

Development Proposals for Cyn.in

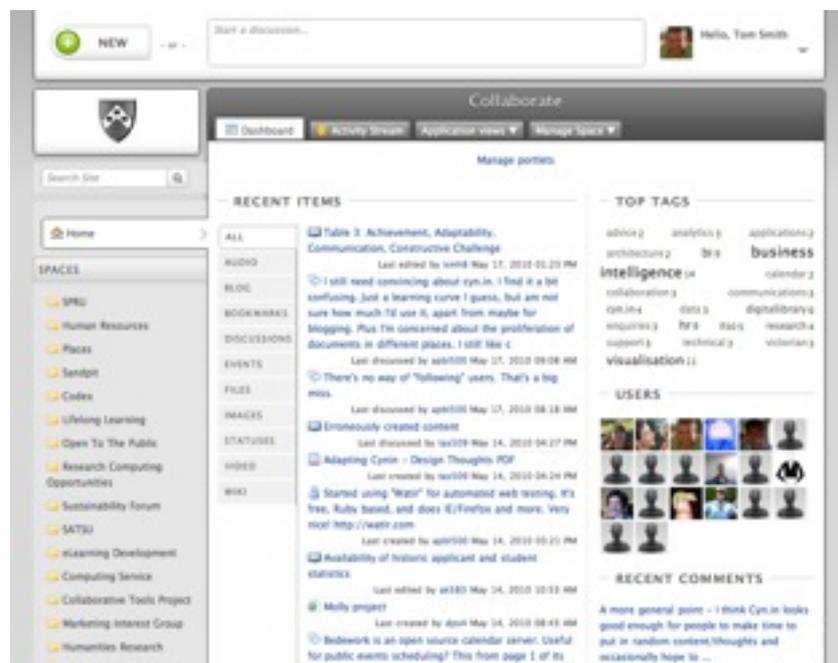
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This document looks at user interface and functionality of Cyn.in with regards to rolling it out as the University of York's collaborative platform.

Because many of the suggestions are interdependent it has been difficult to order this document. I suggest you print it off and scan read it first.

The most important items for development are:

1. The Membership model. Can we LDAP/Shibboleth and can people Invite members into Private areas
2. RSS Feedmixer
3. Extending the Profile (similar to Faculty Staff Directory)
4. The Interface design of the Home Screen (or dealing with the Fire Hose Effect) which might include...
5. Dashboards and Gadgets



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Simplify the Home Screen

When you first create a Cyn.in site its user interface is clear, it's where everything is and might be. But after registering only one hundred people, all of whom created content, the Home Page with its focus on the "Activity Stream" suffers from the *Fire Hose Effect*. There is simply "too much stuff".

After experimenting with creating quite a number of Spaces (51) everyone found the number of them a little overpowering. Even where (and perhaps especially) where people have created Sub-Spaces dealing with what will for most people, for the large part, be irrelevant Spaces needs some improvement.

This suggests...

1. Create a **Spaces Page**, which acts like a Site Map and perhaps lessens the need for ALL the Spaces to be included in the navigation.
2. Enable a **First Time User Wizard** functionality. I could imagine a folder, maybe in the Zope Management Interface, only available to an Admin, where if I added Wiki Pages that they would be displayed, in a given order, to "first time users" in a "Cyn.in Tips" overlay. The content might contain a Welcome message or handy hints, recent developments or mini tutorials and could be dismissed (forever) by unselecting the "Show tips on login" checkbox.
3. The Home Page of Cyn.in probably needs to be authored and designed rather than generated automatically (as it is now) and of course Cynapse can't give us a tool that does that. It is important that the Home Page "looks very different" to other areas on the site so that people instantly know where they are. At the moment I would argue that the Home Page is too similar to work Spaces (which themselves are very similar to actual content pages).

The items on the Home Page should probably be more about helping us navigate deeper into the content, or aggregated statistics about the content (to get an overview of what's happening) than being about the content itself.

4. Having said that the Home Page should be more of **Community Dashboard** it might also include "Random Person of the Day" or "Hot topics this week" to gently encourage exploration around unfamiliar Spaces where appropriate rather than ramming "foreign" content down peoples', er, eyeballs.

But deciding what this design should and might be BEFORE you have the content is difficult because the interface would make no sense until the content exists.

As a related note, whilst the Statistics portlet really does make sense on the Home Page (because there is lots of content) it tends to be a superfluous adornment in other Spaces. I would like to propose that...

- a. The Statistics portlet isn't one of the default portlets that get added to a new Space

b. That the Statistics portlet be re-designed so that it works well in the Right Hand Sidebar area. It's a lovely addition, but not "full page width lovely".

One promising yet unfinished feature of competitor SocialText was that the Home Page acts like a **Personal / Social Dashboard**. In their case, it even has the ability to host Google Gadgets that might display say someone's 5 most recent GMails, or a Google Calendar gadget.

As we discussed earlier, Plone does have a Dashboard feature that Cynapse have chosen to downplay a touch, that I would like to revitalise a shade. I know that this is wanting my cake and eating it, but the Home Screen has an awful lot to do to be effective and should have many abilities. It should have...

a. **Content Authored by the Site Creator.** This might be a Welcome text and/or Branding to make the Home Page unique. It might be "Must Read News", "Watch out for aggressive geese everyone!".

b. **Content Oriented Helpful Overview Items.** Recent Items, Recent Users, Person of the Day etc.

c. **Aggregated Statistics.** Including Visualisations or a Tag Cloud to help people to understand the "feel" of the community content or user activity or to dive deeper into relevant materials.

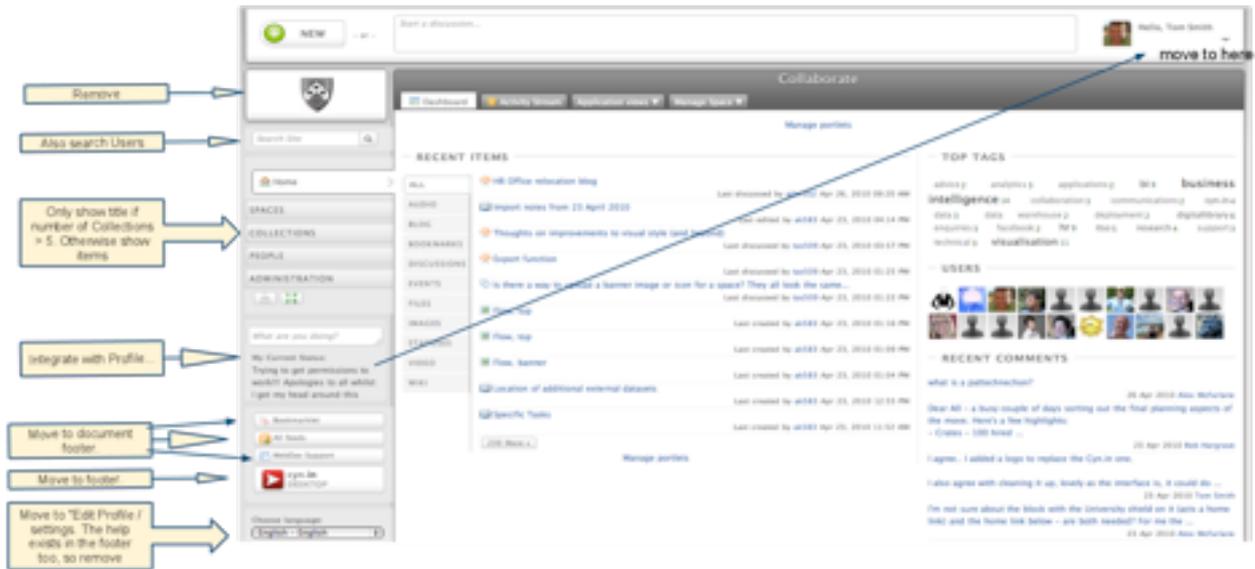
d. **Personally Important Items.** Items selected by the user. This includes people and content and Spaces. It might even just be a list of items to which they have subscribed by email.

e. **External Content and/or Gadgets.** This is about working with loosely connected systems. I am not interested in actually integrating with all the systems that we have, it would be too much work, but it would be great to be able to use a Gadget-like approach to show

Simplify The Home Screen

Comments on the existing screen.

https://docs.google.com/drawings/edit?id=1sOri1j9kk-F-S7rOpVa8XZY_gL7o_APtcZpCThf3E_M&hl=en_GB



The Profile Widget

Proposal to integrate a person's Status message with the Profile Widget area of the screen.



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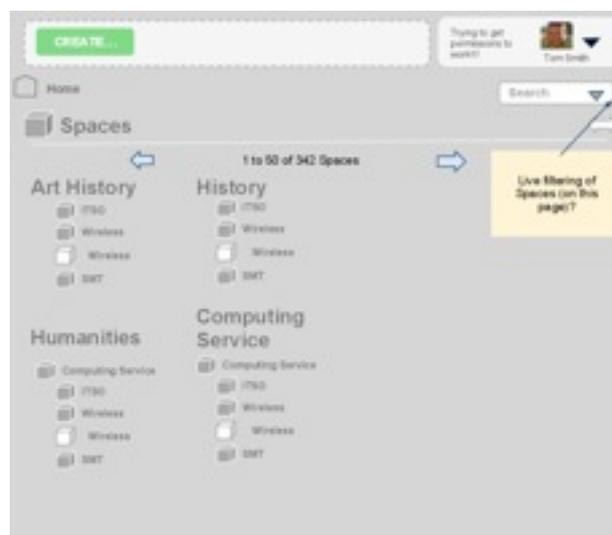
The Spaces / Site Map Page

A rough stab at a Spaces screen. On the Cyn.in Discussions Forum¹ somebody explicitly asks for sorting of Spaces. I think both sorting and arbitrary organisation of Spaces (i.e. authored perhaps into loose departments) might be important.



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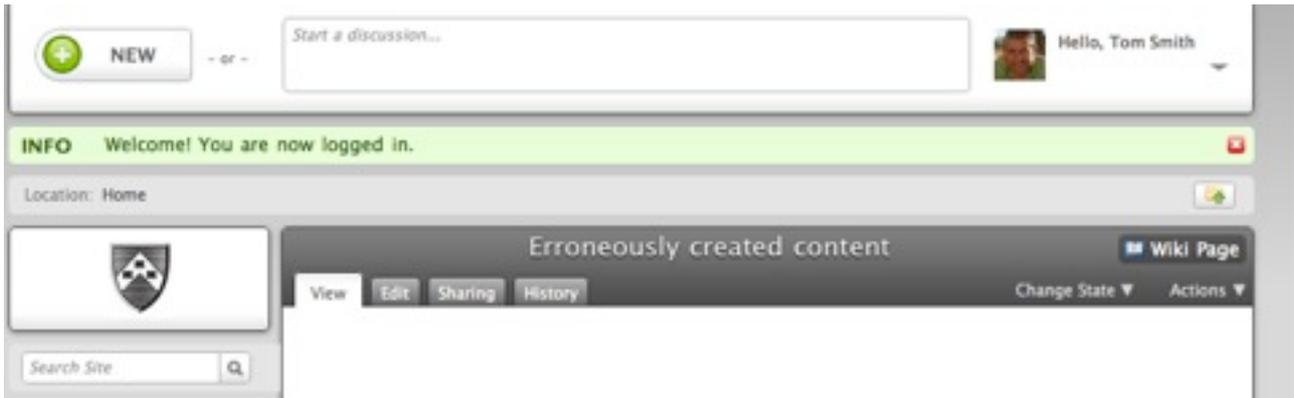
In this example, I, as the site author may create the headings such as Art History, Humanities etc and drag and drop spaces into ordered lists to create a “logical” presentation of the Spaces. Even if there were hundreds of Spaces it would be nice to be able to do this. Note: These screens might be integrated with the fancy visual Site/Mind Map visualisation as an alternative view (logical, A-Z, Visual, Recent Changes etc).



https://docs.google.com/drawings/edit?id=1jcD8f-M8k8aOsalDPdlo8pP79jXugsASqSBVqT_Uj5s&hl=en_GB

¹ <http://www.cynapse.com/community/home/cyn.in-users/help-me-please.-i-really-need-my-list-of-spaces-and-subspaces-within-spaces-to-be-sorted-by-alphabet-a-to-z-.how-can-i-dot-that>

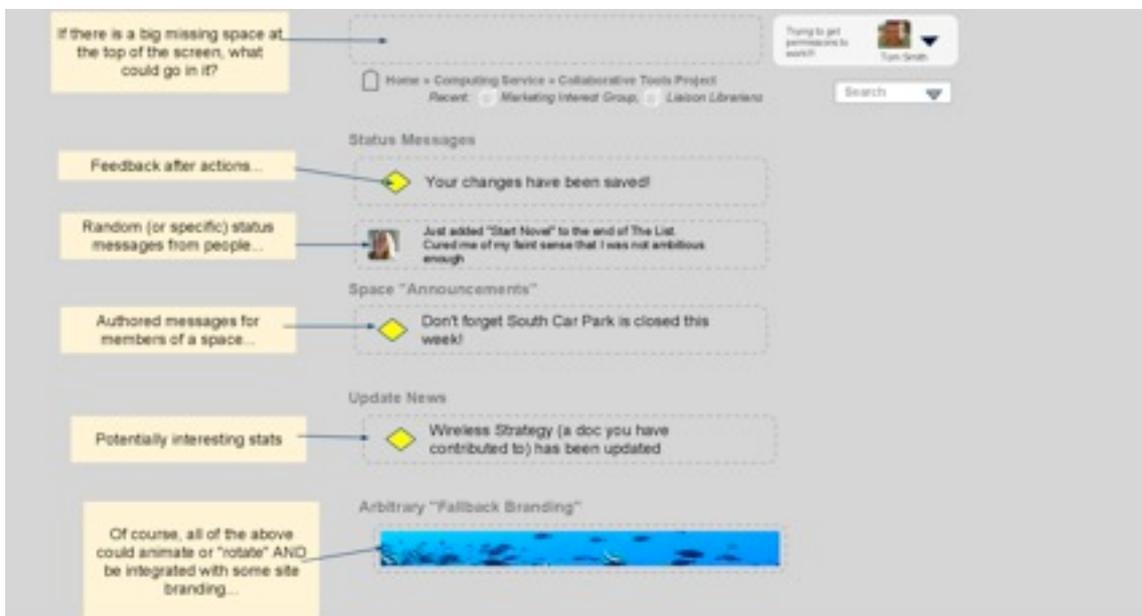
The Banner Panel



Whilst I take Dhiraj's point, that having a *Start a discussion...* form at the top (see above) and on every page encourages content creation... Our trials have proved otherwise. The observed results have been that..

- People simply didn't notice it, probably due to "Banner Blindness"².
- People assumed it was for setting one's status (that top white area does like one thing) and that the the New button is to set a new status.

I like Dhiraj's thinking, but it doesn't play out, time and time again. There seems to be two solutions. Either separate the conceptually different things, or maybe remove it all together (see below) and have this area of the screen provide a variety of *less important* functions.



https://docs.google.com/drawings/edit?id=1a-rhKJONbnej38vZQnb-VVXwfCQ2cNpWBSYAdiJ2Fh0&hl=en_GB

² <http://www.useit.com/alertbox/banner-blindness.html>

Personally Important Items...

Being able to select which items matter to you, that you can "Favourite" and appear in the Home Page would be a great addition. Already at York I am noticing people whose needs within Cyn.in are very broad-based, wanting to be free to collaborate with people across lots of different departments and other who are very focussed and only really interested in their Space or project.

Especially nowadays, no information tool is an island, but Cyn.in is weak at basic out-of-the-box integration. SocialText, Confluence and LifeRay all have varying degrees of functionality that let you pull in information from elsewhere easily.

Whether this information is an RSS feed from a public University of York news site, some Twitter content (it is being used by various departments around the university) or this week's events from a Google Calendar (also widely used)... if people are to be expected to "live, breathe and create" in a new online environment they need to be able to bring a little "information decor" with them to make themselves comfortable and productive.

Adding Gadgets (or something like them) to the Home Screen would be great, being able to add RSS feeds (or collections of RSS feeds) to a Space and then show them either fullscreen or in a portlet is ABSOLUTELY essential.

Being able to select which areas of content are important to them is a means of dealing with the Firehose Effect.

