Title: The National Archives' User Forum
Date: 06 January 2012
Location: Talks Room

Attendees (staff):
Jeff James (JJ), Director of Operations and Services (Chair)
Mary Gledhill (MG), Commercial Director
Chris Mumby (CM), Head of Commercial Delivery
Val Johnson (VJ), Research and Policy Manager
Ruth Roberts (RR), Research and Academic Liaison Advisor
Donald Phillips (DP), User Experience Manager
Matthew Norman (MN), Knowledge Transfer Editor
Lee Oliver (LO), Head of Public Services Development
Tom Gregan (TG), Head of Document Services
James Lawson (JL), Customer Intelligence Manager

Attendees (users): Graham Woolgar, Richard Bateson, Peter Gallagher, Ron Platt, Bob O'Hara, Alan Shelley, Tom Tulloch-Marshall, Jasmine Belloni, B A Thompson, Gillian Stevens, P C Sekaran

Matters arising from the last meeting

JL had investigated the addition of some text on the website to encourage the return of locker keys that have been taken home accidentally. However, it was agreed that text on the website would be less effective than the onsite signage that has already been put up. The only logical place on the website for the text would be the 'visit us' area but this tends to be used predominantly by visitors planning their first visit.

JL had met with the Health and Safety Advisor and reported the concerns raised at the last meeting regarding our first aid procedures. A response had been sent directly to the user who had raised the concerns.

CC confirmed that Security Officers should not ask users to leave the building before closing time and reported that he had recently reminded Officers in response to this being raised at the last meeting. Security Officers are encouraged to remind users of the Document Reading Room, approximately 15 minutes before closing, to return their documents 5 minutes before the building closes.

Updates / information

Scaffolding will be going up next week to enable the **replacement of the roof** in the Q2 side of the building. This will affect the link area around the main entrance. There will be some disruption in the following months as this essential work is completed, so please bear with us and proceed with caution.

The **Discovery service** (The National Archives' new tool for searching and accessing our collections) has been available in beta (test) form since March 2011 and we have continually made improvements to it over the past months, in response to user feedback. Many of you have been directly involved in this process and your feedback has been extremely valuable.

Early in 2012 we will be making the Discovery service the default search facility for searching The National Archives catalogue data, both online and on site.

The old catalogue will continue to be accessible until the end of the Financial Year when it is planned that the Discovery service will completely replace the catalogue. However, access to the old catalogue will be less direct during this period, encouraging use of Discovery as the default search as much as possible over the coming months.

This will mean that regular users get used to using Discovery before it completely replaces the old catalogue. It will also mean that any further usability issues with search in Discovery will be highlighted and addressed.

We would very much value your continued feedback during this period, which will help us to improve Discovery as much as possible before it replaces the catalogue. We will continue to keep you updated on any developments.

Update on the December 2011 User Advisory Group meeting - Graham Woolgar, User Advisory Group Delegate

JJ noted that there will be a regular item at those User Forums which follow User Advisory Group (UAG) meetings, providing an opportunity for UAG delegates to update users on the topics discussed at the meetings.

Graham Woolgar, one of the User Advisory Group (UAG) Delegates for Onsite Personal Interest users gave an update on the topics discussed at the UAG that are of particular interest to onsite 'personal interest' users of our services.

Topics discussed included:

- An update on progress to date and future plans for the Discovery service
- The addition to the agenda of a standing item for Delegate Submitted Items (users who are interested in having items raised by their delegates can find their contact details here: http://www.nationalarchives.gov.uk/get-involved/user-advisory-group.htm)
- The gradual and incremental removal of the paper catalogue from the reading rooms
- An update on a project to pilot an online community for The National Archives
- An update on a project to digitise the Home Guard records and a request for this topic to be discussed at the User Forum
- Succession planning for UAG membership
- A request to review the Terms of Reference for, and success of, both the UAG and the User Forum (to include a clarification of their separate roles and functions) as we approach the anniversary of the last review of user engagement at The National Archives.

The National Archives' new Research Strategy - Val Johnson, Research and Policy Manager and Ruth Roberts, Research and Academic Liaison Advisor

Val and Ruth gave a presentation detailing The National Archives' new Research Strategy (see separate presentation document) and answered questions:

Q. Where does the funding for The National Archives' research activities come from?
A. (VJ) Some of the funding comes from inside the organisation. The organisation has an investment bid process, so we as a department can bid for funding in that way. We also receive a lot of our funding from outside of the organisation, through various research organisations and grants bodies. We have recently acquired status as an Independent Research Organisation, which has broadened the scope for external funding. We hope that the new research strategy will improve our ability to obtain external funding.

Q. I see it as a great coup for Lisa Jardine to have joined the Management Board. I expect she will be behind everything that you do?
A. (VJ) Yes, I am very pleased about this. I haven't had the opportunity to meet her yet but look forward to doing so.

