TOPIC: ALA Strategic Technology Directions: 2014-2017

ACTION REQUESTED: Discussion

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BACKGROUND:

Following the ALA Executive Board retreat in January 2014, staff in ALA’s Information Technology and Telecommunications Services undertook development of an updated ITTS strategy document to highlight how its work fits in with the strategic directions of the Association. This report builds on but is not confined by prior work, notably the ITTS plan documents initially developed in 2000 and subsequently reviewed and amended annually. It details goals and paths that ITTS has been working on - and expects to continue working on – to support the Association’s priorities and goals.

In addition to the technology-focused updates that would be required in any IT plan, the following document seeks to accomplish the following:

- Convey the link between IT requirements and the Association’s structure and policies;
- Describe the mix of insourcing/outsourcing adopted by ITTS to meet the challenges of a rapidly-changing IT environment within the ALA’s resource constraints;
- Provide some context for how priorities are implemented;
- Show the relationship between current shifts in ITTS and changes in the broader Association, ranging from organizational streamlining and simplification to new approaches to advocacy and communications.
ALA STRATEGIC TECHNOLOGY DIRECTIONS: 2014-2017

Prepared by ALA ITTS staff, March 2014

INTRODUCTION

ALA’s vision for technology over the next four years will:

- enable members to: easily find current and historical ALA information, participate in learning activities and communities, participate in group work outside of face-to-face meetings, purchase goods and services in a convenient way, customize his/her interface with ALA, and help shape Association directions through virtual discussions, polling, balloting, and other virtual methods.
- allow the public to find basic information about ALA and libraries, access information about libraries and advocacy, join ALA, and purchase goods and services in a convenient way.
- provide demographic and other information about members for ALA and its units to use for data-driven decision-making and personalized marketing.
- implement privacy protections, security mechanisms, and business continuity provisions (disaster preparedness and response) for all aspects of ALA’s member and operational data and technologies.

The initiatives addressed in this document reflect the current areas of focus. While there are many additional services ITTS is responsible for that also have an impact on ALA’s ability to meet members’ needs (including maintenance and daily operations), this document specifically covers the following significant areas of focus:

1. Web Presence
2. iMIS Association Management System
3. Ecommerce
4. ALA Connect
5. Conference Management
6. Financial Management System
7. Social Media
8. Risk Assessment
9. Recommendations for Accelerating ALA’s Capacity

In the iterative cycle of discovery, implementation, and ongoing assessment, ALA ITTS is addressing the following realities, which will remain as challenges for the foreseeable future, regardless of whether IT work is done by staff or is outsourced.

- ALA’s heavily-layered organizational structure, which requires modification of standard systems and results in additional costs, extended implementation timelines, and increased maintenance requirements.
- Excess complexity of Association practices and lack of standardization, which must often be addressed and modified as part of every IT implementation process.
- The challenge of coordination across the Association to take advantage of creative work and minimize duplication of or conflicts between projects.
- Budget managers’ widely varying capacity to identify IT implications of new projects or scope changes as part of routine project definition and budgeting practices.
Diagram 1: ALA ITTS supports and manages some or all of 58 distinct service points for members and staff.
2013 in ITTS Numbers

3,833 help requests
3,522 requests closed (90%)
300 databases maintained
100 virtual servers in ALA’s cloud
90% of maintenance outsourced
58 areas of service
27 consulting firms
8.5 staff

Association-wide Support

iMIS
7,650,000 activities stored
500,000 user records
1,639 pricing rules
33 member types
16 connections to other systems

ala.org
25,505,460 pageviews
2,004,059 user actions
540,685 files downloaded
200,000 emails sent via the website

Connect
691,671 pageviews
170,045 visits
92,410 unique visitors
24,717 content items added
13,234 users logged in
2,500 groups
1. **Web Presence**

**Current Landscape**
Our primary web presence consists of a 10-year old ecommerce system, a Drupal Web Content Management System, Shibboleth for single sign-on, Solr Search, a very early stage of an elearning portal, member and customer profiles, a committee appointment application, ALA Connect (covered elsewhere in this document), and many other miscellaneous applications (such as scholarship applications, the awards/grants database, electronic petitions, donation forms, etc.).

ALA currently uses the open source Drupal software as its enterprise web content management system. Although it took years of planning, the bulk of the actual migration from Collage to Drupal was pushed through in a swift six months in 2012. More than 65,000 pieces of content were pared down to 30,000; 500 members and staff were trained on how to add content to the new system and accessibility improvements were implemented whenever possible.

The Drupal environment provides ala.org with a common, shared code base as the underlying foundation of the division, round table, and topical areas, which reduces maintenance of the software. In addition, ITTS staff are now able to more easily implement web-based forms, make additional accessibility improvements, brand division/round table and specialty sites, and create dynamic pages that don’t require a person to maintain them.

“The migration to Drupal dramatically increased the speed of the site for editors and users. Tasks that would take me hours to do in Collage suddenly took minutes to do in Drupal. Collage would take long periods of time to load pages in both the admin and public views. Drupal also allows an editor to make web edits on practically any device. Since migrating to Drupal, I've made important edits to pages on my phone while traveling on a train.

I'm very thankful the Association spent resources to migrate into Drupal. The time and money devoted to this project were well-spent.”

– David Vess, Chair of the ALA Website Advisory Committee

During the Drupal rollout, Shibboleth technology was integrated with iMIS logins in order to implement “single sign-on” using a secure connection. This means that when a user signs in to ala.org, she is also signed in to all other areas of ALA’s web presence that use Shibboleth for authentication. It has since been implemented with our conference vendors (ALA and its division national conferences), our conference recordings vendor, and our DSpace institutional repository.

In December 2013, ITTS implemented Apache Solr Search to replace its outdated (and no longer supported) Google Mini Search Appliance. Solr allows faceted searching of ala.org (similar to the way you can filter search results on Amazon), and it will eventually be extended to allow federated search with ALA Connect, providing members with the improvements in search functionality they indicated were important to them in the 2013 Membership Survey.
The committee appointment system is now 8-years old, and it lives in the ColdFusion system that ITTS is trying to retire. In addition to providing separate volunteer forms for all ALA units, it has customized administration forms for both staff and appointing officers. To maintain this important cornerstone of the volunteer and appointments process, ITTS has to maintain a separate server and old code to keep it running until resources are available to migrate it to our current code environment (PHP).

**Vision for ALA’s Future Web Presence**

In order to make ALA more understandable and accessible to members, we need to offer personalized paths to all ALA resources. The most ambitious way to do this is to offer each user a customized page on login called “My ALA,” which will be the showpiece of ALA’s web-based services. My ALA would bring together the relevant information ALA and its units offer in a custom view, personalized for each member based on his or her ALA affiliations, interest profiles, and network of colleagues. It would display relevant information from each member’s division/round table blogs and wikis, relevant news from *American Libraries*, CE events for which the person is registered, updates from colleagues modifying their profiles, new information from the member’s committees and workgroups, conference registration, new products that match their interests, new grants that match their type of library, and opportunities to get involved. It will make ala.org a compelling destination for our members and increase their engagement with ALA.

