These slides: http://bit.ly/2Nw8RX1

# Architecting Repository Infrastructure with Collection Types, Admin Sets, and Collection

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# What we'll be discussing...

**Building Blocks** (45 min)

**Use Cases** (1 hr)

**Break** (15 min)

**Hands On Activity** (30 min)

**Group Discussion** (30 min)

# Building Blocks

# Building Block

Collection Type

Collection

Admin Set

Work Type

Work

Fileset

# Building Blocks - COLLECTION TYPES

**Collection Type**

Provides a means to create configurations that control the behaviors and feature sets of collections.  Limits who can create each type of collection in recognition that, in some systems, not all users have the same levels of access.

# Building Blocks - COLLECTION TYPES

## Configurable Functionality

- nesting collections in collections
- sharing with other users and groups
  - optionally use sharing as work permission template
- branding header and logos
- discovery control
- multiple-membership control

# Building Blocks - COLLECTION TYPES

## Configurable Roles

- managers - can do anything with all collections of this type
- creators - can create collections of this type

# Building Blocks - COLLECTION TYPES

A Few Common Types of Collections

- User Collections
- Exhibits
- Admin Sets

# Building Blocks - COLLECTION TYPES

Common Types of Collections: User Collections

- Allow individual users to organize works into collections.

# Building Blocks - COLLECTION TYPES

## Common Collection Type: User Collection (defaults)

- CAN...
  - nest
  - share
  - allow multi-membership
  - brand
  - make discoverable
- CANNOT...
  - apply share settings to new works added directly to a User Collection
- ROLES...
  - managers -- site admins
  - creators -- any user

# Edit Collection Type: User Collection

Description | Settings | Participants | Badge Color

These settings determine how collections of this type can be managed and discovered.

**Warning: These settings cannot be changed after a collection of this type has been created.**

- [x] **NESTING** Allow collections of this type to be nested (a collection can contain other collections)
- [x] **BRANDING** Allow collections of this type to be branded
- [x] **DISCOVERY** Allow collections of this type to be discoverable
- [x] **SHARING** Allow users to assign collection managers, depositors, and viewers for collections they manage
  - [ ] **APPLY TO NEW WORKS** When new works are created directly in the collection, grant sharing users and groups permissions for the new work according to their collection roles.
- [x] **MULTIPLE MEMBERSHIP** Allow works to belong to multiple collections of this type
- [ ] **REQUIRE MEMBERSHIP** A work must belong to at least one collection of this type
- [ ] **WORKFLOW** Allow collections of this type to assign workflow to a new work
- [ ] **VISIBILITY** Allow collections of this type to assign initial visibility settings to a new work

Save changes | Cancel

# Edit Collection Type: User Collection

Description | Settings | Participants | Badge Color

## Add Participants

You can designate both groups and users as creators and managers of collections of this type

**Add group:** Search for a group... as Select a role... Add

**Add user:** Search for a user... as Select a role... Add

## Current Participants

### Managers

Managers of collections of this type can edit collections other users have created, including adding to and removing works from a collection, modifying collection metadata, and deleting collections.

| Collection Managers | Type | Action |
|---|---|---|
| Repository Administrators | Group | Remove |

### Creators

Creators of collections of this type can create and manage their own collections.

| Collection Creators | Type | Action |
|---|---|---|
| Registered Users | Group | Remove |

Save changes | Cancel

# Building Blocks - COLLECTION TYPES

Common Types of Collections: Exhibits

- Curators collect works under a common theme to be released as an exhibit for the public.

# Building Blocks - COLLECTION TYPES

## Common Types of Collections: Exhibit

- CAN...
  - brand
  - make discoverable
  - share
  - allow multi-membership
- CANNOT...
  - nest
  - apply share settings to new works added directly to an exhibit
- ROLES...
  - managers -- site admins; exhibits coordinators
  - creators -- exhibit managers

# Edit Collection Type: Exhibit

Description | Settings | Participants | Badge Color

These settings determine how collections of this type can be managed and discovered.

**Warning: These settings cannot be changed after a collection of this type has been created.**

- [ ] **NESTING** Allow collections of this type to be nested (a collection can contain other collections)
- [x] **BRANDING** Allow collections of this type to be branded
- [x] **DISCOVERY** Allow collections of this type to be discoverable
- [x] **SHARING** Allow users to assign collection managers, depositors, and viewers for collections they manage
  - [ ] **APPLY TO NEW WORKS** When new works are created directly in the collection, grant sharing users and groups permissions for the new work according to their collection roles.
- [x] **MULTIPLE MEMBERSHIP** Allow works to belong to multiple collections of this type
- [ ] **REQUIRE MEMBERSHIP** A work must belong to at least one collection of this type
- [ ] **WORKFLOW** Allow collections of this type to assign workflow to a new work
- [ ] **VISIBILITY** Allow collections of this type to assign initial visibility settings to a new work

Save changes | Cancel

# Edit Collection Type: Exhibit

Description | Settings | Participants | Badge Color

## Add Participants

You can designate both groups and users as creators and managers of collections of this type

**Add group:** Search for a group... as Select a role... Add

**Add user:** Search for a user... as Select a role... Add

## Current Participants

## Managers

Managers of collections of this type can edit collections other users have created, including adding to and removing works from a collection, modifying collection metadata, and deleting collections.

| Collection Managers | Type | Action |
|---|---|---|
| Repository Administrators | Group | Remove |
| Exhibit Coordinators | Group | Remove |

## Creators

Creators of collections of this type can create and manage their own collections.

| Collection Creators | Type | Action |
|---|---|---|
| Exhibit Managers | Group | Remove |

Save changes Cancel

# Building Blocks - COLLECTION TYPES

## Common Types of Collections: Admin Set

Provides repository administrators the ability to apply workflow(s) used for new works, control visibility options available for works, and set initial edit/read permissions to designated users and groups.

# Building Blocks - COLLECTION TYPES

## Common Types of Collections: Admin Set

- MUST...
  - requires membership * (all works must belong to 1 and only 1 Admin Set)
  - set a workflow for new works *
- CAN...
  - set limits on work visibility options *
  - Share (with roles)
- CANNOT...
  - brand
  - nest
  - make discoverable
  - allow multi-membership
- ROLES...
  - managers - site admins
  - creators - site admins

* Options available for Admin Sets only

# Edit Collection Type: Admin Set

Description | Settings | Participants | Badge Color

These settings determine how collections of this type can be managed and discovered.

**Warning: These settings cannot be changed after a collection of this type has been created.**

- [ ] **NESTING** Allow collections of this type to be nested (a collection can contain other collections)
- [ ] **BRANDING** Allow collections of this type to be branded
- [ ] **DISCOVERY** Allow collections of this type to be discoverable
- [x] **SHARING** Allow users to assign collection managers, depositors, and viewers for collections they manage
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- [ ] **MULTIPLE MEMBERSHIP** Allow works to belong to multiple collections of this type
- [x] **REQUIRE MEMBERSHIP** A work must belong to at least one collection of this type
- [x] **WORKFLOW** Allow collections of this type to assign workflow to a new work
- [x] **VISIBILITY** Allow collections of this type to assign initial visibility settings to a new work

Save changes | Cancel

# Edit Collection Type: Admin Set

Description | Settings | Participants | Badge Color

## Add Participants

You can designate both groups and users as creators and managers of collections of this type

**Add group:** Search for a group... as Select a role... Add

**Add user:** Search for a user... as Select a role... Add

## Current Participants

### Managers

Managers of collections of this type can edit collections other users have created, including adding to and removing works from a collection, modifying collection metadata, and deleting collections.

| Collection Managers | Type | Action |
|---|---|---|
| Repository Administrators | Group | Remove |

### Creators

Creators of collections of this type can create and manage their own collections.

| Collection Creators | Type | Action |
|---|---|---|
| Repository Administrators | Group | Remove |

Save changes | Cancel

# Building Blocks: WORKFLOW STRATEGY

- Workflows dictate what happens before a work is available
- Can only be applied on Admin Sets

- Options
  - Default workflow (auto-publish)
  - 1-step mediated workflow (approval workflow)
  - Custom workflow (Tombstone)

# Edit Administrative Set: AS Policy Harder Foundation

Description | Participants | Release and Visibility | Workflow

Each administrative set has a workflow associated with it. This workflow is applied to all works added to the administrative set. Select the workflow to be used for this administrative set below.

- ○ One-step mediated deposit workflow
  A single-step workflow for mediated deposit in which all deposits must be approved by a reviewer. Reviewer may also send deposits back to the depositor.
- ◉ Default workflow
  A single submission step, default workflow

Save changes | Cancel

# Building Blocks - VISIBILITY STRATEGY

VISIBILITY options can be enforced for new works in an admin set.

- Embargoes (with ability to determine allowed length)
- Leases
- Discoverability: public, private, institutional (authenticated users)
- Only available with Admin Sets

VISIBILITY as policy

- Ability to restrict options on the work form that a depositor can choose
  - Ex. students submitting DTD cannot embargo
  - Ex. temporal permissions to materials based on legal agreement

# Edit Administrative Set: AS Policy Harder Foundation

Description | Participants | Release and Visibility | Workflow

Release and visibility settings determine the options available to depositors when submitting a work to this administrative set. Changes to these settings do not affect previously deposited works.

## Release

Set embargoes and lease polices for this administrative set.

- ○ Do not allow embargoes or leases
- ● Allow depositor to choose settings:
  - ● Depositor can choose any embargo length; leases are allowed
  - ○ Depositor can choose embargo up to date: mm / dd / yyyy
  - ○ Depositor can choose embargo period up to: Select embargo period..
- ○ Depositor must choose embargo -- delay release of all works until mm / dd / yyyy

## Visibility

Set visibility policies for the administrative set. Setting honors embargo policies above.

- ○ Public - depositor can only choose public visibility setting
- ● All settings allowed -- depositor can choose. Must use this option to allow leases.
- ○ Institution -- depositor can only select institution visibility setting
- ○ Private -- depositor can only select private for visibility. Access is restricted to repository administrators, managers, and viewers of the set. Must be used with "No embargo" setting above.

Save changes | Cancel

# Edit Administrative Set: test for icon

Description | Participants | Release and Visibility | Workflow

Release and visibility settings determine the options available to depositors when submitting a work to this administrative set. Changes to these settings do not affect previously deposited works.

## Release

Set embargoes and lease polices for this administrative set.

- ○ Do not allow embargoes or leases
- ◉ Allow depositor to choose settings:
  - ◉ Depositor can choose any embargo length; leases are allowed
  - ○ Depositor can choose embargo up to date: mm/dd/yyyy
  - ○ Depositor can choose embargo period up to: Select embargo period..
- ○ Depositor must choose embargo -- delay release of all works until mm/dd/yyyy

## Visibility

Set visibility policies for the administrative set. Setting honors embargo policies above.

- ○ Public - depositor can only choose public visibility setting
- ◉ All settings allowed -- depositor can choose. Must use this option to allow leases.
- ○ Institution -- depositor can only select institution visibility setting
- ○ Private -- depositor can only select private for visibility. Access is restricted to repository administrators, managers, and viewers of the set. Must be used with "No embargo" setting above.

Save changes | Cancel

# Building Blocks - COLLECTIONS

**Collections**

Allow users to organize works by grouping them into named collections. The set of features supported for a collection is dependent on its collection type.

# Select type of collection

- Admin Set
  A collection type that provides Admin Set functionality in Hyrax.
- User Collection
  A User Collection can be created by any user to organize their works.
- Exhibit
  A curated collection of works for the general public.

Close | Create collection

# Building Blocks - COLLECTIONS

## Additional per Collection Configurations

- custom metadata
  - shared by all collections
  - can control visibility of metadata fields in the collection form class (for editing) and presentation class (for display) based on collection type
- branding header and logos (if brandable)
- visibility
  - set to public, institutional, private (if discoverable)
  - always private (if not discoverable)

**Title** ✱

Please enter agency name.

World Agricultural Outlook Board

**Acronym**

WAOB

**Abstract or Summary**

Please enter a description of the agency listed above.

The World Agricultural Outlook Board (WAOB) / Office of the Chief Economist serves as USDA's focal point for economic intelligence and the commodity outlook for U.S. and world agriculture. The Board coordinates, reviews, and approves the monthly World Agricultural Supply and Demand Estimates (WASDE) report, houses USDA's Joint Agricultural Weather Facility, and coordinates the annual USDA Agricultural Outlook Forum.

**Contact email**

oce@oce.usda.gov

**Contact phone**

202-720-5447

**Location city**

Washington

# A customization to have collection_type specific metadata

```
# Override Hyrax::CollectionPresenter.terms method
def terms
  if collection_type.title == 'agency'
    [:acronym, :contact_email, :contact_phone,
     :location_city, :location_state, :homepage_url]
  else
    [:contact_email, :contact_phone]
  end
end
```

# Building Blocks - COLLECTIONS

## Additional per Collection Configurations

- custom metadata
  - shared by all collections
  - can control visibility of metadata fields in the collection form class (for editing) and presentation class (for display) based on collection type
- branding header and logos (if brandable)
- visibility
  - set to public, institutional, private (if discoverable)
  - always private (if not discoverable)

Description | Branding

## Branding

Optionally, you can upload a banner image and/or logo images to associate with this collection. If uploaded, these images will be displayed at the top of the collection page to provide unique branding for the collection.

**Banner**

An image to be displayed at the top of the collection page. For best results, upload an image (JPG, GIF or PNG) that is at least 120 pixels tall and 1200 pixels wide..

+ Choose File

butterfly_banner.jpg ✖ Remove

**Logo**

One or more images to be displayed at the top of the collection page. For best results, upload an image (JPG, GIF or PNG) that is 40 pixels in height. Larger images will be resized to 40 pixels in height.

+ Choose File

LD4L_github.png

Link URL: http://ld4l.org

Alt Text: Linked Data for Libraries

✖ Remove

Save changes | Cancel

# Building Blocks - COLLECTIONS

## Additional per Collection Configurations

- custom metadata
  - shared by all collections
  - can control visibility of metadata fields in the collection form class (for editing) and presentation class (for display) based on collection type
- branding header and logos (if brandable)
- visibility
  - set to public, institutional, private (if discoverable)
  - always private (if not discoverable)

Description Branding Discovery

These settings determine who is able to discover and view this collection's landing page; they do not affect the visibility of items in the collection.

If you chose not to make this collection open access, you can still share the collection with specific users and groups using the Sharing tab.

- ○ **Public** - Make available to all.
- ○ **Institution** - Restrict access to Institution.
- ◉ **Private**- Keep to myself with option to share.

Save changes Cancel

# Building Blocks - COLLECTIONS

## Additional per Collection Configurations

- sharing with other users and groups (if sharable)
  - collection is shared with others based on roles
  - sets initial sharing of works created in the collection (if applying sharing to works)
    - NOTE: sharing is applied to works only if the work is created in a single collection
- roles
  - managers - can edit metadata PLUS depositor and viewer actions
  - depositors - can deposit collections/works PLUS viewer actions
  - viewers - can view metadata and list of collections/works in the collection

Description | Branding | Discovery | Sharing

Regardless of the visibility settings of this collection, you can share this collection with specific groups and users.

## Add Sharing

**Add group:** Search for a group... as Select a role... Add

**Add user:** Search for a user... as Select a role... Add

Users granted a new role will only gain the role on works that are deposited after that role has been granted.

## Currently Shared With

## Managers

Managers of this collection can add to and remove works from the collection, modify collection metadata, and delete the collection.

| User/Group | Type | Action |
|---|---|---|
| Repository Administrators | Group | Remove |
| elr37@cornell.edu | User | Remove |

## Depositors

Depositors of this collection can view the collection and add works to it, even if the visibility permissions of the collection otherwise would not permit them to view it.

*No depositors have been added to this collection.*

## Viewers

Viewers of this collection can view it even if the visibility permissions of the collection otherwise would not permit them to view it.

*No viewers have been added to this collection.*

# Groups vs Users as Participants

http://samvera.github.io/collection-sharing.html#setting-groups-vs-users-as-participants

When is access assigned to works?

- Access assigned through roles are copied to the work at create time.
- Access assigned to a work is NOT updated if the admin set or collection holding is edited to change the individuals and groups granted access.

Impact for maintenance of works:

- If a user leaves, every work must be updated when access is granted to the user.
- If a user in a group leaves, they are removed from the group and no edits are required on the works.

# Building Blocks

**Work Type**

A classification tool for the submission of distinct types of works. Custom work types can be generated to allow different descriptive metadata to be collected as appropriate for the classification.

## Select type of work

### Generic Work

General purpose work type. Select this if the more specific work types below are not suited to the work you want to add.

### Image

Single or multi-page image works.

Close | Create work

Home / Dashboard / Works / Add New Work

# Add New Generic Work

Descriptions | Files | Relationships | Sharing

To create a separate work for each of the files, go to Batch upload

**Title** required

A name to aid in identifying a work.

+ Add another Title

**Creator** required

The person or group responsible for the work. Usually this is the author of the content. Personal names should be entered with the last name first, e.g. "Smith, John.".

+ Add another Creator

**Keyword** required

Words or phrases you select to describe what the work is about. These are used to search for content.

+ Add another Keyword

**Rights statement** required

Additional fields

## Save Work

Requirements

- Describe your work

Visibility

- Public — Make available to all.
- Institution — Restrict access to Institution.
- Embargo — Set date for future release.
- Lease — Set date for future reduced access.
- Private — Keep to myself with option to share.

**On behalf of**

Yourself

Save

# Building Blocks - WORK TYPES

- Created using generator

```
rails generate hyrax:work Work
rails generate hyrax:work MovingImage
```

- Define custom metadata specific to a work type
  - See Customizing Metadata tutorial in samvera.github.io docs

# Building Blocks - WORK TYPES

Strategies for defining work types:

- One generic worktype
  - Master list of all possible fields used
- Content specific worktypes
  - Article
  - Dataset
  - Moving Image
- Submission specific worktypes
  - Department Master Paper or Dissertation

# Building Blocks - WORKS

**Works**

The basic content item in the repository. Works bring together file(s) and associated metadata and presents them as one intellectual object.

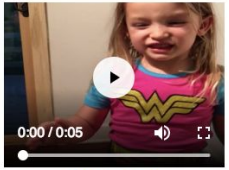
Works

Home

# Image

## Video, Image, PDF, Audio test Public Deposited

Analytics




Download video

Citations | Citations:

**Last modified**
09/18/2018

**Creator**
Mark Bussey
Julie Rudder

**Subject**
stuff & things

**Keyword**
Video

**Rights statement**
In Copyright - Educational Use Permitted

**License**
Attribution-NonCommercial-NoDerivs 3.0 United States

## Relationships

**In Collection:**
A new collection as a Manager creating a collection
JRR Test Collection

## Items

| Thumbnail | Title | Date Uploaded | Visibility | Actions |
|---|---|---|---|---|
| | test for delay - I am a child of the work Video, Image, PDF, Audio test | 10/17/2017 | Public | |
| | Studio shot | 2017-09-26 | Public | Select an action |
| | Margot vid | 2017-09-27 | Public | Select an action |

# Building Blocks - WORKS

- Works can be
  - metadata only records (configuration option)
  - contain 1 or more files
  - nested in other works

# Building Blocks - WORKS

## Nested Works/Parent and Child Works

- Good for anything that needs different metadata (descriptive, DOIs)
- Can be ordered
- Can be multiple worktypes

Examples:

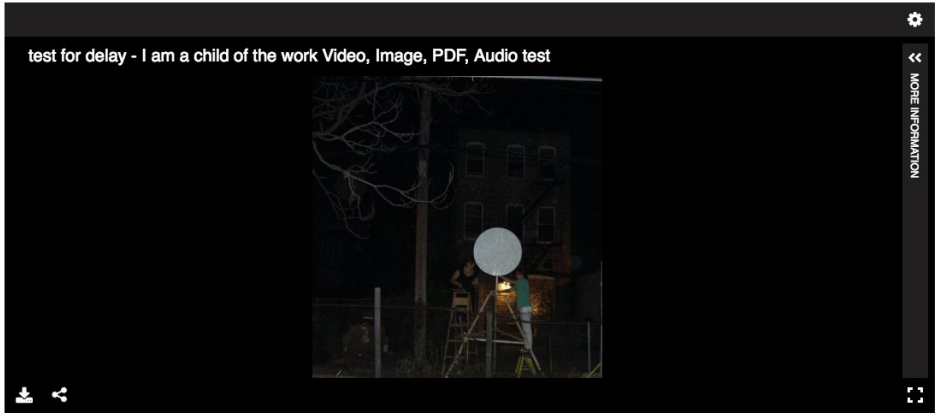
- Article with dataset
- Journal issues with individual articles
- Book with chapters

# Generic Work

## test for delay - I am a child of the work Video, Image, PDF, Audio test

Public Deposited

Analytics




Citations Citations:

**Last modified**
02/12/2018

**Creator**
test

**Keyword**
test

**Rights statement**
In Copyright

## Relationships

**In Collection:**

# Building Blocks - FILESETS

**Filesets**

The container representing a single file uploaded to the repository.  It is a set that holds the original uploaded file and any generated derivative files (e.g. thumbnails, full text, etc.).

Download image

Analytics

# Studio shot Public

## File Details

**Depositor:** jrudder@email.unc.edu

**Date Uploaded:** 2017-09-26

**Date Modified:** 2017-09-27

**Fixity Check:** Fixity checks have not yet been run on this object

**Characterization:** Height: 3024
Width: 4032
File Format: jpeg (JPEG image data, Exif standard: [TIFF image data, big-endian, direntries=11, manufacturer=Apple, model=iPhone 6s, orientation=upper-left, xresolution=162, yresolution=170, resolutionunit=2, software=10.3.2, datetime=2017:09:26 19:15:44, GPS-...
Original Checksum: 72938c025acdba49d4e2badea670c6fb
Mime Type: image/jpeg

| User Activity | Date |
|---|---|

# Building Blocks - FILESET

- Must be attached to a work (has separate view)
- Title only (no rich descriptive metadata)
- Technical metadata at this level
- Allows ordering, file-specific access control, single-use links

# Use Cases

# Building Block

Collection Type

Collection

Admin Set

Work Type

Work

Fileset

# Use Case: Self Deposit

1. Describe the high-level use case...

In a self-deposit repository system, any user with a login can add works and files.

# Use Case: Self Deposit - USERS

## 2. Describe the users your system will support…

Admins

- As an admin user, I want to configure and maintain the system.

All other users

- As a logged in user, I want to create new works that are attributed to me and discoverable by the public.
- As a logged in user, I want to be able to organize my works for my own use.
- As a logged in user, I want to be able to share my works with others for collaboration.

# Use Case: Self Deposit - USER GROUPS

## 2. Describe the users your system will support...

Do groups of users need to be created for permission controls?

- admins - users with admin privileges
- registered - users with login credentials

Both defined for you automatically.

# Use Case: Self Deposit - WORK TYPES

## 3. Describe the type(s) of content your system will support...

Research output including...

- Articles
- Presentations
- Datasets
- Posters
- Images
- Video

No special processing based on filetype. One worktype will support all these.

# Use Case: Self Deposit - WORKFLOW

## 4. Describe any workflow needs...

- User creates and saves in one step.

Workflow: Default Workflow

# Use Case: Self Deposit - VISIBILITY

## 5. Describe any visibility or embargo policy needs...

- No special visibility policies.
- Users can make their works private or public
- Don’t allow embargo and lease as options.

# Edit Administrative Set: Default Admin Set

Description | Participants | Release and Visibility | Workflow

Release and visibility settings determine the options available to depositors when submitting a work to this administrative set. Changes to these settings do not affect previously deposited works.

## Release

Set embargoes and lease polices for this administrative set.

- (●) Do not allow embargoes or leases
- ( ) Allow depositor to choose settings:
  - (●) Depositor can choose any embargo length; leases are allowed
  - ( ) Depositor can choose embargo up to date: mm / dd / yyyy
  - ( ) Depositor can choose embargo period up to: Select embargo period..
- ( ) Depositor must choose embargo -- delay release of all works until mm / dd / yyyy

## Visibility

Set visibility policies for the administrative set. Setting honors embargo policies above.

- ( ) Public - depositor can only choose public visibility setting
- (●) All settings allowed -- depositor can choose. Must use this option to allow leases.
- ( ) Institution -- depositor can only select institution visibility setting
- ( ) Private -- depositor can only select private for visibility. Access is restricted to repository administrators, managers, and viewers of the set. Must be used with "No embargo" setting above.

Save changes | Cancel

# Use Case: Self Deposit - DISCOVERABILITY

6. Describe any needs around discoverability...

- Users can set works to public making them discoverable
- May want to use set google scholars metatags (customization)
- May want to set schema.org metadata (customization likely)
    - Some out of the box
    - schema.org type = work type (probably not adequate)

# Use Case: Self Deposit - GROUPING

## 7. How will works be grouped together?

All works will belong to the default admin set

Users can organize their works in User Collections

- anyone can create
- nesting of collections for organization is allowed
- user can set up sharing with other users
- works can belong to multiple User Collections
- can NOT make User Collections discoverable (default allows this)
- can NOT add branding to User Collections (default allows this)

# Edit Collection Type: User Collection

Description | Settings | Participants | Badge Color

These settings determine how collections of this type can be managed and discovered.

**Warning: These settings cannot be changed after a collection of this type has been created.**

- [x] **NESTING** Allow collections of this type to be nested (a collection can contain other collections)
- [x] **BRANDING** Allow collections of this type to be branded
- [x] **DISCOVERY** Allow collections of this type to be discoverable
- [x] **SHARING** Allow users to assign collection managers, depositors, and viewers for collections they manage
  - [ ] **APPLY TO NEW WORKS** When new works are created directly in the collection, grant sharing users and groups permissions for the new work according to their collection roles.
- [x] **MULTIPLE MEMBERSHIP** Allow works to belong to multiple collections of this type
- [ ] **REQUIRE MEMBERSHIP** A work must belong to at least one collection of this type
- [ ] **WORKFLOW** Allow collections of this type to assign workflow to a new work
- [ ] **VISIBILITY** Allow collections of this type to assign initial visibility settings to a new work

Save changes | Cancel

# Use Case: Self Deposit - RELATIONSHIPS

8. Describe any needs around relationships...

- Collections to Collections
- Collections to Works
- Admin Sets to Works
- Works to Works
- Works to Filesets

# Use Case: Self Deposit - RELATIONSHIPS

8. Describe any needs around relationships...

- Collections to Collections - OK
- Collections to Works - Optional for organization
- Admin Sets to Works - Default Admin Set sufficient
- Works to Works - No
- Works to Filesets - Yes

# Use Case: Self Deposit

## Collection Types Strategy

- user collections

## Admin Sets Strategy

- default admin set only
- do not show admin set selection to user
- all works automatically go into the default admin set

# Use Case: Self Deposit

## Workflow Strategy

- default workflow (create and save in 1 step)

## Visibility Strategy

- users can set visibility of works individually
- collections are always private

# Use Case: Self Deposit

**Work Type Strategy**

- single work type
- no nesting of works

**Work Strategy**

- users self-deposit works and set visibility of their works

# Use Case: Self Deposit

**User Collection**
(Collection Type)

creators: any user
nestable
shareable
multi-membership
NOT discoverable
NOT brandable

**Admin Set**
(Collection Type)

| Workflow Strategy | creators: admin<br>shareable<br>single membership<br>membership required<br>NOT nestable<br>NOT discoverable<br>NOT brandable |
|---|---|
| default | |
| **Visibility Strategy** | |
| not limited<br>set in work | |

**My Collection**
(Collection of type User Collection)

**Default Admin Set**
(Default Workflow)

**Generic Work**
(Work Type)

**My Work**
(Work of type Generic Work)

Fileset

# Use Case: Mediated Deposit

## Describe the high-level use case.

In a repository where master's papers from two separate departments need to be reviewed and approved by a designated person(s) in a department before they become public.

# Use Case: Mediated Deposit

## Describe the types of content.

Master's Papers created as a requirement of graduation.

Some papers may have supplementary files like datasets.

Departments have unique metadata fields like "concentration" or "track"

# Use Case: Mediated Deposit

## Describe the types of users.

Depositing users are occasional or one-time users.

Reviewing users are staff in an academic department.

Library staff also help monitor content and workflow errors.

# Use Case: Mediated Deposit

## Describe any needs around relationships:

The main relationship needs is between files and their metadata.

# Use Case: Mediated Deposit

## Describe any workflow needs:

Students submit works, that must be reviewed by a department staff member before they become public.

# Use Case: Mediated Deposit

## Describe the any visibility or embargo policy needs:

Department A wants students to only submit public works with an option of embargo of 2 years

Department B  wants students to only submit public works with an option of embargo for 6 months

# Use Case: Mediated Deposit

## Describe any needs around discoverability.

Content is mostly discovered via Google Scholar

All department works linked from a department website.

# Use Case: Mediated Deposit

## How will works be grouped together?

Departments want to link to all of their works, something to put into their websites.

# Use Case: Mediated Deposit

What types of collections are needed

## Collection Types Strategy

- Admin Sets needed to apply workflow
- Worktype facet will be used to link to all works in a department

## Admin Sets Strategy

- Two admin sets, one per department
- Managers will serve as “approvers” of each submission

# Use Case: Mediated Deposit

## Workflow Strategy

- 1-step workflow will be applied to each admin set

## Visibility Strategy

- Admin Set A - public submissions and allow embargoes of up to 2 years
- Admin Set B - public submissions and allow embargoes of up to 6 months

Home / Dashboard / Collections / Edit

# Edit Administrative Set: Admin set Test 12: embargo 2 years allowed but not required, must be public, no leases.

Description | Participants | Release and Visibility | Workflow

Each administrative set has a workflow associated with it. This workflow is applied to all works added to the administrative set. Select the workflow to be used for this administrative set below.

- (●) One-step mediated deposit workflow
  A single-step workflow for mediated deposit in which all deposits must be approved by a reviewer. Reviewer may also send deposits back to the depositor.
- ( ) Default workflow
  A single submission step, default workflow

Save changes | Cancel

Home / Dashboard / Collections / Edit

# Edit Administrative Set: Admin set Test 12: embargo 2 years allowed but not required, must be public, no leases.

Description | Participants | Release and Visibility | Workflow

Release and visibility settings determine the options available to depositors when submitting a work to this administrative set. Changes to these settings do not affect previously deposited works.

## Release

Set embargoes and lease polices for this administrative set.

- ○ Do not allow embargoes or leases
- ◉ Allow depositor to choose settings:
  - ○ Depositor can choose any embargo length; leases are allowed
  - ○ Depositor can choose embargo up to date: 09/20/2020
  - ◉ Depositor can choose embargo period up to: 2 years after deposit
- ○ Depositor must choose embargo -- delay release of all works until 09/20/2020

## Visibility

Set visibility policies for the administrative set. Setting honors embargo policies above.

- ◉ Public - depositor can only choose public visibility setting
- ○ All settings allowed -- depositor can choose. Must use this option to allow leases.
- ○ Institution -- depositor can only select institution visibility setting
- ○ Private -- depositor can only select private for visibility. Access is restricted to repository administrators, managers, and viewers of the set. Must be used with "No embargo" setting above.

Save changes | Cancel

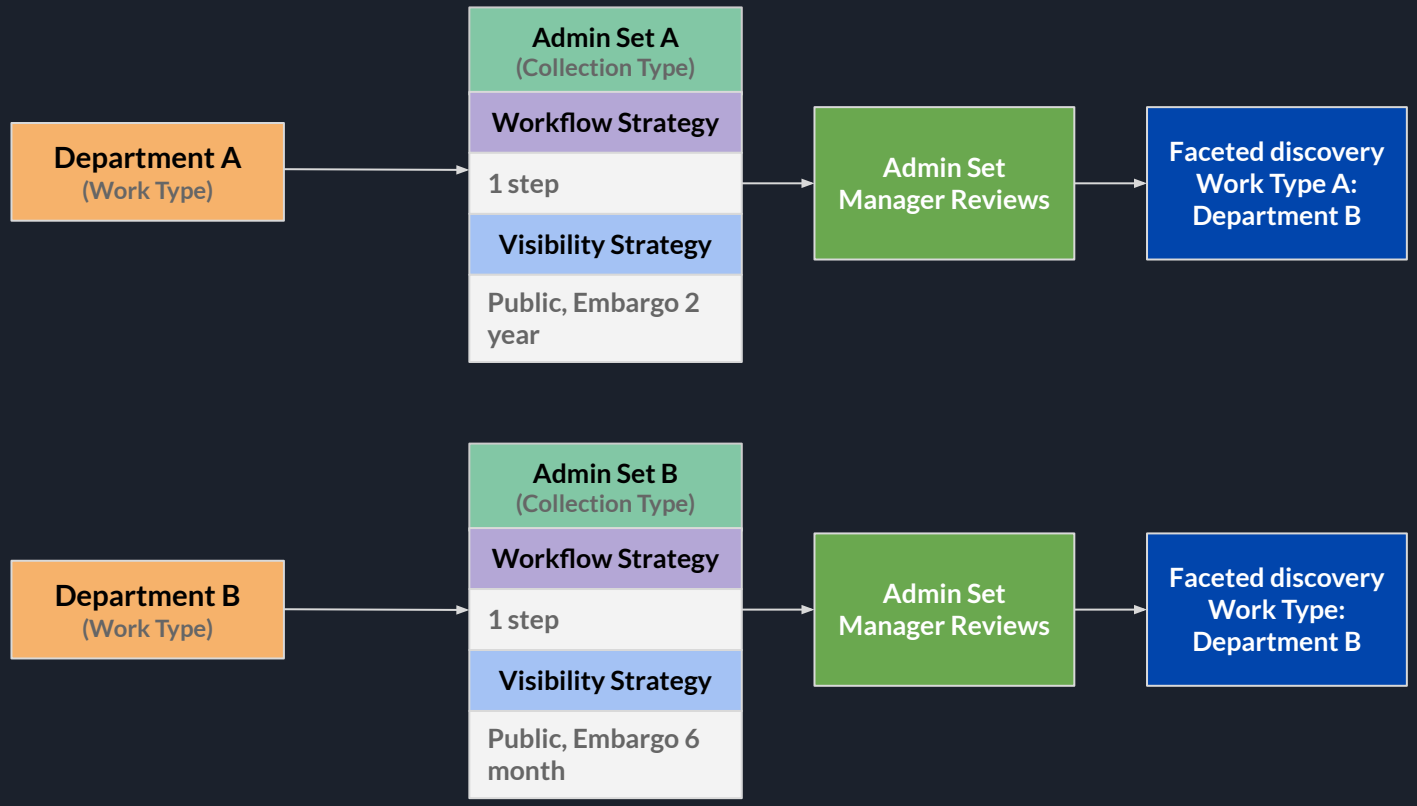
# Use Case: Mediated Deposit

## Work Type Strategy

- Two new worktypes will be developed.
- Customization needed for worktype to go to correct Admin Set

## Work Strategy

- No need for child works, will use filesets and work object only




**Custom code would be needed to automatically deposit into correct Admin Set*

Inbox (10,509) - julie

https://nurax-dev.cu

AWS960194.pdf // G

Error

Nurax

jrudder@email.unc.edu

ACTIVITY

Your activity

Reports

REPOSITORY CONTENTS

Collections

Works

TASKS

Review Submissions

Manage Embargoes

Manage Leases

CONFIGURATION

Settings

Workflow Roles

Testing Admin Set - Chrome Mac
Test Chrome Windows
Firefox Windows Test
Admin Set Test 18: forced embargo until Nov 10 2018 - only institution allowed, no leases.
Admin Set Test 17: forced embargo until Nov 10 2018 - all settings allowed except no leases.
Admin Set Test 16: forced embargo until Nov 10 2018 - must be public, no leases.
Admin Set Test 15: embargo of 2 years allowed but not required. no leases, only institution
Admin Set Test 14: embargo of 2 years allowed but not required. no leases, any visibility
Admin set Test 13: embargo 3 year allowed but not required, must be public, no leases.
Admin set Test 12: embargo 2 years allowed but not required, must be public, no leases.
Admin set Test 11: embargo 1 year allowed but not required, must be public, no leases.
Admin Set Test 10: embargo of 6 months allowed but not required, must be public, no leases.
Admin Set Test 9: Embargo allowed B/w now and 2050, no leases- Institution setting only
A new test Admin Set
Admin Set Test 7 - Embargo up to 2050 allowed, but not required. no leases. Public setting forced after embargo.
Admin Set Test 8: Embargo up to 2050 allow but not required, no leases, any visibility.
Admin Set Test 6: No embargoes or leases - Private only
Admin Set Test 5 - No embargoes or leases, must be institution
Admin Set Test 4 - No embargo or lease, Any visibilty
Admin Set Test 3 -No embargoes, no leases, only public
Admin Set Test 2 - One step workflow. All setting allowed, leases allowed
Admin Set Test 1 - Default Workflow, Unchanged Release and Visibility, User can select any setting -
✓ Default Admin Set

This work is currently in these collections

| Collection title | Action |
|---|---|
| JRR Test Collection | Remove from collection |

## Other Works in this Work

Find child work Search for a work... Add

Deposit new work as child of this work

rk

ents

e your work

vailable to all.

Institution
Restrict access to Institution.

Embargo
Set date for future release.

Lease
Set date for future reduced access.

Private
Keep to myself with option to share.

On behalf of

Yourself

# Use Case: Curated Exhibits

1. Describe the high-level use case...

There is a repository holding Rare Materials. We want to extend the repository to create curated exhibits of the materials.

Design Criteria:

- Many of the materials are governed by policies stating whether they can be viewed through a website.
- There will be multiple exhibits.

Different groups of people will be responsible for assembling the exhibits.

# Use Case: Curated Exhibits - USERS

## 2. Describe the users your system will support…

Admins

- configure and maintain the system

Content Creators

- create works
- control visibility of works

# Use Case: Curated Exhibits - USERS

## 2. Describe the users your system will support...

Exhibit Creators

- create exhibit collections
- control visibility of the exhibit by keeping it private until it is complete
- work as part of a team on creating the exhibit
- add public works to the exhibit

General Public

- Find and view individual works
- Find and view exhibits of work
- Can NOT login to the system

# Use Case: Curated Exhibits - USER GROUPS

## 2. Describe the users your system will support...

Do groups of users need to be created for permission controls?

- admins - users with admin privileges
- registered - users with login credentials (no special privileges)
- content_creators - can create/edit their works
- for each exhibit... (replacing X with exhibit identifier)
  - exhibit_X_managers - can edit exhibit metadata and add works
  - exhibit_X_depositors - can adds works in the exhibit
  - exhibit_X_viewers - can view the exhibit even if it is private

# Use Case: Curated Exhibits - WORK TYPES

## 3. Describe the type(s) of content your system will support...

Digital representations of physical holdings of rare materials

- Images

# Use Case: Curated Exhibits - WORKFLOW

## 4. Describe any workflow needs...

Creation of works...

- Content creator user creates.
- Rare materials librarian approves.

Workflow: 1-step Mediated Deposit

# Use Case: Curated Exhibits - WORKFLOW

## 4. Describe any workflow needs...

Curation in an exhibit...

- Exhibit is private
- Exhibit creator team adds works to collection.
- Exhibit creator team reviews (not software controlled)
- When ready, exhibit visibility is set to public

Workflow: N/A - no workflows in Hyrax for controlling collection content

# Use Case: Curated Exhibits - VISIBILITY

## 5. Describe any visibility or embargo policy needs...

Some rare materials are governed by policies with limits...

- viewable by library staff only
- cannot be viewed by general public (requires login)
- viewable during certain dates only

# Use Case: Curated Exhibits - DISCOVERABILITY

## 6. Describe any needs around discoverability...

Basic Discovery

- All users can discover public works via search
- All users can discover public collections via search
- Users cannot find admin sets via search

Enhanced Discovery

- No need for google scholars
- May want to set schema.org metadata (customization likely)
  - Some out of the box
  - schema.org type = work type (probably not adequate)

# Use Case: Curated Exhibits - GROUPING

## 7. How will works be groups together?

- Users can organize their works in User Collections
  - Anyone can create
  - Nesting of collections for organization is allowed (optional)
  - User can set up sharing with other users (optional)
  - No branding or discovery
- Control visibility of groups of works based on policies
  - Only certain staff control policies
  - Staff creating works know which policy applies and assign the new work to a policy
  - A work can be assigned to one and only one policy
  - No branding or discovery or nesting

# Use Case: Curated Exhibits - GROUPING

## 7. How will works be groups together?

- Exhibits can group related works to create public exhibitions
  - Only certain staff can create
  - Groups of staff share the work of curating of the exhibit
  - Exhibits are brandable and discoverable
  - No nesting
- Do we need to allow for works grouped in works?
  - we may want to have child works for multi-part digitized images
  - otherwise, one work per digitized item

# Use Case: Curated Exhibits - RELATIONSHIPS

8. Describe any needs around relationships...

- Collections to Collections
- Collections to Works
- Admin Sets to Works
- Works to Works
- Works to Filesets

# Use Case: Curated Exhibits - RELATIONSHIPS

8. Describe any needs around relationships...

- Collections to Collections - No for exhibits and visibility policies
- Collections to Works - Yes for exhibits
- Admin Sets to Works - Yes for visibility policy
- Works to Works - Yes for multi-part digitized works
- Works to Filesets - Yes for holding digitized images of rare materials

# Use Case: Curated Exhibits

## Collection Types Strategy

- user collections - ok for individuals to organize works (always private)
- exhibits - for public curated exhibits

## Admin Sets Strategy

- one per visibility policy
- content creator selects the admin set at work creation time
- can move to a different admin set later, but the visibility policy of the newly selected admin set will NOT be applied

# Use Case: Curated Exhibits

## Workflow Strategy

- mediated deposit for creation of new works

## Visibility Strategy

- initial visibility set by admin set's visibility policy
- content creators can modify visibility after a work is created by editing the work
- exhibit collections are private until the team makes public

# Use Case: Curated Exhibits

## Work Type Strategy

- single work type (all works are digital images of physical rare materials)
- works may be nested

## Work Strategy

- only users in the content_creator group can create/edit works
- works have filesets holding the digitized rare materials

# Use Case: Curated Exhibit

**User Collection**
(Collection Type)

creators: any user
nestable
shareable
multi-membership
NOT discoverable
NOT brandable

**Admin Set**
(Collection Type)

**Workflow Strategy**

mediated deposit

**Visibility Strategy**

multiple visibility policies

**Exhibit**
(Collection Type)

creators: curators
NOT nestable
shareable
multi-membership
discoverable
brandable

**My Collection**
(Collection of type User Collection)

**Gift of Gail and Stephen Rudin**
(one per visibility policy)

**Lincoln's Unfinished Work**
(Collection of type Exhibit)

**Images**
(Work Type)

**Simon Lake**
(Work of type Images)

Fileset

**Ford's Theater Playbill**
(Work of type Images)

Fileset

# Use Case: Multiple Use Cases in One System

Now you need to support all three use cases in one system.

What Collection Types would you use?

How many Admin Sets?

How many Work Types?

What pitfalls would you watch out for?

# Use Case: Multiple Use Cases in One System

Now you need to support all three use cases in one system. Start by thinking about the content and the users:

What Collection Types would you use?

- User Collections
- Admin Sets
- Exhibits

How many Admin Sets?

- 3 or more

How many Work Types?

- At least 4?

What pitfalls would you watch out for? Any custom work needed?

# Break -- 15 min

# Hands on Activity

Hyrax Repo Design Worksheet

# Hands On Activity

Using your own use cases or ones we supply, design a repository implementation strategy using the building blocks.

# Group Discussion

# Group Discussion

Share back how you designed your repository