





## Matrix List (ML-1)

 **Matrices** 

[Add](#) | [Import](#) | [Manage Site Associations](#) | [Permissions](#)

**Manage Matrices** viewing 1-2 of 2 items

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Name	Owner	Status
 <a href="#">History Department Goals</a> <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Export</a>   <a href="#">Permissions</a> This is the description for this matrix.	Bob Coordinator	Published
 <a href="#">History Fun</a> <a href="#">Publish</a>   <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Export</a>   <a href="#">Permissions</a>	Bob Coordinator	Unpublished

### Notes

- Upon clicking 'Permissions' in the tool navigation bar, the system displays the Matrices Tool Permissions screen (MTP-1).
- Upon clicking 'Permissions' next to a matrix, the system displays the Matrix Permissions screen (MP-1).
- Only users in roles with the site.upd permission will see the 'Manage Site Associations' link.
- Only users in roles with the site.upd permission will see the 'Permissions' link in the tool navigation bar.
- Only users in roles with the 'Revise.any' or 'Revise.own' link will see the Permissions link next to a matrix. If a user's role has only the 'Revise.any' permission OR the 'Revise.any' permission and the 'Revise.own' permission, then the user will see the 'Permissions' link next to all matrices in the site. If a user's role has only the 'Revise.own' permission then the user will only see the 'Permissions' link next to matrices that he or she owns.

# Matrices Tool Permissions (MTP-1)

## Matrices



### Permissions

Set permissions for Matrices in worksite 'Portfolio Test'

Role	Use	Create	Revise.any	Revise.own	Delete.any	Delete.own	Publish.any	Publish.own	Export.any	Export.own
Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assistant	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Evaluator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Cancel

### Notes

#### Permissions

- Selecting 'Use' grants users in that role permission to attach evidence, fill out forms, and submit a cell for review or evaluation.
- Selecting 'Create' grants users in that role permission to create a new matrix. If a user's role does not have the 'Create' permission, then the user will not see the 'Add' link.
- Selecting 'Revise.any' grants users in that role permission to edit the structure, guidance, and forms of an existing matrix that may or may not have been created by the user. If a user's role does not have the 'Revise.any' permission, then the user will not see the 'Edit' link for matrices that the user does not own.

## Notes for Matrix Permissions (MPN-1)

### Notes

#### Permissions (cont.)

- Selecting 'Revise.own' grants users in that role permission to edit the structure, guidance, and forms of an existing matrix that is owned by the user. If a user's role does not have the 'Revise.own' permission, then the user will not see the 'Edit' link for matrices that the user owns.
- Selecting 'Delete.any' grants users in that role permission to permanently remove an existing published or unpublished matrix that may or may not have been created by the user. If a user's role does not have the 'Delete.any' permission, then the user will not see the 'Delete' link for matrices that the user does not own.
- Selecting 'Delete.own' grants users in that role permission to permanently remove an existing published or unpublished matrix that is owned by the user. If a user's role does not have the 'Delete.own' permission, then the user will not see the 'Delete' link for matrices that the user owns.
- Selecting 'Publish.any' grants users in that role permission to make a new or imported matrix, that may or may not have been created by the user, available for use by participants, evaluators, and reviewers. If a user's role does not have the 'Publish.any' permission, then the user will not see the 'Publish' link for matrices that the user does not own.
- Selecting 'Publish.own' grants users in that role permission to make a new or imported matrix, that is owned by the user, available for use by participants, evaluators, and reviewers. If a user's role does not have the 'Publish.own' permission, then the user will not see the 'Publish' link for matrices that the user owns.
- Selecting 'Export.any' grants users in that role permission to export a matrix, that may or may not have been created by the user, including the structure, guidance and forms included with the matrix. If a user's role does not have the 'Export.any' permission, then the user will not see the 'Export' link for matrices that the user does not own.
- Selecting 'Export.own' grants users in that role permission to export a matrix, that is owned by the user, including the structure, guidance and forms included with the matrix. If a user's role does not have the 'Export.own' permission, then the user will not see the 'Export' link for matrices that the user owns.

#### Save

- Upon clicking 'Save', the system applies any changes to permissions and then displays the following confirmation message on the Matrix List screen (ML-1) to the user:

Your changes have been saved successfully.

#### Cancel

- Upon clicking 'Cancel', the system clears any changes to permissions made during this session and then displays the Matrix List screen (ML-1) to the user.

## Matrix Permissions (MP-1)

### Matrices

History Department Goals ▶ Permissions

Roles:	Coordinator	Assistant	Evaluator	Reviewer	Participant	Observer
<b>General</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view / access all matrix cells	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view evaluations created by another user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view feedback created by another user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can manage matrix cell status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view / access user list and cell owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can view all groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Cancel

### Notes

#### Permissions

- Selecting the top-level checkbox beneath each role will first select all permissions for that role. Once all permissions are selected, selecting the top-level checkbox will deselect all permissions for that role.
- Selecting 'Can view / access all matrix cells' grants users in that role permission to view all participant content, not evaluations and feedback, in all cells in the associated matrix. Without this permission, users in that role will not have permission to access matrix content unless the coordinator has granted the user permission by adding the user as an evaluator or reviewer or by granting the user the Use permission at the tool level.

