

## **Working Copy of the MEASURE Evaluation Phase II Website Functional Specification**

Justin Watt

### **Overview**

The MEASURE Evaluation Phase II website is intended to disseminate integrated information about MEASURE's activities, publications, trainings, contacts, and finances and to collect information from authorized users on the project's finances and activities. It will support collaboration between users by facilitating the sharing and exchange of administrative and technical project information.

### **User Groups and Needs**

#### *General Public*

The General Public should be able to search for and download publications, peruse MEASURE's activities and trainings around the world, and access limited contact information. The General Public will have no access to MEASURE's finances online or any other resource requiring a userid and password.

#### *MEASURE Staff (UNC, JSI, Macro, Tulane, Futures, USAID)*

When logged in, members of MEASURE Staff will be able to access financial information summarized by activity or account and detailed contact information of other MEASURE Staff. MEASURE Staff will be able to update their own contact information, as well as the status of activities of which they are one of the leads.

#### *UNC Admin Staff (a subset of MEASURE Staff)*

Members of UNC's Admin Staff will be able to access all financial reports and update all contact and activity status information, add/modify/remove activities, publications, and trainings.

#### *UNC Fiscal Staff (a subset of UNC Admin Staff)*

UNC Fiscal Staff will be able to add/update/remove all fiscal information including expenses, personnel allocations, expense allocations, obligations, activity funding and account budgeting, accounts, regions, object codes, etc. Members of UNC Fiscal Staff will also have complete access to Tulane's Online Financial Information System.

#### *UNC Web Staff (a subset of UNC Admin Staff)*

The members of UNC Web Staff will have complete access to the website, including utilities for web user-management.

#### *JSI, Macro, Tulane, TFGI Admin Staff (a subset of MEASURE Staff)*

The Admin Staff of JSI, Macro, Tulane, and TFGI will each be able to add/update/remove their own monthly expense summaries by activity. Tulane Admin Staff will have access to Tulane's Online Financial Information System.

### Sample Homepage Layout

The MEASURE Evaluation homepage should inform to the webuser that they are viewing a professional website for the MEASURE Evaluation Project. This will be conveyed using a simple and crisp graphically designed page template, integrating the header and logo, the navigation sidebar, and the footer described below. This may also include a custom domain name (e.g. <http://www.measure-evaluation.org>)

The homepage should provide a means for authorized users to enter their userid and password for logging in. Once logged in, the homepage header should give the user feedback that they are logged in (perhaps listing the user's name and a "Log Out" button). There also should be a "forgot your password" link that opens a page to have the user's password emailed to their primary email account.

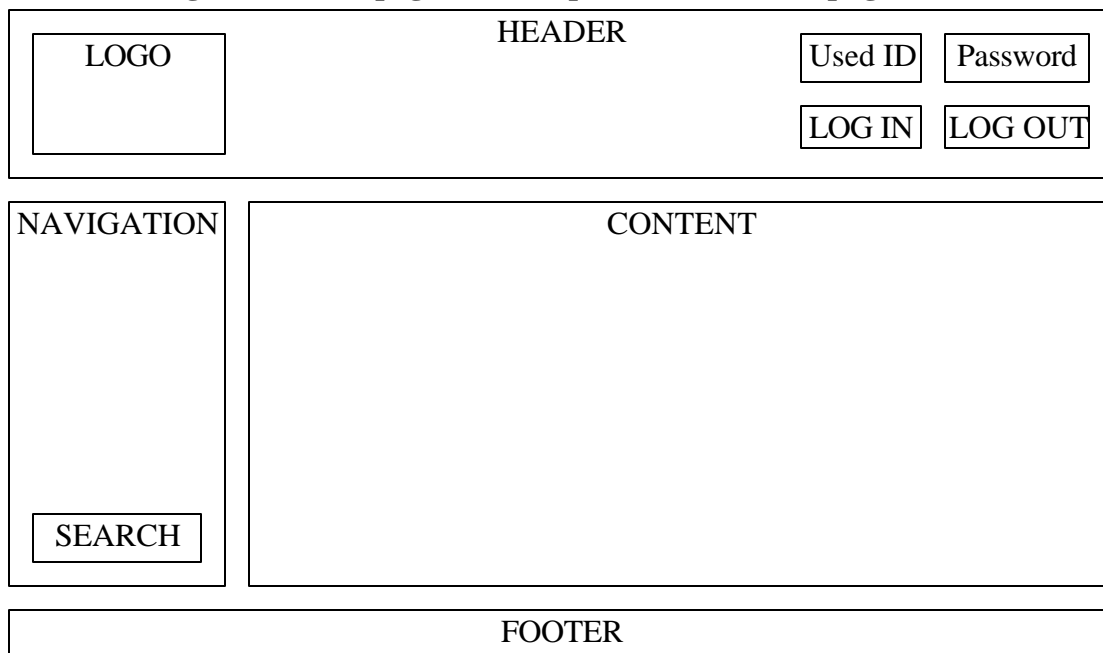
There should be a navigational sidebar with links to the main functional areas of the site, including publications, activities, trainings, people, and finances as well as a search box.

