



ArchivesSpace

ArchivesSpace 1.0 and Beyond

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DLF Forum

Austin, TX

November 5, 2013



ArchivesSpace



Overview

- **Application development**
- **Community development**
- **Projections**





ArchivesSpace: Project Becomes Program

- Once a **project**, now a **program** with an organizational home and dedicated staff but capable of managing funded projects
- **Instigated for integrating** the best features of the Archivists' Toolkit and Archon
- **Generously funded** by the Andrew W. Mellon Foundation
- A **community effort**, led by the libraries of New York University, the University of Illinois at Urbana-Champaign, the University of California, San Diego, and LYRASIS, the organizational home
- Two core objectives: 1) **developing an archives information management application** responsive to the needs of archivists and 2) **developing a community** capable of supporting and informing the application





Project Team

- **Steering Group:** Luc Declerck, David Millman, Beth Sandore, with Robin Dale
- **Technical Architect:** Mark Matienzo
- **Development Manager:** Katherine Kott
- **Stakeholder Team:** Mark Matienzo (Product Owner), Chris Prom, Kyle Rimkus, Scott Schwartz, Annie Ross, Brad Westbrook (Archivists/Business Analysts), Joe Pawletko (Technical Advisor)
- **Development Team (Hudson Molonglo):** James Bullen, Mark Triggs, Payten Giles, Brian Hoffman
- **Testing and Release Team:** Sai Tadikonda, Brian Tingle, Adrian Turner (CDL); with Hudson Molonglo, Mark Matienzo, and Katherine Kott
- **Migration Team:** Joe Pawletko (NYU), Nathan Stevens (AT), Chris Prom (Archon) plus Stakeholders and UIUC programmers





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Application Development



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Design & Implementation Phase

July 2011	Phase begins
Aug. 2011-June 2012	Development planning and analysis
Sep. 2011-Oct. 2011	Request for Proposals issued
Oct. 2011	Technical planning meeting at UCSD
July 2012	Hudson Molonglo announced as vendor
July 2012-July 2013	Application development subcontract
Sep. 2012-Aug 2013	Development of migration tools
July 2013-Aug 2013	Development of XSLT stylesheets





