

## ScotlandsPeople User Group

### Third Meeting

7pm 17 September 2003

CBC House, Edinburgh

**Present:** Marie Dougan  
Jan Gow  
Bruce Irving  
Andy Keogh  
John McCurdie  
George Maxwell  
Alan Stewart  
David Webster  
Sue McBeth (by teleconference)  
Scott Buie (by teleconference)  
Alison Wallace (Scotland On Line)  
Deryck Mitchelson (Scotland On Line)  
Richard Callison (Scotland On Line)  
Paul Parr (Deputy Registrar General, GROS) (Chair)  
Martin Tyson (Departmental Record Officer, GROS) (Secretary)

1. No **Apologies** were received.

#### 2. **Minutes of last meeting**

These had been circulated, approved and published after the last meeting, and members had no further points of accuracy.

#### 3. **Matters arising**

Action points would be dealt with under the appropriate agenda points.

#### 4. **Membership**

Paul Parr welcomed the 2 new members. Alison Wallace confirmed that credits for testing etc and other arrangements were being put in place.

#### 5. **User Group Position Paper**

Paul thanked members for the paper (link to be put in), which set out members' concerns regarding the testing and launch of the recent site upgrade. The meeting discussed the points raised (topics are as per the paper):

*Test Timescale* – it was generally agreed that the timescale originally specified for the Group to test the upgrades had been unrealistically tight. Paul also felt that there had been insufficiently clear definition of what precisely members were expected to test, what the testing was expected to achieve, and what feedback was sought. He felt that for future testing, there ought to be a clear statement of intent and expectations, which should be cleared with members, as should a test timescale. This was agreed, though members felt this process

should not be too formalised an agreement. Another problem was that SOL had possibly not been disciplined enough in responding to issues raised by testing. Issues had been fixed piecemeal, which led to further bugs. In future, all issues raised in testing would be logged on an issues log available to members, but no action taken on any until after the end of the agreed test timescale.

Some members also felt that they had been asked to test the upgrades before they were really fit to be tested. There were some differences of opinion about this, but there was general agreement that upgrades needed to be at a reasonably final stage before testing commenced.

David Webster and others felt that there had been little response when issues were raised with SOL. Richard Callison responded that all calls had been logged, but not all had been communicated back as well as they might have been. He felt the site had not really been ready to be tested, and SOL had not been as focussed as they might have been, due to conflicting priorities.

Paul emphasised that reorganisation on the part of SOL emphasised their commitment to the project, with Richard, their CEO, now closely involved with the project and with the User Group.

*Communications* – Paul acknowledged that communications with the user group and users in general had not been ideal. He undertook that any contact from user group members would be responded to. He also felt that there should be a more proactive policy towards putting on the site statements regarding problems experienced or upcoming. David felt that one example where an announcement had been made was regarding the deletion of the census next/previous search, but this had been too bald, with no indication of when the functionality might be restored.

**Action:** Deryck undertook to contact the User Group with details of the functionality and schedule for restoration

It was agreed that Martin Tyson for GROS and Alison Wallace for SOL would be sole contacts for communications to and from the User Group. Andy Keogh felt there was confusion about the status of queries on the Discussion Group, and the use of contact forms. SOL confirmed that they would respond to queries raised with them via the contact form, but that they would not generally become involved with Discussion Group threads. Usage of the Discussion Group was discussed – only a very small minority of site users ever posts, though it was pointed out that their concerns might be fairly widely representative. In answer to a question from Alan Stewart, Martin felt there were some risks to User group members answering questions on the Discussion Group, especially if this came to be seen as their answering on behalf of SOL/GROS. David felt the Discussion group was useful for allowing User group members to pick up on situations on site to test.

Paul felt the point in the position paper regarding FAQ's should be addressed. Richard said that there was an FAQ section on the site, but it needed to be better sited and run. **Action:** SOL to act on this

Improve Testing – David referred to the point about development of testing scripts. Richard felt he had not made himself clear in his statement. In fact, testing scripts had been in place since well before the original launch of the site, but were constantly under further development. SOL uses the commercially available eValid software. They were also investing considerably in additional testing hardware to allow the site’s functionality to be fully replicated under test. The User Group accepted that SOL would continue to do their own testing, and the need for consultancy was not therefore appropriate.

*Compliance* - Deryck stated that it would be difficult to get the whole site compliant to W3C Priority 1, because of the high proportion of graphics. At the moment, front pages, help pages etc were compliant to priority 1, and the aim was to bring these up to Priority 2, but it would be difficult to do much more. Andy Keogh suggested that with compliance issues becoming more crucial, there was a need for everything on the site to be textualised, with complete transcriptions of records. This was particularly urgent for .gov sites. Martin stressed the huge resource implications of this.

