TO: ALA Executive Board

RE: ALA Strategic Technology Directions 2014-2017 Report Update

ACTION REQUESTED/INFORMATION/REPORT:

Review

ACTION REQUESTED BY:

Sherri Vanyek, Director Information Technology & Telecommunication Services (ITTS)

Jenny Levine, ITTS Strategy Guide

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DRAFT OF MOTION:

None

DATE: October 16, 2014

BACKGROUND:

The attached report provides an update on major projects in the ALA Strategic Technology Directions 2014-2017 Report sent to the ALA Executive Board in April 2014. The summary blog post and links to the full April 2014 ALA Executive Board
ALA Strategic Technology Directions 2014-2017 Report Update

Windows 7 Upgrade
In July, August, and September we upgraded approximately 270 staff workstations in the Chicago office from Windows XP to Windows 7. 600 unique applications were reviewed for upgrades and installed during the migration, and both Microsoft Office and Outlook were upgraded. A number of new workstations were also installed to replace old hardware and 97 printer driver policies were created.

New Internet Service Provider
Earlier in the year, local and long distance telephone service providers were switched and in September, ALA changed Internet Service Providers. The transition to the new provider was smooth and did not impact our telecommunication services. The new contract will save ALA $45,000 per year, reducing our telecommunication costs.

iMIS 20 Membership System Upgrade
ITTS has been working for months to upgrade our iMIS Membership System. The upgrade is scheduled for the weekend of October 17th. iMIS is the system that manages all of our member, committee, dues, CE, and registration data. This upgrade is very complex and requires some behind-the-scenes changes to the setup, not just a patch. The whole project has been complicated greatly by ALA’s extensive customizations of the iMIS software, as well as the fact that our ecommerce system is 10-years old. Completing this upgrade will let us begin work on selecting and implementing a new ecommerce system.

Usability & Accessibility Testing of Vendor Registration, Housing & Conference Recordings
ALA policy mandates web accessibility at WCAG, level AA in the international standard. To ensure that vendor resources will function properly for all visitors, ITTS tests logins, pricing, and other registration functionalities with 24* different test profiles by member type (Regular, Associate, Non-Salaried, Retired, Student, Trustee, etc.) and one non-member profile. Once all is correct with membership access and pricing, usually after several rounds, accessibility testing begins. The processes for accessibility testing include:
1. Using Freedom Scientific’s Jaws screen reader to log in, navigate the site, access content and complete forms using only keyboard and audio.
2. Examination of source code in problem areas.
3. Use of the Web Accessibility Toolbar and the University of Illinois’ Functional Accessibility Evaluator to develop detailed reports of problem areas.
4. Communication of issues to the responsible party at the relevant vendor via a written report.
5. Answering vendor requests for clarification via email or phone conference.
6. Reiterating through steps 1-5 until the service meets accessibility standards.

In some years, ITTS has only received access to the test sites a week or two before launch, which is barely sufficient for issue identification and insufficient for mitigation of issues discovered. We are now insisting on a test cycle that provides us with access 6-8 weeks prior to launch. This year was the first time that ITTS received access to the conference registration test sites early enough to complete several iterations of accessibility testing and mitigation in advance of launch. This is why the housing and registration sites were fully accessible for the first time ever.

*When division or other specialty unit pricing rules are in effect, the required testing expands considerably, since both division membership and non-division membership must be tested for each combination of division and each member type.

**Dreamhost Migration**

Before this project began, there were 150 blogs and wikis running on our account on Dreamhost. 60 wikis and 40 blogs were migrated to an in-house server, and several dormant and abandoned blogs and wikis were deleted. Two Dreamhost servers were retired, and the main blog and wiki server on Dreamhost is ready to be shut down. YALSA is scheduled to migrate its’ sites the week of October 20th.

The estimated cost savings of this project will be at least $300 per month, or $3600 annually. Our blogs and wikis have also experienced improved performance and reliability now that they are located on our server.

There are still 13 specialty Drupal installs on Dreamhost that are unable to be migrated due to customized installs maintained by outside developers for ALA units.

**Shibboleth for ALA Connect and the Conference Schedulers**

The completion of the iMIS upgrade is great news for ALA Connect and the Conference Schedulers because it means we can move those sites to Shibboleth. This means single sign-on between these sites and ala.org. Users will finally be able to log in to any of these sites with your regular ala.org username and password and then be logged in
to all of the other sites automatically (non-members, too). Our goal is for this to happen in early November before the 2015 Midwinter Scheduler opens.

**ALA Connect Survey**
The ALA Connect User Survey was completed in on October 13, 2014. There were 474 responses. The data is being analyzed to see where improvements can be made, as are the results of user testing with five individuals. A report containing the full results will be posted to both Connect and the ITTS News blog in November.

**Profile Management Project**
The Profile Management Project is the first in a series of projects that have been unable to move forward until the iMIS upgrade is completed. The second is Shibboleth for Connect and the schedulers, and the third combines ala.org and Connect profiles into a single profile that can easily be managed from either site. Phase one combines all of the data into one profile and future phases will expand the amount and types of data we make visible to you in your profile, including expiration dates for member dues, lists of continuing education activities completed, past conference registrations, and more. Our goal is to implement phase one in November.

**New Ecommerce System**
Our ecommerce system desperately needs to be replaced. With the iMIS upgrade almost done, we’re scheduling meetings with potential vendors in November. It will still be a months-long selection process while we involve all of the various stakeholders and go through contract negotiations, but if this project stays on track then we’re in good shape for a 2015 (calendar year) implementation.

**New Event Management System**
A proposal for a new Event Management system is currently under review. This system will:

- replace our program/abstract management systems across the association with a single system to solicit and evaluate program proposals and poster sessions.
- replace our session request submission form used to request meeting room and resource requirements.
- replace our speaker management system across the association with a single system to track and store information about speakers.
- replace our room and resource management system used to assign meeting room resource requests to convention center and hotel rooms.

The plan is to implement the system by March 2015.
New Estore System
ALA Publishing is in contract negotiations with a vendor for a new estore system to handle products to sell ebooks, books, webinars, poster, and more. The current timeline projects implementation in May 2015. The current estore software is no longer supported. The plan is to integrate the new estore with our iMIS membership system and Shibboleth single sign-on technology.