DCCD functional design

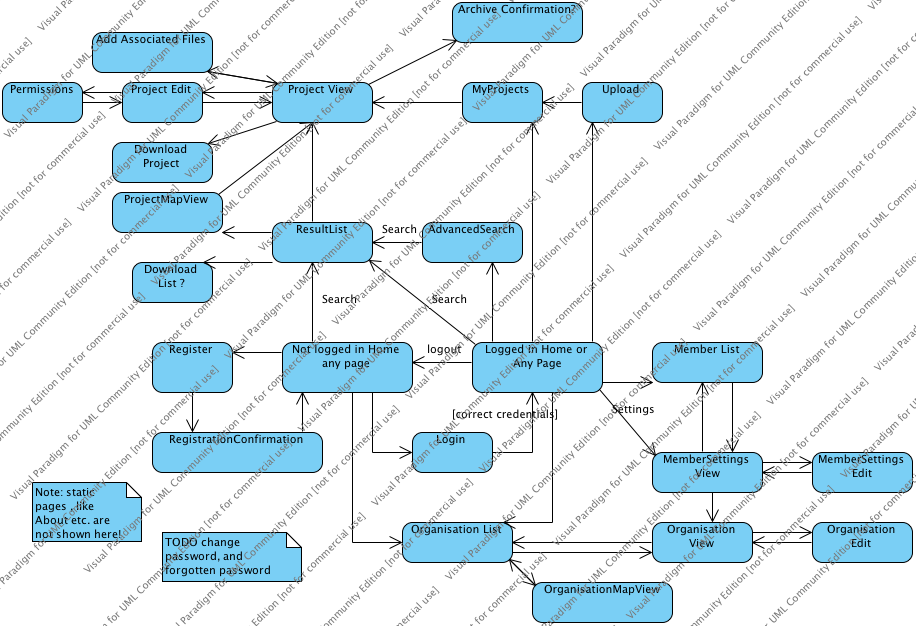
**Version: draft**

# Introduction

This document describes the DCCD web application functionalities with focus on the Graphical User Interface (GUI). Its intended audience is software developers and testers of the web application.

# Overview

Below is a schema depicting the main site structure (or navigation) with the pages and links between them. Note that there is a difference between ‘logged in’ or ‘not logged in’. Many pages also look differently depending on the user role (admin or regular user) and if the content (MemberSettings, Project) is ‘owned’ by the user.



# The interaction design (almost original specification)

At this initial stage this document is used to gather all information scattered around on the Trac site (http://trac.dans.knaw.nl/dccd/wiki/).

Text between curly braces {} is not implemented or not valid functionality.

Use this as inspiration for new documentation and when possible add or change it.

## Use Cases

These are dependent on the user role. The roles add possibilities to the account; MEMBER can do more then what NON-MEMBER can and ADMIN can do more then what MEMBER can.

NON-MEMBER

* NOTE: missing is a ChangeSiteLanguageUc
* RegisterUc - become member
  + RegistrationPage
    - fill in account details
    - fill in settings (optional)
    - confirm registering or cancel
  + RegistrationConfirmationPage
    - read notice on account approval procedure
    - (email sent to user containing account info)
    - (email candidate member notification sent to administrator)
    - (dead end)
  + The admin will logically continue with: AdjustMemberUc
* LoginUc - log in (members only)
  + LoginPage
    - fill in account details
    - confirm login or cancel
    - (user now logged in)

(redirected to page where user came from)

* RetrievePasswordUc - in case password forgotten
  + LoginPage
    - use can't access account link
  + AccountAccessPage
    - enter either e-mail address or username
    - confirm send (or cancel)
    - (dead end)
  + Using the link in the e-mail received, continues with ChangePasswordUc.
* find data using search, {advanced/attirbute search}
* view participating institute {/ view its data}
* resultlist, refine, view result

MEMBER

* LogOutUc - log out
  + PersonalBar?
    - initiate logout
    - (user now logged out)

(leads back to where user came from if authorised, else HomePage?)

* UploadUc - upload new project(s)
* NOTE: missing ViewProjectsUc
* download data  
  NOTE: not further specified!
* AdjustProjectUc - alter a project
  + ProjectPage (edit)

Optionally:

* + - {edit metadata entity structure}
    - select a specific entity, and edit its attributes

{or perform ManageValueFilesUc or ManageAssocFilesUc (to upload/remove one or more value/associated files).}

* + - adjust default permissions
    - save or discard changes
    - continue with: ArchiveProjectUc
* {ManageValueFilesUc}
* {ManageAssocFilesUc}
* ArchiveProjectUc - archive a project

pre: administrator, or dataprovider and project is draft

* + ProjectPage
    - initiate archiving

NOTE: missing validation and confirm, also unarchive?

* ViewAccountInfoUc - view own account/member info
  + MemberPage -own
    - view details
* AdjustAccountInfoUc - alter own account/member info
  + MemberPage (edit) -own
    - change member details
    - save or discard changes
    - (changes are saved)
* ChangePasswordUc - change own account password
  + ChangePasswordPage
    - enter new password
    - save or cancel
* ViewOtherMemberUc - view someone elses member info
  + MemberPage
    - view details
* {todo: SuggestTermUc?}
* {todo: commenting on data}

ADMIN

* AdjustMemberUc - alter a members status and/or details
  + MemberPage
    - Optionally change member status
    - as a part of the non-member: RegisterUc , this use case concerns changing account status. If it is set to active, the user will become a member and be able to perform LoginUc.
    - Continue with NotifyMemberUc
  + MemberPage (edit)
    - Optionally change member details
    - save changes or cancel
    - (changes are saved)
* NotifyMemberUc - notify a user (of changes in member info)
  + ChangeMembershipPage
    - optionally fill in a comment
    - confirm sending or cancel
    - (email notification about member info changes sent to user)

Continue with (return to) containing use case.

* {todo: manage terms in picklists (update, remove, add)}

## Web Pages

### General

This section describes general principles that improve usability when applied consistently though the site (web application).

* Global - notes relating to all pages / the site in general
* Definitions
  + Entity: one of the 'levels' in TRiDaS, i.e. project, object, element, etc.
  + A 'specific entity' is e.g. a certain element.
  + Attribute: key/value pair of a specific entity (not to be confused with the meaning in XML). Ex: a project has attribute title. In the interface, it consists of a key 'title' and value, e.g. 'Shipwreck 123’.
  + Text file / value file: file containing the actual measurement data in some text format.
  + Associated file: file containing related information, e.g. a pdf of a publication.
* Page titles
  + Page titles (html head title element) should be: <pagename> - DCCD @Not working for search results, system info,..
* Messages
  + Use inline messages near the top of the page (so \_no\_ popups/alerts), unless specified otherwise. Inline messages come in three flavours (with different designs): info, warning, and error. Consistently place them within a container s.t. a style (one of three) can be later applied to all messages.
  + When a choice/ confirmation is required, use a popup (implemented in Easy as a kind of layer). Design one that can cope with more options then only 'OK' and 'Cancel'.
* Input fields
  + - An extra column is needed to the right of each inputfield (e.g. for registration, metadata input, etc), to hold some short explanation of the meaning of the field. Pop-up help screens are used for full explanations. Add a 'more..' link to the short explanation as a link to the the full help text. (So there are two versions of the helptext for each field; a short one inscreen and a longer one in a popup.)
  + If anything is wrong with input fields, please indicate the message(s) as specified above. Specific:
  + - Messages about required fields to be filled in or wrong formatting can be shown at the same time, using a text at the top of the page concerned, plus messages above the field(s) concerned.
  + - And mark the labels of the missing fields with a specific style (s.t. we can later make them red for example).
  + - Required fields are indicated with a red \*-sign.
  + - If a certain formatting is required, it is indicated behind (or below) the input field, e.g. (yyyy[-mm][-dd])
  + If anything is wrong with input fields, please indicate the message(s) as specified above. Specific:
  + - Check fields when submitting, not beforehand.
  + - In case of missing/incorrect fields, jump back to the (first) page where it occurs
  + - Messages about required fields to be filled in or wrong formatting can be shown at the same time, using a text at the top of the page concerned, plus messages above the field(s) concerned.
  + - And mark the labels of the missing fields with a specific style (s.t. we can later make them red for example).
* Screen elements
  + Use specific styles for links, for regular texts, for buttons, column headers, page headings, tabs, etc. This makes it easier to add a graphic design later. @Check when graphic design is implemented.
  + All links and buttons should have alt/title texts. @Check when graphic design is implemented.
* Actions
  + Info messages (see messages) should be shown after a save action (e.g. in the workflow screen, when saving a draft, etc.) to provide feedback that the action was successful.
  + After an action (e.g. button) is initiated, disable the button. For potentially slower actions, add a notice in the screen directly, and replace it with the result screen when the action is done.
* Alignment
  + Generally align similar elements, and give them the same length.
* Technological
  + Use image buttons everywhere, as a graphic designer will require that. So no 'input type=submit'. In heavily used forms e.g. search and login; the 'enter' key should still work!
  + Use scalable (resizable) fields wherever possible. Such pages are scalable in window size as well as font size. This also prevents printing problems. So no font sizes in pixels, no fixed table widths but percent’s, etc. Also consider widths of drop-down boxes in which the content can vary. @Graphic design should be made to cope with this.
  + Otherwise assume a screen resolution of 1024x768. @Check when graphic design is implemented.
  + Note: Test in IE as well as Firefox and Safari!
* E-mail
  + E-mails are sent from "DCCD Team" <info@…>
  + Subjects start with "DCCD: ". If it concerns a specific project, its title should be mentioned, e.g.: "DCCD: archiving confirmation for <title of the project>"
  + The header, the first part of the body of the mail, should always be:

