.

Client Site A and Site B Personalization Enhancements

Functional Specification

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Client Site A and Site B: Personalization Enhancements – Functional Specification

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1. Document Purpose

This document describes the proposed functionality for several personalization enhancements to the Site A and Site B sites. This document describes the core features planned, and presents preliminary designs of many of the features.

The purpose of this document is to serve as a basis for working discussions between Client and Software Provider to determine what specific features and functionality are needed, and how they can best be incorporated into the sites.

1.1 Terminology

This section defines key terms used frequently within this document.

- **Passive Personalization** – Personalization that allows a site to track and display prior behavior with no account sign-in required

- **Active Personalization** – Personalization that relies on a user action to mark items of importance. A user must first create an account to access these features.

- **Published/Updated/Withdrawn** – Throughout this document, we refer to e-mail alerts getting triggered when content is published, updated, or withdrawn.

  - Published = status changed to "Published"

  - Updated = status changed to "Published-superseded"

  - Withdrawn = status changed to "Published-withdrawn"

2. Overview of Enhancements

Client and Software Provider propose methods to personalize the Site A and Site B Web sites to accommodate users' specific interests, and to alert users to new or updated content that might be of interest to them.

Software Provider has deployed personalization features across other sites (e.g., Agency's Site C) and has acquired information on which personalization features are most useful. From that knowledge base, and in conjunction with Client's user needs, Software Provider will develop specific personalization features for Site A and Site B as described in this document.

Software Provider will use two methods to provide users with a more personalized experience on the Site A and Site B Web sites – Passive and Active personalization.

Pending approval from Agency, there will be two options for user identification for personalization features: permanent cookies and site registration. These two methods, used in conjunction, will allow sufficient user identification for all of the personalization features, while requiring minimal personal information collection.

This project marks the development of a multiple feature enhancement for the Site A and Site B Web sites. The sites are currently implemented on Software Provider's Custom Content Publishing platform. These features will not involve any changes to the client's authoring tool user functionality.

Specifically, the following functionality is planned to be added to the Site A and Site B sites:

- **My Recently Viewed Guideline or Measure Summaries** – On the site home page, a user can see guideline or measure summaries he has recently viewed, and go to a guideline or measure summary with a single click. (No site registration required.)

- **My Recent Searches** – On the site home page, a user can see terms he has recently searched, and re-run that search with a single click. (No site registration required.)

- **My Favorite Content** – When viewing certain content, a user can mark it as a "favorite," similar to Favorites/Bookmarks in Web browsers. Users will have the option to receive e-mail alerts when that content is updated (superseded) or withdrawn. Favorite content includes guideline summaries, measure summaries, and organizations. (Site registration required.)

- **My E-mail Alerts** – Based on favorite content and other settings, users can receive digest-style weekly e-mail alerts when relevant content is published, updated (superseded), or withdrawn. (Site registration required.)

Related to these features, the following functionality will be added to the sites:

- **Site Registration** – Users will have the option to register on Site A or Site B in order to utilize the active personalization features. Registration will require an e-mail address and password.

  Note: Registration is required *only* for active personalization features; users can choose not to register, and will still be able to use the existing site functionality, as well as the new passive personalization features (recently viewed summaries and recent searches).

- **"Remember Me" Sign-In Feature** – If a user registers on the site and has cookies enabled, he will have the option at Sign-In to tell the site to "Remember me." When the user next visits the site using the same browser, no sign-in will be needed. Sign-in will persist until the user signs out or deletes his cookies.

- **Site Dashboards (My Site A and My Site B)** – There will be a new section on each site ("My Site A" and "My Site B") where users can define and manage their active personalization preferences. This section of each site is referred to generically as "the dashboard."

- **Changes to site home pages, headers, and left-side navigation** – Various changes will be made to these places on the site, as described and illustrated in this document.

- **Annual E-mail Verification Process** – In order to fulfill government regulations regarding the collection of individually identifiable information (IIF) (e-mail address and optionally name, in this case), Software Provider will create an annual cycle in which we e-mail all subscribers to verify that they want to maintain their e-mail alert subscriptions. This will be an opt-out feature; a user will stay subscribed unless he takes an action from the e-mail to unsubscribe (remove his e-mail alerts).

Note About Site Specificity:

This document discusses a set of features that will be added to the Site A and Site B Web sites. These sites are closely linked and share many functional similarities. However, the sites use different data sets.

Any personalization feature implemented on one of these sites will be completely site-specific. There will be no cross-over/data sharing between the two sites with regards to personalization features.

An example:

Organization X publishes guideline summaries (on Site A) and measure summaries (on Site B).

A user registers on Site A, and marks Organization X as a "Favorite" organization, and specifies that he wants to receive e-mail alerts about Organization X's content.

The user will receive e-mail alerts about Organization X's content on Site A only.

To be alerted about that organization's content on both sites, the user would need to register on both sites, mark the organization as a "Favorite" on both sites, and set up alerts on both sites.

3. Individual User Identification

Personalization requires a degree of individual identification. The primary options for individual identification on the Web are site registration (for active personalization features) and permanent tracking cookies.

Client will seek Agency clearance for approval to employ these identification options.

Important: All of the changes outlined in this document are dependent on getting approval to use one or both of these options.

Software Provider plans (pending approval) to use a permanent cookie *in conjunction with* site registration.

3.1 Site Registration and Sign-in

Site registration allows users to identify themselves without capturing any personal data other than an e-mail address. This type of registration allows a user to create an account with only an e-mail address and a user-created password, similar to the type of registration that exists on Agency's Site C. This method supports the active personalization features discussed in this document.

Note: When creating an account, users will be asked to provide a first name and last name. These fields will be optional. If provided, a first and/or last name will be used only to "greet" the user in the site header once signed-in (e.g., "Welcome, Robert Smith").

When signing in, a user will have the option to tell the system to "Remember Me," so he will not have to sign-in every time he returns to the site.

Note: This feature depends on the use of permanent cookies, which Software Provider plans to use, pending approval.

3.2 Tracking with Permanent Cookies

Passive personalization features do not require site registration, but do require tracking with permanent cookies. Permanent cookies allow the system to identify returning users based on the unique ID that the system assigns to the cookie. That ID can be matched to the passive personalization/tracking settings (recently viewed content and recent searches).

This method supports the passive personalization features discussed in this document.

A permanent cookie also allows the site to "remember" the user so sign-in is not required every time they return to the site.

4. Passive Personalization Features

Passive personalization allows the system to track and display prior behavior with no action required by the user (e.g., no account sign-in is required).

Software Provider will develop the following passive personalization features that will personalize the home page for each user, and will update his home page as he uses the site(s):

- My Recent Searches (available on both sites)

- My Recently Viewed Guideline Summaries (available on Site A only)

- My Recently Viewed Measure Summaries (available on Site B only)

Notes:

- Passive personalization places a permanent cookie on each browser, on each computer, so users must have cookies enabled in their browser settings.

- Passive personalization works on a per *computer* basis, not on a per *user* basis. So, for example, if a user visits the site on a computer in a library, the site will display the recent history of ALL users of that computer.

- If cookies are disabled/deleted, all data are lost.

- Users can opt out of passive personalization features by disabling cookies, which is a browser setting. Client will draft an explanation of this option, which Software Provider will add to the sites (e.g., FAQ or Help pages).

4.1 My Recent Searches (Site A and Site B)

This feature will work as long as cookies are enabled for the site in the browser.

When a user visits the home page, recently-run search queries (meaning, the terms for which he has searched) appear. They will be labeled "My Recent Searches," and will appear directly below the main search box:
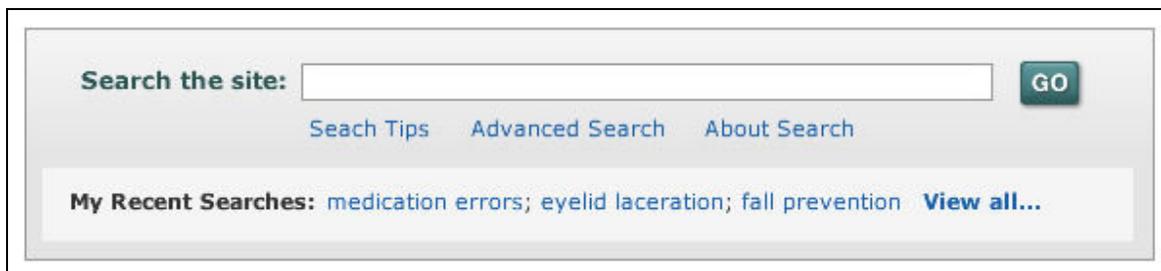
The first three recent searches will be displayed as links (full search terms, with no truncation); clicking a link will run the search and display up-to-date results for that term.

