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Introduction

The beta test of EXPO CMS was held on June 3rd at the Warnell School of Forest Resources, UGA. The following summary is taken from the discussion on Thursday and the additional comments and notes provided by June 7th. I will update this summary as additional comments are received.

I have divided the comments into four groups: general, appearance, function, and user help. Initials following a comment indicate the recorder (mh = Matt) (dh = Dudley) (jb = Joe Burgess) (te = Todd), not the beta attendee that made the comment.

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Send your comments/feedback/ideas to Dudley and I will compile and send revised copies of this document to the committee.

General

Issue	Comments	Action
Legitimacy; need logos and/or sufficient information in "About Us" and "Who is Urban Forestry South" so that users know this is a trusted source. (dh) Related: Under Help, there should be a link "Who is UFS" that describes UFS. (mh)	Need committee feedback/ideas. (dh)	

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Collections will facilitate/create on-line U&CF learning (e.g. Todd Watson, Joe Murray). (dh)	Todd Watson (TX) appears to be working on these on-line systems, so I will contact him about how Collections can facilitate that work. (dh)	
Maybe some topics of interest for the Information Center are Urban Sprawl and Smart Growth. (mh) Related: Content is accessible through Information Centers, should be able to be assigned/selected by administrator. (dh)	Need committee feedback/ideas. I'll also work with Matt on admin support. (dh)	

Appearance (.: understanding the site)

Issue	Comments	Action
There is CLUTTER and NOISE on the homepage; simplify. (mh) (dh) Related: Remove redundant "Urban Forestry South" on homepage. (te)	Bryan has been making some changes to EXPO CMS. Need additional discussion with committee. (dh)	
Information Centers seems to have a conflicting connotation or are confusing; consider selecting a different name like "Information hub", or "Hot Topics" (dh) (mh) (see also Function below)	Need committee feedback/ideas. (dh)	
Change the background color of the Quick Click select box so that it doesn't conflict with lower 1/3 of the left panel (UFS Tools). (mh) (te)	Matt & Bryan can make these initial changes to correct this problem. (dh)	
UFS mnemonic must be clearly defined on homepage as Urban Forestry South if we want to use it. (dh)	Need committee feedback/ideas. (dh)	
The wrench and "Contribute to UFS" are confusing. Contribute == \$\$ donation. (te) Suggestion: change wrench to a "notepad with pencil" or something similar. (te) Suggestion: change to "Learn how to add content to this site" (te)	Need committee feedback/ideas. (dh)	
I (Joe Burgess) would agree with Coder in that the format is too busy. I understand that "space" on the desktop is dedicated and I am not suggesting a rearrangement but the use of three tracks directed by the main page. Pages directed to/from the main page might be: (jb) [also see User Help below]	Need committee feedback/ideas. (dh)	

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1. One desktop for those who want to just search for and print off/download info, (jb) 2. A desktop for those who want to join, (jb) 3. Another desktop for those who login and go directly to their workspace to add documents or create "collections". (jb) Related: A user that joins would be able to set preferences on startup look (dh)		
Change label organization for "Staff" to "Primary Contact" (dh) (te)	Matt can make this minor labeling change. (dh)	

Function

Issue	Comments	Action
May need to add other categories of "people"; e.g. "Municipal Arborists", "U&CF Faculty" in addition to State Contacts, Speakers, Researchers. (dh)	This is something we may wish to add to classifications later. I'll discuss feasibility with Matt. (dh)	
Search results should replace "Spotlights" and "Top Requested" lists that first appear on the area page (dh) (te) Related: When a search is run, the results should always show either near the top or close to the "GO" button. (te)	Matt has already made this change. (dh)	Done
When submitting something to be reviewed, you should be able to select a certain reviewer or group of reviewers. (te)	I don't think that the user submitting content needs to be able to pick the reviewer; this is something that will be handled by workflow or I'll distribute to additional reviewers as necessary. (dh)	
Possible feature: Temporary Reviewer privileges? (For critical topics that cannot be officially reviewed in time) (te)	This will happen as needed; but I don't see any difficulty at this point. There will eventually be 2 "admin" level here at SCUFR&I and also Nancy (possible Ed) to act as reviewers of content. (dh)	
Since collections consist only of published content, they should not have to be reviewed, they should be public immediately. (te)	This is not exactly correct, because the user creating the collection will enter a description and assign sub-topics and keywords. Also, an expiration date will have to be set and the	