<DCCD logo>

Dear <display name>,

* + The footer should always be:

Kind regards,

DCCD Team

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* + @the footer should be updated later.
  + The note above about Texts applies to the header, footer, as well as all e-mail texts.
  + All links should be links with the link name being the same as the link itself, so <a href="url">url</a>. This prevents many link problems due to text wrapping.
* General notes
  + All texts are specified initially English. English is the default language, but we do support four languages and try to have every visible text translated except on the Project TRiDaS edit/view pages.
* Navigation - the navigation mechanism used throughout the site
* Sketch

|  |  |  |
| --- | --- | --- |
| DANS DCCD logo | Search bar, first row | Personal bar, first row |
| " | " second row | " second row |
|  |  | Management bar |
| Page body incl breadcrumb | (also page body) | (also page body) |
| Footer | (also footer) | (also footer) |

* Personal bar
  + Add a bar with to the right top of each screen (like the top bar on www.youtube.com or www.swivel.com).
  + First row:
    - Register

(if not logged in)

links to RegistrationPage

* + - Log In

(if not logged in)

links to LoginPage

* + - <display name> (<user role>)

(if logged in)

user role is shown only for non-regular users, i.e. administrator

* + - Settings

(if logged in)

links to current users' own MemberPage.

* + - Log Out

(if logged in)

leads to the current page (or if that page is not accessible, the HomePage)

* + Second row:
    - My projects

(if logged in, and user is manager of at least 1 project)

Leads to MyProjectsPage.

* + - New project(button)

Leads to UploadIntroPage.

If the user is not logged-in, it refers to LoginPage.

The language switch (flags) have to be positioned in this section, too (more prominent than in Easy).

* Search bar
  + Add a bar with to the left top of each screen (like the persistent search bar on www.youtube.com.).
  + First row:
    - Simple text field
    - Search (button)

If a search is performed, a ResultListPage (objects of archived projects) is shown replacing the current page body.

Show a previously performed query in the text field if a search has already been performed. Clear it when refinement options are used, browse or advanced search is used, or a depositor/archivist browse action is used (my e.g. My Projects)

* + Second row:
    - Home

leads to HomePage?

* + - Browse

Leads to the BrowsePage, which is shown replacing the current page body.

* + - Advanced search

(shown only if logged in)

Leads to the AdvancedSearchPage, which is shown replacing the current page body.

* Management bar
  + If nothing is visible in this bar, it is not shown. So this bar is not shown for non-members. Items shown visually different from other bars.
  + @to be specified. Things like picklists, members, organisations, etc.
* Page body
  + The actual content of the current page.
* Footer
  + @to be specified. Things like help, about/contact, legal texts, etc.
* Breadcrumb
  + Navigation should obviously be possible, e.g. when opening a dataset from search results, one should be able to go back to the search results. This is indicated as "Navigation options" throughout this design.
* Misc
  + Some pages have bookmarkable (stable) URL’s.
  + a DCCD logo at the top left of each screen should be a link to the DCCD HomePage?.
  + {a DANS / RCE logo somewhere in the graphical design should be the link to the DANS / RCE websites?}
  + {the content segment of each page should contain a 'printable version' button.}
  + if a page is requested that the current user has no access to, show the LoginPage.   
    After login the user is redirected to the original requested page.

### Pages

List of pages (i.e. screens)

* HomePage - first page shown when entering the site (see general)  
  But it does contain an introduction text and a map of Europe.
* LoginPage - log in for authentication
* RegistrationPage - registering to apply for membership
* RegistrationConfirmationPage - confirmation of registration
* AccountAccessPage - in case user forgot password
* {BrowsePage - browse contents of the DCCD}
* AdvancedSearchPage - advanced search contents of the DCCD
* ResultListPage - shows a list of search results (currently objects)
* MyProjectsPage - shows a list of projects created my current users
* ProjectPage - shows a project (e.g. one result)
* DownloadPage - shows options when downloading a project
* {UploadIntroPage - displays options for uploading a new project (or projects)}
* UploadFilesPage - options for uploading the various types of file
* MemberListPage - shows a list of members
* MemberPage - shows one member
* ChangeMembershipPage - contacting a member
* ChangePasswordPage - to change member password
* OrganisationListPage - shows a list of organisations
* OrganisationPage - shows one organisation
* NewOrganisationPage - add an organisation

#### LoginPage

##### How to get here

Navigation

* use login link

##### Spec

Title: Log in as a DCCD member

Fields for loggin in:

* Username
* Password
* Button 'Login'

after logging in, the user should be directed to the page where he/she was before logging in. See below.

* Button 'Cancel'

leads back to where user came from, See below.

* Link: 'Can't access your account?'

leads to AccountAccessPage

Note about redirecting the user:

* If 'New project' was used, redirect to UploadIntroPage.
* If an item was selected in a ResultListPage, redirect to the respective ProjectPage .
* In other cases, redirect to the HomePage? .

Fields for registering:

* Link "Not a DCCD member yet?leads to RegistrationPage
* Text "Members have more privileges on this site."

Note: only active members can log in.

#### RegistrationPage

Registering an account to apply for membership.

Note that a username is used to identify an account, to enable multiple accounts on one e-mail address.

See also MemberPage (it's a similar page).

##### How to get here

Navigation

* use Register link

OR

LoginPage

* use Register button

##### Spec

Page title "Registration"

Hint text:

"Registered members have more privileges on this site.

Please fill in your details below. These will be sent to the administrator. You will receive e-mail notification about the approval of your membership."

Fields (all text):

Account

* Username\*
* Password\*
* Confirm password\*
* E-mail address\*

Person

* Title
* Initials\*
* Prefix
* Surname\*
* Function
* Telephone
* DAI

The 'digital author identifier'. Simply a string for now.

Organisation

* <dropdown list>\*

First (default) item: "Choose organisation...". Second (special) item: "<New organisation>". Other items: the existing organisation names (of active organisations) sorted aphabetically.

The remaining fields depend on the selected item:

* + if an existing organisation was selected, the remaining fields display the fields of the selected organisation (so not editable).
  + if <new organisation> was selected, the remaining fields are editable.
* Name\*
* Address
* Postal code
* City
* Country

Entering an organisation name that already exits, leads to a message. "Organisation name <name> already exists. Please select it from the list."Note 'Department' was removed by FZ 25/1.

Settings

@to be specified

Footer:

* Register button (available when required fields are filled in), leads to RegistrationConfirmationPage
* Cancel button, leads back to the home page.

#### RegistrationConfirmationPage

The confirmation message a user gets after registering.

##### Spec

Title: "Registration - approval procedure started"

Information messagebox:

Thank you for your registration. Your details have been sent to the administrator. You will receive e-mail notification about the approval of your membership.

A copy of your account details has been sent to <e-mail address>.

Navigation options: "Continue to homepage"

##### E-mail sent to candidate member

Subject: "DCCD: account details"

<header>

Thank you for your DCCD registration. The account details you supplied are:

<all fields>

Note that your account will not be usable until your membership request has been approved.

Also note that, for security reasons, your password is not included in this message.

<footer>

##### E-mail sent to administrator

Subject: "DCCD administrator: new candidate member <displayname>"

<header>

A new candidate DCCD member has registered. Please approve the membership request here:

<link to memberpage>

Account details:

<all fields>

<footer>

#### AccountAccessPage

##### How to get here

LoginPage

* Link can't access account

##### Spec

Title: Password change procedure

Text:

Please enter either your username or the e-mail address associated with your username below. Instructions on how to change your password will be sent to the associated e-mail address.

