ConnectED CMR: Bulk Registration & Maintenance

User Interaction Design Specifications

Draft v1.0

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Revision Chart

This chart contains a history of the document's revisions.

Version	Primary Author	Description of Version	Date Completed
1.0	Mike Earley	Initial Draft	02/23/09

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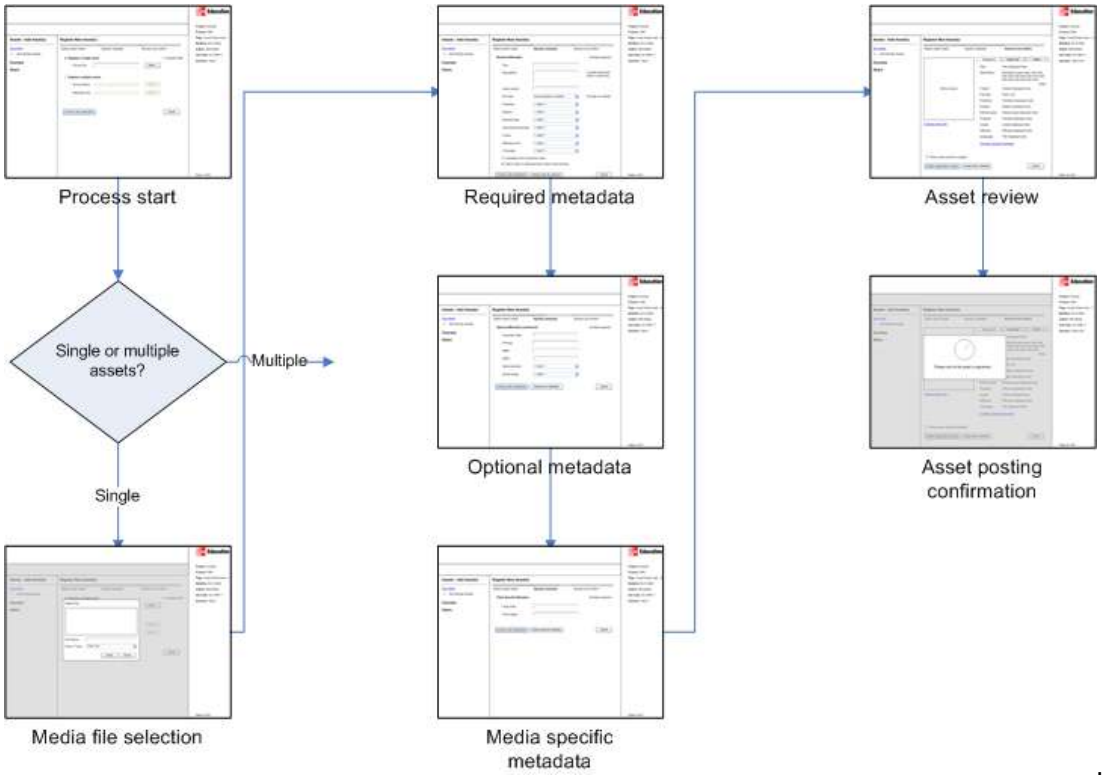

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1 Global Concepts

1.1 Global navigation

The global navigation functions as described in the application style guide under the section “CMR Navigation Scheme”. To begin the registration of a new batch of simple assets the user selects “Assets” from the first-level menu, and then selects “Add Multiple Assets” from the second-level menu.

Navigation between steps is facilitated with buttons that also adhere to the style guide.

1.2 Canceling the process

There are two ways a user can, at any time, cancel the process of registering multiple simple assets. The first is by clicking the “Cancel” button available on each screen. Doing so will navigate the user back to whichever screen they were looking at immediately preceding their selection to add multiple simple assets.

Clicking the “Up a level” link in the left-hand navigation space will navigate the user to the first-level navigation for Assets. By stepping out of the process and navigating to another location within the site, the user implicitly cancels the process of adding multiple simple assets to the system.

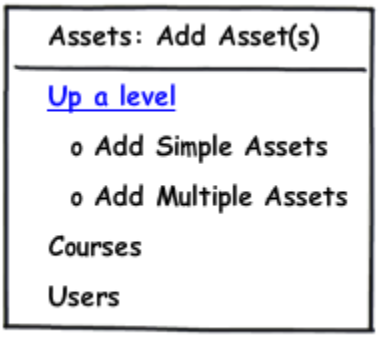

Figure 1. Global navigation

2 Registering Multiple Assets

2.1 Screen flow

This diagram illustrates the number of steps a user will see when going through the process of registering multiple simple assets.

