

D1: GLOBE Website for Partners and Trainers

**Cornell Lewis, Raytheon Corp.
GLOBE Website Project Manager**

<http://www.globe.gov/web/community-feedback-forum/documents>

Group Documents / Annual Partner Meeting / D1 partner session presentation.pdf

8/13/13



THE GLOBE PROGRAM

Overview

- **Introductions**
 - **Who I Am:**
 - > Was part of the Raytheon team that provided analysis and recommendations off the old GLOBE website in 2011
 - > Served as co-project lead in planning and development of the new website
 - > Project lead for website operations
 - **Who you are: Job Title, Web Use**
- **Goals of the Session**
 - Explain how to use the site as a country coordinator, partner and trainer
 - Provide hands-on-training
 - To understand what your role and job functions are to better meet your needs
 - Listen to your concerns, feedback on how to improve the site

Sections

- **Partner and Country Coordinator Community (private community)**
- **Training Community**
- **Workshop Administration**
 - **Creating Workshops**
 - **Workshop Registration Process**
 - **Managing Workshops**
 - **Workshop Search**
 - **Starting a Workshop**
 - **Post Workshop Tasks**
 - **Finding People Trained at Workshop**
 - **Finding Schools with People Trained**
- **Control Panel Functions**
 - **Managing Schools Associated with your Organization**
 - **Managing Users Associated with your Organization and Schools**



Sections

- **Roles /Permissions of Site Users**
- **Organization Page Functions**
- **State and Territory Pages**
- **Virtual Schools**
- **Partner and School Relationships**
- **New Account Processing / Workflow**
- **Questions and Answers**

Partner and CC Community

- **Location:** *Community > Partners > Partners and CC Community*
- **Private Community Requires Log-in.**
 - Managed by Community Manager and Help Desk
 - Only Partners, CCs and Portal Admin Users have access
 - Central repository for official and un-official GLOBE documents and information on using the system
 - Information on:
 - The Workshop Administration Tool
 - Managing Organizations and People
 - Support Materials
 - GLOBE Metrics
 - Locate and collaborate with other members in the community
 - Post discussions pertaining to partner and CC activities and functions
 - Coming Soon - School/Status and reporting, Partner search tool



Training Community

- **Location:** *Community* > *Trainers*
- **Information about Trainers, Master Trainers and Trainer Collaboration**
 - View Trainer Certification Process Information
 - Link to list of trainers and master trainers on community map
 - Central repository for official and un-official GLOBE training documents, guides and information on using the system
 - Locate and collaborate for other members in the community
 - Post discussions pertaining to training activities and functions
 - Access useful links to other resources
 - Coming Soon – Advanced trainer search capability: search by name, organization, protocols, etc.



Workshop Administration

- Location: *Manage > Control Panel > Workshop Administration*
- Must be Partner, Country Coordinator or Admin User to Access



Workshop Administration



Create a Workshop ▶

Create new workshop in your organization and send out workshop email notifications to your team members.



Workshop Search / Management ▶

Search for existing workshops to manage rosters, workshop trainers and conduct post works shop activities.



People Trained at Workshop ▶

Search for members that have taken workshops created by you or someone in your organization. View training records and send emails to past workshop registrants.



Schools with People Trained ▶

Identify schools with the most workshop registrants. Filter by your workshops or all workshop creators in your organization.



Workshop Admin – Create Workshop

- **Setting up a new workshop:**
 - Create a Workshop
 - Preview the Workshop
 - Add Trainers to Workshop (improved search in development)
 - Change Workshop Status to Active
 - Verify that Workshop is Displaying on the Public Page
 - Workshop will also display on your events page on your organization site



Workshop Registration Process

- **Location:** *Events > Workshops*
- Site users can search workshops by:
 - Country
 - Intended Audience
 - Protocol
- Coming Soon:
 - Ability to search using a map interface
 - Improved workshop list and detail page – ability to add workshop location photos, better page layout
- After registering for a workshop, the user is added to the workshop registration list with a 'pending' registration status



Workshop Admin – Manage Workshop

- **Pre-Workshop Roster Management:**
 - Confirming those who have registered for the workshop – change their status from Pending to Registered
 - Adding members to the roster
 - GLOBE Members
 - New Members
 - Viewing Members Records
- **Determine Resources/publication needed**
- **Contact Workshop Participants as needed**



Workshop Admin – Manage Workshop

- Account status workflow after user registers for a workshop. Account status defines the person's site permissions. See 'managing users' for more info.