There should be a boilerplate footer at the bottom of the site with appropriate copyright information, and links to a static "About MEASURE" page and a "Contact Us" page.

The remaining page content should be filled with the most recent MEASURE Evaluation news items, including newly added publications, upcoming trainings, conferences, meetings, site updates, etc. The content will be displayed in reverse chronological order, with links for archived news items.

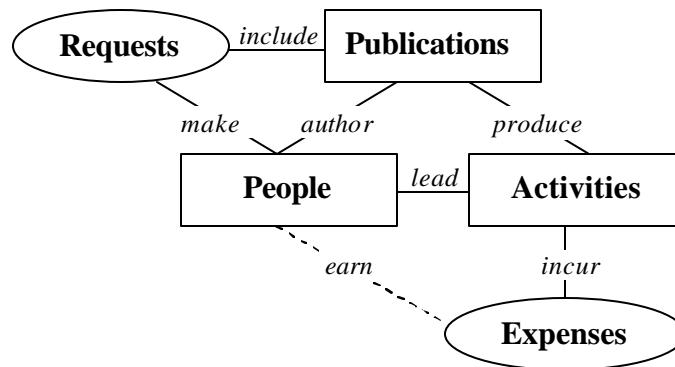
The four major components of the homepage will serve as a template across all pages. Only the content area will change substantially as the user browses the site

### Wireframe diagram of homepage (and template for all future pages)



## Website Organization

The MEASURE Evaluation Phase II website can be thought of as containing three main categories of inter-related items: Publications, Activities, and People (whereas the Phase I website contained static information primarily on publications). For the purposes of this specification, a publication should be considered synonymous with a "product." Thus a publication might include a survey, a trip report, a working paper, a presentation, a dataset, etc. even though they are not all "publications" in the strictest sense. The Phase II website will streamline the request of hardcopy publications by allowing people to submit their requests online.



The Phase II website will depart from the Phase I site, by including information on Measure's related Activities and People (or contacts). An Activity has many different meanings and intentions within Measure, depending on the context in which it is used and the intent of its creation. Most importantly, activities provide discrete **containers/identifiers/areas/regions?** for organizational and fiscal planning, from technical assistance, to trainings, to research, to project administration. The website will be used to track and update the progress of each activity's defined tasks.

The relationship of People to Measure's publications and activities is both informative and critically important to the proper functionality of those areas of the site that require authorization to access (e.g. only certain individuals should be able to update an activity's status). Some information about individual people will only be accessible to authorized users.

The final major component of the website is the Fiscal system, which will be closely coupled to the Activities component. From this vantage an activity can be seen as a "cost center" with many related expenses, fund items, and budget items. Fiscal information should only be accessible to MEASURE Staff, and expense item reports (which may contain UNC salary information) will only be accessible UNC Admin Staff.

