ArchivesSpace Joint Quarterly Report: December - February 2020

Technical Advisory Council and User Advisory Council

Maggie Hughes and Lydia Tang

March 2, 2020

Executive Summary

- Continued collaboration and communication between the TAC and UAC Councils as evidenced from the February joint council meeting.
- Continued updating and creation of documentation by Council leadership within their respective admin wikis and nomination process.
- User Documentation, with the assistance of Jessica Crouch, initiated the new Help Center in December 2019.
- Development Prioritization published the results of their community survey in January 2020. 109 institutions participated. Respondents expressed the most interest in ArchivesSpace's configurability and customization; searchability; and data manipulation (batch, round tripping, etc.).

Council Reports

Joint Council updates

Council Chairs Lydia Tang and Maggie Hughes assisted the Nominating Committee in revising and updating the Call for Nominations and accompanying workflow. This year, nominations will be received via Google Form and the call's language has been updated to include each Council's current sub-teams, priorities, and skill sets.

The User Advisory and Technical Advisory Councils held a joint meeting on February 7 and addressed:

1. Mid-year check in on sub-teams' progress. This included asking the subteams to look at their work plans and comment on progress: have they accomplished what they thought? Encountered any roadblocks? Do work plan scopes need to be readjusted?
2. Discuss wiki and documentation for Councils and sub-teams and strategies for improving documentation. Sub-teams have ownership over their wiki space and should feel comfortable with adding and updating to include anything of enduring use or value to your sub-team and documenting conclusions.

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3. Gather feedback on integrated sub-teams. Council members gave positive feedback on the first year of integrating TAC and UAC sub-teams and didn't note any major pain points. This a topic that Council leadership plans to continue to discuss and evaluate moving forward.

Technical Advisory

The Technical Advisory Council met on December 17. Continuing with our sub-team led discussions, in December Metadata Standards asked for feedback on their work plan and asked more generally if others felt they were covering ASpace's needs well and whether other things should be on their radar. The sub-team led discussions were productive, knowledge-sharing conversations that provided insight for all sub-teams.

With the start of the new year TAC reached the midpoint for this term and changed from meeting monthly to bimonthly. This continues a practice from previous TAC terms of holding monthly TAC meetings at the beginning of the term and then transitioning to bimonthly meetings as the focus shifts more to individual sub-team meetings. Our next all-TAC meeting will be in April and led by Vice Chair Trevor Thornton. Maggie added Onboarding new TAC members to the TAC Administrative Info section created last quarter.

Maggie Hughes communicated with TAC members who will be eligible to renew their appointments to TAC this summer and determined the number of vacancies. TAC will lose three current members for reasons of either increasing or changing work responsibilities. Megan Firestone, who took a step back from TAC last fall, elected not to re-join for the remainder of this term as well as next term. Other TAC members who are stepping down are Edgar Garcia and Greg Wiedeman. TAC thanks Edgar, Megan, and Greg for being wonderful colleagues and their hard work. All told, TAC will have five openings next term -- 2 open and 3 non-renewing.

Users Advisory

In December, Adrienne Storey and William Modrow resigned from the UAC and we welcomed new members Johanna Carll (Harvard University) and Krista Oldham (Clemson University). The User Advisory Council met on December 13 and is continuing to critically evaluate its function and practices. Meeting every other month can be challenging to maintain communication and focus, so we will be exploring meeting more frequently in order to more fully pursue the Council's mission and activities. Lydia Tang added further administrative documentation, including an Onboarding new UAC members and email templates.

Lydia Tang verified the number of UAC members who will be eligible to renew their appointments and determined the number of vacancies. Three current UAC members will not renew their appointment due to either increasing or changing work responsibilities. Julia

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Novakovic, Kevin Clair, and Terra Gullings will be stepping down at the end of their first term and we thank them for their contributions on the UAC. The UAC will have a total of 7 openings for this appointment season (1 vacant position, 3 ineligible for renewal, 3 not renewing).

Sub-team Reports
Development Prioritization (Cross-council)
- **Charge:** to prioritize feature requests and bug reports for developers working on future releases of the ArchivesSpace program
- **Roster changes:** While not participating as a "member" of Dev. Pri., we are grateful and will miss the insight and support of departing Lead Developer, Laney McGlohan, and wish her the best on her future endeavors!
- **Major activities:** Lydia Tang published a summary of the Dev. Pri. survey results in January and also a Leader Guidance document. We have been exploring alternative approaches to assign tickets, having Edgar Garcia volunteer thus far to assign tickets. Dev. Pri. met three times since the last quarterly report and addressed 102 tickets.
- **Future priorities:** We plan to continue to cultivate leadership succession with Dev. Pri. by encouraging members to volunteer to assign tickets on a rotational basis. We're planning to place special emphasis on addressing tickets which align with articulated community interest from the Dev. Pri. survey.

