Module 3: What is PSS?

Required Reading	**For Module 3.1** - Award-Wining Performance & Consulting by Gary Dickelman: [**award_winning_performance.pdf**] - TurboTAX: https://turbotaxweb.intuit.com/open/registration/CreateMember.htm - Sales Force: http://www.salesforce.com/ **For Module 3.2** - Chapter 11 in the "designing from both sides of the screen" textbook - Turbo demo: http://www.turbodemo.com/eng/index.htm - Knowledge Extension: http://www.knowledgextensions.com/demo.htm - 2Work! EPSS: http://www.thinksmartps.com/product.html
Audio Files	**- Mod3-audio.mp3**
Assignment Due Dates	- Complete Module 3.1- Activity 1.1 by **Tue, Feb 19th at noon** - Complete Module 3.1- Activity 1.2 by **Turs, Feb 21st at noon** - Complete Module 3.1- Activity 1.3 by **Mon, Feb 25th at noon** - Complete Module 3.1- Activity 1.4 by **Wed, Feb 27th at noon** - Complete Module 3.2- Activity 2.1 by **Turs, Feb 28th at noon** - Complete Module 3.2- Activity 2.2 by **Mon, March 3rd at noon** - Complete Module 3.2- Activity 2.3 by **Wed, March 5th at noon** - Complete Module 3.2- Activity 2.4 by **Sat, March 8th at noon**

I. Introduction

In module 1, we read papers about PSS, learned about real examples of interactive software and related principles for designing them. Module 2 introduced conceptual frameworks of human interaction, primary components/features of PSS, and commonalities and differences between some design approaches.

In this module, we will get a real taste of PSS by exploring examples of PSS. To do this, each of you is assigned to a team of 3-4 members. You will work with your team members to accomplish all the activities in this module. **Only the**

reflection statement at the end of the module is meant to be an individual work effort, all other work products are team products. Since some class members are distant from Columbia I would like us all to work as if we are distance students. Unless for some reason you can't avoid it try not to meet other members f2f even if most of you are on campus students; instead, you are encouraged to discuss your tasks with others via Sakai or other synchronous or asynchronous communication systems, such as Qwaq. I will create a db thread and a wiki page for each team to use for discussion of the work of the module and for coming to consensus on team products as well as for some review by partners in later activities of mod 3.

There will be two phases (Module 3.1 & Module 3.2) in this module. We will have different learning objectives, activities, and tasks for each phase. There are no right or wrong answers for any task; to explore and get to understand EPSS implementations is the overall goal for this module.

Please find your team members from the table of teams listed below. Please also make sure your profiles on the discussion board are up to date with current contact info (and a picture) so teammates can connect easily.

Team 1	Team 2	Team 3
Boedenauer, Catherine Huang, Yanyan Schodowski, Patricia Van Tassel, Jane	Durboraw, John Necibi, Semi Vo, Ngoc	Clauser, Terry Goeders, Michelle James, Josiah Hicks, Stephanie
Team 4	Team 5	
Howey, Tracy Vanithbuncha, Piyanun Martin, Kelley	Marmolejo, Gina Howard, Genevieve Sample, Angela	Nieuwenhuizen, Lisa Appleton, Lucy Pepin, Colleen Rockwell, Britne

II. Module 3.1 (Phase 1: Feb 17th – Feb 27th)

Introduction: What is EPSS?

In the ground-breaking book Electronic Performance Support Systems published in 1991, Gloria Gery defined EPSS as:

"an integrated electronic environment that is available to and easily accessible by each employee and is structured to provide immediate, individualized on-line access to the full range of information, software, guidance, advice and assistance, data, images, tools, and assessment and monitoring systems to permit job performance with minimal support and intervention by others."

EPSS has a broad definition, which is part online help, part online tutorial, part database, part application program, and part expert system. It can come in many forms including wizards, cue cards, and coaches. EPSS emerged from the field of human performance technology (HPT), and aims to improve workplace performance. Performance issues have three components: skills and knowledge, resources, and motivation. Effective EPSSs do more than simply provide information. Gloria Gery also defines four primary components of an integrated learning and performance support environments: performance support tools, references, instruction, and collaboration. This can help us to think about EPSS from a broader perspective

We will explore and evaluate PSS in actual use by examining real systems analytically to see what they do and how they do it. And find out what makes for a superior PSS.

Here are the activities for Module 3.1:

1. Activity 1.1

Before starting the examination of systems please read yet one more article to help shape your perspective of PSS linked here: Go to Resources/ Module 3 folder and read the artilce: "Award-Wining Performance & Consulting" by Gary Dickelman: [**award_winning_performance.pdf**].

