Let’s Talk Vireo

AN OVERVIEW OF VIREO COMMUNITY AND DEVELOPMENT

Stephanie Larrison - Texas State University Library, Chairman of the Vireo Users Group
Ryan Steans - Texas Digital Library, VUG Utility Player
Laura Waugh - Texas Digital Library, New(ish) to TDL
Who is standing up here

Stephanie Larrison
- Electronic Resources Librarian at Texas State University
- Chair of the Vireo User Group since Vireo 2

Ryan Steans
- Assistant Director at Texas Digital Library (home of codebase for Vireo)
- Worked with Vireo since 2009

Laura Waugh
- Marketing Coordinator at Texas Digital Library
- New-ish to Vireo
What We’ll Cover

Welcome
  ◦  Who we are

Vireo Yesterday
  ◦  IMLS grant
  ◦  Developed at Texas A&M
  ◦  Development of the USETDA and TxEHDA
  ◦  Development of the Vireo Users Group
  ◦  Versions 2 and 3
  ◦  ProQuest Integration
  ◦  Email Features
  ◦  Needs Corrections workflow

Vireo Today
  ◦  Open Source Software
  ◦  Community
  ◦  Workflow and Communication Tool
  ◦  Training for version 3 in Austin in March

Vireo Tomorrow
  ◦  Vireo 4
  ◦  TCDL
  ◦  Training for Vireo 4
  ◦  Other Services

Open Discussion
What we’ll do

• We’re here to have a conversation:
  ◦ Ask questions
  ◦ Provide us with what’s happening on your campus
  ◦ Share best practices

• We are not soliciting new feature requests (*at the moment*)

• Not here to take one on the chin
Yesterday
Origins of Vireo

• Development originally funded by an IMLS grant
• TDL Metadata Working Group provided a report in 2005 that provided guidance
• Written as part of the Manakin front-end to DSpace
• Development led by Scott Phillips and Co. at Texas A&M University
• Deployed at Texas A&M in Fall 2008, UT Austin in Spring 2009
• None of these people are still around
Vireo v.1

- Originally envisioned as part of one gigantic TDL DSpace
- Users would log-in using a “Where Are You From?” page & Shibboleth
- By deployment, realized we needed to:
  - Separate Vireo and DSpace
  - Have a DSpace and DSpace + Vireo (transparent to users) per institution
- Issues:
  - Incredibly hard to track issues, as the problem could be in Vireo, DSpace, or some combination
  - Texas A&M-centric in workflow and application
Vireo Released as Open Source, VUG Founded

- In accordance with IMLS grant, Vireo was released as an Open Source software
- TDL made a commitment to “productize” the software
  - Easy to launch
  - Continue development on Vireo
- Vireo Users Group
  - Laura Hammons agreed to start the Vireo Users Group with administrative support from TDL
  - Provided direction during Vireo v.1.x sprints
Vireo v.2

- Separation of Vireo from DSpace - an independent tool
- Play framework with Spring (Java based)
- Some new features were added
- Benefits:
  - Quick to deploy
  - Much easier to uncover and resolve issues (weeks reduced to hours)
  - Early ProQuest integration began here
- Much of the development team left as Vireo 2 was deployed
Vireo v.3

- Completed more than 30 new features
- Some refactoring of code
- Stephanie “The Vireonator” Larrison acted as Chair of the Vireo User Group and Product Owner
- Co-developed by TDL and Texas A&M University
- Current Code Base
- Moved code to GitHub
- Currently at 3.0.3 with patches and bug-fixes
- Did not include two major feature requests as they would require the entire development period (see: Vireo v.4)
Vireo Feature: ProQuest Integration

• I’ll let ProQuest pitch for themselves
• But... ProQuest increases findability and access to the scholarship of our students (which means more citations)
• Integration is not seamless.
  ◦ ProQuest options for student submissions
    ◦ License
    ◦ Embargo
    ◦ Subjects
    ◦ Export and FTP of data to ProQuest
• Cost is free to students
• Please consider your local policy carefully
Vireo Feature: Email Workflows in v.3

• Change of ETD state triggers an email
  ◦ Submitted
  ◦ Corrections Received
  ◦ Approved
  ◦ Pending Publication
  ◦ Published

• Dependent on policy
  ◦ Overall
  ◦ College/Department/Program

• Send to designated rep
  ◦ College/Department/Program
  ◦ Special Administrative Group defined by Vireo Admin
Vireo Feature: Needs Corrections in v.3

