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Hello. And welcome to today's Arches Project Community Call. My name is Lindsey Gant and I'm an Arches project team member with the Getty Conservation Institute. Today, I'm excited to show you all one of the projects I've been working on, which is migrating our existing Google Groups forum to a new platform hosted by Discourse. I will mention right off the bat that our platform Discourse is not to be confused with the platform Discord, which many of you may know as another chat and messaging platform.

During this call, I ask that if you have any questions that you post them in the chat at the bottom of your screen or wait until the end of the presentation. At that time, we will have a Q&A session where I will welcome you to come off mute to ask your questions directly. For the sake of time, I request that your questions relate to the Arches forum transition, or about the Arches community. If you have any questions about the Arches project in general, or about your own Arches implementation, this would be a great opportunity to push your question to the forum or to email the Arches team at contact@archesproject.org.

This call is also being recorded and will be made available to you within the next few days. So to provide you a bit of an overview, during this call I would like to first take the opportunity to discuss some of the goals we have for the Arches Community and then share various ways we would like to increase engagement on the forum. Then I will introduce our guest today, Jono Bacon, who will walk us through the new Discourse forum as well as highlight various features, tips, and tricks for navigating and using the site.

We will then open up for any questions that you may have about the forum transition or the Arches Community. To give a very brief introduction to those new to Arches, Arches is an open source platform developed jointly by the Getty Conservation Institute and the World Monuments Fund for cultural heritage data and asset management. The community around the Arches Project has grown substantially since it kicked off in 2012. Open source development facilitates international collaboration and benefits from contributions from developers around the world.

The images on this slide shows some of the moments where some folks from our international community were able to meet in person to engage in Arches related work. Currently, we have members from governmental or national registries and inventories NGOs, heritage sites, museums, as well as commercial entities.

As an open source project, it is the community that will continue to propel and ensure the longevity of Arches in the years to come. So what exactly is an open source community? It is a highly motivated group from a variety of backgrounds who come together for the common goal of supporting, extending, and sharing the Arches Project.

So Arches as an open source project allows collaborative organizations to pool resources for customization and maintenance, which can free up limited resources for documenting and protecting heritage. It is important for us to create the required infrastructure to increase our membership and to amplify the work of project contributors. In this way, we hope to efficiently organize and inspire groups of remote individuals and to promote the formation of an independent and self-sustaining open source community to foster collaboration and co-creation around the software.

Whether through development, adoption, or advocacy, there are several ways to take part in the Arches Community to amplify our work. Currently, we have several people and groups working to advance the project, such as through software development efforts, contributing to and extending Arches core code, documentation creation and enhancements, resource data modeling efforts, translation work, and internationalization efforts to enhance access and inclusivity to Arches implementers from a variety of international backgrounds.

The open source approach allows anyone to make modifications to Arches to address additional or changing needs. However, we only request that the enhancements or modifications be shared back with the community for the Arches open source community guidelines, which are available on our website.

So one of the best ways to facilitate collaboration, contribution, and communication among all of our community members is to provide a community forum. In 2013, we met this need by creating our first Google Groups forum, and a few years later created a secondary Google Groups for development work. Many of you on this call may be familiar with these forums, or even actively engaged on them. However, due to our expanded community, and our excitement over development work planned for the future of Arches, we have determined that these two forums are outdated and do not allow for the engagement opportunities that we would like to see.

In addition to an outdated forum, I would like to share with you some of our main goals that influence our decision to migrate to a new forum service. So our primary goal is to provide a inclusive varied workspace that is safe and welcoming to people of all backgrounds who are interested in or engaged with Arches work free from judgment or criticism.

We also recognize the sheer amount of knowledge and skill that exists in our community and want to provide a space with modern and simplified tools and functionality that will allow us to share and document some of this knowledge with the rest of the community. We want to encourage conversation, collaboration, and engagement to provide inclusive community support for those interested in using and implementing Arches. We would also like to facilitate development work for the extension and growth of the Arches Project core capabilities and underlying technologies.

