



# Testing ArchivesSpace

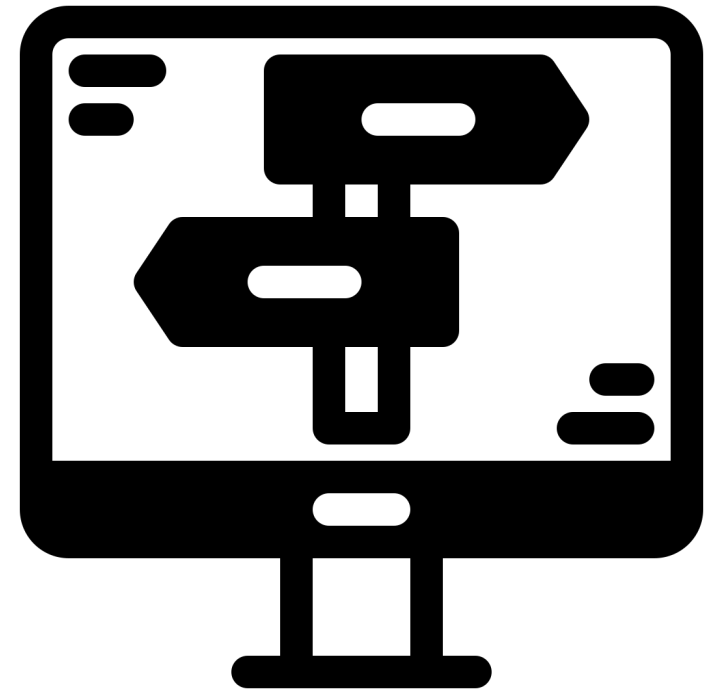
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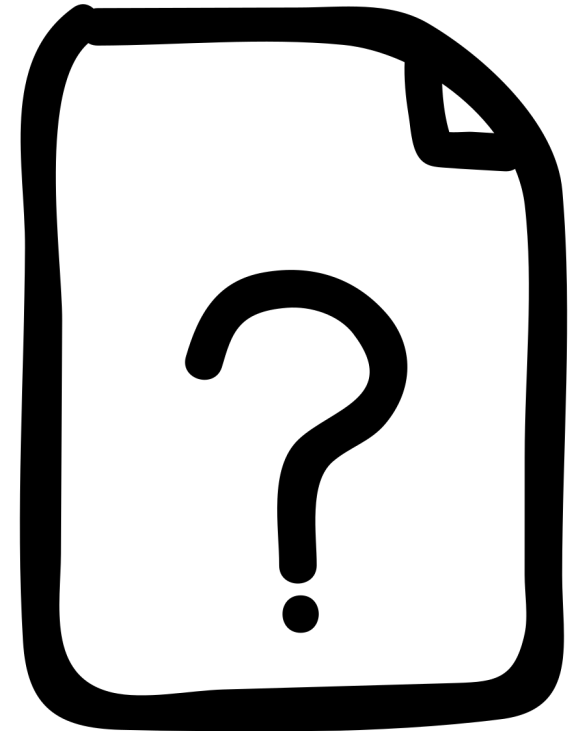
# Full Application Testing – AKA Regression Testing

- We test each major section of ArchivesSpace to make sure that any changes to that section haven't broken existing workflows and functionality.
- Each tester gets 3-4 sections to test and we try to rotate assignments so that any one tester doesn't always get a large/complex section to test.
- We assign two testers to each section
- Each tester tests as an administrator and (preferably) with a different permission level (e.g. a basic data entry user)



# What are the sections? As of v3.2.0

- Accessions
- Resources
- Spreadsheet Importers
- Custom Reports
- PUI
- Containers
- Digital Objects
- Built In Reports
- Agents
- Subjects
- Background Jobs
- Application Management
- Repositories
- Assessments
- Locations
- Rights Management
- Users
- Events
- Collection Management





**Accessions Functions - permission level: [admin ]**

Browse Accessions
View Accession (from Browse list)
Edit Accession (from Browse list)
Edit Default Values
Create Accession (from Browse list)
Delete Accession
Sort results
Faceting
Filter by text

