



CLOSING DATE FOR SUBMISSIONS – 5PM (UK TIME), 1 NOVEMBER 2021
CLARIFICATION QUESTIONS AND RESPONSES

The National Archives has received a number of clarification questions relating to this opportunity. Those questions, and their associated responses, can be found below.

Q1: Has a series of discovery etc workshops been completed. If so, please could the findings be shared. If not, do you see this as part of the work to be done?

A1: No, we see this as part of the work.

Q2: If workshops are part of the requirement, please advise if TNA will provide user participants or whether budget/resource needs to be put aside to recruit participation.

A2: We thought the participants will be users from the partner organisations, but if you feel the project would be beneficial please allocate for recruitment in the bid.

Q3: The brief implies a leaning towards inclusivity through such phrases as "take an iterative, agile and inclusive user-centred approach" / "A prototype that will allow a more diverse Discovery" / that represent a diversity of different stories." Is this a correct interpretation and if so, do you wish the research to major on a diverse audience?

A3: Yes, we want to create a way that records can be found/linked by the content irrespective of where the record is held physically, we want the prototype to be a user friendly way of finding/seeing/linking these records e.g for a non-experienced digital archive user.

Q4: Please can you provide more information on "Manage Your Collections"

A4: Please find attached a link explaining MYC

<https://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/manage-your-collections-in-discovery/>

Q5: A quick review of the Discovery service indicates that searches lead to a number of commercial, 3rd party and gateway'd partners. Is there any desire to give free/limited access to your users when accessing via Discovery?

A5: The prototype will focus on a sample of records in Manage Your Collections part of Discovery, that are content-wise linked to records held by our partners for this project, they will be free to access.

Q6: *Please can you provide more information (given 5. above) on what is required under this line: "Creation and storage of prototype query-based taxonomy for aspects of Black history based on stakeholder input" We're not clear on the creation / storage of taxonomy....*

A6: Taxonomy terms at The National Archives consist of a label (e.g. 'Performing arts') and a set of constituent query terms (with some Boolean logic) to return results on that subject (e.g. dance AND theatre AND actor AND actress AND music...etc.). You can see results generated by such a query at

https://discovery.nationalarchives.gov.uk/results/r? tsj=C10078& hb=tna& q=*

These terms are currently used primarily for result filtering. The prototype system will need to store new and expanded terms like this (perhaps using SKOS or some other relevant data standard) and deploy them as part of API queries. This is the way we propose to produce our manageable, subject-specific slices of the huge quantity of data within Discovery.

Q7: *Our understanding of the tender is that the requirement is a search tool – could more information be provided on **the storage** of metadata requirements: **3.1.d: a service that will store additional contextual metadata***

A7: This will need to be fully discussed with partners as part of the design process. But likely examples are: extra keywords, additional text, links and calling/caching content from some external websites or services, for example to provide a digital image of a document published somewhere else.

We are entirely open to proposals of the best method to store this additional metadata.

Q8: *In relation to this how do you anticipate metadata would be created?*

A8: The partner organisations will write/collate this additional content. Since this is a prototype we can collect it in any format that suits. A fully realised system would likely need a simple tool for writing/linking/adding this additional contextual content. That does not seem necessary at this early stage.

Q9: *How is the "Collection Builder" expected to authenticate users, such that only people authorised to use the "Manage Your Collections" service are able to use the tool?*

A9: Authentication is not a priority for this prototype. If needed it can be handled in a simple, lightweight fashion. The number of users is extremely limited.

Q10: *How does the "Manage Your Collections" API support authentication?*

A10: Manage Your Collections does not have an API. This content will be retrieved from the Discovery API.

Q11: *For both the "Manage Your Collections" and "Discovery" API, are there any rate limitations on the calls to the APIs?*

A11: I believe one query / second is considered courteous for the Discovery API but we can discuss this with the relevant team. A faster rate may well be possible.

Q12: *The "Search Tool" would need to perform a regular search query via the "Discovery" API but only against collections that the "Search Tool" has identified as via filtering by theme. Does the Discovery API allow searching across only a subset of collections?*

A12: This is defining requirements ahead of analysis but yes, there are various ways to limit retrieved results. The API sandbox at <https://discovery.nationalarchives.gov.uk/API/sandbox/index#!/> may help explore this.

