

USAIN Website Best Practices

The Website (Special Projects) Committee performs a quality review of the website information, both yearly and as requested by members of the Council or the Communications Committee, or other members as the situation warrants. The Website Committee communicates with appropriate responsible parties regarding the deadline for changes.

Duties and Responsibilities:

- The Website Committee will communicate with the EC, Committees, and Interest Groups about the importance of keeping the information up to date on the website and will communicate deadlines for annual or cyclical edits.
- The Website Committee will support as needed the EC, Committees, and Interest Groups in website changes, providing trainings and walking members through the required editing process.
- The Website Committee will review the website for broken links, incorrect information, and further edits.
- During the first three years, the Website Committee will update the Best Practices document as adjustments are made to the process.

At the end of the three years, or when the EC, Committees, and Interest Groups feel the Wild Apricot system is integrated into the organization and intuitive, the EC will discuss whether the Website Committee needs to continue as a Standing Committee or be disbanded.

Website Committee (Special Projects Committee):

- Treasurer (Jessica Page)
- Member of Communications Committee (Kristin Cooper)
- Co-Chair of Membership Committee (Amy Shannon)
- Co-Chair of Communications Committee (Inga Haugen)
- President-Elect of USAIN (Kristen Mastel)

Permissions:

	Full	Read-only	Membership	Event	Website Editor
<i>Admin account name:</i>	<i>Account Administrator</i>		<i>Membership Administrator</i>	<i>Event Administrator</i>	<i>Website Administrator</i>
<i>Email address:</i>	<i>usainweb@gmail.com</i>	<i>N/A</i>	<i>usainmembership@gmail.com</i>	<i>usainevents@gmail.com</i>	<i>usainwebeditors@gmail.com</i>
Communications Committee Chairs	X				
Website Committee	X				

EC					X
President, Past President, and Treasurer	X				
Conference Planning Team				X	X
Membership Committee Chairs			X		
Committees Chairs (restricted)					X
IG Conveners (restricted)					X
Business mgr		X			

Editing Timeframes:

- April-May: The EC updates all governance documents, including Action Plan, Bylaws, and Procedures & Rules
- May-June: The (outgoing) President will send a pdf of new Committee Chairs & Interest Group Conveners to the Membership Committee. The EC and (outgoing) President will:
 - review all pages nested under History (achievements, 25 years of USAIN, timeline, past officers) and the primary Leadership page
 - post the President’s Annual Report
 - update the EC page (early June)
- June: The Membership Committee will update the primary landing pages for each committee and Interest Group, as well as the membership for Committees (see below: **Updating committee or EC membership (annual process)**). The Committee will also review the “Join Us” page for accuracy.
- July: The EC and (new) President will review the Home Page, Contact Us, and Our Mission pages. The President will post the new President’s Greeting.
- August: Committees must update select pages:
 - Preservation & Digital Libraries reviews and edits two pages nested under Initiatives: Project Ceres and National Preservation Program.
 - The EC reviews and edits one page nested under Initiatives: Ithaka S+R.
 - Communications Committee reviews and edits pages nested under Resources.
 - Committees and Interest Groups review and edit their respective pages.

Tasks that would fall outside the timeframes:

- Post-Conference: The EC updates all pages nested under Conferences & Events (past conferences, hosting criteria, and conference proceedings)

- New Committee is created: The EC will provide the Website Committee with two sentences describing the new committee, the names/terms/institutions of the Chair(s), the EC Liaison, and the participating members. The Website Committee will create the new pages and designate the initial membership (see: **Creating new committee or IG pages**).
- Awards and Honors are awarded: The President-Elect will edit all pages nested under Awards & Honors (Service to the Profession, Special Achievements, Honorary Memberships, Conference Scholarships).
- Communications Committee: throughout the year, the Committee posts relevant news and manages events.
- Conference Planning Committee: edits the conference event.

