



ArchivesSpace Joint Quarterly Report: May-July 2023

Technical Advisory Council and User Advisory Council

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Executive Summary

- TAC and UAC reflected on the 2022-2023 term and began activities for the beginning of the 2023-2024 term.

Council Reports

Joint Council updates

- TAC and UAC Chairs and Vice Chairs served on the Nominating Committee. The addition of the Vice Chairs to the Committee improved efficiency of end of term work and resulted in greater continuity and clarity for beginning of term activities in July.
- Completed annual sub-team retrospectives. TAC and UAC conducted Council retrospectives.
- Created 2023-2024 term rosters for subteams. Finalized subteam leadership for new term.
- Oriented new members with welcome emails and an orientation meeting held on July 18. The session was recorded and sent to all new members.

Technical Advisory

- Last meeting of term held on [2022-06-13](#). No meeting held in July, with regular Council activities and meetings to resume in August.
- The following members completed their terms of service, with many thanks: Valerie Addonizio (rotated off as Chair), Sarit Hand, Randy Kuehn, and Kevin Schlottman. TAC welcomed six new members to the Council in July.
- Council members reflected on TAC work in the past term. Overall the discussion affirmed the good work the Council is doing, particularly around the explicit themes of continuity and collaboration.
- Major accomplishments during this term include:
 - First-year members expressed satisfaction with the on-boarding and communication processes at the beginning of their terms.



- Clarification of Council and sub-team sizes, resulting in an increase in Council size for the 2023-2024 term. While small teams were easy to organize and schedule, it made delegation difficult and strained individuals' capacity.
- Professional development opportunities for Council members that focused on specific technical skills were appreciated, although many attendees of the Lyrasis GitHub webinar desired greater depth and detail.
- Challenges during this term include:
 - Many members expressed the need for improved time management and workload strategies within their subteams. As a volunteer group, members frequently found it challenging to find time to engage with and complete Council work on top of their jobs and personal lives. This will be an area of focus for the 2023-2024 term in identifying ways to support both subteam leaders and individual contributors.

User Advisory

- The User Advisory Council met in [June](#) to discuss the previous term and retrospectives for UAC and for each subteam. UAC did not meet in July and will resume regular meetings in August.
- UAC added nine new members who started their terms in July. Regina Carra rotated off as Chair of UAC and the following members completed their service on council: Johanna Carll and Dan Michelson.
- Major Accomplishments of the last term:
 - A focus on collaboration this term allowed sub-teams to find new avenues for collaboration that did not exist before the term. For example, the User Documentation subteam met with TAC's Technical Documentation subteam to discuss possible areas where they could work together and Member Engagement partnered with Development Prioritization on a presentation for member match program participants.
 - UAC Leadership focused on finding the right size for council and subteams and determined that UAC should be between 18-23 members. As a result, council size has increased for this next term to 19 members.
- Challenges of the last term:
 - Throughout the last term, six UAC members resigned their appointments. The latest resignation occurred in June. Resignations were for various personal and professional reasons, the most common being that the member transitioned to a new opportunity at an organization that was not an ArchivesSpace member organization. Where there was not a change in workplace, bandwidth to continue Council work was also cited. As a result, it was difficult to sustain workload with fewer members.
 - Some subteams had a difficult time finding avenues for collaboration between the teams given the differences in workflows.



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:** Dan Michaelson (2022-2023 Lead) and Randy Kuehn cycled off in July following the completion of their terms. Mattie Clear, Alexander Duryee, Bonnie Gordon, Brianna McLaughlin, Cory Nimer and Dillon Thomas joined in July 2023. Matthew Neely assumed the Lead role and Matt Strauss the Vice-Lead role in July 2023.
- **Major activities:** Reviewed 22 tickets.
- **Future priorities:** Dev Pri will continue to meet on a monthly basis to review and prioritize bug reports and feature requests. Consider outreach activities to support the ArchivesSpace community in creation of well-formed bug and feature tickets in Jira. Continue to work with Metadata Standards and Usability.

