



# Supporting Collaboration in Hyku: Workflows, Tools, Design



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# Outline

- Project Background
- Need and Vision for Collaboration
- Specifications
- Development
- Future plans



# Hyku for Consortia - Collaboration at its Core

- Together, we are developing an affordable, open-source, and collaborative institutional repository solution based on the Hyku software.
- PALCI and PALNI partnership
- Representing needs of nearly 100 individual institutions
- Development by Notch8
- Funded by IMLS



# Addressing Barriers with Collaboration

Barriers		Solutions	
1	Budget constraints	✓	Shared cost
2	Staffing limitations	✓	Central administration
3	Lack of technological support	✓	Unified technology management



# Deep Collaboration in Practice



## Services of the PALNI Digital Admin Team

### Digital Collection Creation in CONTENTdm

Includes setting user permissions, access restrictions, and enabling WorldCat harvesting/sync.

### Website Assistance in CONTENTdm

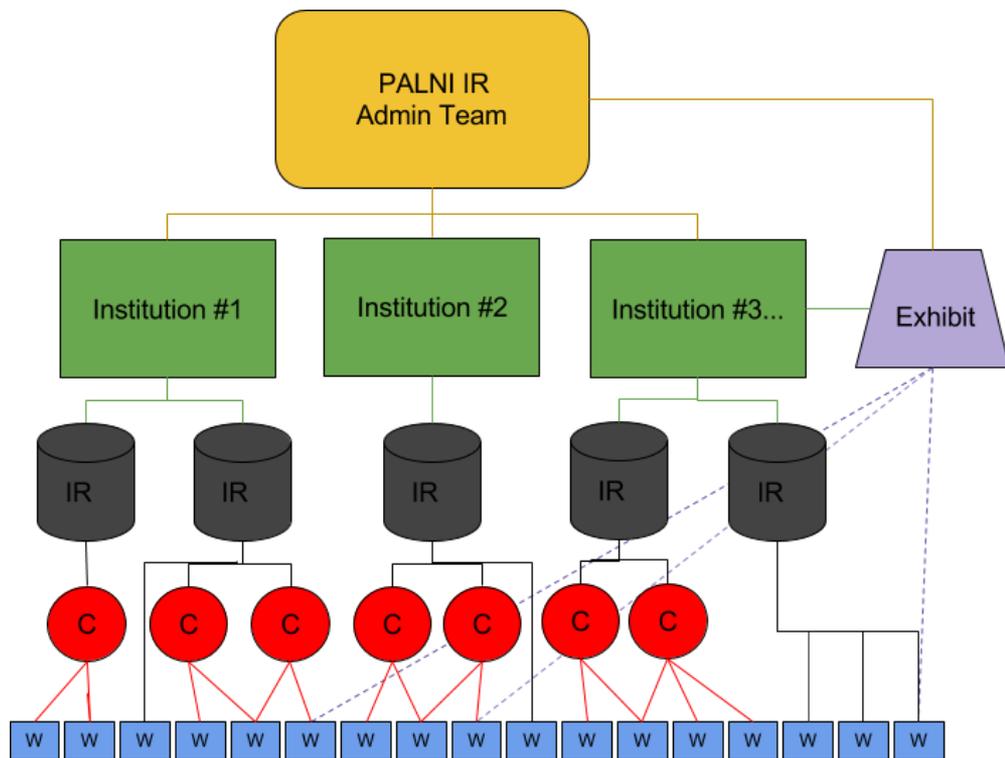
Custom banner creation for collection website  
Creation of custom institutional home page

### Training and Support

Getting started with CONTENTdm training in person or via web.  
Informal help with various aspects of digital projects, including mapping to Dublin Core, batch record loading, configuring collection website, and collecting statistics.



