Matrices Tool: Key Differences between IU Branch and OSP 2.6

Prepared by Lynn Ward, March 2009

Summary of Changes/Differences	IU	2.6
Permissions		
Revised tool-level permissions	x	
Addition of matrix-specific permissions	x	
Cell-level control over evaluator/reviewer access	x	
Hide evaluations from participants	x	
Reviewer/evaluator group access	x	x
Group filtering	x	x
Guidance		
Addition of Rubric and Expectations fields	x	
Hide/show behavior in end-user view	x	
Contextual cues for guidance (SAK-11447)		x
Portfolio Aware Linking		
Manage site associations	x	
Link assignment to cell(s)	x	x
Link wizard page to cell(s)	x	
Link matrix cell to cell(s)	x	
View items linked to this cell	x	
Evidence Area		
Area label changed from "Evidence" to "items"	x	
"Add other evidence "label revised to "attachments"	x	
Now uses "attachments" helper; user uploads directly or makes a copy of an item in resources	x	

Summary of Changes/Differences	U	2.6
Changed link anchor from "Add formname (sitename)" to "Complete formname (sitename)"	x	
Removed ability to "select existing" forms	x	
Dropped sitename from link anchor for local forms		x
Change button label from "Submit cell for evaluation confirmation" to "submit for evaluation"	x	
Allow participants to open and view completed forms in separate window (form name is a hyperlink)		x
Reflection Area		
Remove reflection		x
Edit/delete icons replaced with links		x
Feedback		
Request feedback button w/ email notification	x	
Student initiated feedback requests (can be sent to any registered user)	x	
New feedback notifications for participants	x	
Edit feedback		x
Remove feedback		x
Feedback options (number of general and item specific feedback items permitted)		x
Contextual cues for audience selection		x
All Edit/delete icons replaced with links		x
Evaluation		
Email notifications for participants and evaluator	x	
Edit evaluation		x
Remove evaluation		x

Summary of Changes/Differences	IU	2.6
Contextual cues for audience selection		x
Matrix Authoring		
Default cell settings (evaluators, reviewers, forms, etc.) in matrix properties	x	
No "preview" mode	x	
In Matrix Properties and Edit Cell, renamed Form to "Custom Form"	x	
Changed text in edit cell view from "Suppress Evidence Attachments" to "Disable participant attachments"	x	
Edit Matrix name after publishing		x
Apply OSP Style to more screens		x
Move some Matrix styling to CSS		x
Feedback options (number of general and item specific feedback items permitted)		x
Miscellaneous		
Removed ability to "edit" in aggregated Matrices to improve performance	x	
New "Returned" status	x	

Permissions and Access Control

Summary of IU Changes: At IU, we support many different portfolio projects and each project leader has rather specific requirements for restricting or opening access to individuals cells and the actions available therein. In modifying the permissions structure of the Matrices tool, we've tried to accommodate a wide range of access scenarios from open and collaborative to locked-down and private. Several mechanisms are used to determine what each user can see and do in the Matrices tool.

1. **Tool and Matrix-level Permissions**: In addition to the tool-level permissions, which have always been available, each matrix has its own permissions configuration. The tool level permissions are primarily concerned with matrix authoring and management, whereas the permissions associated with a specific matrix determine what each role can do within the matrix.
2. **Groups:** Groups determine which names are displayed in the "Select User" drop down menu. By default, users with permission to view the member only see users in their own groups. This restriction can be turned on or off on a per role/per matrix basis via the "Can view all groups" permission.
3. **Cell-level settings:** Permission and group settings affect the entire matrix, but for some projects, it's important to be able to control access and behavior in specific cells. As an example, we support several projects where evaluators and reviewers are only permitted to view those cells and students to which they've been assigned. We accommodate the need to enable/disable access or specific actions on a per cell basis via cells specific settings.

Tool Permissions

IU Branch

Figure 1: Matrix Tool Permissions, IU

OSP 2.6

Figure 2: Matrix Tool Permissions, OSP 2.6

Matrix-Specific Permissions

IU Branch

Figure 3: Matrix-Specific Permissions, IU

Notes:

1. "Can view / access all matrix cells" allows the user to open and view any cell for any user visible in the "select user" list, regardless of cell-specific evaluator/reviewer designations.
2. If "Can view evaluations/feedback created by another user" is off, the name of saved eval/feedback forms are displayed as plain text instead of links.
3. If "Can view /access user list and cell owner" is turned off, reviewers and evaluators must user other means (e.g., Evaluations tool or direct link n email notification) to view and complete feedback or evaluation forms in the cell.

OSP 2.6

Not applicable

View All Groups and Filter by Group (Duplicate Functionality)

IU Branch

The ability to view all members of all groups in the Select user dropdown is provided via the "Can view all groups" permissions in the matrix-specific permissions and can be applied to any role.

Users with access to multiple groups can filter the user list by group.

Figure 4: Filter by Group, IU

OSP 2.6

By default, users can only see members of their own groups. A setting in Matrix properties gives Reviewers and Evaluators the ability to see all users.
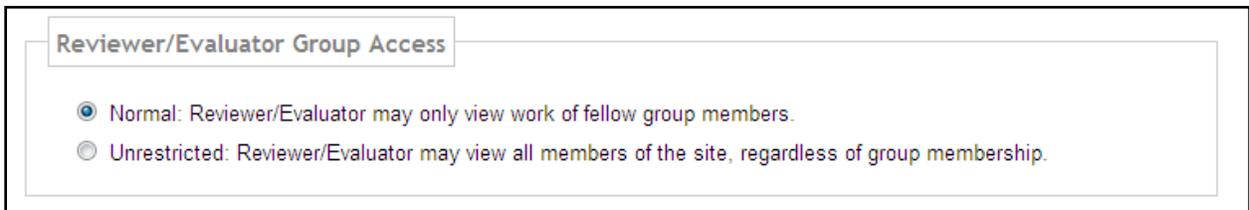

Figure 5: Reviewer/Evaluator Group Access, OSP 2.6

Notes:

This setting affects any role that would normally see the dropdown menu, including participants and coordinators if they have either the review or evaluate permissions. There is no way to give to one role without giving to all who can view the drop-down.

