

Authoring Summit - Use Cases

The following Use Case domains are created for discussion at the First Authoring Summit. More specific use cases should be included as sub-sections within them.

Roles (feel free to add more if needed)

Linda Walsh, professor of chemistry
James Smith, instructor, introductory computer languages
Nick, professor of history
Jonas Oldtimehr, retired, part-time online instructor
Elizabeth Cantor, high school math teacher
Ling Wu, graduate student
Carlos Ramirez, undergraduate student
John Hanson, IS administrator
Celeste, subject librarian for history
Lucy, government documents librarian
Alex, grad student in Early Childhood Education

1. Site pages (CARET Portal, Anthony & Josh's tool)

~~Independent of how sites are organized (existing portal, GoogleTools, etc.),~~ there is a need to allow users to easily create pages that can be linked to other pages. These should be as flexible as possible in terms of layout and allow a rich set of content elements to be added to a page, including: marked up text, lists, tables, media objects (video, audio, flash, applets, etc.), and embeddable tools (GoogleTools, Widgets, synoptic Sakai tools, etc.).

1.1 The CARET Use Case (note the public aspect of this is optional)

Nick, professor of History, has just arrived from another institution and wishes to teach history for the first time at Sakai University. He will teach a new masters course in the history of interplanetary travel, based on his research in the field. Because this is good way to communicate his research he would like much of the site content to be available to the world for anonymous viewing. He requests a site and it is approved. The membership of the site is auto-populated from the Registrar's system and he takes a quick look at the number of students who have already signed up and reads about their backgrounds and qualifications. While he is there he checks that this information is set to private-instructor-only although the instructions tell him this is the default and can only be changed to "public" by collecting the agreement of each student.

Nick will teach the course in 8 weeks so he chooses the topics he wants to cover in each of the 8 weeks and creates a "top level" page for each week using the "add page" button. The "top level" pages reassuringly appear. Nick returns to the first page (for week 1) "Lights in the Sky" and writes an outline of the topic. He inserts a panel with links to library resources and some "pre-canned cross-repository searches" he has tried out after consulting Library Services. He makes sure he has explained that guest users may not be able to use the pre-canned searches or view all of the references. There is a footnote explaining how to use public libraries to access the resources or how to request copies from the University Library. He also inserts two assignments, with due dates and plagiarism detection turned on, again noting that external users will not be able to submit the assignments for marking. He adds a couple of sub-pages with detailed explanations of his research methodology with hyperlinks from the top page. Finally, he adds a quick poll (who has travelled to more than 5 planets in the last year?) and allows the public to respond and adds a comment 'gadget' with guest comments allowed (people who have registered with a valid email address, but who are not on the course) so he can get public reactions to his work.

He repeats this for each of his top level pages. In 3 of the pages he inserts 'Learning Units' from the NSA "how to recognise an alien" learning materials that he uploads in SCORM format. He then previews the site in 'registered student' view 'guest' view and 'public' view to check things are working as intended. When finished he makes the site public and sends an announcement to the registered students that the site is available and they can start work on the first assignment. He then calls the press office and gives them the URL for his public course and settles down to prepare the first lecture.

1.1.1 The CARET Use Case (Portfolio)

To make a point I have adapted the Portfolio Content Authoring Use Case for this context. The changes are tiny. You can view the differences here (empty password, click quick compare): <http://123.writeboard.com/7f5c0ab98dd96c24a>

School of Education
Context:

The School of Education has several tracks, such as for Early Childhood Education, Science Education, Secondary Education, etc. Each track is administered by different faculty members, with specific requirements, etc. The school does not set the path students should take through their program, allowing students to sequence their classes in the order they choose as long as they meet certain requirements. Items in parentheses indicate functional requirements supporting the activity being described.

