2024 Midwest Regional Meeting Unconference Notes

9:30-10:05   Unconference block 1

Room 1126 Topic: Strategies for increasing community involvement in shared development

Facilitator: Julie Hardesty
Notetaker: Heather Greer Klein

Notes
- Is there scaffolding in place to get folks onboarded to contribute to code changes or documentation? If so, how can we make it (more) approachable? If not, what do we need to do to get folks more involved?
- Diving into documentation, even to make small edits, is intimidating
- https://samvera.atlassian.net/wiki/spaces/samvera/pages/2212069377/Samvera+Development+Knowledge+Base Samvera Development Knowledge Base - all products here. Getting started page.
- Putting in paths for reaching the GitHub wikis and READMEs
- Hyku for consortia has documentation for Hyku administrators, which is challenging but Knapsack could really help with this. There is also an onboarding toolkit.
- Could we have an open session for walking through documentation?
- Avalon has the Avalon collections guide
- Metadata Interest Group could take on metadata-specific updates - if we can tag those documentation issues with tags for interest groups to tackle
- https://github.com/orgs/samvera/projects/33 Documentation Tasks - GitHub - access to GitHub as a blocker
    - Demonstrated workflow that is welcoming to new folks … What documentation do you need but are not finding on the Samvera KB? Tasks were then created in JIRA to start filling the documentation gap based on NEED!!
- Blockers for code contribution-
    - Knowing if Hyku libraries can help with Hyrax issues - not understanding a lot of jargon (Dassie, Docker, etc). But Hyku libraries could use the Nurax testing sites for accessibility issue testing and other shared interest work.
    - Julie got help for a code change by learning to run Docker locally. That was a huge step. To make an accessibility issue change, Julie tried some things and then worked with Daniel to figure out exactly what to do.
    - Office hours for someone to say, anyone who wants help to work on a code change can come to the office hours for help.
    - Doing a PR is still intimidating for new developers
    - Do we have a glossary for all of the technical language for developer tasks (pull request for example)? And GitHub processes.

- ○ Library carpentry documentation for GitHub processes is excellent, it could be a starting place.
- ○ If you have contributed to community code, what was a catalyst? Institutional support? Often "voluntold" to contribute to the community, have it made a priority locally, sharing a customization back to the community and be a contributor, or recognition about a community role
- ○ Demystifying getting started with coding - a really low bar or a dive in session for non developers to be held periodically
- ○ The word developer can be a blocker

Highlights:
- ● Focus on documentation and code contributions
- ● Documentation Interest Group - using a GitHub project board seems promising
  - ○ Need to work on onboarding people for GitHub and wiki access
- ● Code contribution discussion re. community involvement, how to make things easier for people to join. Consider some language changes to lower barriers to entry

---

Room 2115E Topic: Hyku implementation and demo

Facilitator: Edward Mandity
Notetaker: Rachel Howard

Notes
- ● MUShare
  - ○ Had been on bepress Digital Commons (grant-funded)
  - ○ Ended up moving to Hyku after grant ran out, because PALNI had IMLS grant
    - ■ Much gratitude to Nic
  - ○ Tried to approximate some of the best display, functionality, and structure features of Digital Commons
  - ○ Highlights, recent uploads on home page
  - ○ Majority of work is contributed by faculty + some core collections from students (Doctorate of Nursing Practitioner, Osteopathic Medicine, student posters, student literary journal with back issues going back to 1930s (though current issues not yet on board)
  - ○ Oral history project documenting Sisters of St. Francis at Marian University
    - ■ Hand-transcribed transcript
    - ■ Audio
    - ■ Thumbnail image of interviewee
  - ○ Organized by collections
  - ○ Running through one admin set, only Edward does submissions
    - ■ Volume not high enough to move to self-submission
  - ○ Challenges

- ■ Getting buy-in from different faculty and departments
  - ● Required deposit helps
  - ● Analytics can be helpful (but bepress map has not been recreated)
    - ○ Currently have to contact Nic because analytics is broken since G4 upgrade
    - ○ Email notifications can be set up for something you deposited, but doesn't connect to creator if they weren't the one who submitted
  - ● Awaiting embargo functionality improvements
    - ○ In early days it was manual but PALNI has done some work on automating public view after expiration - will see if it is working properly for Marian
  - ● Sort order not intuitive
  - ● Faculty, especially in Health Sciences, want a module to display profiles with research interests
    - ○ University uses Watermark Faculty Success - may look into integrating it - or building something Hyku-specific
      - ■ Can download works from there, then do copyright clearance and add those that are open access
      - ■ Contact faculty if needing pre- or post-print versions - but low response
  - ● Advertise in newsletter
  - ● Difficult getting into faculty meetings
- ○ Features
  - ■ pdf.js can be toggled on
  - ■ A work can be in more than one collection (e.g. faculty and student if co-authors fall into each category)
  - ■ Default to public but willing to set something to private if requested
    - ● PALNI has done some work with SSO authentication
- ○ Submission process - see [Submission Guidelines](#) document in repository
  - ■ Contact faculty
  - ■ Submission form (paper)
  - ■ Edward's office prints posters and supplies information about repository to those creators

Highlights:
- ● Mostly a demo of MUShare
- ● Helped make people more comfortable w/ Hyku and how to implement it

---

Room 2115G Topic: open

Facilitator:

Notetaker:

Notes
-

10:10-10:45   Unconference block 2

Room 1126 Topic: Preservation strategies for repositories

Facilitator: Michelle Dalmau
Notetaker: Jon Cameron

Highlights for Reporting Out
- Storage versus Preservation: Is replicated, long-term, geographically diverse storage enough?
    - File format migration may be less of an issue today as we have standardized and tend to opt for open file formats when possible
    - Policies help
    - Better start somewhere
- Preservation-levels; approaches to what we can or can't preserve due to resource-constraints; emphasis on born-digital content
- Preservation services for consortia; value-add; needs to be easy for members to manage
- Preservation is resource-intensive: money, expertise, policy-making/administering (and pitfalls when preservation soft-funded)
- Funding preservation needs to be a higher-level mandate; how to encourage buy-in (servers v. stories about collections) ; donors/endowments as options
- Archivematica integration with Hyku (WVU will be exploring this in a grant with SoftServe); Avalon & Archivematica ([see documentation](#))