Users with access to multiple groups can filter the user list by group.
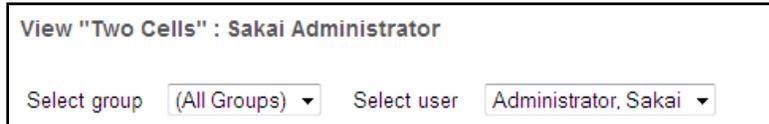
Figure 6: Filter by Group, OSP 2.6
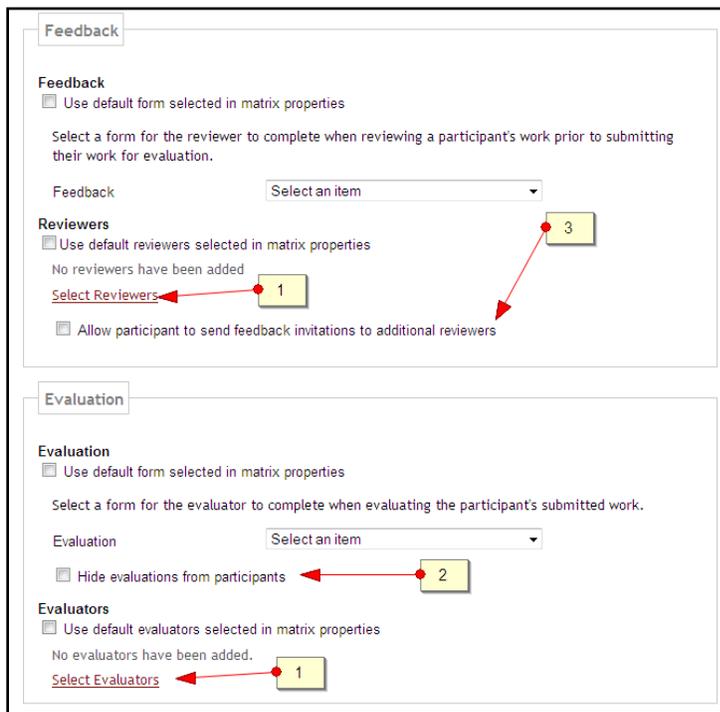

Evaluator and Reviewer Designations and Other Cell-Level Settings

IU Branch

1. The ability to open and add a review or evaluation to a cell is determined by the reviewer and evaluator selections within the cell (or within Matrix Properties if the cell uses the matrix default settings).
2. Cell-level settings also determine whether participants can see the evaluations of their work (sometimes evaluation is strictly for program assessment/improvement and not intended to be shared with students) and
3. Whether participants can select and invite others to review their work.

Figure 7: Edit Cell, Cell-specific Settings, IU

8

OSP 2.6

In OSP, reviewers and evaluators gain access to all cells of the matrix via the "review" and evaluate" permissions for the Matrices tool. The evaluator selections within each cell determine whether that role or person sees the pending cell in the Evaluations tool. It has no effect on who can open or add an evaluation to the cell in the Matrices tool.

Guidance

IU Branch

The IU branch includes two modifications to cell guidance:

1. The addition of two new guidance fields, **Rubric** and **Expectations**
2. Replacement of the expand/collapse widget for each guidance field with a hide/show toggle link that hides or shows all guidance with one click.
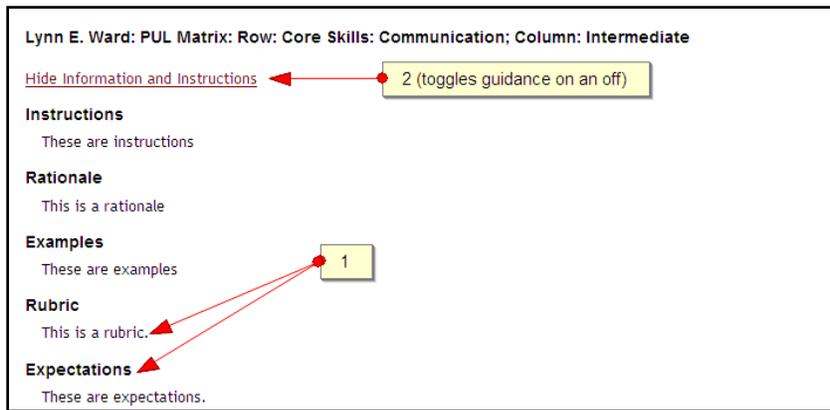

