

Content Management System Development Specifications

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This file is one example of my technical business analysis work. In most cases, I attempt to put together specifications so, that both the application users can understand them and the developers can use them. These kinds of specifications help to form bridges between the users needs and the development processes, and to build well functioning, highly usable applications that perform lots of tasks for the users. As needed, additional documentation for back-end functionality development and mockups for front-end user interface development can be developed as well, in accordance with the specifications master file.

If you want to use any part of this specifications file for your own application development purposes, please create a clearly noticeable and visible, human readable link from one or more high traffic pages on your website to either

<http://www.ProjectDeveloper.com>

or to

<http://www.CreativityManagementNetwork.com>

or to both sites.

Thank you in advance,

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Content Management System's Purpose and Setup

Content Management System's Purpose

Like many other sites, CreativityModel.com informative-educational website needs a content management system (CMS) that can be used for publishing and website content management, and also includes some workflow management tools.

In CreativityModel.com case, we can divide the areas that need to be addressed into the following groups:

- Administrators activities
- Administrators submissions
- Visitors activities
- Visitors submissions

Together, these groups combine content, publishing, and workflow management tasks. In addition, CMS setup needs workload and administrator structures.

Below are brief summaries of these areas and groups, which are further addressed in the rest of this file.

Workload Structure Setup

Workload structure helps to prioritize the work that needs to be done.

Total workload, that is, the total amount of work that at any given point in time needs to be handled or can be reviewed through the CMS, is divided into **task categories**, which in turn **contain individual items**. Further, workload handling is divided into **Current Workload** and **Previous Workload**.

Administrator Structure Setup

Website administrators, who perform the tasks, are divided into **admin groups**. More experienced admins should be able to check and approve less experienced personnel's work. As part of this setup, every feature that is administered through the CMS, should have a **feature group** designated to it.

Administrators Activities

In this area the primary objective is to **track** the work that **needs to be done**, and to **alert** designated administrators if either certain work has not been performed within designated times, or if no coverage is detected, that is, if nobody seems to be doing the work as planned.

Administrators Submissions

In this area the primary objectives are to **add website content** and to **track and approve the work that was done** by less experienced support personnel. We want to be able to track who did what and when, and approve the work that has been done, before the results are finalized in the back end and appear on the website.

Visitors Activities

Visitor activities are visitor actions that trigger CreativityModel.com website's functionality. Visitors activities create activities for the site administrators.

Visitors Submissions

Just like visitor activities, visitors submissions (primarily questions, comments, replies and inquiries) create activities for administrators, thus forming workflow spirals.

Workload Structure and Handling

Overview

Workload Structure

Workload structure helps to prioritize the work that needs to be done.

Total workload, that is, the total amount of work that at any given point in time needs to be handled or can be reviewed through the CMS, is divided into **task categories**, which in turn contain individual **items**. Admins should be able to perform work on the items as needed.

Workload contains > task categories, which contain > Items.

Workload Handling

Workload handling is divided into **Current Workload** and **Previous Workload**.

Current Workload consists of **unhandled items**, which are items for which the CMS workload related processing has not been completed.

Previous Workload consists of **handled items**, which are items for which the CMS workload related processing has been completed.

- CMS should contain data about unhandled items (what and how much has been submitted, and who should be working on these items) and handled items (who handled what and when).
- In addition, CMS should contain user interfaces and functionality for handling the unhandled items.
- Additionally, CMS should be set up so, that selected items can be reviewed and processed further after they have been handled. For example, admins should be able to delete previously posted questions, comments and replies.

Definitions

Definitions are related to the above Workload Structure and Workload Handling subsections and to the rest of this file's content.

- Activity – Anything that triggers website's functionality.
All activities are fine, other than the listed abuses. Initially we probably will not have a perfect list of abuses, so, we will need to update our list and the relevant functionality parts on as needed bases.
- Handled items – Items, for which the CMS workload related processing has been completed. Opposite of “unhandled items” that are described below. Previous Workload Review and Handling subsection addresses work with handled items.
- Items – Individual parts of a task category that need to be processed through the CMS.
- Submission, or entry – Anything that is stored in our database.
- Task category – A division of workload. That is, the total workload is divided into task categories.
- Unhandled items – Items, for which the CMS workload related processing has not been completed. Opposite of “handled items” that are described above. Current Workload Handling subsection addresses work with unhandled items.
- Users – People, who use CMS for the main website administration-related work.
- Visitors – People, who open any page on CreativityModel.com main website. This includes CreativityModel Enterprises, Inc. employees.
- Workload – Total amount of work that needs to be handled and can be reviewed through the CMS.

Task Categories

Total workload is divided into task categories. Below is an overview of these task categories. The relevant user interfaces and functionality parts are further explained in other sections and subsections of this file. In addition, both Administrators Activities and Administrators Submissions sections contain further information about task category related functionality needs.

- Administrators Activities section describes tools that provide information about what the administrators need to do.
- Administrators Submissions section describes tools that will be used for actually performing the website content publishing and management tasks.

Ads Management

Ads placement

Questions, Comments and Replies

Questions, comments, and replies total items

Questions

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Comments

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Replies

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

All admins should be able to work with questions, comments and replies through the CMS as indicated. In addition, MgtAdmin and higher should be able to work with posts, questions, comments and replies through the Page Edit functionality.

Inquiries

Inquiries total items

By inquiry type, each by

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Total number of inquiry types is not fixed. So, we should try to set the CMS up so that when a new inquiry type is added, the relevant entry will appear in the CMS, too.

User interface and the relevant functionality setup can be very similar to Questions, Comments and Replies user interface and functionality setup.

Questionnaires

A special note about questionnaires: At the time of writing this text, it has not been decided yet, whether to have questionnaires as part of the application, or to use another, external service for handling the questionnaires and the relevant functionality.

Questionnaires total items

By questionnaire type

Total number of questionnaire types is not fixed. When a new questionnaire is added, an entry should appear in the CMS, too.

Profiles

New and modified (registered website visitors) profiles total items

New profiles – review, modify if needed (for example, if inappropriate language is used), contact visitor if needed

Modified profiles – review, modify if needed (for example, if inappropriate language is used) , contact visitor if needed

Live Chat Transcripts

Live Chat transcripts total items

New Live Chat transcripts – review, store or delete. If stored, add an explanatory comment (reason for storing)

Flagged as Offensive

Questions, comments, and replies flagged as offensive

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Abuse Control System Related Items

Abuse control system related item handling

Homepage Content

Homepage entries are text areas with colored captions.

New and existing homepage entries (that are listed here because they require work) total items

New homepage entries that are needed

New homepage entries that require approval – should be able to assign to all whose approval is needed

Existing homepage entries that require editing

Existing homepage entries that were edited and require approval – should be able to assign to all whose approval is needed

Blogging Pages: Posts

New and existing posts (that are listed here because they require work) total items

New posts that require approval – should be able to assign to all whose approval is needed

Existing posts that require editing total items

Editing through CMS

In addition, MgtAdmin and higher should be able to work with posts, questions, comments and replies through the Page Edit functionality.

Existing posts that were edited and require approval – should be able to assign to all whose approval is needed

Non-Blogging Pages: Sponsorships, Product Evaluations and Promotions

These non-blogging pages that are used for sponsorships, product evaluations and promotions are handled similarly to blogging pages. Thus, similar functionality is needed. The primary difference is, that Page Edit functionality is not needed for the non-blogging pages.

New and existing non-blogging pages total items

New non-blogging pages that require approval – should be able to assign to all whose approval is needed

Existing non-blogging pages that require editing total items

Existing non-blogging pages that were edited and require approval – should be able to assign to all whose approval is needed

Section Pages and Their Items

Section pages are the introductory pages to website sections. The section pages part is included here, in the CMS specs file, tentatively. At this point I don't know yet, what and how much will appear on the sections pages automatically, and what we will handle through the CMS.

New section page entries that are needed

New section page entries that require approval – should be able to assign to all whose approval is needed

Existing section pages that require editing

Existing section pages that were edited and require approval – should be able to assign to all whose approval is needed

Additional Content Management

Popups content

New and existing popups total items

New popups that require approval – should be able to assign to all whose approval is needed

Existing popups that require editing total items

Existing popups that were edited and require approval – should be able to assign to all whose approval is needed

Site Map subsections explanatory text management

New and existing Site Map subsections explanatory text total items

New Site Map subsections explanatory text items that require approval – should be able to assign to all whose approval is needed

Existing Site Map subsections explanatory text items that require editing total items

Existing Site Map subsections explanatory text items that were edited and require approval – should be able to assign to all whose approval is needed

Search Functionalities

Please see the main website specifications file Search Functionality subsection for the relevant information.

We most likely will want to use Google's Custom Search Engine (CSE) for both website and CMS.

On the website in each search instance posts, questions, comments and replies should be searched.

In the CMS, we want to include the same search functionality. In addition, we need individual search functionality parts for most of the CMS user interfaces. For example, every user interface in the Current Workload Handling category needs search functionality that searches only these records that are relevant to that user interface.

So, for the most part these individual user interfaces search functionalities are identical to each other, only the searched records differ. This means, that we can keep these search functionalities and their development simple. For each one of them we simply need to make some small modifications that result in user interface specific records being searched.

We will specify the relevant details during the development process.

Custom Page Functionality

As part of responding to the visitors, the admins need the ability to assemble custom pages and to insert the result in the post, response to a question, comment or reply, or an email/profile response to a visitor. (The latter is addressed separately in subsections below.)

So, we need convenient access to this functionality through the CMS – preferably so, that a link to this functionality is placed so, that it is always accessible.

Website Parts Formatting Features

Custom Pages

Both website visitors and CMS users also need to be able to put together Custom Pages and insert links to the Custom Pages into posts, comments, questions and replies.

Other than the ability to insert Custom Pages into posts, comments, questions and replies, for the **visitor submissions-related parts** we will want to keep the formatting to a minimum. Inserting URLs into the text and adding Custom Pages are couple of formatting-related features that we do need. Other than that, for the sake of simplicity, we probably want to avoid using advanced formatting features, when the visitor submissions-related parts are concerned.

Built In Functionality and Feature Usage Policy

If we will use WordPress for this project, then as much as possible and feasible, we should also use WordPress built in features and functionality. The same principle applies if we end up using some other software.

However, most importantly, CMS users should have functionality and features available to them so that they can generate results that are formatted the way the mockup HTML pages are.

rel="nofollow" Attribute

All URLs that are inserted through the functionality that is available to the visitors should have the rel="nofollow" included with every link.

When CMS users insert links through the CMS, by default the rel="nofollow" should be included with the link. However, CMS users should have the ability to specify, whether or not the rel="nofollow" is included with the link, and to remove the rel="nofollow" attribute from selected links.

Formatting Features Available to the CMS Users

For **homepage, posts and website section pages** and for the rest of the website we need formatting functionality that is in accordance with the mockups. That is, CMS users need to be able to apply the formatting to the homepage and the rest of the website that is shown on the mockups.

So, we will need formatting tools that help us to publish pages, that are formatted the way the mockups are formatted.

Formatting Features and Developers Obligation

In order to avoid confusion over the relevant topics, I am stating here that unless we will **explicitly, in writing** agree to some other arrangement, it will be the developers obligation to make sure, that the final product will have all the needed formatting features.

That is, based on the specifications files **and** the existing mockups, styles and style sheets, the developers will have to identify, what styles and formatting features are needed, and decide, how they will implement the relevant functionality. The developers will have to make the relevant suggestions and mockups, present them to the customer (service buyer) representatives for review. In this area, the final solutions will be worked out through the negotiations between the developers and the customer's representatives.

As with the rest of the needed functionality, we will agree on the price for this area tasks as well.

If any styles or functionality parts are missing from the final product, the developers will have to add them, without any additional cost, so that the final product is capable of producing the necessary output.

So, I will stress here again, that it is the developers obligation to make sure, that the needed features are in place.

Administrator Structure Setup

Overview

Why Are Admin Groups and Feature Groups Needed?

I will describe two types of work groups in this section – admin groups and feature groups.

CreativityModel Enterprises, Inc. business model is set up so, that this company can benefit and create true and honest earning opportunities to many people from all over the world as CreativityModel Method Consultants and Trainers. This is part of the somewhat unique viral marketing approach that was devised for this company.

Of course, there is no guarantee that this venture will succeed. However, with my efforts, and with input from other people, we can continuously increase the probability that it will succeed.

Soon after launching the website Version 1, I will start looking for people for the first CreativityModel Method Consultants and Trainers online course. Especially the first groups of people will have to be entrepreneurial self starters, who are able and willing to participate in the creativity management and development online solutions providing industry building and in the relevant market development processes.

During the same company development stage, starting probably just slightly later, focus will also be on finding founding team members – business partners, who are able and willing to contribute professionally to the necessary aspects of company development in technology connected environment.

In different capacity, most of these people are expected to use the CMS as well.

I will train people as CreativityModel Method Consultants and Trainers, and also in the future an increasing number of new CreativityModel Method Trainers will train people (including new consultants and trainers).

CreativityModel Enterprises, Inc. will perform such services for free. In turn, during the training process, the trainees are expected to provide various types of assistance, that will also help them to learn more about the creativity management and development online solutions providing business. Among other things, they are expected to provide assistance as website Admins and OrgAdmins. These roles are specified below.

So, Admins and OrgAdmins will be people with whom I will work, but whom I don't know very well. It is likely, that over time there will be very many such people.

Keeping this in mind, having admin groups and feature groups should help us to set up workflow more securely and efficiently.

Admin Groups

I would like to set up the content management system (CMS) so, that the work is done by administrators (admins), who have been divided into groups. We have a *fixed number*, that is, four, admin groups.

Initially I will handle all the administration-related tasks. However, that should start changing within approximately 6 months after the launch of the website Version 1.

I plan to set up the website administration process so, that support personnel (trainees for the most part) will do bulk of the work. However, most of the workflow will be set up so, that before the results appear on the website, or are simply finalized in the back end, they are checked and approved by other, more experienced admins or company's management team members. That is the primary purpose for having **admin groups**.

- Any VisitorID, that should be able to perform CMS tasks, should belong into one of the admin groups before the VisitorID can be allocated to any feature group for task performance purposes.

So, admin groups provide a level of security, and also an overview of the human resources that are available for task performance and work approval purposes.

- Any individual VisitorID can belong to only one admin group at the time.

So, admin groups identify uniquely these VisitorIDs that can perform CMS tasks.

From onset, my VisitorID should be part of the MainAdmin group.

For other three groups – RevAdmin, OrgAdmin and MgtAdmin – we will initially create dummy VisitorIDs. For testing purposes, initially we can also add other VisitorIDs into MainAdmin group.

| Admin Group | Description |
|-------------|--|
| RevAdmin | Concentrates primarily on the review of the visitors submissions. |
| OrgAdmin | <p>Can do all that RevAdmin group members can do.</p> <p>Can approve RevAdmin group members work.</p> <p>This role is intended for people who start out as RevAdmins, do the work well, and are promoted when they are known better, so that they can supervise the RevAdmins work.</p> |
| MgtAdmin | <p>Can do all that OrgAdmin group members can do.</p> <p>Can approve OrgAdmin group members work.</p> <p>Can make changes to most admin groups and to all the feature groups.</p> <p>This role is intended for the company's management team members.</p> |
| MainAdmin | <p>Highest ranking role. Can do everything that MgtAdmin can do, and everything else, that can possibly be done in the CMS.</p> <p>Should be able to lock down the CMS (this is specified below).</p> <p>We will try to set up the workflow so, that relatively few tasks can be performed exclusively by MainAdmin group members, and cannot be performed by other admin group members.</p> |

In the first group, RevAdmin stands for Review Admin. RevAdmin group users review and handle the groundwork of important parts of visitor submissions: questions, comments, replies and inquiries. As such, they have an important role. However, among others, trainees will belong into this group, and some of them may be inexperienced. So, we will want to set up the website Version 1 so, that the RevAdmin group members can

- Do the default processing
- Write replies and responses
- Process the items

RevAdmin group members cannot actually distribute any of the replies and responses by posting them on the website or sending them to the visitors.

Feature Groups

Examples of features that need to be administered through the CMS are homepage updates, adding new blog posts, existing blog posts content, different type of website visitors submissions (questions, comments, replies and inquiries) and ads placement.

Every feature that needs to be administered should belong into a **feature group**.

The purpose of feature groups is to grant access to Admins and OrgAdmins only to specific functionality areas. For example, I may want to grant access to a new RevAdmin at first only to visitor questions, comments and replies review functionality, but not to any blog posts, homepage or ads related functionalities.

We need to set this up so that:

- Every feature, that can be administered through our CMS, has one, and only one, feature group designated to it.

So, on the relevant user interface we probably want to have a drop-down, from which the feature group is selected.

- Only VisitorIDs that belong into an admin group can be assigned to one or more feature groups.

So, we want to set this up so that feature group members can be selected from the total pool of existing admin groups members.

- Only VisitorIDs that belong into a feature group should be able to access that feature group administration-related functionality.

Because we have many features and we may want to replace feature groups with new ones, we need to set up the CMS so, that we can create as many feature groups as necessary.

In the future, a typical feature group may include one or more Admins and OrgAdmins and all MgtAdmin group members.

Administering Admin Groups and Feature Groups

MgtAdmin and higher can administer groups, and groups content, other than MainAdmin group's content. (MgtAdmin and higher means both MgtAdmin Group members and MainAdmin Group members.)

- MgtAdmin and higher can create new feature groups, and for specific features replace any existing feature groups with another feature group.
- MgtAdmin and higher can make changes to RevAdmin group, OrgAdmin group and MgtAdmin group memberships and to all feature groups memberships.

That is, MgtAdmin and higher can add individuals to and delete individuals from any of these three admin groups: RevAdmin, OrgAdmin and MgtAdmin.

Similarly, MgtAdmin and higher can add individuals to and delete individuals from all the feature groups.

Other groups can only review MainAdmin Group's content.

- All four admin groups members should be able to review all admin groups and all feature groups memberships, that is, they should be able to see, who belongs into what group.
- RevAdmin group members and OrgAdmin group members cannot make any changes to any admin group or any feature group memberships; they can only review group memberships.
- RevAdmin group, OrgAdmin group and MgtAdmin group members cannot make any changes to the highest ranking MainAdmin group memberships (review only).

MainAdmin's Role

Only existing MainAdmin group members can add individuals to the MainAdmin group and delete other individuals from the MainAdmin group.

There must always be at least one individual in the MainAdmin group. That is, if there is only one individual in the MainAdmin group, that individual cannot be deleted from the MainAdmin group until at least one additional individual has been added to the MainAdmin group.

From onset, my VisitorID should be part of the MainAdmin group.

MainAdmin should be able to lock down the CMS so that other admin groups and feature groups cannot enter the CMS or use the CMS, and unlock the CMS again, so that other admin groups and feature groups can enter and use the CMS as usual.

Administering Admin Group and Feature Group Members

- Only a registered visitor can be added to any admin group, starting with the RevAdmin group.
- Only MgtAdmin and MainAdmin groups members can add VisitorIDs to admin groups and feature groups.

There is one exception to this: after registration, my VisitorID must be added to the MainAdmin group from onset. Otherwise, the functionality would not work as needed.

- Only a VisitorID that has been added to an admin group can be added to one or more feature groups.

So, this is the relevant sequence:

- 1) A visitor registers, which creates VisitorID for that visitor.
- 2) The visitor's VisitorID is added as admin group member.
- 3) In his or her profile, the visitor can select for the Industry / Activity Area drop-down box's content an entry from the last group, that designates trainees, specialists, consultants, trainers and employees. Similarly, existing MgtAdmin group and MainAdmin group members should be able to modify any visitors Industry / Activity Area drop-down box's content as needed.

MgtAdmin and MainAdmin group members can assign that VisitorID to one or more feature groups.

MgtAdmin and MainAdmin group members can move that VisitorID from one admin group to another, but it can belong into one admin group at the time.

For this we need functionality that provides overview of the admin groups content and feature groups content.

Additionally, we need (a) VisitorID CMS administration history tracking and (b) task performance coverage tracking. Admin group history tracking features are described in this subsection (below). Task performance coverage tracking is described in the Administrators Activities section.

VisitorID Deletions

MgtAdmin groups members should be able to delete VisitorIDs from RevAdmin, OrgAdmin and MgtAdmin groups and from all the feature groups.

MainAdmin groups members should be able to delete VisitorIDs from all the admin groups and from all the feature groups.

When a VisitorID is deleted from a feature group, that VisitorID should not be deleted from any other table.

When a VisitorID is deleted from the list of administrators, that VisitorID should be also deleted from every feature group table.

Only MainAdmin group members should be able to delete VisitorIDs directly from the profile table.

We do not need any orphan records. Therefore, when a VisitorID is deleted from the profile table, all the relevant records should be deleted from every table where that VisitorID was used, including the table that holds admin group and feature group history.

Only MainAdmin group members should be able to delete VisitorIDs directly from the table that holds admin group and feature group history.

VisitorID Administration Related Table Structure

There is more than one way to set up the functionality that I am describing in this subsection. If you have suggestions for a different setup, please let me know.

- 1) We need a table for admin groups. Let's call it tblAdminGroups. There should be four records in this table.
- 2) We need a table for feature groups. Let's call it tblFeatureGroups.
- 3) We should probably have one table for admin group members. Let's call it tblAdminGroupMembers. VisitorID entries in that table must be unique.
- 4) We should probably have one table for feature groups members. Let's call it tblFeatureGroupMembers. VisitorID entries in that table do not have to be unique.
- 5) We should have one table for VisitorID assignment history. Let's call it tblAssignmentHistory. This table is needed for tracking any VisitorID admin group and feature group membership changes.

Additional tables will be needed for carrying out content management related tasks.

User Interfaces That Are Needed

We need a user interface for displaying the admin groups. Very similarly to the data that is shown above in the Admin Groups subsection, two fields should be displayed, Admin Group and Description. We do not add or delete admin groups.

We need a user interface for feature groups. We want to display data there similarly to admin groups (Feature Group and Description fields). We both add and delete feature groups. (Relevant admin groups and permissions are specified above, in the previous subsections.)

We need a user interface for admin group members. We add and delete admin group members; relevant permissions are specified above, in the previous subsections.

We need a user interface for feature group members. We add and delete feature group members; relevant permissions are specified above, in the previous subsections.

VisitorID History Tracking

We want to keep track of who and when added what VisitorID to what admin group and feature group, or deleted from an admin group or feature group. That is, we need to keep track of VisitorID-related history.

This functionality should function so, that every time a VisitorID is added to or deleted from an admin group or feature group, that action triggers a record creating in the history table. (As is stated above, at least here, in the specs, I'm calling the history table tblAssignmentHistory.)

For example, when a VisitorID is first added to RevAdmin group (or any other group), that should trigger an entry to the tblAssignmentHistory. Similarly, that VisitorID, that was first added to the entry level RevAdmin group, is promoted to the OrgAdmin Group member, we want to document when that change was made and who made it.

Similarly, we want to document, when that VisitorID was assigned to any feature group, and who assigned it to what feature group.

It seems, that this table needs the following fields:

- PrimaryKey (or however you call in the relevant software the unique identifier field)
- Date/Time – Date and time stamp of the action that was taken
- ActionVisitorID – VisitorID of the person who took the action (who added or deleted VisitorID)
- ActionFirstName – First name of the VisitorID who took the action
- ActionLastName – Last name of the VisitorID who took the action
- AddresseeVisitorID – VisitorID of the person who was added or deleted
- AddresseeFirstName – First name of the VisitorID who was added or deleted
- AddresseeLastName – Last name of the VisitorID who was added or deleted
- AddedTo – Yes/No column, Yes means that the record was added to an admin group or a feature group.
- DeletedFrom – Yes/No column, Yes means that the record was deleted from an admin group or a feature group.
- AdminGroupAdded – If the action was related to adding VisitorID to an admin group, specify the admin group.
- AdminGroupDeleted – If the action was related to deleting VisitorID to an admin group, specify the admin group.
- FeatureGroupAdded – If the action was related to adding VisitorID to a feature group, specify the feature group.
- FeatureGroupDeleted – If the action was related to deleting VisitorID to a feature group, specify the feature group.

These fields should also be on the relevant user interface.

The first and last names can be carried over from the profile table.

The AddedTo and DeletedFrom columns are somewhat redundant, but I would like to have them anyway, because I believe that they simplify the data reviewing processes. Further, we could use only one column for AddedTo and DeletedFrom, but I would prefer having two separate columns.

With admin groups, we can move VisitorIDs from one group to another. We can record this in two ways, both are equally good from my prospective.

Let's say, a VisitorID is promoted from RevAdmin to OrgAdmin group membership. This would mean a change in the table for admin group members (Above I call this table tblAdminGroupMembers.)

On the relevant user interface it would only mean change in the drop-down, in the record that has this specific VisitorID's record, in the field that specifies into which admin group the person belongs to.

That action should trigger also an addition of either one or two records to the tblAssignmentHistory table.

Option 1. The first record, that is added to the tblAssignmentHistory table, states that VisitorID was deleted from RevAdmin group. The second record, that is added to the tblAssignmentHistory table, states that the same VisitorID was added to the OrgAdmin group.

Option 2. Only one record is added to the tblAssignmentHistory table, that states that the VisitorID was added to the OrgAdmin group.

Because we didn't really delete this VisitorID from the RevAdmin group, both options are OK, as far as I am concerned.

However, when it comes to adding and deleting VisitorIDs from feature groups, then we must record both additions and deletions, because both of them do actually take place, and can take place independently of each other.

CMS Login

Let's set the CMS up with a separate login, so that we can track who and when logged in to and out from CMS.

Username is publicly visible and accessible. Therefore, just like main website login, CMS login should probably require filling in the following three fields: Username, Email on file, Password.

We also need CMS login related VisitorID/username and password administration tools for this purpose. We need to be able to review, add and delete VisitorIDs/usernames that can log in to CMS, and CMS login passwords. However, we need to set this up based on the following principles.

CMS User Administration

Access and Functionality Usage

RevAdmin and OrgAdmin groups members should not have any access to username and password review, addition or deletion functionality. To put it differently, RevAdmin and OrgAdmin groups members should not have any access to CMS User Administration functionality.

MgtAdmin group members should be able to access CMS User Administration functionality. MgtAdmin group members can add usernames and assign initial passwords, but should not be able to do anything else in the CMS User Administration functionality area.

MainAdmin group members should be able to access CMS User Administration functionality and should be able to use all CMS User Administration functionality features. This means, that the MainAdmin group members should be able to review, add, and delete users, usernames and passwords.

Password Change

We should set the CMS login up so, that the main website login, and CMS login require different passwords. That is, we want to add a small piece of functionality that compares the CMS passwords, before accepting and storing them. If the main website and CMS password are the same, the user should be asked to select a different password than the main website login has.

We probably want to set up the CMS access so, that when the initial password is assigned, on the first login the user is prompted for password change.

For this purpose we want to have a Yes/No column. If this column's entry is Yes, the functionality asks the user to change password at login and then stores the new password after verifying, that it does not match the main website password. Having it set up this way allows to prompt users for password changes when necessary.

For CMS username we want to use the same username that the visitor selected during the website profile creating (which must be one word). Similarly, we want to use the same email address for authentication purposes.

Uniform VisitorID Usage

CMS records that deal with people must also be tied to the same VisitorIDs that are being used on the website. We do not want to create duplicate people IDs.

Administrators Activities

Overview

In this area the primary objective is to track the work that needs to be done, and to alert designated administrators if either certain work has not been performed within designated times, or if no coverage is detected, that is, if nobody seems to be doing the work as planned.

Website visitors submissions (for example, questions, comments, replies and inquiries) create activities for administrators. We want to handle these submissions within designated time intervals (usually at the most within 2 business days).

Further, we want to make sure that there is adequate coverage for handling the needed tasks.

- To put it differently, we need functionality that provides overviews of the work that needs to be done.
- In order to organize the workflow, together with it, we need functionality that
 - provides an overview of the human resources that are available for content management purposes
 - allows to schedule human resources
 - helps to spot gaps between the work that needs to be done and scheduled human resources

As part of the same approach, we have to prepare for instances, when there are higher than expected workloads to handle.

We don't know for sure, whether or not there ever will be high volume workload days for CreativityModel.com website content management. However, just in case we have to prepare for such situations, because if they do occur and this company is not ready to handle them, that unpreparedness can create very serious problems.

This section addresses these areas.

MgtAdmin and higher should be able to administer (add, delete, modify) the functionality outlined here, but all admin groups members should be able to review it.

Couple of definitions: In conjunction with the main website, I use the word "visitors." That is, all the people who open the site are website visitors, including, for example, this company's employees. In the CMS, I am using the word "users," because people use the CMS in order to get the work done. This wording should also help to differentiate between the intended website and CMS functionality features.

Workload Handling Sequence: CMS User's Side

We want to set up the CMS login so, that after the login the CMS user sees right away the work that needs to be done. On that review screen, before proceeding further, the user must acknowledge that he or she has reviewed the work that needs to be done (we can use a checkbox and a button for that purpose).

So, the workflow handling sequence should be roughly the following:

- Login
- Review and take ownership of tasks. During a login, the taking ownership of tasks part can be repeated as needed.
 - Review the work to be done in all feature groups, with the focus on the work in your designated feature groups.
 - Take ownership of the tasks to be handled: currently handling, tentatively scheduled to handle.
 - Acknowledge that the tasks were reviewed.
- Handle the tasks
 - Handle tasks one task at the time. Productivity is automatically measured and recorded.

- As applicable, review tasks again and take ownership of the next task. Repeat as many times as applicable.
- Log out
 - If task is left incomplete, and if applicable, assign the task to a specific individual. Incomplete tasks go back on the review board, so that the remaining workload is counted for as tasks that need to be handled.

Workload Handling Sequence: Data Flow

- The incoming workload should be measured and recorded once every 24 hours. This is needed for making sure, that the daily processed and incoming workload numbers add up.

The measurement and recording processes can be rather simple; this topic is further addressed below.
- CMS users should receive information about the current workload dynamically, based on the actual workload at any given point in time.
- A CMS user can take ownership of tasks, one task at the time.

As a special case, a person should be able to open multiple browser instances and to log in under different VisitorIDs (that is, usernames). We want to reserve this option for situations where it is needed.
- When a user takes ownership of a task, that task should be blocked so that other users cannot take ownership of it. This also means, that other users cannot access the task, because only a user who has taken ownership of a task can access it.

Briefly, we do not want multiple people working on the same task simultaneously.

Similarly, we do not want any one user – that is, VisitorID – to be able to work on more than one task at the time.
- MgtAdmin group members should be able to override current task ownership and reset the task ownership for individual tasks for these tasks, whose current owner VisitorID belongs to RevAdmin or OrgAdmin group, but not if the task's VisitorID belongs to MgtAdmin or MainAdmin group.

Similarly, MgtAdmin group members should be able to disconnect from CMS usage and lock out from further CMS usage individual VisitorIDs that belong to RevAdmin or OrgAdmin group, but not VisitorIDs that belong to MgtAdmin or MainAdmin groups.

Only MainAdmin group members should be able to remove such lockouts.
- MainAdmin group members should be able to override current task ownership and reset the task ownership for individual tasks for these tasks, whose current owner VisitorID belongs to RevAdmin, OrgAdmin or MgtAdmin group, but not if the task's VisitorID belongs to MainAdmin group.

Similarly, MainAdmin group members should be able to disconnect from CMS usage and lock out from further CMS usage individual VisitorIDs that belong to RevAdmin, OrgAdmin or MgtAdmin group, but not VisitorIDs that belong to MainAdmin groups.

Only MainAdmin group members should be able to remove such lockouts.
- When a user tentatively schedules tasks for him or herself, that should not affect other CMS users ability to take ownership of the tasks. Tentative scheduling should be recorded, so that the relevant information can be displayed, but any other user should be able to take ownership of other user's tentatively scheduled tasks as well. So, tentative scheduling is simply like flagging.
- A user should be able to complete some items in an individual task, and assign the rest of the items to somebody else, or end the task handling process so, that some items in a task are left unhandled.
- Any task's items that were left unhandled should go back to the Workload Review and Management board, where the users can review and take ownership of tasks.
- Task starting and completion times, as well as task item completion quantities and the relevant productivity should be recorded for review purposes.

Workload Measuring and Recording

Workload Measuring

It seems to me, that the best way to measure current workload is based on items IDs.

In the table structure, each item category – posts, different type of inquiries, questions, comments, replies, questionnaires and so on – should have the primary key field set up so, that the primary field type is AutoNumber. That is, this field type should be such, that for each new record the previous number is extend by 1 (previous number + 1).

Depending on the software that will be used, the name is being used for this field type may differ, but the basic principle should be the same.

So, if we measure records at certain intervals, and in the beginning of the interval the ID is, let's say, 1000, and at the end of the interval the ID is 1010, we can conclude that 10 new records were added in this category.

Similarly, we could store the total numbers of records, and then calculate the number of new records based on these figures. However, in this case, the ID based measuring may yield more accurate results.

Measuring and Recording Intervals

I would like to set up the workload measurements and recording so, that the workload measurement and recording process takes place once every 24 hours. We should schedule that, for example, for 2 a.m. EST daily.

Workload should be measured and recorded by task categories.

User Interfaces Needed

- Workload Review and Management
 - Recorded Workload Review – provides information about the recorded workloads.
As an exception, only MgtAdmin and MainAdmin group members should be able to access this information.
 - Unhandled Workload Review – CMS user reviews the tasks to be done. All tasks should be displayed. Logged in user 's designated feature groups should be identified. Areas that require urgent attention should be highlighted.
 - Task Handling Commitments – Take ownership of the tasks to be handled, one task at the time. Tentatively schedule tasks for yourself for the current login. Without taking ownership cannot access the task handling functionality (can take ownership of tasks and access tasks one at the time). MgtAdmin and higher can override current ownership and, if needed, lock the VisitorID out, reset the task ownership.
 - Current Task Handling Review – who is logged in, who is currently handling what tasks, who is tentatively scheduled to handle what tasks.
- Workload and Resource Matching
 - Workload Estimation Template – estimate workloads.
 - Labor Resource Scheduling – schedule people.
 - Labor Resource Productivity – who did what and when, how much individual people accomplished. Productivity is automatically measured and updated upon completion of a task.
 - Workload and Labor Resource Matching Overview – Comparison of (a) Workload Estimation Template figures, (b) Labor Resource Scheduling results, and (c) Labor Resource Productivity results.

Must accommodate for the estimated workload multiple scheduled VisitorIDs schedule and productivity data. So, we probably want to show data vertically, one task area at the time, not horizontally, even though the latter would make a better view.

Based on (a) estimated workload, (b) specific scheduled login hours, and (c) the past performance statistics, CMS user needs to be able to determine, whether or not the scheduled labor resources are adequate for the estimated workflow.

Administrators Submissions

Overview

In this area the primary objectives are to add website content and to track and approve the work that was done by less experienced support personnel. We want to be able to track who did what and when, and approve the work that has been done, before the results are finalized in the back end and/or appear on the website.

Visitor Entry Filtering Related Information Flow

As is described in the main website specs file, in the Visitor Entry Filtering System subsection, all website visitor submissions except questionnaires should be filtered against two lists of terms: Offensive Terms List and Potentially Offensive Terms List. The matching results should end up on either Deleted Offensive List or Quarantined Offensive List. Additionally, the visitor will be notified about the entry, and a record will be added to the visitor's profile.

The purpose of this is to separate these visitor entries, that may contain offensive language, from the rest of the visitor entries. Through the Content Management System, the separated entries will be dealt with as lower priority tasks. That is, we want to address and get posted these entries faster, that seem to be fully legitimate and are more likely to contain content that is in accordance with the website's purpose. Further, in the future different personnel may handle different types of entries.

Item Categorization and Category Based Response System

In some instances admins may have to communicate with the visitors in response to submitted questions, comments, replies or inquiries, or for other reasons.

As much as possible, we want to minimize the time and effort that is needed for such communication. Accordingly, CMS functionality should

- enable the admins to gather submitted entries into groups (through a relatively simple structure that provides drop-downs for gathering items into groups)
- enable the admins to respond to a group with a single response
- enable the admins to use pre-written responses that can either be sent as is, or can be modified as needed before they are sent out.

The relevant functionality is further explained below.

Communicating With The Visitors

Means of Communication

Blogging tools enable the admins to communicate with the visitors. Additionally, the admins should be able to send visitors messages – for example, if needed, in response to submitted inquiries, questions, comments or replies.

Further, the admins should be able to search for a visitor or visitors, and send a message to one or more selected visitors.

We want the admins to have two ways of sending such messages: posting in the visitor's profile and sending an email.

We should set up the communication processes so, that in most instances messages to the visitors are posted only in the visitors profile pages. This will help us to lower the number of outgoing emails and will hopefully also be considered less annoying by the visitors.

In addition, there will be instances, when emailing is needed.

Single Communication Unit

Ideally, from the development prospective, we will have one functionality piece for sending messages to the registered visitors. Then, if we need to make changes to that functionality piece, we can make the changes in only one place. However, from CMS usability prospective this functionality has to be integrated with different user interfaces.

This functionality piece should have the following options for sending the message

- To profile only (default option)
- Both to profile and via email
- Via email only

Emailing related comment: When the application sends out emails, it may happen, that for some visitors the email field's content is for some reason unusable (for example, is blank). Similarly, it may happen, that emailing is not possible for some reason (for example, emailing causes an error of some sort).

Whenever emailing is not possible to either some visitors among the selected group, or to all the visitors among the selected group, the application should post the message in the visitor's profile regardless of the message sending option that was chosen by the message sending admin.

To put it differently, this functionality should be set up so, that when emailing option is chosen, for all these visitors to whom emailing is not possible, the application posts the message in the visitor's profile.

Further, the application should both notify the relevant admin about its actions and record its actions.

Ads Management

Ads Management Overview

Definitions

- Ad display general location – on the side pages, one of the 4 locations where ads are displayed:
 - 1) in the left-hand column, currently titled Other Materials, with blue background
 - 2) on the top of the page
 - 3) in the bottom of the middle column
 - 4) and in the right-hand column, currently titled Other Materials, with blue background.

The current homepage design does not contain any ad display general locations.

Please see the mockups for additional information.

- Ad display spot – within an ad display general location, each of the individual locations, or spots, that is designated for advertisement display.
- Ad category – could be, for example, an image, text ad, single link, link group, link unit, or video.
- Ad dimensions – width and height of an individual ad.
- Outside ad – an ad, that originates from an outside ad agency, such as Google (AdSense), or any other outside ad agency whose ads this company displays on its website.
- Outside ad source – outside ad agency, such as Google AdSense, whose ads this company displays on its website.
- Outside ad type – an outside ad that is defined by ad source, ad category, ad dimensions, ad type name and code that is used for displaying the ad.
- Inside ad – an ad, that this company owns.
- Inside ad array – an array of inside ads (our own ads) of the same ad type, that is, inside ads that can be displayed in a designated ad display spot.
- Ad placement page group – Layout, that defines for all 4 ad display general locations, and for all the ad display spots within these 4 ad display general locations, the characteristics of the ads that are being displayed on the pages that belong into the ad placement page group.

Objectives

Ads are one of the first revenue centers that this company can put in place cost effectively. Other revenue centers are likely to follow: affiliate marketing, sponsorships, product evaluations and promotions, and others.

Most business activities are cost centers. SEO, for example, is somewhat similarly to website marketing a cost center, not a revenue center. Revenue and, of course, even more importantly profitability, are vitally important to this company's development.

So, ads management is a tremendously important part of the website development work.

For Version 1, ads management is one of the most important parts of the overall website development project.

The objectives in this area are to be able to do the following:

- Maintain a somewhat consistent overall look throughout the site, while allowing for differences within the ad display general locations.

On the side pages we will have 4 – that is, a fixed number – general locations for ads. These general locations can be seen on the mockups, and are listed in the above Definitions subsection.

Homepage does not contain any ad display general locations.

- Set up the general locations of the ads so, that the website template columns have maximum width, but no maximum height. Correspondingly, this means that in each of the general locations we can have ads with maximum width, but no maximum height.

If one of the general locations that has ads increases in height, that should not affect at all other columns and areas that are next to the column, where the general location is, that increased in height.

For example, if the general location where the ads are placed in the left-hand column increases in height, then that should not affect anything at all in the middle or right-hand column. The same applies to every other column and general area that holds ads.

Similarly, if one of the general locations that has ads increases in height, that should not affect at all anything that is above the area, where the general location is, that increased in height.

The increase in height should affect everything that is below the area, where the general location is, that increased in height, by pushing the content below it lower.

- Be able add ad display spots – individual locations – within each general location. An ad display spot is an individual location within an ad display general location, where one ad, surrounded by a border, or one or more links, surrounded by a border, can appear.

For example, on the side pages, in the left-hand column's Other Materials section, we would want to be able to add, as needed, vertically additional ads or areas with links.

Similarly, we should be able to delete, and temporarily not use, any ad display spots within the general locations.

For example, on the mockups, in the left-hand column there are currently shown 5 ads + 2 areas with links. We should be able to show there, let's say, 4 ads, or 6 ads, and, if needed, more than 3 areas with links, so that all the adds and areas with links are consistently surrounded by a border.

The numbers of ads or link areas that are displayed within each general area that holds ads should be changeable through the CMS.

- The CMS should be set up so, that based on the ad's width, the CMS determines whether or not the ad can be displayed in an ad display spot.
- In addition to using ads that originate from outside agencies like, for example, Google AdSense ads, we want to be able to use also inside ads, which are ads that this company owns.
- For inside ads, be able to allocate ads into groups, so that each group consist of one or more ads. Each group should work as an array, so that ads are selected from the array randomly.

We should be able to change the content of the inside ad arrays that we have created.

- The inside ad arrays should be used so, that one ad from the array is selected randomly every time the code is activated that uses the array. The code should be activated every time the page, that uses the code, is loaded or refreshed.

That is, we want to create some variety to the pages by using arrays, so that for the spots, that display inside ads, one ad is selected randomly from the relevant array.

- Use inside ads together with outside ads.

That is, for each ad display spot, we want to be able to designate either an outside source, like, for example, Google AdSense, or an array of inside ads.

For example, in the left-hand column, in the top-most position, we may want to have an ad from Google AdSense. In the second position (vertically), we may want to have an inside ad.

For some pages we may want to use exclusively only inside ads. Similarly, for some pages we may want to use exclusively only outside ads.

- Be able to add outside sources. We will start with Google AdSense and inside ads. However, we should be able to add other sources as well. Ad width will be a limiting factor, and that is OK. Further, it is

understandable, that some additional code may be needed for displaying ads from other outside sources. However, other than that, we should be able to add other outside sources to our list of outside sources as well.

From the development prospective, the important point to take into consideration is, that we have to develop the relevant functionality so, that we can use different sources of ads for each of the ad display spots.

- Form ad placement page groups, so that we can define for each ad placement page group:
 - Which pages that are displayed on the Site Map belong into that ad placement page group
 - For each general location the total number of ad display spots within that general location
 - For each ad display spot within a general location the ad type and ad source.

As is stated above, all pages should have 4 general locations for ads, but the total number of ad display spots within each general location can vary. Similarly, each ad display spot's ad source may vary.

Within an ad placement page group, the ads are placed based on the same principles. That is, the total number of ad display spots is the same, and each ad display spot's ad source is the same.

- Each individual page on this site can belong into one ad placement page group at the time.
- Each individual page on this site should by default belong into Default Ad Placement Group. To put it differently, by default all pages should belong into one and the same ad placement page group that is called Default Ad Placement Group.

Only these pages, that have been assigned into different ad placement page groups, should display ads differently from the Default Ad Placement Group, in accordance with their designated ad placement page group's settings.

So, pages that belong to different ad placement page groups may display different ads in specific ad display spots.

For example, in the left column, one ad placement page group may have one ad source for the topmost ad, and another ad placement page group may have another ad source for that spot.

The idea here is, that we want to have the same default settings for all the side pages. However, for certain pages – for example, the non-blogging sponsorship, product evaluation and promotion pages – we may have to use different ad sources.

For example, a sponsor may not want us to use Google AdSense for the page that is used for marketing that sponsor's products or services. However, that sponsor may agree to us using inside ads in these spots, so that the page looks consistent with other pages within the site, but does not market any potentially competitive products or services.

Similarly, I intend to test different types of ads in different types of locations, in order to determine, which ads and what combinations of ads are likely to generate the best clickthrough rates.

- In each ad display spot we always want to display an ad.
- At any given point in time, there can be only one designated outside ad source per an individual ad display spot.
- In each ad display spot, if there is an outside ad available that can be displayed at the ad display spot, the outside ad should be displayed. If not, our own ad should be displayed.

To put it differently, for each ad display spot for which an outside ad is not available, inside ad should be displayed so, that the ad is selected randomly from a inside ad array of a matching ad type.

That is, we need a functionality, that automatically displays inside ad if – and only if – the outside source that has been designated for the ad display spot, like, for example, Google AdSense, does not have an ad for that ad display spot. However, if the outside source, that has been designated for that ad display spot, does have an ad for that location, then the outside source ad should be displayed.

Briefly, we don't want to have situations, when a page shows up without any ads, or borders, that are supposed to be around ads, show up without ads. This would look bad, and especially when the top of the page banner is concerned.

Inside Ad Creating Principles

Already before launching website Version 1, we will create inside ads. The first sets of inside ads will most likely advertise different aspects of CreativityModel™ Method – its features and benefits. Similarly, we will create ads that advertise the features and benefits that TechnologyConnectedCompany.com offers. Further, we will also market CreativityModel Enterprises, Inc. company development related topics, like CreativityModel Method Specialist, Consultant and Trainer's courses and opportunities, business opportunities that this company offers, and other similar subject matters.

From there, we will most likely start expanding into offering selected services to other companies as well.

Just like the outside ads, the ads that we will create, will also link content. That is, each of inside ads should be clickable and should take the visitor to a designated URL.

So, the Content Management System has to provide functionality for determining the URL-s for each or inside ads.

Ad Types

Unless we decide differently, we probably want to develop inside ads using the same dimensions (sizes) that Google has listed for its AdSense ads.

The original ad examples are in

https://www.google.com/adsense/static/en_US/AdFormats.html?sourceid=aso&subid=ww-ww-et-asui&medium=link

This is an initially planned list of ad types. We may make changes to this list, either because Google makes changes to its own ad sizes and types, or we decide for internal purposes to make changes, or because we will work with other sources of ads in addition to Google, or instead of Google.

So, the relevant Content Management System functionality has to take this into consideration.

- Small Square 200 x 200 Link Unit Up to 5
- Small Square 200 x 200 Link Unit Up to 4
- Small Square 200 x 200 Text Ad
- Small Square 200 x 200 Image
- Leaderboard 728 x 90 Image
- Banner 468 x 60 Text Ad
- Banner 468 x 60 Image
- Link Unit 468 x 15 Up to 4 links
- Link Unit 468 x 15 Up to 5 links
- Large Rectangle 336 x 280 Image
- Large Rectangle 336 x 280 Text Ad

Until we will decide to proceed differently, we will not create video ads. We will create only image ads. However, from the beginning we should be ready to use video ads produced by outside sources.

Ad Creating and Displaying Summary

So, we need functionality for the ads placement, including (1) putting the right ads where needed and (2) mixing, as needed, outside and inside ads.

Further, we need functionality that both places the content on the pages correctly, **and** allows us to administer changes to ad placement page groups. Among other things, this functionality should allow us to make changes to the sets of inside ads that will be displayed, and sources of outside ads.

The mockups contains ads that are located so, that all the different types of ads, that do fit on the page, given their dimensions, are represented either once or twice. The ads are represented once per column, but because the left and right hand column ads are duplicates, they are actually represented twice per side page.

Similarly, in the production environment, we may use the same ad more than once per page. However, this still means, that we need to be able to define the ad type and source for each ad display spot within the general locations. As needed, we will simply repeat the ad types and sources per page.

Ads Management Mockups

For the ads management we need to set up a user interface that contains a series of inter-dependent subject matters and their individual smaller user interfaces. These subject matters inter-dependent in a sense that, for example, an ad source needs to be listed before it can be used as a criteria for other ads management parts. The same applies to most of the other subject matters addressed here.

We probably want to set up these individual subject matters through a series of user interfaces, that are all accessible through the same main user interface. On the main user interface, the individual user interfaces can be arranged vertically somewhat similarly to the way they are shown here.

This user interface should be set up so, that only MgtAdmin and higher level users have access to it. However, as is indicated below (and similarly to other content management system subsections), selected functionality parts are restricted to MainAdmin usage only.

Briefly, we want to avoid situations where unauthorized users make accidental changes to the ads management functionality.

Further, we should set up the ads management functionality so, that whenever changes have been applied by MgtAdmin or higher level user, the new settings become effective immediately.

The admins will work with outside and inside ads. The content management system should function so, that the admins can work with the outside and inside ads as uniformly as possible, while also being able to differentiate between the outside and inside ads as needed.

Ads Management

The objective of ads management is to form ad placement page groups, that for the website side pages define the characteristics of the ads that are being displayed.

Through the Site Map management tool each of the pages that appears on the Site Map is designated into an ad placement page group.

Whenever new ad sources, categories, types, inside ads or inside ad arrays become available, enter them into the appropriate lists as soon as possible, so that they are available for usage when needed.

Before checking off a new ad placement page group as "ready for use," make sure that all of its characteristics have been defined correctly.

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Common Characteristics of Ad Groups

- List of Ad Display General Locations

- List of Ad Placement Page Groups

- Characteristics of Ad Placement Page Groups

Common Characteristics of Ads

List of Ad Categories

List each ad category individually. Each ad category should be listed only once.

| ID | SR | Category Name | Ready | By Whom | Date | Comments |
|----|--------------------------|---------------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Username | Date field | Text field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete the Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Category name – For example, image, text ad, single link, link group, link unit, or video.
- Ready – Indicates, whether or not the ad category can be listed in the drop-downs that are part of other user interfaces.
- By Whom field should be stamped with that admin's Username who clicked the "Enable Selected Records" or "Disable Selected Records" button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
This field should be disabled (read only).
- Date – Date when the "Enable Selected Records" or "Disable Selected Records" button was clicked, in mm/dd/yy format.
This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Category Name field values.

MgtAdmin and higher can use the "Enable Selected Records," "Disable the Selected Record" buttons and "Delete Selected Records" buttons.

- When the "Enable Selected Records" button is clicked, the selected record(s) Ready field should be checked off.
When the Ready field is checked off, the record should appear among the entries in the Ad Category drop-downs that are part of other user interfaces.
- When the "Disable Selected Records" button is clicked, the selected record(s) Ready field should be cleared, that is, it should not be checked off.
When the Ready field is not checked off, the record should not appear among the entries in the Ad Category drop-downs that are part of other user interfaces.
- When the "Delete Selected Records" button is clicked, the selected record(s) should be deleted.

List of Ad Dimensions

List each ad dimensions record individually. Each ad dimensions record should be listed only once.

| ID | SR | Dimension | Ready | By Whom | Date | Comments |
|----|--------------------------|------------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Username | Date field | Text field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete the Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Dimension – For example, 200 x 200, 336 x 280, 468 x 15, 468 x 60, 728 x 90.
- Ready – Indicates, whether or not the ad category can be listed in the drop-downs that are part of other user interfaces.
- By Whom field should be stamped with that admin's Username who clicked the "Enable Selected Records" or "Disable Selected Records" button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
This field should be disabled (read only).
- Date – Date when the "Enable Selected Records" or "Disable Selected Records" button was clicked, in mm/dd/yy format.
This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Category Name field values.

MgtAdmin and higher can use the "Enable Selected Records," "Disable the Selected Record" buttons and "Delete Selected Records" buttons.

- When the "Enable Selected Records" button is clicked, the selected record(s) Ready field should be checked off.
When the Ready field is checked off, the record should appear among the entries in the Ad Dimensions drop-downs that are part of other user interfaces.
- When the "Disable Selected Records" button is clicked, the selected record(s) Ready field should be cleared, that is, it should not be checked off.
When the Ready field is not checked off, the record should not appear among the entries in the Ad Dimensions drop-downs that are part of other user interfaces.
- When the "Delete Selected Records" button is clicked, the selected record(s) should be deleted.

Outside Ads

List of Outside Ad Sources

List each outside ad source individually. Each outside ad source should be listed only once.

| ID | SR | Source Name | Ready | By Whom | Date | Comments |
|----|--------------------------|-------------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Username | Date field | Text field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Source Name – For example, Google AdSense.
- Ready – Indicates, whether or not the ad can be listed in the List of Outside Ad Types user interface, in the Ad Source drop-down.
- By Whom field should be stamped with that admin's Username who clicked the “Enable Selected Records” or “Disable Selected Records” button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
This field should be disabled (read only).
- Date – Date when the “Enable Selected Records” or “Disable Selected Records” button was clicked, in mm/dd/yy format.
This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Source Name field values.

MgtAdmin and higher can use the “Enable Selected Records,” “Disable the Selected Record” buttons and “Delete Selected Records” buttons.

- When the “Enable Selected Records” button is clicked, the selected record(s) Ready field should be checked off.
When the Ready field is checked off, the record should appear in the Ad Source drop-down that is part of the List of Outside Ad Types user interface.
- When the “Disable Selected Records” button is clicked, the selected record(s) Ready field should be cleared, that is, it should not be checked off.
When the Ready field is not checked off, the record should not appear in the Ad Source drop-down that is part of the List of Outside Ad Types user interface.
- When the “Delete Selected Records” button is clicked, the selected record(s) should be deleted.

List of Outside Ad Types

Each outside ad type should be listed, but only once.

Even when the Ad Category and Ad Dimensions are the same, if the Ad Source differs, the Outside Ad Type must be defined as an individual record.

| ID | SR | Ad Source | Ad Category | Ad Dimensions | Ad Type Name | Code | Comments |
|----|--------------------------|-----------|-------------|---------------|--------------|------------|------------|
| | <input type="checkbox"/> | Drop-down | Drop-down | Drop-down | Text field | Text field | Text field |

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Ad Source, Ad Category and Ad Dimensions are drop-downs that contain the content of their respective lists.
- Ad Type Name – For example, Small Square 200 x 200 Link Unit Up to 5, Leaderboard 728 x 90 Image, Banner 468 x 60 Text Ad, and so on.
- Code field should contain the code that needs to be placed in the page where the outside ad appears.

Buttons and Functionality

Sort by Ad Source, Ad Dimensions, Ad Category, Ad Type Name.

MgtAdmin and higher can use the “Delete Selected Records” button to delete records.

Ads Management functionality should be set up so, that when an Outside Ad Type record is deleted, all inside ads and arrays that have been matched to it, will continue to function without errors.

Inside Ads

List of Inside Ads

List each inside ad individually. Each inside ad should be listed only once.

| ID | SR | Matching Outside Ad Type | Ad Category | Ad Dimensions | Inside Ad Name | Location | Link To | RD | By Whom | Date | Comments |
|----|--------------------------|--------------------------|-------------|---------------|----------------|------------|---------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Drop-down | Drop-down | Drop-down | Text field | Text field | URL | <input type="checkbox"/> | Username | Date field | Text field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Matching Outside Ad Type – Drop-down that contains the List of Outside Ad Sources entries.
- Ad Category – Drop-down that contains the List of Ad Categories entries.
- Ad Dimensions – Drop-down that contains the List of Ad Dimensions entries.
- Inside Ad Name – This can be any unique name.
- Location – This field helps to keep track of the ads in case we will store them in different folders.
- Link To – URL that links inside ads to designated URL.

This field should have by default homepage value. To put it differently, when a new record is generated, that is, when an inside ad is added to the List of Inside Ads, the Link To field value should be by default set to homepage.

For the inside ads, Link To field value can be changed on the inside ad, inside ad array and on the ad placement page group level.

- RD – Stands for Ready and indicates, whether or not the ad can be listed in the Characteristics of Inside Ad Arrays user interface, in the Image Name drop-down.
- By Whom field should be stamped with that admin's Username who clicked the "Enable Selected Records" or "Disable Selected Records" button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

This field should be disabled (read only).

- Date – Date when the "Enable Selected Records" or "Disable Selected Records" button was clicked, in mm/dd/yy format.

This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Matching Outside Ad Type, Ad Category, Ad Dimensions, Inside Ad Name, Ready field values.

We will probably make at least one inside ad for each List of Outside Ad Types value. We may also make inside ads that do not have any matching List of Outside Ad Types values.

MgtAdmin and higher can use the “Enable Selected Records,” “Disable the Selected Record” buttons and “Delete Selected Records” buttons.

- When the “Enable Selected Records” button is clicked, the selected record(s) Ready field should be checked off.

When the Ready field is checked off, the record should appear in the Image Name drop-down that is part of the Characteristics of Inside Ad Arrays user interface.

- When the “Disable Selected Records” button is clicked, the selected record(s) Ready field should be cleared, that is, it should not be checked off.

When the Ready field is not checked off, the record should not appear in the Image Name drop-down that is part of the Characteristics of Inside Ad Arrays user interface.

- When the “Delete Selected Records” button is clicked, the selected record(s) should be deleted.

List of Inside Ad Arrays

List each inside ad individually. Each inside ad should be listed only once.

| ID | SR | Matching Outside Ad Type | Array Name | Location | Ready | By Whom | Date | Comments |
|----|--------------------------|--------------------------|------------|------------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Drop-down | Text field | Text field | <input type="checkbox"/> | Username | Date field | Text field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Matching Outside Ad Type – Drop-down that contains the List of Outside Ad Sources entries.
- Array Name – This can be any unique name.
- Location – Given, that we will set the arrays up as arrays – that is, as separate lists of relevant components – we may want to set them up in different locations. This field helps to keep track of these arrays, in case we will store them in different locations, like, for example, in different files and/or folders.
- Ready – Indicates, whether or not the ad can be listed in the Characteristics of Inside Ad Arrays user interface, in the Inside Array Name drop-down.
- By Whom field should be stamped with that admin’s Username who clicked the “Enable Selected Records” or “Disable Selected Records” button. As usual, the Username should be a link to that visitor’s (admin’s) Profile page.

This field should be disabled (read only).

- Date – Date when the “Enable Selected Records” or “Disable Selected Records” button was clicked, in mm/dd/yy format.

This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Matching Outside Ad Type, Array Name, Ready field values.

We will probably make at least one Inside Ad Array for each List of Outside Ad Types value. We may also make Inside Ad Arrays that do not have any matching List of Outside Ad Types values.

MgtAdmin and higher can use the “Enable Selected Records,” “Disable the Selected Record” buttons and “Delete Selected Records” buttons.

- When the “Enable Selected Records” button is clicked, the selected record(s) Ready field should be checked off.

When the Ready field is checked off, the record should appear in the Inside Array Name drop-down that is part of the Characteristics of Inside Ad Arrays user interface.

- When the “Disable Selected Records” button is clicked, the selected record(s) Ready field should be cleared, that is, it should not be checked off.

When the Ready field is not checked off, the record should not appear in the Inside Array Name drop-down that is part of the Characteristics of Inside Ad Arrays user interface.

- When the “Delete Selected Records” button is clicked, the selected record(s) should be deleted.

Characteristics of Inside Ad Arrays

List the content of each inside ad array. Individual inside ads can be part of different arrays.

| ID | SR | Inside Array Name | Ad Category | Ad Dimensions | Image Name | Link To | Alt | Comments |
|----|--------------------------|-------------------|-------------|---------------|------------|---------|------------|------------|
| | <input type="checkbox"/> | Drop-down | Drop-down | Drop-down | Drop-down | URL | Text field | Text field |

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Inside Array Name, Ad Category, Ad Dimensions and Image Name are drop-downs that contain the content of their respective lists.
- Link To – URL that links inside ads to designated URL.

For the inside ads, Link To field value can be changed on the inside ad, inside ad array and on the ad placement page group level.

- Alt – Alt tag text.

Buttons and Functionality

MgtAdmin and higher can use the “Delete Selected Records” button to delete records.

Common Characteristics of Ad Groups

List of Ad Display General Locations

Each ad display general location should be listed once.

| ID | SR | Location Name | Ready | By Whom | Date | Comments |
|----|--------------------------|---------------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Username | Date field | Text field |

Enable the Selected Ad Placement Page Group (button)

Disable the Selected Ad Placement Page Group (button)

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Location Name – We will have 4 general locations for ads. Looking at them from left to right, their names could be, for example, Other Materials Left, Top Banner, Trailing Text, Other Materials Right.
- Ready – Indicates, whether or not the general location appears in the General Location drop-down that is part of the Characteristics of Ad Placement Page Groups user interface.
- By Whom field should be stamped with that admin’s Username who clicked the “Enable the Selected Ad Placement Page Group” or “Disable the Selected Ad Placement Page Group” button. As usual, the Username should be a link to that visitor’s (admin’s) Profile page.
This field should be disabled (read only).
- Date – Date when the “Enable the Selected Ad Placement Page Group” or “Disable the Selected Ad Placement Page Group” button was clicked, in mm/dd/yy format.
This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by ID.

On this user interface, only MainAdmin can use the “Enable the Selected Ad Placement Page Group” or “Disable the Selected Ad Placement Page Group” and “Delete Selected Records” buttons.

For Version 1, on the side pages we will have 4 general locations for the ads. Future versions may be set up differently. So, just in case, we should have the Enable/Disable/Delete functionality available here, too.

- When the “Enable the Selected Ad Placement Page Group” button is clicked, the selected record(s) Ready field should be checked off.
When the Ready field is checked off, the general location should appear in the General Location drop-down that is part of the Characteristics of Ad Placement Page Groups user interface.
- When the “Disable the Selected Ad Placement Page Group” button is clicked, the selected record(s) Ready field should be cleared, that is, it should not be checked off.
When the Ready field is not checked off, the general location should not appear in the General Location drop-down that is part of the Characteristics of Ad Placement Page Groups user interface.
- When the “Delete Selected Records” button is clicked, the selected record(s) should be deleted.

List of Ad Placement Page Groups

Each ad placement page group should be listed once.

| ID | SR | Page Group Name | Ready | By Whom | Date | Comments |
|----|--------------------------|-----------------|--------------------------|----------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Username | Date field | Text field |

Enable the Selected Ad Placement Page Group (button)

Disable the Selected Ad Placement Page Group (button)

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.

- Ready – Indicates, whether or not the ad placement page group can be used on the Site Map.
- By Whom field should be stamped with that admin's Username who clicked the "Enable the Selected Ad Placement Page Group" or "Disable the Selected Ad Placement Page Group" button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

This field should be disabled (read only).

- Date – Date when the "Enable the Selected Ad Placement Page Group" or "Disable the Selected Ad Placement Page Group" button was clicked, in mm/dd/yy format.

This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Page Group Name, Ready, By Whom, Date.

MgtAdmin and higher can use the "Enable the Selected Ad Placement Page Group" or "Disable the Selected Ad Placement Page Group" buttons.

Only MainAdmin can use the "Delete Selected Records" button to delete records.

- When the "Enable the Selected Ad Placement Page Group" button is clicked:
 - The selected record's ad placement page group should be usable through the Site Map.
 - By Whom field should be stamped with that admin's Username who clicked the button.
 - Date field should be stamped with the button clicking date.
- When the "Disable the Selected Ad Placement Page Group" button is clicked:
 - A message should appear:

On the Site Map, every record that has been assigned into the [selected ad placement page group's name should be inserted here] ad placement page group, will be assigned into the Default Ad Placement Group.

Click OK to continue, or Cancel to cancel this transaction.
 - If the user clicks OK,
 - On the Site Map, every record that has been assigned into the selected ad placement page group, should be assigned into the Default Ad Placement Group.
 - The selected record's ad placement page group should no longer be usable through the Site Map.
 - By Whom field should be stamped with that admin's Username who clicked the button.
 - Date field should be stamped with the button clicking date.
- When the "Delete Selected Records" button is clicked:
 - A message should appear:

On the Site Map, every record that has been assigned into the [selected ad placement page group's name should be inserted here] ad placement page group, will be assigned into the Default Ad Placement Group.

Click OK to continue, or Cancel to cancel this transaction.
 - If the user clicks OK,
 - On the Site Map, every record that has been assigned into the selected ad placement page group, should be assigned into the Default Ad Placement Group.
 - The selected record's ad placement page group should no longer be usable through the Site Map.
 - The record should be deleted.

During the development, we will enter the Default Ad Placement Group's record into this user interface. This functionality should be set up so, that the Default Ad Placement Group cannot be deleted, that is, that even the MainAdmin cannot delete the Default Ad Placement Group.

Characteristics of Ad Placement Page Groups

For individual records, the following fields separately do not have to contain unique entries, but in combination, these fields in every record should be unique: Page Group, General Location, Spot.

| ID | SR | Page Group | General Location | Spot | Spot Type | Spot Source | Link To | Comments |
|----|--------------------------|------------|------------------|---------|-----------|-------------|------------|------------|
| | <input type="checkbox"/> | Drop-down | Drop-down | Numeric | Drop-down | Drop-down | Text field | Text field |

Delete Selected Records (button)

- ID – AutoNumber.
- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Page Group and General Location are drop-downs that contain the content of their respective lists.
- Spot – Ad display spot. Numeric field with decimal places.

For example, if three entries are already listed, with values 1, 2 and 3, and the fourth entry is added with the value of 2.5, then it should go automatically between the entries that have the number 2 and 3 values. As a result, there are now four entries, listed in the order that is based on their Spot field values, 1, 2, 2.5 and 3.

Minimum of 3 decimal places are needed. We will specify the field type and the number of decimal places depending on the software-specific field criteria and storage requirements.

- Spot Type – Drop-down with two values: Outside, Inside. Default value should be Outside.
After a value is selected for the Spot Type field, the Spot Source field value should be cleared, so that this field has no value.
The idea is, that when a user changes the Spot Type field value, he or she must select a new value for the Spot Source field.
- Spot Source – List of either Outside Ad Types (if Spot Type value is “Outside”), or Inside Ad Arrays (if Spot Type value is “Inside”). Admin must choose one value from the applicable list.

The selection of the Spot Type – either Outside or Inside – should determine the Spot Source drop-down box values as follows:

- If the user selects Outside for the Spot Type value, Outside Ad Types should be listed in the Spot Source drop-down, so that the user can select one value from the list.
- If the user selects Inside for the Spot Type value, Inside Ad Arrays should be listed in the Spot Source drop-down, so that the user can select one value from the list.

Ads Management functionality should be set up so, that when an outside ad is not available (or an error occurs), an ad from a matching inside ad array is used instead.

- Link To – URL that links inside ads to designated URL.

Ads Management functionality should be set up so, that the Link To field value is only applied to the inside ads.

When the Spot Type field value is Outside, Link To field value should be ignored.

When a new inside ad is added to the List of Inside Ads, the Link To field value should be by default set to homepage.

For the inside ads, Link To field value can be changed on the inside ad, inside ad array and on the ad placement page group level.

Further, the inside ad linking functionality should be set up so, that in case of any errors the visitor who clicked on the inside ad is directed to the homepage.

Buttons and Functionality

Records should be sorted by Page Group, General Location, Spot.

MgtAdmin and higher can use the Delete Selected Records button.

Homepage Content Management

Column 1

Column [drop-down] | Location [drop-down]

| ID | SR | Caption | Display | By Whom | Date |
|----|--------------------------|------------|--------------------------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Text field | Date field |
| | | | | | |

Column [drop-down] | Location [drop-down]

| ID | SR | Caption | Display | By Whom | Date |
|----|--------------------------|------------|--------------------------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Text field | Date field |
| | | | | | |

Column [drop-down] | Location [drop-down]

| ID | SR | Caption | Display | By Whom | Date |
|----|--------------------------|------------|--------------------------|------------|------------|
| | <input type="checkbox"/> | Text field | <input type="checkbox"/> | Text field | Date field |
| | | | | | |

Enable Selected Records (button)

Disable Selected Records (button)

Preview (button)

Save (button)

Clear Selected Records (button)

- Each Column drop-downs should contain values 1, 2, 3.
- Each Location drop-downs should contain values 1, 2, 3.
- SR – Stands for Select Record. The functionality of record-specific buttons applies to these records that are selected. This field should be enabled.
- Caption – Homepage text area caption. For example, in the homepage mockup “Current Focus” is one of the captions.
- Display – Yes, that is, checked off value indicates that the record is displayed in Preview view and/or on the website.

This field should be disabled by default. The field’s value can be changed through using the “Enable the Selected Records” button and “Disable the Selected Records” button.

- By Whom field should be stamped with that admin’s Username who clicked the “Enable Selected Records” or “Disable Selected Records” button. As usual, the Username should be a link to that visitor’s (admin’s) Profile page.

This field should be disabled (read only).

- Date – Date when the “Enable Selected Records” or “Disable Selected Records” button was clicked, in mm/dd/yy format.

This field should be disabled (read only).

- In the next row, the text area is for the homepage text area content. The text that is intended for the homepage text area should fit into this CMS user interface text area without scrolling. So, we probably want to make these CMS text areas 5 rows high or higher, if they are narrow.

Layout and Functionality Overview

Homepage contains content in 3 columns. Each column can contain up to 3 text areas. Each text area has a caption with either red, blue or green background.

Please see the homepage mockup (HTML page) for additional information.

Above mockup (in this Word file) represents 3 text areas for Column 1 – that is, only one column out of three. In the actual content management system, this subsection’s user interface should contain total of 9 text areas, 3 per column, so, total of $3 \times 3 = 9$.

In some instances we need to try different combinations of text areas. Therefore, *we want to build the CMS so, that all 9 areas are displayed for content management purposes (even when they are empty), but the CMS user can re-order the locations of the individual areas that have been filled in by selecting values for the Column and Location drop-down boxes.*

For each Column and Location drop-down the user can select values from 1 to 3.

The Preview and Save buttons trigger Location Verification Functionality, which ensures that each Column and Location combination is unique

Buttons and Functionality

Records should be sorted by Location (drop-down) field values.

MgtAdmin and higher can use the “Enable Selected Records,” “Disable the Selected Record,” “Preview,” “Save,” and “Clear Selected Records” buttons.

- When the “Enable Selected Records” button is clicked, the Display Verification Functionality should be activated as is explained below.
 - If the verification is passed, the selected record(s) Display field should be checked off.

When the Display field is checked off, the record should appear on the homepage when the Save button is clicked.

- When the “Disable Selected Records” button is clicked, the selected record(s) Display field should be cleared, that is, it should not be checked off.

When the Display field is not checked off, the record should not appear on the homepage when the Save buttons is clicked.

- When the “Preview” button is clicked, the Location Verification Functionality should be activated as is explained below.
 - If the verification is passed, the homepage should be shown in the Preview view as is explained below.
- When the “Save” button is clicked, the Location Verification Functionality should be activated as is explained below.
 - If the verification is passed:
 - the homepage content should be updated as is explained below,
 - for verification purposes, in a new browser instance, homepage with the updated content should be displayed to the user.
- When the “Clear Selected Records” button is clicked, for the selected record(s):
 - Caption (text field) and text area should be cleared of any text.
 - Display field should be should be cleared, that is, it should not be checked off. Accordingly, the record should not appear on the homepage when the Preview and Save buttons are clicked.
 - The By Whom and Date fields should be stamped as is explained above.

Display Verification Functionality

The Display Verification Functionality should help to avoid simple errors. We can keep this functionality itself simple, too.

We can set this functionality up so that for the selected record(s) we make sure that the Caption field is not empty, and that the text area is not empty.

If for any selected record either the Caption field or the text area is empty, the Display Verification Functionality fails and should display a message:

Please make sure that the selected record(s) Caption field and text area have been filled in as needed.

Location Verification Functionality

Location Verification Functionality helps to ensure, that we have at least one text area per column and that we have unique Location values for each column. Following conditions should be tested:

Condition

In each column we want to start the text areas with Location 1. This means, that each column must contain Location 1 selection.

It seems to me, that testing for this will also help to ensure, that each column contains at least one filled in Caption and text area record.

Condition

Up to 3 records/text areas per column. That is, we can only have up to 3 text areas in each of the columns.

Condition

In each of the columns we can have only one value 1, one value 2 and one value 3.

Further, the Location values must be consecutive. That is, we cannot have Location 1 and then Location 3 displayed on the homepage, so that there is an empty space in between. If the user accidentally selects for any column Location 1 and Location 3, but does not select Location 2, the verification fails.

Above we already tested for Location 1 being filled in, and for not having the number of locations greater than 3. After those tests, we can test for the following conditions for all 3 columns:

- If the number of filled in locations is greater than 1, then we must have Location 2 selected.
- If the number of filled in locations is greater than 2, then we must have Location 3 selected.

Conclusion

If any of the above conditions are not met, the Location Verification Functionality fails and the application should display the following message:

Please make sure that you have selected

-- at least one location per column

-- up to 3 locations per column

-- and that the locations are numbered consecutively.

After making the needed corrections please press the same functionality button again that triggered this message.

Automatic Assignment of Caption (Header) Background Color

Each of the currently used homepage text areas should have header background color assigned to it automatically in accordance with the text area location and the values listed in table below

tblHeaderBackgroundColor

| ID | Column | Placement | Background Color |
|----|--------|-----------|------------------|
| 1 | 1 | 1 | Red |
| 2 | 1 | 2 | Blue |
| 3 | 1 | 3 | Green |
| 4 | 2 | 1 | Green |
| 5 | 2 | 2 | Red |
| 6 | 2 | 3 | Blue |
| 7 | 3 | 1 | Blue |
| 8 | 3 | 2 | Red |
| 9 | 3 | 3 | Green |

Preview vs. Save Functionality

We need functionality for previewing homepage through the Homepage Content Management user interface. Only the fields that have the Display checked off should be displayed.

When the Preview button is clicked and the verification passes, the content that is currently designated through the CMS should be shown. Only after the Save button is clicked and the verification passes, should the relevant content be saved, so that it is shown on the actual homepage.

So, Preview functionality requires some extra tables and copying and pasting records from the preview table to the production environment table.

Homepage Text Area Content Formatting

We need formatting functionality for the homepage text areas that is in accordance with the mockups. That is, CMS users need to be able to apply the formatting to the homepage that is shown on the mockups.

Similarly, we need the ability to publish website sections and subsections that are formatted the way the mockups are formatted.

List of Sections Management

We need an user interface for designating sections. This user interface should be linked to Site Map and Subsection Content Management functionalities.

MgtAdmin and higher should be able to use the List of Sections Management functionality.

We can keep this user interface very simple – just a list with the sections names. As always, the IDs (primary keys) should be shown, too. The values in that column can simplify some technical communication processes when people who work on problem solving are not located in the same room.

Section Opening Page Content Management

Subsection Extractions

Section opening page is the first page of a section, where a visitor lands, when he or she clicks on the section's name in either Website Sections area, or on the Site Map.

Mockup page 4 illustrates a section opening page.

As is shown on mockup page 4, a section opening page should contain excerpts of the subsections within that section, that is, abbreviated versions of the section's content, with links to the individual subsections of the section.

Ideally, we set this up using automatic excerpts or teasers – perhaps the WordPress More tag.

Here, just like in most of the other parts of the specs files, I am not suggesting any specific solutions. I am simply describing how the end results should function.

The section pages should be set up so, that from each relevant post the header and the first x number of words or letters of text are copied automatically into the section opening page.

Currently, on the mockup, x = 500, that is, 500 letters or text are copied into each excerpt.

x includes only the letters of text. That is, it does not include bullets, or any formatting characters. To put it differently, the CMS should be set up so, that the character count is calculated based on the characters that are visible to the website visitors. That is, formatting features (bold, italics) and anchors should not be counted towards the character count.

However, instead of using a specific number of characters, we can use a specific number of words. We could use something like WordPress automatic excerpts, however, instead of 55 words, I would like the amount of text to be 80 words. ***I consider this 80 vs. 55 difference to be pretty important.***

Further, ideally we will set this functionality up so, that OrgAdmin or higher can override the default selection and replace any extraction text. In each case when the text is not replaced, default selection is used.

Exclusion Option

We should have functionality that allows CMS user to exclude selected posts excerpts from being displayed on the section opening page.

Formatting of the Extracted Components

The automatically extracted text should be formatted just like the same text is formatted in the relevant post.

For replacing and inserting excerpts manually we need the same formatting functionality that is used for formatting of the posts text (as is shown on the mockups).

Correct Order of the Extracted Components

On the section opening pages the extracted components should be listed in the same order as the subsections are listed in the Selected Section's Content area and on the Site Map.

To put it differently, these components should be listed in the same order as the subsections are listed in the Site Map Subsections Management user interface.

Therefore, the section opening page components listing order functionality should probably be linked to the Site Map Management functionality.

Subsection (Blogging and Non-Blogging Page) Content Management

As is stated in the Site Map Management subsection

Site Map Management user interfaces are for posting previously finalized sections and subsections on the public website and its Site Map. Section and Subsection Content Management functionality should be used for finalizing individual sections and subsections prior to posting them on the website through the Site Map Management functionality.

This applies to sections and both blogging pages (posts) and non-blogging pages.

Unless we agree otherwise, for sections (WordPress Categories) we only need to specify the section's name in order to include the section on the Site Map.

For blogging and non-blogging pages we also need to specify the page content.

Administrator Activities section, Workload Handling Sequence: CMS User's Side subsection, states that we want to set up the CMS login so, that after the login the CMS user sees right away the work that needs to be done.

We can name this first user interface the "Workload Review and Management" user interface.

On the Workload Review and Management user interface should be a button that reads

Add a New Page

Using this button, OrgAdmin and higher should be able to add new blogging and non-blogging pages.

Unpublished Page Management

| | | | |
|---------------------|---|--|---|
| URL | | | |
| Title phrase | | | |
| Description | | | |
| Keywords | | | |
| Robots | Noindex <input type="checkbox"/> | Nofollow <input type="checkbox"/> | Noarchive <input type="checkbox"/> |

| ID | H1 Header | Section | B? | Start Date | By Whom | C? | Compl Date |
|-----------|------------------|----------------|--------------------------|-------------------|----------------|--------------------------|-------------------|
| | Text field | Drop-down | <input type="checkbox"/> | Date field | | <input type="checkbox"/> | Date field |

| | | | | | | | |
|--|--|--|--|--|--|--|--|
| | | | | | | | |
|--|--|--|--|--|--|--|--|

Preview (button)

Delete (button)

- URL – We do not want to use WordPress default permalink structure, that simply has a numeric entry for the post URL name. Similarly, I don't think that we want to use a date and name based URL structure. Instead,

we want to use a search engine friendly structure that also reflects website structure. We may use the WordPress Customizing Permalink Structure option “Custom, specify below.” and specify it as `/%category%//%postname%/`

However, ideally we will set the content management system up so, that we can specify URLs that are different than the post’s heading is. This should give even better SEO results.

I am open to suggestions to how to set this functionality up.

- Title phrase – We probably want to use the page heading as part of the <title> tag the following way:

`<title>Page Heading | CreativityModel.com | Short keyword-rich phrase</title>`

We probably want to include the H1 heading in the above automatically, followed by the website name, separated by pipes. After that could be a short keyword rich phrase. For each page the CMS user should be able to specify this phrase.

I am open to suggestions to how to set this functionality up.

- Description – Description meta tag’s content.
- Keywords – Keywords meta tag’s content.
- Robots – We don’t have to specify the “robots” tag that appears by default, because it’s `<meta name="robots" content="index, follow"/>`

However, we should be able to specify the noindex, nofollow and noarchive options for selected pages.

Please note, that some sources suggest that the noarchive option should appear in a separate “robots” tag. So, we have to specify how we will set this up.

- URL –
- H1 Header is the blogging post’s or non-blogging page’s intended header/caption. This is a text field. The user should be able to change this field’s content.
- Section drop-down contains the listed sections names.
- B? – Stands for Blogging. If checked off, the page is intended to be a blogging page.
This field should be enabled, so that the user can change its value.
- Start Date – This field should be stamped in mm/dd/yy format when the “Add a New Page” button is clicked on the Workload Review and Management user interface.
This field should be disabled (read only).
- By Whom field should be stamped with that admin’s Username who clicked the “Add a New Page” button. As usual, the Username should be a link to that visitor’s (admin’s) Profile page.
This field should be disabled (read only).
- C? – Stands for Complete.
When this field is checked off, CMS users should be able to add the page to the Site Map.
We should also have a functionality for clearing this field, and that should result in the page being removed from the Site Map.
This field should be enabled, so that the user can change its value.
- Compl Date – This field should be stamped in mm/dd/yy format when the “C?” field is checked. Similarly, this field should be cleared, when the “C?” field is cleared.
This field should be disabled (read only).