Departmental needs:

Although the SOE department has an overarching model for what student web pages **portfolios** should include (department-defined scaffolding), the department is allowing faculty within each track to provide some customization about what content is required for their students (track-specific scaffolding). For example, Science Education wants their students to include a specialization web **portfolio** page where students describe their focus within science education. In contrast, Early Childhood Education wants their students to include exact lesson plans that all follow a very specific format (**portfolio** page templates). Once students have completed their web pages **portfolios**, the department would like access to completed web pages **portfolios** for demonstrating outcomes to accreditation agencies. In addition, they would like students to be able to share their web pages **portfolios** with the department so it can be used in their thumbnail gallery (publish to gallery as thumbnail). The gallery would include a search function where student web pages **portfolios** could be sorted based on student-applied tags to **portfolio** pages and text (tagging of text and **portfolio** pages). The department could also use these tags for generating reports on all portfolio web pages for accreditation agencies (reporting of tagged data).
Student needs:

Alex is a first year student in the SOE in the Early Childhood track. A final requirement of her research methods course is to complete a web **portfolio** page about her fieldwork that includes information about the research methods she applied to improve her lesson plans. Midway through the semester, she received some feedback on an assignment that prompts her to begin her first **portfolio** page. She immediately clicks on the "create a **portfolio** add page" link in her personal site and starts authoring (able to start a new page anywhere that can be later linked into a portfolio). On this particular **portfolio** page, she wants to include a portion of her last assignment (ability to include material from other tools), as well as embed multimedia files of her work in the classroom (ability to embed video, audio, etc.) She also has many images of the classroom that she would like to include on this particular page (easily add images).

While Alex is authoring, she likes taking breaks from working on content by playing with the design of the page. She quickly chooses **left hand navigation and autumn hues** for her color scheme (ability to select placement of navigation and preset color choices for the page) "apply theme" and views the result. Alex really likes having instant visualisation of the impact of different themes and tries several before finally settling on her preference. **visual cues for selecting the navigation and color hues**, so she doesn't have to guess what each of them will look like (visual cues for selecting skins, colors, navigation, etc.). Later, she finds that a friend who is a whizz with CSS has made an even better theme and she uploads and applies that theme. Finally she edits the theme by selecting an image of kids playing in leaves as the background for her navigation area (ability to upload images and use them as background images).

After she has included all of her content and has a design she is happy with, she decides to request feedback from her professor. From her portfolio page she uses the system's "request feedback" option and writes a note about what she is struggling with (ability to request feedback and send email to person giving feedback).

While Alex waits for feedback from the faculty member, she decides to create a web **portfolio** page out of a lesson plan she had created in Microsoft Word using a .dot file provided by the department. This template defines a number of styles that translate well to HTML, such as h1, h2, h3, and h4 headings. She starts a new portfolio page and uses the import from word function, which automatically transfers the styles, layout, and content from Word into her portfolio page (import from word that includes styles, tables, etc.).

After playing with the design and putting final touches on her lesson plan page, she receives notification that her professor has provided feedback (notification when feedback is received). Alex saves the lesson plan and jumps to the feedback from the faculty member (easy to navigate between feedback, authored pages, and other tools). The faculty member has written in-line feedback as well as general comments about her images and text (ability to provide feedback in ways similar to "track changes"). The main comment is that Alex should provide a link on the methods page to the exact lesson plan she is referencing. Fortunately, this is the lesson plan Alex just created as another **portfolio** page, so she quickly adds a link to the lesson plan (ability to set anchors, quickly find other **portfolio** pages for linking, and link between **portfolio** pages), makes some other changes based on the feedback (see feedback and portfolio page at the same time), and feels pretty good about her two pages.

Alex decides to publish a **portfolio** of her two pages so she can share it with her family and friends. She is able to quickly assemble and publish her mini-portfolio (ability to quickly assemble and publish). After the portfolio is assembled, she uses the share function to write an email to her family and friends (share with university and non-university affiliated groups/individuals), which automatically includes the short URL to her portfolio (meaningful URL creation). Her grandpa doesn't have access to the internet, though, so she downloads a copy of her portfolio onto a CD and will share it with him next time she visits him (downloadable/exportable with images, text, links, etc.).