Fields:

* Username
* label: "or"
* E-mail address

Buttons: [Send] [Cancel]

##### Instruction message

The message a user gets after using 'Send', starting the password change procedure.

Title: Password change procedure - Instructions sent

<bold>An e-mail has been sent to <e-mail address>. Please follow the instructions in that e-mail to complete the password change procedure.<bold>

Buttons: none

##### Instruction e-mail

Subject: "DCCD: password change procedure for <username>"

In case only one account is concerned:

<header>

You have requested to change your password. If this is not the case, please reply to this mail to report the possible abuse.

To change the password for user name '<username>' (<displayname>), please click this link:

<link>

If clicking this link doesn't work, please try to copy the entire link text into the 'address bar' of your browser (where you usually type a website address to go there).

<footer>

In case more than one account is concerned (e.g. when multiple user names are registered on one e-mail address), send the e-mail for each account.

The screen a user gets using the link in the instruction e-mail is ChangePasswordPage .

#### AdvancedSearchPage

A.k.a. 'attribute search' or 'picklist search'.

Spec

Navigation options:

* If this page concerns a search start (invoked from Navigation): "Back to home page".
* If this page concerns a refinement: "Back to result list".

Title: Advanced search

The criteria are also shown here. See the description at Criteria on ResultListPage .

The body consists of 2 parts.

To admin, the administrator part is shown.

And the general part is always shown.

##### Administrator part

* Status

checkbox options: Archived, Draft

* Manager

dropdown list option: -any-(default), user1, user2,..

The list shows all managers (employ the usual autocomplete + 'Select...' solution, similar to the used in Permission settings on ProjectPage)

##### General part

The specific input fields are shown in three columns. Above it is the full text search field (spanning all columns). Note that the ubiquitous search field (explained in Navigation) is also present at the top.

Any field: [ ]

Column 1

Project

Title: [ ]

Identifier: [ ]

Lab name: [ ]

Category: [ ]

Column 2

Object

Title: [ ]

Identifier: [ ]

Type: [ ]

Creator: [ ]

Generic field: [ ]

Column 3

Element

Title: [ ]

Identifier: [ ]

Type: [ ]

Taxon: [ ]

Here, Project, Object and Element are headings (with a distinct style).

Some of the fields are controlled vocabularies (the attribute list specifies them). Use the same presentation as when editing a project. (For type3a object/element type, autocomplete displays only in the language of the interface and English otherwise.)

@to be specified: help options (to show what these fields mean).

Using the Search button (right bottom) here leads to a ResultListPage to be displayed replacing this advanced search page.

(Note: A Clear button is no longer needed to remove previous input.) (Note: A Cancel button is no longer needed due to the navigation options at the top).

Note: the user can still use the regular search option; it will start a new search (and discard the advanced search segment).

#### ResultListPage

Shows a list of results. There are two versions of a resultlist. One is a list of objects (e.g. the result of searching). The other is a list of projects (e.g. my projects).

##### Assumptions

* It will not be possible to perform operations across projects. So the original idea that there is a list of results (projects/objects) and a separate result (project/object) view, can be restored, although altered somewhat due to discussions.

About searching, as decided 25/6 or before:

* In the cases that an object is part of an other object, only the objects on the 'lowest' level are shown (e.g. the smallest parts).
* An object can be part of more than one project, according to TRiDaS. As this is expected to be hardly used, we assume for simplicity that an object is only part of one project. If it is part of two projects, it will be shown twice (and that need not be adjecent in the result list).
* The entities/attributes specified here are shown regardless of the user role and permissions (these are visible even to non-members).
* A limitation of this approach is that the entities/attributes which were hit by the search criteria can not be shown here, i.e. 'why' this result was found. It may be shown with the result.

##### Result list heading

###### Title

The title of the result list page depends on how the user got here, e.g. the scope of the search.

After browsing and (simple) searching:

* if user is not logged in, scope is 'Archived projects'
* if user is member, scope is 'Archived projects'
* if user is admin, scope is 'All projects'

If the user got here through the My Projects in the navigation, the scope of course is 'My Projects' too.

###### Criteria

(No more "Showing <B>37</B> results" stuff.)

A criteria section is always shown, specifying the chosen scope and search criteria.

It is formatted as: "Criteria: <scope> | <criterium1> | <criterium2>"

(Note that no '>' sign is used as separator and the criteria should also not be links. The reason is that this is not a breadcrumb.)

* The scope is an indication that is consistent with what is described above about the title, e.g. 'My projects'
* The criteria due to simple search (or refine) (and also in case of the 'any field' in advanced search) are shown as 'Search: <query>', e.g. 'Search: example western ship'

So each search action leads to one criterium (reflecting the entire query specified).

* The criteria due to advanced search (or refine) on specific fields (so except the 'any field') are shown as '<key>: <value>', e.g. 'Object title: bat\*'
* So each advanced search action may lead to more than one criterium (one for each field specified).

Note that options from the Administrator part should also be shown as criteria here.

* The criteria due to browse (or refine) are also shown as '<key>: <value>', e.g. 'Status: draft'.

Criteria can be removed using an 'x' sign after it. Note that this should be possible for all criteria, but never for the scope.

###### Exceptions

In case a list has no contents:

No results found matching your criteria.

In case some error occurred (due to wrong input, for example), show (in error message box):

No results found.

<error message>

In the above cases, append a text link "Can't find what you're looking for?", linking to a help page about search (public fields, scope, syntax)

###### Display

Display options are:

* Show as: Objects (<nr>) | Projects (<nr>)

The default depends on the scope (as reflected in the title, see above):

* Objects are shown when scope is Archived projects
* Projects are shown when scope is My projects or All projects

###### Sorting

Sorting is done above each column. To be precise;

* Sort by: Relevance | Object Title | Project Title | Archive date

Default sort by project title (if projects are shown) or object title (if objects are shown)

Relevance is only applicable in case a search has been performed. In that case it is the default sorting.

* Save date | Status

If results contain >1 project that is not archived (depositor is probably looking in My Projects, or user is an archivist).

In that case, default sort by Status, after Archive date, after Save date. So a user will see drafts first (sorted newest-first), and below it archived projects (sorted newest-first).

An arrow up or down next to the sort criterium indicates the state of these toggles (clicking alternates): ascending or descending. Sort descending on relevance by default.

If a second sort criterium is chosen after the first one, results are first sorted according to the current (second) criterium, then on the previous (first) criterium. This doesn't need to be visualised (it's the way e.g. Windows Explorer works).

p.m. Sorting may also 'group by'.

###### Result list refining

Refining consists of these options:

* [ ] [Search]

Invoking the Search-button adds another 'any field search' to the search criteria and displays the updated ResultListPage .

* Advanced search

This link leads to the AdvancedSearchPage , where an advanced search can be formulated (adding it to the current criteria).

* A number of fields on which browsing is often performed are shown here, with values. Selecting a value (link) adds it to the criteria and displays the updated ResultListPage .

@To be specified: which fields? See BrowsePage .

* Browse more...

This link leads to the BrowsePage , where one of the elaborate browse options can be used to select a value (adding it to the current criteria).

###### One list item -objects

An item in the result list is shown as follows:

Object '<object title>'

Type: <object type>

Project '<project title>'

ID: <project identifier> (domain: <project domain>)

Lab(s): <lab name>, <lab place>, <lab country>

Type(s): <type normal>

Category: <category normal>

Description: <project description>

The object title and type reflect the object is-part-of object structure. So a floor that is part of a church will be shown as "church, floor"

In the list a search result "church x, floor 1" may be followed by a search result "church x, floor 2".

Project description can be a long text, cut it at 200 char. When truncation was used, replace last part with [...].

The permission indication shows information about the status of the object with regard to the user role and permissions of the current user:

* Full access (green)

if the current user is authorised up to the values level

* View access (orange)

cases in between

* No access (red)  
  if the current user is not authorised at all

Clicking the search result leads to its ProjectPage for logged-in users. To users not logged in, it leads to the LoginPage.

###### One list item -projects

On project item is shown almost as one object item, with the main difference that the object fields removed (i.e. the first few fields). To avoid duplication with the object list item spec above, the skeleton is shown here:

Project '<project title>'

ID:

Lab(s):

Type(s):

Category:

Description:

Status

Above the list item, a status is shown. It is displayed only when it concerns a project maintained by the current user (or user is admin). Status is shown distinctly, e.g. italic.

The content depends on the status:

* Status: draft saved <save date>
* Status: archived <archive date>

@to be specified

###### Result list footer

Paging

Show 50 search results on a page. Use pagination like Funda. Example:

< Previous 50 | 1 | ... | 5 | 6 | 7 | 8 | 9 | ... | 23 | Next 50 >

Show the current page marked somehow, e.g. bold.