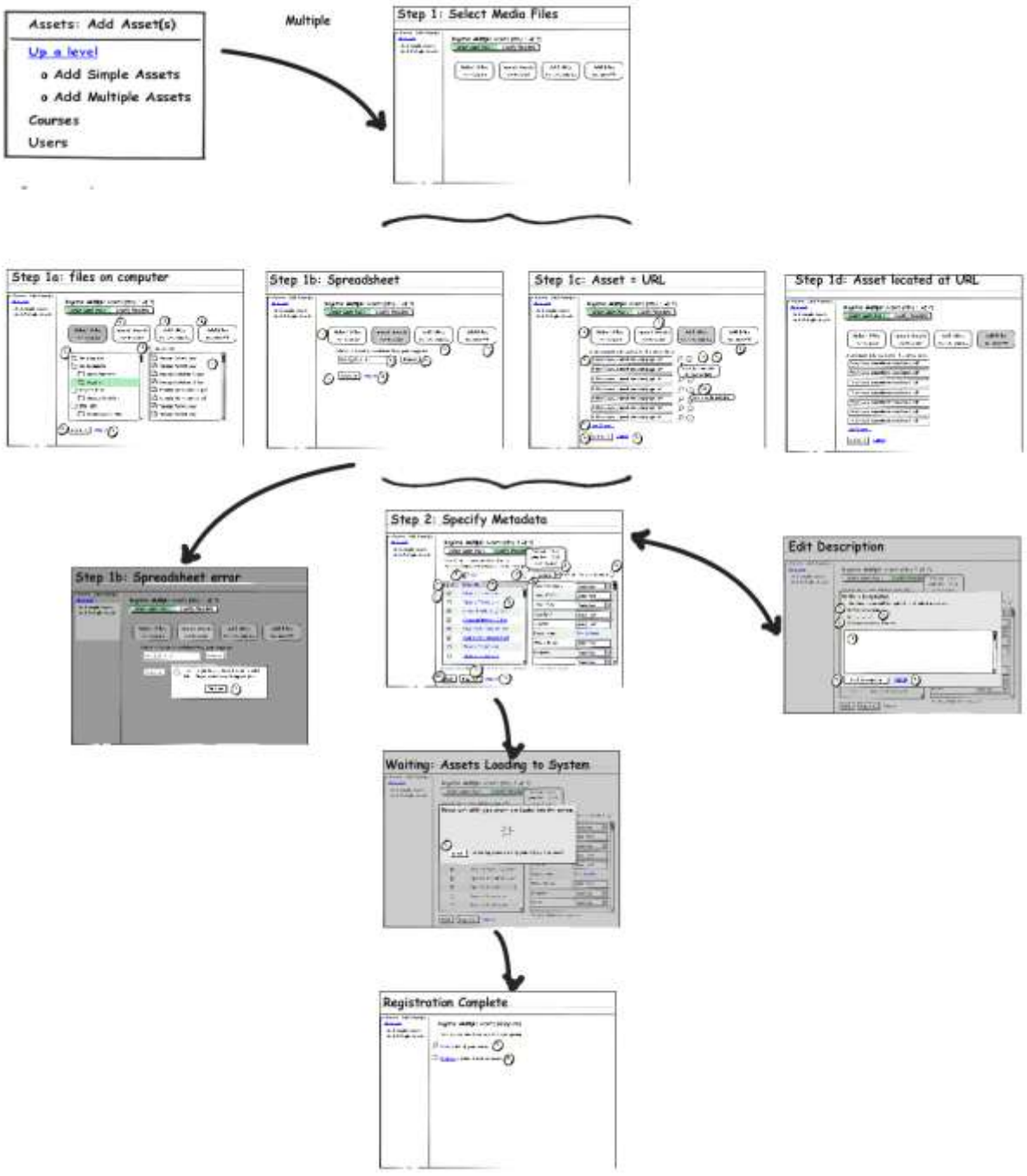

Figure 2. Process screen flow

2.2 Starting screen

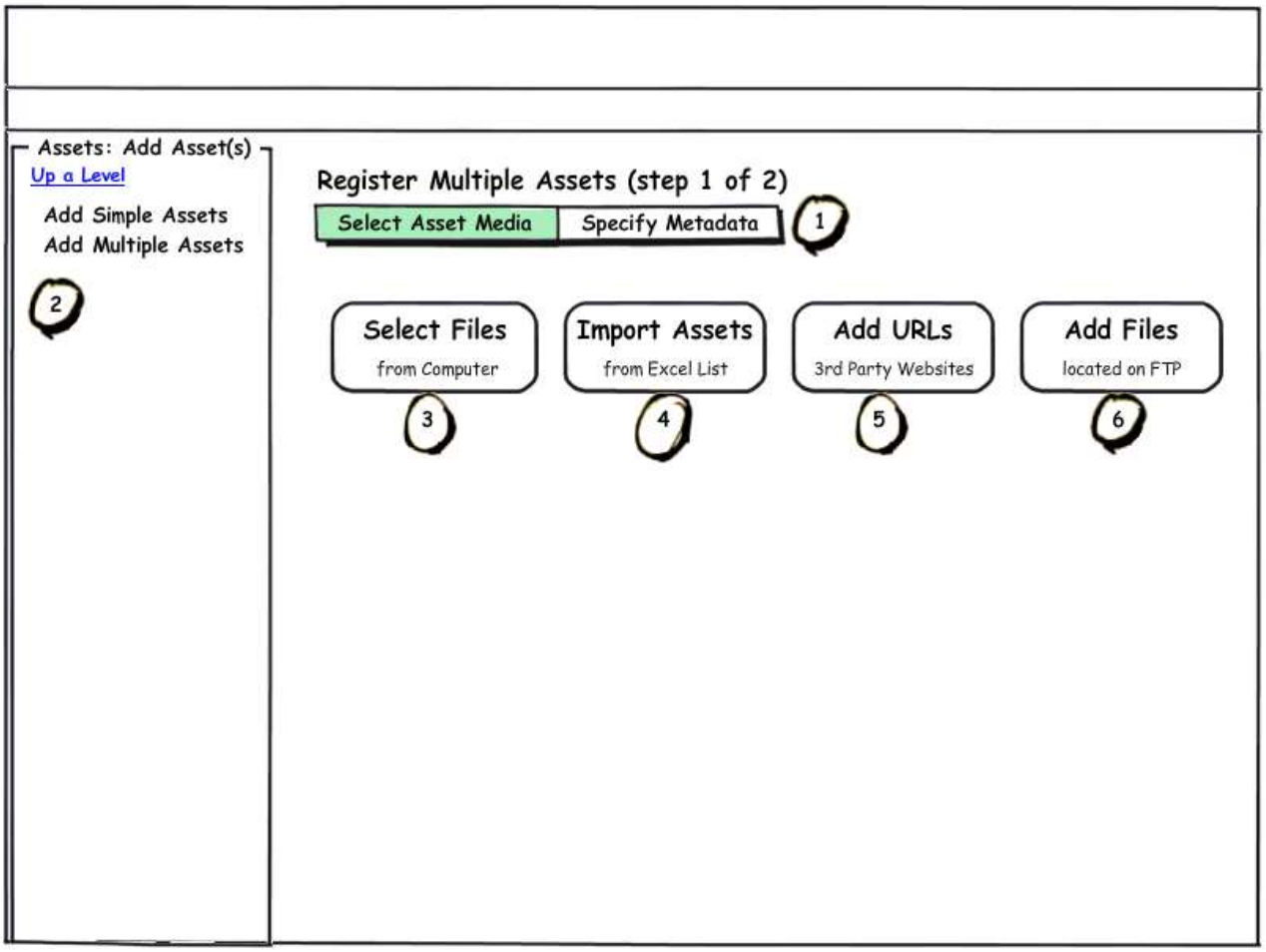

Figure 3. Starting screen

2.2.1 Navigation elements

ID	Name	Destination	Description
2	Left Hand Navigation	Multiple	Left-hand navigation allows the user to navigate through the application. Functionality is defined in style guide.
3	Select Files from Computer	State Change – Show Files on My Computer State	Clicking this button changes the state of the page; it will display the 'browser' and 'selected files' interfaces, as well as the continue/cancel buttons, on this same page
4	Import Assets from Excel List	State Change – Show Import Assets from Excel State	Clicking this button changes the state of the page; it will display the 'select excel file' interface, as well as the continue/cancel buttons, on this same page
5	Add URLs (3rd Party Websites)	State Change – Show Add URLs state	Clicking this button changes the state of the page; it will display the 'Input Website Addresses' interface, as well as the continue/cancel buttons, on this same page
6	Add Files (Located on an FTP)	State Change – Show Add Files from Server State	Clicking this button changes the state of the page; it will display the 'Input FTP Addresses' interface, as well as the continue/cancel buttons, on this same page

2.2.2 Other elements

ID	Name	Type	Validation	Description
1	Progress Display	Text and Visual	n/a	Displays the relative position of the user in the overall process; functions as defined in the style guide

2.2.3 Error messages

Not applicable.

2.3 Files on My Computer

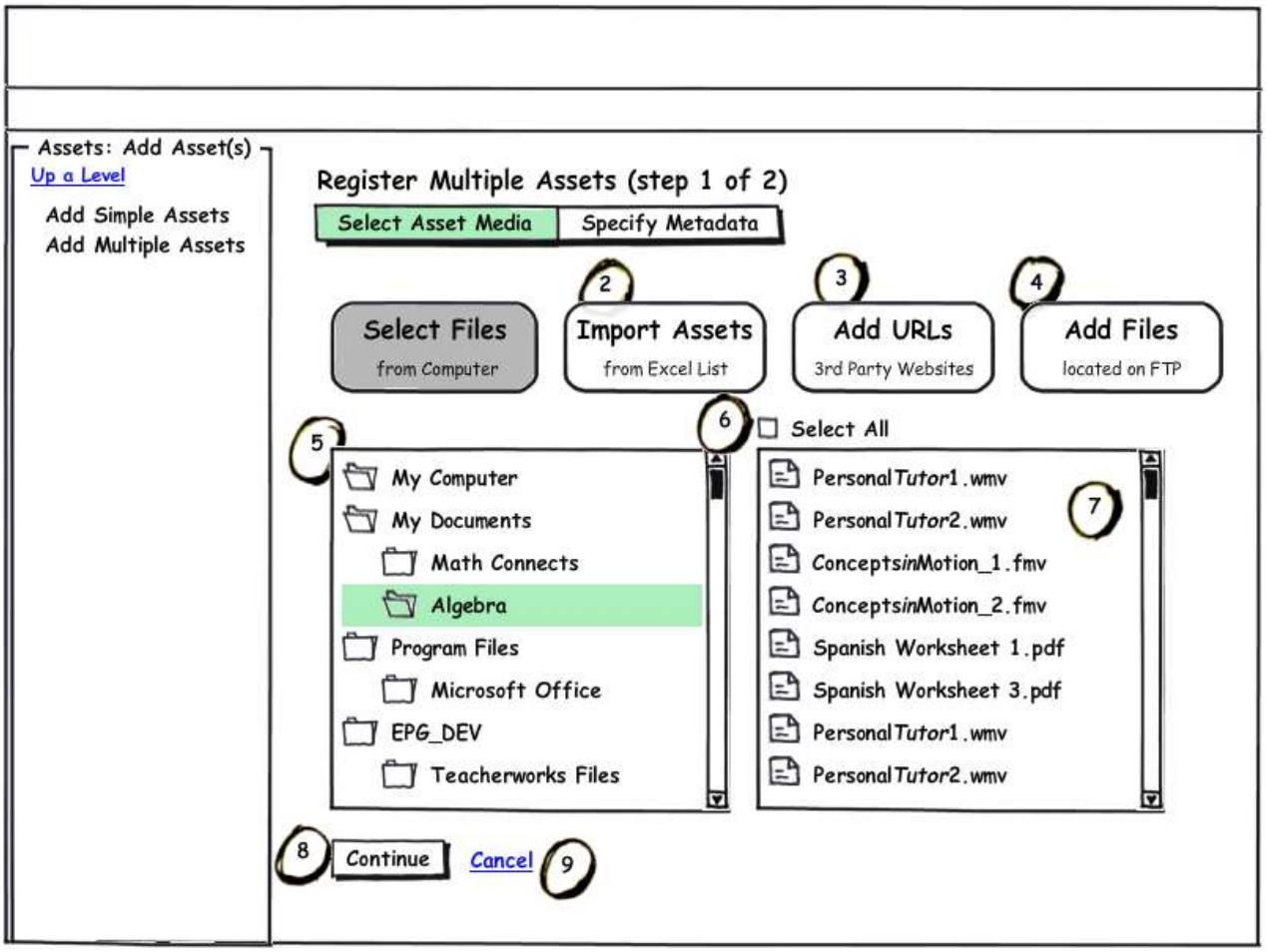

Figure 4. Files on My Computer dialog

2.3.1 Navigation Elements

ID	Name	Destination	Description
2	Import Assets from Excel List	State Change – Show Import Assets from Excel State	Clicking this button changes the state of the page; it will display the 'select excel file' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
3	Add URLs (3rd Party Websites)	State Change – Show Add URLs state	Clicking this button changes the state of the page; it will display the 'Input Website Addresses' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
4	Add Files (Located on an FTP)	State Change – Show Add Files from Server State	Clicking this button changes the state of the page; it will display the 'Input FTP Addresses' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
8	Continue	Specify Metadata	Clicking this button causes the registration process to continue, first validating that source media has been chosen and validating on the back-end that it is an understood media type. If any of these checks fail, the user returns to this screen with error information indicated. Errors are displayed as defined in the style guide.
9	Cancel	Page most recent prior to starting the registration	Clicking this button discards all data related to the process up to this point and navigates back to the most recent page preceding the initiation of the process.

		process	

2.3.2 Other Elements

ID	Name	Type	Validation	Description
5	File Explorer	Browser Control	n/a	Standard web control that allows user to access all files on 'Computer', including any networked drives that are currently accessible
6	Select All	Checkbox	n/a	When clicked, automatically selects all files in the File Selector Control
7	File Selector	Multi-Select List Box	n/a	Allows user to select one or more files in a folder; standard controls include 'ctrl-click' to select more than one file, or 'shift-click' to select a group of contiguous files

2.3.3 Error Messages

Not applicable.