**Create Accession (from Create menu)**

Enter information into all basic information fields
Save - try to save once without required information, once with
Lefthand navigation - clicking on a section leads to the expected place, if there are multiple entries in a section, number is indicated

**Accession Toolbar functions - indicate the buttons that appear for your level of privileges in the notes area**

Add Event - add 5 kinds of events, note any issues
Spawn - are you able to do it and are the fields you expect carried into the new record
Accession
Resource
Transfer
More functions
Calculate Extent
Create Assessment
Suppress
Delete

**Instances**

Add a container instance
Create a Top Container
Link to Container Profile
Record Top Container Indicator
Link to Instance Container record
Browse Top Container(s)
Type ahead to locate Top Container(s)
Add child level container type / indicator
Add grandchild level container type / indicator
Save Instance / Container
Edit Instance / Container
View Top Container record
Edit Top Container record
Save Top Container record
List Linked Records
View Active Restrictions
View Linked records
Edit Linked records
Go to Search Results
Delete Top Container Record
Remove / Replace Top Container record
Remove Instance / Container

**Add a digital object instance**

**Agent Functions - permission level: [admin ]**

Browse Agents
View Agent (from Browse list)
Edit Agent (from Browse list)
Add Required Fields
Person
Family
Corporate Entity

**Software**

Edit Default Values
Person
Family
Corporate Entity
Software
Create Agent (from Browse list)
Person
Family
Corporate Entity
Software

**Delete Agent**

Sort results
Faceting
Filter by text

**Create Agent (from Create menu)**

For each type, enter information into at least 5 sub-records
Save - try to save once without required information, once with
Lefthand navigation - clicking on a section leads to the expected place,

**Agent Toolbar functions - indicate the buttons that appear for your**

Light Mode
Add Event - add 5 kinds of events, note any issues
Publish All
View Published

Download EAC-CPF
Download MARCXML Authority

Merge
Delete

**LCNAF plugin**

LCNAF
LCSH

**Container Functions- permission level: [ ]**

**Manage Container Profiles (System menu)**

View Container profile
Edit Container profile
Sort results
Faceting
Filter by text
Create Container profile
Delete Container profile

**Merge Container Profiles (from Browse menu)**

**Manage Top Containers (Gear menu)**

Search for containers
Keyword
Barcode(s)
Resource
Accession
Container Profile
Location
Exported to ILS
Unassociated Containers
Has Location

**Work with search results**

Sort results by column headings
View top container
Edit top container

**Bulk Operations**

Select/unselect one or more containers from results
Select/unselect all results
Update ILS Holdings IDs
Update Container Profiles
Update Locations: Single Location
Update Locations: Multiple Locations
Rapid Barcode Entry
Delete Top Containers
Merge Top Containers

**Subject Functions - - permission level: [admin ]**

Browse Subjects
View Subject (from Browse list)
Edit Subject (from Browse list)
Edit Default Values
Create Subject (from Browse list)
Delete Subject
Sort results
Faceting
Filter by text

**Create Subject (from Create menu)**

Enter information into all basic information fields
Save - try to save once without required information, once with
Lefthand navigation - clicking on a section leads to the expected place, if there are multiple entries in a section, number is indicated

**Subject Toolbar functions - indicate the buttons that appear for your level of privileges in the notes area**

Merge
Delete

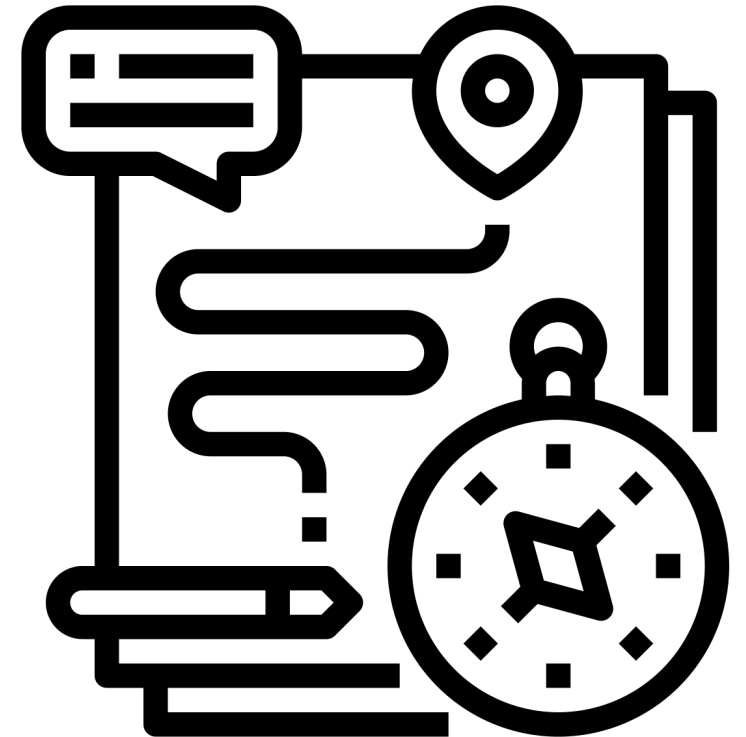
# Testing - Why?