1.2 Syllabus Authoring

An instructor wants to build a home (or other) page for the site that gives students an outline of what will happen in the course. Potential organizational structures include thematic and calendar-based. Each section of the syllabus has a place for the instructor to write a description of that section and to link to relevant resources and activities that the students need.

1.2.1 The one-page course

Jonas Oldtimehr, part-time online instructor, has been teaching his English Literature course for 25 years. All he has ever needed to make it effective was his syllabus and a textbook. Now that he's retired, he teaches a distance learning class to continue to keep his mind working and avoid going insane from boredom.

His goals are pretty simple: he wants distance learners to work constantly throughout the semester to avoid a last minute time crunch. He used to give reading comprehension quizzes in class, now he wants to do them online. Students also have to submit a paper during the 10th week.

After following the step-by-step procedure to create his course in Sakai, the first screen which is offered is a blank space. He clicks on the Edit link at the top of the page, and pastes in his syllabus from his Word document.

The most useful part of his syllabus is a table in which what students have to do every week is listed (read chapter N, do quiz Z, submit assignment Y, etc.). While reformatting his online version of his syllabus, he noticed he could link to other tools from this page. So he selects the text "Quiz 1", clicks on the Insert Link button and follows the wizard on-screen. He finds the Quizzes category and realizes that he can now hit the new button to generate his quiz. He copies and pastes questions from previous year's exams to build his quiz, saves it, and set the link from his syllabus page.

Even though he didn't save the edits yet, he comes back to the Syllabus page in Edit mode without having lost his work. He repeats the previous process for his three other quizzes, and his paper assignment. Jonas is pretty happy with what he has accomplished, and wishes to copy this course and reuse it over and over again.

2. Educational Content (SCORM, Sousa)

Sakai has long had a need for the authoring and delivery of educational content. Such pages need to permit very rich content, be very flexible in terms of layout, support interactivity (questions, etc.), and be grouped into larger structures (sequences, linked navigation, modules, packages, etc.). Ideally, educational content should support existing and emerging standards such as SCORM, OCW, IMS-QTI, IMS-LI, IMS-TI, etc. Such content should be assignable, gradeable, trackable, timed for release, and re-usable (templates, easy copy and edit, etc.).

2.1 The SCORM Upload Use Case

An instructor has access to an existing SCORM page, perhaps a guided tutorial on using a Mass Spectrometer. Prof. Walsh has found a very nice tutorial on the use of Mass Spectrometers offered under the Creative Common license. She'd like to add this to her graduate course on organic chemistry, since students will be using equipment like this in the lab portion of the course.

She downloads the package to her computer, logs into Sakai and navigates to her Organic Chemistry 654 course site. Use the Sakai SCORM tool, she uploads the MassSpec package, which installs it on her course site. The SCORM tool asks her if this will be assigned for a grade. Giving it some thought, she decides to make it a required assignment and tells the system to make it an assignment, contributing 5 points towards the total course grade. Later she will decide when to assign it.

Students who access the MassSpec content are presented with a sequenced set of pages. These pages may have static content (pictures, text, etc.) or may be interactive (questions, exercises, games, etc.). Progress through the tutorial is monitored. Students can save their current location and resume it later (this might be automatic). Reaching the end of the tutorial, having completed the exercises included in it, the student is assigned a grade for the assignment, automatically posted to the course gradebook.

2.2 The SCORM Authoring Use Case

(to be written)

2.3 The Sousa Authoring Use Case

James Smith is teaching an Introduction to PHP programming course for the coming semester. He's setting up the course to include a series of implementation exercises that conceptually build as the course progresses. Each course module will be presented as a lecture in class followed by a programming lecture. After all of the students have passed in their programs, Mr. Smith would like to provide a step-by-step look at how he wrote that program.

Mr. Smith presents his lectures using PowerPoint in class. He would post them as a Sakai Resource in PPT form, but not all of his students have PowerPoint (hard as it is to believe). The slides are posted in PowerPoint form, but for those that don't have it, they are converted to a series of images and loaded as a Sousa presentation. Sousa has a bulk load feature (TBD) that makes this easy.

