

SUSTAINING ARCHIVESSPACE

DLF Forum

Denver, CO

November 4, 2012

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Topics

- Background
- Technology & Software Development
 - Technical framework
 - Process
 - Alpha preview
- Interoperability
- Organizational Home
- Governance & Sponsorship
 - Structure
 - Rollout
- Relationships with other organizations (e.g. SAA)

Review: ArchivesSpace is...

- A project funded by the Andrew W Mellon Foundation for building a “next generation” archives management tool
- A community effort, led by the libraries of New York University, the University of Illinois at Urbana-Champaign, and the University of California, San Diego
- The development of a sustainable partnership and community to support and foster the growth of the software

ArchivesSpace Groups and Roles

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

Development partner

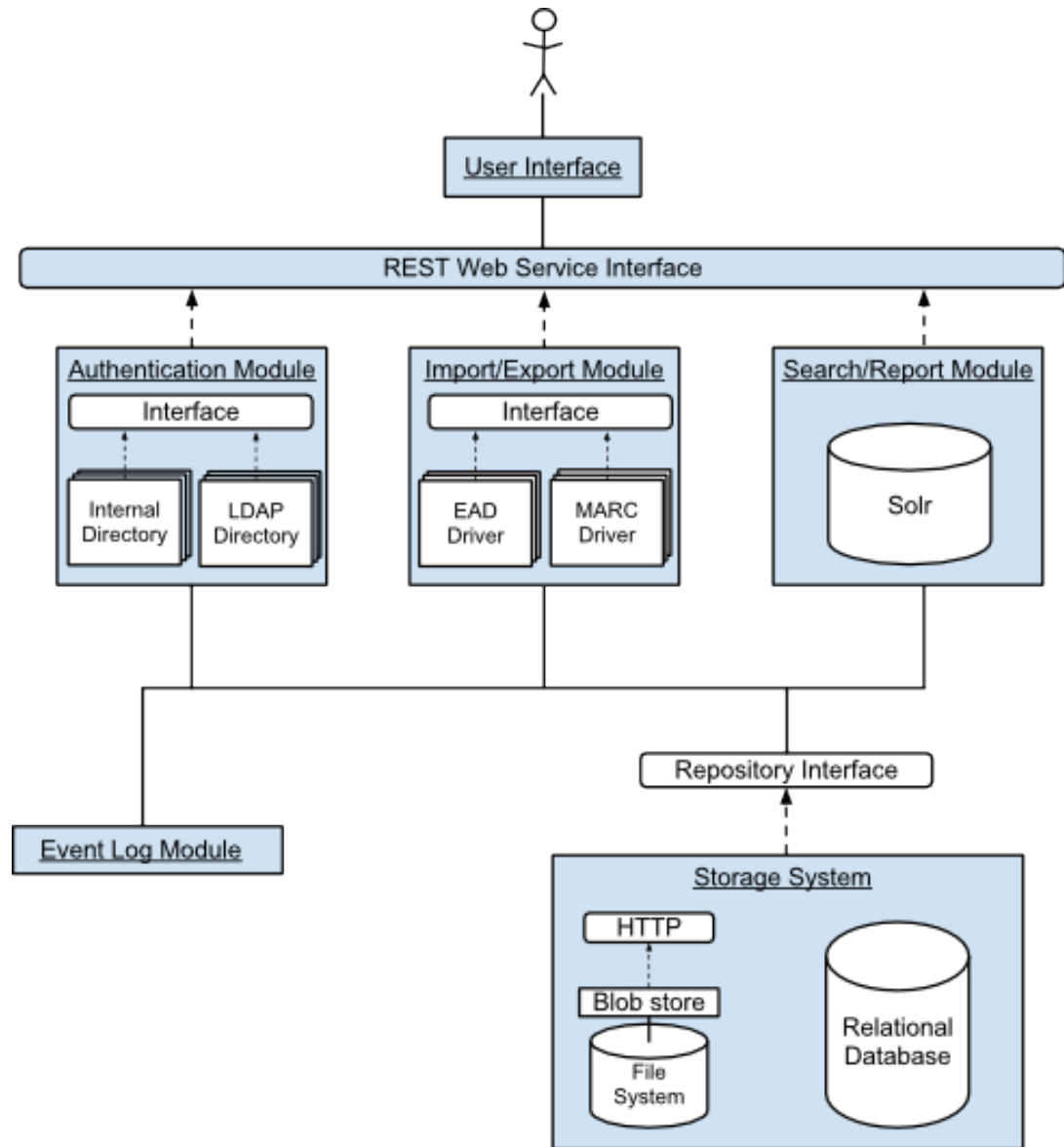
- Hudson Molonglo Pty Ltd
 - An IT consulting firm with staff in both the US (Hudson) and Australia (Molonglo)
 - Deep experience with digital library and archival management systems
 - Selected through a formal RFP process
- Team Members
 - James Bullen (lead)
 - Mark Triggs (back end)
 - Payten Giles (UI)
 - Brian Hoffman (data model, import/export)

