CCTAM Base

Design

1. A clean and simple look and feel with good use of white space.
2. System to feature a Map that displays assets, using their addresses.
3. Simple menu structure with the following main sections: Home, Listing, Map, New Asset, Partners, Support -> (User Guide, Contact, FAQ)
4. Tooltips on particular labels to help the user with data entry

System

1. Portal to be built on web standard technology: PHP, Mysql, HTML, CSS, Javascript, JQuery.
2. Browser Compatibility: Internet Explorer 9 or higher, Safari 5 or higher, Firefox, Chrome
3. Viewable and useable on mobile devices (tablets / phones) using IOS + Android + Windows Mobile
4. Data and server to be located in Canada
5. When an URL is accessed, if login is involved then the user should be taken to the target page after login
6. System to use methods to encrypt user passwords, prevent SQL injection, and reduce spam

User (*All non-visitor functionality assumes login)

1. Role: Visitor: Can only access the home, signup, login, and preview page
2. Role: Member: Has Visitor rights, the ability to access the full listing / search page, map and submit add / change / delete request.
3. Initial Member fields: Name, Phone, Address, Email, Organization, Type, Referral, Subscription, Expiration
4. Role: Admin. Has the ability to approve change requests. Has the ability to view / add / edit / delete records to all tables.
5. All new Members must validate their emails then manually validated by an Admin

Functionality

1. User will be able to switch languages (English / French) on any page using a dropdown. This will change languages for labels, buttons, content text (anything that is not data)

2. System will feature a simple discussion board that allows Members and Admins to create threads, posts / replies

3. Initial homepage contains an introduction and basic forms to allow users to login and sign up (fields to be determined). This page may also contain sponsor logos

4. Preview page to include a static set of fields and records (eg. first 50 in database), search / filter capabilities are limited to Profile Name, Profile Type, Description

5. Map page interactive map to allow zooming and panning. Clicking on an asset shows basic information with link for more details

6. Map page to feature filters / searches to control which assets are displayed on the map. By default, we only show assets that have city field filled out

7. Map page to allow users to save their searches

8. Listing to display all assets with pagination features. Default fields to show are Profile Name, Profile Type, Research Type, Description, Home Settings

9. Listing page to feature search / filter fields to control which assets are displayed. Searches in each field use the OR operator, searches between fields use the AND operator

10. Listing page to feature module allowing users to select which fields are shown

11. Listing page to feature module allowing users to select which fields are searchable / filterable. Default fields are Profile Name, Profile Type, Research Type, City, Description, Ethics Board, Disease Conditions, Patient Population, Phases Of Research, Year Established

12. Listing page to allow Members and Admins to export records (even when filtered). Fields displayed in excel are determined by which fields the user chooses to display in listing. Fields with multiple values are display comma separated in single cell. Labels will be in English / French depending on the chosen language

13. Listing page to show "highlighted" Assets at top of listing front page (sticky)

14. Listing page to show sponsor logos under the Asset listings, the logos and links can be set by Admins (CMS)

15. Members and Admins will have a home dashboard. Default view may include: highlighted assets, sponsor logos, discussion board posts, quick links, new Assets, link to listing page, saved searches, saved assets

16. Members and Admins can change their settings to save which elements appear on their dashboard. May not apply to all elements (TBD)

17. Members and Admins have the ability to save searches and save favourite Assets

18. Members have ability to create add / edit request to Partners sections (Quick links)

19. Members have ability to change certain aspects of their profile information (eg. email, phone number, etc.)

20. When entering Assets, if user chooses "Other" as a pre-set option, then textbox appears to enter additional info.

21. Assets, categories always keep the same ID, even on edit approvals

22. Add / Edit / Delete Request form for Asset to for Members. Use of checkboxes + dropdown + datetime picker where appropriate

23. When adding / editing an asset (or making a request) user has the ability to upload an image file (.jpg, .png) as logo

24. Admin section for users to change settings such as getting notifications, changing email addresses, enabling members

25. An interface for Admin's to Add / edit content: Homepage write up, Map write up, Quick links (partners), FAQ, Contact write up, Sponsors. English and French text available

26. Admin section keep revisions / request history

27. The system will email Admins set up for notification when a add/change/delete request has been submitted

28. Change request approval page will show current record and requested changes with a button to approve or deny.

29. When admins approve / decline requests, an email get sent to the submitter regarding the result

30. A form in the Support section that will allow users to ask a question or submit an issue. This will email the developer and any Admins set up for notification

31. Pages to feature a social "ShareThis" icon

32. System can accommodate parent categories (2 levels initially). Choosing a child (sub) category will automatically choose the parent category.

