

## UNC TLT Portal Update, January 22, 2001

### **PROFESSIONAL DEVELOPMENT PORTAL (PDP) TEAM**

The PDP team had a very successful meeting at NCCU on December 8 to review the portal development. As a result the project has been broken into three components and work groups:

**Knowledge Base Group:** This group will develop content under two KB categories, and in the process review the structure and organizational makeup of the KB, and recommend features. One category is Design and Development of Online Courses, since the S.O.L.I.D. group will be developing content for this category and can cooperate in this effort. The other category is at the discretion of the work group. Group members: Mike Summers, Sallie Ives, Ray Purdom, Brenda Shaw, John Felts.

**Workplace Design and Development Group:** This group will explore the use of the portal for cooperative planning and decision-making, and to provide a common workplace for document sharing, work flow, project reporting, etc). This is really work around the current Collaborative Projects feature on the TLT menu, and will provide the requirements for the next phase in this development. The group will explore a real-world work area - Patti suggested evaluation of learning environments, which would also map nicely with the S.O.L.I.D. team. Group members: Steve Breiner, Mike O'Kane, Margaret Mertz, Patti Turrisi, Tun Nyein.

**Interface and Portal Operability Group:** This group will review and refine the overall portal interface, explore usability issues and needs, define and prioritize customized services, research best practices in portal design, and help to ensure non-duplication by minimizing in-house where there are effective alternatives (for example, egroups.com may provide a set of resources for group work). Members: Chris Weaver, Steve Breiner, Mike O'Kane, Paul Brinich, Hillisha Haygood.

### **VIRTUALSCAPE MIGRATION**

The TLT Portal has been migrated from the UNC CH School of Public Health to an independent ISP (Virtualscape). The migration took place over the Christmas holiday break and has gone very well. Current issues associated with the migration are as follows:

1. Fields set to Null are currently pointing to random memory locations, which generates garbage content. Paul is working on this with the Virtualscape staff.
2. Text fields have a restrictive size limit and this effects our ability to use our tables for very large text entries. This mainly effects the Content Authoring Engine, so end users are not likely to impacted. Current solution is to directly populate these fields in the table. Paul is work with VS staff to remedy this.

3. Date fields: control user input with dropdowns (day numbers, months, years) and then use date functions to process dates as needed.
4. Domain name: we have not set a date to repoint this yet. It will take VS 2 weeks to implement.

## **PERSONALIZED QUERIES**

Paul has now coded and implemented an application that allows Knowledgebase users to save their custom queries and then access these from their portal home page. This makes it easy for example for users to search regularly for all new events and conferences or for all policies on their own campus.

## **REVISED CATEGORIES AND TYPES:**

Following discussion with Ray and John, the Categories have been removed and the types modified. We are now ready for large-scale submission of entries. The use of Knowledgebase categories will be reconsidered as the content grows, but current expectation is that this need may in fact be covered by keyword searches and the Audience search field.

## **FORMATS OF SEARCH RESULTS**

Searches can combine (AND) keyword searches with additional constraints by field. The Keyword search box will be moved to the head of the search page.

Help text should state:

“Please use any combination of keyword search and the check boxes to constrain your search as needed. You may also leave the keyword box blank and just use the check boxes.”

In general Search results will be listed alphabetically in ascending order. In the case of Conferences and Events, listing will be as follows:

Current/future events only will be listed, including all events that begin or end in the current month (even if the actual dates have passed). All previous events will be maintained in the database and will be accessible via keyword search..

## **SUBMISSIONS/NEW TYPE FIELD**

Every type needs a KEYWORD field in order to allow submitters (and coordinators) to provide keywords that can be searched on. We will consider adding an option to select (check) keywords from a list also, and tie this with emerging IMS standards where these can be applied.

## **SUBMISSIONS PROCESS**

Paul worked through a proposed revision of the Submission process - six steps. After discussion we also concluded that only people who have accounts can submit material to the Knowledgebase. No anonymous submissions are allowed

The six screens are to be implemented as follows:

1. Welcome blurb, tips. Option to show this again or bypass the page in future. We decided that this page should be “force-reactivated” for all users (including those who had asked not to see it again) when we need to display a special announcement, for example to let everyone know of a down time or of a major change to the interface/functionality.
2. Submitter Information. By making this the second page, we can let users cycle through the remaining pages without having to come to this page more than once in their submission session. (Previously page 5). This will have a CANCEL option which brings people back to their home page. People must complete required fields in order to be able to submit. A SUBMIT button moves them to page 3. **NOTE THAT THIS PAGE SHOULD BE USABLE IN OTHER PARTS OF OUR PORTAL WHERE WE WANT USERS TO IDENTIFY THEMSELVES IN MORE DETAIL.**
3. Select the Type that you wish to submit to. As before. This screen will have a CANCEL button to return to the home page. Users can use the browser Back button to go back to previous screens if they wish. A SUBMIT button moves them to page 4.
4. Content Information. This page displays the content fields for the requested type. All required fields will be marked. We need to determine appropriate error handling. Where possible we will provide drop downs to minimize user entry errors. We will also add Help popups. I will provide the text. A CANCEL button will return users to the TYPE entry page. A SUBMIT button moves them to the next page.
5. Document Status. This indicates the tracking information concerning the submission. Title and Description, who submitted the material, the date of submission, the status (pending/approved/disapproved/deleted), etc. Paul designed this page to be modular so that it can also be used when people are looking up the status of a document in order to review and approve/disapprove. A CANCEL button allows users to cancel their submission at this time and return to the TYPE entry page. A SUBMIT button moves them to the next page.
6. Confirmation. This page indicates whether the submission was updated successfully. A button is available to **VIEW THE SUBMISSION** (separate browser window?). Other buttons are **SUBMIT ANOTHER ENTRY** (returns to TYPE Screen) and **RETURN TO PORTAL HOME PAGE**.