- Make sure your daily workflows are not disrupted
- Learn about new options in the application
- Learn about options in ArchivesSpace that you've never used before but might be useful
- Make sure that your data remains intact and any updates don't cause issues (e.g. dates issue in latest releases)
- Find issues that may impact other users and report them. Help the community (JIRA!)
- Test your customizations (plugins, workflows) and update them



# Testing - Benefits

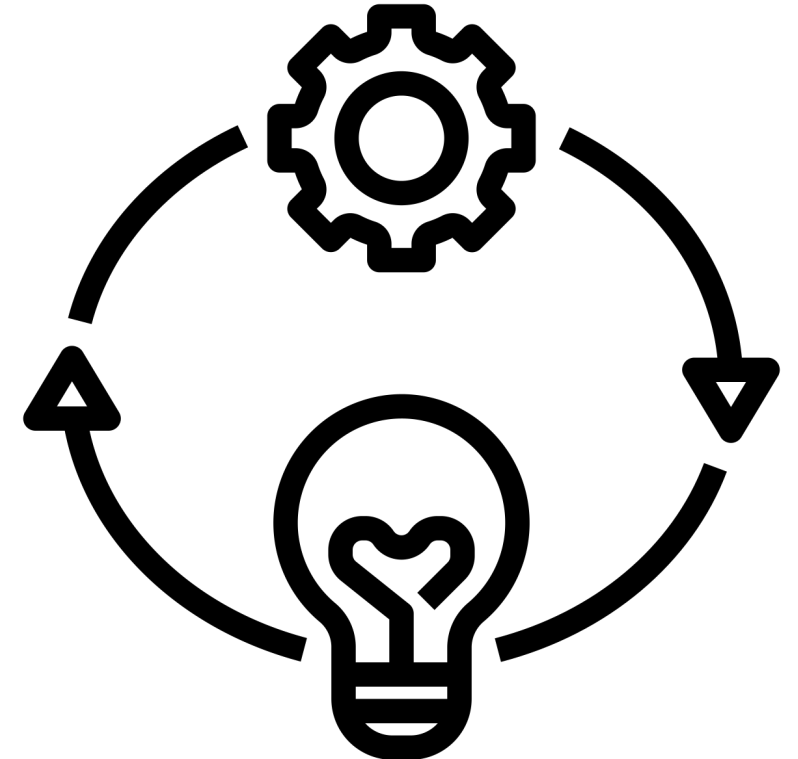
- Learn about new options in the application
- Learn about options in the app that you've never used before but might be useful to your institution:
  - Evaluate how you want to use them locally
  - Inform your local users
  - Update your local documentation
  - Example: expanded agents module