A new mobile website is scheduled for deployment in fiscal year 2015 to meet the growing demand for on-the-go access to ALA resources. In addition, a new enhanced elearning portal website, ALA eLearning Commons (eLC), will replace our existing ALA Online Learning portal at [http://www.ala.org/onlinelearning/](http://www.ala.org/onlinelearning/) in 2015, although it will still use static web pages that need to manually be updated by staff. The new site will be a comprehensive, easily navigated, one-stop resource where the global library community can find a full range of online continuing education and professional development opportunities offered by the ALA and its divisions. In a future phase, moving the portal to a database backend would let us dynamically generate course lists, allow automatic filtering of results based on a particular member’s interests, allow users to search for courses, and provide a way for us to combine ALA product placement within a course’s description page.

The integration of enhanced profile data from both iMIS and ALA Connect into one system members can access is essential to launching the new ecommerce system and preparing the way for helping members to more easily connect with each other. The enhanced profile data will allow the Association to display relevant continuing education and products offerings to members and customers based on their self-selected interests. It will also make it possible to implement a product like VIVO ([http://www.vivoweb.org](http://www.vivoweb.org)) in order to enable new ways for members to find colleagues with similar interests and work together in more informal ways.

In the new profile management system, members will have expanded profiles and since all of their self-selected interests will be available in iMIS, ALA units will be able to better target their marketing for relevancy. Phase one of this project merges the data from ALA Connect’s interest profiles in to iMIS. When funding becomes available, future phases could include:
1. **“My CE”** – Once the new eLearning Commons is implemented, we can add a section to member profiles that lets them easily find and track their ALA-related online learning.

2. **Member matching** – Once all of the membership data is aggregated in iMIS, we can implement VIVO and other tools to visualize existing and potential relationships between members, as well as build functionality for making virtual introductions between members. Leadership paths can be tracked and future leaders more easily identified. Robust profiles will also give us the ability to create a database of self-identified member experts within the membership directory along with the ability to vote up a member’s expertise.

3. **Historical CVs** – ALA Connect profiles already show current committee and dues affiliations on member profiles. A future phase will make member profiles into full-blown CVs that can be made public to supplement resumes. Since historical activities are stored in iMIS, we can show a member’s full participation in ALA over the years, including committees, divisions, round tables, sections, donations, awards, and more. With additional work on the future Event Management System, we can also display on profiles when someone spoke at an ALA conference and link to their session in the conference scheduler. The intent is to pre-populate member CVs with as much of their ALA data as possible to save them time and let that data help them when applying for jobs, grants, scholarships, etc.

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### 2. iMIS Association Management System

**Current Landscape**

This system captures member and customer transactions for dues, committee rosters, small events/continuing education, subscriptions, and fund raising. It is the brain of digital ALA and is the primary data source for authenticating to multiple pieces of ALA’s web presence. The Association can’t function properly when iMIS is inaccessible, and users can’t log in to online services if connections to iMIS break or stop working. Our reliance on this system over the years has grown exponentially, and it affects every aspect of work in every ALA unit and member group. Even a one hour outage can cause lost revenue, lost access to ALA resources, and lost productivity. It is by far our most critical resource.
iMIS tracks millions of transactions per year, which translates into millions of dollars of revenue that is then managed in our financial system. The current iMIS system was last upgraded in March 2011. We have been unable to upgrade the system to the latest version until now because we’ve had to focus our limited resources on other implementations (Drupal CMS, new financial system, and Solr Search).

Upgrading ALA’s iMIS installation is a more difficult task than it is at other associations because over the years our organizational structure has produced membership dues pricing that required the creation of 1,639 pricing rules in the software (most associations have 3-5 membership pricing rules). Upgrading iMIS now, before work on the new ecommerce system begins, means the iMIS integration only needs to be paid for once instead of twice. This customized environment requires continuous maintenance and makes the migration to a newer ecommerce system a significantly more difficult task.

**Vision for Future iMIS Enhancements**

The iMIS upgrade will allow us to offer more standard integration with our other systems, provide staff with mobile access to iMIS, and provide a current and robust foundation for the new ecommerce system. Reducing the complexity of ALA’s customizations would make connections into and out of iMIS more “plug and play,” which would greatly enhance ALA’s ability to implement new projects faster and at less cost.
3. **ECOMMERCE SYSTEM**

*Current Landscape*

This 10-year old system is used by members and non-members to join and renew 33 different types of membership, register for PLA’s national conferences, donate money, and register for many small events. It has processed millions of dollars and is tightly integrated with iMIS, our association management system.

The types of membership and the number of dues-based entities that need to be tracked have built up over the years to the point where these customizations require additional maintenance and IT resources just to maintain the status quo, making any changes difficult. Every new member type and membership special promotion adds to the number of rules that have to be implemented and maintained across every revenue-related system, increasing the complexity even further. This means there is no software ALA can purchase that can be implemented off-the-shelf to replace our existing ecommerce system. This was proven in 2013 when responses to our first ecommerce RFP were too expensive to implement because of the required customizations.
After much discussion with the divisions, all sections will become free as of September 1, 2014, in order to reduce the number of special pricing rules by 642 to 997. While this is definitely progress and it will help reduce the number of customizations needed, it doesn’t remove the need for extensive customizations, and we still won’t be able to implement any existing software as-is, out of the box. A priority continues to be to simplify the pricing rules and to reduce the resources required to hack and maintain new software.

**Vision for the Future of Ecommerce**

The new ecommerce implementation is scheduled to begin this summer and will provide much-needed new functionality. The new system will be more convenient for all users, allowing them to join, register, or donate without first creating an iMIS account. It will also let users purchase multiple items through a single shopping cart, view their past purchases, view recommendations, and use embedded customer service chat. ALA and its units will finally be able to offer promotional coupons and special offers and
embed ecommerce widgets on non-ALA sites. Screens will be more customizable and the interface will be much more user-friendly.

With a robust enough system that is more plug-and-play (i.e., not heavily customized), ITTS and Publishing could explore bringing the Store into ALA’s ecommerce implementation in order to integrate products directly with other offerings such as online learning, ala.org web pages, and ALA Connect.

4. ALA Connect

Current Landscape

Connect is ALA’s professional collaboration and community site for both members and non-members. A full report on usage of ALA Connect was posted on the ITTS blog in February 2014. Since its launch in 2009, the number of Connect groups has increased by 53% from 1,354 to 2,527, with 43% of all users logging in to the site at least once. A total of 126,497 content nodes have been added to Connect.

The site is built in Drupal, with the code managed completely by consultants. It maintains connections to iMIS and reads XML feeds from Conference Services’ room management software for the conference schedulers. iMIS rosters are synchronized to Connect automatically, saving staff from having to maintain rosters in multiple places.

