

**Society of American Archivists
Council Meeting
February 2 – 4, 2010
Washington, D.C.**

**Staff Report: Website Development
(Prepared by Brian Doyle)**

BACKGROUND

At its August 2008 meeting, the Council approved a recommendation charging staff to develop and issue, with assistance from SAA's Website Working Group, a Request for Proposals in order to contract with a Drupal site developer and deploy a new Web content management system. An RFP was issued in January 2009. Five proposals were received in response to the RFP.

Following telephone interviews with vendors and references, Beaumont and Doyle selected Common Places, LLC (<http://www.commonplaces.com>), a Boston-based Web development firm, and executed a services agreement on April 3, 2009. The project estimate for development services ranged up to \$43,500. Launch of the CMS was originally anticipated in August 2009.

In August 2009, staff reported that the planning phase was complete and that draft "content types" (i.e., database architecture), "site map," and visual "wireframes" were in the final stages of approval, with the Design & Development Phase being underway. Presentation of the alpha site was anticipated within the month, followed by the beta site, thorough quality assurance testing, and site launch in October 2009.

PROJECT UPDATE

Shortly after the August 2009 Annual Meeting, a senior programmer employed by SAA's member database vendor resigned. As a result, delivery of complex SOAP/XML routines, as well as specifications for their use by Common Places, was significantly delayed. These automated routines enable the member database to respond to SOAP calls issued from Drupal and return XML files containing essential data required to: 1) populate Drupal's table of users and synchronize core user information (i.e., name, username, and password) with the member database; 2) populate Drupal's table of component groups; and 3) automate assignment of content permissions for groups based on information maintained in the member database. These functions are critical to the effective operation of Drupal. It was not until late November 2009 that we finally began to make some headway in initiating successful calls.

In the meantime, Common Places released to SAA staff an incomplete alpha site in September 2009 to begin reviewing other content functions that are not contingent on the SOAP/XML routines. These include the *Directory of Archival Education*, the *Glossary of Archival and Records Terminology*, the *Thesaurus for Use in College and University Archives*, and general

features pertaining to the site navigation, to the home page, to Annual Meeting information, and to governance information. A veritable plethora of change requests, some major and others relatively minor, were generated by this review and are still being implemented.

The alpha site was re-released to staff on January 20, 2009, which was the first opportunity that staff has had to review functionality pertaining to content management for component groups. Additional bugs and issues are now being identified and redressed. However, a variety of features have been engineered that will significantly enhance the ability of members, nonmember constituents, and member leaders to effectively communicate among and between internal and external audiences via the website:

- All individuals with an SAA profile (including nonmembers) may log in to Drupal using their SAA username and password.
 - Authenticated users may post comments to certain content—i.e., provided that comments are enabled for that content.
 - Where appropriate, content may be restricted to active group leaders (as identified in the member database) or to authenticated members.
 - Group leaders have additional content permissions within their respective groups.
- Four “content types” have been configured for use by component groups.
 - Group Pages
 - Group Newsletters
 - Group Minutes
 - Group (Annual) Reports
- At this point, only one “theme” (i.e., design template) has been configured for the site. We strongly encourage Sections and Roundtables to use this theme in order to maintain consistent search and navigation tools. However, groups have been configured so that the theme can be hidden and custom HTML headers and footers can be displayed.

NEXT STEPS

Staff review of the alpha site was completed on January 27, 2010, meaning that all critical change requests have been identified and submitted to the site developer for follow up. Release of the beta site is scheduled for the first week of February 2010, followed by quality assurance testing, and launch later in the month. The launch will include selected content that requires relatively little review and editing for migration. An extended transition period will follow launch of Drupal, during which all remaining content published to www.archivists.org, including committee, Section, and Roundtable content, will have to be reviewed, edited as necessary, and either migrated into Drupal or disposed. Staff will facilitate this process for component groups on a case-by-case basis.

As the project lead, I am aware and regret that multiple launch dates have been announced to the members and subsequently missed, the latest appearing in the president’s column published in the January/February 2010 edition of *Archival Outlook*. In retrospect, it must be acknowledged that these projections were overly optimistic and significantly underestimated the complexity of the tasks at hand. There is a light at the end of the tunnel, however, and it remains true (per Peter’s column) that, “we are poised . . . to provide component groups with simpler means to manage their own web pages and engage in more robust content development and management.”