ballot

* Should we start with existing list or start over? some found the existing list daunting because it is so big. We might ask everyone for top 3 needs: you can choose from the list or add new ones
* How can we weight the voting process? rank them all? give voters a number of poker chips?
* Possibly use Jira to track and categorize requests? probably too expensive
* do we need more detail on the requests? Steering Committee will ask for examples if things aren’t clear
* \*\*\*\*\*\*DECISION: we will start over. use the URL above to submit new requests. Requires some institutional information.
	+ you can make multiple requests by using multiple screens. Limited to 3 requests; discussion about how to divide this up between institutions and within instutition
	+ Add a “wish list” page for things that don’t make your top 3 submissions
* DECISION: each institution can put in 6 enhancement requests—the institution gets to decide how to divide these up. This only for formulating the ballot. May have a different way to prioritize things once we get the ballot.

Other orgs

* Another VUG meeting at USETDA in September
* Next TxETDa meeting at Baylor