Project Deliverable Report

Deliverable nr D4.5 – Design Document v3

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Abstract (for dissemination)	The third version of the design document for the IdSpace platform.
Keywords List	System Design Document

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1   Summary

Following the delivery and evaluation of version 2 of the idSpace platform, version 3 was intended to provide improvements over version two.

The evaluation results were taken into account in formulating the requirements as well as in prioritizing them.

The design of version 3 was done using a cyclical approach. During the entire development process, new requirements could be included when a partner asked for it. That request was then extended with comment from WP4 on technical and functional achievability. The cyclical process was managed by a technical committee consisting of representatives from WPs 4 and 5.

All high priority issues that arose from the evaluation were scheduled for implementation.

The requirements mainly involved:

- redesigning the Ideation screen
- enhancing the GUI
- improving the Context Awareness component
- adding more support for users and the moderator.

2 Introduction

2.1 Purpose of this Document

The purpose of this document is to define the requirements for version 3 of the idSpace platform. The core of version 2 of the platform will remain intact. The changes described in this document are only focused on improving the GUI and on implementing a few new functions.

This means that the architecture of the platform will remain as it is. The same can be said about the process. This will be unchanged in comparison to version 2 of the platform. For more information on the architecture and the process, please refer to D4.3.

The issues that arose during the evaluation sessions and which were communicated to WP4 are translated into new requirements.

2.2 About this document

In chapter 2 we will describe the design process for version 3 of the platform. In chapter 3 we will describe the design decision about the ideation screen. Chapter 4 describes the requirements for version 3. The requirements will also be discussed in relation to the findings of the evaluation process. Chapter 5 provides an activity log of the design and development process of version 3. Chapter 6 lists the requirements that have been implemented.

3 The Design Process for version 3

3.1 Background

Since the delivery of version 2 of the idSpace platform was delayed by two months, the evaluation by WP5 was also delayed. Because D4.5 had to be made before the evaluation results would become available, the consortium chose a different approach for the design of v3.

3.2 Using RAD and the Role of the Design Document

For D4.5 the consortium chose to use the RAD-approach. This means that the design document has to be a dynamic document, which can be adapted even after the development of the platform has started.

Figure 1 shows the process as intended for the development of version 3 of the platform. D4.4 was the starting point in terms of functionality. Then, in December 2009, a cycle started with defining new functionality, prioritizing the list of functionalities and developing version 3 of the platform. During the following months, until the end of the project, the consortium members can look at the platform and assess whether new functionality is required.

At the end of the project the platform will be finalized and the code is frozen as D4.6. Any functionality defined in this document but not implemented in version 3 of the platform, is made available for people outside the project.
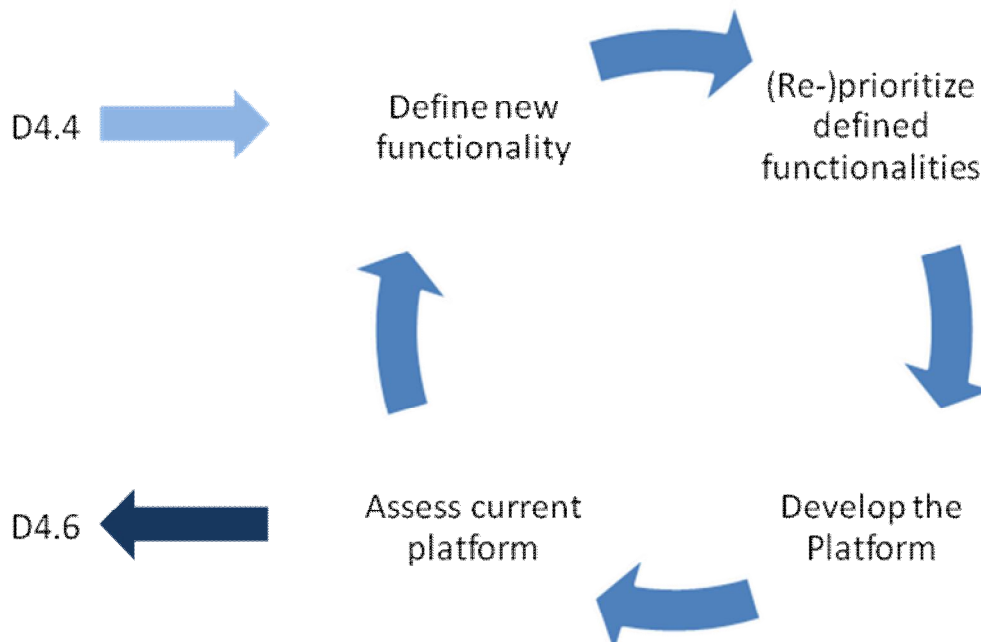
Figure 1: Development process for version 3 of the platform

3.3 Organizational setup

(The dynamic design document was managed by Roger Dols from Morpheus.)

To manage the cyclical process a technical committee was formed, headed by Roger Dols on behalf of WP4 and Peter van Rosmalen on behalf of WP5. Furthermore, the other partners were also involved in order to get their opinion on any added requirement. Several online meetings were held to discuss changes in the requirements. The technical committee also had a discussion at the project meeting in Athens in early March.

After a consortium member had notified WP4 about a demand for new functionality, WP4 would add a functional and technical judgment and a preliminary prioritization.

4 Design decisions regarding the Ideation screen

4.1 Background

During the evaluation of version 2 of the platform, the Ideation screen proved to be one of the most problematic elements to the user. To solve this issue a redesign was needed. We considered several options which are discussed below.

4.2 The options which were considered

4.2.1 Option 1 - Screen wide diagram with portlets behind buttons

Most important characteristics:

- Diagram fills the entire screen for optimal use.
- The supportive portlets can be activated by clicking on the appropriate button in the button bar.

Positive aspects:

- The diagram, which is the core piece of this screen, has enough space

Negative aspects:

- Pressing the buttons each time a user needs a supportive portlet might be cumbersome and might keep the user from using them.

Figure 2: Design option 1 for the ideation screen

4.2.2 Option 2 - Keep existing screen and move some portlets

Most important characteristics:

- Design is similar to version 2
- A few portlets would be removed from this screen, leaving only four portlets
- Other portlets would go to another screen

Positive aspects:

- The screen would be less crowded with portlets compared to version 2

Negative aspects:

- Screen would still be difficult to grasp
- Diagram window would still be too small
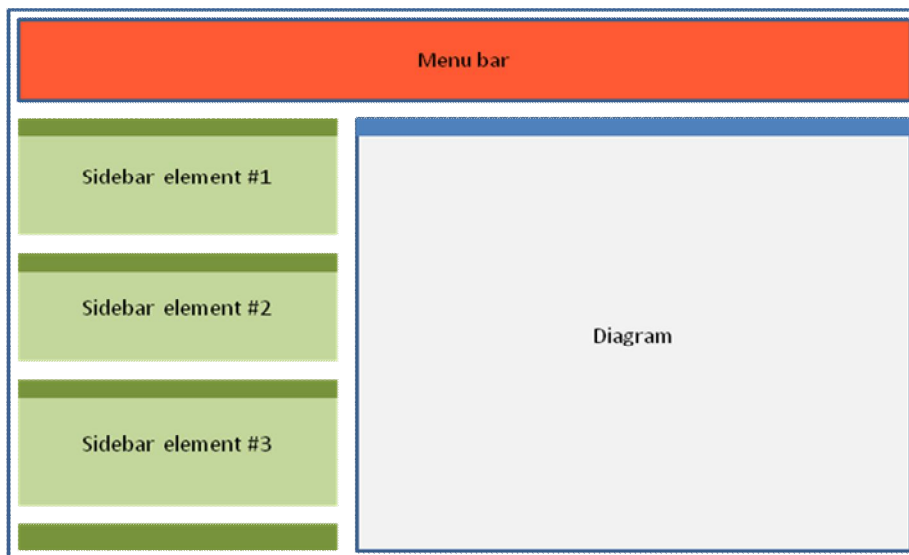
Figure 3: Design option 2 for the ideation screen

4.2.3 Option 3 - Screen wide diagram with sidebar

Most important characteristics:

- Diagram fills the entire screen for optimal use
- Sidebar contains all supportive portlets in the form of widgets
- Sidebar can be hidden and restored with one mouse click
- Widgets can be reordered in the sidebar to accommodate the users personal preference

Positive aspects:

- This design should be familiar to users from applications such as Google Maps
- The diagram, which is the core piece of this screen, has enough space

Negative aspects:

- None

Figure 4: Design option 3 for the ideation screen

4.3 Our decision

At the project meeting in Athens, we decided to go for option 3 for the following reasons:

- The diagram window would be full screen
- At the same time the sidebar would provide direct and full access to the supportive portlets

- It is a very contemporary design and it is easy to extend.

5   Requirements

5.1   Overview

For a description of each of these requirements, please check the following paragraphs.

Table 1: Requirements

No.	Requirement name	Priority[1]
1	Add resources to project	2
2	Link resources to other topics	2
3	Save sketch as resource	4
4	Project summary page	2
5	Recommend alternative strategies	2
6	Redesign the Ideation screen	1
7	Moderator is default user in groups	2
8	Upgrade chat functionality	5
9	User summary on welcome screen	2
10	Fix synchronization issues	2
11	Make GUI more intuitive	1
12	User history for undo	5
13	Limit delete actions in collaboration screens	5
14	Co-browsing	3
15	Implementing Strategies	1
16	Usage of transformations portlet	2
17	Provide better support for the moderator	1
18	Improve recommendations	1
19	Extend the wiki	1
20	Implementing creativity techniques	1
21	Labeling associations between ideas	1
22	System requirements on login page	3
23	Better support for project definition steps	1
24	Changes for recommendations module	1
25	Improve the profile page	2
26	Improve the common ground page	1
27	Create activity monitor	1
28	Rules of engagement	2
29	Improve the goals page	1
30	Improve the evaluation page	1
31	Improve the solution page	1
32	Strategy selection support	2
33	Creativity technique selection support	2
34	Improve voting	2

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[1] 1 = highest 5 = lowest

5.2 Matching Heuristic evaluation to Requirements

The table below shows which issue from the heuristic evaluation is matched by which requirements from this document.

The lines marked in red and bold are issues considered most relevant by SAS, who made the Heuristic Evaluation report. These issues should be solved in the final version of the platform.

Table 2: Requirements matched to heuristics evaluation

Issue from Heuristic evaluation	Severity	Req No	Requirement name
20	4	11	Make GUI more intuitive
21	3	23	Better support for project definition steps
22	3	22	System requirements on login page
25	3	11	Make GUI more intuitive
26	3	11	Make GUI more intuitive
27	**4**	**18**	**Improve recommendations**
29	3	22	System requirements on login page
30	**4**	**32**	**Strategy selection support**
33	3	11	Make GUI more intuitive
36	**4**	**24**	**Changes for recommendations module**
37	3	11	Make GUI more intuitive
38	3	24	Changes for recommendations module
40	3	22	System requirements on login page
41	**4**	**33**	**Creativity technique selection support**
42	3	6	Redesign the Ideation screen
		11	Make GUI more intuitive
45	3	11	Make GUI more intuitive
46	**4**	**18**	**Improve recommendations**
49	**4**	**26**	**Improve the common ground page**
53	4	34	Improve voting
65	**4**	**18**	**Improve recommendations**
68	**4**	**17**	**Provide better support for the moderator**
70	**4**	**6**	**Redesign the Ideation screen**
80	**4**	**18**	**Improve recommendations**
82	**4**	**20**	**Implementing creativity techniques**

