
Minutes

Title: Online User Advisory Panel

Date of Meeting: 14th November 2007, 13:00-16:00

Location: The National Archives (TNA), Kew – Conference Room A

Attendees: TNA:
Jeff James - Head of Advice and Records Knowledge (JJ) (Chair)
James Lawson - Customer Intelligence Manager (JL) (Secretary)
Mercedes Clark-Smith - Head of Web Team (MCS)
Olivia Dickinson - Web Team Operations Manager (OD)
Dan Jones - Head of Business Development (DJ)
Ruth Selman - Head of Knowledge Transfer (RS)

Matthew Woollard - UK Data Archive (MW)
Else Churchill - Society of Genealogists (EC)
Barbara Harvey - Guild of One-Name Studies (BH)
Geoff Riggs - Federation of Family History Societies (GR)
Kathryn Thompson - British Association for Local History (KMT)
Paul Blake - Regular Readers (PB)
Sue Donnelly - Public Archive Sector (SD)
Adrian Towers - Government Records Management Community (AT)

Apologies: TNA:
Emma Allen - Documents Online Manager
Gemma Richardson - Strategic Development Manager
Jennifer Rigby - Head of IT Strategy

Ian Wakelin - Private archive sector (IW)
Richard Ambrose - eBay (RA)
Gaynor Burns - BBC (GB)

Action

1 Minutes and Matters Arising

- 1.1 *Item 1.1 – JS to investigate if there is a link on the catalogue showing where items are when not in Kew.*
JJ reported that Jone Garmendia (Senior Archivist, Catalogue Manager) had been consulted regarding this query, and had supplied the following response:
Yes, this information appears in relevant catalogue entries, from the quick reference screen. Firstly we need to look at the information on place of deposit, shown under the field 'Held by'. Under 'held by' you can see TNA, Victoria and Albert Museum, Kew Gardens library &

Archive and so on. Under held by you can also see 'creating government department or its successor'. This is for material which is retained in the OGD. Bear in mind that records held by somebody else don't have a 'Request this' button.

The field labeled 'Availability' also displays related information. It concatenates data from access conditions, closure status, and restrictions on use. Here the user may see '3 working days notice to produce' which means that the records are stored off site (DeepStore).

- 1.2 *Item 1.2: Panel members to contact TOL or GC if interested in more information regarding the trial period of institutional charging for DocsOnline.*

EC reported that she had encountered issues with multiple downloads, although on the whole she felt that the trial had been successful. She asked if it would be possible to extend the trial. DJ reported that the issue of multiple downloading had been investigated, and appeared to be caused by users clicking several times, rather than any technical fault.

DJ indicated that he was happy for the trial period to be extended, however he emphasised that no decision had yet been made regarding offering institutional charging as a full-blown service. PB asked how widespread it was envisioned any full service would be. DJ responded that if it went ahead it would be offered commercially and open to any institution, assuming that the minimum IT and support requirements were met.

- 1.3 *Item 3.1: SD said that she might be able to suggest some academic groups to contribute to Your Archives.*

RS apologised that she had not been in contact with SD, but reported that there is now a full time manager for Your Archives in place: Guy Grannum, who can be contacted on YourArchives@nationalarchives.gov.uk

Post meeting note: Guy has now been in contact with SD regarding academic groups.

- 1.4 *Item 8.1: GR said that initially the Board looked at the 1901 census project and queried as to why they were not looking at the 1911 census project.*

DJ responded that he had no direct experience of the 1901 census, but could comment on the 1911 project. He reported that there would be a number of issues involved, particularly in terms of commercial confidentiality, in letting external users view the census prior to its release (he also noted that he was aware of issues with the 1901 Census project in this respect).

DJ also noted that external users had been consulted during the earlier planning stages of the project, and that the issues they had raised had

been taken seriously during the bidding process. He added that at the point of contract, there was a very specific model agreed upon for the project, and that this would be difficult to deviate from at later stages. EC raised concerns that the provider has a limited access model for its existing content. DJ responded that this would not necessarily be the model used for the 1911 Census, adding that he is confident that they will provide an excellent service.

It was asked if the necessary infrastructure is in place for the heavy demand expected during the first few days after release (which is known to have caused issues with the 1901 census). DJ responded that TNA was confident the infrastructure will be robust. Extensive load and stress testing is being designed and will be satisfactorily completed prior to any decision to launch. DJ also explained it is not likely to be viable to provide the necessary infrastructure to cope with providing immediate access to everyone who attempts to look at the census during this period however. He added that it is now commonly accepted that instances of such high and short term demand on websites is dealt with by using offline message servers (limiting access to manageable demand and asking additional users to wait) and ensuring that once access is granted, the customer is able to complete their transaction successfully. Clear communication and management of expectations is a paramount consideration.

DJ reported that he was pleased with the progress on the 1911 Censes, with scanning and transcription both underway. He also reported that there would be a Microsite launched at the end of November, allowing users to register for updates. DJ also reported that the 1911 Census services would be tailored to suit the needs of specific groups, but that this would take place after the main launch of the site.