Notes
- PALNI:
    - Shared Hyku instance, still figuring things out with preservation
    - Worked with AP Trust in the past to pilot exploration of working with AP Trust to put things into a preservation workflow upon ingest into repository
    - Pilot results: it was too complicated, and people couldn't invest the time to work through the complications of getting started with the software
    - Lesson: the software needs to be as easy to use as possible
    - Also work with IndyPres, don't actively steward this but do provide some funding
    - Would love to develop a better strategy in the future

- Amigos: no digital preservation strategy general workflow right now
  - Very interested in what others are doing
  - Can these workflows be made simpler, so it can also be more broadly accessible when provided at the consortial level?
- Working with a service is a common option because it's so expensive and complicated to preserve content
- Push-button preservation can also fill up expensive space necessarily, so gatekeeping policy will need to be applied regardless of context
- WVU Libraries
  - Haphazard preservation so far with part of the collection not actively preserved
  - Congressional archives from grant funding are in Preservica
  - Looking for a strategy to use across all material
  - The concerns and cost that come with AV material are much greater than with other materials, and that's a challenge
  - Tape storage and locally managed server; more cost effective to mix services between cloud and local instead of contracting with a vendor
- Heather Greer
  - Worked previously on DuraCloud and talked with many libraries concerned with preservation
  - Everyone still feels like they don't have the right preservation strategy
  - The failure of projects like DPN is also a factor
  - Questions about how to package material for preservation are evergreen
  - Many approaches are valid when thinking about preservation strategies
  - Running out of grant money is also a common reason preservation efforts get put to the side or out to pasture
  - In a paper from Chronopolis, they tried to put together a preservation system and documented the failures
- Asks for funding have to go beyond the libraries in a lot of cases, and buy-in from top level administration is necessary
- Never heard of a model where digital preservation is marked as important from the top down
- To do digital preservation right, you need a detailed workflow with buy-in from everyone (and money)
- We can't afford to do it all
- It's hard to sell server space and other tech needs for digital preservation to donors
- Scanning as Processing efforts, where there's a lot of material that never needed to be digitized but are still existing digital objects
- https://nathantallman.com/research/appraisal-and-selection/
- No need to consider preservation copies of content already in the repository where the master already exists elsewhere and the repo only has derivatives… but born-digital content freshly uploaded does need to be preserved
- Rescanning material is unavoidable sometimes; there will always be the need to supplement existing digitized documents if they won't satisfy preservation needs
- Best practices are elusive

- NDSA levels of preservation - "don't make the perfect the enemy of the good"
- Communicating to users about preservation vs just storing a file is another challenge
- Periodic evaluation of content in preservation services is another basic concern
- Jim notes that open file formats are the best ones to use for preservation
- Format normalization is an expected part of storing files for long-term use
- Grant funded to explore integration with Archivematica and Avalon; ingest into Avalon and push to digital preservation
    - Archivematica leveraged the Avalon API
    - Avalon has a simple file management strategy, doesn't get packaged in preservation container
    - Middleware layer to create preservation files for packaging
- WVU
    - Softserve contract for Hyku; exploring Archivematica integration (especially for born-digital content)
- Increasing costs of cloud storage services are a concern
- In the cloud costs can also be an issue when bots or other machines are making large amounts of requests
- Congressional archivist at WVU—as a library, how can we support a request to provide materials as a website, or directly web accessible?

Room 2115E Topic: AI integration into repositories

Facilitator: Emily Lynema
Notetaker: Kirsten Leonard and Megan May

Notes

- What is AI?
    - Any machine learning is AI
    - [Transkribus](#) - handwritten transcription (HTR: handwritten text recognition) in multiple languages, jpg or png, up to 100 pages a month for free
        - Example 19th century german handwriting, and did it amazing
        - Needs decent handwriting
        - [Co-op, owned by lots of university and libraries](#)
    - [Whisper](#) is used at IU for audio transcription
        - WCAG 2.1 supposed to be audio description of visual content in videos. What is important to describe for different types of users and research needs.
- What use cases do we have for AI in repositories?
    - Transcription of hand written documents (HTR)

- - - Luna - Echo Labs - accessible video captioning and audio description, applies to screen readers as well https://el.ai/
    - Accessibility
      - support to create metadata for imagery - Utah did some research
      - Alt text
    - IR
      - Sort large data ingests, metadata creation, duplicates, what's important, PII redacting,
    - Northwestern project First, the project will build an installable, open-source, semantic discovery product that allows users to chat with library and archival collections. Second, the project will test and validate a toolkit to augment metadata for digitized collections.
    - Born digital document description - looking through a hard drive of data or an email donation to archives (maybe also looking for PII, but other tools, like from Stanford, do that sort of thing and it might not be AI-based)
    - Library of Congress Labs did a project on using AI to describe E-books: https://www.loc.gov/aba/pcc/documents/OpCo-2024/Potter-Saccucci-Machine-Learning.pdf
- How might AI be useful? How is anyone already using AI in their repositories?
  - AI4LAM (website, GitHub org) (Libraries archives museums)- slack space (ai4lam.slack.com)
  - Finding AI in scholarship Acedem-AI
- Collections as Data Group - data sets that people can create research
  - Use of our collections and metadata data sets for researchers using AI tools
  - Use of our data sets for researchers/companies building AI models
- What AI tools should we be looking at?
- What concerns do we have for use of AI in repositories?
  - Do we want to have people use our collections as data with AI tools? If they are using them to train models and make money?
  - What about creators that don't want their content used by for profit companies
  - Bandwidth/hits on our collections servers
  - Energy usage to for large scale computing - and is it worth it? Training vs query costs.
  - Education power usage is small compared to other uses, could serve as an educator of AI to the world.
- Library of Congress AI Implementation Governance & Policy
- Ai4lam - AI for Libraries, Archives, Museums
  - Email list - https://groups.google.com/g/ai4lam
  - There is an active Slack workspace (invite link?)
  - Host a conference annually - Fantastic Futures 2024 is in Canberra, Australia
- AI for Academic Librarians Community of Practice (AI COP)
  - This community is participating primarily via Discord: Discord invite link
  - Watch (or re-watch) the kickoff meeting: For those who would like to watch a recording of the first session, you can access it here.