5.3 Scheduled Requirements

The following requirements have been included in our planning:

Table 3: Scheduled requirements

Req No	Requirement
1	Add resources to project
2	Link resources to other topics
4	Project summary page
5	Recommend alternative strategies
6	Redesign the Ideation screen
8	Upgrade chat functionality
10	Fix synchronization issues
11	Make GUI more intuitive
13	Limit delete actions in collaboration screens
15	Implementing Strategies
16	Usage of transformations portlet
17	Provide better support for the moderator
18	Improve recommendations
19	Extend the wiki
20	Implementing creativity techniques
21	Labeling associations between ideas
23	Better support for project definition steps
24	Changes for recommendations module
25	Improve the profile page
26	Improve the common ground page
27	Create activity monitor
28	Rules of engagement
29	Improve the goals page
30	Improve the evaluation page
31	Improve the solution page
32	Strategy selection support
33	Creativity technique selection support
34	Improve voting

5.4 Requirement details

5.4.1 Add resources to project

Req name	Add resources to project
Req ID	1
Short Description	Add resources to the project by adding links to files.
Concerns Screens	Resource screen
Define Functionality	Adding a resource will be done by adding a link to a file (such as doc, xls, jpg, pdf, mpg, html). Along with the link information such as the name for the resource, a description and keywords describing the knowledge domain must be provided. These added resources can then be opened in their native environments. The type of resources that can be added may be limited to conventional file types, in order to avoid cluttering the system with unopenable files. Files types such as exe and dll are not accepted.
Posted by	Design document v2, UCY
Purpose	Extend functionality: support collaboration by including relevant resources
Review comment by Admin	
Functional Assessment	These resources can be used to aid the discussion and and enhance the creative process by providing background information about ideas and solutions. The files will not be uploaded to the system, but rather linked via URI's. Although storing files on the system might have advantages, it requires adequate file management functionality and it clogs up the system. So for reasons of time and money this will not be done.
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.2 Link resources to other topics

Req name	Link resources to other topics
Req ID	2
Short Description	Link resources with concepts, goals, ideas and solutions
Concerns Screens	Common Ground, Goals, Ideation
Define Functionality	On each of these screens, the user can add a resource, which will be linked to the currently selected topic in that screen.
Posted by	Design document v2, UCY
Purpose	Extend functionality: support collaboration by letting users link resources to ideas, goals, concepts and solutions
Review comment by Admin	
Functional Assessment	Requires the availability of the Resource screen
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.3 Save sketch as resource

Req name	Save sketch as resource
Req ID	3
Short Description	A sketch made with the sketch editor is saved as a resource in the project.
Concerns Screens	Sketch screen
Define Functionality	A sketch made with the sketch editor is saved and added to the project as a resource (see IssueID 1). Also an idea-topic is created to which the resource is mapped (see IssueID 2).
Posted by	Consortium meeting at midterm review
Purpose	Improve functionality: reuse a sketch as a resource
Review comment by Admin	This technique has to be investigated further to establish its technical feasability within the project.
Functional Assessment	This assumes the presence of the sketch editor in version 3 of the platform, which is under discussion, because of the doubt about its use, which arose during evaluation sessions.
Technical Assessment by Morph	
Assigned to	AAU
Current Status	Not selected for Implementation

5.4.4 Project summary page

Req name	Project summary page
Req ID	4
Short Description	The overview screen will have an extra portlet in which summary info about the project is shown.
Concerns Screens	Overview
Define Functionality	The overview screen will have an extra portlet in which summary info about the project is shown. This will include the following info: 1. Formulated goals (of which *x* solved) 2. Formulated concepts 3. Number of ideas in y sessions (of which *x* are accepted) 4. Number of voting round (of which *x* are closed) This information is provided as read only and cannot be edited. This information informs the user as to the current status of the project. The portlets containing step 2-5 (problem statement, Strategy, Technique and Groups) can be contained in one combined portlet. The summary portlet would then be the third portlet.
Posted by	Consortium meeting at midterm review
Purpose	Extend functionality: Improve feedback about the current project to the user
Review comment by Admin	Item 5 in the Define Functionality row should be assessed whether this is feasible because it requires all entries to have a timestamp. If this is too much of a burden on the system, in terms of performance, then this part might be dropped or simplified.
Functional Assessment	No problems as foreseen. The only issue is to present the contents of this portlet in a clear way. Another is to present the information in a pop up screen, which keeps the overview screen clean.
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.5   Recommend alternative strategies

Req name	Recommend alternative strategies
Req ID	5
Short Description	The Context Awareness Component should recommend a suitable strategy.
Concerns Screens	Strategy
Define Functionality	When the user is in the Strategy screen, the Context Awareness Component should recommend the strategy that best fits the project, based on the info already entered. When that recommended strategy is already selected by the user, then this should be communicated (in the form of a message) to the user.
Posted by	Consortium meeting at midterm review
Purpose	Improve functionality: support the moderator in selecting a suitable strategy
Review comment by Admin	
Functional Assessment	In the case that the best fit strategy is selected, the module might also suggest a (less fitting) alternative strategy.
Technical Assessment by Morph	
Assigned to	UCY
Current Status	Finished

