

# User Advisory Group Minutes

Title: User Advisory Group  
Date of Meeting: 17 June 2014  
Location: The National Archives

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## Attendees:

### Staff

Mary Gledhill (MG) – Commercial Director (Chair)  
Caroline Ottaway-Searle (COS) – Director of Public Services and Human Resource  
Emma Allen – Head of Web Team (EA)  
Paul Lamey – User Experience Manager (PL)  
Maria Cieslak – Web Designer/Developer (MC)  
Emma Bayne – Head of Systems Development (EB)  
Caroline Kimbell – Head of Licensing (CK)  
Chris Mumby - Head of Digitisation Services (CM)  
Janet Dempsey – Principal Records Specialist – Maritime (JD)  
Foluke Abiona – Customer Intelligence Officer (FA)  
Joanna Robinson – Customer Intelligence Assistant (JCR) (Minutes)

### Delegates

Gillian Stevens (GS) – Onsite Personal Interest Users  
Graham Woolgar (GW) – Onsite Personal Interest Users  
Susan Moore (SM) – Map Room Users  
Margaret O’Sullivan (MO’S) - County/External Archives  
Nell Darby (ND) – Online Users  
Dr Nicola Phillips (NP) – Map Room Users  
Jacqui Kirk (JK) – Independent Researchers  
Rosemary Morgan (RM) – Independent Researchers  
Else Churchill (EC) - Family History Societies  
Jo Pugh (JP) – Student Users

### Apologies

Professor Grace Ioppolo (GI) – Academic users  
Professor Anne Laurence (AL) – Academic Users

Item		Action
1.	<b>Minutes and Matters Arising and General Updates</b>	
1.1	MG welcomed delegates to the meeting. She welcomed JP, the new delegate for Student Users, to his first UAG meeting. MG advised delegates that ND is now the new Online Users delegate.	
1.2	<p>(Item 1.5 18/3) MG updated UAG to the effect that TNA is now looking at both options, publishing 'in-house' and by a partner. Digitised documents may now appear on Discovery first, and then on licenced websites subsequently.</p> <p>GW said the original date had been set for the first quarter of 2014. This was then changed to the third quarter, and is now set for the first quarter of 2015. Why have there been these delays?</p> <p>The original delay was due to a procurement issue; although the issue was resolved it had a knock on effect, and the compounding of resource limitations and competing demands on staff has led to further delay. However, MG said she hoped that publication would, in fact, still be in 2014.</p>	
1.3	<p>(Item 15 18/3) GW said that LMO had said that using commercial publishers gives a better return to the public purse. Can this be explained?</p> <p>Commercial publishers pay for digitisation to be carried out. They also take on all the risks and costs of publishing. Commercial publishers also have bigger audiences than Discovery does. Using commercial publishers therefore makes economic sense for many records sets. The commercial publishers pay royalties to TNA in return for the right to publish digitised records.</p> <p>In the case of the Royal Naval Service cards and ledgers, TNA has paid for them to be digitised, as i) we are accessioning the records digitally rather than in paper form and ii) both of our main genealogy partners have published records from the existing ADM 188 series. In this case therefore we will have the option of publishing the images on Discovery and/or offering the images under a license to our genealogy partners. The commercial partners will pay TNA for the digital images which will help us to recoup the costs of digitisation.</p>	
1.4	(Item 4 18/3) TNA's FWW100 programme continues and we are currently recruiting volunteers to help with sorting for the next phase of digitisation of the Unit War Diaries. We will also be updating our FWW100 online presence to reflect the latest events and activities, including the first data to emerge from our crowdsourcing project Operation War Diary.	
1.5	(Item 4.6 18/3) There are a few tickets available for our first conference on WWI programme <a href="http://www.nationalarchives.gov.uk/events/first-world-war-conference.htm">http://www.nationalarchives.gov.uk/events/first-world-war-conference.htm</a> at the end of June.	
1.6	(Item 4.9 18/3) As part of the planned update to our FWW100 pages online we will look at incorporating links to the Open University/Jeremy Paxman pages.	