- ○ AI COP will be hosting 10 discussion sessions over the next three months, with the aim of turning the notes and conversation outcomes into a white paper. We'll be discussing (A) *Teaching & Learning, (B) Ethics & Environmental Impact, (C) Practical Applications + Research Support, (D) Keeping up w/ AI Developments + AI Platforms, and (E) Copyright and IP + Policies and Guidelines.* We ask that each AI COP member interested in participating please sign up for one session only (we hope to be able to open up for more discussion opportunities soon). Sign up for your discussion session here!
  - ○ AI COP Organizers
    - ■ Emma Slayton, Data Education Librarian, Carnegie Mellon University Libraries
    - ■ Rebecca Fordon, Reference Librarian & Adjunct Professor, The Ohio State University Moritz College of Law
    - ■ Michael Flierl, Fellow at the Information Literacy Institute at Purdue.

Highlights:
- ● Talked about examples of tools, use cases
  - ○ Handwritten text transcription (e.g. Transkribus), audio transcription (e.g. Whisper), audio description (e.g. Echo Labs Luna)
  - ○ Image description (alt text for accessibility)
  - ○ Metadata creation, processing of born-digital materials
  - ○ Conversational search experience (e.g. Northwestern's work with RAG)
- ● Concerns about harvesting of content from repositories by commercial AI companies
- ● Communities:
  - ○ AI4LAM
  - ○ AI COP (links above)

Room 2115G Topic: Deployment environments

Facilitator: Chris Colvard
Notetaker:

Notes
- ● Avalon deployment
  - ○ Containers via podman
  - ○ Capistrano
  - ○ AWS bootstrap via terraform
- ● IU Repository Services (non-Avalon)
  - ○ Dev/test activity on library managed servers

-
  -
    -
      - Containers via podman
      - Orchestration tooling is mostly home-grown scripting
    - Production is managed by central IT (UITS)
      - Docker Enterprise
      - Deployments are somewhat manual
  - University of Cincinnati
    - Capistrano
    - Scanning Environment
    - Github Actions
    - Interest : AWS (EC2/Lambdas), Landos, Dockerization
  - OSU
    - Deploy to AWS
    - Interest : Deploy Hyrax to develop on, Docker, GithubActions
  - Continuous Deployment
    - Github Actions
      - Building container images and pushing to storage
    - Webhooks
      - Homegrown python script listening to Dockerhub events
      - https://github.com/adnanh/webhook listening to Github events
  - Container Storage
    - Dockerhub
    - Github Container Registry
  - Configuration Management
    - Environment variables
    - Secrets files
  - Challenges
    - Troubleshooting through layers of management that don't have full access to system (developers/devops/hosting service)
    - Configuration management
    - Development environments
      - Debugging in containers
      - Lando might be helpful for hyrax
    - Solr dying frequently in AWS for nurax
    - Rigid production deploy schedule due to scanning and audits needed
    - Bot scanning - SiteImprove, AI, etc.
    - Bundler, yarn, rvm, nvm,... versioning.

Highlights:
- Discussed various deployment environments that people have
- Environments: Docker, Capistrano, AWS tooling
- Continuous deployment tools
- Challenges:
  - Various levels (Developers, devops, infrastructure layers) - don't necessarily have access to all info

- ○ Debugging in Docker
- ○ Lando could be useful tool for Hyrax dev envs

10:50-11:25   Unconference block 3

Room 1126 Topic: Addressing challenges collaboratively: local and community challenges that could be addressed by working together

Facilitator: Heather Greer Klein
Notetaker: Amanda Hurford

Notes
- Continuation of conversation from the first session on strategies for community involvement in development
- In other communities, what are some collaborative activities/aspects that you really loved or thought worked well?
  - Getting folks together to address a challenge helps them feel like they are not alone
  - Social time, relaxed gathering helps to support a cohesive community
  - Communication tools
  - Breaking big work into smaller chunks
  - Engery in interest groups?
- How do you hear about Samvera activities? Is there something that you missed out on?
  - Email and slack
    - Slack notifications can get missed if you don't visit often, IU has to use teams
    - Emails can be missed too
    - Confusion about where to check, and where to post? How to reach everyone?
    - SMIG's communication practice is the gold standard
  - Calendar
    - Need to make sure that groups are putting meetings on calendar
  - Mention meetings at other meetings, Interest groups, partners
  - GitHub has a discussion function too
  - Wiki banner
- How could the Wiki be improved?
  - Update old stuff
  - Documentation interest group will be suggesting improvements

- - - Can we streamline the process and template for pages?
- Samvera now has a google drive, should probably create some recommendations about where to store notes - SMIG puts in both google doc and wiki page
- Facilitation instructions help in meeting agendas
- PALS uses basecamp to share out announcements - sometimes hard to know what to share
- Need clear access to the most uptodate technical documentation
- Connect the github wikis to samvera confluence wiki
- Documentation Interest group has representation from developers
- How to propose an interest group and/or working group?
    - [Instructions on the wiki](#)
    - Write a charter - 3 people from different institutions
    - Set a kickoff date
    - Define sunset criteria
    - Working groups fix a certain problem with defined sunset - often come out of other groups
- Samvera calendar here: https://samvera.org/news-and-events/calendar
- How to be more welcoming/mentoring?
    - Samvera open house sessions
    - Announce this widely

Highlights:
- Action items for Heather and Outreach & Engagement group
- How do people learn about things in the community; how do people miss out on things?
- Office hours idea
- New Samvera community calendar on wiki/website

Room 2115E Topic:

Facilitator:
Notetaker:

Notes
-

Room 2115G Topic: Avalon in the future: features, development, and governance

Facilitator: Emily Lynema
Notetaker: Jon Dunn

Notes
- Questions about Avalon?
- What features would you like to see developed? What problems do you need to solve?
- Interested in whether Hyku / Avalon integration is possible
  - How does Avalon sit on top of Hyrax?
- Avalon not currently built on Hyrax
- There was an effort to build Avalon into Hyrax, which resulted in a couple of gems, but efforts shifted back to Avalon as it is
  - One gem for creating derivatives
  - AV content in IIIF
- Some amount of additional work (probably not that much that) could help Hyrax work better for AV content
- Avalon can support multiple units who each manage their own collections, access controls, etc. Examples: IU MCO https://media.dlib.indiana.edu, Big Ten Academic Alliance (future)
- PALNI: Minority of institutions would have use for Avalon but some have larger amounts of AV content
- Ramp: Media player component library is a IIIF player that works with AV materials and can be used in repository systems other than Avalon (in lieu of UV for example): https://github.com/samvera-labs/ramp
- Hyku doesn't use HLS streaming - could be things from Avalon that are useful there
- Avalon can use AWS services to do transcoding (AWS Elemental MediaConvert) and streaming (CloudFront)
- UV doesn't support HLS streaming (as of last testing 1 year ago)
- Who contributes to Avalon now?
  - Originally developed by IU and Northwestern
  - 15+ users
  - Many are small institutions, not currently contributors or Samvera members
  - Most development is from Avalon
  - Occasionally get contributions from some users
  - Few users of Ramp outside of Avalon; one contributed a major feature back
  - Some institutions have paid IU to do work
  - IU may not always be able to put same priority on Avalon as it does today
- Working on moving off Fedora 4 to Fedora 6 (w/o Valkyrie)
  - SoftServ hosting Hyku is moving over to Postgres; not interested in supporting Postgres
- Future features

