

User Advisory Group Minutes

Title: User Advisory Group
Date of Meeting: 06/09/2011
Time of Meeting: 11.30 to 14:00
Location: The National Archives Kew, Blue Room

Attendees:

Staff

Chris Mumby (CM - Chair) - Head of Commercial Delivery
Melanie Hide (MH) - Head of Media and Internal Communications
Emma Bayne (EB) - Head of Systems Development
Alison Webster (AW) - Head of Strategic Projects
Edward Hampshire (EH) - Principle Records Specialist, Diplomatic & Colonial
Jill Rees (JR) - Senior Project Manager
Sarah Leggett (SL) - Marketing Manager
James Lawson (JL) - Customer Intelligence Manager
Jone Garmendia (JG) - Head of Cataloguing
Jane Langford (JLa) - Senior Archivist, Access
Patrick Mallett (PM - Minutes)
Sabera Chowdhury (SC) - User Experience Designer

Delegates

Prof. Anne Laurence (AL) - Academic
Prof. Grace Ioppolo (GI) - Academic
Dr. Paul Dryburgh (PD) - County / External archives
Dr. Julie Anderson (JA) - Diversity / Inclusion
Patrick Vernon (PV) - Diversity / Inclusion
Roger Lewry (RL) - Family History Societies
Else Churchill (EC) - Family History Societies
Dr. Nick Barrett (NB) - Independent Researchers
Bob O'Hara (BO'H) - Independent Researchers
Dr. Nicola Phillips (NP) - Map Room Users
Susan Moore (SM) - Map Room Users
Gillian Stevens (GS) - Onsite personal interest
Graham Woolgar (GW) - Onsite personal interest
Ian Ireland (II) - Online Users

Apologies:

Staff

Jeff James (JJ) - Director of Operations and Services

Delegates

All delegates were present

Item		Action
1.	<p>Minutes and Matters arising</p> <p>1.1 The minutes of 22nd June 2011 were read and agreed, there were no action points.</p>	
2.	<p>Introduction</p> <p>2.1 CM welcomed everyone and noted that the User Advisory Group had been involved in a number of additional sessions, focusing on specifics of TNA's service since the previous meeting. He asked for feedback on this additional involvement.</p> <p>2.2 Delegates were generally happy to be involved in additional focused feedback opportunities, but asked that, where possible, such sessions could be arranged to happen on the same day (so as to reduce travel expenses). It was also requested that when such activities take place between meetings, the activity and its outcome is recorded at the next meeting. CM to consider.</p>	CM
3.	<p>Update and Future plans for the Discovery service</p> <p>3.1 EB gave an outline of the current Discovery service and planned improvements, explaining that the old catalogue was built a number of years ago and that the old technology will not enable the organisation to meet our strategic priorities going forward.</p> <p>Delegates raised a number of issues and questions:</p> <p>3.2 I would like the number of results per page to default to the highest number rather than the lowest.</p> <p>(EB) Unfortunately users vary a lot on this issue. Some users find a lot of information per page daunting. However, it may be possible to make this customisable / enable the settings to be saved once set.</p> <p>3.3 Can Access to Archives (A2A) be searched from Discovery and if so can it be turned off?</p> <p>(EB) This is not possible currently but will be. It is aimed that users will be able to specify which 'record type' is searched in a particular search (e.g. documents held by TNA, documents held elsewhere, documents that are accessible online etc...). So yes, it is planned that it will be possible to 'turn off' results from A2A, or on the other hand, to search exclusively within A2A.</p>	

3.4	<p>When 'AND' is used in a search 'OR' results are also returned?</p> <p>EB to investigate issue. Currently the search results are prioritised so that 'AND' results are returned first, followed by 'NEAR' results, followed by 'OR' results. However, this could be changed so that only 'AND' results are returned.</p>	EB
3.5	<p>When the service goes live, will feedback still be clearly requested and will a list of enhancements be published?</p> <p>(EB) Feedback will continue to be sought. We will continue to regularly publish a list of enhancements when there is a new release, as well as a list of those enhancements currently being worked on for the next release.</p>	
3.6	<p>When I search on a known term (e.g. 'Fee farm rents'), the system asks "did you mean 'Fee farm rents' rather than Fee, farm, rents"</p> <p>EB to investigate issue</p>	EB
3.7	<p>Can the UAG be given an opportunity to review / test the service shortly before it goes fully live?</p> <p>(EB) Yes. It is expected that the catalogue will be replaced by Discovery at the end of this financial year. We will only take the current catalogue down when we are confident that Discovery is functioning satisfactorily. Other functionality (such as the A2A interface) will continue to be developed after this.</p>	
3.8	<p>What is the possibility of Discovery crashing if too popular? Are you conducting load tests?</p> <p>(EB)The system will be fully load tested before going live. We are also gradually increasing the load by increasing traffic to the system and testing how it copes. For example, we will be promoting Discovery through the e-newsletter while it is still in Beta. Discovery is built in a way that makes it much more scalable than the current catalogue, so we will be able to respond to increases in load more quickly and easily than with current systems.</p>	
3.9	<p>Will data regarding the performance of the system be published?</p> <p>CM stated he would look into the possibility of publishing performance data, and take this away as an action. He noted that it is important that any metrics that we publish are meaningful to our users.</p>	CM
3.10	<p>Will there be a change in the way that the records in DocumentsOnline are delivered?</p>	