5.4.6 Redesign the Ideation screen

Req name	Redesign the Ideation screen
Req ID	6
Short Description	The Ideation screen should be redesigned to work more intuitively
Concerns Screens	Ideation
Define Functionality	The Ideation screen should be redesigned to work more intuitively. This means that the screen should provide a more clear distinction between: • ideation portlets - idea editor, idea properties • Supportive portlets - statement portlet, reasoning portlet, transformation portlet, CA-module portlet • Session portlets - Create session, open session (integrated into one portlet) (use ´Diagram´ instead of ´Session´) Other changes: • Moderator selects goals • Provide user with an overview of goals that a team is working on, selected strategy (-step) and selected creativity technique. • The ideation screen should also incorporate an activity monitor. (See requirement 27) • The user should be able to publish private diagrams so all users can view it. • The properties portlet, supportive portlets and session portlets are callable with a button *This solves issue 42 and 70 of the Heuristic Evaluation form v1.0*
Posted by	Consortium meeting at midterm review
Purpose	Improve functionality: remove clutter of portlets in ideation screen and make it more intuitive
Review comment by Admin	The review comments are needed to make a proper redesign
Functional Assessment	The Ideation screen will only contain the idea editor. The supportive and session portlets are visible in sidebar on the right side of the screen.
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.7 Moderator is default user in groups

Req name	Moderator is default user in groups
Req ID	7
Short Description	Moderator should be default user, so that he/she is added automatically to groups, sessions, etc.
Concerns Screens	Groups
Define Functionality	When a group is created, by the moderator, then this moderator will be automatically added to the group.
Posted by	Consortium meeting at midterm review
Purpose	Improve functionality: avoid mistakes in group selection
Review comment by Admin	
Functional Assessment	This means that the moderator will be an active participant in the voting process and thus in the discussion. Is this desirable?
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Not selected for Implementation

5.4.8 Upgrade chat functionality

Req name	Upgrade chat functionality
Req ID	8
Short Description	Extending chat functionality, switch from local to project-wide, platform-wide
Concerns Screens	All
Define Functionality	An alternative to the current chat functionality is to drop this functionality and use tools such as Skype. This will also clean up the screens. The Skype-tool should be used outside of the idSpace environment and will not be integrated into the platform because this would cost too much time to develop.

Update: chat functionality will be left out iof the platform. |
Posted by	Consortium meeting at midterm review
Purpose	improve functionality: make chat more useful
Review comment by Admin	After discussion within the consortium, it seems wise to drop the chat functionality and go for tools such as Skype.
Functional Assessment	It should be made clear to the users that skype-like tools are advised to be used to support the team effort.
Technical Assessment by Morph	No issues
Assigned to	MORPH
Current Status	Finished

5.4.9 User summary on welcome screen

Req name	User summary on welcome screen
Req ID	9
Short Description	The welcome screen will have an extra portlet in which summary info about open tasks and voting rounds is shown.
Concerns Screens	Overview
Define Functionality	The welcome screen will have an extra portlet in which summary info about open tasks and voting rounds is shown. This will include the following info: 1. Sessions per project in which the user participates 2. Number of open voting rounds per project 3. Number of goals (per project) that still have to be met 4. list of new/changed items since last log-in
Posted by	Consortium meeting at midterm review
Purpose	Extend functionality: give feedback to the user about his current activities
Review comment by Admin	
Functional Assessment	No issues
Technical Assessment by Morph	No issues
Assigned to	MORPH
Current Status	Not selected for Implementation

5.4.10 Fix synchronization issues

Req name	Fix synchronization issues
Req ID	10
Short Description	Fix the unsolved synchronization issues
Concerns Screens	Common Ground, Goals
Define Functionality	In the Common Ground and the Goals screens there are unsolved issues with synchronizing the list portlet. These issues should be fixed so users don't have to press the refresh buttons
Posted by	Consortium meeting at midterm review
Purpose	improve functionality: make collaboration more intuitive in Common Ground and Goals screen
Review comment by Admin	Transition to OKS-5 is picked up already
Functional Assessment	No issues
Technical Assessment by Morph	Transition from OKS-3 to OKS-5 is a basic need to make a start in solving this issue. Further development is needed.
Assigned to	MORPH
Current Status	Finished

5.4.11 Make GUI more intuitive

Req name	Make GUI more intuitive
Req ID	11
Short Description	Upgrade the platform's GUI to make it more intuitive
Concerns Screens	All
Define Functionality	Usability/GUI: • descriptions of fields sometimes merged (as in profile page). They should be visually distinct. • fonts should be of one type throughout the platform. • highlighting selected options in lists. • Labeling should be done in understandable terms and should be consistent throughout the system. • Screen design should fit 1280 * 1024 wherever possible. • Standardize look-and-feel of the editing buttons. *(This solves issue 20 of the Heuristic Evaluation form v1.0)* • There should be a clear distinction between core portlets and supportive portlets. (blue vs gray bar) • Current menu option should be highlighted • Top 1/3 of the screen should be smaller: smaller logo, … • Change mouse pointer to arrow when over a link • Drop down lists should have an intuitive order *This solves issue 25, 26, 33, 37, 42 and 45 of the Heuristic Evaluation form v1.0*
Posted by	Consortium meeting at midterm review
Purpose	Improve functionality: make GUI more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.12 User history for undo

Req name	User history for undo
Req ID	12
Short Description	Keep a history for a user to enable undo actions
Concerns Screens	All
Define Functionality	All user actions must be logged in order to facilitate undo actions.
Posted by	Consortium meeting at midterm review
Purpose	improve functionality: enable user to undo his actions
Review comment by Admin	I strongly advise against this functionality for the following reasons: • An undo action can trigger a long line of undo actions which include changes made by other users who don't want their contribution to be undone. • An undo action might lead to data inconsistency, unless you also delete all other data depending on the presence of the to-be-deleted-data. • Undo functionality might lead to 'trigger happiness' of users because action have less consequences. Users can start entering what they want without giving it any thought. • Making mistakes is not a problem; it's a feature of creative group processes. This means that a team should not spend lots of time deleting undesirable ideas, but focus on the usable ones. Undoing actions therefore has little value.
Functional Assessment	Too many drawbacks. This will not be developed.
Technical Assessment by Morph	Too many drawbacks. This will not be developed.
Assigned to	MORPH
Current Status	Not selected for Implementation