<p>1.7</p> <p>1.8</p> <p>1.9</p> <p>1.10</p> <p>1.11</p> <p>1.12</p>	<p>(Item 5.2 18/3) GS said this item had been incorrectly minuted. She had said delegates could be allowed to change roles within UAG within the four year cut off point.</p> <p>(Item 5.4 18/3) MG said she had a tele-conference with Anne Laurence and Grace loppolo regarding the recruitment of a new Academic User in the autumn. It was a useful discussion which included ideas on how to alert potential academic candidates to the recruitment campaign, and what skills or expertise we should be particularly seeking this time. Further details will feed into our planning for the recruitment campaign (to be discussed at the next meeting).</p> <p>(Item 5.9 18/3) We will initiate a similar conversation to that mentioned in the previous item (item 1.8) regarding the recruitment of a Map Room User delegate.</p> <p>(Item 5.8 18/3) GW asked if his recommendation that delegates are not asked to step down until a replacement is ready to take over had been accepted.</p> <p>COS said this would be acceptable.</p> <p>MG said that we expect to start recruiting for new UAG delegates in the Autumn, and to have them in place for the December UAG meeting.</p> <p>(Item 6.8 18/03) MOS said this was incorrectly minuted – several Audience Engagement officers have been appointed in ASD.</p> <p>GW said he had submitted an item for ‘Delegate Submitted items’ which had not appeared on the agenda.</p> <p>MG said that the agenda may have been completed before this submission was received but that we were happy to address the suggested item. In view of the range and scope of Delegate Submitted items on the agenda it was agreed that we should schedule a longer time for these items (30 minutes) in future agendas.</p>	
<p><b>2.</b></p>	<p><b>Website Design and Accessibility Presentation</b></p>	
<p>2.1</p> <p>2.2</p>	<p>This item was partly in response to a paper prepared as a Delegate Submitted item by JK. The paper raised a number of questions about accessibility in its broadest sense, both online and in the reading rooms and has already provoked discussion and some actions at TNA.</p> <p>EA, PL and MC gave a presentation setting out what TNA is doing to make our website accessible. EA pointed out that there are different definitions of accessibility; for example her definition includes accessibility not only for disabled users but ensures that everyone is able to satisfactorily access the TNA website by being provided with suitable tools which can cater to their needs and requirements. She said that there is no reason why technology cannot be utilised to cater to users with differing needs at the same time.</p> <p>PL spoke about the wide spectrum of visual and hearing impairments that some users experience and some of the tools which can help ensure that information is still easily accessible; for example tools such as screen readers which can provide auditory versions of on-screen information, and screen magnifiers.</p> <p>He then spoke about other requirements some users have, and the various tools which can assist the provision of access. These include tools which can assist</p>	

	<p>people with cognitive difficulties, and some which are helpful to users with epilepsy, and tools which can be accessed by people with mobility impairments, such as keyboard commands to tap through menus. PL also explained that the term 'accessibility' can be widened to include considerations of how the website can be made accessible to users whose computers are running old and outdated browsers.</p>	
<p>2.3</p>	<p>JK said that the needs spoken about so far are extremes. She said that she teaches family history research skills mainly to the retired and that her concern is for users who are ageing and becoming 'physically inconvenienced' and are now unable to do things that younger people take for granted. She said that many retired people find it difficult to multi-task, or learn to use a mouse, and she expressed concerns about the concept of user-testing new methods; she said that although these tests aim to ascertain how successful new enabling initiatives are, in her experience many people who would benefit from improved accessibility would simply not be able to work out how to use testing methods, such as beta sites. She said we need to look at 'usability' as well as 'accessibility'.</p> <p>PL said that we agree with this, and that accessibility is a holistic matter which includes layout, functionality, intuitiveness, and usability. He said that in terms of accessibility, web content must be accessible to everybody. He said that we aim for 'inclusive design', and embed this concept in to our design process to ensure that our services are useable by all.</p> <p>MC and EA said that they would be interested in arranging a consultation with JK's groups in order to better understand their needs and requirements. They also pointed out that they travel across the country as part of the user testing process, and are always interested in new contacts for user testing audiences.</p>	
<p>2.4</p>	<p>GW asked if a consideration of platform is a concern as well.</p> <p>PL and EA said this is something we are very conscious of; our website is widely accessed through mobile and tablet platforms so it is an important element of our design process to ensure that website improvements are usable on devices. MC said that no matter what device is used, the TNA site will shrink to fit.</p>	
<p>2.5</p>	<p>SM said that the TNA website is now far too busy and garish.</p> <p>MC said that developments were not made without consultation, and that real life responses are the most valuable indicator of the success of developments. We have had to make compromises with the design of the site. We undertook user testing on a range of design ideas, which included some very plain, non-image led design; however the image-rich version proved to be the most popular.</p> <p>JK said the first sections underneath 'Explore our records' on the home page are made less visible by the dominating images and thick black border; the words cannot be seen, and the layout is too complicated and busy for people to navigate. She added however, that overall it is a good website.</p> <p>JP suggested that there was surely nothing wrong with people taking time to experiment and discover how the website works for them.</p>	
<p>2.6</p>	<p>GW asked how we obtain the 'balanced' panels of users for testing.</p> <p>PL explained that we carry out lots of research into who our audiences are, and gather data including: the ranges of user behaviour; people who are using us for the first time; intermittent users, and older users. We create 'personas' from the</p>	

