







# Hydra-in-a-Box

## Persona Overview

			
<b>Name</b>	Aaron Maddox	Faustino Lund	Gwen Jennings
<b>Role</b>	Master's Student	Researcher and Professor	Digital Repository Manager
<b>Institution Type</b>	Small private university	Large public university	Medium-sized museum

			
<b>Name</b>	Alysa Otero	Melinda Torres	Boyd Gordon
<b>Role</b>	Digital Projects Coordinator	Digital Collections Librarian	Metadata Specialist
<b>Institution Type</b>	Large regional consortium	Large municipal public library	Large independent research institution

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## Student Persona



### Aaron Maddox

Master's Student, 2nd year  
Small private university

Nearing the end of his second year in the graduate program in Visual Arts, Aaron has narrowed his research interests to lithography and is writing his Master's thesis on 20th century printing history. Like most 24 year-olds, he's very comfortable with technology and the Internet and in addition to working as a student assistant in the Visual Arts department, he also does occasional graphic design work for a friend's small Web design company.

*"The fewer clicks I need to get something done online, the happier I am. I can usually figure out any UI, if it doesn't get in my way."*

**Frequency of repository use:** Occasional

**Technical proficiency:** High

	Motivation	Scenario	Specific Goals
1	Discover resources relevant to research topic	Aaron is gathering research for a thesis chapter about postcards. He searches the postcard collection of an historical society by entering the name of a lithographer, and narrows the long list of search results by clicking on a format facet and selecting "postcards." Clicking on the first result item display a record page with item metadata and an image viewer that enables him to see the front and back of the postcard. As he views successive items in the result set using the "Next item" link, he checks each item's rights information; when the rights statement indicates he can download a copy to use in his research, he copies the pre-formatted citation provided and uses the download link to save the image locally for possible inclusion in his thesis. On one of the item pages, Aaron sees a "Related To This Item" section with links to several postcard-centric collections in the repository and brief excerpts from a couple of Wikipedia pages, which provide some other interesting paths to follow.	<ul style="list-style-type: none"><li>• Discover relevant items in large repository</li><li>• View metadata for items of interest</li><li>• View both sides of item images, at high-resolution</li><li>• Download items</li><li>• Easily find other repository items potentially related to current item</li></ul>
2	Upload new version of document and make edits as proxy	Aaron's department chair has asked Aaron go into the university's repository and replace the chair's latest (pre-print) publication with the final version, and while he's in there, to see what he can do to improve the department's other contributions to the repository. Aaron logs in and indicates he is currently acting as a proxy for the department. He finds the department's profile page and clicks to edit the Chair's latest publication item. He uploads the PDF file and updates the metadata to indicate the actual publication date. Next, he begins adding metadata to the submissions from the other department members, in particular using the Keywords select menu to assign terms from the Getty AAT and the Department Area select menu to pick which departmental area (Photography, Sculpture, etc.) the item belongs to. Before logging out, he visits his own profile page to edit a few of his own submitted items, which are clearly distinguished from the departmental items he has worked on as a proxy.	<ul style="list-style-type: none"><li>• Upload a new version of existing document, in proxy role</li><li>• Add and edit metadata for existing objects, in a proxy role</li><li>• Use both external and local controlled vocabularies to enter metadata</li><li>• View both his own and his proxied items and activity on his profile page</li></ul>
3	Self-deposit his thesis	His master's thesis finally finished, Aaron logs into the university repository and uploads his thesis document. When the upload is complete, a metadata entry page is displayed. Aaron selects "Master's Thesis" as the resource type, which causes the page to update to show a smaller set of metadata fields. He enters a brief abstract, some keywords and selects an appropriate license for the thesis. Aaron knows his abstract could be better but without time to work on it more now, he saves the submission as a draft. With a complete abstract in hand the next day, he edits it and changes the submission status of his thesis to "Publish." A status message tells him to watch his email for further instructions. The next day he sees an approval confirmation in his list of repository notifications.	<ul style="list-style-type: none"><li>• Upload document, indicate type of resource</li><li>• Supply metadata required for resource type</li><li>• Save incomplete submission as a draft</li><li>• Change status of submission to publish</li><li>• See notifications related to submission</li></ul>



# Hydra-in-a-Box

## Researcher/Professor Persona



### Faustino Lund

Seismology Researcher and Professor  
Large public university

Like many ambitious assistant professors, Faustino is very focused on teaching, advising students, and (especially) his research; anything else is an unwelcome distraction. Although he uses technology to do his job, he has little patience for learning new tasks, especially complex system interfaces, but with his Type A personality, he's also reluctant to delegate tasks unless he has an easy way to ensure they are completed properly.

