eLion—Organization and Governance

Table of Contents

Executive Summary ........................................................................................................................................... 1

eLion Governance Team ......................................................................................................................... 3

eLion Operations Team ............................................................................................................................. 4

eLion Integration Team ............................................................................................................................. 5

eLion Development Teams ....................................................................................................................... 5

Policy on External Links as Menu Items ................................................................................................... 7

Policy on “Function Pop-ups” ..................................................................................................................... 7

eLion Project Request Process Flow ........................................................................................................... 8

1) Request from a Franchise ....................................................................................................................... 8

2) Request from a non-Franchise ............................................................................................................... 9

eLion Web Standards ................................................................................................................................ 12

Executive Summary
eLion is an interactive information system that enables students to participate in the informed management of their University engagement in academic planning. eLion also enables parents, faculty, advisers, and Penn State administrators to assist students in academic pursuits. The overarching goal of eLion is to provide comprehensive support for academic planning, including enrollment, course, program, financial, and other related elements of academic advising.

**The Penn State eLion Mission is to:**
- provide students access to the information and services needed to initiate and receive academic advising and complete academic programs.
- provide faculty access to the information needed to successfully advise and teach students.
- provide advisers access to the information needed to successfully advise students.
- provide students with efficient administrative processes necessary to confirm their enrollment.
- provide parents/other access to student information with the student’s authorization/permission.

eLion is based upon collaboration. The core organizational concept is the “franchise”. In agreeing to accept the responsibility of a franchise, the sponsoring administrator (i.e., franchise director) agrees to promote the overall purpose and design of eLion. The franchise is responsible for providing membership to the various eLion teams and for the development and maintenance of specific eLion applications. As this document describes, eLion is not “owned” by any single University office or organization. Rather, eLion is governed and managed through a series of collaborative teams that strive to meet the common good of the University’s students, advisers, and faculty, and to improve the advising and related business responsibilities of the franchises.

**eLion Sponsorship:** Integrated Administrative Systems (IAS) Steering Committee

**Franchises:**
- Academic Advising franchise
- Bursar franchise
- Registrar franchise
- Student Aid franchise
**eLion Governance Team**

The members of the Governance Team are appointed by the IAS Steering Committee. The Governance Team is specifically charged with the following responsibilities:

1. To facilitate the eLion mission
2. To review regular reports from the eLion Operations Team of new applications that are approved or denied
3. To receive and approve recommendations from the eLion Operations Team for changes to the eLion Organization and Governance document
4. To provide required IT service levels and operational requirements to the Administrative Information Services (AIS) office
5. To provide guidance to the eLion Operations Team
6. To approve or deny requests for new franchises to join eLion
7. To provide adhoc representation on the IAS Steering Committee

**Membership:**

Membership consists of the senior administrator from each franchise, senior-level representation from the Office of Undergraduate Education and Administrative Information Services, and chair of the eLion Operations team, serving as Liaison between the eLion Governance team and eLion Operations team.

**Current Representatives:**

- Dawn Boyer, Senior Business Analyst for Administrative Information Services
- Mary Beth Crowe, Assistant Dean for Undergraduate Education
- Kathy DeMartino, Chair of the eLion Operations team and Manager Open Standards Development Group, Administrative Information Services
- Anna M. Griswold, Assistant Vice President for Undergraduate Education and Executive Director for Student Aid
- Ronald H. Rash, