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.

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:

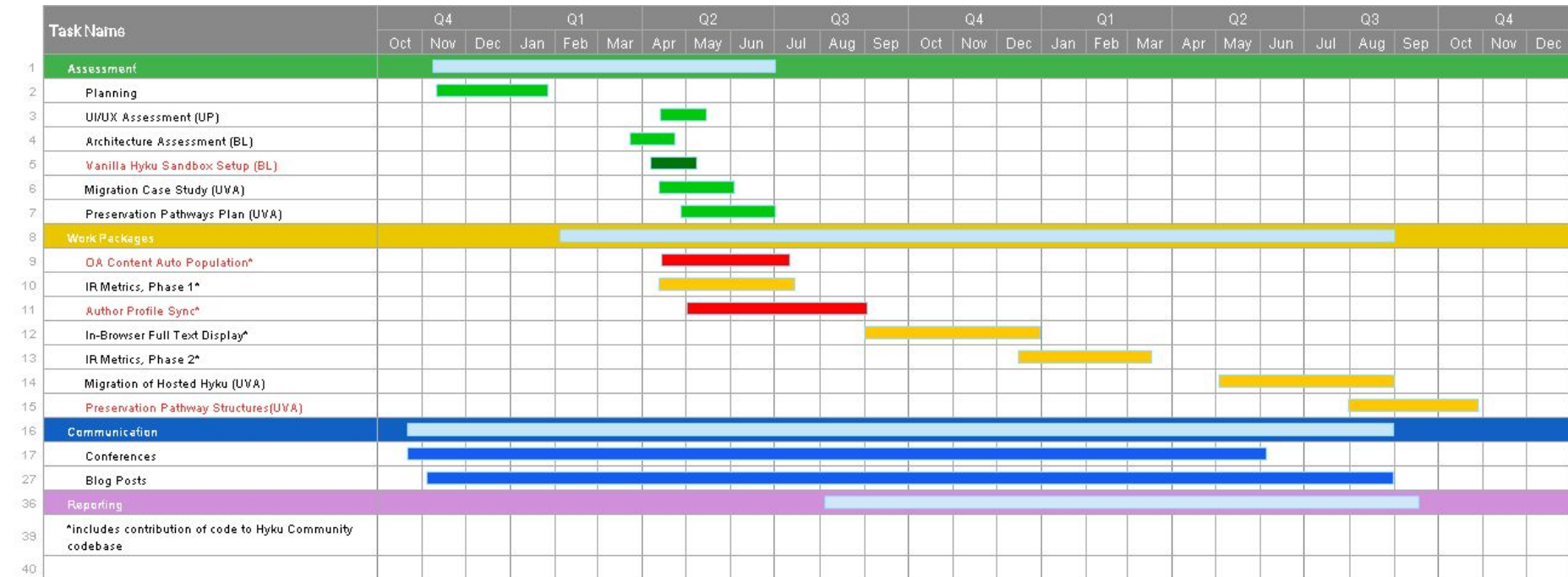- integrate open-resource discovery tools (e.g. Unpaywall, Open Access Button) to automatically scale repository contents
- add metrics to indicate usage of repository contents (e.g. citations, social media)
- connect and sync with author identification and profile services (e.g. ORCID)
- encourage interaction with contents via in-browser display, visualization and annotation
- establish pathways to long-term preservation services

Partner Commitments

UVA	Ellen Catz Ramsey, PI Sherry Lake, repository content owner	Pilot and assess migration from institution-supported repository to service-provider hosted Hyku instance
BL	Rachael Kotarski, lead Sara Gould, repository content owner 0.5FTE project officer	Pilot and assess platform architectural improvements
UP	Brian Hole, lead Elisa Barrett, project manager 3.3FTE developers	User interface assessment Code, implement, contribute to codebase

Advancing Hyku Roadmap

https://advancinghyku.io/

	Task Name	Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	Assessment																											
2	Planning																											
3	UI/UX Assessment (UP)																											
4	Architecture Assessment (BL)																											
5	Vanilla Hyku Sandbox Setup (BL)																											
6	Migration Case Study (UVA)																											
7	Preservation Pathways Plan (UVA)																											
8	Work Packages																											
9	OA Content Auto Population^																											
10	IR Metrics, Phase 1^																											
11	Author Profile Sync^																											
12	In-Browser Full Text Display^																											
13	IR Metrics, Phase 2^																											
14	Migration of Hosted Hyku (UVA)																											
15	Preservation Pathway Structures(UVA)																											
16	Communication																											
17	Conferences																											
27	Blog Posts																											
36	Reporting																											
39	^includes contribution of code to Hyku Community codebase																											
40																												

Hyku for Consortia

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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)
- **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

- **IR Task Force**
  - Produced Vision Document and White paper

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

Twitter: @hyku4consortia

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)	Phase 1: Ramp Up			Phase 2: RFP					Phase 3: Build											Phase 4: Test & Report				
	2019								2020										2021					
	October	November	December	January	February	March	April	May	June	July	August	September	October	November	December	January	February	March	April	May	June	July	August	September
Review and update the needs assessment created by the Hyrax Analytics Working Group	Project Team																						
Complete institutional Request for Proposal process and hire the contractor who will be responsible for developing the analytics modules				Project Team																			
Refine analytics design based on initial mockups and data from selected application(s)									Project Team & Contractor														
Coordinate requirements with the Samvera community through the Hyrax Working Group									Project Team & Contractor														
Develop the analytics modules												Project Team & Contractor											
Implement front-end visualization components												Project Team & Contractor											
Engage in usability testing												Project Team											
Engage in community outreach online	Project Team																						
Engage and connect at identified conferences						Virtual Connect						Samvera Connect						Code4Lib		Open Repositories				
Prepare project report evaluating the success of the project comparing initial needs assessment to the feature set ultimately available in the analytics module and by the level of adoption and feedback from the community																					Project Team			

Thank You

Questions?

mfgaede@uoregon.edu

margaret.mellinger@oregonstate.edu

Discussion and Questions

Advancing Hyku https://advancinghyku.io/	Ellen Ramsey ellen@virginia.edu Brian.Hole@ubiquitypress.com *Rachael.Kotarski@bl.uk*
Hyku for Consortia hykuforconsortia.org	@hyku4consortia Gretchen Gueguen gretchen@palci.org Amanda Hurford amanda@palni.edu
Hyrax Analytics	Margaret.Mellinger@oregonstate.edu *Franny Gaede mfgaede@uoregon.edu*