GOLES User Complaint System Product Overview

SI 631—Content Management Systems

Rebecca Carter

Nisha Erinjeri

David Hsiao

Cheng-Lun-Li

GOLES OVERVIEW REPORT

Executive Summary…… 1

Purpose…….. 2

Overview of the Site ……. 3

Explanation of the Site…….. 6

Section 1: Homepage…… 6

Section 2: Add Basic Information…… 7

Section 3: Submit Complaints…….. 10

Section 4: Reports…… 14

Section 5: Modifications…….. 22

Overview of Workflow…….. 25

Access Control Levels…….. 30

Beginners Overview of Modules…… 32

Recommendations……. 34

Appendices

Appendix A: Client Background……..……. 35

Appendix B: Client Requirements Analysis……..……. 36

Appendix C: Trajectory of the Site……..……. 44

Appendix D: Modules Explanation……..……. 47

Appendix E: Modules Personas and Scenarios……. 52

EXECUTIVE SUMMARY

Good Old Lower East Side (GOLES) is a tenant's rights organization serving a large swath of historic Manhattan. Our project created a tool to improve information management at GOLES by bringing together the Content Management System Drupal; the resources of Openflows, a web application consultancy dedicated to the use of open source software; and the studious efforts of our team of four information science Masters students.

Our team, with the assistance of Eric Goldhagen of Openflows, developed a Drupal-based tool that will help GOLES to organize tenant complaints and associated information by replacing their Microsoft Access database and paper records and providing enhanced reporting functionality.

The site's main functions in the current version are to:

- Make announcements to non-authenticated users, including a calendar module for displaying events.
- Allow coordinators to add basic essential information, such as Landlord details, building details, and tenants information.
- Allow coordinators to submit complains and reports to the site, such as intake forms, heating and hot water issues, and court disputes
- Allow coordinators to create reports by a variety of search variables, such issues by building, complaint intakes, and electricity issues.
- Allow coordinators to administer basic functions, such as adding a new user accounts and new fields.

While the site is currently designed for the support of the work of Coordinators at GOLES, the site is expandable to include the following levels of users:

- Anonymous User
- Authorized User/Tenant
- Tenant Association Coordinator
- GOLES Coordinator
- GOLES Administrator

We anticipate and recommend the following future scenario:

- The tool will be implemented first by the GOLES coordinators.
- Within a few months GOLES coordinators will begin use it as a platform for communication with clients, replacing their current informational site.
- Improvements to CiviCRM will allow the tool to be expanded to include service directly to tenants.
- Tenants and tenant association coordinators will eventually be able to add new information to the system.

PURPOSE

The GOLES Tenant Complaint System is a Drupal-based system that incorporates all the current paper-based forms into an electronic, searchable database that can be extended to include increased report functionality and tenant-facing features so that eventually the system can support all of GOLES' functions.

GOLES has handled all the requests for help, training, mediation and their various services primarily through an outdated paper-based system, aided by a Filemaker Pro database. They also use emails for long-term storage for internal communication, but it is hard for them to track the documents using just an e-mail client.

The system we developed greatly aids organization across and between the TAs served by GOLES. It will do this by enhancing the ability to identify unifying themes; such as shared issues between TAs and common property owners which to organize around. This new system will provide GOLES with the ability to see a larger snapshot of activities.

The system will also help GOLES in archiving the documents for ease of retrieval. The features of the new system support most of the work that GOLES performs, as the majority of tasks at GOLES are intended to assist tenants in their relations with landlords, involving organization and delivery of important information. In addition to providing all these efficiencies, the tool will provide exponential improvements for reports to not only gage current progress, but also to show funders and the agencies to which they are contracted a quantified account of their contributions to the community.

While the initial categorization scheme may be fairly limited -- focusing on landlord-tenant disputes and requests for services -- as the adoption of the site grows, further categories may be deemed useful for reporting and service purposes. When these are identified, they can be easily added to the existing scheme.

The GOLES tenant complaint system additionally satisfies a years-long personal goal for Eric Goldhagen of Openflows: to give something back to a community organization that has helped him in the past. On a larger scale, the purpose of the project is to provide a prototype for a process by which similar organizations can create comparable tools that will greatly enhance their ability to serve their populations, giving enhanced meaning to this project.

OVERVIEW OF THE SITE

The GOLES Tenant Complaint System is a Drupal-based system that incorporates all the current paper-based forms into an electronic, searchable database that can be extended to include increased report functionality and, pending CiviCRM developments, tenant-facing features so that eventually the system can support all of GOLES' functions.

The site's main functions in the current version are to:

- Make announcements to non-authenticated users, including a calendar module for displaying events.
- Allow coordinators to add basic essential information, such as Landlord details, building details, and tenants information.
- Allow coordinators to submit complains and reports to the site, such as intake forms, heating and hot water issues, and court disputes
- Allow coordinators to create reports by a variety of search variables, such issues by building, complaint intakes, and electricity issues.
- Allow coordinators to administer basic functions, such as adding a new user accounts and new fields.

The landing page of the site serves the purpose of making announcements to non-authenticated users, essentially duplicating the publishing purpose of the current GOLES website. If the coordinators so desire, our tool can now substitute for this purpose.

From the landing page, GOLES coordinators (and, in the future, tenants and tenant association coordinators) can log in to access the GOLES Complaint System.

The five groups of information accessible from this page are as categorized as:

Add Basic Information
These areas are to enter all the basic details of Landlords, buildings, and tenants.

- Add New Landlord
- Add New Building
- Add New Tenant
- Create a New User Account

Add Complaint
This page is for entering all complaint-related issues, after the basic information has been added.

- Basic Intake form

    - *This form is the intake form that GOLES coordinators will fill out on a tenant's initial visit to their office.*
- Heating Issues
    - *This form is for reporting heating issues to GOLES*
- Hot Water Issues
    - *This form is for reporting hot water issues to GOLES.*
- Electricity Issues
    - *This form is for reporting electricity issues to GOLES.*
- Apartment Inspections
    - *This form is for entering information on any inspections that have been done in your apartment or building.*
- Apartment Repair
    - *This is a form for submitting information about repair requests to GOLES.*
- Court Dispute
    - *This form is for reporting upcoming court hearings to GOLES.*

GOLES Coordinator Reports
This page aggregates all report types anticipated as useful for current GOLES report needs. Report Types can be added by an administrator as needs change.

- View List of Landlords
    - This page contains a list of all landlords in the database.
- View List of Buildings
    - This page contains a list of all buildings that can be filtered by landlord.
- View List of Tenants
    - This page contains a list of tenants that can be filtered by landlord and/or building.
- View All Submissions
    - View all types of submissions including complaints, court hearings, and repair/inspection reports. The result can filtered by either building and/or landlord.
- View All Complaints
    - View all types of complaints/issues. The result can filtered by either building and/or landlord.
- View Complaint Intakes
    - This page lists all complaint intake form submitted. The result can be filtered by submit date and building and/or landlord.
- View Building-wide Issues
    - This is a page to view complaints intake form with specific building-wide (public area) issues. Staff can

filter complaint intake forms by specific public area issue.

- View Electricity Issues
  - This page contains all electricity issue complaints. Result can be filtered by submit date and building and/or landlord.
- View Heating Issues
  - This page contains all heating issue complaints. Result can be filtered by submit date and building and/or landlord.
- View Hot Water Issues
  - This page contains all hot water issue complaints. Result can be filtered by submit date and building and/or landlord.
- View all repair reports
  - This page shows all inspection reports.
- View of all inspection reports
  - This page shows all inspection reports.
- Calendar of Complaints
  - A calendar view of all complaints submitted or updated.
- Court Hearings
  - View all court hearings.
- Calendar of court hearings
  - This page shows calendar view of all court hearings.

Modify Site
This page contains the basic administrative functions available to coordinators. For more in depth changes, a site administrator should be contacted authenticated users can:

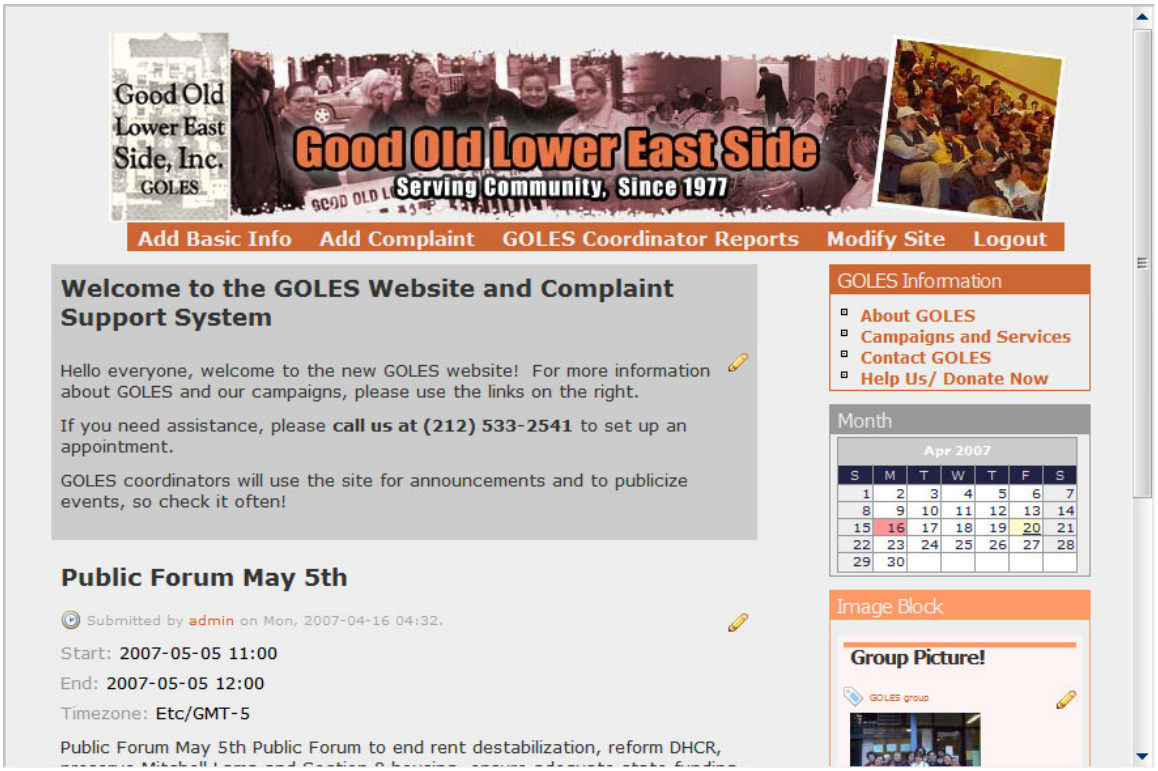
- Add a New Announcement
  - Add new announcements to appear on the front page.
- Add a New Event
  - Add new events to appear on the front page.
- Make Changes to Forms or Fields
  - Modify the forms for intake or entering issues.

Log out
This link, as its title implies, logs users from the site.

EXPLANATION OF THE SITE

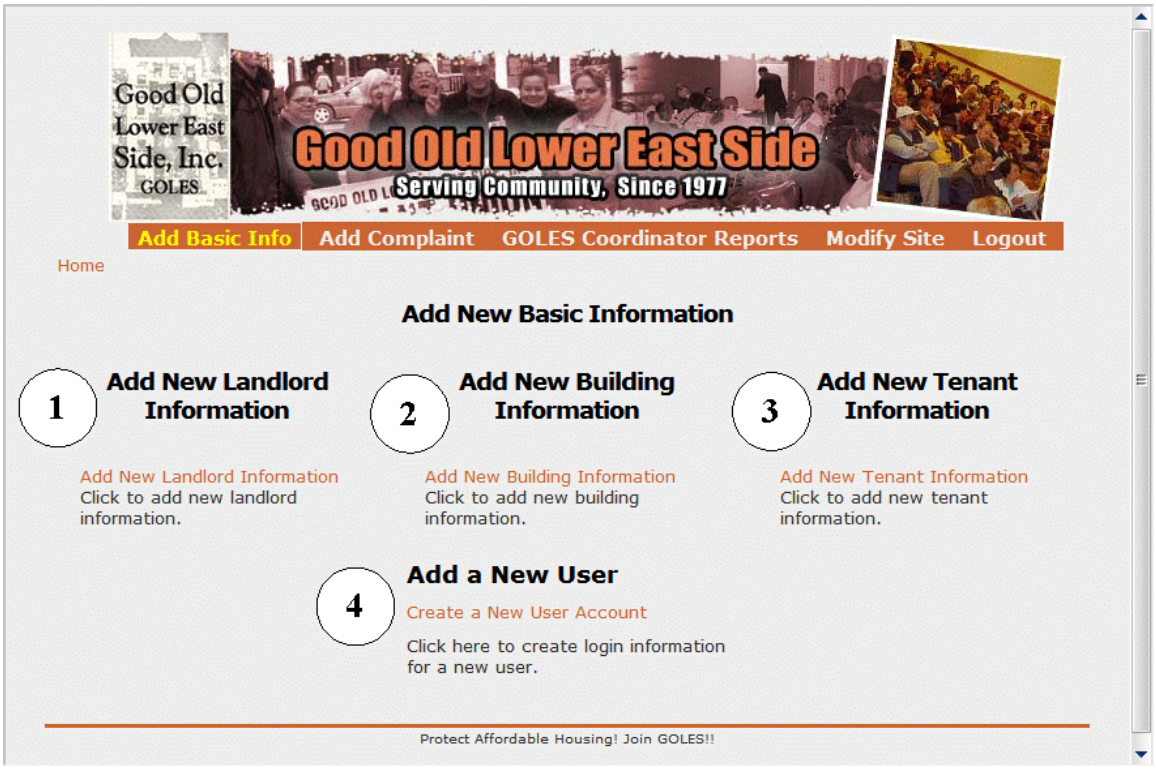
SECTION 1: Homepage

While serving as a log in page, the home page doubles as a convenient spot for announcements and events. In the pilot, coordinators-only version of the site, it can be used for internal communications, like an intranet. But in the future this page could act as the landing page for all visitors to the public-facing website, including tenants and non-authenticated users, thereby substituting for all functions of the current public website.

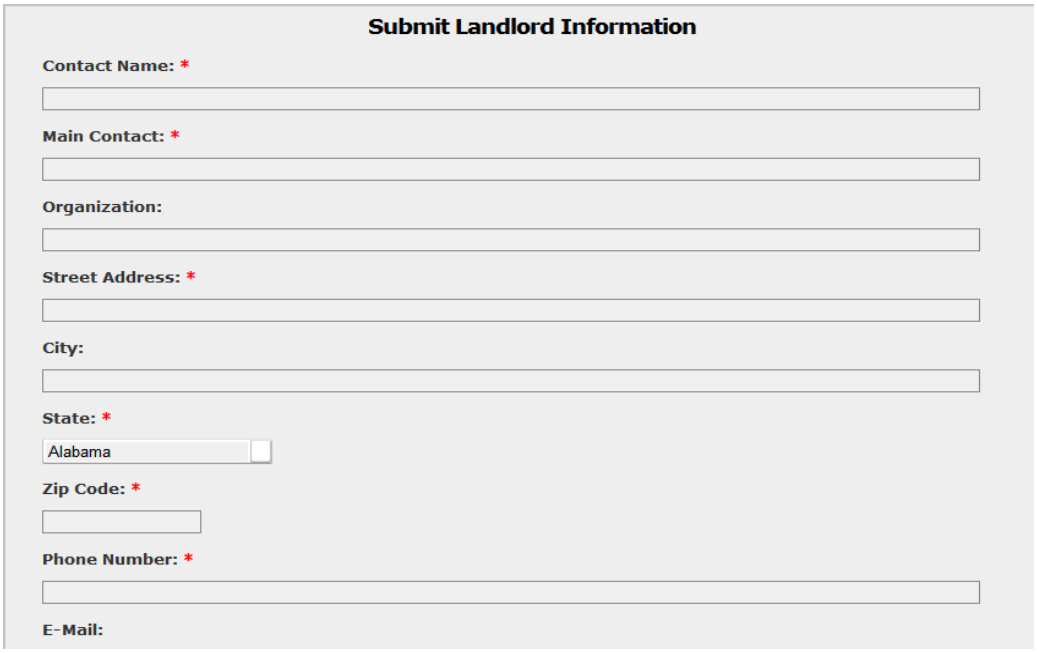


SECTION 2: Add Basic Information

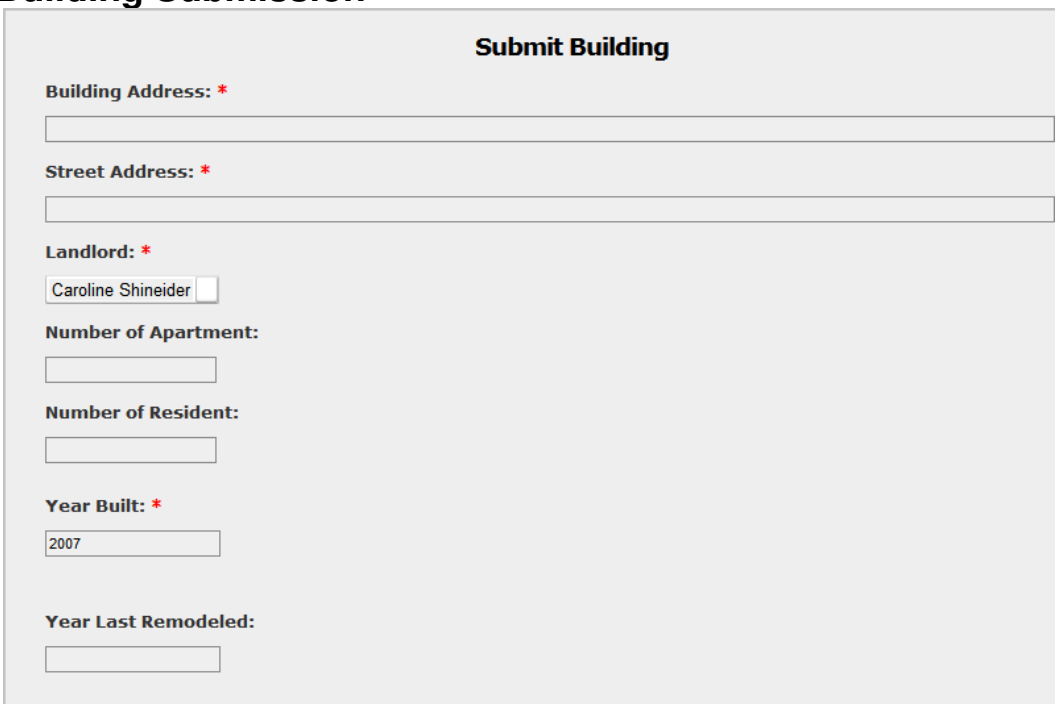
After logging in from the landing page, users will add basic information from this page, which provides access to the following four forms:



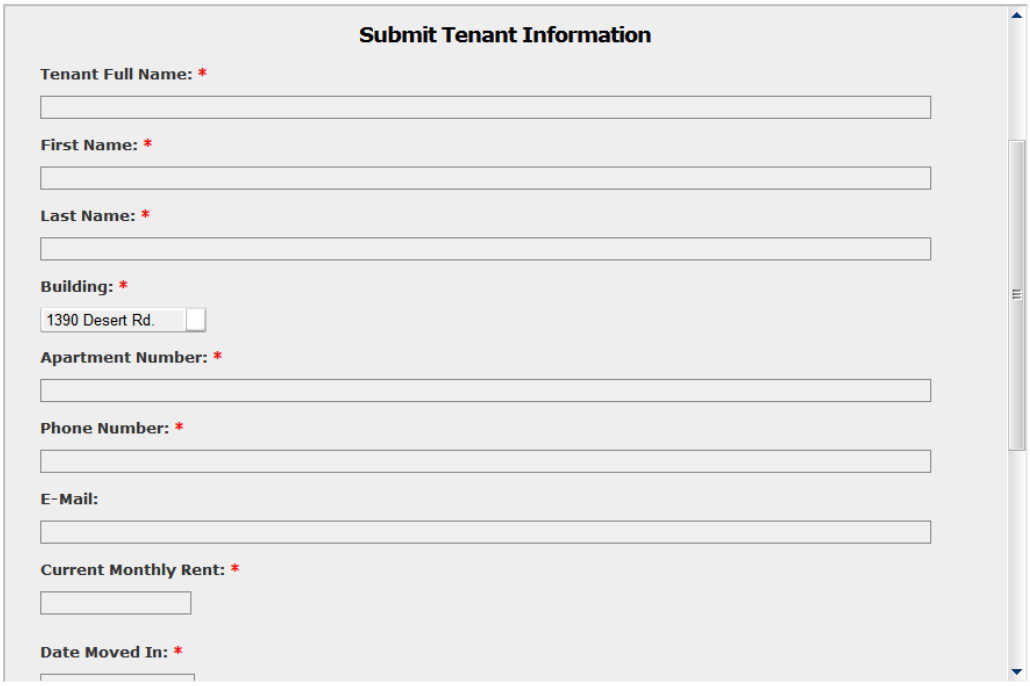
1. Landlord Submission



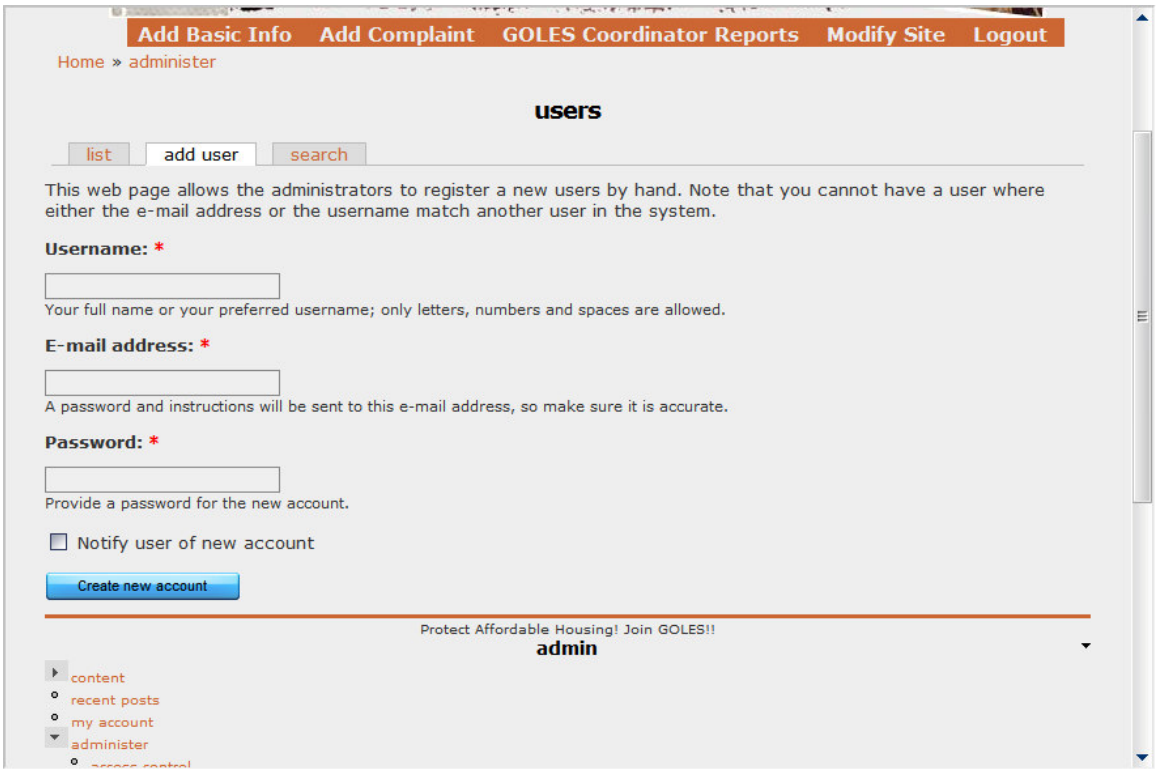
2. Building Submission



3. Tenant Submission

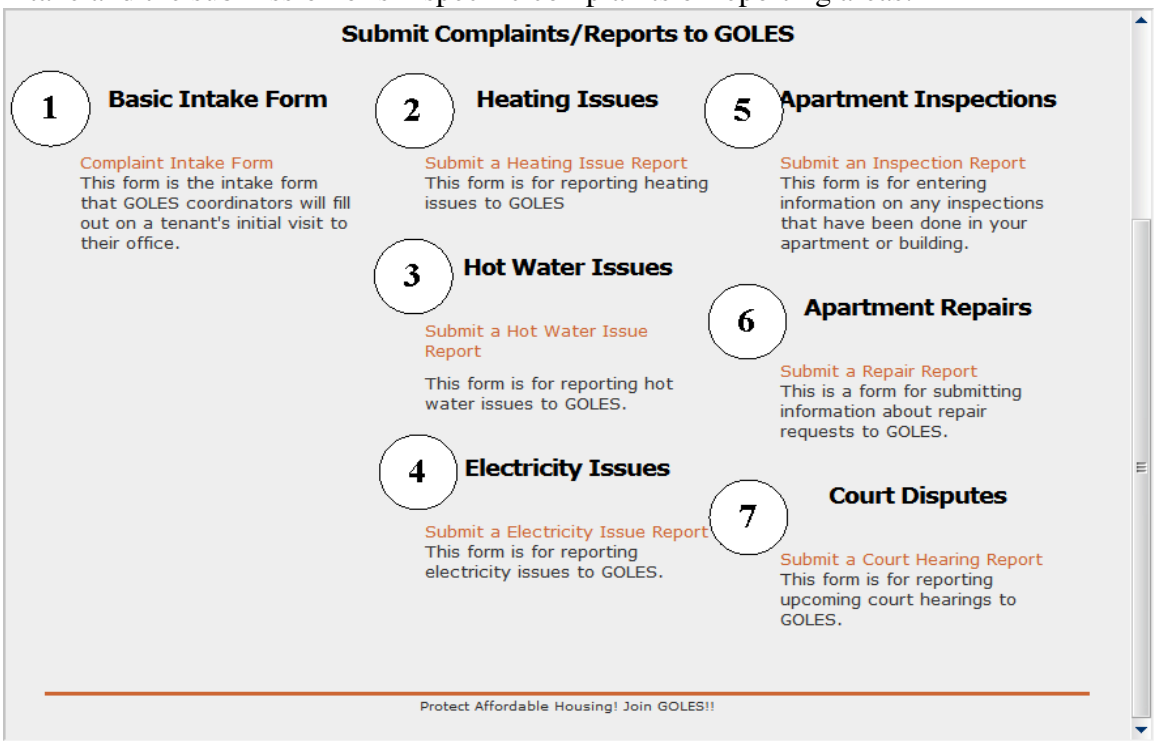


4. Add New Users

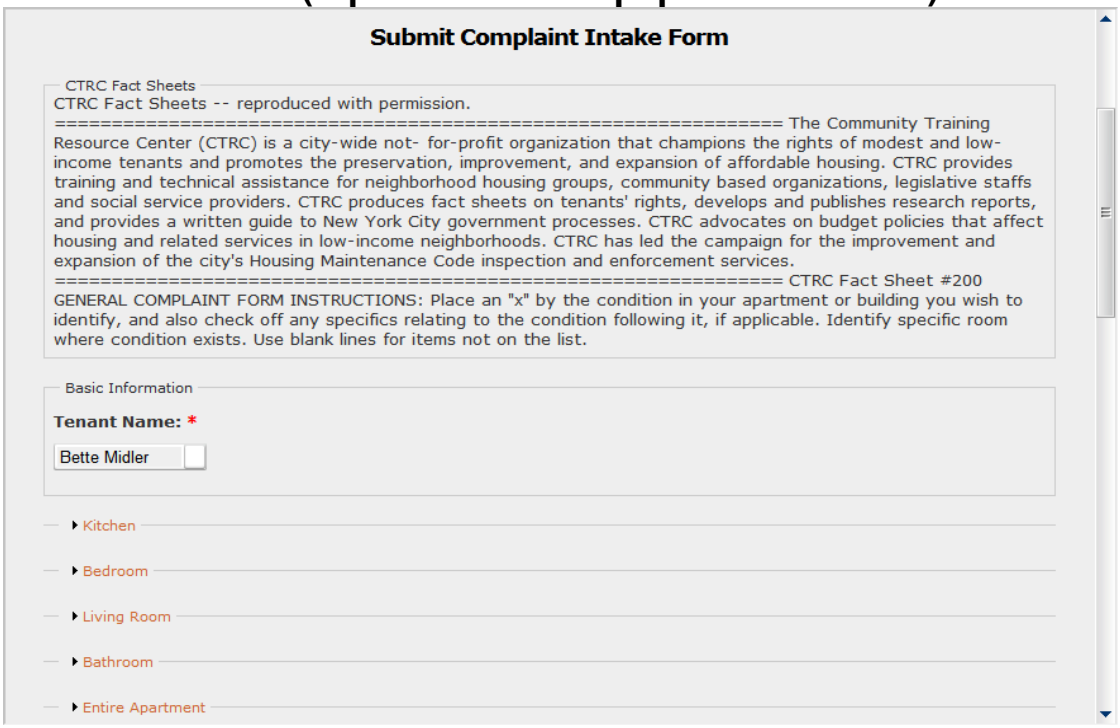


SECTION 3: Submit Complaints

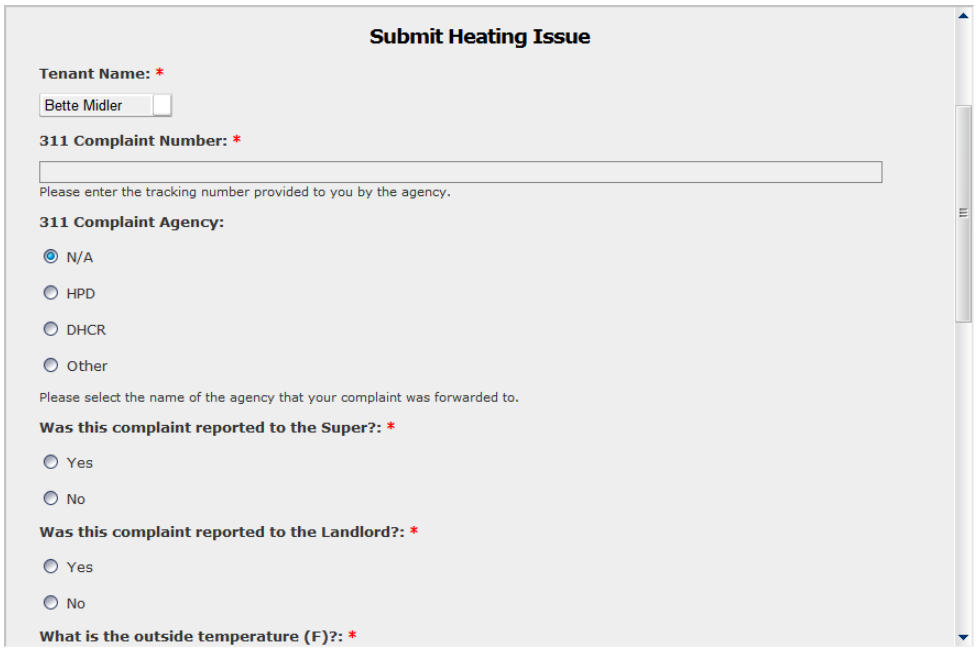
Once all information for buildings, Landlords, and tenants has been entered in to the database into the system, the "submit complaint" area leads users to forms for general intake and the submission of six specific complaints or reporting areas:



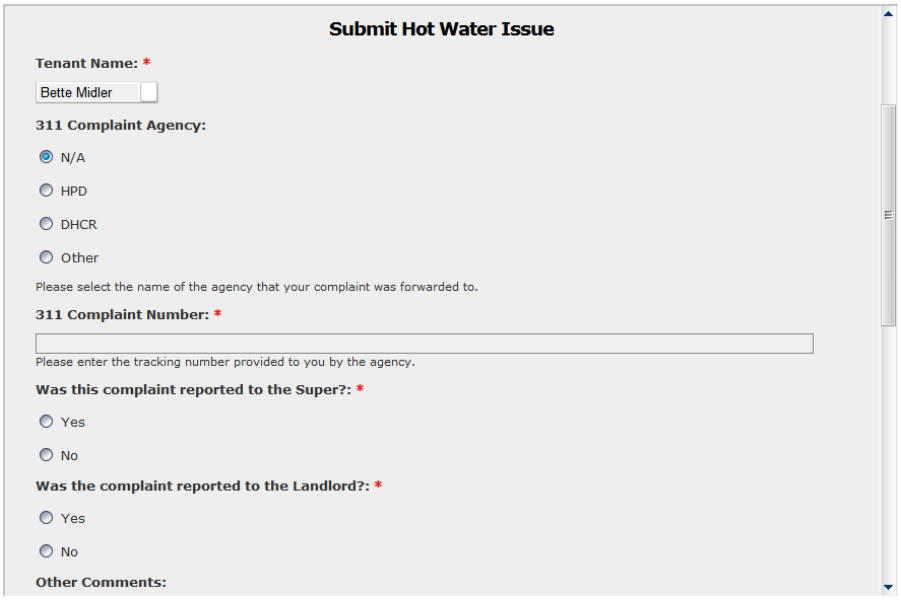
1. Submit Intake (replaces current paper intake form)



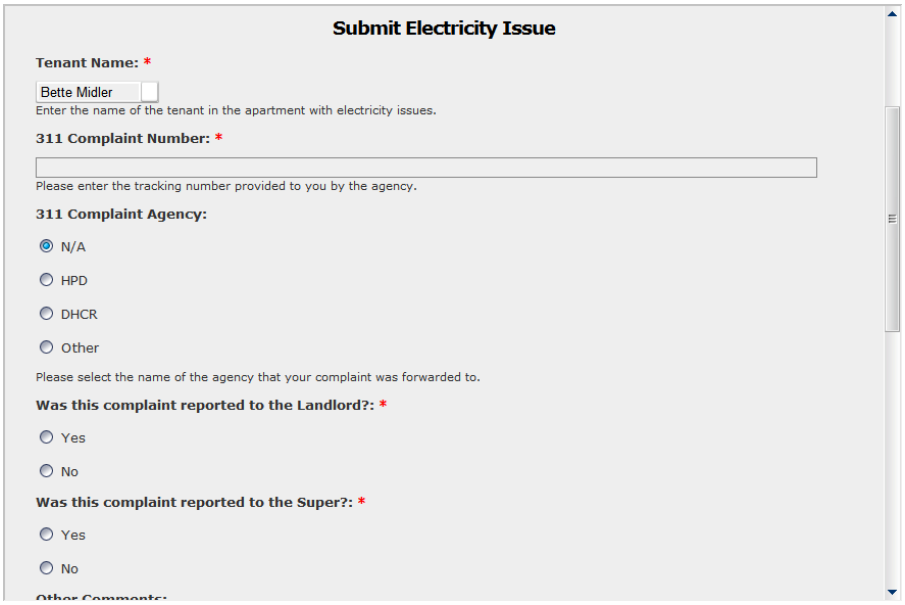
2. Submit Heating Issues



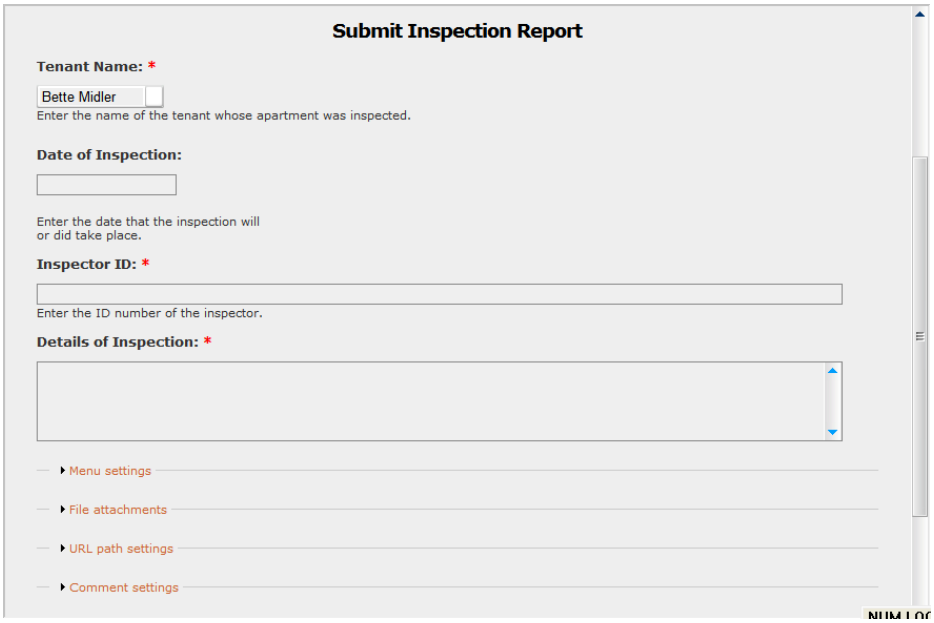
3. Submit Hot Water Issues



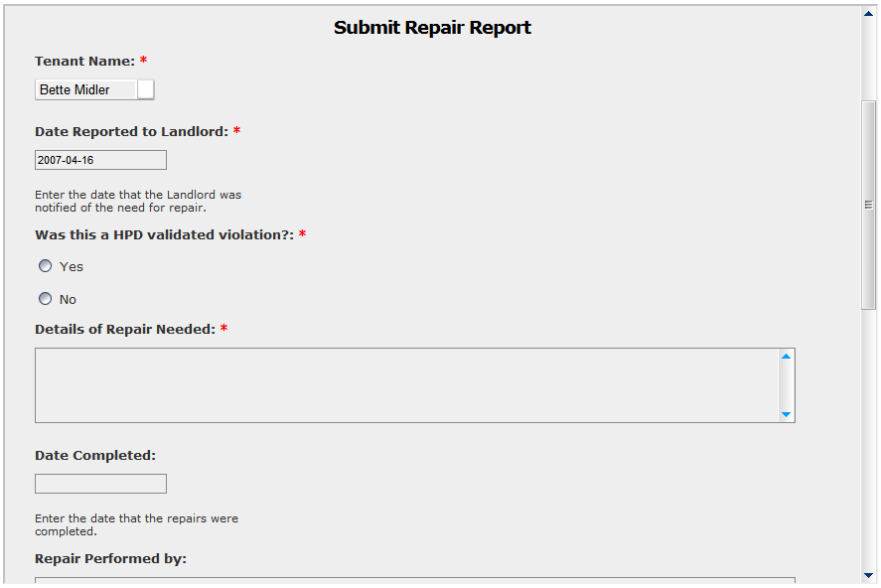
4. Submit Electricity Issues



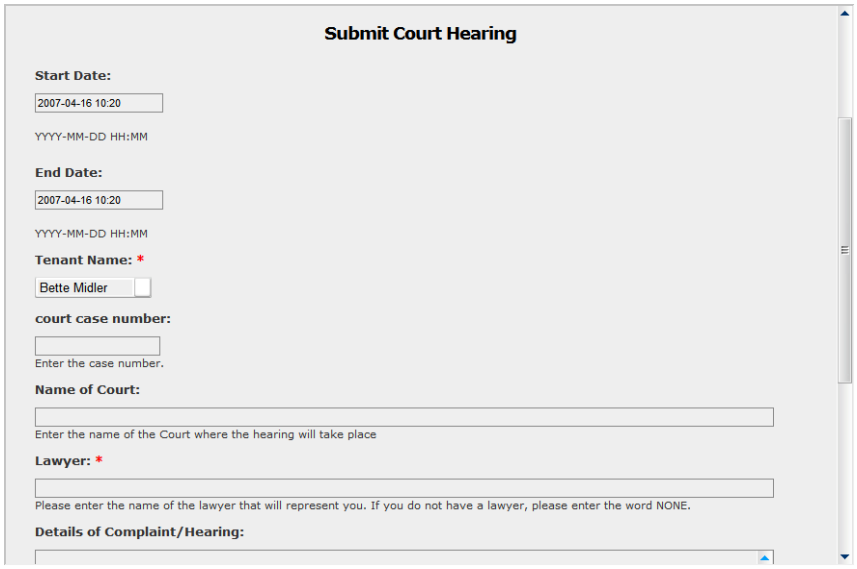
5. Submit Inspection Report



6. Submit Repair Report

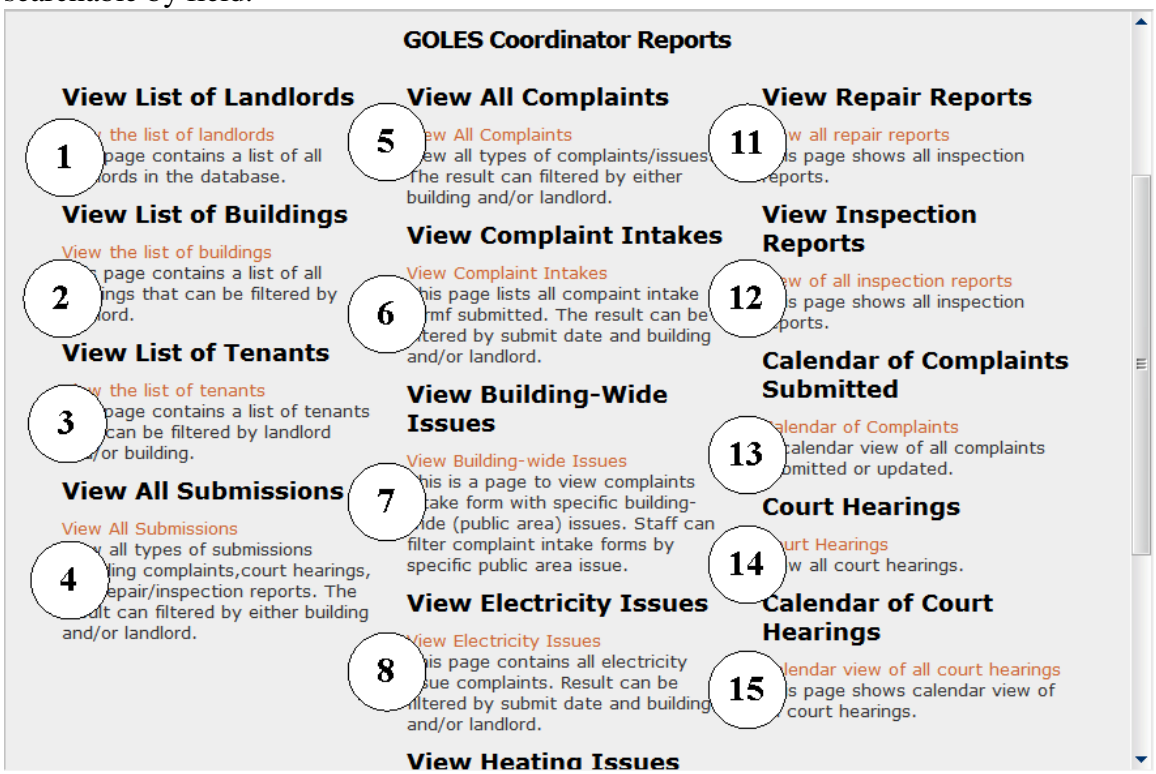


7. Submit Court Record

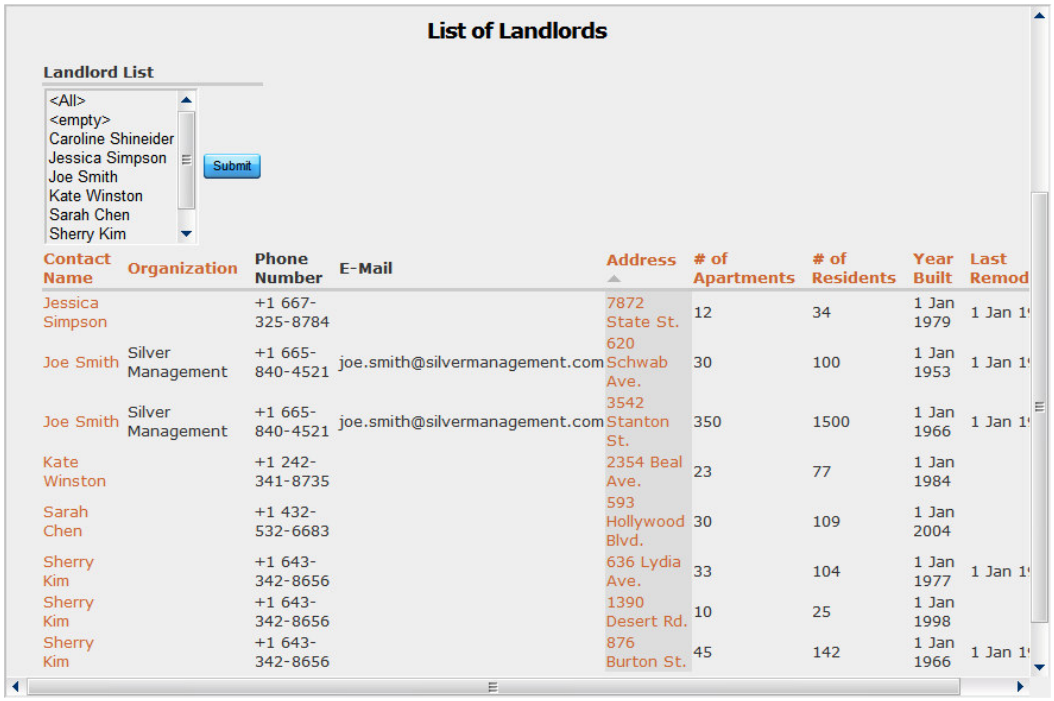


SECTION 4: Reports

The Coordinator Reports sections contains links to a variety of reporting options, searchable by field.