If there is only one page of results, don't show the paging segment.

Browsing through the result pages, you'll see a 'window'(subset) of page numbers:

* On page 1, pagenr 1-5 are shown

1 | 2 | 3 | 4 | 5 | ... | 23

* On page 7, pagenr 5-9 are shown

1 | ... | 5 | 6 | 7 | 8 | 9 | ... | 23

* On page 23, pagenr 19-23 are shown (if 23 is the last one)

1 | ... | 19 | 20 | 21 | 22 | 23

So the 'window' of pagenrs visible has shifted. Also watch the '...'s. They show there are more pagenrs before or after the sequence. To the left, the first page (1) is always shown, and to the right, the last page (23 in this case).

For navigating the result pages, use links (navigation is done using links). Show these only when there is a previous resp. next page.

E.g. to the left of the resultpagenumbers:

< Previous 50 |

and to the right:

| Next 4 >

(Next usually indicates 50, but in the example above there are only 4 items on the 23rd page).

#### MyProjectsPage

List projects managed by current user (this need not be the same as the uploader).

This is a ResultListPage (with project items shown, both draft and archived items).

#### ProjectPage

Shows one result in detail (of a result list).

This contains two views, a left view showing the result structure and a right view showing the details of one item in the structure.

##### ProjectPage (view)

###### How to get here

Navigation

* Menu item My Projects

MyProjectsPage

* select project

OR

ResultListPage

* select object

###### General

Navigation options:

* If the project was found using search: "Back to result list" (if that list is paged, to the right page).
* If the project was opened from My Projects: "Back to My Projects" (if that list is paged, to the right page).

Title: "Project '<title>'"

###### Initial settings

When a project is created, these are the default settings:

* The current manager of the project is set to the member who uploads the project. The member data are also copied (s.t. it can always be determined who was the original uploader).
* The current legal owner of the project is set to the organisation of the member who uploads the project. The organisation data are also copied (s.t. it can always be determined who was the original legal owner).

###### Header

* Shows status to the projects' manager (or admin), which is either:
* Status: draft saved <save date> [Edit] [Archive...] [Delete]
* Status: archived <archive date>

Edit leads to Edit version of this page, see below.

Archive leads to Archive validation, described below.

Delete shows a confirmation alert.

* Shows permissions to the projects' manager (or admin), to the right of the status section:
* Default permission level: <level>
* Exceptions:

<displayname> (<username>): <level>

...

These exceptions are a listbox, three rows high (whatever fits). Example:

Henk de Vries (henkdv): object

Piet Pietersen (piet1): none

Jan Jansen (jjansen): value

* [Edit permissions]

Leads to Permission settings, described below.

* Shows a download section.
* If user has permission on the values level, show an infomessage: "You have permission to the level of tree-ring values for this project." Show a 'Download' button below it. It leads to the DownloadPage .
* {If user has no permission on the values level, the project is not downloadable. Show an infomessage: "You are currently authorised to view no more than the '<entity>' level of this project. To download, you need permission to the level of tree-ring values."

[Temp solution] "Please contact the projects' manager <display name> to request permission: <mailto link>."

[Nicer solution] Show a button below it called: 'Request permission'. Request permission leads to Permission request, see below.}

* {If user is the manager of the project, instead always show infomessage: "Note: you are the manager of this project." Show a download button below it.}
* Language: <language> [Change]

This part is shown to the current manager of the project (and to admin). Leads to an intermediate page, see below.

* Manager: <display name> [Change]

Where the name is a link to the member's page.

Change option is shown to the current manager of the project (and to admin). Leads to an intermediate page, see below.

* Legal owner: <organisation name> [Change]

{Where the name is a link to the organisation page.}

This part is shown to admin only. {Leads to an intermediate page, see below.}

###### Result structure view

The project structure is shown as a tree. In case a specific object was selected before entering the projectpage, make the object (result) the 'current entity'.

All entities are shown in the tree, regardless of user permissions. (decision FZ/RM 19/3).

Example: If object Verdieping2 (the result) is part of object Huis is part of project Opgraving Dorpje Utrecht, the following will be shown (assuming one has permission to the elements level, so not to the levels below):

Opgraving Dorpje Utrecht (project)

Huis (object)

[-] Verdieping2 (object)

[-]Kast (element)

[+](sample)

[+](sample)

[-]Tafel (element)

[+](sample)

[+](sample)

...

The name of the entry in the tree depend on permissions:

* <entity title> (entity level)

if user has permission on this entity level

* (entity level)

if user doesn't have permission on this entity level

If possible, use an icon in the tree to indicate the entity level.

For now, only show the path to the project this object is part of. @p.m. Also show siblings of this object and of entities higher in the tree, for sideways navigation.

Above, the tree has been expanded to the sample level. By default, expand to the level the user has permission to.

The [-] indicates an 'expanded' item in the tree, i.e. it shows all that's below it. A [+] would indicate a 'collapsed' state. (The [-] and [+] can be clicked to toggle). No indication means that there are no items in the tree below it that can be expanded/collapsed (either because there are none, or they can not be collapsed).

{Selecting an entity will expand the level below it only. And selecting it again does not collapse it.}

All entities shown in the tree can be selected, one at a time. That entity becomes the 'current entity' (and will be marked accordingly). This causes the result details view to be updated.

###### Result details view

Shows the details of the current entity.

In general, the attibutes of an entity are only shown when the user is authorised for that entity level. There are two exceptions, because projects and objects are always shown in the tree.

* If a project is selected, and the user is not authorised, only the 'open access' attributes of the project are shown.
* If an object is selected, and the user is not authorised, only the 'open access' attributes of the object are shown.

If the user is not authorised on the level of the current entity, no details of the entity are shown. Instead a message is shown in-screen:

You are currently authorised to view no more than the '<entity>' level of this project.

To view these details, you need permission on at least the '<level of current entity>' level.

Please contact the projects' manager <display name> to request permission: <mailto link>.

{p.m. A Request permission button, which leads to Permission request, see below.}

**P.M.**

p.m. Marking the entities and/or attributes in which a 'hit' was found, i.e. a match with the search criteria.

##### ProjectPage (edit)

Edit version of the project page (applicable only to draft projects). Note that permissions are edited elsewhere. See also AdjustProjectUc

Header:

* Shows status to the projects' manager (or admin), which is:
* Editing: draft saved <save date> [Leave edit mode]

Leave edit mode returns to regular version of ProjectPage (see above). This acts the same as navigating away, see below.

Result structure view

* The structure is shown in the same way as the regular version of ProjectPage . {But because this is edit mode, it is useful to indicate the items in the tree that contain errors (e.g. with a red marking). Otherwise they may be hard to spot in the project structure (or are spotted later, when archiving shows validation errors).}   
  Introduce an 'expand all' option to open up the tree.

{p.m. Show entities above entities that contain errors differently (e.g. with an orange marking), or introduce an 'Error view' of the tree, that shows only branches containing errors.}

Result details view

* Show messages at the top of the right pane.

These are the same messages shown at Archive validation, e.g. messages about wrong format of a field, missing required field, but also the messages about lists {(possibly with the option to suggest a term, see archive validation). Show these messages as soon as they are detected (e.g. on load or on save). If a specific field is to be indicated, use the syntax of a tree e.g. "a > b #2 > c"}

{Variations of the warning messages about ID are used here:

If the project has an ID that is the same as an existing draft project (of this user), show a note about this fact.

[temporary version] Message: "The project has the same ID <ID> as one of your other projects, e.g. '<title>'. (You may have multiple drafts with the same ID, but only one version can be archived at any given moment.)"}

If the project has an ID that is the same as one of the archived projects in the system, show a note.

[temporary version] Message: "The project has the same ID <ID> as the existing, archived project '<project title>'. {(You may have a draft with this ID, but you will not be able to archive it.)"

p.m. Messages to be changed if versioning is implemented.}

* Show the right pane of the tree (attributes) editable.

Repeatable fields are shown in the same way as Easy deposit screens: using a '+' a field is added, using '-' it is removed. Normally, input fields are initially shown. The following exceptions are made for attributes that are both repeatable, optional, and composite (they consist of more than one key/value).

If the attribute is optional, it is initially shown in state1: no input field is shown (just a label an the '+'). If the '+' is used, the attribute is shown in state2.

If the attribute is mandatory, it is initially shown in state2: the input field is shown (or multiple fields if it is composite). It has a '-' if the attribute is optional (using it returns to state1). And it has a '+' if the attribute is repeatable (using it repeats the attribute; the last occurrence has the '+' to add more, and each occurrence has a '-' to remove it).