Q13: *We think you are looking for "Discovery" to be expanded to manage multi-thematic collections - is this correct?*

A13: This is a question best answered at interview. Most collections are about more than one thing and Discovery does recognise this. But Discovery uses a fixed set of terms for categorisation, developed some time ago and for a different purpose. We want to be able to categorise things in new ways. Discovery's UI will also not let you filter by multiple categories. This:

https://discovery.nationalarchives.gov.uk/results/r?_q=protest&_hb=tna&_tsj=C10086&_tsj=C10130 looks like it is saying 'show me all the files containing the keyword 'protest' which are in both the 'public disorder' and the 'caribbean' category (basically boolean AND). In fact the filters are additive (boolean OR) and there is no way to just show the files categorised as being about public disorder in the Caribbean. We would hope to be able to achieve better in a prototype.

This prototype will not necessarily lead to any direct change in Discovery.

Q14: *If so, can you provide information on what Discovery is- as a piece of code/technology? What is enabling the Dublin Core terms into the head section*

A14: Discovery is a system of systems and its underlying architecture is changing as it is being transferred to the cloud. Access to Discovery beyond the public website and API is not part of this project.

The Dublin Core terms in the header of a page such as

<https://discovery.nationalarchives.gov.uk/details/r/C249074> are generic and not of use for this project. We are not in a position to generate and deploy new 'header' terms through Discovery at this time.

Q15: *Are you looking for "People who searched for xxx also searched for yyy" type functionality (2.4 & 3.1.d)*

A15: That is a question that would need to be answered through elicitation and testing with users and partners.

Q16: *What date will the tender be awarded so work can start?*

A16: I would expect us to be in a position to award the tender in week commencing 15th November but this is obviously dependent on various internal processes.

Q17: *Do you expect all design recommendations for the user interface to be included in the MVP?*

A17: No or at least not necessarily at equal levels of fidelity. It may be that features are proposed which we cannot build or which we design/mock up but do not build functionally. We will prioritise our use cases carefully.

Q18: *You've mentioned that the project team had developed a pilot partnership with organisations to test the functionality of the development of the system, could you tell us more about this pilot project and what work has been done so far?*

A18: We have not completed any work so far, we have formed the partnership prior to putting the project out to tender.

Q19: *Who are the users of the 'Discovery' portal and who will we be able to test with?*

A19: The users of discovery are researchers, academic or other wise and the Archives that upload the data on records they hold to the system. The Partner organisations are Archives, they will provide users to test the system with.

Q20: *What would the buyer like to hear under "understanding of sector guidance/standards"? Are there specific standards we need to be aware of/have knowledge of or is this more about Government Data Standards / GDPR / data handling etc? If the latter, would you be happy if we include our appendix of how we handle/secure data?*

A20: The data is for public records that are already in the public domain. The sector guidance for digital records can be found in the following link

<https://www.nationalarchives.gov.uk/information-management/manage-information/>

Q21: *Please can we clarify what is required within the prototype? Will this have partial content data and be used under test scenarios with limited/known personal data? Or, will the prototype be a working product with all the associated requirements around handling and security of personal data. If the latter, we are concerned that the £25k budget is not sufficient.*

A21: The prototype proposed can be design/mock-up it does not need to be fully functional. We will prioritise our use cases carefully in regards to test scenarios.

Q22: *With regards to the scope of the project, sounds like you're asking the following three things?*

1: To design a new UI that improves Discovery's collecting, searching and sharing experience (or is this already done?)

A1: No, this project is about creating a themed hub that sits apart from the discovery but uses discovery API to share data from the manage your collection part of discovery.

2: To build a HTML/JS prototype, using the Discovery API, for user feedback and usability testing

A2: We are interested in how data about records held in discovery from different sources can be pulled through to the prototype hub, we would envisage the next stage being the hub pulling data through from other online repositories (not discovery) example someone would visit the prototype hub – and be looking for info on design of schools 2021 – we would want the prototype to pull data on this topic from discovery, irrespective of its place of deposit and other places of deposit.

3: To test the prototype with users, produce a report of the findings, and iterate the design where necessary.

A3: Yes, to test the prototype with the users within the partnerships that we have formed for this project

Q23: *Would the TNA be open to receive a proposal from us that include two options, i.e Scope A and Scope B with different price points?*

A23: Yes, we would be open to 2 proposals with different price points.