# Vision for IR Collaboration: Structure



## Functional Levels

PALNI IR Administration Team

Institution

Exhibit

IR: Institutional Repository

C: Collection(s)

W: Work(s)



# Vision for IR Collaboration: Central Management of a Multitenant Environment

- Ability to host multiple repositories within the same global system, each with its own users, collections, objects, and branding
- Arrangement allowing for “Deep Collaboration” and sharing of workflows across institutions
- Admins can manage (add, edit, delete) multiple institutional repositories, collections, works, and users across institutions
- Admins can manage web interface at both global and institutional level
- Ability to search all consortial content combined



# Vision for IR Collaboration: Users

- One to many
- One to one
- Assign roles
- Assign permissions
- Cross-tenant logins



# Partnerships for Collaboration



# Process

1. Gather data on needs from Product Management group
2. Analyze and develop potential plans
3. Share and revise with Product Management group
4. Work with development team to create specific tickets for work
5. Coordinate priorities for working on tickets with development team in bi-weekly sprints



## Workflow Examples

- Midwest Library Consortium has 35 members who are all staff. They will provide a Hyku repository service for members. A consortium administrator will administer the service as part of their duties, and a repository manager will manage members across the consortia will provide orientation, documentation, start-up, and will develop policies, workflows, and best practices.

## Users

### Consortia Roles

#### Administrator

- C
- f
- C
- R
- C



Consortium Repository Administrator

- Creates tenants
- Creates users

	Tenants		Collections		Admin sets	
	Action	Space	Action	Space	Action	Space
Consortia Admin	C/R/E/D/V	Co/M/T	C/R/E/D/P/V	Co/M/T	C/R/E/D/P/V	Co/M/T
Multi-ten Manager	R/E	M	C/R/E/D/P/V	M	C/R/E/D/P/V	M
Multi-ten Editor	R	M	C/R/E	M	R/E	M
Ten Manager	R/E	T	C/R/E/D/V	T	C/R/E/D/V	T
Ten Editor	R	T	C/R/E	T	R/E	T
Ten Approver	R	T	R	T	R	T
Ten Depositor	R	T	R	T	R	T
Ten Proxy-Depositor	R	T	R	T	R	T
Ten Authorized Viewer	R	T	R	T	R	T
Ten Viewer	R	T	R	T	R	T

#### Tenant Alpha

Customizes tenant

Creates Admin Sets & Collections

Creates other managers, editors, depositors, and viewers

Can delete objects & collections



Tenant Alpha Manager



Tenant Alpha Editor



Tenant Alpha Depositors

Views a work restricted to their authentication group



Tenant Alpha Authenticated Viewers



Public Viewers

#### Tenant Beta

Edits collection metadata

Reviews, enhances, approves uploaded works

Releases an embargo or lease on a work

Does not delete works or collections



Tenant Beta Depositors

Tenant Beta Proxy-Depositor



Views any public work

#### Tenant Gamma



Multi-Tenant Manager



Multi-Tenant Editorial Committee



Tenant Gamma Depositors

Deposits work

Creates an embargo/lease on a work

#### Tenant Delta



Tenant Delta Manager



Collection-specific Approvers



Tenant Delta Depositors

- LCSH subject headings before publishing the collection.
  - Every time a new item is digitized by the archival staff, the following workflow is followed: Tenant-only Editor uploads, Tenant-only Manager approves, and the work is published.

#### Depositor

- C
- C
- C
- C

- Cool-Guy West Coast Consortium has 10 members, all of whom are staff. They are all wanting a high level of service and flexibility. The consortium administrator will manage one member just to work on the repository service with members who will manage their own policies and workflows, but typically only

# But How?



# Proposed Workflow

1. Create a group of users
2. Give that group to some particular roles for CRUD functions at particular levels (tenants, collections, admin sets, or works)
3. Manage sipity roles (approve/mediated deposit) according to desire for either global or per-admin-set functions



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# Definitions: Groups and “Roles”

**Groups:** sets of users in Hyku given a particular name and treated as a single multi-user entity

**Roles:** Permissions to do various CRUD and management functions within various domains (tenants, collections/admin sets, and specific works)

**Sipity Roles:** Permission to deposit and approve in a mediated workflow admin set

Groups can be assigned roles and sipity roles.



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# Current “roles” in Hyku...

1.

