

**Users' Group Meeting
April 23, 2010
National Archives
Washington, DC**

1. Increasing the number of pulls – Vern Smith and James Hastings

Weekdays

Pulls on extended hour days were restored when we returned to extended hours. We did not restore the last pull (3:30 p.m.) on days when we close at 5 p.m. because the records would not be delivered until almost closing time. We encourage researchers who are returning the next day to submit pull requests in the late afternoon for pulling early the next morning. See “rolling pulls,” below.

We encourage researchers to submit pull requests after last pull time so they're the first pull of the day next day.

Comment: A1 will not allow, archivists not allowing.

A: We will look into having both buildings do the same procedures.

At A2, mostly because of heavier demand, we begin pulling early in the morning the requests from the night before if someone is here to work on it. If there are a lot of re-files, we might not be able to get ahead. We're always trying to get ahead of requests.

Comment: You used to have pulls every hour max 24/day. We are limited now to 4 requests per pull time/hour. So 16 pulls a day. This is a major difference if requesting a lot of pulls.

A: (Hastings) We're looking hard at reference in both buildings and how to improve service. One of the most important is how many pulls per request. You'll be involved in the resolution. We're doing the best we can with the current setup

Comment: The 3:30 p.m. on Monday and Tuesday are important to keep because it is the only way to have it the next day and ready first thing. The busy season is coming (spring/summer) for out-of-towners, the 3:30 p.m. as the last time is hard for those people. Can you add another pull at 6pm?

A: It is part of the study.

Q: If the records I request in the afternoon are not what I wanted, then it is wasted time. I can't have records that day and then have to wait until the next day.

A: It depends on the issue. If there is a mistake, then we should address it immediately if it turns out to not be what you requested. If it is not what you expected/needed, then that is a different question.

Comment: This is O.K. at A2. At A1, it is different.

A: We guarantee to make both buildings consistent. We're doing the analysis this summer.

Rolling pulls

We do continuous pulling throughout the day, particularly in Archives II. Some staff begin pulling well before we open and others continue after we close. We use pull times to provide information to researchers as to when they can expect to receive the records; to provide statistics on achieving on-time delivery (within 1 hour of pull time 94% of the time); and to manage the volume of pulls.

Saturdays

We are planning a pilot for researchers in Archives I. We will begin the pilot this summer. We will do the pilot in Archives I because the records here are better described than those in Archives II. Our concern is that researchers need archival support and guidance to complete pull slips and to provide this support will require significant staffing. In our pilot, we will see if we can provide Saturday pull service without the archival support. This will provide very useful information as we consider extending this service. We need your help to try out as pilot with pensions and service.

There is concern that if we advertise this service and then cannot help those who come on Saturday expecting archival assistance that this will actually be a disservice to those who do not know what they are looking for. We must approach it carefully. We will do a pilot on Saturdays and then see how it works. We may get more complaints when we provide pull service on Saturday without archival assistance than we do currently by not providing Saturday pulls. We may limit our pilot to pulling pension and service records only on Saturdays because we do have research room staff members here on Saturday who can help researchers use the index for these records.

Q: Will you include Bounty land records also?

A: This may be possible. This is why we need your help.

Comment: I suggest asking researchers to write up hints for the staff and researchers to use. I've found that not all techs know enough about the records to pull. Also, researchers could benefit from using guides from experienced researchers.

A: That would be great and encouraged! New researchers could certainly benefit from your experience Researchers often know more about our records that we do.

Q: Can you rotate the archival staff to try to have knowledgeable people here to help researchers on Saturday?

A: We've tried asking for volunteers, but you can't force someone to work different times. We're looking into it and will start over the summer while working with the Union. We need to work with the schedules of the staff. Some will be archivists and specialists. It may be necessary for us to pay staff overtime.

Q: Are you counting Saturdays as one of the three days that records can be held for a researcher?

A: Yes

Comment: Please eliminate Saturdays.

A: The 3-day count includes Saturdays. However, if you tell staff at the desk that you need a 5-day hold they will automatically do it.

Q: Can I call it in?