In addition to these larger goals we have for the community, there are several ways in which we visualize how this new forum space will increase community engagement. For example, we can share some of our implementation-based work, such as modeling, software development, and

customizing or extending the Arches code. We would also like to facilitate some of that knowledge transfer such as organizing meetings or workshops, digital training sessions for Arches features, and mentorship between those experienced with Arches and those new to the platform or to data management work.

We would also love to see a project dissemination on our forum, such as blog posts to highlight features of your implementation, or to share the process involved in your work, demonstrations, or even documentation for active projects. There are so many interesting ways we might engage with each other as a community. And I would love to see all the creative and innovative ways that we can collaborate as a group.

So after reviewing many different platforms and weighing the pros and cons of each, we decided that that Discourse offered the best function and utility for the growth and expansion of the Arches Community. Primarily, Discourse will allow meaningful and rich conversations through conversation oriented pages. Unlike our current forum, you can easily add images, design, structure your post markdown in HTML. You can easily create thread conversations that are easier to search and navigate.

It will also help us to build and maintain audiences for the Arches Project all on the same platform. Instead of having a separate forum for development work, all of this work will be found on the same platform. It presents the opportunity for other groups to form such as resource modeling groups or documentation writers.

Discourse is an open source project. So it has a community already built around it, implementing and enhancing its features. It also supports a variety of plug-ins so we can adapt our forum to meet our needs over time. The work we do on it will be open so that all of the work we do is visible and accessible to all members of the community. It has built in community-oriented moderation features as defined by levels of engagement on the forum. So while there are many things that I can tell you about Discourse, I think the best option would be to show you these features with the live demonstration.

To do that, we have invited Jono Bacon to join us today. Jono is a leading community and collaboration speaker and author who we have engaged with to provide advice on creating mechanisms for increased engagement in the Arches open source community, as well as for a longer-term open source community governance and resourcing. Jono has a ton of experience working with open source communities on Discourse. So he'll be the best person to walk us through the new forum and to highlight some of the key features, as well as tips for using and interacting with the new forum.

So now I'm going to invite Jono to share his screen so he could show you some of the new Arches Community forum features.

All righty. Thank you, Lindsey. Can everyone hear me OK?

Yeah, you sound great.

All righty. Great. Well welcome, everyone. So it's great to meet you all. I'm going to share my screen. All right. Lindsey, can you see this? Am I broadcasting loud and clear? OK. Wonderful. You're good to go.

All right. So I'm going to be fairly quick and just give you all a quick demo of Discourse. So I worked with a lot of different companies around how to build communities. And Discourse is in my view by far the most comprehensive and flexible platform, and easy to use platform

available. OK. So what I want to show you in this quick demo is how you go and set up your profile, set a profile picture, and add some information, how you go and reply to something in the forum, how you go and kick off new topics, and then I'm going to kind of give you a bit of an overview of how the overall forum works as well.

Now, the design of the forum is relatively simple. This blue box appear that you can see here, you can feel free to ignore this. I'm seeing that because I'm an administrator. But on the left, we've got these categories. These are essentially themed buckets of conversation. And on the right, we've got the latest discussions that are going on in the community. Again, you won't see some of these, such as staff and lounge because these are already visible to me as an administrator.

Now what's wonderful about Discourse is unlike a lot of forums where everything is kind of separated out into the different categories, Discourse shows them all. And they all just keep going and keep going as you load more discussions. OK? So you only have to go to this front page and you'll see everything in there. But if you want to dig into a specific topic such as general Arches discussion, you can click on there, click the logo at the top, you can go ahead to the developer discussion.

And the different discussions from the Google Groups have been imported in thanks to the wonderful work from Jay. OK? Now setting up your profile is really simple. If you go up here to the burger menu-- oh, sorry, actually click on the little J up here. And then I can click on this little person up here and click on Preferences. And this takes you to a page where you can go and set up your different details for your profile. So for example, you're probably going to want to set your profile picture.

