BOP Digital Platform User Guide

I. Overview

The BOP Digital Platform is the online dashboard for the BOP Schools and Citizen Science Program. Students and teachers are the main users of the platform; they're collecting and publishing data, developing authentic field research, and creating the STEM curriculum that links keystone species restoration in New York Harbor to teaching and learning in New York City Schools. Citizen scientists, professional scientists, and project partners also play an essential role in the BOP digital platform by collecting and publishing their own data, vetting student research, and providing field support to teachers. The platform offers a range of tools to accomplish this mission, including expedition management, field uploading, data publishing, search and download, the interactive curriculum library, student research portal, and a course calendar/registration system. Below is a breakdown of the digital platform's main features and how these features are meant to be used.

II. Questions, problems, feedback?

If ever you have questions, suggestions, or problems to report please click the icon on the upper right of the screen. You will be given a menu of options and asked to submit a message. Someone from the BOP Schools team will respond to your message within 24 hours.

III. Users and Roles

There are two types of individual users on the system: **team lead** and **team member**. In general team leads are teachers or scientists and team members are students.

Who are team leads? A team leads is anyone who has attended a BOP training and knows how to lead a team in BOP fieldwork and data collection. Team leads can be teachers, citizen scientists, professional scientists, site coordinators, or others who want to lead teams, use curriculum, and collect data. Team leads are generally 18 and over, however we do make exceptions for trained and highly motivated high school students (16+) to lead their own teams.

What do team leads do? On the curriculum side, team leads can view, create, save, duplicate, and provide feedback on lessons. On the ORS side teams leads can register ORSs, create teams, invite members, launch and publish expeditions, view, analyze, and download data, register for events, and approve student research. Team leads also sign up for events and manage their team members' research development and publication process.

Who are team members? Team members are typically students working under the leadership of their teacher or other trained team lead. Team members may also be adults who have not attended a BOP training but want to support a friend or other adult team lead in monitoring their ORS.

What do team members do? The system is designed for team members to collect and submit protocol data, which is then approved by the team lead. Team members can also view, search, compare, and download published data, including their own and other teams'. Team members will also be able to create and publish their own field science research using the platform's "research builder" tool (currently in development).

Teams

Teams are designed to function as class sections or groups of students. As team leads, teachers can and should create as many teams as they want.

IV. Sign-up and approval process

Sign up here: https://platform.bop.nyc/authentication/signup

To sign up as a Team Lead:

1. Choose team lead as your "role."
2. The "type" field will then appear. If there is no type that is appropriate for you, choose "other."
3. Under organization, choose the organization that you are affiliated with. If you are a citizen scientist or unaffiliated with a school or organization, choose "unaffiliated/none" at the top of the list. Search the list carefully! Please do not choose Billion Oyster Project, unless you are an employee of Billion Oyster Project.
4. If your organization is not listed, follow the link "not listed?" to add a new organization. Be sure to list all the organization's info accurately and completely as this will become the organization's public profile.
5. Complete the remainder of the sign-up form then click the sign-up button. Your request will then be submitted to BOP admin who will approve or waitlist your account within 24 hours. If you have already attended a BOP training your account will be approved immediately. If you have never attended a BOP training, your account may be waitlisted until you attend a training. Waitlisted users may still sign up for events and view ORS data.

To sign up as a Team Member:

1. Choose team member as your "role."
2. The "organization" field will then appear. Choose your school or organization from the list.
3. Once you choose your organization, the "team lead" field will then appear. Choose your teacher or team lead from the list.

4. Complete the remainder of the sign-up form then click the sign-up button. Your request will then be submitted to your team lead who will approve your account. Team members can also be invited to sign-up by their teacher or team lead. In this case, you will receive an email with a link to a shorter version of the sign-up page. Follow the instructions on this page and submit to confirm your account.

V. Events

Event registration is an extremely important tool for the BOP Schools program. We use the event system to keep track of how many BOP programs you have attended, your level of training, and credits.