ArchivesSpace Product Vision

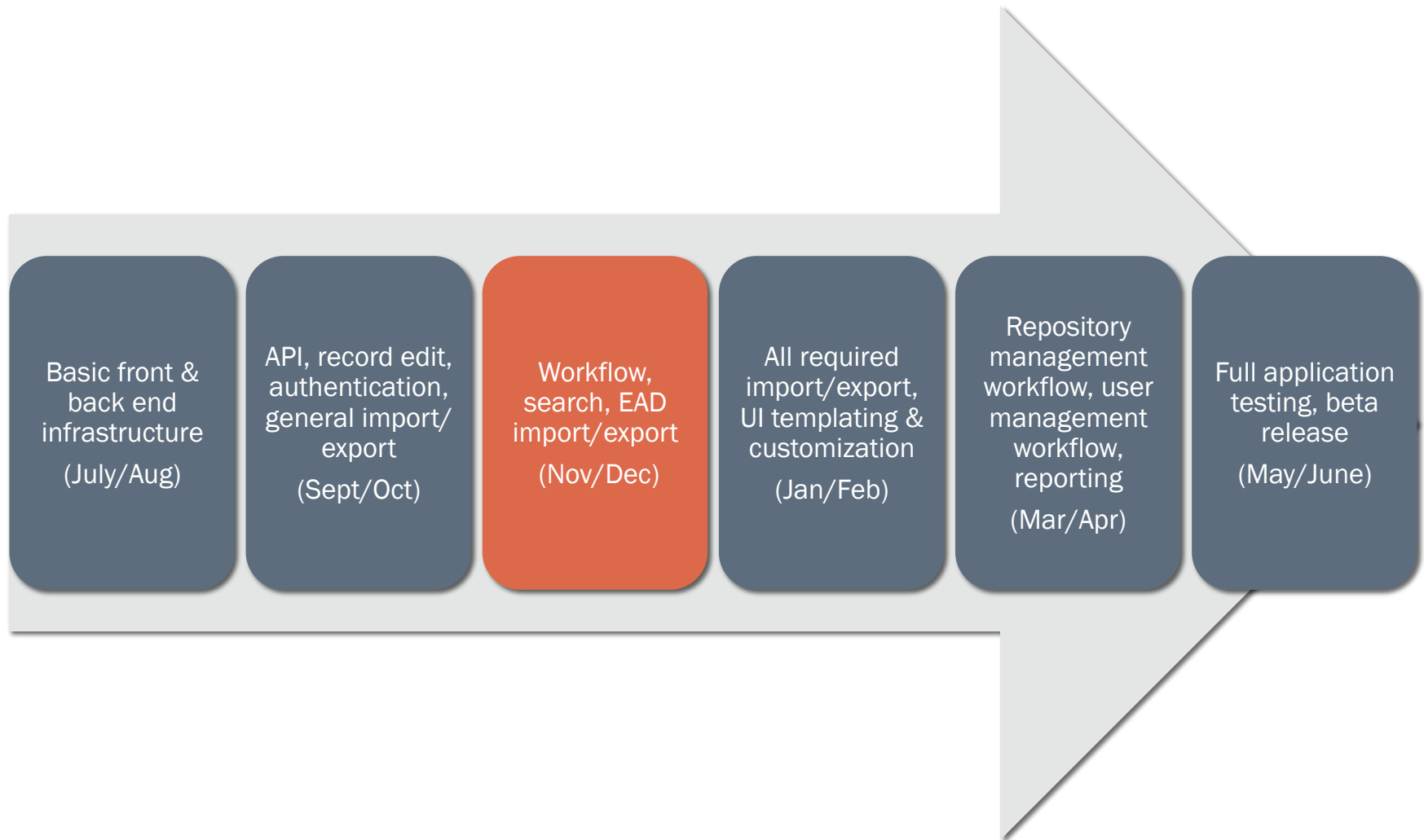
- A best of breed, open source archives management system, supporting core archival functions and standards ...
- ... that can both scale up and scale down ...
- ... that is flexible, efficient, and easy to use, maintain, and administer ...
- ... that is extensible and can interoperate easily with other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