Figure 8: Guidance, IU

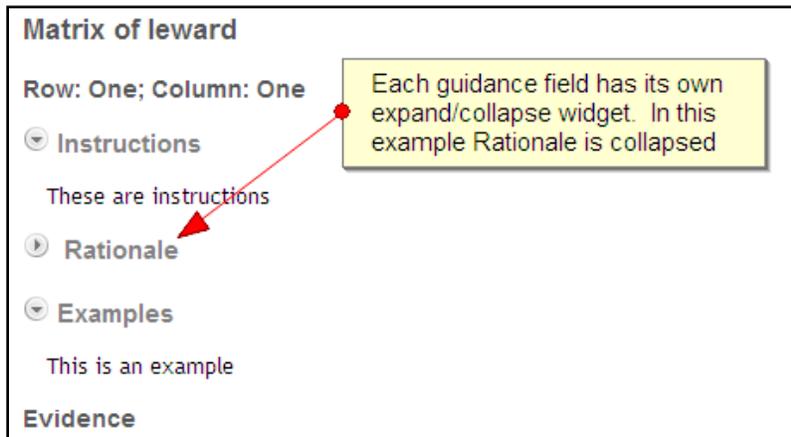### OSP 2.6

Figure 9: Guidance, OSP 2.6

Linking Assignments and Other Items to Matrix Cells

Assignment Linking (Duplicate Functionality)

IU Branch

Building on the ideas from Syracuse's goal management tool, in the IU branch, Matrices function as an assessment framework that can accept links from other portfolio-aware tools (currently Assignments, Matrices, and Wizards) in other sites. When a student submits a linked item, their submission automatically populates the matrix cell.

1. The process begins by the portfolio administrator associating a course, project , or portfolio site with the Matrices tool:

Figure 10: Manage Site Associations Link, IU
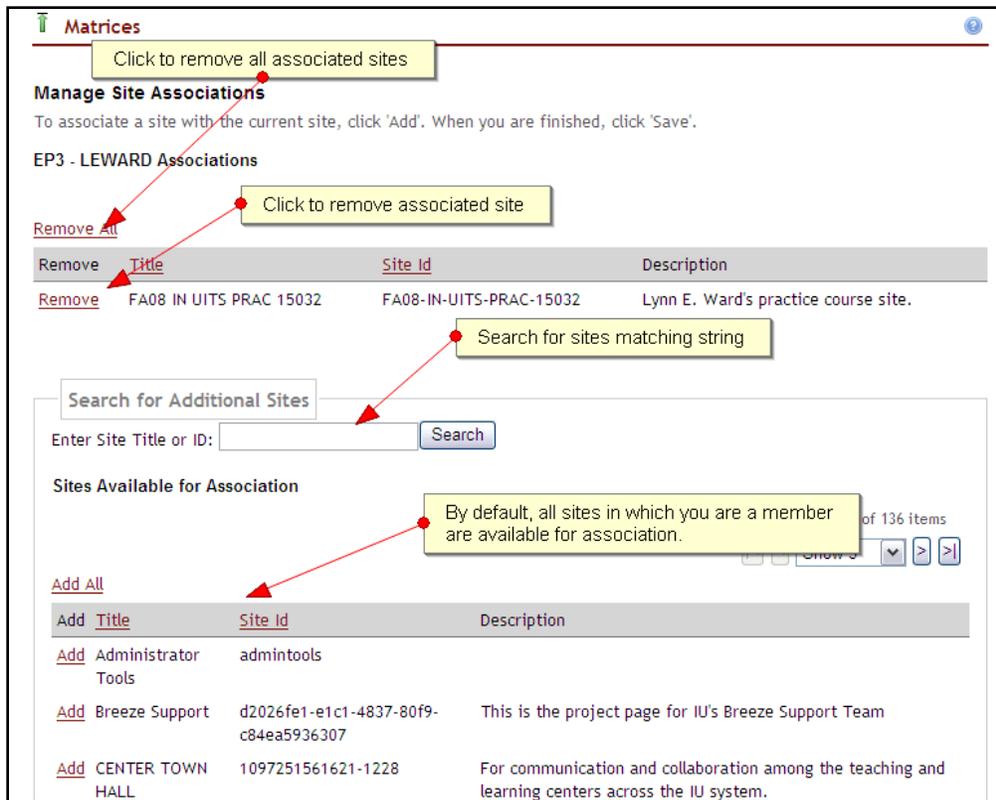
Figure 11: Manage Site Associations Screen, IU

2. Once the site has been associated with the Matrices tool, the "Create/Edit" Matrix Links" widget appears in portfolio-aware tools.
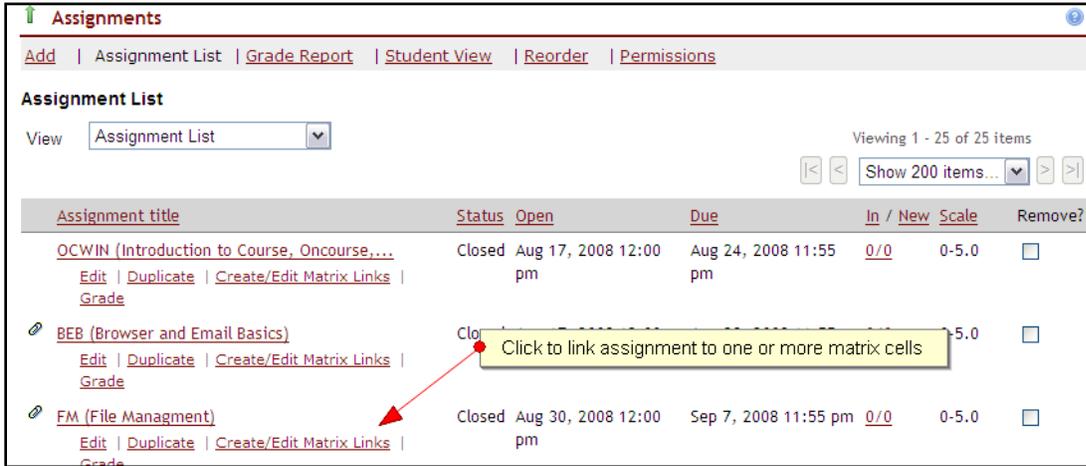

