

Totara Social: Product design brief

Document control

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| Abstract: | Presents Totara Social's design goals to ensure subsequent design and development meets the needs of end-users. | | |
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1. Purpose of document

This document is intended to:

1. Provide a high-level conceptual overview of a competitive enterprise social platform and its primary components based on research into enterprise social software, in both the marketplace and best practice
2. Propose a design approach leveraging Mahara as the base platform for Totara Social, and offering three general configuration capabilities, allowing Totara Social to serve the enterprise market as:
 - a. A fully standalone enterprise social platform
 - b. An enterprise “social learning” platform integrated with Totara LMS
 - c. An integrated enterprise social platform, able to receive and display activity stream data from other enterprise applications via a widely-accepted Activity Stream specification
3. Present draft wireframes of key pages of the platform
4. Explain plans to leverage existing open source technologies to realize proposed functionality which is technically challenging (specifically: Chat, Recommendation engine, Screenshare)
5. Suggest a roadmap for future enhancements to the platform (including gadgets for wider enterprise application interaction), and reasons for their consideration
6. Gather feedback, further requirements and insight from the Totara Partners to help validate the thinking, concepts, design approach, and requirements

2. Conceptual overview

In this section, we provide a high-level conceptual overview of a competitive enterprise social platform and its primary components based on research into enterprise social software, in both the marketplace and best practice.

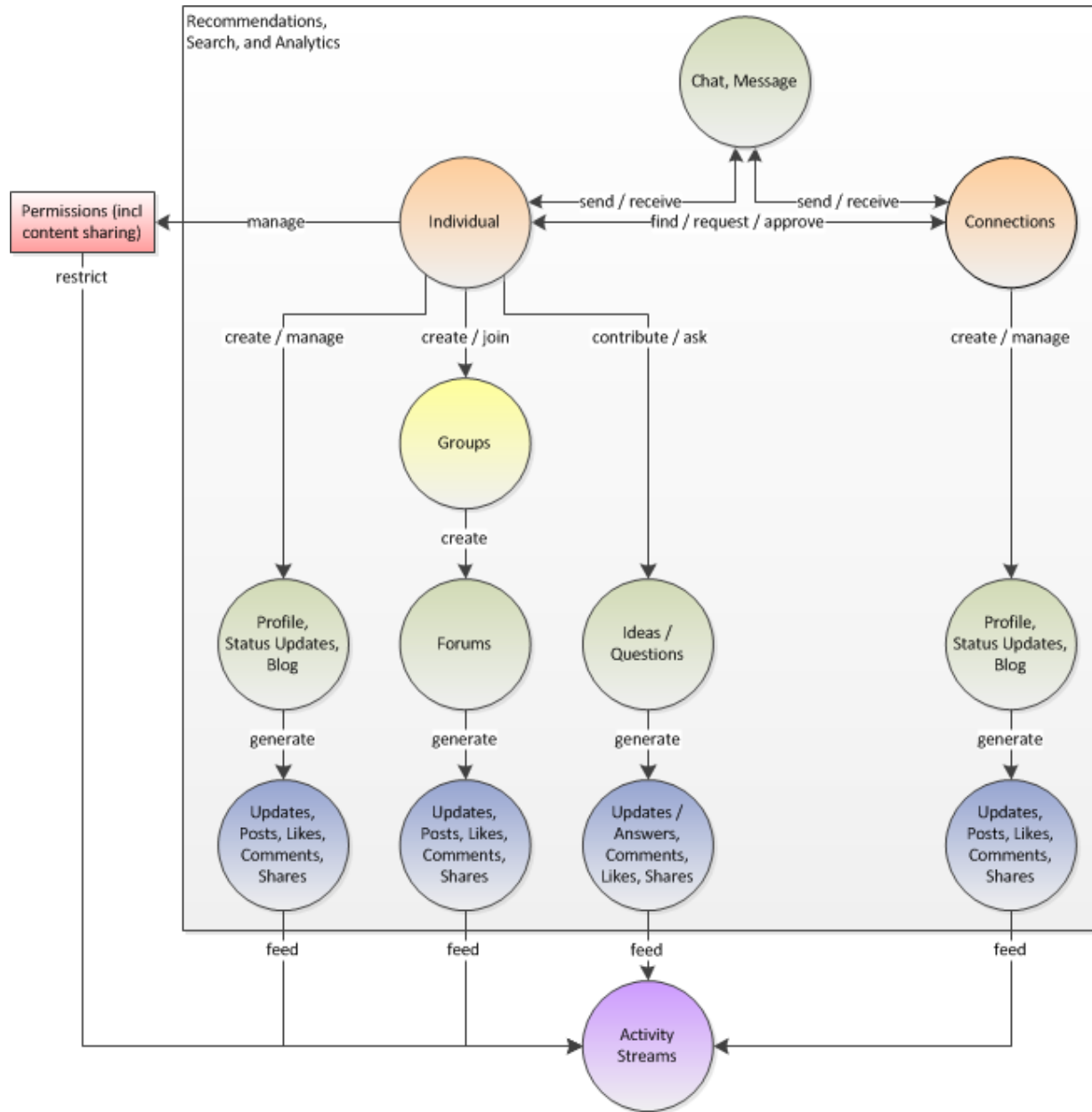
2.1 High-level definition

A competitive enterprise social platform is as software system designed to transform the information workplace with:

1. Social capabilities including profiles, activity streams, status updates (i.e., micro-blogging), groups (i.e., communities), blogs, wikis, RSS feeds, discussion forums, chat, and messaging
2. Functionality facilitating the social contribution, distribution, consumption, and validation of knowledge and ideas (i.e., knowledge, idea, and insight sourcing)
3. Search and recommendation technology to connect individuals to the content most relevant (and most important) to getting their job done, and to the individuals that most important
4. Integration with enterprise applications via a single activity stream including activities spanning all enterprise applications, allowing individuals to comment and interact with those activities
5. Mobile access to allow key interactions with the platform at anytime, from anywhere

2.2 Conceptual diagram

The diagram below shows the principle concepts and relationships in a typical enterprise social platform.



2.3 Principle concepts

The table below presents the principle concepts of a typical standalone enterprise social platform, as well as a typical integrated social enterprise platform (implemented via the Activity Stream specification only – integration with other enterprise applications via other methods are not included).

| ID | Concept | Comments |
|------|----------|--|
| C-01 | Activity | <p>An activity is the core information component of an activity stream. It tells the story of a person or a system (i.e., the actor) performing an action on or with something. The general structure of an activity consists of an actor, a verb, an object, and a target, though the target is often optional.</p> <p>Example activities in a standalone enterprise social platform include: "Geraldine posted a photo," "John shared Mary's video," "Amy updated her bio," "Sue contributed an idea," "Bill asked a question," "Edward answered a question" "David posted a blog entry" etc.</p> <p>Example activities in an integrated enterprise social platform include: "Geraldine updated an opportunity in the CRM," "John opened a ticket assigned to you in the Support Portal," "Amy completed a program in the Learning Platform," "Bill earned a new badge in the Learning Platform," "Edward created a new course in the Learning Platform," "David uploaded a file to the File Repository" etc.</p> <p>Activities appear in an activity stream, where individuals can interact with the activities by "liking", sharing, and replying to (i.e., commenting on) the activity or to other replies to the activity. These interactions appear visually connected to the original activity in the activity stream, and generate new activities in the activity streams of users who are outside of the original first degree network. Examples include: "John liked Geraldine's photo" "Amy shared Geraldine's photo", "Sue replied to Geraldine's photo," "Geraldine replied to John's post," "David replied to Amy's program completion," etc.</p> <p>An activity has many properties including icon (from a media source), title, content (including HTML), url, generator, provider, published date/time, updated date/time and attachments (each attachment with properties including author, published date/time, etc). These properties follow the definition of an activity object in the JSON Activity Stream 1.0 Specification, an open standard for activity streams which has been widely adopted in the enterprise social market.</p> |

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| C-02 | Activity stream | <p>An activity stream is a reverse-chronological feed of activities allowing users to keep up-to-date with new information provided by people and systems, and to engage with other users about the information.</p> <p>In an enterprise social platform, there are usually four types of activity streams. These are listed below, along with a description of what they contain and examples:</p> <ol style="list-style-type: none"> 1. Individual Stream: Activities an individual has generated or participated in Examples: individual's status updates, ideas contributed, questions asked, questions answered, comments, "likes", new connections made, profile changes made, and forum posts. 2. Home Stream: Activities generated or participated-in by an individual's connections/colleagues Examples are conceptually the same as the individual's activity stream except they are centralized on activities generated by an individual's first degree network 3. Group Stream: Activities generated by group administrators and group members within a group's forums or pages Examples: New forums added, new forum discussions created, replies to forum discussions, pages added, content added to pages, comments added to page content 4. Company Stream: Activities accessible by all logged in users and published by only by administrators. A company is a group which all users are automatically added to Examples: Status updates, new pages added, <p>The activity stream shown an individual's homepage centralizes activities based on the individual's connections and all the groups of which the individual is a member.</p> |
| C-03 | Analytics | <p>Analytics visually communicate trends including the number of users, connections, updates, questions, answers, ideas, contributors, views, replies, raters, ratings, groups, forum discussions (posts and replies), blog posts (and replies), topics, searches, search responses, and recommendation responses.</p> |
| C-04 | Answer | <p>An answer is a response to a question in the form of free-text, uploaded media (image, audio, or video), external url, or screenshare recording.</p> <p>Answers, and their corresponding questions, are an essential</p> |