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	reviewer may opt to "spotlight" the collection. Therefore, review is necessary. The basic rule is, "everything published will be reviewed". (dh)	
<p>When creating content, it seems to create the object and then edit it. If the edit is never saved, the object remains. (te)</p> <p>Related: On a content edit page, there should be a cancel button that deletes the object and returns to their workspace. (mh) (te)</p>	<p>Hopefully Matt can handle this. It may also be resolved as a training issue, since it is not that difficult to delete workspace objects that aren't needed. (dh)</p>	
<p>When modifying/creating a collection, the collection list objects should be shown at the top; provide more information on how to use that page. (te) (mh)</p> <p>Related: In collections page, the "select from left, add to right" boxes can be confusing. Need labels/explanations. (te)</p> <p>Related: Filer content is too vague. (te)</p>	<p>Good points that need to be addressed. Need committee feedback/ideas. (dh)</p>	
<p>Need way to get "hot topics" to front page into what is now called "Resource Centers". (dh)</p>	<p>I'll work with Matt on this. (dh)</p>	
<p>In Class Activity we need to add attributes for state standards and class level. (dh) (te)</p>	<p>I'll discuss this with Kris. (dh)</p>	
<p>When selecting/entering "topics" and "keywords" need to provide "step-by-step" help of the process. (dh)</p>	<p>Need committee feedback/ideas. (dh)</p>	
<p>Remove "Organizational Management" selection box (and attribute) and replace with a topic/subtopic(s) that deal with this type of content. (dh)</p> <p>Related: Use special keywords like "U&CF Funded" to tag funding source to content. (dh)</p>	<p>I'll work with Matt on this change. (dh)</p>	
<p>Make the keywords field required and provide more description on it and subtopics' uses. (mh)</p>	<p>Need committee feedback/ideas. (dh)</p>	
<p>When a user clicks on a topic in the content by topic box (at the bottom of a page), they should be taken to a page that also has a content by subtopic box; they would get a list of content when they select a sub-topic (or should have an option to see all content in the topic). (mh)</p>	<p>This sounds like a good idea. I'll check with Matt on implementation. Need committee feedback/ideas. (dh)</p>	<p>Done</p>

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Possible use Java to create "cascading" series of questions in data entry to guide the user to answers; for some types example would be: Do you have a file to upload (send)? [If no] Do you have a URL that points to a document? [If no] Copy and paste the article into the editor window. (dh)	We are already using some Java script	
In [user] preferences, "title" should be a dropdown list. (te)	I'm assuming they mean titles like "Dr", "Mr", etc., not a position title like "U&CF State Coordinator". I've noticed that job description titles are quite variable by state and think that should be "freeform" rather than a controlled vocabulary. (dh)	
Would like to further divide state contacts down into county or city. (te)	I think that we could possibly develop an advanced search to cover this. For state contacts I don't think this is an issue, but for speakers and other people classifications that we may add (e.g. Municipal Arborists), it could be helpful. (dh)	
Keyword searches should also search topic and subtopic. (Not sure why I wrote this down, advanced search allows you to choose any or all 3.) (te)	I think this is already working. (dh)	Done
"Most popular" or "most requested" items should reflect hits within the past 30 days, not total hits forever. (te) Related: Lose the "top five" it is a self-fulfilling prophecy. (jb)	This is a good idea (30 days) and if we hide the list under a "display the list on demand" button will eliminate loss of screen real estate and "clutter" for those of us that aren't interested in what other people are interested in. Need committee feedback/ideas. (dh)	
Need a "save changes" button both at the top and bottom. (te)	"Cancel" and "Save" buttons at top would be very good. (dh)	
Possible feature: When adding an image, could the author add a high-resolution image, and have the site automatically create lower resolution ones? (te)	I don't see the need for this. Need committee feedback/ideas. (dh)	
There should be a "Go Back" button for all main menu pages that brings the spotlight, most requested boxes back. (mh)	I'll see what Matt can do on this. The home page should probably always appear the same no matter how a user gets there. (dh)	