User Status	Filled out GLOBE account request form/signed up for workshop	Accepted into a training	Training Begins	Completed Training
Account Status	Account requested	Pre-candidate	Candidate	GLOBE member
Training Status	Untrained	Untrained	In-training	Trained
School status	Requested Organization	Pre-candidate school	Candidate school	GLOBE school



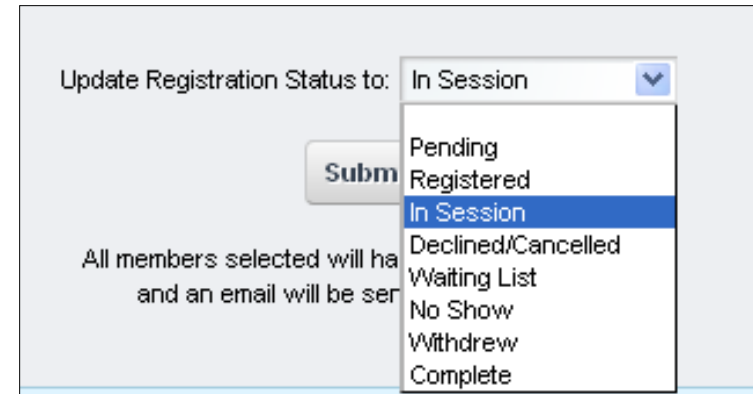
Workshop Admin –Workshop Search

- **Select Your Organization – All workshops created by selected organization and sub-organizations under it will display**
- **Use the advanced filter to further filter results**
 - Country: Show all workshops located in selected country
 - State/Territory
 - Workshop ID
 - Location
 - Etc.
 - By Protocol – either any protocol or all protocols selected
- **Roll-over investigation area to see full list of protocols taught**
- **Export to file**
- **Select workshop location to manage that workshop**



Workshop Admin – Start of Workshop

- Change workshop registration status of those participating to ‘in session’
- This will give the participants the ability to start entering data on the training site.



The screenshot shows a web interface for updating registration status. It features a label 'Update Registration Status to:', a dropdown menu, a 'Submit' button, and a confirmation message. The dropdown menu is open, showing a list of status options with 'In Session' selected.

Update Registration Status to:
In Session
Pending
Registered
In Session
Declined/Cancelled
Waiting List
No Show
Withdrew
Complete

Submit

All members selected will have their status updated and an email will be sent.



Workshop Admin – Post Workshop

- For those who completed the workshop, change their registration status to completed. This updates the user's training status and give them the account status of 'GLOBE Member'.
- Complete any post-workshop documents
- Fill out post-workshop summary field found on the workshop creation form
- Send Principal Letters and GLOBE Certificates
- Contact participants again, if needed.



Workshop Admin – Other Tools

- **People Trained at Workshop**

- Search for members that have registered for a workshop. Default view is all workshops created by your organization and sub-organizations under it. Use the 'Filter by' to view only workshops you created
- Use the advanced filter to search by member or workshop attributes
- You can also filter by protocols people have been trained in
- Roll-over the workshop location to view protocols taught
- Click on the member's name to see their full training records
- Export to file
- Send email to those listed (currently inactive, fix in progress)



Workshop Admin – Other Tools

- **Schools with People Trained at Workshops**

- View schools that have people who have registered for a workshop. Default view is all workshops created by your organization and sub-organizations under it. Use the 'Filter by' to view only workshops you created
- Click on the school name to view people trained at that school. Advanced filter will populate organization field with selected school



Control Panel Functions

- **Managing Schools Under your Partner/CC Organization.**

As a partner or CC, you must have the organization manager role to manage schools/organizations under your partner/country organization. If you do not have this role, contact the Help Desk to have it added to your profile.