*“I’m starting to see the value of the university’s repository, but I’m a busy guy — the quicker and easier it is to submit my research and view my statistics, the more likely I am to use it.”*

**Frequency of repository use:** Infrequent

**Technical proficiency:** Low to moderate

	Motivation	Scenario	Specific Goals
1	Self-deposit multiple research documents	While preparing an interim report for his first major grant project, Faustino notes the funder’s requirement that all project-related publications and data to be deposited into an open access repository. He has just returned from presenting a conference paper related to the project so he immediately logs into his institution’s repository for the first time to try to get this deposit requirement quickly out of the way. The repository homepage includes a promising link called “Deposit your work,” which brings Faustino to a page where he is able to upload a folder containing his paper and presentation slides (as PDFs) and a zip file containing related research data. When the upload completes he’s presented with a form for entering metadata for the uploaded items, which changes somewhat depending on which resource type he says each item is, such as enabling him to enter his ORCID for the conference paper.	<ul style="list-style-type: none"> <li>• Upload multiple items in a single action</li> <li>• Add and edit metadata for items, using resource-type appropriate fields</li> <li>• Associate submitted items with his ORCID</li> <li>• Group submitted items that are part of the same larger work effort</li> <li>• Control visibility and access to items</li> </ul>
2	Designate a proxy to work with on group submissions	While working on a grant proposal, Faustino realizes it could be advantageous if all of the publications and data produced by his small research group are in the repository. He designates his department’s administrative assistant as a proxy for the group and asks him to gather and submit research materials from the other group members, while he works on submitting his own. Faustino is pleased to see he can add all his half-dozen published articles from a single screen. Even better, there is a field for each publication’s DOI that populates a handful of the metadata fields for him. The last publication he enters should not be publicly accessible until it comes out in the printed journal three months from now, so he sets an appropriate embargo period for that one. Finally, a couple of days before the proposal is due, he visits the repository system site again to view all of the activity associated with his research group and verify that the administrative assistant has submitted all of the group’s publications.	<ul style="list-style-type: none"> <li>• Designate a proxy for his research group</li> <li>• Set an embargo period for an item</li> <li>• Upload multiple papers at one time</li> <li>• Use publication’s DOI to auto-fill metadata</li> <li>• View history of activity associated with his research group and a given document</li> </ul>
3	Gather data for promotion and tenure package	Faustino is working on his promotion and tenure package. An important component of this is demonstrating how his research has engaged and had impact on the scholarly community. He remembers the monthly email report he’s been receiving from the digital repository that shows the number of views and downloads of each of his repository objects. He follows a link in the most recent email report that takes him to his repository profile page, which contains similar but more extensive analytics on his repository items, including metrics on how often his objects were cited, mentioned in blog posts, on Twitter, and on Facebook. A download link enables him to get a full report in PDF format for easy inclusion in his tenure package. While on his profile page he decides this might be a good time to edit and improve it so he can link directly to it from his tenure package and personal website.	<ul style="list-style-type: none"> <li>• Receive monthly analytics email for objects he has in the repository</li> <li>• Visit profile dashboard page to see more extensive analytics</li> <li>• Download analytics report for user-owned repository objects</li> <li>• View and edit user profile page</li> </ul>

# Hydra-in-a-Box

## Repository Manager Persona



### Gwen Jennings

Digital Repository Manager  
Medium-sized museum

Managing her organization's digital repositories has become increasingly frustrating during Gwen's six years on the job. While Gwen is very tech savvy, she doesn't have time or resources to do much custom coding and the CONTENTdm repositories have not improved at nearly the same pace as her organization's rapidly growing collections and user base.

