ArchivesSpace Joint Quarterly Report: February - April 2024

Technical Advisory Council and User Advisory Council

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Executive Summary

Councils returned to higher levels of activity this spring after a quiet winter, continuing a trend observed in past years. Sub-teams continue to make progress on their workplans, which include goals and projects to improve the application and support the broader ArchivesSpace community. Multiple Council members contributed to March's Online Forum through presentations and membership on the Planning Team, further solidifying this pattern into a norm. Council leadership have also begun the transition to next year's term, about which more will appear in next quarter's report.

Council Reports

Joint Council updates

- TAC and UAC held their second joint meeting of the term in February, during which sub-teams shared mid-term progress reports on their workplans. The remainder of the meeting was devoted to a discussion on engagement with the ArchivesSpace community. We are grateful for Jessica Crouch, who generously explained her role, empowered sub-teams to identify the forms of engagement relevant to their work, and situated community engagement as a form of accountability.
- Chairs and Vice Chairs of TAC and UAC are serving on this year's Nominating Committee. Council leadership has asked for individual Council members to identify colleagues and others in their professional networks who might be suitable candidates.
- Chairs and Vice Chairs of TAC and UAC have assessed attrition rates for the Councils of the next few years to identify the ideal number of new members.
- Chairs of TAC and UAC participated in the Virtual Forum's session on ArchivesSpace Governance.. Multiple Council members presented at the Forum; one member served on the Forum planning team.
- Chairs of UAC and TAC participated in the Core Values Workshop organized by the Code of Conduct Review Task Force.

Technical Advisory

- TAC experienced two resignations during this period: Liz Caringola (Testing, Technical Documentation) and Paige Monlux (Integrations, Testing) both resigned after accepting new jobs at institutions that do not use ArchivesSpace. We are extremely thankful for their service. These resignations will be taken into account as part of the nominations process for the coming term.
- Developers Don Smith and Brian Zelip joined the March TAC meeting so that Council members could learn more about their perspectives on the application and the ArchivesSpace community. Brian, Don, and Thimios shared how they approach bug reports and feature requests in Jira, along with their impressions of the application codebase. We are very grateful for their time, and found their observations interesting and helpful.
- Vice Chair Austin Munsell successfully led the April TAC meeting to help prepare him for his role as next year's Chair. In addition to the standard updates, this meeting featured a presentation by Thimios on potential ideas for Jira ticket enhancement and the possibilities for end-to-end testing.
- TAC Chair and Vice Chair, Christine, Thimios, and Jenna Silver of Technical Documentation have had conversations about the need to restructure the Technical Documentation to both better reflect the reality of who is creating technical documentation and to provide clarity on the responsibilities of the TAC members of this sub-team. We hope to clarify these adjustments by the end of the term in order to set up next year's sub-team members for success.

User Advisory
- UAC canceled its March meeting as it was scheduled on the same day as the ArchivesSpace Virtual Forum. This allowed UAC members to participate in the forum.
- Cory Nimer and Susannah Broyles of the Usability sub-team presented the work of the Multilingual Description Task Force at the ArchivesSpace Virtual Forum.
- Both the Usability and Member Engagement sub-teams discussed their activities at the April UAC meeting. The Usability sub-team provided an overview of the work of the Multilingual Description Task Force and asked for feedback on use cases. The Member Engagement sub-team provided an overview of the Member Match program.
- Two members of the Member Engagement sub-team continue to serve on the Code of Conduct Review Task Force.
- UAC had one resignation this quarter.

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

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- **Major activities:**
    - Reviewed 28 Jira tickets during the period.
    - Supported work undertaken by the ArchivesSpace Lead Developer to produce Community guidance and support for the creation of Jira tickets for feature requests and bug reports.
    - Started compiling a list of Jira tickets to seek Community feedback as part of efforts to increase engagement and outreach work.
- **Future priorities:** For the remainder of 2023-2024 the main priority will be to support the ArchivesSpace Lead Developer's work to produce Community guidance and resources on using Jira for feature requests and bug reports.

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:** Paige Monlux left the committee and the Technical Advisory Council, as she accepted a new position and is no longer working with ArchivesSpace. Elizabeth Dunham is now the sole individual on the roster.
- **Major activities**: Completed a full evaluation of Integrations' legacy Google Drive content and created a spreadsheet recommending disposition (deletion or migration to Confluence). Liz Caringola and Bonnie Gordon generously volunteered to review this spreadsheet, for which I am very grateful and thank them for their help. Final disposition measures were implemented and the Integrations Google Drive decommissioned. The disposition decision spreadsheet was added to Confluence as well.
- **Future priorities:** Review plan for decommissioning Integrations and ensure that all measures have been completed prior to the end of the 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:** Created community survey on metadata standards, use cases, and integrations.
- **Future priorities:** Circulate survey among the ArchivesSpace community.

Technical Documentation (TAC)

- **Charge:** to maintain and enhance all ArchivesSpace technical documentation, in conjunction with the ArchivesSpace development team.

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- **Roster changes:** Elizabeth Caringola has resigned
- **Major activities:** Discussing/exploring restructuring of TAC.
- **Future priorities:** Restructuring TAC

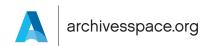## [Testing](#) (Cross-council)
- **Charge:** This is a cross-council subteam that includes members of the ArchivesSpace User Advisory and Technical Advisory Councils. The Testing subteam tests features and bug fixes prior to new releases of ArchivesSpace.
- **Roster changes:** Elizabeth Caringola (TAC) and Paige Monlux (TAC) resigned.
- **Major activities:** Completed full regression testing for 3.5.0 in February. Currently discussing development of behavior scenarios with the ArchivesSpace program team for future end to end testing suite.
- **Future priorities:** Prepare for full suite regression testing/behavior scenario drafting in conjunction with upgrades to Bootstrap, Rails, jQuery, and other essential ArchivesSpace components mid to late May.

[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:** Continued focus on multilingual description functionality planning in association with Jira issue ANW-957. Developed related use cases with the assistance of a volunteer task force, which were presented to the community during the Virtual Member Forum. The use cases were made available for comment until the end of April.
- **Future priorities:**

[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:** Created and/or updated documentation pertaining to four tickets as part of version release 3.5.0, notably including new documentation regarding resetting passwords; completed

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spreadsheet of fields that publish a the Resource record of the PUI and determined a plan and methodology for converting this information into new documentation in Confluence.

- **Future priorities:** Completing conversion of Resource record spreadsheet to documentation; closing out remaining end of term tasks for the sub-team.

Member Engagement (UAC)

- **Charge:** This sub-team provides outreach and community support to the ArchivesSpace member community.
- **Roster changes:**
    - Will Clements resigned from UAC in February due to increased responsibilities in his job.
- **Major activities:**
    - Instituted an informal event on the first Friday of each month, held three events (Feb-Apr).
    - Planned a quarterly mixer for March but had to cancel due to low registration; rescheduled the event for May.
    - Created and opened 2024-2025 Member Match applications.
    - Updated Member Engagement/Member Match documentation on the Confluence site to match current procedures.
    - Code of Conduct Review Task Force welcomed a community volunteer to help with the review; hired the Center for Scientific Collaboration and Community Engagement to lead our review and activities.
- **Future priorities:**
    - Close 2024-2025 Member Match applications and create matches.
    - Create and send out End of Year email and possible survey.
    - Host the first Friday event in May and June.
    - Create sub-team retrospective.
    - Begin planning for the first events of the 2024-2025 Member Match program.
    - Elect a new vice-lead, if possible.