2 Changes in management at TNA - JJ

- 2.1 JJ reported that there have been a number of changes to management at TNA: Tom O'Leary had left TNA and moved to a new post in the education department of Parliament. James Strachan (Director of Public Services and Marketing) has temporarily moved on to a special project as secretary to the review of the 30-year rule. Jeff James (Head of Advice and Records Knowledge) and Dan Jones (Head of Business Development) are currently overseeing the day-to-day responsibilities (*Marketing / Education / Product Development* and *Public Services* respectively) of James Strachan's Role. Jeff James has taken over responsibility for chairing the Online User Advisor Panel.

3 Update on digitisation - DJ

- 3.1 DJ presented an update on current digitisation projects, which fall into 3 main categories: Licensed Internet Associateships (LIAs), Academic and Internal (primarily DocumentsOnline). Please see the separate document for a breakdown of the current projects discussed.
- 3.2 It was asked if it would be possible to record a greater level of detail

when indexing the records in WO96 and WO97, so as to benefit historians interested in gaining statistical information (such as medical historians interested in physical information on soldiers). DJ responded that there are plans to possibly expand the model outside of genealogy, noting that it is necessary to balance the level of detail made available, with commercial viability.

4 Online Strategy update - MCS

- 4.1 MCS reported that work on the online strategy document was nearing completion, having been delayed to an extent by the Transformational Government strategy.
- 4.2 The next stage would be to begin work on redesigning The National Archives' family of websites, involving a programme of user research and consultation, looking into how users are currently using the sites. It was asked whether the Online Strategy is working hand in hand with the web archiving project. MCS replied that this remained a separate project.

5 General update on TNA website - OD

- 5.1 OD reported that the TNA mobile site had been live since August and had received 2 and a half thousand visits to date (with an average of 4 pages viewed per visit).
- 5.2 OD also reported that social bookmarking of the site (on social sites such as Facebook etc... had been available since 16th October. She noted that bookmarking is not allowed on payment pages of the site for security reasons.
- 5.3 OD reported that the podcasts that had been made available on the site had been proving popular.
- 5.4 She also informed the group that updates on Kew 2008 (the programme of improvements to TNA's Kew site) would be posted on the site weekly on a Monday for the remainder of the works.

6 Update on Your Archives - RS

- 6.1 RS reported that there had been a quarter of a million visits since April and that the number of contributions had continued to rise (to over 1000 - not including the memoranda added by TNA staff).
- 6.2 A particularly interesting development had been that users had started, voluntarily, to add transcriptions of First World War diaries to the site. It was agreed that this was a positive development, and in line with the intended purpose of the site; to open up records to others and enable users to share the information they found.
- 6.3 RS introduced an idea for a potential project for Your Archives; to add

the Census Street Indexes to the site, and encourage contributors to use this as a structure to add information on streets / addresses etc.. as they found it in the course of their research, resulting in a useful and continuously expanding resource. It was agreed that this would be a very useful and important project and that it was fully endorsed by the group (one member of the group commented that the project had the potential to 're-define community and local history').

- 6.4 RS thanked the group for their endorsement, which would help strengthen the business case to TNA's Executive Team for extra resources for the project.

7 External member presentation – Geoff Pick

- 7.1 See separate document.

- 7.2 Sue Donnelly volunteered to give the presentation at the next meeting

8 Future of Online User Advisory Panel

- 8.1 JJ introduced the item by explaining that there was a perception internally that a juncture had been reached in terms of user consultation, (with the relaunch of the TNA Users Forum and the relocation of the FRC) and that this was felt to be an opportunity to sound out the members of the Online User Advisory Panel and discuss the future / function of the panel going forward. JJ added that there is potentially overlap between the existing user groups, that there is a perception that the OUAP is not fulfilling its original remit, and that there is potential for TNA staff and resources to be spread thin.

- 8.2 It was felt by members of that group that although there is evidently a challenge in maintaining delineation between the different groups, there is and should continue to be a distinction between the OUAP and the TNA User Forum – namely that the OUAP represents organisations while the User Forum is directed at end users.

- 8.3 It was agreed that to a certain extent, the group did not currently fulfil its original purpose. Several members of the group expressed the opinion that there was a tendency for TNA management to use the meetings as an opportunity to inform users of developments rather than truly consult them, and that projects should be brought to the panel at an earlier stage than they generally are (the Your Archives street indexing project was cited as an example of where the panel was consulted at an appropriate time). JJ noted that there are occasions when it is not possible to consult fully, giving the example of LIA projects where there is the element of confidentiality to consider.

- 8.4 Moving forward, it was agreed that:
- a) The group should continue to exist in its current format (more or less).

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- b) Where possible early consultation / notification was preferable, and the use of email in-between on site meetings should be increased.
 - c) The format of the meetings should maintain a split between 'information' and consultation, with the addition of a more open 'brainstorming' session at 1 meeting per year.
 - d) The group generally has a good blend of members but could potentially broaden / increase its membership (it was suggested that more academic representation may be beneficial).
 - e) The group should have more of a voice / impact on TNA's future plans and a greater opportunity to offer their expertise and to lobby TNA on behalf of the groups they represent.

9 Any other business

9.1 JJ reminded the group of forthcoming closure dates at Kew:

1st – 16th December

21st – 26th Jan

9 Next Meeting

9.1 Date: 17 March 2008

Time: 13:00 – 16:00

Location: The National Archives, Kew – Conference Room B