

# 3. Manage Site Settings

## 1. Site Home Page

### 1. Site Settings

Link available in the dashboard view of a site. The link itself brings you into the first tab, the dropdown menu brings you into a particular section of the Site Settings.

### 2. Site Settings - General

★ Note: A change to Site and possibly SiteService is required to allow the setting of Site Owner (site.getCreatedBy()), otherwise this would be 4 hours effort at worst, after talking to Ian we are going to handle this using some hacking and cheating to avoid thawing kernel

ToDo :

Domain	Description	Work Estimate
Technical	Saving all of the data on the page	32 hours
Data Feed	Data Feed that allows updating a sites Site owner (createdBy), Site name (title), Site description (shortDescription, description), Status (published), Public/Private (pubView) and Default Role (joinerRole)	16 hours ★
		<b>Total: 32 hours</b> (Incomplete est.)

## Site Settings

[Help](#) | [Close & Return to Joe's New Site](#) x

General
Members
Roles & Permissions
Site Backup & More

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### Summary ★ = Required Information

Site Owner: **Joe Instructor** [Edit](#) 1

\*Site Name:

Site Description:   
(Max 80 characters)

Site ID: X9802-B560R1 [What is this?](#) 2

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### Site Status

**Current Status:**  Active (Available)  Inactive (Unavailable)  
If you want users to find and join your site, select "Active". Otherwise, select "Inactive" to completely hide and prevent anyone from accessing your site.

**This Site Is:**  Public  Private  
Select "Public" if you want anyone to join your site. Select "Private" to allow only the users you've invited to join.

**Member's Default Role:**  3 [What does this mean?](#)

Save
Undo Changes



## 1. Site Owner

We envision this to be someone who is responsible for the site. For now, this will pop-up a lightbox screen which will allow you to pick someone from the member list and make him the site owner. If there is no site owner, we pick someone from the list of maintainers, if there is no maintainer, we pick the Sakai Administrator (uses feed from above)

ToDo :

Domain	Description	Work Estimate
Feedback	Gather feedback from institutions to see whether this 1 owner approach would work	8 hours
Design	Design the lightbox that shows the list of users and lets you pick one	8 hours
Technical	Implementation	24 hours
		<b>Total: 30 hours</b>

## 2. Site Id

The site id will be shown inside the url of the webpage. The site id cannot be changed at this point anymore.

## 3. Member's Default Role

We rename this to: All new members become

## 3. Site Settings - Members

Note that currently `getMembers()` returns all user ids with no sorting or paging ability. This tends to be turned into a huge list of Participant or User or whatever is desired. Suggest sending all users for now and sorting in javascript OR implementing a sorta REST interface which is somewhat inefficient but can improve when the Sakai code improves (reduce the estimate if page/sort is deemed unimportant)

Notes: The last login is stored in a table and uses a listener, structure like so: `UserId, Time, SiteRef`. The `SiteRef` is null if it indicates the last login to the system, otherwise it is the last access to the site, probably would require a set of observers to keep the table up to date.

The feed here would need to pull all memberships for the site and then include that total count in the data returned. It would also need to respond to the page and perpage get variables and respond to sort options as well.

This will be built into the existing membership feeds here: `/direct/membership/describe` (code in the core-providers in EB)

ToDo :

Domain	Description	Work Estimate
Data Feed	Feed that gets the list of members for a site, including username, email, last login, role and status. Also make this feed pageable and sortable	16 hours
		<b>Total: 16</b>

# Site Settings

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General **Members** Roles & Permissions Site Backup & More