*"Maintaining multiple digital repositories just doesn't make sense for us anymore. To stay on top of things, I desperately need one flexible, full-featured repository to manage all of my museum's digital objects."*

**Frequency of repository use:** Daily

**Technical proficiency:** High

	Motivation	Scenario	Specific Goals
1	Learn enough about a new repository product to make adoption decision	At a recent conference, a colleague suggested that Gwen look into a new Hydra-based product. Back at work, a Google search leads Gwen to the new repository product's website, which gives her a solid understanding of its features and how it differs from the repository products her organization currently employs. She's impressed by the feature set, but having had mixed experiences with open source software, she's most interested in determining whether switching to new product will pay off in the long run, or if it will just add to her current headaches. Fortunately, the product's website has an entire section devoted to explaining how easy it will be to install and configure, the support channels available (with links she checks out), and the ways the Hydra community will help ensure the product is sustainable over time. She also sees that the repository product team offers several in-depth training workshops over the year so she signs up for the next one to help her make a final decision.	<ul style="list-style-type: none"> <li>Understand product features and technical requirements</li> <li>Evaluate community support channels</li> <li>Find upcoming training workshops</li> <li>Attend workshop to inform adoption decision</li> </ul>
2	Customize general, technical, and submission configuration settings	With the new repository product installed at her organization, Gwen begins to tackle the next steps towards putting it into production. From the Administration interface she customizes the repository site's header and footer, adds a Google Analytics account ID, and provides details for technical settings, using the field-level tooltips and the product documentation linked from the product website to clarify questions she has. Gwen next works on customizing some of the aspects of submission process. Her organization uses only a subset of the provided resource types so she hides the types she doesn't want her submitters to see. She also assigns specific metadata profiles to each resource type, and indicates the sources (such as AAT and MeSH) she wants to use as controlled vocabularies for certain fields.	<ul style="list-style-type: none"> <li>Customize general and technical configuration settings</li> <li>Tailor resources types to organization types</li> <li>Tailor metadata profiles to those preferred by organization</li> <li>Find online documentation</li> </ul>
3	Easily update and extend repository features	Six months after moving the museum's digital repository to the new repository product, everything is running smoothly and Gwen has some time to address a wishlist of improvements. Several months ago she received notification that there was a major update of the product available, which among other things adds more flexible customization of workflows, a feature she was hoping for. She visits the code repo and reads the release notes for the update, which are detailed enough that she knows exactly what will be affected. After making the update and verifying that the updated repository is again working smoothly, she's confident enough to add new functionality to the repository. The museum director has long wanted to have digital companions to their physical exhibitions, so she adds the Spotlight gem, re-deploys, and begins exploring how to add digital exhibits to the repository.	<ul style="list-style-type: none"> <li>Easily keep up with product software updates</li> <li>Update repository software without disruption</li> <li>Extend repository to add exhibit features</li> </ul>

# Hydra-in-a-Box

## Digital Projects Coordinator Persona



**Alysa Otero**  
 Digital Projects Coordinator  
 Large regional consortium

Alysa manages the digital projects for a regional consortium of public libraries. Despite her nine years experience and excellent skillset, the rapid growth of the consortium has recently become a challenge for Alysa. As she begins working with the consortium’s recent installation of a new repository product she is hopeful that it will help her more easily deal manage and provide status on the flow of digital objects coming from consortium members.

*“I really enjoy helping our member libraries share their great collections. What I don’t enjoy is all the repetitive, manual effort it takes to produce the associated reports and feeds.”*

