A Hykurax Panel

Advancing Hyku
Hyku for Consortia
Hyrax Analytics
Advancing Hyku: Open Source Institutional Repository Platform Development

- $1M grant from Arcadia
- October 2019 - August 2021
- Aim: Support the growth of open access through institutional repositories by introducing significant structural improvements and new features to the Samvera Community’s Hyku Institutional Repository.

https://advancinghyku.io/
What the Advancing Hyku project is NOT

- This project is not focused on building new institutional repository solutions.
- This project does not seek redirect resources from advancement of the Hyrax codebase. Code contributed for Hyku improvements will be available for community integration with Hyrax repository instances.
- This project does not claim that institutional repository population and use is the singular path to the future of open and sustainable scholarly communication.

Open thanks to Catherine Mitchell at CDL/UC, on whose excellent slide deck for another Arcadia-funded project, Next Generation Library Publishing, we based the format for today’s presentation.
Project goals

I. Make the open source community institutional repository product Hyku a more attractive dissemination option.

II. Working with the global open infrastructure community, the partners will introduce significant structural improvements and new features to the Samvera Community’s Hyku Institutional Repository platform.

III. Work toward sustainable, community-governed, open solutions that rival current best-of-breed commercial tools and that will propel scholarly communication forward.
Deliverables

Assess requirements, jointly create detailed, component-specific development plans, resulting in collaborative development of new capabilities:

- integrate open-resource discovery tools (e.g. Unpaywall, Open Access Button) to automatically scale repository contents
- add metrics to indicate usage of repository contents (e.g. citations, social media)
- connect and sync with author identification and profile services (e.g. ORCID)
- encourage interaction with contents via in-browser display, visualization and annotation
- establish pathways to long-term preservation services
<table>
<thead>
<tr>
<th>Partner</th>
<th>PI/Lead</th>
<th>Project Officer</th>
<th>Repository Content Owner</th>
<th>Commitment</th>
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<tbody>
<tr>
<td>UVA</td>
<td>Ellen Catz Ramsey</td>
<td>Sherry Lake</td>
<td>Pilot and assess migration from institution-supported repository to service-provider hosted Hyku instance</td>
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<tr>
<td>BL</td>
<td>Rachael Kotarski</td>
<td>Sara Gould</td>
<td>Pilot and assess platform architectural improvements</td>
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<td>UP</td>
<td>Brian Hole</td>
<td>Elisa Barrett</td>
<td>User interface assessment Code, implement, contribute to codebase</td>
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</table>
## Advancing Hyku Roadmap

![Gantt Chart](https://advancinghyku.io/)

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<tr>
<th>Task Name</th>
<th>Q4</th>
<th>Q1</th>
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<td>Author Profile Syntax*</td>
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<td>Preservation Pathways Integration (UWA)</td>
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<td>Reporting</td>
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*Includes contribution of code to Hyku Community database
Hyku for Consortia

Gretchen Gueguen, PALCI Digital Projects Manager
Amanda Hurford, PALNI Scholarly Communications Director
May 15, 2020
Values: A Collaborative Institutional Repository Should...

- Offer a **sustainable and controllable cost structure** for development, infrastructure, install, maintenance, storage, and support.
- Function as a **true IR**, offering as close as possible to parity with Digital Commons’ features.
- Allow for a **multi-tenant** environment, with individual branding and theming by institution and consortium.
- Be **open source** and promote open access to information.
- Be collaborative and can **allow cooperative management** across teams.
- **Be supported** by service providers and/or community developers.
- Be **future-facing** and not rooted in old technology structures.
- Be interoperable and **allow free-flow of data**. Easy import and export of metadata and objects.
- Be **user-centered and user-friendly** to users of all types (librarian, faculty, student).
- Be **flexible and scalable** in design and workflow.
- Be improvable and **customizable based on user needs**, and developments shared **back to the community**.
PALs (PALCI/PALNI) working together

- HykuDirect Grant
  - Partner with DPLA, Stanford, DuraSpace (2017)

- IR Task Force
  - Produced Vision Document and White paper

- CC-IR (Collaborative Consortial Institutional Repository) Phase 1 Pilot
  - 2018–2019
  - Stand-up Hyku and test basic features/functionality for consortial administration
  - Work with Notch8 to provide development and pilot hosting