	<p>results information gathered and from here we can build an understanding of the range of people we need to consult and cater for. The Start Here section, for example, was created with the non-professional user in mind. He pointed out that not everything can be fully accessible, but that we work to ensure we do as much as possible.</p>	
2.7	<p>JK asked if the Accessibility link could be put into the main menu.</p> <p>MC and EA agreed to this.</p>	
2.8	<p>MG thanked JK for her paper which had prompted an interesting and useful discussion. As there was not sufficient time to fully cover the reading room aspects of the paper, it was agreed to schedule a further item on accessibility at Kew for the September meeting.</p>	
2.9	<p>SM requested a response specifically re. the provision of desk lamps in the Map and Large Document Reading Room before the next meeting if possible.</p>	
<b>3.</b>	<b>Update on Discovery II</b>	
3.1	<p>EB said that we are getting close to making Discovery II live. She explained that Discovery II will hold references to 10,000,000 more non-TNA records, will be served by a new search engine, will have new search logic, and will have an extended advanced search. She said that 20 Discovery II workshops were held, and changes have subsequently been made to the prototype. She advised delegates that there will be a period of running Discovery II alongside the current Discovery.</p> <p>A link to the updated beta version will be sent to delegates. EB requested that delegates forward this to their user communities so we can gather their feedback. She also asked if delegates could pass on any feedback they receive to us.</p> <p>JK suggested contacting county archives and record offices, as the changes to A2A will affect them. EB said that suggestions from delegates on how to publicise the beta version of Discovery II were welcomed.</p>	
<b>5.</b>	<b>Delegate submitted items</b>	
5.1	<p><b>Merchant Navy 1915 Crew Lists project</b></p> <p>GW asked for clarification on where the 1915 Merchant Navy Crew lists are held. JD explained that when the crew lists were being divided up, TNA took 10% of the overall lists including 10% of the 1915 lists. The other 90% were offered as gifts to other institutions. National Maritime Museum took the remainder of the lists for years ending in 5 (about 10% overall). Various local archives picked out lists connected to their area (another 10%) The remainder (about 70%) went to the Maritime History Archive in Newfoundland, Canada.</p> <p>TNA and NMM decided to jointly transcribe these records for 1915 as 100% of the records for 1915 are in just those two institutions. The 10% of TNA records are in BT 99 and also in BT 100, which is an artificial collection comprised of a small collection of celebrated ships. For the information to go on Discovery, the 90% of crew lists at the National Maritime Museum have been classified as BT 400 with clear indication on Discovery that these are not held at TNA. The collection is</p>	

<p>5.2</p> <p>5.3</p>	<p>currently in the process of being transcribed and checked by volunteers. Although we photographed some of the pages of the crew lists for use in the transcription process they are not of a suitable quality to be made available online.</p> <p>JD explained that before this project, if a researcher didn't know the name of a ship, it would be impossible to search these records. The transcriptions can be searched in several different ways, for example by job description as well as by name. The transcriptions will be uploaded in significant numbers throughout the coming months with a full launch in Spring 2015.</p> <p><b>New Representative starter/briefing pack.</b></p> <p>JK said that as a new representative, she would like to hear other delegates' thoughts on providing a starter pack for new UAG recruits. She suggested that as delegates are volunteers, and fulfil their role outside 'office hours' it would be useful to have the pack in paper form.</p> <p>MG said that TNA staff agree that having a new starter pack is a sensible suggestion. As we are looking at a bigger turn over of delegates this year, it would be useful to have something which can provide information to assist new delegates in settling into their role quickly.</p> <p>EC suggested the pack could include lists and links to TNA website pages that delegates would be likely to need to refer to as part of their role.</p> <p>MOS said it is usual to have a formal Terms of Reference for a group. She pointed out that some of the subjects under discussion at UAG are confidential, and suggested that the division between subjects which need to be kept within UAG and those which can be disseminated to user communities should be made more explicit.</p> <p>RK said it would be useful if the pack explained the remit of UAG and also the differences between UAG and the User Forum.</p> <p>MG asked if JK would be willing to work with us putting together a pack, probably in August. JK agreed, and GS also volunteered to help.</p> <p><b>AIR 79</b></p> <p>GW said that the description of AIR 79 on Discovery states that some records are not yet available, but will be transferred in the future. If the individuals in these records enlisted by 1928, their dates of birth would surely have been of an early enough date to allow their records to have been released by now.</p> <p>CK said that there are approximately 15 individuals whose date of birth is still within the last 100 years, and therefore cannot yet be released.</p>	
<p>6.</p>	<p><b>Reconciliation of Digitised records</b></p>	