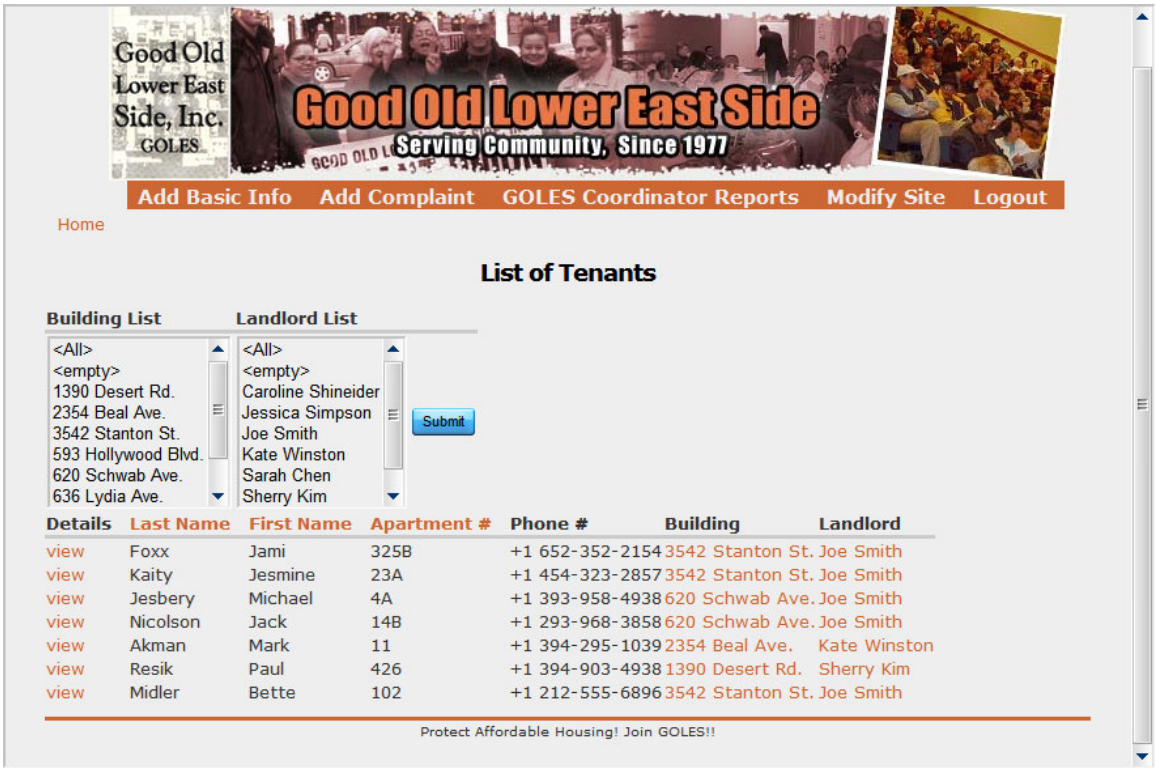
1. List of Landlords



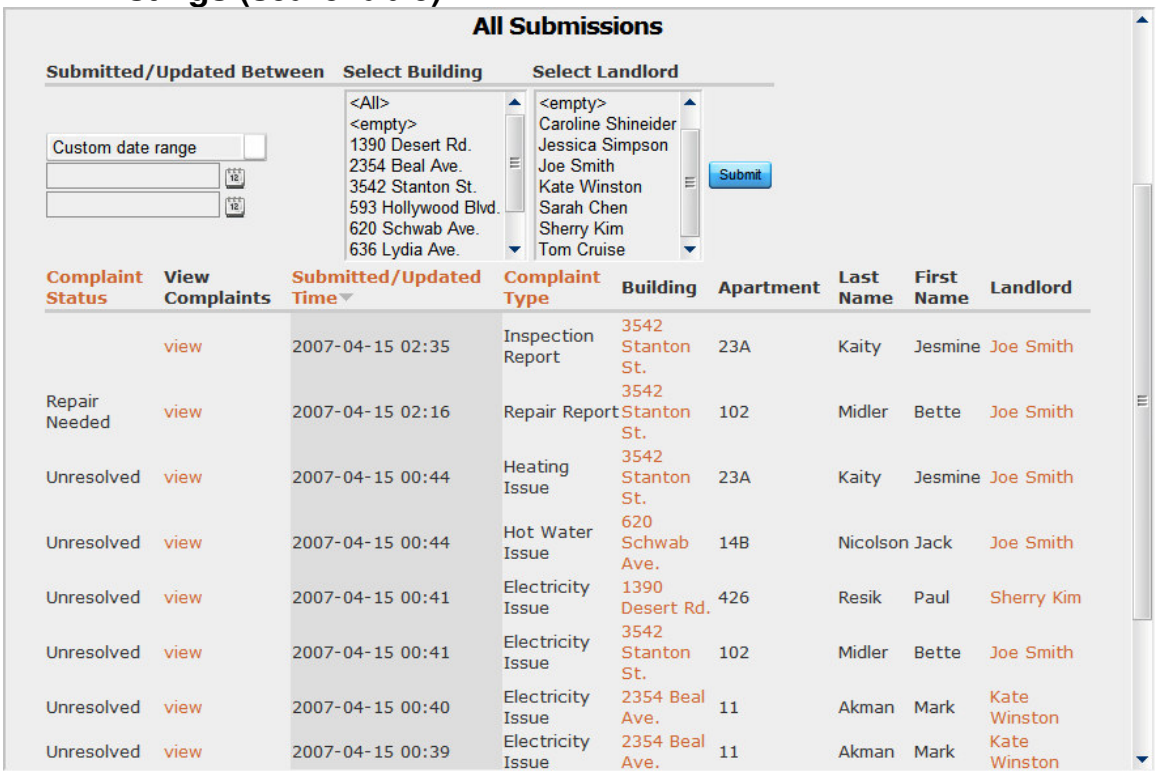
Contact Name	Organization	Phone Number	E-Mail	Address	# of Apartments	# of Residents	Year Built	Last Remod
Jessica Simpson		+1 667-325-8784		7872 State St.	12	34	1 Jan 1979	1 Jan 1
Joe Smith	Silver Management	+1 665-840-4521	joe.smith@silvermanagement.com	620 Schwab Ave.	30	100	1 Jan 1953	1 Jan 1
Joe Smith	Silver Management	+1 665-840-4521	joe.smith@silvermanagement.com	3542 Stanton St.	350	1500	1 Jan 1966	1 Jan 1
Kate Winston		+1 242-341-8735		2354 Beal Ave.	23	77	1 Jan 1984	
Sarah Chen		+1 432-532-6683		593 Hollywood Blvd.	30	109	1 Jan 2004	
Sherry Kim		+1 643-342-8656		636 Lydia Ave.	33	104	1 Jan 1977	1 Jan 1
Sherry Kim		+1 643-342-8656		1390 Desert Rd.	10	25	1 Jan 1998	
Sherry Kim		+1 643-342-8656		876 Burton St.	45	142	1 Jan 1966	1 Jan 1

2. List of Buildings

3. List of Tenants



4. All Listings (searchable)



All Submissions

Submitted/Updated Between: Custom date range

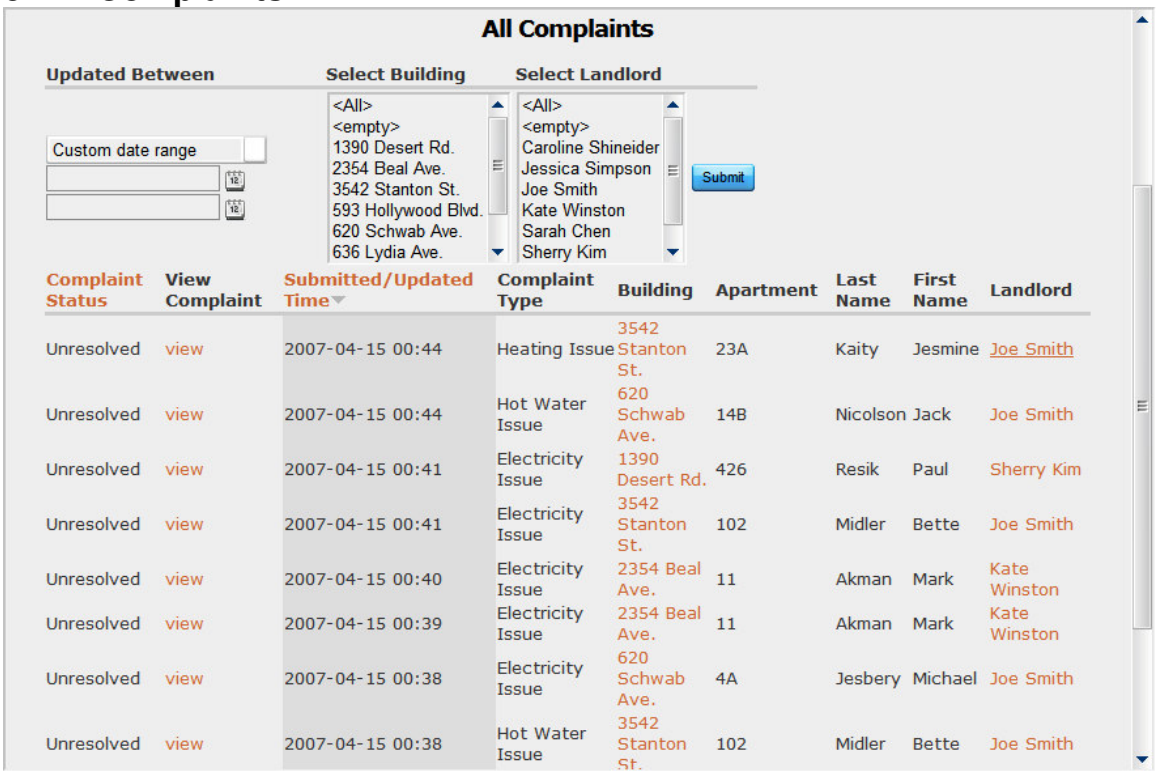
Select Building: <All>, <empty>, 1390 Desert Rd., 2354 Beal Ave., 3542 Stanton St., 593 Hollywood Blvd., 620 Schwab Ave., 636 Lydia Ave.

Select Landlord: <empty>, Caroline Shineider, Jessica Simpson, Joe Smith, Kate Winston, Sarah Chen, Sherry Kim, Tom Cruise

Submit

Complaint Status	View Complaints	Submitted/Updated Time	Complaint Type	Building	Apartment	Last Name	First Name	Landlord
	view	2007-04-15 02:35	Inspection Report	3542 Stanton St.	23A	Kaity	Jesmine	Joe Smith
Repair Needed	view	2007-04-15 02:16	Repair Report	3542 Stanton St.	102	Midler	Bette	Joe Smith
Unresolved	view	2007-04-15 00:44	Heating Issue	3542 Stanton St.	23A	Kaity	Jesmine	Joe Smith
Unresolved	view	2007-04-15 00:44	Hot Water Issue	620 Schwab Ave.	14B	Nicolson	Jack	Joe Smith
Unresolved	view	2007-04-15 00:41	Electricity Issue	1390 Desert Rd.	426	Resik	Paul	Sherry Kim
Unresolved	view	2007-04-15 00:41	Electricity Issue	3542 Stanton St.	102	Midler	Bette	Joe Smith
Unresolved	view	2007-04-15 00:40	Electricity Issue	2354 Beal Ave.	11	Akman	Mark	Kate Winston
Unresolved	view	2007-04-15 00:39	Electricity Issue	2354 Beal Ave.	11	Akman	Mark	Kate Winston

5. All Complaints



All Complaints

Updated Between: Custom date range

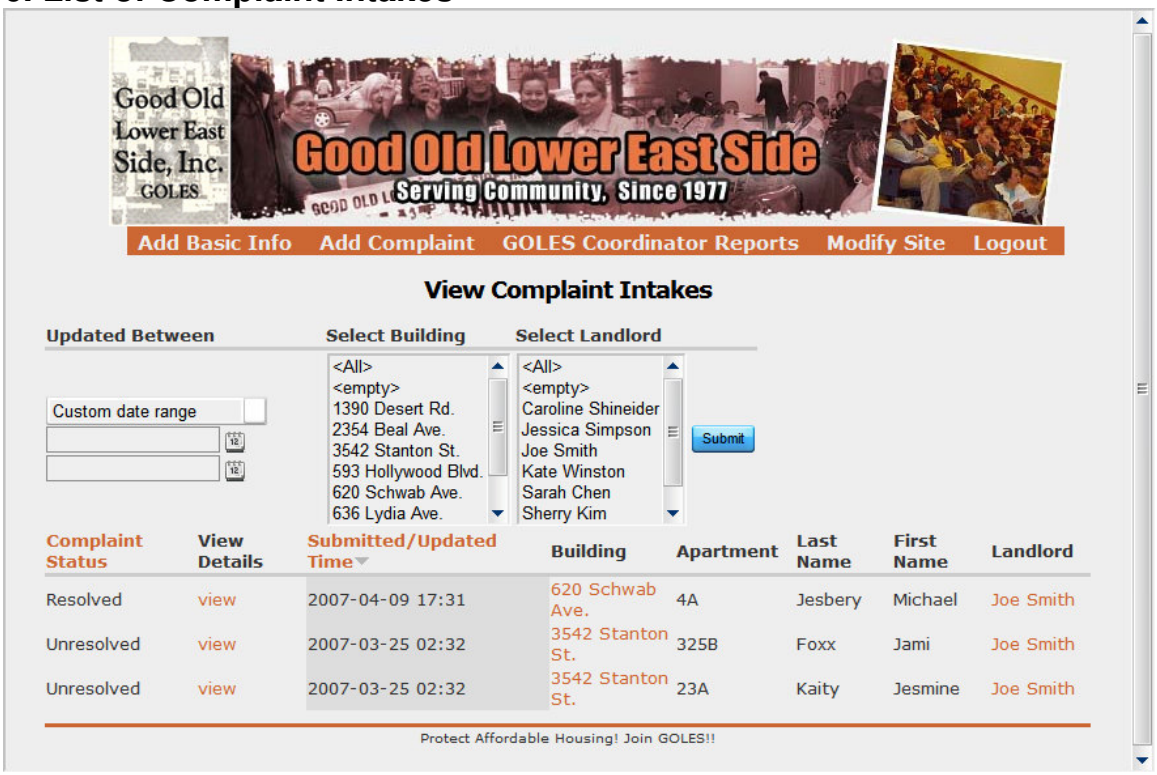
Select Building: <All>, <empty>, 1390 Desert Rd., 2354 Beal Ave., 3542 Stanton St., 593 Hollywood Blvd., 620 Schwab Ave., 636 Lydia Ave.

Select Landlord: <All>, <empty>, Caroline Shineider, Jessica Simpson, Joe Smith, Kate Winston, Sarah Chen, Sherry Kim

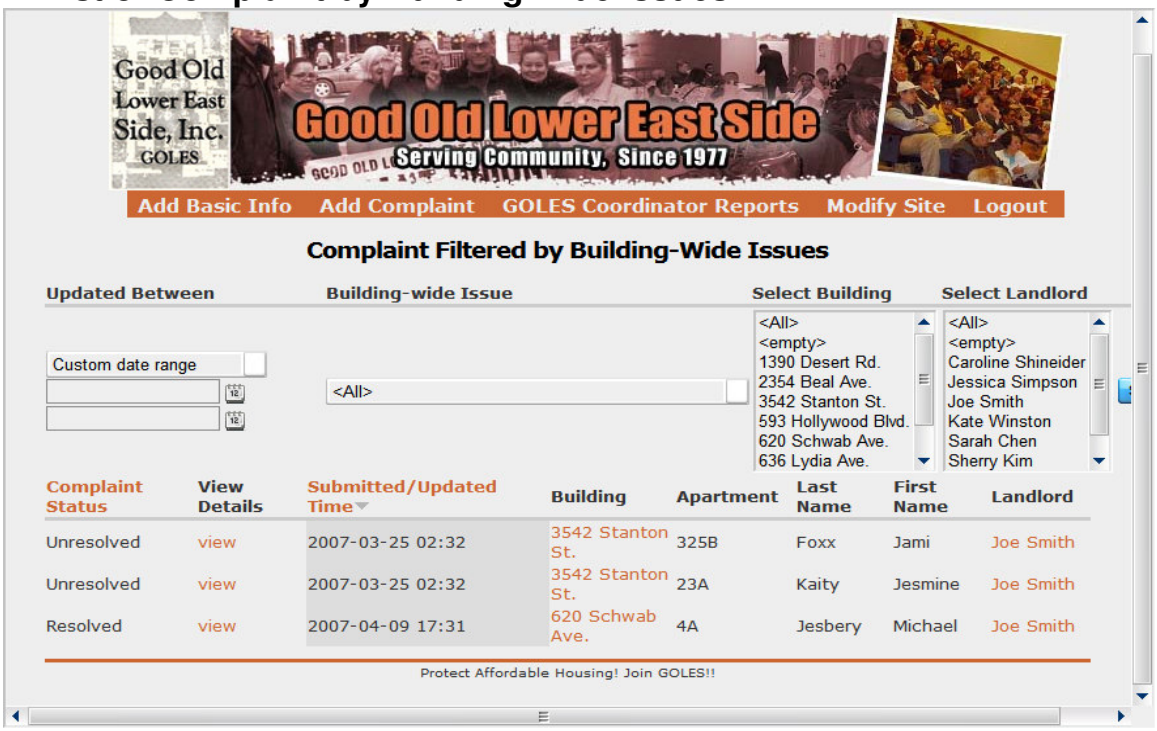
Submit

Complaint Status	View Complaint	Submitted/Updated Time	Complaint Type	Building	Apartment	Last Name	First Name	Landlord
Unresolved	view	2007-04-15 00:44	Heating Issue	3542 Stanton St.	23A	Kaity	Jesmine	Joe Smith
Unresolved	view	2007-04-15 00:44	Hot Water Issue	620 Schwab Ave.	14B	Nicolson	Jack	Joe Smith
Unresolved	view	2007-04-15 00:41	Electricity Issue	1390 Desert Rd.	426	Resik	Paul	Sherry Kim
Unresolved	view	2007-04-15 00:41	Electricity Issue	3542 Stanton St.	102	Midler	Bette	Joe Smith
Unresolved	view	2007-04-15 00:40	Electricity Issue	2354 Beal Ave.	11	Akman	Mark	Kate Winston
Unresolved	view	2007-04-15 00:39	Electricity Issue	2354 Beal Ave.	11	Akman	Mark	Kate Winston
Unresolved	view	2007-04-15 00:38	Electricity Issue	620 Schwab Ave.	4A	Jesbery	Michael	Joe Smith
Unresolved	view	2007-04-15 00:38	Hot Water Issue	3542 Stanton St.	102	Midler	Bette	Joe Smith

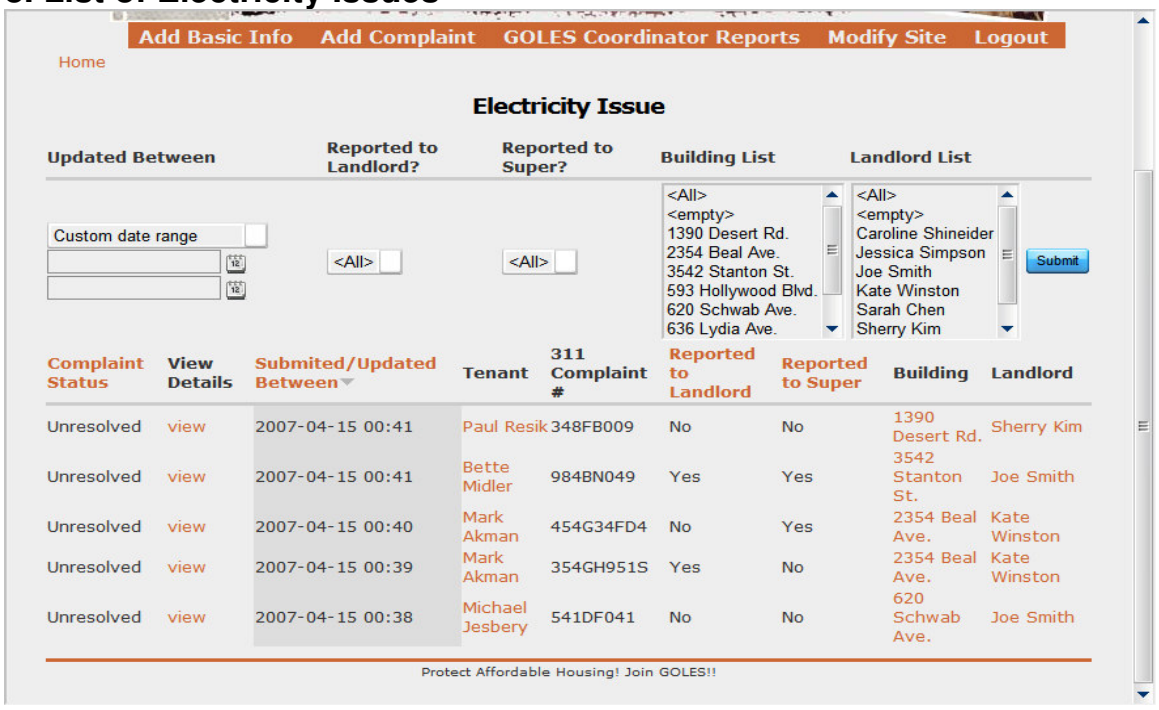
6. List of Complaint Intakes



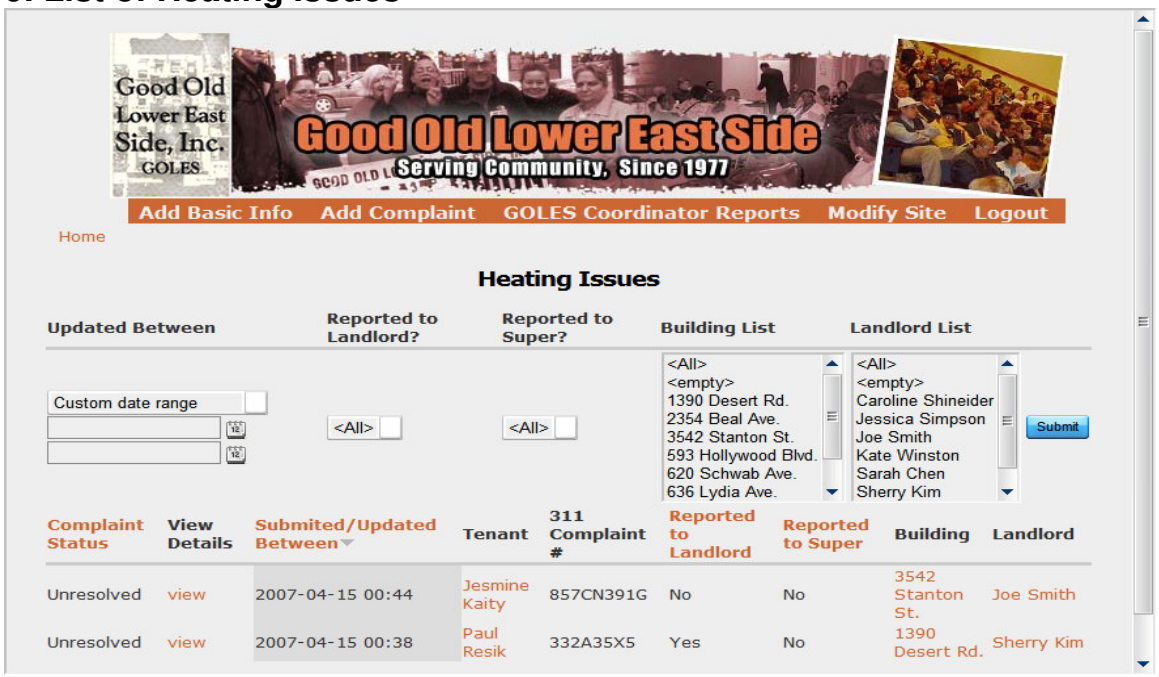
7. List of Complaint by Building-wide Issues



