Recommendation regarding development of the member portal

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9/10/15

# Recommendation

The Electronic Services Advisory Board recommends that the American Fisheries Society pursue development of a responsive member portal which will be served via iframes on fisheries.org, and that the member portal be simplified to contain only the necessary navigation and content for serving iMIS data and tools. Redundancy in programming, navigation and content should be avoided.

# Votes

Five members voted to recommend iframe use. One member voted to develop a greatly simplified standalone portal, but without any redundant programming, navigation or content. Two members (oversight committee representatives) abstained because of recent changes in their committees and resultant poor representation on the ESAB.

It should be noted that non-voting members and ad hoc website committee members also unanimously supported iframe use and consistency with the primary website design of fisheries.org.

# Project Requirements

**Goal**: AFS web site should have seamless integration with iMIS to create a user experience that provides for efficient, accurate, attractive, and engaging business operations (e.g., meeting registration, membership actions, purchases, etc.) and supports differential access to AFS web content based upon membership status.

## Desired features:

1. Single sign-on recognizes and displays the status of the person and attributes subsequent operations with that status, such as accessing the appropriate level of user assigned content and pricing based on sign-on status. There is no need to re-enter passwords.
2. When interacting with iMIS components, the user does not notice any change in style (look and feel of the interface).
3. The layout of all components of the Member Portal (profile information, dues/subscriptions, certification, awards, meeting, leadership involvement) is unobstructed and provides the user with the best customer and member experience.

## Solution requirements:

1. Interface (portal) must be fully responsive so as to work equally effectively on all devices (smart phone to desktop).
2. Should adhere to best practices and standards of the industry or, at the least, follow technically appropriate trends in the commensurate user community.
3. Must be cost-efficient relative to overall web site management and revisions.
4. Should result in a product that AFS staff can manage, revise, and update as needed without unnecessary need to engage outside contractors.
5. All components should be fully supported by ASI so that any upgrades to iMIS will include commensurate upgrades to portal components such that additional coding or other web site changes are not required or minimized.
6. Must be a flexible system to allow for efficient construction of new “panels” such as for annual meeting registration.
7. Should support the fully deployment of iMIS communities functions or other new features that may become available

The following document will discuss the ESAB’s recommendations regarding responsive design of the member portal, how the member portal is served to users, and content appropriate for the member portal.

# Definitions

**Member Portal** – any page through which we convey data from the membership database (iMIS). There will be a main portal page for account management, but there may also be a member directory page, meeting registration page, and donations page which go to specific places in iMIS.

**Responsive** – able to adjust to different screen sizes (e.g., large monitor on new a computer, a small monitor 800x600 on an old PC, mobile tablet, smartphone). Adjustments typically affect the overall screen width, narrowing to fit all content within the view without horizontal scrolling, and navigation placement and appearance. Navigation typically switches from a large horizontal or vertical menu to either buttons or an expandable menu button on small screens.

**Standalone site** – a page or pages which are programmed separately from the contract with Wood Street.

**Style** – determines formatting, responsiveness, and overall appearance. Currently can be controlled for new site through the WordPress Dashboard/theme. A member portal would require style programming as well to address responsiveness and appearance.

**Content** – text, photos, links, and other items which are on a site, regardless of their formatting. Content may not change when making a site “look good” as most of the changes are style changes.

# Key Element #1: Responsive Design

The new member portal must be responsively designed. That is, the portal should adjust to various screen sizes on any page, including iMIS-supported tools and features such as Communities. If the upgraded version of our current membership tool is actually “responsive,” then any contract with ASI becomes much smaller as building in responsiveness is no longer necessary.

The new AFS website has width-based breakpoints at which the layout and style adjust to a different screen size:

* 479 pixels (for mobile phones)
* 767 pixels (for mobile tablets)
* 1279 pixels (for smaller PC screens)
* >1279 pixels (for greater screen sizes)

This breakpoint width is for the entire site’s width including the outside border (A). Therefore, the content of the page fits within a slightly narrower width (B). The breakpoints for a framed member portal would be identical to the list above, less the border width. These breakpoints are essential for proper responsive design on the member portal.



**B**

**A**

# Key Element #2: How the Portal Is Served

Regardless of responsive design, the portal can be served to users via an iframe or as a standalone site. The Electronic Services Advisory Board recommends use of an iframe, rather than a standalone approach, because use of an iframe better meets the project requirements and thereby provides a better user experience. Properly designed, users won’t even know whether a frame is used or not. The page design should not change when they go from a typical page to the member portal, and any framed content would be formatted to perfectly match the site. The goal is to provide the best user experience possible.

