SUSTAINING ARCHIVESPACE

DLF Forum
Denver, CO
November 4, 2012
David Millman, Mark Matienzo, Katherine Kott
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

- Basic front & back end infrastructure (July/Aug)
- API, record edit, authentication, general import/export (Sept/Oct)
- Workflow, search, EAD import/export (Nov/Dec)
- All required import/export, UI templating & customization (Jan/Feb)
- Repository management workflow, user management workflow, reporting (Mar/Apr)
- Full application testing, beta release (May/June)
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)
Community Involvement

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 text 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_theme_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 both opportunity to re-use templates and design from the Staff interface as the specifications for both do have their similarities.

Thanks,
Payten Giles

(Member of the ArchivesSpace Development Team)
### Commit History

**Oct 13, 2012**

- **Path fix for Windows**  
  markriggs authored 3 days ago

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

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

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

**Oct 12, 2012**

- **fixed top level title bug and updated specs**  
  ldhoffman authored 4 days ago  
  markriggs committed 4 days ago
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

Miss Piggy papers

Basic Information

Title: Miss Piggy papers
Identifier: 1994 M 018
Accession Date: 2011-01-01
Content Description: Miscellaneous trolleys
Condition Description: Muddy

Subjects: Animals in human situations -- United States -- 20th century
Multiple Extent Statements

Extents

- Portion: Whole
- Number: 17.5
- Type: Linear Feet

Container Summary

Physical Details

Dimensions

Extents

- Portion: Part
- Number: 400
- Type: Photographic Prints

Container Summary

Physical Details

Dimensions
Multiple Date Statements

Label: Creation
Type: Inclusive Dates

Begin: 1972
End: 1984
Rights Statements

- Identifier: km1
- Rights Type: Intellectual Property
- Active: Yes
- 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

Description: 10 photographs of Kermit
Reason: They are unsavory
Disposition: Returned to Miss Piggy

Deaccession Date:
Label: Deaccession
Type: Single Date
Begin: 2012-10-28

Notification Given: Yes

Subjects

New Subject

Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animals in human situations</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
</tr>
<tr>
<td>20th century</td>
<td></td>
</tr>
</tbody>
</table>

- Cultural context
- Function
- Geographic
- Genre/form
- Occupation
- Style/period
- Technique
- Temporal
- Topical
- Uniform title

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

External Documents

Save Subject
Agents
Archival Description (Resources)

New Resource

Basic Information

Title: Muppet Show records
Identifier: ms 1

Subjects:
- Puppetry -- Archives
- Animals in human situations -- United States -- 20th century

Notes

Single Part Note

Label: Abstract
Type: Abstract
Content: Various scripts and lighting designs
Multi-level Description

- Isaac Ferris Papers
  - Archival Objects
    - 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 & Euclidian Societies, correspondence, clippings
      - Correspondence of Mrs. Morris P. Ferris
Instance and Location Management
## Event Records

### New Event

#### Basic Information

<table>
<thead>
<tr>
<th>Type</th>
<th>Decompression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outcome</td>
<td>success</td>
</tr>
<tr>
<td>Outcome Note</td>
<td></td>
</tr>
</tbody>
</table>

#### Event date

<table>
<thead>
<tr>
<th>Label</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Expression</td>
</tr>
<tr>
<td>Begin</td>
<td>2012-11-04</td>
</tr>
<tr>
<td>Begin Time</td>
<td>HH:MM:SS</td>
</tr>
<tr>
<td>Uncertainty</td>
<td>Inclusive Dates</td>
</tr>
<tr>
<td>Era</td>
<td></td>
</tr>
<tr>
<td>Calendar</td>
<td></td>
</tr>
</tbody>
</table>

#### Agent Links

<table>
<thead>
<tr>
<th>Role</th>
<th>Authorizer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent</td>
<td>Statler and Waldorf LLC.</td>
</tr>
</tbody>
</table>

#### Record Links

<table>
<thead>
<tr>
<th>Role</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record</td>
<td>Fuzzy Bear subject files</td>
</tr>
</tbody>
</table>
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/](http://www.archivesspace.org/)

- ArchivesSpace Google Group
  - [http://groups.google.com/group/archivesspace/](http://groups.google.com/group/archivesspace/)

- Github repositories
  - Development: [https://github.com/hudmol/archivesspace](https://github.com/hudmol/archivesspace)
  - Releases: [https://github.com/archivesspace/archivesspace](https://github.com/archivesspace/archivesspace)

- Volunteer for beta testing
  - Email [mark.matienzo@nyu.edu](mailto:mark.matienzo@nyu.edu)
Thank You!
QUESTIONS?

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