6.1	<p>GW said he had detected about 500 records which had not been captured during the digitisation of BT 351, and a large number of records which had not been loaded into Discovery after the digitisation of BT 377. He asked how TNA would, in future, ensure that all relevant images are captured and uploaded when undertaking digitisation projects.</p> <p>CM said we have been digitising records for many years. Some of the issues GW has raised include points we have already identified, including instances of technical problems during early digital uploads which sometimes did not complete correctly. Some of these earlier digitisations have therefore left us with legacy issues. However, technology is improving all the time, and we have also been improving our processes.</p> <p>CM said he created a dedicated internal Quality Assurance team last year. The QA team is professionally responsible for ensuring the quality of our digitised collections. Where records have been digitised internally, the QA Team go through 100% of the digitised files comparing them with the paper records on a page by image basis ensuring that any errors in either quality or number of images produced can be rectified. When images have been produced by commercial partners, it is the responsibility of the digitisation contractor to do their own QA checks before delivering the images to TNA. Our QA Team then carries out a statistically significant sample check on the contractors' work so that we are satisfied that they have carried out the digitisation and QA to the appropriate standards.</p> <p>CM reminded UAG that any 'human' counting and checking process during digitisation will be subject to the possibility of errors and that when we are digitising thousands of large documents it is not physically possible to count every page. Where possible we increasingly use technical tools to overcome these challenges, so for example we now use monitoring software when we upload images to Discovery, so that we can tell immediately if the process has failed part way through.</p>	
7.	<b>1939 Registers Project - Update</b>	
7.1	<p>It has been publicly announced that TNA has awarded a contract for the digitisation of the 1939 Health Registers to Find My Past. CK highlighted how important the project will be for genealogical purposes and gave a presentation which provided more detail of the records and the plans for release. UAG members were asked to keep the additional information confidential at this stage of the project.</p>	
8.	<b>Expert Involvement in Digitisation</b>	
10.1	<p>GW had asked for an item which TNA had included in the September UAG digitisation cover sheet should be discussed at this UAG, since it had not been discussed originally, due to lack of time. This was, quote, 'We would welcome a conversation about achieving appropriate levels of input from non-staff records experts.'</p> <p>MG said that our position has not changed on the matter of public consultation</p>	

	<p>which is that a formal consultation requirement would be likely to deflect our scarce resources away from actually delivering digitisation projects, and have limited value. We do recognise that there are members of the public who are 'experts' with regard to particular collections of records, and where they are known to us we will invite their input to our digitisation projects at an early stage as their advice can be invaluable in helping us to make the projects a success.</p> <p>GW said that not all expertise is based at TNA and that he would like TNA to work more with experts in different fields.</p> <p>SM asked if delegates should ask their user groups to look at digitisation projects and get in touch if there are people with expertise on particular issues.</p> <p>MG said we are always interested in hearing from users. She said that when it comes to decisions about digitisation and cataloguing TNA relies largely on input from the ARK Record Specialists who are quite often aware of the most prolific and expert users of the records in their particular area. However it is true that they may not always alert us to relevant users and may not be aware of online users who are not regular visitors to Kew.</p> <p>GW said there is no digitisation page on the website.</p> <p>MG said that we do publicise our major licensing opportunities. (See: <a href="http://www.nationalarchives.gov.uk/commercial/licensing-opportunities.htm">http://www.nationalarchives.gov.uk/commercial/licensing-opportunities.htm</a> ). However projects which have been initiated by potential partners do not appear on this page and cannot be widely publicised for reasons of commercial confidentiality.</p>	
<p><b>9.</b></p>	<p><b>UAG Recruitment Update</b></p>	
<p>9.1</p>	<p>COS reminded UAG that we have two vacancies for Diversity/Inclusion delegates. TNA's new Equality and Diversity officer has drafted some revised wording for the advertisement of these positions which is designed to be more inclusive (the revised wording was circulated in the meeting). She has also been compiling a list of outreach contacts and others across the sector who may be able to help us to alert users to the possibility of becoming a UAG delegate. We are planning to go ahead with the recruitment drive for the Diversity/Inclusion delegates before the next meeting and will advise UAG when the advertisement is live so that they can spread the word.</p>	
<p><b>10.</b></p>	<p><b>AOB</b></p>	
<p>10.1</p>	<p>JK suggested it would be useful if TNA could sort the digitisation updates into two sections: 'Commercially sensitive' and 'Commercially non-sensitive'. She said this would make it simpler for to delegates who wish to share non-sensitive information with their user communities.</p>	
	<p>10.2</p>	
	<p>JK also requested that explanations are given for the reference numbers on UAG papers concerning cataloguing and digitisation updates, so delegates know what these series are.</p>	