To register for an event, simply click the event tile, read the event information, and click the "register" button. You will receive a confirmation email immediately after you register, which also includes a link to unregister (in the event something comes up and you are unable to attend). It is very important to unregister as early as possible, so that your spot can be made available for others.

You can also search past and current events by keyword, type, and date. Note: you do not need to be a registered user to search and view events. Team leads who are still pending or waitlisted can register for events, view ORS data and curriculum.

Team members are not eligible to register for events.

VI. Restoration Stations

Dashboard

This is page has several features which link out to other tools on the system:

· "Oyster Restoration Stations" – a map of all registered ORS in the system. From the map you can click on any ORS icon to view its profile including its team leads, published data, and key stats.

· "My ORS" - a list of your ORS and tool for registering new ORS.

· "My Expeditions" - a list of all expeditions you have launched, saved, and/or published.

· "Team members" – a list of all your registered team members.

· "Activity" – recent activity by your fellow team leads and team members.

· "Documents" – links to all BOP field science documents stored on google drive.

Expeditions

This page has a list of all your expeditions (past, present, future) and a link to create/launch new expeditions.

How to create an expedition:

1. Click “create an expedition” and you will be taken to the expedition launch form.

2. Give your expedition a unique name – create a name that will allow you to recognize when and with whom the expedition was conducted.

3. Select a team. Note: an expedition can only be assigned to one team. In order to add team members from more than one team on a single expedition you would need to create a new team with that combined membership. To add team members or create a new team go to settings>members.

4. Select an ORS. Note: an expedition can only be launched to one specific ORS. If you own more than one ORS or if there are multiple ORS at your site, it is extremely important to keep an accurate record of which is which!

5. Enter any special instructions that you want your team members or volunteers to read when they get the expedition invite.

6. Enter the date/time that your field expedition will actually take place (start and stop). It is very important that the date/times are accurate as these will be used to create events for your expedition. If for some reason the date/times change before your expedition, you must go back to the expedition’s page and edit the date.

7. Click the “publish to events” box if you want your expedition to be automatically listed on the events page as an upcoming event. This will help you recruit volunteers.

8. Assign team members to one or more protocols by dragging their names into the appropriate columns. Or click “auto assign” and the system will assign all team members randomly to one protocol. Please note, team members cannot be assigned on a mobile device so expeditions cannot be launched from the field! If two or more team members are assigned to the same protocol and enter data at the same time, they will overwrite each other. To avoid this team leads may consider inviting only one team member per protocol to function as the “scribe.”
9. After you have assigned at least one team member to each protocol, click launch. This will automatically send email invitations to the selected team members with a link to their assigned protocol.

Conducting Expeditions

Expeditions are broken into five protocols of data collection. Each protocol has its own data entry form. The system is designed for team members to do the work of entering field data into their assigned protocol forms. Team leads can also assign themselves to one or more protocols in order to supervise data entry in real time. If two or more team members are assigned to the same protocol and enter data at the same time, they will overwrite each other. To avoid this team leads may consider inviting only one team member per protocol to function as the “scribe.” Instructions for entering data into each protocol are found in the ORS field science manual and/or next to each field in the protocol.

Submitting and Publishing Expeditions

All data should be saved regularly! The BOP Platform does NOT have an auto-save feature, therefore you must always save your data (expeditions or lessons) manually.

Team members can submit data in the field at the end of the expedition, or return to the classroom to check data and submit at a later time. Once the team member submits data, their team lead receives an email notification that the form has been submitted. Team leads must then review their teams data for accuracy. Team leads then approve and publish the data, or, if there are errors or discrepancies, team leads return the protocols to the appropriate team members with a note indicating the errors. The team member is then expected to make changes and resubmit. This process can continue indefinitely until the team lead approves and publishes the data.

Note: protocols are submitted and published individually. An expedition can be published with fewer than five protocols; however, BOP always prefers all five protocols to be published if the situation allows. Once the protocol data is published it becomes viewable and downloadable to all digital platform users.