	<p>(EB) The DocumentsOnline interface will be completely redesigned and integrated with the Discovery service. It will be possible to download images in a number of formats.</p>	
3.11	<p>Will there be structured, or guided searching built in to the Discovery system?</p>	
	<p>(EB) Yes. We will be working with the Knowledge Transfer team to look at how research guidance and other additional guidance, such as book recommendations, can be integrated in to the Discovery service in a way that works intuitively with users information seeking behaviours.</p>	
3.12	<p>Will the equivalent service to DocumentsOnline be available via a subscription to academic and other institutions and how will the pricing structure work?</p>	
	<p>(CM) Yes, there will be a subscription for institutions to access, via Discovery, documents digitised in house by TNA. However, unlike the current subscription for DocumentsOnline, it is planned that the cost will vary based on volume of usage. No decisions have been made regarding costs, but we will start to look at this soon.</p>	
3.13	<p>Will it be possible to see a history of your own searches?</p> <p>(EB) Yes, there will be a personalised area, enabling users to sign in and access searches that they have saved and other useful information such as book lists and images. It is expected that there will be access to basic personal profiles by the end of this financial year.</p>	
3.14	<p>It has been noted that there are a number of issues currently with the browse facility in Discovery. Browsing has always been an issue with the old online catalogue as well; there are some cases where the experience of browsing physically on site can not be matched online.</p> <p>(EB) We agree, and browsing is one of the key areas of the user experience that we plan to address going forward. We are already looking into this issue but it seems that a separate session with User Advisory Group members focused on obtaining feedback around browsing would be beneficial.</p> <p>It was agreed that a separate session on browsing should be arranged.</p>	<p>JL</p>
3.15	<p>Descriptions in the old paper catalogues are sometimes better than online, can online versions be improved?</p> <p>(EB) The initial stages of the Discovery project will not be directly addressing issues to do with the quality of the catalogue</p>	

<p>3.16</p>	<p>information itself; we are working with the existing electronic catalogue data and looking at ways to improve how that data is searched, presented and accessed. However, it is aimed that later stages of the project will include the addition of user contribution functionality, which will enable users to tag records and to add to and improve existing catalogue descriptions.</p> <p>It is not clear on the Discovery site that the feedback given is read and responded to.</p> <p>(EB) Thank you for this. All of the feedback given on the site itself and elsewhere is considered and often directly informs our development work. However, we may need to look at ways of making this more apparent to users.</p>	
<p>4.</p> <p>4.1</p> <p>4.2</p> <p>4.3</p> <p>4.4</p>	<p>Pilot Home Guard digitisation update</p> <p>AW gave an update on the project, including a revised list of fields for transcription. This was informed by feedback received from members of the UAG, following the separate session at which delegates viewed a sample of the Home Guard records.</p> <p>Delegates raised a number of issues and questions:</p> <p>Will commercial companies be happy with the fields chosen?</p> <p>(CM) We believe we can ask for this amount of information to be transcribed. Naturally the proposition needs to remain commercially attractive, so a balance needs to be struck between making the records findable for users, and encouraging them to pay for access to them. Therefore in the final product (delivered by a Licensed Partner) it is likely that some of these search fields will sit behind a 'pay wall', so that users will only be able to see the data once they have paid. For the pilot, delivered via Discovery, payment will be simpler and users will pay only at the stage of downloading an image of a document.</p> <p>Will this be used as a model for future projects?</p> <p>(CM) All of the series of records that we digitise are unique, so we have to consider them on a case by case basis. However, as always, we will naturally learn lessons from this project that can be applied in the future.</p> <p>Will the issue of foreign names be addressed? For example there is a discrepancy between former name and surname in some far eastern names, so it is necessary to be able to search for either.</p> <p>(AW / CM) Foreign names are unlikely to be a major issue with this particular collection. However, we will take these concerns on board. The user experience is a key consideration in any</p>	