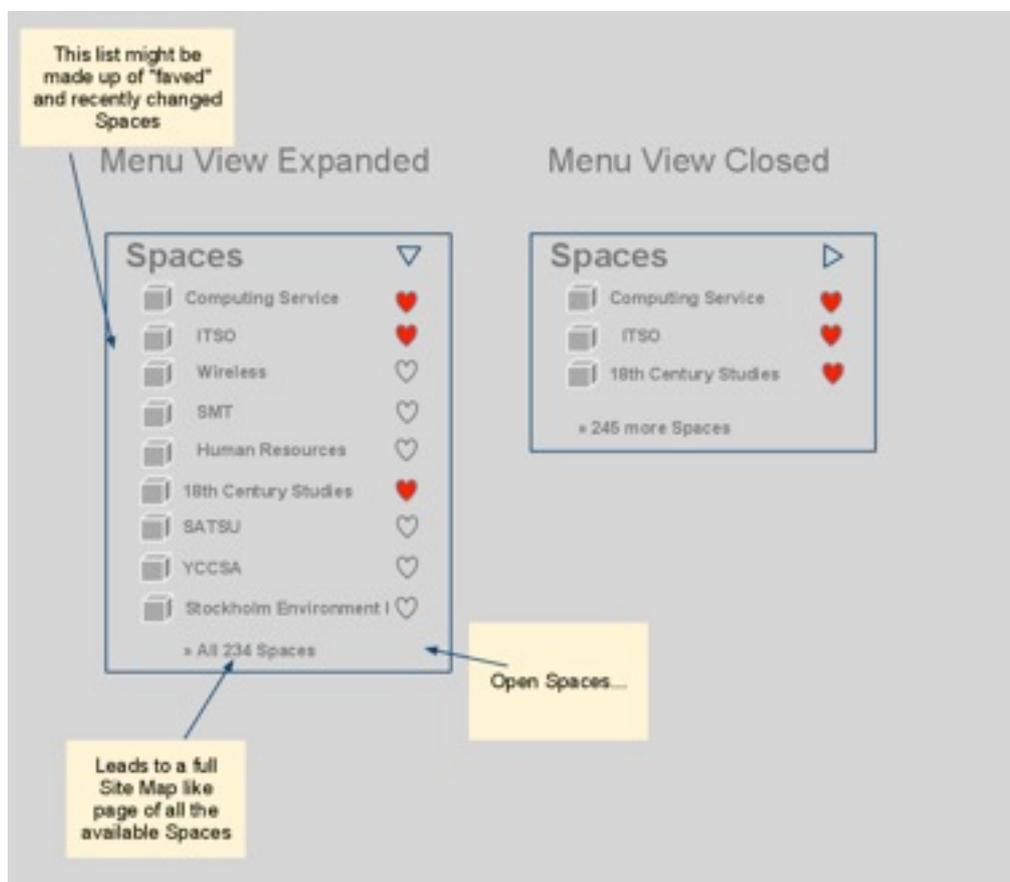
Just a thought. If there were a separate Dashboard screen, and one could select which other areas of the site were listed on it and you could choose which part of the site you land on when you first log in (from your Profile) then we may have a working solution.

The Spaces Menu

Allow The User To Shape The Interface. The Spaces menu at the Left Hand Side could, when expanded show all Spaces. But when closed only show those that have been favoured by the user (see below).

Adapt the Interface To The Amount of Content. There could be a link to take you to a page devoted only to Spaces if the number of spaces exceeds what can sensibly be shown in the menu.

Adapt the Interface To Usage. The Spaces shown in the Spaces Menu expanded might be a list of those Spaces I have most recently visited (rather than just the ones most recently created).



https://docs.google.com/drawings/edit?id=14tfvCDWx7V07qrUBH6O71dZK_w-NRA6uW7G7T0HP5dk&hl=en_GB

The MOST OBVIOUS USABILITY ISSUE

Every time I have ran a workshop where people are introduced to Cyn.in the same issue arises. People can't find the "Create" button, or assume it is part of the form at the top of the screen, or they create items in the "wrong" place. Every time! I must admit it even foxed me for a few minutes too.



Although it is easy to learn (and to teach) surely we can attempt to do something about this problem because it does put people off, people less forgiving of poor interfaces than me. For me, a truly great online collaboration tool shouldn't need any training at all, especially for the simple stuff.

I take your argument that putting a BIG FORM at the top of each page is intended to help encourage participation by making the creation of content always readily available but the results I am seeing, because people have learned to ignore the Banner area of the screen, they are ignoring the most important area of the screen.

It might be helped by visually separating the items, so they don't "read" from left to right as one item (see below).



Does this make the separate functions more obvious? One thing it does do is give more prominence to the actual page content by using less white.

Tidying Up The Home Screen

Often, the most fruitful design work is when you "start taking things out"... Whilst I like Cyn.in's interface, I think it would be nice to de-clutter the interface. In need of a tidy up is:

- The Left Hand Side Bar. There is simply "too much clutter" here in the part of the screen that "leads the eye" into the content, particularly the Spaces Menu.
- The Profile Area in the Banner.
- The Banner Area in general.
- The Location of the Create Button / Start Discussion Form.

My quick attempt to clean up the interface (i.e not the content area) of the Home Screen might look like this...



The only elements I have removed are:

1. the “Start a Discussion” form, and the white banner div
2. the Visual Mind Map tool (which I’m not a huge fan of)
3. the “Languages” drop-down, which isn’t needed on every page (it could be set on a settings
4. The “Set Status” form, which I propose could be integrated with the Profile Icon area
5. The “Home Icon” which is a clumsy way of adding branding (and replicated in the Home button anyway).

- Items such as Cyn.in Help and the Desktop app are all grouped logically in the “Cynapse footer”.
- The Webdav/ All feeds items are moved to the page’s footer items.
- Collections would appear “as themselves” and not be held in a drawer unless there were more than x.
- The People Directory is not hidden in a drawer.
- There is less *interface noise* (rounded slightly different coloured divs etc)
- I can get to a separate “Spaces” screen.
- The search form is better integrated (allegedly) and would also search for people.

Suggestion: Change “Application Views” to just “View”.