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| | | <p>way for knowledge to be informally shared within an enterprise social platform and are not confined to groups (i.e., are designed to be site-wide). Answers can be tagged with topics, as well as delivered in activity streams, search results, and recommendations.</p> <p>Individuals can find questions to answer in their homepage activity stream, the activity streams of other users, the Questions are (including the “Unanswered questions” listing), and the Question recommendation block. Questions can also be shared with other users within the activity stream, or via direct link. An individual can provide an answer to a questions in any of these areas.</p> <p>In their profile, individuals can see the number of answers they have provided, and link to a list of those answers (and their corresponding questions).</p> |
| C-05 | Blog | <p>A blog (or journal) contains long-form series entries of useful commentary, event descriptions, or other types of information. Blog entries may content multimedia including embedded images, audio, and video, as well as links to external references. Entries are commonly displayed in reverse-chronological order, and can be tagged with topics (i.e. tags). Blog entries can be navigated via topic clouds (i.e., tag clouds).</p> <p>Depending on permissions set by the individual who maintains the blog, blogs can allow other users to view the blog entries and leave comments. Other options for users include giving ratings. Blog entries can also be included in search results, and added to “lists” maintained by users.</p> |
| C-06 | Chat | <p>Chat (i.e., instant messaging) is a form of synchronous communication between two users logged into the enterprise social platform.</p> <p>Individuals can chat with their connections via chat block, which is available on every page. The block displays a searchable list of the individual’s connections, and indicates which connections are online. A chat dialog takes place in a hovering chat window. An individual can have more than one chat at a time.</p> <p>Chat content is private (i.e., chat dialogs are not published), however chat content can be used by the recommendation engine for suggesting relevant content (questions, answers, ideas) or connections.</p> |
| C-07 | Company | <p>A company is a group which all users in the platform are</p> |

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| | | <p>automatically added to. Administrators can manage pages in the company group and manage forums—updates from which appear in the company activity stream.</p> |
| C-08 | Connection | <p>A connection (i.e., contact, colleague, or friend) is a person who is willing to share profile access, activity updates, and online status for engaging in chat sessions. Connections are made by a connection request, which can either be accepted or rejected. Once a connection accepts a request from an individual, information can be shared (e.g., access to the contact’s own activity stream) based on permissions.</p> |
| C-09 | Forum | <p>A forum (i.e., discussion board or message board) allows individuals to engage in conversations in the form of discussions (i.e., forums) containing posted messages and replies, which are typically displayed as message threads. When authoring a forum post, individuals can usually upload images, audio, video, and documents, and include external urls for others to learn from. Forums are usually organized within groups. Therefore, access to forums will depend on group membership.</p> |
| C-10 | Idea | <p>An idea is an insight piece of information worth sharing with the enterprise. Types of ideas include quick tips, best practice examples, and innovation suggestions (e.g., new product features, process/service improvements etc).</p> <p>Ideas are presented in the form of a thumbnail image, title, description, the name of the contributor (hyperlinked to the contributor’s profile). Ideas can also include a variety of media including external links, uploaded files (documents, images, audio, video) or screenshare recordings.</p> <p>When contributing an idea, individuals can choose the audience that will receive an update in its activity stream (e.g., all or selected contacts; all or selected groups, all or selected communities; or all users across the organization).</p> <p>Before contributing an idea, the contributor can decide which keywords, tags, and categories should be assigned to the idea. After the idea is posted, any individual can update the keywords, tags, and categories. Contributors receive message when keywords, tags, and/or categories have been updated on any idea they have contributed.</p> <p>When other users see an idea in their activity stream, or in search results, they can comment on it or rate it.</p> |
| C-11 | Inbox | <p>An inbox is a collection of messages received by an individual</p> |

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| | | from users in the system or the system itself. An individual can see which messages have been read or which are unread. An individual can reply to messages and delete them. |
| C-12 | Individual | The individual is essentially the logged in user, and can be any person who has been given a user account. |
| C-13 | Like | The “Like” link allows individuals to signal agreement with content to their social network. It a quantifiable alternative to expressing reaction to content like replies, and is more simplified than content voting systems (e.g., five-star rating). The popularity of an item of content can be attributed to the number of “Likes” it has received. Recommendation engines can also utilize an individual’s “Like” history to make recommendations (e.g., recommended activities with content or reply threads containing similar terms or phrases to content previously “liked”, or recommended connections with similar “like” histories). |
| C-14 | Messages | Messages allow users to asynchronously communicate with each other by composing messages and replying to previous messages. Similar to email, a message contains a subject and message. The message body may contain HTML and hyperlinks. Individuals can begin the messaging process from the profile pages of other users, from their connections page, or from their inbox. Messages can be sent from users or from the system. |
| C-15 | Permissions | Permissions allow individuals to specify how their profile and generated content is shared with other users in the platform. |
| C-16 | Profile | <p>The profile presents an individual’s workplace identity, social contribution history, and level of social influence. It allows individuals to manage their own workplace identity, to see a record of their own contributions, and to.</p> <p>Elements of an individual’s workplace identity shown in the profile include photo, name, title, manager, organization, location, hire date, brief bio, list of interests, and resume. Individuals can manage many elements of their workplace identity. Note: if an enterprise social platform is integrated with an organization’s HR system, then elements such as title, manager, organization, hire date, and position history can be feed from the HR system to individual’s profiles.</p> <p>Individuals can also share further information about themselves by way of a resume, blog, uploaded media (e.g., HTML, images, audio, video), links external references (other websites, or social networking accounts like LinkedIn or Twitter), or feeds (RSS or Atom from external blogs).</p> |

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| | | <p>The individual's social contribution history takes the form of an activity stream, essentially a chronological series of all the contributions that the individual has made (e.g., status updates, ideas, questions, answers, comments, contacts made, forum discussion posts).</p> <p>The individual's level of social influence takes the form of social metrics and a social influence map. Some common social metrics include number of status updates, ideas, questions, answers, comments, contacts / followers. The metrics can be aggregated into a summary score (e.g., 'contributor score' similar to a Klout score) or level (e.g., 'contributor level', or 'level of awesomeness'). A social influence map depicts a graph of all the connections that a user has.</p> |
| C-17 | Questions | <p>Questions are a key way for individuals to request expertise, as well as to learn from previous questions asked and answers to previous questions (and any comments added to both questions and answers). When posting questions, individuals can choose the audience that will receive an update in its activity stream (e.g., all or selected contacts; all or selected groups, all or selected communities; or all users across the organization). Before and after posting a question, individuals can decide which keywords, tags, and categories should be assigned to the question.</p> |
| C-18 | Recommendations | <p>Recommendations suggest potentially useful information (e.g., ideas, questions, answers, forum posts, wiki's bogs) to an individual based on data collected about the individual (profile data, past searches, past filter selections, content of pages viewed, content of knowledge lists, contacts).</p> <p>Recommendations are typically ranked by relevance, ratings and usage metrics.</p> <p>Recommendations can also suggest contacts (e.g., "People you should be in contact with") ranked based on valuable match criteria (similar searches, find and connect with other users with similar interests (to learn about their professional backgrounds and interests, as well as to learn from the knowledge they have shared)</p> |
| C-19 | Reply | <p>A reply is a written, freeform, feed response to an idea, question, answer, or status update. Each comment displays the response text, the date and time of the response, and a hyperlinked name of the commenter. The hyperlink on the commenter's name links to the commenter's profile (thus providing an opportunity for other users to make a contact request (and or 'follow' the commenter), thereby extending</p> |

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| | | their social network. |
| C-20 | RSS Feed | A feed which allows a user to pull data from an external source (which frequently updates content) using the RSS format. RSS feeds are useful for individuals who maintain an external blog and would like to allow for the blog entries to automatically appear in the user's profile. |
| C-21 | Search | Search allows individuals to easily find information across their network and data, to discover ideas, expertise, and knowledge, by entering keywords and using facets (e.g., 'category' and 'media type') to filter search results. |
| C-22 | Search results | Search results are a listing of information items returned by a search engine and are typically ordered by a ranking algorithm. Each result includes a thumbnail image (e.g., screenshot, media type icon, etc), title, description, name of the creator (hyperlinked to the creator's profile), and the date and time it was added. Search results can be sorted (e.g., by 'relevance', 'newest', or 'oldest'), and filtered by facets (e.g., 'categories', 'tags', or 'media types'). |
| C-23 | Share | The share function allows individuals to distribute activities found in their activity stream to all the users who they are connected with, as well as the groups they are members of. |
| C-24 | Status updates | Status updates are a form of micro-blogging allowing individuals and group leaders to inform their network about important things such as what they are working on, as well as events and information worth sharing. |
| C-25 | Topic | A topic (i.e., 'tag') is a non-hierarchical keyword or term assigned to a piece of information (idea, question, answer, status update, forum post) which helps describe the item and allows it to be found again by browsing or searching. Topics are generally chosen informally and personally by the item's creator or by other users. |
| C-26 | Topic cloud | A topic cloud (i.e., tag cloud) is a visual representation of text data. It is used to depict topics and visualize freeform text. The importance of each topic is shown with font size or color. Topic clouds are useful for rapid perception of the most prominent terms and for locating a term alphabetically to determine its relative prominence. The topics in a topic cloud are usually hyperlinked to items associated with the topic. Topic clouds are useful when representing a user's blog or a community's wiki. |
| C-27 | Wiki | A wiki is an area allowing easy creation and editing of any number of interlinked web pages using a simplified markup language or a text editor. Wikis are a powerful tool to support document-length collaborative knowledge sharing within a group or organization. |

3 Design approach

In principle, we also propose to build Totara Social on Mahara, the open source e-portfolio and social networking application. On this basis, we will design and implement core enhancements and extensions to Mahara, leveraging Mahara’s existing functionality and flexible plugin system whenever possible.