“The Children & Technology Interest Group in Connect has allowed a number of librarians to come together to discuss issues that surround media use and children. There are strong opinions on both sides of the issue. What once was a sleepy online community gathered momentum when the ALSC Children & Technology Committee ignited discussion over a hot topic. Committee members lead, nudge and encourage respectful conversation over research, book discussions on screen time and more. The Group also has met in person at conference as result of conversations in Connect.”

– Gretchen Caserotti, Chair of the ALSC Children & Technology Interest Group

The site also hosts a mentor matching service called MentorConnect and the Opportunities Exchange, a service where anyone can post opportunities such as equipment giveaways, freelance work, grants, job exchanges, scholarships, and volunteering to name the most prevalent. In 2011, the new Conference Scheduler was implemented in Connect’s Drupal installation.

During the past five years, based on feedback from staff and members, many improvements have been made to the site, including:

• sending HTML email
• easier-to-read email notifications
• a redesigned interface
• group file repositories
• improved chat functionality
• the ability to comment by replying to an email notification
• group announcements
• reminders to vote before a poll closes
• the ability to “follow” a group to receive notifications when public content is added
• bulk deletion of content from a group

Although there are more superficial “bells and whistles” we could add to some of our features, we’ve been very careful to only implement those enhancements that meet ALA’s accessibility guidelines. We have even hacked some Drupal modules in order to add accessibility options (e.g., we added a “pause scrolling” feature to chat windows).

Further improvements planned for FY14 include:

• implementation of the Solr Search engine used on ala.org to improve searching on Connect
• a feature that makes it easy to poll group members for a meeting time
• the addition of the thousands of grant/scholarship awards in the FALIS Directory to the Opportunities Exchange
• notifications to community admins when someone joins their group
• the ability to start a new group discussion via email instead of going to Connect and logging in.

Vision for Future Enhancements
In FY15, we will be working on a responsive website theme that will become the foundation for mobile apps, as well as exploring the best way to implement digital badges for active participants. With Connect and ala.org profiles merging into a new resource as part of the new profile management system, we’ll be switching our focus from building a member matching feature in Connect to building a group matching one based on member profile interests. When the profile management project is complete, we’ll also be implementing Shibboleth so that logging in to Connect will automatically log you in to ala.org and vice-versa.

Our future roadmap includes building a committee reporting process that will help members easily file and find committee reports, a web browser bookmarklet that helps users quickly add content from other websites to a Connect group, enhanced group statistics, the ability to create informal volunteer rosters, and EtherPad integration (an open source version of Google Docs). We will also be revamping MentorConnect based on positive feedback from 2013 Emerging Leaders Team L. A user survey is planned for spring 2014 to gather additional feedback on future improvements to the site, including more community-based features.
page on the ALA website about conference, a wiki that was updated occasionally at best, and an outsourced event planner that required staff to manually import sessions using an Excel spreadsheet in order to update the data. To find information about a conference, users had to guess on which of these three sites it was housed and browse for it.

Fast forward to 2014, after three years of intense work by ITTS staff to determine the vision for a unified conference web presence. There is now only one Drupal-based website where attendees go to look for conference information. A new, very popular conference scheduler is integrated into the conference website (usage went up 62% from Annual 2012 to Annual 2013). Conference staff can update the website themselves in real-time instead of sending information to a third party and then waiting for changes to be made. Usage of the mobile apps continues to grow.

We already outsource the building of the conference websites, schedulers, registration sites, and housing sites. ITTS manages the consultants who do the programming for the conference websites and schedulers, and has also taken the lead to ensure that all conference resources are accessible to all users, even when the outsourced companies’ products are not ADA-compliant off-the-shelf. We’ve helped four conference-related companies become more ADA-compliant in the last two years alone.

“I love the scheduler! It’s my indispensable source for deciding what to do and keeping track of it all. Syncing to my phone lets me save the environment and my shoulders; no more heavy paper guide.”
– Andromeda Yelton, LITA Board member

In 2013, ITTS tried to implement a new, unified, event management system to improve the back end of the conference process. This service would have provided members with a single URL to submit a program proposal to any ALA unit. It would have allowed units to jury their submissions and approve sessions without re-entering the data in a second system. It would have made room planning and speaker management much easier, saving time for Conference Services staff.

However, the project was halted when the vendor asked to be let out of the contract because it couldn’t support the complexity of ALA’s structure. Rather than taking more of our money to build greater complexity into their system just for us, they walked away.

**Vision for Further Simplifying Conference Management**

In the immediate future, ALA needs to create a true iOS (Apple) app (the original one was rejected by Apple because it didn’t have enough iOS-only features) and expand the conference apps to allow users to access “My Schedule” and “My Exhibitors” when offline. Creating true apps (instead of scaled-down versions of the mobile conference website) would also allow us to implement push notifications in the apps. In the future, we want to move forward with plans to add ratings for both speakers and sessions.
Over the next few years, we need to be ready when the HTML5 standard is widely implemented across current devices. Using all of its features will allow us to move away from supporting individual app operating systems to one codebase that works across all platforms. This would be much easier to maintain and would offer more visual and interactive features at a reduced cost since we’d only have to implement code once.

ITTS will again attempt to implement a new event management system beginning in late 2014 if we get agreement from ALA units to drastically reduce the number of people who have admin access to the data (currently 500+). Reducing the number of people with ongoing access will save money on customization, allow much quicker implement of the new system, and concentrate on improving features instead of maintaining complexity in the software. Without agreement to reduce the complexity, we’re likely to run into the same types of issues with any vendor we select. These discussions are ongoing. Without a new conference management system, the submission and selection process across units will remain fragmented and confusing for members and speakers.

6. **Financial Management System**

Current Landscape
The suite of software used by ALA staff provides financial results in the form of monthly and yearly performance reports, bill payments, the creation of 80 separate budgets, and grant reporting. The system provides Accounting staff with a general ledger system (GL), an accounts payable system (AP), a fixed asset management system (FA), a budget management system, and software for scanning invoices.

The system was initially implemented in fiscal 2011 and parts of it have been customized by consultants to meet ALA’s financial needs. ITTS staff spent a significant amount of resources on the installation and implementation of all the pieces of technology that make up the financial suite, including the migration of historic data to the new system. We also provided access and expertise to the many consultants that worked on the project, and we designed and set up the virtualized application access for ALA Finance staff.

As with all ALA revenue-related systems, the Association’s nested organizational structure is replicated in an equally complex account structure in the software to track revenue and expenses by fund/sub fund, unit, line item, and project number. There are currently 22 Fund selections and 799 unit-project combinations. This GL structure requires continuous maintenance and support for creation of new project numbers, account combinations, and granting of permissions to view the accounts organized by unit.