Figure 12: Assignments: Create/Edit Matrix Links, IU

Figure 13: Edit Cell, Create/Edit Matrix Links, IU

Figure 14: Wizards: Edit Wizard Page, Create/Edit Matrix Links, IU

3. After clicking the "Create/Edit" Matrix Links", the user is instructed to select an associated portfolio site from a dropdown menu:
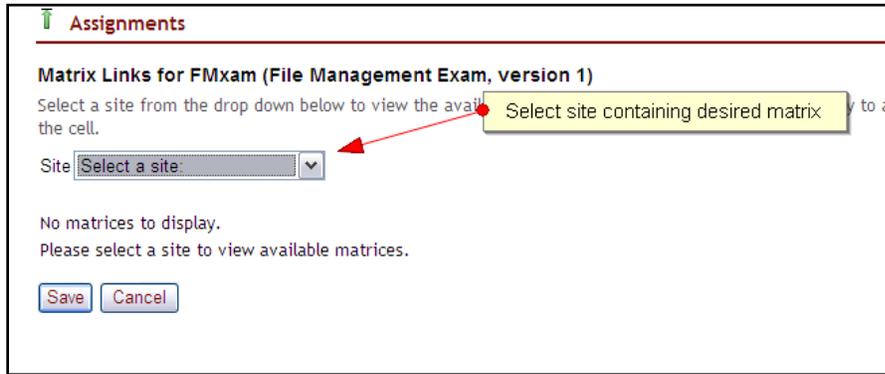

Figure 15: Assignments Create/Edit Matrix Links, Select a Site, IU

4. Once a portfolio site has been selected, the Matrices in the site are rendered with checkboxes in each cell. Selecting a checkbox creates the link.

Figure 16: Assignments: Create/Edit Matrix Links, IU

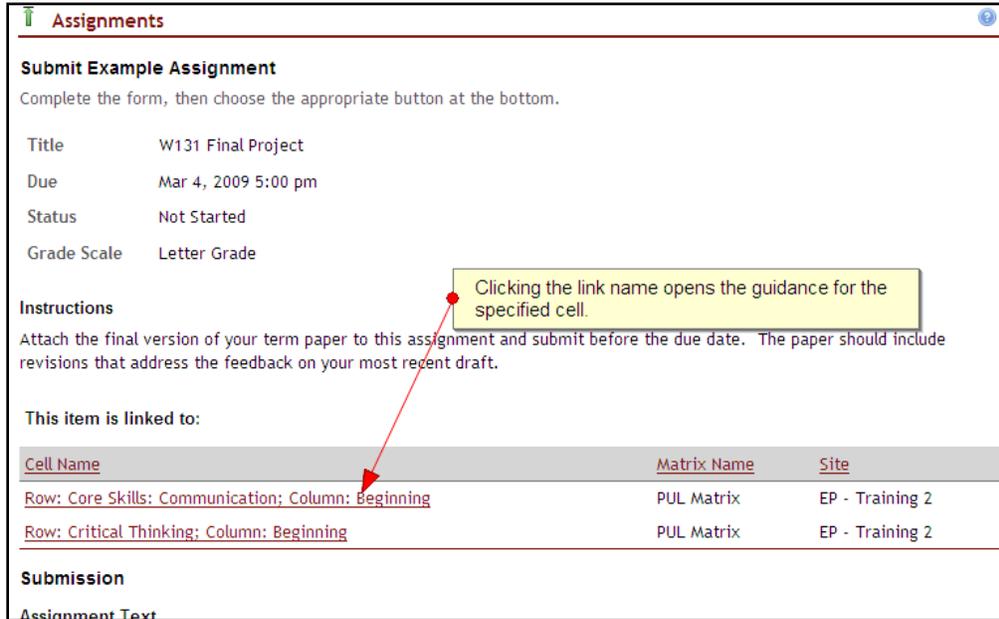5. Information about the links displays in the assignment:

Figure 17: Assignments: Student View of Links, IU

6. When the student submits the assignment, it appears in the evidence area of the student's matrix cell:
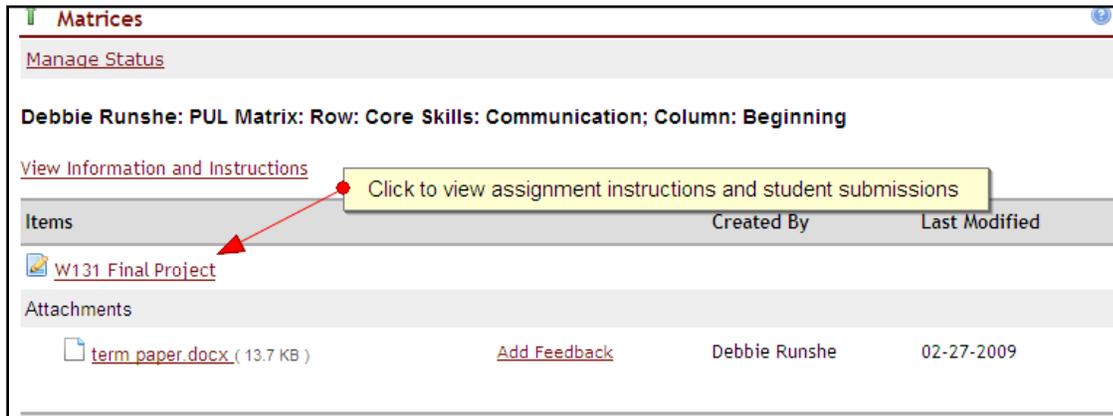
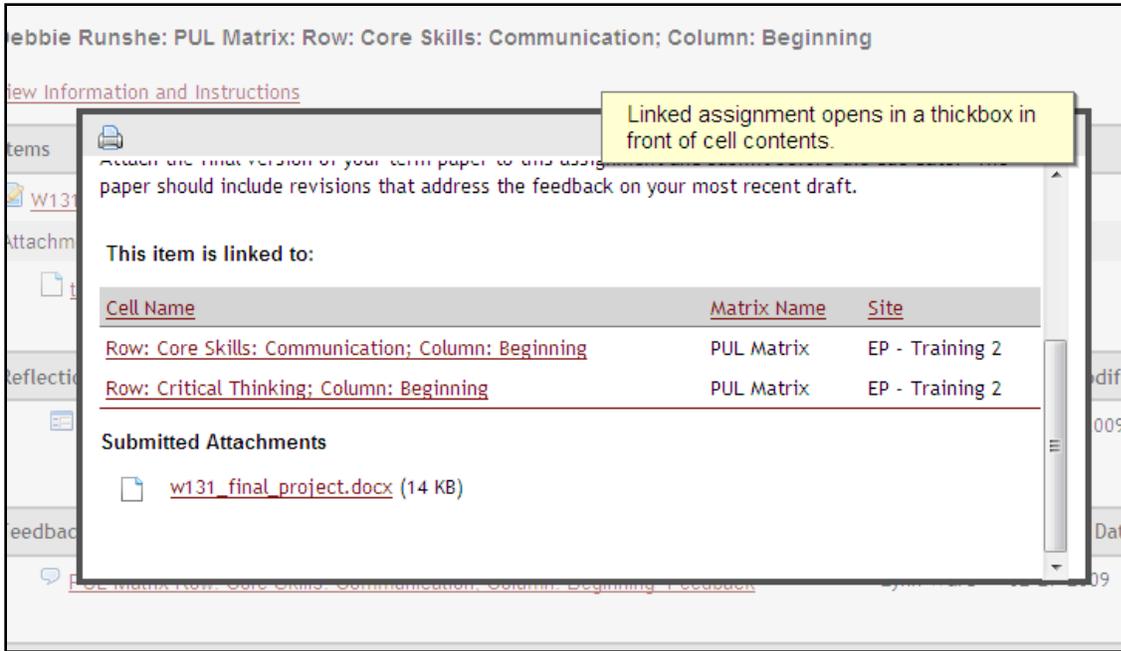

Figure 18: Cell with Linked Assignment, IU

Figure 19: View Linked Assignment, IU

7. The portfolio site administrator can see the items linked to a cell by clicking "View Items Linked to the Cell" at the top of the "Edit Cell" view:
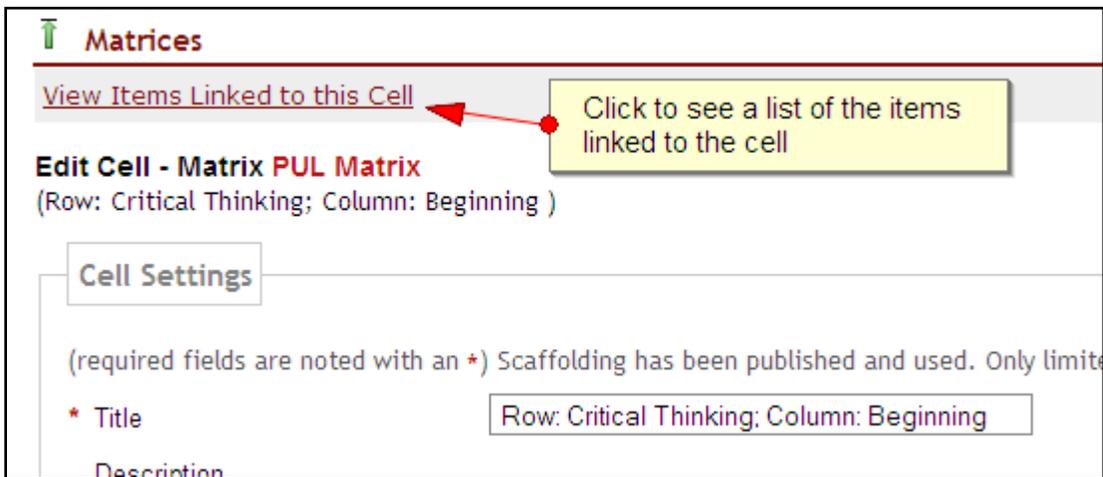

Figure 20: Edit Cell: View Items Linked to this Cell, IU

Figure 21: Edit Cell: List of Linked Items, IU

OSP 2.5/2.6

OSP 2.5/6 includes the ability to link a matrix cell to an assignment, with a result similar to IU's assignment linking—the submitted assignment appears in the student's matrix. This linking behavior was limited to assignments in the same site as the matrix.