-
  - ○ Improved management of items and permissions
    - ■ Bulk editing/metadata assignment
    - ■ More use of information in media container files when it gets processed (e.g. track information in audio or video file)
    - ■ Keeping pace with IIIF standards development (e.g. Auth, player interoperability)
    - ■ Performance and UI improvements
    - ■ Admin dashboard
    - ■ LTI 1.3 upgrade

Highlights:
- ● Discussed needs for Hyku users for AV support; ways in which Avalon could be leveraged to help
- ● Small changes to Hyku/Hyrax to improve out-of-box AV support
- ● Code contribution, future plans

11:30-12:00   Unconference block 4

Room 1126 Topic: IIIF tools and implementations

Facilitator: Randall Floyd
Notetaker:

Notes
- ● Seed topic suggestion: Is there a future intersection of Hyrax and the [Clover IIIF front-end toolkit](#)?
  - ○ Could it at least be a supported choice?
  - ○ Or maybe a better question is, how can we offer a choice of viewers?
    - ■ The advent of the multiple viewers out there is inherently indicative of their speciality (UV, Ramp, Clover, Mirador etc.)
    - ■ Ramp: AV (https://github.com/samvera-labs/ramp)
    - ■ Mirador: Comparative Analysis
    - ■ UV: All purpose, feature-rich

- - ■ Clover: Web component-based, can compose page-oriented viewers from "primitives" at a granular level
    - ○ People may even want specialized viewers' behaviors tied to work types or collections.
    - ○ Clover is from Northwestern University so possibly tied closer to Samvera Community
- Accessibility of IIIF viewers - are they rated that way or is there info about the accessibility of different viewers?
    - ○ Ran the Clover demo with SiteImprove; generated WCAG levels A & AA errors
    - ○ Clover and RAMP both claim a certain level of accessibility; UV has active work happening; unclear if all viewers are expressing current status of accessibility
        - ■ No VPATS
    - ○ Embedded metadata from media files - possible to use that in viewers? Maybe IIIF annotations could use that, but there all sorts of metadata that can be in sidecar info
- Improvement of Hyrax's support for various IIIF frontends and servers has been a tech lead wishlist item.
    - ○ Would like to see the ability for an institution to select a list of viewers to be made available to users. Users would then be able to choose which viewer they use. A default viewer can be set per work type.
    - ○ Provide a better IIIF server solution than riiif. Perhaps a container running serverless-iiif?
- UV is a footprint; Clover makes it possible to build pages with primitives
- Clover could provide for an easy way to instantiate different page types for different media
- Having more dependencies is an acceptable downside to multiple viewer support
- Slowness can be an issue with multi-page objects; any IIIF viewer would ideally be quickly loaded
- RAMP also exists within Samvera for audio/video
- IIIF Manifest as important as the Viewer; the manifest allows the interoperability and allows for research and pedagogical use cases
- There isn't a IIIF Interest Group in Samvera…. yet

Highlights:
- Discussed ability to choose/use other viewers
    - ○ Possibly drive viewer choice based on content type
- Do manifests contain enough content, are they discoverable easily enough for IIIF interoperability with other tools
- More formal connections between Samvera and IIIF communities?
- Possible IIIF interest group in Samvera

Room 2115E Topic: Hyku in the future: all the features you'd love to see

Facilitator: Amanda Hurford
Notetaker: Emma Beck

Highlights:
- Reviewed current features and fixes in progress: notifications, sword, Allinsonflex, bulkrax improvements
- Brainstormed desired features: top 3
  - Exploring Avalon feature integrations
  - Questioning Authority ([gem](#))
  - Ability to reorder fields per tenant
- Noted lots of overlap with Hyrax needs and plans to strategize alignment

Notes
- In progress
  - Lots in the pipeline is University of Pittsburgh sponsored content
    - Can be notified via email of downloads, views, and process (approval etc) - hope to help adjust workflows and get closer to Digital Commons and their workflow. Still figuring how to connect author to work
    - SWORD - automatic ingest of custom type
    - Improvements to bulkrax - indicate if object is embargoed on ingest
    - AllinsonFlex (working with Amigos) - upload and download using YAML file, works on collections and work types, not quite on work types. UI was/is supposed to be part of that, but could be a later project
    - Google analytics dashboard fixed -
- Individual brainstorming
  - Christine
    - Automatic timing for leases and embargoes +2
    - Backend Dashboard - 2 sliders are problematic; too thin to grab +1
    - Streaming +3
    - Be able to drag and drop sections on public UI side to create new/modified interfaces +2
  - Kirsten
    - AI search enhancement
    - Improved integrations with DOI minting +1
  - Edward
    - researcher profile module or integration +3
    - Exploration of Avalon integration? +5
    - Improved sorting / facet customization +3
  - Emma -
    - UofL currently has - SLUGS +2, newspaper integration+3 (transcription, end user interactions)

- - - ■ Would like to see - better sort options, better facet/page flipping+1, speed, default results listing (better labeling and better relevance) +1, easier to upgrade, loading sign +!
    - ○ Amanda:
      - ■ Google Scholar optimization +1
      - ■ Integration with ORCID and/or public profiles +3
      - ■ Better handling of contact form +2
      - ■ OAI by collection Better OAI-PMH management for connection to other hubs +4
    - ○ Jessica
      - ■ More integration with other common archival tools like ArchivesSpace, ArcLight, Archivematica +3
      - ■ Easier configuration of incorporate Questioning Authorities? +5
    - ○ Evan
      - ■ IP address restriction +3
      - ■ Next button for viewing next item in compound object +2
      - ■ Ability to remove/add facets on home page when using cultural heritage template +3
      - ■ Ability to reorder metadata fields on work pages (might be part of flexible metadata update?) +4
      - ■ Potential customizations for collection home pages +1
      - ■ Bug fix: if HTML is used on description field to customize collection home page, the code displays in gallery search +1
    - ○ Jen
      - ■ Better back end documentation - especially user permissions and admin set functionality +3
      - ■ Add to collection bug
      - ■ Crosswalk between - OCLC digital collection gateway +1
      - ■ Slowness for videos

