Service Specification

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Introduction

ArtsReady Overview

ArtsReady is a service designed to help arts organizations prepare for disaster-scale crises and business interruptions. It is delivered primarily as a website built in Ruby-on-Rails and the ATHENA framework. The service is composed of three major components each with its own discreet functionality: Readiness Assessment, Knowledge Base & Battle Buddies Network. Each of these components, as well as each necessary administrative and supporting service, is detailed below.

Technical Overview

Primarily implemented in Ruby-on-Rails, ArtsReady utilizes the ATHENA web services framework for some data and business logic services. There is no absolute delineation of what will be implemented in Rails and what in ATHENA. This will be determined as-needed during the development process. Wherever possible below, we have indicated what our desires are relative to what aspects are built in Rails and what aspects are built in ATHENA. These determinations are entirely tentative and may be superseded by additional technical discovery and planning.

This Document

This document describes each component as well as all necessary administrative and supporting services. For each description, there are two sections: Overview and Technical Considerations. Additionally, in the appendix to this document, there are three other sections: Interfaces, Community Feedback and Use Cases. The sections in this document should be considered authoritative. Those found in the appendix are intended to be supporting but may include features or ideas that will not be implemented in the final service.

Sign-Up and First Use

Overview

Users fall into two general categories: administrative users and organization users. Administrative users represent South Arts employees responsible for managing the system. Organization users represent those users belonging to organizations using the service. All organization users must me affiliated with an organization.

Signing Up

Organizations that wish to sign up to use the paid ArtsReady features (Readiness Assessment, Battle Buddies, private Resource List) will first have to register for an account. User accounts are created by entering a name, email address, and password into the Sign-Up Form.

Immediately after registration, the user should be taken directly to their dashboard, which will give them further instruction on next steps. They should also receive an email confirmation of registration and payment.

Setting Up Organizations and First Users

When a user signs up with a new organization, the user enters the organization information as well as his or her personal user information. By default, this first user is always an administrative user for the organization.

Finally, the user will enter their organization's credit card information into an online form. Some organizations will be eligible for discounted or subsidized rates. Users should be able to enter a sponsor code to receive this discount, if applicable.

Once the organization is created an ArtsReady administrator must approve the organization before the user can login and access the system.

Once the organization has been approved, the organization's admin user may approve additional users signing up for the organization.

Signing up Additional Users

Subsequent organizational users sign up and choose the organization they are affiliated with at sign-up. Before these users can use the system, the organizational admin (or an ArtsReady admin) must approve their affiliation.

By default, new users may only view information in the system. This is the default "viewer" role. When a user's affiliation is approved (and at any point thereafter), an organization's admin user may set the user's role to "editor", "executive" or "admin".

"Editor" users may access all features of the system except library documents tagged "executive" or user access control. "Executive" users may access "executive" documents. "Admin" users may access user access controls and "executive" documents.

At any time an organization admin user or an ArtsReady admin user may disable or reset the password of a user's account. All users should be able to reset their own passwords.

Technical Considerations

Billing Information
Billing information will be stored in Braintree, our payment processing service and should not be stored in the application.

ATHENA v. Rails
As ATHENA only authenticates applications, we expect all of the user/organization/role logic will be implemented in Rails.

However, we expect organization information (and possibly user information) to be stored in ATHENA People records. We also expect communication with users to use the ATHENA Notifications component.

Login and Dashboard

Overview

All users are taken directly to their Dashboard after login. The Dashboard includes some information related to each of the ArtsReady components:

- For users that haven't started the Readiness Assessment process, instructions and a link to get started
- Urgent Action Items (upcoming due dates, overdue, etc.)
- Progress for the Readiness Assessment and the organization's To Do's
- Battle Buddy Network updates (messages from or notifications of Battle Buddies in crisis)
- Featured Library articles

The Dashboard is not configurable.

If an organization is **In Distress**, the user should be taken straight to their **Crisis Console** instead of the Dashboard on login.