## The Publications Component

- A. Navigate/filter/search list of publications
  - 1. by publication type
  - 2. by subject area
  - 3. by country
  - 4. by language
  - 5. by author
  - 6. by activity
  - 7. by date added (to website)
  - 8. by number downloaded/requested
  - 9. by keyword
  - 10. by Phase I vs. Phase II
- B. Review individual publication details
- C. Add/update/delete publication, merge duplicate publications
- D. View/download publication
- E. Request hardcopy of publication (if available)
- F. Capture/view publication download and request statistics
- G. Trip Reports (traveler(s), primary country, site(s) visited, time period, desc)

The main page for the Publications component should include several methods for users to find a publication or publications if they already know exactly what they're looking for. The majority of the page should display links to (and pictures if applicable) of the five publications most recently added to the website. A user should be able to retrieve a list of publications by type, subject area, country, language, author, activity, date added, popularity (number downloaded/requested), and keyword search. The results generated by these lists should include appropriate descriptions and iconography describing whether the publication is Phase I or Phase II, available for hardcopy distribution, and/or available for immediate viewing/downloading.

There should be a webpage for every publication with a simple and standard URL, to facilitate dissemination via email, inbound linking, etc. The unique codes used for every publication should be taken advantage of here. This is complicated by certain special case publications. Some discrete publications are commonly grouped together, so there for there needs to be a mechanism to support these "meta-publications". Perhaps this can be achieved by including a "related publications feature" on every publications page. Similarly, some publications are so large that they are available in multiple files, so there also needs to be a mechanism (such as a table of contents page) to support "chunked publications."

The webpage for an individual publication should include a cover image if applicable, the title, the publication code, links to the authors, a link to the source activity, links to any translations of the publication, a description or abstract, relevant dates, bibliographic info, related publications, etc. The same iconography used on the publication search results should be used on the individual publication pages.

Every click on a link to view/download a publication or submission of a publication request should be tracked for generating the most commonly downloaded publications list as well as for internal tracking purposes.

Trip reports are a special kind of web-only "publication" not intended for download or distribution, with specialized fields including the traveler(s), the primary country/site(s) visited, the time period, and a description.

When logged in, authorized users should have the ability to update the current publication record, add a new publication, and view information about the current publication's distribution dates and dissemination statistics.

As soon as a publication is conceptualized and attached to an activity, it should be assigned a code and entered into the website. These proto-publications should not be available to the public until they are indicated as such. However, they should appear to authorized users (perhaps only via the Activity component) for the purpose of tracking the progress of publications in the works.

### **Publication Requests ("My Request List")**

- A. Request hardcopy of publication (if available)
- B. Manage request list (revise quantities, remove publications)
- C. Enter contact info (Create publication request account?), submit request
- D. Fill publication requests, generate mailing labels, send notification email

From either the publication list or individual publication pages, the user should be able to easily add a publication to his/her "request list" much like a shopping cart in traditional e-commerce sites. The site should provide some sort of feedback that a publication has been added to the request list, perhaps with an icon in the page header. Once the user has requested all relevant publications, clicking this icon should bring the user to a page where quantities can be adjusted, and address information entered, before the request is submitted.

There could be a mechanism to create accounts for people who request publications so they do not have to constantly enter in their contact information (and so that we can track them and their requests easier) a la Amazon.com.

Authorized admin staff users should receive daily email updates when publications have been requested, or when publications are first available for distribution, requiring several standard requests based on publication type. Thus the admin staff would use the website to "fill" the requests, mark them as filled, and print mailing labels. Once a request is marked as filled, the website will send an email to the requestor with the appropriate tracking info.

## The Activities Component

- A. Navigate/filter/search list of activities
- B. Review individual activity details
- C. Add/update/delete activity (duplicate record management)
- D. Add/update/delete activity tasks
- E. Review activity's publications (including trip reports)
- F. Generate workplan/semi-annual report as PDF
- G. Trainings (isn't this just a subset of the activities?)
- H. PIMS?

Information about activities will be relevant primarily to MEASURE Staff and web users looking for more detail about what Measure does. The main Activities page should provide appropriate navigational aids, by activity code, name, lead partner, activity category, status, keyword search, etc., so that users can quickly access the activity they're looking for.