**Frequency of repository use:** Moderate

**Technical proficiency:** Moderate to high

	Motivation	Scenario	Specific Goals
1	Synchronize objects in repository with digital preservation software	Staff at a member library have just put online a new digital collection with 500 images and metadata. For preservation purposes, Alysa now needs to synchronize all of these objects and metadata with their local instance of Archivematica. She visits the Export page of the repository’s administrative interface and selects the relevant collections. She then chooses “preservation repository” as the type of export, ensuring that all technical metadata and digital objects will be exported, and selects a directory on the network drive to save the package. When the export is completed Alysa receives an email notification. She checks that the .tar package is in the directory and looks correct. She’s ready to use Archivematica to ingest the package and preserve the collections.	<ul style="list-style-type: none"> <li>• Select specific collection(s) for export</li> <li>• Export content objects as packages suitable for import into Archivematica</li> <li>• Receive email notification when export process is complete</li> </ul>
2	Generate and download collection statistics and usage reports	At year’s end Alysa has reports to prepare, both for the consortium’s board and for individual consortium members. She visits the “Reports” page in the repository’s admin interface, which displays high-level repository statistics, some standard reports she can view just by clicking a button, and an option for configuring a custom report. She views one of the standard reports (summaries of repository objects by type and filesize) and, liking what she sees, downloads it as a PDF. She also likes the standard collections summary report but this one she downloads in CSV format so she can use the data for reports she sends to each contributing consortium member. Finally, as she does at the end of every month, Alysa creates a customized monthly report of usage statistics (how often items have been downloaded or viewed, most used search, facet, and browse terms, etc.) that she downloads both as a PDF to share with her UX colleague and as a CSV, which she likes to put into spreadsheet software to do further analysis.	<ul style="list-style-type: none"> <li>• View and download repository and collection statistics reports</li> <li>• View and download usage reports</li> <li>• Configure reports to restrict by time period, collection, object status, etc.</li> <li>• Download reports in both PDF and CSV formats</li> </ul>
3	Expose metadata to share with an aggregator	Alysa’s consortium has signed an agreement to share records with their statewide DPLA Hub. They’ll need to expose a feed of metadata to the hub that uses consistent metadata across the collections they wish to share and includes links to the item in their repository and to a thumbnail image. Alysa visits the “Feeds” section of the repository admin interface to set up a new feed to share. She configures feed options such as the number of results per page, which collections to include, and which metadata properties to be exposed. Next, she sets up mapping from the collections to be included in the feed to the DPLA MAP. Satisfied with her configuration, Alysa saves the profile and publishes the feed. She verifies the feed setup by opening a browser to the feed location to review the data feed. Happy with how the feed looks, Alysa moves on to notify the Hub that the feed is ready for harvest.	<ul style="list-style-type: none"> <li>• Create a new feed of metadata</li> <li>• Configure feed options: page sizing, resumption tokens, sets options, etc.</li> <li>• Configure metadata options: metadata schema, properties to expose</li> <li>• Configure mapping between schemas</li> <li>• Publish feed for aggregators</li> </ul>

# Hydra-in-a-Box

## Digital Collections Librarian Persona



### Melinda Torres

Digital Collections Librarian  
Large municipal public library

With 13 years of experience at the library, Melinda does a little bit of everything in addition to her formal responsibilities managing the library's digital collections. She supervises part-time staff and library volunteers and, after learning HTML, CSS, and other web development technologies, has assumed day-to-day management of the library's CONTENTdm repository.

*"A hosted digital repository will make my life so much easier — if it's reliable and lets me do all the things I'm used to doing with my local repository."*

**Frequency of repository use:** Frequent

**Technical proficiency:** Moderate

	Motivation	Scenario	Specific Goals
1	Create and configure a repository using a hosted service	Melinda is both excited and worried as she begins work on her biggest challenge yet: to move the Library's digital repository to a Hydra-based hosted service. By providing just a few institutional details, Melinda has a hosted service account and a new, albeit empty, Hydra-based digital repository. She follows the prompts on the homepage of her new repository and visits the site's administration pages, which enable her to quickly personalize the repository site header, footer, and about page; add new admin users; and configure many settings that govern the repository appearance and features. Over the next week she spends most of her time importing objects and associated metadata into the new repository. She plans to do much more fine-tuning in the future but when there are a few hundred objects in the repository Melinda changes the setting that makes the repository public so she can share the URL and gather feedback. Her nervousness begins to fade as her frequent visits to the repository's dashboard consistently show that all system processes are green even as the number of site visitors grows.	<ul style="list-style-type: none"><li>• Sign up for a repository with a hosted service</li><li>• Configure repository for a specific institution</li><li>• Import objects and metadata to repository</li><li>• Make hosted repository publicly visible</li><li>• Quickly check system status via dashboard</li></ul>
2	Add items to collections	The Library's repository has been humming along for several months and Melinda decides it's time to use the collection-related features the hosted service offers. She has some new items that all relate to local firefighters. She uploads them in bulk, indicating they belong to a new "Regional Firefighters" collection. She next creates a "Local Heroes" collection, knowing that her cataloging staff is working on metadata for items that will eventually go in that collection. When a couple of those items are ready Melinda adds them to the repository as single object uploads. As she does so, it occurs to her that a few of the firefighter collection items would also be appropriate for the "Local Heroes" collection so she finds those items and edits them to indicate they are also part of the second collection.	<ul style="list-style-type: none"><li>• Add items in bulk and designate as part of a new collection</li><li>• Create new collection independent of item upload</li><li>• Add items as individual items</li><li>• Edit items to assign to additional collection</li></ul>
3	Configure workflows and view workflow status	As her understanding of the hosted service grows, Melinda is eager to take advantage of other features that will enable more library staff work in the repository. She's already added several catalogers as users to the repository. Now she visits the Workflow Configuration page where she's able to configure a collection-specific workflow. She sets it up so that when an item is added to the "Local Heroes" collection, it is sent to her for approval. She can approve it, which publishes the item. If she thinks the item needs more work, she can send it back to the catalogers with feedback in the "internal note" field, or just to her senior cataloger for further description. To keep an eye on how well her staff is getting the hang of things, Melinda regularly visits the Workflow Status page, where she can view the status of all repository objects.	<ul style="list-style-type: none"><li>• Configure workflows for collections, and for a specific collection</li><li>• Assign objects to different people at various stages in a workflow</li><li>• See the workflow status of repository objects</li><li>• Attach notes to objects for internal communication</li></ul>

