ArchivesSpace Joint Quarterly Report: May - July 2021

Technical Advisory Council and User Advisory Council

Randy Kuehn and Dan Michelson

August 23, 2021

Executive Summary

- Continued close collaboration between TAC and UAC leadership
- Planned leadership training
- Completed the orientation wiki and provided orientation for new members based on it
- Completed annual retrospectives
- Member match program launched

Council Reports

Joint Council updates

TAC and UAC leadership continued the emphasis on joint activities by holding an orientation for new members of both Councils on July 21.

Monthly meetings of the TAC/UAC Coordinating Committee continued, with topics including following up on ideas generated at the February 2021 leadership meeting, a retrospective, and planning for the new term.

Technical Advisory

Roster changes (July 1):
- Departures:
  - Maggie Hughes
  - Dallas Pillen
  - Trevor Thornton (Chair)
- Arrivals:
  - Tom Steele
  - Elizabeth Dunham
  - Austin Munsell
  - Jenna Silver-Baustian
- New Roles
  - Randy Kuehn (Chair)
  - Valerie Addonizio (Vice-Chair)

TAC met on June 17 (major discussion topic: Retrospectives).

User Advisory

Roster changes (July 1):
- Departures:
    - Lori Dedeyan
    - Ashley Knox
    - Brittany Newberry (Chair)
    - Krista Oldham
- Arrivals:
    - Kellen Carpenter
    - Patrick Milhoan
    - Sarah Ponichtera
    - Suzanne Reller
- New Roles
    - Dan Michelson (Chair)
    - Regina Carra (Vice-Chair)

UAC meetings were held on May 19 (major discussion topic: Draft Orientation Wiki), June 23 (major discussion topic: Retrospectives), and July 30 (major discussion topics: Kickoff and leadership training).

Most work outside of sub-teams was focused on the transition to the new term and the completion of the orientation wiki.

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:** Angela White (UAC) is lead and Saron Tran (TAC) is vice-lead. Tom Steele (TAC) has joined the sub-team and Maggie Hughes (TAC) has rotated off.
- **Major activities:** Dev Pri discussed 14 tickets on May 4, 2021 and 15 tickets on June 1, 2021.
- **Future priorities:** Dev Pri will continue to meet on a monthly basis to review and prioritize bug reports and feature requests.

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:** New Roster includes: Sarit Hand, Elizabeth Dunham, Andrew Morrison, James Griffin (Vice Lead), Kate Blalack, (Lead)
- **Major activities**: kick-off meeting on August 16, 2021, reviewing proposed future projects
- **Future priorities:** possibility of creating an integration "getting started" instructions/web manual and continue creating a page in the Integrations wiki space to track integrations that the community is interested in that do not yet exist

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:** The group did not add any new members this term. The current roster is Valerie Addonizio (chair), Elizabeth Roke (past chair), Jared Campbell, James Griffin, Kevin Schlottmann
- **Major activities:** The team completed a revision of the MARC to AS mappings and published the revised spreadsheet to the website. We also developed the yearly retrospective.
- **Future priorities:** We will be developing a set of priorities for the year at our first meeting, but we plan to continue the mapping revision work for EAD import as well as resolving Jira tickets related to metadata. We are also interested in developing approaches and workflows to provide more consistent input on Jira tickets related to metadata standards.

Technical Documentation (TAC)
- **Charge:** to maintain and enhance all ArchivesSpace technical documentation, in conjunction with the ArchivesSpace development team.
- **Roster changes:** Alicia Detelich and Dave Mayo are co-leads and Rachel Searcy is vice lead. Austin Munsell and Jenna Silver have joined the sub-team and Trevor Thornton has rotated off.
- **Major activities:** Worked with Lyrasis developers to begin implementation of Jekyll to build Tech Docs site from source files in Github repo, providing easier maintenance and improved user experience. Began identifying areas of insufficient documentation and creating placeholders/stubs for them in the documentation Github repository.

- **Future priorities:** Complete implementation of Jekyll for technical documentation site. Solicit contributions to technical documentation from the ArchivesSpace community, prioritizing areas where placeholders have already been created. Take on administrative responsibilities for the API Documentation Ad Hoc Working Group, which will work in cooperation with the ArchivesSpace development team to improve API endpoint documentation.

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:** Rachel Searcy (TAC) is the new Testing subteam vice-lead, Suzanne Reller (UAC) joined.
- **Major activities:** The Testing subteam tested or is currently watching 32 JIRA issues. The team also reviewed this year's retrospective and the updates to the team description.
- **Future priorities:** The Testing subteam will continue to perform regression testing for major releases as well as test any JIRA issues that are flagged for testing.

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:** Joanne Archer is the new Usability team lead. Lori Dedeyan and Brittany Newberry rotated off the subteam. Kellen Carpenter joined the subteam.
- **Major activities:** finished collection organization view report based on survey results, created comprehensive jira ticket as a result of report; participated in 2021 User Forum to provide overview of team and get feedback on tickets and issues, reviewed tickets and provided feedback, solicited feedback on tickets from the community via listserv
- **Future priorities:** continue to seek ways to improve community feedback on usability issues, continue communication with AS developers, ensure work of team is aligned with technical roadmap, find ways to improve workflows and routing of tickets.

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:** Krista Oldham rotated off the team; Johanna Carll will continue as lead, Margaret Kidd is the new vice-lead
- **Major activities:** completed review and updating of the Accessioning section of the User Manual, began review and updating of the Resource section of the User Manual, created spreadsheet to administer ongoing systematic review and updating of all sections of the User Manual, created section on User Doc wiki to record issues to be addressed in the future by the team
- **Future priorities:** Section by section review and updating of the User Manual

Member Engagement (UAC)

- **Charge:** This sub-team provides outreach and community support to the ArchivesSpace member community.
- **Roster changes:** Brittany Newberry and Ashley Knox rotated off of the sub-team; Regina Carra is the new sub-team Lead and Bailey Hoffner is the new Vice Lead; Kate Blalack and Jessica Crouch continue as members; Patrick Milhoan and Sarah Ponichtera both joined as members.
- **Major activities:** Launched the Member Match program for the initial 2021 cohort; notified matches and held first Member Match Virtual Mixer at the 2021 Annual Member Forum; completed 2020-2021 Retrospective
- **Future priorities:** Continue planning activities and outreach to Member Match participants; document Member Match outcomes

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:**
- **Major activities:** Implementation has been slow and very few updates were made. An agreement was made with the ArchivesSpace development team to implement documentation updates suggested by Working Group members
- **Future priorities:** Administration of this Working Group will fall under the purview of the Technical Documentation sub-team.