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There should be a grant program metadata field for content that shows if this content has been funded by a grant. (mh)	We will need to add this (most likely) to support the National Tech Transfer database. I'll be making those changes soon with Matt. (dh)	
There should be a way to accept or reject a user's request for a classification. (mh)	This is part of the workflow, unless I do not understand this comment. (dh)	
In a state/region select box, the regions should be shown in capital letters. (mh)	Would be very helpful if possible. Could possibly have multiple (3) drop-downs; the user would select from only 1; States only, US regions, World. Need committee feedback/ideas. (dh)	
The review list should show the Creator of the content that has been submitted. (mh)	This would be very helpful. Some users will always submit good material; others will need additional training. (dh)	
When viewing your workspace, the select box that filters content should work for the published and pending items box also. (mh)	Matt is working on this. (dh)	
I guess the html and the "plone" system prohibits the drag and drop methodology. That would really make things easier. (jb)	I think Joe is correct, "drag & drop" is not possible. (dh)	
<p>Obvious data entry errors:</p> <ol style="list-style-type: none"> 1. If an error is given stating data is missing, it is not showing WHAT data is missing. (te) 2. For some reason, the demoaccount was able to access and modify another user's workspace (alawrence's) (te) 3. There is a problem with the validation of edit pages. The validator is not finding the id field for newer users. (te) 4. The Add to Collection page that lists the users collections is not correct, i.e. it still lists collections that have been deleted. (mh) 	I believe Matt is working on these. (dh)	

User Help

Issue	Comments	Action
Will need clear policy and instructions on submitting content to	Part of on-line help and training. (dh)	

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Issue	Comments	Action
alleviate "fear" (dh)		
For News Items, will have to establish clear rules for "relevancy". (dh)	Part of on-line help and training. (dh)	
Need to develop expiration (sunsetting) policy and resolve any conflicts with "collection" components that expire (i.e. notify collection owner) of loss of content (dh)	Part of on-line help and training. I'll also discuss with Matt. (dh)	
"Advanced Search" needs to connote functionality to users (i.e. terminology) (dh)	Screen appearance, on-line support and training can probably address this. Need committee feedback/ideas. (dh)	
At "login", new users should get directed to brief instructions and sources (i.e. Expo CMS links) of more in depth help. (dh) (mh) (te) Related: Any users should be able to find these introductory instructions (and other help links) easily from the home page (dh)	We will work on this. Need committee feedback/ideas. (dh)	
Need more "pop up" help balloons; "tool tips". (te) Related: There should be a login tool tip (or other instructions), that reads "Login if you want to contribute [content]; otherwise, search & browse to your heart's content" (mh) (dh)	"Tool tips" in Plone are somewhat of a problem since Matt can't control them easily (or at all). Need committee feedback/ideas. (dh)	
It needs to be explained/shown that you have to use "CTRL" to select multiple items from the selection lists. (te) (dh)	This is a standard Windows feature, but we can also provide additional help to users unfamiliar with Windows functionality. (dh)	
In collections page, the "select from left, add to right" boxes can be confusing. Need labels/explanations. (te)	Need committee feedback/ideas. (dh)	
Make the "Guide to Urban Forestry South" more prominent. (dh) (mh)	Need committee feedback/ideas on how to do this. (dh)	
When selecting/entering "topics" and "keywords" need to provide "step-by-step" help of the process. (dh)	Need committee feedback/ideas. (dh)	
Provide a manual for less sophisticated/experienced Urban Forestry South users. (mh)	Need committee feedback/ideas. (dh)	
UFS mnemonic must be clearly defined on homepage as Urban Forestry South if we want to use it. (dh)	We can figure something out to handle this. I will call Annie for additional ideas. (dh)	
Need a "search tips" helpfile to explain how the search engine	This is a good idea; maybe a FAQ just for	

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Issue	Comments	Action
works. (te)	using the site would help. Need committee feedback/ideas. (dh)	
I believe a "collection" is what many folks already are working with except they call them "folders" and "content" is/are really "files" and "content types" are really "file types" and the "content management system" is a "file management system". I don't see a reason to change this jargon unless it is for proprietary reasons. (jb)	Terminology issues that we need to resolve. It does need to be easier for our users. Need committee feedback/ideas. (dh)	
<p>I figure the main page would ask questions and have check boxes like: (jb)</p> <p>"I want to search the database for documents, images, etc., I understand that I do not need to join or login to perform this search" (jb)</p> <p>"I want to join so I can submit documents, images, etc., as well as search the database for documents, images etc." (jb)</p> <p>" I have already joined and I want to login so I can submit documents images, etc., as well as search the database for documents, images etc." (jb)</p> <p>Related: On home page or when users login, ask "What do you want to do?" and make Expo CMS use more intuitive. (dh)</p>	Need committee feedback/ideas. (dh)	

Compiled by:

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