Strategic Planning

This page is the homepage for all yearly DSpace strategic planning activities led by the DSpace Steering Group in conjunction with other Project Teams, including but not limited to: DSpace Committers, DSpace Community Advisory Team (DCAT), and the DSpace Leadership Group.

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2020 Strategic Planning Activities

Summary

In 2020, with support from LYRASIS and DSpace Governance, DSpace 7 moved to a "Staged Beta Release Process" (described at DSpace 7 Release Goals). This process established a series of Beta releases which would provide early previews of new features (each Beta would layer new features on the next). To compliment the Staged Beta Release Process, Governance raised funds to support some paid development on DSpace 7.

Deliverables

- Release Planning:
  - New DSpace 7 Release Goals were documented, including the Staged Beta Release Process
  - Migration of all release planning to GitHub using DSpace 7 Project Boards
- A total of 4 Beta Releases were released in 2020:
  - 7.0 Beta 1 on March 3
  - 7.0 Beta 2 on April 20
  - 7.0 Beta 3 on July 2
  - 7.0 Beta 4 on Oct 12

2019 Strategic Planning Activities

Summary

In 2019, the first early release of DSpace 7 came out (called the DSpace 7 Preview Release). This release concentrated on showing off the basic features of a new UI & REST API (including an early preview of Configurable Entities). In late 2019, the DSpace 7 Entities Working Group (2018-19) completed its implementation of the Configurable Entities feature and disbanded. Also in late 2019, DSpace Governance finalized a new "Staged Beta Release Process" for DSpace 7, to begin in 2020 (see 2020 activities above).

Deliverables

- In May, the DSpace 7 Preview Release was unveiled, featuring basic functionality (new REST API, new UI, redesigned submission, early preview of Configurable Entities).
- In June, DSpace had a entire series of DSpace 7 related workshops/presentations at the OR2019 conference.
- In Dec, the DSpace 7 Entities Working Group (2018-19) completed its implementation of Configurable Entities for DSpace 7 & developed early documentation at: https://docs.google.com/document/d/1wEmHirFzrY3qgGtRr2YBQwGOvH1IuTVGmxDIdnqvwxM/edit

2018 Strategic Planning Activities

Summary

In 2018, the DSpace 7 Working Group (2016-2023) designed and developed the new Angular UI and REST API for the DSpace 7.0 release. In parallel, the DSpace Entities Working Group (2017-18) analyzed options for enhancing the DSpace data model to support additional "entities" (typed objects) & made recommendations back to Governance. The DSpace Steering Group released a statement in favor of moving Configurable Entities forward based on the recommendations from the Entities Working Group, therefore establishing a new DSpace 7 Entities Working Group (2018-19) to implement the Entities feature.

Deliverables

- DSpace 7 Presentations / Workshops
  - DSpace 7 Update at OR2018
  - DSpace Angular UI Workshop at OR2018
- DSpace 7 Working Group (2016-2023) has produced the following deliverables in 2018:
  - DSpace 7 Development Planning spreadsheet : details, at a higher level, the tasks in progress, completed and to-do for the DSpace 7 release.
  - DSpace 7 Community Sprints: Planned and scheduled three DSpace 7 community sprints, to get other community members trained and contributing to the DSpace 7 development efforts.
- DSpace Entities Working Group (2017-18) has produced the following deliverables in 2018:
  - DSpace Entities Overview / Analysis document for community feedback and Steering Group feedback

2017 Strategic Planning Activities

Summary

In 2017, the DSpace 7 Working Group (2016-2023) was established to formalize the process of building a new Angular UI and REST API for the DSpace 7.0 release.

- Early in 2017, this DSpace 7 team concentrated on planning out the architecture (especially for the enhanced REST API) and building the "framework" for the Angular UI.
- In parallel, a DSpace 7 UI Outreach Group was established to help with outreach, and update/capture use cases needed to be met by the new UI. See: Use Cases

In late 2017, the DSpace Entities Working Group (2017-18) was also established to analyze options for enhancing the DSpace data model with additional "entities" (objects), for improved integration with CRIS systems and external identifier systems (e.g. ORCiD).

Deliverables

- DSpace 7 Working Group (2016-2023) produced the following deliverables in 2017:
  - DSpace 7 UI Mockups - Early mockups of UI screens, reviewed by DSpace 7 Marketing Working Group (2016-2020) and DCAT
  - DSpace 7 REST API Contact - Work in progress contract for the new REST API
  - Training workshops at OR2017 DSpace Angular Workshop and DSpace North American User Group meeting
  - Development is ongoing, with Angular UI and REST API demo sites available (see group's wiki page)
- DSpace 7 Marketing Working Group (2016-2020) produced the following deliverables in 2017:
  - DSpace 7 UI Project Plain Language Summary

2016 Strategic Planning Activities

Summary

In early 2016, the DSpace UI Prototype Working Group (2015-16) has been working with UI prototype developers (from DSpace UI Prototype Challenge) and DSpace Committers to analyze User Interface platforms and recommend a single platform to build the next DSpace UI (as a replacement to both the XMLUI and JSPUI). This new User Interface is planned to be initially released in DSpace 7.0 (timelines TBD).