A: Yes, call it in at 301-837-2005 for Archives 2. Make sure to stay on the line long enough for the staff member to confirm that they found your pink slips.

Q: Can you have the phone number be more prominently featured on the website for the research rooms? Please make this phone number easier to find.

A: Yes.

Q: Can we get new carts at A1?

A: Yes, we're working on it.

2. List of microfilm publications or original records digitized by Ancestry and Footnote – Mary Rephlo

The list is live on archives.gov (<http://archives.gov/digitization/digitized-by-partners.html>) and will link researchers directly to the digital version of the microfilm publication or original records on the partner website. This was an excellent suggestion from researchers and we're glad that it's up and running.

It is shown in microfilm publication order, but you can sort differently, such as in record group order, by clicking on each column heading.

Q: Why show a record group is complete on Ancestry or Footnote when it is not?

A: This means the partner indicates that they have mounted the entire title on their website.

Comment: No, 70% only.

A: Let Mary know where "complete" is not accurate. We know of an example of a Navy records microfilm publication where Ancestry did not mount certain images because scans were so dark as to be illegible (because certain cards are blue). We are working with Ancestry on that and other problems.

You can add correct indexing information directly on both partner websites when indexing information is incorrect. If an image is missing, or something is amiss in the browse structure, then let us know.

Comment: I'm talking about huge portion not complete, not typos.

A: Let us know specifics when you find such problems.

Comment: It is frustrating.

A: Let us know so we can correct with Ancestry and Footnote. They are responsive. You need to let us know. You can report it to anyone, and we will let Mary Rephlo know.

Q: Can the contact person's name be placed on the website?

A: Yes, the Archivist has asked us to put out FAQs on the website. This is what Jim Hastings is doing next week.

We have asked partners if they can set up a system so we can review any comments relating to NARA images that they receive through the feedback mechanisms. Both are investigating whether that is possible and will let us know.

Q: Can your staff working with the public be sure to inform researchers that some microfilm records are not always online? When a researcher cannot find something they often go away without looking at the microfilm. They should be directed to look at the microfilm if they did not find what they were looking for online.

A: Good point. We will make sure to let staff know that researchers should also check the microfilm and not just the computer.

Comment: Index problems have big gaps on Ancestry.

A: Mary Rephlo will bring any problems to Ancestry. Again, we are relying on you to give us specifics.

Regarding the archives.gov page on records digitized by partners, note that Ancestry sometimes separates a single microfilm publication into two titles. You can see examples by clicking on the two different links for both A1154 and M432. Ancestry does this based on user studies.

3. Corrections to partner websites – Mary Rephlo

Since we met last month researchers have brought to our attention three errors affecting the browse structure of titles on Ancestry. We contacted Ancestry, and they have corrected two of the errors and will complete the third within the 30-day period allowed.

Also, we have been in touch with Footnote and Ancestry, as well as our lab, in response to the concern expressed last month that some microfilm rolls were not digitized. We have all put in place now the safeguards necessary to ensure that no rolls are skipped.

4. Updates – Jim Hastings

Wi-Fi installation

We now have the funding for installation of Wi-Fi in the public areas of Archives I and Archives II. The Foundation for the National Archives made a significant contribution to enable this long-anticipated upgrade in service for researchers. Our project manager said that it will take approximately six months to get the system up and running. We will start in public areas including the A1 and A2 research rooms. We're thrilled!

Reconfiguration in the National Archives Building

We anticipate having the funding to proceed in the fall of this year. We will begin purchasing new microfilm equipment this year as funds become available and will continue to purchase the equipment in FY 2011.

Serial Set purchase

The purchase request is in process. We expect to have the digital set available within 2-3 months. Access will be in Archives I and Archives II, and maybe someday nationwide although it is more expensive to do nationwide.

Q: Will you leave the volumes accessible until scanned?

A: Yes, we will continue to have them available in the Library.

5. Requesting records online – Ann Cummings and Vern Smith

Holdings Management System

We are engaged in a BPR to determine how we can provide an online reference tool that could include researchers' creating pull slips electronically. This will be a complicated process because it will require having many electronic systems talk to each other. We believe it will be a couple of years before we have this capability.