Formatting Functionality

Each page should contain formatting features that are in accordance with what is stated in Workload Structure and Handling section, Website Parts Formatting Features subsection, and with the features displayed on the mockup HTML pages.

Buttons and Functionality

In CMS all new pages should be in the Edit mode. Clicking the Preview button should result in the preview that shows the page as it will look on the website.

Delete (button) deletes the page. We should set this up so that either the OrgAdmin whose Username is in the By Whom field, or MgtAdmin or higher can use the Delete button to delete pages.

New Content Management Administration

The tasks that are listed on this interface should be related to the information that appears on the Workload Review and Management user interface as well.

Unhandled Workload Review

Total items for all Item Types

Item Type: Total items

This data should be presented for all item (task) types. However, this data should be presented only for these Item Types that have more than 0 (zero) Total items in the unhandled items category.

Total items for all Item Types should be presented even if the grand total is 0 (zero).

New Content Management

Sort By (drop-down)

Select Record (SR)

Who Assigned (Who)

Assigned To Whom (ToWhom)

Item Type (What)

Urgent (U!)

Acknowledged (Ak)

Completed (CM)

Closed (CL)

Apply Sorting (button)

Default Sorting (button)

Filter For

Who Assigned (drop-down of admins)

Assigned To Whom (drop-down of admins)

Item Type (drop-down of item types)

Urgent Yes

Urgent No

Acknowledged Yes

Acknowledged No

Completed Yes

Completed No

Closed Yes

Closed No

Apply Filter (button)

Remove Filter (button)

Select All (button)

Assign What [Item Type drop-down] To Whom [admin drop-down]

Mark Selected as Urgent (button)

Mark Selected as Not Urgent (button)

Mark Selected as Acknowledged (button)

Mark Selected as Completed (button)

Mark Selected as Closed (button)

Mark Selected as Not Closed (button)

Delete Selected Records (button)

| ID | S R | ToWhom | What | ID | When | ByWhom | U! | Ak | AkDate | CCDate | CM | CMDate | CL | Notes |
|----|--------------------------|--------|------|----|------|--------|--------------------------|--------------------------|--------|--------|--------------------------|--------|--------------------------|-----------------------|
| | <input type="checkbox"/> | | | | | | <input type="checkbox"/> | <input type="checkbox"/> | | | <input type="checkbox"/> | | <input type="checkbox"/> | Click |

All of the fields, except the SR, Notes and CCDate fields should be disabled (read only).

- ID – Primary Key field (should be visible)
- SR – Stands for Select Record; record-specific buttons functionality applies to the selected records.
This field should be enabled.
- ToWhom – Username of the admin, to whom the task is assigned.
- What – Task's Item Type.
- ID – Task Item's ID.
- When – Record creating date.
- ByWhom – Username of the admin who created the record.
- U! – Stands for Urgent. Yes/No field.
- Ak – Stands for Acknowledged. Yes/No field.
- AkDate – Stands for Acknowledgement Date. Date field, mm/dd/yy format.
- CCDate – Stands for Committed Completion Date.
This field should accept manually entered data in the mm/dd/yy format.
- CM – Stands for Completed, Yes/No column, No by default.

CM field is important, because **unchecked entries identify the unhandled workflow**.

- CMLDate – Stands for Completion Date. Date field, mm/dd/yy format.
- CL – Stands for Closed. Indicates, whether or not the record is closed. The MgtAdmin or higher admin who reviews the records should close them.
- Notes – a clickable link that opens, ideally, a popup that allows to make notes. 5000 character limit.

One Record Per Item

On this user interface, we have one record per item. There is no copying of the record and inserting it in the data stream.

Buttons, Sorting and Filtering

Buttons should apply to these fields, that have been selected using the SR field.

All buttons should work with both filtered and unfiltered data.

Each of the button related actions should be preceded with a message and question that allows to proceed or cancel the action – something like “You are about to [action’s description]. Do you want to proceed?” Yes No options.

Apply Sorting applies selected sorting, Default Sorting applies default sorting. Essentially the same applies to the filtering buttons.

Select All button checks off the SR column for all the entries displayed on the user interface. Should work together with filters.

Default sorting is: CM (No), ToWhom, What, When.

The first of those, CM, stands for Completed. That is, primarily we want to sort the data so, that the records that have not been reviewed yet appear on the top of the list.

Who, ToWhom, What fields should be sorted alphabetically.

Filtering can be set up so that one filter can be applied at the time.

New Record Creating Button

Assign What [Item Type drop-down] to Whom [admin drop-down] creates new records.

- Add What is a button.
- [Item Type drop-down] is a drop down that contains a list of items.
- To Whom is a label
- [admin drop-down] is a drop-down that contains a list of admins.

The drop-down that contains a list of items should contain the following entries:

- Post
- Homepage
- Site section
- Transcript
- Visitor subm
- Inquiry
- Profile
- Ad
- Sponsorship

- Product eval
- Promotion
- Site Map
- Navigation
- Other

We should be able to modify this drop-down's content.

Before clicking the Add What button, the CMS user should make a selection from both drop-downs. If no selection has been made from one or both of the drop-downs, the application should prompt the user for the selections.

When the Add What button is clicked, a confirmation message should be displayed (Yes / No options)

If Yes, then a new record should be created **on the top of the list of records**. On the new record,

- ToWhom field should be stamped with that admin's Username who was selected from the [admin drop-down].
- What field should be stamped with the items drop-down selection.
- When field should be stamped with date mm/dd/yy format (EST – US Eastern Standard Time).
- ByWhom field should be stamped with that admin's Username, who clicked the button.

Existing Record Processing Buttons

Other than Mark Selected as Closed button, and Mark Selected as Not Closed button, all existing record processing buttons should apply only to the records that have CM (Completed) field value of False (No), that is, the CM field has not yet been checked off.

Once the CM (Completed) field is marked True (Yes), that record cannot be modified further, other than marked CL (Closed) True or False. That is, for the records that have the CM (Completed) field checked off, only the CL (Closed) field value can be changed.

Mark Selected as Urgent (button)

- Checks off the Urgent (U!) field, that is, marks the Urgent (U!) field True.

MgtAdmin and higher can use this button.

Mark Selected as Not Urgent (button)

- Clears the checkmark from the Urgent (U!) field, that is, marks the Urgent (U!) field False.

MgtAdmin and higher can use this button.

Mark Selected as Acknowledged (button)

- Checks off the Acknowledged (Ak) field, that is, marks the Acknowledged (Ak) field True.
- Stamps AkDate field with date mm/dd/yy format (EST – US Eastern Standard Time).

All admin levels should be able to use this button.

Mark Selected as Completed (button)

- Checks off the Completed (CM) field, that is, marks the Completed (CM) field True.
- CMDate field with date mm/dd/yy format (EST – US Eastern Standard Time).
- ToWhom field should be stamped with that admin's Username, who clicked the button.

Mark Selected as Closed (button)

- Checks off the Closed (CL) field, that is, marks the Closed (CL) field True.

MgtAdmin and higher can use this button.

Mark Selected as Not Closed (button)

- Clears the checkmark from the Closed (CL) field, that is, marks the Closed (CL) field False.

MgtAdmin and higher can use this button.

Deletions

When the Delete Selected Records button is clicked, all the records that are selected using the SR field should be deleted. A confirmation message should precede deletions.

MgtAdmin and higher can delete records.

Navigation

We probably should put up to 100 records per page. The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.

Site Map Management

Site Map Management

Site Map Management user interfaces are for posting previously finalized sections and subsections on the public website and its Site Map. Section and Subsection Content Management functionality should be used for finalizing individual sections and subsections prior to posting them on the website through the Site Map Management functionality.

Site Map Sections Management

Each section should be listed once.

| ID | SR | Caption | SectionID | Spot | Display | By Whom | Date |
|----|--------------------------|-----------|-----------|---------|--------------------------|----------|------------|
| | <input type="checkbox"/> | Drop-down | Numeric | Numeric | <input type="checkbox"/> | Username | Date field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete Selected Records (button)

- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- Caption – Section’s caption, that is, the section’s name, that is displayed on the website, for example, Concepts in a Nutshell.
This field should be enabled.
The drop-down should contain captions of the sections that were listed through the Section and Subsection Content Management functionality.
- SectionID – The SectionID of the section that was selected for the Caption field.
This field should be disabled. The data should be pulled from the Section and Subsection Content Management functionality table structure.
- Spot – Section’s spot, that is, the displaying order on the website. Numeric field with decimal places.
For example, if three entries are already listed, with values 1, 2 and 3, and the fourth entry is added with the value of 2.5, then it should go automatically between the entries that have the number 2 and 3 values. As a result, there are now four entries, listed in the order that is based on their Spot field values, 1, 2, 2.5 and 3.
Minimum of 2 decimal places are needed. We will specify the field type and the number of decimal places depending on the software-specific field criteria and storage requirements.
- Display – Yes, that is, checked off value indicates that the record is displayed on the website.
This field should be disabled. The field’s value can be changed through using the “Enable Selected Records” button and “Disable Selected Records” button.
- By Whom field should be stamped with that admin’s Username who clicked the “Enable Selected Records” or “Disable Selected Records” button. As usual, the Username should be a link to that visitor’s (admin’s) Profile page.
This field should be disabled (read only).
- Date – Date when the “Enable Selected Records” or “Disable Selected Records” button was clicked, in mm/dd/yy format.

This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Spot field values.

Only MainAdmin can use the “Enable Selected Records,” “Disable the Selected Record” buttons and “Delete Selected Records” buttons.

- When the “Enable Selected Records” button is clicked, the selected record(s) Display field should be checked off.

When the Display field is checked off, the record should appear in the Section drop-down that is part of the Site Map Subsections Management user interface, and on the website, in the Website Sections area.

- When the “Disable Selected Records” button is clicked, the selected record(s) Display field should be cleared, that is, it should not be checked off.

When the Display field is not checked off, the record should not appear in the Section drop-down that is part of the Site Map Subsections Management user interface, and on the website, in the Website Sections area.

- When the “Delete Selected Records” button is clicked, the selected record(s) should be deleted.

Site Map Subsections Management

Each subsection should be listed once.

| Section Caption | | | Subsection Caption | | | Subsection Description | |
|-------------------------|--------------------------|---------------|-------------------------|------------|--------------------------|------------------------|------------|
| Drop-down (2 rows high) | | | Drop-down (2 rows high) | | | Text box (2 rows high) | |
| ID | SR | Sub-sectionID | Spot | Orig. Date | Display | By Whom | Date |
| | <input type="checkbox"/> | Numeric | Numeric | Date field | <input type="checkbox"/> | Username | Date field |

| Section Caption | | | Subsection Caption | | | Subsection Description | |
|-------------------------|--------------------------|---------------|-------------------------|------------|--------------------------|------------------------|------------|
| Drop-down (2 rows high) | | | Drop-down (2 rows high) | | | Text box (2 rows high) | |
| ID | SR | Sub-sectionID | Spot | Orig. Date | Display | By Whom | Date |
| | <input type="checkbox"/> | Numeric | Numeric | Date field | <input type="checkbox"/> | Username | Date field |

Enable Selected Records (button)

Disable Selected Records (button)

Delete Selected Records (button)

Above mockup displays two records fields. So, there are four rows per record. In the first two rows there are Caption and Description headers and their fields. In the third and fourth row are ID, SR, Section, SubsectionID, Spot, Orig Date, Display, By Whom and Date headers and their fields.

Please note, that through this functionality any subsection can be freely associated with any section.

Ideally, we will set this functionality up so, that a subsection can be listed only once, that is, that the application's functionality helps to detect and avoid human errors in this area.

- Section Caption – Section's caption, that is, the section's name, that is displayed on the website, for example, "Concepts in a Nutshell."
This field should be enabled.
The drop-down should contain captions of the sections that were listed through the Section and Subsection Content Management functionality.
- Subsection Caption – Subsection's caption, that is, the subsection's name, that is displayed on the website, for example, "Why Does This Matter To You?"
This field should be enabled.
The drop-down should contain captions of the subsections that were listed through the Section and Subsection Content Management functionality.
- Subsection Description – Subsection description that appears on the Site Map.
This field should be disabled. The data should be pulled from the Section and Subsection Content Management functionality table structure.
- SR – Stands for Select Record. The user interface specific buttons functionality applies to these records that are selected. This field should be enabled.
- SubsectionID – The SubsectionID of the subsection that was selected for the Subsection Caption field.
This field should be disabled. The data should be pulled from the Section and Subsection Content Management functionality table structure.
- Spot – Subsection's spot within a section, that is, the displaying order on the website within a section. Numeric field with decimal places.
For example, if three entries are already listed, with values 1, 2 and 3, and the fourth entry is added with the value of 2.5, then it should go automatically between the entries that have the number 2 and 3 values. As a result, there are now four entries, listed in the order that is based on their Spot field values, 1, 2, 2.5 and 3.
Minimum of 3 decimal places are needed. We will specify the field type and the number of decimal places depending on the software-specific field criteria and storage requirements.
- Orig. Date – Original posting/publishing date.
- Display – Yes, that is, checked off value indicates that the record is displayed on the website.
This field should be disabled. The field's value can be changed through using the "Enable Selected Records" button and "Disable Selected Records" button.
- By Whom field should be stamped with that admin's Username who clicked the "Enable Selected Records" or "Disable Selected Records" button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
This field should be disabled (read only).
- Date – Date when the "Enable Selected Records" or "Disable Selected Records" button was clicked, in mm/dd/yy format.
This field should be disabled (read only).

Buttons and Functionality

Records should be sorted by Spot field values.

MgtAdmin and higher can use the "Enable Selected Records" and "Disable the Selected Record" buttons.

Only MainAdmin can use the "Delete Selected Records" buttons.

- When the “Enable Selected Records” button is clicked, the selected record(s) Display field should be checked off.
 - When the Display field is checked off, the record should appear on the website, in the Selected Section's Content area under the applicable section, and on the Site Map.
 - Every time when the “Enable Selected Records” button is clicked on this user interface, the post content and, in the case of a post, blogging questions, comments and replies content should be refreshed on the website, using the data that is pulled from the Section and Subsection Content Management functionality table structure.
- When the “Disable Selected Records” button is clicked, the selected record(s) Display field should be cleared, that is, it should not be checked off.
 - When the Display field is not checked off, the record should not appear on the website, in the Selected Section's Content area under the applicable section, and on the Site Map.
- When the “Delete Selected Records” button is clicked, a message should appear:

The selected subsections will be deleted from the content management system.
Click OK to continue, or Cancel to cancel this transaction.

 - If the user clicks OK, the record should be deleted.

Current Workload Handling

Unhandled Questions, Comments and Replies

Below are mockup descriptions of two interfaces: Unhandled Workload Review and Unhandled Workload Management. They are presented here separately. In actuality, I would like them to be together. The Unhandled Workload Review part, which is essentially a partial copy of another user interface, could be presented horizontally, so that it takes less screen space.

Unhandled Workload Review provides data about the unhandled workflow. The same data should be provided through the Unhandled Workload Review user interface that is described in the Administrators Activities section. So, we don't need any extra functionality here.

The same applies to other user interfaces – in their respective portions of the Unhandled Workload Review user interface, they repeat the same data that is in the Unhandled Workload Review user interface that the admins should see, when they log in.

This subsection's Unhandled Workload Management user interface is for handling these questions, comments and replies, for which the CMS workload related processing has not been completed.

All admins should be able to work with unhandled questions, comments and replies through the CMS as indicated.

In addition, as is described in the Previous Workload Review and Handling subsection, MgtAdmin and higher should be able to

- review and work with already handled items.
- work with posts, questions, comments and replies through the Page Edit functionality, which is described separately in the Previous Workload Review and Handling subsection.

Overall Workflow

Different admins may work with different types of items in different ways. However, generally, questions, comments and replies are intended to be processed in the following order:

1. Default processing – Involves primarily computerized division of items in accordance with the List Type and Item Type. This involves also computerized selection of items for deletion.
2. Processing – Involves primarily review of items, selection of items for deletion, and writing of replies and responses.
3. Posting – Involves primarily posting of items on the website and, as applicable, posting of responses to visitors profiles or sending the responses to the visitors via email.

All steps may require sorting and filtering functionality usage.

Unhandled Workload Review

Questions, comments and replies total items

Questions

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Comments

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Replies

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

This data should be presented for all the Item Types. However, this data should be presented only for these Item Types that have more than 0 (zero) Total items in the unhandled items category. To put it differently, we do not need to list under the Unhandled Workload Review user interface different Item Types that do not have any unhandled workload items. The same principles applies to the Unhandled Workload Management user interface as well.

Questions, comments and replies total items should be presented even if the grand total is 0 (zero).

Unhandled Workload Management

Default Processing (button)

Sort By (drop-down)

Default sorting

PostID, ParentItemID, EntryID

Item Type Filter (drop-down)

Questions only

Comments only

Replies only

Replies with Parent Items

List Type Filter (drop-down)

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Primary Item Data Filter (drop-down)

Alert! Yes

Alert! No

Default processing Yes

Default processing No

Processed Yes

Processed No

Post Yes

Post No

Response posted Yes

Response posted No

Secondary Item Data Filters

EntryID (drop-down)

PostID (drop-down)

ParentItemID (drop-down)

VisitorID (drop-down)

Username (drop-down)

Admin who processed (drop-down)

Admin who posted (drop-down)

Primary Item Processing Filter (drop-down)

Good, no reply/resp

Good, reply needed

Good, rsp Gr [1-10]

Good, both reply/resp

Delete, no response

Delete, rsp Gr [1-10]

Secondary Item Processing Filter

ATo Admin (drop-down)

Apply Filter (button)

Remove Filter (button)

Continues on the next page

Item Type List Type

| | | |
|---|--|--------------------------------------|
| <p>Submitted question, comment or reply text</p> | <p>EntryID mm/dd/yy <u>PostID</u> ParentItemID <u>VisitorID</u> <u>Username</u> <input checked="" type="checkbox"/> Default processing <input checked="" type="checkbox"/> Alert! <input type="checkbox"/> Proc mm/dd/yy Admin who processed <input type="checkbox"/> Post mm/dd/yy Admin who posted <input type="checkbox"/> Response posted <input type="checkbox"/> Closed mm/dd/yy Admin who closed</p> | <p>Response text (if applicable)</p> |
| <p>Next submitted question, comment or reply text OR administrator's reply text</p> | <p>EntryID mm/dd/yy <u>PostID</u> ParentItemID <u>VisitorID</u> <u>Username</u> <input checked="" type="checkbox"/> Default processing <input checked="" type="checkbox"/> Alert! <input type="checkbox"/> Proc mm/dd/yy Admin who processed <input type="checkbox"/> Post mm/dd/yy Admin who posted <input type="checkbox"/> Response posted <input type="checkbox"/> Closed mm/dd/yy Admin who closed</p> | <p>Response text (if applicable)</p> |
| | <ul style="list-style-type: none"> • Good, no reply/resp • Good, reply needed • Good, rsp Gr [1-10] • Good, both reply/resp • Delete, no response • Delete, rsp Gr [1-10] • ATo [Admin drop-down] | |
| | <ul style="list-style-type: none"> • Good, no reply/resp • Good, reply needed • Good, rsp Gr [1-10] | |

| | | |
|--|--|--|
| | <ul style="list-style-type: none"> • Good, both reply/resp • Delete, no response • Delete, rsp Gr [1-10] • ATo [Admin drop-down] | |
|--|--|--|

Top ^ (link that takes to the top of the page)

Response Options (link)

Apply Response [] to Group []

Apply Spelling Check (button)

Assign Selected To [Admin drop-down]

Process (button)

Post (button)

Close All (button)

Sorting and Headers

Item Types and List Types

Above mockup displays user interface parts for two unhandled items.

For the sake of clarity, I will add the following explanatory text here:

Item Types (that are relevant to this user interface)

Questions

Comments

Replies

List Types

No Problem Detected

Quarantined Offensive

Deleted Offensive

We have more item types – for example, inquiries, and others, that are listed under Task Categories. However, these other item types are not relevant to this user interface.

By default, all items are on the No Problem Detected list. Only these items, for which a possible problem is detected, belong on either Quarantined Offensive or Deleted Offensive list. At this point we are only checking for potentially offensive language, so, matches to Potentially Offensive Terms List or Offensive Terms List can land items on one of these two lists. In the future versions of this website and updates to this functionality, we may add other ways of detecting possible problem entries as well, that land items on either Quarantined Offensive or Deleted Offensive list.

Sorting Options and Header Display

We have two sorting options:

- Default sorting

- PostID, ParentItemID, EntryID

Default Sorting

By default,

- all the data should be displayed
- all the items should be sorted (1) by the Item Type, (2) then by the List Type, (3) then by PostID, (4) then by the ParentItemID, and (5) then by the EntryID.

In these cases, the headers should contain the relevant Item Type and List Type information.

PostID, ParentItemID, EntryID Sorting Option

Whenever filtering is being applied, so that only selected data is being displayed, the second sorting option should be applied as well:

PostID, ParentItemID, EntryID

In these cases, the headers could state for both the Item Type and List Type N/A, that is, repeat the N/A for both of them.

Question: Please let me know, if you find this solution acceptable, or recommend something else instead.

Headers

When default sorting is applied, each Item Type and List Type subgroup should start with its own header. That is, each change in Item Type or List Type means, that a new header is needed for the next subgroup.

So, we have total of 9 Item Type and List Type subgroups:

- Questions No Problem Detected
- Questions Quarantined Offensive
- Questions Deleted Offensive
- Comments No Problem Detected
- Comments Quarantined Offensive
- Comments Deleted Offensive
- Replies No Problem Detected
- Replies Quarantined Offensive
- Replies Deleted Offensive

We can set this up so, that if a subgroup has no entries, we simply display the header row and then the next header row. Please let me know, if you have questions about this.

About the IDs

PostID should be the same ID, that is displayed on the website where the post is. Please see the mockups for additional relevant information.

We will use IDs for both development-related communication purposes, and later most likely also for website administration-related purposes. Further, in some instances such communication may involve website visitors as well.

On the website mockup I listed PostID and EntryID with the (mockup) Primary Key value. That is, I listed the primary key together with the field name label, as one word.

I think that doing so on the website adds clarity. If we would have only numbers there, without the labels, that would be too confusing to the visitors.

However, just in case I will add here, that in our database table system we will want to use all numeric AutoNumber type of Primary Keys (automatically generated whole numbers, starting with 1 and incremented by 1 per record). That is, the field names will be field names, as usual, and Primary Key field entries will be all numeric.

Item Types and Their Primary Key Field Names

I am also addressing item types and their Primary Key field names here, because this topic is closely related to the above ID topic.

As is defined above, an item is an “Individual part of a task category that needs to be processed through the CMS.” *Accordingly, item types can be derived from the Task Categories subsection.*

We probably want to list the following as Item Types:

| Item Type | Primary Key field name that we could use in the table structure |
|--|---|
| Ad | AdID – ads are on the homepage and on all or most of the sidepages. |
| Question | EntryID – we probably want to store questions, comments and replies together, in the same table. |
| Comment | EntryID |
| Reply | EntryID |
| Inquiry | InquiryID |
| Flagged as Offensive items | InquiryID – given, that we will keep these items in the same table with inquiries, but make them available (through using Inquiry Type indicators) through a different user interface. It seems to me, that we can use this approach. Otherwise, we will need a different Primary Key, which in that case could be something like FOInquiryID or something like that. |
| Questionnaire | QuestionnaireID |
| Profile | VisitorID |
| Live Chat transcript | TranscriptID |
| Abuse Control System Items | ACSItemID |
| Non-Blogging Pages: Sponsorships, Product Evaluations and Promotions | PromoItemID – we plan to have one text (with one or more headers) per page. So, we may need only one ID. |
| Non-Blogging Pages: Section Pages Items | SectPageID, SectPageItemID – there will be one section page entry per subsection. That is, every section page will contain multiple entries. So, we may need different tables and different IDs. |
| Blogging Pages: Posts | PostID – we plan to have one post’s text (with one or more headers) per page. So, we may need only one ID. |
| Homepage items | HomepageID – we need to keep track of the items on the homepage that have changeable captions and content text. |

| | |
|------------------|--|
| Popup | PopupID – we probably will want to store the text that is needed for different popups in one table. |
| Navigation items | <p>NavItemID – we should be able to manage different type of navigation-related items</p> <ul style="list-style-type: none"> • all side pages sections and subsections (side bar content) items • Site Map sections and subsections • Site Map subsections explanatory text items <p>all from one table, where we have one record per item, and then the relevant fields that designate the record as a section or subsection similarly to what is referred below, in other subsections, as Parent Items and Dependent Items, and other fields that contain the necessary data.</p> |

Whatever ID types we will use, these IDs must work for our data displaying, content management and search functionalities throughout the application.

So, please let me know, what your recommendations are in these areas.

Overview and Legend

Below the header row, we have from left to right,

- the Item’s Text area,
- then in the middle the Item’s Data and Item’s Processing Options areas,
- and then in the right the Item’s Response Text area.

One Item’s Text area, Item’s Data and Item’s Processing Options area, and Item’s Response Text area combination:

| | | |
|-------------|---------------------------|----------------------|
| Item’s Text | Item’s Data | Item’s Response Text |
| | Item’s Processing Options | |

Couple of definitions:

- Reply is the administrator posted reply to a question, comment or reply that was submitted by a website visitor.
- Response is the response that an administrator send to the visitor by posting it either on the visitor’s profile or by sending it via email, or both.

Basic Principles

- We have one Item’s Text area, Item’s Data and Item’s Processing Options areas and Item’s Response Text area combination per item.
- We have four types of items:
 - Items that are submitted by website visitors
 - (1) questions
 - (2) comments
 - (3) replies
 - Administrator added items
 - (4) replies, that an administrator adds to the submitted items.
- The items in the left-hand column will either end up on the website, or will be deleted completely.

- Everything in the middle column is used only for individual items processing and posting purposes.
- Nothing in the right-hand column will end up on the website. The text in the right-hand column will be text that will be sent as a direct response to the visitor who submitted the item.

However, we will try to set things up so, that we can minimize the number of instances that require such extra responses. So, for most of the items the right-hand column will (hopefully) stay empty.

Item's Text

Item's text is the unhandled (1) question's, (2) comment's or (3) reply's text, or (4) admin's reply text.

