



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

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

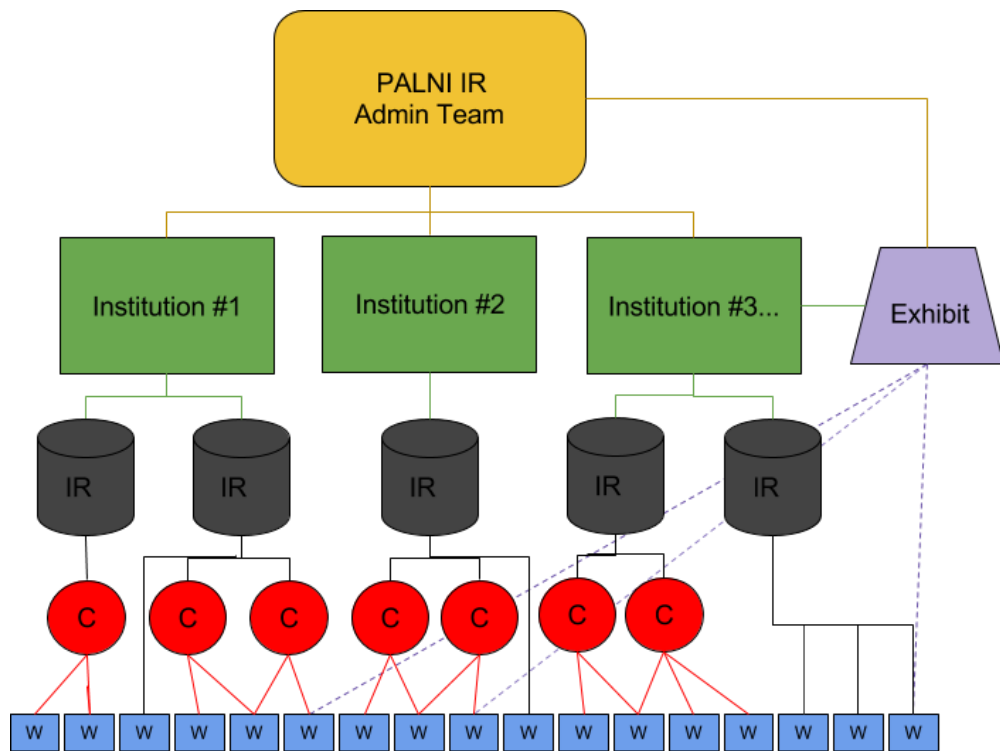
Custom banner creation for collection website
Creation of custom institutional home page

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 small libraries. 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 the repository. Members across the consortia will provide orientation, documentation, start-up, and will develop policies, workflows, and best practices.

Users

Consortia Roles

Administrator

- Creates tenants
- Creates users



Consortium Repository Administrator

- Creates tenants
- Creates users

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



Tenant Beta Depositors

Tenant Beta Proxy-Depositor



Tenant Gamma



Tenant Gamma Depositors

Deposits work

Creates an embargo/lease on a work

Tenant Delta



Tenant Delta Manager



Collection-specific Approvers



Tenant Delta Depositors

- Edits collection metadata
- Reviews, enhances, approves uploaded works
- Releases an embargo or lease on a work
- Does not delete works or collections



Multi-Tenant Editorial Committee

Views any public work

- 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.

- Cool-Guy West Coast Consortium has 10 members, all of which are large libraries. They want a high level of service and flexibility. The consortium administrator will manage the repository service with members just to work on the repository service with members for setting their own policies and workflows, but typically only

- Creates tenants
- Creates users
- Creates tenants
- Creates users
- Creates tenants
- Creates users

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.



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Current “roles” in Hyku...

1.

Home / Dashboard / Manage Users

Manage Users

Add or Invite user via email

Add or invite new administrator (via email) required Invite user

There are 5 users in this repository.

Show entries

Username	Roles
support@notch8.com	• admin

2.

Home / Dashboard / Collections / Edit

Edit Administrative Set: custom workflow

Description Participants Release and Visibility Workflow

Add Participants

Add group: as Add

Add user: as Add

Users granted a new role v... on works that are de

Current Participants

Manager
Depositor
Viewer




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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".