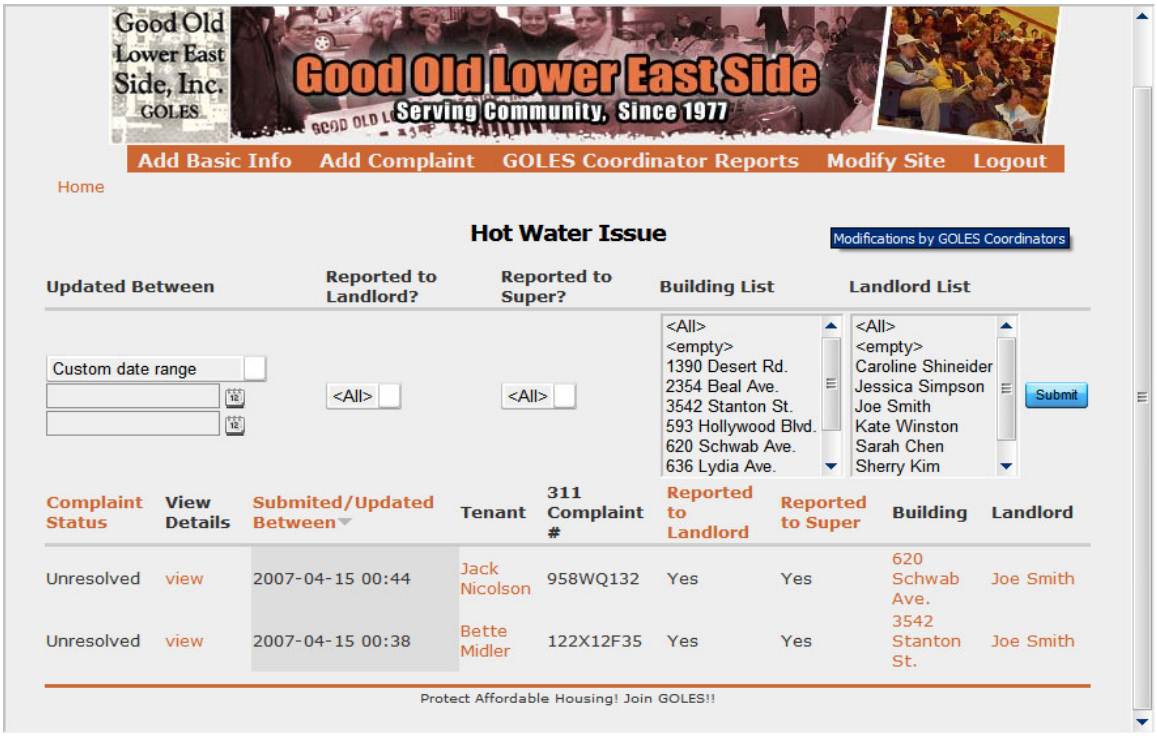
8. List of Electricity Issues



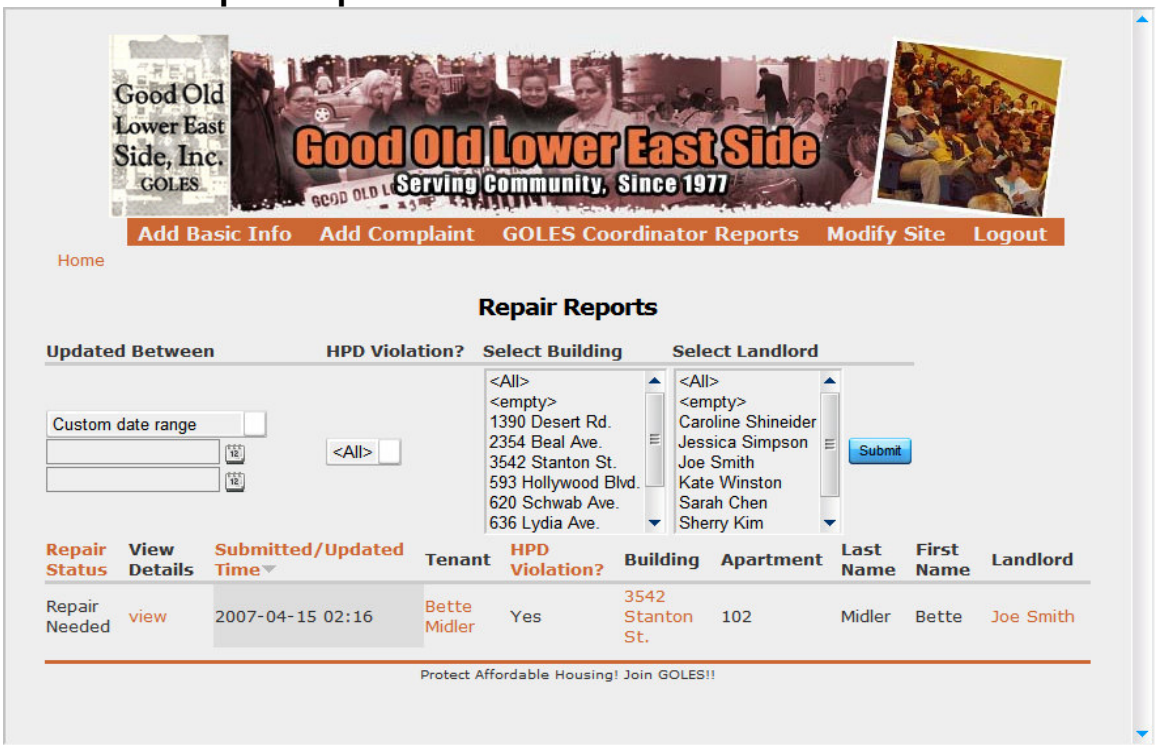
9. List of Heating Issues



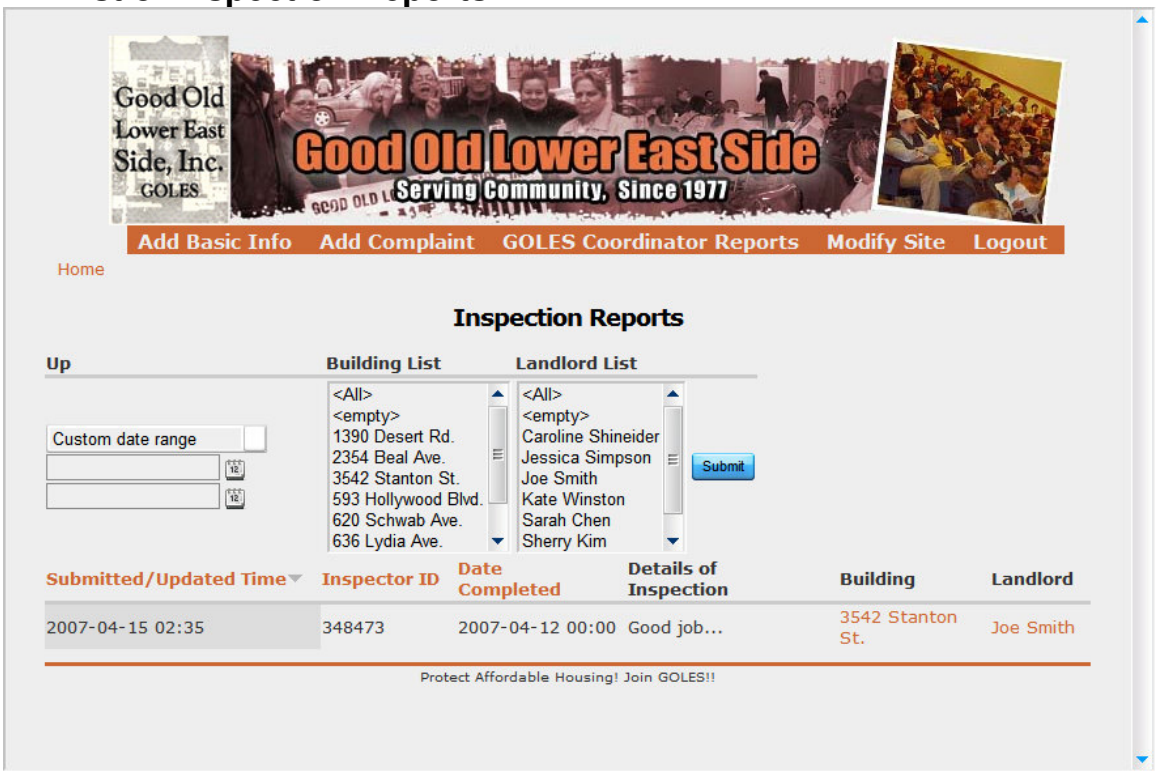
10. List of Hot Water Issues



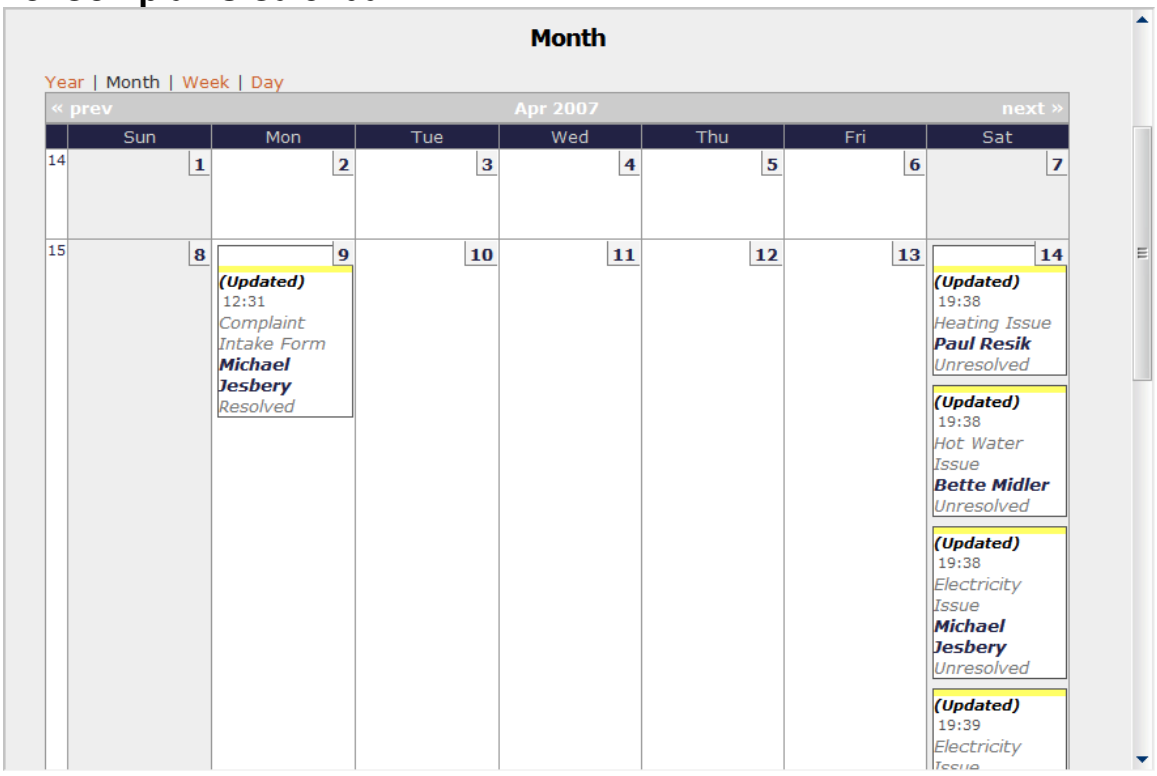
11. List of Repair Reports



12. List of Inspection Reports

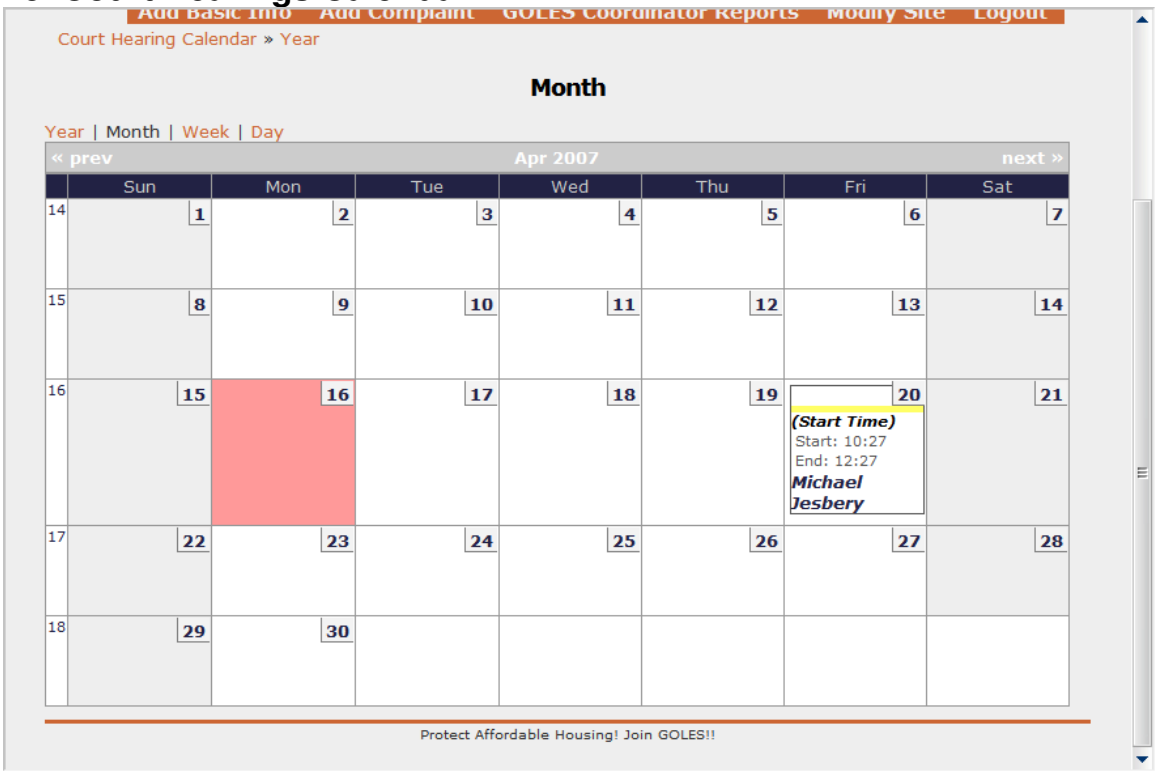


13. Complains Calendar



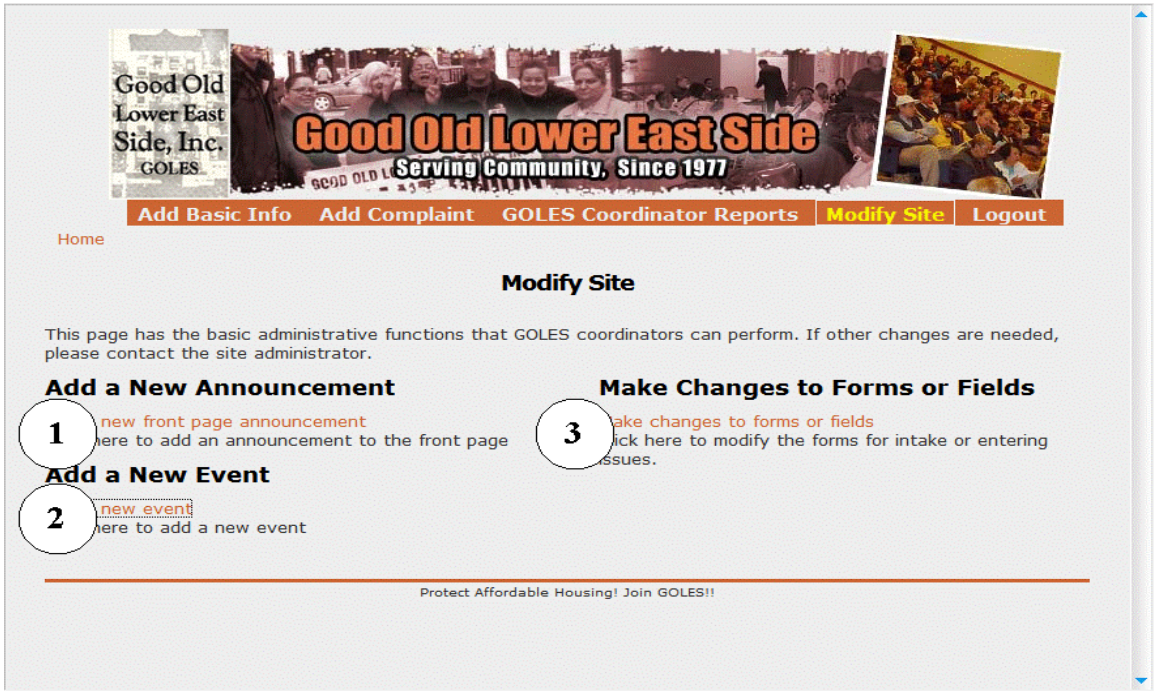
14. List of Court Hearings

15. Court Hearings Calendar



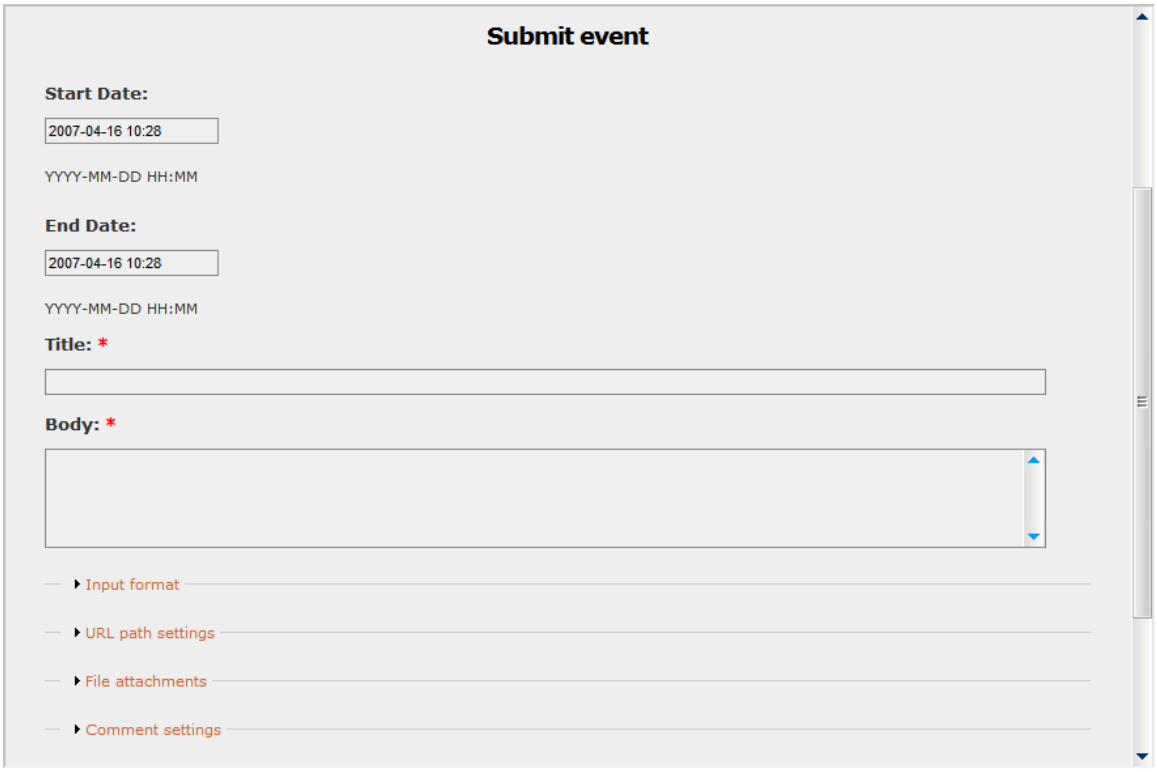
Section 5: Modifications

The Modifications page is a page intended for GOLES Coordinators to make basic modifications to the site. For more in depth modification, a systems administrator would be needed.

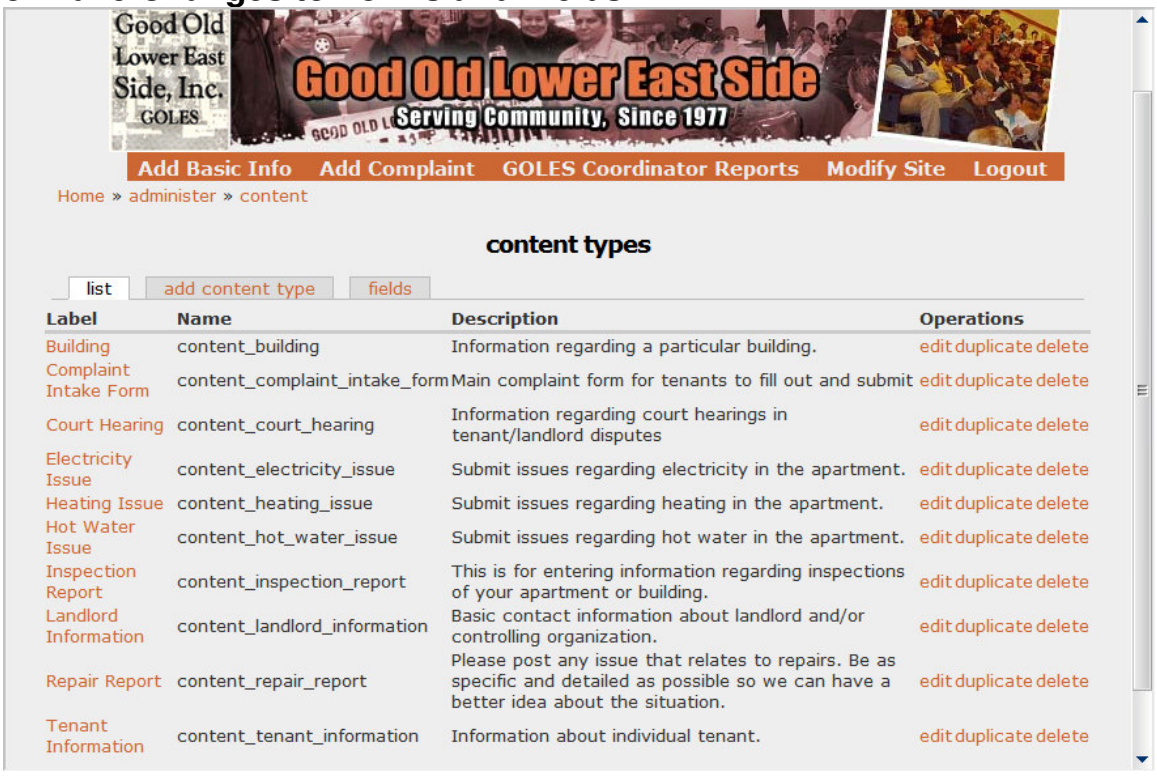


1. Add a New Announcement

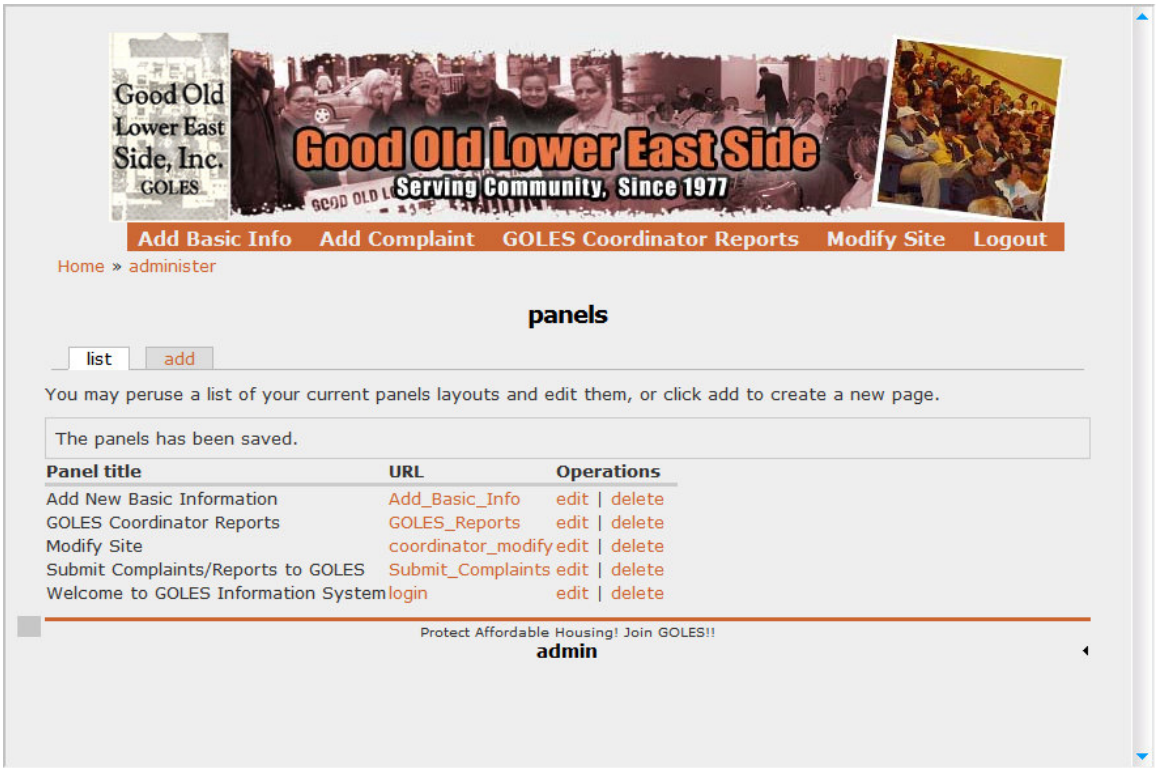
2. Add a New Event



3. Make Changes to Forms and Fields



3. Make Changes to Forms and Fields (continued)



OVERVIEW OF WORKFLOW PROCESS

This section outlines the basic levels of user access to site materials and functions based on their assigned role for the GOLES Tenant Complaint System. A more complete listing of permissions follows in Table 1. The different roles are as follows:

- Anonymous User
- Authorized User/Tenant
- Tenant Association Coordinator
- GOLES Coordinator
- GOLES Administrator

Anonymous User

Initially, the site will be controlled access, meaning that only users that have been authorized by GOLES will be given access. During this initial phase, GOLES coordinators will refer users to the site once they have completed an in-person intake. Also, it is important that all users contributing content to the site register, so that GOLES can appropriately follow up with them as necessary. Eventually, once the site has been fully integrated, anonymous users will be able to create their own accounts and complete the basic intake themselves. Notification would then be sent to GOLES for follow up.

Anonymous Users will initially have:

- Read Access to any GOLES posted materials
- The ability to send a note to GOLES staff through the contact form

Anonymous User will not have:

- Access to submitting complaints
- Access to Complaint Records
- Access to any of the administrative controls.

Authorized User/ Tenant

Authorized users will have access to all of the features that Anonymous Users have access to. In addition, they will be able to submit complaints to their own individual complaint records. These users will have the ability to post building-wide information to the other tenants in their building as well.

Authorized Users/Tenants will have:

- Read Access to any GOLES posted materials
- Read Access to “From Your TA” postings
- Access to submitting complaints
- Access to their Personal Complaint Record

- Access to any publicly shared “Building-wide issues”

Authorized Users/Tenants will not have:

- Access to any records other than their own.
- Access to any of the administrative controls

Tenant Association Coordinator:

In addition to all of the access available to Authorized Users/Tenants, Tenant Association Coordinators will have more administrative-level access to building-specific postings and sections of the site, in order to make this section of the site more tailored to the building in question. Tenant Association Coordinators will also have access to enter complaints and intake forms on behalf of their tenants. This will create a record of the complaint under the Tenant’s name. At the same time, they will not have administrative access to all of the features of the site.

Tenant Association Coordinators will have:

- Read Access to any GOLES posted materials
- Access to submit initial intake form
- Access to submitting complaints to complaint record
- Access to edit complaint record

Tenant Association Coordinators will not have:

- Write or edit access to GOLES content
- Access to editing forms or fields
- Access to any of the Administrative Controls for the site.

GOLES Volunteers/Coordinators

GOLES volunteers are the front-line for the organization, and will spend the most time interacting with clients and taking complaints. Therefore, the GOLES volunteers will have all of the access granted to Tenant Association coordinators, as well as some of the administrative functions related directly to their work for GOLES. It is currently unclear whether these volunteers will be addressing complaints. They will be given access to related features accordingly. GOLES volunteers will not have access to site administration features.

GOLES volunteers/coordinators will have:

- Read Access to any GOLES posted materials
- Read/Write/Edit Access to GOLES content
- Access to initial intake form
- Access to submitting complaints to complaint records

- Read/Edit Access to tenant complaints
- Ability to track complaints across many categories.

GOLES volunteers/coordinators will not have:

- Access to administrative functions other than those listed above

GOLES Administrators

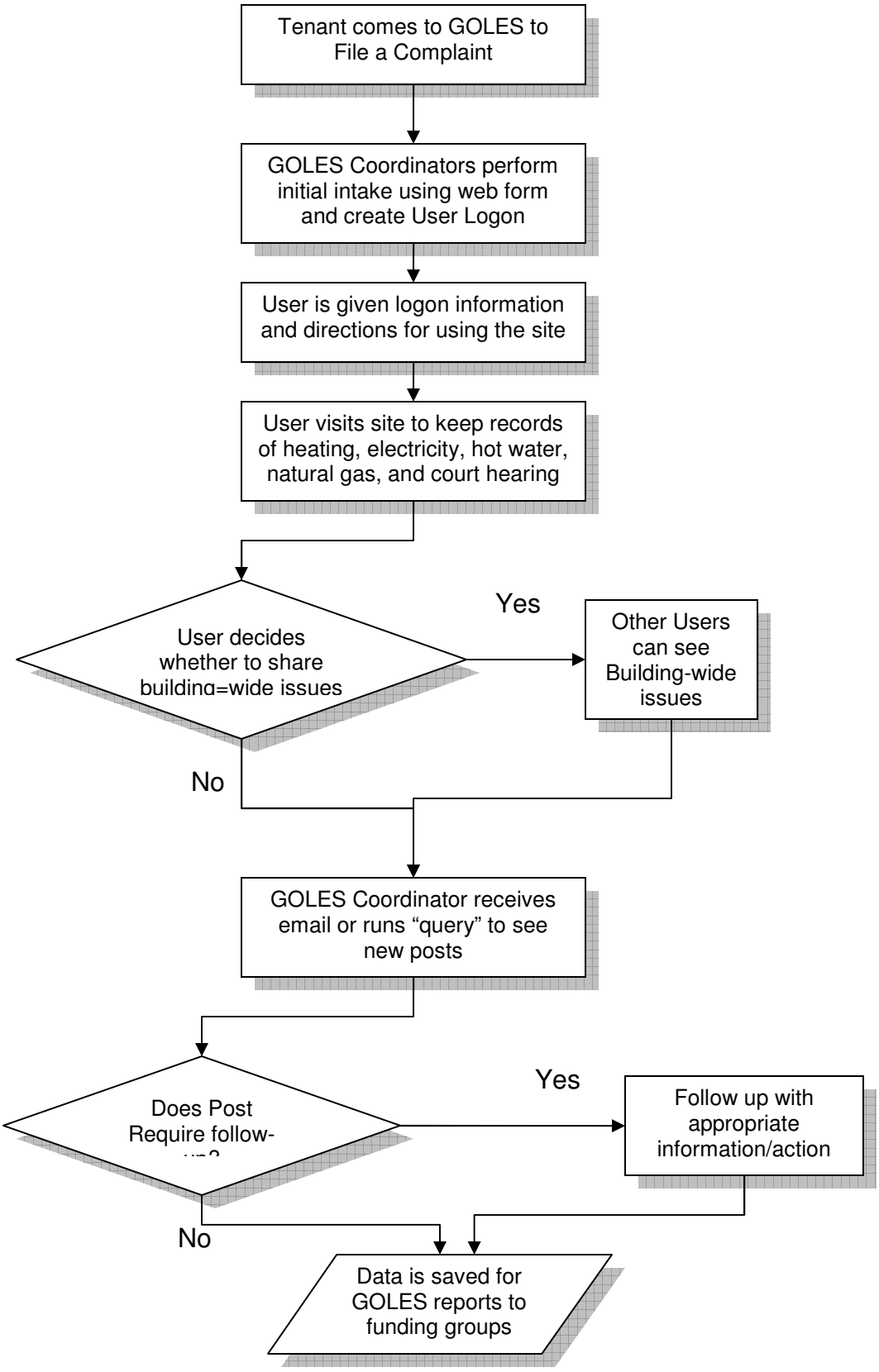
GOLES Administrators handle the site once it has transitioned to their ownership. As a result, they will have access to all site features, including resolving complaints.

Workflow Considerations

Initially, the workflow for site entry will be as follows. Tenants who visit GOLES and perform the initial intake will be given a logon to the site. These tenants will then be able to enter their landlord contact records directly into the site. GOLES coordinators and administrators will then be able to use the CiviCRM functionalities to see all new records and follow up with the tenant as necessary. See Figure 1.1 for an example.

Once the site has become fully integrated and functional, the workflow will likely change to a situation where the user can use the site to initiate their relationship with GOLES. Under this assumption, registration will be open, and the user will either be introduced to the site by a GOLES coordinator during an initial visit, or find the site and perform their initial intake as a precursor to meeting with GOLES staff. The rest of the process should function in the same manner.

Figure 1.1 – Workflow for GOLES Complaints

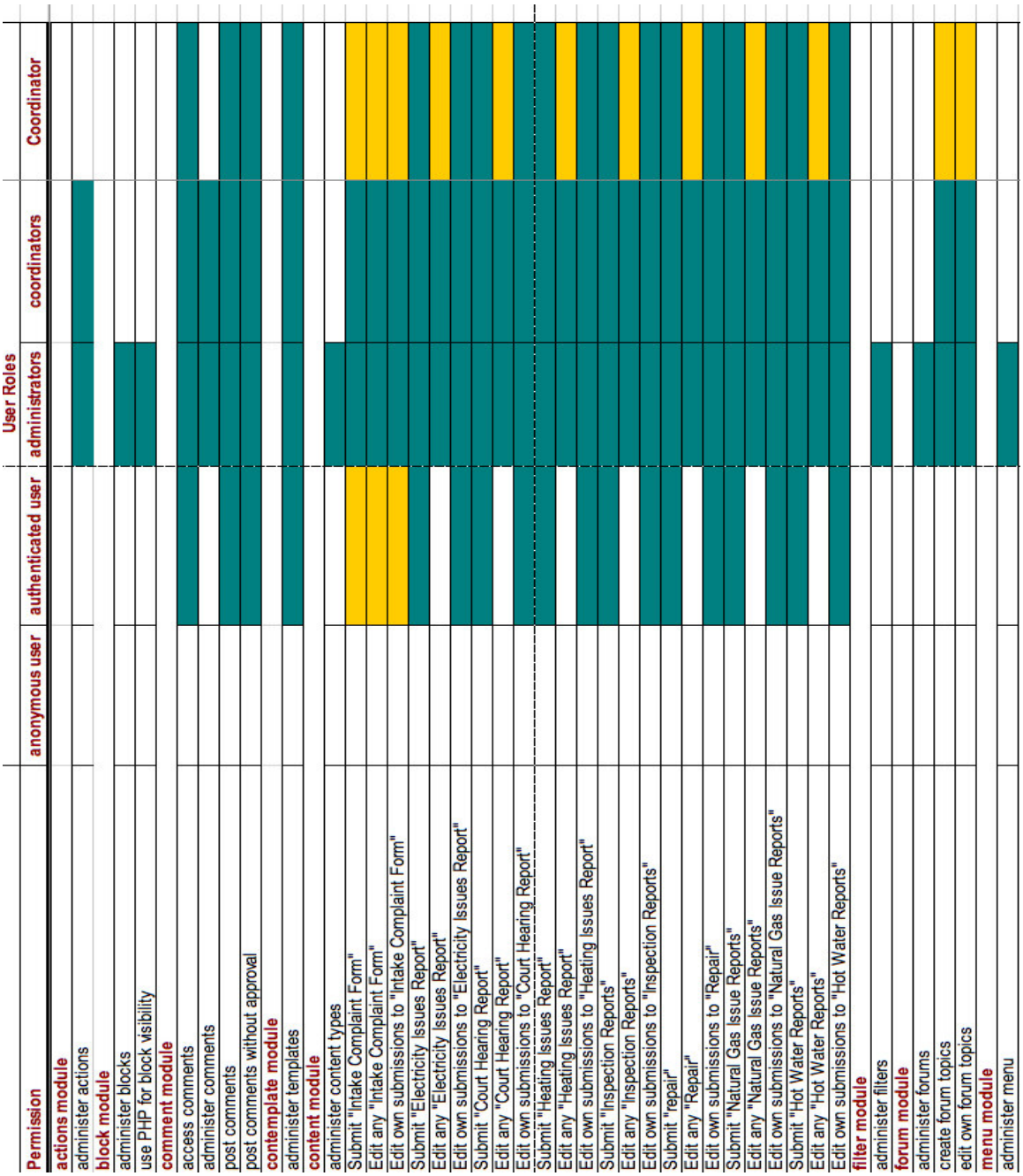


Site Moderation

Content will not be moderated automatically at first, but GOLES volunteers, coordinators and administrators will be able to scan new postings to moderate as needed. This should only be a major issue for the building-wide issues, as all other posts will be between the user and GOLES staff. These assumptions will have to be revisited as the site scales and the number of postings and participants increases.

SNAPSHOT OF ACCESS CONTROL LEVELS

Here follows the current access control levels. To modify Access Controls, see User Support Documentation: Section 2, How Do I Create Usernames and Set Access Control Levels



Permission	User Roles			
	anonymous user	authenticated user	administrators	coordinators	Coordinator
actions module					
administer actions			■	■	
block module					
administer blocks			■		
use PHP for block visibility			■		
comment module					
access comments		■	■	■	
administer comments			■	■	
post comments		■	■	■	■
post comments without approval		■	■	■	■
contemplate module					
administer templates		■	■	■	
content module					
administer content types			■		
Submit "Intake Complaint Form"		■	■	■	■
Edit any "Intake Complaint Form"		■	■	■	■
Edit own submissions to "Intake Complaint Form"		■	■	■	■
Submit "Electricity Issues Report"		■	■	■	■
Edit any "Electricity Issues Report"			■	■	■
Edit own submissions to "Electricity Issues Report"		■	■	■	■
Submit "Court Hearing Report"		■	■	■	■
Edit any "Court Hearing Report"			■	■	■
Edit own submissions to "Court Hearing Report"		■	■	■	■
Submit "Heating Issues Report"		■	■	■	■
Edit any "Heating Issues Report"			■	■	■
Edit own submissions to "Heating Issues Report"		■	■	■	■
Submit "Inspection Reports"		■	■	■	■
Edit any "Inspection Reports"			■	■	■
Edit own submissions to "Inspection Reports"		■	■	■	■
Submit "repair"		■	■	■	■
Edit any "Repair"			■	■	■
Edit own submissions to "Repair"		■	■	■	■
Submit "Natural Gas Issue Reports"		■	■	■	■
Edit any "Natural Gas Issue Reports"			■	■	■
Edit own submissions to "Natural Gas Issue Reports"		■	■	■	■
Submit "Hot Water Reports"		■	■	■	■
Edit any "Hot Water Reports"			■	■	■
Edit own submissions to "Hot Water Reports"		■	■	■	■
filter module					
administer filters			■		
forum module					
administer forums			■		
create forum topics			■	■	■
edit own forum topics			■	■	■
menu module					
administer menu			■		

Permission	User Roles				
	anonymous user	authenticated user	administrators	coordinators	Coordinator
node module					
access content	■	■	■	■	■
administer nodes			■		
revert revisions			■		
view revisions			■		
page module					
create pages			■		
edit own pages			■		
path module					
administer url aliases			■	■	
create url aliases			■	■	
poll module					
create polls			■	■	■
vote on polls		■	■	■	■
search module					
administer search			■		
search content	■	■	■	■	■
statistics module					
access statistics			■	■	
view post access counter			■	■	
story module					
create stories			■	■	■
edit own stories			■	■	■
system module					
access administration pages			■		
administer site configuration			■		
select different theme			■		
taxonomy module					
administer taxonomy			■		
upload module					
upload files			■	■	■
view uploaded files			■	■	■
user module					
access user profiles			■	■	■
administer access control			■	■	
administer users			■	■	
change own username			■	■	■
views module					
administer views			■		
workflow module					
administer workflow			■		
schedule workflow transitions			■	■	

BEGINNERS OVERVIEW OF MODULES

This site was made using the Drupal content management system. Drupal uses "modules" that can be activated to provide certain functions. Following is an explanation of the modules used in this project. These modules are arranged into the following groups:

- CCK and Related Modules
- Views and Related Modules
- Organic Groups and Related Modules
- Workflow and Related Modules
- TinyMCE Module

(For a more in-depth explanation of how these modules work, see Appendix D.)

CCK and Related Modules

- **CCK Module (Basic)**
  - The Content Construction Kit (CCK) Module allows for the creation and customization of fields for a Drupal site. The 4.7x version of CCK allows the user to create custom content types and allows the addition of custom fields to them.
- **Computed Field Module**
  - Computed Field is a CCK module that allows for the addition of computed fields to custom content types. These fields are also customizable – allowing the administrator to choose how the field will be formatted and displayed.
- **Date Module**
  - The Date module is actually a type of field for the CCK module. The Date module allows for the storage of dates in multiple formats. In addition, the administrator is given a choice of how dates should be input, allowing the choice of the method that best suits the needs of the user or system.
- **Phone Module**
  - The phone module allows for the inclusion of specific phone number fields in custom content types.

Views and Related Modules

- **Views Module (Basic)**
  - The views module provides a method for determining how content will be presented. This tool allows for the creation of custom views that pull together information into a single page.
- **Calendar Module**

    - The calendar module displays date fields in calendar format. It is used to display dates, but cannot be used to enter dates. The module also allows the user to use specific views – year, month, week and day.
- **Views Date Range Filter Module**
    - The date range module creates date range filters in CCK date fields. This means that the user can specify ranges of dates for which certain information applies. The module supports such fields as 'Custom date range', 'Outside date range', 'Before', 'After', 'within the past week', 'within the past month', 'within the past 3 months', and 'within the past year'.
- **Event Module**
    - The event module stores data and allows for the viewing of information in a calendar format. Information entered in events can also be used by other modules.

Workflow and Related Modules

- **Workflow Module (basic)**
    - The workflow module enables users to manage content using various states of completion
- **Workflow Fields Module**
    - The workflow fields module allows the CCK node fields to be made invisible or read-only depending on their stage in the workflow. This is helpful when people have different permissions regarding the information.
- **Action Module**
    - The Action Module allows the administrator to configure actions that will take place. For example, the “send email” function would allow the administrator to create an email form with specific fields that would be sent to a specified address upon submittal. This can be used in conjunction with the Workflow Module.

Tiny MCE Module

This module integrates the TinyMCE WYSIWYG (What You See Is What You Get) editor into a Drupal site for editing site content without knowing HTML.

RECOMMENDATIONS

As the project comes to a close, we have the following recommendations:

* Initially, GOLES should implement the site to replace their current paper-based entry forms. Using this process, they will be able to identify key fields or content types that should be added to make the site more functional.

* Once the site is set up to collect all of the necessary information, steps should be taken to make the site accessible for GOLES clients to enter their own information. This will decrease the load on GOLES coordinators in taking complaints, giving them more time to focus on providing educational and organizing events.

* Tenant Association Coordinators should also be granted access to enter information for tenants who cannot perform entry on the site themselves. This will further decrease the load on GOLES coordinators.

APPENDICES

Appendix A: Client Background

Eric Goldhagen is a media technology analyst for Openflows. He has 18 years of media and networking technology experience, and manages New York City's operations. In his non-work hours, he coordinates a public-access computer center in Manhattan.

In addition to being a Senior Partner at a consultancy that is perfectly poised to aid GOLES, Eric has also been a beneficiary of the assistance provided by GOLES. He became aware of their valuable services three years ago when the organization helped to keep him from being illegally evicted from the apartment he has lived in for 17 years.

Goldhagen has wanted to donate a tool to help GOLES in their mission ever since. He provided us with ideas for the modules we should use and what purposes the tool should serve.

GOLES was founded in 1977 by neighborhood residents and has worked with residents for the past 30 years to preserve affordable housing and to prevent displacement and homelessness. They see themselves as the leading force on the Lower East Side in preserving not only the historic buildings of the neighborhood, but also the community, institutions, culture and diversity of this uniquely New York locale. They state that their purpose it not just to win building improvements, but "to empower tenants."

Appendix B: Clients Requirements Analysis

Our project may be unique in that we are, in a way, serving two clients: Openflows, Inc. and GOLES.

We are providing the tool to the end user, GOLES, through the portal and connection of Eric Goldhagen of Openflows, who will serve to guide and mentor to us through the development of the project.

Here follows some background on these two organizations:

Openflows and Eric Goldhagen

Openflows is a consultancy (or “professional services” firm) founded in 2000 in Toronto, Canada, and now has consultants across North America and Europe. They are unique in that they use free and open source software to manage and operate their enterprise, as well as provide open source solutions to their clients.

They list their services as

- Content Management Systems
- Web Accessible Databases
- Network Based Collaboration
- Security and Auditing
- Clustering and Redundancy
- Office and Remote Office
- Email, Lists and Weblog

www.openflows.org states:

> "At any point, we can mobilize a diverse range of talents and skills in order to address our clients' specific needs and concerns. Because we deploy software from the public domain, we can build upon the work and accumulative experience gained by each project we complete."

Goldhagen is a media technology analyst for Openflows. He has 18 years of media and networking technology experience, and manages New York City’s operations. In his non-work hours, he coordinates a public-access computer center in Manhattan.

In addition to being a Senior Partner at a consultancy that is perfectly poised to aid GOLES, Eric has also been a beneficiary of the assistance provided by GOLES. He became aware of their valuable services three years ago when the organization helped to keep him from being illegally evicted from the apartment he has lived in for 17 years.

Goldhagen has wanted to donate a tool to help GOLES in their mission ever since. He has a good idea of how the system should be built, what models

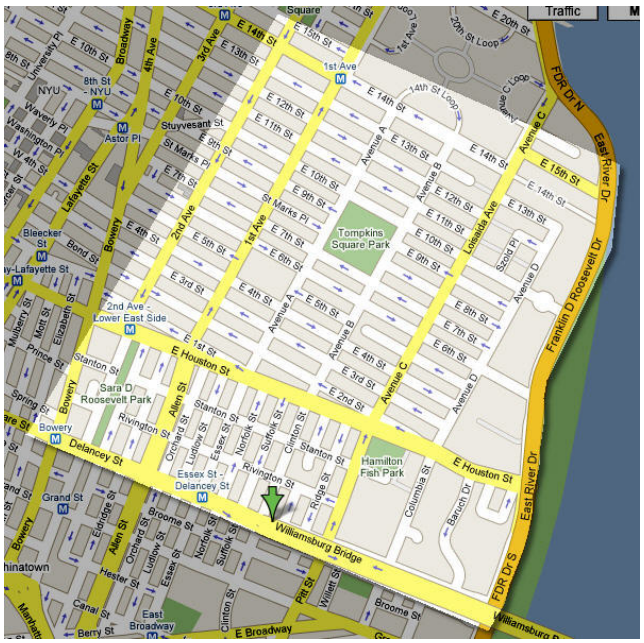
should be used and what purposes the tool should serve. He has made 2 separate attempts at creating the system in the past, and now feels that Drupal's capabilities have caught up with the needs of the organization in such a way that will require little programming.

GOLES

Good Old Lower East Side (GOLES) is a tenant's rights organization, located in Manhattan, New York, NY. On their website, GOLES summarizes their mission in the following concise paragraph:

"As a neighborhood housing and preservation organization, GOLES is dedicated to tenants' rights, homelessness prevention and community revitalization."

Founded in 1977 by residents of the neighborhood, GOLES has worked with residents for the past 30 years to preserve affordable housing and to prevent displacement and homelessness. They see themselves as the leading force on the Lower East Side in preserving not only the historic buildings of the neighborhood, but also the community, institutions, culture and diversity of this uniquely New York locale. They state that their purpose it not just to win building improvements, but "to empower tenants."



GOLES provides their services, free of charge to tenants who live between 14th Street and Delancey Street and from the Bowery/4th Avenue to FDR Drive. This area is directly west of the East River from Brooklyn, and just north/north east of the historic South Street Seaport area and China Town. There are several

Tenants' Associations (TAs) throughout the Lower East Side neighborhood, serving a diverse, multi-ethnic population. GOLES is an umbrella group for the coordination of these organizations.

The primary services they offer are as follows:

- Tenant Rights Counseling.
- Eviction Prevention
- Community Organizing
- Project-Based Section 8 Organizing
- Public Housing Organizing
- Training & Education
- Loisaida Voice: A free quarterly newsletter written by and for residents in English and Spanish.
- Tenant Association Development
- Landlord/Tenant Mediation
- Workforce Development.

How will the proposed project help with the organizational mission?

Goldhagen, who has worked closely with the staff at GOLES, estimates that the tool we will build for GOLES will aid in 90% of what the organization does on a daily basis.

At the moment, GOLES handles all the requests for help, training, mediation and their various services primarily through an outdated paper-based system, aided by a Microsoft Access database. They also use emails for long-term storage for internal communication, but it is hard for them to track the documents using just an e-mail client.

The system that we will develop will greatly aid in organization across and between the TAs served by GOLES. It will do this by enhancing the ability to identify unifying themes; such as shared issues between TAs and common property owners which to organize around. This new system will provide GOLES with the ability to see what they are doing on a larger scale, and the technology will facilitate communication among the people in GOLES and the people in TA. The system will also help GOLES in archiving the documents for ease of retrieval. The features of the new system support most of the work that people in GOLES perform, as most of their work is organizing tenants to confront their landlords, prevent eviction, etc., and this tool can really revolutionize the way they work. In addition to provide all these efficiencies, the tool will provide exponential improvements for reports to not only gage current progress, but also to show funders and the agencies to which they are contracted a quantified account of their contributions to the community.

Our project should also satisfy a years-long personal goal for Goldhagen: to give something back to the community organization that helped him. But on a larger scale, he sees the purpose of the project as being a prototype for a process by

which similar organizations can create comparable tools that will greatly enhance their ability to serve their populations.

In other words, if all goes as planned, perhaps the project could be recipe for other non-profits, giving enhanced meaning to this assignment.

STAKEHOLDERS

There are five major stakeholders in this project

- Openflows, Inc., represented by Eric Goldhagen
- Good Old Lower East Side organization
- The coordinators of current GOLES reporting, Shoshana Krieger and Wasim Lone.
- Over 150 Tenants' Associations (TAs)
- The tenants of the Lower East Side Neighborhood

Openflows and Eric Goldhagen

While Eric Goldhagen is a senior partner at Openflows, Inc. an open source consultancy for non-profits, he has also been a beneficiary of the services provided by GOLES. He became aware of their service to the community three years ago when the organization helped keep him from being illegally evicted from the apartment he has lived in for the past 17 years.

