Overview

Currently, a Portfolio site's coordinator must manually add students, from an associated Course site, to a Portfolio site's roster in order for the students to work with the Portfolio site's matrix. This is a labor intensive process that requires the coordinator to have access to the associated course site's roster, which won't often be the case.

To solve this problem, we will automate the roster update process. The requirements for automating the roster update process are as follows:

- Once a course site has been associated with a portfolio site and the coordinator has chosen to use the automated roster update process, the system must add the students, who are members of the associated course site, to the portfolio site's roster.
- Ensure that students who have been added to a portfolio site remain in the portfolio site for the remainder of their stay at the university.
Note: With the provider approach, students would be dropped from the portfolio site if they were dropped from the course site. According to Lynn, this is ok as long as the coordinator can manually add the student to the portfolio site once he has been dropped from the course site.
    * Ensure that a student's data remains available to the coordinator even if the student is dropped from the associated course
      site and thus the portfolio site.
    * Provide the ability for the coordinator to report on a dropped student's data
- Provide the ability for the program coordinator to manually remove students from the portfolio site
Note: With the provider approach, the program coordinator would not be able to remove provided students from the portfolio site, unless the coordinator first changes the role of the provided student, which adds the student to the Portfolio site's roster. The coordinator may then remove the student. This student, even though still in the course site's roster, will not be provided to the Portfolio site.
- Manual additions and/or role changes to the portfolio site roster take precedence over automated changes:

Use Case #1: If a coordinator manually changes the role of a provided user, that role remains in effect regardless of the user's role in an associated course site. In other words, a student is added to the portfolio site by the provider and the coordinator promotes the student from participant to reviewer, the new role sticks unless the coordinator changes it manually.

Use Case #2: If a coordinator adds a new user to the portfolio site in a role other than participant and later that same user enrolls in an associated course site, the user's original role sticks unless the coordinator changes it manually.

- Provide the ability for the coordinator to disable roster automation for specific sites or for the entire program
- Create a group for each course site that is associated with the portfolio site and automatically add the students from that course site to the group.
- Ensure that the data we obtain from course sites (e.g., assignments) is still available from the portfolio site once a course site is archived.
- Ensure that the site coordinator can continue to access the matrices of students in archived sites.
- Provide the ability to report only on students who are in the program (may be some students in a course site who are not in the program that the portfolio site is for)
- Parent sites will inherit a child site's associations.

Manage Site Associations (None)

⬉ Matrices   ⍰

Manage Site Associations

   No sites are currently associated.

[Associate Sites](#)

<div style="border:1px solid #999; display:inline-block; padding:4px 8px;">Return to Manage Matrices</div>

Notes for Manage Site Associations (None)

Notes

- The user accessed this screen by clicking Manage Site Associations from the Manage Matrices screen.
- If the user clicks Associate Sites, the system will display the Associate Sites screen.
- If the user clicks Return to Manage Matrices, the system will display the Manage Matrices screen.

Associate Sites

Matrices

Associate Sites

To associate a site, locate the site in the list below or search for the site by entering the Title or Site ID in the text box. Then select the checkbox next to the Title of the desired site and click 'Associate Sites'. You may select multiple sites at a time to associate.

Sites Available for Association

Search Available Sites: (Enter Title or Site ID) [Search] [Clear]

Viewing 1 to 5 of 5 sites

| < | < | Show 20 ▼ | > | >| |

	Title ≡	Site ID	Status
☐	▶ FA08 IN BUS P301 1415	FA08-IN-BUS-P301-1415	Not Associated
☐	▶ FA08 IN BUS P301 1416	FA08-IN-BUS-P301-1416	Not Associated
☐	FA08 IN BUS P301 1417	FA08-IN-BUS-P301-1417	Not Associated
☑	FA08 IN BUS P301 1418	FA08-IN-BUS-P301-1418	Associated
☐	FA08 IN BUS P301 1419	FA08-IN-BUS-P301-1419	Not Associated

[Associate Sites] [Cancel]

Notes for Associate Sites

Notes

Search
- If the user clicks in the Search Available Sites text box, the system will clear the "(Enter Title or Site ID)" text from the text box.
- If the user enters a search term and clicks Search, the system will search the list of sites available for association and then display the list of sites that match the term entered by the user.
- If no sites match the term entered by the user, then the system will display the following message using the "alertMessage" class: "No sites were found that match your search term. Please enter a new search term and try your search again."
- The system will search only the Title and Site ID fields for the term provided by the user.
- If the user clicks Clear, the system will clear the search term and display the entire list of sites available for association to the user.