Click on this little button. What I'm going to do here is click on Upload to upload my own picture. I'm going to grab my file browser here. This is the one that I actually just took off Twitter. Click on Open and then click on Save Changes. And that's going to add my profile picture here. It'll just take a second to load. And I can also go here to Profile. And I can add some information about me. OK? So I'm just going to say, Jono, I, I am a community strategy consultant for Arches. OK?

So and you can have add location website, all those different pieces, and then click Save. OK? I'm not going to go through all of these different pieces. You're all smart people who'll be able to figure that out. All right? Now the way in which you go and reply to a discussion is very, very simple. OK? So let's say here we've got this discussion here. Introduce yourself. And this is where you kind of go in and share some information about yourself. I'm going to do this really quick. I'll go and update it later on.

But when you're browsing conversations, you can see that you just click on a discussion and you can go and read the different topic messages within it. Now before I reply, the way these conversations work is you can think-- these things are called topics. This is a description of the conversation that's going on. So for example Arches installation with database in a separate server. This is the discussion topic. And then you got all the individual responses, they're called messages, within the topic as well.

So it's pretty standard stuff if you use forums beforehand. But I'm going to go and click on Introduce Yourself. And then I can click on Reply. Now when you click on Reply, it pops up this little editor. And here on the left is where you type in. And on the right, it's going to show you

what it's going to look like to the audience. OK? So I can say, hey, everyone. OK? And it pops up this little thing with some guidance. I'm going to get rid of that.

My name is Jono. I have been helping the Arches team with the move to Discourse, a broader community strategy. So you can do something like that. Now one of the things I like about this editor is you can select text and you can click on bold for example. But for those of you who are a little bit more technical, you can use something called markdown, which is a way of formatting the copy inside of here to make it kind of more interesting and stand out a little bit more. You can see when I selected that to bold, it displays it as bold here on the right.

So this is an editor where you add the information. And then on the right, it's rendered there. OK? And you can do all kinds of different things. So I could say, for example, this is me. OK? I'm going to drag a picture. I'm going back to my File Manager. Where is it? It's over here. And I can just literally drag a file on there. And what that will do is it'll upload it. You can see it appears on the right. And then you can also add, for example, YouTube videos. You can just paste the YouTube video link in. Or you could add Twitter.

If I go to my Twitter account, let me find a-- let me go and find a tweet. OK. And let's say, let's do, let's find a video, this one example. So I can say, I also make lots of videos. Here is a recent one. Put my tweets in there. And then you'll see here it actually renders it and shows the tweet in there. So I can go and click on Reply. And then that's added it into this discussion. OK?

So it's really simple to reply. The other thing you can do when you're reading these conversations is you can click on Likes, you can like things that you're seeing like that and like that. I'm not going to like my own thing. And it's pretty straightforward. Now in terms of how you create a brand new topic, it's again, it's pretty straightforward. So what we'll do is we'll click on New Topic over here, pops up the same editor. And then I can select a category. Now a category, again, is one of those theme discussion areas that we're interested in. So I want to do general Arches discussion.

What are the most powerful features in Arches? Now what Discourse will sometimes do is say, hey, your topic is kind of similar to this. Is it the same one? This thing sometimes lies to you. I tend to ignore that. Hey, everyone. As we promote Arches to a broader audience, what do you all think are the most powerful features we should showcase in our future awareness building of the project? I would love to hear your thoughts. See if we can do an emoji up here. Down that little point down. And then we can see it again rendered here.

And then I'm going to click Create Topic. And now what that's going to do is it's going to create the first message in that topic. And if I go back to the front page, you can see that it appears here in the list. So it's really, really straightforward to use. Now if you've never used something like this before, you're probably going to have a billion different questions. You're more than welcome to post to the forum and ask how it works and if there's something you haven't figured out. You can reach directly out to the team.