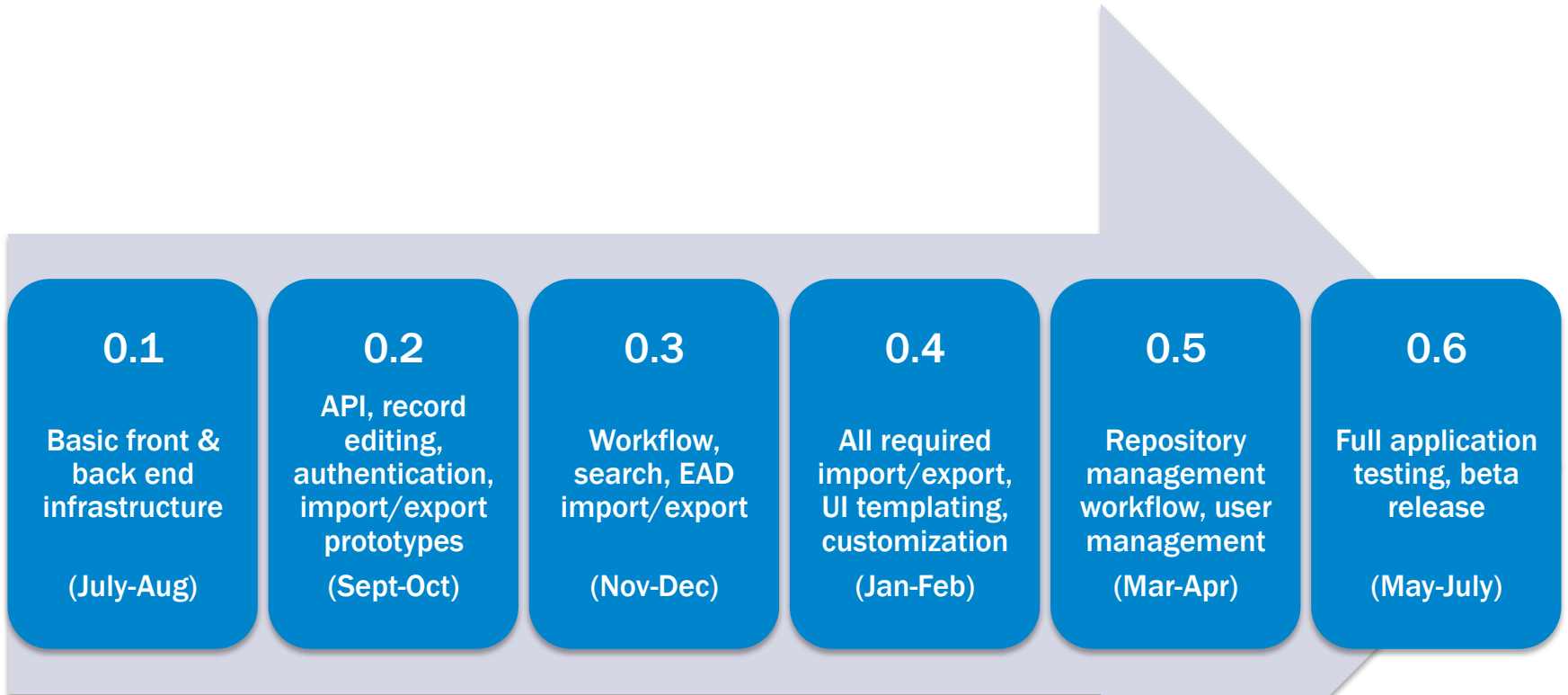
Development Planning/Analysis

- **Primary area of emphasis for first year of development phase**
- **Specification analysis and revision**
- **Creation and iterative revision of draft data models, object workflow, and position statements**
- **Guiding principle: focus on functional needs and avoid specific technical solutions**





Development Cycles





Application Release History

- **1.0.0 (September 30, 2013)**
- **0.6.2 (July 23, 2013)**
- **0.5.0 (April 29, 2013)**
- **0.4.0 (March 4, 2013)**
- **0.3.1-1 (January 8, 2013)**
- **0.2.0-1 (October 29, 2012)**
- **0.1.0 (September 3, 2012)**

<https://github.com/archivesspace/archivesspace/wiki/Changelog>





ArchivesSpace Product Vision

- **A best of breed, open source archives management system, supporting core archival functions and standards ...**
- **... that can both scale up and scale down ...**
- **... that is flexible, efficient, and easy to use, maintain, and administer ...**
- **... that is extensible and can interoperate easily with other applications and systems ...**
- **... with a healthy ecosystem of users, developers, and partners dedicated to sustaining the product in the open source environment.**





Migration Tools

- **Separate migration tools developed for each existing application**
- **Archivists' Toolkit: migration plugin, used with new maintenance release**
- **Archon: separate migration tool, used with forthcoming maintenance release**
- **Does not require exporting data as EAD, etc. before migration**





ArchivesSpace 1.0 Features

- Accession management
- Multilevel archival description with rapid data entry, with drag and drop user interface
- Digital object metadata management
- Relationships between records
- Location management
- Event records for preservation / collection management actions
- Authority control for people, corporate bodies, families, subjects, classifications, software
- Public discovery interface
- Import and export of EAD and MARCXML; import of CSV; export of MODS, METS, & DC
- Support for multiple repositories and multi-tenancy
- REST API
- Full-text search
- Plugin architecture
- Controlled value lists
- Configurable permission “groups”
- LDAP authentication





Development Team

- **Hudson Molonglo formed in 2011**
- **ASpace dev team: Mark Triggs, Payten Giles, Brian Hoffman, James Bullen - 4 members with over 40 years combined experience.**
- **Specialists in open source software, system architecture, user interface, archives metadata**
- **Experience with developing, deploying, integrating, maintaining and customizing similar software**





Technology

- JRuby, Sinatra, Rails
- jQuery, Twitter Bootstrap
- JSON, MySQL, Derby, Solr
- RSpec, Selenium, SimpleCov
- Git, Ant