+ Add Members 11

## Members 1

Select All | 2 Select All Visible | Unselect All | 0 Selected

300 Records Total | View 10 Per Page 2 | Prev Page 1 of 30 | Next

<input type="checkbox"/>	Members <span>3</span>	Email <span>4</span>	Last Login <span>5</span>	Role	Status
<input type="checkbox"/>	<a href="#">Joe I. Instructor</a>	<a href="mailto:joe@sakai.university.edu">joe@sakai.university.edu</a>	March 29, 2008 @ 1:23 PM	Owner	Active
<input type="checkbox"/>	<a href="#">Mike A. Smith</a>	<a href="mailto:msmith@yahoo.com">msmith@yahoo.com</a>	March 28, 2008 @ 3:07 PM	TA	Active
<input type="checkbox"/>	<a href="#">Jane Doe</a>	<a href="mailto:j.doe@sakai.university.edu">j.doe@sakai.university.edu</a>	March 29, 2008 @ 9:12 AM	Student	Active
<input type="checkbox"/>	Laura S. Roberts	<a href="mailto:roberts_laura@gmail.com">roberts_laura@gmail.com</a>	March 07, 2008 @ 2:25 PM	Guest <span>6</span>	Inactive
<input type="checkbox"/>	<a href="#">Erin A. Wilson</a>	<a href="mailto:thewilsones@hotmail.com">thewilsones@hotmail.com</a>	March 29, 2008 @ 2:44 PM	Student	Active
<input type="checkbox"/>	<a href="#">Ben Singer</a>	<a href="mailto:singer21@hotmail.com">singer21@hotmail.com</a>	Never	Student	Invited <span>7</span>

Update 8

Deleted Selected 9

Select a Command 10

Submit



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## 1. Select All vs Select All Visible

This is an attempt to not to make this page less to heavy to load. Select All would select all of the records in the recordset (300 here), while Select All Visible would only select the items visible on this page.

ToDo :

Domain	Description	Work Estimate
Technical	Implement this selection mechanism	8 hours
		<b>Total: 8 hours</b>

## 2. Paging

Mechanism used to page through the members. This isn't the most elegant option yet, and might need some redesigning.

ToDo :

Domain	Description	Work Estimate
Design	Look at the Fluid Pager and possible design	6 hours
Technical	Look at implementation of Fluid pager	24 hours
		<b>Total: 30 hours</b>

### 3. Members

These member names are links to a profile page of that member. This will be implemented to show a step up to the concept of social networking.

ToDo :

Domain	Description	Work Estimate
Design	Design this profile page	See comments
Technical	Implement	16 hours
		<b>Total: 16 hours</b>

### 4. Emails

When you click on this, it will try to send an email (mailto-function)

### 5. Last login

Displays the date the user has logged in the last time on the system/visited the site. There are a couple ways to get this but none are particularly efficient. It would be good to have a lastlogin stored on the user. This would use the last login table from the feeds above. Access to the data should be simple since it would just be a lookup of the membership based on the userId and siteRef.  
/direct/membership/describe

ToDo :

Domain	Description	Work Estimate
Design	Look at whether we want to display last site visit or last system visit	See comments
Data Feed	Check scalability and data availability of this last login field	4 hours
		<b>Total: 4 hours</b>

### 6. Roles

List of available roles within the site  
Feed would be simply to get the available roles and statuses OR set the role/status for a user in a site  
Add this feed to the membership provider: /direct/membership/describe

ToDo :

Domain	Description	Work Estimate
Data Feed	Data feed that changes the role/status of user(s) inside a site	4 hours
Data Feed	Include the list of available roles in site feed	4 hours
		<b>Total: 8 hours</b>

### 7. Status

Tells whether that user is currently active or inactive. If the user is inactive, the previous fields grey out. If the user hasn't logged in yet, we still keep this active/inactive field and the last login field would just say "Never".

ToDo :

Domain	Description	Work Estimate
Technical	Implementation	2 hours
		<b>Total: 2 hours</b>

## 8. Update

This button will be removed, as saving will happen automatically after making a new selection in the dropdownboxes.

ToDo :

Domain	Description	Work Estimate
Design	Design Feedback on auto-saving	4 hours
		<b>Total: 4 hours</b>

## 9. Delete selected

This would remove the selected people from the site.