I also just want to point out one final thing as well before I move on, is up here if we click in the burger menu, you can click on badges. One of the neat things about Discourse is that as you do new things in the community, you'll get badges awarded to you. So you can see here, for example, I got the autobiographer badge. And it means that I filled out my profile. I got my first emoji badge. I got my first like badge. So I'd like to encourage all of you to actually go and try

and get all of these badges. It's kind of a fun way of collecting these different pieces in the community.

And as you participate more and more in the community, you're actually going to go to these levels as well. We're not going to talk about that so much today. But one of the key things with Discourse is that we can recognize when people are being really active contributing members of the community. So I'd encourage you to go and kind of take a look, and experiment, review some of the different features within Discourse. And I think that's probably enough to just get started with. I'll hand it back to you, Lindsey.

Thank you so much, Jono. That's really informative. And there's a lot of information being thrown at you all today. But we're all working through this as a group and trying to figure out the best features. And so if you have any questions about it, we're also creating some documentation to help figure out how to help introduce you to this forum as well. So I'm going to share my screen here again. One moment here. So earlier this week, you should have received an email upon registration that requested you submit your email so that I can send you a link to create an account on the new Discourse site. I will go ahead and send that email now. So be on the lookout for that. When you've received your email, you will click the link provided, which will take you to the forum where you can then complete the account registration process.

For those of you who did not submit an email, no worries at all. So what you're going to do in order to make an account, you will want to go to community.archesproject.org and click the Sign Up link at the top right of your screen. And once you click that, the screen will pop up. You will notice that we have activated a simple sign on feature for those who wish to log in to the site with our Google or GitHub account. And just so you know, when you're making an account here, we have migrated over a bunch of existing posts from Google Groups.

And so if you have posted there before, it may be beneficial to create your account with the same email address that you use for the Google Groups account. And that's simply in order to sync up your account, your current Discourse account, with the posts already on Google Groups. That's totally up to you. You're welcome to use a new email if you like. But just keep that in mind when you're making your account.

Once you are on the new site, if you drop down the banner, it'll look like this, you will see a few links to help you get out of the forum. We would love for you to sign in on the Introductions thread here in the middle so we can start to get to know our community members little bit better. There's also links to a welcome post and a Getting Started guide. The Getting Started guide will be useful for you to help you get started on the forum.

After this call, you will receive a follow up email with more information about how to get started on our new forum. After checking out the new forum, reviewing categories with my created posts, and perhaps creating or responding with a post of your own, we will also provide you with a link so that you can give some of your own feedback for both improving the discourse sites or ideas for making our community stronger.

So now I'm going to bring Jono back. And we will open up for any questions related to the Arches forum transition or about the Arches Community. And if you have a question, you are welcome to either raise your hand or you can come off mic and just ask your questions. Or you're also welcome to just submit during chat. And we can monitor that as well.

Hey Lindsay, and Jono. It's Dennis.

Hi, Dennis.

Good morning. I have a question probably for Jono. And I'm wondering if you could talk about whether it's possible to reference a GitHub ticket inside of Discourse.

That is a great question, Dennis. I believe that if you take an issue from GitHub and you paste it is a link in there, I believe it will render it in a similar way that it rendered Twitter. But I think it depends on how the forum is configured, whether that kind of lightbox appears. So I'd just test it and see what happens. I'm not entirely sure offhand.

OK, happy to do that. By the way, thanks for the demo. Looked really good.

Awesome. Thank you.

Yeah, and if that's useful for you as well, we can always work on adapting it to make sure that we can include that. So we can work on that and test out the features and see how we can enhance it in that way.

I think it'd be handy to be able to reference tickets in as a seamless way as possible. Because ultimately, whenever there's a bug or a feature request, it ends up getting pushed into a ticket anyway. And it might be nice to be able to reference or point people towards existing tickets if there's a question or if someone has an idea about how to do an enhancement, giving them a quick way to get to our ticketing system from Discourse might be helpful. I don't know.

Yeah, that sounds good.