For the review notes, instructor Smith creates a series of Sousa pages that progressively show how the program was written. He takes advantage of Sousa's grid layout to put the code in one cell and comments in another. Where a user interface or database schema is needed, these are easily added as images in a third cell. After writing several of these pages, a pattern begins to emerge, so Smith creates Sousa templates for the common page structures. This speeds up the content entry and provides a sense of uniformity to the presentation.

After the pages are created, they are grouped together as a Sousa presentation. This is published and made available with a timed release date. While the review is not required, Mr. Smith is interested in who looks at it, so he turns on tracking to monitor which students read it and how much. This will give him feedback as a teacher in how effect this approach is.

2.4 The OCW Use Case

Part of Prof. Walsh's grad course on organic chemistry will focus on the chlorophyll molecule. After a quick search on a few OCW repositories, she find a nice one from Utah State that includes some great molecular structure diagrams. She downloads the OCW package and installs it in Sakai using the OCW tool.

The material on chlorophyll goes into too much detail that Ms. Walsh feels will distract the students. Using the Sakai Resources tool, she works her way through the loaded content deleting what is not needed. The result is a bit choppy, so she creates a few pages that tie things together once more and put them into the context of the course she is teaching.

3. Search and Research (Sakaibrary)

(Jim Eng to describe the high level Search and Research scenario)

3.1 The Sakaibrary Use Case

Context: Nick is teaching J300, a history class titled Foreign Relations in the American Century. He assigns his students to write a 15-20 page research paper using both primary and secondary resources. To complete the assignment, students will need to use print, digitally created, and licensed electronic resources.

Nick contacts Celeste, the subject librarian for history, and explains to her the parameters of the research paper assignment and his expectations. Celeste works with Lucy, the Government Documents Librarian, to use the Research Guides tool in Sakai to develop a class assignment research guide based on a template from an existing collection of templates for different types of guides. The Research Guide tool enables Lou and Celeste to collaborate and develop the guide together.

Based on the requirements of the assignment, the librarians include the following in the guide:

- Links to and search tips for the "best" or most relevant licensed databases, in this case America: History and Life, Worldwide Political Science Abstracts, Politics and International Relations: A Sage Collection; and Historical Washington Post. These databases are selected from a list organized by subject, as in the "Search Library Resources" function in Citations Helper.
- Predefined clickable searches against relevant databases and catalogs, selected from a list organized by subject
- Predefined search boxes constrained to execute a "Search Library Resources" search against relevant resources selected from a list organized by subject
- Lists of citations to individual books and articles potentially relevant as background material for the assignment
- Original text to guide students through the research process for the course assignment
- Links to assignment-related instructional guides or tutorials on the library's web site or the open web on topics such as evaluating information sources, avoiding plagiarism or citing online sources, identifying best search terms, etc.
- Contact information (e-mail, phone, and/or embedded chat) for selected librarians and the undergraduate library reference desk, obtained from the library web site's content management system via a Web Services request

After the librarians publish the guide to make it available to Nick and the students in his course through the Research Guide tool in Nick's course site, Nick then edits the guide to add some additional citations and suggestions that he thinks will be of value to his students.

4. Portfolio

Portfolio Content Authoring Use Case

OSP tools are currently supporting several models of portfolios at UM. The use case described below represents our most student-centered model, where departments define the overarching parameters for what is required, but the student has control over the content, design, and sharing of their portfolios.

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After she has completed her portfolio she notices several features that she really appreciates, including:

- Navigation already being stitched together for her, so she doesn't have to worry about file names, folders, etc.
- How easy it was to find the pages she wanted to include in her portfolio
- Reliable behavior of the content authoring tools like undo and redo, so she never felt frustrated by things not working or working in unexpected ways
- The size of the editor matched the size once it was published and the colors, navigation, etc. were all accurately displayed during authoring, so there was consistency between what her material looked like when she was authoring and how it looked after it was published
- Auto-saving of her work, so she never lost hours of work because of a timeout or computer crash. In fact, as long as she was editing, there was no danger of a timeout.
- Warnings so that she wouldn't navigate off of the page or get "timed-out" either of which could have caused her to lose work

For reference, we are including below a screenshot of the progress we have made so far in creating an editing environment that meets our needs.