Further, we propose the initial release of Totara Social to be a fully ‘standalone’ enterprise social application ready to be integrated with Totara LMS along several key touch-points as well as ready to be integrated with enterprise applications which support the JSON Activity Streams 1.0 Specification.

Before explaining each of these items in detail, we need to state the design principles.

3.1 Guiding design principles

The following statements will be used to guide the design process of Totara Social:

1. The user experience will be entirely driven by the individual, aside from site-level administration and content moderation by site-level and group-level administrators
2. The user interfaces will be simple, intuitive, and easy to use (in a default installation and after site administrators enable integrations)
3. The user interfaces will be visually scalable (e.g., the activity stream will provide efficient navigation through thousands of activities; the connections page will provide efficient navigation through hundreds of connections; the search results page will provide efficient navigation through thousands of search results)
4. The code structures will allow easy extension via plug-in architectures (e.g., adding new activity types such as “polls” and custom activity properties as needed)
5. The code structures will allow easy customization (including development of custom themes)
6. The design of the user interface, on each page of the platform, will set the platform uniquely apart from other enterprise social platforms (in the same way that Totara LMS is set uniquely apart from other enterprise LMS platforms)

3.2 Mahara as base platform

Mahara is fundamentally an individual-centric content creation and management system, providing individuals the ability to create, manage, store, and display media-rich content. Mahara has been designed and developed to be a highly flexible and extensible platform, including plugin architectures for authentication, content (content types, content block types, content import, and content export), group types, and themes. It also fosters robust group, file sharing, and privacy setting functionality. As such, it will serve as an ideal base platform for Totara Social.

Leverage-able functionality

The following principle concepts of an enterprise social platform (as defined in the previous section) are provided by Mahara out-of-the-box:

| ID | Component | Mahara term | Comment |
|----|-----------|-------------|---------|
|----|-----------|-------------|---------|

| | | | |
|----|------------------|-------------|---|
| 03 | Analytics | Statistics | |
| 05 | Blog | Journal | |
| 08 | Connections | Friends | |
| 09 | Forum discussion | Forum topic | |
| 11 | Inbox | | |
| 12 | Individual | | |
| 14 | Messages | | |
| 15 | Permissions | | |
| 16 | Profile | | Suggest locking profile page block layout for a consistency |
| 19 | Reply | | Limited to forum posts |
| 20 | RSS Feed | | |
| 21 | Search | | Limited to searches for Friends or Groups |
| 22 | Search results | | Limited to searches for Friends or Groups |
| 23 | Share | | Limited to sharing of artefacts like Page or Collection |
| 25 | Topic | Tag | |
| 26 | Topic cloud | Tag cloud | |

The primary focus of the design effort related to these components will be in transforming their look and feel in alignment with a competitive, modern enterprise social platform, as well as integrating them within the site-wide navigational architecture of the same kind of platform.

Terminology changes

We propose to make the following terminology changes to the base platform to align with a universal business audience (based on the differences shown in the table above).

- Replace “statistics” with “analytics”
- Replace “journal” with “blog”
- Replace “friends” with “connections”
- Replace “topic” with “discussion” (in the context of forums)
- Replace “tag” with “topic” / Replace “tag cloud” with “topic cloud”

Points of difference

Mahara includes four key features which will allow Totara Social to stand out from other enterprise social platforms: Pages, Page Collections, Resume/Resume Builder, and Welcome Page. We’ve captured these concepts in the table below.

| ID | Concept | Comments |
|----|-------------------------|--|
| 28 | Page / Page Collection | A Page is an individual, group, or administrator managed area in which content can be added and organized for consumption by other users. Individuals can add a page to their profile. Group administrators, group moderators (and regular group members depending on group permissions) can add pages to the group homepage. A Page Collection is a collection of pages organized together. |
| 29 | Resume / Resume Builder | A Resume is a statement of an individual’s work history and skills, used to communicate the individual’s education, background and experience. A Resume |

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|----|--------------|--|
| | | Builder is a tool to allow individuals to easily build a resume using interactive tools. |
| 32 | Welcome Page | A Welcome Page is a feature which allows new users to become quickly familiarized with the application, and to rapidly get started using it. It includes descriptions of the main functionality and provides a basic set of instructions to get started. It may also include a dashboard to allow users to have a broad overview of recent activity and updates. |

3.3 Enhancements to Mahara

The table below captures the remaining concepts which Totara Social must realize to be competitive with other enterprise social platforms (based on the table defined in the previous section), and provides comments about how we plan to achieve each concept. Note, we believe there is one exception (Wiki) as noted below.

| ID | Concept | Comment |
|----|-----------------|---|
| 01 | Activity | Based on the JSON Activity Stream 1.0 Specification |
| 02 | Activity stream | |
| 04 | Answer | A type of Activity to appear in Activity Streams |
| 06 | Chat | Will leverage a robust open source chat server and interface (refer to the Technical Considerations section below for detail) |
| 07 | Company | A type of mandatory group automatically created on a Totara Social install. All users will be automatically (and silently) added to the group. |
| 10 | Idea | A type of Activity to appear in Activity Streams |
| 13 | Like | An interactive feature to be added to all activity items in Activity Streams |
| 17 | Questions | A type of Activity to appear in Activity Streams |
| 18 | Recommendations | Will leverage a robust, open source recommendation engine and search server (refer to the Technical Considerations section below for detail) |
| 24 | Status updates | A type of Activity to appear in Activity Streams |
| 27 | Wiki | Deferred. We propose to hold on the inclusion of wiki functionality into Totara Social for the foreseeable future because as we currently believe wikis should operate as standalone systems which can be integrated with Totara Social via Activity Streams. |

We expect the bulk of the Totara Social feature development effort will be in realizing the activity streams, both their supporting their activity types (status updates, question/answer, idea), activity stream types (Home Stream, Group Stream, and Company Stream), and the interactions within them (likes, shares, replies, etc).

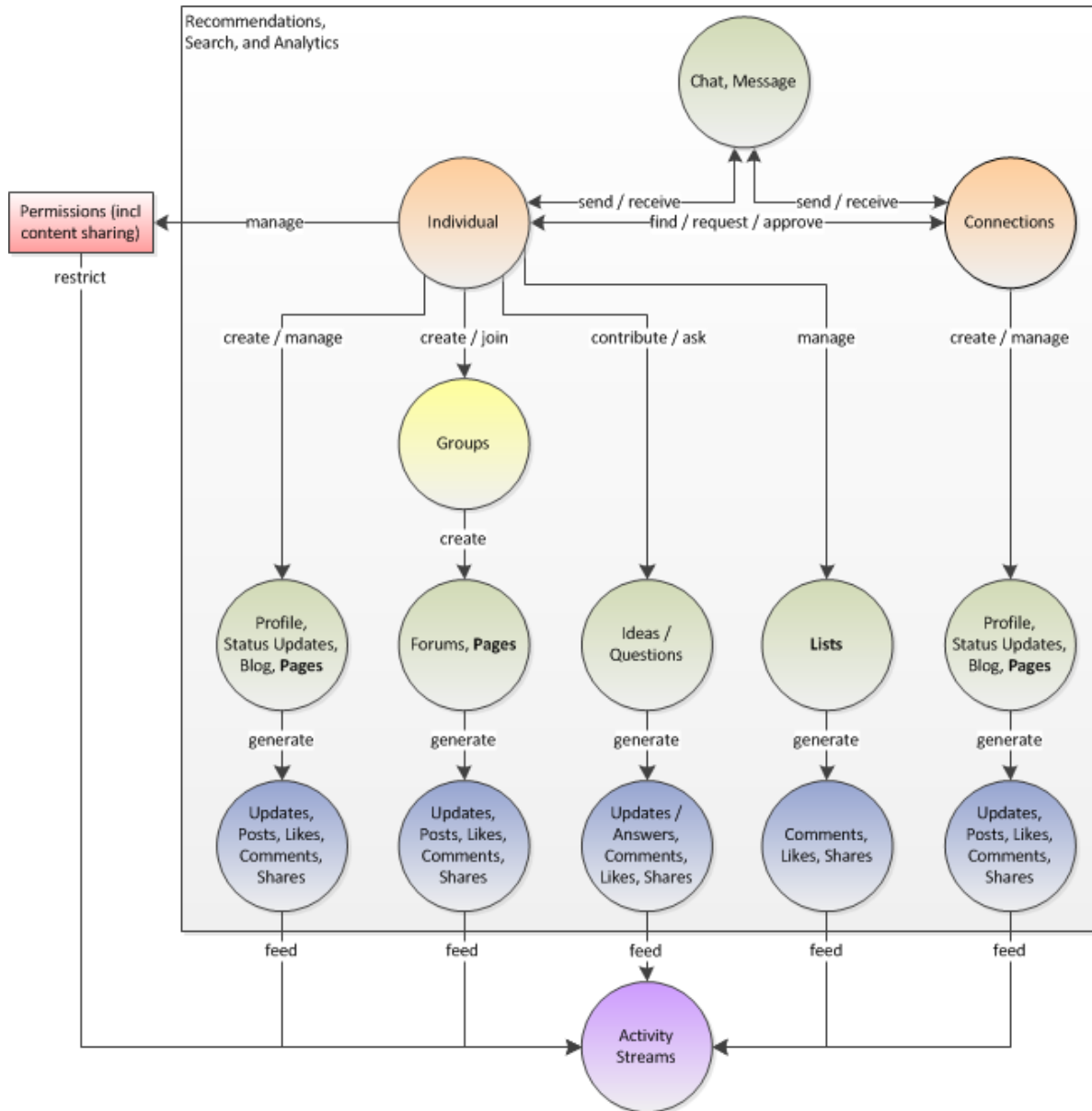
We propose to design a user experience of the activity streams feature is familiar to end users by being functionally similar to activity streams found in other modern, popular online social networking/media platforms such as Facebook, Google+, LinkedIn, and Twitter, yet has with the same distinctive design

qualities that have uniquely set Totara LMS apart--from a design perspective--from other enterprise LMS platforms.