Technical Framework

- Separate user interface & back end
- REST service interface & documented API
- Frameworks for rapid development
 - Sinatra
 - Ruby on Rails
 - Twitter Bootstrap
- Emphasis on
 - Ease of deployment
 - Openness
 - Performance & scalability
- Selected technologies
 - JRuby
 - Java virtual machine
 - Lucene and Solr
 - Relational databases
- Support for multitenancy



Development Plan: July 2012-June 2013



Test Driven Development

- Development in HM environment
 - Continuous integration (Jenkins)
- California Digital Library support for testing
 - Cloud-based deployment and testing (AWS, Travis, Saucelabs)
 - Automated build and deployment testing
 - Interactive testing by ArchivesSpace Team
 - Broader-based testing by community members coming soon
- At launch, application will be supported and tested by LYRASIS, the organizational home (more about that later)


Managing User Stories

The screenshot displays the Pivotal Tracker interface for the ArchivesSpace project. The browser address bar shows the URL <https://www.pivotaltracker.com/projects/386247>. The application header includes the Pivotal Tracker logo and navigation links: PROJECTS, DASHBOARD, REPORTS, HELP, and KATHERINE KOTT. Below the header, the project name "ArchivesSpace" is shown, along with a velocity of 25 and an "ADD STORY +" button.

The main content area is divided into four columns:

- CURRENT**: Shows 8 items as of 15 Oct - Current. The progress bar is at 0% of 24 points. Items include:
 - archival_description, instances As an Archivist, I want to associate an Instance with a (Resource | Resource Component) (PG) [Finish]
 - archival_description, containers, instances As an Archivist, I want to associate an Instance with a Container (PG) [Finish]
 - accessioning, archival_description, digital objects, notes, rights As an Archivist, I want to create and edit Notes subrecords linked to Resources. (MT) [Finish]
 - containers, locations As an Archivist, I want to assign Location information to a Container (PG) [Start]
 - import/export As an Archivist, I want to export a description as EAD (BH) [Start]
 - archival_description, events As an Archivist, I want to create and edit Event records (MT) [Start]
- BACKLOG**: Shows 9 items as of 29 Oct. The progress bar is at 25% of 25 points. Items include:
 - accessioning, archival_description, notes As an archivist, I want to add Notes to other record types (besides Resources) (MT) [Start]
 - archival_description, digital objects As an Archivist, I want to manage Digital Objects (minimal implementation) (MT) [Start]
 - archival_description, deaccessioning As an Archivist, I want to create and edit Deaccession records (minimal implementation) (PG) [Start]
 - archival_description, events As an archivist, I want to create and edit a Collection Management subrecord (minimal implementation) (MT) [Start]
 - agents, archival_description As an Archivist, I would like to indicate an Agent is that are either the (creator | source | subject) of an (Accession | Resource | Resource Component). (PG) [Start]
- ICEBOX**: Shows 5 items. Items include:
 - As an archivist, I want to enter XML tags (mixed content) into Notes fields [Start]
 - archival_description, business rules Users should not enter a ref_id manually for a Resource Component [Start]
 - archival_description Date entry form not displaying in Resource Component edit view [Start]
 - archival_description User with appropriate permissions should be able to create a sibling ("+1") record to the Resource Component directly below a top level Resource (MT) [Start]
 - archival_description Delete action on a pre-existing Extent statement from a Resource or Resource Component does not work [Start]
 - accessioning, dates, ui When adding an accession, incorrect date syntax throws error [Start]
 - containers, digital objects request clarification As an Archivist I [Start]
- EPICS**: Shows 2 done epics. The list includes:
 - Deployment and Hosting
 - Locations
 - Accessioning
 - Archival Description
 - Deaccessioning
 - Digital Objects
 - Patron Services
 - Legacy Applications
 - Reporting
 - Import / Export
 - Application Administration
 - Authorization and Roles
 - Plugins/Extensibility
 - [Business Rules]
 - [Request Clarification]
 - [Rewrite Candidates]
 - [Automated Testing / Build Tasks]
 - [Deep Freeze]