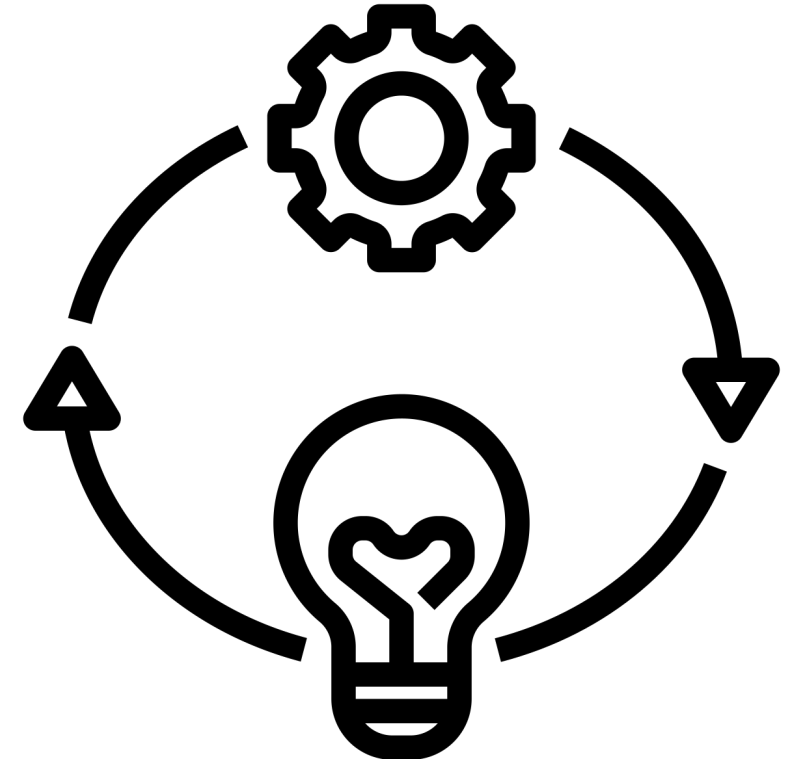
# Testing Resources

- The spreadsheets the testing team uses are all available:  
<https://archivesspace.atlassian.net/wiki/spaces/AC/pages/38502432/Testing+Sub-Team>
- We update the list whenever a new major version of ArchivesSpace is released.



# Testing @ Dartmouth

- As with NYU, we test to ensure that everything works like it should. We \*tend\* to be a release or two behind the latest release.
- Application responsiveness
- New features
- Plugins (we have a lot). I spend a lot of time ensuring that our plugins work as expected with the latest release.
- Workflows
- I test locally first, then we have development and pre-prod instances where we test until final release in production







# Discussion

How do you test your local (or hosted) instance of ArchivesSpace?

Do you have a formal testing process?

How many staff members are involved?

How much time do you usually budget for testing?

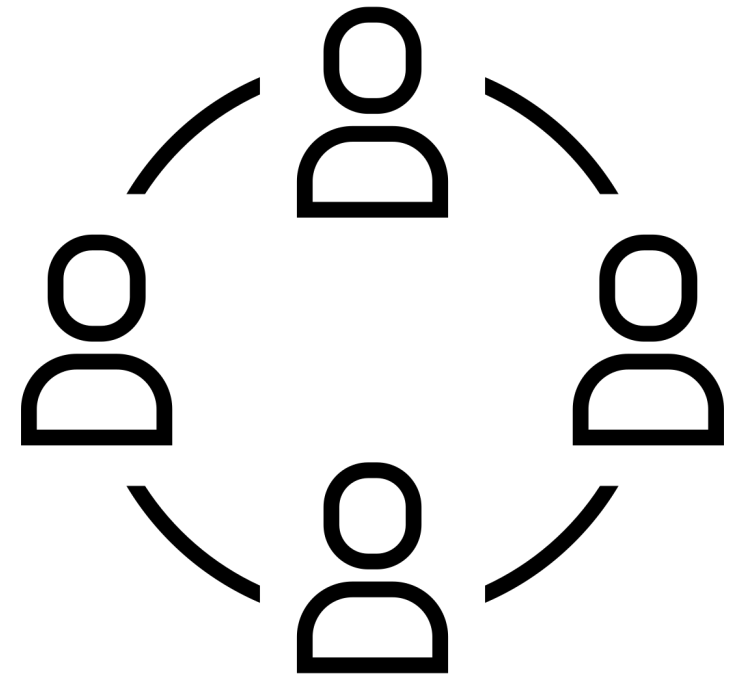
Have you found that testing leads to new ideas for workflows?

Have you been poking around in the application and found something you didn't know about but have now adopted as part of your workflow?

Are you familiar with JIRA?

Have you ever added or commented on a JIRA ticket?

Do you find the descriptions in JIRA tickets useful? If not, what would you change?  
How would you prefer to see an issue or feature request described?





Thank you!

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All icons from the Noun Project.