5.4.13 Limit delete actions in collaboration screens

Req name	Limit delete actions in collaboration screens
Req ID	13
Short Description	Users should only be able to delete their own contributions, not those of other users.
Concerns Screens	Common ground, Goals, Ideation, Evaluation, Solution
Define Functionality	Users should only be able to delete their own contributions, not those of other users. Only the moderator will have broader delete options. Update: Deleting remains possible. The moderator should guide the users through behavioural guidelines!
Posted by	Consortium meeting at midterm review
Purpose	improve functionality: avoid irritations in collaborative processes
Review comment by Admin	An important limitation of this is that deletions should only be possible if it doesn't lead to data inconsistency, such as ideas that loose their connection to the other ideas because the data 'in between' is lost. Update: Allow deleting. The moderator should guide the users through behavioural guidelines!
Functional Assessment	No issues
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.14 Co-browsing

Req name	Co-browsing
Req ID	14
Short Description	A moderator can follow the browsing actions of team members by catching their browser calls and mimicing them.
Concerns Screens	Co-browse screen
Define Functionality	The browser calls of a team member are caught. The moderator can follow these calls to see what the team members are doing. This enables the moderator to communicate with the team members on the tasks at hand and to (re-)focus them. The co-browsing screen can be shown in a new tab of the browser, leaving the current screen intact.
Posted by	MORPH
Purpose	Extend functionality: extend the moderator's overview of the team activities
Review comment by Admin	This technique has to be investigated further to establish its technical feasibility within the project. Update: Will not be implemented due to time constraints
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Not selected for Implementation

5.4.15 Implementing Strategies

Req name	Implementing Strategies
Req ID	15
Short Description	Improve implemention of strategies in the platform.
Concerns Screens	All
Define Functionality	Improve implemention of strategies in the platform. This includes: • Currently implemented strategies should provide the user with better guidance by defining clearer tasks • The consequence of a selected strategy, should be made clear in the strategy screen where it is selected • Wiki-pages should provide better explanation about the strategy and their role in the platform • The moderator should be able to check off the Strategy steps which the team finished At least two of the currently available strategies should be fully implemented in the platform.
Posted by	Consortium meeting at midterm review
Purpose	Improve functionality: improve the use of strategies
Review comment by Admin	After discussion with Peter Sloep and Peter van Rosmalen it was decided that we should focus on implementing 2 strategies and make sure that these are implemented properly . Implementation of more strategies will not be done in version 3. Instead we will focus on improving the currently supported ones.
Functional Assessment	Input from WP1-3 should be made available on short notice.
Technical Assessment by Morph	
Assigned to	OUNL, MORPH
Current Status	Finished

5.4.16 Usage of transformations portlet

Req name	Usage of transformations portlet
Req ID	16
Short Description	Improve the usage of the transformations portlet
Concerns Screens	Ideation
Define Functionality	This functionality will only be available to the moderator, to aid his task of clustering ideas for further discussion. The output of a transformation should be given a proper name, other than transmuted diagram. This name should be provided by the user.
Posted by	Roger Dols after meeting with Peter Sloep and Peter van Rosmalen
Purpose	Improve functionality: limit the use to only the moderator in order to avoid uncontrolled growth of no of transmuted diagram
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	AAU
Current Status	Finished

5.4.17 Provide better support for the moderator

Req name	Provide better support for the moderator
Req ID	17
Short Description	Implement improvements to the platform to better support the moderator
Concerns Screens	All
Define Functionality	These improvements include: • Improve the briefing package • Implementing Req ID 6, 8, 13, 14, 27 and 28 • Implement the strategies in a better way to provide the team members with clearer tasks. (Req 15) • Add mouse-over labeling. This makes the fields more self-explanatory, which gives the moderator more time to focus on team management.
Posted by	Roger Dols after meeting with Peter Sloep and Peter van Rosmalen
Purpose	Improve functionality: empower the moderator by better information
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.18 Improve recommendations

Req name	Improve recommendations
Req ID	18
Short Description	The current Context Awareness component should be improved.
Concerns Screens	Groups, Problem statement, Ideation, Solution
Define Functionality	The current Context Awareness component should be improved. These improvements include: • Allign the font types with those used in the platform. • Remove any existing errors • Extend the platform with background datasets to ensure that users can get recommendations. • Make the labeling of the tool in the platform more self-explanatory and consistent. • Ensure that the ontologies for platform and recommendations tool are alligned by design • Likert scale of recommendations in common ground should be horizontal rather than vertical. *This solves issue 27, 46, 65 and 80 of the Heuristic Evaluation form v1.0*
Posted by	Roger Dols after meeting with Peter Sloep and Peter van Rosmalen
Purpose	Improve functionality: make recommendations more intuitive
Review comment by Admin	
Functional Assessment	Resources need to be implemented in the platform in order for the recommendations to work completely. In version 2 these were not implemented.
Technical Assessment by Morph	
Assigned to	UCY, MORPH and WP1-3 partners
Current Status	Finished

5.4.19 Extend the Wiki

Req name	Extend the Wiki
Req ID	19
Short Description	The current Wiki should be extended
Concerns Screens	Wiki pages
Define Functionality	The Wiki should give the user better guidance in using the platform and a better explanation about the platform. The Wiki should: • Explain the core concepts of the idSpace platform • Explain each of the screens and its components • Explain the process supported by the platform • Explain the different roles in relation to the process and the screens
Posted by	Roger Dols after meeting with Peter Sloep and Peter van Rosmalen
Purpose	Improve functionality: improve support for the users
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH and WP1-3 partners
Current Status	Finished

5.4.20 Implementing creativity techniques

Req name	Implementing creativity techniques
Req ID	20
Short Description	Of the current CT's at least two should be fully implemented in the platform
Concerns Screens	All
Define Functionality	The statement portlet of the ideation screen should contain a full set of questions of at least two CT's. These questions will then be used to label the associations between ideas. Moderator should be able to turn the statement portlet on and off Statement choice only by moderator *This solves issue 82 of the Heuristic Evaluation form v1.0*
Posted by	Peter Sloep and Peter van Rosmalen
Purpose	Improve functionality: increase diversity of CT's and questions/statements
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH, UHILD
Current Status	Finished

