Annual Report: IT updates, 2020
By Cathy Lee Gierke

Website updates

- Membership: I regularly (every 2-3 months) send database tables to Virgil for his use in an Access database to pull stats on Membership.
- Newsletter: I coordinate monthly with Kris, making a few changes that she does not have access to do, and responding to her requests for help or modifications.
- Software Support: Track and manage needed updates to our membership application, working with Max Fierke to prioritize needs. After updates are made on our Staging site, I test and verify they work as expected; approve Max to move changes to our production site; then I test the same fixes on production, making sure they all work there as well, and that all changes were successfully moved from the Staging environment to the Production environment. [Max's work is itemized below.]
- Communications: I've been sharing information on best practices for writing for the web with Kris, Jean and Therese:
    - Web pages need to be skimmable, since web pages are normally consumed by skimming.   Article titles should be concise; intro paragraphs should be concise summaries of main points; visual cues, including bullets, increase skimmability; Forum and workshops should have bolding to highlight Name, Title, and Organization of our speaker, so that jumps out at readers.
    - I sent information about our Nicollet web template. It has many options that can be used to introduce visual cues and highlight content within articles: callouts, quotes, buttons, boxes, etc.
    hub.ahc.umn.edu/communications/web/tools-systems/web-theme
- Communications: Met with the Communications & Outreach subcommittee last winter to discuss options for sharing web and other IT tasks. Theresa Taylor was interested in assisting with the web and with the Forum recordings
    - Trained Therese Taylor to record the January meeting with a new process since software had changed and the old setup no longer worked. [She decided not to do the recording]
    - Recorded the January Meeting with Zoom
    - Trained Jean Kinsey to record the February Meeting with QuickTime
    - Trained Jean Kinsey to upload the YouTube video from the February meeting.
- Worked with John Anderson and Virgil to review the UMRA email group membership, and the listing of postal addresses we send newsletters to. (This came up because the I noticed the stats Kris used in her May report did not match the database numbers.)
    - Total membership count was off by 32. I show 668, Kris reported 634.
    - UMRA database shows 124 members requesting newsletter delivery by post. Kris reported 161. 190 are printed monthly; 125 are sent by USPS; 39 sent by campus mail. (Extras were for archiving and distribution at monthly meetings.)

- o UMRA database shows 570 members with valid emails requesting email delivery of newsletter. Kris reported 620.
- o There were 41 email addresses on the UMRA listserv that are not anywhere in the UMRA membership database. These would be non-members.
- o There were 32 email addresses on the UMRA listserv that are currently inactive. These needed to be removed.
- o There were 137 email addresses on the UMRA database that were not in the UMRA listserv. These needed to be added to the UMRA listserv.
- o Many emails in the UMRA listserv started with * (obviously bad emails). Those are addresses used for members for whom we don't know their email or they don't have one.
- Continuity: Worked on the Continuity Committee to develop a process for storage of UMRA documents and ownership of documents to facilitate the Annual Update, for both the website and the Historical committee.
- Tech: Will be attending a Drupal workshop in July to find answers to what might be the best option for us, Drupal lite, or regular Drupal. Drupal lite has a few of the capabilities we need, but the workshop will help me to determine if it has all of them. [Note: It will now be supported for another year, until Nov 2022.]

Membership application and database updates

Max Fierke does the hardware updates, and programming updates for our Membership application and database. He continues to be available regularly for requested updates, and even, at times, on an emergency basis, although he of course is not retired.

- June 3rd/4th 2019. Fix -- Fixed some issues related to payments
- August 14th 2019: Updated the membership form used by Admin to make deceased obviously different than living people; change wording on newsletter preference as requested; allow only one member of a couple to request paper newsletter; cascade deletion of related tables when a member is deleted by an Admin.
- Around August 29th 2019: Implemented a feature to copy details from luncheon transactions details (parking, dietary restrictions) into reservation details so it can be displayed and downloaded by Mary Ford. These changes, and the next few, were added to allow Mary to avoid the shadow system that was used previously to keep track of the things not captured by the database.
- Around September 24th 2019: Fix -- Addressed some issues with members with multiple emails being able to use the system.
- Around October 13th 2019: Updated UMRA Leadership page with current leadership https://retirees.umn.edu/leadership
- Around October 13th 2019: Implemented some changes for Mary Ford to make luncheon roster CSV exports more useful (added / removed fields as required) and allow folks to request parking reservations for luncheons.

- Around October/November: Implemented automated error notifications, making it easier to detect and debug issues
- Around Dec 4th 2019: Moved retirees database to a new database server as required by UMN IT. Normal maintenance.
- Around Jan 27 2020: Updated the drop-down to allow greater date range for date of death. And to change the search screen to pop down to the search results after a search.
- Around April 7th 2020: Moved the Membership web app to a new app server to replace the decommissioned one and upgraded some underlying technology. Normal maintenance.
- April 17th 2020: Responded to my (urgent) request to investigate Kris Mortensen's attempt to log in, which was failing – after I worked with her and it still failed. (Turned out to be an issue on Kris's browser)
- March 19th: Responded to my (urgent) request about how the cascading deletes worked after I helped Virgil reconcile some records, and had an unexpected results.