

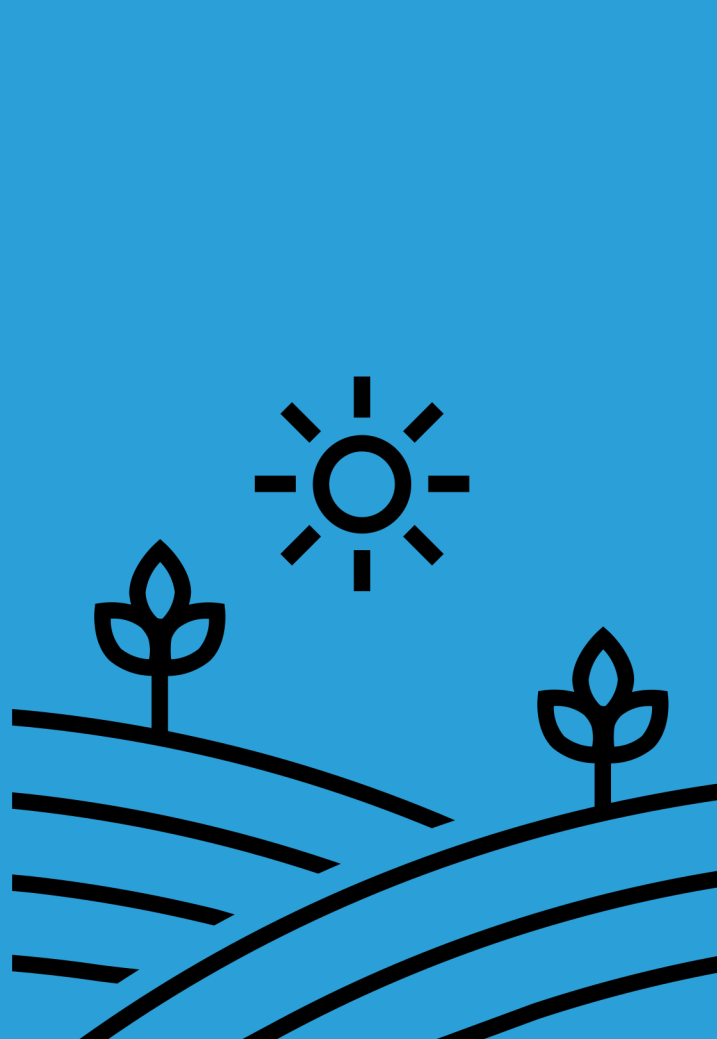
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Aspace Member Forum  
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Boston

# Updates and a Culture of Change

- Think back to your workflows *before* you adopted Aspace
- I bet that most of those workflows were relatively stable for long periods
  - If you used Archon, Archivists' Toolkit, or the EAD Cookbook, those applications and practices stayed the same for a loooooooooooooong time
  - You may have established and invested in a **decade+** of practice that was comfortable and predictable.
- But ArchivesSpace has changed, is changing, and *will always change*.
  - Frequently! 3.3.0-RC1 is available right now!
- You might miss that comfortable old groove, or you may still be in one

- Changes to Aspace can be both **technical** as well as **functional**
- By **functional** I mean a new feature, like top container merging or the spreadsheet importer or new support for EAC or a new subrecord
  - These have impacts on staff or student training
- By **technical** I mean changes to the code you cannot see, including how pages render, configurations removed or added, and deeper infrastructure changes an average user will never detect
  - These have impacts on plugins, theming, and sometimes come with decisions
- Frequent version releases means changes in both these categories

- This presentation is a series of prompts followed by suggestions for your consideration
- I will be encouraging you to:
  - **Accept** a culture of change
  - **Actively prepare** for change
  - Identify what you wish to **improve** about your update workflow