5.4.21 Labeling associations between ideas

Req name	Labeling associations between ideas
Req ID	21
Short Description	The labeling of associations between ideas should be improved.
Concerns Screens	Ideation
Define Functionality	Currently the labeling is done by combining the selected statement with the "triggered by" label. Users can then still edit this label to fit their own needs. Labeling should be improved by: • Using the extended set of statements • Statement will be the type of the association • After refresing the diagram, the correct label should still be visible The mouse-over label will show the association type *This solves issue 68 of the Heuristic Evaluation form v1.0*
Posted by	Peter Sloep and Peter van Rosmalen
Purpose	Improve functionality: provide for better labeling of relations between ideas
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH and WP1-3 partners
Current Status	Finished

5.4.22 System requirements on login page

Req name	System requirements on login page
Req ID	22
Short Description	The login page should mention the system requirements
Concerns Screens	Welcome
Define Functionality	The login page should mention the system requirements: • Which browsers are supported • What screen resolution and mode (maximized) is demanded *This solves issue 22, 29 and 40 of the Heuristic Evaluation form v1.0*
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: inform users of system requirements
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Not selected for Implementation

5.4.23 Better support for project definition steps

Req name	Better support for project definition steps
Req ID	23
Short Description	The project definition steps (in overview screen) should be more intuitive.
Concerns Screens	Overview, Problem statement, Strategy, Technique, Groups
Define Functionality	The project definition steps (in overview screen) should be more intuitive.: • In each screen there should be a next step button • after pressing the next step button the fields should be saved *This solves issue 21 of the Heuristic Evaluation form v1.0*
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make project definition phase more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.24 Changes for recommendations module

Req name	Changes for recommendations module
Req ID	24
Short Description	Improve the existing functionality of the Context Awareness component.
Concerns Screens	Groups, Problem statement, Ideation, Solution
Define Functionality	Improve the existing functionality of the Context Awareness component • The recommendations module should already contain recommendations (using default values currently shown) at startup. • Add advanced-button in case the user wants to set other values to get recommendations. • Go back option after having clicked *Go To Project*. • Recommendations not in bold font • When showing project details, also include contact info stored in the DB • 'recommended solutions' should be called 'related problems' • Some settings for recommendations are fields which have already been entered by the user. These should be left out. *This solves issue 36 and 38 of the Heuristic Evaluation form v1.0*
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make recommendations more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	UCY
Current Status	Finished

5.4.25 Improve the profile page

Req name	Improve the profile page
Req ID	25
Short Description	Improve the profile page.
Concerns Screens	Profile
Define Functionality	Improve the profile page: • Profiles are shared by default. • Mouse-over help texts form labels
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make profile page easier to use
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.26 Improve the common ground page

Req name	Improve the common ground page
Req ID	26
Short Description	Improve the common ground page.
Concerns Screens	Common Ground
Define Functionality	Improve the common ground page: • users still can delete stuff entered by others, however, we're not going to inhibit this. That very fact that this is possible should be flagged in the wiki, as is the fact that editing is possible too. • Message "topic doesn't exist. ..." with add: remove the message • Common ground: don't recommend users here, It should be in the groups page • Selected concept highlighted *This solves issue 49 of the Heuristic Evaluation form v1.0*
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.27 Create activity monitor

| Req name	Create activity monitor
Req ID	27
Short Description	Create an activity monitor which aids users to keep live track of actions by other users.
Concerns Screens	Ideation
Define Functionality	Create an activity monitor which aids users to keep live track of actions by other users. This monitor should show: • To the user o Actions by other users o Location of each user • To the moderator o Add, edit and delete actions by other users o Location of each user
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Extend functionality: improve the situational awareness of users
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	We have to do a technical study to establish the teachnical feasability of this function.
Assigned to	MORPH
Current Status	Finished

5.4.28 Rules of engagement

Req name	Rules of engagement
Req ID	28
Short Description	A set of rules should be set up and incorporated in the wiki and the briefing package.
Concerns Screens	No screens: Wiki pages, briefing package
Define Functionality	A set of rules of behaviour for team members should be set up and incorporated in the wiki and the briefing package. These rules concern: • Kicking and banning a user is possible in the groups screen • Deleting content remains possible. The user should be informed of the consequence of such an action and asked to behave responsible in order to assure good team work • Allow multiple definitions and let the moderator manage the process. Kicking and banning is possible as last resort • Instruct users to behave responsible, don't delete other's input.
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve basis for collaboration
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.29 Improve the goals page

Req name	Improve the goals page
Req ID	29
Short Description	Improve the goals page.
Concerns Screens	Goals

Define Functionality	Improve the goals page:
	
	• Guidelines in wiki: add something in description? The name of the editor should be added.
	   o For example, write: "Roger: i think this description is measurable enough"
	
	• The SMART/elements should instead contain a description field in which the user can state why he thinks smart or not.
	