This fiscal year we allocated a significant amount of time and resources for the implementation of Prophix Budgeting, which became a new priority over other projects due to the essential nature of the financial system. Customization of the financial suite software requires ongoing IT resources for managing the many consultants, staff support, troubleshooting, maintenance of the servers, managing software upgrades with the least disruption to service, and maintenance of users and permissions.
Vision for the Financial System
The Finance and Accounting team has asked that units reduce the number of projects needed to support their areas in an effort to simplify complexity. ITTS has completed the initial implementation of the system and will continue to support Accounting and Finance in their efforts to improve ALA’s financial procedures, seek efficiencies, and increase productivity.

7. Social Media

Current Landscape
Over the years, ALA’s social media presence has replicated its political structure, with each unit and initiative creating its own channels on each new service. As a result, a 2012 inventory found more than 75 Facebook accounts, more than 70 Twitter accounts, and similar results across other social channels. Our goal at this point is to move from a social presence of small pieces to a more unified whole that can leverage large numbers of followers and engaged members.

Initially, different units took the lead on different platforms, making coordination more difficult. In 2010, ALA created an internal “Social Media Working Group” to increase communication across units, share knowledge, and spread best practices. The SMWG meets twice each month and provides advice to other internal groups as requested, offer training sessions to all staff as time permits. Since its creation, the group has consistently discussed how to unify ALA’s primary presence on those social media sites where we interact the most with ALA members and the profession. It is important for ALA to be actively present on social media for member engagement, customer service, advocacy, visibility, and to participate in conversations about the profession.

In 2013, the Group submitted a plan to create a smaller, internal Social Media Team consisting of staff members from Conference Services, Customer Service, ITTS, the ALA Library, Membership, the Public Information Office (PIO), and Publishing. The plan was approved and this team now uses a service called HootSuite to manage ALA’s primary Facebook and Twitter accounts. We were also able to begin posting to ALA’s page on Google Plus using this new approach.
Metrics for ALA’s three primary social media accounts for the period covering March 1-18, 2014

- **Facebook**
  - 842,600 likes, comments, shares (engagement)
  - 35,689 followers

- **Google Plus**
  - 35 +1s, comments, shares (engagement)
  - 50,899 followers

- **Twitter**
  - 262 mentions
  - 561,600 mention reach
  - 301 retweets
  - 45,800 followers

The Team seeks to coordinate content across the three primary social media sites. Within time and resource constraints, they are challenged to create memes, post video to YouTube, engage more with our Google Plus page, post more visual content (pictures, infographics), and do outreach to potential partners.

With process changes internally, the balance between communication through traditional media through press releases and through social media through participation in conversations will shift. As the percentage of staff who use social media increases, tone/voice will become more “social.” ALA will be more adept at telling stories, creating memes and navigating new forms of communication.

In late 2013, ITTS and Membership created a plan to integrate ALA’s presidents into our social media channels and to experiment with new ways to engage members in these spaces. Options include tweetchats to help make the Association more human, Google Hangouts to help members understand how the organization works, behind-the-scenes videos, and campaigns to boost conference attendance. This will be an area of focus moving in FY2015.

**Vision for Future Social Media Success**

Looking to the future, a major focus for staff skills will be in some areas storytelling, creating images, editing audio and video, and blending different media to create an engaging narrative. Looking across the Association, these skill set shifts are already becoming apparent. That shift into the new, social communications environment will necessarily continue.

ALA will significantly increase its advocacy to the public in social spaces and participate more in professional conversations online. We will increasingly engage funders and legislators directly online and lead campaigns that every library can amplify. We should also translate the highlights from our various reports into social media audio and video sound bites that can spread virally. Increased use this technology and these social skills will make the Association more vibrant, approachable, and navigable.
by our members. Effective participation in social media is as important to the Association’s future as effective use of traditional media and will increasingly require the same level of attention at all levels of the Association.

8. Risk Assessment

As stewards of the Association’s technology infrastructure, ITTS staff constantly assess risk and balance potential consequences versus budget. The following risks are cause for concern and are current impediments to the Association meeting the needs of its members and staff.

Staffing/Capacity
There are currently eight full-time and one part-time staff positions in ITTS. In July 2013, we were forced to lay off two staff members due to budget constraints. These layoffs, combined with our inability to add staff over the past several years, have caused us to rely on a single staff member’s expertise in almost every area of service. The proposed FY2015 budget includes the addition of one additional position in ITTS.

ITTS staff currently manage consultants at 27 firms to support our infrastructure which includes a vast array of software applications as comprising 58 distinct major services. This management function includes developing specifications, coordinating the work of the consulting firm/consultants, and maintaining effective relationships with those firms and consultants. ITTS also handles the day-to-day operations and answers the many help desk tickets that come in every day from ALA members and staff. We provide first level troubleshooting and if an issue can’t be resolved internally, we have to bring in one of the 27 firms and work with them to fix the problem. Anything beyond first-level troubleshooting is already outsourced for 90% of the systems for which ITTS has some or all responsibility for maintaining.
ITTS is also called upon to provide much one-on-one assistance for staff working to master new responsibilities. A typical day for our trainer includes multiple requests for immediate assistance from personnel who have learning and troubleshooting needs related to serving members and maintaining critical parts of the operation.

**Security/Privacy**

ALA is always exposed to the continuous threat of intrusions – as are many organizations - with one consequence being the possible theft of confidential data both about members and the Association itself. From October 2006 to the present, ITTS has blocked 549,324 “distributed denial of service” attacks (DDOS) against ALA’s website and more than 7,400 viruses.

However, upgrades and patches to our server and workstation operating systems are constantly needed to secure and protect our systems environment. Reduced staffing levels have impeded our ability to stay current on all releases of our infrastructure (firmware, operating system, database versions, software applications, and other services), increasing the risk of security breaches.
Despite limitations in resources, many issues that were identified in 2009 have been addressed as new systems have been brought online and existing systems have been upgraded, but new threats constantly emerge. Regular security audits remain critical to the health of the Association’s technology infrastructure.

An example of the exposure to cyber threat for which ALA is at risk occurred in January 2014 when a version of the CryptoLocker virus was found on our network and four workstations, despite our current implementation of Symantec EndPoint virus detection software. This ransomware trojan forced us to restore data from a backup made prior to the virus outbreak. ALA was shut down for half a day and one day’s worth of work was lost in the crucial weeks preceding the Midwinter Meeting. Regular testing of backups and restores is a challenge to resources, but it is critical.

**Disaster Recovery/Business Continuity**

Our recovery/business continuity plan must be kept up-to-date. An example of the risk that not doing this presents occurred in the Fall of 2013 when a power supply in the backplane of our blade chassis caught on fire, causing an outage of several of our systems. A replacement part was secured and installed in the same day, and luckily further execution of our disaster recovery/business continuity plan was not required. While the implementation of updated plans was delayed in fiscal 2013 and 2014, the proposed FY2015 budget includes funding to proceed with prudent business continuity investment.

**Proper Maintenance of Data**

ALA has over 300 databases that make up our external and internal infrastructures, all of which require ongoing maintenance and upgrades. Backing up these databases is essential to keeping records about our member/customer transactions and our 138 years of institutional knowledge. This is, again, a resource challenge.