Technical Considerations

The Dashboard is a largely static page with data from every other aspect of the system. Technically, we expect it to be pretty straight-forward.

Readiness Assessment

Overview

The Readiness Assessment is designed to help organizations determine their current level of preparedness for a crisis and identify any actions they may need to take to become more prepared.

The Readiness Assessment component is comprised of two closely related parts:

1. The **Readiness Assessment** itself is a series of questions related to critical business functions ("Critical Functions") that an organization answers. Answering a question consists of indicating both a level of preparedness and a priority. Alternately, questions can be marked "irrelevant" and not answered.
2. The **To Do List** is effectively a task manager aimed at helping organizations complete the necessary steps to become more prepared for a crisis. Action Items are associated with questions in the Readiness Assessment and automatically added to an organization's To Do List as the user moves through the assessment process.

All Readiness Assessment questions are created and edited by ArtsReady admins in a separate admin interface. ArtsReady admins also create Action Item templates and associate them with questions in the Assessment.

Assessment => To Do List

The purpose of the **Assessment** is to produce **Action Items** on the **To Do List**. Accordingly, each question in the assessment is associated with one or more action items which it generates. A user will provide three answers for a question:

1. Is it relevant
    o   Answers: Yes or No. If "No", the following questions are skipped.
2. How important is the Question's subject matter to the organization (or Priority).
    o   Answers: Critical, Not-Critical
3. How well-prepared for the Question's situation is the organization (or Preparedness).
    o   Answers: Ready, Not Ready, Needs Work, Unknown

When a question is answered as "**relevant**", the **Action Items** associated with it are added to the organization's **To Do List**. **Action Items** generated from the questionnaire are assigned the Priority chosen in question 2.

Action items may be affiliated with more than one question. In this case, if either, both or some questions are answered anything but **"irrelevant"** the **Action Item** is created. The highest selected priority is assigned.

Questions are organized by **Critical Function**. This assignment is set by the ArtsReady administrator when the questions are created. Users may render an entire section of the questionnaire (i.e. an entire Critical Function) irrelevant at once. This accommodates situations where a critical function is irrelevant to an organization (e.g. "collections" for a theatre company).

When questions are rendered **"irrelevant"**, they are not removed, but instead shaded out to indicate their status. This provides the opportunity for users to change their minds and re-activate questions.

Throughout the process, a meter displays the organization's progress through the questionnaire.

To Do List => Action Items

At any point after answering a single question, a user may review the organization's **To Do List**. All of the open **Action Items** are listed here.

From the **To Do List**, users are able to:

1. Change the priority of an **Action Item**.
2. Assign an **Action Item** to another user in their organization.
3. Set a due date on an **Action Item**.
4. Create new **Action Items**.
5. Open an **Action Item**.
6. Sort and filter **Action Items** based on priority, assignment, completeness, due date or critical function.

When completed, Action Items are shaded out (possibly with different styles) and moved but not removed.

All progress on the **To Do List** is tracked in a meter similar to the one for the questionnaire.

Action Items

The individual **Action Item** screen includes:

1. A description of the task.
2. A list of actions users have taken to resolve the task (with dates and times).
3. Links to internal or external resources affiliated with the resolution of the task.

From the **Action Item** screen, users are able to:

1. Change the priority of an **Action Item**.
2. Assign an **Action Item** to another user in their organization.
3. Set a due date on an **Action Item**.
4. Set a review date on an **Action Item** for **Action Items** that must be reviewed on a regular basis (annually, etc.).

5. Leave a note related to the resolution of the **Action Item**.
6. Create a resource on the organization's private **Resource Directory** "Our Critical Stuff".
7. Link to an existing item in "Our Critical Stuff" or the ArtsReady **Library**.
8. Set an **Action Item** as **"complete"**.