## Notes for Matrix Permissions (MPN-1)

### Notes

#### Permissions (cont.)

- Selecting 'Can view evaluations created by another user' grants users in that role permission to view evaluations created by any user. Without this permission, users can only access evaluations that he/she owns, but users will see that an evaluation has been created.
- Selecting 'Can view feedback created by another user' grants users in that role permission to view feedback created by any user. Without this permission, users can view feedback that he/she owns.
- Selecting 'Can manage matrix cell status' grants users in that role permission to manage the status of all cells in the associated matrix. Without this permission, users in that role will not have the ability to manage cell status.
- Selecting 'Can view / access user list and cell owner' grants users in that role permission to view the owner of the submitted collection. Without this permission, users in that role will not have the ability to view the owner of the submitted collection and they will not see the user list drop-down. (Remove owner's name from 'Owner' column on Manage Evaluations screen and 'Created by' column under Evidence on Evaluation screen. Also, the form title appears to be automatically generating the name of the form using the user's username. This behavior will need to be changed to support blind evaluations.)
- Selecting 'Can view all groups' grants users in that role permission to view all participants' submissions, regardless of the user's group membership. Users assigned a role without this permission may only view submissions from participants in groups in which the user is a member.

#### Save

- Upon clicking 'Save', the system applies any changes to permissions and then displays the following confirmation message on the Matrix List screen (ML-1) to the user:

Your changes have been saved successfully.

#### Cancel

- Upon clicking 'Cancel', the system clears any changes to permissions made during this session and then displays the Matrix List screen (ML-1) to the user.

## Create/Edit Matrix: Evaluation (CEM-1)

**Evaluation**

The following will be the defaults for all cells. Defaults can be overridden on a per cell basis.

**Evaluation**

Select a form for the evaluator to complete when evaluating the participant's submitted work.

Evaluation  ▼

Allow evaluators to return evaluations to participants

**Evaluators** [Add Evaluators](#)

No evaluators have been added.

### Notes

- By default, the 'Allow evaluators to return evaluations to participants' checkbox is checked.
- If a user deselects the 'Allow evaluators to return evaluations to participants' checkbox, then any user, regardless of role, will no longer have the ability to return participant evaluations and hence participants will not see their evaluations.

**Note:** The workflow in the evaluations tool will need to change to support this. If this setting is not selected, then any evaluations completed by an evaluator will not be returned to the participant.

## Edit Cell: Evaluation (EC-1)

**Evaluation**

**Evaluation Form**

Use defaults from matrix properties

Evaluation (History Department)

Allow evaluators to return evaluations to participants

**Evaluators**

Use default evaluators selected in matrix properties

1. Joe Evaluator (evaluator)

**This Cell is Linked to:**

There are no links to display

### Notes

- Default setting for 'Allow evaluators to return evaluations to participants' is applied at the cell level unless the user deselects the checkbox next to 'Use defaults from matrix properties'. If the user deselects the checkbox next to 'Use defaults from matrix properties', then the user has the option of deviating from the default matrix settings.

# View Matrix (VM-1)










## Matrices

[Edit Properties](#) | [Permissions](#) | [Return to List](#)


### View "History Department Goals" : Joe Evaluator

Select group  Select user

Click on a cell to view/edit

History Department Goals	Beginner	Intermediate	Advanced
PUL 1			
PUL 2			
PUL 3			

#### Legend

-  Ready
-  Completed
-  Pending
-  Locked
-  Returned

#### Notes

- If the user clicks the 'Permissions' link, the system will display the Matrix Permissions screen (MP-1).



# Evaluations (E-1)

## Evaluations



[Manage Status](#)

**Site:** History Department

**Matrix Name:** History Department Goals

**Title:** Goal: PUL 1; Level: Beginner

Status is PENDING and cannot be altered

### Items

Created By

Last Modified

Other Evidence

[HistoryDeptGoals.rtf](#)

[Add Feedback](#)

Liz Participant

06-19-2008

### Reflection

Created By

Last Modified

[History Department-Goals: PUL 1;Levels: Beginner-Reflection](#)

Liz Participant

06-19-2008

### Feedback

[Add Feedback](#)

Created By

Creation Date

No feedback created

### Evaluations [Add Evaluation](#)

Created By

Last Modified

History Department-Goals: PUL 1;Levels: Beginner-Evaluation-1764390979

Wendy Evaluator

06-19-2008

### Matrix Provider Tags

There are no tags to display.

[Back to Evaluations](#)

## Notes for Evaluations (EN-1)

### Notes

- A user without the 'Can view evaluations created by another user' permission may still see that an evaluation has been created by another user, but may not click on the link to read the evaluation.

**Question for Lynn:** Do we need to add this same functionality for Feedback? **Yes, thanks!**

- When coordinator has deselected the option 'Allow evaluators to return evaluations to participants', upon creation of the matrix, then participants will not see evaluations created by evaluators.


# Feedback


## Matrices

[Manage Status](#)

**Site:** History Department  
**Matrix Name:** History Department Goals  
**Title:** Goal: PUL 1; Level: Beginner

 Status is PENDING and cannot be altered

Items	Created By	Last Modified
Other Evidence		
 <a href="#">HistoryDeptGoals.rtf</a> <a href="#">Add Feedback</a>	Liz Participant	06-19-2008

Reflection	Created By	Last Modified
 <a href="#">History Department-Goals: PUL 1;Levels: Beginner-Reflection</a>	Liz Participant	06-19-2008

Feedback <a href="#">Add Feedback</a>	Created By	Creation Date
 History Department-Goals: PUL 1;Levels: Beginner-Feedback-1764390980	Bob Reviewer	06-19-2008

### Matrix Provider Tags

 There are no tags to display.

[Return to Matrix](#)

## Notes for Feedback (FN-1)

### Notes

- A user without the 'Can view feedback created by another user' permission may still see that feedback has been created by another user, but may not click on the link to read the feedback.