Sites Available for Association
- By default, the system will display the first 20 sites that the current user is a member of.
- If the user selects the topmost checkbox, the system will select the checkboxes for all sites on the current page.
- By default, the system will sort the list of sites available for association by Title in ascending order.
- List is sortable by Title and Site ID.
- In the checkbox column, the system will display an enabled, unselected checkbox if the site is not yet associated with the current site. The system will display a disabled, selected checkbox, if the site is already associated with the current site.
- In the Title column, the system will display the title of the site.
- In the Site ID column, the system will display the identification number of the site.
- In the Status column, the system will display the association status of the site.
- The system will save the user's selections upon advancing to a new page.

Associate Sites
- If the user selects at least one site and clicks Associate Sites, the system will display the Associate Sites Confirmation screen.
- If the user clicks Associate Sites and has not selected at least one site, the system will display the message: "You must select at least one site."

Cancel
- If the user clicks Cancel, the system will cancel the Associate Sites transaction and return the user to the Manage Site Associations screen.

Associate Sites Confirmation

🔧 Matrices   ❓

Associate Sites Confirmation

By default, the users in the associated sites will be added to the current site through a process called roster synchronization. To turn off roster synchronization for a site in the list below, deselect the checkbox next to the corresponding site. Then, confirm the association of all sites in the list by clicking 'Save'.

Title	Site ID	Sync Rosters?
FA08 IN BUS P301 1415	FA08-IN-BUS-P301-1415	☑
FA08 IN BUS P301 1416	FA08-IN-BUS-P301-1416	☑

Save   Cancel

Notes for Associate Sites Confirmation

Notes

- The system will display the list of sites that the user selected on the Associate Sites screen and will select the Sync Rosters checkbox for all sites by default.
- If the user clicks Save, the system will save any changes made to the Sync Rosters checkbox, associate the sites, return the user to the Manage Site Associations screen and display the following success message: Site associations added.
- If the user clicks Cancel, the system will cancel the Associate Sites Confirmation transaction and return the user to the Associate Sites screen.

Manage Site Associations (Add Success)

⇄ Matrices   ❓

Manage Site Associations

- To associate more sites, click 'Associate Additional Sites'.
- To toggle roster synchronization, select the checkbox next to the corresponding site and then click 'Roster Sync On' or 'Roster Sync Off'.
- To remove a site's association, select the checkbox next to the corresponding site and then click 'Remove Association'.

☑ Site associations added.

Associated Sites

Search Associated Sites [(Enter Site Title or ID)] [Search] [Clear]

Viewing 1 to 3 of 3 sites

[|<] [<] [Show 20 ▼] [>] [>|]

[Associate Additional Sites](#)   Remove Association | Roster Sync On | Roster Sync Off

Title	Site ID	Roster Sync	☐
FA08 IN BUS P301 1415	FA08-IN-BUS-P301-1415	On	☐
FA08 IN BUS P301 1416	FA08-IN-BUS-P301-1416	On	☐
FA08 IN BUS P301 1418	FA08-IN-BUS-P301-1418	On	☐

[Return to Manage Matrices]

Notes for Manage Site Associations (Add Success)

Notes

- The instructor accessed this screen by selecting Save from the Associate Sites Confirmation screen.
- The system will remove the success message upon the next user action.

Manage Site Associations

Matrices

Manage Site Associations

- To associate more sites, click 'Associate Additional Sites'.
- To toggle roster synchronization, select the checkbox next to the corresponding site and then click 'Roster Sync On' or 'Roster Sync Off'.
- To remove a site's association, select the checkbox next to the corresponding site and then click 'Remove Association'.

Associated Sites

Search Associated Sites: (Enter Title or Site ID)   Search   Clear

Viewing 1 to 3 of 3 sites

|< | < | Show 20 ▼ | > | >|

Associate Additional Sites   Remove Association | Roster Sync On | Roster Sync Off

Title	Site ID	Roster Sync	☐
FA08 IN BUS P301 1415	FA08-IN-BUS-P301-1415	On	☐
FA08 IN BUS P301 1416	FA08-IN-BUS-P301-1416	On	☐
FA08 IN BUS P301 1418	FA08-IN-BUS-P301-1418	On	☐

Return to Manage Matrices

Notes for Manage Site Associations

Notes

Search
- If the user enters a search term and clicks Search, the system will search the list of associated sites and display the list of sites that match the term entered by the user.
- If no sites match the term entered by the user, then the system will display the message: "No sites were found that match your search term. Please enter a new search term and try your search again."
- The system will search only the Title and Site ID fields for the term provided by the user.
- If the user clicks Clear, the system will clear the search term and display the entire list of sites available for association to the user.

Associate Sites
- If the user clicks Associate Additional Sites, the system will display the Associate Sites screen.

