

ArchivesSpace Joint Quarterly Report: August-October 2023

Technical Advisory Council and User Advisory Council

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Executive Summary

During the first quarter of the term, Council leadership and sub-teams focused on on-boarding, orientation (or re-orientation), generating ideas for sub-team and collaborative work, and identifying concrete term actions in their workplans. There continues to be a focus on collaboration and continuity this term, demonstrated by resuming projects from previous years and concerted efforts to codify undocumented practices. The Councils are very grateful to Christine Di Bella for arranging for Council members to attend a GitHub workshop offered by Lyrasis for free in October. This workshop is a continuation of previous efforts to offer technical professional development opportunities to Council members.

Council Reports

Joint Council updates

- [Joint TAC/UAC meeting](#) held on September 27, 2023. Sub-teams shared their work plans and discussed ideas for collaboration.
- Council Mixer held in September to start the new term. The event gathered members on Zoom for an informal chat.
- Council Chairs and Vice Chairs held a meeting in mid October to review work plans; we recommend making this a standard Council leadership activity each term. The group identified a number of common themes across sub-teams, including community engagement and increased visibility, distribution of workload amongst sub-team members, and a continued focus on continuity and maintenance. Development Prioritization also seemed to be connected to many of the other sub-teams, whether through specific workflows or as part of community engagement strategies. The Chairs and Vice Chairs are discussing how to incorporate these common themes and areas of overlap into upcoming Council meetings and activities.
- Council Chairs and Vice Chairs are asking sub-teams to regard their workplans as living documents that will be updated or modified throughout the term.

Technical Advisory

- Monthly meetings resumed in [August](#). Meetings consist of a program update, Council updates, and sub-team reports. The August meeting orientated new members and

re-oriented returning members by previewing the year ahead and discussing expectations for service and engagement. TAC is also experimenting with other meeting formats to increase engagement.

- A portion of the [October meeting](#) was dedicated to breakout rooms for individual sub-teams to meet. Council members frequently mention that it is challenging to find time for their sub-team work, citing competing priorities with work and their personal lives. Giving meeting time back to the sub-teams is an experiment to provide space for logistics, discussion, or active work. This was received positively and we will continue to consider how best to structure meeting time going forward.
- Technical Advisory Council members agreed to cancel the December meeting on account of holiday scheduling.
- One sub-team (Technical Documentation) is in need of identifying a Vice Lead.

User Advisory

- UAC resumed regular meetings in [August](#). In addition to Council updates, and subteam and program reports, the August meeting focused on orientation of new members and planning for the term. For the [October](#) meeting, the Testing subteam demonstrated testing a Jira ticket. The Development Prioritization subteam will lead the discussion at the November meeting.
- Subteam leadership met with the Chair in September and discussed challenges and opportunities for improvement. The group decided that they would meet bimonthly to increase opportunities for communication between the subteams and council leadership.
- An ongoing issue for UAC subteams has been determining Vice Leads for the term, but the goal is to have Vice Leads in place for all the subteam by December.

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:** Reviewed 25 Jira tickets. Developed 2023-2024 workplan. Sought community feedback on Jira ticket relating to duplication of Resource records. This was undertaken as part of our aim to undertake increased outreach work this term.
- **Future priorities:** Continue to review Jira tickets and take forward ideas to increase outreach work and increase engagement with the ArchivesSpace community.

[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 sub-team has been proceeding with the work plan to sunset the Integrations subteam. Work has included updating data about system integrations from Confluence to the Awesome ArchivesSpace Github and updating the Integrations sub-team's Confluence pages.
- **Future priorities:** Clean up the sub-team's Google documents. Resources allowing, the sub-team will identify priorities and develop a work plan for the ad hoc Awesome ArchivesSpace Ad Hoc Working Group to convene on a biannual basis.

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:** No changes.
- **Major activities:** Diane Biunno has volunteered to serve as Vice Lead for 2023/24. Kevin Clair (Lead) will be working with her on shared responsibilities for the group in the near future. Work is underway to complete the sub-team evaluation of the existing EAD and MARC21 import/export behavior, and to establish a regular review process for future sub-teams.
- **Future priorities:** Work on a documentation strategy for Metadata Standards work; establish parameters for regular sub-team work related to standards review; prepare programming for the Online Forum in the spring.

Technical Documentation (TAC)

- **Charge:** To maintain and enhance all ArchivesSpace technical documentation, in conjunction with the ArchivesSpace development team.
- **Roster changes:** No changes
- **Major activities:** The sub-team has been working on establishing various audit schedules to identify any areas needing routine review/updates. The team has also established a pull request schedule to divide monitoring months between members. There have been three pull requests that have been reviewed and merged.
- **Future priorities:** Discuss the types of skills that would be ideal for Tech Docs. Review the relationship, expectations, and workflows between Tech docs and ArchivesSpace developers. Continue to seek out ways to collaborate with other sub-teams.

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:** No changes
- **Major activities:** Testing onboarded new team members with two introductory sessions focused on the Jira testing process. Following onboarding, the team completed testing for 12 Jira tickets. Michelle Paquette agreed to serve as vice-lead for Testing.
- **Future priorities:** Continue to conduct Jira ticket testing and other projects as assigned 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:** None
- **Major activities:** During this period, the subteam worked to develop a community survey on multilingual description functionality, which is to be distributed in November. The subteam also continued its review of restriction recording functionality and submitted a ticket on Jira.
- **Future priorities:** The subteam will continue working with program staff on distributing the community survey and analyzing the results, and to form a wider project team to assist with developing use cases and a draft specification for multilingual description. The subteam will also continue its work on restriction recording.

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:** During this period, User Documentation onboarded two new members; updated page watching assignments to reflect current membership; selected a new section of the User Manual (Subjects module) to review and update; continued work on an effort from last term to identify all fields that publish in the PUI; addressed documentation feedback associated with Jira tickets, comments on User Manual pages, and feedback submitted directly to ArchivesSpace staff.

- **Future priorities:** Continue to work on goals outlined in workplan for this term including review of the Subject module, continuation of fields that publish in the PUI work, new tickets tagging UD, and collaboration with other sub-teams including Testing and Technical Documentation.

Member Engagement (UAC)

- **Charge:** This sub-team provides outreach and community support to the ArchivesSpace member community.
- **Roster changes:** None.
- **Major activities:** Planned and executed our first member match quarterly mixer in late October. Discussed making changes to informal engagement opportunities. Discussed ArchivesSpace Code of Conduct task force.
- **Future priorities:** Plan and execute quarterly mixers in early December, March, and May. Nominate vice-lead. Begin work with the Code of Conduct task force.