2.4 Import Spreadsheet

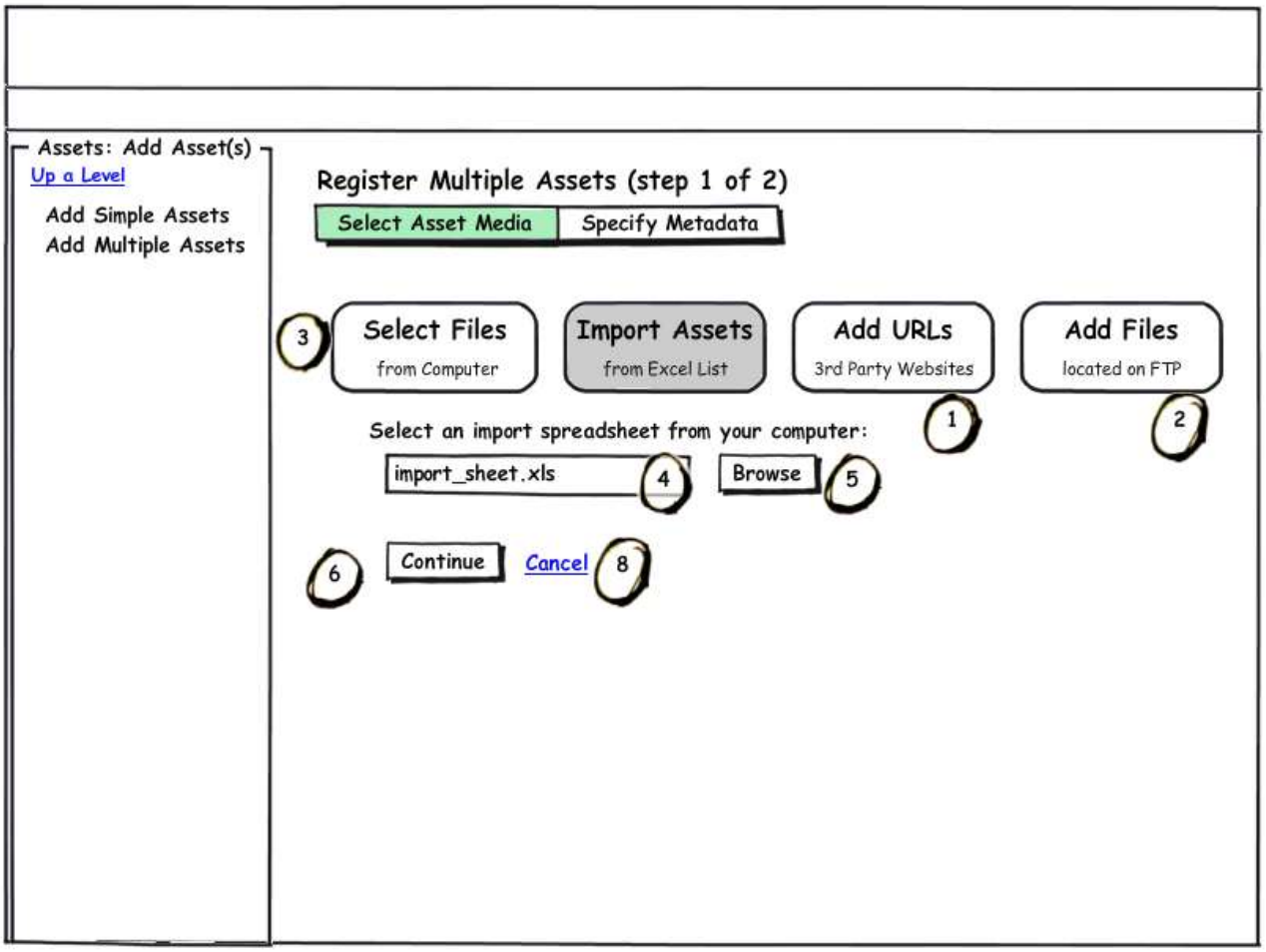

Figure 5. Import Spreadsheet

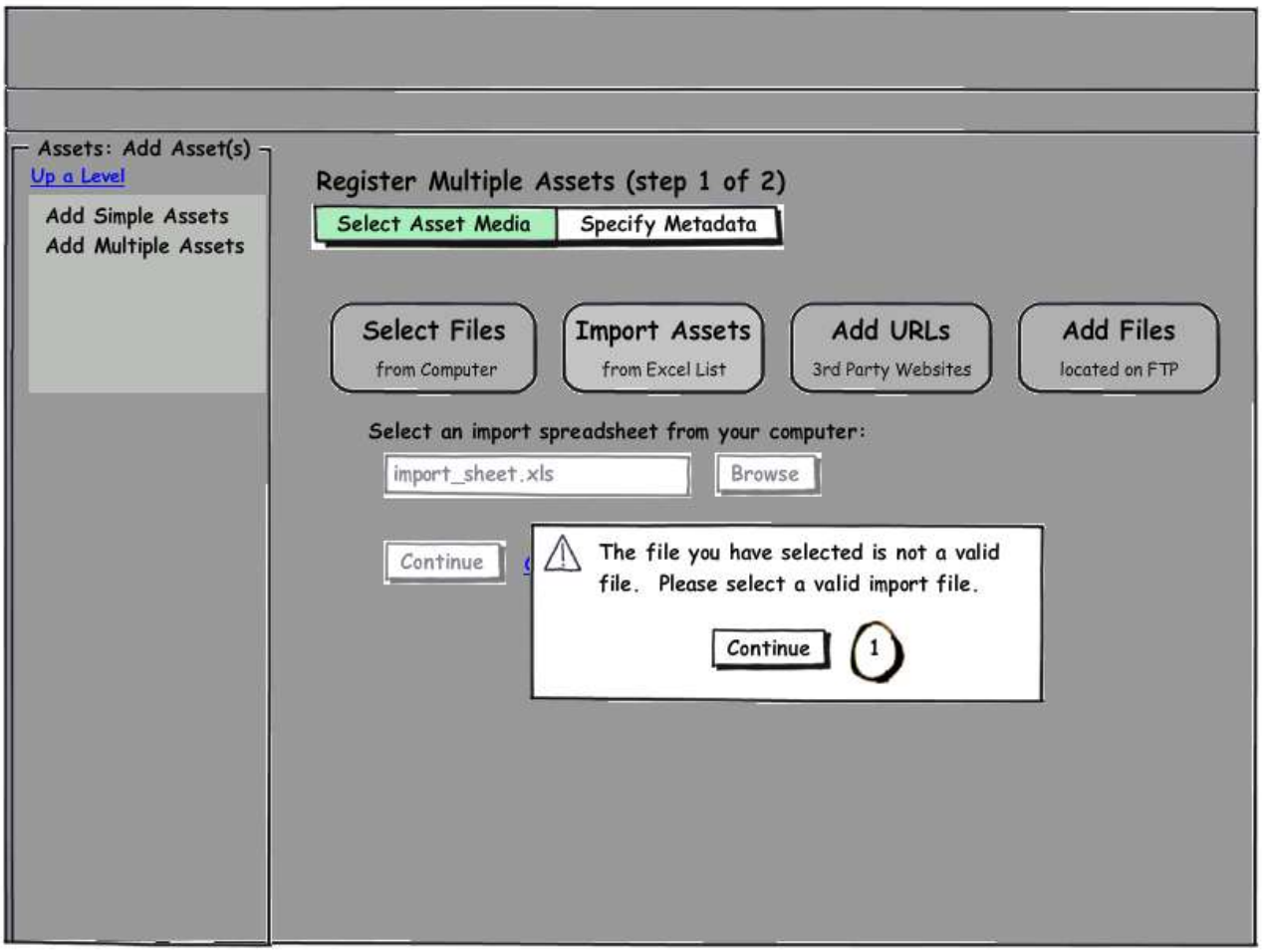

Figure 6. Import Spreadsheet – Invalid File

2.4.1 Navigation Elements

ID	Name	Destination	Description
1	Add URLs (3rd Party Websites)	State Change – Show Add URLs state	Clicking this button changes the state of the page; it will display the 'Input Website Addresses' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
2	Add Files (Located on an FTP)	State Change – Show Add Files from Server State	Clicking this button changes the state of the page; it will display the 'Input FTP Addresses' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
3	Select Files from Computer	State Change – Show Files on My Computer State	Clicking this button changes the state of the page; it will display the 'browser' and 'selected files' interfaces, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
5	Browse	Windows File Explorer	Allows user to select file from anywhere on computer, includin any networked hard drives. Selected file name/extension is populated into (4).
6	Continue	Specify Metadata	Clicking this button causes the registration process to continue, first validating that source media has been chosen and validating on the back-end that it is an understood media type. If any of these checks fail, the user returns to this screen with error information indicated. Errors are displayed as defined in the style guide.
8	Cancel	Page most recent prior to starting the registration process	Clicking this button discards all data related to the process up to this point and navigates back to the most recent page preceding the initiation of the process.

