

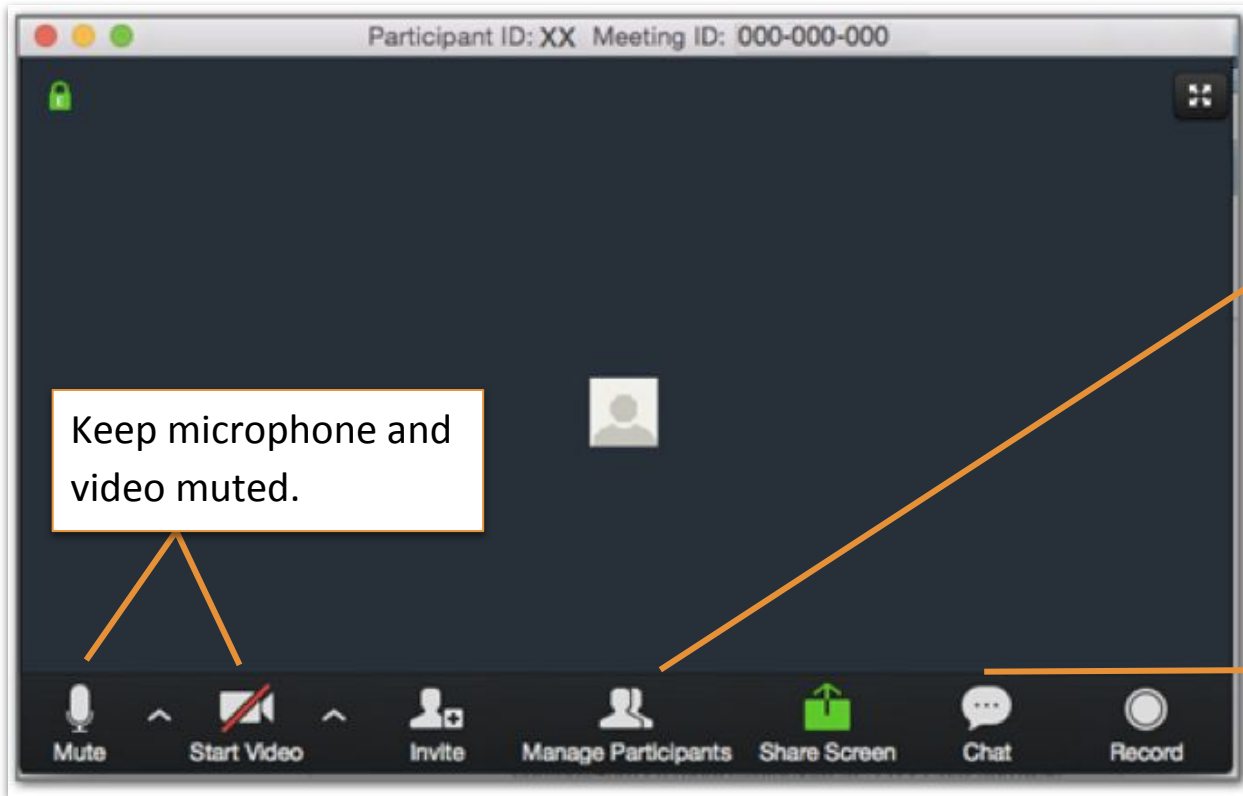


# **TDL-Hosted Vireo 4 Upgrade and Migration Training**

## **July 17, 2020**

Hosted by Courtney C. Mumma, MAS/MLIS, TDL Deputy Director  
Discussion and Q&A with Frank Smutniak, TDL Lead Vireo Developer

# Using Zoom



Keep microphone and video muted.

Click on participants to view attendees.

Click chat to enter questions & comments.