Eric has wanted to donate a Drupal-based site for managing requests and incident reports to GOLES ever since. He has a good idea of how the system should be built, including what Drupal modules should be used (specifically CCK, Views, and CiviCRM) in the implementation, and what purposes each tool should serve.

Eric seems very knowledgeable about Drupal and the Open Source movement in general. He has informed us that we will also be using Mantis, a bug-tracking system, as well as SILC in the process of developing the site.

Although Eric is our main contact and mentor for the project, he also plans to put us in touch with the staff at GOLES, so that we may evaluate on our own any changing needs that have developed and gain the insight necessary to contribute our own ideas to the development of the project.

GOLES

Good Old Lower East Side (GOLES) is a tenants' rights organization, serving various neighborhoods and housing projects in the Lower East

Side. As the organization central to the collection of service requests and complaints, it is presumably the primary stakeholder of the project.

GOLES has worked with residents for the past 30 years to preserve affordable housing and to prevent displacement and homelessness. They are also committed to “community revitalization” and protecting the multi-ethnic heritage of the area against encroaching gentrification. They see themselves as the leading force in the Lower East Side in preserving not only the historic buildings of the neighborhood, but also the community, institutions, culture and diversity of this uniquely New York locale.

GOLES provides their services free of charge to tenants who live between 14th Street and Delancey Street and from the Bowery/4th Avenue to the FDR Drive. This area is directly west of the East River from Brooklyn, and just north/north east of the historic South Street Seaport area and China Town.

GOLES has been operating since the late 1970s, primarily thorough community volunteerism. The organization currently handles all requests for help, training, mediation and their other various services primarily through an outdated paper-based system, aided by a Microsoft Access database and an email client, which they admit does not adequately serve their needs. However, the fact that multiple staff members are handling various requests often means opportunities for consolidation and streamlining are being overlooked. Additionally, the ability to efficiently archive and retrieve comprehensive histories is not being maximized in their current practice. We expected to help GOLES archive their documents through Drupal modules such as the file management system.

Ultimately the implementation of a new system will allow GOLES to identify emerging categories to better target the development of new programs to their constituents’ immediate needs. The tool will also provide increased reporting functionality, allowing GOLES to give quantified data for more credibility in further funding efforts and justification of their contribution to the community to the agencies with whom they are currently contracted.

Coordinators

Perhaps the most vital stakeholders to the successful planning and subsequent adoption of the system are those that will use it to support their day-to-day work functions. At GOLES those people are Shoshana Krieger, Community Organizer, and Wasim Lone, Director of Organizing. It is essential that Kreiger and Lone find the tool easy and enjoyable to use.

We had the opportunity to interview Kreiger and Lone on February 26th, well into the initial design phases of the project. The interview provided needed clarification and gave in depth insights that served to refine our ideas of their needs and expectations.

From this meeting, we discerned the following important points:

Main functions of GOLES:

- Counseling for tenants
- Advocating Tenants rights
- Managing Quarterly reimbursable grants

Three main agencies GOLES interfaces with:

- (City) HPD Department of Housing Preservation Dev: code enforcement
- (City) Dept of Buildings: structural
- (State) division of housing and community renewal DHCR.

The specific functions GOLES would like to see in the tool:

- Ability to cross-reference reporting so they can see the evolution of the initial complaint (whether it evolved to a violation or was repaired).
- Reporting tool (to report to city as well as to grantors/funders and show progress and changes over time).
- Function as a diary/journal for tenants. (The site could substitute for the journal they are currently told to keep).
- An area where both tenants and organizers can make complaints.
- Tracking cultural information/demographics. Help discern trends in household income, race, and education level. Etc.
- Tool to help determine vacancies and occupancy rates (information would come from the tenants: tips/leads)
- Tracking when tenants “double up” and “triple up” (moving into spaces originally meant for one person) that may be happening due to increases in rents.
- Tracking the counseling of clients. (The site we are building will not serve this function, but could expand to this function.)

Certainly Kreiger and Lone expect increased efficiency from the final product. We hope that our tool will fulfill this expectation, allowing for greater ability to make connections between issues, TAs and tenants, as well as enhanced tracking of issue resolution, recurrence and organizing opportunities; and significant improvement of archiving functionality for ease of history documentation, search, and retrieval.

As the main users and administrators of the system, it will be essential to have Krieger's and Lone's support for the ultimate adoption of the tool. It's important that their expectations be met.

Tenants Associations

Tenant Associations are formed and disbanded continually, and are not always hard and fast organizations, but often take on a project-based role, disbanding after an issue had been resolved, or forming around new issues. TAs may have as few as four or five members, coming together to try to improve the quality of their building, or there may be dozens of members organized across a many buildings that are all part of the same housing project. With the escalating property values in New York, TAs have become invaluable in the protection of affordable housing for all its citizens, as well as preserving the character of New York neighborhoods and the quality of life for its residents. TAs offer information, advice and advocacy for people living in rental properties throughout the city.

There are over 150 TAs throughout the Lower East Side neighborhood, serving a diverse population. Many are organized according to the various ethnic enclaves represented in the neighborhood, each united by shared culture and language. Residents speak anything from Ukrainian to Mandarin. GOLES serves as an umbrella organization for the coordination of these groups. They provide core services to help TAs reach residents and organize for advocacy.

It is apparent that the TAs need the most advanced tools possible. The system that we will develop would greatly aid in communications across and between the TAs served by GOLES. It would do this by enhancing their ability to identify unifying themes, such as shared issues between TAs and common property owners to consequently organize around.

Tenants

The tenants of the neighborhood are the ultimate beneficiaries of our project. GOLES already helps to support and improve the quality of life for citizens living in rental properties, but our tool has the potential to significantly upgrade the services the tenants receive.

It may be assumed that tenants have the expectation that their supporting organizations will make their best attempt at helping them to meet their housing needs. Successfully upgrading the technology of these organizations towards maximizing services is part of this attempt.

As mentioned in previous stakeholder benefits, the tool will be enable organizers to more quickly identify problems separate residents have in common. It may do this more directly as well by providing a forum for people to air their grievances.

We have noted other area tenants' associations provide message boards that allow for the emergence of organic themes among common grievances. The most obvious benefit for this type of online conversation is the exchange of useful information between community members. This type of forum also provides a method for increasing awareness and provides a natural focal point for residents to organize around emerging themes. The airing of grievances also serves as a vehicle for moral support and to provide the critical mass needed for groups to take action.

MOTIVATIONS

Eric Goldhagen

- Help an organization that once helped him.
- Create a replicable tool for adaptation and use by similar, community-serving organizations.

Good Old Lower East Side

- Increase their internal efficiency.
- Organize coordination between TAs.
- Enhance their ability to serve their constituency.
- Increase the visibility of their services, such as workforce development.
- Enhance their credibility as an organization by using statistical data to promote and develop future plans.

Coordinators at GOLES

- Provide maximum efficiency to their work functions by having more advanced technology to support their day-to-day tasks.
- Automate tasks so they can devote their time to the larger goals of the organization.
- Increase abilities to analyze and quantify their organizations' services and successes, to help in the allocation of resources, direction of the organization, and their ability to get funding.

Tenants' Associations

- Enhance communication between other neighborhood TAs.
- Increased voice and empowerment against encroaching interests that threaten quality of living and community cohesion
- Preserve the integrity of the neighborhood and the quality of life for the community members.

Tenants

- Preserve their basic right to having a home and choosing where they live as part of their rightful community.
- Improve connection with their neighbors and neighborhood.
- Protect from eviction and potential homelessness.
- Preserve their overall quality of life.
- Empowerment and provide access to aid and education.

TRAJECTORY OF THE SITE

At GOLES, the current process for the handling of complaints and requests for services relies heavily on a paper-based system, aided by the use of a Microsoft Access database and email client. Although this system is adequate for their reporting needs, information is not being utilized to its full potential, leading to inefficiencies in the complaint-handling process. One of the primary goals for this project is to replace this manner of processing with a more efficient system.

GOLES will receive the most benefit from this project when every pertinent user adopts the system. To achieve this, however, GOLES needs to overcome several challenges.

First, the GOLES employee who was initially involved in the planning of this project with Eric is no longer with the organization. Although certain employees are aware of the possibility of a new tool being developed, there is currently no one within the organization who is responsible for this project and its implementation. Such a person is necessary in order inspire, involve and educate the rest of the employees and volunteers about the new tool.

Second, it falls to the project team to develop and build a product that fits the needs of the stakeholders so that they can use the system to accomplish their tasks. In addition, the project team needs to design the system so that it integrates well with relevant processes without creating disruption.

Third, after the system is built, the major stakeholders will need to make major transitions in the way they work and communicate with one other. It will be important in this phase to show that this shift is worthwhile and will actually create benefits for the organization.

Finally, it will be necessary for the project team, or someone else involved in the project, to be available to provide technical and customer support during the early stage of implementation and adaptation of the system. A training session will be needed for the future GOLES system administers to manage the site. This will increase the likelihood of adoption.

If these challenges are overcome and the transition to the site goes smoothly, the future options of the trajectory of the site are almost boundless. Initially, the site will use access controls and group modules to develop areas for each of the individual tenant associations. With time, it will be possible for new groupings to arise around common issues and interests as the site grows. These groups could have their own sections of the site for their communications and administrative purposes. However, the creation of these groups may still need to be overseen centrally to ensure that everyone understands how to properly use the technology, as well as to coordinate interaction between groups that may have similar goals.

A particular function of the site, which will not be addressed initially, is the counseling of tenants. Goldhagen feels that within a year this functionality

can be incorporated into the site as administrators and volunteers become more comfortable with its initial uses.

The site may also grow to include more categories of requests and complaint-handling. While the initial categorization scheme may be fairly limited -- focusing on landlord-tenant disputes and requests for services -- as the adoption of the site grows, further categories may be deemed useful for reporting and service purposes. When these are identified, they can be added to the existing scheme.

Although the initial language supported by the system will be English, as the site is adopted it may be possible to expand these language offerings to include other major languages spoken by GOLES clients, such as Spanish, Ukrainian, Korean, and Chinese.

Once the site is established and in use by the primary stakeholders, it will be possible to extend the reach of the tool to include others through outreach into the community to other TAs, residents, and organizations similar to GOLES in the area through publicity at community data centers, libraries, and other likely gathering places. On a larger scale, should the tool be adopted and used successfully, it will be possible for the tool to be shared with similar organizations worldwide via the Internet. By allowing these groups access to a "recipe" for the creation of a similar Drupal site to meet their needs, it will be possible for this tool to have lasting and far-reaching effects far beyond the scope of the project.

Appendix D: Modules explanation

This document outlines the functionality and usage of Drupal modules for the GOLES Tenant Complaint System project. These modules are arranged into the following groups:

- CCK and Related Modules
- Views and Related Modules
- Organic Groups and Related Modules
- Workflow and Related Modules
- TinyMCE Module

CCK and Related Modules

CCK Module
The Content Construction Kit (CCK) Module allows for the creation and customization of fields for a Drupal site. The 4.7x version of CCK allows the user to create custom content types and allows the addition of custom fields to them.

Purpose
CCK provides a way for the site administrator to create different content types for easier organization. By default, Drupal only provides two types of content—page and story—for content creators to use. These two content types, however, are very general and not very useful for the purpose of the GOLES system.

Using CCK, GOLES administrators can create different content types with the names and fields that are more relevant for their particular content. For example, site administrators can create the content type “Hot Water Report.” In this content type, they can require the user to include information in the following fields: his/her name, address, apartment number, contact information, problem description, and other information that is helpful to the tenant association or GOLES coordinator in understanding the whole situation. For this system, the content types that have been created thus far include the main complaint intake form, court hearing report form, heating issue report form, natural gas and electricity issue report form, hot water report form, inspection report form, repair report form, and bed bug report form. The ease of use of the CCK module will make it possible for GOLES administrators to create further custom content types as their needs change, or to add additional fields as new information needs to be collected.

The ability to create different content types also makes it easier for administrator to organize, archive, and retrieve different content. If the coordinator wants to view a particular content type, s/he can also perform simple filtering, and the system will retrieve and display only the content that s/he specifies. For instance, a GOLES coordinator could use the filters to bring up only those hot water reports that were submitted in the past week.

Computed Field Module

Computed Field is a CCK module, which allows for the addition of computed fields to custom content types. These fields are also customizable – allowing the administrator to choose how the field will be formatted and displayed.

Purpose

One of the functions that complaint system will perform is the tracking of rent for each apartment over time. The current rent control and rent stabilization regulations only allow landlord to increase rents within a certain percentage of the current rent. Using the computed field, the system can quickly calculate and display the percentage that the rent has increased between periods or tenants, allowing tenants and GOLES coordinators alike to easily see whether these limits have been exceeded.

This module will also be useful in the calculation and display of the number of days that have passed between the time that a complaint has been submitted, and the current time.

Date Module

The Date module is actually a type of field for the CCK module. The Date module allows for the storage of dates in multiple formats. In addition, the administrator is given a choice of how dates should be input, allowing the choice of the method that best suits the needs of the user or system.

Purpose

Many of the content types created for the GOLES system using the CCK module require a “date” field as part of the information collected. The system uses date fields in many of the content types, including the date that tenant moved in, the date they first contacted their landlord regarding a specific problem, the date that their apartment was last painted, and also the date of an upcoming court hearing. Using the date module, we can more easily integrate these date fields into CCK content types.

Phone Module

The phone module allows for the inclusion of specific phone number fields in custom content types.

Purpose

The content types created for the GOLES system often require phone fields so that GOLES staff can contact the tenant for further questioning and/or investigation. This module provides a simple check to make sure that the information tenants provide is a legitimate phone number, and if not, provides the message that "phone numbers should only contains numbers and + and - and (and) and spaces."

Views and Related Modules

Views Module

The views module provides a method for determining how content will be presented. This tool allows for the creation of custom views that pull together information into a single page.

Purpose

With the Views module, GOLES administrators can generate customized page views that combine different "nodes" or content types together. With the data gathered from tenants, these customized page views will be used as distinct "reports".

Initially, the reports that the system will display includes "Building-wide Issues," "Apartments with Rent Increase Violations", "Apartments/Buildings with Unresolved Issues" and "Court Hearings in the Next Week." In the future, as new reporting needs arise, further reports/views could be created.

Calendar Module

The calendar module displays date fields in calendar format. It is used to display dates, but cannot be used to enter dates. The module also allows the user to use specific views – year, month, week and day.

Purpose

Many content types in the GOLES system contain time-sensitive information and important dates. By providing a calendar view of such important information, GOLES staff will be able to easily visualize and organize important dates such as upcoming court hearings or inspections.

Views Date Range Filter Module

The date range module creates date range filters in CCK date fields. This means that the user can specify ranges of dates for which certain information applies. The module supports such fields as 'Custom date range', 'Outside date range', 'Before', 'After', 'within the past week', 'within the past month', 'within the past 3 months', and 'within the past year'.

Purpose
GOLES coordinators often need to know the timeframe in which complaints are submitted, or that the status has changed. This module will allow system to output views/reports that contain complaints filed in the past week, or those where the status of the complaint has changed (from unresolved to resolved).

Views Fast Search Module
The views fast search module is an alternative to the standard views search. In addition to being faster, the search supports using AND and OR constructs, exceptions, quoted terms, and sorting results based on a compute “score”.

Purpose
This module enables a more powerful search scheme than the Drupal built-in search. With such as large database of information and reports, GOLES staff need powerful search to facilitate their daily routine work.

Event Module
The event module stores data and allows for the viewing of information in a calendar format. Information entered in events can also be used by other modules.

Purpose
This module enables the system to keep track of different events that are important to the tenants such as court hearing dates, dates that the complaint were submitted, and the dates that the complaints were resolved.

Workflow and Workflow Related Modules

Workflow Module
The workflow module enables users to manage content using various states of completion

Workflow Fields Module
The workflow fields module allows the CCK node fields to be made invisible or read-only depending on their stage in the workflow. This is helpful when people have different permissions regarding the information.

Purpose

Workflow and workflow fields work together to allow CCK content types to have different states in a workflow. The complaints in the GOLES system will have two states: unresolved and resolved. As the complaints are submitted, the status of the node is considered “unresolved.” After GOLES staff work with tenants and resolve the issue, GOLES staff can change the status of the node to “resolved.”

Action Module

The Action Module allows the administrator to configure actions that will take place. For example, the “send email” function would allow the administrator to create an email form with specific fields that would be sent to a specified address upon submittal. This can be used in conjunction with the Workflow Module.

Purpose

Working in conjunction with the workflow module, the Action module provide features that GOLES staff can set-up according to different transitions and state in the workflow. When a complaint of any kind is created (submitted by tenant), they system will notify GOLES staff via e-mail.

TinyMCE Module

This module integrates the TinyMCE WYSIWYG (What You See Is What You Get) editor into a Drupal site for editing site content without knowing HTML.

Purpose

The WYSIWYG editor allows users to do advanced formatting when creating and editing content without know technical details about HTML. This module will allow GOLES administrators and other content creators to generate posts using familiar formatting tools.

APPENDIX E: PERSONAS AND SCENARIOS

Four personae represent three classes of users. Each persona is fictitious, based purely on the imagination of the authors. For each persona, one or more usage scenarios follow. The personae are:

- Karen Burkson, GOLES coordinator
- Megan Peterson, Tenant Association Volunteer Coordinator
- Paula and Sylvia, tenants

Karen Burkson/GOLES Coordinator

Karen is a coordinator at GOLES. She grew up in the city and has always stayed in the area. Karen is married to James Burkson and has two children: Janet (7 years old) and John (4 years old). Both Karen and James work full-time in the city, and the children go to pre-school and day care during the day. Even though they are both working, they truly value balancing work-life and family time. Karen and James enjoy bringing their children to parks and having picnics during weekends.

Karen is easy-going and has a lot of friends. Sometimes when her husband takes care of their two children, she hangs out with her friends, enjoying activities such as shopping and attending book clubs. She also likes walking and other outdoor activities. Karen and James used to go mountain climbing and kayaking together before Janet came along. Of course, they rarely have this kind of luxury since their cute children were born. Nevertheless, they still travel, accompanied by Janet and John, during vacation times.

Karen started working as a staff administrator at GOLES after she graduated from New York University with an economics degree 10 years ago. As a program coordinator, Karen oversees several of GOLES' campaigns, including Tenant Association Development and Landlord/Tenant Mediation.

Scenario

She will be one of the main administrators for the new complaint-issuing system. Karen currently uses a Access database to log complaints, but it has no archiving or organizing features.

With the new tool, she will have privileges to access all features including administrative sections of the site. She is able to view all the complaints filed by

either the tenants or tenant association staff. It's possible for her to access all "group sites" of every tenant association and see the complaints that have been issued. With access to all group sites, Karen can form a better picture of the issues that are associated with different areas/buildings. Karen and the other administrator of the site will use the system to see who is coming to them for assistance. They will be able to note the name of the tenant, his/her address, complaint, and also severity and reoccurrences of the issue, allowing for a clearer overall picture of what is going on in the entire area. They will also use the system to generate reports presenting facts such as multiple people coming with the same problem. The system will allow Karen to access archived complaints, and also track what issues are still active. The data will be used as supportive information for future plan development and execution.

Karen is also responsible for budgeting funds and helps to support fund raising efforts. GOLES like any non-profit, tries to organize their monetary resources and utilize this money as efficiently as possible. The system will provide Karen with better idea of the type of the problems that occur most frequently and also other information that can be taken into consideration when distributing funding. She can also use the documentation to support fund raising efforts such as data to support grant applications.

Current Solution:

- Log grievances in a database.
- Aggregate grievances over time through database manipulation.
- Make best guesses based on current information as to what services should be enhanced, and what benchmarks have been accomplished for funding evidence.

Problems:

- No way to effectively aggregate information or search across many clients.
- No way to effectively archive or retrieve information.
- Cannot accurately gage results of their efforts.

Needs:

- A tool that can organize, categorize and aggregate information across association, tenants, landlords, and locations.
- A way to make reports that can be presented per topic.

- A way to give measurable results in order to concentrate future efforts.

Feature of the new tool:

- Online organizing per category.
- Online reports that aggregate information instantly across clients, landlords, and locations.
- Online forums to share information between associations.

Megan Peterson/ Tenant Association Volunteer Coordinator

Megan Peterson is a forty-six year-old woman, who has been living in the lower east side of New York for 20 years. She is a volunteer at GOLES. Before doing volunteer work, she worked as a secretary in a mid size food company. She decided to do something meaningful, such as improving the living standards of the tenants around her neighborhood, so she volunteered two years ago after her retirement. Now she works three days a week

Megan has three children and all of them left New York for jobs and college. She lives with her husband Donald. In her spare time, Megan loves to read. She also goes to cooking school once a week because she thinks that cooking is one of the best and easiest ways to bring happiness to people.

As a volunteer at GOLES, Megan handles various issues involving different people. She provides legal advice about tenants' rights under local, state, and federal law. She also promotes tenant-landlord relationships by coordinating regular meetings between tenants associations with similar issues.

In Megan's opinion, while conflicts between tenants and landlords sometimes arise because of lack of communication, the majority of issues speak to the fact that corporate interests are systematically conspiring to remove tenants from the neighborhood in order to build high rise apartments. These actions displace community members and make rents unaffordable to people who have been living in the neighborhood for generations. By informing tenants of their rights, she believes that there may be a chance to keep the character of the neighborhood despite the power of the corporate interests.

Megan's "pain points" in her work are tracking repair issues for tenants and organizing information in a meaningful way to support the coordination of groups with similar issues. She doesn't like to spend time on repetitive searches and making announcements. She wishes there could be a tool to improve the efficiency on these tasks so she can provide better service.

Scenario:

It was Monday morning and Michael was incredibly cold because his apartment's heat was not working, again! He'd caught a really bad cold and had to take a day off for work. Michael had called his landlord several times about this issue, and never got a response. He was tired of these repeat heat shut-offs, and wanted to know if there was anything he could do about it legally, since he had complained to the landlord so often with no satisfaction.

Michael had heard of GOLES from a neighbor who overheard him complaining to the barista at the coffee shop about the conditions in his apartment. He happened to pass their location on the way to the clinic, and after his visit with the doctor, he dropped in to see what GOLES could do for him.

Megan greeted Michael as he entered. She listened knowingly to his complaints, and gave him a paper form to fill out so that GOLES could keep track of his issues. She encouraged Michael to begin keeping a journal of the incidents at his apartment, although she could not provide him with any sort of official record keeping system or materials. She told Michael about a tenants association that is registered in his building. The last known record of the association was from over a year ago, so she wasn't sure if this association was still actively holding meetings, but she shared the contact information with him on a slip of paper and encouraged him to call the association leader. She said if he learned the association was defunct, he should consider starting a new one with the tenants of the building, as she was pretty sure that two other people from the same building had come in earlier in the week and spoken to other volunteers, but she couldn't be sure how to put her hands on that information, since it wasn't yet in the database and her co-volunteers were at lunch.

Megan told a story about how tenants of a building a couple of blocks from Michael's had recently banded together to file a suit against their landlord. She brought up this to encourage him that these reporting efforts could have an eventual positive outcome and are not just officialdom for the sake of record keeping.

Finally, she gave Michael the number to the city reporting agencies and encouraged him to start an official case with the city's department of Housing and Preservation as well as the state's division of housing and community renewal. She urged him to report back to GOLES with his case information.

Megan waited until Michael left, and then got busy with inputting the paper-based information into their database, but before she could finish another client walked in, so she shelved the paperwork to complete later.

Current Solution:

- Fill out and file paper based forms and then input the forms in to the database.
- Encourage tenants to make their cases official and report back to them with case numbers.
- Provide clients with information on paper about tenants associations in their area.
- Encourage clients to keep a journal of the activities in their building.

Problems:

- Paper-based solutions make tracking similar issues cumbersome.
- Not able to give up-to the minute current information as there is lag time getting information into the database.
- Repeat efforts as tenants provide written forms, and volunteers must then input the information electronically.
- Not much incentive to get clients to return to give information that can help GOLES keep accurate reports.
- No centralized space for tenants to review or share information other than through GOLES.

Needs:

- To provide a quick reference to give clients all the information they need, as accurately as possible.

- To give clients an incentive to provide ongoing information such as status updates and case numbers.
- To provide a more efficient way of capturing information that does not involve repeat form entries.
- To give clients a centralized, non-physical space for posting and receiving information.

Feature of the new tool:

- Online database of all issues, available as they are reported, for ease of tracking, with a search feature for administrators to search by a variety of variables and provide clients with accurate, timely information.
- Online forms to provide ease of entry and eliminate administrative burden on volunteers.
- Personalized journals for clients to log in information and share with the public, providing both a public grievance space as well as built-in incentive to encourage reporting.
- Online chat forums for tenants to organize organically through the web space.

Paula Dinelson/Tenant

Paula is 26 years old. She came to New York from Pottsville, PA, after her high school graduation, to pursue an acting career. She is a waitress at a local diner. She and her roommate Angela share a loft apartment in the Lower East Side.

Although they previously had no altercations, lately things have changed. Legal action has required the tenants to pay all of their money into escrow, until her landlord makes required improvements to their building. This has not improved matters. Although they are keeping up with their payments, their landlord can now often be seen in the building demanding his rent. He is also refusing to make any of the repairs, and occasionally shuts off the heat or electricity in the building on weekends in retaliation.

Paula first hears about GOLES from Mike, one of the cooks at her diner. He tells her that in his building they have organized a tenant association and they have asked GOLES for help in gathering information and learning about their rights.

She wonders if people in her building have organized an official tenants association beyond putting their rent in escrow.

Later that week, she visits the Community Data Center to send her parents an email, since it is cheaper than a long-distance call. There she sees a flyer for GOLES. Remembering Mike's comment, she decides to take a look at the site. The current site has some information about what GOLES does, but no place to log an official complaint or search for a tenants association that may exist for her building. She takes note of the location and hours for GOLES, and resolves to make it to the office sometime on her day off on Monday.

Current Solution:

- Spread word of GOLES services through word of mouth, the website, and neighborhood flyers.
- Tell tenants to come to GOLES location to learn about their rights and fill out a grievance form.

Problems:

- No way to remotely log grievances.
- No way to learn about building-specific issues or see possible organizational efforts for specific locations.
- No incentive to participate in collaborative reporting for mutual benefit of other neighborhood residents.

Needs:

- A form tool for tenants to remotely log in grievance information.
- A centralized user-specific diary to encourage timely reporting of recurring incidents after users are registered with the web site system.
- A place where users can search for specific associations or building information.
- A forum for tenants to share information amongst themselves.
- More comprehensive, customized information about steps to take when organizing for action.

Feature of the new tool:

- Online forms for reporting information directly to GOLES database.
- Online journal for ongoing reporting for each user account.
- Online search so that tenants can find information about specific buildings or landlords.
- Online message board forums for users to interact and share information.
- Customized "next steps" information given upon submittal of specific grievances.

Sylvia Greene/Tenant

Sylvia is a 67-year-old woman who has been living in the Lower East side for the past 30 years. She has been a widow for five years. Previously she was a nurse in the local hospital. Although she is retired, she still volunteers three times a week at a local clinic, filing paperwork and chatting with patients as they come in for their appointments. The volunteer work gives her something to do, and the clinic is happy for her cheery disposition and her help with their Spanish-speaking clients, even though she cannot use a computer. Sylvia had taken a class at the local library a few years ago, but had a hard time following all of the steps.

Sylvia lives in a building with a lot of other senior citizens, and some younger people, mostly immigrants and students. Their building is one of the older ones in their Lower East Side neighborhood, and is in need of a lot of repairs. For one, the lights on the landing of her floor have been out for a few weeks. Although it was reported to the landlord, nothing has been done. Also, their elevator has been out of order for over a month now. Although Sylvia is in pretty good shape, the climb to her 5th story apartment has been hard on her knee, and she often finds herself taking a break on the 3rd floor landing.

It is here that she one day sees a notice for a meeting of the tenant association. The notice says that there will be a discussion of building issues. Sylvia decides that she will go to the meeting.

At the meeting, a few people speak about what was happening with their building and nearby buildings, as well as comparing notes about what complaints have been issued. Sylvia speaks up and volunteers that she has logged a complain with the city about the lights in the hallway on her floor being out. Another tenant says that she believe her neighbor has logged in a complaint about a leaky

ceiling, but she can't remember to who the complaint was made. The man couldn't make the tenants meeting because of his work schedule. A young woman named Paula stands up and mentions that all people in attendance should make a visit to an organization called GOLES on Avenue B to officially log their grievances and let them know what is happening in their apartments, as GOLES can help them all to organize for a possible legal action if things continue to be neglected around the building. Sylvia thought that David reminded her lot of her daughter at that age, who now lives in Boston with her three grandchildren. Paula shows the other tenants a website that shows the location and office hours for GOLES. Sylvia thought it was all pretty interesting, but not being an Internet user, she took down the information with a pen on her date book.

At the end of the meeting, Sylvia went over to talk to Paula. Paula volunteered to go with Sylvia the following week to help her register her complaint with GOLES.

Current Solution:

- Tell tenants to come to GOLES location to learn about their rights and fill out a grievance form.
- Learn through word of mouth what tenants have logged what grievances with the city and state authorities.

Problems:

- No way to access logged grievances for particular locations.
- No way to remotely log grievances.

Needs:

- A search feature for tenants to see what their neighbors have reported and to help with organizing efforts.
- A forum for tenants to share information amongst themselves.
- Feature of the new tool:
- Online search so that tenants can find information about specific buildings or landlords.
- Online message board forums for users to interact and share information.

GOLES Complaint System User Documentation

SI 631—Content Management Systems

Rebecca Carter

Nisha Erinjeri

David Hsiao

Cheng-Lun-Li

GOLES Complaint System - User Support Documentation

The following documents are user support for some of the basic tasks GOLES will perform with the new website. Since different people may be responsible for different tasks, the user documentation for each task stands alone, and covers logging in through the end of the task. The following tasks are included:

Section One:
How Do I … Enter New Tenants/Landlords/Buildings into the System? 2

Section Two:
How Do I … Create Usernames/Passwords and Set Access Control Levels? 5

Section Three:
How Do I … Perform a Basic Intake? 10

Section Four:
How Do I … Run Queries in the GOLES Complaint site? 14

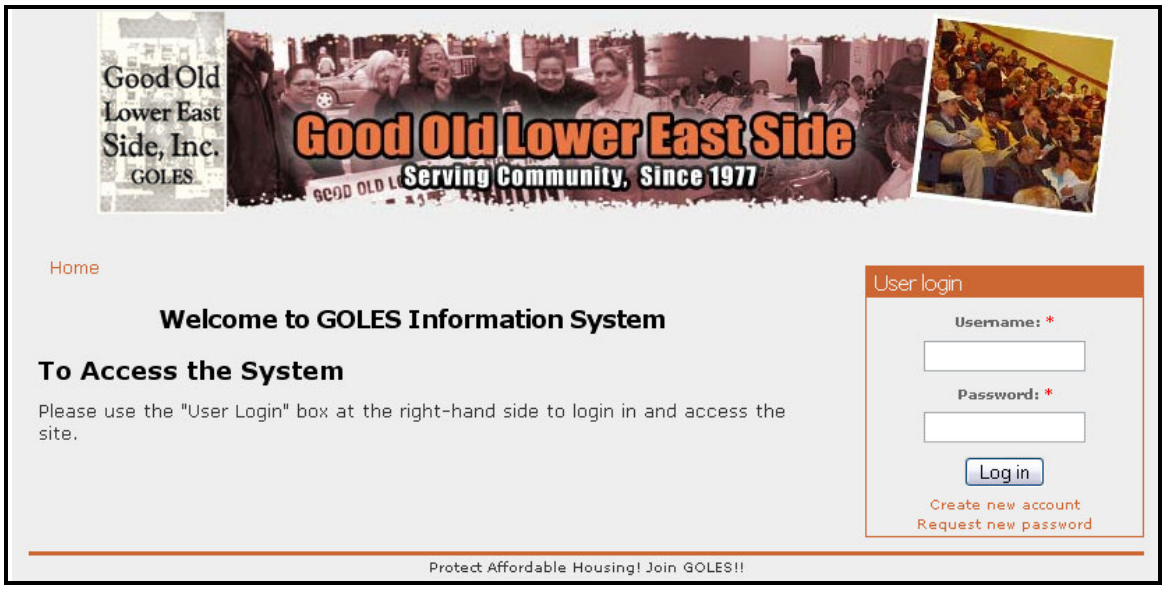
Section Five:
How Do I … Modify the Questions in the Forms? 19

Section Six:
How Do I … Add Announcements or Events? 28

Section One: How Do I … Enter New Tenants/Landlords/Buildings into the System?

Step One: Navigate to the GOLES Complaint System site

- Direct your browser to http://golesproject.openflows.org/login



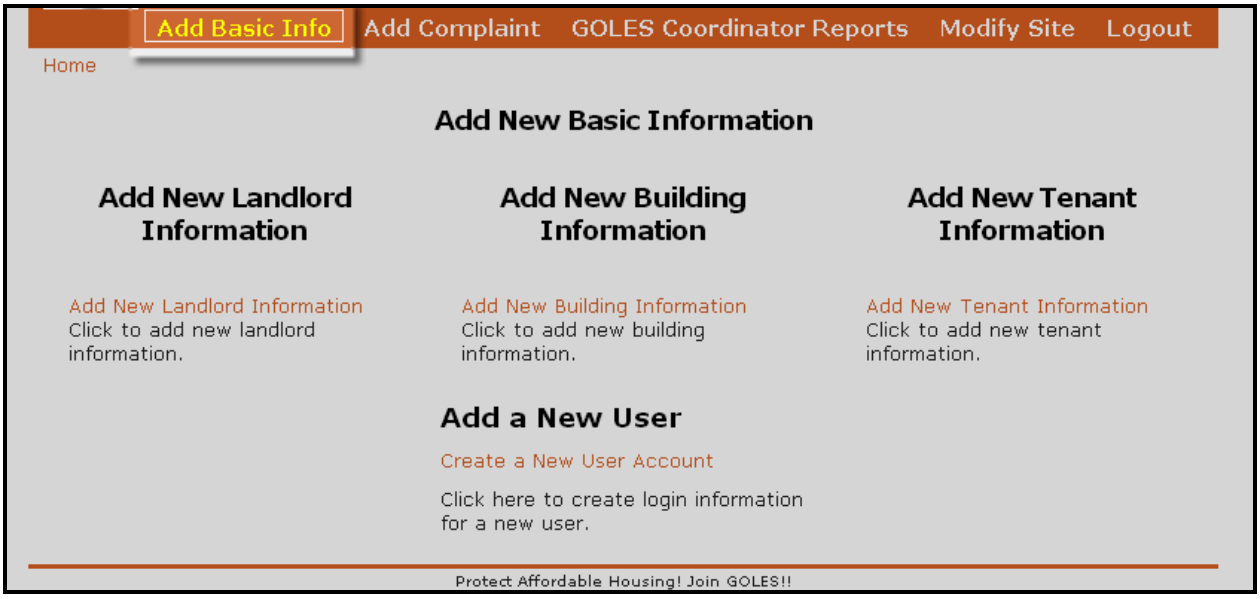
Step Two: Log In

- Enter your username and password in the login box (provided separately) and click on the "Log in " Button

- This will log you into the site and give you more navigation options across the top.

Step Three: Create a New Record

- Click on the "Add Basic Info" link. The following screen will be shown:



- Choose the type of information that you would like to enter.

  Please note, the information being entered is dependent on the preceding information from left to right (i.e. in order to enter tenant information, landlord and building information must be entered first.)

- Enter the information into the form *(tenant information screen shown)*

- Scroll to the bottom of the page and click on "Preview" or "Submit"
- Repeat as necessary.

Section Two: How Do I … Create Usernames/Passwords and Set Access Control Levels?

Step One: Navigate to the GOLES Complaint System site

- Direct your browser to http://golesproject.openflows.org/login

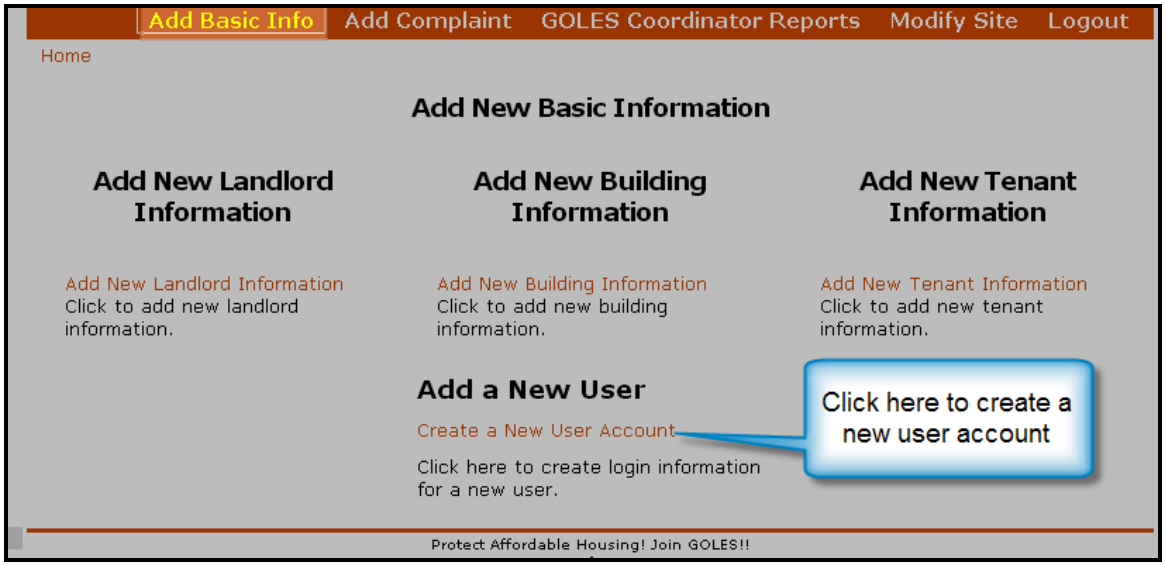
Step Two: Log In

- Enter your username and password in the login box (provided separately) and click on the "Log in " Button

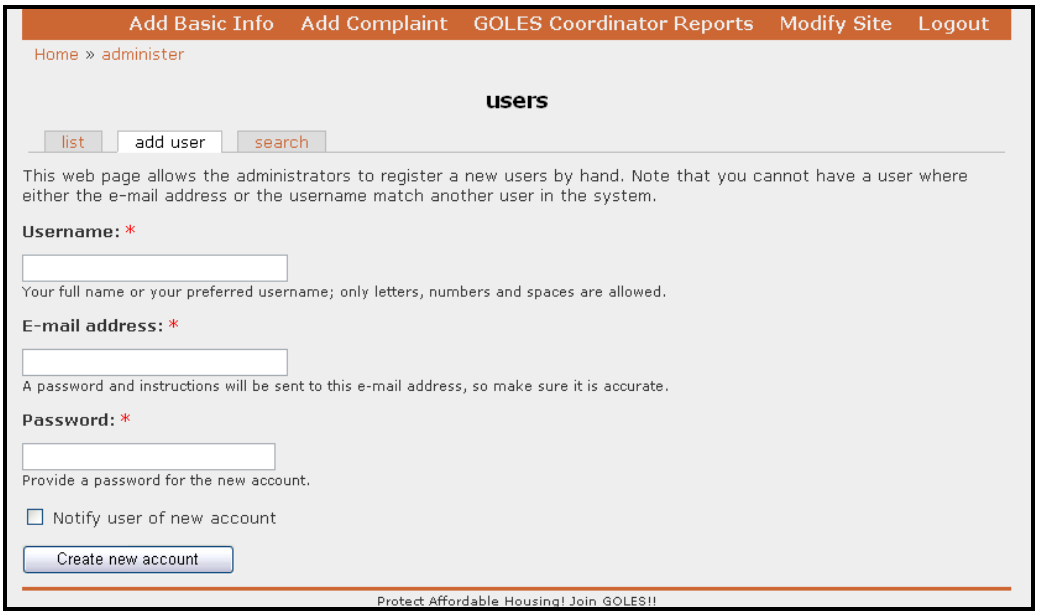
- This will log you into the site and give you more navigation options across the top.