Hey, this is Adam. I was wondering if you have plans to expand the categories. It looks like right now it's kind of what we have the two separate Google Groups, the general one and then the developer one. But I was thinking if we made one that was like Job Opportunities, or Openings. I'm not sure how-- I guess my question is more general. Do you see the categories expanding to be a little bit more specifically thematic? And how would that process work?

Yeah, that's a really great question, something we definitely tried to figure out as a group to figure out what's the best way for this to go forward. We decided on just a few minor categories at this point as we kick start things just because it's easier to manage. There's a lot of new people to new forum, and trying to figure out how best to find those posts and make things more engaging just in general as we get going. That's the best way to kind of start this process.

We may think about extending the categories as we go. Discourse also allows for subcategories. So if we find that there's a lot of communication happening around a certain topic, we can extend it to have a subcategory that will kind of retain that kind of information as well.

There's also ways of including tags and things like that. There's a lot of different ways in which we can help people find these posts. And I think that's a great idea. And if the use case arises, we can definitely look into that.

And we are planning to have a category that's more for like announcements and general Arches, things like that which will be useful. And definitely if we want to have a place for job

opportunities, I would be definitely open to opening up a new category for things like that as well.

Great. Thanks.

Do you have any other thoughts on that?

No, I think that's plenty good. And maybe you can even change the category of a topic after it's been posted. I'm not sure.

Yes. You can do that. Yep. So once it's already in a category and you decide it doesn't necessarily belong there, we can kind of bulk move them to a different category.

Cool. Great. Yeah. Discourse--

Very briefly, part of the reason why we took this strategy is one of the-- I think it's an intentional element of Discourse is that if you create let's say, 10 different categories, and then often communities will create a lot of categories and then will only be a handful of posts in certain categories, that if you then want to close the category down, you've got to go manually recategorize everything and change the categories on those particular topics.

So what we felt we thought would be easier is just start with a small number of categories, see where the discussion goes, and then add additional subcategories, or additional main categories as we kind of learn more about what people are talking about.

Great. Thank you. Sounds good.

We have a question in the chat here from Shantelle. Jono, there were some pop up help windows coming up when writing in the editor. Can users switch that off? Or is it something that will just keep appearing?

That's a great question. I actually don't know the answer to this. I believe that it's switched on by default. And I'm not sure if you can turn it off on a per user basis. There may be ability to switch it off across the forum. I actually don't know.

There are several-- sorry to interrupt. There are several popup boxes that do show up for basically the introduction phase. So once you're on there and start working through it, you won't see those popups anymore. There is something on there as well called the Arches bot, which you may come into contact when you first make an account. It was originally just called Disco bot. We called it Arches bot for our implementation for obvious reasons. And so but you'll see that to help you kind of guide your way through the process. Those things won't pop up too often, but only whenever you do something for the first time.

So when Jono was creating a post, those things may pop up just to give them some ideas initially. But otherwise, you won't see them again as you continue to work on the platform. There are other banners that may pop in as well. And if you just close them out, you probably won't see them again unless you clear your cache. And then probably you'll see them again after that point.

That's brilliant. Thank you, Lindsey and Jono.

Of course. Thank you for the question. There's a question in the chat. Good approach. Start small and grow category list rather than try to anticipate what members will find useful typically. Yes, that's definitely the approach we wanted to take. And we're hoping to see where we go as a community and how the use case will be going forward.

So one thing I just wanted to say just-- I know we've only got a couple of minutes left. But I've been building communities now for over 20 years. And if there's one thing that I've seen

consistently is that communities are only as good as the level of participation that's occurring. And when you set up a new platform like this, there's kind of a fork in the road. One path is that we have the session today and people don't really show up. And there's not really a lot of conversation going on. And it'll be a bit of a ghost town.