Technical Considerations

We expect Action Items will be stored in ATHENA. We hope to create an ATHENA component called ATHENA Workflow, which provides workflow-based changes to objects in an ATHENA data store.

Questions should be stored in Rails or ATHENA as appropriate.

We expect everything else will be implemented in Rails.

Knowledge Base

Overview

The Knowledge Base is where users store the information they need to prepare for emergencies. Some of this information is public (such as how-tos or guides) and some is private (such as a directory tree for one organization). The service's users upload and edit this content and in that way, the Knowledge Base is simply a special-purpose CMS.

Three Types of Record

The Knowledge Base stores three types of Records: Articles, Files and Links. Articles are Records composed in the ArtsReady service. These are entered as structured text (HTML or Textile). Files are documents prepared off-line and uploaded to the service, such as images or PDFs. Links are hyperlinks to other services.

Three Views

Articles in the Knowledge Base are displayed in three ways: as Articles, in an Index or in a Resource List.

In the Article View, the content of the Article itself is displayed. For Files, the file is downloaded. For Links, the URL is followed.

In an Index, Records are listed as categorized search results. Search results will include the record title and a brief summary.

In the Resource List, select records are listed in a table format. Each organization has a single resource list: Our Critical Stuff. When a record is created, it may be assigned to the "Our Critical Stuff" resource list by the user. Record titles, a brief summary and some metadata are displayed in Resource Lists.

Access Control

When Records are created, they are automatically assigned an owner: the organization to which the creating user belongs. Once created, Records may only be edited by users belonging to that organization or ArtsReady administrator users.

When Records are created, the user will indicate whether a record is "public", "private" or "executive". Public articles may be viewed by any user of ArtsReady, including public users without an account. Private records may only be viewed by users in the organization which created them. Executive records may only be viewed by users in the organization with admin or executive user privileges.

Private records may be further indicated as "battle buddies allowed" or "specific battle buddies allowed". These articles will be viewable to users in organizations in the owner's battle buddies network. If "specific battle buddies allowed" is selected, specific battle buddies must be chosen.

ArtsReady admin users may view and edit any record.

By default, all Articles and Links are set to permission "public" and all Files are set to permission "private". By default all records assigned to Our Critical Stuff are set to permission "private".

Versioning

If supported by the underlying ATHENA service, all Knowledge Base records will support simple versioning. Users will be able to view (but not edit) past versions of Records. There will be no intrinsic Rollback or Merge functionality. If Users delete versioned records, all of the versions will be deleted as well.

Comments

Knowledge Base records will support comments in a style similar to the system used by Basecamp writeboards. Only users with permission to see the Records will be able to see or post comments. Comment creators or ArtsReady administrators may delete comments.

For Public Records, only users with accounts will be able to see comments. <u>Public anonymous users will not be able to see comments under any circumstances.</u>

Technical Considerations

We are developing an ATHENA component called ATHENA Docs specifically to store knowledge base records. The various views and the permission system will be implemented in Rails.

Battle Buddies

Overview

Battle Buddies is a purpose-specific social network that allows organizations to identify peers who they can connect with in the event of a crisis it offer or request assistance. It also provides a mechanism to request or offer aid and to keep a log of actions taken during a crisis.

Create a Battle Buddies Profile

Before connecting with Battle Buddies, an organization must create a Battle Buddies profile. This profile includes the organization's contact information (imported in part from their organization profile) and a list of potentially available resources the organization can offer others in the event of a crisis.

Connect With Battle Buddies

Users find Battle Buddies for their organization to connect with in the **Battle Buddy Locator** interface. This interface is based on a Google Map. Searches begin geographically, with all Battle Buddies listed within a user-selected range from the address of their organization (this defaults to 20 miles).

Each potential Battle Buddy appearing on the map also appears in a list, with their potentially available resources listed. For each entry in this list, there is a button which if pressed triggers a request to connect as a Battle Buddy.

Battle Buddy **relationship requests** that must be approved by an "editor", "executive" or "admin" user in the organization receiving the request before the organizations can connect in a crisis.