Community Involvement



roups

1 of 3


⏪

/ groups
 ime
 arred

ouncements
 oogle Groups Ann...
 ically viewed
 rchivesSpace
 ical searches
 ayten (in archives...
 adson molonglo (i...
 ically posted to
 rchivesSpace

vorites

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Payten Giles

Re: [archivespace] General Layout/Default Theme: ArchivesSpace Wireframes

Hi Cory,

 Currently, the optional Branding section on the wireframe can be configured on a site basis. This branding section is a te HTML – you're seeing an empty branding template in the mockup.

 Alternatively, this branding section can be styled with CSS via the selected theme -- as per our dev server: <http://aspace>

 We're currently using the LESS implementation of Bootstrap, which allows our themes to customise almost all variables feel. When developing themes, you'll be able to write pure CSS to override specific styles and also override the Bootstrap link color etc.

 If you'd like to have a play, in our v0.1 release the theme can be set via the configuration setting AppConfig[:frontend_th folder, rename it, and you're away.

 All these wireframes/mockups are intended for the staff interface of ArchivesSpace. At this stage, we see the Public int frontend application. Keeping these two applications separate will inevitably simplify the code and also deployment of bo opportunity to re-use templates and design from the Staff interface as the specifications for both do have their similaritie:


 Thanks,
 Payten Giles

 (Member of the ArchivesSpace Development Team)


Tracking Development

github[Signup and Pricing](#)[Explore GitHub](#)[Features](#)[Blog](#)[Sign in](#)

PUBLIC

 **hudmol / archivesspace**

★ Star 27

 Fork 4

Code


Network

Pull Requests 1

Issues 17

Wiki

Graphs

 branch: master ▾


Files

Commits


Branches 86


Tags 9


Downloads


archivesspace / Commit History 


Oct 13, 2012


 **Path fix for Windows**
marktriggs authored 3 days ago


e94b0c1825 



Browse code 


 **Patched up another Selenium test race condition.**
marktriggs authored 3 days ago


3079276bde 


Browse code 


 **Switched all JRuby versions to the latest RC (1.7.0.rc2)**
marktriggs authored 3 days ago

 01791d1579 


Browse code 


 **Set the demo DB to write to java.io.tmpdir, not Dir.tmpdir.** ...
marktriggs authored 3 days ago


d400d66bb7 

Browse code 

Oct 12, 2012

 **fixed top level title bug and updated specs**
lcdhoffman authored 4 days ago
➡ marktriggs committed 4 days ago




b24f3afe54 

Browse code 

Alpha Releases

- 0.2 (October 29, 2012)
 - Instance, container, and location management
 - Digital objects (basic implementation)
 - Event records
 - Notes (both single and multipart)
 - Deaccession records
 - Basic EAD export
- 0.1.3 (October 15, 2012)
 - Rights management records
 - Basic EAD import
- 0.1.2 (October 1, 2012)
 - Complex extent statements
 - External document/link associations
 - Local authorization
- 0.1.1 (September 17, 2012)
 - Agents
- 0.1 (September 3, 2012)
 - Archival description (resource and resource component records)
 - Accessions
 - Subjects/controlled vocabularies
 - Local authentication

