Supporting Collaboration in Hyku: Workflows, Tools, Design

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Samvera Connect, October 28, 2020
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

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Budget constraints</td>
<td>Shared cost</td>
</tr>
<tr>
<td>2 Staffing limitations</td>
<td>Central administration</td>
</tr>
<tr>
<td>3 Lack of technological support</td>
<td>Unified technology management</td>
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</table>
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

Vestibulum congue

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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

1. Midwest Library Consortium has 35 members who are all required to provide a Halley repository service for members. A consortium administrator will administer the service as part of their duties, and a repository manager will provide appropriate service to members across the consortium. This service will provide orientation, documentation, a start-up, and will develop policies, workflows, and best practices.

<table>
<thead>
<tr>
<th>Tenants</th>
<th>Collections</th>
<th>Admin sets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Space</td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td>Admin/READ/Y</td>
<td>create/READ/PV</td>
</tr>
<tr>
<td>Multi-ten Manager R/E</td>
<td>M</td>
<td>C/READ/PV</td>
</tr>
<tr>
<td>Multi-ten Editor R</td>
<td>M</td>
<td>C/READ</td>
</tr>
<tr>
<td>Ten Manager R/E</td>
<td>T</td>
<td>C/READ/PV</td>
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<tr>
<td>Ten Editor R</td>
<td>T</td>
<td>C/READ</td>
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<tr>
<td>Ten Approver R</td>
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<tr>
<td>Ten Depositor R</td>
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<tr>
<td>Ten Proxy-Deposit R</td>
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<td>Ten Authorized VR</td>
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<td>R</td>
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<tr>
<td>Ten Viewer R</td>
<td>T</td>
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</tbody>
</table>

2. Cool-Guy West Coast Consortium has 10 members, all of whom are required to provide a Halley repository service for members. A consortium administrator will administer the service as part of their duties, and a repository manager will provide appropriate service to members across the consortium. This service will provide orientation, documentation, a start-up, and will develop policies, workflows, and best practices.

LCM subject headings before publishing the collection.

Every time a new item is submitted by an archivist/creator, the item is followed. Tenants-only Editor uploads, Tenants-only Manager publishes.

Colombo subject headings before publishing the collection.

Every time a new item is submitted by an archivist/creator, the item is followed. Tenants-only Editor uploads, Tenants-only Manager publishes.

LCSH subject headings before publishing the collection.

Every time a new item is submitted by an archivist/creator, the item is followed. Tenants-only Editor uploads, Tenants-only Manager publishes.
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
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.
Current “roles” in Hyku...

1. Manage Users
   - Add or invite user via email
   - Add or invite new administrator (via email)
   - There are 5 users in this repository.

2. Edit Administrative Set: custom workflow
   - Add Participants
     - Add group:
     - Add user:
     - Current Participants

[Images of Hyku user interface and PALNI logo]
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

bbranan commented on Jun 21, 2017

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”.

PALCI
Collaborative, Strategic, Innovative
Step 2: Make default groups with needed roles (PALS)

Groups
- Admin
- Manager
- Editor
- Depositor
- Viewer

Roles
- Create
- Read
- Edit
- Delete
- Publish*
- Make Visible

Entities
- Tenant
- Collection
- Admin Set
- Work
- User
Step 2a: Ability to create custom groups and assign roles
2b: Synchronize tenant roles and admin set/collection roles

Replace current defaults with newly created roles
Step 3: Retain ability to assign Sipity roles in addition

<table>
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<th>Workflow role required</th>
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</thead>
<tbody>
<tr>
<td>Default Admin Set - approving (default)</td>
</tr>
<tr>
<td>Default Admin Set - depositing (default)</td>
</tr>
<tr>
<td>Default Admin Set - managing (default)</td>
</tr>
<tr>
<td>Test mediated admin set - approving (default)</td>
</tr>
<tr>
<td>Test mediated admin set - depositing (default)</td>
</tr>
<tr>
<td>Test mediated admin set - managing (default)</td>
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<td>custom workflow - approving (default)</td>
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<td>custom workflow - depositing (default)</td>
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Step 4: Elevate groups to multi-tenant (TBD)
Step 5: create multi-tenant group editor (TBD)
PALs working together

Phase 1: 2017-2018
Get Hyku up and running

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

Phase 3: 2021-2023?
Remove barriers to adoption for institutions

Methodology:
- Gathering input from many libraries
- Synthesize into prioritized needs
- Translate to the Hyrax/Hyku environment
THANK YOU!

Questions?

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