(The latter – that is, number (4), admin's reply text – is for instances when an admin replies to a submitted question, comment or reply. Every such admin-generated reply should be in the left-hand text box window column, below the submitted question, comment or reply. This is further explained below.)

We want to set up the items text boxes so, that the text within them is visible without scrolling within the individual text boxes. This is **very important**. That is, we don't want to force the admins to do scrolling within the individual text boxes when they review the submitted items text. That additional scrolling would slow down the review process and, thus, would reduce productivity.

We will have a character limit for submitting question, comment and reply text, and the same character limit should also be applied to admins' entering text in the left and right hand text boxes. Most likely we will set 1000 character limit.

So, we probably want to set the text boxes up so, that their height is sufficient for accommodating the text. However, because the 1000 character limit can result in different number of lines of text, ideally, the left hand text boxes are set up so, that they have a fixed width, but do not have a fixed height. Ideally, the text box height is adjusted automatically so, that during the reviews the item's text within the text box is all visible without scrolling.

Question: Can you do this? If not, what solution do you recommend?

Item's Data

In the Item's Data portion we have:

EntryID mm/dd/yy

PostID ParentItemID

VisitorID Username

Default processing

Alert!

Proc mm/dd/yy

Admin who processed

Post mm/dd/yy

Admin who posted

Response posted

Closed mm/dd/yy

Admin who closed

- EntryID is the automatically generated Primary Key ID of the item.
mm/dd/yy is the month, day and year when the item was submitted.
- As is explained above, in the Explanations subsection, PostID is the item post's ID.
ParentItemID is the EntryID of the parent item. ParentItemID are addressed below.
When the item is the parent itself, then for the ParentItemID we could repeat the EntryID.

- VisitorID is the VisitorID of the person who submitted the item. VisitorID should be a link to the user interface that displays Abuse Control System related data that we have collected about the visitor.

Username is the username of the person who submitted the item. Username should be a link to the visitor's full profile.

- Default processing – Indicates, whether or not default processing has been applied to the item. Not checked off means, that the default processing has not been applied. Checked off , as is shown in this example, means that default processing has been applied.

Default processing checkbox should be enabled, that is, all admin levels should be able to click it manually in order to change its value.

- Alert! – When the Default Processing button is clicked this field should be checked off for these items that are on either the Quarantined Offensive List or Deleted Offensive List.

- Proc is a checkbox, that shows, whether or not the item has been processed. This checkbox is by default not checked off and is checked off only when the Process button is clicked. Here, simply for the sake of giving examples, the Proc is shown as checked off. However, as an example, it could be equally well be shown as not being checked off.

mm/dd/yy is the month, day and year when the item was processed.

Admin who processed is that admin's VisitorID and Username who processed the item.

Proc checkbox should be enabled, that is, all admin levels should be able to click it manually in order to change its value.

- Post is a checkbox, that shows, whether or not the item has been posted. This checkbox is by default not checked off and is checked off only when the Post button is clicked.

mm/dd/yy is the month, day and year when the item was posted.

Admin who posted is that admin's VisitorID and Username who posted the item.

Post checkbox should be enabled, that is, the admins should be able to click it manually in order to change its value. However, only MgtAdmin and higher should be able to change this field's value.

- Response posted – Indicates, whether or not a response to the visitor has been processed for the item.

By default, the response should be posted in the profile. However, as is discussed elsewhere in this file, we would want to have a functionality that allows to select, whether to post individual responses in the profile, both post in the profile and send them via email, or send them only via email.

Question: Please let me know, if this is possible.

This checkbox is by default not checked off and is checked off only when the Post button is clicked.

Post checkbox should be enabled, that is, the admins should be able to click it manually in order to change its value. However, only MgtAdmin and higher should be able to change this field's value.

- Closed is a checkbox, that shows, whether or not the item has been closed. This checkbox is by default not checked off and is checked off only when the Close All button is clicked.

mm/dd/yy is the month, day and year when the item was closed.

Admin who closed is that admin's VisitorID and Username who closed the item.

Closed checkbox should be enabled, that is, the admins should be able to click it manually in order to change its value. However, only MgtAdmin and higher should be able to change this field's value.

Setting Up ParentItemID

ParentItemID is the EntryID of the parent item. For example, if there is a comment, and somebody submits a reply to it, then that comment is the parent item, and the reply is a dependent item.

Similarly, a question that has a reply (that an admin writes through the CMS) is the parent item for that reply.

We could set this up in the following way.

- In the table structure we can have a ParentItemID column, which is an extra column with the same characteristics that the EntryID field has.
- When Item Type of “Question” or “Comment” is submitted through the CreativityModel.com website, it is a parent item and gets its own EntryID copied to its ParentItemID field.
- When the Reply link is clicked on the website, we would want to identify that item’s EntryID, to which the reply belongs to. To put it differently, we would want to identify the reply item’s parent item EntryID. That EntryID gets copied to the reply item’s record ParentItemID field.

Similarly, when we insert new Reply records, we should copy the relevant records into the ParentItemID field.

This way, all the items that belong under the same parent item have the same value in the ParentItemID field.

- We could have a separate Yes/No column for identifying parent items. This would be helpful during the deletions and it may be helpful during certain sorting procedures as well.

Alternatively, whenever a record’s EntryID field value equals its ParentItemID field value, it is a parent item. Otherwise, it is a dependent item.

My guess is, that most blogging software already have some sort of functionality in place for identifying what I here call “parent items” and “dependent items.”

Please let me know, what your recommendations are in this area.

Item’s Processing Options

In this category we have option buttons, which means, that the user should select one value among the available options.

The option buttons area should be clickable, that is, admins should be able to select an option from this area manually. In addition, the application should select the options as is described in this section.

For the item’s Processing Options we have:

Good, no reply/resp

Good, reply needed

Good, rsp Gr [1-10]

Good, both reply/resp

Delete, no response

Delete, rsp Gr [1-10]

ATo [Admin drop-down]

- “Good, no reply/resp” means, that the item is good for posting and neither reply nor response is needed.

“Good, no reply/resp” should be the default option for the comments and replies on the No Problem Detected list.

- “Good, reply needed” means, that the item is good for posting, but reply is needed.

“Good, reply needed” should be the default option for the questions on the No Problem Detected list.

- “Good, rsp Gr [1-10] ” means, that the item is good for posting, but response is needed.

Gr [1-10] is here a symbol for a drop-down, that contains numeric options 1 to 10.

The user should be able to select an option from that drop-down.

The default value should be 1.

- “Good, both reply/resp” means, that the item is good for posting and both reply and response are needed.

- “Delete, no response” means, that the item is no good for posting, should be deleted and neither reply nor response is needed.
- “Delete, rsp Gr [1-10]” means, that the item is no good for posting, should be deleted, but response is needed.

“Delete, rsp Gr [1-10]” should be the default option for the items on the Quarantined Offensive and Deleted Offensive lists.

Gr [1-10] is here a symbol for a drop-down, that contains numeric options 1 to 10.

The user should be able to select an option from that drop-down.

The default value should be 2 for the items on the Quarantined Offensive List, and 3 for the items on the Deleted Offensive List.

- “ATo [Admin drop-down]” means, that the item is re-assigned to another administrator.

[Admin drop-down] is here a symbol for a drop-down, that contains a list of all the admins, who have been assigned to this feature group.

Item’s Response Text

Item’s response text is in the right-hand window. Only these items will have the response text that need a response. Responses are posted in the visitor’s profile or will be sent to the visitor via email, or both are posted in the profile and sent via email.

We should set the CMS up so, that by default all responses are posted in the visitor’s profile. However, the admins should have an option to either (a) both post the response in the visitor’s profile and send it via email or (b) send it only via email.

Because we anticipate that only a relatively small amount of submitted items will need a response (hopefully, much less than 10%), as far as table structure development is concerned, we could consider developing the table structure so, that responses are in a separate linked table.

To put it differently, instead of having a field in the table that must accommodate quite a lot of text, but is used relatively seldom, we could set it up as a linked table.

Please let me know, which option is better in your opinion.

Item’s Text Formatting

The principles outlined here, in this subsection, apply to both submitting items (questions, comments, replies, inquiries) via CreativityModel.com website, and to submitting replies to and responses via CMS.

I think, that we will not have any formatting (bolded text, italics, colored text, etc) options available for this. Let’s keep it simple.

However,

(1) we do need the inserted URLs to show up as links, and

(2) we should be able to insert links that form Custom Pages. These links should also show up as clickable links. Custom Pages are described in the main website text file.

Item’s Processing Buttons

Default Processing (button)

Location

Unlike most of the other buttons, the Default Processing button should be on the top of the page, so that the user can click it before he or she scrolls down the page to view the items (that is, the user interface content).

Must Be Applied Only Once!

In the Item's Data area the Default processing record indicates, whether or not Default processing has been performed for the individual item. Clicking the Default Processing button should perform the Default processing as is explained here.

When the Default Processing button is clicked, then nothing should be done for these records, that already have the Default processing field checked off. (The Default processing field is displayed in the Item's Data area.)

This is very important, because we do not want to create double reply records (empty text boxes) for these submitted items, that require replies.

Must Apply the Default Options

For these items – and only for these items – for which the Default processing field has not been checked off, that is, for which the default processing has not been performed yet, clicking on the Default Processing button should:

- apply the default option to the item's Processing Options field
- and after that, change the Default processing field value to Yes (check off Default processing field value)

The default options are applied by the List Type and Item Type combinations as follows:

- Items on the No Problem Detected List
 - Comments and replies on the No Problem Detected list – “Good, no reply/resp” option should be selected.

The idea here is, that by default these comments and replies that are on the No Problem Detected List only need to be posted on the website, without any additional processing.

- Questions on the No Problem Detected List –
 - “Good, reply needed” option should be selected.
 - In addition, for every Question item type that is on the No Problem Detected list, a new records should be inserted directly below the item.

The idea here is, that by default these questions that are on the No Problem Detected List do need a reply that has to be posted on the website. Accordingly, we start this process by inserting the blank Reply records into the overall workload (stream) of items.

So, directly below the item's record that has this Item Processing Option selected, a new item's record should be created.

- New item's Item Type is Reply.
- New item's List Type is No Problem Detected.
- That new item should have blank (unfilled) text window in the left hand side Item's Text area.
- In the Item's Data area should be:
 - EntryID mm/dd/yy – both fields should be filled automatically.
 - PostID ParentItemID – both fields should be filled automatically.
 - VisitorID Username – both fields should be filled automatically with that admin's data who is using the CMS for processing the data.
 - Default processing – should be checked off for the record.
 - Alert! – should not be checked off for the record.
 - Proc mm/dd/yy – no selection (the record has not been processed yet).
 - Admin who processed – no selection (the record has not been processed yet).
 - Post mm/dd/yy – no selection (the record has not been posted yet).

- Admin who posted – no selection (the record has not been posted yet).
 - Response posted – no selection (the record has not been posted yet).
 - In the Item's Processing Options area should be:
 - For the newly added record, in the "Good, no reply/resp" option should be automatically (that is, programmatically) selected for the item by the application.
 - That new item should have blank (unfilled) text window in the right hand side Item's Response Text area.
- Items on the Quarantined Offensive List
 - Alert! field should be checked off. This field is displayed in the Item's Data area.
 - "Delete, rsp Gr [1-10]" option should be selected. Option number 2 should be selected for the Gr drop-down.

The idea here is, that by default these items that are on the Quarantined Offensive List, will be deleted and an automated response will be sent to the visitor. However, the admins need to be very careful here, and should read and evaluate every such submitted item before proceeding further. It is likely, that a substantial percentage of such items will be actually posted, because the language is not so offensive that it would create an actual obstacle to posting the item.
- Items on the Deleted Offensive List
 - Alert! field should be checked off. This field is displayed in the Item's Data area.
 - "Delete, rsp Gr [1-10]" option should be selected. Option number 3 should be selected for the Gr drop-down.

The idea here is, that by default these items that are on the Deleted Offensive List, will be deleted and an automated response will be sent to the visitor.

Response Options (link)

This link should bring up a pop-up that contains prepared (previously written, ready to use) responses.

This user interface, that contains these responses, is needed for review of the responses. Review is needed mostly for refreshing one's memory. For example, I may remember that Response Number 2 was the response that explains politely to the visitor, why a submitted item will be deleted. However, I may remember it incorrectly – maybe it was actually Response Number 3 that I need to use, or maybe somebody has changed these responses since I last used the CMS. Please let me know, if you have questions about this.

We also need a user interface, where we can add, delete and modify these prepared responses. MgtAdmin and higher should be able to use that user interface.

Apply Response [] to Group []

The [] stand for drop-down boxes.

The "Apply response" part of this should be a button, that is followed by two drop-down boxes.

The idea is, that the user (an admin) divides certain responses into groups by using the Gr [1-10] drop-down. Thereafter, the user selects a pre-written response by its number, and then selects to which group to apply it to by the Group number.

Please let me know, if you have questions or comments regarding this functionality part.

Apply Spelling Check Button

Clicking this button should check the spelling of the

- newly admin added replies in the left-hand text window (the admin added replies are further explained below)
- admin added responses in the right-hand text window

Question: Please let me know, if this can be done.

Assign Selected To [Admin drop-down]

Allows assigning all the currently displayed entries to the admin that has been selected from the [Admin drop-down]. Should work with both filtered and unfiltered data.

The Process button, that is discussed below, does the same job for individually selected entries. This "Assign Selected To [Admin drop-down]" link or button should apply this selection uniformly to every item that is currently displayed.

The idea is, that an admin may log in and decide, that all the current workload in a certain area should be handled by a particular admin. This functionality allows to indicate this. For example, I may want to assign work to trainees this way.

Process Button

Button's Functionality

Process button should activate functionality, that processes items in accordance with each item's Processing Options. Just in case, I will repeat these options here:

- Good, no reply/resp
- Good, reply needed
- Good, rsp Gr [1-10]
- Good, both reply/resp
- Delete, no response
- Delete, rsp Gr [1-10]
- ATo [Admin drop-down]

When the Process button is clicked, first, the PostID, ParentItemID, EntryID sorting option should be applied (programmatically) and in the top of the page sorting drop-down the following option should be selected (programmatically):

Sort By (drop-down)

PostID, ParentItemID, EntryID

Further, every item that is currently displayed, should be processed in accordance with the selected option, as is described in the table below.

Filtering

Please note, that if the user applies filtering before clicking the Process button, then the Process button actions should apply only to the filtered data that is currently being displayed.

Proceed Regardless of the Default Processing Field Value

Unless specified otherwise in the table below, the Process button and its functionality should apply to each of the displayed items, regardless of the Default Processing field value.

| | |
|---------------------|---|
| Good, no reply/resp | OPTION 1 If the left-hand, submitted item's text window field is empty (no characters at all), then nothing should be done for the record. OPTION 2 If the left -hand, submitted item's text window field is not empty (contains 2 or more |
|---------------------|---|

| | |
|----------------------------|---|
| | <p>characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record.</p> |
| <p>Good, reply needed</p> | <p>OPTION 1</p> <p>If the record does have in the Item’s Data area the Default processing field checked off AND</p> <p>if the left-hand, submitted item’s text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record.</p> <p>OPTION 2</p> <p>If the record does not have in the Item’s Data area the Default processing field checked off, then a blank Reply record should be created for the item directly below the item’s record that has this Item Processing Option selected (just like it is done during default processing for the relevant items):</p> <ul style="list-style-type: none"> ○ New item’s Item Type is Reply. ○ New item’s List Type is No Problem Detected. ○ That new item should have blank (unfilled) text window in the left hand side Item’s Text area. ○ In the Item’s Data area should be: <ul style="list-style-type: none"> ▪ EntryID mm/dd/yy – both fields should be filled automatically ▪ <u>PostID</u> <u>ParentItemID</u> – both fields should be filled automatically ▪ <u>VisitorID</u> <u>Username</u> – both fields should be filled automatically with that admin’s data who is using the CMS for processing the data. ▪ <input checked="" type="checkbox"/> Default processing – should be checked off for the record. ▪ <input type="checkbox"/> Alert! – should not be checked off for the record. ▪ <input type="checkbox"/> Proc mm/dd/yy – no selection (the record has not been processed yet). ▪ Admin who processed – no selection (the record has not been processed yet). ▪ <input type="checkbox"/> Post mm/dd/yy – no selection (the record has not been posted yet). ▪ Admin who posted – no selection (the record has not been posted yet). ▪ <input type="checkbox"/> Response posted – no selection (the record has not been posted yet). ○ In the Item’s Processing Options area should be: <ul style="list-style-type: none"> ▪ For the newly added record, in the “Good, no reply/resp” option should be automatically (that is, programmatically) selected for the item by the application. ○ That new item should have blank (unfilled) text window in the right hand side Item’s Response Text area. <p>Please note, that when the Process button is clicked, this should be done for every record, that has this “Good, reply needed” Item Processing Option selected and does not have in the Item’s Data area the Default processing field checked off.</p> |
| <p>Good, rsp Gr [1-10]</p> | <p>OPTION 1</p> <p>If the right-hand, Response text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> <p>If the right-hand, Response text window field is not empty (contains 2 or more</p> |

| | |
|-----------------------|--|
| | characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record. |
| Good, both reply/resp | <p>OPTION 1</p> <p>If the record does have in the Item’s Data area the Default processing field checked off</p> <p>AND</p> <p>if the left -hand, submitted item’s text window field is not empty (contains 2 or more characters),</p> <p>AND</p> <p>If the right-hand, Response text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record.</p> <p>OPTION 2</p> <p>If the record does not have in the Item’s Data area the Default processing field checked off, then a blank Reply record should be created for the item directly below the item’s record that has this Item Processing Option selected (just like it is done during default processing for the relevant items):</p> <ul style="list-style-type: none"> ○ New item’s Item Type is Reply. ○ New item’s List Type is No Problem Detected. ○ That new item should have blank (unfilled) text window in the left hand side Item’s Text area. ○ In the Item’s Data area should be: <ul style="list-style-type: none"> ▪ EntryID mm/dd/yy – both fields should be filled automatically ▪ <u>PostID</u> <u>ParentItemID</u> – both fields should be filled automatically ▪ <u>VisitorID</u> <u>Username</u> – both fields should be filled automatically with that admin’s data who is using the CMS for processing the data. ▪ <input checked="" type="checkbox"/> Default processing – should be checked off for the record. ▪ <input type="checkbox"/> Alert! – should not be checked off for the record. ▪ <input type="checkbox"/> Proc mm/dd/yy – no selection (the record has not been processed yet). ▪ Admin who processed – no selection (the record has not been processed yet). ▪ <input type="checkbox"/> Post mm/dd/yy – no selection (the record has not been posted yet). ▪ Admin who posted – no selection (the record has not been posted yet). ▪ <input type="checkbox"/> Response posted – no selection (the record has not been posted yet). ○ In the Item’s Processing Options area should be: <ul style="list-style-type: none"> ▪ For the newly added record, in the “Good, no reply/resp” option should be automatically (that is, programmatically) selected for the item by the application. ○ That new item should have blank (unfilled) text window in the right hand side Item’s Response Text area. |
| Delete, no response | Check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record. |
| Delete, rsp Gr [1-10] | If the right-hand, Response text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and |

| | |
|-----------------------|---|
| | “Admin who processed” field entries for the record. |
| ATo [Admin drop-down] | <p>OPTION 1</p> <p>If an admin has been chosen from the [Admin drop-down], do nothing.</p> <p>OPTION 1</p> <p>If an admin has not been chosen from the [Admin drop-down], select from the [Admin drop-down] that admin, who clicked the Process button.</p> |

Post Button

Admin Group Dependent Handling

OrgAdmin and higher should be able to use the Post button.

If an admin, who belongs into RevAdmin group, clicks on the Post button, the application should not apply Post button-related functionality. Instead, the application should only post a message:

Please make sure that all the items have been processed. Use the Process button to process the items.

The administrator, who reviews your work, will post the items that you have processed.

If you need additional information about the processing and posting related functionalities, please contact the administrator who reviews your work.

Processing Must Be Done Before Posting

Processing button functionality can be applied, whether or not the Default Processing field value is Yes.

However, Post button functionality **cannot** be applied to records, that have No for the Proc (Processing) field value.

That is, the Post button and its functionality should apply only to these items, for which the processing has been completed and the Proc field has the Yes value.

Automatic Applying of Spell Checker Before Posting

I would like to set up the posting so, that spell checker is automatically applied before the rest of the posting functionality is applied.

Question: Please let me know, if that is possible.

Proceed In Accordance With the Item’s Processing Options

| | |
|---------------------|---|
| Good, no reply/resp | <p>OPTION 1</p> <p>If the left-hand, submitted item’s text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> <p>If the left -hand, submitted item’s text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Post checkbox and fill in the relevant “mm/dd/yy” and “Admin who posted” field entries for the record.</p> |
| Good, reply needed | <p>OPTION 1</p> <p>If the left-hand, submitted item’s text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> |

| | |
|-----------------------|--|
| | <p>If the left -hand, submitted item's text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Post checkbox and fill in the relevant "mm/dd/yy" and "Admin who posted" field entries for the record.</p> |
| Good, rsp Gr [1-10] | <p>OPTION 1</p> <p>If the right-hand, Response text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> <p>If the right-hand, Response text window field is not empty (contains 2 or more characters), then</p> <p>2.0. If – and only if – the Response posted check box has not been checked off <input type="checkbox"/></p> <p>2.1. Post the response in the visitor's profile</p> <p>2.2. Check off <input checked="" type="checkbox"/> the Response posted check box</p> <p>2.3. Check off <input checked="" type="checkbox"/> the Post checkbox and fill in the relevant "mm/dd/yy" and "Admin who posted" field entries for the record.</p> |
| Good, both reply/resp | <p>OPTION 1</p> <p>If the left-hand, submitted item's text window field is empty (no characters at all), or if the right-hand, Response text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> <p>If the left-hand, submitted item's text window field is not empty (contains 2 or more characters),</p> <p>AND</p> <p>If the right-hand, Response text window field is not empty (contains 2 or more characters), then</p> <p>2.0. If – and only if – the Response posted check box has not been checked off <input type="checkbox"/></p> <p>2.1. Post the response in the visitor's profile</p> <p>2.2. Check off <input checked="" type="checkbox"/> the Response posted check box</p> <p>2.3. Check off <input checked="" type="checkbox"/> the Post checkbox and fill in the relevant "mm/dd/yy" and "Admin who posted" field entries for the record.</p> |
| Delete, no response | Delete the record. |
| Delete, rsp Gr [1-10] | <p>If the right-hand, Response text window field is not empty (contains 2 or more characters), then</p> <p>1.1 Post the response in the visitor's profile, and</p> <p>1.2 Delete the record.</p> |
| ATo [Admin drop-down] | <p>OPTION 1</p> <p>If an admin has been chosen from the [Admin drop-down], do nothing.</p> <p>OPTION 1</p> <p>If an admin has not been chosen from the [Admin drop-down], select from the [Admin drop-down] that admin, who clicked the Post button.</p> |

All items that have Yes for the Post field value, should appear on the website.

All items that have Yes for the Response posted field value, should appear in the visitors profiles as is specified in the Visitors Submissions section of this file.

Close All Button

Close All button should mark all these items Closed field with the Yes value Closed, that are currently displayed on the user interface. So, the Close All button should work with the filtered data.

Only MgtAdmin and higher should be able to use the Close All button.

If an admin, who belongs into RevAdmin or OrgAdmin group, clicks on the Close All button, the application should not apply the Close All button-related functionality. Instead, the application should only post a message:

Please leave these items open for further review.

Item's, that have been closed, should no longer be displayed through this user interface (other than in cases when Parent Items are displayed, as is specified elsewhere in this subsection).

Confirmation Messages

Click on the Process button and on the Post button should bring up the confirmation message with two options, one of which allows to cancel the operation and other which allows to proceed with it (for example, Cancel and OK options).

We will specify these messages during the development. For the deletions, the message may something like "You are about to delete items from the database. Do you want to proceed?"

For example, we will certainly want to have a confirmation message for the deletions, before the items are actually deleted. However, we don't want to have a separate confirmation message for every to-be-deleted item. That is, when there are, let's say, 10 items that will be deleted, we don't want to have 10 separate confirmation messages about that, only one. So, it probably is a good idea to set up the confirmation messages so, that a check is run for each type of confirmation message, that checks whether or not the confirmation message should appear, and then the application proceeds accordingly.

Deletions

Once a question, comment or reply is deleted, it is deleted for good. That is, it is actually deleted from the database.

We would want to set up the deletions so, that when a ParentItemID is deleted, every dependent EntryID is deleted with it. That is, we do not want any "orphan" ItemIDs to be left out on the website.

However, we can delete dependent EntryID records without deleting the ParentItemID record, or other dependent EntryID records under the same ParentItemID record.

ParentItemID are addressed above, in a subsection Setting Up ParentItemID.

Please let me know, if you have any questions or comments in this area.

Filtering

Exception to Not Displaying Closed Items

Through this user interface we work with only these items, that have not been closed yet. Accordingly, all items that show up when filtering is applied, should be those that have not been closed yet. So, Closed is always No.

There is one exception to this. When the user selects List Type Filter, the Replies with Parent Items option, and applies it, replies should be listed together with their parent items, whether the parent items have been closed or not.

Generally, I will try to set things up so, that we will write the replies to the questions so, that we can post both the question and the reply to it together, at the same time. However, there may be plenty of instances, when we don't have time to write the replies on time, but do need to post the questions on the website (because we want

to post everything within 2 days at the most). In such instances, we will write the replies later. In order to do that, we need to be able to identify the replies that need to be written, and also see them together with the relevant questions. Finding the not yet posted replies together with their parent items helps to do that. Such parent items Closed field value should be left to No. However, it may happen, that sometimes their Closed field value has been set to Yes. So, when we search for items with their parent items, we would want to see the Closed items as well.

Other Filtering Features

All the secondary filters should be drop-downs of the relevant data. For example, Secondary Item Filters, EntryID drop-down should contain all the items ItemIDs that are relevant to the currently displayed data. The user can then select an item from the drop-down, and should be able to filter the data accordingly. The same applies to other Secondary Item Filters. (The relevant values can be filtered for each of the Secondary Item Filters drop-downs. They all have their own Primary Keys, that can then be applied as filters.)

Users should be able to apply filters consecutively. That is, before clicking the Apply Filter button, the users should be able make selections from different filter categories, so that they can apply one filter on top of another, in any order.

Remove Filter button should remove any filters, display all items and restore the default sorting order.

Please let me know if you have any comments or questions about this.