Q. How will the Independent Researchers Community benefit from the new Research Strategy?
A. (VJ / JJ) We always look carefully at broader benefits to us as an organisation, our users and the wider archives sector when considering research proposals. For example, many projects to date have had wide reaching benefits in opening up access to our holdings and making our services easier to use. Research usually culminates in a tangible end product that is of benefit to our users (for example a research guide or paper) and we work closely with colleagues in the Advice and Records Knowledge Department on our research priorities, to ensure that research is focused on areas where it is important for us to improve (for example where there are gaps in our research guidance or knowledge).

Records Website Project: changes to the records section of our website - Donald Phillips, User Experience Manager and Matthew Norman, Knowledge Transfer Editor.

Donald and Matt gave a presentation on a number of changes that are due to be made to the Records section of the website, following a project to review, reorganise and enhance the provision of records and research guidance on the site (see separate presentation document). They also responded to questions on the subject:

Q. When will these changes be made to the website?
A. (DP) The changes will go live towards the end of January. *(Post meeting note: the new Research Guidance A – Z has now gone live and can be found here: http://www.nationalarchives.gov.uk/records/atoz/default.htm)*

Q. Where will the newly organised guidance be found? Will it be integrated with Discovery?
A. (DP) The new guidance will essentially be in the same place as it is currently, under the main 'Records' heading on the website and it will still be possible to browse by clicking 'Looking for a person' etc… However, all of the guidance will now also be browseable by keyword in a single alphabetical list. Where the guides currently include links to the old online catalogue, those links will, in due course, be updated to link to Discovery. There will also be lots of links from Discovery to the research guidance but the guidance will not actually sit within Discovery. The guidance available from the old online catalogue is just the old in depth Research Guides (not the newer Research Signposts or Animated Guides) whereas Discovery will link to all of the above, as appropriate.

Actions and questions

JJ / JL to organise a review of the Terms of Reference for both the User Forum and the User Advisory Group, for the next UAG meeting (6th March) and the following User Forum (12th April).

JJ / JL to come back to the next UAG meeting and April User Forum meeting with a 'road map' regarding our plans for the gradual removal of the paper catalogue from the reading rooms.

ALL to provide us with feedback regarding particular parts of the paper catalogue which are difficult to browse in their online equivalent.

JJ / JL to include an update on the pilot project to digitise the Home Guard records on the agenda for the next meeting.

Q. I always found the catalogue search tips which were provided as part of the annual Catalogue Day very useful. Would you consider doing something similar for Discovery?
A. JL to pass this feedback to the Discovery team.

Q. Can something be done about the speed of the computers in the reading rooms at peak times. They can get very slow.
A. (JJ) We are currently running a pilot to replace the computers in the reading rooms with 'thin clients' (terminals which are run through a server session rather than their own hardware) which reduce power and enable increased control and efficiency. This may go some way to addressing the speed issues. However, it is important to note that there are a lot of factors to consider in how fast the computers run (including external factors) some of which we have little control over.

Q. There are 4 collations of service records that are due to be transferred to The National Archives. Why aren't these records being digitised in-house?
A. (CM) Our main focus at the moment is on the pilot digitisation of the Home Guard records. However, we will be digitising the Air Force records in-house.

Q. Do you have a date for when this will be done?
A. (CM) Not currently as our focus is with the Home Guard records. However we will let you know when we have a clearer idea of dates.

Q. I find the new self service document scanning machines very difficult to use compared to the copying machines that you used to have.

A. (LO / TG) We are aware that in some cases the machines are currently producing poor copies. However, the benefits to all, once the teething problems with this new technology are resolved, will outweigh the temporary issues that we are experiencing. We are always very keen to look at any specific examples of poor quality results you get from the machines. Please remember Richard Groococks' invitation at a previous meeting, to speak to him directly if you are getting poor results. This will mean that we can both provide advice on how to improve your copies and record the problems as they arise and gain a better understanding of the issues.

Q. It's very frustrating that you can download documents from DocumentsOnline for free on site but there is no way to save the downloaded image. Would it be possible to enable users to download the images to their own laptops?

A. (LO) We are currently investigating a number of different ways to enable users to obtain an electronic copy of documents from DocumentsOnline, as we are aware that it is currently only possible to print out a paper copy to take away. However none of the potential solutions are straightforward so it may take some time to resolve this issue.

Q. Can you tell us about the looted art international project?

A. (JJ) We will take this away.

Post meeting note: The National Archives were asked to contribute to this project by the US National Archives and Records Administration (NARA) along with Bundesarchiv in Berlin and the Archives Nationale de France. The landing page for the project on the DocumentsOnline site contains very detailed background information on the project, as well as the material that we hold:
http://www.nationalarchives.gov.uk/documentsonline/looted-art.asp
Not all of the material has been loaded yet because we have been waiting for the proof-read and approved detailed descriptions, which were compiled by researchers working for the Looted Art Commission (http://www.lootedart.com/). However, this is now nearly complete, so the remaining content will be going online in the next few weeks.
The documents held by The National Archives have been identified over many years by researchers, and the full content list is available on Docs Online. Opening dates for the files are all in the catalogue. Our main contribution constitutes the records of the Vaucher Commission in the series T209

Next meeting

The next meeting is on Tuesday 7th February 2012 at 11am in **Conference Room A**

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