To see more recent searches, the user can click "View all…," which will bring up a pop-up window displaying up to 10 recent searches. Clicking a link will run the search and display up-to-date results for that term:

[DESIGN]

4.2 My Recently Viewed Guideline Summaries (Site A only)

This feature will work as long as cookies are enabled for the site in the browser.

When a user lands on the Site A home page, he will see a section called "My Recently Viewed Guideline Summaries."

Up to five guideline summaries can appear here.

The title of the guideline summary will be displayed as a link to that guideline summary's page on the site:

[DESIGN]

4.3 My Recently Viewed Measure Summaries (Site B only)

This feature will work as long as cookies are enabled for the site in the browser.

When a user lands on the Site B home page, he will see a section called "My Recently Viewed Measure Summaries."

Up to five measure summaries can appear here.

The title of the measure summary will be displayed as a link to that measure summary's page on the site:

[DESIGN]

5. Active Personalization Features

Active personalization relies on a user action to mark items of importance and/or request an e-mail alert. A user must create an account to access these features.

Software Provider will develop the following active personalization features:

- My Favorite Guideline/Measure Summaries

- My Favorite Organizations

- Customizable E-mail Alerts

Note: All of these active personalization features require user registration and sign-in.

[DESIGN]

5.1 My Favorite Guideline/Measure Summaries

Once a user has signed into the site, he can mark any guideline or measure summary as a "favorite."

There is no limit to the number of summaries users can mark as "favorite."

A "Save to Favorites" button will be added to each measure/guideline summary page (upper right corner, on the summary's toolbar):

[DESIGN]

After a user clicks "Save to Favorites," a pop-up window will display to confirm that the user has marked the summary as a "favorite." This pop-up window will include a link to the dashboard, and will also give users the option to sign up for e-mail alerts for this summary:

[DESIGN]

Users can manage their favorite summaries, and related e-mail alerts, on the dashboard:

[DESIGN]

Note: If a favorited summary is withdrawn, that summary will no longer appear in the list of favorites on the dashboard.

If a favorited summary that was withdrawn is later republished, it will reappear on the user's list of favorite summaries.

5.2 My Favorite Organizations

Once a user has signed into the site, he can mark any organization as a "favorite."

There is no limit to the number of organizations users can mark as "favorite."

Users can mark organizations as favorites on the main organization browse pages:

[DESIGN]

Each organization name will have a gold star next to it; hovering, the mouse over for this star will bring up mouse over text that says: "Favorite this organization."

When a user clicks a gold star to favorite an organization, a pop-up window will display to confirm that the user has marked the organization as a "favorite." This pop-up will include a link to the dashboard, and will also give users the option to sign up for e-mail alerts related to this organization's content. (This popup is the same one that comes up when a user favorites an individual organization from the organization page.)

After a user marks an organization as a "favorite" on this page, the star will change to a different color (green on Site A; purple on Site B) to indicate that it has been marked as a "favorite." The mouseover text for the star will also change to "Favorited" to indicate that the organization has been favorited.

There will also be a "Favorite This Organization" link added to each individual organization page (upper right corner):

[DESIGN]

When a user clicks this link, a pop-up window will display to confirm that the user has marked the organization as a "favorite." This pop-up will include a link to the dashboard, and will also give users the option to sign up for e-mail alerts related to this organization's content.

Users can manage their favorite organizations, and related e-mail alerts, on the dashboard:

[DESIGN]

5.3 Customizable E-mail Alerts

Users will be able to define e-mail alerts based on a number of personalized site features.

Users can sign up to receive alerts based on any or all of the following:

- My Favorite Measure Summaries (available on Site B only)

- My Favorite Guideline Summaries (available on Site A only)

- My Favorite Organizations (available on both sites)

- Topics (available on both sites)

- Domains (available on Site B only)

- New (Published) Expert Commentaries (available on both sites)

5.3.1 Different Ways to Sign Up for E-mail Alerts

Depending on the type of content, there will be different ways to sign up for e-mail alerts. More details on each are provided later in this document.

1. Sign up for My Favorite Measure Summaries/Guideline Summaries/Organization Alerts:

    When a user "favorites" a measure summary, guideline summary, or organization, the site will present a pop-up window confirming that the user has chosen the content as a "favorite." In this pop-up, the user will also be given the option to sign up for e-mail alerts about that measure summary/guideline summary/organization.