I will repeat the filtering options below:

List Type Filter (drop-down)

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Item Type Filter (drop-down)

Questions only

Comments only

Replies only

Replies with Parent Items

Primary Item Data Filter (drop-down)

Alert! Yes

Alert! No

Default processing Yes

Default processing No

Processed Yes

Processed No

Post Yes

Post No

Response posted Yes

Response posted No

Secondary Item Data Filters

EntryID (drop-down)

PostID (drop-down)

ParentItemID (drop-down)

VisitorID (drop-down)

Username (drop-down)

Admin who processed (drop-down)

Admin who posted (drop-down)

Primary Item Processing Filter (drop-down)

Good, no reply/resp

Good, reply needed

Good, rsp Gr [1-10]

Good, both reply/resp

Delete, no response

Delete, rsp Gr [1-10]

Secondary Item Processing Filter

ATo Admin (drop-down)

Apply Filter (button)

Remove Filter (button)

Navigation

We probably want to put up to 100 items per page (vertically, as is shown in the above two item mockup). The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.

Unhandled Inquiries

Item Types and List Types

According to our definitions, an item is an individual parts of a task category that need to be processed through the CMS. So, **Item Types** in the case of unhandled inquiries are the inquiry types. Different inquiry types are listed in the Visitor Entries subsection of the main website development specs file.

List Types are here the same as they are for all the visitor submissions that are checked for potentially offensive language: No Problem Detected, Quarantined Offensive and Deleted Offensive.

Similarities to Other User Interfaces

Inquiry handling is similar to question, comment and reply handling. The major differences are:

- Inquiries and their responses are not posted on the website.
- During processing, every inquiry will either (a) get a response and will be stored for a limited, defined period of time, or (b) will be deleted.
- Total number of item types – that is, inquiry types in this case – is not fixed. So, we should try to set the CMS up so that when a new inquiry type is added, the relevant entry will appear in the CMS, too.

Further, CMS users should be able to establish additional categories that correspond to the Inquiry Types. CMS user who administer the inquiries should be able to sort these inquiries by type and to spot effortlessly, in what category there are inquiries that need responses.

About the User Interfaces

Below are mockup descriptions of two interfaces:

- Unhandled Workload Review provides data about the unhandled workflow.
- Unhandled Workload Management user interface is for handling these inquiries, for which the CMS workload related processing has not been completed.

Unhandled Workload Review

Total items for all Item Types

Item Type

Total items

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

This data should be presented for all item (inquiry) types. However, this data should be presented only for these Item Types that have more than 0 (zero) Total items in the unhandled items category. To put it differently, we do not need to list under the Unhandled Workload Review user interface different Item Types that do not have any unhandled workload items. The same principles applies to the Unhandled Workload Management user interface as well.

Total items for all Item Types should be presented even if the grand total is 0 (zero).

Unhandled Workload Management

Default Processing (button)

Sort By (drop-down)

Default sorting

ParentItemID, InquiryID

List Type Filter (drop-down)

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Primary Item Data Filter (drop-down)

Default processing Yes

Default processing No

Alert! Yes

Alert! No

Processed Yes

Processed No

Resp Yes

Resp No

Response posted Yes

Response posted No

Secondary Item Data Filters

InquiryID (drop-down)

ParentItemID (drop-down)

VisitorID (drop-down)

Username (drop-down)

Admin who processed (drop-down)

Admin who responded (drop-down)

Primary Item Processing Filter (drop-down)

Good, rsp Gr [1-10]

Good, rsp Gr [1-10] with Parent Items

Delete, no response

Delete, rsp Gr [1-10]

Secondary Item Processing Filter

ATo Admin (drop-down)

Apply Filter (button)

Remove Filter (button)

| Item Type List Type | | |
|----------------------------|---|---------------|
| Submitted inquiry text | InquiryID mm/dd/yy Parent: [ParentItemID] <u>VisitorID Username</u> <input checked="" type="checkbox"/> Default processing <input checked="" type="checkbox"/> Alert! <input type="checkbox"/> Proc mm/dd/yy Admin who processed <input type="checkbox"/> Resp mm/dd/yy Admin who responded <input type="checkbox"/> Response posted <input type="checkbox"/> Closed mm/dd/yy Admin who closed | Response text |
| | <ul style="list-style-type: none">• Good, rsp Gr [1-10]• Delete, no response• Delete, rsp Gr [1-10]• ATo [Admin drop-down] | |

Top ^ (link that takes to the top of the page)

Response Options (link)

Apply Response [] to Group []

Apply Spelling Check (button)

Assign Selected To [Admin drop-down]

Process (button)

Respond (button)

Close All (button)

Sorting and Headers

Sorting Options and Header Display

We have two sorting options:

- Default sorting
- ParentItemID, InquiryID

Default Sorting

By default,

- all the data should be displayed
- all the items should be sorted (1) by the Item Type, (2) then by the List Type, (3) then by the ParentItemID, and (4) then by the InquiryID.

In these cases, the headers should contain the relevant Item Type and List Type information.

ParentItemID, InquiryID Sorting Option

Whenever filtering is being applied, so that only selected data is being displayed, the second sorting option should be applied as well:

ParentItemID, InquiryID

In these cases, the headers could state for both the Item Type and List Type N/A, that is, repeat the N/A for both of them.

Overview and Legend

Inquiry handling user interface basic layout is similar to questions, comments and replies user interface:

| | | |
|-------------|---------------------------|----------------------|
| Item's Text | Item's Data | Item's Response Text |
| | Item's Processing Options | |

Item's Text

Item's text is the unhandled inquiry's text.

Item's Data

In the Item's Data portion we have:

InquiryID mm/dd/yy

Parent: [ParentItemID]

VisitorID Username

Default processing

Alert!

Proc mm/dd/yy

Admin who processed

Resp mm/dd/yy

Admin who responded

Response posted

Closed mm/dd/yy

Admin who closed

- InquiryID is the automatically generated Primary Key ID of the item.
mm/dd/yy is the month, day and year when the item was submitted.
- ParentItemID is the InquiryID of the parent item.
“Parent:” is a label
“[ParentItemID]” is a textbox that is empty by default.
ParentItemIDs are further addressed below.
- VisitorID is the VisitorID of the person who submitted the item. VisitorID should be a link to the user interface that displays Abuse Control System related data that we have collected about the visitor.
Username is the username of the person who submitted the item. Username should be a link to the visitor’s full profile.
- Default processing – Indicates, whether or not default processing has been applied to the item. Not checked off means, that the default processing has not been applied. Checked off , as is shown in this example, means that default processing has been applied.
Default processing checkbox should be enabled, that is, all admin levels should be able to click it manually in order to change its value.
- Alert! – When the Default Processing button is clicked this field should be checked off for these items that are on either the Quarantined Offensive List or Deleted Offensive List.
- Proc is a checkbox, that shows, whether or not the item has been processed. This checkbox is by default not checked off and is checked off only when the Process button is clicked. Here, simply for the sake of giving examples, the Proc is shown as checked off. However, as an example, it could be equally well be shown as not being checked off.
mm/dd/yy is the month, day and year when the item was processed.
Admin who processed is that admin’s VisitorID and Username who processed the item.
Proc checkbox should be enabled, that is, all admin levels should be able to click it manually in order to change its value.
- Resp is a checkbox, that shows, whether or not the item has been responded to. This checkbox is by default not checked off and is checked off only when the Respond button is clicked.
mm/dd/yy is the month, day and year when the item was responded to.
Admin who responded is that admin’s VisitorID and Username who responded to the item.
Resp checkbox should be enabled, that is, the admins should be able to click it manually in order to change its value. However, only MgtAdmin and higher should be able to change this field’s value.
- Response posted – Indicates, whether or not a response to the visitor has been posted in the visitor’s profile (and/or sent via email). This checkbox is by default not checked off and is checked off only when the Respond button is clicked.
Response posted checkbox should be enabled, that is, the admins should be able to click it manually in order to change its value. However, only MgtAdmin and higher should be able to change this field’s value.
- Closed is a checkbox, that shows, whether or not the item has been closed. This checkbox is by default not checked off and is checked off only when the Close All button is clicked.
mm/dd/yy is the month, day and year when the item was closed.
Admin who closed is that admin’s VisitorID and Username who closed the item.
Closed checkbox should be enabled, that is, the admins should be able to click it manually in order to change its value. However, only MgtAdmin and higher should be able to change this field’s value.

Setting Up ParentItemID

ParentItemID is the InquiryID of the parent item. We want to set this up so, that we can link selected inquiries together. For example, when a visitor sends an inquiry, and then another inquiry, where he or she lists the previous inquiry ID, then that previous inquiry ID is the ParentItemID.

We can set this up somewhat similarly to questions, comments and replies.

- In the table structure we can have a ParentItemID column, which is an extra column with the same characteristics that the InquiryID field has.
- When an item's ParentItemID is known and an admin fills it in (manually), then that value should be used to link the new inquiry to a previously saved inquiry. The rest of the items, and non-matching items, will get their own InquiryID copied into the ParentItemID field during the Default Processing (which is described below).

So, the relevant functionality is pretty simple to build. It operates (1) by filling in records in a designated ParentItemID field, some of them manually, most of them programmatically by copy and paste, and (2) by sorting by the ParentItemID field.

For the admins, I chose manual filling in of the ParentItemID value. The nature of how the inquiries will most likely be received, responded to and maintained, will be such that for Version 1 every other system would probably become too complex to build. It's not an ideal solution, but let's see, how it will work.

- In addition to the ParentItemID field that contains numeric values, we could have a separate Linked Yes/No column for identifying linked items. This would be helpful during the deletions and it may be helpful during certain sorting procedures as well.

The idea is this. We will keep inquiries for a specified amount of time – most likely for 21 days. Thereafter we will delete them. However, if an older inquiry is linked to a newer inquiry, that was submitted less than 21 days ago, we would not want to delete that older inquiry. Using a Yes/No column, which we could name Linked, would be an easy way to identify such records. However, we can build the same functionality without such an additional column as well.

Please let me know, what your recommendations are in this case.

Item's Processing Options

In this category we have option buttons, which means, that the user should select one value among the available options. For the item's Processing Options we have:

Good, rsp Gr [1-10]

Delete, no response

Delete, rsp Gr [1-10]

ATo [Admin drop-down]

- "Good, rsp Gr [1-10]" means, that the item needs a response.

Gr [1-10] is here a symbol for a drop-down, that contains numeric options 1 to 10.

The user should be able to select an option from that drop-down.

The default value should be 1.

- "Delete, no response" means, that the item should be simply deleted.
- "Delete, rsp Gr [1-10]" means that the item should be deleted, but a response is needed.

"Delete, rsp Gr [1-10]" should be the default option for the items on the Quarantined Offensive and Deleted Offensive lists.

Gr [1-10] is here a symbol for a drop-down, that contains numeric options 1 to 10.

The user should be able to select an option from that drop-down.

The default value should be 2 for the items on the Quarantined Offensive List, and 3 for the items on the Deleted Offensive List.

- “ATo [Admin drop-down]” means, that the item is re-assigned to another administrator.

[Admin drop-down] is here a symbol for a drop-down, that contains a list of all the admins, who have been assigned to this feature group.

Item’s Response Text

Item’s response text is in the right-hand window. Responses are posted in the visitor’s profile or will be sent to the visitor via email, or both are posted in the profile and sent via email.

We should set the CMS up so, that by default all responses are posted in the visitor’s profile. However, the admins should have an option to either (a) both post the response in the visitor’s profile and send it via email or (b) send it only via email.

Item’s Text Formatting

I think, that we will not have any formatting (bolded text, italics, colored text, etc) options available for this. Let’s keep it simple.

However,

(1) we do need the inserted URLs to show up as links, and

(2) we should be able to insert links that form Custom Pages. These links should also show up as clickable links. Custom Pages are described in the main website text file.

Item’s Processing Buttons

Default Processing (button)

Location

Default Processing button should be on the top of the page, so that the user can click it before he or she scrolls down the page to view the user interface content.

Must Be Applied Only Once!

In the Item’s Data area the Default processing record indicates, whether or not Default processing has been performed for the individual item. Clicking the Default Processing button should perform the Default processing as is explained here.

When the Default Processing button is clicked, then nothing should be done for these records that already have the Default processing field checked off. (The Default processing field is displayed in the Item’s Data area.)

Must Apply the Default Options

For these items – and only for these items – for which the Default processing field has not been checked off, that is, for which the default processing has not been performed yet, clicking on the Default Processing button should

(1) Apply the default options to the item’s Processing Options field:

The default options are applied by the Item Type and List Type combinations as follows:

- Items on the No Problem Detected List
 - “Good, rsp Gr [1-10]“ option should be selected, with default value = 1 for Gr
- Items on the Quarantined Offensive List
 - Alert! field should be checked off. This field is displayed in the Item’s Data area.
 - “Delete, rsp Gr [1-10]“ option should be selected. Option number 2 should be selected for the Gr drop-down.

- Items on the Deleted Offensive List
 - Alert! field should be checked off. This field is displayed in the Item's Data area.
 - "Delete, rsp Gr [1-10]" option should be selected. Option number 3 should be selected for the Gr drop-down.

(2) Apply the ParentItemID values, link fields:

- These new, unhandled inquiries, for which the ParentItemID value was not filled in, should get their InquiryID field value copied to the ParentItemID field.
- These new, unhandled inquiries, for which the ParentItemID value was filled in, should be linked to any existing and saved inquiries that have the same ParentItemID value.

It seems that we can accomplish the above by simply doing the following:

- For each record, that at this point has a value in the ParentItemID field, do a programmatic search for a matching records among the previously filled in ParentItemID field values – excluding the current record. One match is sufficient, so, that's all we are looking for.
 - If a match exists, copy the searched for value in the ParentItemID field for the new record to that record's ParentItemID field.

If we will also use the Linked field, mark this field as Yes for the new record.

- If there is no match, that is, if the ParentItemID value was filled in, but there is no previously saved inquiry with matching ParentItemID value, the new record should be treated the same way as if the ParentItemID value was not filled in.

That is, such records should also get their InquiryID field value copied to the ParentItemID field.

These items are not linked. So, if we will use the Linked field, the default value No should remain in place for such records.

Maybe there was an inquiry in the past, that was submitted more than 21 days ago, that had the ParentItemID value that was referenced in such "No match found" instances. However, whatever has been deleted because the 21 day limit has passed, is no longer relevant in this case.

(3) Change the Default processing field value to Yes (check off Default processing field value).

Response Options (link)

This link should bring up a pop-up that contains prepared (previously written, ready to use) responses.

We also need a user interface, where we can add, delete and modify these prepared responses. MgtAdmin and higher should be able to use that user interface.

Apply Response [] to Group []

The [] stand for drop-down boxes.

The "Apply response" part of this should be a button, that is followed by two drop-down boxes.

The idea is, that the user (an admin) divides certain responses into groups by using the Gr [1-10] drop-down. Thereafter, the user selects a pre-written response by its number, and then selects to which group to apply it to by the Group number.

Please let me know, if you have questions or comments regarding this functionality part.

Apply Spelling Check Button

Clicking this button should check the spelling of the admin added responses in the right-hand text window

Question: Please let me know, if this can be done.

Assign Selected To [Admin drop-down]

Allows assigning all the currently displayed entries to the admin that has been selected from the [Admin drop-down]. Should work with both filtered and unfiltered data.

The Process button, that is discussed below, does the same job for individually selected entries. This “Assign Selected To [Admin drop-down]” link or button should apply this selection uniformly to every item that is currently displayed.

The idea is, that an admin may log in and decide, that all the current workload in a certain area should be handled by a particular admin. This functionality allows to indicate this. For example, I may want to assign work to trainees this way.

Process Button

Default Processing

Here, the Process button and its functionality should apply only to those items, for which the default processing has been completed and the Default processing field has the Yes value.

That is, here we want to be sure, that the admins use the Process button’s functionality only for the items, for which they have done the default processing.

Button’s Functionality

Every admin level should be able to use the Process button and its functionality.

Process button should activate functionality, that processes items in accordance with each item’s Processing Options. Just in case, I will repeat these options here:

Good, rsp Gr [1-10]

Delete, no response

Delete, rsp Gr [1-10]

ATo [Admin drop-down]

When the Process button is clicked, first, the ParentItemID, InquiryID sorting option should be applied (programmatically) and in the top of the page sorting drop-down the following option should be selected:

Sort By (drop-down)

ParentItemID, InquiryID

Further, every item that is currently displayed, should be processed in accordance with the selected option, as is described in the table below.

Filtering

If the user applies filtering before clicking the Process button, then the Process button actions should apply only to the filtered data that is currently being displayed.

| | |
|---------------------|---|
| Good, rsp Gr [1-10] | <p>OPTION 1</p> <p>If the right-hand, Response text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> <p>If the right-hand, Response text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record.</p> |
| Delete, no response | Check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who |

| | |
|-----------------------|---|
| | processed” field entries for the record. |
| Delete, rsp Gr [1-10] | If the right-hand, Response text window field is not empty (contains 2 or more characters), then check off <input checked="" type="checkbox"/> the Proc checkbox and fill in the relevant “mm/dd/yy” and “Admin who processed” field entries for the record. |
| ATo [Admin drop-down] | <p>OPTION 1</p> <p>If an admin has been chosen from the [Admin drop-down], do nothing.</p> <p>OPTION 1</p> <p>If an admin has not been chosen from the [Admin drop-down], select from the [Admin drop-down] that admin, who clicked the Process button.</p> |

Respond Button

Admin Group Dependent Handling

OrgAdmin and higher should be able to use the Respond button.

If an admin, who belongs into RevAdmin group, clicks on the Respond button, the application should not apply Respond button-related functionality. Instead, the application should only post a message:

Please make sure that all the items have been processed. Use the Process button to process the items.

The administrator, who reviews your work, will respond to the items that you have processed.

If you need additional information about the processing and responding related functionalities, please contact the administrator who reviews your work.

Processing Must Be Done Before Responding

Respond button functionality cannot be applied to records, that have No for the Proc (Processing) field value.

That is, the Respond button and its functionality should apply only to these items, for which the processing has been completed and the Proc field has the Yes value.

Automatic Applying of Spell Checker Before Responding

I would like to set up the posting so, that spell checker is automatically applied before the rest of the responding functionality is applied.

Question: Please let me know, if that is possible.

Proceed In Accordance With the Item’s Processing Options

| | |
|---------------------|--|
| Good, rsp Gr [1-10] | <p>OPTION 1</p> <p>If the right-hand, Response text window field is empty (no characters at all), then nothing should be done for the record.</p> <p>OPTION 2</p> <p>If the right-hand, Response text window field is not empty (contains 2 or more characters), then</p> <p>1.1. Post the response in the visitor’s profile (and/or send the response via email)</p> <p>1.2. Check off <input checked="" type="checkbox"/> the Response posted field and checkbox</p> <p>1.3. Check off <input checked="" type="checkbox"/> the Resp checkbox and fill in the relevant “mm/dd/yy” and “Admin who responded” field entries for the record.</p> |
|---------------------|--|

| | |
|-----------------------|--|
| Delete, no response | Delete the record. |
| Delete, rsp Gr [1-10] | If the right-hand, Response text window field is not empty (contains 2 or more characters), then 1.1. Post the response in the visitor's profile (and/or send the response via email) 1.2. Delete the record. |
| ATo [Admin drop-down] | OPTION 1 If an admin has been chosen from the [Admin drop-down], do nothing. OPTION 1 If an admin has not been chosen from the [Admin drop-down], select from the [Admin drop-down] that admin, who clicked the Respond button. |

All items that have Yes for the Response posted field value, should appear in the visitors profiles as is specified in the Visitors Submissions section of this file.

Close All Button

Close All button should mark all these items Closed field with the Yes value Closed, that are currently displayed on the user interface. So, the Close All button should work with the filtered data.

Only MgtAdmin and higher should be able to use the Close All button.

If an admin, who belongs into RevAdmin or OrgAdmin group, clicks on the Close All button, the application should not apply the Close All button-related functionality. Instead, the application should only post a message:

Please leave these items open for further review.

Item's, that have been closed, should no longer be displayed through this user interface (other than in cases when Parent Items are displayed, as is specified elsewhere in this subsection).

Confirmation Messages

Click on the Process button, Respond button, or Close button should bring up the confirmation message with two options, one of which allows to cancel the operation and other which allows to proceed with it (for example, Cancel and OK options).

We will specify these messages during the development. For the deletions, the message may something like "You are about to delete items from the database. Do you want to proceed?"

For example, we will certainly want to have a confirmation message for the deletions, before the items are actually deleted. However, we don't want to have a separate confirmation message for every to-be-deleted item. That is, when there are, let's say, 10 items that will be deleted, we don't want to have 10 separate confirmation messages about that, only one. So, it probably is a good idea to set up the confirmation messages so, that a check is run for each type of confirmation message, that checks whether or not the confirmation message should appear, and then the application proceeds accordingly.

Deletions

Once an item is deleted, it is deleted for good. That is, it is actually deleted from the database.

In this area, the inquiry deletions are similarly to comments, questions and replies item deletions. There are also differences, which are explained here.

Automatic maturity-related deletions.

We want to keep inquiries for a specific amount of time – most likely 21 days (or, maybe only 14 days). Thereafter, we want the application to delete them automatically. The exceptions are the records that are linked. These records deletions are addressed below.

Ideally, we can set this up so, that the number of days that the inquiries are kept before they are deleted can be adjusted from the CMS. That is, ideally there is a user interface, from which this value can be changed.

Please let me know, what do you think of this.

If we do set it up this way, then only the MainAdmin should be able to access this user interface and change the relevant value.

Linked items deletions.

If an item that was submitted more than 21 days ago is linked to another item that was submitted less than 21 days ago, we do not want to delete the item that was submitted more than 21 days ago.

Please let me know, if you have any questions or comments in this area.

Filtering

All secondary filters should be drop-downs of the relevant data. For example, Secondary Item Filters, InquiryID drop-down should contain all the items ItemIDs that are relevant to the currently displayed data. The user can then select an item from the drop-down, and should be able to filter the data accordingly. The same applies to other Secondary Item Filters. (The relevant values can be filtered for each of the Secondary Item Filters drop-downs. They all have their own Primary Keys, that can then be applied as filters.)

Users should be able to apply filters consecutively. That is, before clicking the Apply Filter button, the users should be able make selections from different filter categories, so that they can apply one filter on top of another, in any order.

Good, rsp Gr [1-10] with Parent Items option should display all the unhandled items together with their parent items. For items, that do not have separate parent items, only the item itself should be displayed.

Remove Filter button should remove any filters, display all items and restore the default sorting order.

Please let me know if you have any comments or questions about this.

I will repeat the filtering options below:

List Type Filter (drop-down)

- Items on the No Problem Detected list
- Items on the Quarantined Offensive list
- Items on the Deleted Offensive list

Primary Item Data Filter (drop-down)

- Default processing Yes
- Default processing No
- Alert! Yes
- Alert! No
- Processed Yes
- Processed No
- Resp Yes
- Resp No
- Response posted Yes
- Response posted No

Secondary Item Data Filters

InquiryID (drop-down)

ParentItemID (drop-down)

VisitorID (drop-down)

Username (drop-down)

Admin who processed (drop-down)

Admin who responded (drop-down)

Primary Item Processing Filter (drop-down)

Good, rsp Gr [1-10]

Good, rsp Gr [1-10] with Parent Items

Delete, no response

Delete, rsp Gr [1-10]

Secondary Item Processing Filter

ATo Admin (drop-down)

Apply Filter (button)

Remove Filter (button)

Reply to Inquiry Response

Inquiries and their responses are documented in the visitors profiles.

I would like us to set up visitors profiles so, that the visitors can reply to the responses that administrators have posted. This is further explained in the Visitor Submissions section, Visitor Profile subsection. Briefly, a response simply generates a new inquiry, that is processed similarly to other inquiries. The primary difference is, that the ParentItemID field is filled in by the application.

Navigation

We probably want to put up to 100 items per page. The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.

Unhandled Flagged as Offensive

Handling Flagged as Offensive items is so similar to inquiry handling, that I intend to call these items “Flagged as Offensive inquiries.”

We can actually use precisely the same user interfaces and features for Flagged as Offensive items, that we use for inquiries.

So, I will not repeat the inquiry subsection material here, because we will need precisely the same types of user interfaces and features.

The reason, why I would like to have, if possible, a separate user interface for the Flagged as Offensive inquiries, is that handling of these inquiries will require a few extra steps, that may require more time than the rest of the inquiries do.

Of course, I do not know, how many inquiries of any type there will be at any given point in time. However, I do expect the Flagged as Offensive inquiries to be a rather small percentage of the overall number of inquiries. Because the Flagged as Offensive inquiries will probably take more time to handle (because more steps may be required), I do not want these items to cause a “jam” in the overall stream of inquiries.

Please let me know if you have any questions, comments or suggestions regarding this.

Unhandled Questionnaires

A special note about questionnaires: At the time of writing this text, it has not been decided yet, whether to have questionnaires as part of the application, or to use another, external service for handling the questionnaires and the relevant functionality.

Objectives

As the main website development specs file states, I need to be able to set up and use questionnaires that are accessible only to selected individuals. I plan to use these questionnaires for collecting information from and evaluating potential founding team members, employees, trainees and business partner candidacies.

Further, I would like to have a functionality, that helps to keep track of

- which questionnaires are available,
- to whom their filling invitations have been sent and
- who has or has not yet filled in the questionnaire that was sent to him or her.

Together with the above I need

- information about the new questionnaires that have been completed
- ability to review the questionnaires
- ability to delete questionnaires

Most of the questionnaire-related material is covered in the main website development file. This file does not repeat that material. Below are being addressed only the workload handling related user interfaces.

Unhandled Workload Review

Total items for all Item Types

Item Type: Total items

This data should be presented for all item (questionnaire) types. However, this data should be presented only for these Item Types that have more than 0 (zero) Total items in the unhandled items category.

Total items for all Item Types should be presented even if the grand total is 0 (zero).

Questionnaire Management

Sort By (drop-down)

Select Record (SR)

Item Type

QuestionnaireID (ID)

Username

Completion Date (Cpl Date)

Reviewed (RV)

Review Date (RV Date)

Who Reviewed (Who RV)

Assign To (ATo)

Closed (CL)

Apply Sorting (button)

Default Sorting (button)

Filter For

Item Type (drop-down of questionnaires)

Username

Reviewed Yes

Reviewed No

Who Reviewed

Assign To (drop-down of admins)

Closed Yes

Closed No

Apply Filter (button)

Remove Filter (button)

Select All (button)

Delete Selected Records (button)

Mark Selected as Reviewed (button)

Assign Selected To [Admin drop-down]

Mark Selected as Closed (button)

Mark Selected as Not Closed (button)

| SR | Item Type | ID | Username | Cpl Date | RV | RV Date | Who RV | ATo | CL | Notes |
|--------------------------|-----------|----|----------|----------|--------------------------|---------|--------|-----|--------------------------|-----------------------|
| <input type="checkbox"/> | | | | | <input type="checkbox"/> | | | | <input type="checkbox"/> | Click |

- SR – Stands for Select Record; record-specific buttons functionality applies to the selected records. This field should be enabled.
- Item Type – Questionnaire type, which is also the same as questionnaire name. This field should be disabled (read only).
- ID – QuestionnaireID. Should be a clickable link. When clicked, should open the questionnaire for review. That questionnaire could be formatted similarly to ProjectDeveloper.com submitted inquiry results review page (which is accessible from the search administration center). We can specify the details during the development process.