**Action:** Richard promised to provide a paper dealing with compliance issues on the site.

David Webster returned to the issue of communication. There had been no response to queries regarding extending the date range on death searches. Alan Stewart felt this should be +/- any date range as on the PRO 1901 census site. Deryck said that while this was basically easy to do, there was a risk of placing an unacceptable load on the server. However, it was always planned to expand the date ranges from the present +/- one year. David felt this needed to be explained better.

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After some discussion of the need for better soundex searching, Alan commented that it was more crucial for searches to give the correct result first time, given that they were charged for on the site. Unless something could be done about the quality of searching, then the site should go over to free searching. Andy felt that this was a consensus among users and would lead to more business and revenue. Paul stressed that this would be a fundamental change in business model. Richard stressed that there was a commercial imperative on SOL. Jan felt that the onus was therefore on the site to make the search engine more efficient. David felt that users’ opinions should be sought. While there had been a questionnaire to users, Sue McBeth felt this had been too onerous. It was agreed that the User group’s views should be sought regarding future surveys.

## 6. Upgrade Paper

Martin welcomed the paper, which made a number of extremely constructive suggestions.

*Direct download (2.1)*

Deryck was not aware of major problems with the direct download facility. Andy had noted a lot of comments on the Discussion Group. The Direct Download pop-up should be no more of a problem than any other on the site. Marie Dougan felt there needed to be more explicit warnings to Mac users. Alison mentioned that the Direct download option had been a response to Mac users' views. The opportunity to test the image viewer was not necessarily taken up by users. Andy stressed that Direct Download for PCs was still controlled by JavaScript and database. Alan Stewart felt that SOL should monitor the technical strands of the Discussion Group on these questions. Richard said that SOL would solicit views on direct download and follow-up. David suggested that those persistently posting about such problems should be asked to post a contact form.

*Mac image downloads (2.2)*

Alison was aware of only one outstanding item regarding Mac downloads

*Pc image downloads (2.3)*

Alison was not aware of any outstanding items regarding Pc downloads

*Compliance (2.4)*

Dealt with under Position Paper above

*Dual screens (2.5)*

SOL felt this would be possible for results and other pages, but not for images. However, after discussion amongst the group it emerged that dual screen viewing was possible at the moment by simply opening up a new window in the browser.

*GROS references (2.6)*

SOL felt this should be possible.

*Restoration of previous/next functionality on census pages (2.7)*

This would be done as soon as possible

*Link to census header page (2.8)*

There was general agreement that this was desirable.

*Page numbers (2.9)*

This had been fixed and implemented on the site a couple of days before the meeting.

*1881 census (2.10)*

It was pointed out that the 1881 results are not in fact images. Paul felt that while a print facility might be desirable, this might not be a particularly high priority, given that real 1881 images would be available next year. In any case, it was possible to print out a results page via a screen capture.

*Browsing births, marriages and deaths (2.11)*

Martin explained that there was no browsing of statutory registers of births, marriages and deaths whether on the site, at New Register House, or in

registration offices. This was because the 1965 Registration (Scotland) Act only specified access to individual records via name index, and made no provision for access to records in bulk. Any change to this would have privacy implications, especially for more modern records. GROS had no plans to make such a change at the moment. However, they were about to consult on a draft Registration Bill, and that might be an opportunity if anyone wanted to suggest such a change.

#### *Organisation of timeline (2.12)*

This should be possible – though SOL and GROS wondered how widespread the use of this facility was.

#### *User's images on the discussion group (2.13)*

David clarified the purpose of this, which was to enable users to help each other with difficulties with handwriting and interpreting entries. There was some concern that this could be abused. After some discussion, it was established that the same outcome would be achieved by simply adding links to images.

Looking at the items above, Martin suggested that it would be helpful if Group members could list the items which had been identified as possible in order of priority, so as to enable SOL/GROS to prioritise work on them.

**Action:** members to suggest upgrade priorities

#### *Payment before searching (3.1)*

Some aspects of this had already been discussed. Both alternatives involved a major shift in the business model for the site and GROS and SOL were not convinced that the suggested improvement in revenue would result.

#### *Search time (3.2)*

There had already been one extension to search session time on the site. Paul was concerned that an extension would affect revenue on the site. The prospect of going back to the parliament with another Statutory Instrument so closely following the previous one was not attractive. Alan Stewart questioned the legitimacy of taking the revenue into account – ScotlandsPeople should not be making money out of people having made unsuccessful searches owing to lack of functionality on the site. Sue McBeth on the other hand felt that the earlier concession on session times should not have been made.

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#### *Soundex on surnames (4.1)*

Deryck explained that there had been problems with the original Oracle soundex. It had therefore been coded to full ANSI standard. For Statutory searches, users should have received standard results (ie the same as for any other database using ANSI soundex) since 1 August. Jan Gow raised problems with searching Mcs and Macs

**Action:** Jan and Sue to notify Deryck of specific issues for him to action

#### *Soundex on forenames (4.2)*

It was generally agreed that some better functionality for forename searches was desirable

**Action:** Martin to look into possibility of a forename thesaurus, with possible input from Sue

**Action:** SOL to implement note as described for tickbox.

*Include in results death ages not indexed (4.3)*

This had been on the site originally, but had been removed after user comments that it was misleading. It was suggested that, pending completion of ages input, the search option should be restored as an option for users.