(All input fields have a help column on the right, see Global)

All input fields are textinput fields. One exception is the GML field. It is a textarea, with a message below it: "Warning: incorrect GML inserted here will be discarded. Please check after saving."

* An other exception are lists:**NOTE: type1-3 definitions need to be specified in more detail either in Trac or referenced to a document!**
* Enumerations (type1). These are shown as a drop down listbox (the first and default item is "Choose...").
* Lists in DCCD (type2). These are shown as an autocomplete field, which allows to input terms not in the list. Also show a button [Select...]
* Controlled vocabulary (type3a: Vocabulary object\_element types). These are shown as an autocomplete field, which allows to input terms not in the list. (The autocomplete shows items in the projects language only, or English otherwise.) Also show a button [Select...]
* Controlled vocabulary (type3b: Taxon Catalogue of Life). These are shown as an autocomplete field, which allows to input terms not in the list. Also show a button [Select...]

Select opens a dialog (pop-up?), which shows the full set of possible terms (either a list, table or a tree). Each item is a link; selecting it returns (closes dialog) and displays the selected value in the input field. In the case of the table (showing 4 languages plus descriptions), each cell is selectable (not each row), to be able to select a specific term. (The dialog itself has a Close button).

* Show a Save button at the top and bottom of the right pane. (Allow saving even if there are errors.)
* When navigating away (to an other entity or some other part of the system), if any changes were made, show a dialog.   
  {It has two flavours. One is shown when the page is unloaded (a line of text is put above and below the message text). In this case the text is: "There are unsaved changes in <entity type> <entity name>. Changes will be discarded when you continue." The other flavour is shown when the page is not unloaded but an ajax action is initiated. In this case the text is "Are you sure you want to navigate away?", a newline, the text of the other flavor, a newline, "Press OK to continue, or Cancel to return.".

(Better would be: "Save changes you made to <entity type> <entity name>? [Yes] [No] [Cancel]" where Yes saves changes and navigates away. No doesn't save changes and navigates away. Cancel does not navigate away.)}

pm: Editing metadata structure

pm: Uploading value/associated files at a specific entry.

Uploading value files may lead to format validation errors (invalid files are discarded). The interface should only allow associated files at entities that have a file element in TRiDaS (project, object, element, sample). Note that uploading value/associated files here creates implicit coupling. Removing these files removes implicit coupling.

##### Related pages

NOTE Described on Trac, but not implemented: Change language, Suggest term, Permission request.

###### Change manager

Title: Change manager - <project title>

Message shown in case this function is invoked by a member (the current manager): "Warning: this setting transfers management rights to an other member; you will not be able to maintain this project anymore."

Fields

* Current manager: <display name>

Where the name is a link to the member's page.

* New manager: [ ]

The entry field is an autocomplete list.

If this function is invoked by a member, the list shows only other members within the same organisation (the member belongs to according to member settings).

If this function is invoked by admin, the list shows all members.

Footer:

* Save

save changes

leads back to ProjectPage, in case admin invoked this function

leads back to My projects, in case a member invoked this function (to cope with the rare case that the member is not allowed to view the project anymore).

* Cancel

leads back to ProjectPage

###### Change owner

Title: Change legal owner - <project title>

Fields

* Current legal owner: <organisation name>

Where the name is a link to the organisation page.

* New legal owner: [ ]

The entry field is an autocomplete list.

The list shows all organisations.

Footer:

* Save

save changes

leads back to ProjectPage

* Cancel

leads back to ProjectPage

###### Archive validation

Title: "Archiving project '<title>' - Validation"

Message: "Archiving a project will make it visible to other users (respecting the permission levels you indicated)."

Schema validation

If there are any schema errors, show message: "The project seems not to be entirely complete/correct. Please correct the problem(s) cited below."

Show a list of feedback messages, indicating what is wrong w.r.t. the schema expected (e.g. required fields).

p.m: It is a list of two columns, one containing the message and one an optional button.

{In case of invalid terms, the message is: "The term '<term>' is not part of the options for '<list name>'." (where list name is the same as in the project editor).

For lists for which terms can be suggested, the message continues: "Please suggest this term on the <link>VKC website</link>" (links to the relevant place on the VKC site)

p.m.: "You may suggest this new term." with a button [Suggest term] in the right column (leads to page described below).}

Validate project id

If the id is the same as one of the archived projects in the system, show a message here.

[temporary version] Error message: "The project has the same ID <ID> as the existing, archived project '<project title>'. In order to archive your project, you can go back and adjust the project ID." (continuing is not possible)

[when versions are implemented]

* {In case the archived project is also managed by the current member / owned by the current members' organisation, show a warning message: "The project has the same ID <ID> as the existing, archived project '<project title>'. Continuing archiving the project will add it as a new version of the existing project. Alternatively, you can go back and adjust the project ID." (so continuing is possible).}
* {Otherwise show an errormessage "The project has the same ID <ID> as the existing, archived project '<project title>'. That project is neither managed by you or owned by your organisation, so you are not allowed to add a new version of the existing project. In order to archive your project, you can go back and adjust the project ID." (continuing is not possible).}

License

"In order to archive a project, you must accept and understand the <link>License Agreement</link> (PDF).

{Please note that this agreement includes that:

o <text>

o <text>}

[check box] Yes, I accept and understand the License Agreement.

Note: the license agreement file will also be sent to you in an e-mail confirming your deposit action."

Footer:

* Cancel

Leads back to the ProjectPage.

* Finish

(only enabled if no errors above and license accepted)

Leads to Archive confirmation.

###### Archive confirmation

Title: "Archiving project '<title>' - Completed"

<bold>Thank you for providing your project. A confirmation has been sent to your e-mail address (<e-mail address>). It contains important details.<bold>

Footer

* Continue to project

Link

###### Archive confirmation e-mail

Subject: "DCCD: archive confirmation for <project title>"

@adjust the text temporarily to the lack of versioning. The "Implementing changes" section becomes: "To implement any changes to the metadata or upload complementary files, either now or in the future, you can create a new project again. Note however, that it is currently not allowed to archive a project which has the same ID as an existing project."

@adjust the text below to the persistent identifier policy.

<header>

Thank you very much for submitting your project '<project title>' to DCCD. This e-mail contains more information regarding availability, implementation of any changes, your data’s permanent findability, and the License Agreement.

<heading>Availability</heading>

Your project is now available to the public, according to the permissions indicated by you. DCCD guarantees that your data will remain accessible and safely stored for the long term.

<heading>Implementing changes</heading>

To implement any changes to the metadata or upload complementary files, either now or in the future, you create a new project again. If it has the same ID when you try to archive it, you have the option of creating a new version of the project. Previous versions will also remain accessible.

<heading>Permanent findability</heading>

You can include the following link in your paper or electronic publication to refer to your dataset:

http://persistent-identifier.nl/?identifier=urn:nbn:nl:ui:13-z5c-sv0

We also ask those who refer to your dataset in their publications to include this link. It contains a 'Persistent Identifier', which is coupled to your project and ensures that it will also remain findable via the internet in the long term.

Note: This link will not yet work until the day after which your dataset has become available to the public.

<heading>License Agreement</heading>

Attached is a copy of the License Agreement with the terms and conditions such as agreed to by you and DCCD when you deposited the data.

<footer>

###### Permission settings

This page has an editable variant of the permissions shown with a project (see above).

Title: Permission settings - <project title>

Fields

* Default permission level

[<level>V]

Dropdownlist of levels. By default shows the currently set level.

* Exceptions

Member: [ ] [Add]

|  |  |
| --- | --- |
| <displayname> (<username>): <level> | [Choose level..V] [Apply] |
| <displayname> (<username>): <level> | [Remove] |
| <displayname> (<username>): <level> |  |
| ... |  |

This list contains a limited set of users that were manually added (see add function) to specify exceptions to the default permission level. If there are no exceptions (yet), don't show the list and its buttons.

The entry field for user is an autocomplete list; see OldEasy?. The autocomplete should (everywhere it is used) include the 'Select...' option to display the fill list.

These exceptions are a multiple selection listbox, ten rows high (whatever fits).

Remove is applied to the selection.

Apply applies the chosen level on the selection. The dropdown shows a default nonfunctional item, and below it the levels.

Remove and Apply are disabled if no item was selected in the listbox.

{A sketch of this section can be found at the bottom of this page.}

* Message: "About the permission levels:

'Maximum security': public metadata is shown and can be searched. All other content is inaccessible. The public metadata consists of:

* Project title
* Project identifier
* Project type
* Principal investigator
* Period of research
* Type of material that was studied (archaeology, ship’s archaeology, furniture et cetera)
* Laboratory
* Object title

The 'Project' to 'Series' permission level: in addition the entire content of the selected TRiDaS level is shown and can be searched, with the exception of privacy-sensitive information.