# Your Update Landscape

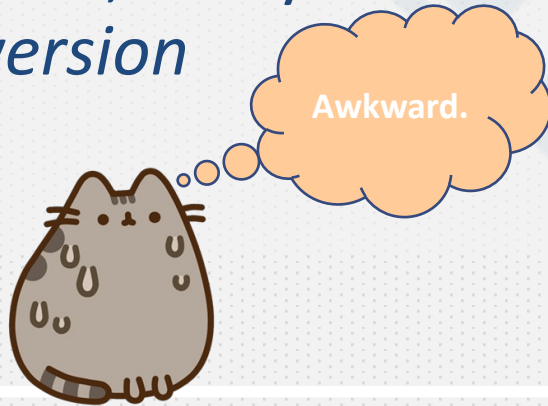
Let's start with the basics:

- How do you **hear** about updates?
  - Do you usually hear about them before a release, or after?
- Who makes the **decision** to update and when?
  - Is there one person in your workplace that makes that call, or a group?
  - Does that decision get made for you by your service provider or IT Person?
- How **often** do you update?
  - Every new version?
  - When you hear about a cool thing?
- **Do you feel prepared for updates when they occur?**

- Do you track changes to AS and whether those changes will impact your workflows?
  - Proactively?
  - Or reactively?
- Does staff you meet to discuss or coordinate forthcoming updates and changes to workflows?
- Do you schedule re-training or new training when updates come out? Proactively or reactively?

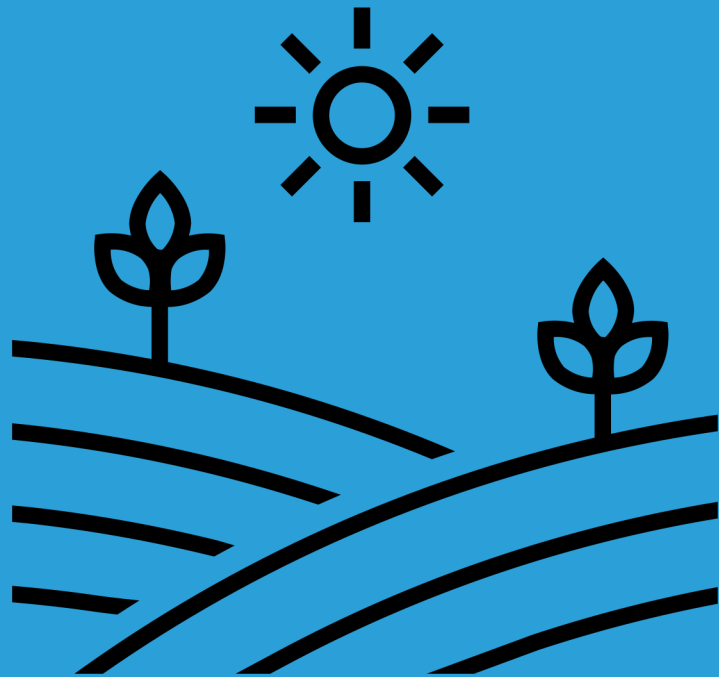
## Updates and Change

- Has anything ever broken for you during an update? Did it cause a significant **disruption**?
- Have you fielded questions about new features and did you know the answers?
- Do you know there's an AS Roadmap?
  - Keyword search terms: *archivesspace roadmap*
- And of course, everyone reads the release notes multiple times *in detail* for *every version*
  - ...right?





# Your Aspace Landscape



- Do you know what **version** you're on? Is that the most recent?
- Do you have a **Sandbox**?
  - I don't mean THE Sandbox at <https://sandbox.archivesspace.org>
  - I mean one with your data and your configurations
- Do you know what **plugins/theming** you have installed?
  - Do you test your plugins after each update?
  - Do you remove plugins when plugins get folded into code?
- Do you know what **configurations** you have in place?
  - Do you test your configurations?
- Do you have a custom PDF **stylesheet**?




# Suggestions!

- Were you happy with your answers? Was there **frustration** there?
- The first piece of advice is to answer those and identify which questions you wish you had better answers to, and which don't matter
- And now here comes way too many suggestions after way too many questions!