Deliverables

- **DSpace UI Prototype Challenge** : Details the UI Prototype Challenge entries (including documentation and code/project links). Video demonstrations and Q&A with all developers is also available.
- **DSpace UI Prototype Evaluation Form**: Public feedback form which was used to gather feedback from Working Group members, Committers and anyone on mailing lists (who offered feedback)
- **DSpace UI Working Group Summary**: Summary of the UI prototype discussions and analysis (based on Evaluation Form and Video demos, etc), along with details about the potential UI platforms.

2015 Strategic Planning Activities

Summary

In 2015, the DSpace Steering Group established an ad hoc "DSpace RoadMap Working Group" (made up of members of Steering, Committers, and DCAT) to develop a 3-5 year Strategic Plan for Technology along with a shorter term (1-2 year) Technical Roadmap detailing how we can immediately improve the software towards achieving our Strategic Plan. Out of that work, a new User Interface was deemed the highest priority, near-term need on the DSpace RoadMap

In late 2015, an ad hoc DSpace UI Prototype Working Group (2015-16) was established (by DSpace Steering Group), and they organized a DSpace UI Prototype Challenge, to begin the process of prototyping / selecting a new User Interface platform.

Deliverables

- **Strategic Plan for DSpace (for 2015-2018)**
    - DSpace 2015-18 Strategic Plan - Technology : Based on the 2013 Vision Document and the 2014 Product Plan work, a formal (3-5 year) Strategic Plan for the DSpace platform technology will be developed for discussion at OR15. This Strategic Plan for Technology will lay out action items we will take to achieve the goals laid out in these two foundation documents
    - DSpace 2015-18 Strategic Plan - Community : A Strategic Plan for Community Development goals and activities
    - DSpace 2015-18 Strategic Plan - Sustainability : A Strategic Plan for Product/Project Sustainability goals and activities
- **Technical RoadMap for DSpace (for 2015-2016)** : Based on the actions and goals laid out in the Strategic Plan (along with the Use Case Analysis), a short term (1-2 year) Technical Roadmap will be developed for discussion at OR15. This Technical Roadmap will detail specific, high-priority implementation projects (i.e. code/UI improvements) which will help the DSpace platform to move in the direction laid out by the Strategic Plan.
- DSpace UI Prototype Challenge : The new User Interface prototype challenge announcement and entries.
- Additional documents of interest:
    - Use Cases : Continuing from the 2014 work, the DSpace Community Advisory Team (DCAT) hosted further meetings to gather community Use Cases and began prioritization of these use cases.
    - Use Case Analysis : Analysis and prioritization of the gathered Use Cases.

2014 Strategic Planning Activities

Summary

In 2014, the DSpace project teams concentrated on establishing a formalized Governance model, ran a "Vision Survey" to gather needs/use cases from the user community, and compiled an early list of Use Cases based on the survey responses. We also began work on an early "Product Plan" which detailed feature/use case priorities based on the survey results. The survey results, an early Product Plan, and the Governance model were all presented at OR2014 in a session titled "The Future of DSpace"

Deliverables

- Project Governance : DSpace formalized its Project Governance model, establishing a DSpace Steering Group and a DSpace Leadership Group, while also formalizing existing Working Groups such as DCAT and Committers. For more details of the roles/responsibilities of each group, also see Project Teams.
- DSpace 2014 Product Plan : An initial, high level plan of use cases / features that DSpace should strive to achieve. This Product Plan was based on the results of the (early 2014) "Vision Survey". It was developed by an temporary Product Planning Group, made up of representatives of DCAT, Committers and the Steering Group.
- Use Cases : Based on the 2014 Vision Survey, and Product Plan, the DSpace Community Advisory Team (DCAT) held a series of meetings to gather community Use Cases
- "The Future of DSpace" session at OR2014 summarized the above documents as well as the Vision Survey results.

2013 Visioning Activities

Summary

In 2013, an ad-hoc "Vision Team" began discussions and brainstorms around what the goals and priorities of the DSpace platform should be in the coming years. This resulted in a high-level, five point Vision Document, which was presented at OR2013 and developed into a Vision Survey in late 2013 / early 2014.

Deliverables

- DSpace 2013 Vision Discussions : Details the initial "Vision" discussions that took place in 2013, to brainstorm out a longer term Vision for the DSpace platform. Also details the (early 2014) "Vision Survey" which gathered feedback on the vision, and possible use cases for the DSpace platform going forward.
    - DSpace 2013 Vision and Roadmap Meeting - Notes from the two-day kickoff meeting that began these Vision discussions
- DSpace 2013 Vision Document : The 5-point Vision Statement for DSpace. Also available as a PDF presentation
- "DSpace RoadMap & Vision" session at OR2013 summarized the five point Vision. It was also later turned into a 30-minute screencast on YouTube.