This article should help us start thinking about what makes for a superior EPSS. In this activity, we will examine 2 PSS: **TurboTAX** and **Sales Force**. See the table below to find out which system you are going to explore.

PSS	Team Assigned
1. TurboTAX https://turbotaxweb.intuit.com/open/registration/CreateMember.htm	Team 1 Team 2 Team 3
2. Sales Force http://www.salesforce.com/	Team 4 Team 5 Team 6

For TEAMs 1,2 &3 you need to go to the URL of TurboTAX and create your own user ID and password, and then login at:

https://turbotaxweb.intuit.com/open/registration/SignIn.htm

For TEAMs 4,5 & 6 you need to go to the URL: http://www.salesforce.com/

Click on Free Trial, register, and they will email you your temporary password, and other information. One member of the team can register for a team trial account and then add the others.

All the TEAMs should get their user names and password by **Tuesday. noon (Feb. 19th)**. Let us know if you have any problem.

Review Directions:

For TurboTax: You can go through the software as a user completing your income taxes. If you don't have much familiarity with paying taxes just try the basic system; if you have more experience try the deluxe. It's up to your team how you will examine the system. You can use a fake name if you like, but the more authentically you try to actually complete your taxes in this system the more you will learn from it. When you get to the end of the process you do not need to submit your taxes so feel free to try it out.

For Sales Force: You can get a team account, add users, or you can get individual accounts. It's up to your team how you will examine the system. Explore the system, find out what/how it supports what you want to do, and at least try to create a new event, task, account, and report. To fully appreciate this PSS you should try to role play and make the use of CRM (customer relationship management) a part of your work.

2. Activity 1.2

Each team will create a diagram, concept map, or flow chart (some form of visual representation) to present the system you reviewed, Turbo TAX or Sales Force. Your product can be an HTML or PDF file. **Each team can create a subfolder under [Module 3/ Activity 1.2&1.3 Submission] folder in Resources with the name of Mod 3.1 + Team number (team 1, 2, 3, 4, 5 & 6)**, and upload your diagram file. Post your team diagram in Resources by **Thursday (Feb 21st)**.

3. Activity 1.3

Write a team report on the PSS you reviewed and answer following questions:

- What are the goals of the PSS (turbotax or sales force)?
- Who are the target audience/groups of the PSS?
- What features of the system do you think are good, and why?
- What improvement do you recommend for the system to support performance better?
- What do you think PSS is after exploring Turbo TAX/ Sales Force? Give a definition of PSS based on your understanding and in your own words.
- Develop a short demonstration of some aspect of the system using no more than 3 to 4 screenshots that illustrate a key way that performance is supported. The purpose of the demo is to teach your classmates who may not be viewing this system something about how the system implements performance support. Make sure you provide an explanation of how the feature works and why you chose it.

Your report can be HTML or PDF files. **Post your team report to your team folder under [Module 3/Activity 1.2&1.3 Submission] folder in the Resources.** This should be done by **Monday (Feb. 25th)**.

4. Activity 1.4

Review the diagram and team report of your partner team and give them feedback/comments. **Team 1 and team 4 (2&5, 3&6)** will review each other's work and work as partners for the activity 1.4. To do this, you need to get

familiar with the system you haven't reviewed. You can explore the system; you may need to pay attention to the screenshots your partner team provides; you can discuss with them and find out their key points. **Your feedback/comments should include at least two aspects of their report that are well established and good insights and two points that are comparably weak and could be improved. This is also team work.** Post your feedback to the Discussion Board thread: "**Activity 1.4: Feedback/Comments for Partner Team**" for your partner team by **Wednesday (Feb. 27th)**.

III. Module 3.2 (Phase 2: Feb 27th – March 8th)

After some hands on review of two real systems, we will examine some other systems by watching demos.

Demos	Team Assigned
1. Turbo demo http://www.turbodemo.com/eng/index.htm click on Free Trial, register, and download **TurboDemo Trial 7.0**	Team 1 Team 2
2. Knowledge Extension http://www.knowledgextensions.com/demo.htm Click on Try out our 3 demos	Team 3 Team 4
3. *2Work!* EPSS http://www.thinksmartps.com/product.html click on "**Demo**" on the top of the page.	Team 5 Team 6

1. **Activity 2.1**

   Each team should access their demo by **Thursday (Feb 28th)**. If you have any problem, please seek help among your peers or let us know. The demos are fairly short so I encourage everyone to review all 3 demos, but you only need to write a report about your teams' assigned application.