Sites Available for Association
- By default, the system will display the first 20 sites that are associated with the current site.
- If the user selects the topmost checkbox, the system will select the checkboxes for all sites on the current page.
- If the user selects at least one checkbox, then the system will enable the Remove Association, Roster Sync On, and Roster Sync Off links.
- By default, the system will sort the list of associated sites by Title in ascending order.
- List is sortable by Title and Site ID.
- User's selections will not be saved upon moving to a new page.

Return to Manage Matrices
- If the user clicks Return to Manage Matrices, the system will return the user to the Manage Matrices screen.

Remove Site Associations Confirmation

🔧 Matrices   ❓

Manage Site Associations

- To associate more sites, click 'Associate Additional Sites'.
- To toggle roster synchronization, select the checkbox next to the corresponding site and then click 'Roster Sync On' or 'Roster Sync Off'.
- To remove a site's association, select the checkbox next to the corresponding site and then click 'Remove Association'.

Associated Sites

Search Associated Sites:

⚠ All content related to the following associated site(s) will be removed. Are you sure you want to remove the following associated site(s)?		
Title	**Site ID**	**Roster Sync**
FA08 IN BUS P301 1415	FA08-IN-BUS-P301-1415	On

[Remove]   [Cancel]

Showing 1 to 3 of 3 sites

Show 20 ▼ [>] [>|]

[Associate Additional Sites](#)   Roster Sync On | Roster Sync Off

Title			☐
FA08 IN BUS P301 1415			☐
FA08 IN BUS P301 1416	FA08-IN-BUS-P301-1416	On	☐
FA08 IN BUS P301 1418	FA08-IN-BUS-P301-1418	On	☐

[Return to Manage Matrices]

Notes for Remove Site Associations Confirmation

Notes

- The site coordinator accessed this screen by selecting the checkbox next to at least one site and then clicking Remove Association.
- If the instructor clicks Remove, the system will remove the association between the selected site(s) and the current site, including any associated content and the roster synchronization. The system will then return the instructor to the Manage Site Associations screen and will display the following success message: "Site associations removed."
- If the instructor clicks Cancel, the system will cancel the Remove Site Associations transaction and return the coordinator to the Manage Site Associations screen.

Manage Site Associations (Removal Success)

⇄ Matrices

Manage Site Associations

- To associate more sites, click 'Associate Additional Sites'.
- To toggle roster synchronization, select the checkbox next to the corresponding site and then click 'Roster Sync On' or 'Roster Sync Off'.
- To remove a site's association, select the checkbox next to the corresponding site and then click 'Remove Association'.

☑ Site associations removed.

Associated Sites

Search Associated Sites [(Enter Site Title or ID)] [Search] [Clear]

Viewing 1 to 3 of 3 sites

[|<] [<] [Show 20 ▼] [>] [>|]

[Associate Additional Sites]   Remove Association | Roster Sync On | Roster Sync Off

Title	Site ID	Roster Sync	☐
FA08 IN BUS P301 1416	FA08-IN-BUS-P301-1416	On	☐
FA08 IN BUS P301 1418	FA08-IN-BUS-P301-1418	On	☐

[Return to Manage Matrices]

Notes for Manage Site Associations (Removal Success)

Notes

- The instructor accessed this screen by selecting Remove from the Remove Site Associations Confirmation screen.
- The system will remove the success message upon the next user action.

Specification for Roster Synchronization

Notes

Adding Students to a Parent Site's Roster
- A provider will be used to provide students from associated course sites, participants from associated portfolio sites and students and members from associated project sites to the parent site's roster.
- The site coordinator must be able to manually add participants to the parent site's roster.

Adding Associated Site Groups for Provided Students in Parent Site
- The system will create a group for each associated site, with the name of the associated site, and students from the associated site will be automatically added to the group.

Removing Provided Students from a Parent Site's Roster
- To remove a provided student from the parent site, the site coordinator must first change the student's role from the parent site, which adds the student to the roster of the parent site. The site coordinator may then remove the student just as he would be able to remove a participant that he had added to the roster himself.

Handling Dropped Students in a Parent Site's Roster
- If a student drops from an associated course, then the provider will no longer provide the student to the parent site. Hence, the student will no longer have access to the parent site unless the site coordinator manually adds the student to the site.
- The data for a student who has dropped from an associated site will remain hidden in the parent site even though the student no longer has access to the site. If the site coordinator adds the student to the site, the student will then have access to the previous data.

Reporting on Dropped Students
- The coordinator must be able to report on a dropped student's data even though the student is no longer provided to the parent site.

Changing the Role for Provided Students in a Parent Site's Roster
- If the coordinator changes the role of a provided student, the student will no longer be provided, so the role will not change from what the coordinator set unless the site coordinator manually changes the role again.

Handling Archiving of Associated Site
- Ensure that the data obtained from an associated site is still available once a course site is archived