HMS is just one system that is currently being rolled out both A1 and A2. It is replacing MLR. Any new system interface that will be developed will need to link data from HMS, ARC, and other resources to create electronic pull slips.

Processing initiative

Having the technology in place for electronic pull slips will only help researchers if the records are described sufficiently to enable very specific requests. Many of our records, particularly in Archives II, are not yet described at this level. We're engaged in a processing initiative to process all of our records and have online descriptions of them available by 2016. We're making steady progress at 10% per year. Once we have the technology for electronic pull slips we may be able to introduce it incrementally, record group by record group, without waiting for 100% completion of processing.

We are currently in a re-engineering study. We are examining online research tools for customer service with all the different resources to create an electronic pull slip. We're looking into how quickly and effectively a pull slip can be done electronically. We need to look into the interface to bring it together. There are many factors that affect it. We're looking at something that takes a few years.

One of the issues is a lot of collections are not processed and described. There is no electronic description yet – it is all paper. There needs to be an electronic version in the Holdings Management System, such as file units or box lists. This is crucial to success. For users not onsite, this system needs to be user friendly. We must have the information electronically available so it is a success.

Q: Will you wait until all are ready?

A: We may be able to have electronic pulls slips for specific records that are well-described online. We could introduce electronic pull slips incrementally this way. We still have a ways to go yet though.

Comment: This would be a big step if you just allowed researchers who are onsite to submit pull slips electronically.

A: It would have to be a phased approach done in accordance with the recommendations of the BPR. The first part of the BPR is coming to a close and we're now looking at the public portion. We have to be able to deliver on what we said it can do. Unlike many older National Archives, we do not have the level of item control that would enable electronic pull slips. Massive amounts of information need to be created before we can take the next step.

Pension and service records might be phased in. It will be a long time before A2 – at least 10 years.

Q: Are you including staff in the plans?

A: Yes

Q: Who is doing the BPR?

A: An outside group who has been in the research rooms and talked to researchers and archivists. They have been doing this since late last fall and just finished the first phase. It takes several weeks in both buildings.

Q: Is the report available to all?

A: (Hastings) Yes, it should be available in the interest of open government.

(Smith) We're pushing for a system that is as user-friendly as possible. It is in everyone's interest to make it as easy as possible.

Comments by Archivist of the United States

Open Government Initiative (see: <http://www.archives.gov/open/index.html>) and Citizen Archivists (see <http://blogs.archives.gov/aotus/>)

We are looking for ways to engage and how to go about fulfilling our commitments to the user community. Let me remind you that we have the President's executive order requiring open government. It is about Transparency, Participation, and Collaboration. Every agency must make a plan.

As the Archivist and as the new guy, it is important to do analyses of how the archives could do work in a different way; how to develop better relations and better ways to engage staff. We have internal and external initiatives centered on that. Pam Wright, Miriam Nisbet and Paul Wester are most involved with other agencies for NARA.

Some others initiatives, like social media, are starting dialog with the user community. Pam is working with others on this. We like how many are using NARAtions and my blog. It is a way to engage our users. We describe this as citizen archivist. Those who use the collections -- you know the collections more than we do. A serious researcher has better information because they use it more. When they leave the institution, so does the information. We are creating a way for researchers to leave that information behind -- to help us. And help the next person.

Pamela Wright leads the discussion.

I heard the discussion earlier about this topic, and we'd like to capture this type of information on a wiki.

[Handout on wiki meetings provided]

For 10 years I was a researcher here before becoming an Archivist. I know RG75 and wrote files, lists, and notations. I would have loved to leave that behind for someone.

We'd like to have a meeting for a central location for leaving that information -- like a week in May. If you have time and interest, we would love to include you.

Comment: I suggest a wiki template -- keep it simple. For instance, I note records by group. When I've found records in interesting places I told an archivist. I suggest making it under key words, or something like that. Don't make it too complicated. Maybe just ships, object name, title name. And make it a way for us to send it to you. Institutional memory is valuable to other users and archivists. This is a great approach. This relationship is needed.