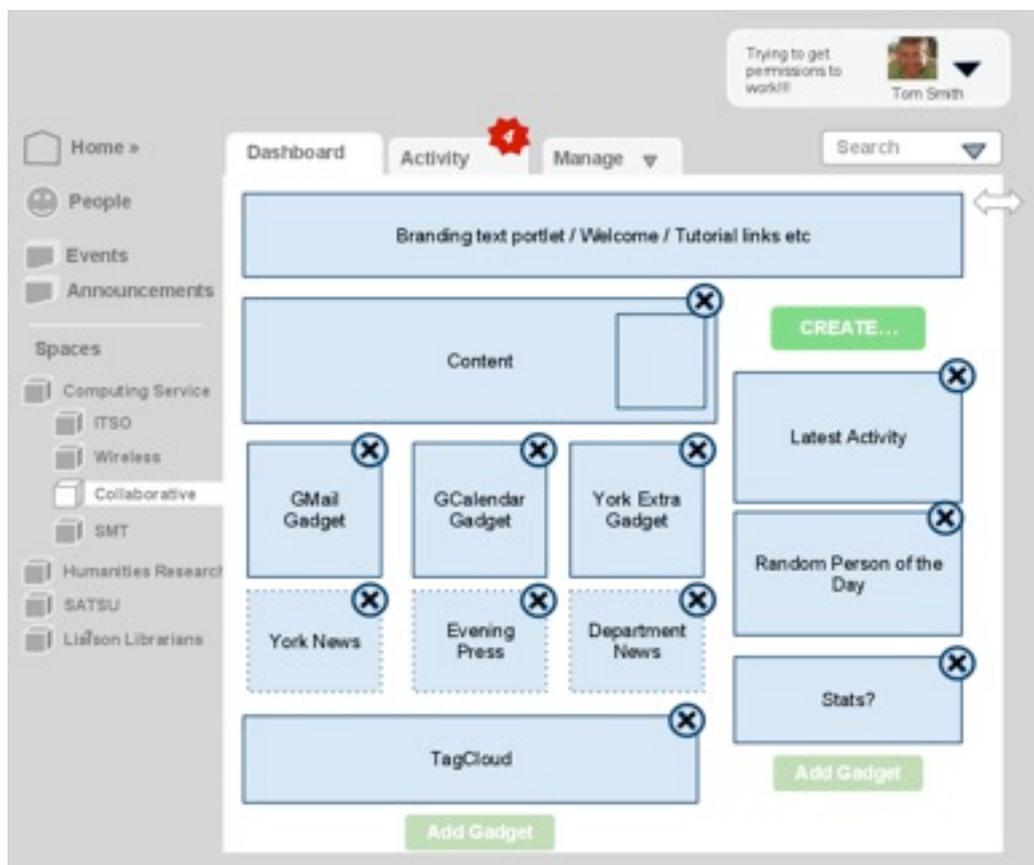
I have moved the contentious “Create...” button, to “within the content area”... I suspect if we tested this, fewer people would have an issue with it.

To Dashboard or Not To Dashboard

It's interesting that Cynapse chose to remove the Dashboard feature of Plone, because there is a need for user configuration of what appears on the Home Screen, including hopefully something like Google Gadgets.

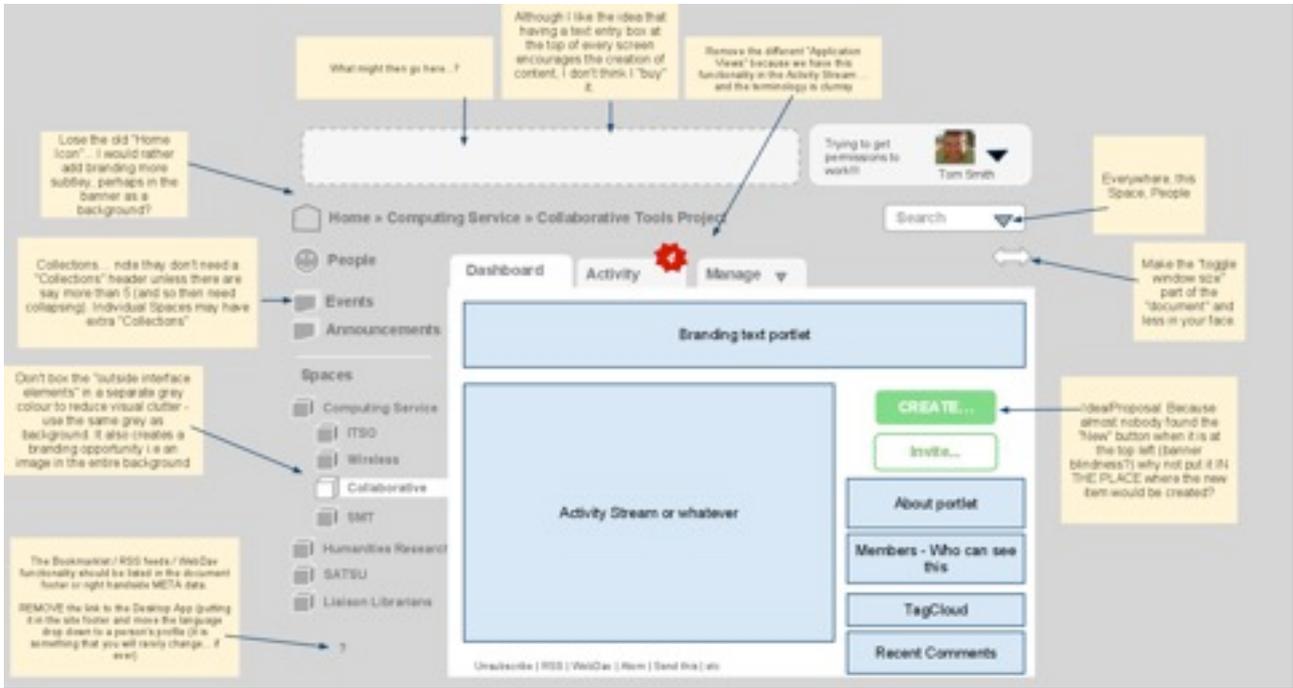
I like the idea that the Home Page would have a "Dashboard" to which people could add portlets or Gadgets. This area might be populated with "standard portlets" to begin with, such as University News, certain RSS feeds etc that then get replaced with a User's own feeds or gadgets.