Forms Select the category under which this page should appear in the Work Showcase section of your ePortfolio website.

Portfolio Templates

Page Order Helper

Site Info

Help

Users present: Erica Ackerman

Category Heading for Page: Community Work ← Author specifies navigation/menu heading

Theme: Silicon ← Author selects skin, which displays live

Page Content

Toggle Navigation Menu Fit Editor to Content Set Editor to Original Size

Autosave Status: Last Saved: 12:11:05 PM Autosaving

Editor is wrapped with the selected skin, so the user sees their content in context (banner, placeholder navigation, etc.)

Editor is realistically sized and uses the CSS of the current skin

Default text is provided to guide the student in the authoring process

Student Name
Portfolio Title

Top Level Link Another Top Link One Last Item

Secondary Category
An Item In Category One
Another Secondary Item
Another Category
Additional Item
Final Item for Category Two

Description of the Project ← **h1** as defined in skin's CSS

A caption

Provide an overview of the project or work as a whole, its purpose and mission, a sentence about your role, and a summary of the value or importance of the work overall. Be very succinct.

All examples of work should have visual elements, such as diagrams or images. These elements can be abstract or concrete, personally created or taken from the public domain. Effective visual elements usually capture some kind of theme, context, or objective of the work reflected in the overall summary.

TIP: You can search online at .gov and other sites for non-copyrighted or royalty-free images.

Importance of Project Work

Describe the larger issues and context that frame the work (e.g., the need to provide affordable health care to all people). Try to demonstrate to the reader why the work is important on at least one of several levels. Examples of these levels include:

- Addressing your own learning/development ← **li** as defined in skin's CSS
- Facilitating institutional change
- Enhancing group/community development or well-being
- Addressing inequalities or issues in social systems locally

4.1 The OSPI Use Case

(to be written)

5. Profile

Professor Profile

Linda Walsh finds many occasions within Sakai university where she wants to share a professional view of her degrees earned, research interests, publications, etc. In each case, however, the presentation may differ slightly.

In her classes, for example, her publications are often of little importance, but she'd like the heading portion of the syllabus to always display her background and research focus, along with contact information.

She would also like public access, with a simple, permanent URL containing her name, of a full, professional-looking view comprising all the information she might put in a CV, but with digital materials or links to relevant online publications where appropriate.

Within her department she'd like to present a more focused view of the full CV, highlighting current research, grants recently awarded, most recent publications, and potentially other data required by a promotion-and-tenure committee.

She'd also like her information to surface in relevant public searches. If a student, colleague, or anonymous viewer searched for "Physical Chemistry" in a central location at Sakai university, she is convinced her profile should show up in the top 3 results.

Student Profile

Carlos Ramirez is an undergraduate student. He likes to know who is in each of his course - it helps him find groups to work with, people who have a similar or complementary profile - but, until now, he could not know anything else than their names from the roster list in his course.

One day, he notices a message from the system telling him that his profile is incomplete. He clicks on the provided link and get to his profile. He sees that his picture has been pumped from the registrar's office (looks more like a mug shot...), so he decided to change his avatar to a picture of an eagle, his favorite animal. He fills out the description field, selects his major from a drop-list, add a favorite things category and starts listing his favorite movies and music artists, his hobbies, interests, etc.

Later that week, his professor of Italian asks a specific question to be added to his profile: Have you been to Italy before? If yes, what struck you? If not, what is your interest in this course. He goes back to his profile and finds a field marked "This field will be visible to ITAL101 students only. CHANGE?". He is happy that this info will not appear in his general profile, and that he could add it if he wanted.