33. "New Asset fields to be included: PI Name, PI Phone, Company Name, PI Address, SC Name, SC Phone, CV (File uploads, many to one)"

Extra Functionality

1. Ability to link assets to each other with an "associated to" relationship.

   - This will require a change to institution and network fields to checkboxes in order to choose asset(s) to link.
   - When creating / editing an asset, the checkbox lists will be pre-filtered based on the asset's profile type ("institution" or "network").
   - The asset currently being created / edited will be the child asset. For example, if you are creating a site, you would choose the institution it belongs to.
   - Once linked, the associations will be shown in the profile pages of both assets in the relationship. For example, for the site, the networks and institutions it belongs to will be shown under the "Networks" and "Institution" fields respectively. For the institution / network, the assets that belong to it will be listed under a new "Associations" section

2. Cron job to email assets that have not been updated in the past year

   - This will require creating a database query that will run on a yearly (adjustable) basis
   - The query will search the database and retrieve all records that have not been updated for one year or more
   - The system will email each asset, providing a custom link to their asset profile page with a reminder (provided by Rx&D) to update their information

3. Add search option to view results as table / grid.

- We will add a new button to the listing page search / filter section that will allow users to "View results in table."

- Instead of the existing listing format (eg. http://assets.bccrin.ca/listings.php), users will see a grid / table format of the assets with pre-selected filters applied. Example of the format:

| Investigators | | | | | | | | |
Name	Department	Faculty	University	Institution	E-mail	URL	Disease / Condition	Specialty
Abel, James	Cardiovascular Surgery	Surgery	UBC	Providence Health Care Research Institute	E-mail	Link	SURGERY	CV / CARDIOLOGY
Abu–Laban, Riyad	Surgery	Medicine	UBC	Van Coastal Health Research Institute	E-mail	Link	N/A	CRITICAL CARE, EMERGENCY MEDICINE
Agranovich, Alexander		Radiation Oncology and Developmenta Radiotherape	UBC	BC Cancer Agency		Link	PROSTATE	CANCER
Alexiadis, Alexandros				Fraser Health			PALLIATIVE CARE	OTHER
Alimenti, Ariane	Paediatrics	Medicine	UBC	Child & Family Research Institute	E-mail		HIV	ID/ INFECTION
Al–Tourah, Abdul				BC Cancer Agency	E-mail		BREAST, LYMPHOMA	CANCER
Amed, Shazhan	Pediatrics	Medicine	UBC	Child & Family Research Institute	E-mail	Link	DIABETES	METABOLIC/ ENDOCRINE
Amil, S				BC Cancer Agency			GASTROINTESTINAL	CANCER
Anderson, Frank H	Medicine	Medicine	UBC	Van Coastal Health Research Institute	E-mail	Link	COLITIS, CROHN'S, HEPATITIS	GASTROINTESTINAL ID/ INFECTION
Anderson, H.				BC Cancer Agency			GASTROINTESTINAL LUNG	CANCER

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ADD ➡

- Default fields will be the same as the listing page "Profile Name, Profile Type, Research Type, Description" with the ability to click to view the asset profile page
- Ability to change which columns are displayed (up to the same fields that are on the search / filter options: http://assets.bccrin.ca/listings.php?opt=L)
- Search / filter disabled but have the ability to export to excel.

4. Add default logo ("no logo provided") for blank entries, Add "no address provided"

- For the listing and asset profile pages, when an asset did not upload a logo, a default image reading "No logo provided" will be shown in place of a logo.

- For the asset profile pages, when an asset did not provide an address, a default message reading "No address provided" will be shown in place of a map

5. Map Page: When an asset is clicked, details should include a list of associations that belong to the asset clicked

6. Ability for Admins to search assets on last modified date (to be included in search/filters on the listings page)
   a. MWS will research ways to get a report on bounced back emails from cron jobs. Since this is an unknown and non-trivial, it will be quoted separately.

Glossary

- **Captcha:** A method to prevent spam on forms. Eg: http://www.google.com/recaptcha
- **CMS:** Contact Management System
- **ShareThis:** A social sharing tool: www.ShareThis.com
- **WYSIWYG:** What You See Is What You Get. Example: http://ckeditor.com/demo

Database

MWS will design and develop the relational database in order to accommodate all the requirements. Appropriate normal forms will be used.

Server

MWS will use the same server that is currently hosting the CCTAM. The server will have unlimited storage and bandwidth provided the server is not used as a backup / storage drive, is not used to transmit unsolicited bulk / commercial email, and does not contain pornography or other banned / illegal material. Resources such as CPU, RAM can be scaled to match the needs of the CCTAM. All domain, development server and production server work will be handled by MWS as part of this proposal.