- In the control panel, click on 'Organizations' on the left. As an organization manager, you can manage your organization and organizations that are under your partner/country organization. Select an organization to:
 - Change the org logo
 - Modify the org address
 - Add Lat/Long/Elevation
 - Change the status (requires workshop override)



Control Panel Functions

- Managing Schools Under your Partner/CC Organization (cont)

Regarding Organization Status:

The system will automatically advance the organization status of a new school as the new member associated with the school advances through the workshop process. See 'managing users' for more info

Details
Name 1st Colonial High School
Type school_organization
Status <input type="checkbox"/> Workshop Override <input type="radio"/> Requested <input type="radio"/> Approved <input type="radio"/> Pre-Candidate <input type="radio"/> Candidate <input checked="" type="radio"/> GLOBE School <input type="radio"/> Inactive
Group ID 86835



Control Panel Functions

- **Managing Users Under your Partner/CC Organization.**

As a partner or CC, you must have the organization manager role to manage people under your partner/country organization.

- In the control panel, click on 'Users' on the left. As an organization manager, you can manage users that are in your organization and organization under your partner/country organization. Select an user to:
 - Change their user information (including their password)
 - Assign them to additional organizations and communities
 - Manage their GLOBE User Groups (more on next page)
 - Manage their training record
- Note: You cannot manage members who have equal or higher permissions than use. I.E. – Partners cannot edit Country Coordinator profiles

Control Panel Functions

Managing Users - GLOBE User Groups:

Click on 'GLOBE User Groups' for the selected user in their profile (on right column)

User Groups are grouped by specific metadata types:

- Training Status
- Account Status
- User Type

The system will automatically put new members into the correct user groups as they proceed through workshop process.

Admin/Help Desk/Partners and CCs have the ability to override workshop process to assign account status

Training Status

Trained

Account Status

☐ Workshop Override

- ☐ Account Requested (Membership Requested)
- ☐ Account Approved (Identity Confirmed - no Permissions)
- ☐ Pre-Candidates (Accepted into Training)
- ☐ Candidates (Currently in Training)
- ☒ GLOBE Members (Full Member)

User Type* (Select One or More)

- ☐ Affiliates
- ☐ Alumni
- ☐ Blogger
- ☐ GIAC
- ☐ GPO
- ☐ Interested Public
- ☐ Master Trainers
- ☐ Pre-Service Teachers
- ☐ Scientists
- ☒ Teachers
- ☐ Trainers
- ☐ Country Coordinators
- ☒ Partners



Control Panel Functions

Managing Users - GLOBE User Groups:

- **More on metadata types**

- **Account Status** – defines the person's GLOBE status and permissions on the site.
- **Training Status** – defines where the person is in the training process (untrained, in-training, trained).
- **User Type** – defines the person's job (teacher, scientists, pre-service, interested public, etc.). These user groups are not associated with site permissions



Control Panel Functions

Managing Users - GLOBE User Groups:

- To ensure members have the correct permissions on the site, account and training statuses are synced
- Account Requested/Approved, Pre-Candidates can only have the 'Untrained' training status
- Candidates can only have the 'In-Training' status
- GLOBE Members are not synced and can have any training status

Training Status
In-Training

Account Status
<input checked="" type="checkbox"/> Workshop Override
<input type="radio"/> Account Requested (Membership Requested)
<input type="radio"/> Account Approved (Identity Confirmed - no Permissions)
<input type="radio"/> Pre-Candidates (Accepted into Training)
<input checked="" type="radio"/> Candidates (Currently in Training)

Training Status
Untrained

Account Status
<input checked="" type="checkbox"/> Workshop Override
<input checked="" type="radio"/> Account Requested (Membership Requested)
<input type="radio"/> Account Approved (Identity Confirmed - no Permissions)
<input type="radio"/> Pre-Candidates (Accepted into Training)
<input type="radio"/> Candidates (Currently in Training)
<input type="radio"/> GLOBE Members (Full Member)



Control Panel Functions

Managing Users Continue - GLOBE User Groups

As a Partners or CC, you can assign member to:

- Organization Manager Role
- New Account Notification Role

Special Permissions

Organization Manager

Organization Managers are given the ability to modify content and users associated with their school or organization

Schools

Organization Name	School Manager
10X207 (USNY57RO)	<input type="checkbox"/>
P.S. 188Q	<input type="checkbox"/>

Showing 2 results.