This has a feel of the "Best of Both Worlds" in being to have a Home Page that is authored by the site creators, but which get's adapted by the users to suit them. One option when the site creator designs the Home Page might be to select a checkbox that says whether this portlet is "removable" or locked.



Home vs Spaces vs Documents

This was my first attempt at tidying the Space Screens... Note that "Collections" don't get a Menu holder unless they number more than X. Note the "New" button is placed closer to the content, logically where you would like to create it.



https://docs.google.com/drawings/edit?id=1Hk1dyZidTb28DiyWxKNMQY2mM9QK3KlseLbmaSvZsdQ&hl=en_GB

The Document Screen (Wide)

There is an argument for presenting less navigation when looking at a content item (a blog or a wiki or whatever).

I'd love to try a version of Cyn.in that took this approach to see if I missed having all the interface ALWAYS there. It would also help to differentiate areas of the site.

Currently, the Cyn.in interface has no "History" or "Recent Spaces" which can be a great interface design get out clause, if members typically only visit a few number of Spaces. Recent Spaces might be integrated into the Breadcrumbs bar (omitting the current Space that we are in of course).

There could be other ways of "hiding" large parts of the navigation in an animated side drawer perhaps.



https://docs.google.com/drawings/edit?id=11FyBRUoA8Y9-7jGR3soY4tn3CHNyhALVYa33ITq1WGk&hl=en_GB

The Document Screen (Squished)

This, I guess, is what a document might look like WITH left hand interface.

One aspect of Cyn.in I'm not comfortable with is how the title gets put into the background of the tabs. I think I'd like it to be in the content itself.



https://docs.google.com/drawings/edit?id=1k85C2d_oa574WCVDGVeV2pJfQZvvhZT9fa7Q23DFVo&hl=en_GB

The Membership Model

The membership model of Cyn.in is one that assumes that membership will be tightly controlled and administered by an Administrator of the site (me) and that once you are in, you are pretty much in. This Administrator might choose to wire up access control to their organisation's LDAP server.

Whilst the above model works for "closed communities" the communities we are looking to support have more of a blurry boundary. For example, one of our Use Cases is for a group of academics, some from the University of York, and a number from other universities wanting to work together collaboratively on a project bid document. Simple enough... except I really don't want the researchers to HAVE to ask for new external members to be added and I REALLY don't want to have to add, by hand all those peoples' details to get them onto the site.

Alternatively, just because a Professor from say, Southampton is working on a Sociology Project proposal with people from York they shouldn't necessarily be allow to roam free around the work and trivia within the rest of Cyn.in.

What a member at York needs is the ability to create a "Private Space" as well as a Regular Space that they can then add existing members to or invite external people as well.

Basically, when a member gets invited by a non-admin into a Space, they would get access **only to that Space**.

The Membership Hierarchy

At York we currently has unusual usernames that become our email addresses. For example I am tas509@york.ac.uk.

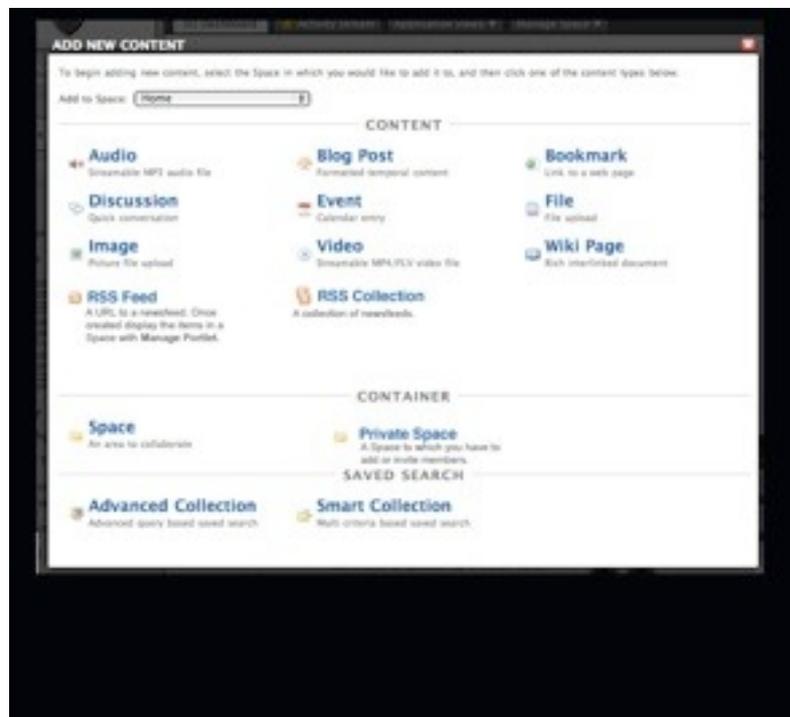
What would the implications be and would it be wise to have a cascading authentication hierarchy that went like this?

Cyn.in Users - created by hand in the Administration interface in the regular way.

York LDAP members - would these users receive email invites and would they be visible in the People Directory? What would happen if there was overlaps in usernames i.e people that have already been added to the Cyn.in Users list?

Shibboleth - this might be used particularly by collaborators at external universities. What if someone was invited to a Space using an email that already was tied to a username in our LDAP server. One way of Shibbolizing Plone is here <http://tid.ithaka.org/shibplone.pdf> , and another here, <http://plone.org/products/webserverauth> . Both put a lot of emphasis on running Plone behind Apache.

