A Look Inside the New ArchivesSpace Technology & Development Roadmap

January 17, 2018 – Webinar
Presenter

Christine Di Bella

ArchivesSpace
Where We’re Going,
We Do Need Roads

A Look Inside the New ArchivesSpace Technology and Development Roadmap
Overview of Webinar

• What’s a technology and development roadmap
  – Why do we need one?
• Development planning process and how it relates to the roadmap
• Walkthrough of the new views
• What’s next
• Questions and feedback
What’s a Technology and Development Roadmap?

• Provides an overview of development work over a period of time
  – What work is planned
  – Who’s responsible
  – Where it is in the process
  – When it is forecast to be in the application

• Encompasses work users see in the application and work they don’t
Why Do We Need a Roadmap?

• Serves as a planning and communication tool for both the program and those using (or considering using) the application

• Useful for
  – Planning for upgrades
  – Determining next steps for a particular feature and when it’s likely to be available for use
  – Identifying ways to get involved in specific development projects
    • Working groups and writing requirements
    • Opportunities for community developers
    • Opportunities for contractors
The Development Planning Process and How That Relates to the Roadmap

• In conjunction with our development catalog JIRA (http://development.archivesspace.org)
  – Users report individual issues as well as submit larger projects or requests to the ArchivesSpace Program Team

• Development Prioritization subteam meets monthly to discuss issues and larger projects as appropriate

• ArchivesSpace program team determines likely timelines based on prioritization, project readiness and available resources
The Development Planning Process

- ArchivesSpace program team assigns developers
- Developers work under the guidance of the Tech Lead and Program Manager
  - Deliver development for testing by Testing subteam and others
  - When testing determines work is ready, it goes into a release
- ArchivesSpace program team updates the roadmap as releases come out and planning for individual projects progresses
- Iterative process
New ArchivesSpace Roadmap

• Our roadmap has evolved as our community – and the communication and planning needs around development – have grown

• Our new roadmap is a series of views generated from one Excel file to help different kinds of ArchivesSpace stakeholders
## ArchivesSpace Technology and Development Roadmap

Last updated: December 20, 2017

### Major Feature Enhancements/Functionality

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration tools</td>
<td></td>
<td>complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ASpace - co-op student Sarah Morrissey</td>
<td></td>
</tr>
<tr>
<td>Agents module expansion - multiple projects as follows</td>
<td>AR-1779</td>
<td>complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ASpace and contracted developer</td>
<td></td>
</tr>
<tr>
<td>*more control over merging of agents</td>
<td>ANW-183</td>
<td>complete</td>
<td>dev. in progress</td>
<td>Target release</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*allow admins to set additional required fields for agents</td>
<td>ANW-182</td>
<td>complete</td>
<td>dev. in progress</td>
<td>Target release</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*add agent fields and update views</td>
<td>part of AR-1779</td>
<td>complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ASpace contracted developer</td>
<td></td>
</tr>
<tr>
<td>*update agents importers/exporters</td>
<td>part of AR-1779</td>
<td>complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ASpace contracted developer</td>
<td></td>
</tr>
<tr>
<td>*agent synchronization/integration with SNAC and LCNAF</td>
<td>part of AR-1779</td>
<td>in process</td>
<td></td>
<td>Target release</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LCNAF plugin (enhancements) - perhaps part of agents?</td>
<td>AR-1732</td>
<td>complete</td>
<td></td>
<td>Target release</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yale</td>
<td></td>
</tr>
<tr>
<td>External authority database integration, including SNAC, AAC, VIAF</td>
<td>AR-1864</td>
<td>complete</td>
<td>SNAC requirements</td>
<td>Target release</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ASpace/SNAC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Redesign of staff interface, including better accessibility; will be broken up into individual projects with details to come</td>
<td>AR-1112</td>
<td>in process; recommendations due mid-December 2017</td>
<td>Target release</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*staff interface projects, with focus on accessibility recommendations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Views: Full Details

• Intended primarily for
  – Power ArchivesSpace users and developers

• Will be especially helpful for
  – Seeing the full picture of development being considered and worked on
  – Tracking a particular feature through the development process
  – Identifying opportunities for you or your institution to get involved in the development process
The Views: Annual Overview
The Views: Annual Overview

• Intended primarily for
  – Administrators, system administrators and others who need to know how ArchivesSpace application has evolved or is intended to evolve over a period of time but are less directly involved from day to day

• Will be especially helpful for
  – Planning for upgrades
  – Getting a big picture view of development for the year or another specified period of time
  – Providing a sense of level of activity to financial stakeholders when considering membership, hosting, or other outlays of funds
The Views: Release-Specific

### ArchivesSpace -- Summary of Enhancements

**Major Feature Enhancements/Functionality**
- *more control over merging of agents*
- *allow admins to set additional required fields for agents*

**Repair/Refactor**
- Reports -- additional improvements
- Data Dictionary vulnerabilities in dependencies

### Target Release (January 2018)

**Bug Fizes**
- Prioritized by Development
- Prioritization subteam -- details as available
- component scrambling prefix
- DO linking issue for PUI
- PUI indexer issues - admin info. and unpublished info. showing up in searches

**Minor Feature Enhancements**
- Prioritized by Development
- Prioritization subteam
The Views: Release-Specific

• Intended primarily for users and system administrators who want to know what is in – or planned to be in – each release
• Release notes will continue to be the fullest and more accurate representation of the actual releases
• Will be especially helpful for
  – Planning for upgrades
  – Comparing where you are now with the most current releases
  – Determining whether a particular release can be delayed/skipped or should be prioritized based on local interests/needs
## The Views: Impact of Enhancements

<table>
<thead>
<tr>
<th>ArchivesSpace -- Impact of Enhancements for FY 2017-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Major Feature Enhancements /Functionality</strong></td>
</tr>
<tr>
<td><strong>Repair Refactor</strong></td>
</tr>
<tr>
<td><strong>Bug Fixes</strong></td>
</tr>
<tr>
<td><strong>Minor Enhancements</strong></td>
</tr>
<tr>
<td>October 2017</td>
</tr>
<tr>
<td>November 2017</td>
</tr>
<tr>
<td>December 2017</td>
</tr>
<tr>
<td>January 2018</td>
</tr>
<tr>
<td>February 2018</td>
</tr>
<tr>
<td>March 2018</td>
</tr>
<tr>
<td>April 2018</td>
</tr>
<tr>
<td>May 2018</td>
</tr>
<tr>
<td>June 2018</td>
</tr>
</tbody>
</table>
The Views: Impact of Enhancements

- Intended for high-level administrators and others less involved with the application or with archives in general
- Will be especially helpful for
  - Giving a visual sense of the relative effort given to different categories of development and identifying releases that provide the most impact
  - Giving a visual sense of how actively the application is being developed
What’s Next/Where Else to Look

• Updated views will be posted after every release and previous views will be archived
  – Each release will continue to be accompanied by release notes that provide the most detailed listing of what’s in each release
  – All development will continue to be tracked in JIRA and GitHub – JIRA and GitHub are the places to report issues and commit specific code to address them

• We will be promoting specific development projects and issues for community involvement in other ways in addition to the roadmap
Questions? Feedback?
Thank you for joining us today!