2.4.2 Other Elements

ID	Name	Type	Validation	Description
4	Selected File	Input Box	Valid File Type/Format	Selected Excel File for import into system. Must meet file format specified for bulk registration (format TBD). Must be excel file.

2.4.3 Error Messages

ID	Error event	Controls	Error message
1	Invalid File Type or Format	Continue	The file you have selected is not a valid file. Please select a valid import file. (Recommend we link to help page that contains valid file template and instructions on use). Continue button returns user to previous page state, with “Selected File” element emptied of any value.

2.5 Add 3rd Party URLs (Asset = URL)

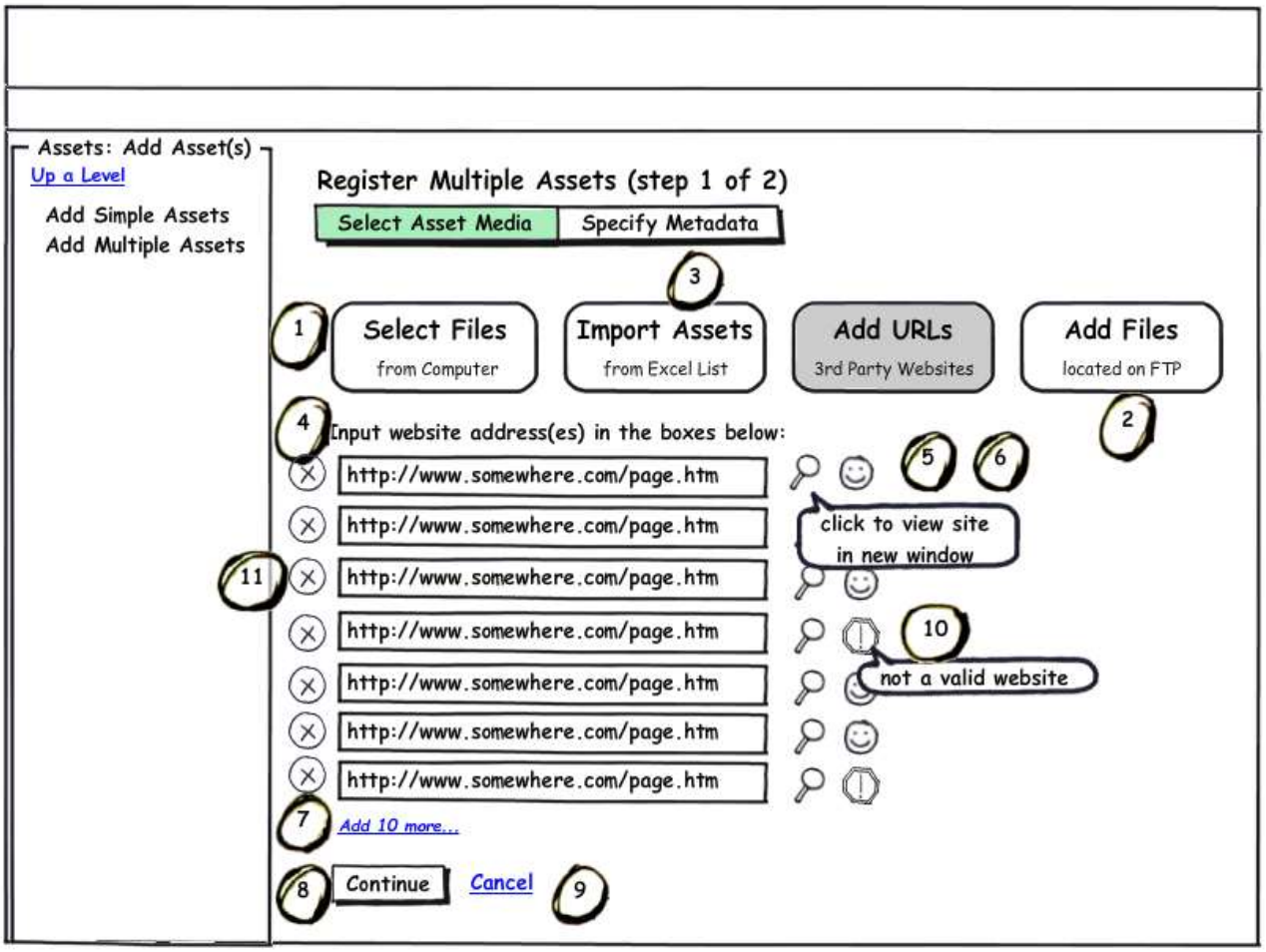

Figure 7. Add 3rd Party URLs (Asset = URL)

2.5.1 Navigation Elements

ID	Name	Destination	Description
1	Select Files from Computer	State Change – Show Files on My Computer State	Clicking this button changes the state of the page; it will display the 'browser' and 'selected files' interfaces, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
2	Add Files (Located on an FTP)	State Change – Show Add Files from Server State	Clicking this button changes the state of the page; it will display the 'Input FTP Addresses' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
3	Import Assets (From Excel List)	State Change – Show Import Assets from Excel State	Clicking this button changes the state of the page; it will display the 'select excel file' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
5	View Site in New Window	Entered URL in new browser window	Opens entered URL for appropriate row/input box in a new browser window, allowing user to view content of site and confirm validity
7	Add 10 More	State Change – Adds 10 more 'input boxes', 'view site in new	Recursive control; appears at the bottom of every set of input boxes; Allows user to add 10 more input boxes for URLs, including the 'preview' icon and the 'valid site' icon, which appear after an URL is entered, and the (X) delete control, which appears immediately (along with the (4) entered URL box).

		window', (x) delete control, and 'valid/invalid' indicators to page, below current boxes	
8	Continue	Specify Metadata	Clicking this button causes the registration process to continue, first validating that source media has been chosen and validating on the back-end that it is an understood media type. If any of these checks fail, the user returns to this screen with error information indicated. Errors are displayed as defined in the style guide.
9	Cancel	Page most recent prior to starting the registration process	Clicking this button discards all data related to the process up to this point and navigates back to the most recent page preceding the initiation of the process.
11	(X)	State Change – Removes selected Row	Clicking this button removes the row to the right of that button—the entered URL and 'view' and 'valid' icons, if any. Allows user quick method to correct errors.

2.5.2 Other Elements

ID	Name	Type	Validation	Description
4	Entered URL	Input Box	Valid URL Format; Site exists, is accessible	User can enter URL here; http:// not required, is assumed if not entered; https:// is also valid value. System will validate entered URL for availability—if system can access site (no 404, 403, etc. errors, indicating siteis not available), system wil display (6) icon. Otherwise, invalid site will display (10) icon. Asynchronous process—user can enter URL, and proceed to next URL, while system validates this entered URL
6	Site is Valid	Icon	n/a	Appears after system has determined entered URL (4) is a valid URL and site is available
10	Site is not Valid	Icon	n/a	Appears after system has determined entered URL (4) is not valid URL, and/or is not currently available

2.5.3 Error Messages

ID	Error event	Controls	Error message
4	See (4)--if user has entered invalid URL(s) in (4), system will display 'warning' message	Continue	Some of the URLs you entered are invalid. They will not be carried through to the next step – Select Metadata. Click 'Cancel' to correct the invalid URLs (or delete them), or click 'Continue' to continue with the registration process, without the invalid URLs.