In addition to implementing the core enterprise social concepts, we believe Totara Social must include two features (lists and screenshare functionality) to give users a far more compelling experience in the social platform, compared with the platforms provided by the largest competitors in the market. These two concepts are described in detail in the table below.

| ID | Concept | Comments |
|----|-------------|--|
| 33 | Lists | <p>Lists (i.e., 'knowledge lists') are individually-managed sequence of meaningful activity stream items (e.g., ideas, questions, answers, status updates, forum posts—and their comments), which can be reordered or shared with other users.</p> <p>Lists makes it easy to track important, memorable activity stream items within the platform without having to scroll through active activity streams or look through search results.</p> <p>Similar to social bookmarking, lists allow individuals to collect and curate the most important activity items they have read (or created), so they can quickly return to them whenever necessary.</p> <p>Individuals can create an unlimited number of lists, and can drag-and-drop items in a list to reorder them. Individuals can add activity stream items directly from activity streams (via a list icon which expands a drop-down menu of available lists.</p> <p>A further benefit of lists is that they can be used to allow users to track informal learning which is relevant for formal assessments (e.g., competency, performance, etc).</p> |
| 34 | Screenshare | <p>A Screenshare is an audio/video recording made by an individual while sitting at their desktop or laptop. A screenshare can be recorded within the enterprise social platform by pressing a record button.</p> <p>The screenshare feature must be embedded in the application rely on the browser (with any third-party plugins or special configurations) to access the user's microphone and desktop. It must also allow the user to preview the recording before it is published for other users to see.</p> |

The diagram below is a conceptual diagram of Totara Social running standalone, showing the key conceptual points of differences to a typical enterprise social platform **in bold** (i.e., Pages and Lists).



3.4 Activity Stream integration with enterprise applications

Socializing enterprise activities in an online social network introduces a wide range of benefits to the performance of an organization. To allow Totara Social to deliver these values to its user base, we propose to implement the JSON Activity Streams 1.0 Specification because it is an open standard, it is

straightforward to implement, and it is experiencing rapidly widening adoption across the enterprise application market (competitor implementations include Yammer, SocialCast, and Tibber Tibco).

The Activity Streams format is now maintained by the OpenSocial Foundation (a non-profit entity jointly led by Yahoo, Google, and MySpace). The JSON Activity Streams 1.0 Specification has been adopted in OpenSocial since the release of OpenSocial 2.0 in 2011. The specification is available here: <http://activitystrea.ms/specs/json/1.0/>

The table below contains draft requirements related to the integration of Totara Social with core applications and processes which have implemented the JSON Activity Stream 1.0 Specification.

| ID | Requirement | Comments |
|---|---|----------|
| Totara Social – Administrator settings | | |
| R-01 | Ability for Administrator to configure an external activity feed source for external systems (i.e., adjacent collaboration, content, portal, talent, productivity applications) | |
| Totara Social – Activity stream | | |
| R-02 | Ability for events in external systems to appear as activities in an individual’s activity stream (including relevant titles, descriptions, thumbnails, urls, and hyperlinked employee names) | |
| R-03 | Ability for individuals to interact with activities feed from external systems in a way they can with activities generated within Totara Social (e.g., like, share, reply, etc). | |

3.5 Totara LMS integration

We believe there is a very wide range of touchpoints between Totara Social and Totara LMS.

Enhancements to Totara Social components

The table below captures draft requirements related to the functionality of Totara Social components, which will be enhanced by the integration of Totara Social with Totara LMS.

| ID | Requirement | Comments |
|--|--|---|
| HR integration hooks | | |
| R-04 | Ability for HR integration data (user demographics such as title, manager, location, organization) to be fed to Totara Social from Totara LMS. | |
| Homepage – Top Contributors block | | |
| R-05 | Ability for list of top contributors to be filtered by the individual’s HR data (i.e., an individual will see top contributors only in their part of the organization, in their location, or with the same position) | Will need to decide the basis for the logic. |
| Activity stream | | |
| R-06 | Ability for individuals to flag content (ideas, questions, or answers) in the their Totara Social activity stream as competency evidence items in their Learning Plans in Totara LMS, or as evidence for a performance | The list concept could potentially support this |

| | | |
|---|---|--|
| | appraisal. | |
| R-07 | Ability for course enrolments to appear as activities in an individual's activity stream (e.g., 'Jane Foster enrolled the Leadership Insights course') | |
| R-08 | Ability for program enrolments to appear as activities in an individual's activity stream (e.g., 'Jane Foster was enrolled the Leadership Development 2013 program') | |
| R-09 | Ability for face-to-face sign-ups to appear in an individual's activity stream (e.g., 'Jane Foster signed-up for the Leadership Insights workshop on Monday March 1, 2013 9:00 – 10:00am') | |
| R-10 | Ability for face-to-face attendance to appear in an individual's activity stream (e.g., 'Jane Foster attended the Leadership Insights workshop on Monday March 1, 2013 9:00 – 10:00am') | Possible integration via Tin Can API |
| R-11 | Ability for course completions to appear in an individual's activity stream (e.g., 'Jane Foster completed Leadership Insights 2013 course') | Possible integration via Tin Can API |
| R-12 | Ability for program completions to appear in an individual's activity stream (e.g., 'Jane Foster completed Leadership Development 2013 program') | Possible integration via Tin Can API |
| R-13 | Ability for badges issued in Totara LMS to appear in an individual's activity stream (e.g., 'Jane Foster earned the Top Participant badge in the Adaptive Your Work Environment course') | Integration with Open badges required |
| Recommendations | | |
| R-14 | <p>Ability to recommend connections (i.e., 'people to follow') based on HR data stored in Totara Social. Examples include:</p> <ul style="list-style-type: none"> • Users in your organization in the organizational hierarchy • Users with the same job code • Users with the same position custom field like job family • Users in the same audiences • Users with a similar line manager • Users with a similar city • Users with a similar country | Ranking by relevance will be required. Users in the same audiences may be too broad, and may need to restricted audiences of a certain size. |
| Profile | | |
| R-15 | Ability for user custom user fields which are visible in Totara LMS profiles to be visible in Totara Social profiles via the HR integration hooks (e.g., title, position, manager, organization, date joined, job join date) | |
| R-16 | Ability for badges earned in Totara LMS to appear in an individual's Totara Social profile | Integration with Open badges required |
| Groups | | |
| R-17 | Ability for groups in Totara Social to be automatically created and populated based on course enrolments in Totara LMS | |
| R-18 | Ability for groups in Totara Social to be automatically created and populated based on program enrolments in Totara LMS | |
| Journal (personal reflection areas in Totara Social) | | |

| | | |
|--------------------|--|--|
| R-19 | Ability for journal entries to be automatically created in Totara Social when learning activities are completed in Totara | |
| Permissions | | |
| R-20 | Ability to choose if updates for course enrolments in Totara LMS are automatically published on an individual's Totara Social activity stream (e.g., 'Jane Foster enrolled the course Leadership Insights') | |
| R-21 | Ability to choose if updates for programs enrolments in Totara LMS are automatically published on an individual's Totara Social activity stream (e.g., 'Jane Foster was enrolled the program Leadership Development 2013') | |
| R-22 | Ability to choose if updates for course completions in Totara LMS are automatically published on an individual's Totara Social activity stream (e.g., 'Jane Foster completed Leadership Insights 2013 Course') | |
| R-23 | Ability to choose if updates for program completions in Totara LMS are automatically published on an individual's Totara Social activity stream | |

Enhancements to Totara LMS

The table below captures requirements affecting Totara LMS which we plan to initially focus on.

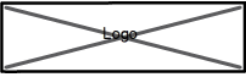
| ID | Requirement | Comments |
|--|--|----------|
| HR integration hooks | | |
| R-24 | Ability for HR integration data (user demographics such as title, manager, location, organization) to be fed to Totara Social from Totara LMS. | |
| Viewing others' profile in Totara LMS | | |
| R-25 | Ability for an individual see on another user's Totara LMS profile whether the individual is connected the user | |
| R-26 | Ability for an individual to invite to connect (in Totara Social) another users by viewing the other user's profile page in Totara LMS | |
| Find Learning – Courses: Functionality within Totara LMS's Find Learning area (for courses) to be integrated with Totara Social | | |
| R-27 | Ability to ask questions about courses | |
| R-28 | Ability to view questions asked about courses | |
| R-29 | Ability to answer questions about courses | |
| R-30 | Ability to view answers given to questions asked about courses | |
| R-31 | Ability to "like" courses | |
| R-32 | Ability to "like" questions about courses | |
| R-33 | Ability to "like" answers to questions asked about courses | |
| R-34 | Ability to reply to questions about courses | |
| R-35 | Ability to reply to answers to questions about courses | |
| R-36 | Ability to share questions about courses | |
| R-37 | Ability to share answers to questions about courses | |
| R-38 | Ability to share a courses with all of an individual's connections | |
| R-39 | Ability to share a courses with groups | |
| Find Learning – Courses: Functionality within Totara LMS's Find Learning area (for programs) to be | | |

| | | |
|------------------------------------|--|--|
| integrated with Totara Social. | | |
| R-40 | Ability to ask questions about programs | |
| R-41 | Ability to view questions asked about programs | |
| R-42 | Ability to answer questions about programs | |
| R-43 | Ability to view answers given to questions asked about programs | |
| R-44 | Ability to “like” programs | |
| R-45 | Ability to “like” questions about programs | |
| R-46 | Ability to “like” answers to questions asked about programs | |
| R-47 | Ability to reply to questions about programs | |
| R-48 | Ability to reply to answers to questions about programs | |
| R-49 | Ability to share questions about programs | |
| R-50 | Ability to share answers to questions about programs | |
| R-51 | Ability to share a programs with all of an individual’s connections | |
| R-52 | Ability to share a programs with groups | |
| My Team – Manager Dashboard | | |
| R-53 | Ability for Manager to see Totara Social analytics regarding their direct reports in their dashboard | |
| My Team | | |
| R-54 | Ability for Manager to see analytics for direct reports in the My Team page (i.e., Totara Social metrics like # ideas, # questions, # answers) | |

4 Draft wireframes

The following section contains draft wireframes of key pages in the platform. These are only rough concepts to collect feedback on the site architecture, arrangement, and conceptual design.