	• Change the names label: 'Goal'
	
	• Change the names label: ' Goal is smart' to 'Goal is smart? , etc. for all '
	
	• Goals are: accepted, rejected or open
	   o Instead of colours, use other signs (colour blindness)
	
	• The goals list should indicate which goals are accepted and which are rejected

Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.30 Improve the evaluation page

Req name	Improve the evaluation page
Req ID	30
Short Description	Improve the evaluation page.
Concerns Screens	Evaluation
Define Functionality	Improve the evaluation page: • By default only the moderator can see the diagrams in his list. He can make a diagram available to the team members by marking a diagram. • Diagrams should be connected to goals. The goals connected to a diagram should be visible. • The moderator should be able to show which goal is being discussed. • A user should be able to see the diagram (read only) being discussed. • Per diagram, interconnected ideas should be voted on (box with vote box plus motivation description field) o rendering some greyd out/red if they are rejected, some green/white if they are accepted • There should also be a description box on the screen, which shows the description of the idea selected Update: This page will have the same layout as the ideation page. This means a screen filling diagram and portlets in the right hand sidebar.
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	Moderator selecteert 1 diagram voor users Na selectie: user ziet 1 diagram (list verdwijnt) User moet ook goal zien
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.31 Improve the solution page

Req name	Improve the solution page
Req ID	31
Short Description	Improve the solution page.
Concerns Screens	Solution
Define Functionality	Improve the solution page. The solution page is about synthesizing. The intention is: • checking whether your ideas solve each goal and solve the problem • If gaps remain, then go back and fill the gaps in goals-ideas To do this, the users need to see: • Problem statement • Goals • Ideas Decision making will be removed from this screen.
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.32 Strategy selection support

Req name	Strategy selection support
Req ID	32
Short Description	The moderator should be supported in selecting a strategy.
Concerns Screens	Strategy
Define Functionality	The moderator should be supported in selecting a strategy. This should be done by providing the moderator with a matrix of characteristics of the currently selected strategy. This matrix should be provided by WP1. (Check wether the already delivered matrix suffices) *This solves issue 30 of the Heuristic Evaluation form v1.0*
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.33 Creativity technique selection support

Req name	Creativity technique selection support
Req ID	33
Short Description	The moderator should be supported in selecting a creativity technique.
Concerns Screens	Strategy
Define Functionality	The moderator should be supported in selecting a creativity technique. This should be done by providing the moderator with a matrix of characteristics of the currently selected creativity technique. This matrix should be provided by WP2. (Check wether the already delivered matrix suffices) *This solves issue 41 of the Heuristic Evaluation form v1.0*
Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

5.4.34 Improve voting process

Req name	Improve voting
Req ID	34
Short Description	Improve the voting mechanism and process.
Concerns Screens	Common ground, Goals, Evaluation

Define Functionality	Improve the voting mechanism and process by:
	• using the activity monitor to inform the team members that the moderator started a voting round
	• flagging items in lists containing votable items
	    o items that should be voted on, must be flagged
	    o items that have been voted on, must be flagged
	
	This solves issue 53 of the Heuristic Evaluation form v1.0

Posted by	Session with OUNL & MORPH on 29-01-2010
Purpose	Improve functionality: make collaboration more intuitive
Review comment by Admin	
Functional Assessment	
Technical Assessment by Morph	
Assigned to	MORPH
Current Status	Finished

6 Activity log of WP4 for version 3 of the platform
Until 29 march 2010

The table below lists the activities undertaken in WP4 for version 3 of the idSpace platform. This list will be extended continuously to keep all partners informed on the progress in WP4.

Table 4: Activity log

Task	Performed by	Date	Action	Outcome
Develop idSpace platform for v3	MORPH	11-2-2010	Upgrade OKS-3 to OKS-5.	idSpace now is built on OKS-5
Define requirements	MORPH	11-2-2010	Describe requirements.	idSpace - Requirements for version 3-0
Define requirements	MORPH	11-2-2010	Gathered first feedback concerning the requirements	idSpace - Requirements for version 3-1
Define requirements	OUNL, MORPH	11-2-2010	Walkthrough of the platform at OUNL.	List of requirements
Define requirements	MORPH	11-2-2010	Integrate walkthrough results in Requirements.	idSpace - Requirements for version 3-2
Define requirements	MORPH	11-2-2010	Integrate Heuristic evaluation results in Requirements.	idSpace - Requirements for version 3-3
Develop idSpace platform for v3	MORPH	11-2-2010	Req_11: Platform menu improved.	Menu layout takes less screen space
Develop idSpace platform for v3	MORPH	11-2-2010	Req_11: Use of mouse pointer improved.	Mouse pointer changes when over a clickable item
Develop idSpace platform for v3	MORPH	11-2-2010	Req_08: Remove chat portlet.	Chat portlet no longer present in v3
Develop idSpace platform for v3	MORPH	11-2-2010	Req_11: List of goals and concepts improved.	Selected list option now is highlighted
Develop idSpace platform for v3	MORPH	11-2-2010	Req_23: Add next-step-button in overview screen.	A user can now click the next step button in each of the overview screens (for example: to go directly from problem statement to strategy)

Define requirements	MORPH	11-2-2010	Analyze requirements and priorities for planning.	Morpheus internal planning for the requirements assigned to Morpheus.
Define requirements	MORPH	11-2-2010	Map requirements to heuristic evaluation results. Include scheduled requirements overview.	idSpace - Requirements for version 3-4
Develop idSpace platform for v3	MORPH	12-2-2010	Mail exchange about assignments during beginning of February	Clarity about assignment of requirements
Develop idSpace platform for v3	UCY	18-2-2010	Req_18: Several bugs in recommender-module solved	Part of the bugs are solved
Develop idSpace platform for v3	MORPH	18-2-2010	Morph will check if they can supply UCY the strategy-query to get filled in fields, for the Recommender-module.	Done
Define requirements	MORPH	18-2-2010	RD has set up a meeting of the Technical Committee	Meeting on 22-2-2010 on 10.00 CET
Define requirements	MORPH, OUNL, AAU, UCY, UHILD	22-2-2010		Requirements and priorities accepted. One-on-one meetings for development of specific requirements.
Define requirements	All partners	4-3-2010	Project meeting in Athens	Present current status of the platform in development process.
Define requirements	All partners	4-3-2010	Meeting Technical Committee	Design adjustment of Ideation screen based on discussion in the meeting
Develop idSpace platform for v3	MORPH	20-3-2010	Test release of version 3 of the platform	Done
Develop idSpace platform for v3	OUNL, MORPH	23-3-2010	Test walkthrough of the platform	List of remaining issues gathered
Develop idSpace platform for v3	MORPH	24-3-2010	Test release of version 3 of the platform	Done
Develop idSpace platform for v3	OUNL, MORPH	25-3-2010	Test walkthrough of the platform	List of remaining issues gathered
Develop idSpace platform for v3	MORPH	30-3-2010	Delivery of version 3 of the platform	Done