This works as described in the feed description page: </direct/membership/describe>

ToDo :

Domain	Description	Work Estimate	Note
Design	Design confirmation lightbox that shows up when Delete button is being pressed	2 hours	
Technical	Implementation	4 hours	
Data Feed	Feed that allows to remove members from a site	2 hours	✓ <a href="/direct/membership/describe">/direct/membership/describe</a>
		<b>Total: 8 hours</b>	

## 10. Select a Command

This list will activate once a user is selected, and will allow you to bulk update the list of selected users (e.g. change status to active, change status to inactive, change role to x)  
The bulk update feed should already be completed in membership provider. </direct/membership/describe>

ToDo :

Domain	Description	Work Estimate	
Design	Come up with the actual commands	3 hours	✓ done
Technical	Implementation	12 hours	
		<b>Total: 12 hours</b>	

## 11. Add Members

This button activates the Add Members lightbox (see 3.4).

## 4. Site Settings - Members - Add Members

The screenshot shows the 'Site Settings' interface with the 'Members' tab selected. An 'Add Members' dialog box is open, prompting the user to provide member information. The dialog includes a text input field for usernames or email addresses, a dropdown menu for the default role (set to 'Guest'), and an optional message field. The 'Send Invitation' button is highlighted with a red circle 4.

### 1. New Members

For now, we will ask for user email addresses only, as this is most likely easily rememberable for people. This does need investigation.

We might also add some kind of search function to this screen (e.g. search for people with a first name and last name, ...).

NOTE: review the add participants helper code/work as this has already solved many of the technical issues related to lookup/resolution of users

**WARNING:** We cannot go forward with this until there are clearer requirements about how the users should be listed (by username, lastname, id order, ?) and looked up (by email, username, etc., ?) and even displayed (displayname only?, gmail style?, ?)

ToDo :

Domain	Description	Work Estimate
Feedback	Get feedback on the "add based on an email address" - approach	8 hours
Design	Design the search screen/helper	*36 hours

Technical	Get feedback on how well this search function would work combined with LDAP directories	4 hours
		<b>Total: 12 hours</b> (Incomplete est.)

\*These hours not included in totals. I recommend we stick with the email approach for now using the simple text box with line break as designed.

## 2. Default Role

This will default to the Default Role set in 3.2.

## 3. Optional Message

This optional message will be inserted into the invitation email that will be send.

**NOTE:** How should this message be handled in the feed though?

ToDo :

Domain	Description	Work Estimate
Technical	Implement optional message concept	
		<b>Total: ?</b> (Incomplete est.)

## 4. Send invitation

This will add the selected users to the site, give them the selected role and send out an invitation email.

May want to allow adding each user with a different role rather than doing all users with the same role?

Look at the new add participants stuff for tips.

**NOTE:** How should we handle the configuration of the email message?

This would be part of the memberships feed but would include an extra option for sending the email.

/direct/memberships/describe

ToDo :

Domain	Description	Work Estimate
Design	Design confirmation message + feedback message	4 hours
Technical	Implementation	16 hours
Data Feed	Feed that adds users to a site with a specified role and sends out an email invitation with a custom email message	16 hours
		<b>Total: 20 hours</b> (Incomplete est.)

## 5. Site Settings - Roles & Permissions - Modify Permissions

# Site Settings

Help | Close & Return to Joe's New Site ✕

General Members **Roles & Permissions** Site Backup & More

[+ Create New Role](#)