Viewing Battle Buddy Status

In a separate **Battle Buddy Status** interface, users may view the status of their Battle Buddies and recent network updates their Battle Buddies have sent.

From this interface users may also leave a <u>non-crisis network update</u> which may be viewed by their Battle Buddies. A user may choose to send a non-crisis network update to all Battle Buddies or only select Battle Buddies.

Rendering Aid

From the Battle Buddy Status interface, a user may render aid to an organization **in-crisis**. The user may respond to the Battle Buddy's request for help by commenting on their **crisis log**.

Asking For Help

From a separate **Crisis Console** interface, a user may declare his or her organization to be **"in distress"**. This triggers the creation of a crisis log for this crisis for this organization.

When going "in distress" users may elect to reveal their status to all or only select Battle Buddies. This declaration may be changed at any time. If Battle Buddies are added to the crisis, they will be able to view the entire Crisis Log.

Once "in distress", organizations may identify crisis-specific resource needs. These will appear in their status to Battle Buddies notified of their crisis. As these resource needs are met, the organization "in distress" will remove them from their needs list.

At any point an organization "in distress" may choose to "resolve" their crisis. At this point, the crisis log is archived. An organization may access archived crisis logs at any time.

Technical Considerations

Battle Buddies will be technically very sophisticated and will require careful discussion between the Rails and ATHENA developers. We expect that Battle Buddies will use ATHENA People for storing organization records and ATHENA Notifications for communicating with users. Beyond that, we expect most of the component to be implemented in Rails.

Administration

Overview

ArtsReady Admins need to be able to administer organizations, user accounts and roles. They should be able to view, create, edit, and delete all ArtsReady users and organizations. They should also be able to edit users' roles within organizations.

Admins should be notified of any organizations whose accounts are about to expire.

Additionally, ArtsReady Admins should have access to all information in the system (except for users' passwords), including private resources created by organizations and all activity in the Battle Buddy Network log (regardless of the privacy of the crisis).

ArtsReady Admins should be able to create basic reports of membership and member use of specific features (e.g. Battle Buddies, Readiness Assessment) and export this information.

ArtsReady admins should be should be notified when new public content is added to the Library and should be able to moderate both content and comments in the Library.

Technical Considerations

As ATHENA does not support user-level access control, we expect the administrative aspects of the application to be primarily implemented in Rails.

Public Versions

Overview

While much of the ArtsReady service is available only to paid subscribers, any visitor to the site will be able to view public Library content. This exists to serve the arts community and encourage organizations to sign up for the service.

Library comments are never visible to public users.

There are also several static pages of marketing material, which describe ArtsReady features and pricing in greater detail.

ArtsReady admins should be able to create, edit, and delete static pages on the public version of the ArtsReady website.

Technical Considerations

Our hope is that the semi-static pages required for the public sections of the site can be implemented using the same underlying technologies as the rest of the service: ATHENA Docs as the data layer and Ruby-on-Rails for the views. We are amenable to using a third-party Open Source CMS if this is faster and cheaper (such as Radiant).

Mobile Interface

TBD: This feature will only be implemented if time and resources permit.

Overview

The mobile interface for ArtsReady allows users to access several elements of the ArtsReady service from a mobile device.

Library
The mobile service will provide general access to both the public and premium content in the ArtsReady **Library** (the mobile service will authenticate premium users). The focus of this interface will not be on general browsing, but on finding and accessing specific content.

Our Critical Stuff
The mobile service will provide separate access to an organization's **Our Critical Stuff**.

Battle Buddies
The mobile service will provide organizations to use all aspects of the **Crisis Console** interface of the **Battle Buddies** feature. This will include setting the organization's **status**, adding or editing specific **resource n**eeds and leaving reports in the **log**.

Technical Considerations

At this time, the mobile design is generic and not strongly tied to any given mobile architecture.