ArchivesSpace Joint Quarterly Report: September - November 2019

Technical Advisory Council and User Advisory Council

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Executive Summary

This, the first joint TAC-UAC quarterly report, reflects the increasingly close collaborative nature of these two councils, and functionally replaces the two separate reports produced in quarters' past. Of particular note for the period, September-November 2019, is the important preliminary work done to consider sub-group structure (two new ones and an ad-hoc working group were formed) and to assign members to groups, including where possible cross-germinating the subgroups with representatives from both UAC and TAC. The changing nature of the workgroups responds to and reflects community priorities, particularly an increasingly attentive eye toward integration and interoperability. The creation of administrative documentation by joint TAC-UAC leadership, including defining roles and responsibilities, developing guidelines for non-participation and changes, and documenting timelines and workflows, are important steps to ensuring smooth leadership transitions and active and full participation by all council members.

Council Reports

Joint Council updates

- After TAC and UAC held a [joint onboarding meeting](#) in August, all Council members were asked to indicate via a [survey](#) their interest in leadership and what sub-teams they wished to join. UAC and TAC leadership met several times in August and September, and followed up with members individually before finalizing sub-teams and task forces.
- UAC sunsetted the Reports sub-team and created a new Usability sub-team, which will subsume continuing Reports work as well as lead other usability work. TAC sunsetted the Migrations sub-team and created a new Metadata Standards sub-team as well as an API Ad Hoc Working Group. So far, TAC/UAC integration on sub-teams is going well. The Councils will meet jointly biannually, with the next such meeting tentatively scheduled for February.
- The TAC/UAC Coordinating Committee met on [October 18](#) to discuss collaboration, documentation, and resignations.
- TAC and UAC leadership, in coordination with Christine Di Bella, Kat Stefko (UAC liaison), and Peter Carini (TAC liaison), developed new documentation:
  - [Guidance for council resignations and non-participation](#)

- ○ Council-specific Administrative Information areas (TAC and UAC), both of which include:
    - ■ Roles of the chair and vice chair for both councils
    - ■ Annual timeline of reports and workflows
    - ■ Suggestions for running council meetings

Technical Advisory
- ● Trevor Thornton became TAC Vice Chair in September and had an onboarding call with current Chair (Maggie Hughes).
- ● The Technical Advisory Council met on September 17, October 15, and November 19.
    - ○ September's meeting focused on the new sub-team assignments and working groups, and reviewing the sub-teams' next steps. Additionally, the group reviewed the previous year's retrospective and brainstormed discussion topics for upcoming all-TAC meetings.
    - ○ Each meeting, one sub-team will have a time slot to discuss a topic of their choice: in October, Integrations discussed internal sub-team documentation and in November, Tech Docs discussed ways to solicit and collect feedback from the ASpace user community.
    - ○ Discussions were productive, knowledge-sharing conversations that provided insight for all sub-teams.
- ● Julia McGuiness stepped down from TAC due to changing work circumstances and limited availability. Megan Firestone cited similar work circumstances and asked to take a break from TAC this fall. We will check in with Megan in December.

Users Advisory
In addition to the Joint TAC/UAC Meeting in August, the Users Advisory Council met once in October. Chair Ashley Knox is going on leave and stepped down from her position; vice chair Lydia Tang assumed the chair role in October. Brittany Newberry volunteered and was accepted as new vice chair for the UAC. Ongoing and future plans for the UAC include:
- ● Discussing the results of the Development Prioritization survey and strategize how the council and subteams can help ArchivesSpace respond to requested areas of change.
- ● Continuing to collaborate with TAC leadership to expand and clarify roles, procedures, and documentation of Council leadership.
- ● Exploring greater clarity of wiki organization.
- ● Exploring whether meeting monthly instead of bimonthly may be beneficial for accomplishing council-wide work and discussion.

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Sub-team Reports

Development Prioritization (Cross-council)

- **Charge:** Dev. Pri. is a cross-council subteam that prioritizes feature requests and bug reports for developers working on future releases of the ArchivesSpace program
- **Roster changes:** William Modrow and Julia McInnes cycled off of the subteam. Daniel Michelson and Lori Dedeyan (from UAC), and Randy Kuehn (TAC) joined the roster.
- **Major activities:** In late October, Dev. Pri. co-leaders Maggie Hughes and Lydia Tang shared a survey to solicit member feedback about development priorities. Over 120 individuals submitted responses. Dev. Pri. met three times in this reporting cycle and addressed nearly 50 tickets.
- **Future priorities:** The survey results will be synthesized into a blog post in January or February and the feedback will be shared to both Councils and all subteams.

User Documentation (UAC)

- **Charge:** To create and maintain an array of ArchivesSpace User Documentation in the ArchivesSpace Help Center that provides instruction to users at member organizations.
- **Roster changes:** John Zarrillo, Sue Luftschein, Brittany Newberry, and Kate Blalack have cycled off of the Documentation Sub-Team roster. Sarit Hand, William Modrow, and Angela White joined the team. Kevin Clair stepped down as leader of the sub-team, and Jasmine Jones took over in his stead.
- **Major activities:** Updated and maintained the ArchivesSpace Documentation page to reflect changes and additions to the software; created screencasts and video tutorials to help users navigate various features; provided users with resources that help them migrate from AT and Archon.
- **Future priorities:**
  - Establish review and publication processes for ArchivesSpace User Manual in Confluence.
  - Standardize the process for updating the User Manual with each new release. Conduct a wholesale review and update of content in the User Manual, including incorporating feedback from Documentation Writer's Survey.
  - Develop documentation for users about how to use the new User Manual and Help Center.
  - Assess feasibility and benefits/challenges of establishing a UAC Documentation project in JIRA to manage sub-team assignments and updates to the User Manual.