• Needs corrections directions now provided in (red) text box
• Clickable link takes students to correct location on Needs Correction page
• Students still not always reading directions
  ◦ Will either upload same doc 25 times before calling helpdesk (never hit “corrections completed”)
  ◦ Or just hit “corrections completed”
• Need to fix UX in v.4
Today
Vireo Open Source

- **Vireo User Group Website** ([http://vireoetd.org/vireo/](http://vireoetd.org/vireo/))
  - Documentation
    - [http://vireoetd.org/vireo/](http://vireoetd.org/vireo/)
  - Links to download software
    - [https://github.com/TexasDigitalLibrary/Vireo/wiki](https://github.com/TexasDigitalLibrary/Vireo/wiki)
  - Tutorials for usage
- Empowers users to run their own/develop their own code
- Code can be contributed back (this includes TDL-hosted versions)
Vireo Open-Source

and more…
Thinking about it:

• Oklahoma State University
• California Digital Library
• http://www.cdlib.org/services/uc3/etd.html
Vireo User Group

• Governance
  ◦ Co-Chairs (Stephanie Larrison and David Reynolds)
  ◦ Board
• Influence on software development
  ◦ Generated more than 40 “stories” for Vireo 3
  ◦ Dozens of people voted
• Community listserv
  ◦ Technical
  ◦ Best practices
• Meetings
  ◦ TCDL
  ◦ As needed
USETDA and TxETDA

• Texas Conference on Digital Libraries 2009, Laura Hammons had a special afternoon session around ETDs
• Angie McCutcheon from OhioLink presented
• Laura and Angie joined with other parties and launched the US ETD Association
  ◦ Annual meetings (Florida, California, Boston, Austin)
  ◦ Share best practices
  ◦ Discuss policy and technology
  ◦ Grapple with changing landscape
• Regional meetings led to TxETDA/USETDA Region III
What Vireo is and is not

• **Vireo is:**
  ◦ a workflow tool to move theses, dissertations, and other scholarly works required for completing a degree from student, to reviewers, to a repository
  ◦ Vireo may actually do that thing you wish it did

• **Vireo is not:**
  ◦ a repository (yes, we back up. No, it is not for permanent storage)
  ◦ an editing suite
  ◦ magic
Vireo 3 Training

• Thursday, March 24th, 9am - 4pm
• Perry Castaneda Library, UT Austin
• Yes, it’s me
• If it’s been awhile, it’s time to get training again
  ◦ Your training may be from several versions back (we’ve added stuff)
  ◦ Check for intended use of Vireo vs. what you’re doing
  ◦ Refresh those neurons
  ◦ Who trained who on Vireo at your office?
  ◦ Vireo may actually do that thing you wish it did

• More information and link to registration: https://tdl.org/classes/
Tomorrow
Vireo Version 4

• **Summer 2016**
• **New Features**
  ◦ Granular workflows
  ◦ Controlled vocabularies via .csv file
• **Public Demos of Software Development**
  ◦ Beginning March 2\textsuperscript{nd} at 2:00pm
• **Product Owner**
  ◦ Stephanie “Vireozilla” Larrison
• **Public Demos of Software Development**
  ◦ Gad Krumholz (Texas Digital Library)
  ◦ Jeremy Huff, Micah Cooper, James Creel, William Welling, Rincy Mathew, Simon Frazier (Texas A&M University)
Texas Conference on Digital Libraries

• Grand unveiling (we hope)
• Presentation in to TCDL committee
• Workshop offering in to TCDL committee
• More Stephanie than you’ll know what to do with
Vireo 4 Training

- Led by Stephanie “VireOmega-3” Larrison
- Crucial for everyone! (Yes, you as well)
  - Date: Thursday, July 21\textsuperscript{st}
  - Time: 9am - 4pm
  - Perry Castaneda Library, UT Austin
- Webinars to follow
- This may largely cover changes to Vireo. We still recommend Vireo 3 training for a full understanding of Vireo.

- More information and link to registration: https://tdl.org/classes/
The World to Come…

- Will not immediately begin another development cycle after Vireo 4 is released
  - Patches/bug fixes
  - We’ve spent tremendous TDL and TAMU resources on Vireo 3 and 4
- Potential features we’ll explore
  - Dataverse integration
  - Publishing to non-DSpace systems
Open Discussion
The World to Come…

• How are your numbers?
• Is Vireo 3 working for you?
• Are you using the filters and reporting features?
• Have you explored the email feature? Let your campus know about it?
• Is there any outreach you’d like to see from TDL/VUG?
• Have you used the listserv from VUG? Is there another communication mode you’d like to see?
• What else?