The 'Values' permission level: this level permits downloading of complete project files, including measurement series and associated files, in TRiDaS XML and other dendrochronological data formats.

The levels are:

* Maximum security
* Project
* Object
* Element
* Sample
* Radius
* Series
* Values (download)

Footer:

* Save

save changes

leads back to ProjectPage

* Cancel

leads back to ProjectPage

#### DownloadPage

Shows options when downloading a project.

Note: it is not possible to download more than one project at once.

Navigation options: Back to project

Title: "Download project '<title>'"

Metadata and values are provided in TRiDaS format.

Additionally, download values in format:

[ <none> V ]

Format shows a dropdown list of value file formats (Tuscon RWL, Heidelberg, etc). The first, default value is "<none>"

Default radiobutton is 'none'

Include:

[ ] Original value files

[ ] Associated files

{[ ] DCCD adminstrative data}

{[ ] DCCD usage comments}

If any of these is not available (i.e. nothing additional would be downloaded), then disable that option.

{Display each option only if these files/data are actually available.}

Checkboxes default off.

License

<text>

[ ] Yes, I accept the terms and conditions stated above

[Download] [Cancel]

We don't have a license text yet.

The Download button is only enabled if the 'Yes, I accept..' is checked.

The download is delivered as one zip file. Original files have names with \_original suffixed (before the file extention), to separate them from converted value files.

Note that if the user doesn't want all these files in one bunch, he/she can download the project several times, selecting different download settings each time. This in order to avoid paths in zip files, that casual users may have trouble with.

#### UploadFilesPage

This page is used for uploading/managing the various types of file.

Note that the UploadIntroPage is not implemented!

Notes:

* This page is only used if uploadtype is "existing TRiDaS file" (i.e. the first uploadtype on the UploadIntroPage ).
* The design is s.t. the user has to correct broken couplings here (i.e. files referenced in the TRiDaS but not uploaded yet, or file uploaded but not referenced in the TRiDaS)
* Multiple files are uploaded as one zip-file. So potentially 3 zip files are to be uploaded (one containing metadata files, one containing value files and one containing associated files). Ignore 'paths' in zip files.
* Only files of one value format can be uploaded with one upload action.
* It is not supported to upload new TRiDaS file for a project, once is has been created. (Editing metadata will be supported.) It will, however, be possible to start a new upload, uploading TRiDaS of the same project again. But that will become a separate project, so changes made after uploading the earlier project, e.g. the uploaded value/associated files, permission settings, metadata edits, etc., will have to be done again.
* {It is not supported to switch upload type once a project has been created. (The upload type is remembered with the project.)}
* It is not supported to view all couplings of a project, or a list of all uploaded files.
* {It is not supported to 'automatically' couple files to the project level (if no references were indicated in the TRiDaS). The user can upload file(s) manually at the desired entity.}
* The interface allows editing metadata that was originally uploaded as TRiDaS.
* {The interface (with some adjustments) makes it possible to batch upload (TRiDaS) with associated files. The couplings in the TRiDaS indicate what belongs with what project. Using the same mechanism is would be possible to batch upload value files (but this is currently not supported).}
* For now, we don't provide an option to remove uploaded files. A convenient temporary choice for now is that reuploading a file with the same name as a file previously uploaded (within the same upload session, of course) will overwrite the previously uploaded version. In this way, the user can correct minor mistakes. For other corrections, e.g. a file not supposed to be uploaded, the user will have to restart the upload process from scratch.
* For now, we assume no batch upload can be done. Some features needed for batch upload are included, see the notes '[For batch upload]' below. But still, this design has to be altered here and there to fully support batch upload.

A notable consequence is that we can temporarily simplify the system by allowing only one, correct TRiDaS file to be uploaded, after which it will not be possible to alter it or upload an other file (upload section disappears). If the user uploads an incorrect file, the upload process will have to be started from scratch. An upload of one project only is assumed to be relatively small in size, so the user doesn't loose much time because of this.

* Note that in the warning/error sections below, one message is shown per file. In case of a zip file, this concerns the files extracted from the zip file.

Depending on conditions, this page consists of these parts:

* Header
* Part for managing metadata
* Part for managing value files
* Part for managing associated files
* Footer

##### Header

Page title: "Upload TRiDaS"

##### Part for managing metadata

(Shown in the order indicated here)

* Title "TRiDaS metadata file"
* Hint

If no (correct) file has been uploaded, show a hint here. (Otherwise, show no message.)

Message: "Please upload a TRiDaS file."

* Warnings

(if there are no warnings, don't show the warnings container, nor 'ok' or something.)

* Schema validation warning

Checks for correct TRiDaS. Invalid metadata files are discarded. (A less strict variant of the TRiDaS schema is used here, that is strict enough for my dccd, but not for archiving)

Message: "File '<filename>' was not uploaded, because it is not a valid TRiDaS XML file. Please correct the file and upload it again.".

Note that this warning is also triggered when the user attempts to upload a zip file here.

[Nice to have] If possible, provide feedback in the message about what is wrong w.r.t. the schema.

* [For batch upload] Double upload warning

It is not possible to have 2 or more metadata files with the same name.

Message: "File '<filename>' was already uploaded; the previous version was overwritten."

* Double reference warning

It is not possible to have 2 or more references to the same value/associated file (leads to complexity, e.g. when removing the file).

If this occurs within the metadata of one project file, discard the project file.

Message: "File '<filename>' was not uploaded, because contains more than one reference to the file '<filename>'. Please correct the file and upload it again."

[For batch upload] If this occurs across project files (i.e. in a batch upload of more than one project, and the references are not part of the same project), discard the project file(s) involved.

Message: "Files '<filenames>' were not uploaded, because they contain references to the same file '<filename>'. Please correct the files and upload them again, or upload the files one at a time."

* Same ID warning

If a project has an ID that is the same as an existing draft project (of this user) or an other project being uploaded, show a note about this fact (F049).

[temporary version] Message: "File '<filename>' has the same ID <ID> as one of your other projects, e.g. '<title>'. (You may have multiple drafts with the same ID, but only one version can be archived at any given moment.)"

If the ID is the same as one of the archived projects in the system, show a note.

[temporary version] Message: "File '<filename>' has the same ID <ID> as the existing, archived project '<project title>'. (You may have a draft with this ID, but you will not be able to archive it.)"

p.m. Messages to be changed if versioning is implemented.

* "Current file: <filename>"

Only shown if something was uploaded already.

(Note that the upload component provides a log of uploads, not the current file).

{[For batch upload], this would become a list of files already uploaded, if any. Uploading a zip should be supported then.}

* Upload

This section is only shown if no (correct) file was uploaded yet.

* "Language:" <dropdown list of languages>

This consists of a shortlist, a dashed line (a seperator), and a complete list of languages

The shortlist now consists of the European languages.

* An option to browse for one file on the local computer, and button to upload it

##### Part for managing value files

Shown if it has been detected that the TRiDaS contains links to value files.

(Shown in the order indicated here)

* Title "Value file(s)"
* Warnings

(if there are no warnings, don't show the warnings container, nor 'ok' or something.)

* File format validation warning

Checks for correctness with respect to the selected value format. Invalid files are discarded.

Message: "File '<filename>' was not uploaded, because it appears not to be in the correct <format> format."

* Double upload warning

It is not allowed to upload 2 or more files with the same name.

Message: "File '<filename>' was already uploaded; the previous version was overwritten."

{[For batch upload] Files with the same name are not even allowed in differing projects within a batch upload (because it can not be determined which file belong with which reference).}

* Unexpected files warning

Show a message when there are unexpected files, i.e. uploaded but not referenced in the TRiDaS. Because there is no remove option, we must discard the file(s).

Message: "The following file(s) were discarded: <filenames><br>These files are not referenced in the TRiDaS metadata. (If the metadata file is not correct, please start a new upload procedure.)"

As these <filenames> may become quite a list, only show the first 10 or so (what fits).

* Errors
* Expected files error

Show a message when there are expected files, i.e. referenced in the TRiDaS but not uploaded yet.

Message: "Please upload file(s) <filenames><br>These files are referenced in the TRiDaS metadata, so they must be uploaded. Note that zip files are supported to supply multiple files at once. (Alternatively, you can upload an adjusted metadata file by starting a new upload procedure.)"

As these <filenames> may become quite a list, only show the first 10 or so (what fits).

* "Current file(s): <filenames>"

Only shown if something was uploaded already.

{[Nice to have] As these <filenames> may become quite a list, only show the first 10 or so (what fits), and a button [Show files].