While the other path is that we create this really amazing thriving community with lots of amazing discussion. Everybody here has got so many different ideas, and perspectives, and experiences when it comes to Arches and to kind of bring that out into the open. So to make this community work, I think we're going to be leaning on everybody here. And we'd like to encourage each of you to just go in there every day, even if it's only for five or 10 minutes, and go and respond to people, and go and post new thoughts and questions, and engage.

And sometimes there's a bit of awkward small talk at the beginning of the community. But it's worth it in the long run because once we get the momentum going and everyone feels comfortable with the platform, that's when you get an amazing community. So there's only so much this team can do in terms of setting the conditions. But I think everybody here, we're going to be looking to you to kind of come and help us really kind of get things rolling. So-- and of course, if there's any questions, if there's any concerns, then don't hesitate in reaching out. We have two more questions on chat I would like to quickly get to here. One question is, do you see this as a community principally for developers or for end users of Arches installations, or both? This community-- it's a great question. And it's definitely for anybody who wants to interact with Arches, whether that's through development, whether that's through advocacy, whether that's through just looking at it and just being interested in the work we're doing as a community. It's for anybody who wants to participate in that way.

You're welcome to even not even register for an account if you like. You can just go on and kind of review some of the things that are happening on there and seeing where the work is happening around the world. So it's really for anybody who wants to participate in Arches one way or another, and in whichever way you'd like to participate.

Chris asked, are the Google forums effectively archived at this point? Or will posts there flow into Discourse? Or is there a plan to refresh Discourse at a later point? So right now, we have the process going so that every week or so, we've been migrating posts from Google Groups over to Discourse. And so we had one just yesterday where we took some of the latest posts and pushed it in there. So if you go to the forum, the community forum on Discourse, you will see posts from yesterday on there as well.

And we'll be continuing to do that. Our goal is to launch within the next couple weeks. I'll have more information on that shortly. But once we launch, we will be basically freezing the Google Groups in which nobody will be able to post there anymore. But you will be able to review those posts. But those posts will also be on our new community forum.

Well, thanks Lindsey.

Yeah, of course. Dennis asks, can you please give some guidance on when to use Discourse instead of other channels like Slack? Well, so what we're hoping to do is start moving over to Discourse within the next couple of weeks. So our plan is to launch on June 1. And that June 1 date is in two weeks. So we have some time to kind of test some features, see how it works for our community, see if there's anything we want to adapt, and figure out at which point we will be doing that final migration over to discourse.

And our goal really is to have most communication happening on discourse instead of any other channels. Our goal is to be as open and visible to our work as possible. And so if we can have all that information and communication happening there, that means that everyone in the community can be privy to those conversations. And so basically over the next two weeks, we can start transitioning our own work over to Discourse would be the best option for us and I think for the community going forward. All right. I don't think I see any more questions. Sorry, Lindsey. Could you just following on Dennis's question in relating to Slack, can you just mention the functionality in Discourse to integrate with chat and be able to view those kind of chats in Discourse?

So basically what's going to happen is that there's going to be an email back end once you can start trying to do some of that conversation there. I am unfortunately not entirely certain on how that's going to be implemented at this point. I want to work directly with the developers to make sure that it is useful for them going forward and are able to kind of have that chat engagement there as well.

So keep an eye out for that. And we'll be able to make sure that everyone has the right information going forward. So I would like to take a moment to thank Jono Bacon who unfortunately had to leave this call, but for joining us on this call and providing his guidance to our community. I would also like to thank Jay Pfaffman for his ongoing support to facilitate the transition. Jay, myself, and other members of the Arches team have been working diligently to migrate existing people groups posts over to Discourse so we can ensure we retain any posts that were made throughout the project's extensive history.

We plan to officially launch a community forum on June 1. So it's a great opportunity to check out the new site and to start to familiarize yourself with it. Over the course of the next two weeks, the new Arches forum is available for you to test and experiment with. You will see some posts added to the off-topic category on the forum to help encourage conversation on the site and to help you start to meet others in the community. So make sure you keep an eye out for that. So once again, thank you so much for being here. And we can't wait to see you over on the new forum. Thank you.

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