Accessions

ArchivesSpace  Browse ▾ Create ▾ Import / Export ▾ Admin ▾  test1351869030 ▾  admin ▾

[Home](#) / [Browse Accessions](#) / [Miss Piggy papers](#) / [Edit](#)

[Basic Information](#) >

[Extents](#) >

[Dates](#) >

[External Documents](#) >

[Rights Statements](#) >

[Deaccessions](#) >

Save Accession

Miss Piggy papers Accession

Basic Information

Title	<input type="text" value="Miss Piggy papers"/>		
Identifier	<input type="text" value="1994"/>	<input type="text" value="M"/>	<input type="text" value="018"/>
Accession Date	<input type="text" value="2011-01-01"/>		
Content Description	<input type="text" value="Miscellaneous trotters"/>		
Condition Description	<input type="text" value="Muddy"/>		

Subjects

Animals in human situations -- United States -- 20th century

x

Multiple Extent Statements

Basic Information >

Extents >

Dates >

External Documents >

Rights Statements >

Deaccessions >

Save Accession

Extents

Add Extent

PortionWhole

Number17.5

TypeLinear Feet

Container Summary

Physical Details

Dimensions

PortionPart

Number400

TypePhotographic Prints

Container Summary

Physical Details

Dimensions

Multiple Date Statements

Basic Information

Extents

Dates

External Documents

Rights Statements

Deaccessions

Save Accession

Dates

Add Date

Label: Creation

Type:
☐ Expression
☐ Single Date
☒ Inclusive Dates

Begin: 1972

Begin Time: HH:MM:SS

End: 1984

End Time:

Uncertainty: ☐

Era:

Calendar:

Rights Statements

Basic Information >

Extents >

Dates >

External Documents >

Rights Statements >

Deaccessions >

Save Accession

Rights Statements

Add Rights Statement

Identifier

km1

X

Rights Type

Intellectual Property

▾

Active

☒

Materials

Photographic prints

IP Status

Copyrighted

▾

IP Expiration Date

2014-01-01

License Identifier Terms

Statute Citation

Jurisdiction

Type Note

Permissions

Restrictions

Restrictions Start Date

YYYY-MM-DD

Restrictions End Date

2014-01-01

Granted Note

Deaccessions

Basic Information

Extents

Dates

External Documents

Rights Statements

Deaccessions

Save Accession

Add Deaccession

Whole (or Part) ☐

Description

10 photographs of Kermit

Reason

They are unsavory

Disposition

Returned to Miss Piggy

Notification Given? ☒

Deaccession Date

Label

Deaccession

Type

☐ Expression
 ☒ Single Date

Begin






2012-10-28



Begin Time

HH:MM:SS


☐ Inclusive Dates
 ☐ Bulk Dates


Subjects

ArchivesSpace  [Browse](#)  [Create](#)  [Import / Export](#)  [Admin](#) 

test1351869030  admin 

[Home](#) / [Browse Subjects](#) / [New Subject](#)

[Terms](#) 

[External Documents](#) 

Save Subject

New Subject

Terms


Term


Animals in human situations


United States

20th century

Temporal







Animals in human situations -- United States -- 20th century

External Documents

Save Subject

Cancel

Add External Document

Cultural context

Function

Geographic

Genre / form

Occupation

Style / period

Technique






Temporal



✓ Topical

Uniform title


Geographic


Agents


ArchivesSpace  [Browse](#)  [Create](#)  [Import / Export](#)  [Admin](#) 


test1351869030  admin 

[Home](#) / [Browse Agents](#) / [New Person](#)

Agent Details 

Names 

Contact Details 

External Documents 

Save Person

New Person Agent

Agent Details

Type **Person**

Names Add Name

Authority ID

Source

Rules

Direct Order

Prefix

Title

Primary Name

Rest of Name

Archival Description (Resources)

[Home](#) / [Browse Resources](#) / [New Resource](#)