# Hydra-in-a-Box

## Metadata Specialist Persona



**Boyd Gordon**  
Metadata Specialist  
Large independent research institution

Boyd began his career as a traditional cataloger at the research institute eight years ago and became a metadata specialist about five years ago. He's known as "the metadata guy" by other units at the institution, who are happy to defer to him when generating their own metadata records. Working with metadata suits him well, but the volume of work coming his way is starting to become overwhelming.

*"I love working with metadata, but I'm beginning to think my sanity is dependent on finding better tools that will help me do my work more efficiently."*

**Frequency of repository use:** Frequent

**Technical proficiency:** Moderate

	Motivation	Scenario	Specific Goals
1	Configure metadata input form, including controlled vocabularies	As part of a new digitization project with his institution's art gallery, Boyd needs to set up the metadata input form to be used by the gallery staff. From the "Metadata Configuration" section of the repository administrative interface he selects DPLA MAP 4.0 as the metadata set. He hides from the form two fields not relevant to this project, and adds two new properties, first choosing "VRA core 4.0" from the available list of schemas and then "style period" and "technique" as fields from that schema to add. Boyd next configures controlled vocabularies for the subject and format properties, selecting values from a list of linked data vocabularies from the LCSH and the AAT respectively. He also sets up a field where staff can create a link to an existing record in the library's catalog if one exists.	<ul style="list-style-type: none"> <li>• Customize metadata form for collection</li> <li>• Include properties from multiple schemas</li> <li>• Configure controlled vocabulary options for specific properties</li> <li>• Link repository item to library catalog record</li> </ul>
2	Add new metadata records, individually and in bulk	Boyd has received from another unit a spreadsheet of metadata. As usual, Boyd reviews and enhances the metadata, making sure columns adhere to the MODS standard used for the project and filling in various fields with additional information. With the spreadsheet completed, Boyd visits the "Object Ingest" page of the repository's administrative interface and selects the bulk upload tab. He selects the option to indicate that the uploaded data will come from a CSV file and will correspond to MODS, selects the file to upload, and clicks the Upload button. He waits while the system analyzes the columns in the spreadsheet. After a moment, the screen updates to show a preview of the record structure that would result when the spreadsheet is ingested. Boyd verifies that the mapping is correct and confirms the metadata should be ingested. A bit later in the day he receives a notification that the ingest job is done. Boyd reviews the records and is satisfied, so he publishes them to the repository.	<ul style="list-style-type: none"> <li>• Add new metadata records via bulk (spreadsheet) upload</li> <li>• Review uploaded metadata before ingest</li> <li>• Add items to existing collection via metadata creation form</li> <li>• Review metadata records before they are published</li> </ul>
3	Analyze existing metadata and remediate issues	Boyd's latest project is to normalize the research institution's metadata, much of which is nonstandard and overuses locally-created elements. From the Export page of the repository's administrative interface Boyd selects a couple of older collection to analyze. For the export options, he chooses to export descriptive metadata only, leaves the default selection to all fields, and chooses CSV as the export file format. After using OpenRefine to clean up the exported metadata and map it to the standard DPLA MAP profile, Boyd visits the repository's Bulk Edit page and imports the spreadsheet of improved metadata. Once the data is fully uploaded, he receives a notification that the import job is done. As Boyd reviews the imported data, he sees that there is still inconsistent punctuation at the end of all of the rights statements. He fixes those errors in the bulk edit tool. After taking one last step to reconcile his subject fields with the LCSH by running an automated match and then manual reviewing outliers, Boyd hits the publish button to index the improved metadata to the live repository.	<ul style="list-style-type: none"> <li>• Export a batch of metadata, selecting subsets of records and fields to export</li> <li>• Edit metadata using built-in bulk edit tools</li> <li>• Replace metadata via bulk upload of new records</li> <li>• Reconcile metadata values against a controlled vocabulary, individually or in bulk</li> </ul>