2.6 Asset Located on Server (Asset located at URL)

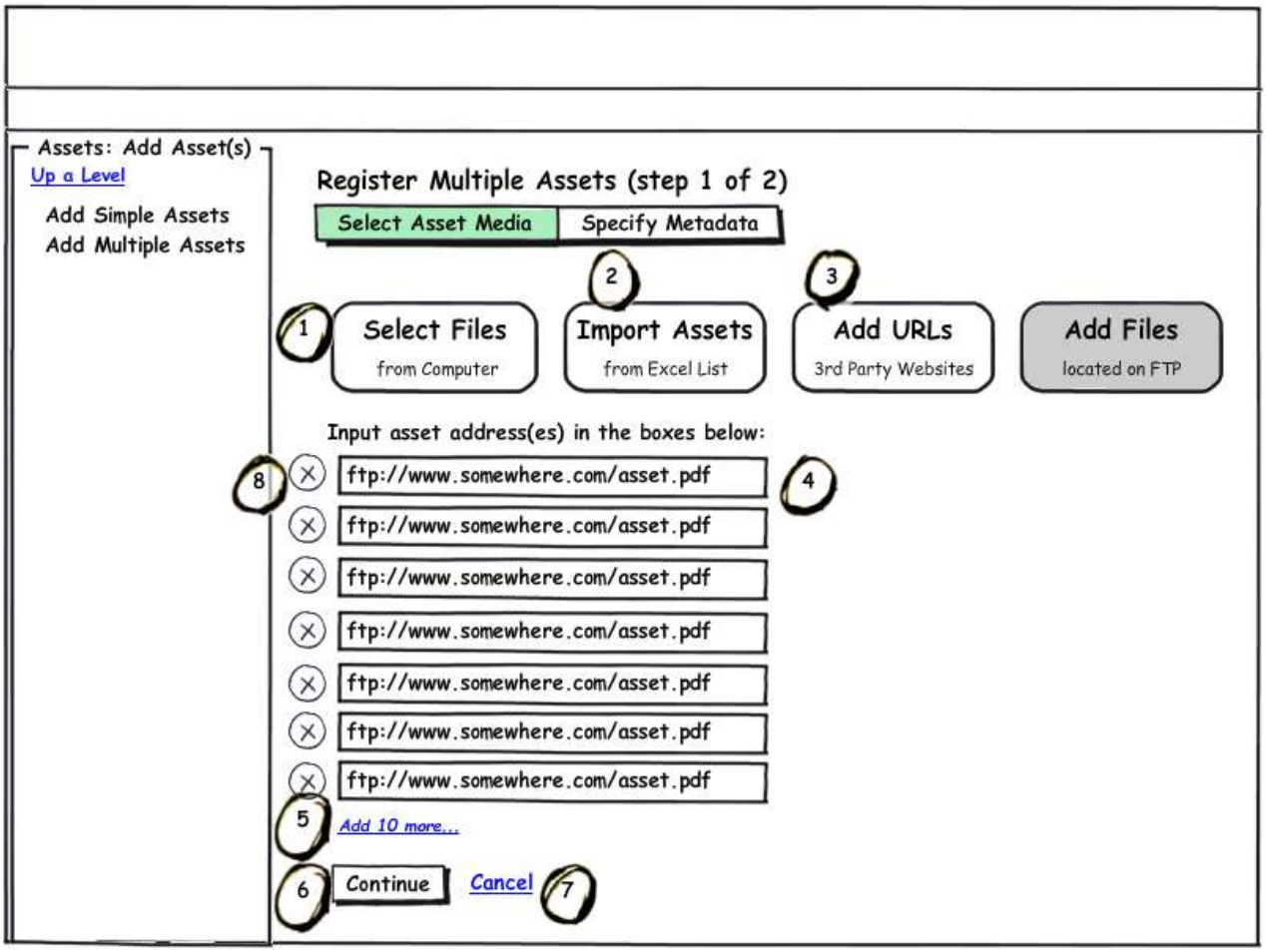

Figure 8. Asset Located on Server (Asset located at URL)

2.6.1 Navigation Elements

ID	Name	Destination	Description
1	Select Files from Computer	State Change – Show Files on My Computer State	Clicking this button changes the state of the page; it will display the 'browser' and 'selected files' interfaces, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
2	Add URLs (3rd Party Websites)	State Change – Show Add URLs state	Clicking this button changes the state of the page; it will display the 'Input Website Addresses' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
3	Import Assets (From Excel List)	State Change – Show Import Assets from Excel State	Clicking this button changes the state of the page; it will display the 'select excel file' interface, as well as the continue/cancel buttons, on this same page. Will abandon any entered data—warning will display informing user that entered data/selected files will not be used for registration (ok/cancel).
5	Add 10 More	State Change – Adds 10 more 'input boxes', 'view site in new window', (x) delete control, below current boxes	Recursive control; appears at the bottom of every set of input boxes; Allows user to add 10 more input boxes for URLs, including the (X) delete control, which appears immediately (along with the (4) entered URL box).

6	Continue	Specify Metadata	Clicking this button causes the registration process to continue, first validating that source media has been chosen and validating on the back-end that it is an understood media type. If any of these checks fail, the user returns to this screen with error information indicated. Errors are displayed as defined in the style guide.
7	Cancel	Page most recent prior to starting the registration process	Clicking this button discards all data related to the process up to this point and navigates back to the most recent page preceding the initiation of the process.
8	(X)	State Change – Removes selected Row	Clicking this button removes the row to the right of that button—the entered URL. Allows user quick method to correct errors.

2.6.2 Other Elements

ID	Name	Type	Validation	Description
4	Entered URL	Input Box	Valid URL Format; Site exists, is accessible	User can enter URL here; http:// not required, is assumed if not entered; https:// is also valid value. System will validate entered URL for availability—if system can access site (no 404, 403, etc. errors, indicating siteis not available), system wil display (6) icon. Otherwise, invalid site will display (10) icon. Asynchronous process—user can enter URL, and proceed to next URL, while system validates this entered URL

2.6.3 Error Messages

ID	Error event	Controls	Error message
4	See (4)--if user has entered invalid URL(s) in (4), system will display 'warning' message	Continue	Some of the URLs you entered are invalid. They will not be carried through to the next step – Select Metadata. Click 'Cancel' to correct the invalid URLs (or delete them), or click 'Continue' to continue with the registration process, without the invalid URLs.

