ArchivesSpace Joint Quarterly Report: May through July 2022

Technical Advisory Council and User Advisory Council

Valerie Addonizio and Regina Carra

July 18, 2022

Executive Summary

- TAC and UAC reflected on the 2021-2022 term and set the ground-work for the new term.

Council Reports

Joint Council updates

- Created 2022-2023 term rosters for subteams. Finalized subteam leadership for new term
- Began substantial improvements to the wiki space to expand Orientation materials into a broader Handbook
- Continuing to improve the Yearly Timeline page to align activities and members
- Oriented new members with welcome emails and Orientation meeting held on July 15

Technical Advisory

- Last meeting of term held on 2022-06-16
- Identified key areas of improvement for next term, particularly on supporting subteam leaders with an additional orientation, an optional meeting group, improvements to agenda pages, and open office hours

User Advisory

- Council members reflected on the Council's work in the past term (notes for Council retrospective discussion can be found recorded in the May meeting notes). Overall, the retrospective affirmed the good work the Council is already doing, particularly in orienting and training new members and maintaining cohesive leadership with the Lead/Vice-Lead model. Lots of discussion about how to encourage more cross-team participation that could be explored next term.
- Last meeting of the term held on 2022-06-28 where subteams presented retrospectives and incoming Chair, Regina Carra, updated continuing members on new member orientation activities
- No meeting to be held in July; Council meetings will resume in early August

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:** On July 1, Matthew Strauss (TAC) and Keli Schmid (UAC) joined, replacing Saron Tran (TAC) and Angela White (UAC). Additionally, Dan Michelson (UAC) became lead and Matthew Neely (UAC) became vice-lead.
- **Major activities:**
  - Reviewed 36 tickets
  - Completed retrospective and initial planning
- **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:** Austin Munsell requested to join Integrations for next term. Sarit Hand will be taking on leadership for next term with Elizabeth Dunham as Vice Lead. Paige Monlux will be joining as a new member.
- **Major activities**: Focused on making public facing Integration pages more visible, streamlining the table structure to make updating easier and information easier to read. Normalized information on pages so it is consistent throughout. Created an annual survey for collecting up-to-date information about new and ongoing integrations, to be opened this Fall, 2022. Completed the 2021-2022 Integrations Retrospective
- **Future priorities:** Evaluate survey, strength and weaknesses of questions, adjust as needed. Identify outlets for conducting surveys. Updating public pages with new information from future surveys. Annualize activities for surveying users and developers in the future and maintaining the Integration pages.

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:** Jared Campell has rotated off at the end of his term; Valerie Addonizio is departing to become TAC Chair. Kate Bowers and Kevin Clair will be joining as new members.
- **Major activities:** Published an updated version of the MARC importer mappings; Brainstormed substantial ideas for next term; Completed the [2021-2022 Metadata Retrospective](#) with major accomplishments listed at the top.
- **Future priorities:** EAD2002 importer mappings; piloting ex officio participation in other subteams; advocating for an ad hoc group to update the ArchivesSpace data model

[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 rotated off at the end of their terms; Elizabeth Caringola will be joining as a new member. Rachel Searcy will become Lead.
- **Major activities:** Completed the [2021-2022 Tech Docs Retrospective](#)
- **Future priorities:** Solicit contributions to technical documentation from the ArchivesSpace community, prioritizing Solr and areas where placeholders have already been created; Clarify role of Tech Docs with regards to API Working Group and collaboration on endpoint documentation with developers.

[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:** Elizabeth Roke (TAC) and Margaret Turman Kidd (UAC) have resigned from Testing for the next term. Ceylon Woods (TAC), Elizabeth Caringola (TAC), Paige Monlux (TAC), and Alexis Peregoy (UAC) will be joining as new members.
- **Major activities:** Completed the [2021-2022 Testing Retrospective](#)
- **Future priorities:** Continue to provide timely testing in preparation for upcoming releases of ArchivesSpace.

[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:** As of July 1, Chris Tanguay has joined the team

- **Major activities:** Finalize staff and public interface PDF review, create retrospective and plan for upcoming term
- **Future priorities:** Prioritize work according to the ArchivesSpace road map and develop survey for digital object community feedback

[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:** As of July 1, Liz Beckman rotated off the team and Eden Orelove joined as our newest member.
- **Major activities:** Finishing updates to the Digital Object pages. The final review will carry over into the next quarter. Reported out accomplishments in the 2021-2022 retrospectives.
- **Future priorities:** Continue systematic review of help center pages, updating as needed. Create and update documentation in response to new version releases or user feedback. Restructuring page watching assignments to be compatible with membership fluctuations and develop an onboarding workflow and documentation for new members.

[Member Engagement](#) (UAC)
- **Charge:** This sub-team provides outreach and community support to the ArchivesSpace member community.
- **Roster changes:**
  - Bailey Hoffner - Lead
  - Patrick Milhoan - Vice Lead
  - Mary Pedraza joins sub-team
  - Regina Carra has stepped down
- **Major activities:** Held the final Member Match event (Coffee Chat) on June 2nd; Finalized matches for 2022-2023; Completed retrospective; Distributed final Member Match survey link; Launched Member Match 2022-2023; Jessica is moving forward with the "Making the Case for ArchivesSpace" infographic
- **Future priorities:** Plan and promote initial Member Match Mixer event for late summer/early fall; Complete work plan for 2022-2023; 2021-2022 final survey response review; Plan monthly discussion topics and quarterly events for Member Match; Discuss scope of Member Engagement work beyond Member Match Program