The screenshot shows the 'Manage Users' interface. At the top, there is a breadcrumb trail: Home / Dashboard / Manage Users. Below this is a header 'Manage Users' with a user icon. A blue button 'Add or Invite user via email' is visible. Below that, there is a form to 'Add or invite new administrator (via email)' with a 'required' label, an input field, and an 'Invite u...' button. A blue bar indicates 'There are 5 users in this repository.' Below this, there is a 'Show 10 entries' dropdown. At the bottom, a table lists users with columns for 'Username' and 'Roles'. One user is listed: 'support@notch8.com' with the role 'admin'.

2.

The screenshot shows the 'Edit Administrative Set: custom workflow' page. The breadcrumb trail is Home / Dashboard / Collections / Edit. The page title is 'Edit Administrative Set: custom workflow'. There are four tabs: 'Description', 'Participants', 'Release and Visibility', and 'Workflow'. The 'Participants' tab is active. Below the tabs, there is a section 'Add Participants'. It contains two rows: 'Add group:' and 'Add user:'. Each row has a dropdown for selection, followed by 'as' or 'a', another dropdown for role selection, and an 'Add' button. The 'Add user:' dropdown is open, showing a list of roles: 'Select a role...', 'Manager', 'Depositor', and 'Viewer'. Below this, there is a section 'Current Participants'.



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# Step 1: Fix Groups

- Fix non-alignment of Hyrax and Hyku groups, making them one group system.

## Adding groups as participants to Admin Sets not working #1270

 Open bbranan opened this issue on Jun 21, 2017 · 2 comments



bbranan commented on Jun 21, 2017

Contributor



To duplicate:

1. Create a group
2. Select Administrative Sets and select one from the list (Default Admin Set is fine.)
3. Click Edit, then select the Participants tab
4. On the row with label "Add group:", in the box that says "Search for a group", type whatever you like, select a role, and click Add

Things to note:

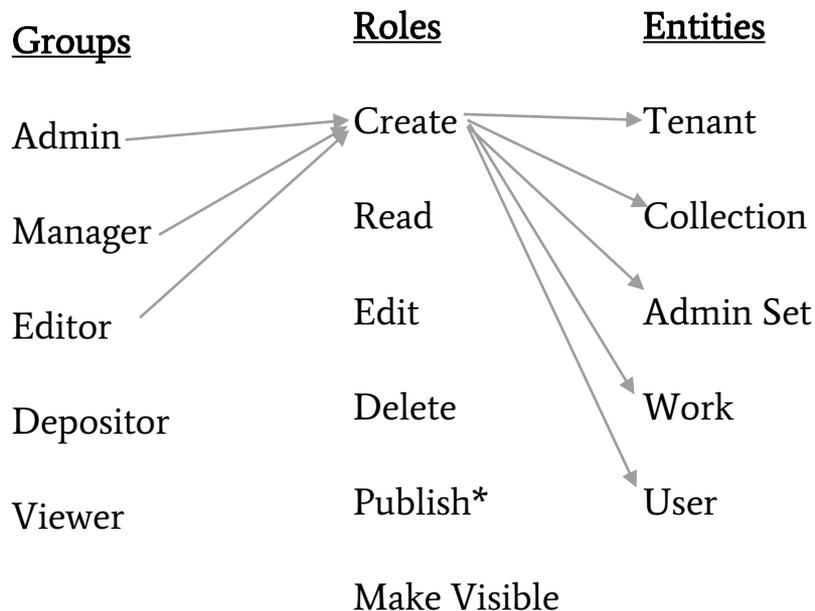
- There is no way to select from a list of existing groups
- No matter what you type into the field (even if you type nothing), it will be added to the list with the selected role. It doesn't matter if this is the name of an actual group or not.
- No matter what action is taken, even if it is clearly an error, the only feedback is a green bar at the top saying "The administrative set's participant rights have been updated".