2.7 Specify Asset Metadata

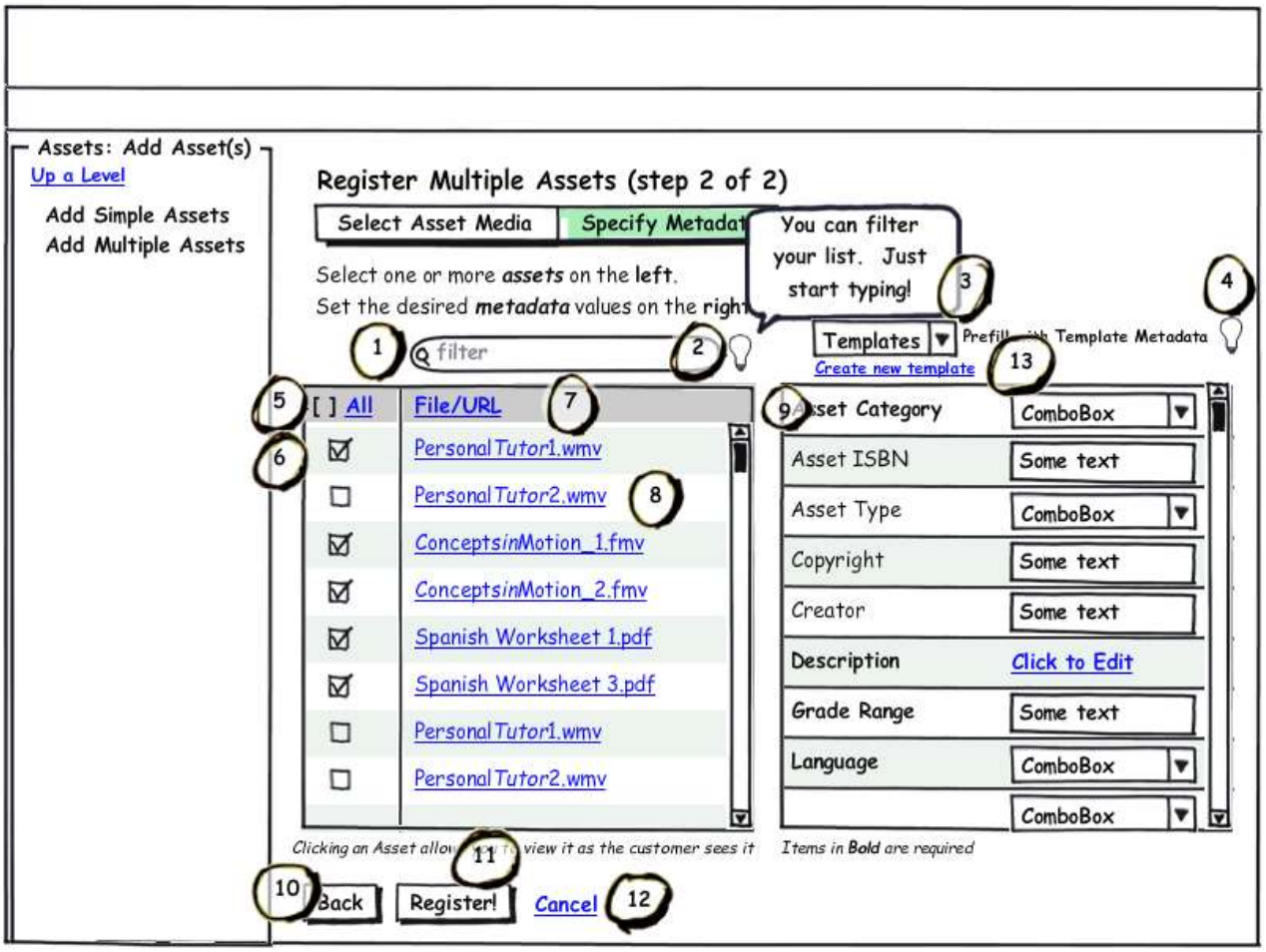

Figure 9. Specify asset metadata

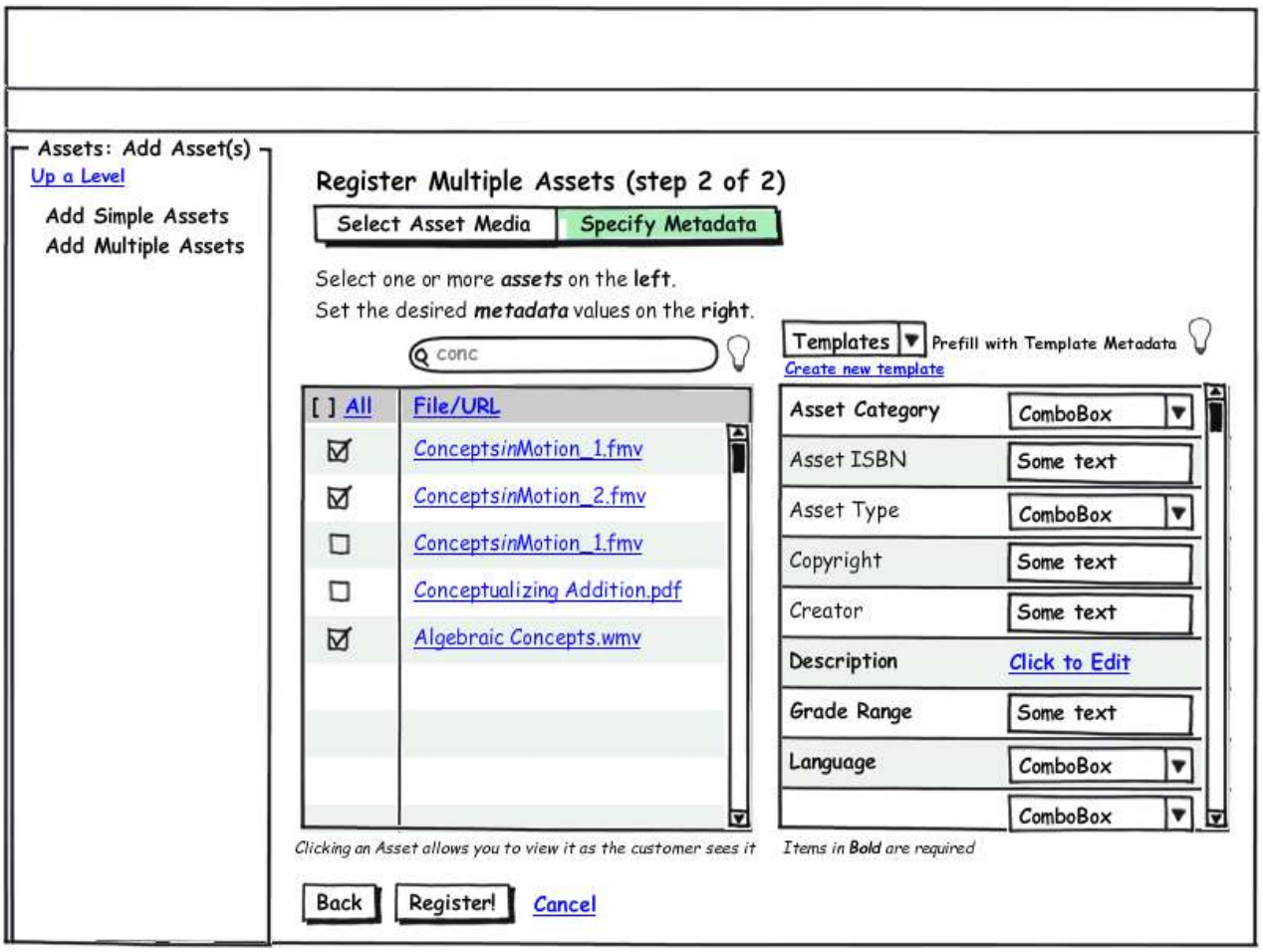

Figure 10. Specify asset metadata – Example of Filter

2.7.1 Navigation Elements

ID	Name	Destination	Description
1	Filter	State Change – Filters 'Asset List' based on entered characters	Dynamic filter—when user enters characters, system automatically filters 'Asset List' to contain only assets with a string matching the filter; see example image—user has entered 'conc', system has filtered to show all assets with 'conc' in the name/URL of the asset.
2	Filter Tooltip	Tooltip	Displays Tooltip "You can filter your list. Just start typing!"
4	Template Tooltip	Tooltip	Displays Tooltip "You can pre-fill your metadata values using a template you created previously. Or create a new template by clicking "Create Metadata Template".
7	File/URL	Sort A-Z, Z-A	Clicking on this once will sort files A-Z. Clicking it again will sort files Z-A.
8	View Asset as Customer Sees It	New Window - "Asset Details" Page as it exists in Portal	Clicking this for the selected asset will display that asset, with all of its currently entered metadata, in a new window. The new window will be the 'Asset Details' page for the selected asset, as a Teacher (or other Portal User) would see it through the ConnectED Portal.
10	Back	Step 1 – Select Media Files	Returns user to previous step in process, abandoning any metadata changes the user has made; Present warning pop-up to user, indicating all entered data will be lost.
11	Register!	Processing state screen	Clicking this button causes all the information to be finalized in registration.
12	Cancel	Page most recent prior to starting the registration process	Clicking this button discards all data related to the process up to this point and navigates back to the most recent page preceding the initiation of the process.
13	Create Metadata Template	Create New Template layover	Launches create new template layover, allowing the user to enter values for all metadata fields, and save the template by inputting a name.

2.7.2 Other Elements

ID	Name	Type	Validation	Description
3	Templates	Drop Down	n/a	List of user-created templates. Allows user to select a template. Selecting a template will fill the appropriate metadata fields on the 'Specify Metadata' page with the values as specified in the template.
5	[ ] All	Checkbox	n/a	Checking this box will select all assets currently displayed in the 'Asset List' widget. Unchecking it will deselect all assets. The 'Metadata Fields' widget will then be activated, enabling all metadata values that are common to the selected asset(s). System will populate metadata fields with previously entered metadata values (if any) that are common to all selected files.
6	[ ] (One per asset row)	Checkbox	n/a	Checking this box will highlight the selected asset(s), and activating the 'Metadata Fields' widget, enabling all metadata values that are common to the selected asset(s). System will populate metadata fields with previously entered metadata values (if any) that are common to all selected files. Any metadata field values that are unique to one or more of the selected assets will not be populated, and will remain blank instead.
9	Metadata Fields	Multiple	Multiple	See “Register Simple Asset” UI Specification for all metadata fields (for all types of assets), and their values, types, validations, valid values, etc. User can only register simple assets here, so all metadata fields are the same. For metadata fields that are not applicable to one or more of the currently selected assets—display the field in a disabled state; only enable 'type specific' metadata fields if the selected asset(s) are of the correct type. If a user enters a value for a field that is currently empty in the metadata fields widget, but for which a value exists for one or more of the selected assets, the system will overwrite the existing value with the newly entered value.

2.7.3 Error Messages

ID	Error event	Controls	Error message
9	Invalid value/similar error	Multiple	Multiple—see “Register Simple Asset” UI Spec to see field-specific error messages for every metadata field.