- ● Also think about adding accessibility features - alt text field, accessibility checker

---

Room 2115G Topic:

Facilitator:
Notetaker:

Notes

-

1:00-1:35   Unconference block 5

Room 1126 Topic: Hyrax in the future: features, design patterns, and development needs

Facilitator: Heather Greer Klein
Notetaker:

Notes
- Individual Brainstorms
  - Julie
    - Incorporate [Bulkrax](#) as part of Hyrax +5
    - More configuration options (turn off depositor details) +2
      - Employee username should not be shown (in the digital collections use case; maybe less so for IRs)
    - Better/easier to use branding options (overall and collection level)
    - Offer alternative to PDF download (accessible download)
  - Jim
    - [AllinsonFlex](#) fully integrated +6
      - In progress with SoftServ
  - Michelle
    - More configuration options (i really want to re-order the display metadata fields) +2
    - Access controls (like Avalon) +3
      - IP ranges +2
      - LTI for Learning Management System integration +3
      - LDAP / SAML attribute group
  - Daniel
    - Flexible IIIF viewer options; better IIIF server +2
      - Allow users to select a IIIF viewer, etc.
    - Audit log of changes to objects +5
    - More robust users list
      - Would [samvera-persona](#) fulfill this need?

- - ■ Redesigned locale selection (without use of URL parameter)
    - ■ Solr query tool or reports tool +2
      - ● Does OSU have this? 2
  - ○ Jon
    - ■ [SWORD](Does Hyrax already have a working SWORD implementation) or other deposit API?
      - ● [scientist-softserv/willow_sword](link) is included in hyku
    - ■ Sitemap generation (Does Hyrax already have this??) +1
    - ■ More robust AV ingest/delivery support +1
  - ○ Randall:
    - ■ Engineer continual accessibility checking into the QA and/or code testing +3
      - ● Help catch breaking accessibility offenses before they are added into code
    - ■ Collection level IIIF response +3
  - ○ Anna
    - ■ Allinson Flex integration
    - ■ Language attribute tags for metadata fields - mentioned in a SMIG meeting
    - ■ Other sorting options for search results, e.g. title (see https://github.com/samvera/hyrax/issues/3558 and https://github.com/samvera/hyrax/issues/4308) - discussed in SMIG +1
    - ■ Add custom thumbnails to works (https://github.com/samvera/hyrax/issues/6848) - discussed in SMIG +2
    - ■ Alt-text metadata field for file-level
    - ■ EDTF support (see https://github.com/samvera/hyrax/issues/5079)
    - ■ Advanced search options with Blacklight, e.g. title +1
    - ■ More AV support in Hyrax
  - ○ Chris
    - ■ Plugin architecture for easier extension/customization +1
      - ● Customizations that are general and can be used by other people
      - ● Hooks to add feature flipper and configuration panel for plugins
    - ■ Multilingual metadata support (ability to enter descriptive metadata in multiple languages) +2
    - ■ API for building JS frontends +2
  - ○ Thomas
    - ■ Merge/Fix Statistics and Analytics for GA4 +3
      - ● Should be in next Hyrax 5 release
    - ■ Improve BrowseEverything to use OneDrive
      - ● Avalon has some use cases for Microsoft Graph (OneDrive, Sharepoint) integration and is working on this in a local fork that we will hopefully be able to commit back upstream
    - ■ Ability to list Authors in specific order on Works+1 (SMIG - see https://github.com/samvera/hyrax/issues/4781)

- - ■ More [rake] utility tasks (for Preservation, Large File ingest, upgrades,...)
    - ○ Bulk edit improvement (Julie) - more fields bulk update-able (added fields via AllinsonFlex, for example); better updating so more than 50 works can be updated in a single bulk action

Highlights:

- Overlap w/ Hyku in the future discussion
- Some key areas discussed:
    - AllinsonFlex
    - Access controls
    - IIIF viewer
    - Better documentation; sometimes not clear whether features exist or whether they work
    - Metadata related needs from SMIG
- Wrapping up Valkyrization will let us look at what's next
    - Roadmap ALignment Group important to look at synergy across products

---

Room 2115E Topic: Accessibility - changes to get to WCAG 2.1/2.2 AA

Facilitator: Christine Peterson
Notetaker: Emma Beck

Notes
- [WCAG 2.1: Comparison with WCAG 2.0](#)
- [WCAG 2.2: Comparison with WCAG 2.1](#)
- **Doesn't seem like a huge leap**
- Testing on other repositories - Digital Commons also has problems
- **How much is on the tools versus on the depositor/managers** - PDFs seems a large problem
- Accessibility testing on instances
    - UofL - yes and some edits have maybe made it into core, bepress issues - mostly with PDFs
- **Department of justice** expectations
    - Outside people so didn't use archives in the way that we do
        - Archived content vs archive content
    - Some lib collaboration with library of justice to have some examples
    - Need to fix when you edit the records - "as needed" though we're unsure if that is actually allowed

- - ■ If added after April 2026, is it fully compliant (see webinar by Deque at https://www.deque.com/resources/type/webinars/?deque_category_limiter =accessibility-matters)
  - Work in Hyrax right now to get it up to 2.0
    - Should be looking at 2.2
  - **Avalon has had captioning for a while**, recently added transcripts which aren't guaranteed to be accessible.
    - "Request a transcript" would be a nice option
    - UNC Example - https://cdr.lib.unc.edu/concern/dissertations/7m01bz34z?locale=en
  - **Once you remediate, where do they go? IU has a request submission form that is about to go live**
  - **When requesting funds, build in money to make it possible when undertaking the process**
  - **Anything we can do to make Samvera accessible?**
    - **Make accessibility testing a part of development**
    - **Needs to be an alt-text field**
    - **Can there be a prompt to check for accessibility? A plugin?**
  - Penn State accessibility testing: https://accessibility.psu.edu/testing/testingtools/
  - Recommend reading book by/following Haben Girma (https://habengirma.com/)

Highlights:

- Going to WCAG 2.1 or 2.2 not as heavy a lift as going to 2.0
- DoJ new rule
  - How much does this impact the tools vs. the content / people putting things in?
- When content is remediated, where does it go?
- When getting funds for grant projects, build in funding for accessibility (transcription, etc.)
- How can Samvera be more accessible?
  - Make accessibility part of development
  - Alt text fields
  - Samvera feature to check accessibility of document content

---

Room 2115G Topic:

Facilitator:
Notetaker:

Notes

1:40-2:15　　　　Unconference block 6

Room 1126 Topic: Community sustainability: what Samvera does now, and what we could do next

Facilitator: Jon Dunn
Notetaker:

Notes
Some possible discussion questions:
- What does Samvera (as a community/organization) currently do to maintain engagement
  - of partner institutions?
    - Heather does partner health monitoring on a regular basis (ex: who's participating in Slack)
    - Lots of engagement with partners lately. Ex: all bills paid on time this year.
  - of individual staff at partner institutions?
  - of non-partner institutions/individuals?
    - Approaching institutions directly to discuss partnership
    - Discuss on-ramp for non-partners ("supporters" or "builders" to contribute even before/without becoming partners (contributing funding and/or code)
    - Some documentation about why institutions should fund open source does exist
- What is Samvera looking at doing?
- What could Samvera do in addition?
  - Who needs to hear - if you are relying on open source for critical infrastructure for your organization, you need to budget for at least several $$ a year to support the community that is supporting the software
    - Push this message at CNI, ARL, places where administration are present
  - Potentially some kind of communication toolkit ex: "if your administration is considering pulling the plug on open source" etc.
  - Case studies about how institutions think about, approach, budget open source. Total cost of ownership type model. Ex: Consider travel as part of cost of repository.
    - Some folks have been interested in Samvera for a long time, but haven't been able to sell full membership. Vended software has a clear price tag;

open source requires people costs, and it's hard to express that cost. Can that be part of a case study or toolkit?
- Help admin understand why it's important to have local dev. Being part of Samvera can help train local devs.
- Feature comparison of Hyrax to DSpace, ContentDM
    - West Virginia did this as part of their research
    - PALNI says they have done this in the past and think Hyku is close to parity
    - CottageLabs thinks that Hyrax code is not more complex than Invinio code. Could this assessment be shared?
- Perhaps there could be a CNI presentation to talk about case studies on comparing costs, etc?
    - Example document from MetaArchive re. Digital preservation: https://metaarchive.org/wp-content/uploads/2018/12/ma_20costquestions_2018.pdf
- Excitement around development at every level. Hope that features can be implemented. Hyku has changed significantly over the past few years. Institutions can influence features.
- Get leaders to question their assumptions [about open source]
- "Problem summits" - bring people together to work on a problem ex: accessibility
- Is there a way to salvage partners that are drifting away?
    - Crisis team to help talk admin off the ledge
- Funding push could be a way to raise $$ both within and outside the community (both existing and potential future institutions)
- Can grant funders start to fund more operational costs; not just initial dev / research / implementation?
- Dev applied to bespoke systems should be applied to samvera! This would really help. Even if you must build your own thing, can it be built within samvera.
    - Ex: Northwestern (?). They are still contributing code back to Samvera (clover, serverless-iiif)
- What new or currently-unfunded roles are needed?
    - Tech lead was a proposed full-time position adjacent to Heather's position. However, partnership fees never expanded to support this. Would need to more than double our budget to bring in a central tech lead.
- Is the push to bringing dev staff into central IT impacting organizations' willingness to adopt open source?

Highlights:
- Talking partner and org level as well as individual level
- Board keeping track of partners and finding new partners, understand when partners become at risk of leaving
- Open source sustainability - who needs to be convinced of value and what does it really mean to choose open-source

- CNI prez possibility - how institutions look at adopting open source
- Are grant funders interested in sustainability and maintenance?
- Tech Lead and Community Lead needed in Samvera Community but likely doubles budget

---

Room 2115E Topic:

Facilitator:
Notetaker:

Notes
-

Room 2115G Topic: Hyrax upgrades and troubleshooting

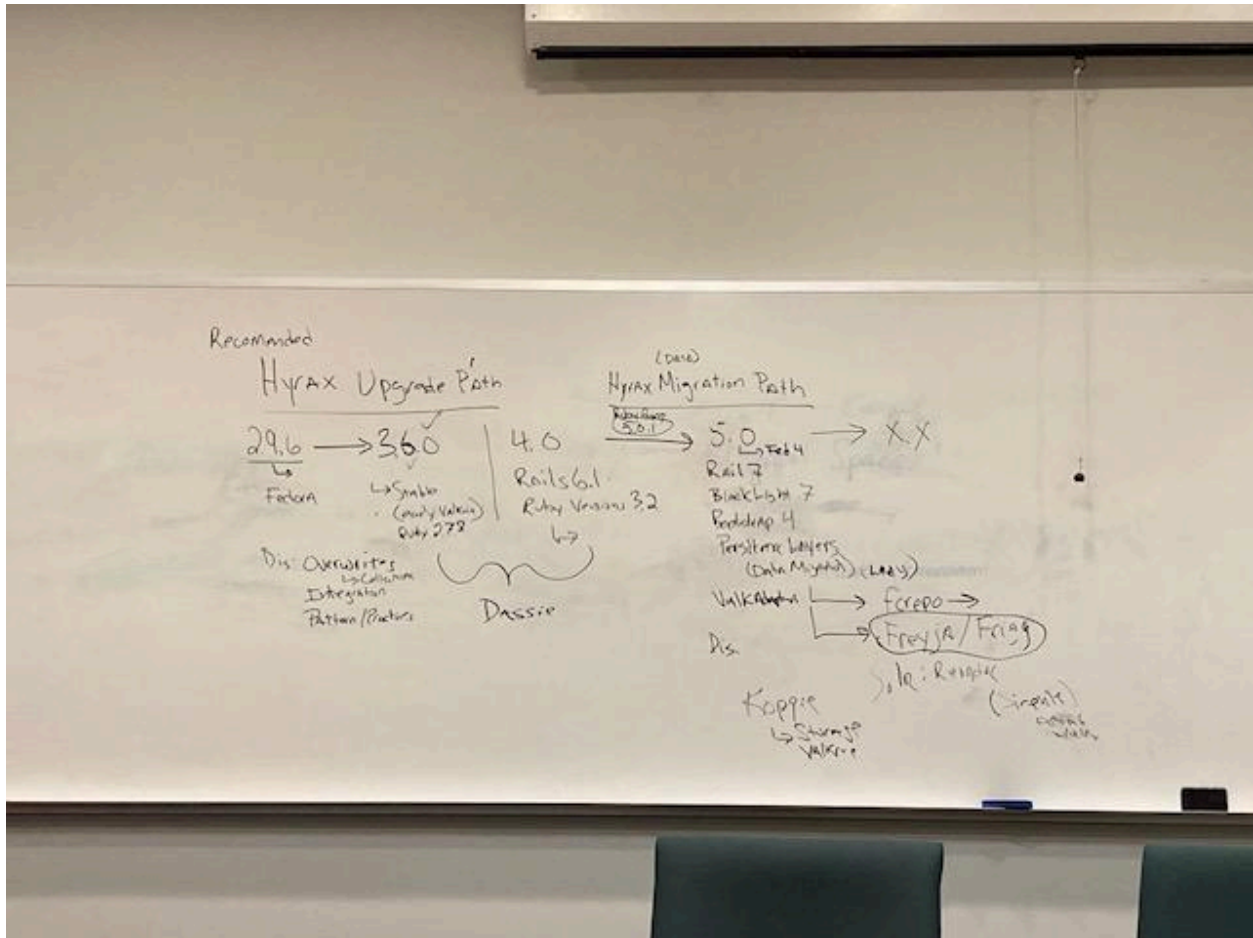Facilitator: Thomas Scherz
Notetaker: Julie Hardesty