(Note that the upload component provides a log of uploads, not the current file, and not the contents of a zip file).}

* Upload
* "Format:" <dropdown list of value file formats>

(Tuscon RWL, Heidelberg, etc)

* An option to browse for one file on the local computer, and button to upload it

##### Part for managing associated files

Shown if it has been detected that the TRiDaS contains links to associated files.

* Warnings

same as above, except file validation (not applicable).

* Errors

same as above.

* Current files

same as above.

* Upload
  + An option to browse for one file on the local computer, and button to upload it

##### [Temporary] hint part

If links to files have not (yet) been detected, show a message:

Title: How to couple value/associated files

Refer to these files in a TRiDaS file.

Inside each "measurementSeries" xml element place a "genericField" xml element that specifies the measurement values file to use.

Example for a Tuscon file with the name "mydata.rwl": <genericField name="dccd.treeringdatafile">mydata.rwl</genericField>

The upload mechanism will detect this and ask for the files it refers to.

##### Footer

* Hints  
  If there are errors above, include a hint here. (Only if there are errors; otherwise, show no message.)  
  Message: "Finalising the upload procedure will be possible once at least one TRiDaS file has been uploaded correctly."
* [Temporary: remove this option: ] Back –button  
  Leads back to the UploadIntroPage  
  Show a dialog if any files were uploaded.Message: "Do you really want to go back to the start of the upload procedure? This will discard the files you uploaded. [OK] [Cancel]"
* Cancel –button  
  Show a dialog if any files were uploaded.Message: see navigating away (below)
* [Temporary] Finalise and Upload another –button  
  Only available if there are no errors above (and at least a metadata file was uploaded).  
  The project(s) is/are actually created, and the user is redirected to this page again to add another TRiDaS.
* Finalise –button  
  Only available if there are no errors above (and at least a metadata file was uploaded).  
  The project(s) is/are actually created (will appear in My projects). Leads to MyProjectsPage (in case uploadtype multiple TRiDaS) or leads to ProjectPage (edit) otherwise.
* Navigating away (from this page, e.g. by clicking some other link in the site, except the buttons 'back', 'restart' and 'finish' of course)  
  Show a dialog if any files were uploaded.  
  Message: "Do you really want to leave the upload procedure? This will discard the files you uploaded. [OK] [Cancel]"

#### MemberListPage

##### How to get here

pre: member or admin

Navigation

* Menu item Members

##### List heading

@to be specified (sorting/grouping)

For now, default sort by Status, after Surname. So an admin will see candidates first (sorted by surname), below it active members and finally deleted members.

##### One list item

Shown as a table row.

For regular users, only active members are shown.

Fields: Surname, Display name, Organisation name

To an archivist, members with any status are shown.

Additional fields: Username, Role, Status.

Selecting a member leads to the MemberPage .

##### List footer

@to be specified (paging)

#### MemberPage

See also RegistrationPage (it's a similar page).

##### MemberPage /-own

How to get here

MemberListPage

* select member

OR (getting to your own page)

Navigation

* use Settings link

###### Spec

Navigation options: (above title)

* only when user came from MemberListPage: "Back to member list" (if that list is paged, to the right page).

Title: Member <displayname>

Status segment

(shown for admin only)

* Status: candidate [Activate] [Delete]
* Status: active [Delete]
* Status: deleted [Restore]

Activate: member can not be activated if the organisation is not active. Dialog: "The organisation <name> is not active. Activating this member will activate the organisation, too. Continue?" [Yes][No]

[When 'my dccd' works] Delete: a member can only be deleted if there are no projects he/she manages. Message: "Member <name> can not be deleted because there are still projects being managed by this member."

Activate, Delete lead to an intermediate page ChangeMembershipPage .

Restoring sets status back to candidate (that's why it has no intermediate page). Nice to have: restoring a member sets its status back what it was to before deletion.

Fields

* All fields from the edit-version below are displayed here, not editable.

Footer:

* Edit (member him/herself, or administrator)

leads to MemberPage (edit)

* Change password button (member him/herself, or administrator)

leads to ChangePasswordPage

* Delete my account button (member him/herself, or administrator)

see Delete function for administrator above.

##### MemberPage (edit) /-own

###### How to get here

MemberPage

* use Edit button

OR in admin can use a direct link in candidate member email notification (see RegistrationConfirmationPage )

###### Spec

Title: Member <displayname>

All fields are displayed editable, as in the RegistrationPage , with the following changes:

Account

* Role

(additional field for admin only)

radio buttons: data-user (default), administrator

* Username

shown, but not editable here

* Display name

additional, not editable field, displaying full member name

* Password, Confirm password

these are not shown at all

Organisation

* <organisation name>

option for non-admin only.

just a text, not as a link

* <dropdown>

option for admin only.

this is the dropdown shown on RegistrationPage (without the special items).

current organisation is default selected in the dropdown.

Normally only active organisations are shown here. If the current organisation is candidate, it too is shown in the list (selected).

The list is sorted bij organisation name.

* in any case, the value of organisation has no label 'Name'
* (no other fields of the organisation are shown here)

Footer:

* Save, changes are saved

leads (back) to MemberPage

* Cancel button, changes are not saved, leads (back) to MemberPage

#### ChangeMembershipPage

Intermediate page for admin to facilitate user notification of changes in account. Besides this, of course other communication between depositor and admin should occur outside of the system.

##### Spec

Title: "Contact member <displayname>"

Fields:

* Subject

textfield

default values: see e-mail to member, below.

* Message

textarea

default value: see e-mail to member, below.

Footer:

* Send

status is changed, e-mail is sent to member

leads (back) to MemberPage

* Don't send

status is changed

leads (back) to MemberPage

* Cancel

leads (back) to MemberPage

##### E-mail to member

The message default text depends on the action that was taken:

###### Activate

Subject: "DCCD: account activated"

Default message:

<header>

Your membership account '<username>' has been approved. You are now able to log in to DCCD.

You may use this direct link:

<link>

<footer>

###### Delete

Subject: "DCCD: account deleted"

Default message:

<header>

Your membership account '<username>' has been deleted. You will not be able to log in to DCCD using this account.

<footer>

#### ChangePasswordPage

##### How to get here

MemberPage

* use change password button

OR

* using link in e-mail, received during RetrievePasswordUc .

##### Spec

###### New password

Title: Password change procedure - New password

Fields:

* Username (not editable)
* Display name (not editable)
* Old password (editable)

only when change password button was used, so not in the forgotten password scenario

* New password (editable)
* Confirm new password (editable)

Buttons: [Save] [Cancel]

###### New password confirmation

The confirmation page a user gets after saving the new password.

Title: Password change procedure - Completed

<bold>Your password change procedure has now been completed.<bold>

Continue to the <a>home page</a>.

Buttons: [Log In]

#### OrganisationListPage

##### How to get here

pre: member or admin

Navigation

* Menu item Organisations

##### List heading

@to be specified (sorting/grouping)

For now, default sort by Status(Candidate, Active, Deleted), after Name.

To an admin, a button 'New organisation' leads to NewOrganisationPage .

##### One list item

Shown as a table row.

For regular users, only active organisations are shown.

Fields: Name, City, Country

To an administrator, organisations with any status are shown.

Additional fields: Status.

Selecting an organisation leads to the OrganisationPage .

##### List footer

@to be specified (paging)

#### OrganisationPage

##### OrganisationPage (view)

###### How to get here

OrganisationListPage

* select organisation

OR MemberPage

* use organisation link

###### Spec

Navigation options:

* when user came from OrganisationListPage : "Back to organisation list" (if that list is paged, to the right page).
* when user came from MemberPage : "Back to member <displayname>"

Title: Organisation <name>

Status segment

(shown for admin only)

* Status: candidate [Activate] [Delete]
* Status: active [Delete]
* Status: deleted [Restore]

Delete: an organisation can only be deleted if there are no active or candidate members. Message: "Organisation <name> can not be deleted because is still has active or candidate members."

Delete: an organisation can only be deleted if there are no projects it is the legel owner of. Message: "Organisation <name> can not be deleted because it is still has projects it is the legal owner of."

Using these actions changes the status, and reloads the same OrganisationPage

Fields

* All fields from the edit-version below are displayed here, not editable.

Footer:

* Edit

(admin only)

leads to OrganisationPage (edit)

##### OrganisationPage (edit)

###### How to get here

OrganisationPage

* use Edit button

###### Spec

Title: Organisation <name>

All fields are displayed editable, as in the RegistrationPage , with the following changes:

* Organisation selection

not shown

Footer:

* Save, changes are saved

leads (back) to OrganisationPage

* Cancel button, changes are not saved, leads (back) to OrganisationPage

#### NewOrganisationPage

Title: New organisation

Same fields as the Organisation fields on RegistrationPage , except the organisation dropdown.