<p>4.5</p>	<p>digitisation project and it is in the interests of both TNA and any partner we work with to ensure a good user experience.</p> <p>Concerns were raised regarding the cost to academic users. It was noted that in many cases the charging models for digitised material are not suited to academic usage, which often involves exhaustive studies (e.g. of a whole County) as opposed to individual searching.</p> <p>(CM) For the pilot, any institutions with an institutional license to the DocsOnline service will be able to access the Home Guard records as part of that license. Both the pilot and the final product will be available for free on site at TNA but users accessing them from home would have to pay. Making fully searchable digitised records available over the internet for free is beyond TNA's statutory responsibility; however the charges are regulated by Treasury to ensure they do not exceed the cost of providing the service. As noted earlier, we will be looking to provide an institutional subscription model for documents digitised by TNA that is more robust and representative of usage than the current DocumentsOnline institutional subscription. With regard to Licensed Partners providing a subscription that allows unlimited download, this is partly up to the individual partner.</p>	<p>CM / AW</p>
<p>4.6</p>	<p>The issue of whether or not a particular service is technically able to deliver the results on the scale required also needs to be considered when providing a service for users who wish to conduct exhaustive studies. Even if there is an unlimited subscription available, it is sometimes not technically possible to download the required amount of information.</p> <p>(CM / AW) Thank you. We will also bear this in mind.</p>	<p>CM / AW</p>
<p>5.</p> <p>5.1</p> <p>5.2</p> <p>5.3</p>	<p>Digitising indexes to Foreign Office correspondence: options for the presentation of images</p> <p>EH gave some background information on the project and explained how the reference converter would work, asking for feedback from the group.</p> <p>Delegates raised a number of issues and questions:</p> <p>Is there a way for users to highlight documents that are referred to in the Foreign Office Indexes, but that have not survived?</p> <p>(EH) Users can contact the Diplomatic and Colonial team to let them know of files that have not survived. However, there isn't currently a formal process for this. <i>(Post meeting note: we will look into ways of enabling users to do this).</i></p> <p>Are we aware of the value of the indexes themselves where the</p>	

	<p>original file has not survived?</p> <p>(EH) Yes, we are very aware of the value of this resource as a record in its own right. In many cases, the information in the index may be the only evidence that correspondence took place on a particular issue.</p> <p>5.4 The converter looks really useful, are there plans to expand the service to other series?</p> <p>(EH) This certainly might be considered next financial year if the converter is successful and there is sufficient budget. (CM) the converter is being developed as one project within the broader Modernising Public Services Programme which is delivering a number of improvements to public services this year. It is possible that a similar programme may be run next year.</p> <p>5.5 When will the service go live and how much has it cost to develop?</p> <p>(EH) The service should go live in either late March or early April 2011. Digitisation of the Foreign Office indexes cost approximately £30K but was completed last Financial Year. The converter was developed in-house.</p>	
<p>6.</p> <p>6.1</p> <p>6.2</p> <p>6.3</p>	<p>Business Planning cycle: your input</p> <p>CM explained that we talked about the longer term Business Plan for 2011 – 2014 and our strategic priorities for this 4 year period at the last meeting. We are now seeking input form the User Advisory Group on the shorter term Business priorities for the forthcoming Financial Year.</p> <p>Delegates raised a number of suggestions:</p> <p>Digitisation of the 3 remaining collations of Post First World War service records</p> <p>(CM) We are currently looking at the other MOD files to assess the feasibility of taking this on.</p> <p>In relation to Academic and Social History research, consider digitising less well known / less well used series of records, so as to open the records up for new academic research. Make this an ongoing consideration in the digitisation strategy.</p> <p>(CM) We would certainly be willing to consider specific examples of series that fall in to this category. Our digitisation strategy is already quite flexible; some projects are chosen for commercial reasons while other decisions are based on other criteria such as access or usage. A robust assessment process takes place when</p>	