# Agenda

- Welcome and overview of today's agenda
- Upgrade and migration process - discussion
- Changes between Vireo 3 and 4 - video and discussion
- Getting Started in Vireo 4 - demonstration and discussion
- Review of changes and some tips
- Closing Q&A

<https://texasdigitallibrary.atlassian.net//c/u5AB2SKG>

# TDL & Your Hosted

## • **TDL** Vireo

- Home of the Open Source Vireo Project
- Host and maintainer of 14 TDL member instances
- Project manager of the Vireo 4 migrations and upgrades
- **You, TDL member**
  - Vireo administrator and facilitator of submissions at your institution
  - Reporter of bugs and problems with your Vireo instance to the [support@tdl.org](mailto:support@tdl.org) helpdesk
  - Member of the Vireo Open Source Community User Group (VUG) and eligible for VUG Steering Committee membership
  - Contributor of feature requests

# Upgrade & Migration

- Resources (all of these are on today's agenda):
  - Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>
  - Getting Started in Vireo 4 <https://texasdigitallibrary.atlassian.net/l/c/YXCS0wN1>
  - Vireo 4 User Documentation <https://texasdigitallibrary.atlassian.net/l/c/oEvWniyu>
  - Differences Between Vireo 3 and 4 <https://texasdigitallibrary.atlassian.net/l/c/xfUK2dpw>
  - Vireo history & versions  
<https://texasdigitallibrary.atlassian.net/wiki/spaces/VUG/pages/732561434/Vireo+Version+History>

# Timeline

- TDL is upgrading and migrating content to Vireo 4 for its TDL Service members from May 2020 through September 2020
- TDL contacted partner institutions to find the best and worst timing
- Delayed by about 2 mos due to complications from the Pandemic and Shibboleth

# How long will the upgrade and migration take?

- At least one week, though the first several will take longer
- Take as much time as you need to adjust settings and config
- TDL will not eliminate your older Vireo until you're ready

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

tdl.org

# Will there be any down time between our current production version and Vireo 4 production?

- New Vireo 4 in parallel to current production Vireo
- Take as much time as you need to adjust settings and config
- TDL will migrate from older Vireo when you're ready

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>



# What if the migration and configuration cannot be completed in a two week time frame?

- It's ok.
- Use your current Vireo until you're ready to move over to 4
- TDL will work with you to help throughout

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

# Will TDL need to work with Member Institution's IT?

- Setting up Shibboleth
- Permissions and security requirements vary per institution

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

# Will library and graduate school staff have responsibilities during this transition?

- Local setup and configuration using new features
- Update local guidance and procedural documents
- TDL will work with you to help throughout

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

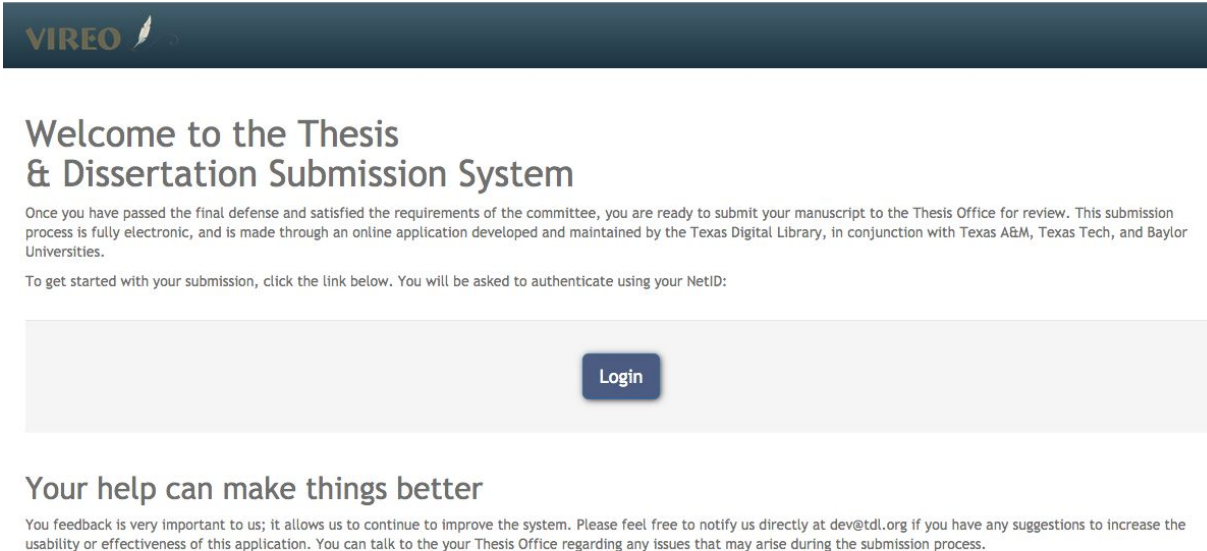
# Will TDL coordinate setting up automated deposit to our hosted DSpace?

