

**Society of American Archivists  
Council Meeting  
February 1, 3, 2023  
Virtual Meeting**

**Staff Report: Technology  
(Prepared by Director of Operations, Cherie Newell)**

Most of the activities of the Technology and Operations team fall under Goal 4 of the Strategic Plan: “Meeting Members’ Needs.” Our aim is to support the technologies and tools that empower our members and equip staff to deliver excellent service.

**IT System Improvements**

Our list of improvements to our servers and basic IT systems has continued. Chicago Transom Partners continues to serve us in the capacity of a technical help desk and managing our Office 365 licenses, as we continue to explore maximizing the use of Microsoft Teams, OneDrive, SharePoint, and their multi-factor authenticator.

We launched Microsoft Teams as a pilot, while we plan for the setup and integrations for a full implementation to all staff and other users. Teams’ deployment is contingent on how we set up our SharePoint, which was delayed due to staff transition.

In the meantime, we completed the selection process for our phone system in October and have since completed the upgrade and deployment of a new softphone solution. All local and remote staff have a softphone system installed with access from either their laptops and/or mobile devices to answer and respond to member calls.

The critical items on the technology road map are the 1) multi-factor authenticator 2) OneDrive and 3) SharePoint. This will close our risk gap, improve the file workflow, and provide a file directory secured and accessible from anywhere without version control issues.

**Drupal Upgrade**

This upgrade has been delayed, but now listed as one of our top priorities. Our dated infrastructure poses continued risk and many limitations; we are moving forward with planning the upgrade from Drupal 6 to Drupal 9 with a pathway to Drupal 10. We are working with CommonPlaces to design and launch a new website that will meet WCAG accessibility requirements.

**Platform Analysis**

A preliminary analysis of the various systems, applications, and integrations for the member experience was conducted. It was determined that there is a need to conduct a platform analysis to strategize for the following: 1) data governance 2) process automation, and 3) engagement scoring. The timing for this analysis will follow close to or immediately after the Drupal upgrade planning has been conducted.

### **Supporting Staff Transitions**

SAA staff has transitioned with and without hand-off, exposing various gaps in the processes in areas where the precedent staff may have filled in to assist. In addition, staff would like access to ongoing technical training, such as Excel, along with access to a good workflow or project management tool.

Technical skills and application are an area to plan for staff training. The IT discoveries with staff were helpful in better understanding more of the technical limitations that some staff and members experienced. Meanwhile, staff training on content management, association management, learning management, community relations management, and accounting systems is required.