    Additionally, on the site dashboard, in a user's list of "favorite" guideline summaries, measure summaries, or organizations, they will have the option to add an alert for each content type by clicking the "Add to E-mail Alert" button.

2. Sign up for Topics and Domain Alerts:

    On the site dashboard, users can choose topics (both sites) or domains (Site B only) for which users want to receive e-mail alerts.

3. Sign up for Expert Commentary Alerts:

    On the Expert Commentary page, there will be a "Create Expert Commentary E-mail Alert" button, which will take the user to the dashboard.

    On the site dashboard, users can specify whether they want to receive e-mail alerts when a new Expert Commentary is published (this is an option on both Site A and Site B).

5.3.2 How E-mail Alerts Work

Regardless of which content a user signs up to receive alerts for, a weekly "digest" of personalized content will be sent.

For example, a user might sign up for alerts on these items:

*   "Evidence-based patient safety advisory: liposuction." (Site A Guideline Summary)

*   "Australian Council on Healthcare Standards (ACHS)" (Organization)

*   "Patient Safety" (Topic)

Once a week, the system will check for new/updated/withdrawn content related to each of the above items. If there is any new/updated/withdrawn content, the user will receive an e-mail message listing all the new/updated/withdrawn content for all three items that occurred in the past week. In most cases, the e-mail will contain titles of guideline summaries, syntheses, or measure summaries that will be a link to that content's page on the site.

At the beginning of each week (every Monday) an automated process will run, which will compile multiple alerts into one e-mail for each user. The e-mails will be sent to the user at the e-mail address he provided at registration.

Note: If there is no new/updated/withdrawn content related to the user's specified alerts, he will not receive an e-mail.

5.3.3 Content and Functionality of E-mail Alerts Message

The e-mail alert will appear to come from [TBD name/e-mail address]

The e-mail alert subject line will be: [TBD]

The e-mail alert will be divided into sections and subsections. Exactly which sections/subsections appear will depend on what the user has signed up for, and whether there are any relevant alerts.

The first section will be labeled "My Alerts," and will contain alerts on new/updated/withdrawn content based on topics and domains. New expert commentaries will also appear here, if applicable.

The following sections will contain alerts related to favorite summaries and organizations. These will be subdivided further by the specific summaries and organizations.

For example, if a user has signed up for alerts from two different organizations, there would there be a header for "My Favorite Organizations;" below that would be a sub-header for "Organization A" and a sub-header for "Organization B."

Within each organization's section, there would be further subsections for (as appropriate) "New," "Updated," and "Withdrawn."

Within each of these subsections would be the content alerts (most likely, titles of summaries or syntheses [Site A only]). Where applicable, these alerts would link to the content on the site.

Note: If a given piece of content (e.g., a guideline summary) falls under multiple "e-mail alert" categories, it will appear in all of those places in the e-mail. For example, if a new guideline summary is published and is linked to Organization X, and is also associated with the topic "Patient Safety," that guideline summary would appear twice in the e-mail, once in each section.

The e-mail will have a standard footer. This will include the e-mail address of the recipient. There will also be a "Go to [site name]" link in the footer, with a contextual sentence explaining that user can, on the site, unsubscribe, change his e-mail address, and add new alerts.

Clicking "Go to [site name]" will take the user to his dashboard page, where he will (if necessary) be prompted to sign in, and can then make changes to all of his e-mail alert settings.

Sample Site A e-mail alert (message body):

[DESIGN]

Sample Site B e-mail (message body):

[DESIGN]

E-mail Bouncebacks

If a user's e-mail address is no longer valid, the e-mail message will not be delivered, and will "bounce back." This will result in a "Your message could not be delivered" e-mail coming back to the sending e-mail address.

Client will need to decide if there is a need/desire to monitor these bouncebacks, and/or to periodically remove "dead" e-mail addresses for any reason. This will be discussed in more detail once we define the specifics of setting up the sending e-mail address.

5.3.4 My Favorite Guideline/Measure Summaries Alert

When a user chooses a "favorite" measure or guideline summary, the site will present a pop-up window confirming that the user has chosen that content as a "favorite." In this pop-up, the user will also be given the option to sign up for an e-mail alert about that measure or guideline summary:

[DESIGN]

Users can also sign up for "favorite" guideline/measure summary e-mail alerts on the dashboard:

[DESIGN]

The trigger for this alert will be if the "favorite" guideline or measure summary has been updated (superseded) or withdrawn.