**Siloed Expertise/Management**

Due to staff reductions, every full-time staff person in ITTS is now responsible for managing specific, individual resources without sufficient cross-training for backing up that expertise. In each case, the ITTS staff member is responsible for first-level troubleshooting. If s/he cannot resolve the issue themselves, they must manage the intervention of a consultant to fix the problem.

This creates bottlenecks when someone is responsible for multiple systems, especially enterprise-wide systems that affect all of ALA. For example, we have one person on staff who fully understands how iMIS is configured, how it connects to all of our other systems (both external and internal), and our network topology.

This same person is also the internal expert for the configuration and maintenance of ALA’s financial management system. These are complex systems critical to the operation of the Association. The additional ITTS position included in the proposed FY2015 budget will specifically address the urgent need for a second individual who is fully conversant with ALA’s complex systems, the customizations ALA requires and the connections between critical systems – and able to both troubleshoot and appropriately utilize outsource resources.
Over the past decade, ITTS has explored the option to migrate to a new Association Management System. Each time, the conclusion has been that such migration was not feasible because of the cost of customizing a new system to handle ALA’s 33 member types and 1,639 pricing rules. ITTS is currently completing an upgrade to its present Association Management System (iMIS).

Improving Versus Maintaining
Whenever ITTS implements new software, the first step is always figuring out how to first customize it to replicate ALA’s pricing rules, nested organizational structure, and unit-based permissions. This is true regardless of whether the software is hosted internally or externally. Only then can we work with the vendor to figure out what is still possible within the new limits the customization has placed on the system’s capabilities.

Continuing down this path of “customize first” affects our ability to improve our digital infrastructure and services because so much effort must be devoted to complexity that may be unnecessary.

Barriers to Implementing Off-the-shelf Software
Nowhere is this threat of the status quo more apparent than in the four attempts made to implement “off the shelf” software packages during the last two years. In just this short timeframe, ITTS spent considerable resources implementing systems that were purchased because theoretically they would work for us “out of the box,” thereby reducing costs and implementation time.

1. **Cadmium/EventScribe** – ALA contracted with this company to record conference sessions and make them available to attendees using ALA’s authentication system. The service was to be completely outsourced, with the exception of the connection to Shibboleth for authentication. While the recordings process went fine and Shibboleth was implemented, the release of the 2013 Annual Conference recordings was delayed by six months while ITTS’ Senior Usability Officer worked extensively with the company to make the website and recordings ADA-compliant. This attention to accessibility is very important to the Association and its members. The need to educate external firms about accessibility and to rigorously test their products for accessibility is now incorporated in planning for use of any outsource services.

2. **CompuSystems/onPeak** – ALA switched conference registration and housing vendors in FY13, requiring new connections to both iMIS and Shibboleth. Again, while the services themselves were completely outsourced and housed on the vendors’ servers, ITTS staff spent months discovering and diagnosing registration issues with the pricing rules and working with the vendors to fix accessibility issues. In preparation for FY2015 conferences, registration pricing rules have been simplified and accessibility issues have been reviewed.

3. **CSI Profile Editor** – In order to unify ala.org and ALA Connect profiles before the new ecommerce system is implemented, ITTS purchased software that is specifically designed to let association members edit their iMIS profiles. Making the product work effectively with the ALA customized iMIS installation has been challenging. Additional customizations have been
required, pushing back the launch date.

4. **eShow** – See section on “Conference Management System.” AASL, ACRL, and PLA all use this software for their conferences and events, but ALA was unable to work with the company due to the customizations required by our pricing rules, organizational structure, and complicated approval processes. The Senior Associate Executive Director, Conference Services, ALA Divisions and other units are currently working through process simplifications to enable ALA to move forward with a comparable product in FY2015-2016.

As we look at future directions, it is imperative that ALA reach a point where ITTS can, at least to some extent, hack software products to make them better, easier to use and/or innovative – not just to replicate ALA’s complexity. Working together, we are making steps in that direction – and it is important that these efforts continue. This will continue to require the rethinking now happening across the Association.

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**9. RECOMMENDATIONS FOR ACCELERATING ALA’S CAPACITY**

In order to be nimble and agile enough to meet the needs of modern members and professionals, ALA must invest in its digital infrastructure, the backbone of 21st century services.

**Needed IT Staffing**

Four additional full time staff or equivalent consultants are recommended in order to meet ALA’s growing IT needs. The positions include:

- **AMS Administrator** (top priority and included in the proposed FY2015 budget)
  This individual will support existing functionality, develop new functionality, provide integration support, and assist in upgrading our Association Management Systems (major systems include: iMIS Membership System, GP Dynamics/SharePoint/Prophix Financial System, and the Knowledge Management System). He/she will be responsible for SQL server database support. One staff member is currently responsible for all of this work, so adding a second person would accelerate project timelines.

- **Server Administrator**
  This individual will support the ALA server farm currently consisting of over 100 virtual servers. Goals include development of an upgrade and maintenance strategy, replacement of obsolete servers, and consolidation of remaining physical servers onto virtual platforms. All of this work is currently outsourced to one person in one external company, which greatly inhibits our ability to implement new services.

- **Content Management System Administrator**
  As the ALA web presence has continued to grow, our need for staff to support that presence has
grown. ITTS needs a position to provide assistance on the implementation of a new E-commerce content management system; gather business requirements for new enhancements to the ALA website and translate them into functional Drupal modules; install new or modify existing modules based on these requirements; create new microsites; implement templating; deployment and workflow solutions based on requirements; research and apply security updates on a regular basis to Drupal (the CMS), and to over 100 Drupal modules, of which 46 are customized. All of this work currently falls on two staff members as a small fraction of their duties, which also includes managing the consultants who maintain the code for the ALA website. Providing more support for ALA’s website would improve functionality for members and staff.

- **Senior Web Developer**
  This individual will assist in the Association’s initiative to revamp its growing website and be the lead developer of database-driven applications such as online continuing education, scholarship applications, and online publishing. This individual will create, deploy, and document standards-based web applications. All of this work is currently done by one-and-a-half staff members with the assistance of additional consultants when budget allows. Adding capacity for web application implementations would accelerate implementation of revenue-generating enhancements.

*Continue Reducing Complexity*
ALA needs to continue conversations to reduce complexity wherever possible. The current discussion to reduce the pricing rules from 1,629 to 997 is a good start, but new ways besides “membership types” must be found for incentivizing membership. ALA has to encourage this kind of simplification at all levels if it wants to save money on IT implementations and better integrate with the outside world.
APPENDIX 1: ALA TECHNOLOGY ROADMAP 2014-2017

Note: All dates are subject to change at any time based on available resources. This list of projects does not include standard maintenance and day-to-day operations.

Last updated by ITTS on March 20, 2014.

FY14

March 2014

iMIS 20 Upgrade Implementation (Requirement for Ecommerce)
While reviewing ecommerce system proposals, it became clear that we need to upgrade to iMIS 20 first in order to avoid paying for the integration work to be done twice. The current plan is to complete this upgrade by the end of April.