New Resource Resource

Basic Information

Title

Identifier

Subjects

Puppetry -- Archives x

Animals in human situations -- United States -- 20th century x

[Save Resource](#)

Notes Add Note ▾

Single Part Note ×

Label

Type

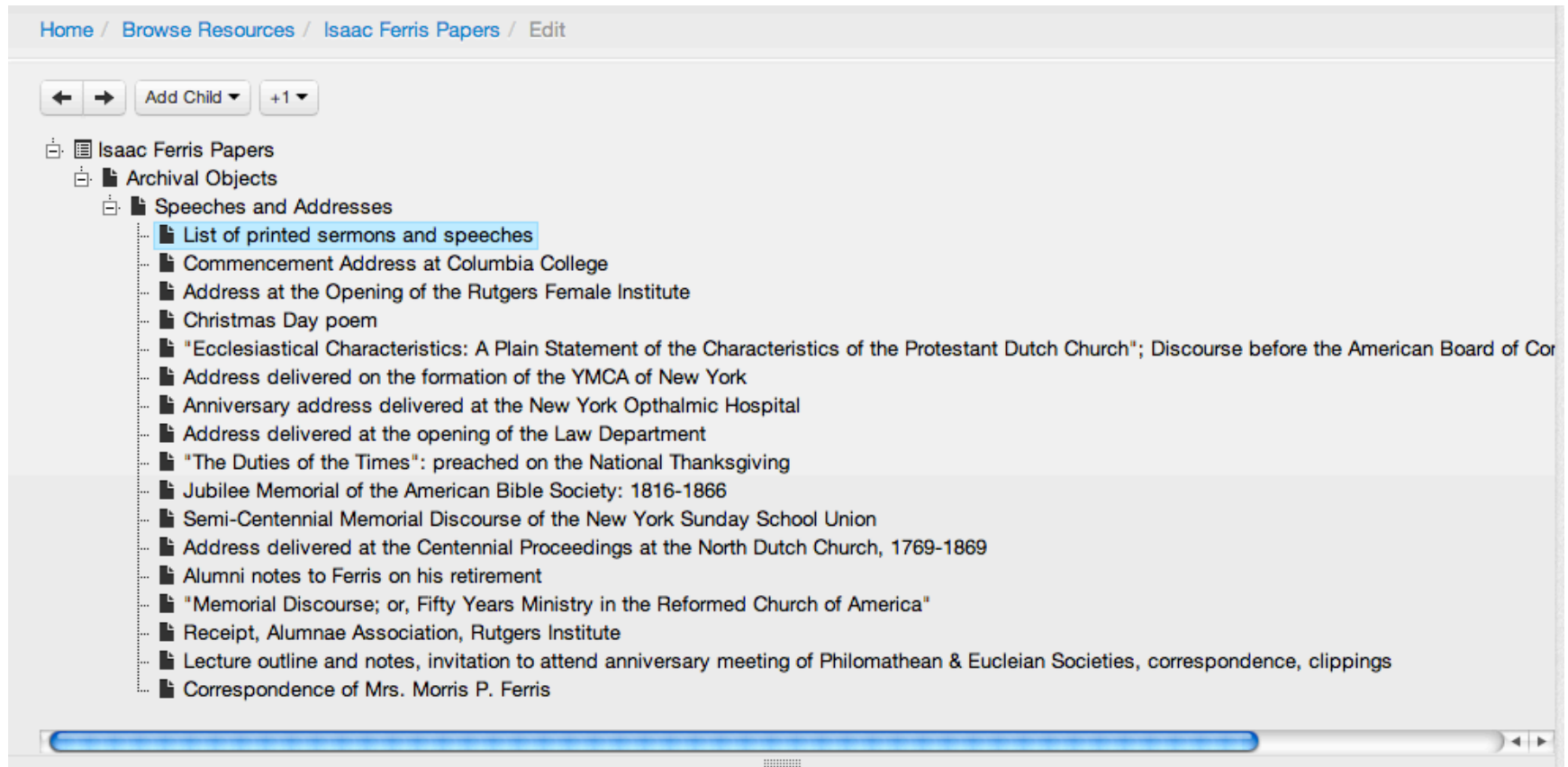
Content

Multi-level Description

Home / Browse Resources / Isaac Ferris Papers / Edit

← → Add Child ▾ +1 ▾

- Isaac Ferris Papers
 - Archival Objects
 - Speeches and Addresses
 - List of printed sermons and speeches
 - Commencement Address at Columbia College
 - Address at the Opening of the Rutgers Female Institute
 - Christmas Day poem
 - "Ecclesiastical Characteristics: A Plain Statement of the Characteristics of the Protestant Dutch Church"; Discourse before the American Board of Cor
 - Address delivered on the formation of the YMCA of New York
 - Anniversary address delivered at the New York Ophthalmic Hospital
 - Address delivered at the opening of the Law Department
 - "The Duties of the Times": preached on the National Thanksgiving
 - Jubilee Memorial of the American Bible Society: 1816-1866
 - Semi-Centennial Memorial Discourse of the New York Sunday School Union
 - Address delivered at the Centennial Proceedings at the North Dutch Church, 1769-1869
 - Alumni notes to Ferris on his retirement
 - "Memorial Discourse; or, Fifty Years Ministry in the Reformed Church of America"
 - Receipt, Alumnae Association, Rutgers Institute
 - Lecture outline and notes, invitation to attend anniversary meeting of Philomathean & Eucleian Societies, correspondence, clippings
 - Correspondence of Mrs. Morris P. Ferris



Instance and Location Management

Basic Information >

Extents >

Dates >

External Documents >

Rights Statements >

Instances >

Save Archival Object

Container

Type 1Box

Indicator 11

Barcode 1

Type 2Folders

Indicator 21-20

Type 3

Indicator 3

LocationsAdd Location

StatusCurrent

Start Date2012-11-04

End DateYYYY-MM-DD

Note

LocationMuppet Theater, Loft, Catwalk, Sam the Eagle's Nest [0, 0, Eg

Event Records

Basic Information

Event Date

Agent Links

Record Links

Save Event

New Event Event

Basic Information

