How to Edit Listings in the
Directory of Archival Consultants

Thank you for listing your archives consulting business in SAA's *Directory of Archival Consultants*. This document provides instructions for how to edit your listing. Before diving into the technical details, we want to suggest a few steps that you should consider to maximize your online marketing efforts:

- **Upload a photo or company logo.** Photos and logos appear in directory search results and help draw attention to your listing.
- **Enter a description of your business, services, and/or clients—even testimonials.** This helps differentiate you and/or your company from other listings. The leading copy in your description also appears in search results.
- **Use the Expertise taxonomy, including specialty sub-terms, to describe your business.** This is one of the main ways that users will find your listing.
- **If you have brochures and/or white papers, upload them using File Attachments.** This is another tool that you can use to enhance your business profile.

Questions?

Contact SAA Web and Information Systems Administrator Matthew Black at mblack@archivists.org, or call us toll-free at 1-866-722-7858.

Accessing Your Listing

1. Access to listings is granted by the SAA staff to a single individual—the listing administrator.
2. The listing administrator should log into http://www2.archivists.org/consultants via his or her SAA profile. (If you need help retrieving your password, please contact the SAA staff.)
3. Go to your listing in the directory.
   a. You should have received a direct link from the staff.
   b. You may also search for your listing by name.
4. The listing administrator will see two tabs at the top of the page:
   a. The View tab displays your listing in the normal format that site visitors see.
   b. The Edit tab displays the listing fields to which you have editorial access.

Editing Your Listing

Name

[See Fig. 1]

The name of your archival consulting business.

(e.g., ACME Archives Consulting, LLC; Jane Doe Consulting)

Company Logo

[See Fig. 1]

Browse your local drive to upload a personal photo or company logo.

Expertise

[See Fig. 1]

This is a two-level vocabulary that end users can use to search for listings in the directory. You may apply as many terms as you desire, but your listing must contain at least one primary term.

- *Primary terms* are a closed set intended to cover all of the possible domains of knowledge and practice that describe archival consulting.
- *Secondary terms* are user-specified and are intended to cover areas of specialty within the primary domains. For example, if you specialize in the preservation of photographs, choose "Preservation," then:
  - Select the specialty term if it already exists, or;
  - Select <create new item> and enter your term (e.g., Photographs). *Note:* Secondary terms are optional.

After you specify your term(s), be sure to click the Add button so that they appear under Your Selections. Also remember that you must click Save at the bottom of the page for your changes to take effect.

Figure 1

Location(s)

Listings in the *Directory of Archival Consultants* support multiple locations for partnerships and larger companies. Every listing must have at least one location. Required fields include Contact Name, City, State, and Country.

Note: *Location Name* is used to distinguish between different "locations" on the same listing. Possible values include phrases such as Corporate Headquarters, Chicago Branch office, etc. Regional designations may also be used—e.g., East Coast, Midwest, West Coast. You can also use terms to distinguish between different customer segments (e.g., Individuals and Families, Nonprofit Organizations, Corporate Customers, etc.) or areas of practice.
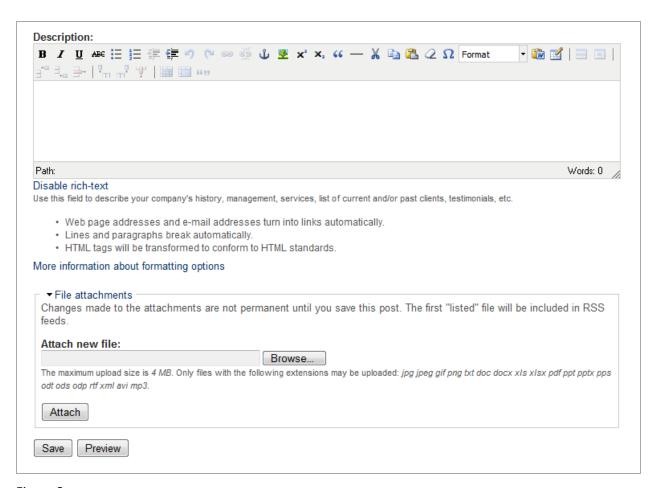

Figure 2

Figure 3

Description
Use the Description field to describe your business, services, clients, or even display testimonials. Think of it as an online brochure. The formatting bar enables you to easily format numbered and bullet lists, paragraph indents, and subheads. You can also use the picture tool (the icon that looks like a tree) to embed additional images directly in your text.

Some formatting tips:
- When copying from Word, be sure to use the Paste from Word icon.
- Remove non-standard font formatting by selecting text and clicking the Eraser icon.
- To quickly format subheads, use the Format drop-down menu to apply styles such as <H2>, <H3>, and <H4>. This will leverage the SAA website's pre-existing style sheets and yield consistent typography.

File Attachments
Upload PDF versions of print brochures, white papers, etc.