



Colorado School of Mines Trailhead Tab Administrator's Policy and Guidelines

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I. Introduction

The presentation of the CSM portal, Trailhead, consists of several tabs with each tab containing one or more channels. The layout of the channel(s) on each tab is managed by a Tab Administrator who uses Aggregated Layout Management ("ALM" for short – for more information see below) to configure channels and the columns that hold them. This document establishes the expectations for a Tab Administrator as well as a few guidelines to assist in the administration of a tab.

II. Synopsis of Channel Approval Steps

1. Channel Request form is filled out and submitted.
2. Tab Administrator notifies requester that request is approved and provides information as required for requester to begin development of the channel using "overlook" (the portal test server).
3. Requester develops prototype channel and interacts with Tab Administrator as necessary.
4. Requester submits URL of channel to Tab Administrator for final approval.
5. If approved, Tab Administrator contacts Portal Administrator to add channel to production server.
6. Requester or their designee maintains channel.

III. Tab Administrator Responsibilities

1. Identify backup administrator(s) to fill in when primary Tab Administrator is on leave. Notify the portal administrators of who the backup Tab Administrator is and any dates when the primary Tab Administrator unavailable.
2. Work with the portal administrators, the Portal Content Committee and others to determine future direction/content/purpose of the CSM portal and their tab in particular. Tab Administrators will work with the Portal Content Committee and others as needed to establish the focus of their tab.
3. Configure and be responsible for the continuing default layout of the tab. Considerations include:
 - a. Know, support and enforce (1) The Portal Design Guidelines as published in the Portal Design Guide and as determined by the Portal Content Committee and others and (2) The Channel Development Work Flow as specified in the Channel Development Overview and as determined by the Portal Content Committee and others (see *Related Resources* links at the end of this document).
 - b. Monitor the number of CPIP channels that are included on the default layout of the tab and check the speed of how the tab loads and displays. CPIP channels should be limited to 3 or less per tab. (CPIP is an Integration Protocol permitting channels to perform a Single Sign On to an External System on behalf of the user. The concern about performance and the suggested limitation only relates to channels that do such authentication immediately upon the channel's Tab being viewed, and not for channels where the user must click a link, button or icon prior to an authentication attempt being made.)
 - c. The number and width of columns.
 - d. Layout of the default channels presented in the column(s).
 - e. Changes to the default tab layout are carefully considered, tested thoroughly on the test server, and implemented with the approval as needed of the portal administrators and Content Committee.
4. The level of user customization allowed (see the Trailhead Design Guidelines [<http://acn.mines.edu/policies/trailhead/designguide.pdf>] in the Related Resources section below).
5. Determine if other flexibility is permitted on their tab (for example, Allow/disallow adding/removing columns; allow/disallow configuring column widths; allow/disallow adding/removing channels, moving channels, etc.). Content and usage should provide guidance regarding the level of customization allowed.
6. Oversee and assist the development of channels designed for the tab by campus constituents:

- a. Evaluate channel proposals for "channel worthiness":
 - *A channel should avoid duplicating content provided by other developers;*
 - *The nature of the channel should preclude having the information included in an existent channel;*
 - *The channel's subject should have a wide audience – channel developers with smaller audiences should consider using Group Studio;*
 - *A plan to maintain the channel content should be evident.*

Tab Administrators should stay up-to-date on other channel content in the portal. If a Tab Administrator and channel developer cannot agree if a channel should be placed or categorized under a given tab, the issue should be referred to the Portal Content Committee for review.

- b. Verify that Channel Development Requirements and Recommendations are adhered to (style sheets, accessibility, copyright, "eligibility" etc.), as determined by the Portal Content Committee and others.
- c. Provide technical assistance as needed for channel developers regarding the nuances of channels, the options available and current practices ("role" applicability; use of web authoring tools, height/width constraints of channels; image inclusion; linking, etc.)
- d. Work with channel developers to determine the most ideal location of their channel within your tab.
- e. Work with the portal administrators and others to develop on-line resources to assist channel developers.

7. When appropriate, Tab Administrators should work with the channel developer and the portal administrators to find appropriate methods for announcing the new channel.