1. In the Edit Cell screen, click "Manage Assignments"

Figure 22: Matrices: Edit Cell, Manage Assignments, OSP 2.6

2. Select the desired assignment from those available in the current site:

Figure 23: Manage Assignments

3. When the student submits the assignment, it appears in the cell:

Matrices: Evidence Area of Cell

Cosmetic Changes to the Evidence Area of the Cell

IU Branch

The IU branch includes several minor cosmetic changes to the Evidence area of the cell and one major change, which are summarized below:

1. Changed the name for this area of the cell from "Evidence" to "Items"
2. Changed link anchor for attaching artifacts from " Add Other Evidence" to "Add Attachment(s)"
3. Changed label for submit button from "Submit cell for evaluation confirmation" to Submit Cell for Evaluation".
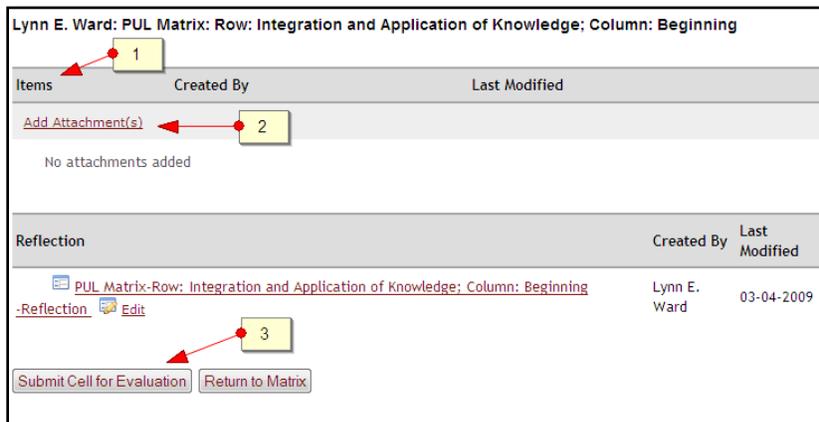
Figure 24: Evidence Area, IU

OSP 2.6

For comparison:
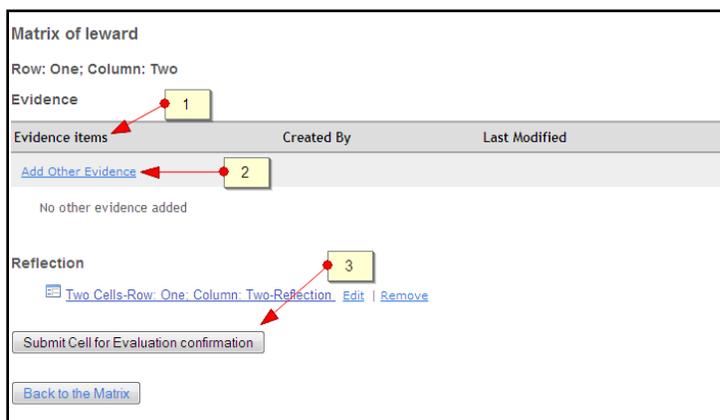
Figure 25: Evidence Area, OSP 2.6

Handling of Participant Forms

IU Branch

In the IU branch, several changes were made to the handling of the participant form. Changed link anchor from "Add *formname*" to "Complete *formname*"

1. Removed ability to "Select Existing" forms
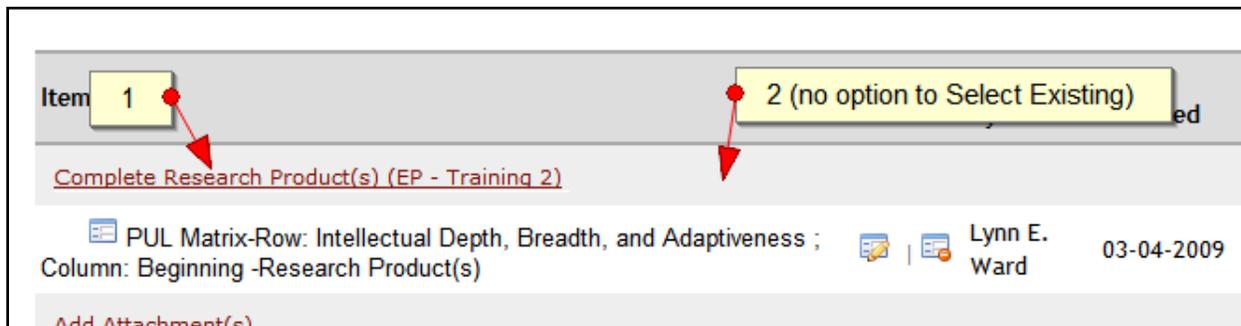
Figure 26: Participant Form, IU

IU intends to revert back to the OSP/Sakai -approach to presenting and managing participant forms in the merged code.

OSP 2.6

OSP 2.6 introduces three changes to the handling of participant forms:

1. Non-global forms no longer include the site name following the form name.
2. Completed form appears as a link that can be opened in a new window.
3. Edit and remove icons replaced with text
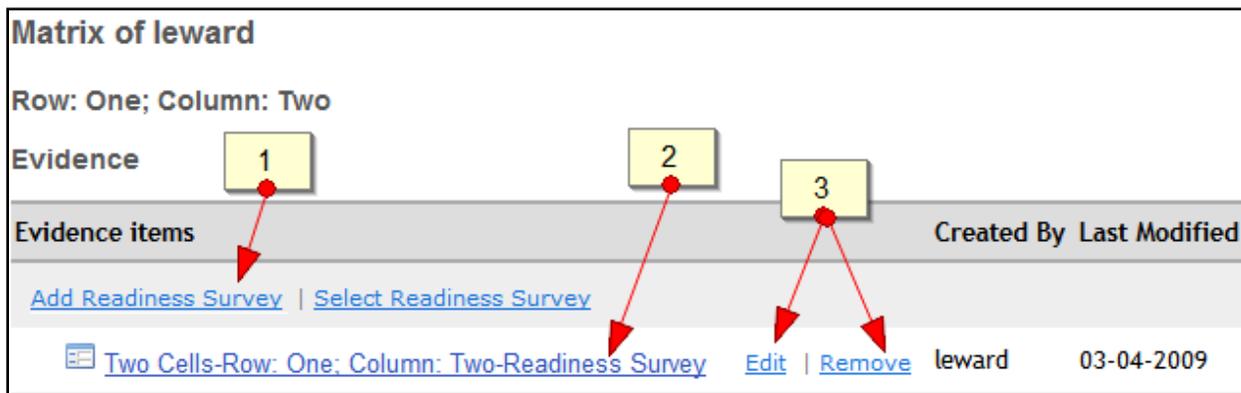
Figure 27: Participant Form, OSP 2.6

Handling of Attachments

IU Branch

In the IU branch, when files and other items from Resources are added to the cell, the Attachments Helper is used to make a copy of the file rather than linking to an original in Resources. This has two benefits:

1. Reduces clicks for uploads directly from the desktop.
2. Reduces scrolling when there are a large number of files in Resources ("Continue" button in two places)
3. Eliminates the need to lock files in My Workspace > Resources, which can be a problem if students want to reorganize their space.