Open ID / Google Auth - this might be used for areas of the site that are open-to-the-public with very limited access and only the ability to add comments.



The Me / Us / World thing

Cyn.in seems to be extremely well suited for workgroups, but increasingly the boundaries of those workgroups, again in terms of membership gets blurry very quickly.

THE ME

For example, (and I may be wrong here) Cyn.in has a Blog object and people can go to a project Space and blog away to their heart's content but there is no real concept of a personal Blog. It would be good that if you created a Blog on your own Profile that a Blog, with the ability to customise the portlets shown on the Profile.

It would be good to be able to theme your blog content and make it publicly available. We do have a need for individuals having personal public blogs and may have to consider running Wordpress MU in parallel to Cyn.in, which is a shame.

THE WORLD

I might be wrong again, but imagine that having spent some time creating blog content, that rather than being private to the members of Cyn.in might need to be public to the world. There is no easy means of neatly bridging the gap between THE US and THE WORLD.

Another example of where this would be useful coming again from our original Use Cases is for a "Community of Practice" where the initial content starts as a project at York but develops into something where say invited members can contribute and members of the public at large can comment.

It would be interesting to explore the idea of a Community Cyn.in site that had an area that was open to Public comments but which used an external service (like Disqus or similar).

Developing in Plone / Cyn.in

It is my hope that Cynapse might consider rolling some Plone products into Cyn.in. These include...

RSS FeedMixer

This is absolutely essential, RSS is the "glue" that connects a large parts of the internet. If I could add RSS feeds into Spaces I could create an "Industry / Sector News" page, or more simply I might add a person's Blogger blog feed to the side of project Space.

Hopefully I would be able to configure how often it was fetched and (maybe) how many items to "keep" ... All, the latest 10, the latest 100 etc.

I should be able to add an RSS feed object to a Space (like any other object). It's contents would then be viewable or usable in a portlet or as an item by itself.

Anz.iJabber / XMPP / Instant Messaging Chat

Although, at first glance, this feels like an essential addition I'm very confused at how authentication might work if our install of Cyn.in isn't tied to York's LDAP server.

I have a sneaky suspicion here that I'd actually prefer a Facebook-like web-based chat system and shows when other users are logged into Cyn.in and not necessarily when they are using IM.

Collective.Geo

After successfully adding this to a vanilla install of Plone I was really pleased with how well it works and integrates with other content items, particularly with OpenStreetMap.

With Cyn.in you can already add a "Location" to Pages or Events or Blog Posts - with this tool, rather than adding "York, UK" you could alternatively add a GEO reference, like this 53.947813, -1.052939 and have all your events, blogs posts and meeting shown on a map.

Imagine how useful this would be at a large university, where typically all the buildings are unusually named with arcane references. I've been here 6 months and I'm still getting lost.

One of the Views in the Application Views menu would then become a map (see the example in a local Plone install below).

The screenshot displays the Plone web application interface. At the top, the Plone logo is on the left, and navigation links for 'site map', 'accessibility', 'contact', and 'site setup' are on the right. A search bar is located in the top right corner. Below the logo, a horizontal menu contains 'home', 'users', 'news', 'places', 'directory', 'events', and 'calendar'. The 'places' menu item is highlighted. In the top right corner of the main content area, there are links for 'admin' and 'log out'. Below the main navigation, a breadcrumb trail reads 'you are here: home → places'. The main content area is titled 'Places' and features a map of the University of York campus. The map is overlaid with a grid and includes a search bar, a search button, and a 'Manage portlets' link. To the right of the map, there is a sidebar titled 'upcoming events' which lists several events with their dates: 'Algebra Seminar: Path extension of tiling semigroups' (May 17, 2010), 'Mathematical Physics Seminar: Probability distributions for measurements of smeared quantum fields' (May 18, 2010), 'Other Talks: Study Semigroup: Transformation semigroups and representations' (May 18, 2010), and 'Using Multiple Methods to Evaluate the Impact of a Theory-based Intervention upon Community Mental Health Professionals Adoption of National Suicide Prevention Guideline' (ARRC Auditorium A/RC/014, May 19, 2010).

Faculty Staff Directory

Whilst FSD³ is great, it maybe is too academically focussed for my needs. I imagine my first tranche of users will come mainly from dispersed non-academic staff wanting to work together rather than academic staff who work in the same physical building.

FSD does have a neat way to add extra fields, defining what field types they are and what widgets you can use to edit them.

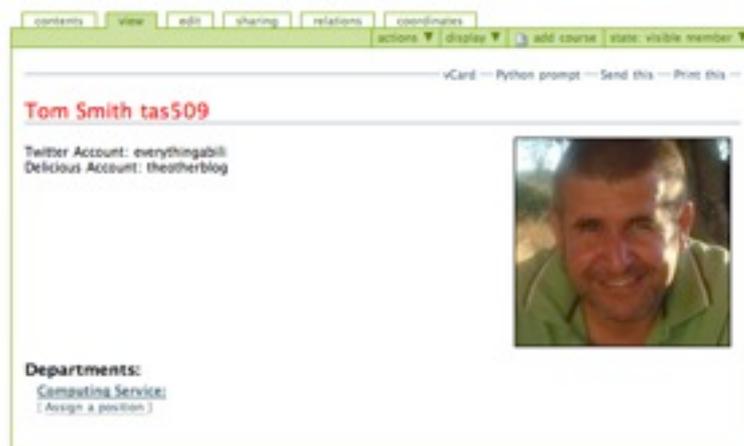
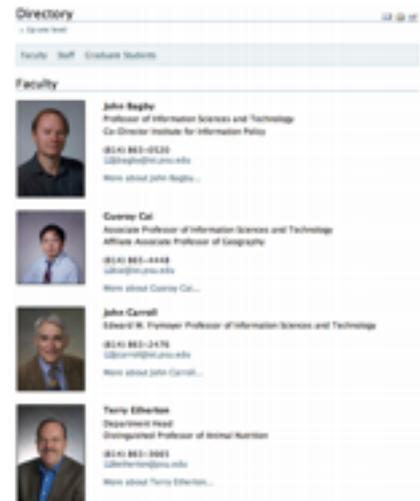
FSD also has alternative ways to browse the Users on a site. I think Cyn.in could learn from both these very cool innovations.