Step Three: Create a New Username/Password

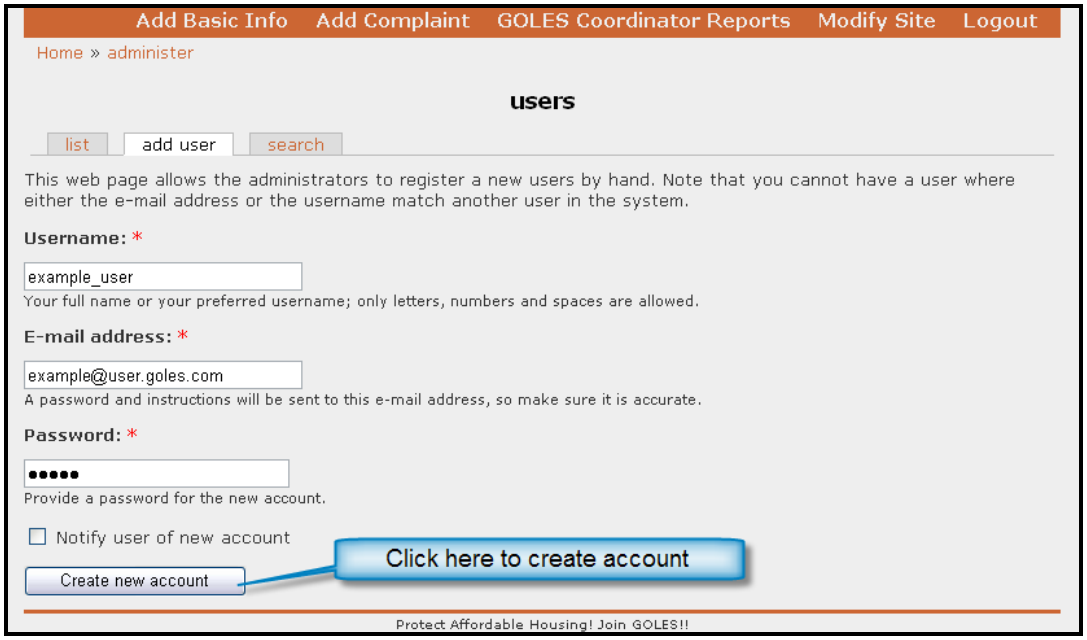
- Click on the "Add Basic Info" link. This will take you to the "Add Basic Information" screen.



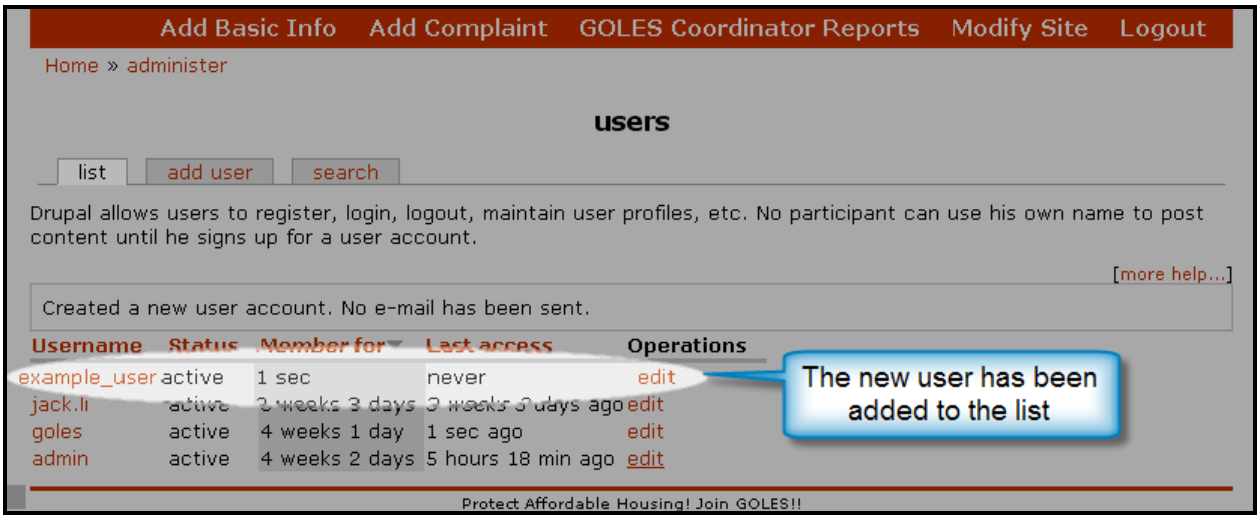
- Click on "Create New User Account". This will take you to the "users" page.



- Fill in all of the information, and then click the "create new account" button.

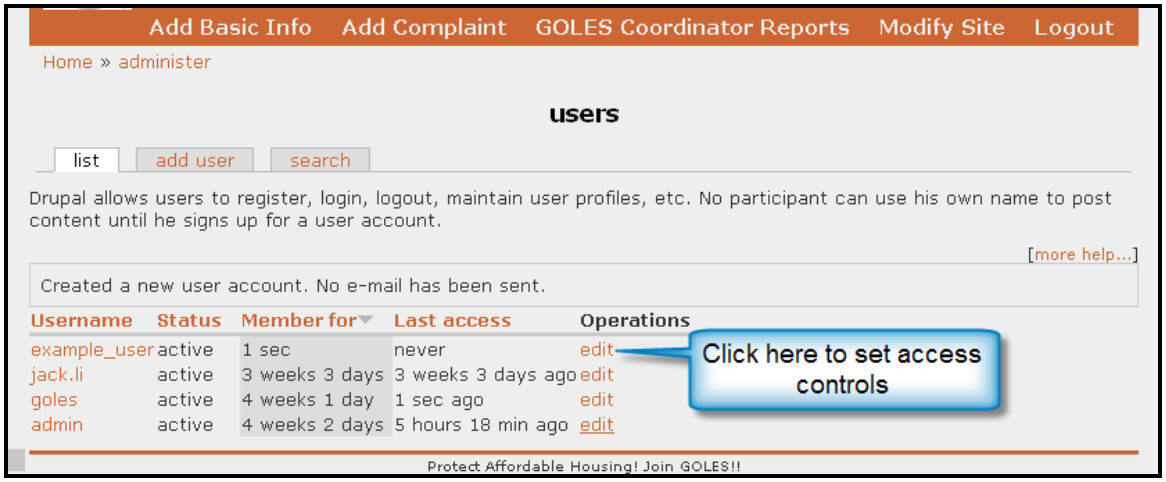


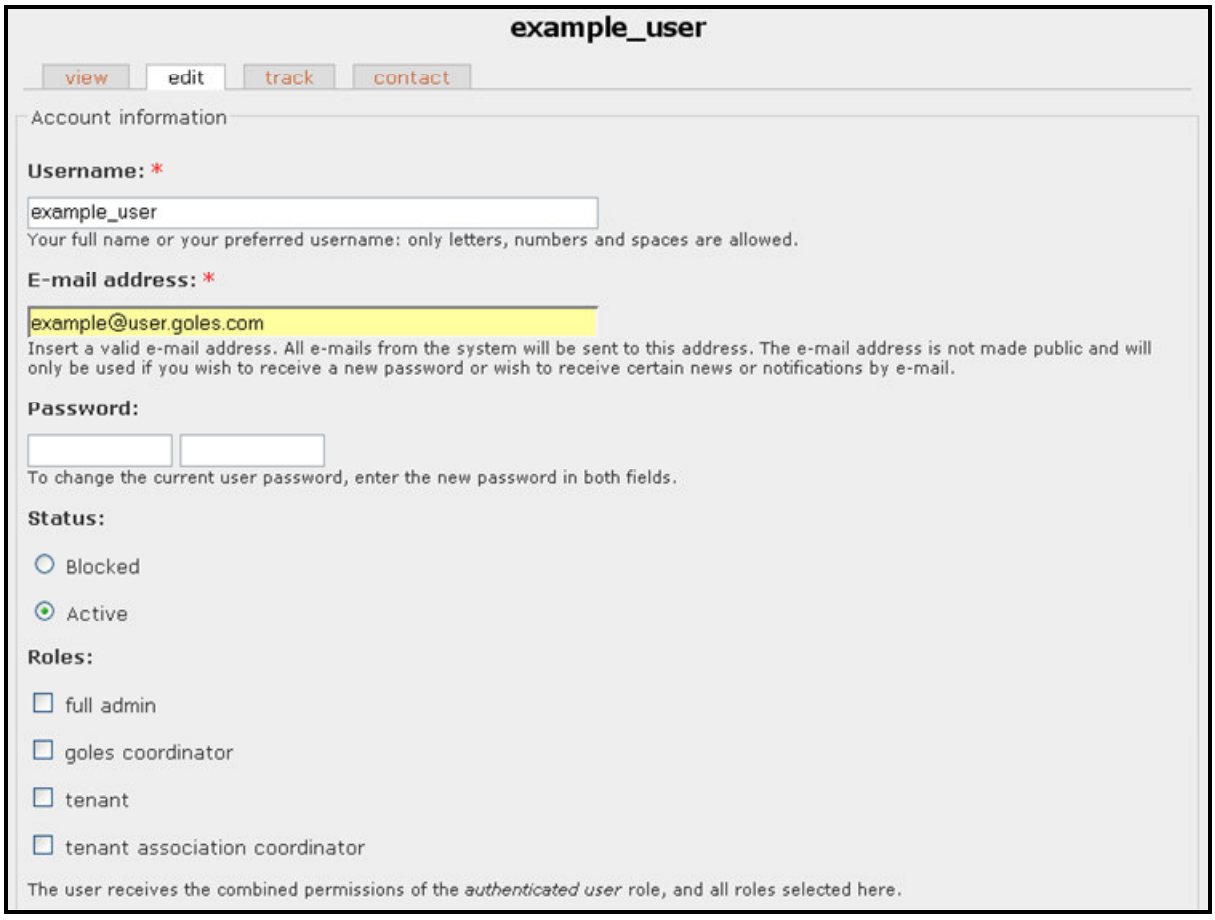
- This will bring you to the confirmation screen, where the new user will be at the top of the list



Step Four: Set Access Control Levels

- Click on the "edit" link next to the newly created username. This will take you to the settings page for the individual user.





- Scroll down to the "roles" section. Here you can choose the role that they will be given by checking the box next to it.

    - **Goles Coordinator –** this role is reserved for GOLES coordinators and interns. These people will have access to adding all complaint information, running queries, and modifying some of the site features.

    - **Tenant Association** – this role is reserved for tenant association coordinators. In the future, these people will be able to enter their own information, but also enter information for new tenants.

    - **Tenant** – this role is for all other users of the system. In the future, these people will be able to enter their own information and view their personal history.

- Scroll down and click the "submit" button.

Section Three: How Do I … Perform a Basic Intake?

Note: Basic Intakes are performed by GOLES Coordinators when tenants first visit their office. This is a detailed list of the initial problems with a tenant's apartment.

Step One: Navigate to the GOLES Complaint System site

- Direct your browser to http://golesproject.openflows.org/login

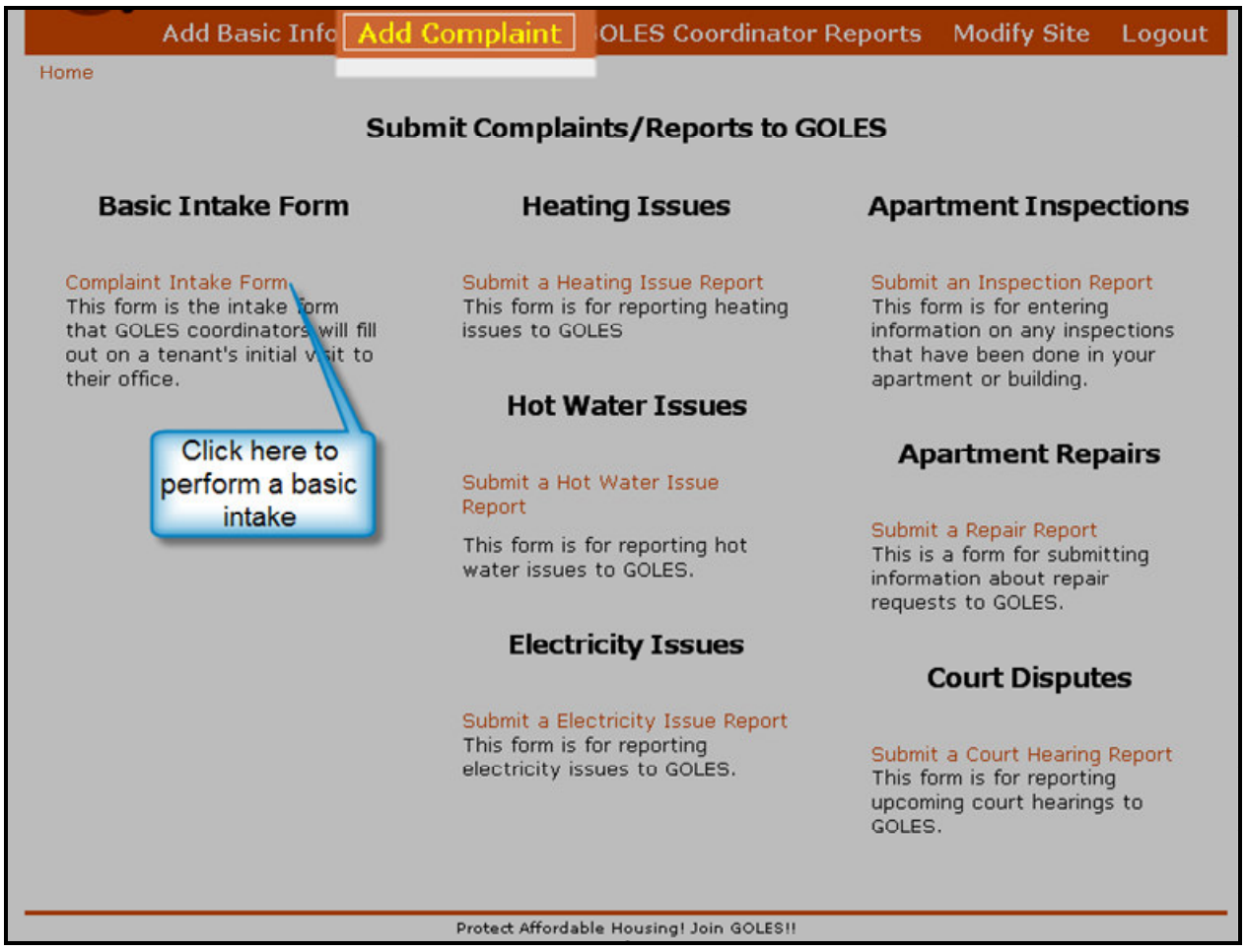
Step Two: Log In

- Enter your username and password in the login box (provided separately) and click on the "Log in " Button

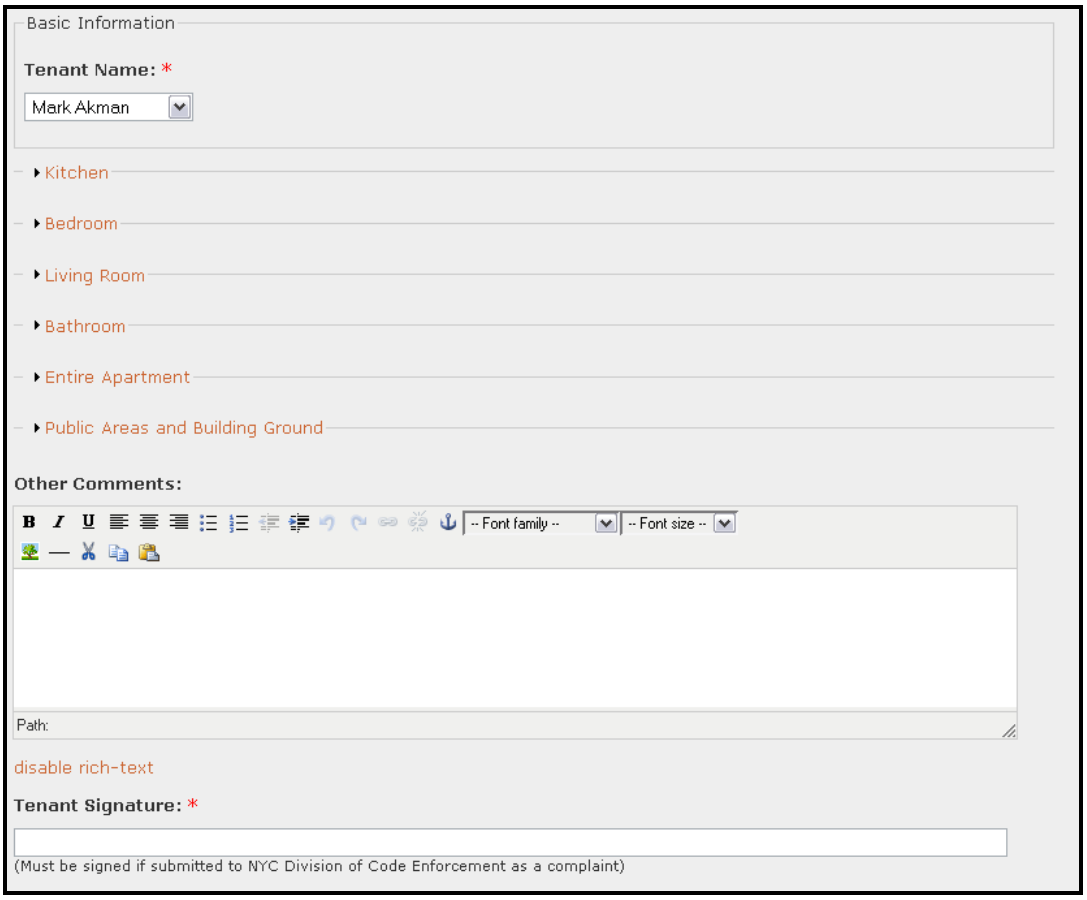
- This will log you into the site and give you more navigation options across the top.

Step Three: Navigate to Basic Intake Form

- Click on the "Complaint Intake Form" link. This will take you to the "Submit Complaints/Reports to GOLES" screen.

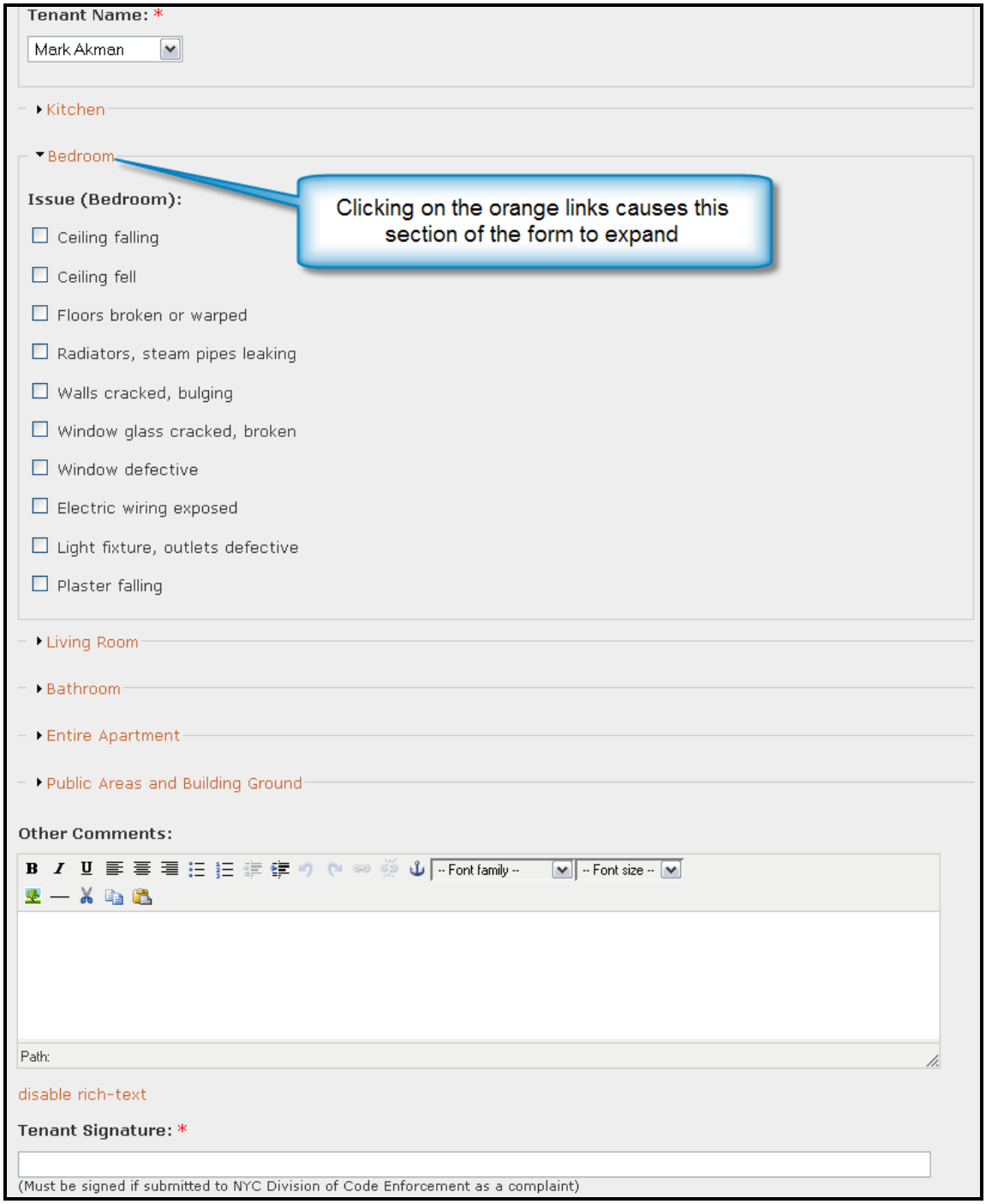


- Click on the "Complaint Intake Form" link. This will take you to the Complaint Intake Form.



- Choose the tenant name from the dropdown list. (*Note: if the tenant name does not appear in the list, you must go back and add tenant information before completing the form*).

- To complete information for sections of the apartment, click on the orange links labeled: kitchen, bedroom, living room, bathroom, entire apartment, public areas and building ground. This section of the form will expand, revealing the possible problems.

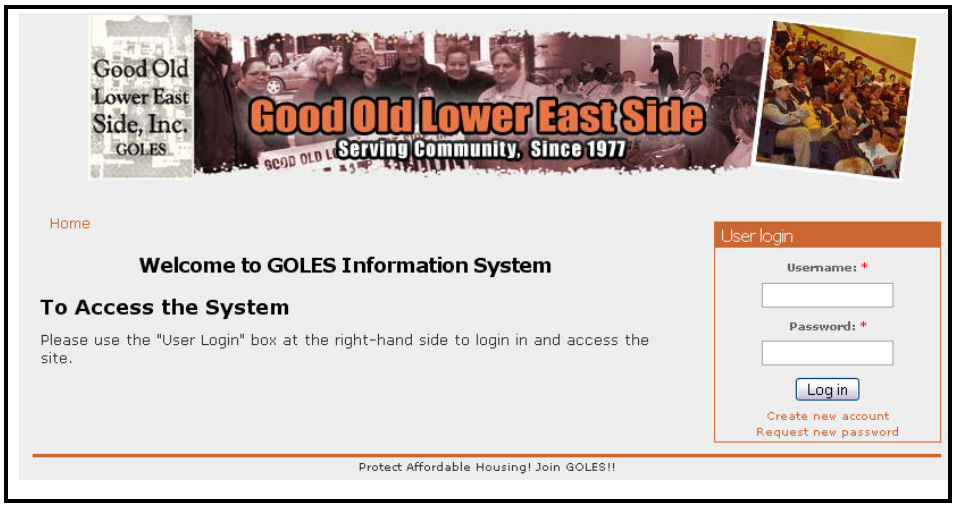


- When all information has been completed, click on the Preview or Submit buttons at the bottom of the page.

Section Four: How Do I … Run Queries in the GOLES Complaint site?

Step One: Navigate to the GOLES Complaint System site

- Direct your browser to http://golesproject.openflows.org/login



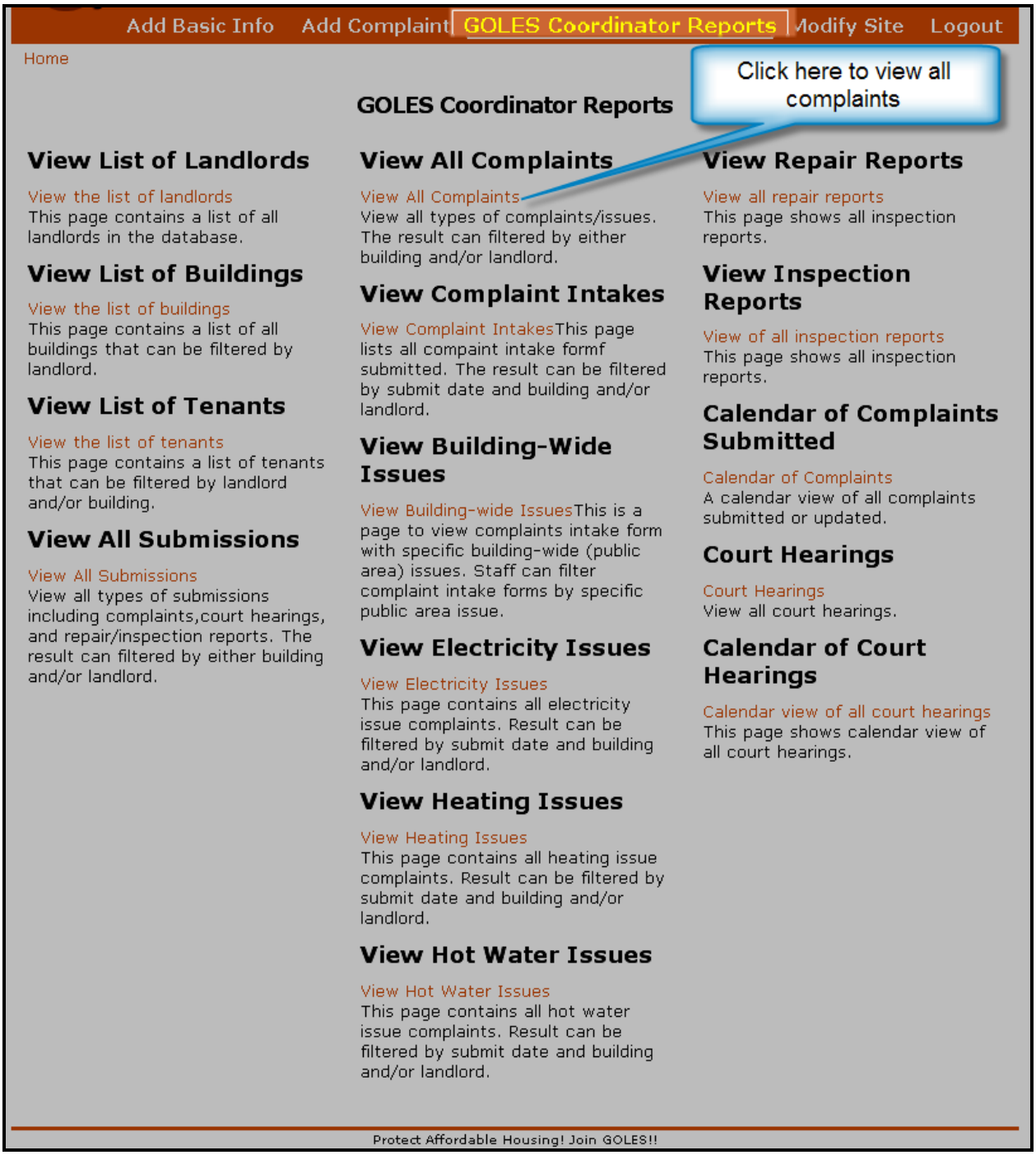
Step Two: Log In

- Enter your username and password in the login box (provided separately) and click on the "Log in " Button

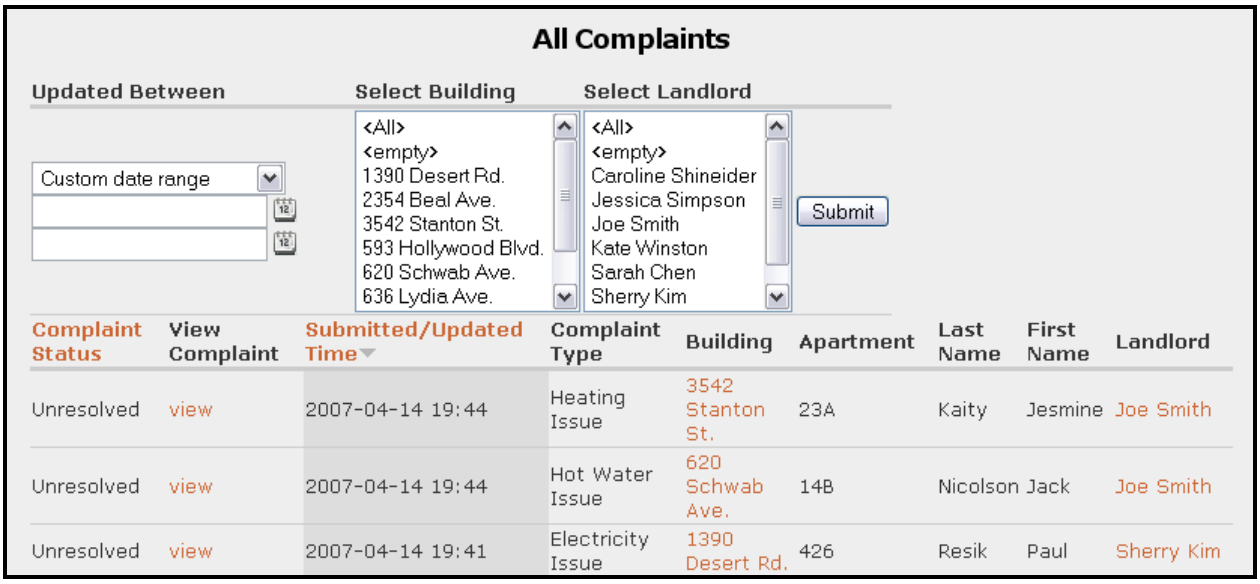
- This will log you into the site and give you more navigation options across the top.

Step Three: Navigate to GOLES Coordinator Reports

- Click on the GOLES coordinator reports link. This will take you to the GOLES Coordinator Reports screen.



- Click on the link for the type of report you would like to see. ("View all complaints" is the example used)



All Complaints

Updated Between: Custom date range

Select Building: <All>, <empty>, 1390 Desert Rd., 2354 Beal Ave., 3542 Stanton St., 593 Hollywood Blvd., 620 Schwab Ave., 636 Lydia Ave.

Select Landlord: <All>, <empty>, Caroline Shineider, Jessica Simpson, Joe Smith, Kate Winston, Sarah Chen, Sherry Kim

Submit

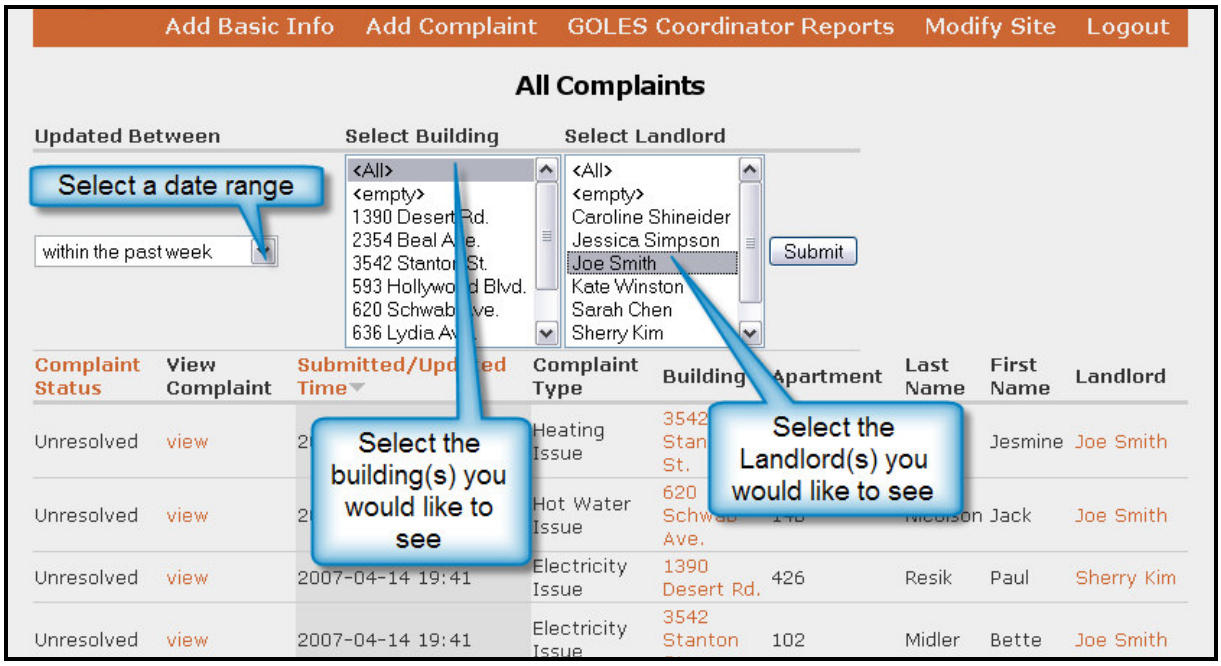
Complaint Status	View Complaint	Submitted/Updated Time	Complaint Type	Building	Apartment	Last Name	First Name	Landlord
Unresolved	view	2007-04-14 19:44	Heating Issue	3542 Stanton St.	23A	Kaity	Jesmine	Joe Smith
Unresolved	view	2007-04-14 19:44	Hot Water Issue	620 Schwab Ave.	14B	Nicolson	Jack	Joe Smith
Unresolved	view	2007-04-14 19:41	Electricity Issue	1390 Desert Rd.	426	Resik	Paul	Sherry Kim

- Specify a date range using the dropdown menu, and select either a building address or landlord name, and click "submit".

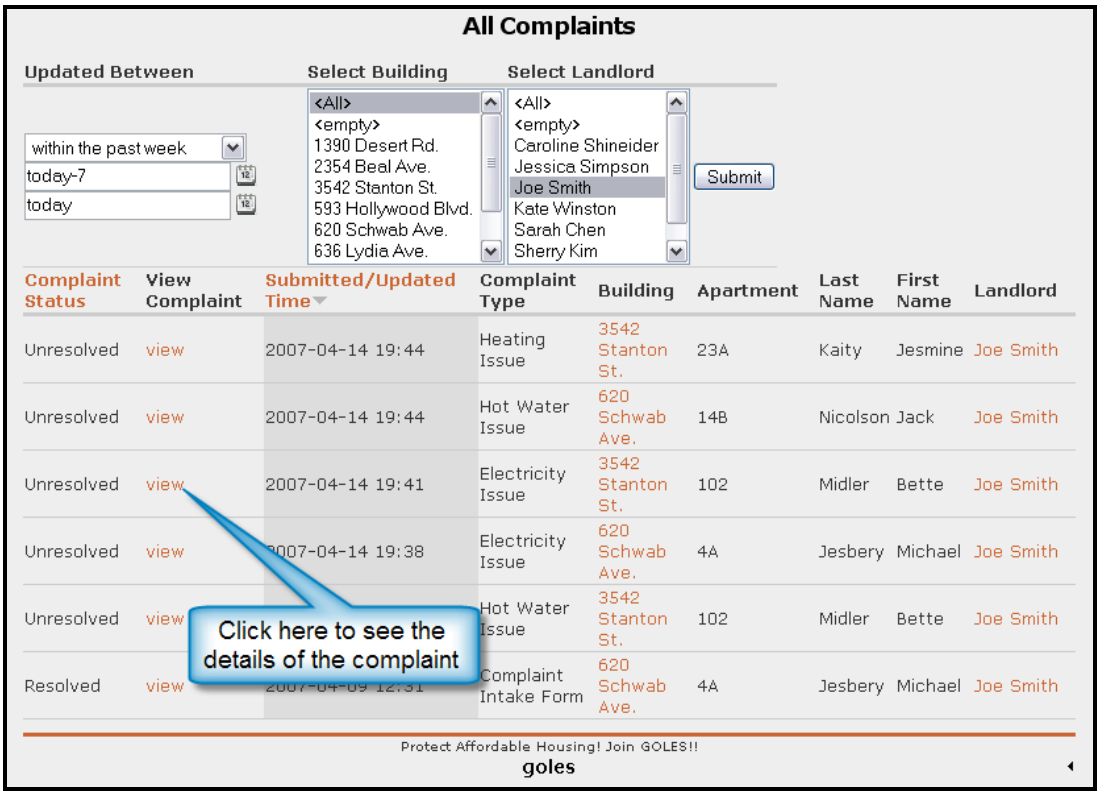
  Note: *You may select more than one item in the list using the following:*

  PC – Hold down the CTRL key while you click on each of the items you would like to add.

  Mac – Hold down the Apple Command Key ⌘ and click on each of the items you would like to add.



- This will cause the results to be filtered accordingly.

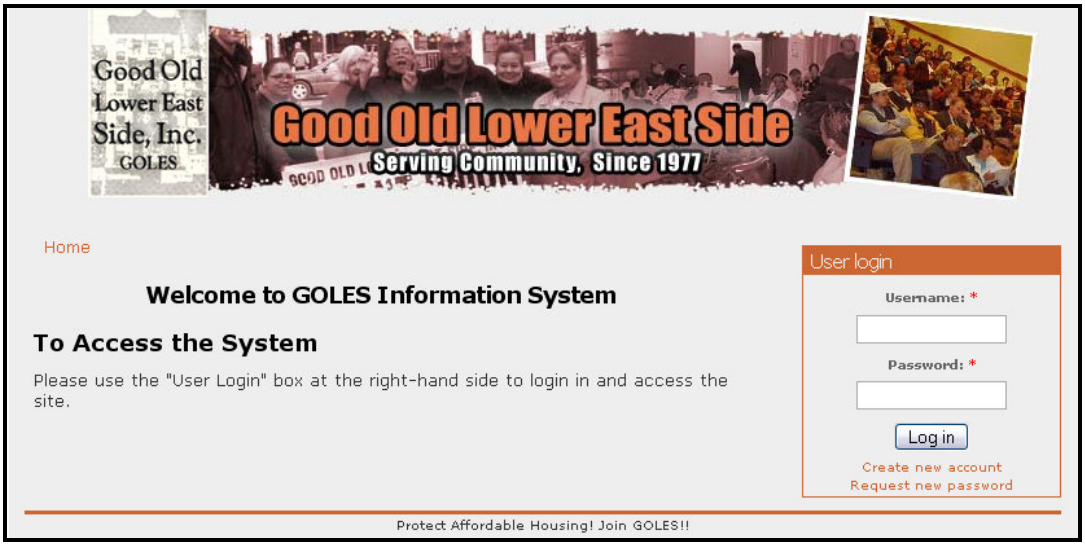


- Click on the "view" link for any of the individual records to see the full form information.

Section Five: How Do I … Modify the Questions in the Forms?