2.8 Specify Asset Description

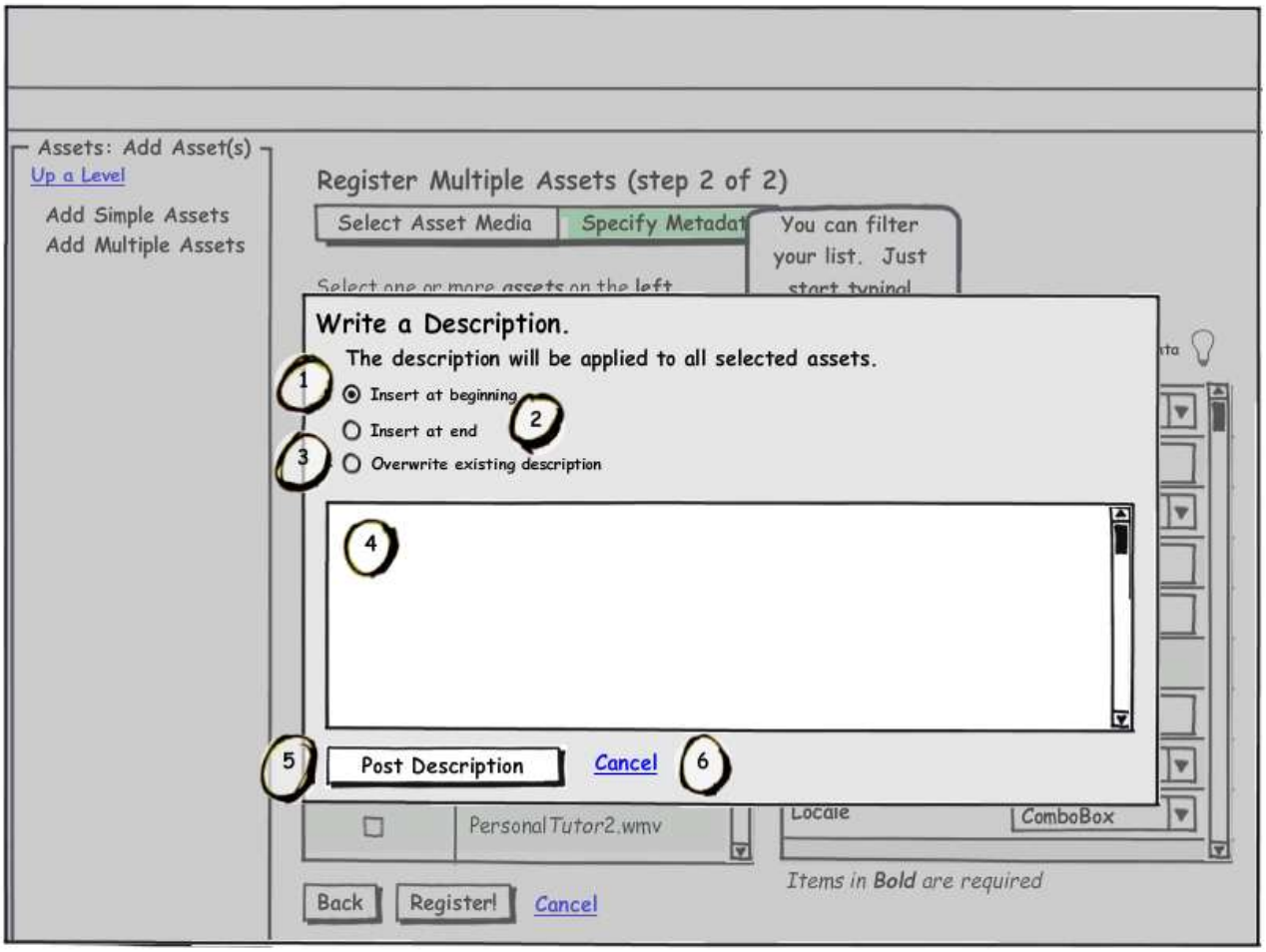

Figure 11. Specify asset metadata – Description

2.8.1 Navigation Elements

ID	Name	Destination	Description
5	Post Description	Specify Metadata page	Returns user to “Specify Metadata” page; entered description has been appropriately inserted/appended/overwritten to selected asset(s) per selected radio option.
6	Cancel	Specify Metadata page	Returns user to 'Specify Metadata' page, with no changes made to description metadata field for selected asset(s).

2.8.2 Other Elements

ID	Name	Type	Validation	Description
1	Insert at beginning	Radio Button	Only 1 radio button of group of 3 (1, 2, 3) can be selected	Selecting this will insert the entered text BEFORE any existing description text. Existing description text will not be altered in any other way.
2	Insert at end	Radio Button	Only 1 radio button of group of 3 (1, 2, 3) can be selected	Selecting this will insert the entered text AFTER any existing description text (do not assume a carriage return unless user explicitly enters one). Existing description text will not be altered in any other way.

3	Overwrite existing description	Radio Button	Only 1 radio button of group of 3 (1, 2, 3) can be selected	Selecting this will completely overwrite the existing description, replacing it with the entered text.
4	Input Text	Multiple Line Text Input	Character limit (based on database length for asset description)	User enters description text here. See 'description' field metadata rules in 'Register Simple Asset' UI Spec.

2.8.3 Error Messages

Not applicable.

2.9 Create Metadata Template

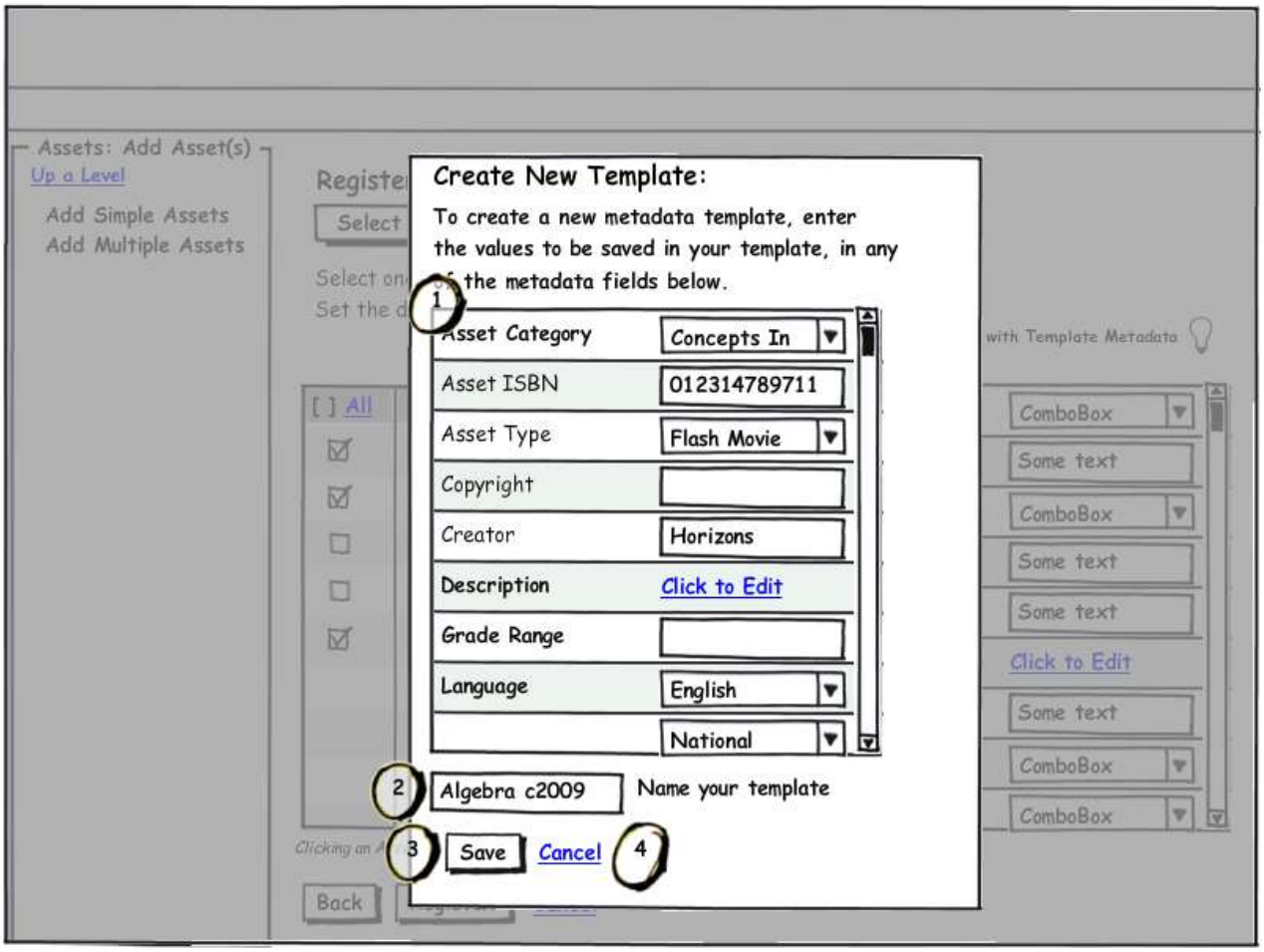

Figure 12. Create Metadata Template

2.9.1 Navigation Elements

ID	Name	Destination	Description
3	Save	Specify Metadata Page	Returns user to Specify Metadata page; “Templates” dropdown is updated to include newly created template.
4	Cancel	Specify Metadata Page	Returns user to Specify Metadata page; no new template is created.

2.9.2 Other Elements

ID	Name	Type	Validation	Description
1	Metadata Fields	Multiple	Multiple	See “Register Simple Asset” UI Specification for all metadata fields (for all types of assets), and their values, types, validations, valid values, etc. User can only register simple assets here, so all metadata fields are the same. For metadata fields that are not applicable to one or more of the currently selected assets—display the field in a disabled

				state; only enable 'type specific' metadata fields if the selected asset(s) are of the correct type. If a user enters a value for a field that is currently empty in the metadata fields widget, but for which a value exists for one or more of the selected assets, the system will overwrite the existing value with the newly entered value.
2	Template Name	Input Box	A-Z, 0-9, _ are only allowed characters	User enters name of template to appear on “Templates” drop down.

2.9.3 Error Messages

ID	Error event	Controls	Error message
1	Invalid value/similar error	Multiple	Multiple—see “Register Simple Asset” UI Spec to see field-specific error messages for every metadata field.
2	Invalid Template Name	Continue button	“You have entered an invalid Template name. Template names must only include characters A-Z, 0-9, and underscores (_). Click continue to correct Template name.”