Develop Website Server Sync for ala.org
A new virtual server needs to be cloned and configured in order to have a development server for new website initiatives.

Outlook/Exchange Upgrade
We need to upgrade from Exchange Server 2003 to 2007 because current support for Exchange 2003 ends in April 2014. This first step will upgrade our system to Exchange Server 2007 as a stepping stone to upgrading to Exchange 2010.

Blog & Wiki Server Migration
There are a few remaining blogs and wikis to migrate off of Dreamhost to our in-house server.

Online Learning Website Template Changes
We have been collaborating with the ALA Staff Online Learning Task Force on changes to the Online Learning template and the final changes now need to be implemented.

Upgrade Virtual Infrastructure
Our virtual server software needs an upgrade to the latest version. This upgrade affects all of our mission critical servers.

Postini Migration
Google is retiring their Postini anti-spam product. We will be migrating to Google Message Security as soon as we are notified by Google that they are ready for us to upgrade.

DSpace Institutional Repository
ALA has contracted with the University of Illinois to host our online archives. The system will be hosted on their servers and use our Shibboleth implementation for login authentication purposes. iMIS user roles and zones will be used to authorize access to content.
April 2014

**iMIS 20 Upgrade Installation (Requirement for Ecommerce)**
This upgrade will be completed by the end of April.

**Windows 7 Implementation/Microsoft Office Upgrade/PC Rollout**
Microsoft stops supporting the Windows XP operating system in April 2014. We are currently doing an inventory of all our applications to find out which ones work in Windows 7 and which ones will need upgrades. Note that some software, scanners, printers, and other hardware may not work with Windows 7.

**iMIS Continuing Education Units (CEU) Module Implementation**
This module will be used to track continuing education credits for members and customers. Phase I of the implementation is complete, and the iMIS module has been installed and is ready to go. Implementation of Phase II will include displaying CEU data on each member’s profile.

**E-Time Upgrade & Killing of Old Java Versions Exposed to Security Threats**
ALA’s E-time timecard system needs to be upgraded because the current version requires an outdated Java version that exposes workstations to multiple server vulnerabilities.

**Single Sign-On with ALA Connect**
This project will integrate our Shibboleth Single Sign-On software with ALA Connect in order to allow anyone who logs in to the ALA website to automatically be logged in to ALA Connect and vice-versa. This will also apply to the conference schedulers.

**ACRL Outcomes Microsite Grant Project**
We will be assisting ACRL in having the Assessment in Action: Academic Libraries and Student Success Team Action Learning Project website/searchable database priced by suitable vendors. It will be totally outsourced due to lack of ITTS resources.

May 2014

**Ecommerce Vendor Appointments with ITTS**
ITTS has reviewed the RFP responses and will hold demos with the top three vendors. Note that moving forward with implementing a new ecommerce system is dependent on the completion of both the iMIS 20 upgrade and the Profile Management project.

**Profile Management Project**
Once iMIS has been upgraded, staff will restart the project to merge profile data from ALA Connect in to iMIS in order to finish building the new member profile system. This new membership directory will offer greater search capabilities and will allow members to view more information about their ALA participations.

**Reduction of Special Pricing Rules Meeting for Small Events/Continuing Education**
Schedule a meeting with appropriate ALA units to discuss the need to reduce the number of special pricing rules for ALA events and continuing education.
June 2014

**Ecommerce Vendor Appointments with ALA Stakeholders**
After meeting with the top three vendors in May, we plan to hold demos with internal stakeholder groups in June.

**Select Ecommerce Vendor, Sign Contract, and Begin Implementation**
After holding demos with the top vendors and internal stakeholder groups, a vendor will be selected and contracts negotiated. Note that moving forward with implementing a new ecommerce system is dependent on the iMIS 20 upgrade, profile management project, and Shibboleth for Connect being completed first.

No other implementations before Annual Conference.

July 2014

**Profile Management System Go Live (Requirement for Ecommerce)**
The profile is the first step in account creation for new memberships and event registrants, and thus it is a crucial piece in the upcoming ecommerce implementation. The profile project objectives are to merge the data from the two existing profiles from ALA Connect and ala.org to make it possible for both members and non-members to view and update a single version of their profile from either location. It is also intended to make it easier for members to communicate their engagement with ALA as part of an online CV that shows ALA memberships, committee service, conference registrations, and ultimately continuing education.

**Online Membership Directory using Solr Search Engine**
Complete the second phase of the Solr integration that will make it possible for users to search the newly-merged master profiles, which will become our new Member Directory.

**Outlook/Exchange Upgrade**
Implement the second step of our Exchange Server upgrade from version 2007 to 2010 and roll out the 2010 Outlook client to all workstations.

**Citrix Server Upgrade for remote access to applications**
Our Citrix server farm needs to be upgraded because our current environment is no longer supported and is unstable.

**iMIS Task Centre Module Training**
Training will resume on this module to allow for automating a number of manual processes in iMIS and other Microsoft SQL databases.

August 2014

**Test Bundle Registration**
This testing ensures the site will be accessible to vision-impaired users, pricing is calculated correctly based on membership status, and the recording of bundled registrations in iMIS is working properly.
Implement new iMIS pricing rules for membership dues
Changes to pricing rules occur every year at this time. A reduction in the number of rules was agreed upon for the beginning of FY2015 which starts on September 2014. The reduction in the number of rules saves on custom maintenance.

TBD in August if Resources Are Available

Refresh Disaster Recovery/Business Continuity Project
We need to continue the implementation of our disaster recovery and business continuity plans.

Install and Test New Backup Software
New backup software is needed to support our virtualized server environment. The current software is inefficient and needs to be replaced.

Reconfigure Public Facing Network
Our public facing network needs to be renumbered to retire the old IP address scheme. This will facilitate changes of Internet Service Providers in the future.

Configure Internal Storage Servers

Virtualize Remaining Physical Servers

Reduce Single Points of Failure Across the Network
We currently have an application firewall that we need to acquire and install so that we have redundancy in the case of failure.

Complete Identity Management Project
We are currently using E-directory and Active Directory to manage our internal user login authentication, file directories, and print drivers. We need to install software to manage this from one location.

Rectify Browser Issues with Finance Applications

NACHA ACH File Format Changes (Accounting System)

Accounts Payable Vendor Merge (Accounting System)

Modification to Vendor Bank Detail Listing (Accounting System)

Fix Electronic File Transfer Notification Issue (Accounting System)

Update Monitoring and Alerting Software for All Services

Upgrade Windows Server Operating System to 2015

Upgrade SQL Server Databases
FY 2015

September 2014

Replace Uninterruptible Power Supply (UPS)
The UPS providing backup power to our servers needs to be replaced. The batteries in the unit are four years old and the unit itself is eight years old.

Install New Tape Backup Hardware
A new tape backup hardware solution is needed for the servers on the internal and public facing segments.