Footer:

* Save, changes are saved

leads (back) to OrganisationListPage

* Cancel button, changes are not saved, leads (back) to OrganisationListPage

# New functionality

For new functionality I wanted to try a different way of describing it. But at some point we need to merge it all into one description.

## Selectable Number of Results per Page

### Short description

An option to change the number of search results shown per page. It is now fixed at 10 results.

### Motivation

No explicit motivation was given, but it is not an unknown thing to have. Some people like to scroll, while others like to step through pages. But it mostly seems to be motivated by the screen size (mobile phone or 24inch desktop screen) and the size per result. Ideally you would not need to scroll or step pages, but the result of interest would be on the first page at the top. Giving the user the opportunity to change the default seems helpful, the user can make the decision then.

Note: it could be that users wanted, say 100 results per page so they could copy and paste that into an excel sheet. This is not needed anymore because we have the 'download result list' functionality.

### Design

The selection control will be available on all places that have page navigation (i.e. search results, and “My Projects” (See Paging 3.2.2.6.2.9.1).

It is placed near an existing paging control: Next to the pager near the result 'overview' at the top. Alternatively it could also be added to the bottom pager as well.

The selection is simpler when the options are limited. It provides the following values: 5, 10, 20, 50 and 100 (see similarity with euro banknotes).

A dropdown list seems best to use on the control:

Show [10 [V]] results per page

The control will also be shown when there is only one page, but not if there are no results.

No matter what page the user is viewing while selecting a new value, the view is reset to the first page, because that is the most clear and simplest to understand an implement. Otherwise we would have to guess which page the user wants to see (i.e. the one with also contains the first/middle/last item on the original page).

A re-query was needed already to request the new results page with a different number of results per page (limit) and an AJAX way of refreshing the page content was not needed.

The selection made is reused for every result list after the selection has been made (persistent), but after half an hour of inactivity (session timeout) the value will be reset to the default. It is not stored on the server permanently.

## Display information on associated files of a project

### Short description

Summarize the available associated files of a project; display a condensed list with the number of file for each file extension.

### Motivation

Only by inspecting the entity tree up to the sample level, you can determine what files are associated with the project and available for download. If the user has no permission yet, it could be a hint to request for it when seeing that there are associated files available.

Because we can have files from deeper entity levels, which are possibly more restricted (permission), filenames or other info that might reveal information that should stay 'non- public' are not displayed.

### Design

A textual information ‘message’ or label is being used. It is placed on the Project view page (3.2.2.8.1), at the top of the ‘general’ project information, just under the language specification.

The filename extension (part after the last dot) is assumed to indicate the type of file. Maybe better ways of determining this exist (get mime type or guessing from first bytes), but that would be more difficult implement.

Example:

Associated files: 1 unknown file, 1 PDF file, 2 TXT files

Files with no extension are counted as ‘unknown’ and uppercase is used for the file extensions to let them stand out and be different from ‘unknown’. Other options where considered less convenient, like (\*.pdf) or ‘pdf’.

For French the order of words is different:

Fichiers associés: 1 fichier inconnu, 1 fichier PDF, 2 fichiers TXT

Note that it might be a good idea to also place this on the ‘download page’ and add a similar message for the ‘original value files’ (size in Mb appended).

## Add additional Associated files

### Short description

Allow the owner of a draft project to add additional associate files to a stored project

### Motivation

After a Project has been uploaded with a TRiDaS file and all other files, the owner discovers some extra information (file) that he or she wants to add. Instead of deleting/removing the whole project and upload a changed version, it is more efficient to

### Design

The option/button/link should be near (next) to the display of already stored additional files. Selection should navigate to a page that allows uploading and adding files.

Only the owner of the project in Draft mode should be able to add files and thus change the project. Note that Draft projects are only visible to the owners or admin anyway.

### Issues

- it must be in draft mode, so needs 'unarchiving' first if it is archived. This will make more sense if we support versions, where we can add the files to a new version!

- The application supports no remove, only add, so that mighty give problems. Also there is no replace, you need to delete the whole project if you make a mistake.

The feedback should be more similar to the Upload page:  
 - there is no 'browse away warning' when you have uploaded files and are browsing away.   
 - The finish button is always enabled, even if nothing is uploaded yet.   
 - no feedback about discarding or errors

- when finish is pushed no confirm is shown, you are just redirected to the project view, we could make it similar to archiving: first go to a confirm page that contains a link to the project view!   
We now have it similar to the project upload, which has no confirm page.

## Show Link to the project or object on Map Marker Pop-up

### Short description

The Marker pop-up must have a clickable link to the referred project or object.

### Motivation

Note that it is part of a ‘bigger’ feature: showing search results on a map. Viewing the results (that have location information) on a map is a very natural way to inspect the spatial relation between results. The map displays the location using distinctive markers and when the map is displayed next to the list of results these markers have labels corresponding with the items in the result list (search hits). When a marker is clicked it shows a pop-up, with the title and the identifier. The marker pop-up is necessary for the page that displays all the results on the map without an accompanying list. Here the pop-up is the only way to know which project or object the marker is representing or referring to.

To get to the detailed information of the project or object the user could try to remember the title or identifier and then search for it without the map, but that is cumbersome.

There should be a clickable link on pop-up that brings the user directly to the detailed information.

### Design

This functionality depends on the ability to navigate to a specific project or object using a URL that contains the unique identifier within the system or archive. When the map is initialized this URL is the placed into the html ‘link’ element for each marker’s pop-up.

When searching in ‘My projects’ the results are projects and the link should go to the project. In all other cases the results are objects (part of a project) and the link should go the project view page but with the object selected and displayed.

The link is placed on the title, which is the most prominent text at the top of the popup. The identifier shown below is always the project identifier and that would be strange to click if we then go to the object instead. Although the object is part of the project so it is not completely ridicules.

Clicking the link needs to follow the same logic as when viewing a project or object from the search result list, which is checking if the user is allowed to see the result and, if necessary, redirecting to the login page first before continuing.

### Issues

The URL is different from the ‘normal’ URL for viewing a project.

## Cluster markers on the map

### Short description

Instead of separate markers for each location use cluster markers that combines several near locations into one cluster marker

### Motivation

When we have a lot of markers (>1000) the performance drops and makes the map almost unusable especially on the ‘older’ InternetExplorer browsers.

Also when a lot of markers are ‘piled’ on top of each other the user cannot really see what the ‘concentration’ of locations is.

Sometimes markers are exactly on the same location and only the one that is rendered last can be noticed and inspected. As a cluster is should show how many ‘locations’ there are.

### Design

Use the clustering options of the OpenLayers javascript library that is also rendering the map. Note that the clusters are recalculated when the zoom level changes. The clusters are now shown as circles with the cluster size (number) in the center, but this can be changed using CSS.

Clustering is also combined with so-called ‘lazy loading’ where the map is rendered on the client (browser) before the locations have been placed on it. A ‘loading’ indication is shown until the markers (and clusters) are rendered.

The cluster popups show a list of location information when the cluster size is below 10.

### Issues

The InternetExplorer browser has some problems: it works with IE10 and IE9, but IE8 is not performing well.

Popups cannot be closed after zooming.

## Show locations of user organisations on the map

### Short description

Show locations of user organisations on the map

### Motivation

This give a clear message about the European aspect of the project, although we have some in the USA and most are in The Netherlands.

### Design

The Organisations (list) page has a button at the top that navigates you to the page with the map. This page has a link back to the (list) Organisations page at the top. The main page area is covered with the interactive map showing the locations of the organistions (the ones that could be resolved).

Because we can have more organisations with exactly the same location (city center for instance) the clustering map is used.

The organisatons do not have coordinates stored in the archive, only the optional city and country. Given the city name and possibly county name we retrieve the geo location using the free web service of OpenStreatMaps. Issuing the http requests and assembling the results can take several minutes, which would not be preferable for a loading webpage. More important however is that the free web service is limited to a maximum number of requests (30.000 per day) and each time a user loads the page we get several requests; about one for each organization (approx. 60).

The organisations do not change a lot and only when a new organization is added we would really need an update.

Therefore it is not determined on each ‘page’ request but once a day (cron job) and the result is stored in a file on the server, so the web application can load the locations on each request from this file. Because the map then not always shows the latest information the timestamp of the file is shown near the map.

### Issues

Not all organisations have specified the city, so we skip those. Also some have a city but the web service is not able to find a location with it. We could ‘improve’ the city and county properties of some organisations to get them on the map.