Archiving:

- The following should be sent to the USAIN Archivist each year, for deeper archiving than what is provided by the Internet Archive: the wayback machine:
 - All governance documents (at retirement)
 - The PDF of committee rosters with chairs and members and Interest Group conveners (at creation)
 - President's Annual Report (creation)

Responsibilities (by Webpage):

- Home page and Contact Us page (*Executive Council*)
- About Us>all pages under Greetings, Mission (*President*)
- About Us> all pages under History (includes achievements, 25 years of USAIN, timeline, past officers) (*Past-President*)
- About Us> primary Leadership page and EC page (*Executive Council*)
- About Us> primary Committees/IG landing pages and rosters (*Membership Committee*)
- About Us> individual IG pages: individual IG conveners membership (*self-managed by individual members*)
- About Us> two pages (Project Ceres and Preservation Plan) under Initiatives (*Preservation & Digital Libraries Committee*)
- About Us> one page (Ithaka S+R) under Initiatives (*Executive Council*)
- About Us> all pages under Awards & Honors: (*President-Elect*)
- About Us> Leadership> individual committee or IG pages general updates (*Committee Chairs or IG Conveners*)
- News: (*Communications Committee*)
- Governance Documents> Action Plan (*Director* updates PDF and website)
- Governance Documents> Bylaws (*EC/Past-President*)
- Governance Documents> P&Rs (*EC/Secretary*)
- Join (all pages) (*EC/Membership Committee*)
- Conferences & Events (all nested pages) (*Executive Council*)
- Resources (all pages) (*Communications Committee*)

Renewals: Yearly for individuals or for institutions, based on the date of previous renewal.

USAIN Website Best Practices

General support links:

Customer Service: Wild Apricot provides free, unlimited customer service available Monday-Friday 9:30-6:00 p.m. EST and service tickets are submitted by emailing support@wildapricot.com with a 24 hour response time. MemberClicks and YourMembership also provides similar live support.

Assistance pages: <https://help.wildapricot.com/display/DOC/Home>

Account Number: 216041

Wild Apricot test site: <https://usaindemo.wildapricot.org/>

Updating committee or EC rosters (annual process):

The USAIN President will email the Membership Committee in late May the membership roster for all committees. The membership committee is responsible for updating the chairs and general membership on the website. Chairs and Co-Conveners are manually displayed and must be editing using the following steps:

1. Membership committee logs into Wild Apricot and enters Admin View
2. Select Website>Site Pages
3. On each Committee and IG homepage, manually edit the chairs and Co-Conveners listed on each page.

After chairs and conveners are updated, you must also manually edit the general membership (these edits will allow membership to dynamically display). Steps include:

1. Choose "Members>Groups" from top menu bar.
2. Select the Group name you are updating
3. Next, choose the "Manage Participants" tab and add/remove participants as needed.
4. Click "Save all changes"

Creating new committee or IG pages:

If a new committee or IG is created, these are the steps for creating new pages.

1. Membership committee logs into Wild Apricot and enters Admin View
2. Select Website>Site Pages
3. Find an existing committee or IG page and Add page>duplicate page
4. Click>Edit
5. Scroll up on the page settings menu and change the Page name to the Committee name

Next choose:

- Position in menu>After selected page: choose the order of new page
- Access Level: Public
- Page Title: Change to title of Committee

Next click on the text box in the body of the page:

- Change the Gadget title to the name of the committee
- Paste in the committee description in the body of the page
- Adjust the can search utilized by the member gadget

Add members:

- (see above: **Updating committee or EC membership (annual process)**)

Images

Save images in the images folder (this is the default folder), providing a clear name for the image.

Document/file naming

Wild Apricot auto-defaults to the images folder. When uploading files, click on “resources” and locate the “documents” folder under an appropriate title “i.e., Past Conferences, Governance Documents, etc.).

Updating Member Renewal Date (Membership Committee Only)

Login to Wild Apricot and select Members>List

Search for and select the member you need to update

Edit the member and change the “Member since” to the appropriate date of previous renewal