

ArchivesSpace / Archon / Archivists' Toolkit Project Updates (SAA/August 2011)

ARCHIVSPACE

Planning phase (2009-2011)

- June 2009-Sept. 2009: AT/Archon merger agreement, project announcement and submission of planning grant proposal to Mellon Foundation
- Oct.-Dec. 2009: Drafting of high-level requirements and distribution to the community for comment; discussion and planning webinars; generation of prioritized requirements. (Available at www.archivesspace.org)
- Jan.-Feb. 2010: Planning grant awarded by Mellon Foundation; targeted areas are development of draft specifications; technical planning and sustainability
- Development of draft specifications. 14 specs currently available on ArchivesSpace website (Feb.-Aug. 2010)
- June-Aug. 2010: Technical planning, culminated in technical design meeting (June 3-4 in NYC). Meeting tied to high-level requirements document. Technical architecture report released July 2010.
- Nov. 2010: Survey administered by Chris Prom regarding implementation and deployment of open source archival management software.
- Dec. 2010-Jan. 2011: Interviews with archives staff performed by consultant Lisa Spiro; primarily focused on eliciting feedback from leading-edge and better-resourced institutions. Spiro's report was greatly informed by Ithaka sustainability report done for AT.
- Feb.-March 2011: Development of sustainability and business model desiderata by Beth Sandore (UIUC), David Millman (NYU) and Luc Declerck (UCSD).

Project dimensions

- Development of a new, unified system
 1. "Logical merge" of AT and Archon
 - a. Collection management/metadata authoring strengths of AT
 - b. Delivery and access and web authoring functionality of Archon
 2. Engineered for easier maintenance, administration, and extensibility
 3. Investigate the implementation of multitenancy, allowing hosting of multiple "clients" from a common installation of the software
 4. Enable interoperability and increased compatibility with other systems and applications (repository software, etc.)
 5. Released as open source, under the Educational Community License 2.0 – same license as AT
 6. Make extensive use of existing open source libraries that are compatible with the ECL
 7. Outstanding technical questions: Programming language; Framework; Database/persistence layer
- Migration of current AT and Archon installations to new system
- Selection of an organizational home that will assume the following responsibilities:
 1. Provide access to both a stand-alone version of the Software suitable for independent downloading by archives of all types and sizes, and a version of the Software that allows consortia, or large institutions, to host the Software on behalf of their constituencies;
 2. Facilitate ongoing Software maintenance and enhancements, including community contributions to the code base;
 3. Support a governance structure and a fee-based membership structure that supports recommendations from the governance groups about the ArchivesSpace system, sustains the code base and distribution, maintains documentation, provides help desk support, and promotes ongoing communication within the ArchivesSpace user community;
 4. Encourage the development of a healthy ecosystem of partners (commercial and non-commercial) that will provide additional and/or custom supporting services for ArchivesSpace.

Work plan

- Organizational, Governance, and Sustainability Planning
- Background and logistics (March 2011–Sept. 2011) –admin processes, tools, establishing meetings, etc.
- Data Model (April 2011–Oct. 2011)
- Programming Procurement (May 2011–Dec. 2011)

- Organizational, Governance, and Sustainability Home Finalized (July 2011–Dec. 2011)
- Core Programming (Jan. 2012–May 2012)
- Activate Governance Body (Jan. 2012–June 2012)
- Archives Functional Programming (April 2012 – Oct. 2012)
- Identify and Select Operational Support Plan (July 2012 – Jan. 2013)
- Import/Export/Reports (Aug. 2012–Nov. 2012)
- Build Management and Usability Testing (Mar. 2012–Feb. 2013)
- Develop Marketing, Communication, and Outreach Plan (June 2012–Feb. 2013)
- Beta Testing and Rollout (Nov. 2012–Feb. 2013)
- User and System Documentation (June 2012–Feb. 2013)
- Support for the migration of existing AT/Archon installations (June 2012–Feb. 2013)

Project Team

Steering Committee: (Luc Declerck, Beth Sandore, David Millman); Technical Architect (Mark Matienzo) ; Development Manager (Katherine Kott) ; Archivists (Chris Prom, Scott Schwartz, Brad Westbrook) ; Senior Software Developer (Joe Pawletko) ; Build/Release Management Team (Brian Tingle, Adrian Turner) ; Migration Facilitators (Nathan Stevens-AT; TBA-Archon) ; End-User and Systems Documentation Specialist (Annie Ross)

Technical Review Team: Technical Architect, Development Manager, Archivists, Senior Software Developer
Developer: (RFP to be issued)

Consultants (all TBA): Build/Release Support Technician, Usability Testing/Interface Design, Code reviewer, Marketing consultant

Community resources: AT/Archon Roundtable, Developers of open source archives/library/museum/higher ed software

ARCHON

Download the latest version at <http://archon.org/>. User support at <http://forums.archon.org>

Maintenance Releases: See change log at <http://forums.archon.org/viewtopic.php?f=4&t=756>

Archon 3.13 (Sept. 2010)—Reduced finding aid load times; added support for Google Analytics and the ability to batch export EAD and MARC records; improved session handling; replaced static database tables (e.g. language and country codes) with JSON files; and made several improvements to the public themes and improved digital library importers

Archon 3.14 (Jan. 2011)—Improved creator/name management/linking; improved the EAD importer; added ability to invoke URLs so an external system can ingest/delete collections in a way that is secure; fixed HTML errors in digital content templates; fixed digital library bug that prevented file uploads in some cases; added Spanish translations to AvSAP admin help files; and added some new configuration options.