Note: If a favorited summary that was withdrawn is later republished, it will appear again in the user's e-mail alert at the time that it is republished. It will appear in the "New" section of the alert, based on its status of published.

5.3.5 My Favorite Organization(s) Alert

When a user chooses a "favorite" organization, the site will present a pop-up window confirming that the user has chosen that content as a "favorite." In this pop-up, the user will also be given the option to sign up for an e-mail alert about that organization.

Users can also sign up for "favorite" organization e-mail alerts on the dashboard.

[DESIGN]

The triggers for this alert will be:

- A new summary(ies) has been published that is associated with the "favorite" organization.

- One or more of the "favorite" organization's summaries has been updated (superseded) or withdrawn.

5.3.6 Topic Alert

Client will supply to Software Provider two lists of topics that are mapped to the MeSH terms displayed in the Topic Browse on the Site A and Site B Web sites (one list of topics for Site A, one list for Site B). The topic lists will be used to sign up for e-mail alerts based on a specific topics. The list will only be accessible from the dashboard. The list of topics will not appear anywhere else on the Site A or Site B sites.

For example:

In the list is the topic "Diabetes," which corresponds to one or more MeSH terms. If a user signs up for an e-mail alert for this topic, they would receive an alert whenever content tagged with the corresponding MeSH term(s) was updated, withdrawn, or published. This content would include guideline summaries (on Site A), measure summaries (on Site B), guideline syntheses (on Site A), and expert commentaries (on Site A and Site B).

Users can sign up for topic alerts on the dashboard:

[DESIGN]

Topics that have previously been selected for alerts appear in a bullet list under "Topic Alerts." Clicking on any topic in this list takes the user to a search results page with results for that topic (based on the MeSH term mapping).

Clicking the "Edit my Topic Alerts" link brings up a pop-up window where users can edit existing alerts and identify other topic alerts they want to receive:

[DESIGN]

Additionally, when a user is on the first Measures by Topic window of the Site B site, or the first Guidelines by Topic window on Site A, there will be a button labeled "Create Topic E-mail Alerts:"

Clicking this button takes the user to the dashboard.

5.3.7 Domain Alert (Site B only)

Domains are used only by Site B, so this will be an option that only applies to the Site B site.

Users can choose to receive e-mail alerts related to a specific domain(s).

Users can define which domains are included in their e-mail alerts on the dashboard.

In the "My Alerts" section of the dashboard, there will be a box for "Domain Alerts." Any previously selected domain alerts will be listed, along with a link that says "Edit my Domain Alerts:"

[DESIGN]

Domains that have previously been selected for alerts appear in a bullet list under "Domain Alerts." Clicking on any domain in this list takes the user to a search results page with results for that domain.

Clicking the "Edit my Domain Alerts" link brings up a pop-up window where users can edit existing alerts and identify other domain alerts they want to receive:

[DESIGN]

Additionally, when a user is in the Domain Browse section of the Site B site, there will be a button labeled "Create Domain E-mail Alerts." Clicking this button will take you to the dashboard:

[DESIGN]

This button will also appear on the "Domain Framework and Inclusion Criteria" page in the About section of the Site B site:

[DESIGN]

The trigger for this alert will be when content associated with the domain is published, updated (superseded), or withdrawn.

For example, if a user signs up to receive alerts related to the domain "Clinical Quality Measures: Process," and a new Site B measure summary is published that is associated with the "Clinical Quality Measures: Process" domain, the user will be alerted (in his/her weekly e-mail alerts message) that the measure summary was added to that domain.

5.3.8 New Expert Commentary Alert

Expert commentaries appear on both Site B and Site A, so this will be an option on both sites.

Users can receive an alert when a new expert commentary is published to the site.

The trigger for this alert will be when any new commentary is published; thus appearing on the Expert Commentaries landing page.

There will be two ways to add Expert Commentaries to e-mail alerts.

1. In the Expert Commentaries section of the site, there will be a button on the page that says "Create Expert Commentary E-mail Alert:"

    [DESIGN]

    Clicking this button does one of two things:

    - If a user is not signed-in: Prompts him to sign-in or create an account.