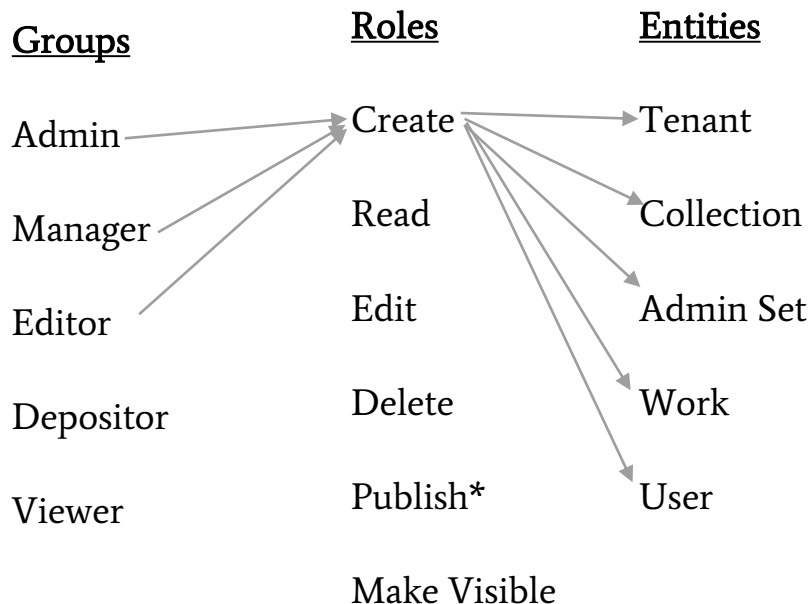


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PALCI

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



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, a language dropdown set to 'English', a notification bell, and the user's name 'Gretchen Gueguen'. The left sidebar contains a menu with sections for 'ACTIVITY' (Repository Activity, Your activity, Reports), 'REPOSITORY CONTENTS' (Collections, Works, Importers, Exporters), 'TASKS' (Review Submissions, Manage Users, Manage Groups, Manage Embargoes, Manage Leases), and 'CONFIGURATION' (Settings, Workflow Roles). The main content area is titled 'Workflow Roles' and features a 'New Group Role' button. Below this, there are two dropdown menus: 'Group' (marked as required) and 'Workflow role' (also marked as required). The 'Workflow role' dropdown is open, showing a list of roles such as 'Default Admin Set - approving (default)', 'Test mediated admin set - approving (default)', and 'mediated deposit - approving (default)'. A search bar is located at the bottom right of the interface.



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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

Users granted a new role v... n works that are de

Current Participants



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)

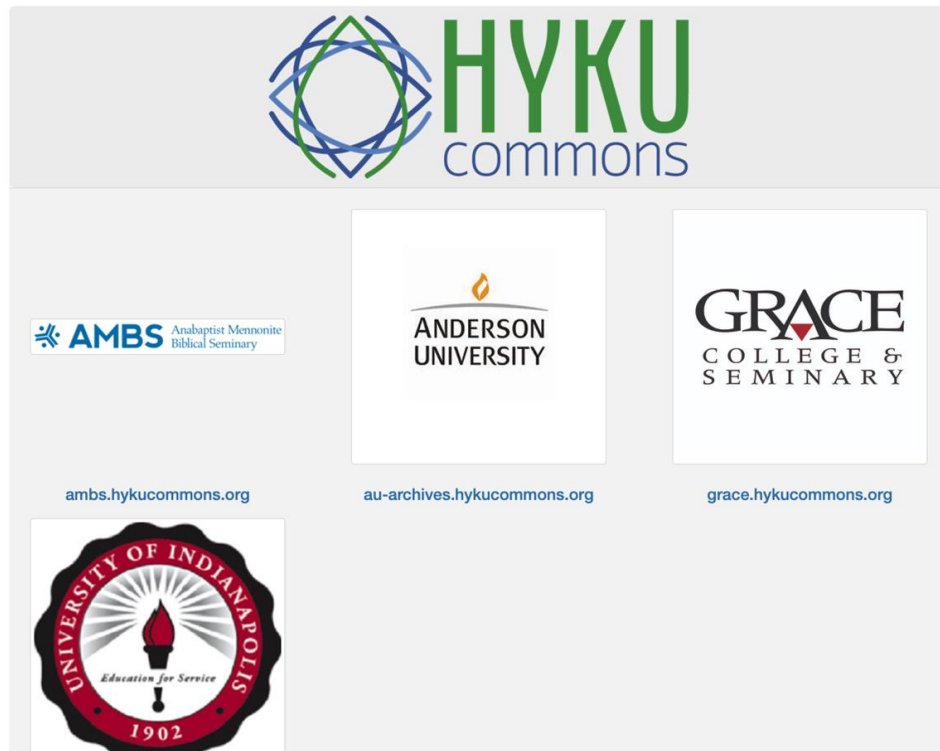
custom workflow - depositing (default)



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



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
abigalinn@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



PALs working together

Phase 2: 2018-2021

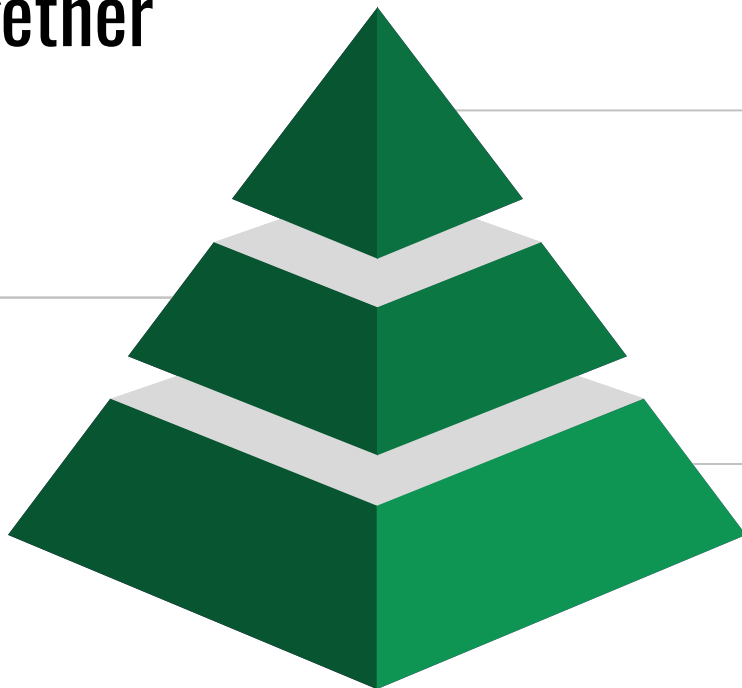
Improve features
for multi-tenant
administration

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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