Carlos finds out that now that he has a portfolio site, he could really start to gather a lot of information about his progression through his program and show potential employers what he did and learned.

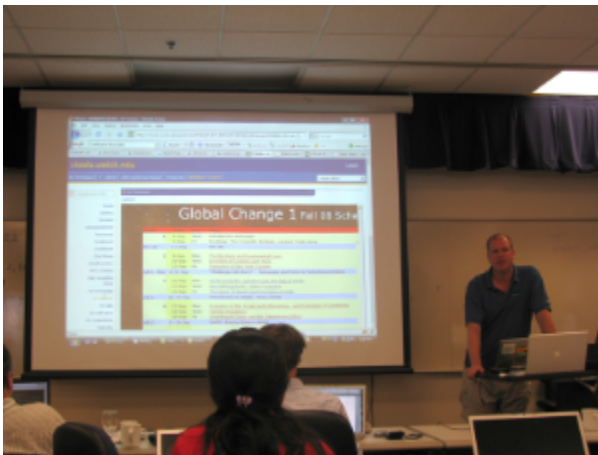
6. Other

6.1 Other Possible Scenarios

We may want to make a distinction between support for established research projects vs. student research projects, the former being more formal and may even have imposed documentation practices and standards.

6.2 Peter's WebDAV example

An instructor can edit a Resource directly through Word, Frontpage, Web Expressions, Dreamweaver, Komposer, etc., without necessarily having to go through Sakai, or upload/download, they can browser straight to it via WebDAV. You can also insert links to other Sakai entities by cutting-and-pasting their URLs from Sakai (for those entities that are URL accessible, there's still work to do there). You can also use the built-in functionality for hyperlinking in these tools to browse Sakai Resources via WebDAV and link to them, rather than find the URL in Sakai and cutting-and-pasting.



It would be great if other entities were browsable via WebDAV too, in order to make it easy to insert links to assignments, samigo assessments, forum topics, etc. into a Resources you're editing in Web Expressions, etc.

6.3 Other Work

Some initial work has been done to define requirements and describe existing applications. See:

- [Mark Norton -- Content Authoring Needs](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
- [Michigan Scaffolded Portfolio Authoring Work](#) (Project: Portfolio)
 - [contauthreq](#)
- [Authoring via an MS Word Plugin](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
- [Authoring Contexts](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
- [Using EntityBroker in authoring](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
 - [entity](#)
 - [technical](#)
 - [prototype](#)
- [10-17-2008 Content Authoring Conference Call](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
 - [conferencecall](#)
 - [authoring](#)
 - [projectmanagement](#)
- [10-31-2008 Content Authoring Conference Call](#) (DG: Development (Building Sakai))
 - [contauthreq](#)

- entity
- requirements
- planning
- conferencecall
- [Three Authoring Levels](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
 - [framework](#)
 - [overview](#)
 - [sakaiauthoring08](#)
 - [outcomes](#)
- [11-14-2008 Content Authoring Conference Call](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
 - [entity](#)
 - [requirements](#)
 - [planning](#)
 - [conferencecall](#)
- [Mark's Authoring Concepts](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
 - [requirements](#)
 - [planning](#)
 - [sakaiauthoring08](#)
 - [expectations](#)
 - [list](#)
- [Enhanced Web View of Resources](#) (DG: Development (Building Sakai))
 - [contauthreq](#)
 - [folders](#)
 - [requirements](#)
 - [resources](#)
 - [sakaiauthoring08](#)
 - [usecases](#)
- [1-9-2009 Content Authoring Conference Call](#) (DG: Development (Building Sakai))
 - [3akai](#)
 - [contauthreq](#)
 - [entity](#)
 - [requirements](#)
 - [planning](#)
 - [conferencecall](#)
- [Red Pen and Highlighter](#) (DG: Development (Building Sakai))
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 - [highlighter](#)
 - [commenting](#)
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- [Authoring Summit - Use Cases](#) (DG: Development (Building Sakai))
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