

Personalizing Coeus: Personalization Engine

The slide features several decorative circles of varying shades of light purple. One circle is white with a light purple outline, containing the text 'Coeus User Group Meeting'. Two other circles are solid light purple. The text 'March 31, 2008' is positioned to the right of the white circle. Below the main text, there are two more solid light purple circles, and the names 'Mojgan Amini' and 'Robert Dias' are placed to the right of the bottom-right circle. The text 'University of California, San Diego' is centered at the bottom.

Coeus User Group Meeting
March 31, 2008

Mojgan Amini
Robert Dias

University of California, San Diego



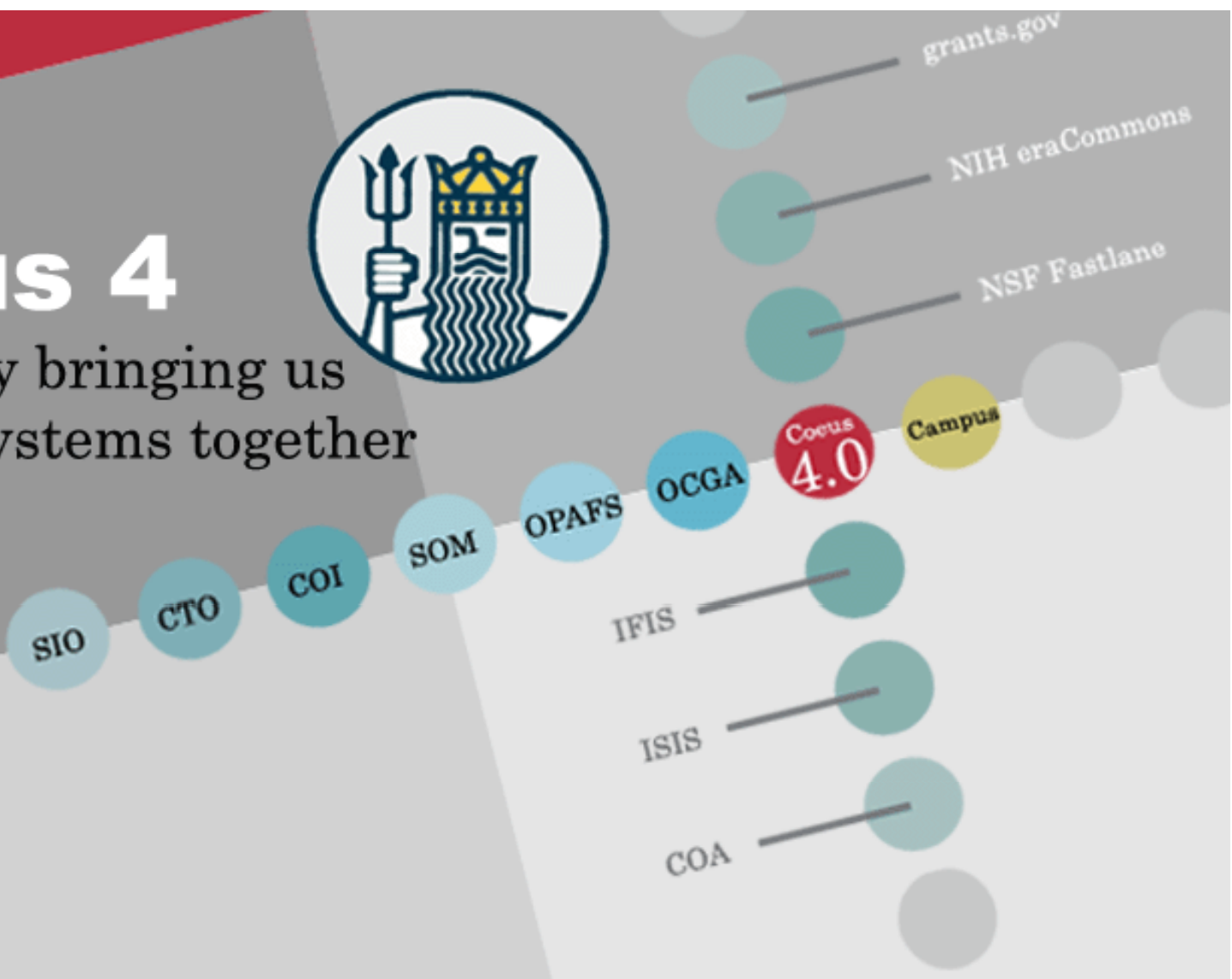
Topics

- Introductions
- Coeus at UCSD
- What is the Personalization Engine?
- Demo of Personalization Engine
- Conclusion
- Q&A



Coeus 4

technology bringing us
and our systems together





Why was the PE Developed?

To meet Coeus4 implementation goals:

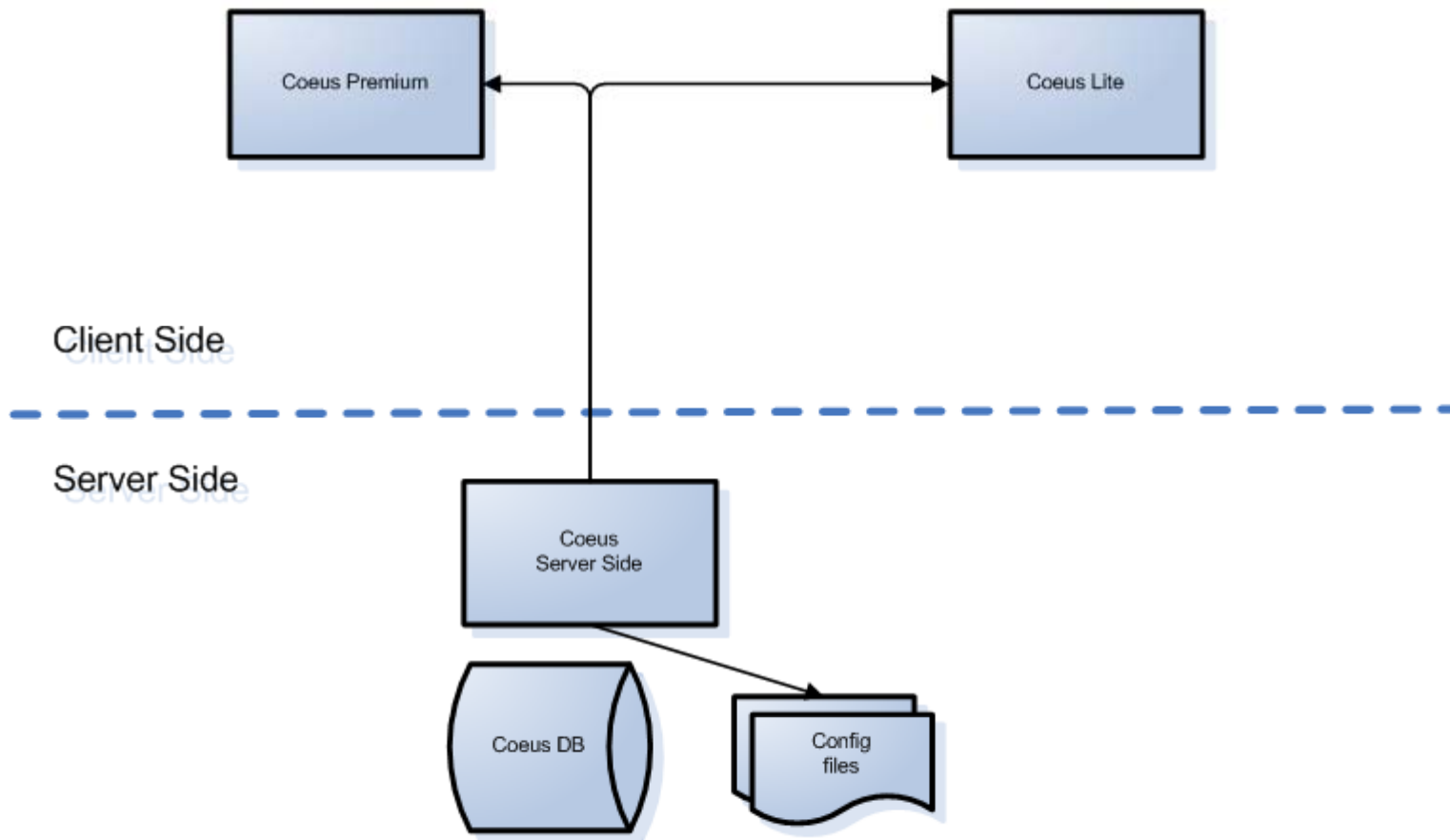
- Highly Customized
 - Tab and label names and placement
 - Validation and required fields
 - Summary Reports and links to information
 - Interface to external systems
- Access Rights and Logging
 - Departments as Functional Owners
 - Audit Logging
- Take Coeus4 upgrades