4.1 Home with activities from status updates



Phil Carol

Home

- [Home](#)
- [Inbox \(23\)](#)
- [Questions](#)
- [Ideas](#)
- [Lists](#)
- [Groups](#)

People

Update Status
Ask a question
Contribute an idea

Suggested connections [More](#)

- [Carol Dempsey](#)
Vice President Sales N.A.
- [Jessica Blake](#)
Testing Lab Manager
- [Cassandra Bell](#)
Chief Legal Counsel
- [James Packard](#)
Manager of Special Oper...

Group streams
[More](#)

- [All Company](#)
- [Coaching Programs](#)
- [Executive Development](#)
- [Learning & Development](#)
- [Mentorship Opportunities](#)
- [Performance Management](#)

Suggested groups
[More](#)

- [Customer Relations Team](#)
211 members
- [Customer Service](#)
421 members
- [Emerging Technology](#)
116 members
- [Helpdesk Support Team](#)
154 members

Suggested ideas
[More](#)

- [Benchmarking program effectiveness on organizational performance](#)
821 views, 46 comments, 26 shares
- [Launching learning initiatives aligned with strategic goals](#)
581 views, 23 comments, 19 shares
- [3 ways the new Field Service app can save you productive hours each week](#)
304 views, 49 comments, 23 shares
- [Top 10 top customer education lessons we learned in 2012](#)
41 views, 9 comments, 3 shares

Clint Benson > Learning & Development Group
Dec 20 2012 at 1:17pm

Team: Here's the initial draft of the #Totara Social Design Document.

[Totara Social Design Doc v0-1 Dec 20 2012](#)

11 people like this. [View conversation](#)

[Natasha Polanski](#) Dec 20 2012 at 2:54pm

Great job! My comments here!

[Totara Social Design Doc v0-1 Dec 20 2012 - NR](#)

[Maria Henderson](#) Dec 20 2012 at 3:11pm

Awesome! Here's my feedback!

[Totara Social Design Doc v0-1 Dec 20 2012 - MH](#)

[Clint Benson](#) Dec 20 2012 at 3:33pm

Thanks @Natasha Polanski and @Maria Hill! Terrific feedback! I've included your comments in this version!

[Totara Social Design Doc v0-2 Dec 20 2012](#)

8 people like this. 2 people replied. [View conversation](#)

Peggy Carson > Learning & Development Group
Dec 15 2012 at 9:44am

The upgrade of our #Totara LMS has enabled some incredible new business processes! Our Admins absolutely love the new Audience Management feature! We've shared a demo here so you can see it in action.

81 people like this. [View conversation](#)

21 people replied. [View conversation](#)

Clint Benson > Learning & Development Group
Dec 14 2012 at 8:31am

Just started on a rough #UX design of #Totara Social.

7 people like this. [View conversation](#)

[Natasha Polanski](#) Dec 14 2012 at 8:46am

Great! I've got six departments who need it very urgently!

[Phil Carol](#) Dec 14 2012 at 8:53am


Can't wait to see it! I bet Mahara has never looked so good!

[Clint Benson](#) Dec 14 2012 at 9:02am

Thanks @Phil Carol! I've seen a draft of your work on Totara LMS's new #Performance Management feature. Looking

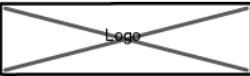
11 people like this. [View conversation](#)

[More](#)



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4.2 Home with activities from Totara Social interactions



Phil Carol ▾

Home

- Home
- Inbox (23)
- Questions
- Ideas
- Lists
- Groups

People ▾

Update Status
Ask a question
Contribute an idea

Clint Benson joined the group **Mentorship Opportunities** 2 hours ago

This group is intended to foster personal development relationships between seasoned employees and younger staff. [More](#)

18 people are members

2 people like this. [share](#)

3 people replied. [Show conversation](#)

Add a reply...

Peggy Reynolds added a page to her **Profile** 3 hours ago

My favorite resources and quotes for quality executive management

4 people like this. [share](#)

8 people replied. [Show conversation](#)

Add a reply...

Erik Michaels updated his **Resume** 4 hours ago

7 New experience areas added. [More](#)

15 people like this. [share](#)

3 people replied. [Show conversation](#)

Add a reply...

Erik Michaels made 5 new **Connections** 4 hours ago

Amy Vintelli

Ben Snyder

Komla Botchwey

James Butler added a file to his **Profile** 4 hours ago

What went right - Analysis of our last ten most successful IT projects

33 people like this. [4 shares](#)

17 people replied. [Show conversation](#)

Add a reply...

Chester Peteson added a journal entry to his **Profile** 5 hours ago

The 90-day product development cycle - Why we should do it as a rule

18 person like this. [share](#)

9 people replied. [Show conversation](#)

Add a reply...

Martine Berléand made 1 new **Connection** 8 hours ago

Alexia Piccoli

[More](#)

Suggested connections [More](#)


- Carol Dempsey**
Vice President Sales N.A.
- Jessica Blake**
Testing Lab Manager
- Cassandra Bell**
Chief Legal Counsel
- James Packard**
Manager of Special Oper...

Trending topics [More](#)

- ▼ #Adaptive Learning
- ▼ #UX Design
- ▼ #Performance Management
- ▼ #Project Tin Can
- ▼ #Totara Social

Chat [Options ▾](#)


- Jane Edwards**
Director of Engineering ●
- Erik Michaels**
Director of Research & ... ●
- Peggy Reynolds**
Vice President of Learning... ●
- Abraham Epstein**
Vice President of Biotech... ●
- Chester Peterson**
Director of Operations ●
- James Butler**
Senior Developer ●



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Totara Social

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4.3 Home with activities from integrated enterprise applications



Phil Carol

Home

- Inbox (23)
- Questions
- Ideas
- Lists
- Groups

People

Update Status
Ask a question
Contribute an idea

Sort

Clint Benson commented on a course in the **LMS** 2 hours ago

This new course is up-to-date, insightful, and highly thought-provoking. Within hours of finishing the course, I was putting its guidance into practice. I recommend to everyone involved with **#Agile Project Management!**

Agile Project Management for Channeling Innovation

This course explains the six principles of Agile Project Management, and provides guidance on how they should be used to capitalize on emerging new product development tech... [More](#)

55 people completed this course [Enrol now](#)

11 people like this. 6 shares [Agile Projects](#)

3 people replied. [Show conversation](#)

Add a reply...

Peggy Reynolds created a new opportunity in the **CRM** 3 hours ago

Global Technology Operations Corp. - Global Outreach Initiative

2 people like this. share [Agile Projects](#)

3 people replied. [Show conversation](#)

Add a reply...

Erik Michaels completed a program in the **LMS** 4 hours ago

Executive Development Program (EDP)

9 people completed this program [Enrol now](#)

15 people like this. share [Agile Projects](#)

3 people replied. [Show conversation](#)

Add a reply...

James Butler closed an opportunity (closed-win) in the **CRM** 4 hours ago

AstroLinkSys Corp. - Community Development Support Project

33 people like this. 4 shares [Agile Projects](#)

3 people replied. [Show conversation](#)

Add a reply...

Erik Michaels and **Vyn Li** completed a course in the **LMS** 5 hours ago

Customer Enablement Process - Level 1 (CEP L1)

42 people completed this course [Enrol now](#)

1 person like this. share [Agile Projects](#)

2 people replied. [Show conversation](#)

Add a reply...

More

Suggested connections [More](#)

- Carol Dempsey**
Vice President Sales N.A.
- Jessica Blake**
Testing Lab Manager
- Cassandra Bell**
Chief Legal Counsel
- James Packard**
Manager of Special Oper...