## Roles [What are roles?](#)

Select All | Unselect All | 0 Selected

View 10 Per Page ▼ Prev Page 1 of 30 ▼ Next

<input type="checkbox"/>	Role <span>▼</span>	Description	Created By	Status
<input type="checkbox"/>	<a href="#">Guest</a>	This role has limited permissions and can only view the site.	Campus Admin	Enabled <span>▼</span>
<input type="checkbox"/>	<a href="#">Instructor</a>	This role typically has complete permissions and can modify the site.	Campus Admin	Enabled <span>▼</span>
<input type="checkbox"/>	<a href="#">Site Owner</a>	This is the site administrator who has complete permissions to do anything.	Campus Admin	Enabled <span>▼</span>
<input type="checkbox"/>	<a href="#">Student</a>	This role has some permissions which are limited to student activities.	Campus Admin	Enabled <span>▼</span>
<input type="checkbox"/>	<a href="#">TA</a>	This role's permissions are similar to an instructor, but limited to teaching.	Joe Instructor	Enabled <span>▼</span>

Modify Permissions

Edit Role

Deleted Selected

Update Status



Site Settings Help | Close & Return to Joe's New Site

General ~~Members~~ **Roles & Permissions** Site Backup & More

Role **Modify Permissions** Help | Close Window & Cancel

Review and modify permissions for the site

Site	Pages	Site Administrator	TA	Guest
<b>General</b>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view / access "Site Settings" tab	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view / access "General" tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change site's name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change site's description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can modify site's availability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can alter public vs. private status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can define default roles for new members	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Look &amp; Feel</b>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view / access "Look & Feel" tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change site's logo	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change site's default style	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change site's default color scheme	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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As most of this is controlled by the super admin in the Realms tool, we will drop these screens for now. We might want to change the second screen so that it becomes an aggregate view of all permissions for tools used within the site.

ToDo :

Domain	Description	Work Estimate
Design	Redesign page for aggregate tool permission view	16 hours
Technical	Investigate whether such an aggregated view can be achieved	
Technical	Implement a set of widget permissions that control controlling widget layouts, changing settings on widgets, ...	32 hours
		<b>Total: 48 hours</b> (Incomplete est.)

## 6. Site Settings - Import/Export

For now, we will remove the Copy My Sites and Site Templates tabs.

The screenshot shows the 'Site Settings' page with a navigation bar containing 'General', 'Members', 'Roles & Permissions', and 'Site Backup & More'. The 'Site Backup & More' tab is active and highlighted with a red circle '2'. On the left, a sidebar menu has 'Import / Export' selected, with 'Copy My Sites' and 'Site Templates' listed below it, and a red circle '1' next to the sidebar. The main content area is divided into two sections: 'Import a Site's Data' and 'Export Data from My Site(s)'. In the 'Import a Site's Data' section, there are three red-bordered boxes: the first contains the 'Choose a Format' dropdown set to 'XML' and a 'Help me decide' link; the second contains the 'Upload a Site File' input field and a 'Browse' button; the third contains the 'Pick an Import Method' section with two radio buttons: 'Merge with Current Site's Data' (selected) and 'Delete Current Site's Data & Replace with Import'. Below these is an 'Import' button. The 'Export Data from My Site(s)' section has a red-bordered box around the 'Choose a Format' dropdown (set to 'XML') and the 'Select Site(s) to Export' list, which contains 'ACC250, Section 2958', 'ACC250, Section 2959', 'ACC250, Section 2960', 'Joe's New Site', and 'Math Club'. Below the list is a 'Show More Options' link and an 'Export' button.



### 1. Red areas

All of these fields will be removed from the screen. The screen will allow you to import a site's "structure" (tools - dashboard layout - settings), and export the structure of the current site too.

ToDo :

Domain	Description	Work Estimate
Design	Re-design screen	4 hours
Feedback	Request feedback from the WG looking at archiving	6 hours
Technical	Investigate how export and import happens nowadays	
		<b>Total: 10 hours</b> (Incomplete est.)

## 2. Site Backup & More

We will rename this tab to Admin, and it should contain some explanatory text of what the screen does

ToDo :

Domain	Description	Work Estimate
Design	Rename tab	10 min
		<b>Total: 10 min</b>

**TOTAL HOURS = ~226 (5.7 person weeks)**