<p>6.4</p> <p>6.5</p> <p>6.6</p> <p>6.7</p>	<p>considering digitisation projects. However, we are willing to listen to suggestions from individual users and the User Advisory Group.</p> <p>Consider more opportunities to increase external funding.</p> <p>(CM) We would certainly welcome suggestions for external funding. However, we must consider that some funding opportunities don't necessarily make an impact on the bottom line. For example if we are funded to complete a specific project that we would otherwise not do, this doesn't actually affect our bottom line (although there maybe other entirely valid reasons for doing such a project). It is much harder to get funding for our business as usual activities.</p> <p>Consider creating Apps as a way of generating income. This has been done successfully by the British Library.</p> <p>(CM) We have looked in to this and will continue to do so. However, there are restrictions on what we can do as a government organisation.</p> <p>Continue to consider projects that look at issues around equality and diversity. For example; digitisation projects that tie in with military anniversaries and include records of pensions and disability.</p> <p>Maintain consistency regarding diversity. Look at working in partnership with other organisations.</p> <p>(CM) We are currently involved in some diversity related projects, such as Caribbean through a lens, which follows on from the successful Africa through a lens project. However, we are aware that more could be done in this area.</p> <p>Consider how TNA could be involved in the Olympics / Cultural Olympics.</p> <p>(MH) We are looking at ways in which we could be involved in this. We don't have a huge collection of records from the previous Olympics. However we plan to use what we have to complement the work already underway to support the legacy for this (coming) Olympics.</p>	
<p>7.</p> <p>7.1</p>	<p>Standing items</p> <p>Attention was drawn to the Standing agenda item updates. A number of points were raised by Delegates:</p> <p>Cataloguing Update</p> <p>JG and JLa introduced themselves and explained that their attendance would become a standing item in response to a</p>	

	<p>request from one of the delegates. The Cataloguing Update provided on this occasion is of cataloguing projects completed in the last financial year (<i>post meeting note: there is now a 'live' document on the website which provides this information: http://www.nationalarchives.gov.uk/about/cataloguing-projects-10-11.htm). It was agreed that a list of current projects would be provided for future meetings along with a copy of the reserve list (which lists possible future projects that are under consideration).</i></p>	<p>JG / JLa</p>
<p>7.2</p>	<p>Please can the paper catalogue be kept?</p> <p>(JG) There is no plan to dispense with the paper catalogue <u>in its entirety</u> but we appreciate the need for clarity regarding the disposal process and will look into the issue. <i>(Post meeting note: there has been some disagreement regarding what exactly was said at the meeting regarding the disposal of the paper catalogue, with some users feeling that there was an implication that we would be going back on our original plans. The original plan, which we can confirm has not changed, is to gradually reduce the paper catalogue in a controlled manner as and when we are confident that a particular part of the catalogue is user friendly and robust online. We do not intend to consult on this overall approach, however we value and encourage user input in identifying specific parts of the catalogue where there are particular issues with searching and browsing online. Going forward, we would invite user input in helping us identify solutions to such issues, which will help us to make the catalogue increasingly accessible to our users worldwide.)</i></p> <p>Public Services Update</p>	
<p>7.3</p>	<p>SL gave some background to the WO 95 digitisation item: WO 95 (First World War and Army of Occupation War Diaries) is one of the most heavily ordered series of original records at TNA. We believe that by making it available online we could increase its popularity even further and open it up to sections of our audience that are unable to get to Kew. With the First World War anniversary in 2014, the project is also planned both to meet the expected increase in demand for the series as well as to mark the anniversary.</p>	
<p>7.4</p>	<p>(CM) The project will take approximately 2 years to complete and will involve the indexing of a further 5 fields within the records in order to increase searchability (the records are known to be difficult to search currently). There is limited scope for commercial opportunity due to the series having a low concentration of names. However, the records are rich in narrative content.</p>	
<p>7.5</p>	<p>How much is this project costing?</p> <p>(CM) it is costing approximately £590K over 2 years. Due to the likelihood that the series will become increasingly popular as the</p>	

	<p>anniversary of the First World War approaches, and as the documents are increasingly fragile due to the high level of use, a decision has been made that it is worth spending the money to digitise these records.</p>	
7.6	<p>Where will the London Family History Centre be located?</p> <p>(SL) Towards the back of the Open Reading Room in a dedicated area with its own dedicated helpdesk.</p> <p>Digitisation Update</p>	
7.7	<p>Please can you explain the difference between 'LIAs' and 'Non-exclusive launches'?</p> <p>(SL) We are currently working on some clear definitions of these different types of licenses, and would like to share these with the group once complete (partly to get some feedback on the clarity of the explanations).</p>	SL / JL
7.	<p>Any other business</p>	
7.1	<p>Any Other Business has run out of time, is there a possibility to include specific items in AOB in the future, so as to ensure that sufficient time is left to cover all items?</p> <p>(CM) Yes, if you let us know in advance and there is agreement that the items are appropriate they could be added to the agenda. CM to liaise with JJ on the issue.</p>	CM
8.	<p>Date of Next Meeting: 06/12/2011 at 11.30, Blue Room</p>	