New Account Notification

Users with this permission will receive an email anytime a new user requests to join GLOBE and who has said they are part of the user's organization

☐ Send New Account Notifications



Roles / Permission for Users

Users Account Status	Acct Requested	Acct Approved	Pre-Candidate	Candidate	GLOBE Member
Has a My Page	N	N	N	Y	Y
Can post comments	N	N	N	Y	Y
Can post to forums	N	N	N	Y	Y
Can have a student account	N	N	N	Y	Y
Shows up in search results	N	N	N	Y	Y
Shows up in their organization member listing	N	N	N	Y	Y
Added to GLOBE metrics page	N	N	N	N	Y
Added to partner/CC metrics page	N	Y	Y	Y	Y
Can enter training data	N	N	N	Y	Y
Can enter production data	N	N	N	N	Y
Shows up on the community map	N	N	N	N	Y
Can request friends	N	N	N	Y	Y



Roles / Permissions for Organizations

Organizations	Account Requested	Account Approved	Pre-Candidate	Candidate	GLOBE School	Inactive Partners
Organization Page	N	N	N	Y	Y	Y
Shows up in Search	N	N	N	N	Y	Y
Shows up in parent list of sub-organizations	N	N	N	N	Y	N
Shows up on Community Map	N	N	N	N	Y	N
Added to GLOBE Metrics page	N	N	N	N	Y	N
Added to partner/country rewards and recognition metrics	N	Y	Y	Y	Y	N



Organization Page Functions

Managing Content For Your Partner/CC Organization (cont)

- **Editing the welcome text on your organization page**
 - After logging-in, navigate to your organization page
 - Make sure the 'Toggle Edit Controls' is checked on top bar
 - Select the edit web content icon on organization page to edit welcome text



- Use the text editor to modify the content

Organization Page Functions

Managing Content For Your Partner/CC Organization.

As a partner or CC, you must have the organization manager role or the content contributor or reviewer role to manage content. If you do not have this role, contact the Help Desk to have it added to your profile.

- **Posting Events/News Items on your Organization Page**
 - Workshops are automatically posted on your organization page when you create a workshop
 - Location: *Manage > Control Panel > Organization > CMS Events/News*
 - Associate entry to an organization to filter by country/state
 - Associate to a member (for future functionality on My Pages)
 - Associate by category



Organization Page Functions

Managing Content For Your Partner/CC Organization (cont)

- **Modifying Your Organization Contact Info**

Location: *Your Organization Page > Contact Info Page*

- Locate the GLOBE Member Info Portlet on the page
- Click the wrench icon
- Select 'Current' to edit an existing contact name
- Select 'Available' to add a new contact name

Click the wrench icon to setup your organization contact information

GLOBE Member Info - Configuration

Setup

Permissions

Sharing

Current

Available

☐ User Name
Cornell-partner Lewis

☐ Addresses
Use Organization Address

☐ Phone Numbers
Use Organization Phone

☐ Email Addresses
Use Organization Email

Save

Edit User

GLOBE Member Info - Configuration

Setup

Permissions

Sharing

Current

Available

Search

Advanced >

Name	Screen Name
Jerry Cobbs	cobbsj
Cornell Lewis	cornelllewis
Cornell-partner Lewis	cornell-test1b
Lynn Vaughan	lynn

Showing 4 results.



Organization Page Functions

- **Coming Soon – GLOBE Science Honor Roll**
 - Totals are rolled up on your organization page
 - For details of Honor Roll, click on 'View honor roll details'
 - Takes you to the Honor Roll Recognition section with your organization selected. Explore Science > Science Honor Roll
 - Delivery date: mid September



State / Territory Pages

- State page list partners who reside in the state
- Schools are listed on state pages based on address and not organization hierarchy. This will allow schools managed by partners outside of the state to still be listed on the state page
- Schools not associated with a partner will be placed under a state organization until a member of the school enrolls in a workshop which will cause the school to be moved under the workshop partner's organization.