Midwinter 2015 Registration & Housing Accessibility/Pricing/Bundle Testing
This testing ensures the site will be accessible to vision-impaired users, pricing is calculated correctly based on membership status, and the registration for bundled users in iMIS is working properly.

October 2014

Federated Solr Search Engine for ala.org and ALA Connect.
This includes federated and faceted searching of both ala.org and ALA Connect.

Continue Working on Implementing New Ecommerce System

November 2014

Web-based Analytics Dashboard
Implementing this software package will enable executive management to quickly browse data to unearth trends and patterns about ALA. Users can rapidly query ALA information to create sophisticated charts and grids, pivot tables, decomposition trends, perspective views, performance maps, and key performance indicator measures.

December 2014

Begin Testing Ecommerce Solution
Start testing Membership Dues, Events, Subscriptions, and Fundraising in the new system.

Annual 2015 Registration & Housing Accessibility/Pricing/Bundle Testing
This testing ensures the site will be accessible to vision-impaired users, pricing is calculated correctly based on membership status, and the registration for bundled users in iMIS is working properly.

Preparing Website Routing for Youth Media Awards (YMAs) at Midwinter
The ALA website landing page must be changed to route YMA traffic to an outside vendor due to the extreme traffic when the YMA’s are announced during Midwinter 2015.
February 2015

Ecommerce Go Live
This marks the completion of the implementation of the new ecommerce system (see project details above). Implementation in February is dependent on successful completion dates for the iMIS upgrade, profile management, and Shibboleth for Connect projects within the previously noted timeframes. Delays in those projects will postpone the go live date for the new ecommerce system, as will rearranging priorities to place projects ahead of the ecommerce implementation.

Load Balancing for the ALA Website
Virtual servers need to be spun up and configured to allow load balancing for ala.org to better handle periods of high traffic.

March 2015

eLearning Commons
A new enhanced elearning portal website, ALA eLearning Commons (eLC) will replace our existing ALA Online Learning portal at http://www.ala.org/onlinelearning/. This project is dependent on the ecommerce project being completed first.

New Event Planning Management System
A new system must be in place and fully tested by the end of March 2015 in order to manage all of the proposal, abstract management, peer review, room management, and speaker management pieces of ALA conferences for the 2016 conferences. The RFP process will need to begin in mid-2014.

April 2015

Phase II Updates to the Profile Management Project
In this phase, we will build a member-matching system to help members build their networks and find other members with similar interests.

July 2015

Phase III Updates to the Profile Management Project
In order to let members to fully present their professional contributions, we’ll add historical data from iMIS to display past committee appointments, elected offices, conference attendance, conference presentations, works authored for ALA, and other forms of volunteer work on their ALA profiles.

August 2015

Committee Appointment Application Upgrade
The appointments and volunteer application is eight-years old and needs updating. This includes both the member views and the staff/admin portion. Both are also in need of design work to make this a more user-friendly and accessible application.
Implement Mobile Website using Responsive Theme
The Web Management Group (WMG) strongly recommends that the ALA web presence adopt a responsive design. Using the current ALA Drupal CMS, a responsive theme can be applied across the ALA web presence to better enable users to browse and interact with the site on mobile devices. Beginning this project is dependent on funding becoming available.

Sympa Upgrade
The Sympa server needs to be upgraded and we are several versions behind in the software.

FY2016

September 2015

Midwinter 2016 Registration & Housing Accessibility/Pricing/Bundle Testing

Phase IV of the Profile Management Project
Working with ALA units, we’ll implement a badge system that displays on member profiles to demonstrate competencies achieved through eLearning and volunteer work within the Association.

November 2015

Moodle Online Course Software Upgrade
Our Moodle software needs to be upgraded to support online courses offered by ALA units. Outside hosting companies will also be considered.

iMIS Committee Sync with ALA Connect
We need to resolve an issue with the nightly synchronization of committee roster data between iMIS and ALA Connect.

December 2015

Evaluate Hardware Refresh upon which virtual platform is based
Our network infrastructure needs to be evaluated to determine if it needs to be replaced. Some of the hardware may not be supported going forward.

Annual 2016 Registration & Housing Accessibility/Pricing/Bundle Testing

February 2016

Election Single Sign-On Implementation and testing
Update and deploy single sign-on technology for the ALA Election website.
VIVO Member Matching Implementation
Implement VIVO software to visualize existing and potential relationships between members. Leadership paths can be tracked, and future leaders more easily identified.

Dates to Be Determined

Shibbolize Remaining Resources for Single Sign-on Across More ALA Services

Replace ALA’s Staff Knowledge Management System

My ALA Website & My CE
As the landing page that members are taken to when they log in to the website, it will provide our members with a convenient way to explore and interact with the site's resources. It will bring together the relevant information ALA and its units offer in a custom view, personalized for each member based on her or his interest profiles.

New ITTS Help Desk System
Our helpdesk software needs to be replaced with a more robust system.

Draft Change Management Policy
Modify the draft change management policy to be more realistic based on ITTS resources.

FY2017

Midwinter 2017 Registration & Housing Accessibility / Pricing / Bundle Testing

Annual 2017 Registration & Housing Accessibility / Pricing / Bundle Testing

Dates To Be Determined:

Upgrade Web Content Management System to Drupal 8

Upgrade ALA Connect to Drupal 8

Investigate a New Phone System

No Due Dates

Evaluate Migrating to Google Email / Apps

Evaluate New Association Management System Alternatives

Evaluate Cloud Computing for Enterprise-wide Applications
Explore ALA Connect Options
## APPENDIX 2: ITTS TRAINING SUPPORT