10.3	<p>It was suggested that guidance on how well a particular set of records has been catalogued would be useful so that researchers can assess whether a failed search is due to a record not existing or just due to the records not being fully catalogued.</p>	
10.4	<p>NP asked if would be possible to search within Chancery records by female name references. It is not possible in C11; could this be changed?</p>	
10.5	<p>RM passed on some criticisms about the new London Gazette website, including that it was difficult to access and navigate.</p> <p>There was a short discussions with mixed views expressed about whether the redevelopment of The Gazette website was an improvement or not for historians.</p> <p>MG said that TNA could invite a representative of TSO (the company who manage The Gazette website) to speak to UAG if there is sufficient interest.</p> <p><i>Post meeting note: Following a further discussion with RM, MG agreed to investigate whether the specific issues raised by RM's contact are already being addressed by TSO in response to feedback from TNA's records experts. The option of inviting TSO to a future meeting remains open.</i></p>	
10.6	<p>RM said she was concerned that the Tithe maps are only searchable by name.</p> <p>SM said it was very unhelpful that they are not searchable by place.</p>	
10.7	<p>GW asked when there was going to be any progress on the release of the Army Service Records between the Wars, a question raised again recently by Peter Gallagher.</p> <p>MG said that we have made progress with MoD over the last few months on the development of option for the Army Service Records. We now have a full picture of the quantity of records involved and CK has visited the site where they are stored and is in correspondence with the MoD and their storage supplier regarding potential approaches. Due to the scale of the Army collection and the way that the records are organised we have to think carefully about how to create a workable and cost effective proposal. As soon as we have a solution that we think will work, we will bring it to UAG for discussion.</p> <p>GW expressed dissatisfaction with the MoD's approach to deciding a cut-off date of birth, which defines the set of soldiers' papers they consider should be released (referring to previous correspondence and meetings including the Extraordinary User Forum in May 2013) and the slow progress on the Army Service records, in particular that it has been six years since the MoD's public consultation on the four collections.</p>	
10.8	<p>JP asked why three letter codes, as opposed to other mechanisms such as tagging, faceting etc., were being applied to the Chancery records to describe certain characteristics. He said he was concerned that these are not easily comprehensible to the casual user, and could proliferate. He asked if there is guidance available for using the codes.</p> <p><i>[Post meeting note: Dr Amanda Bevan, Principal Records Specialist (Legal Records) supplied a response to this matter: 'The codes have been applied for some years now, from well before the time that tagging was available as an option. They are applied as part of the cataloguing process, and were devised in response to the request of academic researchers to somehow make the role of</i></p>	

	<p>women in litigation much clearer. They have been greeted with acclaim by the community that use them, and are seen as a major advantage in constructing research questions. TNA has recently been granted a PhD studentship to look at women litigating in late 17<sup>th</sup> century Yorkshire, where the research topic was only feasible because of these codes. We deliberately chose letter groups which do not otherwise appear, or only appear very infrequently indeed. The codes are described in the series level description of the series in which they appear.’ Please see the following link to see the text included in the description for C1: <a href="http://discovery.nationalarchives.gov.uk/SearchUI/Details?uri=C3564">http://discovery.nationalarchives.gov.uk/SearchUI/Details?uri=C3564</a></p>	
11.	<b>Next meeting: Tuesday 16 September 2014, 12:00-14:30</b>	