California



California Partners

[AERO Institute](#)
38256 Sierra Highway Palmdale, 93550

[Central San Joaquin Valley Partnership](#)
5010 N Woodrow Avenue Fresno, 93740

[Endeavour Center, NASA Educator Resource Center](#)
1145 Mountain View Boulevard Vandenberg AFB, 93437

[Jet Propulsion Laboratory](#)
4800 Oak Grove Drive Pasadena, 91109

[Los Angeles Unified School District](#)
1630 Walgrove Avenue Los Angeles, 90066

Parent Organizations

 North America

 United States of America



Virtual Schools

- **Virtual school organizations are used to house those members who are not currently associated with a school (such as pre-service teachers)**
- **Every country, state/territory and partner has a virtual school organization and the system shall automatically create the virtual school when the parent organization is created**
- **Virtual schools do not have a true address so virtual schools are not located on community maps. However, virtual school members shall be able to create data sites which will be displayed on the map.**



Virtual Schools

Naming Convention:

- Japan (country)
 - Japan GLOBE v- School

- California (state)
 - California GLOBE v-School

- AERO Institute (partner)
 - AERO Institute GLOBE v-School

<input type="checkbox"/>	<u>Name</u> ▲	Parent Organization	<u>Type</u>
<input type="checkbox"/>	3RF Sciences, LLC GLOBE v-School	3RF Sciences, LLC	virtual school organization
<input type="checkbox"/>	Adams County/Ohio Valley School District GLOBE v-School	Adams County/Ohio Valley School District	virtual school organization
<input type="checkbox"/>	AERO Institute GLOBE v-School	AERO Institute	virtual school organization
<input type="checkbox"/>	Agrupacion Ocho GLOBE v-School	Agrupacion Ocho	virtual school organization