2.10 Assets Loading to System

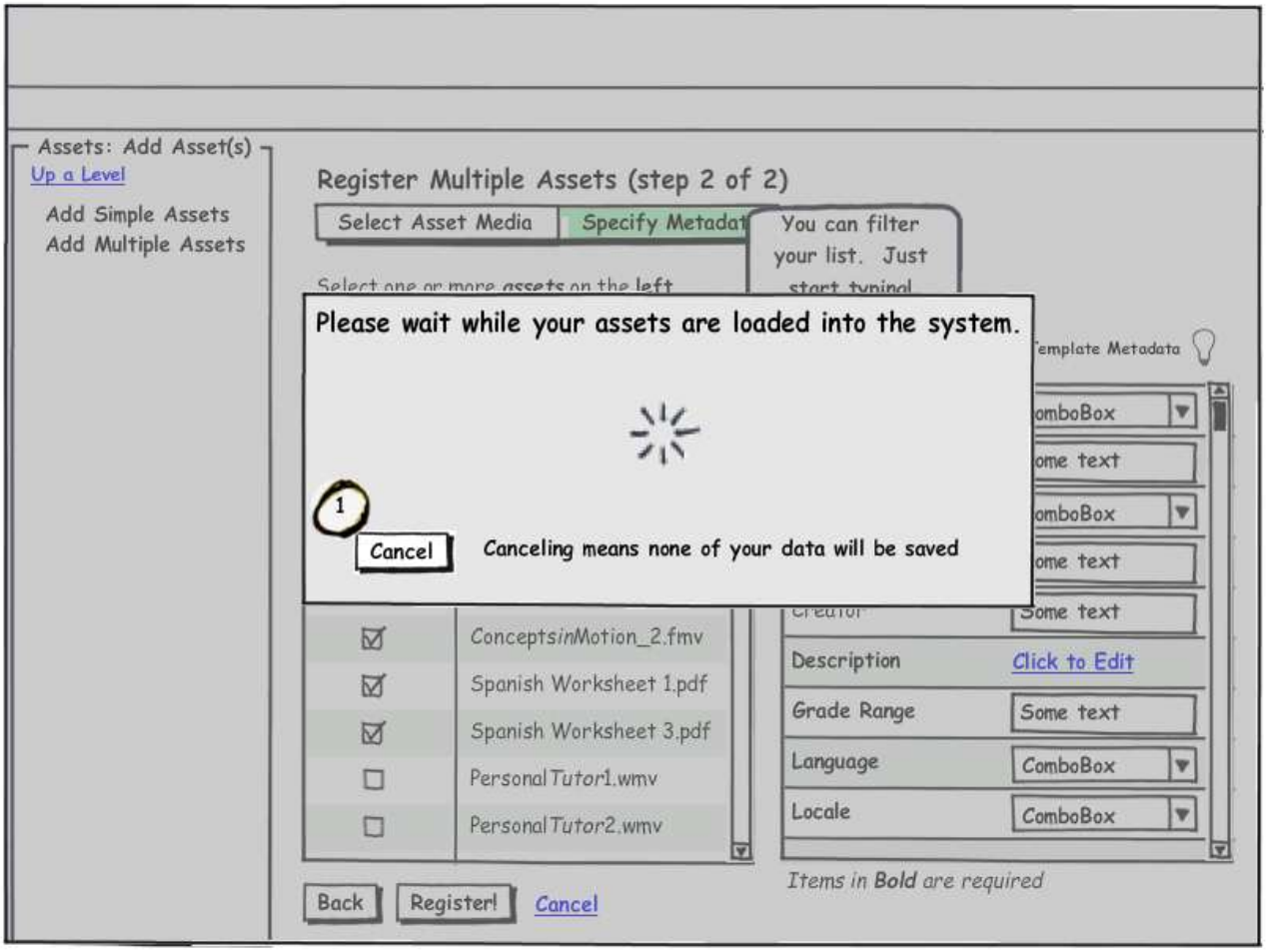

Figure 13. Loading Assets to System

2.10.1 Navigation Elements

ID	Name	Destination	Description
1	Cancel	Specify Metadata Page	Returns user to specify metadata page. Rolls back any 'registered' assets' from batch, and does not save them in the system. Specify Metadata page should contain all previously entered user values, before they clicked 'Register!' button.
2	n/a	Assets Saved to System page	Once assets are registered, system will take user to 'Assets Saved to System' page.

2.10.2 Other Elements

ID	Name	Type	Validation	Description
n/a	Waiting	Timer/animation	n/a	Some form of 'waiting' animation displays, while assets are being loaded into system.

2.10.3 Error Messages

Not Applicable.

2.11 Assets Saved to System

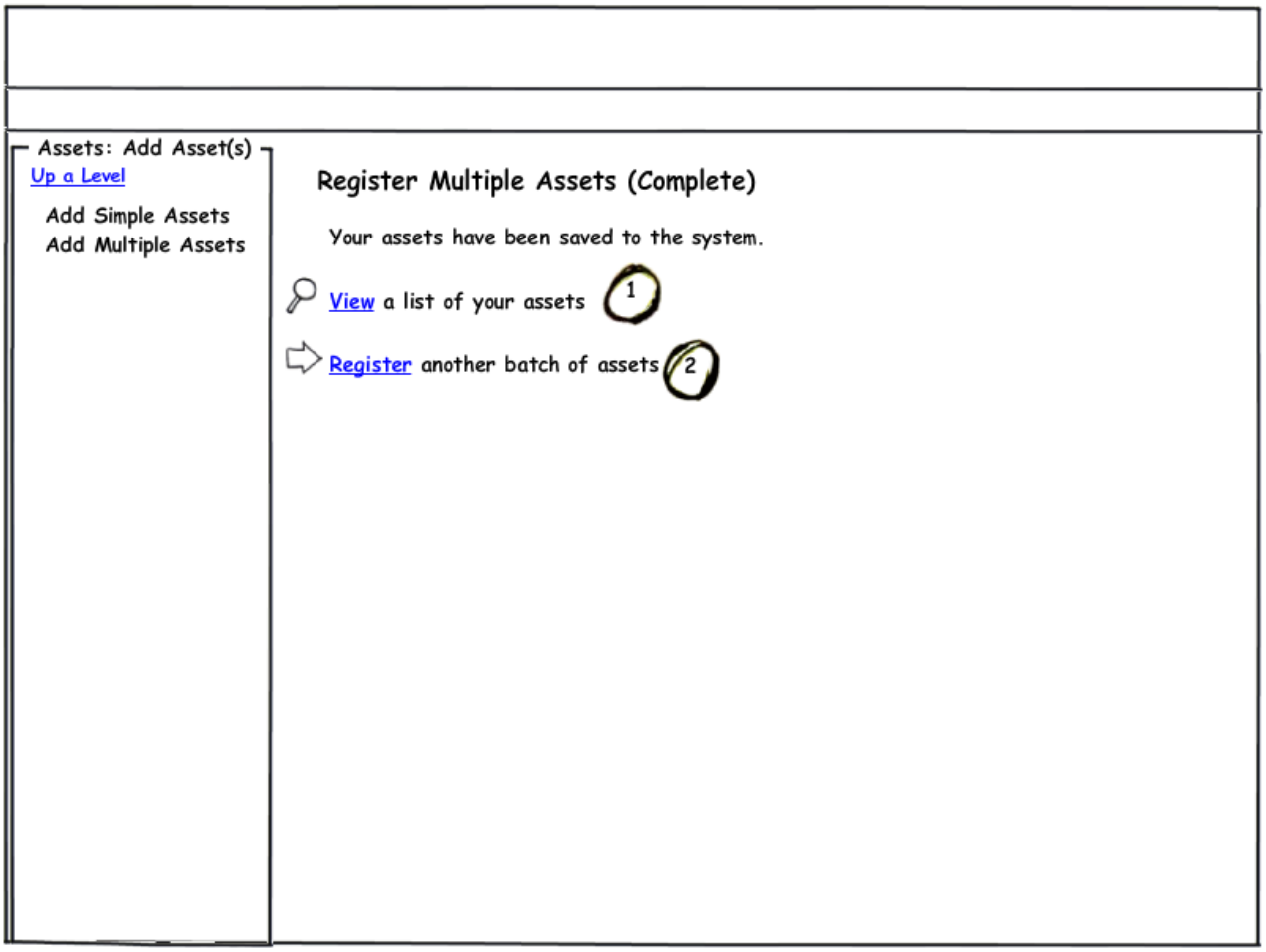

Figure 14. Assets Saved to System

2.11.1 Navigation Elements

ID	Name	Destination	Description
1	View	Search Results List	Takes user to search results list, as already exists for CMS search functionality; list of assets displayed is filtered to contain only assets User just completed registering to system in this 'logical unit of work' (i.e. files uploaded when user clicked 'Register!").
2	Register	Select Media Files Page – no button selected state	Returns user to start of multiple assets process—the Select Media Files page, with one of the alternate states displayed (i.e. no button selected).

2.11.2 Other Elements

Not Applicable.

2.11.3 Error Messages

Not Applicable.