- TDL will coordinate and test with you.

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

# Can we experiment with Vireo 4 in advance?

- Sandbox available: <https://test-etd.tdl.org/>

A screenshot of the Vireo 4 login page. At the top left is the VIREO logo. The main heading reads "Welcome to the Thesis & Dissertation Submission System". Below this is a paragraph explaining that users who have passed their final defense can submit manuscripts. A "Login" button is centered in a light gray box. At the bottom, there is a section titled "Your help can make things better" with a link to a feedback page.

**VIREO**

## Welcome to the Thesis & Dissertation Submission System

Once you have passed the final defense and satisfied the requirements of the committee, you are ready to submit your manuscript to the Thesis Office for review. This submission process is fully electronic, and is made through an online application developed and maintained by the Texas Digital Library, in conjunction with Texas A&M, Texas Tech, and Baylor Universities.

To get started with your submission, click the link below. You will be asked to authenticate using your NetID:

[Login](#)

### Your help can make things better

You feedback is very important to us; it allows us to continue to improve the system. Please feel free to notify us directly at [dev@tdl.org](mailto:dev@tdl.org) if you have any suggestions to increase the usability or effectiveness of this application. You can talk to the your Thesis Office regarding any issues that may arise during the submission process.

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

tdl.org

# What gets migrated from Vireo 3 to 4?

- The action log, submissions, and users are migrated.

Vireo 4 Upgrade and Migration FAQs <https://texasdigitallibrary.atlassian.net/l/c/vR1WzSGD>

# Vireo 4 User Documentation

- Vireo 4 User Documentation  
<https://texasdigitallibrary.atlassian.net/l/c/oEvWniyu>

# Changes between Vireo 3 and 4

- Short Video from Vireo User Group meeting last month
  - Video and shared notes are linked from the TDL wiki:  
<https://texasdigitallibrary.atlassian.net/wiki/x/zYBcTw>
- Differences Between Vireo 3 and 4  
<https://texasdigitallibrary.atlassian.net//c/xfUK2dpw>



# Getting Started in Vireo 4

- Getting Started in Vireo 4 Describes:
  - <https://texasdigitallibrary.atlassian.net/wiki/x/EQCCU>
  - Multi-stage process of upgrade and migration
  - System and account setup
  - Institutional settings in the application
  - Migration
  - Post-Migration
- Welcome Jon Crossno, who will walk through that Getting Started process

# Review of Changes and Tips

- Customizable workflows
- Enhanced field control for filtering flagging and tracking
  - Change help menu
  - Change labels but not the metadata keys
- Controlled vocabularies
  - Across almost all fields
  - Upload controlled vocabs and associate with appropriate field
- Never change the Shibboleth settings
- Mapping of user interface differences:  
<https://texasdigitallibrary.atlassian.net//c/xfUK2dpw>

# Questions

[tdl.org](https://tdl.org)

# Contribute

*Vireo is better when we all work together!*



- Join the Vireo User Group
  - <https://utlists.utexas.edu/sympa/info/tdl-vireo>
  - Any Vireo user can ask a question or share a success!
- Offer the developers your feedback
  - On the discussion list: <https://utlists.utexas.edu/sympa/info/tdl-vireo>
  - On Slack - Just ask us via the list to add you to the channel
  - Via Github: <https://github.com/TexasDigitalLibrary/Vireo>
- Participate in a Vireo Community Sprint
  - The next community sprint will be announced via the discussion list.
  - TDL needs technical contributions, documentation creators and editors, and end-user testers during these sprints.

# Thank you

**Texas Digital Library is a consortium of library and archives professionals that propels the Academy forward by maintaining our past and preparing for the future.**

Membership in TDL is open to any academic library. Find out more by visiting <https://www.tdl.org/members/membership/> or email us at [info@tdl.org](mailto:info@tdl.org).

tdl.org