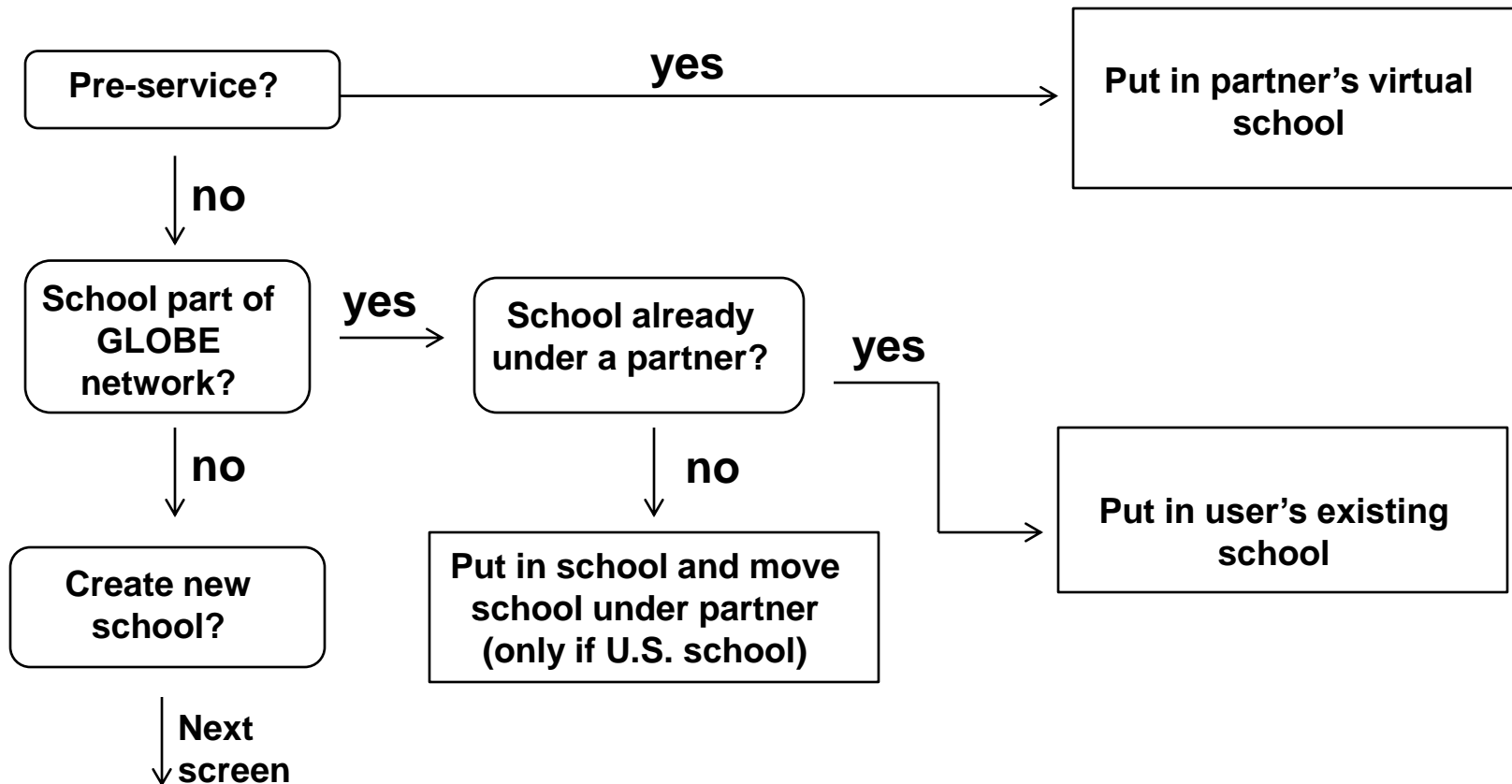
Partner / School Relationships

- **Workshops shall drive which schools and teachers a partner organization is associated with instead of state based affiliation.**
- **Any user who signs up for a workshop will be automatically associated to the partner via a partner organization to school organization relationship – unless their school is already associated with a different partner.**
- **The partner who is the first to teach a teacher at a given school is considered the primary partner for that school and will have the rights to edit/modify the school and all teacher information associated with that school.**
- **If a partner leaves GLOBE and their account becomes inactive, all schools under that partner shall be moved up so they are sub-organizations of their respective state or country.**



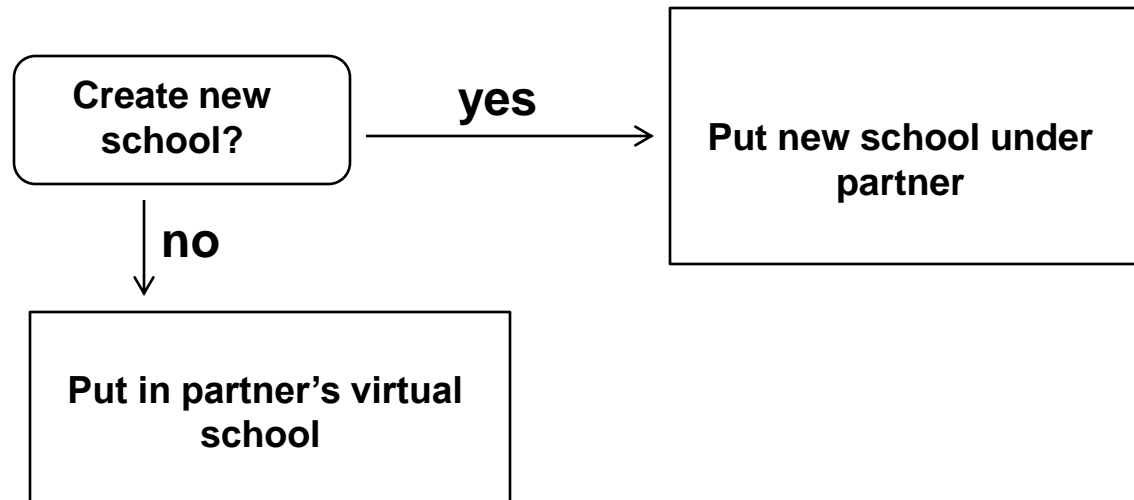
New Account Processing / Workflow

New Account Processing – user is registering for a workshop



New Account Processing / Workflow

New Account Processing Changes –through workshop registration



Questions and Answers