    - If a user is signed-in: Displays a pop-up window confirming that the user has added an e-mail alert regarding the publication of new commentaries. The alert will include a link to manage all e-mail alerts:

        [DESIGN]

2. Users can also sign up for expert commentary e-mail alerts on the dashboard.

    In the "My Alerts" section of the dashboard, there will be a box for "Expert Commentary Alert":

    [DESIGN]

If a user clicks the "Add to E-mail Alert" button, he will be signed up to receive alerts whenever a new expert commentary is published.

6. Site Registration and Sign-In

Site registration is required to use the active personalization features of the site. Registration requires users to provide an e-mail address and a password. Once an account is created, users can sign-in to the site, choose "favorite" content, and set up e-mail alerts. Users will also have access to the dashboard for the site ("My Site A" or "My Site B"), to manage personalization settings.

6.1 Creating an Account

Users must create an account to sign-in to the site and access the active personalization features.

Users can create an account directly from the home page. If a user lands on the home page and has never created an account, there will be a box on the home page that allows the user to either sign-in or create an account.

Also, there will be places where users will be prompted to either sign-in or create an account. This will happen if they try to access a feature that requires registration (such as choosing to "favorite" a piece of content).

To create an account, all users are required to provide is a valid e-mail address, and a password. Optionally, users can also provide their first and/or last name for a personalized greeting upon sign-in.

Creating an account involves entering an e-mail address (required), password (required), password confirmation (required), first name (optional), and last name (optional), then clicking the "Create Account" button.

Note: If a user provides their first and/or last name when they create an account, the system will display that name in the site header when they are logged in (e.g., "Welcome, Robert Smith" or "Welcome, Jane"). It may also display their name in e-mail alerts.

If no first/last name is provided, the system will identify users e-mail address (e.g., "Welcome, jennd@Software Provider.com").

6.2 Signing-In to the Site

By default, when a user arrives on the Site A or Site B Web sites, they will not be signed-in (unless they had signed-in previously and told the site to "remember me"). The cookie will not have an expiration date.

A user does not need to sign-in to the site to use any of the previous site functionality (meaning, functionality that existed prior to the personalization enhancements being completed).

If a user chooses to sign-in, they can access the active personalization features (the ability to "favorite" content, set up e-mail alerts; and, if cookies are enabled, the ability to have the site remember their sign-in

information).

On the home page, if a user is not signed-in, they will be presented with the option to sign-in to the site, or to create an account.

There will also be a "Sign In" option in the persistent site header. This option will be a text link that, when clicked, will bring up the Sign-In pop-up box. When the user is signed-in to the site, this link will change to say "Sign Out."

Additionally, there are certain places where the user will be *prompted* to sign-in if they have chosen an action that requires it (example below).

Summary of sign-in options:

- From the Home page: Sign In box in right-hand sidebar appears if the user is not signed-in. Once signed-in, this is replaced by personalized content.

- From the Site header (persistent): Option to sign-in (or sign out) from any page on the site. Text link.

Summary of sign-in prompts:

- Navigation button link for "My Site A" or "My Site B" – If the user is not signed-in, and clicks the "My Site A" or "My Site B" linked button in the left-side navigation menu to go to the site dashboard, they will be prompted to sign-in or create an account.

- "Favorite" text link/icon – If the user is not signed-in, and they click a link/icon to favorite something (a measure summary, guideline summary, or organization), they will be prompted to sign-in or create an account.

- "E-mail Alerts" link/button – If the user is not signed-in, and they click a link/button to receive e-mail alerts, they will be prompted to sign-in or create an account.

Depending on the context, the sign-in prompt will appear either as a site page or as a pop-up window.

Example:

A user is not signed-in, and they are viewing a guideline summary on Site A.

A user clicks the "Save to Favorites" link in the upper right corner of the window.

The Sign-In/Create Account pop-up window appears:

[DESIGN]

6.3 Sign-In Process

To sign-in, a user must enter their e-mail address and password and click the "Sign In" button:

If either field is left blank, or if the e-mail/password combination is invalid, the following message appears: "The e-mail address and/or password you entered does not match any current [site name] account."

Successful sign-in for a registered user will take them to the page they were on, or the page they were trying to get to. The user will also notice that in the site header, the "Sign In" link will change to say "Sign Out," and their name (if provided) or e-mail address will appear next to the Sign Out link (e.g., "Welcome, Robert Smith") along with a link to the dashboard.