- Hyku for Consortia Grant (IMLS-funded)
  - 2019–2020
New Feature Development

- Collaborative workflow support [in progress]
  - Dashboard for assigning user permissions at consortial level
  - Decoupling groups from roles to create customized permission levels

- 6 theme templates [in progress]
  - (2) IR-focused templates, (2) Collections-focused templates, (1) Neutral template, (1) OER template

- ETD and OER worktypes [in progress]
  - Created OER worktype
  - Implementing some front-end features for other needs like reviews and ratings
  - ETD worktype TBD
New Feature Development

- DOI integration
  - Requirements TBD
- Cross-tenant searching
  - Shared search across consortium/consortia
- Multi-tenant shared works
  - For digital exhibits
- Sharing with the larger Hyku community
  - Sharing code back, particularly work types
  - Re-using new contributions (bulk import)
Timeline & Next Steps

- Project initiation and planning: completed
- Requirements and design process (iterative): Fall 2019 - present
- Development sprints (iterative): April - September 2020*
- Testing and feedback: September - December 2020*
- Governance and business model development: ongoing
- Documentation and closeout: ongoing
THANK YOU!

Questions?

Visit: hykuforconsortia.org

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Email: gretchen@palci.org
Hyrax and Analytics

Samvera Virtual Connect
May 15, 2020

Margaret Mellinger, Oregon State University
Franny Gaede, University of Oregon

A brief history

2016: **Hyrax Analytics Working Group** formed

Kudos to the many members of this group, who kicked off this work

2017: **User stories**, use cases, **definitions** developed

2018: Analytics proposed as part of the **Hyrax Roadmap**

2019: Analytics work removed from Hyrax Roadmap as development priorities and staffing did not come together
A brief history... continued

- **2019**: IMLS Grant LG-36-19-0033-19 for “Open Impact: Developing Robust Analytics for Open Source Solution Bundle Hyrax” awarded to University of Oregon and Oregon State University.

- With the IMLS Grant, meet local needs of Oregon Digital as well as contribute this set of features back to the Samvera community & collaborate with other grantees to ensure rich coverage.

- Analytics and reporting functionality in Hyrax & Hyku will help create parity with other repository solutions in response to gap assessment.
## Timeline for the IMLS Grant

### Schedule of Completion (Revised)

<table>
<thead>
<tr>
<th>Task</th>
<th>Phase 1: Ramp Up</th>
<th>Phase 2: RFP</th>
<th>Phase 3: Build</th>
<th>Phase 4: Test &amp; Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and update the needs assessment created by the Hyrax Analytics Working Group</td>
<td>Project Team</td>
<td>Project Team</td>
<td>Project Team &amp; Contractor</td>
<td>Project Team &amp; Contractor</td>
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<tr>
<td>Complete institutional Request for Proposal process and hire the contractor who will be responsible for developing the analytics modules</td>
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<td>Project Team &amp; Contractor</td>
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<tr>
<td>Refine analytics design based on initial mockups and data from selected application(s)</td>
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<td>Project Team &amp; Contractor</td>
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<tr>
<td>Coordinate requirements with the Samvera community through the Hyrax Working Group</td>
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<td>Project Team &amp; Contractor</td>
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<tr>
<td>Develop the analytics modules</td>
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<td>Project Team &amp; Contractor</td>
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<td>Implement front-end visualization components</td>
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<td>Project Team &amp; Contractor</td>
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<td>Engage in usability testing</td>
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<td>Project Team &amp; Contractor</td>
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<td>Engage in community outreach online</td>
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<td>Project Team &amp; Contractor</td>
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<td>Engage and connect at identified conferences</td>
<td>Project Team</td>
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<td>Project Team &amp; Contractor</td>
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<td>Prepare project report evaluating the success of the project</td>
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<td>Project Team &amp; Contractor</td>
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<td>Project Team &amp; Contractor</td>
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</tbody>
</table>

*Note: Project Team, Project Team & Contractor, and others indicate the responsible parties for each task.*
Thank You

Questions?

mfgaede@uoregon.edu

margaret.mellinger@oregonstate.edu
## Discussion and Questions

### Advancing Hyku

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