The information tracked about each activity has evolved over time, so this list of fields may change. In the past an activity has been composed of a code, name start/end dates, activity category, activity status, objective, description, leads, technical advisor, lead partner, collaborating institutions, locations of activity, results (perhaps with percentage breakdown), strategic objectives, and multiple tasks and their statuses. It needs to be determined which of this information will be available to the public, and which will remain accessible only to authorized users.

When UNC Admin Staff are logged in, they will be able to make changes to any information tracked about an activity. MEASURE Staff who are also the leads of activities will be able to add, update and delete the various tasks and task statuses for their activities.

Just as with publications, every activity should have a single webpage with a simple and standard URL, using the unique activity code. The information displayed on the page will depend in part on whether the user is logged in and what type of user they are. In addition to the information specific to the activity, the user will also be able to see that activity's publications (with links) including trip reports.

Trainings are a special category of activities that may need to be highlighted on the website (similar to trip reports). Trainings can be divided into several categories (master's programs, regional workshops, etc) and may have information associated with them such as application materials that would also need to be highlighted. Since activities are used so predominantly for administrative and financial purposes, it may be more efficacious to create a new object called an "Event" that would include things like trainings and other announcements that show up on the homepage in blog fashion.

## **The People Component**

- A. Navigate/filter/search list of people (name, title, email, phone number, photo?)
  - 1. MEASURE staff contacts (UNC, JSI, Macro, Tulane, TFGI, USAID)
  - 2. Publication requestors
  - 3. Others
- B. Review person details
- C. Add/update/delete person (duplicate record management)
- D. Include organizational contact info?
- E. Manage user groups for website access

The main People page should include a list of the essential contact information for the members of MEASURE Staff, by organization (UNC, JSI, Macro, Tulane, TFGI, USAID). Essential contact information includes full name, title, email address, and work phone number. Authorized users will be able to search the entire contacts list and get detailed information about each individual, including work/home address info, notes, publications authored, and activities led. Authorized users will be able to update their own contact info, as well as the password they use to login to the website. UNC Admin staff will have access to add/update/delete any person and check the status on individual pub requests. UNC Web Staff will be able to manage users assignments to groups relevant to authorized web access.

## Outline of Authorized-Access Website Features

Whereas Microsoft Access was the primary tool for organizing and disseminating administrative information in the past, the website will be the primary tool in Phase II. The most substantial addition to the MEASURE "web presence" will be the inclusion of MEASURE's fiscal information on the website, accessible to authorized users. Not only will the website serve as the point of dissemination of that information, it will be the means in which that information is created and updated.

### I. UNC Fiscal Data Entry (UNC Admin Staff Only, except C)

- A. UNC expenditures (automatic?)
- B. Activity coding/reconciling
  - 1. UNC main account 5-35501
    - a. non-personnel
    - b. personnel
  - 2. UNC major subcontracts? (see C)
    - a. 5-35502 JSI
    - b. 5-35503 Macro
    - c. 5-35504 Tulane
    - d. 5-35505 TFGI
  - 3. UNC minor subcontracts 5-35506 and up
- C. Major sub monthly expenditures by activity (JSI, Macro, Tulane, TFGI)
- D. USAID obligations (amount, year, mod, place, type, objective, etc)
- E. Activity funding (associating activities with [pieces of] obligations)
  - 1. limit fund items to specific account(s)
- F. Account budgeting (budgeting funds to accounts for specific activities)
- G. Add new accounts, optionally defaulting to single activity
  - 1. Update account's default activity
  - 2. Move all account expenses to new activity
- H. Add/update object codes
- I. Add/update regions

### II. UNC Fiscal Data Output

- A. Filter on account(s), activity(ies), date range
- B. Activity Totals (optionally group by account)
- C. Account Totals (optionally group by activity)
- D. Line Items (optionally group by activity or account, UNC Staff Only)
- E. Misc (personnel reports, revenue reports...)
- F. Dynamic generation of print-worthy PDFs

### III Tulane Financial Information System (Tulane and UNC Admin Staff)