Drupal Ecological Information System 2010 Training Report

P.I. Inigo San Gil, Marshall White

Cross-site Projects, Synthesis and Training Working Groups 2011 Proposal

Organization Role: Lead Organizers

Summary

There are two particular metrics that constitute good indicators for the outcomes of a training session. One indicator is a post-training survey, and other appropriate indicator is identify products associated that are derived from the training. This report includes both metric indicators. A full hands-on three day training was conducted in the LTER Network Office Training Laboratory. Participants were energized and motivated by the session, as reflected in the post-mortem survey, and many products deployed as functionality in the participant's site web portal were started and even completed during the training. Participants clamored to give continuity to this activity.

Attendants

Name	Site	Affiliation
Eda Melendez	LUQ	Luquillo Experimental Forest LTER
Hap Garritt	PIE	Plum Island Ecosystem LTER
Kristin Vanderbilt	SEV	Sevilleta Wildlife Refuge LTER
Anya Shipunova	MBL	Marine Biology Laboratory
Kyle Kwaiser	UMBS	University of Michigan Biological Station
Leanne Yanabu	LNO	LTER Network Office
Marshall White	LNO	LTER Network Office
Inigo San Gil	LNO/NBII	LTER Network Office

Report Outcomes: Post-training survey

All attendants filled an online survey http://intranet.lternet.edu/im/node/736 about the workshop. Here are the synthesized results, with detailed comments at the end.

For the following questions, the participants were asked to pick a number from 1 (Poor/Not so much) to 6 (Excellent/Definitely) as their answer.

The overall median for the answers falls in the top score (Excellent/Definetely).

I was able to ask questions.
Mean 6.   (100% answer maximum score (definitely))

My questions were answered
Mean 5.83.   One 5, the rest gave it the maximum score.

I have the tools I need to complete and launch my website
Mean   5.16 (2/6, 3/5, ¼)

The workshop met my expectations
100% maximum score

The workshop surpassed my expectations
One 5, the rest gave it the maximum score.

The workshop conductors had a solid plan
One 5, the rest gave it the maximum score

The workshop conductors did a good job
100% maximum score

I was able to contribute
4 One 5, the rest gave it the maximum score

I took home all I wanted to
65% maximum score, 35% a 5/6

I understand better "Drupal Views"
65% maximum score, 35% a 5/6

I understand now basics concepts in Drupal
One attendant gave it a 3/6, the rest maximum score.

I understand better content types
One answered with a 5/6, the rest gave it the maximum score

I understand better theming and CSS in Drupal
65% max score, the rest equally 5/6 and 3/6

I understand better Panels
65% max score, the rest equally 5/6 and 4/6

I understand better taxonomies (terms, keywords, vocabularies..)
40% max score, 20% 5/6 and 40% 4/6

I would like to assist another workshop like this within the next year
100% maximum score

I liked the format of the workshop (small, paired expertise with specific goals, need-driven)
100% maximum score

Report Outcomes: Post-training products

There are a number of products that came out as a result of this training exercise. Due to the nature of the training, the number of outcomes is elevated.

In all cases, these products are part of a comprehensive information management system handled by the participant. We break down a few details of the contributors. As a side note, all participants from LTER dedicated the year NSF IM supplement awards for Drupal related work.

URL	Participant	Component Description
http://gorilla.ites.upr.edu	Eda Melendez	• Frontpage layout (Panels) • Rebuild website and database
http://pie-dev.mbl.edu	Hap Garritt	• Sites (plots) import • Google maps to see sites • Launch DEV site • Views • Import content, csv files and EndNote bibliography
http://tierra.unm.edu	Kristin Vanderbilt	• Panels • Frontpage layout • Selectable links for "Other LTER sites" • Use of views
http://news.lternet.edu http://databits.lternet.edu	Leanne Yanabu	• Understand better Drupal workflows • Modify themes
http://umbs.lsa.umich.edu	Kyle Kwaiser	• Use devel module to assist developing • Cron • Ssh config • customize (theme) the user's home page via user-registration.tpl.php • Use of Markup Module to insert custom text into node • Background on virtual servers, apache configuration