2. **Activity 2.2**

   Write a team report on the PSS you reviewed and answer the following questions:

- What are the goals of the PSS (turbotax or sales force)?
- What are the goals of the PSS?
- Who are the target audience/groups of the PSS?
- What features of the system do you think are good, and why?
- What improvement do you think is necessary for the system to support performance better?
- What do you think PSS is after exploring the system? Give the definition of PSS in your own words.
- In what important ways is the system you demoed similar to the system you examined in phase 1 and in what ways is it different?

Your report can be an HTML or PDF file. Each team can create a subfolder under Module 3 folder under **[Resources/Activity 2.2 Submission]** with the name of Mod 3.2 Report + team number (team 1, 2, etc.), and upload your file. This should be done by **Monday (March 3rd)**.

3. Activity 2.3

Review team report of 2 other teams and give them feedback/comments:

Team 1 review Teams 2 & 3

Team 2 review Teams 1 & 3

Team 3 review Teams 1 & 2

Team 4 review Teams 5 & 6

Team 5 review Teams 4 & 6

Team 6 review Teams 4 & 5

Your feedback/comments should include at least two aspects of their report that are well established and good insights and two points that are comparably weak and could be improved. This is also **team work**; each team needs to provide the review as a team. Post your feedback to the Discussion Board thread: "**Activity 2.3: Feedback/Comments for Partner Teams**" for your partner team by **Wednesday noon (March 5th)**.

4. Activity 2.4

Read Chapter 11 from the "designing from both sides of the screen" book. Chapter 11 reviews and summarizes two key aspects of design: (1) understanding the tasks, and (2) doing usability testing. For the application that your team reviewed in phase 1 *how well do you think the design team understood the task and how would you imagine doing usability testing for the application.* **Identify one indicator of understanding or misunderstanding the task that you found in the system. Also briefly describe any key conditions you would want to include in the usability testing.** For example a key condition is to make sure that your testers actually do their taxes (for the turbotax example). Post this as a team work product to the mod 3 Discussion Board forum: "Activity 2.4 Indicator & Key Conditions" by **Saturday. noon (March 8th)**.

III. Reflection

When you have completed all of the work of module 3 answer the following questions and submit your answers via the **Assignments** tool (**Module 3 Reflection**). You may type or paste your answers in the textbox and submit it by **Saturday noon (March 8th)**.

I am interested in trying to understand how students participate and contribute in a social learning setting and also in helping you reflect on how your actions add to or detract from your own learning and that of others.....so after each module I will ask you to respond to this same set of questions about your participation. I will not use your self rating to influence how I assign points for a module, but I do require completion of these reflection statements as part of your module work effort.

Please rate yourself (1 to 7 with 7 being excellent and 1 being poor) and then rate your classmates by saying if you feel you are above or below the class average along these dimensions of social learning for this module. For example: Participation "5 above". Also if you have some insight about how or why it worked out for you that way I would love to hear it. I'd also appreciate any thoughts you have about the extent to which these ratings are hard for you to make.

1. **Rate your Participation:** All students are engaged in that they read and produce what is necessary to complete the assignment, whereas participation means taking on the role of a speaker or knowledge producer within the class, not just accepting what is presented but trying to make it your own.

2. **Rate your Contribution:** Does the student contribute to the class discourse and project work in ways that build meaning and lead to mutual understanding. Not only building new knowledge for yourself as in Participation, but contributing to the knowledge development of the class or group within the class.

3. **Rate your Identity:** Does the student take a responsible role in the community such that he/she answers questions posed by others, identifies ways to improve practice, and/or assumes leadership when tasks/issues/problems arise? Does the student take on a role of self regulation and self control for their own learning (internal form of monitoring and regulation)?

    Your answers do not need to be long, just thoughtful.

VIII. Assessment

Your Module 3 assignments will be graded based on the following criteria:

Assignments	Points
Module 3.1- Act 1.2: A diagram, concept map, or flow chart to present reviewed system.	2
Module 3.1- Act 1.3: Team report for revised PSS	3
Module 3.1- Act 1.4: Feedback for the partner team	1
Module 3.2- Act 2.2: Team report for revised PSS	3
Module 3.2- Act 2.3: Feedback for the other two partner teams	2
Module 3.2- Act 2.4: Indicator of understand or misunderstanding & conditions included in the usability testing.	3
Reflection (submit via Assignments tool)	1
Total Points	**15**

**Note. Points given will base on the quality of work.