Figure 28: Add Attachment, IU

OSP 2.6

For comparison:

Figure 29: Add Other Evidence, OSP 2.6

19

Matrices: Reflection

IU Branch

No change (OSP 2.5 behavior)

Figure 30: Reflection Area, IU

OSP 2.6

Two changes introduced in OSP 2.6:

1. The ability to remove a reflection
2. Edit and remove icons replaced with text
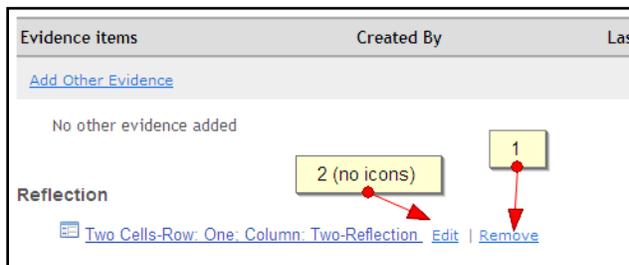
Figure 31: Reflection Area, OSP 2.6

Changes to Feedback and Evaluations

IU Branch

The IU branch includes several changes that enhance the feedback and evaluation workflow:

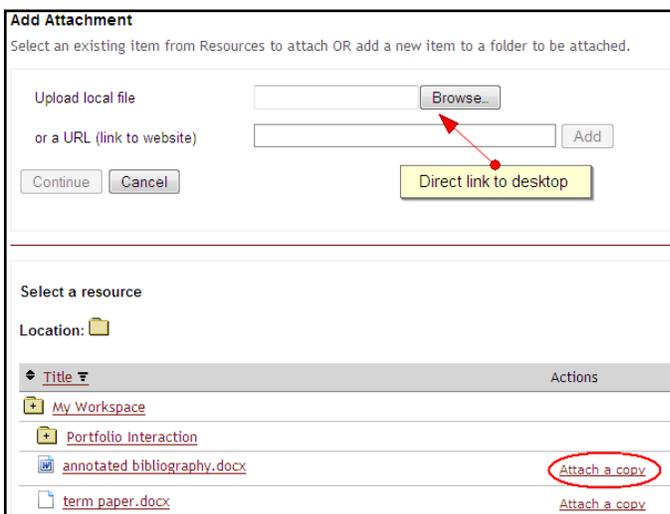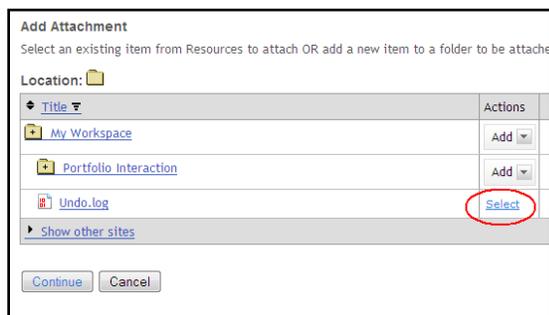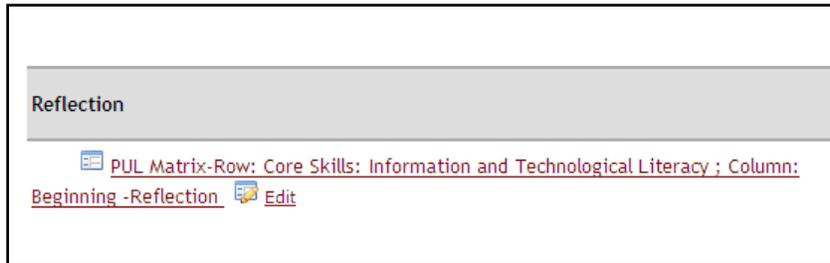1. A "Request Feedback" button appears on each cell. If students are permitted to invite reviewers, clicking the button allows the participant to select reviewers and optionally draft a personal message. An email notification is sent to the selected reviewers.
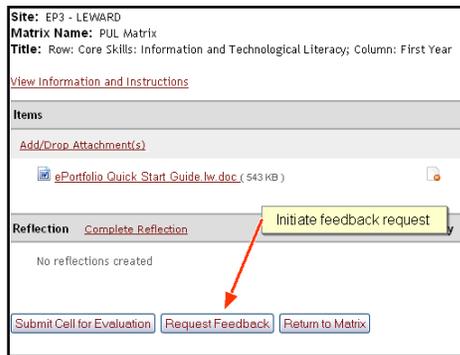
Figure 32: Request Feedback, IU

2. When the participant submits the cell, the evaluator(s) for that cell receive an email notification. Notifications are only sent to evaluators in the same group(s) as the cell owner.
3. When a new evaluation or feedback has been added to a cell, the cell owner receives an email notification.

