

## EVIE Software Development Plan

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## 1.1 General Channel Building Strategies

The initial rollout of the Luminis Portal will begin with version 3 which has no support for JSR 168 portlets. Later, this will be upgraded to version 4 which does have portlet support, being based on uPortal 2.5<sup>1</sup>. The timing of development is therefore an issue.

The JISC funded EVIE project has a responsibility to share its results with other contributing institutions and the clearest way to do this is to produce standard JSR 168 compliant portlets. The student portal project has no such responsibility, but the two projects are closely tied as are the content produced by these.

Additionally some of the built in features of Luminis may make it sufficiently attractive to develop functionality as channels.

Cross channel communication may be required. We must avoid getting into a situation where we feel we have to develop a channel as an IChannel because a channel it communicates with is also an IChannel. Such a criterion could chain indefinitely.

In general JSR-168 portlets should be preferred except where a clear and significant justification dictates otherwise.

In the case of third party web sites, we can harness the functionality – we need to work out the considerations involved in doing this and the criteria to apply.

## 1.2 Order of Implementation

Because many of the constraints on the order of development are external to the team, a rigid ordering or development is not possible. Instead, the channels will be placed into several phases with low numbered phases implemented first. The ordering of channels within phases should be seen as arbitrary and not a reflection of the development order within phases.

It is anticipated that early phases will be completed quickly to bring people on board and maintain project momentum. Later channels may supersede earlier ones.

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<sup>1</sup> Based on information from the Luminis User Group meeting (9/1/06). This differs from information fed from Sungard to the trainer at the Luminis SDK training – which indicated uP 2.4.2 would be under LP IV

### 1.2.1 Phase 1

This should be a small stage, easily achieved, during which valuable skills and lessons will be learned that can be applied to later phases.

ID	Ref	Title	Lifecycle Stage	Description
101	A(c)	SRU Single Search	Resource Discovery	<ul style="list-style-type: none"> <li>• SRU search preconfigured to a single database, for example a TEL instance</li> <li>• List selection:                             <ul style="list-style-type: none"> <li>○ A drop down list of preconfigured SRU resources, allowing selection of resource to search</li> <li>○ The first page of the user interface presents a list of preconfigured SRU resources and on selection drills down to a page that provides the search interface</li> </ul> </li> </ul> <hr style="border-top: 1px dashed black;"/> <ul style="list-style-type: none"> <li>• User can add or choose their own SRU resource using the Luminis parameter functionality</li> </ul>
102	A(i)	Bookmarks	Resource Discovery	A place for storing personal bookmarks
103	B(e)	RSU Training Tutorials	Obtain Funding	How tos, tutorials, and advice on obtaining funding
104	B(f)	Funding Alerts	Obtain Funding	Receiving alert emails from a mailing list and packaging them into a list of the most recent. (Investigation)
105	C(b)	Calendaring	Collaborative Tools	Calendaring using Luminis native functionality including combination of calendars into one
106	C(e)	Group Admin		Paper based capture of workflows

1.2.2 Phase 2

ID	Ref	Title	Lifecycle Stage	Description
<del>201</del>	A(a)	Metafind	Resource Discovery	Innovative Metafind via a search form within the portal. <b>Due to delays in the testing and adoption of this product , uncertainty exists which has resulted in the deferment as 407</b>
202	A(b)	Z39.50	Resource Discovery	Using CREE Portlet to access ZETOC site
203	A(f)	ULPD Search	Resource Discovery	Simple search linking into ULPD database
204	C(h)	Dear Diary SSO	Collaborative Tools	Link to some kind of Blog, most likely elgg.leeds.ac.uk
205	C(a)	Forums/Threaded Discussions	Collaborative Tools	Use the Native Luminis Forums, presented via a channel or tab
206	C(e)	Group Admin	Collaborative Tools	Decision and scoping for representing and managing VRE groups ----- Automated creation of calendars and forums for groups, i.e automating workflow identified in 106
207	B(f)	Generate Funding Alerts RSS	Obtain Funding	Package an email folder (which contains email alerts from subscription services) as an RSS feed
208	B(f)	Present Funding RSS	Obtain Funding	A channel that displays the RSS feed from 207 ----- Enable the channel to filter the RSS feed based on simple preference tags
209		Training Tutorial investigation	All / Generic	Investigation extending 103 to other lifecycle stages, including other University of Leeds websites as well as RSU, eg SDDU, Library
210		Tutorial Channel on Obtain Funding	Obtain Funding	Turn links and sources (from 103) into a workflow guide on applying for funds

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1.2.3 Phase 2½

The way this phase is achieved will depend heavily on the decisions made in 206, and on learning through the implementation of 205.

	<b>Task</b>	<b>Description</b>
250	Setup of prototype VRE	Draw up a set of tabs and layouts (perhaps revisit the clickthrough). Implement this on the EVIE demonstration VRE portal and populate it with channels developed in Phase 1 & 2 for demonstration and early feedback
251	Build basic research group infrastructure	Setup the core tables required to implement and support EVIE research groups
252	EVIE research group admin	Extending the Group Admin channel (task 206) to populate the EVIE group tables (task 252)
253	Document options for channels being group aware	Document all of the ideas discussed for making a channel aware of the available EVIE research groups, and having the tool select one of the groups for its current view
254	<del>A group aware channel</del>	The modified Luminis Group Studio forum are being used as an example of an aware channel
255	<del>channel modified to add group selection</del>	The modified forum has been given a drop down select to change the current group viewed

1.2.4 Phase 3

ID	Ref	Title	Lifecycle Stage	Description
300		Active Group Selection	Collaborative Tools	Allows user to select the active group using the tables defined in 251
301		Group bookmarks	Collaborative tools	Allows a group of researchers to build up a shared set of bookmarks, which can be accessed by all the members of that group. <b>(Based on 102)</b>
302	C(a)	Threaded Discussion/Forum	Collaborative Tools	A forum for the research group using an inline tool (based on task 205)
302a				Minor change request, remove selector dropdown
303		Community Blog	Collaborative Tools	A community blog for the currently selected research group
303a				Discuss functionality to surface Push values into MySQL Template work (caveat)
304		Research Group Member List	Collaborative Tools	A list of members of the currently selected group with contact details and role information
305	C(g)	Wiki	Collaborative Tools	Set up a basic Wiki, probably based on XWiki presenting a shared document editing area
305a				SSO to XWiki – extend group admin to register users(?) Template mod

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306		Extend Research Group Infrastructure	Collaborative Tools	Include extra database tables to allow tools to be associated with parameters specific to individual research groups
				Iframe Channel to be group aware
307		Document subscribing to group aware channel sets	Collaborative Tools	Document how to subscribe to all of the individual tools available to the research groups
308	C	Set up calendar server on Luminis	Collaborative Tools	Document and implement LP so calendar server is available
	C(c)	<del>Email</del>	Collaborative Tools	Probably OWA
	A(c)	<del>SRU Single Search</del>	Resource Discovery	One portlet displays a list of SRU resources while another (possibly auto subscribed) displays search results. <b>(Supplements 101)</b>
		<del>Linking SHERPA and ULPD</del>	Prerequisite to further work in Resource Discovery and Research Outputs	Linking the two databases together based on a DOI and/or custom field.
	D(a)	<del>ULPD/SHERPA Upload</del>	Research Outputs	Upload research outputs to ULPD and SHERPA

1.2.5 Phase 4

ID	Ref	Title	Lifecycle Stage	Description
401	B(k)	BI Grants Management	N/A	Presenting the BI Grants Management Channel targeting a project managers channels
402	B(b)	COSTA	Obtain Funding	Presenting an SSO Link to COSTA
403	A(f)	ULPD/SHERPA Combined Search	Resource Discovery	<b>(Supersedes 203)</b>
404	A(d)	Multiple SRU/Z39.50 Searches	Resource Discovery	<p>Display results from searching several sources. 4 possibilites:</p> <ul style="list-style-type: none"> <li>• Display one result set at a time in a channel. Allow switching between them.</li> <li>• Display N results alongside each other in the same channel.</li> <li>• Have a fixed number of presubscribed results channels controlled by a master channel. When the number of sites searched exceeds the number of results channels a warning is displayed to the user.</li> <li>• Autosubscribe to the number of channels required to display all the results sets.</li> </ul>
405	B(f)	Funding Alerts	Obtain Funding	Funding Alerts entered and Distributed through the portal. <b>(Supersedes 104)</b>
406	B(i)	SDDU Training Database	Generic	
407	A(a)	Access to Cross Search product	Resource Discovery	University of Leeds Library cross search product, perhaps implemented as a search form within the portal that displays results and further search in a new window.

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*1.2.6 Not to be attempted*

<b>ID</b>	<b>Ref</b>	<b>Title</b>	<b>Lifecycle Stage</b>	<b>Description</b>
1001	B(c)	Grants Management	N/A	Grants Management is an SRU managed function.
1002	C(f)	Online Polling	Collaborative Tools	
1003	C(d)	Document Management	Collaborative Tool	Would require large amounts of disk space which is probably beyond the scope of the project.
1004	A(g)	Alerts for new resources	Resource Discovery	
1005	A(e)	In-house cross search	Resource Discovery	