<table>
<thead>
<tr>
<th>System /Software</th>
<th>What is it? How does ALA use it?</th>
<th>Show staff how to:</th>
<th>Show member-volunteers how to:</th>
<th>Stats</th>
</tr>
</thead>
</table>
| **Adobe Connect** | A web-conferencing platform used at ALA to offer:  
  - Webinars to members & the public  
  - Video Conferencing for web meetings (staff & members)  
  - Event module to market webinars using a registration process & built in e-blast for invitations |  
  - Create, host, manage, market webinar rooms; linking to events.  
  - Facilitate meetings & rehearsals.  
  - Coach presenters within the room.  
  - Setup audio for blended broadcasts.  
  - Troubleshoot participant, event & room issues. |  
  - Present, host, manage webinar rooms.  
  - Present material & navigate in the room.  
  - Explore options to engage participants: polls, raise hand, web links & layouts.  
  - Coach presenters within the room. |  
  Since 9/2013:  
  72 hosts in 336 events  
  Since the beginning (9/2012):  
  109 hosts in 736 events |
| **ALA Connect** | A centralized space where official ALA groups can work together online. It’s also a place where any member can create new communities (unofficial ALA groups) so the site combines association work with communities of interest.  
  - Features a visible, profile that displays member interests, as well as group participation.  
  - Promotes networking, mentoring, & opportunity exchanges.  
  - See more: [http://connect.ala.org/about#sthash.EU9HEMLj.dpuf](http://connect.ala.org/about#sthash.EU9HEMLj.dpuf) |  
  - Login & credentials.  
  - Navigation:  
    - Committees/Communities  
    - Search or browse by subject, new, unit & all.  
    - Profile  
  - How to contribute to a group:  
    - Add discussion/online doc  
    - Working with Drupal 6 WYSIWYG  
    - Making items public  
    - Add poll, chat, files, events &/or pictures  
    - Add/remove members  
  - Opportunity Exchange  
  - Mentor Connect  
  - Where to find more help. |  
  - Login & credentials.  
  - Navigation:  
    - Committees/Communities  
    - Search or browse by subject, new, unit & all.  
    - Profile  
  - How to contribute to a group:  
    - Add Discussion/Online Doc  
    - Working with Drupal 6 WYSIWYG  
    - Making items public  
    - Add poll, files, events & pictures  
  - Mentor Connect  
  - Where to find more help. |  
  Since 9/2013:  
  Members: 53 of 70  
  2014 Emerging Leaders  
  Staff: 24 staff (combined new hires & skill-share session) |
| **Drupal** | Web content editing software for ala.org & the 60+ microsites on this domain. | Live & self-paced learning options for Basic & Advanced web edits in Drupal 7:  
  - Page creation, format & edits, SEO, taxonomy, accessible images & tables, restricting access, inserting media, uploading images, redirection, links, anchors, committee pages & press releases. |  
  - Remote course offered every 3 weeks on Basics, with Committees.  
  - Advanced training on demand per each request for additional access. |  
  Since 9/2013:  
  Members: 12  
  Staff:  
  - 19 Basics  
  - 10 Press Release |
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</thead>
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<tr>
<td><strong>Google Analytics</strong></td>
<td>How to find the statistics of visitors on ala.org or any of the 60 microsites.</td>
<td>• Live &amp; self-paced learning on ala.org/support. • Staff login to see credentials to enter the Google account.</td>
<td>• Self-paced learning on ala.org/support. • Members login to see credentials to enter the Google account.</td>
<td>Staff: 20</td>
</tr>
<tr>
<td><strong>iMIS</strong></td>
<td>iMIS is the membership management database. In addition to contact information for every member, we can track almost every point of engagement through Activities. We can report on every payment sent, every committee served on, every webinar or event attended, every donation, every item purchased, &amp; more, lives in iMIS.</td>
<td>• Casual users can Find records, understand basic Member Management (paid thru Billing &amp; some Demographics), work with Committees &amp; run standard reports • Full users are made capable of the Casual users tasks, but can add Prospects to the database as well as create new committees in iMIS. Some have access to the Intelligent Query Architect, if requested &amp; training is completed.</td>
<td>Not offered to members.</td>
<td>Since 9/2013: Staff: 18</td>
</tr>
<tr>
<td><strong>Informz</strong></td>
<td>E-mail marketing to ALA members.</td>
<td>• Create simple templates or convert their MailChimp templates into Informz. • Assemble a mailing.</td>
<td>Not offered to members.</td>
<td>Since 9/2013: Staff: 14</td>
</tr>
<tr>
<td><strong>Moodle</strong></td>
<td>Full Learning Management System (LMS) for ALA distance learning courses.</td>
<td>• Create course shells for facilitators. • Create enrollment keys. • Request course Chat rooms. • Troubleshoot student issues with registration. • Post chat transcripts to the course. • Support course leaders with group functions. • Refer teachers to the Moodle help documents for self-paced learning. • Demonstrate uploads &amp; how-to create course elements, assignments, activities &amp; feedback entry.</td>
<td>• Support course leaders with group functions. • Refer teachers to the Moodle help documents for self-paced learning. • Demonstrate uploads &amp; how-to create course elements, assignments, activities &amp; feedback entry. • Troubleshoot student/teacher issues with registration, login. • Grant access to course. • Field questions.</td>
<td>Since 9/2013: Members: 6 Staff: 17 Fielding: 96 emails on Moodle issues</td>
</tr>
<tr>
<td><strong>MS Office</strong></td>
<td>Skill share sessions on Outlook, Excel &amp; Word on productivity issues; sharing shortcuts &amp; promoting the creation of accessible documents</td>
<td>• Live &amp; remote sessions covering Excel basics &amp; pivot tables. • Outlook discussion included folder sharing, book a meeting room using</td>
<td>• Not offered to members.</td>
<td>Since 9/2013: Staff: 53</td>
</tr>
</tbody>
</table>
| **Prophix** | Support for Accounting in the delivery of training on our Financial tracking software. | Calendar & Clean-up & Archive. | • How to enter Budget numbers, including fill-across options;  
• Workflow of budget processing & communicating roles for access.  
• Entering notes & how a SQL report will be created to display.  
• Exporting Prophix data to Excel. | • Not offered to members. | Since 9/2013:  
Staff: 75 |
| **Sympa** | Sympa is a mailing list management software. Its name is an acronym for Systeme de Multi-Postage Automatique (i.e. Automatic Mailing System) & also means “nice” (friendly) in French. |  | • Request password & login.  
• Create a new list.  
• Edit an existing list, (add/remove members).  
• Search Archives & Profile settings.  
• Troubleshooting high bounce rates.  
• Updates to the self-paced learning pages on the support site. | • Remote sessions have not been offered to members. | Since 9/2013:  
Staff: 7  
Fielding: 18 issues |
| **Windows 7** | Operating System we plan to upgrade to by the end of April. |  | • New look & feel.  
• Time saving improvements using the Taskbar, Jump lists, Snap & Windows Search | • Sessions will be offered to staff only. | • TBA after sessions begin April-August 2014 |
| **New Hire Orientations** *(includes systems not mentioned above, in bold)* | Staff training for new users receiving credentials for the ALA network, shared drives, Outlook email, Postini email, the ALA Knowledge Management system, Track-It, ALA Connect, Adobe Connect, iMIS & Drupal. |  | • We review logging into the network & Online Web Access (OWA.ala.org) to ensure that:  
  – They are capable of checking email remotely.  
  – They are capable of changing their Outlook password.  
  – They are able to find their temporary password for Postini.  
• We review the drive letters they will find under the Start/My Computer commands in Windows & stress to them the importance of saving work to their Home (H:) drive, as hard drives can crash & the network is backed up nightly so if something goes wrong, ITTS would have the capability of restoring work saved to the network.  
• We log in to the Knowledge Management system (also known as the KM).  
• We open Track-It & start a work order, testing access as the system prompts them to change their password.  
• We do a brief demo on how to book a meeting room using the calendar, & the need to update archive settings to I:*.*.pst.  
• We cover the phones & voicemail.  
• We log in to ALA Connect. |  | Since 9/2013:  
Staff: 15 in Chicago, & 5 remote. |
• We discuss additional systems & training that might be required for their jobs.