Data

Search and View Single Expeditions

The "Search" tab allows you to search for one or more published expeditions. You can search by keyword, date, ORS name, organization, team, team lead. You can also click a single expedition and view all of its published data in a stylized format. All published expeditions are displayed on the search page as tiles. Click on any tile to view that particular expedition's published data.

Download

Use the "download" tab to select one or more parameters from one or more expeditions and create a dataset. You can view the dataset in html (as a simple table) or click download to create a CSV file. Follow the three steps on this page to create your dataset.

VII. Curriculum

Units

Unit plans provide an overview of objectives, skills, content, and results in a series of lessons. Units are also the system we use to group and sequence individual lessons on the platform. Click on a unit tile to view its content and associated lessons. You can click directly to individual lessons from the unit plan.

Lessons

This is the searchable database of all published lessons on the digital platform. You can search and sort lessons by keyword, subject, setting, and unit. Click on an individual lesson to view, download, save, duplicate, provide feedback, and log teaching.

Create new lesson

This allows you to create your own lessons on the digital platform. Any approved team lead can create and submit a lesson. All submitted lessons will then go to the BOP Curriculum Team for approval. The Curriculum Team will either approve and publish your lesson, or return it you as draft for further review. Once the lesson is approved and published it will appear on the "Lessons" page with all other BOP lessons. Other team leads will be able to see your username as the author and send you feedback after they have taught the lesson.

The following features are accessed from individual lesson plans via the buttons on the top right:

a. Download

Use this button to download a .doc version the lesson plan and .zip file of the associated teacher resources and handouts.

b. Feedback

Use this button to give detailed feedback on a lesson after you have taught it to at least one class of students.

c. Log teaching

Use this button to keep a running record of how many times and to whom you have taught a particular lesson. Teaching log data from other users will be posted to a particular lesson, so that you can see the total # of teachers and students who have used the lesson.

d. Duplicate

Clicking this button will duplicate the lesson in a new editable form. You can then modify the lesson in any way you see fit and republish it with a new title under your own username. This feature allows teachers to "fork" existing BOP lessons without going through the effort of rewriting the entire lesson. Note: you still have to submit drafts to the BOP Curriculum Team for approval and final publishing.

My Library

This is the tool for organizing lessons that you have created (drafted or published) and starred. The tool is broken into two tabs:

Created lessons

These are lessons that you have drafted and saved or drafted and submitted. These could either be lessons from scratch or lessons that started as duplicates of other lessons. You will see icon notifications on the lesson tiles showing whether it is in draft, submitted for approval, or approved and published.

Starred Lessons

These are lessons that you have starred for later use. To star a lesson, you must first open the lesson plan then click the star next to the lesson title. All starred lessons will instantly appeared in your library's *Starred Lessons* tab.

Glossary

This is a searchable database of all vocabulary terms used in any BOP lesson. Clicking the magnifying glass icon next to a particular term will immediately bring you to a list of lesson(s) in which the term is used. You can also use this tool to add new vocabulary terms directly to the database.

VIII. Settings

Settings is located in the drop down menu under your username in the upper right corner of any screen. Currently, under settings you have the following tabs:

Profile

This is where you create and edit your user and account settings, including your email, password, and profile picture.

Members

This is where you add and edit team members. You can either import team members in bulk with a CSV file or you can add them individually using the "Add team members" button. When adding team members you will be asked which team you want to assign them to. If you want to assign them to a new team, choose "create a new team" in the drop down menu for team assignment. Another field called "Create A New Team" will then appear into which you can type the name of the new team. In the future, we will be adding a profile page feature for teams, so that you can add more detailed info about your teams (classes), assign one team member (student) to be team captain, upload pictures, and more.

VIV. Metrics

Metrics are a statistical-graphical summary of all activity on the BOP Digital Platform. Use metrics to see how your team is doing, # of expeditions to your ORS, # of published data sets, lessons you have published, and much more.