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[Integrations](#) (TAC)
- **Charge:** support the ArchivesSpace community by taking a transparent approach to documenting the integration of systems with the ArchivesSpace application.
- **Roster changes:** The Integrations sub-team has seen a change in leadership and membership with the new TAC term. Dallas Pillen took over sub-team leadership responsibilities, and new TAC members James Griffin III, Sarit Hand, Randy Kuehn, and Valerie Addonizio joined Dallas and returning member Edgar Garcia on the sub-team.
- **Major activities**
  - Developed a [work plan for the year](#) and began forming three sub-groups, each will focus on one of the three categories:
    - Building upon last year's improvements to the [community-focused Integrations pages](#) on the ArchivesSpace wiki.
    - Improving internal sub-team communication, documentation, and project management.
    - Reviewing and communicating the results of the ArchivesSpace Integrations Survey that the sub-team sent out in summer 2019.
  - As noted above, the Integrations sub-team led the first TAC sub-team discussion during the October 15 TAC meeting on the subject of internal sub-team documentation.
- **Future priorities**
  - Sub-groups to start concurrent work in each of the three goal areas.

[Metadata Standards](#) (TAC)
- **Charge:** support the ArchivesSpace community by taking a transparent and proactive approach to documenting the metadata standards used by the ArchivesSpace application and monitoring the standards landscape.
- **Roster changes**: As a new sub-team, all members are new. Kevin Sclottmann is the sub-team leader and is joined by Jared Campbell, James Griffin III, Daniel Michelson (UAC), Bria Lynn Parker, Dallas Pillen, and Gregory Wiedeman.
- **Major activities**
  - The newly formed Metadata Standards subteam had a wide-ranging and productive first call in September, which resulted in a [work plan](#) for the year.
  - The group decided that MARC, EAD2002, and DACS were Tier 1 standards, and to strive for optimal support of those standards. It therefore chose to focus this year on updating the published import and export mappings for MARC and EAD2002, and making future updates easier to perform. Work is underway on this task.

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- **Future priorities**
  - The subteam will review the tooltips for DACS compliance and monitor Jira tickets for metadata-related issues.
  - As a new subteam, it will seek other ways to solicit comments and provide feedback on the relationship between ArchivesSpace and established and emerging external metadata standards.

Technical Documentation (TAC)
- **Charge:** to maintain and enhance all ArchivesSpace technical documentation.
- **Roster changes:** Alicia Detelich is staying on as sub-team leader and is joined by returning members Dave Mayo and Trevor Thornton as well as new member Kevin Clair (UAC).
- **Major activities**
  - The group met twice, on October 14 and November 14 and finalized a work plan for 2019-2020.
  - Trevor submitted a pull request for a new 'API' directory in the tech-docs repo which will contain future additions of generalized API documentation.
  - Set preliminary goals/timelines for completing work plan tasks, especially focused on "fill[ing] in documentation gaps in key areas."
- **Future priorities**
  - Will meet in December to review progress on goals.
  - Before next meeting all members will review existing developer screencasts, review existing development-focuses documentation, and consider potential new ways of reaching out to users to get feedback and ideas for documentation enhancements.
  - Members will begin submitting issues to tech-docs repo to establish a preliminary queue for planned documentation enhancements.

Testing (Cross-council)
- **Charge:** This is a cross-council subteam that includes members of the ArchivesSpace User Advisory and Technical Advisory Councils. The Testing subteam tests features and bug fixes prior to new releases of ArchivesSpace.
- **Roster changes:** Added one member from Technical Advisory council: Greg Wiedeman
- **Major activities:** Tested the new language feature for the recent release. Tested functionalities of ASpace for v2.7.0 and tested 16 Jira issues in September.
- **Future priorities:** Test functionalities and features for next release when requested by program team.

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Usability (UAC)

- **Charge:** To develop functional and practical recommendations to the program that streamline navigation, clarify the visual layout, identify accessibility improvements, and enhance the ease of use of the existing program for both the staff and public interface of the ArchivesSpace software application.
- **Roster changes:** This is a new subteam with the current roster of all UAC members Lydia Tang (leader), Kate Blalack, Lori Dedeyan, Terra Gullings, Brittany Newberry, Julia Novakovic, Althea Topek
- **Major activities:** Met twice in October and November and has addressed eleven tickets. Tickets recommended for passing will go through Dev. Pri. for final approval.
- **Future priorities:** Work on wireframes for tickets needing additional documentation; and queue up tickets for community voting, with the intent of sharing a surveymonkey "ballot" on a quarterly basis for tickets that would need large community support.

Ad Hoc Working Group Reports
API Ad Hoc Working Group (TAC)

- **Charge:** to improve the coverage and quality of the API documentation. As an Ad Hoc Working Group, TAC Membership is not a requirement for participation.
- **Roster changes:** The working group was formed in September. Group leader Dave Mayo convened the group, which now includes three other TAC members: Valerie Addonizio, Alicia Detelich, and Kevin Schlottmann, as well as five people from the wider ASpace community: Maura Carbone (Yale University), Rachel Donahue (USDA), Bobbi Fox (N/A), David W. Hodges (Columbia University), and Eric Hanson (MIT).
- **Major activities:**
  - Added several new members who are not members of TAC.
  - Populated a spreadsheet with all routes in the system as of group formation (routes going forward shouldn't be an issue, as they're being generally documented as created).
  - Met once over Zoom to establish communication channels and set up further meetings.
  - Completed two trainings over Zoom (recorded here) on how to add documentation, build it locally, and make pull requests to add it to ArchivesSpace.
- **Future priorities:**
  - Begin divvying up routes, prioritizing them, and distributing the work of documenting them to members over the next month or two.

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