This field should be disabled (read only).

- Username – Visitor's Username, to whom the record pertains. Here, and everywhere in the CMS, unless specified otherwise, in the workflow management related user interface, Username should be a link to the visitor's full profile.
- Cpl Date – Questionnaire completion date, that is, the date when the questionnaire was marked completed, in mm/dd/yy format.

This field should be disabled (read only).

- RV – Stands for Reviewed, Yes/No column, No by default.

RV field is important, because **unchecked entries identify the unhandled workflow**.

This field should be disabled (read only).

- RV Date and Who RV – RV Date stands for Review Date. Who RV stands for Who Reviewed. These two fields should be disabled (read only) and should be filled in by the application programmatically as is described in the Buttons subsection below.

- ATo – Stands for Assigned To. If the record is assigned to a specific admin, should contain that admin's Username to whom the record is assigned to.

This field should be disabled (read only).

- CL – Stands for Closed. Indicates, whether or not the record is closed. The MgtAdmin or higher admin who reviews the records should close them.

This field should be disabled (read only).

- Notes – a clickable link that opens, ideally, a popup that allows to make notes. 5000 character limit. The same Notes field should be accessible when the filled in questionnaire is being viewed.

Buttons, Sorting and Filtering

Buttons should apply to these fields, that have been selected using the SR field.

All buttons should work with both filtered and unfiltered data.

Each of the button related actions should be preceded with a message and question that allows to proceed or cancel the action – something like “You are about to [action's description]. Do you want to proceed?” Yes No options.

Apply Sorting applies selected sorting, Default Sorting applies default sorting. Essentially the same applies to the filtering buttons.

Select All button checks off the SR column for all the entries displayed on the user interface. Should work together with filters.

Default sorting is: RV (No), Item Type, Cpl Date, Username.

The first of those, RV, stands for Reviewed. That is, primarily we want to sort the data so, that the records that have not been reviewed yet appear on the top of the list.

Item Type and visitors and admins name fields should be sorted alphabetically.

Filtering can be set up so that one filter can be applied at the time.

The subsections below describe button clicking related actions, that help to keep track of who did what and when.

Original Record Processing Button

All admin levels should be able to use the Mark Selected as Reviewed button.

When the Mark Selected as Reviewed button is used, the following should be applied programmatically to the selected records:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

These actions should be applied to the selected records. No new record is created.

Mark Selected as Reviewed button should apply **only to these fields**, that have the RV (Reviewed) field unchecked. All other records should be ignored. That is, we don't want to override any existing data in the RV, RV Date and Who RV fields.

There is no Mark Selected as Not Reviewed button. That is, we don't want to undo any data that is entered in the RV, RV Date and Who RV fields.

New Reviewed Record Creating Buttons

MgtAdmin and higher should be able to use the 2 buttons listed in the table below.

When any of the 2 buttons listed below are used, the original record should be left unchanged. Instead, a new record should be created for every selected record to which the button is applied.

Following buttons should

- Create and insert a copy of the selected record(s), so that for **every new record** the following is applied:
 - Check off the RV field.
 - RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
 - Who RV field should be stamped with that admin's Username who generated the new record (by selecting the original record and clicking the applicable button). As usual, the Username should be a link to that visitor's (admin's) Profile page.
- After applying the above, requery (or refresh) the data displayed through the user interface, by keeping the previously applied filtering and sorting options.

In addition, for **every new record** these buttons should check off, **or** clear, the field that is applicable to the button, as listed below:

| | |
|-----------------------------|------------------------|
| Mark Selected as Closed | Check off the CL field |
| Mark Selected as Not Closed | Clear the CL field |

Original Record Processing and New Record Creating Button

All admin levels should be able to use the Assign Selected To [Admin drop-down] button.

Please note, that on the user interface after this button should be a drop-down of admins. That is, Assign Selected To is a button. [Admin drop-down] is a drop-down that is next to the button.

If an admin clicks the Assign Selected To button without selecting an admin from the drop-down, all the selected records should be assigned to the admin who clicked the Assign Selected To button.

When the Assign Selected To button is used, the following should be applied programmatically to the selected records:

- A new record should be created and inserted for every selected record to which the button is applied, so that for every new record the ATo field is filled in with that admin's Username to whom the record was assigned.

For these **new** records:

- DO NOT check off the RV field.
- DO NOT stamp the RV Date field
- DO NOT stamp the Who RV field

Instead, in the **original** record, the following should be done programmatically:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
- Fill in ATo field with that admin's Username to whom the record was assigned.

These actions should be applied to the selected records.

So, here we mark the original record as Reviewed, and thereby indicate who assigned to another admin (and to whom it was assigned). The new record, that is created, is not marked as Reviewed. Instead, it is only marked in the ATo column with that admin's username to whom it is assigned, so that the other admin can review it and mark it as Reviewed.

Deletions

When the Delete Selected button is clicked, all the data about the questionnaires that are selected using the SR field should be deleted. A confirmation message should precede deletions.

Only MainAdmin can delete the questionnaires. That is, MgtAdmin level users should not be able to delete questionnaires.

Questionnaire Reviewing

From the Questionnaire Management user interface we want to be able to access the individual questionnaire responses one by one, that is, one at the time, by clicking on the ID (QuestionnaireID) field entries.

This Questionnaire Management user interface can in essence be similar to the "View all search pages" in the ProjectDeveloper.com search administration center. The questionnaire responses can be formatted similarly to the inquiry response formatting.

Just in case I will repeat the login information here.

<http://www.projectdeveloper.com/admin/Login.aspx>

Username: ramitpal

Password: ramit126

General Comments

Through the Questionnaire Management user interface the admins should be able to review and work with all the saved questionnaires. So, the same user interface can be used for management of both unhandled and handled questionnaires.

Let's try to put all these columns on one line (row) per record. If we cannot do so, let's try putting them on two lines per record.

MgtAdmin and higher should be able to access and work with the questionnaires. The only exception is the deletions. Only MainAdmin can delete the questionnaires.

Total number of questionnaire types is not fixed. When a new questionnaire is added, it should be manageable through the CMS, too.

Unlike other visitor submissions, we do not filter questionnaires for offensive language. So, we do not have List Types in this area.

Item Types are the questionnaire types.

We do keep track of whether or not the questionnaire was reviewed (one Yes/No field per questionnaire).

We do not keep track or store any responses to the questionnaires.

We need on Notes field per questionnaire that accommodates 5000 characters.

We need one field per questionnaire that enables the admins to assign questionnaires to other admins; same as the field ATo [Admin drop-down].

Just like the rest of the information that pertains to communication with the visitors, we want to record in the visitor's Profile information regarding a visitor submitting and us reviewing a questionnaire. This is further addressed in the Visitors Submissions section.

These are the basic principles. The somewhat more complex parts regarding the questionnaires is described in the main website development specs file. The functionality that is described here should be relatively quick and easy to develop.

We can specify all the details during the development process.

Please let me know what questions, comments and suggestions you have regarding the questionnaires and their administration functionality.

Navigation

We probably should put up to 100 records per page. The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.

Unhandled Profiles

Profile handling is similar to questionnaire handling. The major differences are, that

- profiles are filtered for potentially offensive language, and
- questionnaires cannot be updated once they are closed, but profiles may be updated.

Every time when a visitor clicks the Submit button on his or her profile, we want to filter the text fields for potentially offensive language usage. If any matches to either the Potentially Offensive Terms List or the Offensive Terms List are found, we should display a message regarding it.

However, the visitor's profile should be saved in one way or another.

(Such messages are described in the main website specs file, in subsection Visitor Entry Filtering System.

We need another, slightly differently worded message for the profile filtering purposes. Further, for all such messages, we need a user interface where we can change, if needed, these messages content, too.)

Through the clicks of the Submit button, we should also keep track of all the profile creating and changing instances, and instances when there is a match to either the Potentially Offensive Terms List or the Offensive Terms List. We want to record that data in another table (tblProfileMgt), and to have a user interface for reviewing that data and the relevant profiles.

So, every time a visitor clicks his or her profile's Submit button, that click should also generate a new record in the profile management records table (tblProfileMgt). Using a query which joins that table's content with the table that holds all the profiles, the query's content should be shown, so that it can be worked with, through the Profile Management user interface that is described below.

Every record in table tblProfileMgt belongs into one of the three List Types.

Similarly, every time a profile is deactivated or reactivated, or suspended, there should be a record regarding it in this table tblProfileMgt.

This is relatively easy to do. If you have any questions or comments about this functionality, please let me know.

Most of the profile-related material is covered in the main website development file. This file does not repeat that material. The two user interfaces that are being addressed below, are related to workload handling similarly to the way the questions, comments and replies, inquiries and questionnaires user interfaces are.

Please note that the Profile Management user interface is used for handling all the profiles, including these that are not part of the unhandled workload.

Unhandled Workload Review

Total items for all the List Types

Items on the No Problem Detected list

Items on the Quarantined Offensive list

Items on the Deleted Offensive list

Similarly to the rest of the Unhandled Workload Review user interfaces, this data should be presented for all the unhandled List Types, that is, unhandled profile filtering results types. However, this data should be presented only for these List Types that have more than 0 (zero) items in the unhandled List Type category.

Total items for all the List Types should be presented even if the grand total is 0 (zero).

Profile Management

[_____] Find visitors by VisitorID or Username.

(Comment: we need search functionality here for finding individual visitor's records by matches to VisitorID or Username field entries. All records that are relevant to the VisitorID or Username should be displayed.)

Sort By (drop-down)

Select Record (SR)

VisitorID

Username

Record Date & Time (RecordDT)

List Type (LT)

Deactivated (DA)

Suspended (SU)

Reviewed (RV)

Review Date (RV Date)

Who Reviewed (Who RV)

Assign To (ATo)

Closed (CL)

Apply Sorting (button)

Default Sorting (button)

Filter For

Select Record (SR) Yes

Select Record (SR) No

VisitorID (drop-down)

Username (drop-down)

List Type (LT) 1

List Type (LT) 2

List Type (LT) 3

Deactivated (DA) Yes

Deactivated (DA) No

Suspended (SU) Yes

Suspended (SU) No

Reviewed (RV) Yes

Reviewed (RV) No

Who Reviewed (Who RV) (drop-down)

Assign To (ATo) (drop-down)

Closed (CL) Yes

Closed (CL) No

Apply Filter (button)

Remove Filter (button)

Select All (button)

Delete Selected Records (button)

Mark Selected as Deactivated (button)

Mark Selected as Reactivated (button)

Mark Selected as Suspended (button)

Mark Selected as Not Suspended (button)

Mark Selected as Reviewed (button)

Assign Selected To [Admin drop-down]

Mark Selected as Closed (button)

Mark Selected as Not Closed (button)

Delete Selected Profiles (button)

| SR | VisitorID | Username | RecordDT | LT | DA | SU | RV | RV Date | Who RV | ATo | CL |
|--------------------------|-----------|----------|----------|----|--------------------------|--------------------------|--------------------------|---------|--------|-----|--------------------------|
| <input type="checkbox"/> | | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | <input type="checkbox"/> |

- SR – Stands for Select Record; record-specific buttons functionality applies to the selected records.
This field should be enabled.

- VisitorID – That visitor’s VisitorID, to whom the record pertains.

From Profile Management, VisitorID should be a link to Abuse Control Management user interface. Click on the VisitorID should open the Abuse Control Management user interface so that it is filtered for the specific visitor’s records.

From Abuse Control Management and from everywhere else throughout the CMS, VisitorID should be a link to Profile Management user interface. Click on the VisitorID should open the Profile Management user interface so that it is filtered for the specific visitor’s records.

For navigation purposes, it probably would be preferable, if the specific records related links, that open other parts of CMS, like VisitorID, Username and INQ (inquiry – not part of this user interface) links, open the other part in a new browser instance.

Question: Please let me know, if you have other alternatives to offer for making such workflow related navigation convenient to handle.

If it so happens, that I forget to specify these details for some CMS user interfaces, please ask me about it.

- Username – Visitor’s Username, to whom the record pertains. Here, and everywhere in the CMS, unless specified otherwise, in the workflow management related user interface, Username should be a link to the visitor’s full profile.

If it so happens, that I forget to specify these details for some CMS user interfaces, please ask me about it.

- RecordDT – record creating date and time. If we don’t have enough user interface width and need to make this column narrower, we can place date and time so that they wrap in the relevant cell, or we can place them vertically in every relevant cell:

date (mm/dd/yy)

time (hh:mm:ss)

This field should be disabled (read only).

- LT – Stands for List Type. To save screen space (column width), the results shown here should be numeric, 1, 2 or 3. These numbers stand for the following:

1 – Items on the No Problem Detected list

2 – Items on the Quarantined Offensive list

3 – Items on the Deleted Offensive list

This field should be disabled (read only).

- DA – Stands for Deactivated. Site visitors should be able to deactivate and reactivate their own profiles. Further, MgtAdmin and higher should be able to deactivate and reactivate visitors profiles, as is described in the main website specs file, Profile of [Username] subsection, Deactivating/Reactivating Profiles part. However, admin levels lower than MgtAdmin should not be able to deactivate and reactivate visitor profiles.

I agree with your opinion, that generally speaking, the admins should not be able to deactivate and reactivate visitor profiles. However, we do need a backup functionality for situations, where the visitor wants to, but for some (unforeseen) reasons cannot deactivate or reactivate his or her profile.

This field should be disabled (read only).

- SU – Stands for Suspended. MgtAdmin and higher should be able to suspend profiles and also remove the suspension.
Suspension should work the same way as Deactivation (DA – Deactivated) does, except that it overrides the visitor’s ability to reactivate an account.

That is, when an account is not suspended, a visitor can deactivate and reactivate his or her account.

When an account is suspended, information about it being suspended is shown in the visitor’s profile, and the account behaves precisely as it does when it is deactivated. However, the visitor is not able to reactivate his or her account.

We need the suspension (SU – Suspended) functionality for instances, when a visitor becomes abusive, but we want the comments, questions and/or replies that he or she has submitted to remain on the site. If the visitor then contacts us, and explains the situation so that we can come to some sort of an agreement, we may want to reactivate that visitor’s profile again.

Obviously, these are extreme situations and hopefully, they will not happen at all. **Visitors must be dealt with respect.** However, as we know, there are website visitors who take pleasure in messing with other people’s work and efforts. So, to some degree I want to be prepared for that, too.

Question: Please let me know, what is your opinion of this (the above) approach.

This field should be disabled (read only).

- RV – Stands for Reviewed, Yes/No column, No by default.

RV field is important, because **unchecked entries identify the unhandled workflow.** When a visitor updates his or her profile, a new record should be created in tblProfileMgt, which then should also be

manageable through this Profile Management user interface. That new record should have the RV field unchecked, which allows to identify the (new) unhandled records.

Every other action, taken by an admin, should generate a new record that has the RV field checked, the RV Date field time stamped, and the Who RV field stamped with that admin's Username who generated the record.

This field should be disabled (read only).

- RV Date and Who RV – RV Date stands for Review Date. Who RV stands for Who Reviewed. These two fields should be disabled (read only) and should be filled in by the application programmatically as is described in the Buttons subsection below.
- ATo – Stands for Assigned To. If the record is assigned to a specific admin, should contain that admin's Username to whom the record is assigned to.

This field should be disabled (read only).

- CL – Stands for Closed. Indicates, whether or not the record is closed. The MgtAdmin or higher admin who reviews the records should close them.

This field should be disabled (read only).

Buttons, Sorting and Filtering

Buttons should apply to these fields, that have been selected using the SR field.

All buttons should work with both filtered and unfiltered data.

Each of the button related actions should be preceded with a message and question that allows to proceed or cancel the action – something like “You are about to [action's description]. Do you want to proceed?” Yes No options.

Apply Sorting applies selected sorting, Default Sorting applies default sorting. Essentially the same applies to the filtering buttons.

Select All button checks off the SR column for all the entries displayed on the user interface. Should work together with filters.

Default sorting is: RV (No), VisitorID, RecordDT.

The first of those, RV, stands for Reviewed. That is, primarily we want to sort the data so, that the records that have not been reviewed yet appear on the top of the list.

Username and visitors and admins name fields should be sorted alphabetically.

Filtering can be set up so that one filter can be applied at the time.

The subsections below describe button clicking related actions, that help to keep track of who did what and when.

Original Record Processing Button

All admin levels should be able to use the Mark Selected as Reviewed button.

When the Mark Selected as Reviewed button is used, the following should be applied programmatically to the selected records:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

These actions should be applied to the selected records. No new record is created.

Mark Selected as Reviewed button should apply **only to these fields**, that have the RV (Reviewed) field unchecked. All other records should be ignored. That is, we don't want to override any existing data in the RV, RV Date and Who RV fields.

There is no Mark Selected as Not Reviewed button. That is, we don't want to undo any data that is entered in the RV, RV Date and Who RV fields.

New Reviewed Record Creating Buttons

MgtAdmin and higher should be able to use the 6 buttons listed in the table below.

When any of the 6 buttons listed below are used, the original record should be left unchanged. Instead, a new record should be created for every selected record to which the button is applied.

Following buttons should

- Create and insert a copy of the selected record(s), so that for **every new record** the following is applied:
 - Check off the RV field.
 - RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
 - Who RV field should be stamped with that admin's Username who generated the new record (by selecting the original record and clicking the applicable button). As usual, the Username should be a link to that visitor's (admin's) Profile page.
- After applying the above, requery (or refresh) the data displayed through the user interface, by keeping the previously applied filtering and sorting options.

In addition, for **every new record** these buttons should check off, **or** clear, the field that is applicable to the button, as listed below:

| | |
|--------------------------------|------------------------|
| Mark Selected as Deactivated | Check off the DA field |
| Mark Selected as Reactivated | Clear the DA field |
| Mark Selected as Suspended | Check off the SU field |
| Mark Selected as Not Suspended | Clear the SU field |
| Mark Selected as Closed | Check off the CL field |
| Mark Selected as Not Closed | Clear the CL field |

Original Record Processing and New Record Creating Button

All admin levels should be able to use the Assign Selected To [Admin drop-down] button.

Please note, that on the user interface after this button should be a drop-down of admins. That is, Assign Selected To is a button. [Admin drop-down] is a drop-down that is next to the button.

If an admin clicks the Assign Selected To button without selecting an admin from the drop-down, all the selected records should be assigned to the admin who clicked the Assign Selected To button.

When the Assign Selected To button is used, the following should be applied programmatically to the selected records:

- A new record should be created and inserted for every selected record to which the button is applied, so that for every new record the ATo field is filled in with that admin's Username to whom the record was assigned.

For these **new** records:

- DO NOT check off the RV field.
- DO NOT stamp the RV Date field

- DO NOT stamp the Who RV field

Instead, in the **original** record, the following should be done programmatically:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
- Fill in ATo field with that admin's Username to whom the record was assigned.

These actions should be applied to the selected records.

So, here we mark the original record as Reviewed, and thereby indicate who assigned to another admin (and to whom it was assigned). The new record, that is created, is not marked as Reviewed. Instead, it is only marked in the ATo column with that admin's username to whom it is assigned, so that the other admin can review it and mark it as Reviewed.

Deletions

There are a few complicating factors regarding the profile-related deletions.

- Only MainAdmin can delete the profiles. That is, other admin level users should not be able to delete profiles.

We don't want to delete profiles, unless absolutely necessary.

Hopefully, we can set the site up so, and administer it so, that we do not need – and will not want – to delete very many profiles. Instead, profiles can be deactivated and reactivated as is described in the main website specs file.

- On this mockup I added separate buttons for deletions of individual records, and for deletions of profiles. The idea is to keep the profile deleting related functionality visually separately from the individual records deletion. If you have recommendations for a different setup, please let me know.
- Every profile update should generate its own records, that belongs into one of the three List Type. So, for these visitors who update the profiles several times, we will have several profile related records.
- MgtAdmin and higher can delete individual profile-related records.

However, we should set the individual profile-related records deletions up so, that the profile creating record, which is the very first record regarding the individual profile, cannot be deleted unless the profile itself is deleted. The idea is, that we want to have at least one record per existing profile, which should be the profile creating-related record with its relevant date and time stamp, and we don't want the users to delete accidentally that record.

However, when the profile itself is deleted, we would want to delete all the records that are related to it, including the update-related records.

Please let me know, how do you recommend to set this up. Maybe also using ParentID type of indicators, as is described in the previous subsections?

- A confirmation message should precede deletions.

Profile Reviewing

From the Profile Management user interface we want to be able to access the individual profiles one by one, that is, one at the time, by clicking on the Username field entries.

This Profile Management user interface can in essence be similar to the "View all search pages" in the ProjectDeveloper.com search administration center. The profile responses can be formatted similarly to the inquiry response formatting.

Just in case I will repeat the login information here.

<http://www.projectdeveloper.com/admin/Login.aspx>

Username: ramitpal

Password: ramit126

General Comments

Through the Profile Management user interface the admins should be able to review and work with all the saved profiles. So, the same user interface can be used for management of both unhandled and handled, that is, reviewed and not reviewed profiles.

Let's try to put all these columns on one line (row) per record. If we cannot do so, let's try putting them on two lines per record.

Profile related access and the relevant administration should be set up so, that all admin levels are able to access and review the profiles. The deletions and other buttons usage privileges are addressed separately above.

Total number of visitor profiles is not fixed. That is, visitors can add new profiles any time. When a new profile is added, it should be manageable through the CMS, too.

Profile updating and review management related information should not appear in the visitors profiles.

These are the basic principles. The somewhat more complex parts regarding the profiles is described in the main website development specs file. The functionality that is described here should be relatively quick and easy to develop.

We can specify all the details during the development process.

Please let me know what questions, comments and suggestions you have regarding the profiles and their administration functionality.

Navigation

We probably should put up to 100 records per page. The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.

Unhandled Live Chat Transcripts

Live Chat transcript handling is similar to questionnaire handling. Live Chat transcripts are not visitor submissions and, thus, are not filtered for language usage.

The difference is, that visitors can obtain copies of their own Live Chat transcripts within 24 hours after the Live Chat instance. So, we don't want to delete any transcripts sooner than 24 hours after the Live Chat instance. We may store some transcripts for a longer period of time.

Most of the Live Chat-related material is covered in the main website development file. This file does not repeat that material. Below are being addressed only the workload handling related user interfaces.

Objectives

The objective is to give the admins an opportunity to review transcripts and decide, if the transcript contains questions, thoughts, comments or other type of information that can be used for posts, for example. User feedback, including live chat discussions, can be a great source for posts.

As we discussed, we should have a simple flagging systems, that allows Live Chat operators to flag transcripts that may contain potentially useful information.

Whatever doesn't have to be stored, will be deleted.

Unhandled Workload Review

Total items

Just like in the rest of the similar user interfaces, this data should be presented for the unhandled workload, that is, for all the transcripts that have not been marked as Reviewed.

Total items should be presented even if the total is 0 (zero).

Transcript Management

Sort By (drop-down)

Select Record (SR)

TranscriptID (ID)

VisitorID

Username

Completion date, time (ChatDT)

Reviewed (RV)

Review Date (RV Date)

Who Reviewed (Who RV)

Assign To (ATo)

Closed (CL)

Apply Sorting (button)

Default Sorting (button)

Filter For

VisitorID

Username

Reviewed Yes

Reviewed No

Who Reviewed

Assign To (drop-down of admins)

Closed Yes

Closed No

Apply Filter (button)

Remove Filter (button)

Select All (button)

Delete Selected Records (button)

Mark Selected as Reviewed (button)

Assign Selected To [Admin drop-down]

Mark Selected as Closed (button)

Mark Selected as Not Closed (button)

| SR | ID | VisitorID | Username | ChatDT | RV | RV Date | Who RV | ATo | CL | Notes |
|--------------------------|----|-----------|----------|--------|--------------------------|---------|--------|-----|--------------------------|-----------------------|
| <input type="checkbox"/> | | | | | <input type="checkbox"/> | | | | <input type="checkbox"/> | Click |

- SR – Stands for Select Record; record-specific buttons functionality applies to the selected records.
This field should be enabled.
- ID – TranscriptID. Should be a clickable link. When clicked, should open the transcript for review. We can specify the details during the development process.
- VisitorID – That visitor's VisitorID, to whom the record pertains. Should be a link to Profile Management user interface. Click on the VisitorID should open the Profile Management user interface so that it is filtered for the specific visitor's records.
- Username – Visitor's Username, to whom the record pertains. Here, and everywhere in the CMS, unless specified otherwise, in the workflow management related user interface, Username should be a link to the visitor's full profile.
- ChatDT – Chat instance completion (end) date and time. If we don't have enough user interface width and need to make this column narrower, we can place date and time so that they wrap in the relevant cell, or we can place them vertically in every relevant cell:
date (mm/dd/yy)

time (hh:mm:ss)

This field should be disabled (read only).

- RV – Stands for Reviewed, Yes/No column, No by default.

RV field is important, because **unchecked entries identify the unhandled workflow**.

This field should be disabled (read only).

- RV Date and Who RV – RV Date stands for Review Date. Who RV stands for Who Reviewed. These two fields should be disabled (read only) and should be filled in by the application programmatically as is described in the Buttons subsection below.

- ATo – Stands for Assigned To. If the record is assigned to a specific admin, should contain that admin's Username to whom the record is assigned to.

This field should be disabled (read only).

- CL – Stands for Closed. Indicates, whether or not the record is closed. The MgtAdmin or higher admin who reviews the records should close them.

This field should be disabled (read only).

- Notes – a clickable link that opens, ideally, a popup that allows to make notes. 5000 character limit.

Buttons, Sorting and Filtering

Buttons should apply to these fields, that have been selected using the SR field.

All buttons should work with both filtered and unfiltered data.

Each of the button related actions should be preceded with a message and question that allows to proceed or cancel the action – something like “You are about to [action's description]. Do you want to proceed?” Yes No options.

Apply Sorting applies selected sorting, Default Sorting applies default sorting. Essentially the same applies to the filtering buttons.

Select All button checks off the SR column for all the entries displayed on the user interface. Should work together with filters.

Default sorting is: RV (No), ChatDT, VisitorID

The first of those, RV, stands for Reviewed. That is, primarily we want to sort the data so, that the records that have not been reviewed yet appear on the top of the list.

Username field should be sorted alphabetically.

Filtering can be set up so that one filter can be applied at the time.

The subsections below describe button clicking related actions, that help to keep track of who did what and when.

Original Record Processing Button

All admin levels should be able to use the Mark Selected as Reviewed button.

When the Mark Selected as Reviewed button is used, the following should be applied programmatically to the selected records:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

These actions should be applied to the selected records. No new record is created.