*Mother's maiden surname (4.4)*

As mentioned, this depended on resources for input.

*Death searches on married women (4.5)*

Members felt that there should be something similar to the 'Cross search' on maiden and married names available at New Register House on the site, even if the dataset on which it depended was imperfect. This was a high priority, and Paul undertook that it would be considered in the light of the business case for all the suggested upgrades.

**Action:** SOL/GROS to consider implementing 'cross search'

*Occupation on census searches (4.6)*

There was general agreement that this would be good to have, but information gained during the tendering for the 1841-1871 census indexing (see below) suggested that the cost of adding this to those and existing indexes would be prohibitive, given that occupation was one of the largest fields in terms of keystrokes. There was considerable debate among members as to whether the best use of GROS resources was to index records that were currently unindexed, or partially indexed, or to add extra information to existing indexes. Martin felt that there were legitimate arguments for both viewpoints, but the decision GROS had taken was to give accessibility, however basic, to the maximum number of records.

*OPR death records (4.7)*

Bruce Irving reported that there was mixed progress with the National Burial Indexing project. GROS would have copies of what indexes had been completed.

*Non-conformist records (4.8)*

Martin agreed that availability of such records on the web would be highly desirable, but stressed that this was a matter for the National Archives of Scotland. They did have an ongoing imaging and indexing programme, and would no doubt be considering these records, among others.

## 6. Imaging and Indexing Progress

*Problem images* – Martin reported that there had been no major progress on this front. Misindexed, poor and missing images were being reprocessed by GROS as and when they were reported.

*Progress with OPRs and other records* – imaging of the OPRs was continuing satisfactorily. However, the task of linking the completed images with the existing index entries was raising a number of issues. The main one was that a large number of index entries did not carry the number corresponding to the original microfilm frame from which the images were produced. This problem varied unpredictably between parishes and counties, and was making it difficult to achieve a fully functioning solution for these records. In some areas, there were frame numbers for a very high proportion of entries, in others the percentage present was very low. GROS were suggesting that when they had a suitable area ready that it should be offered to the User Group for testing, to see whether an acceptable product was achievable. There was much debate about this, with Alan Stewart questioning very strongly whether this would be worth testing at all. **Other members felt that it might be easier to make a decision if they knew what the proportion of problem entries was.**

**Action:** Paul to supply figures for problem entries.

*Census indexing* – Martin reported that, as had been mentioned, GROS were in the process of letting a contract to create name indexes for the 1841-1871 census returns. The indexes would be in the same ‘thin index’ format as the existing 1891 and 1901 censuses. Tenderers had been asked to offer on the basis of completing the work by end March 2004. The index entries would then be linked to the already completed images. Richard Callison raised the question of possible ‘browse’ access to the images, pending completion of the indexes. He and Martin undertook to look at this. Bruce Irving was concerned at the prospect of ‘reinventing the wheel’ bearing in mind that much of the 1851 census and some of the 1841 census had already been indexed by Scottish Association of Family History Society members and others. Why were GROS not using the copy indexes that had been supplied to them by societies? Martin responded that GROS had hoped to do so, but had encountered problems in integrating the various index formats used over the years by societies with the format they were using, and it was felt to be more efficient to create thin indexes which would then be checked against the societies’ indexes (where they existed) during the quality assurance process. There were also intellectual property issues. Bruce also queried the quality of what would be produced compared with the societies’ indexes. Martin stressed that the quality would be at least as good as the 1891 and 1901 indexes, which were generally felt to be satisfactory. Bruce felt that the issues needed to be further explored.

**Action:** Martin to attend SAFHS meeting, 4 October.

## 8. Charging Structure

*Bulk discount access model* - Paul outlined work being done, towards providing bulk access to the site via institutions, which was where the main progress was being made. GROS had had a very productive meeting with the Scottish Library and Information Council (SLIC) regarding a national licence for accessing ScotlandsPeople through People’s Network terminals in public libraries, and would be taking this forward with them. Marie Dougan also stressed that the Communities Channel should be explored as another mechanism for giving wider access to the site. Paul undertook to look at this.

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*Time limits* – in answer to questions from members, Paul said that the question of session time limits would be kept under review.

#### **9. Any Other Business**

Members asked for additional information about the History Channel link with Scotlands People, recently publicised in the media. Richard Callison confirmed that the link was with the channel's .co.uk site, rather than the .com site, but they did hope it would improve the site's footprint in the US.

The next meeting was set for February, but an exact date was not decided.