What is the PE?

- An add-on to Coeus
- Will be part of Coeus 4.3
- Allows customization to Coeus UI without Coeus code changes
- Rules and attributes are defined in properties files (XML)

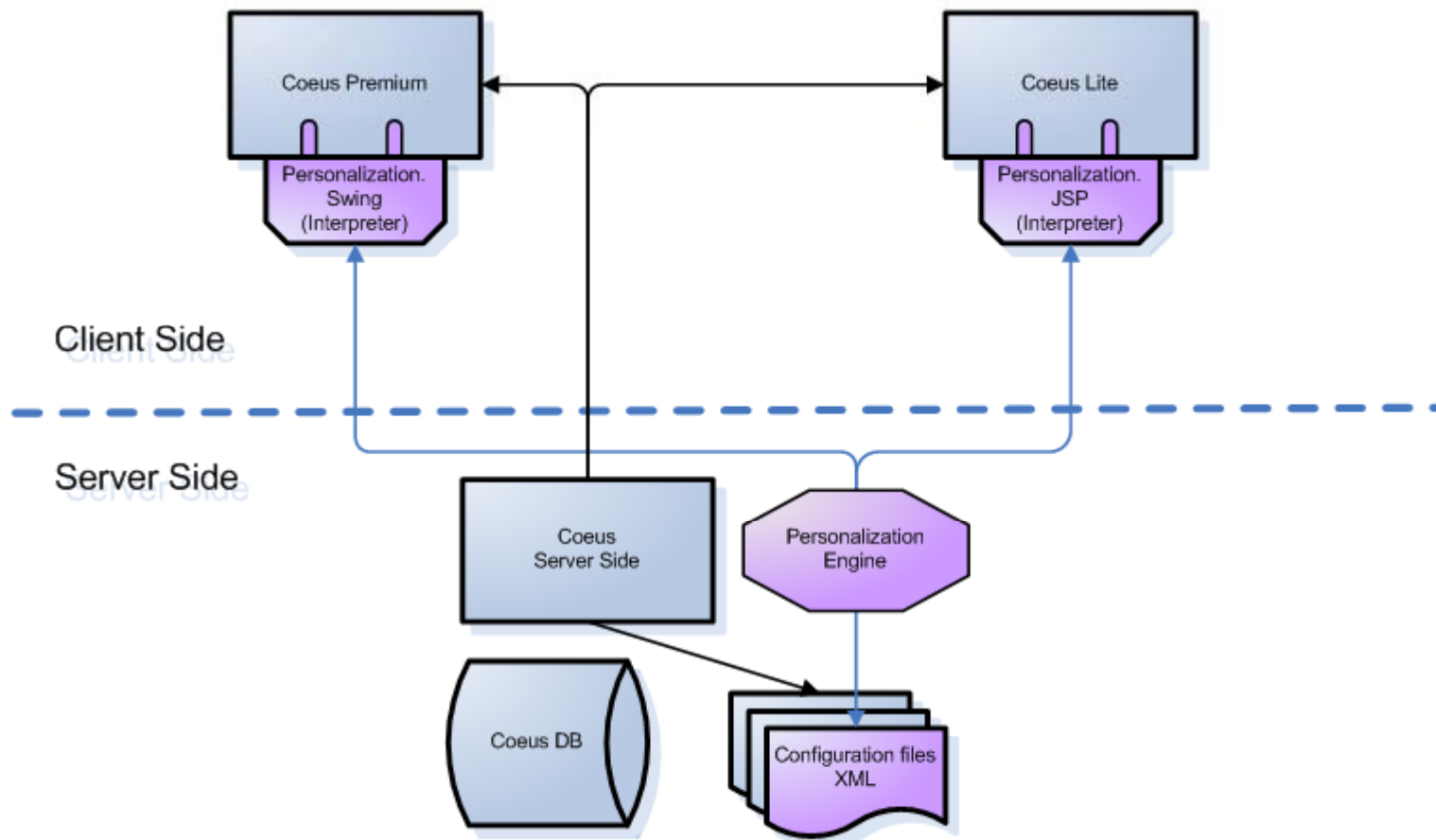
PE Overview

Personalization Engine Overview



PE Overview

Personalization Engine Overview



How is the PE used?



1. Create 'coeus_forms.xml' file based on schema
2. Make customizations and changes, i.e. label name changes
3. Save file and refresh Coeus screen to see changes

Sample Configuration File

```
<coeus-forms xmlns="http://coeus.ucsd.edu/personalization/coeusforms">
  <!-- Award Detail Form -->
  <cform classname="edu.mit.coeus.award.gui.AwardDetailForm">
    <!-- Change default label name from Account to Fund/Index -->
    <!-- Change label color to red to indicate required field -->
    <cfield>
      <varname>lblAccount</varname>
      <name>Fund/Index:</name>
      <type>javax.swing.JLabel</type>
      <attr>
        <fgcolor>#FF0000</fgcolor>
      </attr>
    </cfield>
  </cform>
</coeus-forms>
```

Schemas



Personalization.xml



coeus_forms.xml
(Modify static component attributes)

[Schema diagram](#)

Currently:
Authentication.xml – user level access
Coeus roles – application level access
coeus_security.xml - form/field level access



Demo – Label Change

- Change names of any label as defined by your institution.
- Currently only text, radio and checkbox labels can be changed.

Demo – Disable Field



- Ability to disable any fields that are not used by your institution
- Avoid Unnecessary use of unknown fields
- Enable when ready to use

Demo – Attribute change

The title is centered and surrounded by five circles of varying colors and styles: a solid light purple circle on the left, a white circle with a light purple outline, a solid light purple circle, a white circle with a light purple outline, and a solid light purple circle on the right.