Step One: Navigate to the GOLES Complaint System site

- Direct your browser to http://golesproject.openflows.org/login



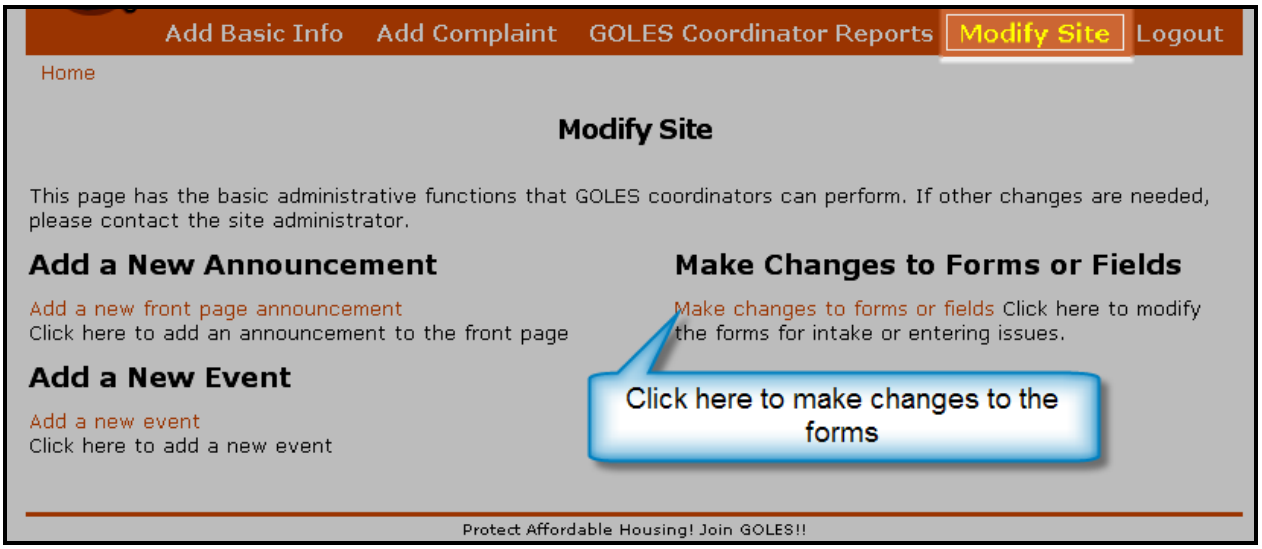
Step Two: Log In

- Enter your username and password in the login box (provided separately) and click on the "Log in " Button

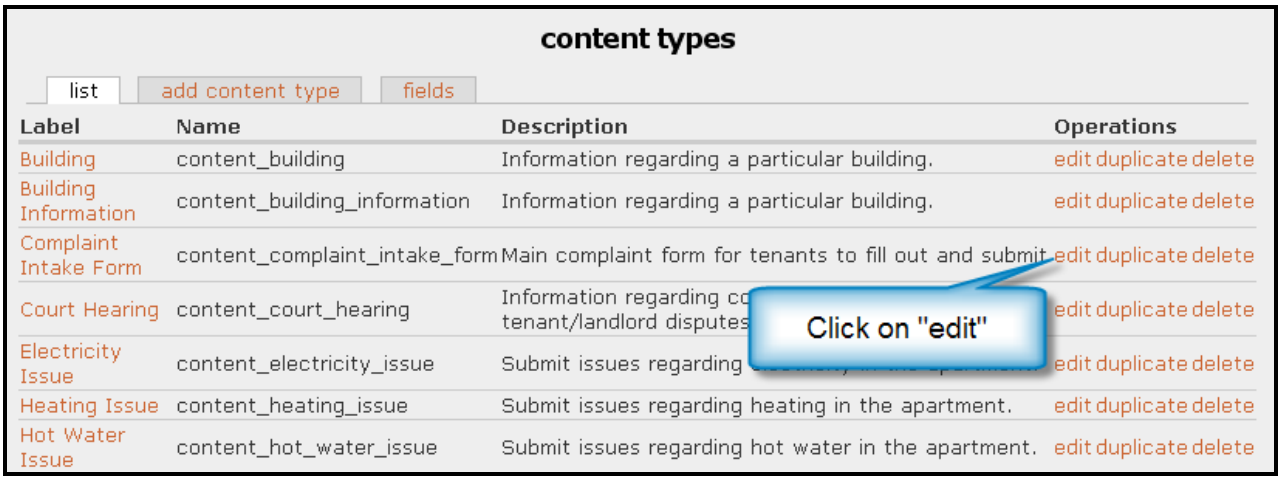
- This will log you into the site and give you more navigation options across the top.

Step Three: Navigate to Modify Site and choose the appropriate link

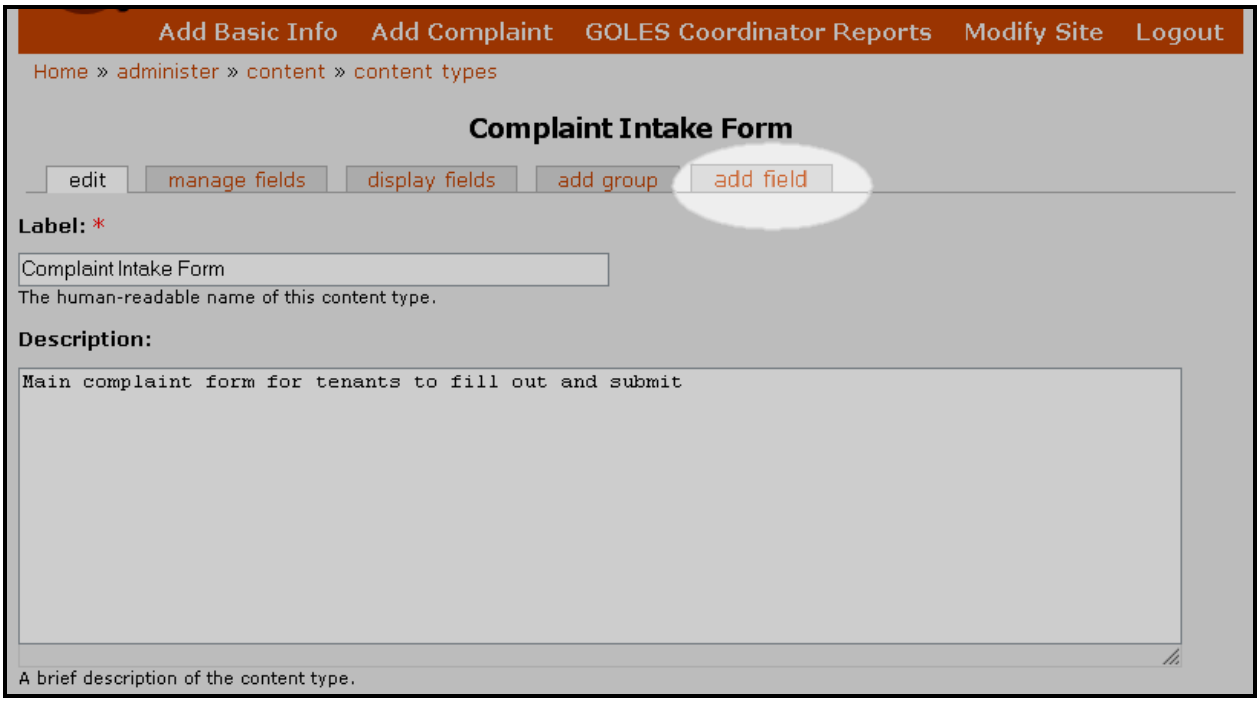
- Click on the Modify Site link in the top navigation bar
- Under "Modify the Forms" click on the "Make changes to forms or fields" link. This will take you to the "content types" page.



- On the "list" tab, choose the form that you would like to edit by clicking on the "edit" link (complaint intake form used as example)



- This will take you to the following screen (or similar if editing a different form).

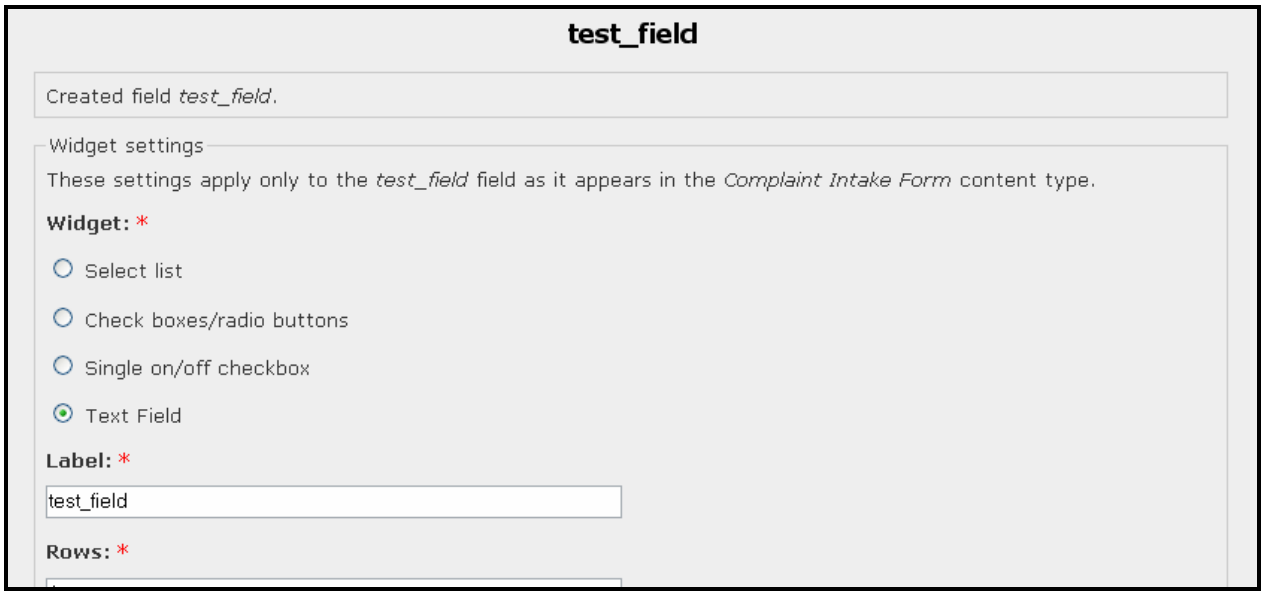


- To add a new field:
  - Click on the "add field" tab
  - This will take you to the "Add field" page. Here you have the option to add an existing field (one already in use on another form) or to create a new field.

- In the name field, enter the name for this new field. This will only be used by the computer, but it will be best to name these in a descriptive fashion, so that you will know what they refer to in the future *(Note: you may not use spaces. Instead, a good practice is to use an underscore _ to separate words*).

- In the "Field Type" section, choose the type of field you would like. These will most commonly be text, integer (whole numbers), or date fields.

- Click on the "Create Field" button. This will take you to a page with a lot more options. You will not have to make many changes here.

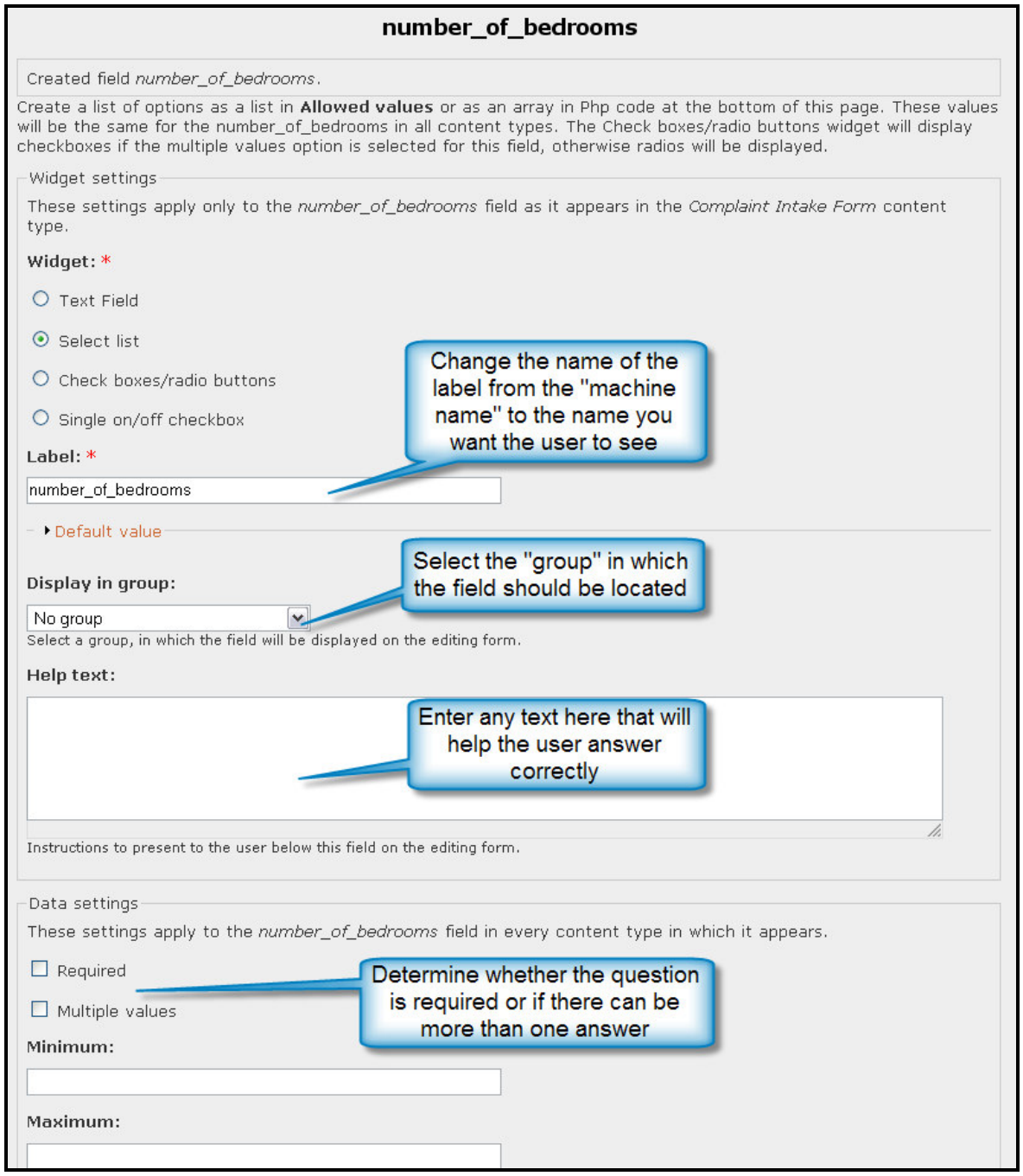


- Change the "Label" to from the machine name (that you gave it in the previous step) to the name you would like to display on the form.

- Choose whether you would like the field to appear in a "group". Groups are sections of the page that have fields about the same topics in them.

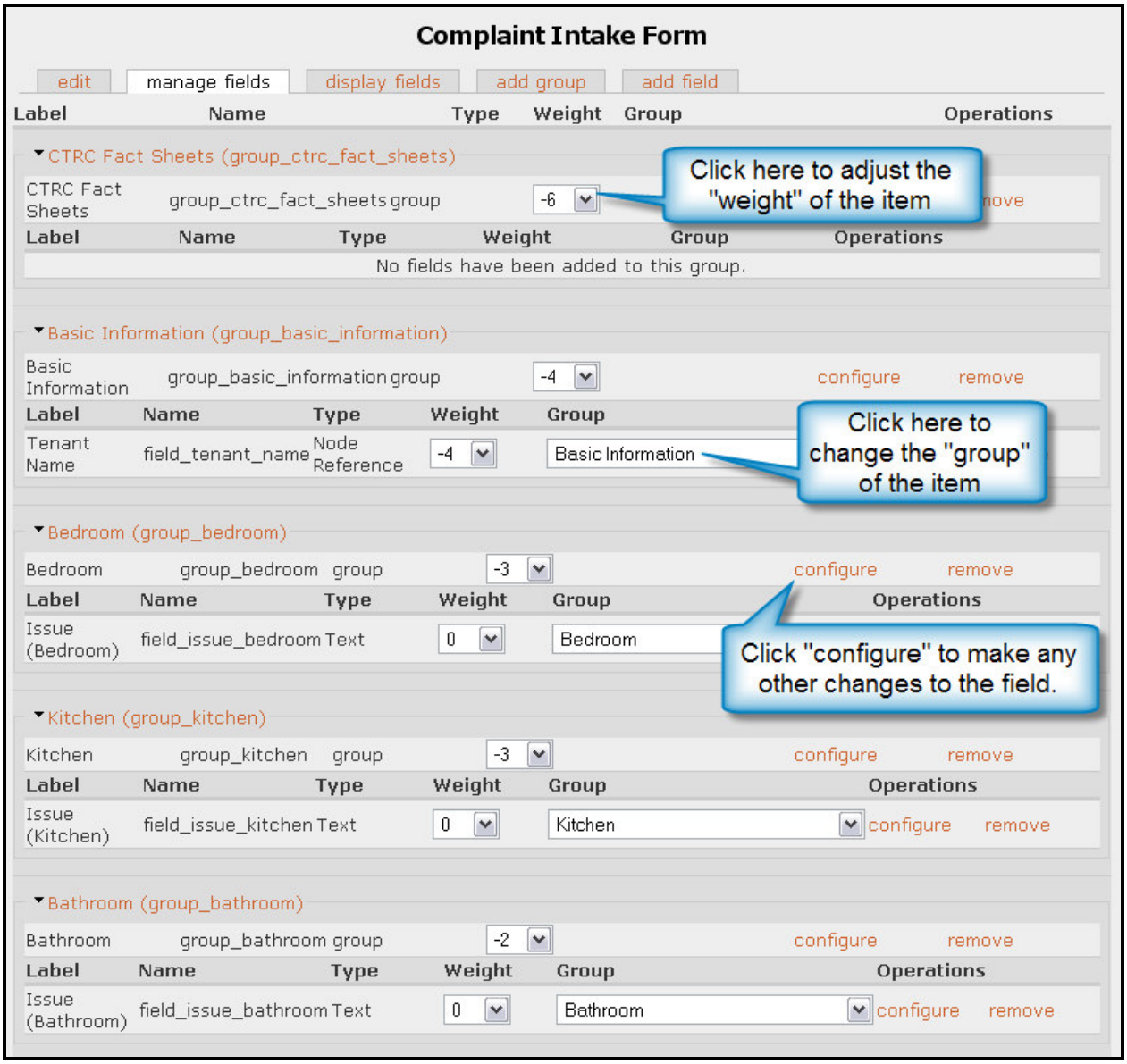
- In the "Help Text" section, enter any instructions for the user

- Scroll down to the "Data Settings" section. Here you have the following options:
    - Choose whether you would like to require the field
    - If you choose, a maximum length for a text field can be set here.



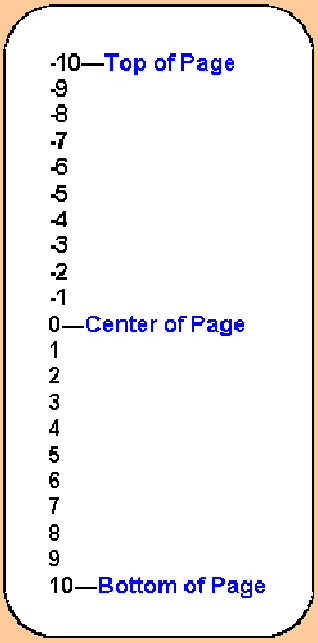
- Click on the "Save Field Settings" button.

- To modify a field:
  - Click on the "Manage fields" tab. This will take you to a list of all of the fields in the current form.



  - Here you have the following options:
    - *Change the weight:* The weighting feature is used to order fields on the page. Generally, the lower the number, the lighter the weights, making this field appear higher up on the page. See the note below for a better explanation.

NOTE:
In website creation, a "weight" refers to where an item will be located on a web page. Zero is considered a "normal" weight. Any numbers less than that (negative) are displayed above the "normal" items, and any numbers greater that that (positive) are displayed below the "normal".



For example the following information:

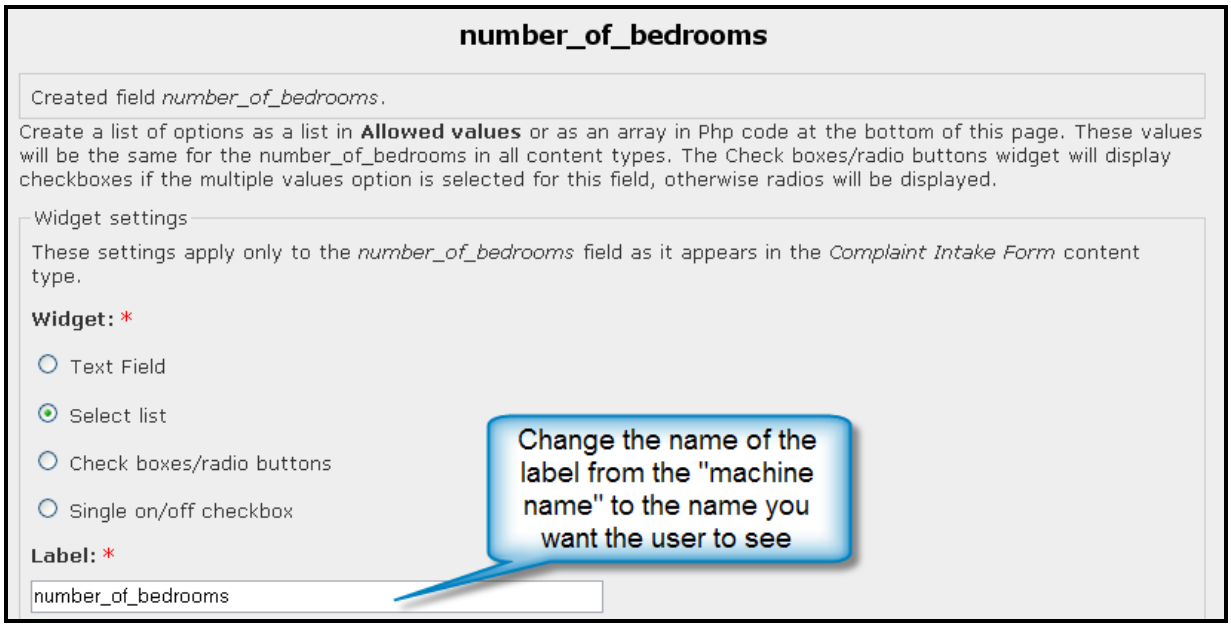
Welcome Message: -1
Picture: 1
Important Message: -3
Basic Information: 0

would be displayed in the following order:

Important Message
Welcome Message
Basic Information
Picture

- *Change the Group:* The "group" feature allows you to change where a field appears in the form as a part of a specific grouping. In this site, the "group" refers to the section of the page that the field should go into. For instance, if the field is "number of bedrooms" it should be put into the "bedroom" group.

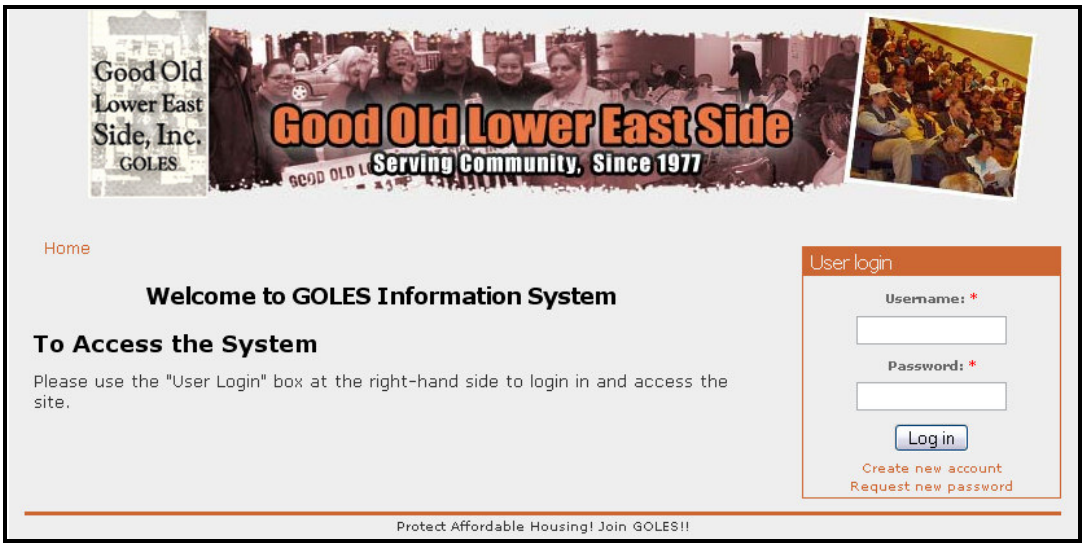
- To make changes to other aspects of the field (display type, label, help text, allowed values, etc.) click on the "configure" link. This will take you to the specific field's settings, where you can make changes as necessary. (For more help, see the "Add a field" section above).



Section Six: How Do I … Add Announcements or Events?

Step One: Navigate to the GOLES Complaint System site

- Direct your browser to http://golesproject.openflows.org/login



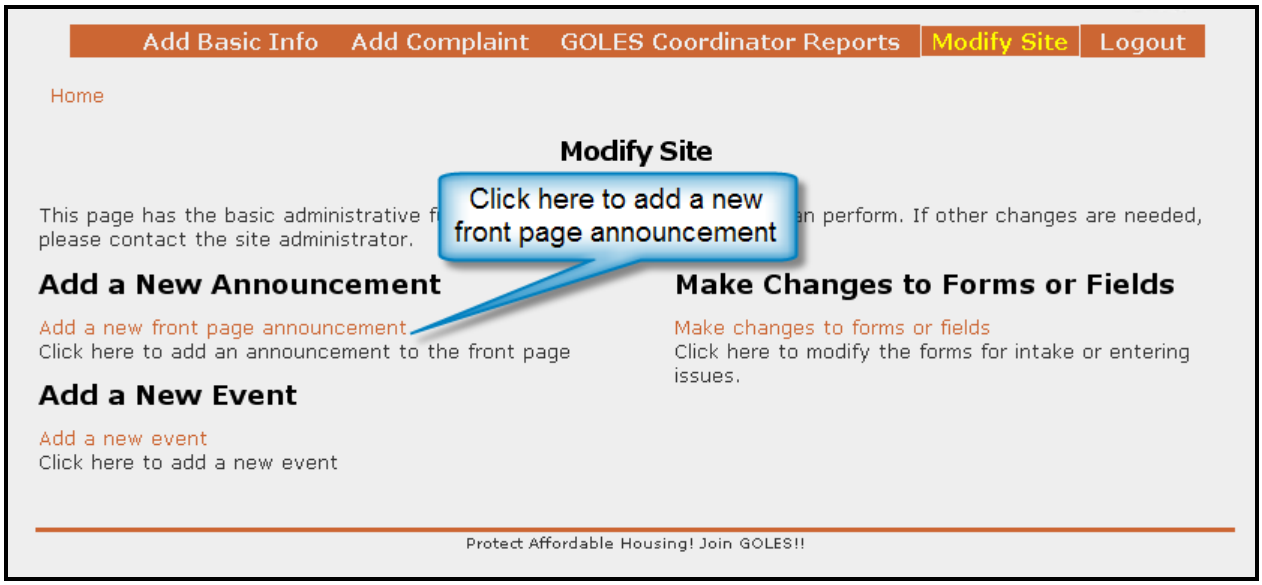
Step Two: Log In

- Enter your username and password in the login box (provided separately) and click on the "Log in " Button

- This will log you into the site and give you more navigation options across the top.

Step Three: Navigate to Modify Site and choose the appropriate link

- Click on the "Modify Site" link in the top navigation bar



- To add a new announcement:
  - Click on "Add a new front page announcement". This will take you to the "Submit Story" page.

- Give the announcement a title, and enter the text in the "Body" textbox. (note: for more formatting options, click on the "enable rich text" link)

- Click "Preview" to preview your announcement or "Submit" to post it to the site.

- The post will appear on the front page under the welcome post.

Add Basic Info | Add Complaint | GOLES Coordinator Reports | Modify Site | Logout

Welcome to the GOLES Website and Complaint Support System

Hello everyone, welcome to the new GOLES website! For more information about GOLES and our campaigns, please use the links on the right.

If you need assistance, please **call us at (212) 533-2541** to set up an appointment.

GOLES coordinators will use the site for announcements and to publicize events, so check it often!

Sign up now for free classes to LES residents

Sign up now for free classes to LES residents on Customer Service Skills in the food industry as part of our new Workforce and Economic Developm Program. Acquire the skills you need to get the job you want!

For more information call Ginny at 212-533-2541.

The new announcement appears on the front page

Public Forum May 5th

Submitted by admin on Sun, 2007-04-15 23:32.

Start: 2007-05-05 11:00

End: 2007-05-05 12:00

Timezone: Etc/GMT-5

Public Forum May 5th Public Forum to end rent destabilization, reform DHCR, preserve Mitchell Lama and Section 8 housing, ensure adequate state funding for NYCHA and limit rent payments from people living with HIV/AIDS to 30% of income.

Join GOLES and other community groups as part of the newly formed New York is Our Home Campaign, Saturday May 5th, 11AM, Middle Collegiate Church, 50 East 7th Street, between 1st and 2nd Avenues.

add new comment | calendar

Our 2nd Street Office has moved!

Please visit our new office at 171 Avenue B (next to our 169 Avenue B office)! Check out the latest Retail Action Project updates by clicking here.

GOLES Information

- About GOLES
- Campaigns and Services
- Contact GOLES
- Help Us/ Donate Now

Month

Apr 2007

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

add new comment

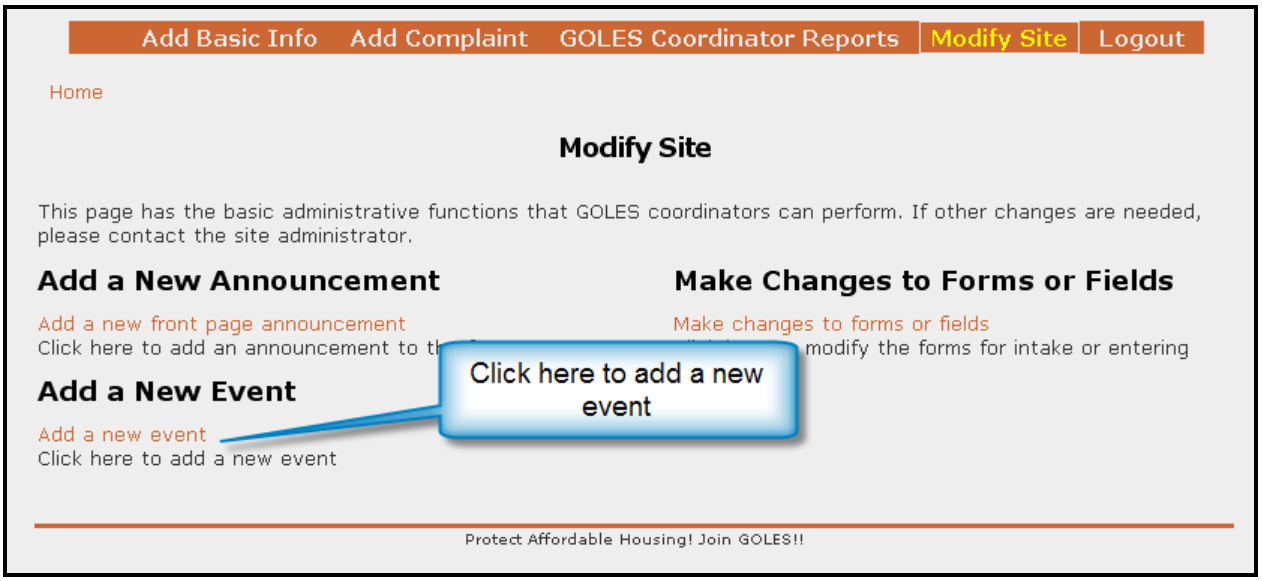
Protest

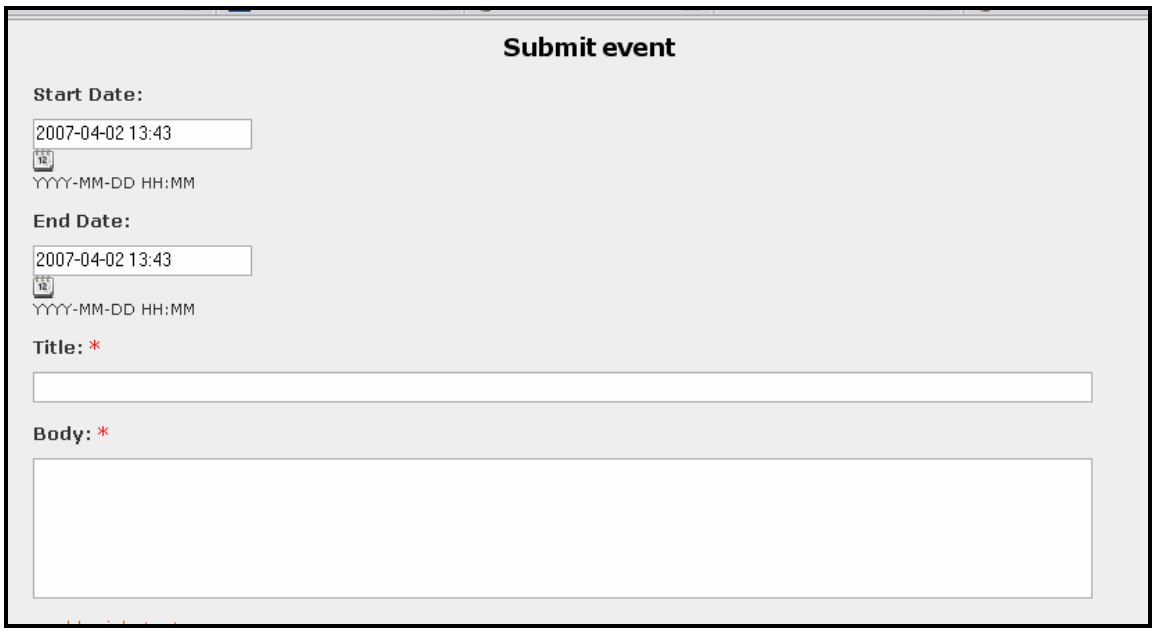
GOLES event

add new comment

Protect Affordable Housing! Join GOLES!!

- To add a New event:
    - Click on the "add a new event" link. This will take you to the "Submit event" page





    - Enter a Start date/time and an end date/time in the following format: YYYY-MM-DD HH:MM

    - Give your event a title in the title box, and enter any other supporting information in the "Body" box.

- Click on the "Preview" button to preview the event, or the "Submit" button to post the event.
- The Event will be shown on the home page:

GOLES Complaint System Site Administrator Manual

SI 631—Content Management Systems

Rebecca Carter

Nisha Erinjeri

David Hsiao

Cheng-Lun-Li

GOLES Complaint System–Site Administrator Manual

The following document details some of the modules and settings used in the creation of the GOLES website. A complete list of the modules used can be found at the end of this section.

MENUS 3
Add a menu 4
Add a menu item 5
Change current menu settings 7

BLOCKS 8
Add a block 9

Edit blocks 10
To enable a block (make it shown) 10
Change block position 10
Change block item order 10

CCK MODULE 11

To add new content type 12

To edit content types 13
To add a new field 14
To manage an existing field: 15

VIEWS 16
Add/ edit a view 17

VIEWS FUSION 20

How does Views Fusion work? 20
Adding a Views Fusion 22
Deleting Fused Views 24
Views Fusion in Action 25

Original View to be fused 25

PANELS 26
Creating a New Panel 28
Edit Existing Panel 30
Delete Content within a Panel 31

WORKFLOW 32
Add Workflow 33

Add States 34
Edit Workflow / Setup Transition 36
Assign Actions (Optional) 37
Mapping Workflow to Content Types 38

COMPLETE LIST OF MODULES USED IN GOLES COMPLAINT SYSTEM 39

CCK MODULES 39
Computed Field 40
Date 40
Phone 41

VIEWS 41
Calendar module 42
Views Date Range Filter 42
Views_fastsearch 43

Event 43

Workflow 44
Workflow fields 44

Action 45

TinyMCE Module 46

Panels 46

Views Fusions 46

Menus

The Menu Module is built in the core Drupal module. It provides users the option to define the site's navigation system

Setting menus allows users to cluster options create hierarchy of them. Users can modify navigation scheme through menus settings.

Basic actions in menu setting are:

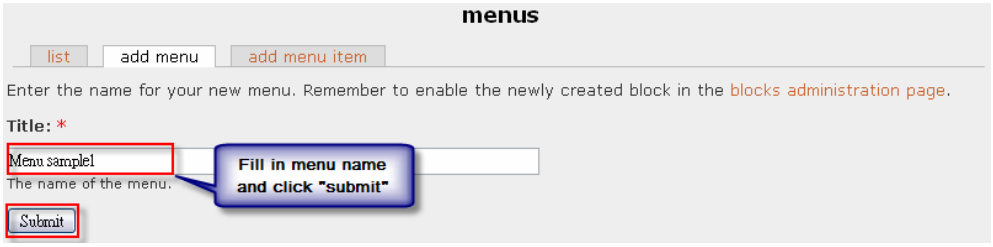
- Edit menus
    - Add a menu
    - Add menu items
    - Edit menu items
    - Edit current menu

Add a menu

To add a menu, site administrator should go to [Administer -> menus -> add menu]

Step 1: Click on add menu in menu setting

Step 2: Fill in menu name and click on "Submit"



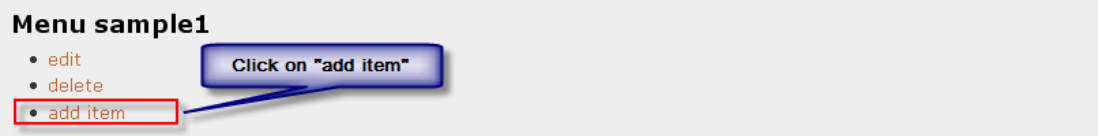
Step 3: You'll see the new menu shown in the list

Add a menu item

To add a menu item, site administrator should go to [Administer -> menus]

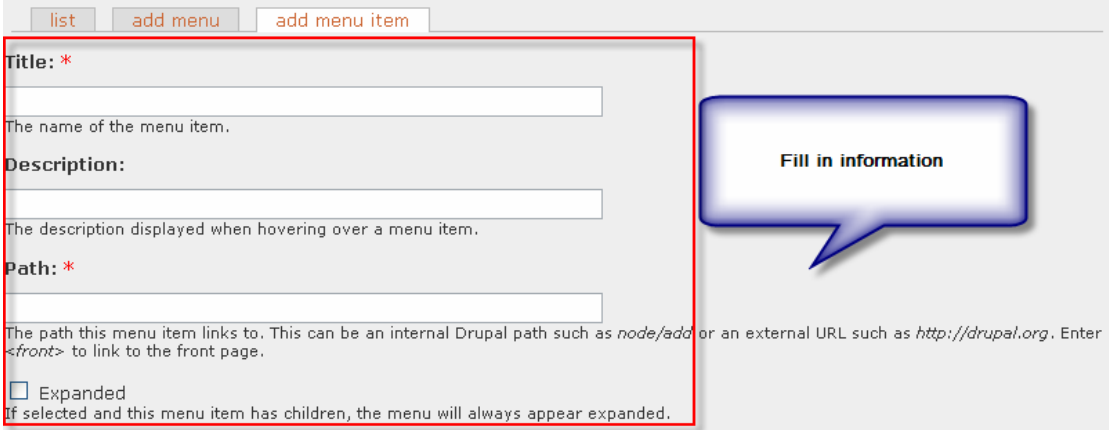
Step 1

Click on "add item" under the menu you want to edit



Step 2

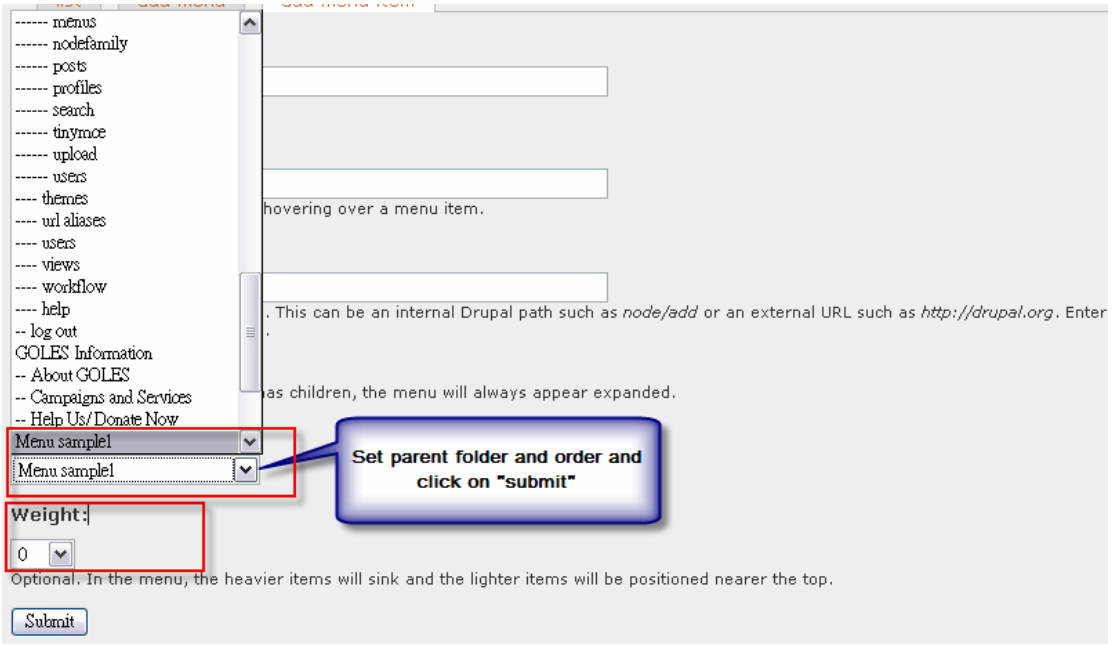
Fill in item description



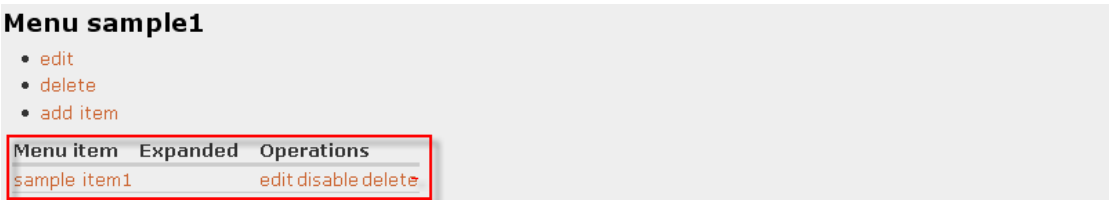
*The path creates a link for the block. For example, insert /node/sampleblock to make the block shown at http://golesproject.openflows.com/node/sampleblock. Or just put <*front*> to make it appear at homepage.