Architecture

- **Backend application takes care of data persistence and presents a RESTful API**
- **Frontend applications present user interfaces and exchange JSON data with the backend via the API**
- **Shared libraries for consistent and efficient handling of operations on JSON data objects**
- **An indexer ensures that as data changes it is accurately reflected in the search indexes**





Development Methodology

- Agile – Scrum
- Test driven
- Frequent code reviews
- Remote ... very remote





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Building a Sustaining Community



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Membership Fees

Tiered membership fee model

Very Large	\$7,500
Large	\$5,000
Medium	\$3,000
Small	\$1,000
Very Small	\$300





Member Enrollment

Quantity	Charter Members	General Members	Total
Very large	27	1	28
Large	8	6	14
Medium	5	3	8
Small	4	3	7
Very Small	10	9	19
Undetermined		14	14
Total Members	54	36	90

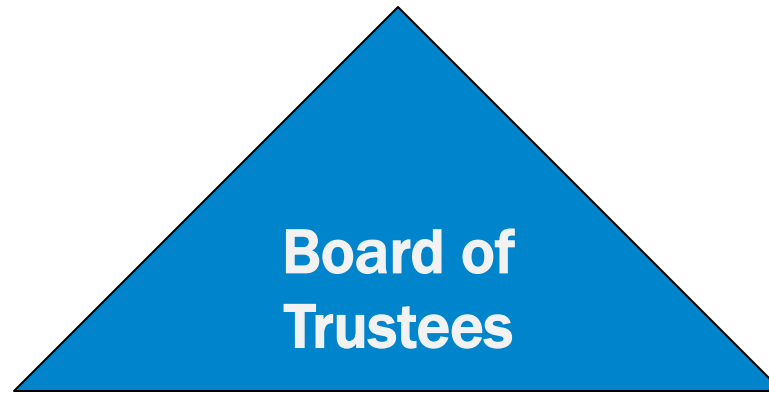




Governance

Community

Application





Board of Trustees

Partners	Carol Mandel, New York University
	Brian Schottlaender, UC San Diego
	John P. Wilkin, University of Illinois, Urbana-Champaign
	Robin Dale, LYRASIS
Elected Officers	Megan Sniffin-Marinoff, Harvard University, Very Large
	Tim Pyatt, Pennsylvania State University, Large
	Gerald Gaidmore, William and Mary College, Medium
	Lynda Kachurek, University of Richmond
	Chris Ervins, Mojave Desert Heritage and Cultural Association
Ex Officio	Cynthia Howard, LYRASIS Board of Directors
	Brad Westbrook, ArchivesSpace Program Manager





Membership Benefits

- **Access to user instruction manual, video tutorials, help support**
- **Request new features**
- **Persistent application and community**





Organizational Home





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Projections



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The Path Forward

- **Build robust governance structure**
- **Develop additional functionality identified through user testing**





Governance Structure

- **Board in place**
- **Advisory groups to be established soon**
 - User Advisory
 - Technical Advisory
- **Groups will create processes for**
 - Setting development priorities
 - Integrating community based development





Additional Functionality

- **Development roadmap in place based on user feedback**
- **Additional funding for transition=additional HM development cycles**





Development Roadmap

- Public discovery
- Rapid data entry
- Bulk editing
- Reporting
- Import/export
- Identification & development of high priority plug-ins





Resources

- ArchivesSpace website: <http://www.archivesspace.org/>
- ArchivesSpace Github: <https://github.com/archivesspace/archivesspace>
- ArchivesSpace membership brochure: <http://www.archivesspace.org/wp-content/uploads/2013/04/ArchivesSpace-Inline-Brochure.pdf>
- ArchivesSpace governance brochure: http://www.archivesspace.org/wp-content/uploads/2013/07/ArchivesSpace_Governance_Brochure_20130715.pdf





To Request Membership

Contact Brad Westbrook, ArchivesSpace
Program Manager

(brad.westbrook@lyrasis.org or
ArchivesSpaceHome@lyrasis.org)





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QUESTIONS?

THANK YOU!