

# Transition US Initiative Sharing & Project Sharing Engine: Basic process and behaviour summary

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## ***Introduction***

This document looks at the similarity between the Project Sharing Engine (PSE) and Transition US Initiative Sharing (TUSIS) with regards to behaviours and processes. Technical issues surrounding data, transport, APIs, protocols and architecture are left for another document later in the PSE project. I'll focus on PROJECT sharing, with an eye on making this general so that initiatives and other details can be shared in future.

## ***Principles***

1. We are focussed on sharing Projects (first) and Initiatives (as a by-product/later) entities.
2. 'Sharing Engine' broadly means sharing user interface across websites to facilitate the entry, storage and display of such entities. This project is not about distributed databases or cloud storage (yet).
3. The UI consists of three broad areas:
  - **Entry widget:** Data input forms on participating websites.
  - **Moderation:** Managing added data, deciding where/how it should show.
  - **Display widget:** Listing, searching, feeding and dissemination of (moderated) data to participating websites.
4. There are 4 broad user types necessary for proper description of processes:
  - **Visitor:** Someone arriving at any participating website wanting to view the data
  - **Submitter:** A visitor who wants to/is submitting their Transition-related entities to the system
  - **Webmaster:** A web point of contact for a participating website, AND the moderator of submissions via their website from the widget(s).
  - **Administrator:** A (probably) Transition Network or related person who manages the system and its relationship with [www.transitionnetwork.org](http://www.transitionnetwork.org), moderation and Webmasters.
5. There are 4 known parts to the system, architecturally speaking.
  - **Sharing Engine** a website that creates forms, stores data and provides moderation UI. It should also provide feeds of moderated entities for other websites. MAY be [transitionnetwork.org](http://transitionnetwork.org), but probably shouldn't be for many reasons.
  - **Widgets** for entry and display on participating website -- effectively exposing the SE's UI.
  - **Participating websites** that host widgets.
  - **Transition Network website** displays moderated information; (probably) provides authentication for users; MAY be the Sharing Engine, but more likely (based on my hunch) communicates with it and collects feeds from it.

## ***Proposed process***

Using the principles listed above, we need to expand upon the process and demands of each part of the UI...

## 0. Webmaster/widget setup

Before we can start, webmasters must agree to the process and add a widget (or two) to their website.

1. **Webmaster & site are accepted:** this process is beyond the scope of this document, so we assume they're ready and willing. What might be needed is some kind of 'Participating site node' to track and manage widgets and submissions.
2. **Webmaster gets widget(s) code:** we provide them with the HTML & JavaScript (or Drupal/Wordpress module) to put the widget on their website. This code must include a unique key that matches their site's domain the system knows what site/user is responsible for submitted content.
3. **Webmaster includes code in website:** They 'install' the widget(s) and test/modify as needed.

## 1. Entry widget submission

1. **Submitter wants to submit:** their project on a participating website.
2. **Entry form in widget:** Shows part of the PSE's Entry UI that allows core information to be submitted on a participating website.
3. **Submitter adds contact information:** mandatory; we need to know who submitted it so they can be contacted, thanked or asked to elucidate later in the moderation process
4. **Project information entry:** The submitter adds their project information.
5. **Validation:** most shortcomings and mistakes must be handled by the form 'in real time' and also after the form is submitted.
6. **Confirmation:** when a submitter finishes and validation is passed, they should be thanked on screen and via email.

## 2. Moderation process

1. **Webmaster is notified of submission:** An email or other message is sent to the Webmaster who's site has had a widget submission. The message contains a link to the moderation view of the widget.
2. **Webmaster logs into PSE:** Where upon they use their Transition Network credentials (or possibly social networking authentication) and then go to their Sharing Management page
3. **Webmaster checks/edits submission:** they read it and correct any minor issues.
4. **Webmaster completes moderation:** the submission is either:
  - **Accepted (All):** this means the submission will soon appear on ALL participating websites.
  - **Accepted (Some):** (optional) this means the submission can go on their site (and related/nearby sites?), but might not be suitable for all sites or TN.org -- it's passed to an Administrator for further moderation.
  - **Rejected (Needs work):** the submission is not acceptable (reason should be given) and a message is sent to the submitter either asking them for more information, or explaining why.
  - **Rejected (Removed):** Poor/spammy or those marked 'needs work' but not updated are deleted. Submitter may be notified if legitimate/non-spam.
5. **Administrator does moderation:** similar process as Webmaster, but admins are notified of any accepted submission should check to see if it's acceptable, properly categorised (if we're doing that?) and is 'Transitiony' enough for TN.org.
6. **Submitter gets notification if accepted:** thanking them if it's and giving a TN.org URL.

### 3a. Display use (Participating website)

1. **Accepted projects added to PSE feed:** Good stuff is made available to a feed which the participating website's widgets will use to list/filter the available options.
2. **Display widgets need filtering setup:** showing ALL the world's projects won't work on most sites, so filtering needs to be included with the widget, OR set up during widget code creation/download.
3. **Display needs to be simple, but with 'drill down':** showing all project information won't work, neither will just a few fields... Some means of seeing the whole thing and contacting the project is needed/

### 3b Display use (Transition Network)

1. **Feeds (IF PSE is separate site):** A similar feed provided to widgets should be provided to TN.org (and other trusted sites) that allow import of PSE items into proper Project nodes.
2. **Project node creation:** Takes PSE submissions (from submitted nodes OR feeds) and makes 1st-class project nodes of them
3. **Filtering:** Once added, Project nodes will be filtered and added to various pages, views and feeds.

### *Questions/Issues raised*

1. Are submissions (projects/initiatives etc) categorised? What standard vocabularies (s) should be used?
2. Apart from location and categorisation, is there any other way of
3. How can submitters edit their earlier-submitted work if it 'needs work'? AKA What to do with the "nearly good enough's"?
4. Do we allow ALL submissions accepted by webmasters to go on TN.org without moderation?
5. Moderation accounts for much of the development, is this expected or do we need a simpler approach?
6. We'll need a meaty Terms of Access etc, which might need lawyers.
7. I reckon most of this is applicable to TUS Initiative sharing, but the key difference being that there will be one 'Webmaster' (Carl) and Initiative nodes can be significantly more complex with their contacts, relationships and connection to users and data.

### *Satellite or monolith?*

This document does its best to ignore technical and architectural issues, but my burning question is: **Is the PSE a separate service-based website, or integrated into TransitionNetwork.org?**

- If so, we have future-proofing and flexibility at the cost of integration and authentication issues.
- If not, we have server performance, data quality and flexibility needs. I think TN.org is just a fancy client to the PSE, much like it is to the original SE.
- If so, is it Druapl 7 since that has powerful web services features.
- If not, what do we do if it's wildly successful? (If so, what do we do if it's not!?)
- If done cleanly, separating the PSE from the TN.org site will mean future development of both sites, and the sharing of other entities (initiatives, events, news) will be much easier.
- If done poorly it may represent a over-complication of the project and and increased likelihood of failure.

My gut says 'Satellite'... For discussion.