VIREO 3.0

A Growing Partnership in the Service of ETDs

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The Texas Digital Library is a *consortium of libraries* that works together to support *greater access* to the riches of Texas academic institutions...

...including theses and dissertations.
Thesis & Dissertation publishing

• Easy *online submission* for students
• Workflow for managing approvals and *publishing* to repository
• Flexible *embargoes*
• Student maintains *copyright*
• *Local* institutional control
New questions...

• How does the TDL decide if a contribution from an “outside” developer should be included in the official code base for future versions?

• How does an “outside” developer know that modifications they make will be included in future versions of the software (or compatible with future versions)?

• How can we take advantage of (and focus) the work of non-TDL developers to the greatest benefit of the entire Vireo user community?

• How can we reach out to new users and enlist developers who are working outside of the VUG to incorporate their contributions?
Vireo Users Group

- Gathers and prioritizes user needs
- Guides future software development
- Facilitates information exchange among users
Bylaws of the Vireo Users Group

ARTICLE I: The name of this organization shall be the Vireo Users Group

ARTICLE II: MISSION

The Vireo Users Group (VUG) is designed to gather and prioritize constituent needs to guide the Texas Digital Library (TDL) and partnering organizations on the future development of the Vireo Electronic Thesis and Dissertation Management System. The VUG serves as the home for the open-source software development community that is coordinated by the Texas Digital Library. Finally, the VUG provides avenues for the exchange of information about Vireo needs and utilization.

ARTICLE III: ORGANIZATION

Section 1. Product Owner

The Product Owner (PO) serves as the liaison between the VUG and the development
Organizational structure

• Product Owner
• Members
• Steering Committee
• Developer Group
Steering Committee

Two co-chairs: Stephanie Larrison (Texas State) and David Reynolds (Johns Hopkins)

Ex officio TDL staff member: Ryan Steans (Director of Operations)

At least two other members: Joy Perrin & Heidi Winkler (Texas Tech); Laura Spradlin (University of Illinois at Urbana-Champaign)

“The diversity of the partnering organizations will be reflected in the membership of the steering committee.”
Other users can download the code base and make changes at any time. They can submit their changes back to github as “pull requests.”

TDL maintains the code.

Pull requests are included in the main code base only after a vote by the VUG.
TDL schedules regular development “cycles” devoted to development work on a set of feature requests and bug fixes.
What we learned

THE GOOD STUFF

• More person-power
• More rapid problem-solving and improvements.
• Broader user base
• User-driven improvements

THE CHALLENGES

• Coordination
• Policy-making
• Dependency on volunteer commitments
Voting Process - 2010

- 2 ballots per institution
- Up to 15 items per ballot allowed
- Priority levels between 1 and 5 were assigned
- No more than 3 items could be marked for each level of importance

- Feedback: Too complicated
Voting Process - 2012

- 2 ballots per institution
- Any number of items per ballot were allowed
- Priority levels between 1 and 5 were assigned
- No limit placed on how many times a priority level was assigned

Feedback - Too long (over 40 questions);
  Concern that voting favored smaller schools
Voting Process - 2014

• Voting should be equitable, not equal
• Each institution allotted 10-16 voting points based upon the average number of ETDs processed per year
• Points could be assigned to multiple enhancements
• More than half of the allotted points could not be placed on any single enhancement

Every school that voted got at least one of their choices in the top 4 enhancement requests
Top 3 Enhancement Requests -2014 vote

• Added feature for designated actions to trigger automated emails to designated roles or individuals

• Process for students to submit a corrected manuscript was improved

• Added ability for Administrative users to export a spreadsheet of data in specified columns from a filtered list
What about the 4th top request?

Vireo should have the option to set up lookup tables from csv. files in order to enhance metadata collection for local subject headings and keywords.

• Those who voted had vastly different interpretations of what this meant and what they planned to do with the functionality

• Will be addressed in future versions of Vireo
What else was added to Vireo?

- Added ability to email or cc designated roles or individuals from Vireo.

- Improved how Vireo handles multiple submissions - preventing invalid resubmissions while allowing submissions for a different degree.

- Added separate and optional embargo period for ProQuest submissions

- URL to published manuscript was added as an email template variable.
New enhancements... continued

• Added ability to filter by individual Checklist items

• Added ability to display individual Checklist items in student view

• Added ability to work on multiple submissions at once in separate windows or tabs

• Added Action Log to a file export package
Bonus enhancements

- ORCID integration
- ADA-compliant student interfaces
- Bug fixes
Where and when can I get it?

• Vireo 3.0 will be released for open source use on github the week of March 2, 2015

• Training: Post-conference, 1:30pm Friday

• Webinar: March 4, 1:30 – 3pm

• In person training: March 10 in Denton at the University of North Texas.

• Upgrades to hosted Vireo installations will begin in mid-March.
The Future of Vireo

- Rewrite using newer version of Play Framework
- Customized student submission forms and workflows
- Additional enhancements to use of Checklist items
- Enhanced metadata collection through the use of lookup tables or linking
- Incorporation of recommendations from TDL ETD Metadata Working Group
September 29-October 1
Austin, Texas