Lessons learned purpose and objectives

A reduced group that began as a grassroots efforts had in 2010 the first official training. The format offered deviated from the traditional magisterial lectures to a hands-on, attendant driven approach. This particular mode pleased everybody, and all expectations were surpassed (see survey comments attached). The success of the training was traced to the size and type of training. A balanced mix of experts and Drupal novices allowed us to pair-up the participants. Efficiency on knowledge transfer can also be attributed to the high motivation levels of the attendants. The knowledge acquired can be immediately applied into their day to day work. This is not a curiosity, or trendy training, DEIMS are the tools to manage the backbone that the group of Information Manager chose.

Improvements from post-mortem analysis

• Need more breaks, the intensity of the activities proved too much to some, who felt exhausted at some point and unable to perform == We will offer more breaks next time

• Not one single body of knowledge – since different persons learnt different things, it is hard to compile the exercises into one volume. It is hard to address such issue, but we can start by video-taping the common sessions and also produce some documentation for ad-hoc techniques tried with success.

- We were surprised by the activity level of the group, as well as the excitement.
- The ad-hoc approach left some gaps in the body of knowledge. Advanced topics were covered at the expense of critical basic topics which deserve more attention. We plan to revisit these topics next time around.
- Scalability of the training model is a big question. We know that corporations such as google have conducted similar flex-format "un-meetings" with success, but we are unsure how well this is going to play out in our particular setting. We plan to repeat this effort next year and test out the scalability hypothesis (hypothesis is: yes, it can be done with more participants)

DEIMS 2010 Training

Highlights

Top 3 Significant Training Successes

Training Success	Factors That Supported Success
Hands on, interactive	Stayed away from magisterial format (minimize powerpoints, etc)
Product oriented	Put the needed products as the centerpiece of the learning topics, instead of disconnected examples
Attendant Satisfaction	Format, Group size, motivation

Other Notable Training Successes

Training Success	Factors That Supported Success
Social	Keep the group rallied and engaged after hours
Participation level	Attendants chances to ask questions
Attract NSF funds	Group work, common goals.

Taining Shortcomings and Solutions

Training Shortcoming	Recommended Solutions
Knowledge Gaps	Provide structured lectures to address essentials
Uneven take home load	Clarify expectations per attendant pre-training
Intensity	Tone it down, provide more relaxing moments
Scalability of training model	Unsure where this model breaks. 15 participants?

Appendix: Survey Comments

Tell us what you thought about the workshop -- don't hold back!
All attendants took the time to answer, with an average submission length in words (ex blanks) 191.67

Here are the actual comments.

1) This was by far the best IM workshop I have ever attended. The group was small, the participants had very clear work-driven objectives, and there were enough people with the appropriate expertise in the mix that I was getting answers to my specific questions about 75% of the time. I am much better prepared to complete the task of launching my website than I was before the workshop. I finally understand how Views function, and I'm reasonably confident that I can recreate what we did with Panels. These were two major stumbling points for me. That said, I expect I may still have a few questions for the LNO

Drupal experts down the road, but I've definitely been empowered by the workshop to feel confident that I will someday launch a content-rich Drupal website that will also serve as our metadata management system. It's pretty cool to have had the opportunity to work closely with the other IMs trying to do the same thing, and to have strengthened our commitment and ability to help each other realize our Drupal goals.