The standalone approach creates a number of concerns regarding initial cost, ongoing maintenance time and costs, redundancy of programming and lack of staff experience editing a master template.

## Comparison of Features

| Feature | Framed Approach | Standalone Approach |
| --- | --- | --- |
| Responsive design | Responsive iframes adjust with screen size and can contain responsive contentFully capable of meeting responsive design requirement | Can contain responsive contentFully capable of meeting responsive design requirement |
| Best practices in the industry | Iframe code is part of the HTML5 standard, including additional attributes, and is expected to remain long-term. | Membership contractor claims “everyone else does it” but is relying on examples wherein the entire website was built via their company. |
| Cost efficiency | Use of iframes allows creation of a greatly simplified member portal, avoiding all redundant programming. Therefore, this should reduce the cost of developing the responsive member portal. | More expensive, requiring development of not only the member portal but also a “master template.”  |
| Maintenance | Maintenance of the portal would be greatly simplified, because the portal would be greatly simplified. No “master template” would require maintenance by staff or ASI. The portal would be edited through RiSE, as usual; staff members do not edit through the frame. | Maintenance of the portal “master template” may or may not be difficult; ASI could not provide any examples/demonstrations. It may require ongoing assistance from ASI.  |
| Support from ASI | Non-issue; the AFS would not be requesting support for frames from ASI.The ASI should not refuse to support a responsively designed member portal; this is unrelated to how that portal is served. Appropriate responsive design is the key. |
| Flexible Editing of Portal Pages | Member portal pages would be managed through RiSE; any concerns regarding responsive design can be resolved by testing for responsive design. This entails testing new pages with various screen sizes; this is necessary regardless of framing. | Member portal pages would be managed through RiSE; any concerns regarding responsive design can be resolved by testing for responsive design during page creation. This entails testing new pages with various screen sizes; this is necessary regardless of framing. |
| Enable iMIS Tool Use | Non-issue; the iMIS tools should be available in a responsive design; this is unrelated to how the member portal is served. Appropriate responsive design is the key. |
| Navigability | Ensures consistent navigation and style in header, footer, and overall layout. Avoids all programming redundancy and associated duplicate editing, revision, and maintenance.Sliders are a non-issue, as the “double-slider” created by some frames can be programmed out very easily. Wood Street would do this. | With a redundantly programmed “master template,” it could provide consistent navigability with the rest of the website but at a cost of duplicate maintenance of said template. Doubtful whether this “master template” is easy to edit or capable of appearing exactly like main site, given the lack of examples from ASI.Without a master template (i.e., the “simplified” version for which one ESAB member voted), navigability with the rest of the site would be lost, but could focus the member on the portal content only. However, this is a problem when attempting to integrate a tool like Communities into wider use on the site.Sliders are a non-issue. |
| Seamless Integration | Can be formatted such that the user has no idea frames are being used. Combined with the use of the main site navigation, ensures a seamless experience by the user. This is especially pertinent to iMIS-supported tools which do not fit under the typical “Membership” navigation, such as Communities or potential continuing education applications. | Requires the ongoing maintenance of a “master template,” assuming that template is easy to edit and capable of appearing exactly like the main site (no examples available). |

# Key Element #3: Content Contained in the Member Portal

As discussed at the business meeting on August 18, 2015, in Portland, Oregon, content which is better served on the main site (i.e., outside of the portal) is best removed to reduce redundancy and avoid provision of inconsistent information to users. This includes general information about the American Fisheries Society, information about membership types, and information about how to join/renew.

Generally, the portal should be used for transactional information which interacts with the iMIS database (my account, member directory, annual meeting, donations), not for general information. In addition, tools which are available via the membership service (e.g., Communities) should be served through the member portal.

# Contract Scope

Given the expected upgrade to the membership tool, we felt it important to point out several scenarios which affect the contract scope.

1. If the upgrade is responsive at the necessary breakpoints to match the new website, then a contract would not need to add appropriate responsive design.
2. If the upgrade is not responsive at the necessary breakpoints to match the new website, then a contract would need to add the appropriate responsive design at the appropriate breakpoints.
3. If the upgrade is not really responsive enough to meet our needs (as it is now), then a larger contract would need to develop responsive design at the appropriate breakpoints.
4. If iMIS-supported tools (e.g., Communities) are not provided in a responsive design, their archaic appearance and inflexibility will hinder their use long-term.

NOTE: If the RiSE editing side does not reflect responsive design during WYSIWYG previews/testing after being “upgraded,” then that is a shortcoming of RiSE. It is unrelated to frame or standalone approaches and will not change regardless of which approach is used; editing time for new pages will be the same either way.