7 Delivered requirements

Table 5: Delivered requirements

Req no	Requirement	Requirement element
1	**Add resources to project**	Add Resource-Page Add menu item for Resource-page
2	**Link resources to other topics**	Add sidebar-widget to link to an idea
4	**Project summary page**	Add Project-summary widget to overview screen
5	**Recommend alternative strategies**	Recommend Strategy when entering the page
6	**Redesign the Ideation screen**	Diagram fills entire screen All other portlets become widgets in a sidebar Sidebar can be hidden Widgets can be reordered (order will not be memorized!)
8	**Upgrade chat functionality**	Remove chat portlet from all pages
10	**Fix synchronization issues**	The Common Ground screen has unsolved issues with synchronizing the list portlet In the Goals screens there are unsolved issues with synchronizing the list portlet

11	**Make GUI more intuitive**	
		Field description in Profiles-page should be should be distinct from other lines
		Fonts should be of one type throughout the platform
		Highlighting selected options in lists
		Labeling should be done in understandable terms and should be consistent throughout the system
		Screen design should fit 1280 * 1024 wherever possible
		Standardize look-and-feel of the editing buttons
		There should be a clear distinction between core portlets and supportive portlets
		Current menu option should be highlighted
		Top 1/3 of the screen should be smaller: smaller logo, ...
		Change mouse pointer to arrow when over a link
13	**Limit delete actions in collaboration screens**	
		Deleting remains possible
15	**Implementing Strategies**	
		Currently implemented strategies should provide the user with better guidance by defining clearer tasks
		The consequence of a selected strategy, should be made clear in the strategy screen where it is selected
		Wiki-pages should provide better explanation about the strategy and their role in the platform
		Merge Actions and Strategy details into 1 portlet
16	**Usage of transformations portlet**	
		Add possibility to rename a 'Transmuted diagram'
17	**Provide better support for the moderator**	
		Improve the briefing package
		Implementing Issue ID 6, 8, 13, 27 and 28
		Implement the strategies in a better way to provide the team members with clearer tasks. (issue 15)
		Add mouse-over labeling

18	**Improve recommendations**	
		Allign the font types with those used in the platform
		Remove any existing errors
		Extend the platform with background datasets to ensure that users can get recommendations
		Make the labelling of the tool in the platform more self-explanetory and consistent
		Ensure that the ontologies for platform and recomendations tool are alligned by design
		Likert scale of recommendations in common ground should be horizontal rather than vertical
19	**Extend the wiki**	
		Explain the core concepts of the idSpace platform
		Explain each of the screens and its components
		Explain the process supported by the platform
		Explain the different roles in relation to the process and the screens
20	**Implementing creativity techniques**	
		The statement portlet of the ideation screen should contain a full set of questions of at least two CT's
		Moderator should be able to turn the statement portlet on and off
		Statement choice only by moderator
21	**Labeling associations between ideas**	
		Using the extended set of statements
		Statement will be the type of the association
		After refreshing the diagram, the correct label should still be visible
23	**Better support for project definition steps**	
		In each screen there should be a next step button
		after pressing the next step button the fields should be saved
		Each field should have a default value: empty

24	**Changes for recommendations module**	
		The recommendations module should already contain default recommendations at startup
		Add advanced-button in case the user wants to set other values to get recommendations
		Go back option after having clicked Go To Project
		Recommendations not in bold font
		When showing project details, also include contact info stored in the DB
		'recommended solutions' should be called 'related problems'
		Some settings for recommendations are fields which have already been entered by the user.
25	**Improve the profile page**	
		Profiles should be shared by default
26	**Improve the common ground page**	
		Users still can delete stuff entered by others, however, we're not going to inhibit this.
		Message "topic doesn't exist. ..." with add: remove the message
		Common ground: don't recommend users here, It should be in the groups page
		Selected concept highlighted
27	**Create activity monitor**	
		To the user: Add, edit and delete actions by other users
		To the moderator: Add, edit and delete actions by other users, Location of each user
		Portlet has greyed title bar
28	**Rules of engagement**	
		Kicking and banning a user is possible in the groups screen
		Deleting content remains possible.
		Allow multiple definitions and let the moderator manage the process.
		Instruct users to behave responsible, don't delete other's input

29	**Improve the goals page**	
		Guidelines in wiki: add something in description? The name of the editor should be added.
		The SMART-elements should contain a description field (why smart or not)
		Change the names label: 'Goal'
		Change the names label: ' Goal is smart' to 'Goal is smart? , etc. for all '
		Goals are: accepted, rejected or open
		The goals list should indicate which goals are accepted and which are rejected
30	**Improve the evaluation page**	
		By default only the moderator can see the diagrams in his list. He can make a diagram available to the team members by marking a diagram
		Diagrams should be connected to goals. The goals connected to a diagram should be visible
		The moderator should be able to show which goal is being discussed
		A user should be able to see the diagram (read only) being discussed
		Per diagram ideas should be voted on (box with vote box plus motivation description field)
		There should also be a description box on the screen, which shows the description of the idea selected
31	**Improve the solution page**	
		Checking whether your ideas solve each goal and solve the problem
		The users need to see: Problem statement, Goals, Ideas
32	**Strategy selection support**	
		The moderator should be supported in selecting a strategy
33	**Creativity technique selection support**	
		The moderator should be supported in selecting a creativity technique
34	**Improve the Group page**	
		Merge Actions and User details into 1 portlet