Integrations (TAC)
- **Charge:** to support the ArchivesSpace community by taking a transparent approach to documenting the integration of systems with the ArchivesSpace application.
- **Roster changes:** Edgar Garcia left the group in December 2019 due to elevated responsibilities within other community groups, including the Development Prioritization sub-team.
- **Major activities**: The Integrations sub-team has made progress on the three major components of its 2019-2020 work plan, which includes improving the community-focused Integrations pages on the ArchivesSpace wiki, improving internal sub-team documentation, and reviewing the results of an ArchivesSpace Integrations survey conducted by the sub-team. This work is being completed by three sub-groups within

the Integrations sub-team. The community-focused Integrations pages sub-group has started to review pages to update the information about existing integrations, has discussed layout/presentation changes, and has drafted questions to ask of the ArchivesSpace community and the product leads for other applications to begin gathering additional information to include on the Integrations pages. The internal sub-team documentation group has started to work on an internal document that includes a calendar of yearly sub-team activities (inspired by the TAC yearly timeline), compiles a list of sub-team resources managed outside of the wiki space, and keeps track of names and contact information of previous sub-team leaders. Finally, the survey review group has aggregated survey responses and started compiling the data into a report to be shared with the ArchivesSpace community.

- **Future priorities:** The three sub-groups will continue to make progress on various aspects of the sub-team's work plan. In particular, the community-focused Integrations page group will gather information from the community and application product leads to update the existing Integrations pages, the internal sub-team documentation group will finalize the yearly calendar and list of sub-team managed resources, and the survey review group will finish compiling a report and communicate the results of the survey to the ArchivesSpace community.

Metadata Standards (TAC)
- **Charge:** to 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:** None.
- **Major activities:** The metadata standards subgroup has been focused on updating the published import and export mappings for MARC and EAD2002. Progress is deliberately slow as we try to create a sustainable and documented process and appropriate tools for doing so. We are now exploring the possibility of reviewing only a selected set of commonly-used fields, which would significantly reduce the complexity of the process. In addition, we are also monitoring Jira tickets for metadata-related issues and commenting as needed.
- **Future priorities:** The group's future priorities include ensuring that future updates to the import/export mappings are easier to perform, review the tooltips for DACS compliance, and seeking other ways to solicit comments and provide feedback on the

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relationship between ArchivesSpace and established and emerging external metadata standards.

Technical Documentation (TAC)
- **Charge:** to maintain and enhance all ArchivesSpace technical documentation, in conjunction with the ArchivesSpace development team.
- **Roster changes:** None.
- **Major activities:** During this quarter the subteam met 2 times - in January and February. Subteam members reviewed existing developer screencasts and discussed how to potentially convert some of their content to written documentation, or at least to link to the screencasts directly from the tech-docs repository. Members also began creating directory stubs and issues which serve as placeholders for future documentation enhancements. At our most recent meeting we met with Laney McGlohan to discuss integrating some parts of some of the developer onboarding documentation she has been working on with the tech-docs repository. We also met with Jessica Crouch to begin planning for an open call and survey to collect information from users regarding documentation needs.
- **Future priorities:** Our future priorities are to bring to completion the various activities we are currently working on. In particular we will continue to add content to the tech-docs Github repository based on the stubs and issues we have created. We will also prioritize scheduling an open call in about 6-8 weeks, per Jessica's suggestion. After the open call we will begin work on the survey - our hope is that the open call will help inform the survey questions we develop.

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:** Joshua Shaw is now co-lead of the sub-team
- **Major activities:** Tested 19 Jira issues in December/January for next release.
- **Future priorities:** Test functionalities and features for next release and associated Jira issues 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:** Adrienne Storey resigned from the UAC and Usability subteam in December due to increased job duties.
- **Major activities:** We have started to meet every two weeks in order to maintain momentum and focus. We've worked on 7 tickets needing additional Usability investigation - we met with reporters for two of the tickets to continue to suss out and refine ticket requests. We've also pursued topical projects, such as the usability and visual appearance of accessing the ArchivesSpace public and staff interfaces using a mobile device. Christine di Bella recently set up "swim lanes" in JIRA to ensure that Usability and Dev. Pri. don't overlap when addressing tickets, which seems helpful.
- **Future priorities:** We'll continue to refine our workflows and address usability projects for ArchivesSpace.

[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:** Johanna Carll and Krista Oldham joined.
- **Major activities:**
  - Developed new documentation for ARKs and the Languages Sub-Record
  - In the midst of developing process for reviewing and implementing documentation revision requests and a user manual style guide
  - Implemented section assignments (primaries and secondaries) for sub-team members
- **Future priorities:**
  - Complete user manual style guide
  - Begin implementation of style guide on existing documentation
  - Complete documentation of user manual review process
  - Complete workflow for documentation update process with new releases

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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:** Rachel Donahue joined in October.
- **Major activities:** The API Ad-Hoc working group has done a substantial amount of planning and coordination. We set up a spreadsheet and defined a workflow for collecting and tracking documentation updates. We then conducted trainings on how to override the automatic API documentation, how to build the API docs, and how to submit changes as pull requests to ArchivesSpace. Additionally, several routes have been claimed and documentation is being written for them, and a fault in the auto-docs was discovered and a pull request fixing it has been submitted and will be included in the next release.
- **Future priorities:** Our priorities at this point are to document additional routes and make improvements to the automatic documentation generator as we discover issues.

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