Notes
- What versions are folks using?
  - End of life push on ruby on rails is a lot of the push right now
  - Hyrax 2.9.6 - Fedora heavy; no valkyrie
  - If talking upgrade path, Hyrax 2.9.6 → 3.6.0 | 4.0 |5.0
    - What do you get in Hyrax 3.6.0?
      - Stable Fedora release (4)
      - Experimental Valkyrie
      - Some hunch that this is easier to go to than jumping versions
      - Metadata schema changes
      - UV changes to yarn install
    - What do you get with Hyrax 4.0
      - Rails 3.2
      - Ruby 6.1 (support drops off in a few days)
    - What do you get in Hyrax 5.0

- Rails 6.1
- Blacklight 7
- Bootstrap 4
- Specialized Valkyrie persistence adaptors (lazy migrations) - tries to read data out of new data store (Fedora 6 or Postgres), if it isn't there, falls back to Fedora 4 using ActiveFedora (old storage); then migration is scheduled as a job for that data
  - Freyja (to Postgres) and Frigg (to Fedora 6)
- So you can connect Hyrax 5 to Fedora 4 and use this behind-the-scenes migration tooling to move data over to Fedora 6 or Postgres
  - Why not go to Hyrax 5?
  - At which point would it be a migration vs upgrade?
    - Persistent layers is where you would need a data migration
- What is the supported version(s)?
  - Hyrax Maintenance Policy - https://github.com/samvera/hyrax/blob/main/documentation/MAINTENANCE.md
  - "Supported versions are the highest currently released X version and then backwards to X-1. So when Hyrax 4.0 is released, the latest Hyrax 3.y is supported but Hyrax 2.y is not."
  - EOL "End-of-life versions are X-1 versions behind the highest currently released X version. So when Hyrax 4.0 is released, Hyrax 2.y is end-of-life and no longer supported, but Hyrax 3.y is still supported and is not end-of-life.."
- Hyrax 3.x and 4 - internal test app Dassie (Fedora 4 with ActiveFedora)
- Hyrax 5 - internal test app Koppie (Postgres with Valkyrie), internal test app Sirenia (Fedora 6 with Valkyrie)
- Javascript frameworks - how is this being tested? There is a JS testing framework in code (Karma) - JS has dependencies (like Ruby has dependencies)

Highlights:
- "Get your app to 5!!!"
- Lots of people still at 2.9.6
- EOL for Rails version
- Good news! Hyrax 5 can support existing Fedora 4 repo; tooling to migrate to Valkyrie + Postgres or Fedora 6

2:20-2:55   Unconference block 7

Room 1126 Topic: APIs and modern frontends

Facilitator: Chris Colvard
Notetaker: Emily Lynema & Megan May

Notes
- Showed a couple of examples of React components using the Blacklight API

- - MCO has a 'collections' page that shows collections metadata and items and allows search within a collection that is based on Blacklight API
      - https://media.dlib.indiana.edu/collections/
    - Hyku react component that calls out to Hyku API to show items in a collection
      - Example: https://commons.pacificu.edu/
      - https://github.com/samvera-labs/hyku-api
- Does Hyrax have an API that could be leveraged to feed a custom React front-end or component?
  - Json response format for a work
  - Hyrax does not have a defined API, except for Blacklight API
- GraphQL
- What are others doing?
  - Univ of Cincinnati Hyrax 2.96 API commit; API docs
  - Developed API for basic CRUD functionality; use mostly to load large files via scripts. Ex: 200G file
  - Avalon API has been developed fairly ad hoc; returns some but not all info in the object. Use to create and update items in Avalon mostly. Would like to standardize this across all routes in Avalon.
  - How much does the need for API to deposit content compare with SWORD 3 for deposits?
  - Blacklight API already provides a lot of search/read access. IIIF also provides at least some access to individual items, in addition to json responses. Can Blacklight API point to IIIF in a standardized manner?
- What use cases would you like to support? Do they support the creation of a well-defined API for Hyrax/Hyku?
  - Faculty want to be able to pull in content to professional portfolios
  - Scripts to load content
  - Pushing content in / pulling content out
  - OAI-PMH
  - Integrating repository search results in other systems
  - Pulling data into exhibit software
  - Ship a handful of web components with Hyrax that could be easily re-purposed. Like a Hyrax component library. Easier build of custom interfaces that could be better maintained over time.

Highlights:
- Looked at existing examples using APIs w/ React components to create dynamic front-ends
  - Blacklight API
  - Hyku custom front-end / Ubiquity API gem
- Use cases for various APIs, what people are doing with them
  - Cincinnati ingest API used in scripts
  - Avalon REST API for scripted ingest, updates
- Should we look at SWORDv3 instead of custom ingest APIs?

- Other use cases
- Possibility of Hyrax shipping w/ set of web components
- GraphQL endpoint for Hyrax?