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# Step 2: Make default groups with needed roles (PALS)



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# Step 2a: Ability to create custom groups and assign roles

The screenshot displays the PALCI user interface for managing workflow roles. The top navigation bar includes the PALCI logo, the user's name 'Gretchen Gueguen', and the language 'English'. The breadcrumb trail shows 'Home / Dashboard / Workflow Roles'. The main heading is 'Workflow Roles', and the sub-heading is 'New Group Role'. The form contains two required fields: 'Group' and 'Workflow role'. The 'Workflow role' dropdown menu is open, showing a list of roles such as 'Default Admin Set - approving (default)', 'Test mediated admin set - approving (default)', and 'custom workflow - approving (default)'. A search bar is located at the bottom right of the form.



# 2b: Synchronize tenant roles and admin set/collection roles

Replace current defaults with newly created roles

Home / Dashboard / Collections / Edit

## Edit Administrative Set: custom workflow

Description Participants Release and Visibility Workflow

### Add Participants

Add group:  as

Add user:  as

- ✓ Select a role...
- Manager
- Depositor
- Viewer

Current Participants



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# Step 3: Retain ability to assign Sipity roles in addition

## Assign Role

User **required**

Workflow role **required**

✓

- Default Admin Set - approving (default)
- Default Admin Set - approving (one\_step\_mediated\_deposit)
- Default Admin Set - depositing (default)
- Default Admin Set - depositing (one\_step\_mediated\_deposit)
- Default Admin Set - managing (default)
- Default Admin Set - managing (one\_step\_mediated\_deposit)
- Test mediated admin set - approving (default)
- Test mediated admin set - approving (one\_step\_mediated\_deposit)
- Test mediated admin set - depositing (default)
- Test mediated admin set - depositing (one\_step\_mediated\_deposit)
- Test mediated admin set - managing (default)
- Test mediated admin set - managing (one\_step\_mediated\_deposit)
- custom workflow - approving (default)
- custom workflow - approving (hyku\_commons\_mediated\_deposit)
- custom workflow - approving (one\_step\_mediated\_deposit)
- custom workflow - depositing (default)



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# Step 4: Elevate groups to multi-tenant (TBD)

The screenshot displays the Hyku Commons interface. At the top, the Hyku Commons logo is prominent. Below it, there are four distinct logos for member institutions, each with its corresponding URL:

- AMBS** Anabaptist Mennonite Biblical Seminary: [ambs.hykucommons.org](https://ambs.hykucommons.org)
- ANDERSON UNIVERSITY**: [au-archives.hykucommons.org](https://au-archives.hykucommons.org)
- GRACE COLLEGE & SEMINARY**: [grace.hykucommons.org](https://grace.hykucommons.org)
- UNIVERSITY OF INDIANAPOLIS**: [uiou.hykucommons.org](https://uiou.hykucommons.org)



# Step 5: create multi-tenant group editor (TBD)

Home / Manage Users

## Manage Groups

Create New

Show 10 entries Search:

Email	Display name	Department	Title	Affiliation	Superadmin	Actions
aahurford@gmail.com					false	Manage   Edit   Become   Delete
abigallmn@goshen.edu					false	Manage   Edit   Become   Delete
ake@susqu.edu					false	Manage   Edit   Become   Delete
amanda@palni.edu	Amanda Hurford				true	Manage   Edit   Become   Delete
audituser@example.com					false	Manage   Edit   Become   Delete
beau1smith@gmail.com	B.D. Smith				false	Manage   Edit   Become   Delete
bkern@allegheny.edu					false	Manage   Edit   Become   Delete
bsmith3@allegheny.edu					false	Manage   Edit   Become   Delete
cpaddick@bloomu.edu					false	Manage   Edit   Become   Delete
cpost@eastern.edu					false	Manage   Edit   Become   Delete

Showing 1 to 10 of 39 entries

Previous 1 2 3 4 Next



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# PALs working together

**Phase 2: 2018-2021**  
Improve features  
for multi-tenant  
administration



**Phase 3: 2021-2023?**

Remove barriers  
to adoption for  
institutions

**Phase 1: 2017-2018**

Get Hyku up and  
running

Methodology:

- Gathering input from many libraries
- Synthesize into prioritized needs
- Translate to the Hyrax/Hyku environment



# THANK YOU!

Questions?

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