Step 3:

Set menu hierarchy through selecting parent menu.
Set the order of item through weight (0 is higher than 1)



Step 4:
New item shown under the edited menu

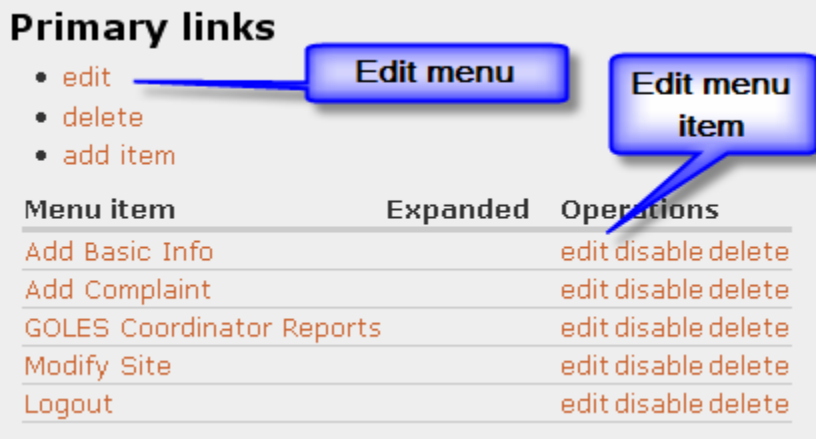


Item shows up in the menu.

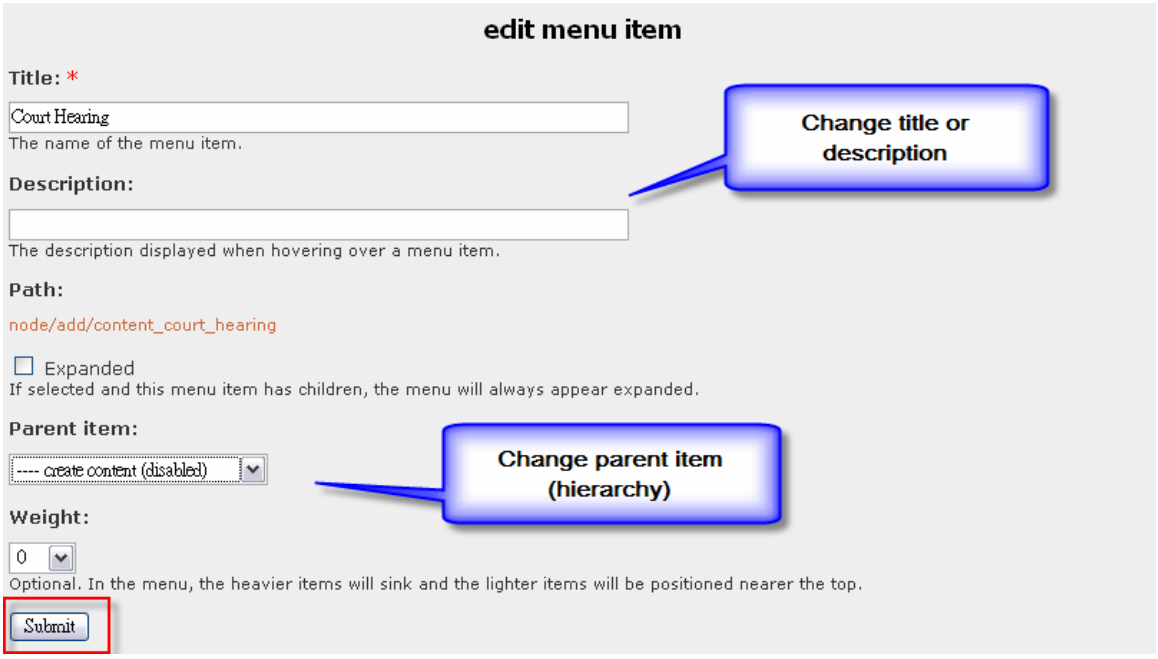
Change current menu settings

To change setting of existing menu, site administrator should go to [Administer -> menus]

Step 1:
Find menu and click on edit



Step 2: Change item information



Step 3: Click on "Submit"

Blocks

Setting a block in Drupal allows users to modify the look of the site. Users are able to move blocks by setting their positions. This saves the time it takes to edit html or CSS codes.

Currently enabled blocks:

Blocks (enabled):

Location	Name	Enabled
Footer	Navigation	Yes
Right sidebar	GOLES Information User login Calendar List of upcoming events.	Yes Yes Yes Yes

Basic actions in block setting are:

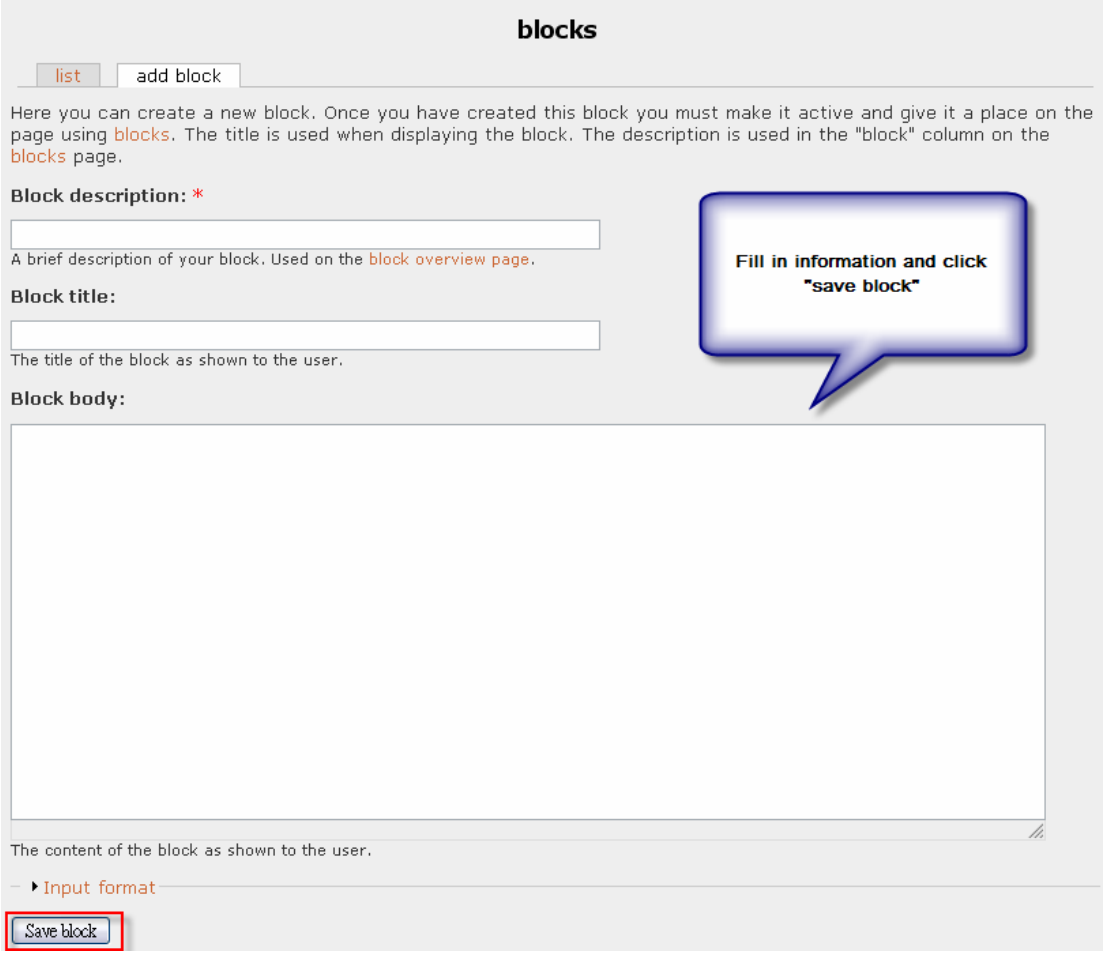
- Add a block
- Edit blocks
    - Enable a block
    - Change block position
    - Change block item order

Add a block

To add the block, site administrator should go to [Administer -> blocks]

Step 1: Click on "add block"

Step 2: Fill in description of the new block
Click on "save block"



Block sample shows on the block list.

Edit blocks

To enable a block (make it shown)

To enable a block, site administrator should go to [Administer -> blocks]

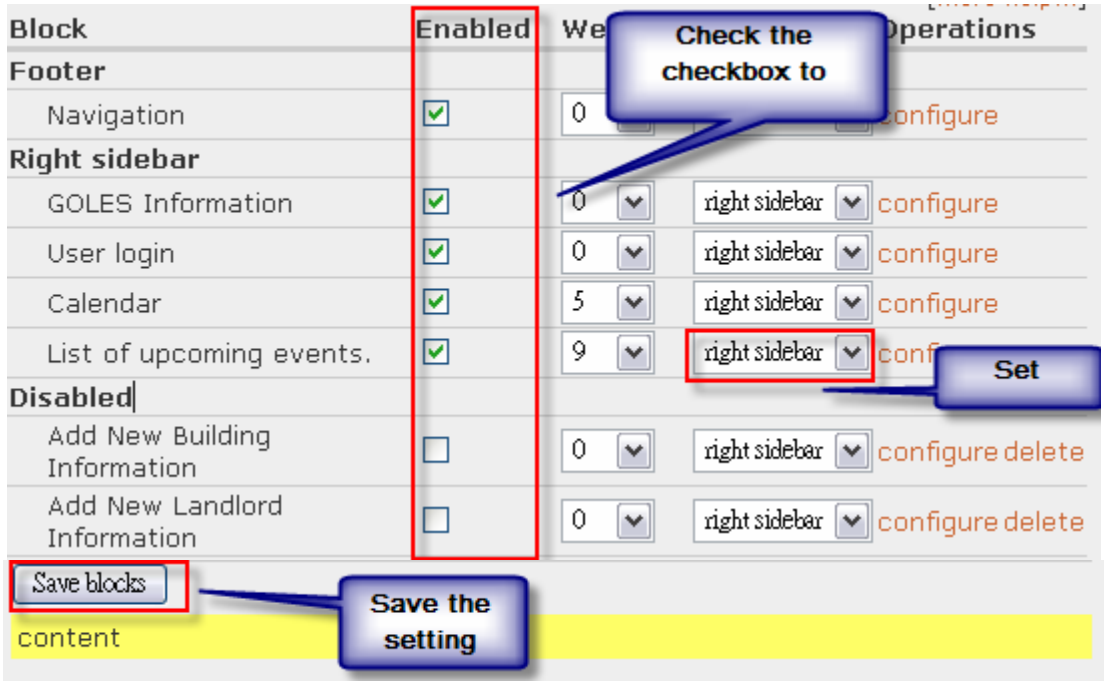
Step 1: Check the checkbox under column "Enabled" of the block.

Change block position

Step 1: Set the position of the block by selecting sidebar value under "Placement" column

Change block item order

Step 1: Set the block order by selecting weight value under "Weight" column



Step 3: Click on "Save blocks"

CCK Module

Content Construction Kit allows you create and customize fields using a web browser. The 4.7x version of CCK creates custom content types and allows you to add custom fields to them. In Drupal 5.x custom content types can be created in core, and CCK allows you to add custom fields to content types.

Current content types and their fields:

Building Information	Complaint Intake Form	Electricity Issue	Landlord Information	Tenant Information
Street Address	CTRC Fact Sheets (filled)	Tenant Name	Main Contact	First Name
Number of Apartment	Tenant Name		Organization	Last Name
Number of Resident	Issue - Bedroom		Street Address	Building
Year Built	Issue- Kitchen		City	Apartment Number
Year Last Remodeled	Issue – Bathroom		State	Phone Number
	Issue – Entire Apartment		Zip Code	E-Mail
	Issue – Livingroom		Phone Number	Current Monthly Rent
	Issue – Public Areas		E-Mail	Date Moved In
	Issue – Legal Claim			Number of Rooms

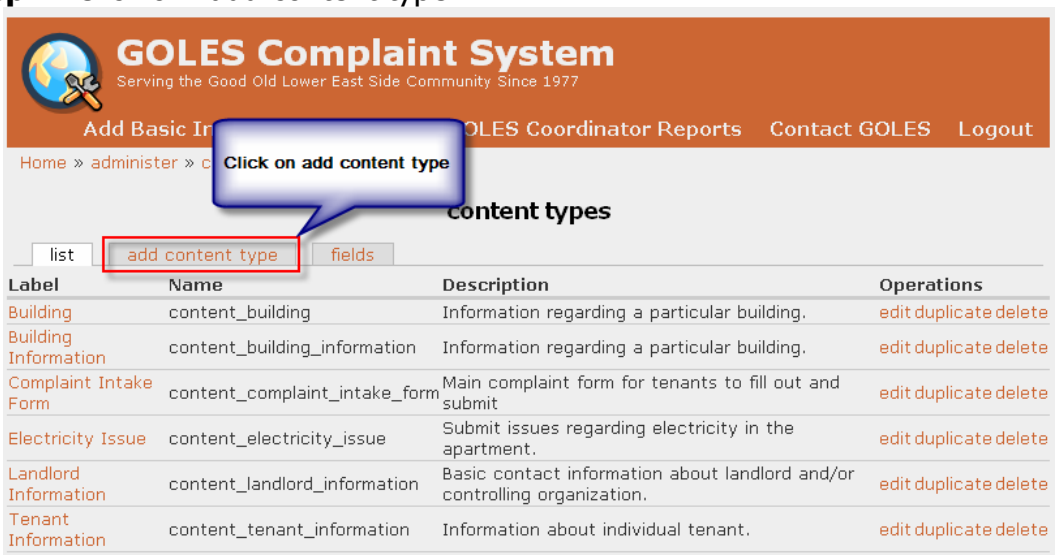
Basic actions in content type settings are:

- Add a content type
- Edit content types
    - Add a field
    - Manage existing field

To add new content type

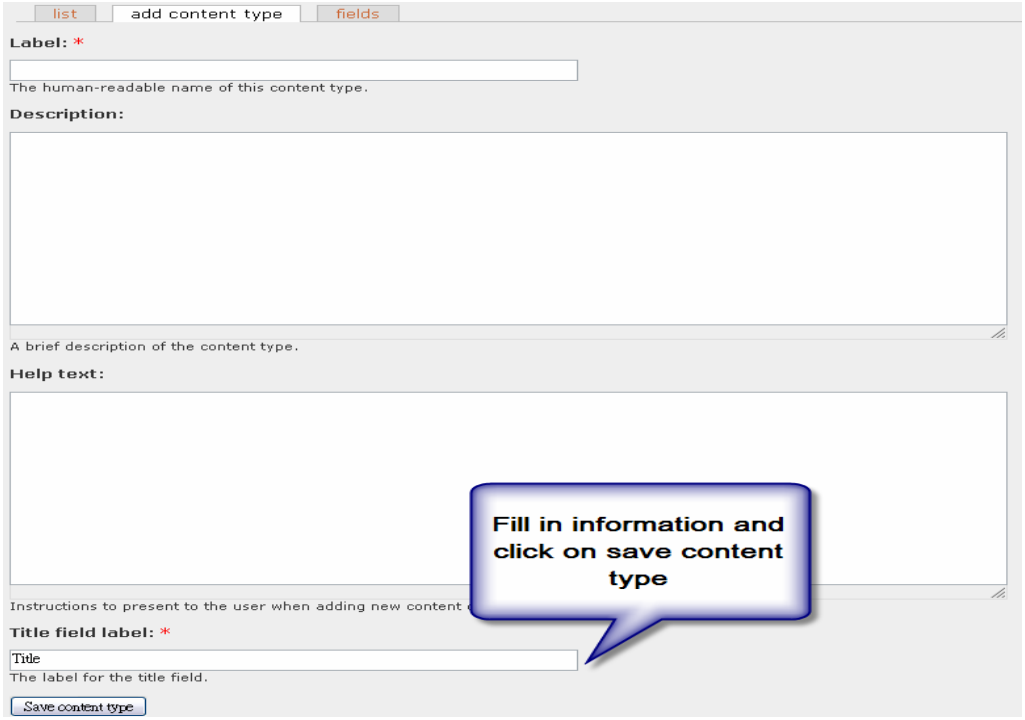
To add a menu item, site administrator should go to [Administer -> content -> content types]

Step 1: Click on "add content type"



Step 2: Fill in information of the type

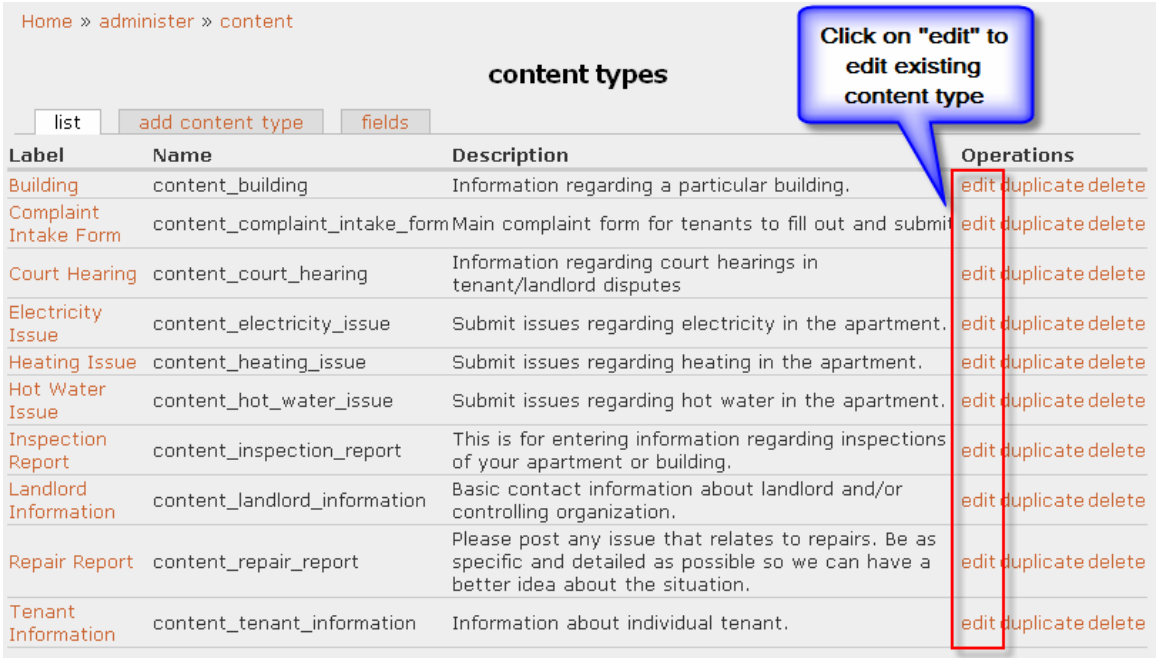
Note: "Title field label" is used for node reference



To edit content types

To add a content type, site administrator should go to [Administer -> content -> content types]

To edit content type, click on the "edit" link of the content type

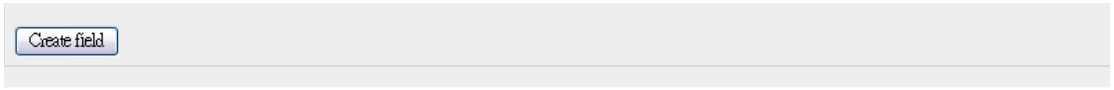


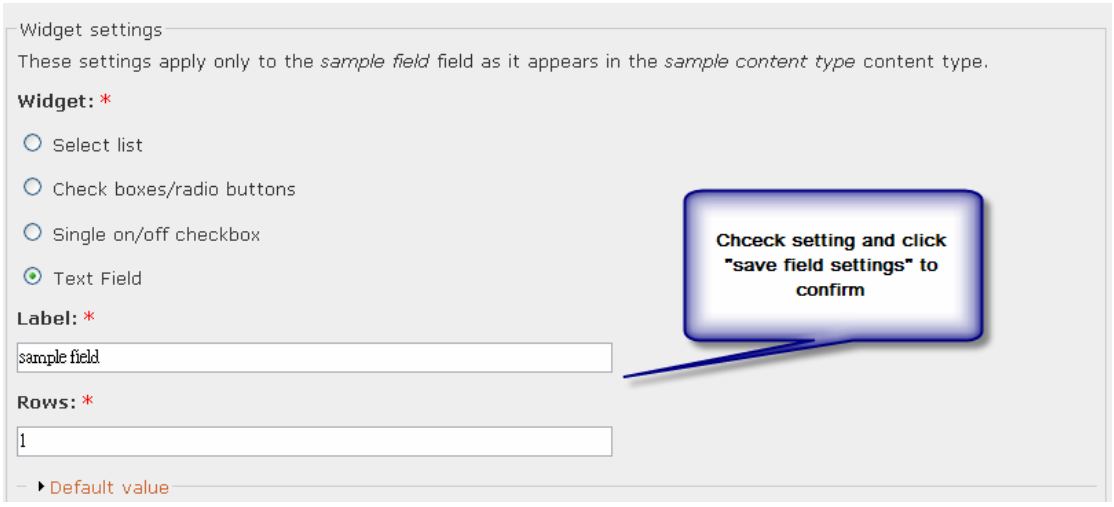
Label	Name	Description	Operations
Building	content_building	Information regarding a particular building.	edit duplicate delete
Complaint Intake Form	content_complaint_intake_form	Main complaint form for tenants to fill out and submit	edit duplicate delete
Court Hearing	content_court_hearing	Information regarding court hearings in tenant/landlord disputes	edit duplicate delete
Electricity Issue	content_electricity_issue	Submit issues regarding electricity in the apartment.	edit duplicate delete
Heating Issue	content_heating_issue	Submit issues regarding heating in the apartment.	edit duplicate delete
Hot Water Issue	content_hot_water_issue	Submit issues regarding hot water in the apartment.	edit duplicate delete
Inspection Report	content_inspection_report	This is for entering information regarding inspections of your apartment or building.	edit duplicate delete
Landlord Information	content_landlord_information	Basic contact information about landlord and/or controlling organization.	edit duplicate delete
Repair Report	content_repair_report	Please post any issue that relates to repairs. Be as specific and detailed as possible so we can have a better idea about the situation.	edit duplicate delete
Tenant Information	content_tenant_information	Information about individual tenant.	edit duplicate delete

To add a new field

Step 1: Click on "add field":

Step 2: Select field type and click on "create field"



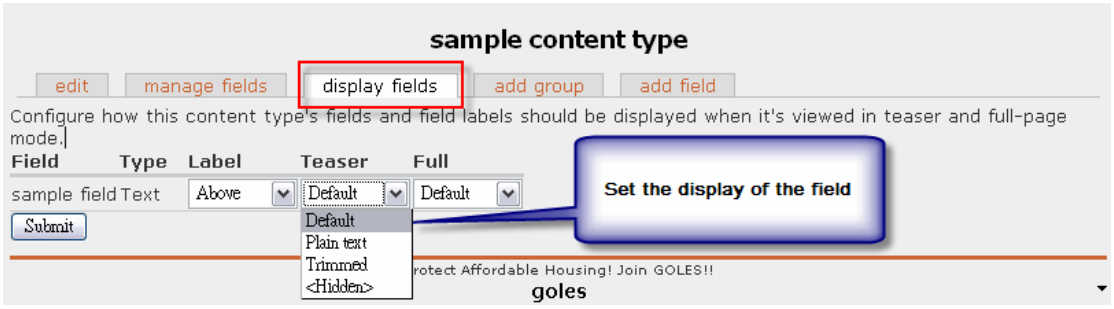


Step 3: Click on "save field settings"

To manage an existing field:

Step 1: In the edit mode, click on "manage fields"

Step 2: Click on "display field" to set the display of the field



Step 3: Click on "Submit"

Views

Views module creates customized views of node lists.
The views module provides a flexible method for Drupal site designers to control how lists of content (nodes) are presented. Traditionally, Drupal has hard-coded most of this, particularly in how taxonomy and tracker lists are formatted.

Basic actions in views settings are:

- Add a view
- Edit existing view

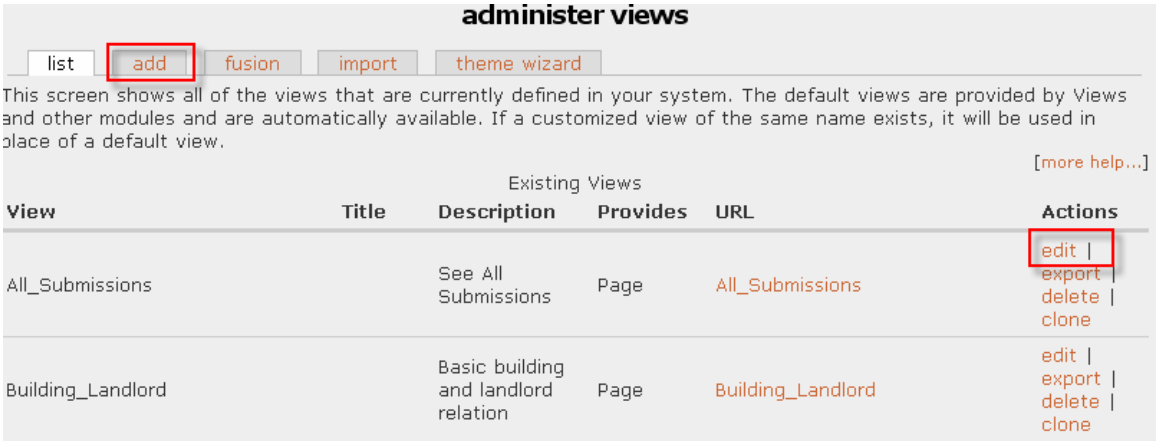
Current views settings

View Title	Description	URL
All_Submissions	See All Submissions	All_Submissions
Building_Landlord	Basic building and landlord relation	Building_Landlord
Building_List	List of buildings	Building_List
Building_List2	List of buildings2	Building_List2
calendar	Calendar view of any date field	calendar
calendar_Complaint_Intake	Calendar view of complaint intake submitted	calendar_complaint_intake
calendar_Court_Hearing	Calendar view of court hearing dates	calendar_court_hearing
Complaints_by_BuildingWideIssues	Select complaints filtered by building-wide issues	Complaint_by_BuildingWide Issues
Complaint_ALL	Select complaint by building and/or landlord	Complaint_ALL
Complaint_Electricity	Electricity Issues	Complaint_Electricity
Complaint_Heating	Heating Issues	Complaint_Heating
Complaint_HotWater	Hot Water Issues	Complaint_HotWater
Complaint_Intake	Main view for Complaint Intake Form	Complaint_Intake
Court_Hearing	Cout Hearing Details	court_hearing
Filed_311_Without_Action	View filed 311 complaints without action	filed_311_no_action
Image_Block		No Page View
Inspection_Reports	List of Inspection Reports	Inspection_Reports
Landlord_Info	Information about Landlord	Landlord_Info
Landlord_List	List of landlords	Landlord_List
Landlord_List2	List of landlords2	Landlord_List2
Repair_Report	List of Repair Reports Submitted	Repair_Reports
Tenant_Building	Tenant and Building Relation	Tenant_Building
Tenant_Info	View for Basic Tenant Information	Tenant_Info
Tenant_List	List of Tenants	Tenant_List

Add/ edit a view

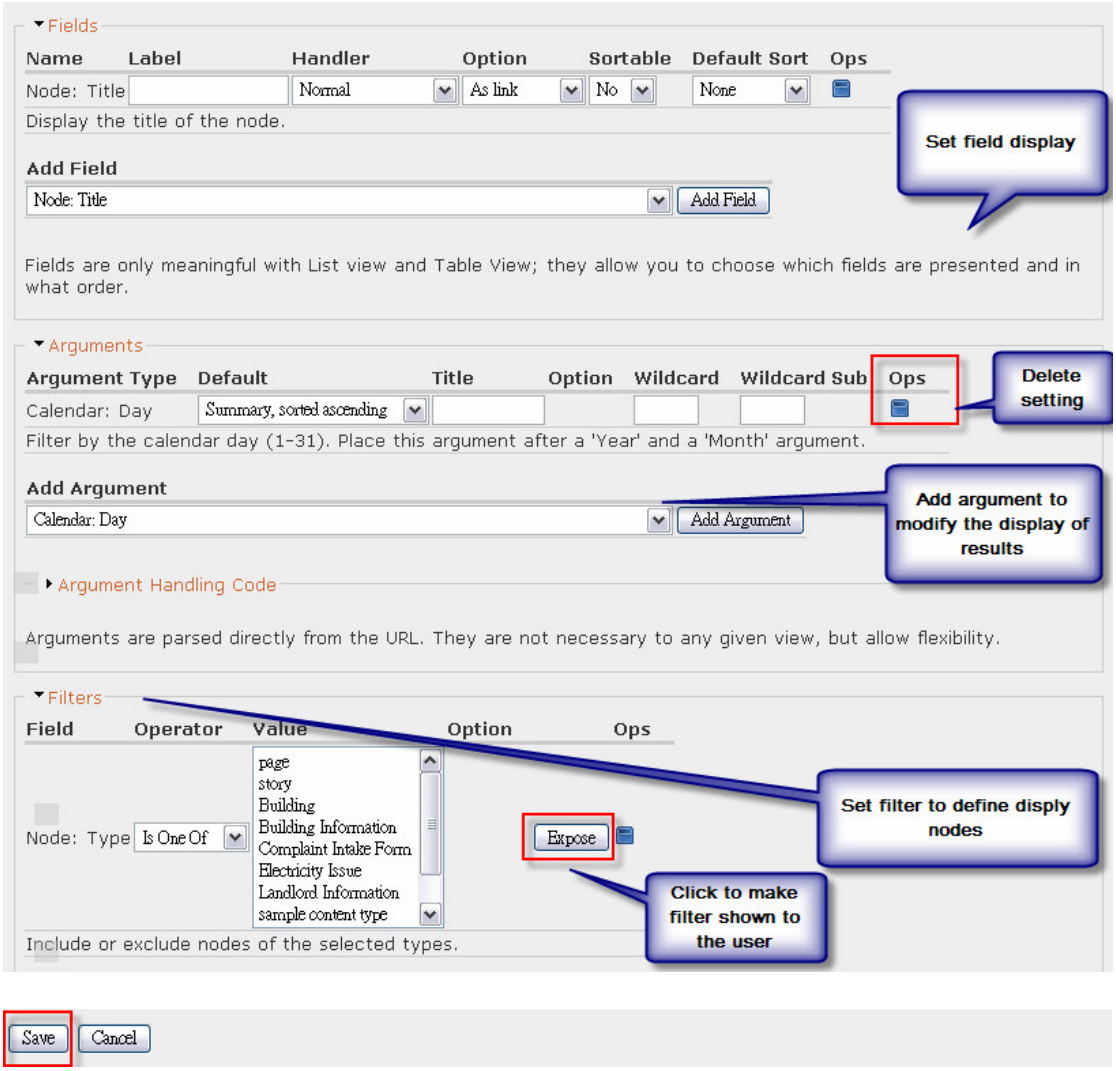
To add/ edit a view, site administrator should go to [Administer -> views]

Step 1: To add a view, click on "add" tab
To edit a view, click on "edit" link of the view you want to edit



Step 2: Fill in the information and setting options of the view

Title:
Set title
The title that be shown at the top of the view. May be blank. This title ignores arguments; if you
ents into account, use the "title" field in the arguments section.
Use Pager
If checked this query may be multiple pages. If not checked this query will be one page.
Breadcrumb trail should not include "Home"
If checked the breadcrumb trail for this page will discard "Home". Usually you will not set this, but this is used for the Front Page View, where it IS Home and should not leave a trail to itself.
Nodes per Page:
10
The number of nodes to display per page. If 0, all nodes will be displayed. If not using a pager, this will be the maximum number of nodes in the list.
Header
Footer
Empty Text
Menu
Block
Provide Block
Set block display
If checked this view will be provided as a block. If checked title may not be blank.
View Type:
Full Nodes
How the nodes should be displayed to the user.
Title:
The title that will be shown at the top of the block. May be blank.
Nodes per Block:
If using a block, the maximum number of items to display in the block. Pagers are not used in blocks.



Step 3: After setting the views property, click on "save" bottun

Views Fusion

View Fusion allows one to fuse multiple views into one. With this module one can build fused views that display information storing in multiple nodes. This is especially useful for tabular views. It uses node relation or CCK node reference to join the appropriate nodes together.

How does Views Fusion work?

Views Fusion allows one to fuse (combine) multiple views into one. Administrator can build fusioned (combined) views that display information that is stored in multiple nodes, which are useful for tabular views. The original module uses node relations for joining the appropriate nodes together. For this system, however, a patch is applied so the administrator can fuse different views by "node reference" from different content types (CCK).
The basic idea is to join two different views with a "node reference" that connects them. For example, assuming that the system has node types of "CD" and "artist," where "CD" contains a node reference for artists. Next, create two tabular views. In one view, filter node type by "CD," and another one for "artist." In both tabular views, add fields that the system needs to display in both views (for "CD" view can be release date, album title, etc; for "Artist" view can be first and last name, date of birth, etc). Now let us fuse the artist view into the CD view so that we get a view of CDs containing their artists information. In this case we need to use CD view as primary view, with the view for artists as fused view by using the correct nodereference field in normal direction (not reversed). Then go to the page of the cd view, and this view will now become a fused view containing fields from both CD view and Artist view.