Comment: Researchers should use Citizen Archivist, but also the staff should use it -- like a retired archivist should be contributing to the wiki.

Comment: In the meanwhile, ask archivists who they think are the savviest researchers and then make them a new type of volunteer.

Q: I'm concerned with the researcher process, with online catalogs, etc, and now another resource. How are you going to integrate?

A: Wiki only be useful if it links back to other resources.

Comment: Make it like the White House comments, would that be helpful.

A: Yes, that would be helpful. We are redesigning the NARA web page. Now we have a weedy garden and we love the authoritative source for a one-stop-shop. We always want to place it in one area.

Comment: One authoritative location for searching is the key.

A: We are looking at search engines. We're looking at a federated search. This pulls all of it up and you still have look it, but only in one search.

Comment: I recommend a due diligence research, get current archivist top five or six topics for a research topic and then a second tier. This helps with a table. We can then provide a list of places to look. Researchers can look and then add if in weird places. This helps find hidden records like what I found about Vietnam. It helps archivists to know and then maybe place back where the records belongs.

A: Social media is quick to add and fix. We can launch relatively soon. Big projects require legal and technical issues before getting started; we have already done this part with the wiki. We want your input before getting started. We could use your input with meetings in May. We want to sit down and initially populate it with real experts and continue to meet with you and grow online.

[Handout on Open Government Plan provided]

Q: There is a lot of talk about digitizing stuff, but never a tie to explaining that we only do one tenth of one percent of what we've got. What are we really trying to accomplish? We never say this is just a teaser of what is really available. It is hard to get people to get in.

A: Great point. A person coming in versus using online resources has changed. Many more are using online and not coming in. This is a mistake. 99 percent is not online. Well over 50 percent of our microfilm is online. We need people to know about the online, but there is an awful lot not online. There is a world of information in the buildings for people to use.

Comment: NARA needs a national campaign explaining what is not online.

Archivist: It would be nice to have list of what is available. This is a huge problem. Every new generation thinks if it is not online, then it does not exist.

Comment: I love the video by the Archivist on Open Government. Do the same through the stacks for a visual of how many records there are. Do work with the Ad Council and get the information out there. Show them historical things available via commercials.

Comment: I love the new blog, but it needs to be more active. I've bookmarked for getting new things. I get most from the comments. I was stunned at only four new items in the blog. It needs to be more active with bloggers.

A: (Wright) I agree. This summer we will have more bloggers.

Q: RSS feeds?

A: Yes

Comment: Having to do an RSS feed for each category is cumbersome. Comments should not feed the blog. The RSS feed is extremely helpful.

Comment: The Oversight Committee report and the morale in the building affects our experience here. We want everyone to be happy. I'm concerned how this will be improved.

Archivist: Any staff member will tell you that I'm obsessed with staff morale. I am embarrassed that we are second from the bottom. I've done a video and voicemail message encouraging people to participate in the survey and 82% did it. I need it for baseline to start a campaign of the work environment. I'm dead serious about improving. I can't do anything else until this problem is resolved.

Comment: With few exceptions, I am very fond of the staff. I'm concerned about them. I did notice that everyone's morale has jumped up.

Archivist: I wandered around listening to staff. It is an extraordinary staff and I'm glad to be here.

Comment: Regarding the 12-page report. I as a researcher, I'm concerned about protocol. There is good protocol through security coming in, but leaving the building it is not checked. It should be staff as well as researchers. Protocol should be changed.

Archivist: This is on the radar screen. I expect my bag to be checked whenever I leave.

Comments: Other places check bags. The lobby area is a problem. I have to stay out there until 9am. For instance, like in the Holocaust museum, I worry about shooting, and then all those bodies are in the way. We should move out of the way before 9am for security

A: (Hastings) Security is aware and looking into it. We'll follow up.

Archivist: The bathroom issue has also already been raised about waiting. You should be able to use the bathroom.

Comment: The 2nd floor bathrooms not available. With older researchers, there can be an accident.

A: The resolution is in part with the key cards. They need to keep researchers on other side of stacks.

Comment: We need unisex bathrooms.

The next meeting is May 21, at 1pm, at Archives II (room TBD).