**Suggestion:** Consider a **sandbox** if you don't have one already

- I would never live without one and this is my first suggestion
- *But make sure that sandbox is a real mirror*
  - Same configurations, same plugins, same everything
- How do you get one? This question would be directed to whoever manages your current instance of Aspace. If you have a hosting provider, they likely offer one
- Do you know about <https://test.archivesspace.org>? This is where new code is available at all times


**Suggestion:** Consider testing **release candidates** if you don't already

- **On a Sandbox!** 
- This benefits *everyone*: the earlier problems are known, the better
- Testing RCs with real data is seriously helpful to the community
- AND
- Testing RCs gives you a vital preview of any issues with plugins, branding, or the need for training ahead of the formal release
- ...as long as you test it *thoroughly*

### Suggestion: Read the **release notes**!!

- You might not understand everything that's there, and that is *fine*.
- But please read them.
  - See the community at work by reading about community contributors and pull requests
  - Tip your cap to the program team, devs, councils, and core committers
- Celebrate **windfalls** or improved workflows by knowing the details of every release
- But also **anticipate concerns** or complications by reading about new requirements, new configurations, and all I mentioned today

**Suggestion:** Maintain an **update checklist** of steps to take when preparing for and assessing an update

- Assign or share responsibility for the checklist
  - I get to say that because I don't work where you work 
- Embrace the fact that this will repeat and will repeat *often*
- *And if I were making a checklist it might be these next few slides...*



**Suggestion:** Maintain and check a list of **plugins** and their behaviors

- List every plugin on your Production server and your Sandbox
  - You will again get this from your hosting provider or IT person
- Check each plugin's source page for version and compatibility information, if available
- Determine what each of those plugins *do*
  - After years of use and onboarding, staff might not realize the differences in functionality of core code versus plugins
  - For example, after years of using **timewalk**, you would be rudely surprised to learn that AS does not automatically parse dates
  - But would you notice if it stopped working?
- Determine how to *test* each of the plugins on the list
  - What's a quick way to know your plugin still works the way you expect?

- Most plugins will come from the community
- But some may have been developed in-house, and in-house plugins are usually related to **branding/theming**
- These are at risk when the code behind pages changes, especially the PUI
- This is usually for good reasons, like improving accessibility or new feature requests
- If you have **in-house plugins**, where does that code live?
- Who wrote them? Do they still work where you work? Do *they* read the release notes?

## Release notes!

Also, please note that the following commonly overwritten/plugin-modified files have been updated in this release:

```
frontend/app/views/shared/_header_global.html.erb  
frontend/app/views/shared/_header_user.html.erb  
frontend/app/views/shared/_login.html.erb  
frontend/app/views/welcome/index.html.erb  
public/app/views/containers/show.html.erb  
public/app/views/objects/show.html.erb  
public/app/views/resources/infinite.html.erb  
public/app/views/resources/show.html.erb
```

You may need to update any plugins that override these files.

From the v2.8.0 release notes

### Suggestion: Maintain and check a list of **vital workflows**

- For example, do you *export* as part of your workflows? To MARC or EAD?
- Surely those standards won't change...right? They're *standards*.
- The next presentation proves this isn't true
- Importers and exporters change!
- Unless you're confident that you know every single change in code, test every single aspect of your workflows
- This means testing whatever your staff are dependent on, even exports

### Suggestion: Check in on preferences and permissions

- New features sometimes come with new permission options
  - New Agents module and Custom Reporting are both examples of this
- Re-visit your permissions and users after updates or on a semi-annual basis
- Updates also bring changes to the preferences menu (including 3.3.0)

Suggestion added after the Forum: Existing testing checklists!

- **Link to the ArchivesSpace Testing Subteam's Testing Worksheets**  
<https://archivesspace.atlassian.net/wiki/spaces/AC/pages/38502432/Testing+Sub-Team>
- **Discussion Session from Online Forum 2022: Testing the ArchivesSpace application** | [Recording Available](#) | [Slides Available](#)

Abrupt Ending!



And remember!

Without change, we wouldn't get to see kittens turn into cranky old cats!