2) First of all, I was already fairly experienced in many aspect of Drupal (e.g., basic concepts, panels, taxonomies, views) which is why I gave 2's, 3's. Overall, the workshop progressed well from introductory materials to more advanced topics throughout the week. Workshop attendees constituted a large range of talents and the presence of several attendees (4-5) with specialized skillsets ensured everyone had an opportunity to learn. The "needs-driven" approach worked well because I came in with a small set of specific questions (e.g. setting up cron, theming forms) and I would have been bored by a large number of introductory Drupal-sessions. However, I do think sprinkling a few more, formal sessions would have been beneficial. The workshop organizers (Inigo and/or Marsh) could have come down with a Corinna-esque hammer a few times to keep things on track. I left with the following: - Background on virtual servers, apache configuration (virtual hosts), ssh configuration (security), db backups - Debugging (Devel module) and the construction of small php snippets (within the Rules module) to improve the end-user experience - Better understanding of the Drupal2EML module - Confirmation that my Drupal site should use the same content type schema as other sites - How to set up cron - How to customize (theme) the user's home page via user-registration.tpl.php - Use of Markup Module to insert custom text into node add forms Intangibles: Meals and social time were a plus as I generally don't get a chance to informally discuss new avenues/options for IM through Drupal. Hotel, Albuquerque and LNO staff were pluses as well. Finally, I would like thank to the LTER IM Committee for funding this workshop. As a non-LTER IM, I really appreciate the support of my attendance as well as my inclusion in other LTER IM activities which have been infinitely beneficial. If you ever need these sentiments packaged into a formal record just let me know.

3) I definitely learned a lot more about Drupal during this workshop than before I arrived. I feel comfortable in installing a Drupal instance along with the enabling of various modules. I learned more about cron and updating the database I learned how to import content, csv files and EndNote bibliography (after many tries and failures, but we learn best after making mistakes!) I became more familiar with taxonomy and set up some example vocabularies with terms for allowing searches. I created a Google map in Research Site and was able to import a csv file of various categorized research sampling site locations with latitude and longitude so that locations could be displayed in a map by categories of research sites. I followed along fairly well when the Views and Panels examples were demonstrated but could not participate fully since I had no content on my Drupal site to experiment with. I plan to try shortly while it is still fresh in my mind (I finally have a a variety of content imported so I can try implementing various views. Inigo, Marshall and the rest of the LNO staff that helped with the workshop were extremely helpful. The hands on learning/doing was extremely beneficial as was the small number of participants. For hands on learning and doing it is critical that the group be small. The workshop agenda was flexible enough to allow the participants to proceed at varying speeds dependent upon the expertise of the participants. Suggestion for a future Drupal training session. Create as many Drupal instances as there are participants and populate the instances with some example LTER content that could then be used during the demonstration part of the workings of various modules. All participants would then be using the same module set up and content and could follow the examples more clearly which would help to more clearly demonstrate a generic concept of how to create a view or use panels etc. Participants at this workshop used their own content and often questions were specific to their own Drupal instance/content which was extremely helpful to that participant but not as leveragable for other participants. Much of this is to be

expected when there are different levels of participant expertise so the above is not a criticism just a training suggestion. Thanks, lets do it again!

4) Really we accomplished much more than I expected. I learned much more than I expected. Some of the topics did go over my head or were not relevant to the areas of my focus but I think other participants got a lot out of those discussions and hands-on activities. Personally I would have been more efficient if we had had more breaks. We should have taken the lunch hour on the last day to go for a long walk and talk -- to reflect and sort through the previous days' experiences. I think that would really have solidified the experience. The social and networking aspects of these face-to-face events cannot be underestimated. Despite working with computers so much we are all human and relate best to other humans. It is invaluable to put a name to a face. I greatly appreciate the Network which is willing to go to the expense of training and supporting travel for its workers. Overall, a great workshop that was productive and enjoyable.

5) The workshops brings together goal, and hands on working on each site webpage, which is very good way of practice. Thanks Organizer!

6) This has been the best workshop that I have attended. The hands-on structure of it, doing while learning was the most effective. Also, having 15 - 30 minutes session of discussing the needs of the attendants and then having hands-on sessions afterwards to meet those needs was what made it perfect. This is perfect for people at all levels of knowledge, since it adapts to their level of expertise. Thanks to Ignigo for organizing this.