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:** Sarit Hand cycled off. Elizabeth Dunham assumed the Lead role and Paige Monlux the Vice-Lead. No new members were added.
- **Major activities:** Completed our plan to sunset the Integrations team and move operations previously governed by Integrations to the Awesome ArchivesSpace GitHub.
- **Future priorities:** Obtain access to Awesome ArchivesSpace and migrate information from the current Integrations website to GitHub.

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:** Kevin Schlottman cycled off in July; Jacqueline Asaro and Diane Biunno cycled on. Kevin Clair is in the process of assuming sub-team leadership responsibilities from Regine Heberlein.
- **Major activities:** Made substantial progress on support for standards in ArchivesSpace functionality, including MARC21 error reporting and EAD 2002 import. Engaged the ArchivesSpace community on desired support for EAC-CPF for managing Agents and for possible development cycles toward extending the Subjects module.



- **Future priorities:** Continuing to support existing standards in ArchivesSpace as appropriate, including following standards updates and advising DevPri on ticket prioritization as it relates to metadata standards. Following development around current and emerging standards, such as RiC.

Technical Documentation (TAC)

- **Charge:** to maintain and enhance all ArchivesSpace technical documentation, in conjunction with the ArchivesSpace development team.
- **Roster changes:** Rachel Searcy cycled off of sub-team at end of June to assume TAC Chair; Jenna Silver assumed Lead role in July; new members Bonnie Gordon, Alexander Duryee, and Michelle Paquette joined subteam in July.
- **Major activities:** continued GitHub repository maintenance (merged 3 pull requests, closed 1 issue); [completed retrospective](#) and brainstormed ideas for subteam's work next term; appraised TechDocs folder in Google Drive.
- **Future priorities:** continue GitHub repository maintenance, continue documenting processes, monitor and respond to questions on listservs, potential comprehensive improvement of TechDocs with ArchivesSpace developers (not confirmed but included in [2023 development roadmap](#)).

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:** Cory Nimer and Sarit Hand cycled off. Suzanne Reller and Rachel Searcy are staying on as alternates, but will not actively test unless called on and available. New members are Diane Biunno, Brianna McLaughlin, Michelle Paquette, Ashley Williams, Jacqueline Devereaux, and Ryan Lee. Total membership for 2023/24 is 10 active members and 2 alternates.
- **Major activities:** No major testing activities since the last report. New members have been added to the Google drive and pointed to testing resources.
- **Future priorities:** Continue to conduct Jira ticket testing and other projects as assigned by the program team. Select a vice lead to serve as lead in 2024/25.

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:** For the new term, Susannah Broyles was added to the team; the remaining members of the team are unchanged.
- **Major activities:** Since the last report, the team completed a community survey on desired bulk import functionality and submitted the findings to the program team for review. The team also reviewed tickets related to restriction reporting in the application and submitted comments in Jira.
- **Future priorities:** Continue review of tickets marked as needing additional information in Jira, with a focus on those related to usability issues. The team will coordinate its work with Development Prioritization and program staff.

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 cycled off; Rebecca Bagnon assumed sub-team lead role in July; new members Kelly Francis and Matthew Gorham joined the sub-team in July.
- **Major activities:** Completed documentation pertaining to Make Representative and expand/collapse functionality in 3.4.0 release. Continued work to create a comprehensive list of fields that publish in the PUI.
- **Future priorities:** Identify sub-team vice-lead for new term. Orient new members on activities and processes undertaken by the sub-team. Identify a new section of the user manual to review. Continue work on a comprehensive list of fields that publish in the PUI. Continue writing documentation as needed for new ArchivesSpace releases. Continue collaboration with the Technical Documentation sub-team.

Member Engagement (UAC)

- **Charge:** This sub-team provides outreach and community support to the ArchivesSpace member community.
- **Roster changes:** Mary Pedraza was made sub-team lead upon the resignation of the lead and vice lead in April. Two new members are Jaime Margalotti and Will Clements. Regina Carra rejoined the team.
- **Major activities:** 2022-2023 Member Match Program ended. 2023-2024 matches made in May and announced. Program began with the announcement of matches.
- **Future priorities:** Plan and implement a set calendar for the member match program. Expand listserv discussions and develop other informal engagement activities for participants. Plan quarterly event for the fall.