Trending topics [More](#)

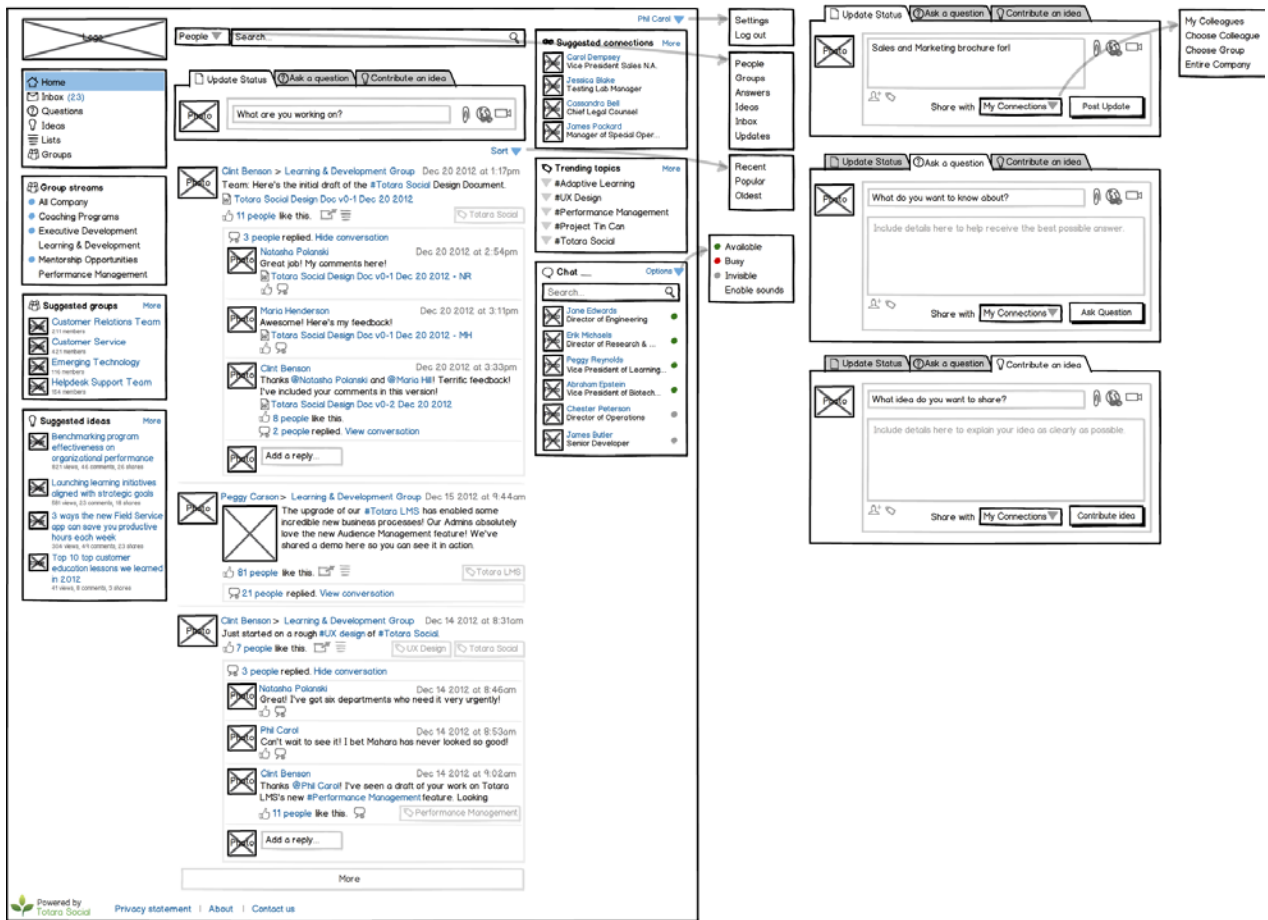
- #Adaptive Learning
- #UX Design
- #Performance Management
- #Project Tin Can
- #Totara Social

Chat [Options](#)

- Jane Edwards**
Director of Engineering
- Erik Michaels**
Director of Research & ...
- Peggy Reynolds**
Vice President of Learning...
- Abraham Epstein**
Vice President of Biotech...
- Chester Peterson**
Director of Operations
- James Butler**
Senior Developer

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4.4 Home with interaction detail



The screenshot displays the Totara Social Home interface with several callout boxes highlighting key interaction elements:

- Navigation and Search:** A top navigation bar includes "Home", "Inbox (23)", "Questions", "Ideas", "Lists", and "Groups". A search bar is located at the top right.
- Group Streams:** A sidebar on the left lists various group streams such as "All Company", "Coaching Programs", "Executive Development", "Learning & Development", "Mentorship Opportunities", and "Performance Management".
- Suggested Groups:** A section below group streams lists suggested groups like "Customer Relations Team", "Customer Service", "Emerging Technology", and "Helpdesk Support Team".
- Suggested Ideas:** A section below suggested groups lists suggested ideas such as "Benchmarking program effectiveness on organizational performance", "Launching learning initiatives aligned with strategic goals", "3 ways the new Field Service app can save you productive hours each week", and "Top 10 top customer education lessons we learned in 2012".
- Content Feed:** The main area shows a feed of posts from various groups and individuals, including posts from "Learning & Development Group" and "Totara Social".
- Interaction Callouts:**
 - Update Status:** A callout box shows a status update form with options to "Update Status", "Ask a question", and "Contribute an idea".
 - Share with My Connections:** A callout box highlights the "Share with My Connections" button.
 - Post Update:** A callout box highlights the "Post Update" button.
 - Ask Question:** A callout box highlights the "Ask Question" button.
 - Contribute Idea:** A callout box highlights the "Contribute Idea" button.
 - My Colleagues:** A callout box highlights the "My Colleagues" button, which includes options to "Choose Colleague", "Choose Group", and "Entire Company".
 - Settings and Log out:** A callout box highlights the "Settings" and "Log out" buttons.
 - People Groups:** A callout box highlights the "People Groups" button, which includes options for "Answers", "Ideas", "Idea", and "Updates".
 - Recent Popular Oldest:** A callout box highlights the "Recent", "Popular", and "Oldest" sorting options.
 - Available, Buy, Inactive, Enable sounds:** A callout box highlights the "Available", "Buy", "Inactive", and "Enable sounds" options.
- Footer:** The footer includes "Powered by Totara Social", "Privacy statement", "About", and "Contact us".

4.5 Profile



People


Phil Carol

- [Home](#)
- [Inbox \(23\)](#)
- [Questions](#)
- [Ideas](#)
- [Lists](#)
- [Groups](#)

- Group streams**
- [All Company](#)
- [Coaching Programs](#)
- [Executive Development](#)
- [Learning & Development](#)
- [Mentorship Opportunities](#)
- [Performance Management](#)

- Suggested groups**
- [Customer Relations Team](#)
211 members
- [Customer Service](#)
423 members
- [Emerging Technology](#)
116 members
- [Helpdesk Support Team](#)
64 members

- Suggested ideas**
- [Benchmarking program effectiveness on organizational performance](#)
821 views, 46 comments, 26 shares
- [Launching learning initiatives aligned with strategic goals](#)
581 views, 23 comments, 18 shares
- [3 ways the new Field Service app can solve you productive hours each week](#)
304 views, 48 comments, 23 shares
- [Top 10 top customer education lessons we learned in 2012](#)
41 views, 9 comments, 3 shares




Phil Carol

Title: Manager of Learning & Development
Department: Strategy and Logistics
Region: North America
Office: Tulsa, OK
Email: phil.carol@corporate.com

Connections:

Contributions (121)
Pages (9)
Files (5)
Groups (4)
Resume

Status updates (38)




Phil Carol Dec 20 2012 at 1:17pm

[Coaching for Success program relaunched](#)

After gathering lots of incredible feedback and recrafting the program over the past six months, we're very pleased to relaunch this very successful program.

41 people like this.



Phil Carol Dec 20 2012 at 1:17pm





[Impressions from Executive Coaching Conference 2012](#)

My notes from the 2-day conference last March in NYC. Overall an excellent conference. Lots of incredible insights.

30 people like this.

[More](#)

Suggested connections







-  [Carol Dempsey](#)
Vice President Sales NA.
-  [Jessica Blake](#)
Testing Lab Manager
-  [Cassandra Bell](#)
Chief Legal Counsel
-  [James Packard](#)
Manager of Special Oper...

Trending topics


- [#Adaptive Learning](#)
- [#UX Design](#)
- [#Performance Management](#)
- [#Project T in Can](#)
- [#Totara Social](#)

Chat

Search...

-  [Jane Edwards](#)
Director of Engineering
-  [Erik Michael](#)
Director of Research & ...
-  [Peggy Reynolds](#)
Vice President of Learning...
-  [Abraham Epstein](#)
Vice President of Biotech...
-  [Chester Peterson](#)
Director of Operations
-  [James Butler](#)
Senior Developer

Questions (15)



Phil Carol Dec 14 2012 at 12:01pm

[Global partnerships with educational institutions for coaching certifications](#)


Looking to build or expand linkages with higher education institutions in the following regions: France, Germany, Italy, Japan, US, UK, Singapore. Any references to adequate #coaching #certification programs would be terrific.

[Certification programs](#) [Coaching](#)

10 people like this.

[More](#)

Answers (31)




Clint Benson > All Company Dec 20 2012 at 1:17pm

[How are you helping the organization build an adaptive culture?](#)

41 people like this. [Adaptive culture](#)

34 people replied. [Show entire conversation](#)




Phil Carol Dec 20 2012 at 3:33pm

Two ways:

- 1) Fostering a collaborative approach across the enterprise and promoting continuous learning among the workforce, with particular emphasis on active learning over passive, classroom-based approaches.
- 2) Using advanced #knowledge management tools to extracting relevant front-line experiences and moving them into learning programs and knowledge bases that quickly get the best knowledge and experience to the entire organization.


[Knowledge management](#)

8 people like this.
2 people replied. [View conversation](#)

 [Add a reply...](#)

[More](#)

Ideas (18)



Phil Carol Dec 11 2012 at 11:10am


[Detailed comparative analysis of coaching programs offered](#)

I think we as a team should undertake a detailed comparison of programs offered, which can be used as a baseline for new coaching programs offered.


[Coaching Programs](#)

41 people like this.