8. If a channel appears to be out of date the Tab Administrator should contact the channel owner and proceed as necessary, using whatever resources are required, to resolve problems related to the continued maintenance and viability of the channel. This directive is not meant to replace the usual regularly scheduled reviews of channel content as provided for in the "Portal Content Review Policy" document. Occasional harmless bits of out-of-date content can remain for short periods of time pending such a review, although ideally Tab Administrators and Content Owners will be vigilant in keeping this material up to date as it presents a fresher, more attractive and professional appearance. However, there will from time to time arise situations where out of date content is seriously misleading,

distracting, harmful or simply too old, and in such cases it is imperative that it be updated promptly even prior to the scheduled review.

9. If a channel appears to have changed to provide inappropriate or unacceptable content, the Tab Administration should contact the portal administrators.
10. The Tab Administrator shall responsibly use judgment concerning the frequency and degree of changes they permit to the number, placement and structure of the channels on the Tab they administrate. Members of the Colorado School of Mines community will be visiting the Tab to receive useful, interesting and up to date information, services and links. Therefore this material should change frequently enough to address these needs, but not so frequently that users become disoriented and unable to easily find material of interest that they had previously located. The structure should change less frequently than the content inside that structure. Review the newspaper analogy in the "Trailhead Design Guidelines" [<http://acn.mines.edu/policies/trailhead/designguide.pdf>] document in section 4B.

IV. Tab Administration Process

To configure the layout of a tab as needed or as directed by the Portal Content Committee or others (overlook should be used to do all testing):

1. Login as ADM "-lo: user.
2. Configure the default layout of the tab for the user logged in – DO NOT ADD ADDITIONAL TABS!
 - a. Set the number of columns.
 - b. Add channels to the view.
 - c. Configure customization options.
- d. Set customization parameters for columns and channels.
3. Logout.

Note: a user with the correct role will be able to view changes at their next login.

V. Aggregate Layout Management (ALM)

ALM is the name given to the process of creating a default view and pushing content to end users of the portal. CSM's implementation of ALM is such that an ALM user has been created for each role (allusers, student, employee, faculty, and research). Each role in turn has specific tabs assigned to it. That account is in turn used to control the default layout of the tab including such things as the number of columns presented and the channels on those columns. The ALM user for a tab also has the ability to "lock" one or more columns and/or channels so that a user will always be presented with that particular content and depending upon the amount of

locking specified, may not be able to change some of parameters for the column or channel.

The items below summarize some of the behaviors of ALM that a Tab Administrator should be aware of:

Columns and Channels

- Columns and Channels added by the ALM user “belong” to ALM and can be changed via the ALM user’s settings.
- Columns and channels added by the end user “belong” to the end user and can only be changed by that user. In other words, if a user completely deletes all channels and columns on a tab and then recreates the layout of the tab exactly as it was originally, changes made via ALM will not be reflected on the tab for that user’s account.

Channel Location

- If a channel is added through ALM and moved by a user, the channel “belongs” to ALM, but its location “belongs” to the user. That is, the channel may be deleted, resized, etc. via ALM, but its location cannot be changed by anyone except that user.

Column Width

- User can modify column widths (regardless of settings made in the default layout for the tab). If he/she does, the column width “belongs” to that user. The column can still be modified via ALM, but changes to the column widths in ALM will not be reflected on that user’s layout.

Channel Height

- Users cannot modify the height of channels added via ALM. Users are able to get to the form that allows them to change the height, but the height is automatically reset back to the height specified by the ALM user for the tab. Changes to channel height for user-added channels (as opposed to channels added to tabs using ALM) act as you would expect.

VI. Related Resources

Document or Resource	Location
Trailhead Mission Statement	http://acn.mines.edu/policies/trailhead/mission.pdf
Trailhead Design Guidelines	http://acn.mines.edu/policies/trailhead/designguide.pdf
Channel Development Request Form	http://acn.mines.edu/trailhead/channeldevrequest.shtml
Channel Development Policy	http://acn.mines.edu/policies/trailhead/channeldevpolicy.pdf
Trailhead Content Review Policy	http://acn.mines.edu/policies/trailhead/reviewpolicy.pdf
List of Tab Administrators	http://acn.mines.edu/trailhead/tabadminslist.shtml
Tab Administrators' Policy	http://acn.mines.edu/policies/trailhead/tabadminpolicy.pdf
CSM Groups Policy	http://acn.mines.edu/policies/trailhead/CSMgroupspolicy.pdf
Targeted Announcements Policy	http://acn.mines.edu/policies/trailhead/annoucepolicy.pdf
Default Portal Stylesheet	http://acn.mines.edu/trailhead/styles/stylesheet-portal.css