6.4 "Remember Me" Sign-In Feature

If a user has registered on the site and has cookies enabled, they will have the option, at sign-in, to tell the site to "Remember Me." If this option is selected, the next time that user visits the site using the same browser, they will not need to sign-in again. Their sign-in will persist until they either sign out or delete their cookies.

Note: Multiple sessions for the same user cannot be active at the same time. To prevent multiple active sessions, the system will first check if the user is allowed to be signed in automatically before performing the sign-in.

If a user is signed-in to their account, and then another user signs in using the same username and password, the first user will be signed out and taken to the sign-in screen. If the first user then attempts to access the site, the cookie will sign them in automatically, and the second user will be signed out.

6.5 Password Reminder

If a user has previously registered for the site but has forgotten his password, he can reset his password by using the "Forgot your password?" link on the Sign-in box.

When the user clicks this link, he will be prompted to specify the e-mail address he registered with. (If he enters an e-mail address that is not in the system, he will get a message telling him that, and will have the chance to re-enter his e-mail address.)

The system will then send the user an e-mail including a temporary password and a link to sign in and reset his password.

When the user follows the link in the e-mail, he will be prompted to sign in using the temporary password from the e-mail message.

Once he has signed in with the temporary password, the user will be prompted to reset his password (i.e., specify a new password) and confirm it.

Once the user confirms his new password, he will be signed in using that password, and will be on the homepage. The new password has now replaced the old password.

6.6 Edit Account Information Option on Dashboard

If a user needs to edit their account information (name, e-mail address, or password), this can be done from the dashboard. There will be a link titled "Edit my account information:"

[DESIGN]

Clicking "Edit my account information" will bring up this window:

[DESIGN]

7. **My Site A/My Site B Pages (Dashboards)**

Software Provider will develop a new dashboard page for the Site A and Site B Web sites where users can define and manage their active personalization settings.

This page will be accessible directly from the home page, and also from any page in the site via the main site navigation (left-hand navigation menu).

On Site A, this page (and the link to it) will be titled "My Site A." On Site B, the page will be titled "My Site B."

When a user first arrives on the site, by default they are not signed-in. If a user clicks the link to go to the "My Site A" or "My Site B" page (aka dashboard), they will be prompted to sign-in, or create a new account:

[DESIGN]

Once a user has signed-in to the site, they will be on their "My Site A" or "My Site B" page, also known generically as the dashboard. Here users can manage all of their active personalization features.

If a user has not yet defined any personalization options on the site, the dashboard will display text explaining the various personalization options:

[DESIGN]

If a user has defined personalization options, those will be displayed (grouped by headers), and he can edit these options.

Here is an example of the site dashboard in Site A, with active personalization content defined:

[DESIGN]

Here is an example of the site dashboard in Site B, with active personalization content defined:

[DESIGN]

8. Site Home Page Changes

The home pages for both sites will be redesigned to accommodate two new kinds of content:

- Passive personalization content – recent searches and recently viewed summaries
- Active personalization content – favorites and e-mail alerts

Personalization content on the home page will update once per user session.

Here are illustrations of the Site A home page highlighting these new areas. Notice that the area at the top of the right-hand sidebar changes depending on whether you are signed in and whether you have set up personalized content.

This is the Site A home page when a user who is *not signed in* arrives on the site:

[DESIGN]

This is the Site A home page after a registered user who has *no personalized content* has signed in:

[DESIGN]

This is the Site A home page after a registered user who *has personalized content* has signed in:

[DESIGN]

8.1 Passive Personalization Content on the Homepage

8.1.1 Recent Searches

When a user lands on the site home page, he will see his recently-run search queries (meaning, the terms for which he searched). These will be labeled "My Recent Searches," and will appear within the main search box.

The first three recent searches will be displayed as links; clicking a link will run the search and display up-to-date results for that term.

To see more recent searches, the user can click "View all…," which will bring up a pop-up window displaying up to 10 recent searches.

8.1.2 Recently Viewed Summaries

There will be a new area in the right-hand sidebar. This new area, "My Recently Viewed Guideline Summaries" or "My Recently Viewed Measure Summaries" will display up to five recently-viewed guideline or measure summaries. Each title will be a link; clicking it will take users to the page for that guideline or measure summary.

