



ArchivesSpace Joint Quarterly Report: March - May 2020

Technical Advisory Council and User Advisory Council

Maggie Hughes and Lydia Tang

May 11, 2020

Executive Summary

- COVID-19 has impacted every member of TAC and UAC and the regular operations of Councils and sub-teams.
- Improved data management with a new joint Council Google drive to store internal working documents by the Councils and sub-teams.
- Planning for new UAC User Engagement sub-team underway.
- All sub-teams and Councils are focusing on ensuring smooth leadership transitions in the coming months.

Council Reports

Joint Council updates

The TAC/UAC Coordinating Committee met on [March 23](#) to primarily discuss the need for a shared document workspace and storage solution for TAC and UAC sub-teams, as well as any adjustments needed to TAC and UAC groups due to COVID-19.

Maggie Hughes and Lydia Tang have asked both Councils and all sub-teams to make adjustments in their schedules and work plans to accommodate the unusual circumstances of the COVID-19 pandemic and the exceptional and varied stresses that it may be causing for individuals. It should be noted that we expect that the amount of work that sub-teams will accomplish during these months will be lower than under “normal” circumstances.

Council sub-team members had previously expressed a need for the storage of document types that Confluence does not support (such as spreadsheets) for their ongoing work. In response, the Coordinating Committee decided to move forward with a Google Drive account for TAC and UAC. Christine DiBella set up the drive and Lydia and Maggie have been rolling out access to TAC and UAC members. Confluence will continue to be the system of record for materials like rosters, meeting minutes, reports, and policy/process documents, but Google Drive can be used for internal working documents of value for a limited time, documents that are not appropriate for public viewing, and documents that require functionality not available in Confluence.



Technical Advisory

The Technical Advisory Council held a meeting on [April 21](#) (TAC is meeting bimonthly for the second half of the term, as in the past) which was led and facilitated by Vice Chair Trevor Thornton. Completing our sub-team led discussions, the API ad hoc working group gave an update on their work and priorities. During this meeting, Trevor also announced a call for Vice Chair volunteers and will work towards filling the position, ideally by the start of the new term in July.

The final meeting of the year, in June, will be a 2019-2020 TAC Retrospective focused on what we did well and what we should have done better. In anticipation for the TAC Retrospective, all TAC sub-teams will begin conducting their own retrospectives in May and June.

Maggie Hughes added “When to use Confluence vs. Google drive?” documentation to TAC’s [Responsibilities and Expectations](#).

Users Advisory

The Users Advisory Council met once, according to the bi-monthly schedule customary to this council, on March 23. UAC vice chair spearheaded a planning committee consisting of Ashley Knox, Lydia Tang, and Community Engagement Coordinator Jessica Crouch and they created a new wiki space, charge, and supporting documentation for the new User Engagement sub-team to start in the new term. The final meeting of the year will be on May 11.

Lydia Tang added “When to use Confluence vs. Google drive?” documentation to UAC’s [Responsibilities and Expectations](#).

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:** None.
- **Major activities:** Dev. Pri. met three times, on March 25, April 29, and May 27. During this time, we addressed 66 tickets.
- **Future priorities:** Continue to prioritize tickets with New and Awaiting More Information statuses that correspond with the community’s top priorities from our 2019 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:** None.
- **Major activities:** The Integrations sub-team has been finalizing work 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. Members of the sub-team have created a working draft of updated community-focused integration pages, with key updates including improving the layout of the pages and adding or updating information about existing integrations. Sub-team members have also compiled a calendar of yearly sub-team activities and gathered information about sub-team resources that are managed outside of the TAC wiki space (e.g., Google Drive). Finally, members of the sub-team have created a draft report based on the integrations survey, summarizing the results for the top ten most desired systems integrations and compiling information about general needs that the community has regarding integrations with ArchivesSpace. The sub-team is currently reviewing the drafts of all of the previously mentioned outputs to finalize by the end of this term.
- **Future priorities:** The Integrations sub-team will be focused on finalizing and publishing the updated community-focused integrations pages and the Integrations with ArchivesSpace survey report. The sub-team will also be planning to move as much of its internal documentation as possible to the new TAC Google Drive space. Finally, the sub-team will be preparing its 2019-2020 retrospective to wrap up the current term.

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:** We substantially completed review of MARC importer mappings, and are preparing tickets for identified problems and discussing how to publish these updates. We also continued to comment on JIRA tickets where appropriate.
- **Future priorities:** For the remainder of the term, we plan to publish the updated MARC importer mappings, review the EAD 2002 import process, and document our review process. We deprioritized the export mapping review, and plan to leave that work to next year's group.

Technical Documentation (TAC)

- **Charge:** to maintain and enhance all ArchivesSpace technical documentation, in conjunction with the ArchivesSpace development team.
- **Roster changes:** None.
- **Major activities:** The committee met in April. During this time, they made a few minor changes to tech-docs directory structure, created a backend_docs branch to store fleshed-out backend docs, started creating some database documentation, added code base documentation from Laney's developer onboarding notes, and made a few updates to MySQL provisioning docs.
- **Future priorities:** Wrap up in-process work for the term and complete a sub-team retrospective.

Testing (Cross-council)

- **Charge:** to test features and bug fixes prior to new releases of ArchivesSpace.
- **Roster changes:** None.
- **Major activities:** Tested 14 JIRA issues in April related to bug fixes and enhanced functionality.
- **Future priorities:** Test functionalities and features for next release and associated Jira issues when requested by the program team.

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:** Ashley Knox returned from leave to join this sub-team



- **Major activities:** The sub-team met four times, according to its biweekly schedule. During these meetings, they addressed Jira tickets which had a label of “Usability” as a “pre-vetting” to Dev. Pri. and currently are preparing a report of recommendations about the “Collection Organization” tab of the public user interface.
- **Future priorities:** Future plans include possibly participating in a June webinar about PUI customizations and preparing a tool to vote on the evolving PUI this summer.

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:** None.
- **Major activities:** Sub-team is finalizing the revision review process for documentation. Members from the sub-team are currently working on a user documentation style guide. Updates (minor revisions and clarifications) to the user manual are being made on a continual basis.
- **Future priorities:** Identifying next chair/co-chairs for UAC Documentation Sub-Team and leadership transition. Finalizing and implementing documentation style guide across user manual. Developing work plan for 2020-2021.

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:** Corey Schmidt joined in April.
- **Major activities:** Several additional 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. Additionally, a “general information” section has been started for describing general properties of the API (right now, description of pagination and the resolve parameter).
- **Future priorities:** Our priorities at this point are to document additional routes and make improvements to the automatic documentation generator as we discover issues.