The REAL NEED here I have is to be able to extend the "slots" in a person's profile. And again, this has to do with connecting people and content into the wider world of the internet.

I'd like to be able to add fields for...

- More blogs and web page URLs. Adding a blog might then create a portlet that can show my blog items on my profile.
- Other Social Network memberships, such as LinkedIn, Academia.edu etc
- RSS feeds (to show the contents on a person's profile)
- A person's Twitter name, again with say the last three tweets (or maybe with the option to wire it up to a person's Status message)
- A person's Delicious username. Showing the last 10 bookmarks?
- Unlimited File fields for CVs etc.

Using FSDs extension dict, we quickly added the ability to add Twitter and Delicious usernames to a Profile (see below). Of course it would then be more work to go and get the latest tweets and bookmarks.



³ <http://plone.org/products/faculty-staff-directory/>

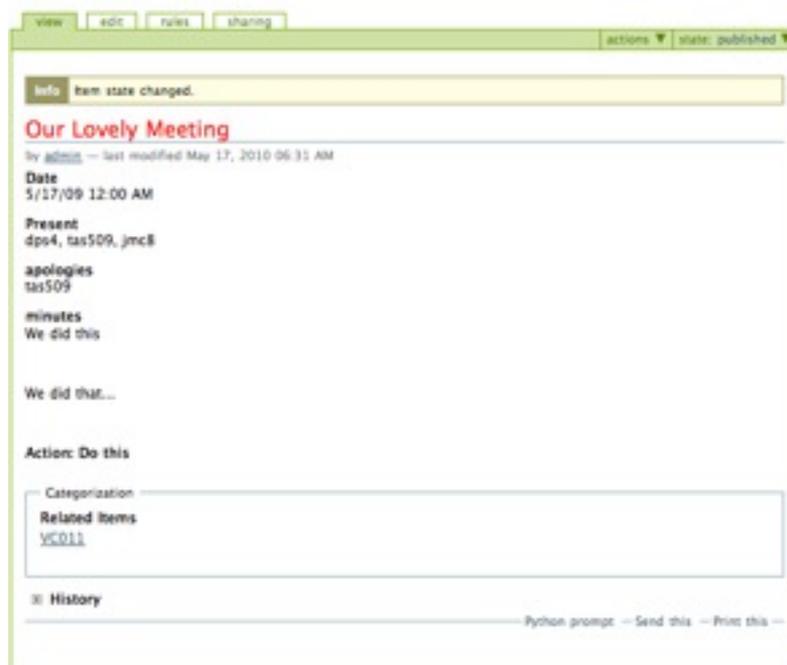
The Means To Create New Content Types

The ability to create a “Case Study” or a “Meeting Minutes”, “Life Story”, “DVD” or a “Software Description” object would be really handy.

This might also include a content type that had a Latex formatted area perhaps? Or would a Latex doc (that emitted images) be a better approach?

Dexterity might be the thing. <http://plone.org/products/dexterity> (see below). Using the Plone interface I quickly created a simple Meeting Minutes content type that has a Date/ Present/Apologies/Text fields. I added my room as a related item (which is a link to a Wiki Page that has its coordinates set and so shows a map).

I could imagine that in the Create an Item Panel, that as well as been a Wiki Page there might be a “Create from Template” button, which would then show a list of the available Content Types.



Specific Requests and Products

AnonymousCommenting. There is a Product which allows non-logged in members to comment on items, but alternatively I would like logged in members to be able, in certain circumstances to comment anonymously.

Idea: A brainstorming tool wouldn't go amiss either, where comments can be added but not attributed to anyone in particular.

PloneGlossary. This Product seems to be poorly maintained. I would love to be able to create a folder of say Wiki Pages, whose ids were acronyms (SIPIG, DPS4 and YCCSA for example) and then for those ids to be search for in any document. Having played with automatic parsing and linking before (and had it fail) a better approach might be to "Suggest" linked items in the META data area of the screen called "See Alsos".

It would also look for peoples' usernames such as dps4 or tas509. This would make the creation of meeting minutes and project notes much more navigable without requiring the user to do anything.

PloneTransforms, to PDF, Word, RTF etc. Would be a **very nice to have**.

wsapi4plone. From the same people that created FSD, there is a product called wsapi4plone.core that enables me to, from another computer, log on to Plone and arbitrarily walk or create objects. This, for me, is a fantastic way to simply integrate Cyn.in with other systems. I might have a page called "System Status" that I update the text of once a day. I have already created an events crawler that creates Plone events in a Plone folder.

Is wsapi4plone the best means of achieving this? Could it be included by default but not enabled?

Bugs / Fixes Small Tips / Usability Requests

Time drop down in Events is a mess. Can we also have "All day" events rather than HAVING to enter a time.

Activity screen, no idea of location of the content items... it would be nice to perhaps have a rollover that went "Computing Service >> Itso..." to show where the item originates.

When switching to the full size WYWIWYG editor in IE8 some of the DIVs don't get hidden properly.

Subscribe by iCal in the Calendar view would be nice.

When adding User(s) it would be nice to be able to add a personal message.

When have added a user it would be nice to be able to add user and be returned to the Add user form.