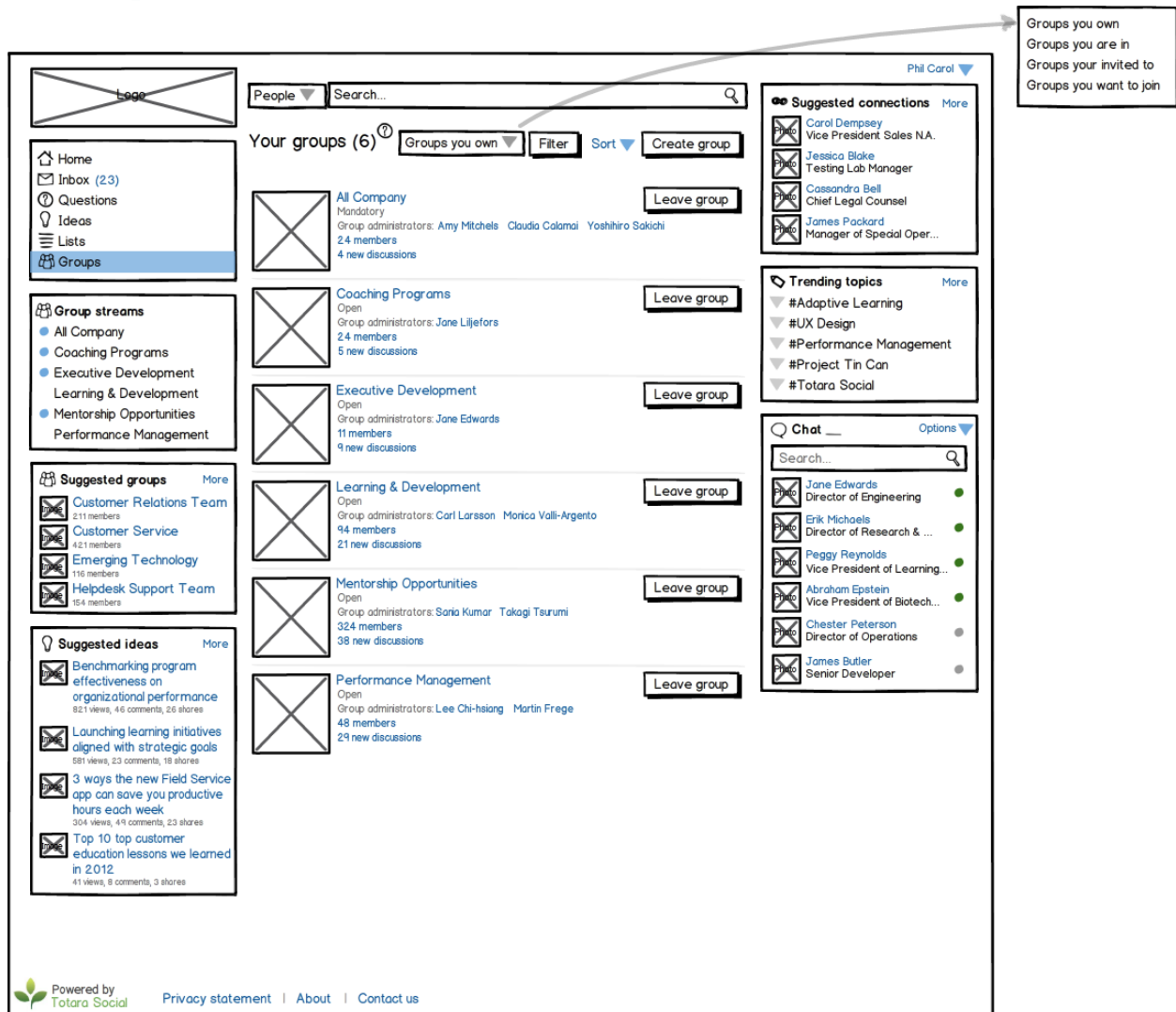
34 people replied. [Show conversation](#)

 [Add a reply...](#)

[More](#)

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4.6 Groups



The screenshot displays the 'Groups' section of the Totara Social interface. On the right side, a callout box lists the following categories:

- Groups you own
- Groups you are in
- Groups your invited to
- Groups you want to join


An arrow points from this callout box to the 'Groups you own' filter button located in the 'Your groups (6)' section of the main interface.

The main interface shows a list of groups under the heading 'Your groups (6)'. The groups listed are:

- All Company**: Mandatory, 24 members, 4 new discussions. Administrators: Amy Mitchels, Claudia Calamai, Yoshihiro Sakichi.
- Coaching Programs**: Open, 24 members, 5 new discussions. Administrator: Jane Liljefors.
- Executive Development**: Open, 11 members, 9 new discussions. Administrator: Jane Edwards.
- Learning & Development**: Open, 94 members, 21 new discussions. Administrators: Carl Larsson, Morica Valli-Argento.
- Mentorship Opportunities**: Open, 324 members, 38 new discussions. Administrators: Sana Kumar, Takagi Tsurumi.
- Performance Management**: Open, 48 members, 29 new discussions. Administrators: Lee Chi-hsiang, Martin Frege.

Other sections visible include 'Suggested groups', 'Suggested ideas', 'Suggested connections', 'Trending topics', and 'Chat'.

4.7 Group



Phil Carol ▾

Logo

- Home
- Inbox (23)
- Questions
- Ideas
- Lists
- Groups

Group streams

- All Company
- Coaching Programs
- Executive Development Learning & Development
- Mentorship Opportunities
- Performance Management

Suggested groups More

- [Customer Relations Team](#)
211 members
- [Customer Service](#)
421 members
- [Emerging Technology](#)
116 members
- [Helpdesk Support Team](#)
154 members

Suggested ideas More

- [Benchmarking program effectiveness on organizational performance](#)
821 views, 46 comments, 26 shares
- [Launching learning initiatives aligned with strategic goals](#)
581 views, 23 comments, 18 shares
- [3 ways the new Field Service app can save you productive hours each week](#)
304 views, 49 comments, 23 shares
- [Top 10 top customer education lessons we learned in 2012](#)
41 views, 8 comments, 3 shares

People ▾ Search...

You are a member of this group.

[Leave group](#)

Coaching Programs

Start a discussion or share something with the group...

About
Members (24)
Forums (11)
Pages (9)
Share
Files (15)

Dedicated to sharing best practices and tips related to programs on coaching.

Group type: Open
Created on: 1 April 2011
Group administrators:

[Jane Lijefors](#)

Recent forum posts

[Strategic partnering globally with educational institutions for coaching certifications](#)
Looking to build or expand linkages with higher education institutions in the following regions: France, Germany, Italy, Japan, US, UK, Singapore. Any references to adequate coaching programs would be terrific.

[New "Coaching for Success" program launched](#)
After gathering lots of incredible feedback and recrafting the program over the past six months, we're very pleased to relaunch this very successful program.

[Impressions from Executive Coaching Conference 2012](#)
My notes from the two day conference last March in NYC.

[See all pages](#)

Recently added Group pages

[Comparative Analysis of Coaching Programs Offered](#)
Comparison of programs offered, which can used as a baseline for new coaching programs offered.

[Coaching Programs](#)

Suggested connections More

- [Carol Dempsey](#)
Vice President Sales N.A.
- [Jessica Blake](#)
Testing Lab Manager
- [Cassandra Bell](#)
Chief Legal Counsel
- [James Packard](#)
Manager of Special Oper...


Trending topics More

- ▾ [#Adaptive Learning](#)
- ▾ [#UX Design](#)
- ▾ [#Performance Management](#)
- ▾ [#Project Tin Can](#)
- ▾ [#Totara Social](#)

Chat Options ▾

Search...