OSP 2.6

OSP 2.6 also introduced several changes affecting feedback and evaluations:

1. In Matrix Properties, options for controlling the number of general and item-specific feedback items per cell.
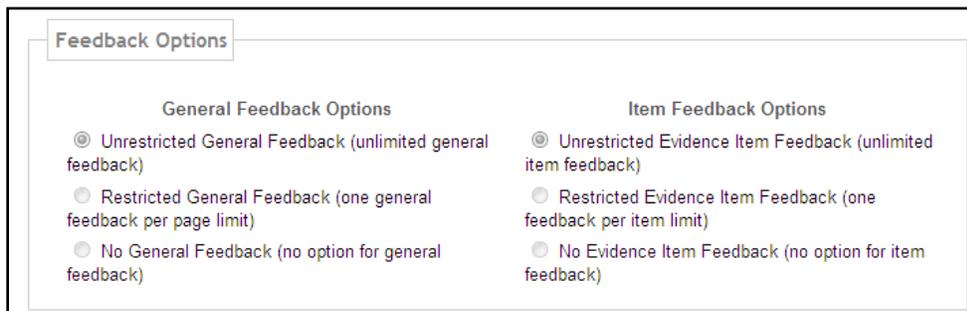
Figure 33: Matrix Properties, Feedback Options, OSP 2.6

2. Existing feedack and evaluation items can be edited or removed.

Figure 34: Edit/Remove Feedback, OSP 2.6

Matrix Authoring

IU Branch

IU introduced some cosmetic and functional changes to the matrix authoring. The cosmetic changes are as follows:

1. In Edit Cell screen, changed text in edit cell view from "Suppress Evidence Attachments" to "Disable participant attachments"
2. In edit cell view, renamed Form to "Custom Form"

The two functional changes are:

1. Elimination of the "Preview" link when a new matrix is created. Matrices are immediately previewable.

2. The ability to define "default settings" in matrix properties for form selections, reviewer/evaluator selections, and other cell-specific settings. By default, all cells in a new matrix inherit these default settings. But it's also possible to override them in any cell. The default settings area of the Matrix Properties screen is shown below:

Participant Forms

The following forms will be the defaults for all cells. Defaults can be overridden on a per cell basis.

Custom Form(s)

Select one or more custom form(s) to be completed by participants when submitting their work.

Custom Form   [Select a form ▼] [Add]
    No forms added.

Reflection

Select a form for participants to use to reflect on the item they are submitting.

Reflection   [Reflection-Standard ▼]

Feedback

The following forms will be the defaults for all cells. Defaults can be overridden on a per cell basis.

Feedback

Select a form for the reviewer to complete when reviewing a participant's work prior to submitting their work for evaluation.

Feedback   [Feedback-Standard ▼]

Reviewers   Add Reviewers
    No reviewers have been added

☑ Allow participant to send feedback invitations to additional reviewers

---

Evaluation

The following forms will be the defaults for all cells. Defaults can be overridden on a per cell basis.

Evaluation

Select a form for the evaluator to complete when evaluating the participant's submitted work.

Evaluation   [Evaluation-Standard ▼]

☐ Hide evaluations from participants

Evaluators

1. coordinator (Role)
2. evaluator (Role)
3. participant (Role)

Select Evaluators

[Save Changes] [Cancel]

Figure 35: Matrix Properties, Default Settings, IU

23

Participant Forms

Custom Form(s)
☑ Use default form(s) selected in matrix properties

No forms added.

Reflection
☑ Use default form selected in matrix properties

☐ Reflection-Standard

Feedback

Feedback
☑ Use default form selected in matrix properties

☐ Feedback-Standard

Reviewers
☑ Use default reviewers selected in matrix properties

☑ Allow participant to send feedback invitations to additional reviewers

No reviewers have been added

Evaluation

Evaluation
☑ Use default form selected in matrix properties

☐ Hide evaluations from participants

☐ Evaluation-Standard

Evaluators
☑ Use default evaluators selected in matrix properties

1. coordinator (Role)
2. evaluator (Role)
3. participant (Role)

Figure 36: Edit Cell, Options to Use or Override Defaults, IU

OSP includes some matrix authoring fixes enhancements not available in the IU branch:

1. The ability to edit the matrix name after the matrix has been published.
2. The ability to apply OSP styles to Matrix view as well as individual cells.
3. Inline hardcoded styles moved to the eport.css so they can be overridden
4. Options for controlling feedback, described previously under the feedback section.

Matrices: Miscellaneous

IU Branch

Two other changes in the IU branch that didn't readily fit under other categories are as follows:

1. The addition of a new "Returned" status intended for cases in which the evaluator re-opens a previously submitted cell for a participant following evaluation:
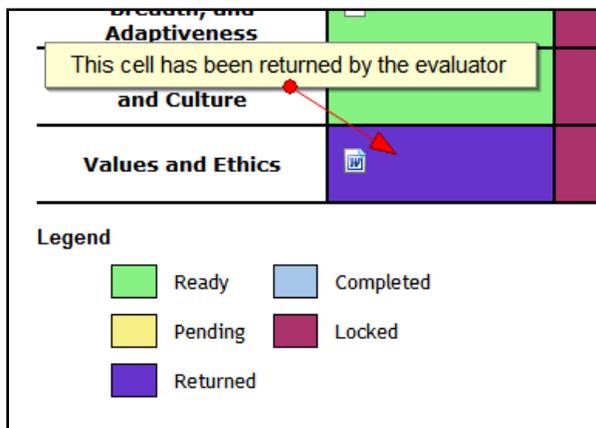

Figure 37: New Returned Status

2. Removal of the ability to edit matrices in the Aggregated Matrices view. Determining permissions too much time when the user belonged to multiple portfolio sites.

Figure 38: Aggregated Matrices, IU