Current Fused Views

Primary view	Fused View	Using
Complaint_Intake	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
Complaint_Electricity	Tenant_Building	Node Reference: Tenant Name (field_tenant_name)
Tenant_Info	Landlord_Info	Node Reference: Building (field_building)
Complaint_ALL	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
Complaints_by_BuildingWideIssues	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
Landlord_List2	Building_List2	Node Reference: Landlord (field_landlord) - reverse direction
Filed_311_Without_Action	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
Court_Hearing	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
All_Submissions	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
Tenant_List	Building_Landlord	Node Reference: Building (field_building)
Repair_Report	Tenant_Info	Node Reference: Tenant Name (field_tenant_name)
Tenant_Building	Building_Landlord	Node Reference: Building (field_building)
Complaint_Heating	Tenant_Building	Node Reference: Tenant Name (field_tenant_name)
Complaint_HotWater	Tenant_Building	Node Reference: Tenant Name (field_tenant_name)
Inspection_Reports	Tenant_Building	Node Reference: Tenant Name (field_tenant_name)

Basic actions in views fusion settings are:

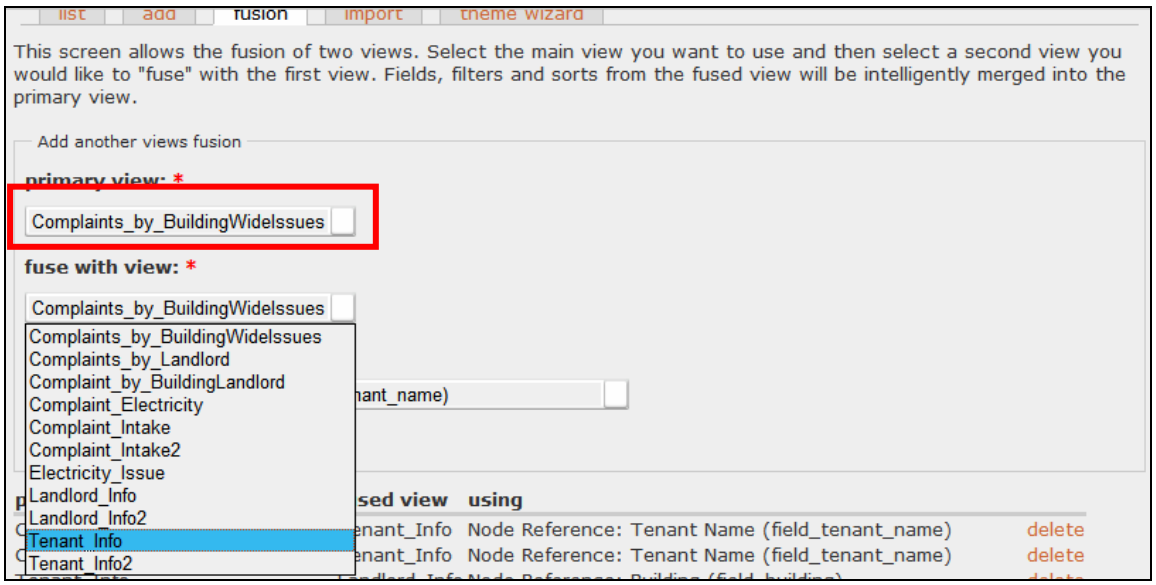
- Add fused views
- Delete fused views

Adding a Views Fusion

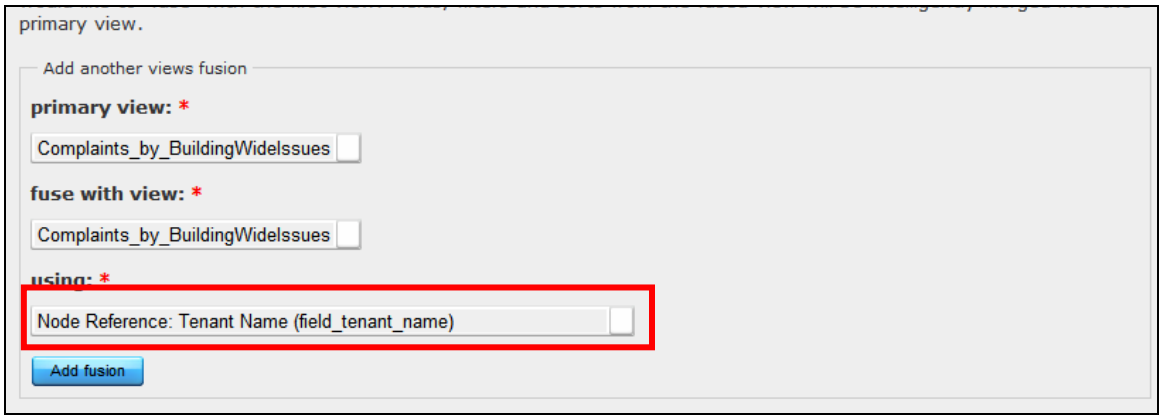
To add a views fusion, site administrator should go to [Administer -> views -> fusion]

Step 1: Click on "Fusion" tab

Step 2: Click on "Fusion" tab Choose Primary View and View to be Fused



Step 3: Choose how to connect the two views

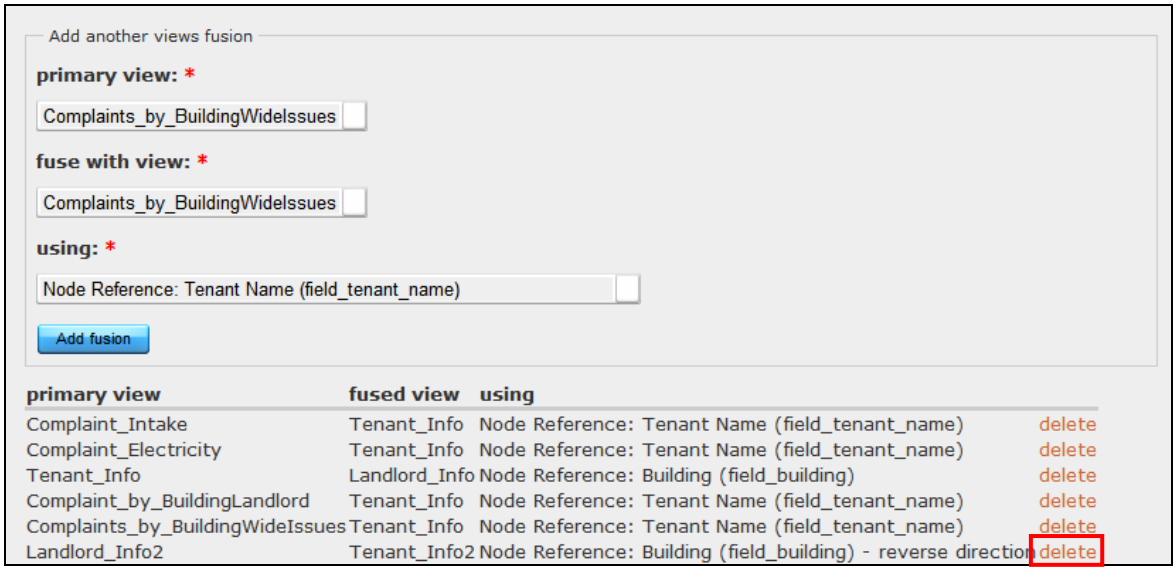


Step 4: Click "Add fusion"

Deleting Fused Views

To delete a views fusion, site administrator should go to [Administer -> views -> fusion]

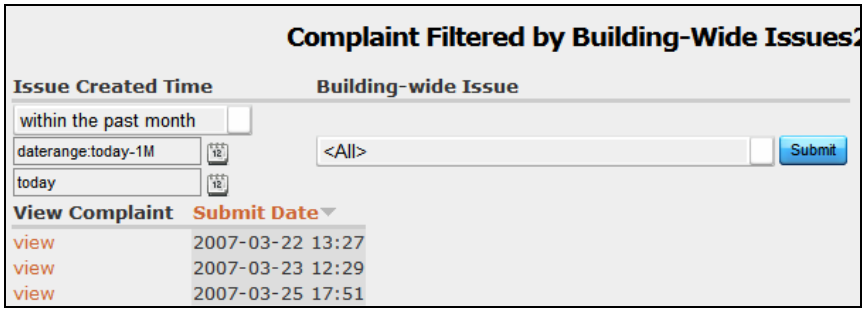
Step 1: Click on "delete" to remove views fusion between views



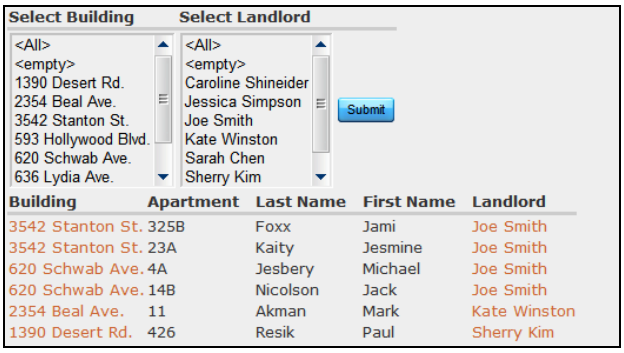
Views Fusion in Action

The concept of utilizing views fusion.
Basically, the views fusion contains both fields of original views. Users can decide whether to show all the fields or not

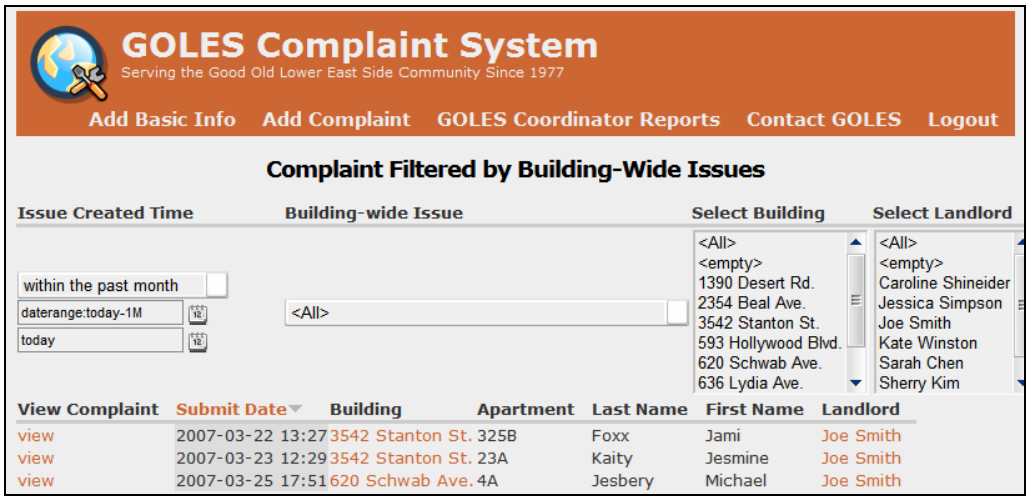
Original Primary View



Original View to be fused



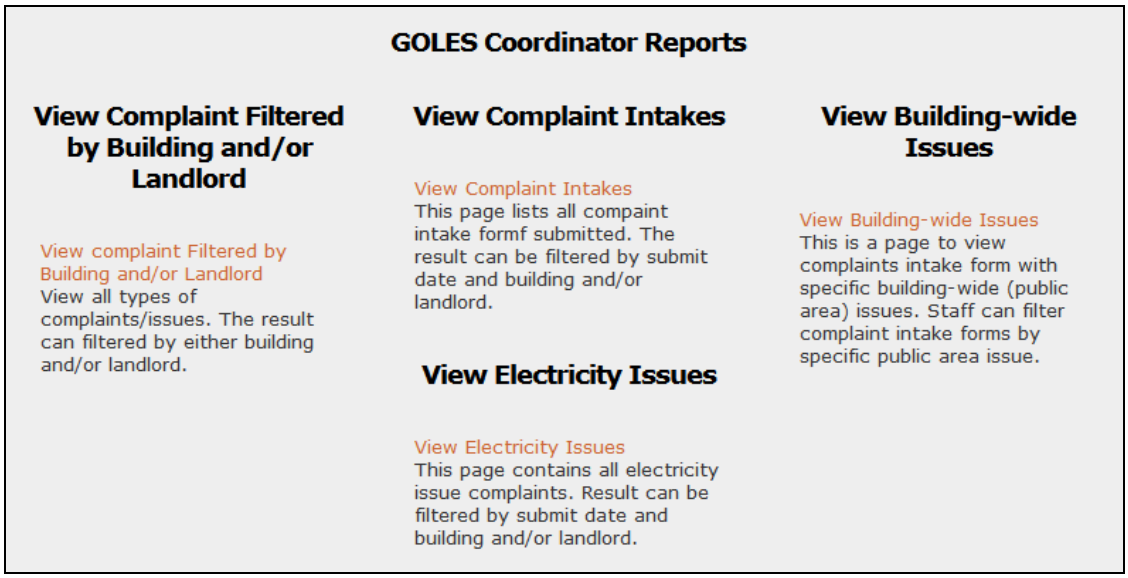
Fused view



Panels

The panels module allows user to create pages that are divided into areas. This module includes several different 2-column and 3-column layouts by default. It creates a dashboard-like page easy for user access

Example Panel Page



Existing Panels

Panel Title	URL
Add New Basic Information	Add_Basic_Info
GOLES Coordinator Reports	GOLES_Reports
Modify Site	coordinator_modify
Submit Complaints/Reports to GOLES	Submit_Complaints

Basic actions in panels settings are:

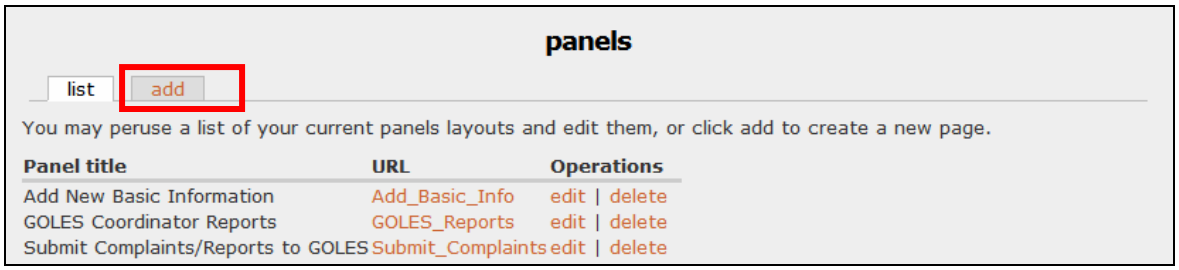
- Creating New Panel Page
- Edit Existing Panel
- Delete Content within Panel

Creating a New Panel

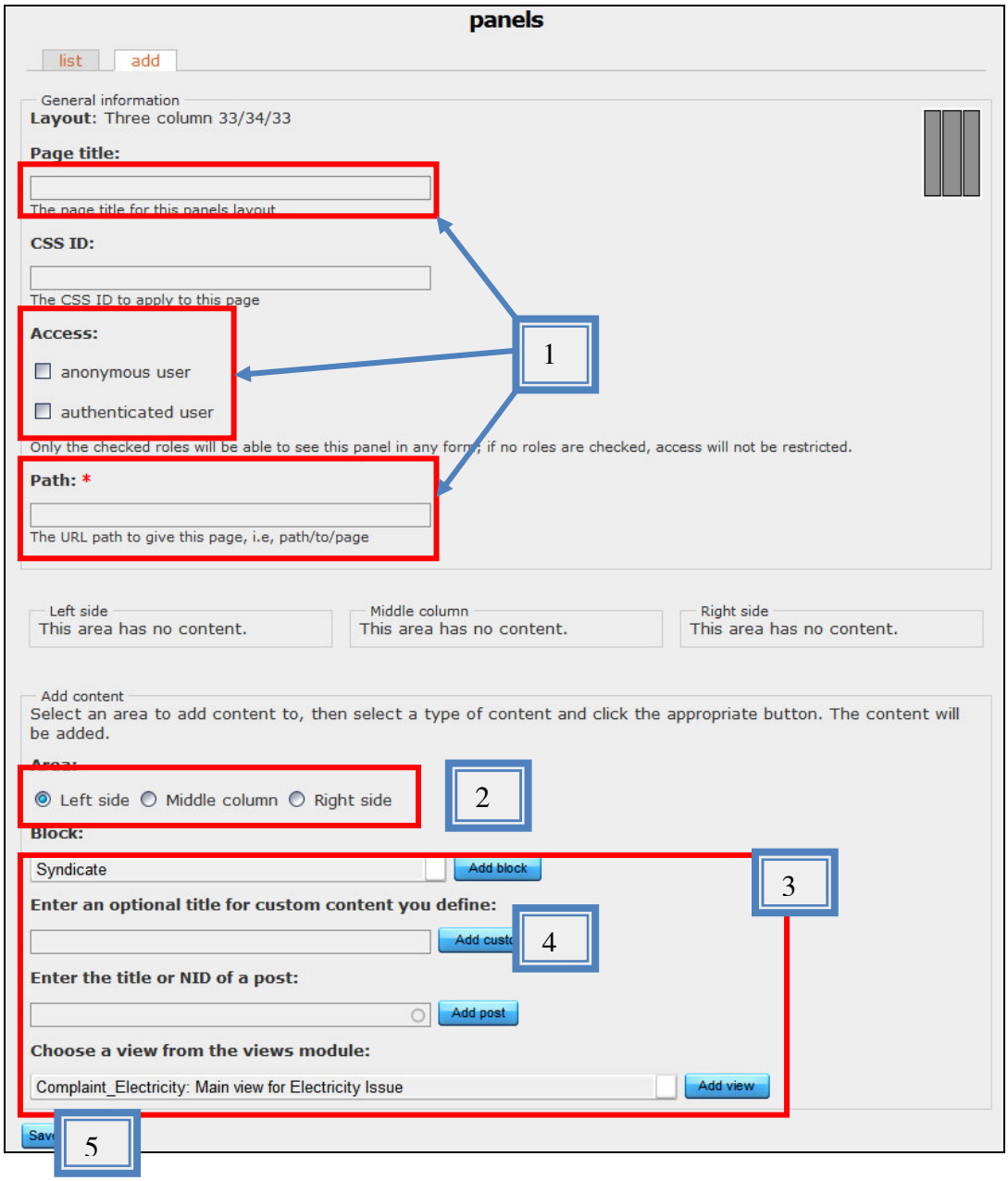
To add a new panel item, site administrator should go to [Administer -> panels]

Step 1: Click on "panels" in the administration menu

Step 2: Click on "add" on the top tap



Step 3: Choose a style for the panel page



Step 4:

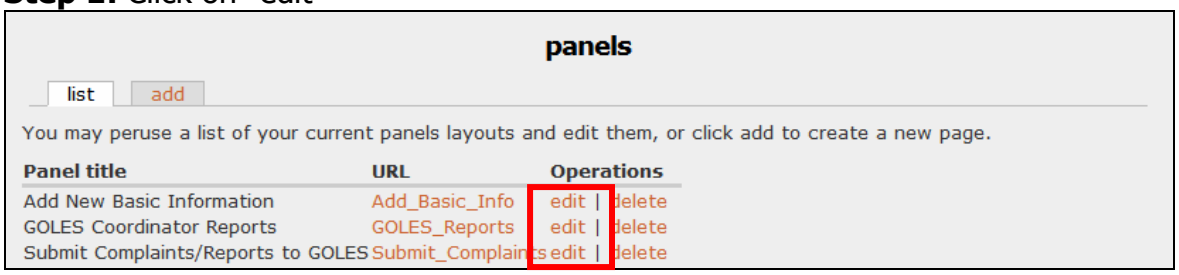
1. Fill in required and/or useful fields including "Page title," "Access," and "Path."
2. Select an area where the content will be displayed (left, middle, or right).
3. Add either a "Block," enter the "title/NID of a post," or choose an existing "View" that you want to add (Note: be sure to click on "Add block," "Add post," or "Add view" after selection).
4. Add optional title for the content (Note: be sure to click on "Add custom" after entering the title).

5. Click on "Save" to save the panel setting.

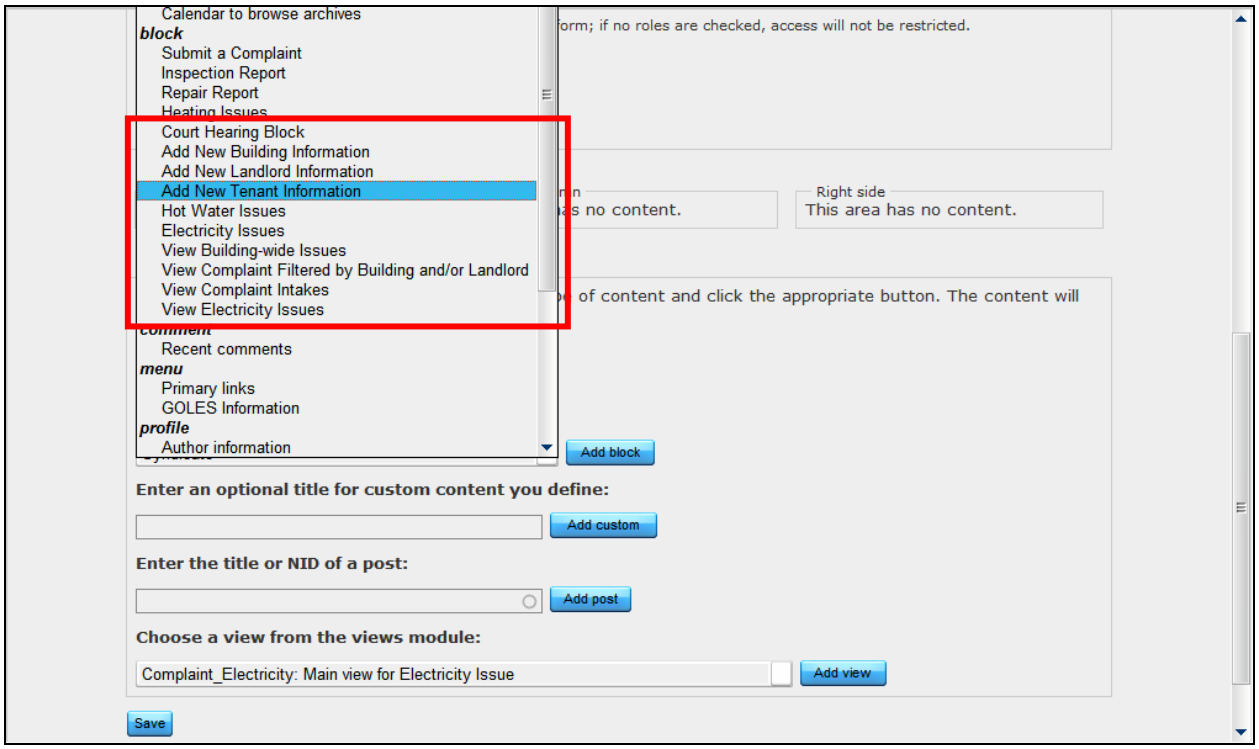
Edit Existing Panel

To edit a existing panel, site administrator should go to [Administer -> panels]

Step 1: Click on "edit"



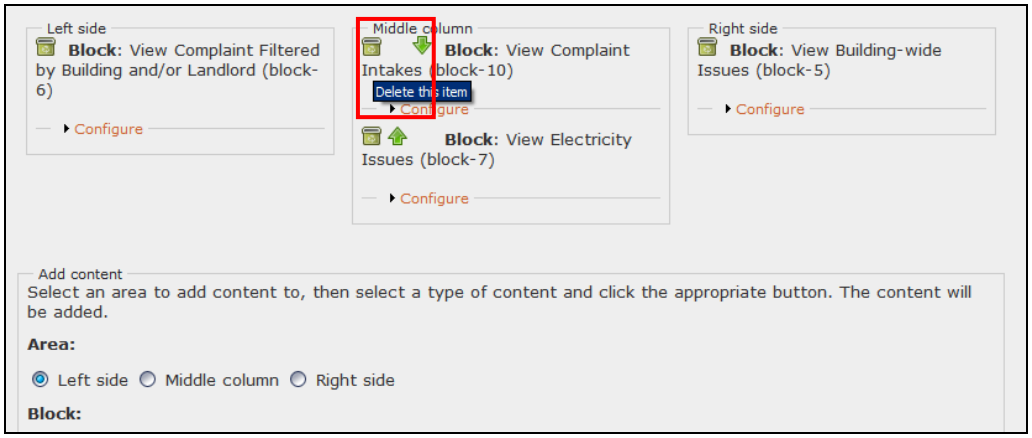
Step 2: Add new content



Delete Content within a Panel

To add a menu item, site administrator should go to [Administer -> panels]

Step 1: Click on "edit" link of the module



Workflow

The workflow module allows user the create and assign arbitrary workflows (and states) to Drupal CCK node types. Workflows are made up of workflow states. For example, a workflow with the states Draft, Review, and Published could be assigned to the Story node type.
Transitions between workflow states can have actions assigned to them. In the example mentioned, one can assign an action so that when the story moves from the Draft states to the Review state, an e-mail is sent out. Another action could be assigned to the transition from Review to Published so that the node's status is set to "Published (and becomes visible on your website).

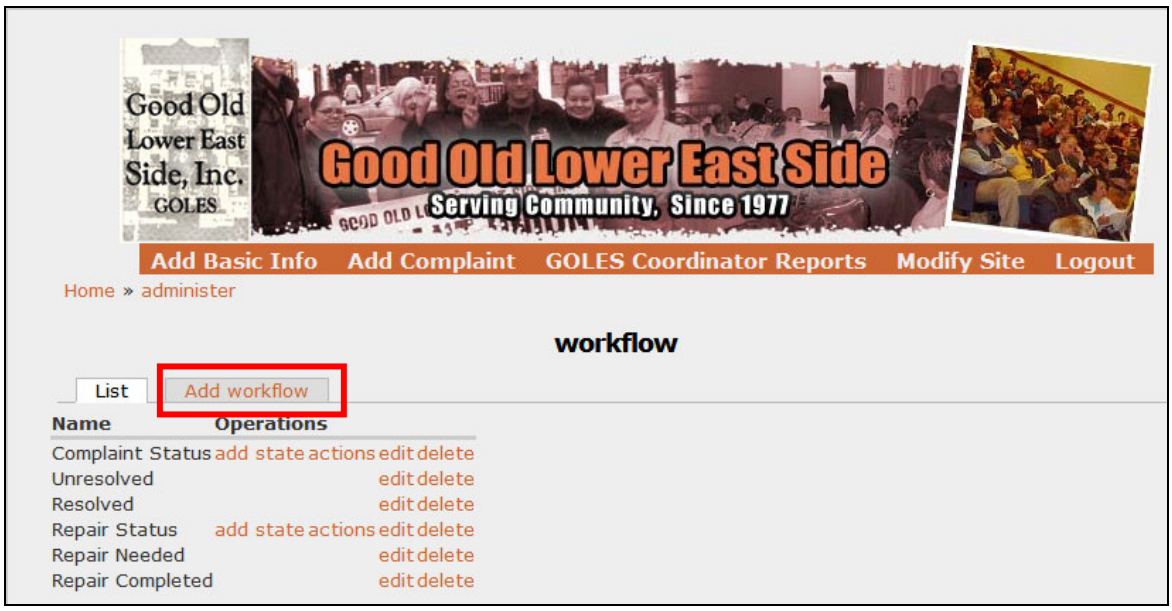
Basic actions in workflow settings are:

- Add State
- Edit workflow/ setup Transition
- Assigning Actions
- Mapping Workflow to Content Types

Add Workflow

To add a workflow, site administrator should go to [Administer -> Workflows]

Step 1: Click "Add workflow"

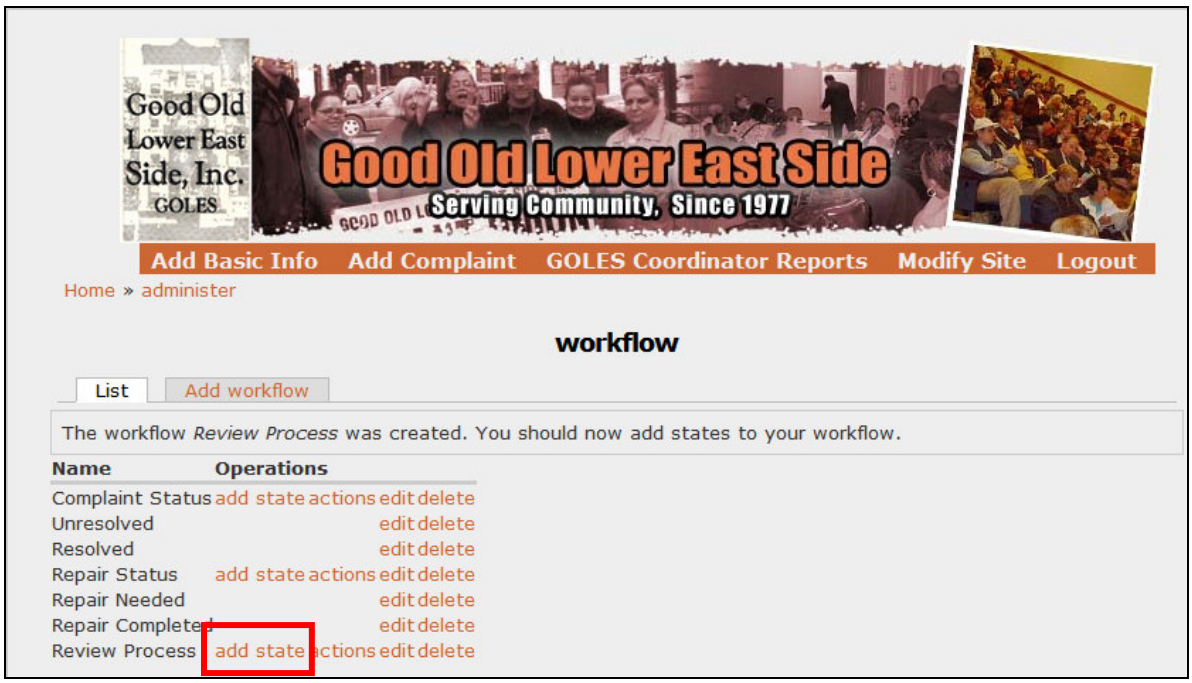


Step 2: Enter "Workflow Name" and click on "Add Workflow"

Add States

To add a state in workflow, site administrator should go to [Administer -> Workflow]

Step 1: Click on "add state"



Step 2: Provide the state with a name and weight, and click "save"

Repeat this step to add more states as needed.

Edit Workflow / Setup Transition

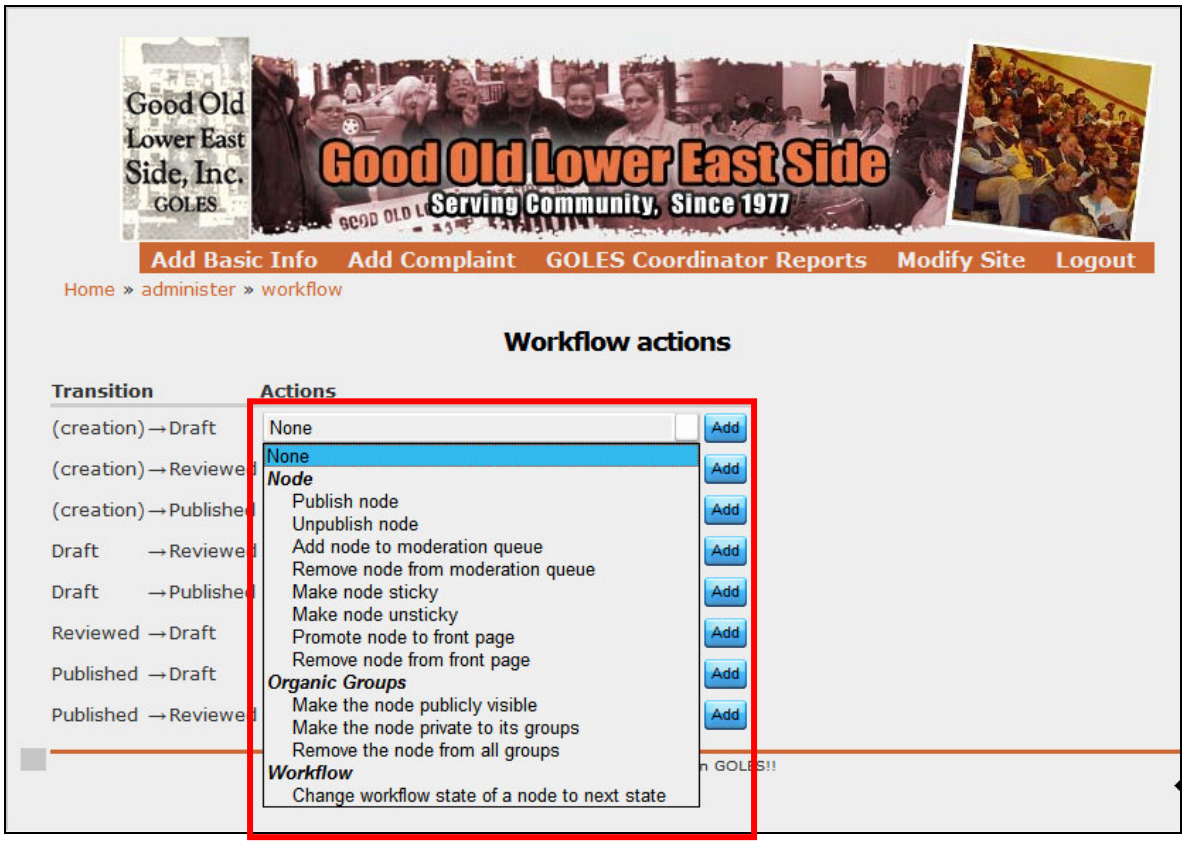
To edit an existing workflow, site administrator should go to [Administer -> Workflow]

Step 1: Check off the permitted transitions between different roles, assign workflow permission, and click on "save"

Assign Actions (Optional)

To edit an existing workflow, site administrator should go to [Administer -> panels]

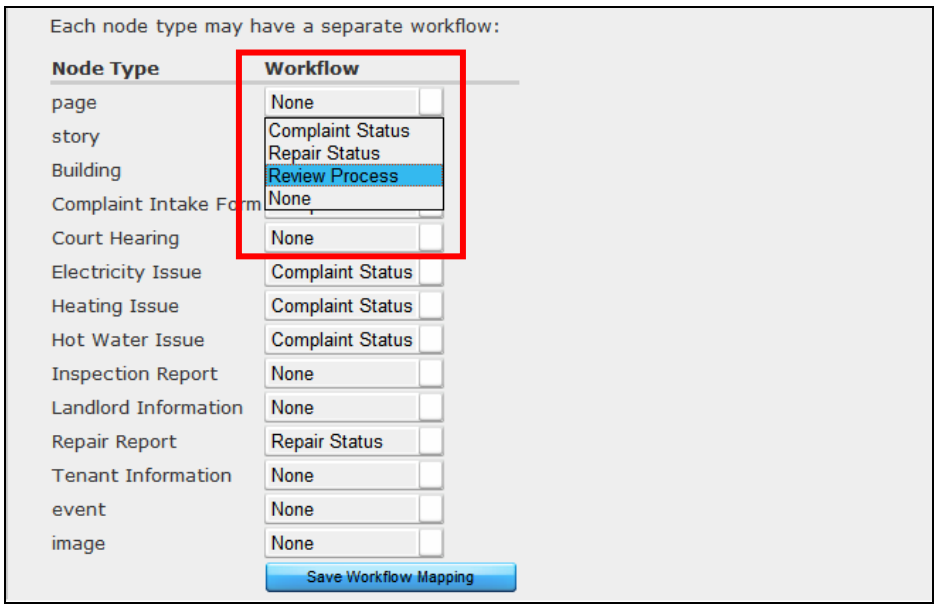
Step 1: Select intended action from dropdown menu and click "add."
Note: To return to workflow main page, click on "workflow" in the breadcrumb



Mapping Workflow to Content Types

After workflows are created, user can map workflow to different content types

Step 1: Select desired workflow for the content type by using dropdown menu, and then click "Save Workflow Mapping"



Complete List of Modules Used in GOLES Complaint System

CCK MODULES

The **Content Construction Kit** allows you create and customize fields using a web browser. The 4.7x version of CCK creates custom content types and allows you to add custom fields to them. In Drupal 5.x custom content types can be created in core, and CCK allows you to add custom fields to content types.

Purpose

CCK provides a way for the site administrator to create different content types for easier organization. By default, Drupal only provides two types of content—page and story—for content creators to use. These two contents, however, are very general and not very useful for the purpose of this system.

Using CCK, administrators can create different content types with the names and fields that are more relevant for a particular content. For example, site administrators can create a content type "Hot Water Report." In this content type, they can require the user to include his/her name, address, apartment number, contact information, problem description, and other information that are helpful for the tenant association or GOLES to understand the whole situation. Content types we created include main complaint intake form, court hearing, heating issue, gas and electricity issue, hot water report, inspection report, repair report, and bed bug report.

The ability to create different content types also makes it easier for administrator to organize, archive, and retrieve different contents. If the coordinator wants to view a particular content, s/he can also do a simple filtering, and the system will retrieve and display only the content that s/he specifies. This is very useful for the coordinator is s/he wants to find out more about a particular issue or complaint.

Computed Field

Allows the user to define computed values in custom content types.

Computed Field is a CCK module which lets you add a computed field to custom content types. You can choose whether to store your computed field in the database. You can also choose whether to display the field, and how to format it. The value of the field is set using php code, so it can draw on anything available to drupal, including other fields, the current user, database tables, etc. The drawback of this is of course that you need to know some php to use it.

Purpose

One of the function that this complaint system will do is to track rent for each apartment over time. The current regulation only allows landlord to increase rents within a certain percentage if the building is under rent control or rent stabilization. Using the computed field, the system can calculate and display the percentage that the rent has increased.

This module is also useful to calculate and display the number of days that have passed after tenants submit a complaint form.

Date

This package contains both the Date module and a Date API module. The Date API is available to be used by other modules and is not dependent on having CCK installed.

The date module is a flexible date/time field type for the cck content module which requires the CCK content.module and the Date API module.

date.module can store dates in two ways, as an iso date (YYYY-MM-DDTHH:MM:SS) or a unix timestamp multiple widgets are available for date input - a drop-down selector, jscalendar pop-up (if jscalendar is installed), and plain text that accepts ISO format or anything strtotime allows optional incusion of the adodb date library extends the valid date range from year 100 to year 3000, without the library it is the usual 1970 to 2038. Create dates with a single input element, or add a second date input element to create 'From' and 'To' dates.

Purpose

Many content types created using CCK module require a “date” field to store dates for many different purposes. These “date fields” include the

date that tenant moved in, the date they first contact their landlord, the date that the paint was last painted, and also court hearing date. This "date" module provides an easy way to integrate date fields into CCK content types.

Phone

Defines a field type for phone numbers. Note: Requires content.module.

Purpose
The content types created using CCK often requires phone fields so that GOLES staff can contact tenant for further question and/or investigation. This module provides a simple check to make sure that the information tenants provide is a legitimate phone number that "phone numbers should only contains numbers and + and - and (and) and spaces."

VIEWS

The views module creates customized views of node lists.

The views module provides a flexible method for Drupal site designers to control how lists of content (nodes) are presented. Traditionally, Drupal has hard-coded most of this, particularly in how taxonomy and tracker lists are formatted.

This tool is essentially a smart query builder that, given enough information, can build the proper query, execute it, and display the results. It has four modes, plus a special mode, and provides an impressive amount of function.

Purpose
With the help of Views module, site administrator can generate customized page views that combine different "nodes" or contents together. With the data gathered from tenants, these customized page views will be used as distinct reports of various purposes.

Reports that the system will display includes "Building-wide issues," "Apartments with violations in rent increasing," "Apartments/Buildings with outstanding issues that remain unresolved," and "Court hearing in the next week." Possibly more customized views will be implemented later as needed.

Calendar module

Adds date calendar themes to views that can display any type of date field, and creates default calendar views.

This module will display any Views date field in calendar formats. Switch between year, month, week, and day views. Back and next navigation is provided for all views.

This module will display any Views date field in calendar formats. Works with CCK date fields, Event module dates, node created and updated dates, and any other Views date field. The module does not create dates, it only displays dates that have already been created elsewhere. Multiple calendars can be created for different purposes, i.e. one that displays node created dates as an archive calendar and another to display CCK dates for a custom content type, just give each a unique url.

Purpose
Many contents in the system are time-sensitive, and that the dates are important. Provide a calendar view, GOLES staff can easily visualize and organize important dates such as "court hearing" and "inspection dates."

Views Date Range Filter

The daterange module provides a programmatic extension for date ranges that can be used by other module developers. It creates new filters for node times, 'Node: Created Time Between' and 'Node: Changed Time Between', as well as new date range filters for CCK date (but not datestamp) fields.

If jscalendar is installed and enabled the date fields are augmented with the jscalendar button for selecting a date.

The supported operators are 'Custom date range', 'Outside date range', 'Before', 'After', 'within the past week', 'within the past month', 'within the past 3 months', 'within the past year'. When the operator doesn't need both input fields, JavaScript attempts to hide the unused fields.

The date fields understand the words 'today' and 'yesterday' and subtraction of days, months, or years.

Purpose
GOLES staff often need to know the timeframe in which the complaints are submitted, or that the status has changed. This module will allow system to output views report that contains complaints filed in the past week, or that the status of the complaints have been changed (from unsolved to solved).

Views_fastsearch

The views_fastsearch module provides an alternative search filter and search sort to the default search methods provided in views_search.inc. This search is considerably faster (than the search in views_search.inc), supports OR terms, exception terms, quoted terms, and sorting by score.

1. It is noticeably faster - 5-20x faster
2. defaults to AND terms, but supports the OR keyword
3. implements exception terms using the – prefix (i.e., "global warming – ocean" searches for nodes that include "global" and "warming" but do not include "ocean")
4. supports quoted phrases
5. implements a sort by the search word score, when there are multiple terms, it sums them up – this presents results where the search words are in the title or header tags higher up in the list.

Purpose
This module enables a more powerful search scheme than the Drupal built-in search. With such as large database of information and reports, GOLES staff need powerful search to facilitate their daily routine work.

Event

This is a simple module to keep track of events and show them to users in various calendar displays. It also provides an event API to allow other modules to store and work with date data.

Purpose
This module enables the system to keep track of different events that happens to the tenants such as court hearing date, date that the complaint was submitted, and also date that the complaint was solved.

Workflow

Enables users to manage content using workflow states. The workflow module allows the creation and assignment of arbitrary workflows to Drupal node types. Workflows are made up of workflow states. For example, a workflow with the states Draft, Review, and Published could be assigned to the Story node type.

Workflow fields

The workflow_fields module extends John VanDyk's workflow module by allowing CCK node fields to be made invisible or read-only depending on the current workflow state. The workflow state form is extended to show all node fields with appropriate controls to hide and/or disable each field for that particular state.

This functionality is useful when a workflow moves among users who have different permissions regarding the document flowing through them. Which is the case in most every workflow we're encountered.

Purpose

Workflow and workflow fields work together to allow CCK content types to have different states in a workflow. The complaints will have two states: unsolved and unsolved. As the complaints are submitted, the status of the node is considered "unsolved." After GOLES staff work with tenants and resolve the issue, GOLES staff can change the status of the node to "solved."

The workflow feature can also work hand-in-hand with the Action module to provide more robust function.

Action

Scriptable actions configurable through the web.

The actions module allows the configuration of Drupal actions. A Drupal action is a specially written PHP function whose parameters are configured through the web. For example, the Send Email action has parameters Recipient, Subject, and Message. You could fill in MrFoo@example.com for the recipient, Hi for the subject, and Hello, Mr. Foo for the message to create an instance of the Send Email action. This action instance could then be fired by a module at appropriate times when you want Mr. Foo to get an email.

The workflow module is an example of a module that uses Drupal actions.

Purpose

Working in conjunction with workflow, Action module provide features that GOLES staff can set-up according to different transitions and state in the workflow. When a complaint of any kind is created (submitted by tenant), they system will notify GOLES staff via e-mail.

TinyMCE Module

This module integrates the TinyMCE WYSIWYG editor into a Drupal site for editing advance site content.

TinyMCE is a platform independent web based Javascript HTML WYSIWYG editor control. It has the ability to convert HTML TEXTAREA fields or other HTML elements to editor instances.

Purpose

The WYSIWYG editor allows user to do advanced formatting when creating and editing content without know technical details about HTML. This module allows site administrators and other content creators to generate posts with pretty formats, colors, and styles without knowing anything about HTML.

Panels

This module allows you to create pages that are divided into areas of the page. Where the dashboard module only gave four areas--top, bottom, left and right--this one is a completely flexible system that includes a couple of 2 column and 3 column layouts by default, but is also highly extensible and other layouts can be plugged in with a little HTML and CSS knowledge, with just enough PHP knowledge to be able to edit an include file without breaking it.

Purpose

This module helps the system to present links in dashboard manner which are easy to modify and manipulate. Dashboard interfaces allow users to access different pages without click through a series of click streams. In addition, it also allow explanation and information about the links.

Views Fusions

Views Fusion allows one to fuse multiple views into one. One can build fused views displaying information that is stored in multiple nodes. This is particular useful for multiple tabular views. It uses node relations and/or CCK node reference fields to join the appropriate nodes together. Views Fusion can also fuse views that are already fused, and it also works well for external (exposed) filters.

Purpose

The purpose of this module is to combine multiple views into one view. As a native system constraint of Drupal, CCK, and node reference, it is not possible to use regular view (single view) to show node reference

information. With this module, it is possible to fuse multiple views that are related by "node reference." This way, it is possible to show all information related to one node in a single tabular view.