Archon 3.20 (May 2011)—Implemented a greatly improved administrative/staff interface (new model for managing hierarchical data and relating objects, added support for IE, and added inline markup options) and several other bug fixes.

Archon 3.21 (July 2011)—updated external libraries used by the user interface (e.g. JQuery); implemented an improved transfer interface; added finding aid and digital object caching to improve page load times; implemented automatic reciprocity in creator relationships (e.g. parent to child); and several other bug fixes.

Training: SAA-sponsored webinar: Archon ...making it work for you!, May 12, 2011 (Chris Prom/ Scott Schwartz) and Implementing DACS in Integrated Content Management Systems: Using Archon held University of Miami, August 2010 (Kyle Rimkus/Scott Schwartz); Luther College, May 2011 (Chris Prom/Scott Schwartz).

Other: We developed a Python script that exports all digital objects stored as binary objects in the Archon database and save them in a local folder. See <http://forums.archon.org/viewtopic.php?f=0&t=991&p=2755>. During the migration phase of the ASpace project, a similar tool will be developed for digital content metadata.

Personnel: Paul Sorensen accepted a full time position with another employer in July 2011, but continues to contribute to Archon maintenance on an hourly basis.

ARCHIVISTS' TOOLKIT

Download the latest version: http://archiviststoolkit.org/download/release/2_0 User support at atug-l@mailman.ucsd.edu

Maintenance releases:

AT2.0 update 7 (Sept. 2010) – Included a reconfiguration of the Hibernate middleware to address the timeout issue between the AT application and the backend server. Thanks to the assistance of staff at Stanford University libraries, University of Kentucky libraries, and UC San Diego libraries for their help in testing bug fixes.

AT2.0 update 8 (Oct. 2010) – Thanks to the Duke University Medical Center Archives staff for their assistance in testing AT 2.0 update 8 maintenance release.

AT2.0 update 9 (Oct. 2010) – Included support for an internal database based on HyperSQL 2.0 (HSQLDB). Information on how to set up and how to use the internal database option can be found at: <http://archiviststoolkit.org/sites/default/files/FAQs%20for%20ATInternalDB.pdf>

AT2.0 update 10 (Dec. 2010) – This release included a spell-checker and support for authentication plugins.

AT2.0 update 11 (Aug. 2011) -- Provides support for MySQL version 5.5.x and the JRE that is bundled with the AT for Windows download to the latest version (Java 1.6.0_25). In addition, users will now be notified when the application has been timed-out by the host server by a custom dialog box, rather than triggering the bug tracking system ('Connection error: Database Connection Lost ... Please RESTART the program and contact your System Administrator if this problem continues.')

Community development:

Multiple Extent plug-in (Harvard Univ, August 2011): An extension of BYU's Multiple Date and Physical Description custom panels plug-in and was created to handle the variety of container and media types that comprise archives collections. (see <http://archiviststoolkit.org/node/251>)

BatchDO2 plug-in (NYU, July 2011): Automates the workflow for the creation and linking of digital objects to resource components and transfers barcodes places in the "Instance Type" field into the "Barcode Field". Tailored for NYU, but most of the functionality can be used by other institutions. (see <http://archiviststoolkit.org/node/246>)

Sample LDAP Authentication plug-in (AT Dev Team, Dec 2010): Illustrates the use of new authentication extension to the plugin framework added in AT 2.0, update 10. This can serve as a starting point to implementing your own plugin, but is likely functional out of the box, since it simply tries to authenticate through a LDAP server. (see <http://archiviststoolkit.org/node/220>)

ATReference Project (Rockefeller Archive Center, May 2011): ATReference is an extension of the source core code of the AT that supports the management of reference related activities in an archival setting, including registering patrons, recording visits and topics of research, and tracking researcher statistics and research products. For information, visit the github site: <https://github.com/RockefellerArchiveCenter/ATReference/wiki>

Training:

AT staff held a number of workshops including AT for SCA for Southern California (Oct 2010) and AT for SCA for Northern California (Oct 2010), San Diego History Center (April 2011), Black Metropolitan Consortium (Chicago, June 2011), a webinar for SAA (July 2011), and a SAA sponsored pre-conference workshop this week in Chicago. SAA-sponsored AT workshops are tentatively scheduled for Sept.26 & 27 in Washington, DC and Dec. 5 & 6 in Claremont, CA. Also, a one-day workshop is scheduled for Sept. 30 in San Francisco, sponsored by the Society of California Archivists, and will focus on using the AT to model and produce digital object records.