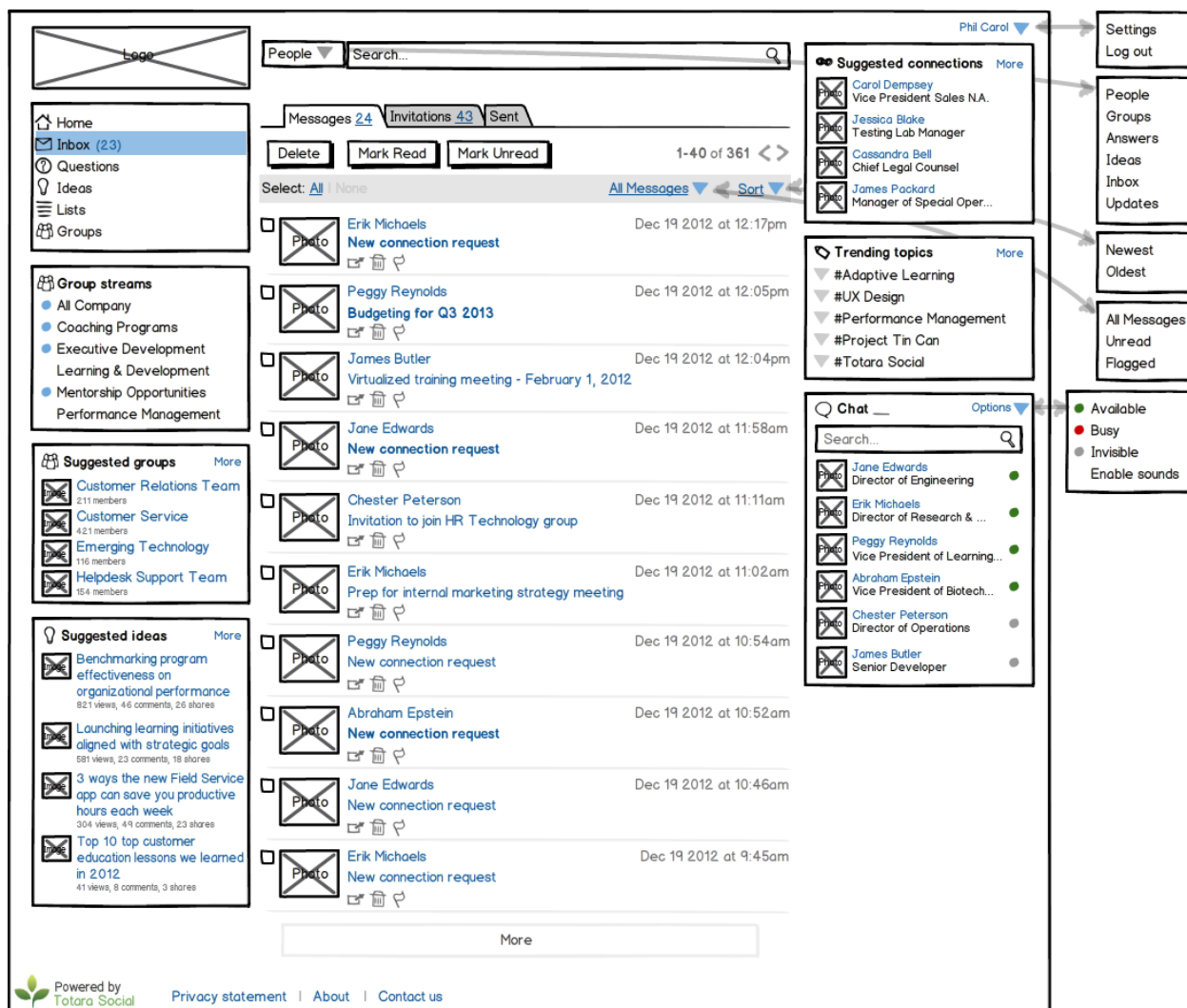
- [Jane Edwards](#)
Director of Engineering ●
- [Erik Michaels](#)
Director of Research & ... ●
- [Peggy Reynolds](#)
Vice President of Learning... ●
- [Abraham Epstein](#)
Vice President of Biotech... ●
- [Chester Peterson](#)
Director of Operations ●
- [James Butler](#)
Senior Developer ●



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4.8 Inbox



The screenshot illustrates the 'Inbox' feature of Totara Social. It includes a navigation sidebar on the left, a central message list, and several right-hand panels for suggested connections, trending topics, and chat. A settings sidebar on the far right provides additional navigation and status options.

5 Technical considerations

In this section, we present how our plans to implement the technically-complex components which do not presently exist in the Mahara codebase.

5.1 Chat

We propose to power Totara Social's real-time chat feature with Ajax IM (<http://ajaxim.com/>), xmpphp (<http://code.google.com/p/xmpphp/>), or an alternative, suitably scalable, embeddable, open source chat application implemented in PHP.

5.2 Recommendation engine

We propose to power Totara Social's real-time search and recommendation engine with Apache Solr search server which includes the Apache Lucene search library. Solr/Lucene's key features include powerful full-text search, hit highlighting, facet search, dynamic clustering, database integration and rich document (e.g., Word, PDF) handling.

Beyond its search capabilities, Solr/Lucene is a high-performance, highly-scalable, fully-featured token-matching and scoring library – the necessary basis for a recommendation engine. All searchable content can form the basis of matching and scoring (e.g., text, attributes, locations, user behaviors and classifications). From a machine learning perspective, Solr/Lucene's index is a multi-dimensional sparse matrix with very fast and powerful look-up capabilities.

Early builds of Mahara included the Solr/Lucene plugin based on Solr 1.3, however the Solr/Lucene plugin was removed due to lack of support by the Mahara core team and community (refer to <https://mahara.org/interaction/forum/topic.php?id=848>). We propose to develop a new plugin based on Solr 4.0 GA, which was released on October 12 2012.

Solr provides a variety of the necessary recommendation approaches including attribute based, hierarchical classification, textual-similarity based, behavior-based (i.e., collaborative filtering), concept based, and hybrid approaches. For example, behavior-based recommendations can find users who like the same content, or find content liked by similar users. Solr also includes Carrot2, an unsupervised machine learning algorithm, which can cluster documents and dynamically discover concepts without a dictionary.

Totara Social will include default boosting of search term and documentations, as well as scoring, bucket weights, and payloads. Totara Social administrators will be able to tweak these settings as needed.

Sources:

- Building a Real-time, Solr-powered Recommendation Engine (<http://www.slideshare.net/treygrainger/building-a-real-time-solrpowered-recommendation-engine>)
- Solr Wiki (<http://wiki.apache.org/solr/Solr4.0>)
- Wikipedia (http://en.wikipedia.org/wiki/Apache_Solr)

A potential alternative to Solr is elasticsearch, also built on Lucene.

5.3 Screenshare

The following links provide references to a few alternative approaches which can be leveraged to implement screenshare functionality using HTML5:

- Screensharing a browser tab in HTML5 (<http://www.html5rocks.com/en/tutorials/streaming/screenshare>)

- noVNC project homepage (<http://kanaka.github.com/noVNC/>)
- Guacamole homepage (<http://guac-dev.org/>)

6 Future considerations with OpenSocial

OpenSocial, which was originally developed for interoperability between social networking platforms, has opened the door to new types of interoperability between enterprise social platforms and enterprise applications. The primary goal of OpenSocial is to provide a common framework developers can use to ensure interoperability across various social networks on the Internet, which act as containers for each OpenSocial-compliant specification.

OpenSocial is supported by incumbent industry leaders in the social enterprise software space including Google, LinkedIn, Salesforce.com, IBM, Oracle, and SAP. Implementations include Cisco, Jive, Atlassian, IBM SmartCloud, Google, Yahoo, Liferay, Oracle, Magento, Tibco Tibbr. OpenSocial covers a broad range of capabilities including Profiles, Relationships, Activity Streams, Shared Applications, Authentication, and Authorization.

The following future considerations describe further adoption of the OpenSocial specifications and APIs, beginning with the Gadget API and followed by broader OpenSocial support.

6.1 Gadget container and producer

Gadgets will allow users to get work done in Totara Social without switching to other applications. For example, a project team can respond to bugs and issues created and tracked in a issue tracking platform platform. OpenSocial Gadgets can be displayed in any OpenSocial-compliant container, even ones on the Internet.

Examples

Example implementations of Gadgets include Gmail, iGoogle, Jira dashboard, and the IBM Mashup Center. Gmail is a Gadget container (it's actually an entire OpenSocial container). Everything on the Jira dashboard is an OpenSocial Gadget. iGoogle dashboard for OpenSocial Gadgets. IBM Mashup Center supports interoperability with widget component models such as OpenSocial gadgets: (<http://www.ibm.com/developerworks/lotus/library/mashups-opensocial/index.html>).

Requirements

In the long-term, we propose to make TotaraSocial an OpenSocial Gadgets container and a Gadget producer with the following requirements:

- Ability to display Gadgets within any page within Totara Social.
- Ability for Administrators to register Gadgets.
- Ability for users to browse available Gadgets and insert them into the page via a UI.

- Ability for the system to display a summary of recent activity in Totara Social as a Gadget (“Activity Stream Gadget”).
- Ability to search Totara Social via Gadget (“QuickSearch Gadget”) while offering suggestions (auto-complete).

6.2 Broader OpenSocial support

OpenSocial provides a REST and RPC API through which OpenSocial compliant applications and containers interact with each other, transmitting user. The protocols support a variety of data exchange format including JSON, XML, and ATOM. OAuth allows users to authorize data stored in social networks. OpenSocial allows integrations based on simple web technologies (HTML, CSS, JS) which are the toolkit of all professional web developers.

7 Appendix: Industry research

Research for this document included the following:

1. The Forrester Wave™: Activities Streams, Q2 2012, including the following statement

“While firms often initially deploy enterprise social solutions as standalone systems, the vision for most includes enterprise social that is deeply integrated with adjacent collaboration, content, portal, and productivity applications. Increasingly, the strategy includes a social layer to “social-enable” enterprise business applications.

Forrester also states in the report that “enterprise social will become highly integrated with other enterprise solutions” and that “activities streams represent just one approach” to social enterprise (broader social capabilities like blogs and wikis are some of multiple approaches).”

2. The Forrester Wave: Enterprise Social Platforms, Q3 2011
3. Gartner: Magic Quadrant for Social Software in the Workplace, Q3 2011
4. “Yammer and why activity streams are a key foundation for integrated applications and organizations” by Ross Dawson, March 27, 2012
<https://bit.ly/GSbRo7>

Tibbr put activity streams squarely on the map, by integrating status messages from people with notifications generated by enterprise software including ERP, CRM, and HR systems. Employees are able to follow their colleagues and they can also follow updates on any activity, including events, projects, or even invoices. Tibbr was very well positioned to do that given Tibco’s history in providing enterprise integration middleware.

Since Tibbr’s launch Salesforce.com’s Chatter product has developed its activity stream capabilities, and in fact now allows process steps to be taken from within the Chatter stream. Newsgator’s Social Sites product specifically integrates activities from across applications into

streams, and Jive also has launched activity streams within its suite of products, among many moves from leading enterprise social software players.

Yammer is now playing in the activity stream space, putting itself forward as a horizontal layer that ties together a wide variety of enterprise software systems. The foundation for this integration is the Open Graph Protocol established by Facebook. Custom Yammer integrations into SAP and other enterprise applications have been built on top of open graph protocol. Integrations can be built to any contemporary enterprise application, though it is easier if they explicitly support open graph protocol.

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