Room 2115E Topic:

Facilitator:
Notetaker:

Notes
-

Room 2115G Topic: Hyku governance strategy & Sustaining Hyku grant activities

Facilitator: Kirsten Leonard, Amanda Hurford
Notetaker:

Questions:
- What is distinctive about the profile of the Hyku user community, when compared with others in Samvera? How does that influence what users need from the Hyku community?
- What is not working as well as you want? Or what marks an unsuccessful open source community?
  - What community gaps exist (not technology)?
  - What's preventing you from doing more?
- What does the Hyku community's success look like to you?How will we know we are a successful community?
  - How might we leverage our distinctive strengths & differences?
  - What are the markers of shared and sustainable success?
  - How should we evaluate ourselves?

Notes
- Heather -
  - Easy to onboard, learn about the platform, ask questions and identify service providers. Easy to understand the commitment. NOT sales-y feeling, not corporate feeling. Feels like the community is an extra set of hands to help, not an adversary.
  - Reasonable pace of change - regular updates but not constant change
- Emma -
  - Ease of use that leads to increased implementations
  - Minimal customizations
  - Straight forward upgrades
  - Collaborative development
  - No stagnation
  - Diversified knowledge
  - Make core code really strong to minimize the need for customizations
- Christine
  - Everyone contributes, e.g., time, money, expertise
  - Engaged volunteers working on specific areas, e.g, documentation
  - Shared documentation/videos/support pages for the community version
  - Community decides development direction
  - Paid part-time community manager/product owner that works with development team and Samvera
  - Paid part-time developer just for Hyku; priorities set by community; led by community manager/product owner
  - Community engagement across Samvera groups and software, e.g., Hyrax sprints, Samvera Metadata Interest Group, Hyrax/Avalon Interest Group
  - Successful and constructive relationships across libraries, non-profits and for-profits
  - Point releases should come out soon after a release to fix bugs and should be a priority
  - Clear way into the community
- Jessica
  - A successful community would incorporate users of Hyku of all types, including hosted and hosting institutions, large, small, academics, public libraries, etc.
  - There would also be clear information about who is doing what development work either at a particular institution or via a service provider including what features are being worked on and prioritized. (This has been happening at this meeting which is awesome!)
  - I think Rob mentioned the possibility of having a more formal product owner/tech lead system like Hyrax and Avalon have, which I think might help with communication, feature prioritization, etc.

- - - ○ Coordination with Avalon and Hyrax development when it makes sense.
    - ○ Transparency of who is working on what
    - ○ How to align with Hyrax and Avalon
- ● Amanda -
    - ○ Agency for users - features get suggested and implemented
    - ○ Longevity - not going away after initial buzz
    - ○ Well organized - we all know when to meet, how to submit ideas, what's happening
    - ○ Less siloing of development
    - ○ Options in the developer/service provider space
- ● Kirsten - plus Report out notes
    - ○ Success:
        - ■ Multiple entities are contributing all the different types of expertise
        - ■ We are efficient in building new code and capacities in personnel time, and in total cost of ownership
        - ■ Each institution or project's needs are respected but we try to work together and reduce duplication of effort
        - ■ Expertise is being created on an ongoing bases rather than relying on a few contributors only
        - ■ There is trust amongst people participating in Hyku community and development
        - ■ We leverage the staff in Hyku user libraries and create broader onboarding for them to take on roles or build skills within the community. Campaign to recruit interested parties on building but also using Hyku across projects and institutions
        - ■ We regularly communicate to repository users communities outside Samvera of our work, and methods
        - ■ Articulate community-wide needs with clear specifications to guide tech lead and project owner
        - ■ Maintenance - not shiny for developers - capacity and reward - promotion and tenure - how to make it intriguing - need some incentive for institutions to commit maintenance - competitive to institution priorities
            - ● Upgrading seems scary for dev? Newer dev
            - ● They need a team and supported to do the work
        - ■ Leverage multiple pathways to be active partners
        - ■ Voluntold
        - ■ Contract for maintenance? Cycle of maintenance priorities
        - ■ Strong core code so minimize the need for customization
        - ■ Feasibilty to stand it up - make it clear what it is needed to stand up and support
        - ■ Leverage Hyrax and Avalon work - aligning needs across the codes and develop once rather three if possible
            - ● SMIG - metadata group is really all communities
            - ● Documentation

- - Repository management
      - Bring on more larger libraries with developers to Hyku who could develop
    - Don't
      - Have limited contributors that stagnant and limit - all community
- Edward -
  - Identifying shared goals/functionality and finding the most efficient path forward to implement.
  - Identifying and prioritizing common pain points to communicate to developers.
  - Two-way, ongoing communication with developers. Developers educating librarians, librarians educating developers to better understand their respective parameters in moving forward.
  - Assisting other partners with investigation of issues and brainstorming solutions.
  -
- ND
  - All-to-all communication
  - Achievable transition from environment states (hosted to self-hosted, custom development to core, and back again)
  - Mechanisms for broad decision making
  - Clear contribution path from Hyku to Hyrax and rest of Samvera community (Hyku-to-Samvera communication; Samvera-to-Hyku communication)
- Rebekah
  - Robust community participation and/or contribution that does not rely on a few contributors
  - Clear, achievable goals from a central group, rather than the loudest group. Product owners and tech leads should have a clear idea of the community needs and priorities

Highlights:
- Focused on what does a successful community look like?
- Lots of commonalities across individual responses
- Easy to onboard, code that's easy to deploy, ways for every role to contribute
- Desire to leverage effort across whole community (Hyku-Hyrax-Avalon-core components)
- Larger institutions starting to adopt Hyku might lead to more institutional contribution

---

Plus + for the meeting

-
- Format and time was good
- I liked taking a few minutes for "crowd sourcing" of the future of Hyku/Hyrax +1

- So good to see everyone and meet new folks!
- As a newbie, I thought the Samvera overview was really helpful +1
    - I agree with this! The Share Fair was really helpful. +1
- Multiple sessions but not too many
- Regional is great way to get people together and easier to do, great to do this every other year
- Great way to learn from the community, in small groups
- Good way for others to be able to participate
- Unconference format worked well!
- Dinners!
- Felt like back to the roots when the partners met in smaller groups four times a year
- Both Share Fair and introductions were so great for learning what other institutions are doing with Samvera tooling

Delta - for the meeting

- Hour for lunch on your own for dev congress time wasn't enough
- Having dev congress time after would be helpful
- 35 minutes was was a little short, and 5 min between was too short. Maybe a mix of session times (some shorter, some longer)
- A mix of session lengths would be nice. Some conversations felt too short
- Need more karaoke!