- Change color, font types and size
- Show required fields as RED

Demo – Hover Over Label and Launch URL



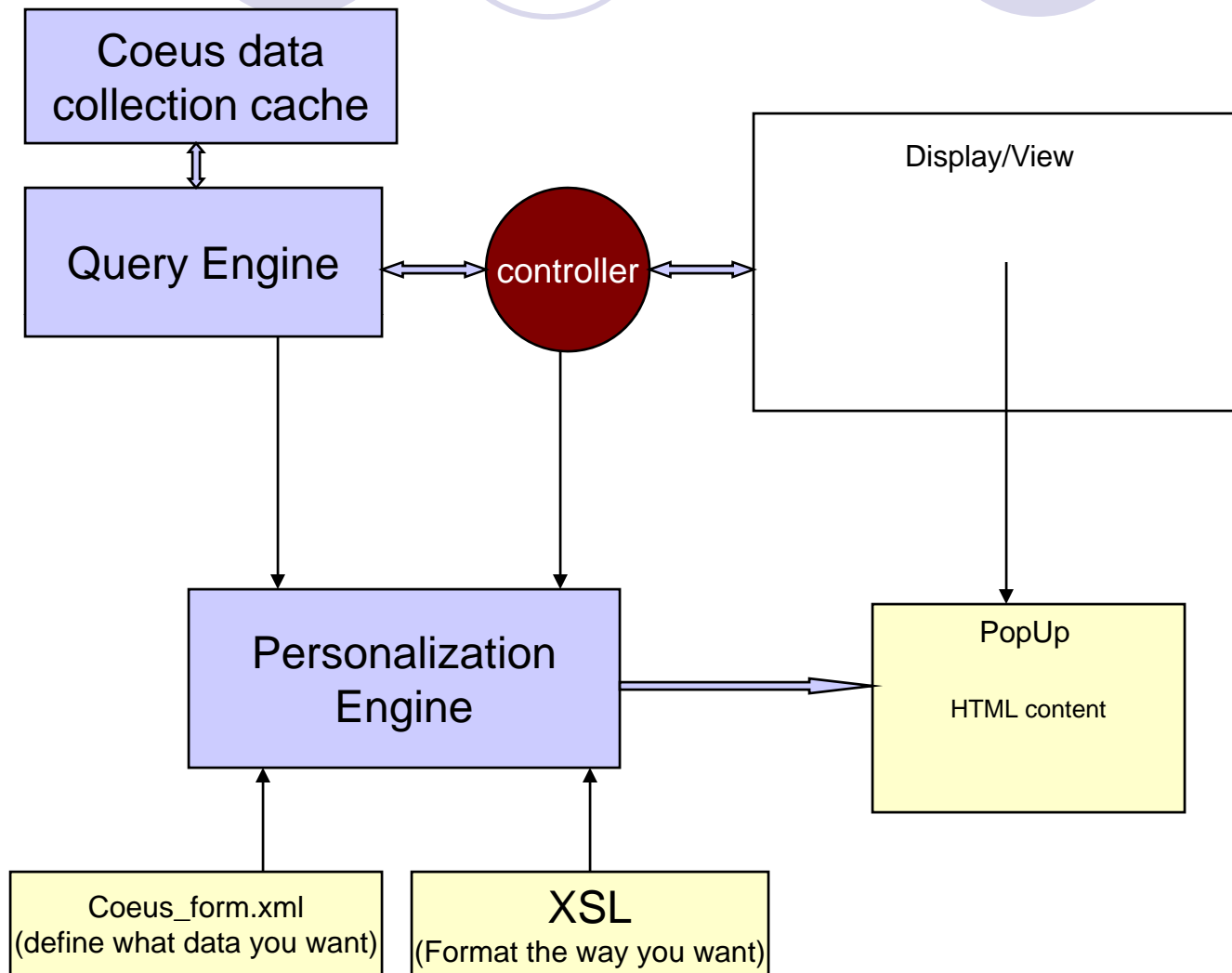
- Add tooltips to any label, buttons etc.
- Show HTML content in a pop-up
- Launch a static URL.
- Able to create dynamic URL based on form parameters.

Demo – Add Buttons



- Add toolbar buttons to any module.
- Launch a static and dynamic URL.
- Can also be used to launch a context sensitive report (Next demo).

Context Sensitive Report Overview



Demo – Context Sensitive Report

- Uses MIT's query engine to collect data.
- Create your own panel using XSL.
- Launch via configured toolbar button.
- Visible in all tabs
- Can easily be extended to Coeus lite.
- Ex: Show one click award summary panel

Component Catalog



- Use Catalog to identify component name for configuration.
- [Link to Catalog](#)

Coeus-Lite

A decorative graphic consisting of a horizontal row of five circles. The first circle is solid light purple and contains the text 'Coeus-Lite'. The second circle is hollow with a light purple outline. The third circle is solid light purple. The fourth circle is hollow with a light purple outline. The fifth circle is solid light purple.

- Personalization framework will be implemented in Coeus lite
- Same configuration file can be used



Conclusion

- Base PE included in Coeus 4.3
 - Label, font, color changes on all components
 - Hover-over and URL links
 - Context-sensitive summary panels/reports
 - Pre-populating default values
 - Short-cut keys
- Extensions to PE in future Coeus releases
 - Validation of input
 - Security Rules (based on data, user, status)

Questions?

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