8.2 Active Personalization Content on the Homepage

There will be a new area added to the top of the right-hand sidebar on the homepage.

This section of the page will display one of the following:

- *If a user is not signed-in:* A sign-in box where the user can either sign-in, or click a link to create a new account:

  [DESIGN]

- *If a user is signed-in but has not yet created any personalized content*: He is prompted to visit his dashboard to set up personalized content:

[DESIGN]

Clicking either of those links will take the user to his dashboard.

- *If a user is signed-in and has personalized content:* Information about his personalized content, with a link to the dashboard.

  For example, if a registered user has previously created personalized content (favorites and/or e-mail alerts), he might see the following:

  [DESIGN]

9. **Site Navigation Changes**

To make it easy for users to access active personalization features from anywhere on the site, Software Provider will add items to the left-side navigation menu, and to the site header. These elements are persistent (that is, they appear on all main site pages).

9.1 Left-Side Navigation

The left-side navigation on each site will have a new option to allow the user to access the dashboard for active personalization features. Since access to the dashboard is being added to the persistent navigation menu, the option will be available from any page on the site that uses that navigation menu.

- On Site A, the menu button will be labeled "My Site A," and clicking it will take the user to the My Site A page (dashboard).

- On Site B, the menu button will be labeled "My Site B," and clicking it will take the user to the My Site B page (dashboard).

[DESIGN]

If a user clicks this navigation button when they are not yet signed-in to the site, they will be prompted to either sign-in or create a new account. (Users cannot access the dashboard without being signed-in.)

[DESIGN]

9.2 Site Header

Software Provider will add new text and links to the far right side of the site header (for Site A and Site B).

If a user is not signed-in, they will see a "Sign In" link in the site header:

[DESIGN]

Clicking "Sign In" will bring up a pop-up window where users can sign-in or create an account.

If a user is signed-in, they will see the following in the site header:

[DESIGN]

- Personal welcome message (e.g. "Welcome, Robert Smith")

- Link to "My Site A" (or "My Site B") – clicking this will take the user to the dashboard

- Link to "Sign Out" - Clicking this link will refresh the page, which will return to its pre-signed-in state

10. Schedule (Project Dates and Milestones)

Owner	Milestone	Date
Software Provider	Functionality Proposal First Draft, including design mockups, delivered to Client	January 20, 2012
Client	Feedback on Functionality Proposal (First Draft) delivered to Software Provider	February 6, 2012
Software Provider/Client	Calls to clarify the proposal have been conducted. (First Draft)	February 9, 2012
Software Provider	Second draft of Functionality Proposal delivered to Client	March 2, 2012
Client	Feedback on Functionality Proposal (Second Draft) delivered to Software Provider	March 7, 2012
Software Provider/Client	Calls to clarify the proposal have been conducted. (Second Draft)	March 9, 2012
Software Provider	Third (final) draft of proposal delivered to Client	March 26, 2012
Client	Final Functionality Proposal signoff from Client delivered to Software Provider.	TBD
Client	Final Functionality Proposal provided to Agency as the proposed strategy for the personalization enhancement.	TBD
Client	Have submitted an application for Agency clearance for approval to employ the tracking technologies as described in this document.	TBD
Client	Have obtained final approval from Agency for approval to employ the tracking technologies as described in this document.	TBD
Client	Topic list has been finalized and delivered to Software Provider, including specifics of mapping topics to MeSH terms	TBD
Client	Have assembled and submitted to Agency change requests for the personalization enhancement features.	TBD
Client	Have obtained final approval from Agency prior to releasing any of the proposed features to the production environment for the Site A and Site B Web sites.	TBD
Software Provider	Enhancements posted to staging sites	TBD
Software Provider	Enhancements posted to live sites	TBD; prior to July 31, 2012

11. **Optional Phase II Enhancement**

This section discusses one feature that Software Provider proposes *not* including in the initial project, but keeping for consideration to be added in "Phase II." This would sometime after the current fiscal calendar year.

11.1 Saved Searches

Once you have signed into the site (either Site A or Site B), you can search for a term ("search query") and then save that search query for future use.

For example, you could sign in to the Site A site and search for "patient safety," and get a page of results.

On the search results page, you would have the option to "Save this Search."

If you did this, the system would confirm that you've saved it, and "patient safety" would be added to your list of "Saved Searches."

You would be able to manage your Saved Searches on the dashboard.