User Needs: NYU Classes Site Templating and Carry-Over of Tools

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Templating: Context

Currently, NYU IT is able to provide NYU Classes templates upon request for schools and departments. Although a process has not been formalized, the Classes team has worked with multiple schools\(^1\) to create school-specific course templates. In addition to a formalized process for schools to make such template requests, we propose enabling site templating for individual users. Faculty have requested the ability to create and share their own templates in order to streamline the process of setting up a Classes site, particularly when an instructor's course is regularly offered.

Import Site, Copy from Site, and Templating differ as follows:

- **Import Site**: Copies over *all* content and formatting from an existing site.
- **Copy from Site**: Copies over *selective* pieces of content from an existing site; does not copy any site formatting.
- **Templating**: Defines a precise selection of content *and* formatting to be copied from the template site to any site created from that template.

We understand the main elements of a template as follows:

**Template by default retains:**

- Customized menus
- View/Hide Tool Settings
- Customized tool names
- File structure and content in Resources
- Lessons and Assignments
- Syllabus structure (whether built in the syllabus or lessons tool)
- Gradebook structure (assignment weights, title of assignments)
- Forum topics and threads
- Rich text, images, and other media (within any given tool)
- Site Information pulled from Albert (optional)
- Gradebook scale

**Template eliminates:**

\(^1\) Tandon Online, the School of Law, Stern, Steinhardt, Dental, SPS, Silver Grad, Silver Undergrad
- All student data
- Instructor data (name, email, individual course title); re-populates fields with the relevant variables when a user creates a site from a template

### Templating: Needs

*Note: The needs below essentially follow a cascading model; that is, the needs articulated in Section I also largely apply to Section II; the needs articulated in Sections I and II also largely apply to Section III.*

#### I: Process for Requesting Existing NYU Templates

Currently, a user may build a course from an existing NYU template by using the “import a site” function in NYU Classes; if a user does not choose that option, they will never be aware of the ability to copy content, including folder and Lessons structures, into a site. To facilitate the use of existing templates, we identified the following needs (though note that templates developed within schools and departments are likely to be of the greatest use and are therefore a higher priority):

#### Baseline Needs (must haves)

- Easy availability of templates to users at multiple points in the process:
  - In advance of site creation
  - At time of site creation
  - After site creation
- Each template should have a unique, stable, shareable URL
- Easy Preview of all available templates (e.g. “My Templates” menu item in Home that will go to a gallery of available templates)
- Ability for user either to copy a whole site from a template or to pull elements from a unit template into the user’s course site

#### Eventual Needs (can implement without these, but need to be capabilities in the pipeline)

- Link to gallery of available templates placed in multiple locations (e.g. Classes Home, IT Website, Service Link)
- Documentation of best uses of templates
- Taxonomy of templated sites
  - By pedagogical style
  - By included tools and features
  - By schools and departments
II. Academic Unit (School or Department) Creation/Sharing of Templates

Academic units are currently able to: 1) define a template for a school or department (these are applied at the time of site creation, but users don't have access to the template itself); and 2) create a shared site from which users can copy content (via “Import from Site” or, in the case of Resources, the "Copy Content from My Other Sites" feature). In addition to the considerations above, needs include:

Baseline Needs (must haves)

- A formalized process for units to request templates
- A tool-kit for site templating to be shared with academic units (instructional technologists or the equivalent)

III: Individual Creation/Sharing of Templates

Baseline Needs (must haves)

- Kbase article with instructions
- Ability to easily customize names of tools and option to pull course description from Albert
- Highly visible, one-click “Make This Site a Template” button
- Levels of sharing:
  - Private to user and designees
  - Public within unit
  - Public within NYU

Eventual Needs (can implement without these, but need to be capabilities in the pipeline)

- Ability for user to find relevant templated site in an organized, curated space (see above re taxonomies)
- Deletion of low or no-use templates after a reasonable amount of time
Carry Over of Tools from Semester to Semester: Context

Users reported a number of improvements they would like to see in the process for copying a course site from a past to a current term, as follows:

- The copied site should retain any customized tool names from the past term's site.
- The copied site should retain any customized tool order from the past term's site.
- The copied site should automatically include pilot tools from the past term's site.
- The copied site should retain Site Info copy from the past term's site.