

Workflow Examples

1. Midwest Library Consortium has 35 members who are all small private institutions. They will provide a Hyku repository service for members. A consortia staff member will administer the service as part of their duties, and a repository working group with members across the consortia will provide orientation, documentation, assistance with start-up, and will develop policies, workflows, and best practices for objects. This working group has a chair who has a higher level of responsibility and permissions than other members of the working group. A new institution has just asked for a repository.

MLC has:

- Consortia Admin
- Multi-tenant Managers and Editors
- Tenant-only Managers and Editors

Workflow scenarios:

- Multi-tenant set up
- Library collection with multiple creators/editors

Steps to set up repository:

1. Consortia Admin creates the new tenant. She makes the Working Group chair Multi-tenant Manager and the other members of the committee Multi-tenant Editor.
 2. Multi-Tenant Manager & Editor set up initial admin sets and worktypes based on the standards for the repository. They hold an orientation session with the new tenant
 3. Multi-Tenant Manager creates user: Tenant-only Manager.
 4. Tenant-only Manager customizes the theme of their new tenant.
 5. Tenant-only Manager creates Tenant-only Editor library staff members to help with population of the new repository.
 6. Tenant-only Editor is in the archives department and has a digitized archives collection to add to the repository. He creates a new collection and uses one of the pre-populated admin set choices. He then bulk uploads the content and saves it but does not publish it.
 7. Tenant-only Manager reviews each item created by Tenant-only Editor to add LCSH subject headings before publishing the collection.
 8. Every time a new item is digitized by the archival staff, the same workflow is followed: Tenant-only Editor uploads, Tenant-only Manager adds subjects and publishes.
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2. Cool-Guy West Coast Consortium has 10 members, all of whom are private institutions wanting a high level of service and flexibility. The consortia employs a full-time staff member just to work on the repository service with members. Each tenant is responsible for setting their own policies and workflows, but typically only has one staff member

assigned to the Hyku repository. A new tenant is created for a University that wants to begin collecting faculty works.

CGWCC has:

- Consortia Admin
- Tenant-only Manager

Workflow scenarios:

- Direct library/consortia relationship
- Library staff upload works for faculty
- A proxy uploader

Steps to set up repository:

1. Consortia Admin creates new tenant and sets up access for Tenant-only Manager.
 2. Consortia Admin works with Tenant-only Manager to set up the tenant with the needed customization of theme, admin sets, and worktypes.
 3. Tenant-only Manager begins collecting works created by faculty members, checking their copyright status and uploading them into the repository.
 4. Tenant-only Manager publicizes a service for faculty to submit their own works. She creates a new admin set for these works that will create a step for her to review, edit, and approve works before they are added.
 5. One of the faculty members on campus has a large body of work she would like to contribute. She wants to have her grad student upload works for her, but she wants to review them before submitting them. She has a Tenant-only Depositor role in the repository. She assigns proxy-control to her student who is also Tenant-only Depositor. The student uploads the works and saves them as drafts. The faculty member then reviews before submitting them to the library for deposit.
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3. Wealthy Alumni College is part of a consortium that provides a Hyku repository. They have made an arrangement with their graduate school to begin receiving electronic theses and dissertations as part of the grad school's graduation process. Grad school staff receive the electronic files from students along with basic information and decisions regarding license and embargo, and put these materials into the repository. Library staff then review and enhance records before approving them for publication or embargo.

WAC has:

- Consortia Admin
- Tenant-only Manager
- Tenant-only Approver

Workflow scenarios:

- External staff/collaborative workflow
- Embargo
- Two admin sets within the same collection

Steps to set up repository

1. Consortia Admin sets up tenant and gives access to Tenant-only Manager.
 2. Consortia Admin works with Tenant-only Manager to set up the tenant with the needed customization of theme, admin sets, and worktypes.
 3. Tenant-only Manager at the library creates a new collection for the grad school and selects the admin set that requires approval before submission. He makes himself an approver for the collection.
 4. Tenant-only Manager creates a new user for a grad school staff member as Tenant-only Approver
 5. Tenant-only Approver begins uploading student works in bulk into the repository with draft metadata, licenses, and embargoes.
 6. Tenant-only Manager reviews and approves works uploaded by Tenant-only Editor.
 7. Tenant-only Manager has also digitized paper theses and dissertations from the archives. He uploads to the same grad school collection, but bypasses the approval step by using a different admin set.
 8. When embargo periods end, Tenant-only Manager releases works into the repository.
4. Commonwealth Consortium runs a repository service for its members which is successful. They have recently applied for state funding to host a state-wide repository for Open Educational Resources. This tenant will be open for any institution of higher-learning in the state to submit materials for broad distribution, not just members of the consortium. It is overseen by a state-based committee with representatives across different types of institutions.

CC has:

- Consortia Admin
- Multi-tenant Editors
- Numerous Tenants with their own Managers, Editors, Depositors

Workflow scenario:

- A shared tenant for a particular type of work
- Multiple types of multi-tenant and tenant users

Steps to set up repository

1. Consortia Admin sets up new tenant, and gives access to Tenant-only Manager, the grant-funded staff member working at the consortia in charge of the OER tenant.
2. Tenant-only Manager sets up the repository theme and creates the admin sets and collections needed for the OER tenant.
3. Consortia Admin also sets up access for other Editors who will work on the state-wide committee, some of whom are already users of other Hyku tenants for their own repository. Some of these Editors will only have access to the new OER tenant, while others will also have access to their own institutional tenant.

4. The Multi-tenant Editor and committee members create an admin set workflow for faculty to request to deposit materials. The committee members perform community outreach to let faculty know of the service.
 5. Faculty who want to deposit material to the OER tenant fill out a google form with various metadata and licensing information. This faculty member receives a follow-up message from the Multi-tenant Editor or committee member who is handling their work to ask any questions or verify information.
 6. The Multi-tenant Editor uploads the material to the Hyku tenant.
5. Sunnydale Community College library is undertaking a project with the President's Office to make the collection of minutes of Board of Trustees meetings available, going back 90 years to the institution's founding. A professor in the history department, who has written a history of the school, is interested in helping with metadata creation. Sunnydale CC is part of a state-based service offering a Hyku tenant to community colleges. They may want to expand their repository to hold other collections in the future.

SCC has:

- Consortia Admin
- Tenant Manager, Editor, and Approver

Workflow scenarios:

- Collaboration with various campus departments
- Direct consortia/tenant relationship
- Possible proxy?

Steps to set up repository:

1. Consortia Admin sets up tenant and gives access to Tenant Manager.
2. Consortia Admin works with Tenant Manager to set up the tenant with the needed customization of theme, admin sets, and worktypes.
3. Tenant Manager works in the library and has the physical collection of Board minutes. Student staff in the library work on digitization.
4. Student staff member is made Tenant Editor. She uploads minutes in batches with a spreadsheet of basic metadata. The collection is not yet published.
5. Tenant Manager then works with the history professor to get them oriented to the system. The professor is also given Tenant Approver privileges.
6. The professor Tenant Approver reviews content and makes adjustment to the metadata identifying authority entries for names of locally important people.
7. Eventually, professor Tenant Approver creates a user profile for their graduate student and the Tenant Manager gives the student Tenant Approver permissions to complete the work on the records under their supervision.
8. Once the entire collection is described, the library Tenant Editor reviews and approves all the works, and changes the collection status to visible.