When people choose to **MANAGE** the KB they will also use these pages..

## USER TYPES

Paul and Hillisha were not aware of the work that we did last fall on USER TYPES. These are as follows and will be implemented to allow appropriate levels of access to the Knowledgebase.

KnowledgeBase management tools allow individuals with special privileges higher levels of control over Knowledge Base content and Portal accounts than public users. The TLT Portal provides the following levels of access:

**NO-ACCOUNT USERS** are people who simply come to the TLT site and choose to search the KnowledgeBase. They do not have accounts, and cannot submit entries.

**REFERRED USERS** are simply entries in the People table that have not requested or received user accounts. These entries will usually have been entered for lookup purposes as part of the KnowledgeBase People type. Referred Users have no access to the Portal, unless they request one themselves in which case they become Public Users..

***NOTE: All following user levels have accounts to use the portal. All users with accounts are included in the People table. All account users who submit materials and perform management functions must have completed all required fields in the People table for tracking purposes.***

**PUBLIC USERS** may submit materials and set personal preferences, and modify their own account information.

**APPROVED USERS** may submit materials and approve, modify or delete any materials **that they themselves have submitted**. These are essentially trusted users, and are expected to include staff of teaching and learning centers, etc. Approved Users have all rights of Public Users.

**KNOWLEDGEBASE COORDINATORS** may submit materials and may approve, modify or delete any materials in the Knowledgebase. These are the people who will manage and maintain the overall content and ensure that the Knowledgebase remains vibrant and relevant. This authority includes approval, modification and deletion of People entries in the Knowledge Base but does not include management of ID's and passwords of account . Knowledgebase Coordinators have all rights of Approved Users.

**WORPLACE COORDINATORS** are individuals who have requested and been granted authority to manage a community workplace or project site. This application is still under development and details will be published at a later date.

**SYSTEM ADMINISTRATORS** have all rights of Managers, and can also manager user ID's and passwords, create and modify tables and applications, etc.

## **DUPLICATE ENTRIES**

Checking for duplicate entries will be a responsibility of the Knowledgebase coordinators.

## **COMMUNITY WORKPLACES/PROJECT SITES**

Once we have made this round of changes to the Knowledgebase we will review the Projects sites and redesign these as Community Workplaces. While the Knowledgebase provides a shared resource for knowledge sharing, the Community Workplace provides work areas and reporting sites for project teams, committees, work groups, and other targeted group activities. Some immediate design issues:

We need to define rules for the ordering and naming of Workplace sites so that each site can be found quickly and efficiently.

We need to define the process to request a workplace. Plan is to apply an automated process (checkboxes) to request any/all of the following components that are appropriate to the specific workplace:

- Title
- Abstract/Description
- Audience scope
- Required Menu items – a subset of:
  - Details
  - Meetings
  - Members
  - Status Reports
  - Results and Outcomes
  - Reference Materials
  - Final report
  - Chat
  - White Board
  - Listserv
  - Feedback

Links to each workplaces will be automatically added to the Knowledgebase.

Pilot work will continue in the spring, with full implementation beginning in the summer.

## **PORTAL FRONT END**

We will work with the PDP team to review and develop this with planned implementation phase beginning in the summer.

## **CAMPUS-CENTRIC PORTAL INTEGRATION**

We have begin to discuss ways in which UNC campus organizations (and potentially any organization) can attach to the TLT portal while retaining its own brand. We see three options:

**Simple:** Organization will develop custom queries to generate results that are relevant to their organization, then add these queries as links from their site. Advantage is that this is easy to implement. Disadvantage is that the calls generate results under the TLT brand.

**Integrated:** Organization develops its own brand within the TLT design structure, and has its own interface to the KB, Projects, etc. Advantage: organization has its own brand on the entire site. Disadvantages: organization must fit our site design and this will require more support from us.

**Advanced:** Organization programs its own interface that includes access to our database/tables, and may make use of some code segments. Advantages: encourages good modular application design on our part for reusable code, also permits “open source” approach where programmers refine code for general use. Disadvantages: risks a more chaotic approach to develop (multiple versions), is more expensive, and may slow down development.

Conclusion: we need to continue discussing this but should hold off from any decisions/development until after the Retreat - summer review of campus-centric portals needs to be planned. Introduce this idea to the PDP group, specific people who may be interested are: Chuck Bennett (UNCA) and Bob Orr (WCU).

## **DEVELOPMENT TEAM - PERSONAL SKILLS/INTERESTS.**

James Bossert recently left the TLT development team for a position at NC State. He will be missed. Paul Brinich and Hilisha Haygood have done an excellent job of filling the gap. At this time there is no plan to replace James, although this may be reviewed.

Paul has a strong interest in JSP and is developing skills there. Hillisha is developing her skills in ASP. Both are skilled in CF and have good skills with Oracle and MS SQL. I believe that current development will tend to be towards more ASP, but we will stick with CF for the moment and look for targeted opportunities to develop in XML/ASP and perhaps XML/JSP. Hillisha is interested in having more opportunities to design/develop applications, (all stages from needs assessment, through surveys, product design and application development).

Paul and Hillisha are working together on development. I will forward requests to both and let them work through who does what. We will also consider hiring someone (student) to do some of the content upload work at a lower (\$10-12 hourly) rate. This person would convert docs to PDF, upload files, enter KB submissions, set up projects and modify menu entries, etc. Person could also provide help desk services.

We also need to identify people to perform specific services, for example an Assistive technology expert to review our ADA compliance beyond Bobby compliance. Also a usability expert (I think that the PDP team will provide this service).

Useful reading - Jacob Nielsen: designing Web usability