

**Title: The National Archives' User Forum**  
**Date: 16<sup>th</sup> August 2018, 12.30pm – 1.30pm**  
**Location: Talks Room**

**Attendees (Staff):**

Lee Oliver (LO) – Head of Venue Management and Services (chair)  
Tom Gregan (TG) – Head of Document Services  
David Priest (DP) – Document Production Coordination Manager  
Ailsa Vigrass (AV) – PA to Val Johnson and Neil Curtis (notes)

**Attendees (users):**

David Matthew  
Chris Eley  
Jackie Speel  
Pauline Eismark  
Scott Reeve  
Eddie Dapre  
Roger Smith  
Enid Ackers

**1. LO welcomed all to the meeting.**

**2. Matters Arising - May meeting notes.**

2.1 The second iteration of item 3.5 is to be renumbered to 3.6 and all subsequent items under (3)

2.2 Item 3.5 – large luggage storage facilities. LO clarified that the 'Kew Station' referred to in item 3.5 was Kew Gardens station.

2.3 Item 2.2 – late night opening. *Only being able to order documents up to 4pm on the late nights is inconvenient for users, could this be extended to 5pm? Are there any figures for the numbers of public in the building at this time?*

LO replied that TNA is currently evaluating the results of the trial period for late night opening and is looking at the results from the recent visitor survey and the statistics this produced.

**3. Bulk order changes.**

3.1 DP gave an overview of the new bulk order system which has gone live today, the 16<sup>th</sup> August. Bulk orders relate to a run of documents from one series ordered in advance of a visit. The system has not been reviewed for over 20 years and does not reflect current user research requirements.

3.2 The new process will require three instead of two days' notice, reflecting that many bulk orders are for documents stored off site. The minimum number of documents that can be ordered has been increased to twenty and the maximum number of documents from 30 to 40. Documents can also now be ordered on consecutive days and can be available to order within six weeks of the user's intended visit.

3.3 The manual process has now been automated and orders can be placed on line. This enables orders to be verified and a bulk order summary will be produced on receipt of an order. This will show the first line of the Discovery description for each item ordered.

*3.4 Will it be possible to view past orders from home?*

DP replied that this facility is being worked on. In the meantime you can download and send these from the computers onsite.

*3.5 Why cannot the physical record of a digitised document be ordered?*

DP advised that this is usually for reasons related to preservation; in these cases a valid reason is needed for a user to see the original. This is in accordance with long-standing policy.

#### **4. Open discussion.**

*4.1 When an order is placed for a document it is unclear if it will be provided in the digital or physical version.*

LO advised that Discovery shows this information.

*4.2 Why was there no blog published about the July release of government records?*

LO was unable to confirm in this instance but advised that there was no decision taken to refrain from blogging on the release.

*4.3 Is any work underway to make the search facility more user friendly? A small discrepancy such as a missing or misplaced letter in the search text can result in a null result.*

LO advised that a constant process of improvement is undertaken at TNA to improve the user experience using volunteers to test TNA systems. This includes 'guerrilla testing' where members of the public in the reading room are approached to participate. Calls for volunteers are placed both on the TNA newsletter and website. There are various techniques to employ the use of wildcards in searches and these are set out on the website.

*4.4 There are increasing issues with clarity on TNA's approach to cataloguing offensive terms. Similarly, there are problems with taxonomy for example with the FCO files for the Caribbean being indexed under the Indian sub-continent.*

LO was unable to speak to the technicalities of specific cataloguing cases but referred to his earlier answer on the use of wild cards for 'fuzzy' searches to capture records.

*4.5 The release of further AIR 81 files is overdue by 2 years; these should have been released after 75 years. Are there any plans to catch up on this delay?*

LO advised that the release of records is controlled by the transferring department, in the case the Ministry of Defence (MoD). The MoD has published a report on their transfer progress on the gov.uk website. If there are further queries, these should be raised with MoD.

*4.6 All the cameras have been removed from the reading room, users cannot print and it is difficult to email files from the TNA to personal email; are there any alternative for users who struggle with the reduced facilities?*

LO referred to the minutes of the user forum last November which outlined the reasons for the changes to the services. Users may order copies over the counter on payment of the relevant fee. DP added that instructions relating to a simplified process for emailing documents were reissued in May; TNA staff can provide assistance and further information on this if needed. It is also possible for users to download files from home.

*4.7 Is there any update on progress with the release of MoD WW2 service records?*

LO advised that no update has been received by TNA from the MoD. Users may still apply to MoD for access to WW2 service records.

*4.8 Was a press release prepared for the government files released in July?*

LO advised that no TNA press release is produced in conjunction with the six monthly release of Cabinet papers. On these occasions TNA hosts a two day event where accredited journalists are invited to examine the papers in advance of the release date and compile articles. These articles are then embargoed until the release date.

*4.9 Previously, TNA published a list of the released documents in the reading room for the public's information – what has replaced it?*

LO advised that Discovery has a function to enable users to search documents by release date.

*4.10 With respect to AIR 81, would it be possible to flag those files not yet released by using the due release dates as reporting criteria?*

LO advised that there is no functionality for this on Discovery. Control over the release of these files and their reporting rests with MoD.

*4.11 Are TNA monitoring the situation with respect to Northamptonshire archives?*

LO advised that TNA are aware of the situation and the Archives Sector Development team are monitoring.

*4.12 Are there any proposals for TNA to work in partnership with local libraries to make research material locally?*

LO advised that this is the case now. Users can access digital materials via local library PCs, but libraries do not have the facilities to hold physical documents in the necessary conditions.

**5. Date of next meeting:**

**Thursday 15th November 2018, 12.30-13.45 – Keeper's Session.**

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