Mark Selected as Reviewed button should apply **only to these fields**, that have the RV (Reviewed) field unchecked. All other records should be ignored. That is, we don't want to override any existing data in the RV, RV Date and Who RV fields.

There is no Mark Selected as Not Reviewed button. That is, we don't want to undo any data that is entered in the RV, RV Date and Who RV fields.

New Reviewed Record Creating Buttons

MgtAdmin and higher should be able to use the 2 buttons listed in the table below.

When any of the 2 buttons listed below are used, the original record should be left unchanged. Instead, a new record should be created for every selected record to which the button is applied.

Following buttons should

- Create and insert a copy of the selected record(s), so that for **every new record** the following is applied:
 - Check off the RV field.
 - RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
 - Who RV field should be stamped with that admin's Username who generated the new record (by selecting the original record and clicking the applicable button). As usual, the Username should be a link to that visitor's (admin's) Profile page.
- After applying the above, requery (or refresh) the data displayed through the user interface, by keeping the previously applied filtering and sorting options.

In addition, for **every new record** these buttons should check off, **or** clear, the field that is applicable to the button, as listed below:

| | |
|-----------------------------|------------------------|
| Mark Selected as Closed | Check off the CL field |
| Mark Selected as Not Closed | Clear the CL field |

Original Record Processing and New Record Creating Button

All admin levels should be able to use the Assign Selected To [Admin drop-down] button.

Please note, that on the user interface after this button should be a drop-down of admins. That is, Assign Selected To is a button. [Admin drop-down] is a drop-down that is next to the button.

If an admin clicks the Assign Selected To button without selecting an admin from the drop-down, all the selected records should be assigned to the admin who clicked the Assign Selected To button.

When the Assign Selected To button is used, the following should be applied programmatically to the selected records:

- A new record should be created and inserted for every selected record to which the button is applied, so that for every new record the ATo field is filled in with that admin's Username to whom the record was assigned.

For these **new** records:

- DO NOT check off the RV field.
- DO NOT stamp the RV Date field
- DO NOT stamp the Who RV field

Instead, in the **original** record, the following should be done programmatically:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

- Fill in ATo filed with that admin's Username to whom the record was assigned.

These actions should be applied to the selected records.

So, here we mark the original record as Reviewed, and thereby indicate who assigned to another admin (and to whom it was assigned). The new record, that is created, is not marked as Reviewed. Instead, it is only marked in the ATo column with that admin's username to whom it is assigned, so that the other admin can review it and mark it as Reviewed.

Deletions

We need to set up the deletions so, that transcripts cannot be deleted sooner than 24 hours after completion of the Live Chat instance.

When the Delete Selected button is clicked, all the data about the transcripts that are selected using the SR field, that are older than 24 hours, should be deleted. A confirmation message should precede deletions.

MgtAdmin and higher should be able to delete transcripts.

Transcript Reviewing

From the Transcript Management user interface we want to be able to access the individual transcript responses one by one, that is, one at the time, by clicking on the ID (TranscriptID) field entries.

General Comments

Through the Transcript Management user interface the admins should be able to review and work with all the saved transcripts. So, the same user interface can be used for management of both unhandled and handled transcripts.

Let's try to put all these columns on one line (row) per record. If we cannot do so, let's try putting them on two lines per record.

MgtAdmin and higher should be able to access and work with the transcripts.

Transcripts are not visitor submissions and, therefore, are not filtered for offensive language. So, we do not have List Types in this area, and we do not have Item Types either.

We do keep track of whether or not the transcript was reviewed (one Yes/No field per transcript).

We need on Notes field per transcript that accommodates 5000 characters.

We need one field per transcript that enables the admins to assign transcripts to other admins; same as the field ATo [Admin drop-down].

These are the basic principles. The somewhat more complex parts regarding the Live Chat functionality is described in the main website development specs file. The functionality that is described here should be relatively quick and easy to develop.

We can specify all the details during the development process.

Please let me know what questions, comments and suggestions you have regarding the transcripts and their administration functionality.

Navigation

We probably should put up to 100 records per page. The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.

Unhandled Abuse Control System Related Items

Objectives

As is stated in the main website Abuse Control System section, we need functionality, a system, that prevents site visitors from abusing *any type of functionality* where the visitors interact with the application and either receive information from the application or submit information to the application.

The objective is to prevent instances where the visitors either

- 1) abuse server resources – for example, by clicking repeatedly on a link or a button that triggers server responses, or
- 2) intentionally and abusively behave in a manner that create additional work for the admins – for example, by submitting many meaningless inquiries in a short period of time either manually or programmatically.

Item Types are in this case Abuse Types. In addition, we have Abuse Levels as qualitative indicators.

Please note that the Abuse Control Management user interface is used for handling all the Abuse Control records, including these that are not part of the unhandled workload.

Unhandled Workload Review

Total items for all Item Types

Item Type

Total items

Abuse Level 1 Items

Abuse Level 2 Items

Abuse Level 3 Items

This data should be presented for all item (abuse) types. However, this data should be presented only for these Item Types that have more than 0 (zero) Total items in the unhandled items category. To put it differently, we do not need to list under the Unhandled Workload Review user interface different Item Types that do not have any unhandled workload items.

Total items for all Item Types should be presented even if the grand total is 0 (zero).

Abuse Control Management

Sort By (drop-down)

Select Record (SR)

VisitorID

Username

Record Date & Time (RecordDT)

Abuse Type (AT)

Abuse Level (AL)

Inquiry (INQ)

Reviewed (RV)

Review Date (RV Date)

Who Reviewed (Who RV)

Assign To (ATo)

Closed (CL)

Apply Sorting (button)

Default Sorting (button)

Filter For

Select Record (SR) Yes

Select Record (SR) No

VisitorID (drop-down)

Username (drop-down)

Abuse Type (LT) 1

Abuse Type (LT) 2

Abuse Type (LT) 3

Inquiry (INQ) Yes

Inquiry (INQ) No

Reviewed (RV) Yes

Reviewed (RV) No

Who Reviewed (Who RV) (drop-down)

Assign To (ATo) (drop-down)

Closed (CL) Yes

Closed (CL) No

Apply Filter (button)

Remove Filter (button)

Select All (button)

Delete Selected Records (button)

Mark Selected as Reviewed (button)

Assign Selected To [Admin drop-down]

Mark Selected as Closed (button)

Mark Selected as Not Closed (button)

| SR | VisitorID | Username | RecordDT | AT | AL | INQ | RV | RV Date | Who RV | ATo | CL |
|--------------------------|-----------|----------|----------|----|----|------------|--------------------------|---------|--------|-----|--------------------------|
| <input type="checkbox"/> | | | | | | <u>Yes</u> | <input type="checkbox"/> | | | | <input type="checkbox"/> |
| <input type="checkbox"/> | | | | | | No | <input type="checkbox"/> | | | | <input type="checkbox"/> |

- SR – Stands for Select Record; record-specific buttons functionality applies to the selected records.
This field should be enabled.
- VisitorID – That visitor’s VisitorID, to whom the record pertains.
From Abuse Control Management and from everywhere else throughout the CMS, VisitorID should be a link to Profile Management user interface. Click on the VisitorID should open the Profile Management user interface so that it is filtered for the specific visitor’s records.
- Username – Visitor’s Username, to whom the record pertains. Here, and everywhere in the CMS, unless specified otherwise, in the workflow management related user interface, Username should be a link to the visitor’s full profile.
- RecordDT – record creating date and time. If we don’t have enough user interface width and need to make this column narrower, we can place date and time so that they wrap in the relevant cell, or we can place them vertically in every relevant cell:
date (mm/dd/yy)
time (hh:mm:ss)
This field should be disabled (read only).
- AT – Stands for Abuse Type. We want numeric entries here (to save column width). These numeric entries should correspond to the Abuse Types that we will agree on and will be tested for.
This field should be disabled (read only).
- AL – Stands for Abuse Level. We want numeric entries here (to save column width). Response1 has 3 (three) Abuse Levels. The third one means that the account is suspended.
After this Abuse Control Management subsection I am including a copy of the rewritten main website specs file section Abuse Control System. That section provides more information on Abuse Levels.
This field should be disabled (read only).
- INQ – Stands for Inquiry. If the visitor provided an explanation when the application prompted the visitor to do so, that explanation will be treated just like the inquiries are, that is, it should be processed through the same table and user interface structure.
If an inquiry is available for the record, there should be a clickable, bolded Yes for the record in the INQ field. A click on that field’s Yes link should open the user interface that is used for handling inquiries (Unhandled Workload Management part), in a new browser instance and so, that the inquiry user interface is filtered for the specific, relevant inquiry.
If the visitor did not submit an explanation (for example, simply closed the explanation writing user interface that popped up, without writing anything), and an inquiry is not available for the record, there should be a non-clickable, not bolded No for the record in the INQ field.
- RV – Stands for Reviewed, Yes/No column, No by default.
RV field is important, because **unchecked entries identify the unhandled workflow**.
This field should be disabled (read only).
- RV Date and Who RV – RV Date stands for Review Date. Who RV stands for Who Reviewed. These two fields should be disabled (read only) and should be filled in by the application programmatically as is described in the Buttons subsection below.

- ATo – Stands for Assigned To. If the record is assigned to a specific admin, should contain that admin's Username to whom the record is assigned to.
This field should be disabled (read only).
- CL – Stands for Closed. Indicates, whether or not the record is closed. The MgtAdmin or higher admin who reviews the records should close them.
This field should be disabled (read only).

Table Setup

We probably want to set up the Abuse Control Management so that we use two tables for the record keeping: One, that stores visitors Abuse Control Management data while they are logged in, and the second, that holds the history of Abuse Control Management records.

- Current Abuse Recording table for keeping track of the abuse instances that are related to the currently logged in visitors – let's call it tblAbuseCurrentRec.
- Abuse History Records table, where we collect abuse instance related data – let's call it tblAbuseHistoryRec.

When a visitor logs off and has generated any Abuse Control Management related records when he or she was logged in, these records should be transferred from tblAbuseCurrentRec to tblAbuseHistoryRec. Thereafter, the relevant records should be deleted from tblAbuseCurrentRec.

The challenge here is to make sure, that the records are transferred regardless how the visitor logs off – either legitimately logs off, simply closes the browser, turns off the computer by crashing the browser instance, or if the visitor's computer freezes or anything else happens that disables the visitor's ability to continue using the CreativityModel.com application.

tblAbuseHistoryRec should be the main base table for the Abuse Control Management user interface.

This helps us to keep currently logged in visitors related tblAbuseCurrentRec relatively small, and the application running faster. Further, such a system is not difficult to develop.

Additional tables are probably needed as well (and are not being addressed here). I'm addressing only this two table idea here, in order to get your feedback and opinion on this.

Please let me know if you have any questions, comments or suggestions regarding this.

Buttons, Sorting and Filtering

Buttons should apply to these fields, that have been selected using the SR field.

All buttons should work with both filtered and unfiltered data.

Each of the button related actions should be preceded with a message and question that allows to proceed or cancel the action – something like “You are about to [action's description]. Do you want to proceed?” Yes No options.

Apply Sorting applies selected sorting, Default Sorting applies default sorting. Essentially the same applies to the filtering buttons.

Select All button checks off the SR column for all the entries displayed on the user interface. Should work together with filters.

Default sorting is: RV (No), VisitorID, RecordDT.

The first of those, RV, stands for Reviewed. That is, primarily we want to sort the data so, that the records that have not been reviewed yet appear on the top of the list.

Username and visitors and admins name fields should be sorted alphabetically.

Filtering can be set up so that one filter can be applied at the time.

The subsections below describe button clicking related actions, that help to keep track of who did what and when.

Original Record Processing Button

All admin levels should be able to use the Mark Selected as Reviewed button.

When the Mark Selected as Reviewed button is used, the following should be applied programmatically to the selected records:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.

These actions should be applied to the selected records. No new record is created.

Mark Selected as Reviewed button should apply **only to these fields**, that have the RV (Reviewed) field unchecked. All other records should be ignored. That is, we don't want to override any existing data in the RV, RV Date and Who RV fields.

There is no Mark Selected as Not Reviewed button. That is, we don't want to undo any data that is entered in the RV, RV Date and Who RV fields.

New Reviewed Record Creating Buttons

MgtAdmin and higher should be able to use the 2 buttons listed in the table below.

When any of the 2 buttons listed below are used, the original record should be left unchanged. Instead, a new record should be created for every selected record to which the button is applied.

Following buttons should

- Create and insert a copy of the selected record(s), so that for **every new record** the following is applied:
 - Check off the RV field.
 - RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
 - Who RV field should be stamped with that admin's Username who generated the new record (by selecting the original record and clicking the applicable button). As usual, the Username should be a link to that visitor's (admin's) Profile page.
- After applying the above, requery (or refresh) the data displayed through the user interface, by keeping the previously applied filtering and sorting options.

In addition, for **every new record** these buttons should check off, **or** clear, the field that is applicable to the button, as listed below:

| | |
|-----------------------------|------------------------|
| Mark Selected as Closed | Check off the CL field |
| Mark Selected as Not Closed | Clear the CL field |

Original Record Processing and New Record Creating Button

All admin levels should be able to use the Assign Selected To [Admin drop-down] button.

Please note, that on the user interface after this button should be a drop-down of admins. That is, Assign Selected To is a button. [Admin drop-down] is a drop-down that is next to the button.

If an admin clicks the Assign Selected To button without selecting an admin from the drop-down, all the selected records should be assigned to the admin who clicked the Assign Selected To button.

When the Assign Selected To button is used, the following should be applied programmatically to the selected records:

- A new record should be created and inserted for every selected record to which the button is applied, so that for every new record the ATo field is filled in with that admin's Username to whom the record was assigned.

For these **new** records:

- DO NOT check off the RV field.
- DO NOT stamp the RV Date field
- DO NOT stamp the Who RV field

Instead, in the **original** record, the following should be done programmatically:

- Check off the RV field.
- RV Date field should be time stamped in the mm/dd/yy format (EST – US Eastern Standard Time).
- Who RV field should be stamped with that admin's Username who clicked the button. As usual, the Username should be a link to that visitor's (admin's) Profile page.
- Fill in ATo field with that admin's Username to whom the record was assigned.

These actions should be applied to the selected records.

So, here we mark the original record as Reviewed, and thereby indicate who assigned to another admin (and to whom it was assigned). The new record, that is created, is not marked as Reviewed. Instead, it is only marked in the ATo column with that admin's username to whom it is assigned, so that the other admin can review it and mark it as Reviewed.

Deletions

MgtAdmin and higher can use the Delete Selected Records button to delete records.

Navigation

We probably should put up to 100 records per page. The navigation system should function similarly to mockup page 2 blogging functionality related navigation system.

Previous Workload Review and Handling

Page Edit

Functionality Explanation

CreativityModel.com site will contain informative-educational content. Our objective will be to put together increasing useful content for the new visitors through content editing. In order to do that, we will modify existing posts and over time we will delete some of the submitted questions, comments and replies, in addition to adding new ones.

Most of CMS functionality is intended for working with individual items separately, or in groups. In addition, we will need special type of Page Edit functionality, where the admin can work with the entire blogging page, so that the admin can modify the post, and can add and delete questions, comments and replies.

User Interface Setup

Page Edit functionality pages should look like the regular blogging pages do, so that they contain the already posted material (post, questions, comments and replies). These pages should have the navigation menus, but they do not need any ads.

MgtAdmin or higher should be able to use the Page Edit functionality.

Through Page Edit we should be able to add questions, comments and replies similarly to the way they can be added through the regular main website usage processes, with one important difference. Through the Page Edit functionality, admins should be able to edit posts, delete and add questions, comments and replies directly and the webpage, without using any CMS approval tools.

The rest of the page functionality can be the same that the regular pages have, with the following differences:

- Post does not need the Add to RL | Add to CP | (?) functionalities.
- Post should have Edit functionality, that allows to edit the post as needed. Please note that the same formatting functionalities are needed here that other functionality parts have that are built for working with posts.
- Questions, comments and replies do not need the Flag functionality.
- Each question, comment and reply needs Mark for Deletion functionality, that allows to mark the selected individual item for deletion.

In addition, we need Process Deletions button, that deletes these items that have been marked for deletion.

(We do not edit existing questions, comments and replies, but we should be able to replace them as needed by adding new, more informative or educational items, and then deleting the existing items.)

Page Edit instances contain already approved and posted material. The rest of the CMS functionality deals with new material. So, there should not be any conflict between using Page Edit functionality and the rest of the CMS functionality.

Adding the Page Edit functionality should be doable, because all the pages bring together their content based on the IDs of the individual items on the page, just like the regular blogging pages do.

Robots should not be able to access the Page Edit functionality, because otherwise they may create duplicate text for indexing purposes.

Deleted Items Messages

We want to set the functionality up so, that when items are deleted through Page Edit, every deletion generates an automatic Admin's message that is posted in the visitor's Interaction History. In every such message can be the same pre-set text, which explains that we delete certain posted comments, questions and replies, and consolidate text through submitting new explanatory comments, so that the end results can provide more value to the visitors as informative and educational content.

Record Keeping

Additionally, we need to keep track of who uses the Page Edit functionality – what URL (page) was accessed through Page Edit, by whom and when. We don't need more detailed record keeping, because the more detailed record keeping would probably be too complicated to develop.

Reordering of Comments and Questions

We also need functionality that allows to re-order the displayed comments and questions. This means that we need either an additional table or a field with integer numbers, so that we can use this field for the sorting purposes under individual posts. On the administrative user interface level, this part of the site functionality should allow people who are allowed to administer the site to re-order the comments and questions that the site visitors have submitted.

Please note, that every comment and question should be re-ordered so, that any replies related to it move with the comment or question as a unit. To put it differently, the relevant functionality should be set up so that replies cannot be accidentally separated from their original questions or comments.

Additional Content Management

Miscellaneous Administrative User Interfaces

We need miscellaneous administrative user interfaces for working with different parts of the website. For example, we need user interfaces for working with offensive terms.

Similarly, we need user interfaces for modifying popups content.

Other similar user interfaces are needed as well.

For the most part, the needed functionality is rather simple. However, for the development purposes it means, that pretty much every message that the application displays, automatically posts or sends out, should be set up so, that instead of being hard-coded, the message's content should be drawn from the relevant table, which is set up so, that we can modify the message's content.

The same applies to most drop-downs, labels and captions that appear on the website – we should be able to change the content of the drop-downs, labels and captions.

We want to keep this functionality as consistent as possible.

MgtAdmin and higher should be able to work with the relevant entries.

We probably should specify such details during the development.

Visitors Activities

Visitor activities are visitor actions, that trigger CreativityModel.com website's functionality. CreativityModel.com Version 1 deals with a limited range of visitors activities. For example, Abuse Control System is related to visitors activities. This functionality part is addressed in the Administrators Activities section.

For CreativityModel.com Version 1, we do not have any user interfaces in this section.

Visitors Submissions

Both visitors activities and submissions (primarily questions, comments, replies and inquiries) create activities for the administrators, thus forming workflow spirals.

Most of the visitor submissions related material is addressed in other sections – primarily in the Administrators Activities section. There is only one user interface that is addressed in this section: a partial description of the Registration and Profile Changing page.

The Registration and Profile Changing page and its features are described in the main website development specs file. We probably want to set up the Registration and Profile Changing page so, that the visitors can use the same page for both registering and for making changes to their profile.

Just in case I will also add here, that the Profile of [Username] page is a different page. The latter contains a list of default information about the visitor, plus the information that the visitor has approved for his or her public profile. The main website specs file has more information on the Profile of [Username] page.

The Registration and Profile Changing page should probably contain several sections. On the top of the page we probably want to have a Contents section, which displays links to the subsections that are on the same page. These links should probably be

- Registration and Profile Changing Form's Usage Information
- Registration and Profile Changing Form
- My Interaction History

The Registration and Profile Changing Form's Usage Information is the informative part that is listed in the main website specs file and precedes the Registration and Profile Changing Form fields mockup.

The last of the three, My Interaction History, is described below.

My Interaction History

Overview

My Interaction History is intended to be a section on the Registration and Profile Changing page that opens from the main website. The Registration and Profile Changing page is, in a way, something like a "content management system" for the website visitors. Of course, compared to the actual CMS that the admins use, the Registration and Profile Changing page contains a very small range of features and functionality.

My Interaction History section should contain history of instances when the visitor submitted items – primarily questions, comments, replies or inquiries, and also questionnaires. This includes Flagged as Offensive entries and Abuse Control System related issues, both of which are treated as inquiries.

What and Why Is Needed

Admins should be able to communicate with the visitors regarding visitor activity related problem solving instances. This communication should take place through the My Interaction History section.

Further, having the My Interaction History section is also a matter of courtesy. We don't want visitors to wonder, what happened to the items they submitted while these items are being reviewed. Instead, we want them to have information regarding their interactions with the website.

However, we do not want to store that information forever either. We probably want to set either 14 or 21 day limit for storing this information, and to set the My Interaction History section entries up so, that the records are deleted automatically after the deadline. The reason for this is simple – we do not want to keep an ever growing number of records (for a growing number of visitors) that consumes server space that we have to pay for. In my opinion, there is no reason important enough to do so.

So, for this we do need a scheduler.

However, just like with the inquiries, ideally we can set this scheduler-based automatic deletion process up so, that linked items are not deleted, if part of the link is less than 21 days old.

Below is a mockup example of some of the data that the My Interaction History section should contain.

My Interaction History

From your Interaction History you can see, when you submitted questions, comments and replies, and when the submitted items are posted on the website.

Responses to your inquiries, and messages from other visitors and from website administrators are also accessible through this user interface. Further, you can respond to these messages from here as well.

You can also download your Live Chat transcript from here. Access to the transcript is available for 24 hours after the completion of Live Chat with an operator.

You can sort and view the records in different ways, using the drop-down below the records. The “Group relevant items together” option shows you together your submitted items and their posting dates or their responses.

Your Interaction History records are kept for 21 days and are automatically deleted thereafter.

Sort By [drop-down]

| When? | Item's Description | Submitted By | Review |
|-------------------|---|--------------------------|--------------------------|
| mm/dd/yy hh:mm:ss | Admin's message | Username | Review |
| mm/dd/yy hh:mm:ss | Account suspension removed | Username | N/A |
| mm/dd/yy hh:mm:ss | Third potentially offensive language warning – you did not submit a response. Account suspension | Application | N/A |
| mm/dd/yy hh:mm:ss | Second potentially offensive language warning – you did submit a response. | Application | Review |
| mm/dd/yy hh:mm:ss | Potentially offensive language warning | Application | N/A |
| mm/dd/yy hh:mm:ss | Your comment PostID45 | You | Review |
| mm/dd/yy hh:mm:ss | Your Live Chat transcript | Application | Download |
| mm/dd/yy hh:mm:ss | Your profile update | You | N/A |

| | | | |
|-------------------|-------------------------------------|--------------------------|------------------------|
| mm/dd/yy hh:mm:ss | You reactivated your profile | You | N/A |
| mm/dd/yy hh:mm:ss | You deactivated your profile | You | N/A |
| mm/dd/yy hh:mm:ss | Admin posted your reply PostID45 | Username | Review |
| mm/dd/yy hh:mm:ss | Your reply PostID45 | You | Review |
| mm/dd/yy hh:mm:ss | Visitor's message | Username | Review |
| mm/dd/yy hh:mm:ss | Admin's message | Username | Review |
| mm/dd/yy hh:mm:ss | Your response to inquiry | You | Review |
| mm/dd/yy hh:mm:ss | Admin's response to inquiry | Username | Review |
| mm/dd/yy hh:mm:ss | Your inquiry | You | Review |
| mm/dd/yy hh:mm:ss | Admin posted your question PostID45 | Username | Review |
| mm/dd/yy hh:mm:ss | Your question PostID45 | You | Review |

Sort By [drop-down]

The Sort By drop-down should contain the following entries

- When? column descendingly
- When? column ascendingly
- Item's Description column
- Submitted By column
- Group relevant items together descendingly
- Group relevant items together ascendingly

By default, every time a visitor opens the user interface, the records should be sorted by the When? column descendingly, so that the latest records appear on the top of the list.

Items in the My Interaction History user interface should be sorted when the visitor selects an entry from the Sort By drop-down.

The "Group relevant items together" option should group together the submitted items and their posting records or their responses. The items in the above mockup are shown this way.

For this sorting option we probably need to develop a ParentItemID-like system, so that the values that are in the specially designated ParentItemID column keep relevant entries together. That is, the relevant records have the same values in the ParentItemID column. When the records are sorted by (1) ParentItemID and (2) When? column, the records will be in the needed order. This isn't very difficult to do either.

Features and Functionality

Every Action Creates a New Record

Just like in many parts of the CMS that admins use, in My Interaction History we want every action to create a new record.

For example, when a visitor submits a comment, a record is created in his or her Interaction History.

When an admin posts that comment, a record is created in that visitor's Interaction History.

Username Are Posted When Possible

When a record is created that is related to a username other than the visitor's own username, that username should be posted in the Submitted By column. Here, and everywhere else when website visitors click the Username link, the clickable Username link should be a link to the relevant visitor's **public** profile. In the CMS that the admins use, the Username should be a link that the relevant visitor's full profile.

Columns

When? Column

This column contains the record creating date and time.

Item's Description Column

Caption for the item. Each record type has its own caption type. For each record type, during the development we will have to list and agree on the caption types.

Ideally, we will have another user interface where we can modify the relevant captions that the application uses automatically.

Submitted By Column

This column can have 3 types of entries:

- You, which means the visitor. This entry is not a clickable link.
- Application, which not a clickable link.
- Username, which should be a clickable link.

Review Column

This column can have 5 types of entries:

- N/A, which is not a clickable link.
- Download, which should be a clickable link that downloads the Live Chat transcript in the format that we will agree on (most likely we will choose the txt file format).
- Review, which should be a clickable link. There can be three types of Review links:
 - Anything that the visitor submitted and we store, should open a simple user interface with the relevant text and a Close button.
 - Admin posted [item's type and PostID] Review link should open the website, so that the visitor is scrolled to the relevant item.
 - A message from an admin or from another visitor should open a simple popup with the message, and with two buttons: Close and Respond. The Respond button should open another user interface that we will discuss during the development. That other user interface can be very simple; it can be the same that the visitors use for sending messages to each other, or it can be the inquiry sending user interface. All messages sent through that user interface should be treated as inquiries.

Deleted Items Messages

We want to set the functionality up so, that when items are deleted through Page Edit, every deletion generates an automatic Admin's message that is posted in the visitor's Interaction History. Again, this is a matter of courtesy. In every such message can be the same pre-set text, which explains that we delete certain posted comments, questions and replies, and consolidate text through submitting new explanatory comments, so that the end results can provide more value to the visitors as informative and educational content.

Navigation

We probably should put up to 100 records per page. The navigation system should function similarly to mockup Page 2 blogging functionality related navigation system.