Type Decompression

Outcome success

Outcome Note

Event date

Label Other

Type ☐ Expression ☒ Single Date

Begin 2012-11-04

Begin Time HH:MM:SS

☐ Inclusive Dates ☐ Bulk Dates

Uncertainty

Era

Calendar

Agent Links Add Agent Link

Role Authorizer

Agent Statler and Waldorf LLC.

Record Links Add Record Link

Role Source

Record Fozzy Bear subject files

Interoperability

- User needs
 - Integration with repositories and digital preservation systems
 - Integration with discovery and patron request systems
- Funders' interest in leveraging investments

ArchivesSpace Organizational Home

- LYRASIS
 - The largest membership organization serving libraries and information professionals in the United States
 - Known for its “local touch”—fostering collaboration and cooperation among members

Organizational Home: LYRASIS

- Sustainability through membership
- Hosted solutions
- Help desk services
- Software upgrades
- Training

Governance Process

- Membership Model
 - Sliding scale membership fees
 - Structured to include representation from a variety of organization types and sizes
- Governance Structure
 - Board
 - User Advisory Council
 - Technical Advisory Council
 - Boards start work July 2013

Opportunities for Involvement

- Charter memberships
 - Available through April 2013
- “Regular” membership
 - Available January 2014
- Sponsorship
 - For organizations that do not plan to use the software but would like to be involved in the community

Professional Organizations

- Build on SAA relationship
 - Training
 - Updates through RoundTable and conference presentations
- Forge relationships with other organizations
 - ALA
 - AAM
 - ???

For more information and to participate

- ArchivesSpace website
 - <http://www.archivesspace.org/>
- ArchivesSpace Google Group
 - <http://groups.google.com/group/archivesspace/>
- Github repositories
 - Development: <https://github.com/hudmol/archivesspace>
 - Releases: <https://github.com/archivesspace/archivesspace>
- Volunteer for beta testing
 - Email mark.matienzo@nyu.edu

Thank You!

QUESTIONS?

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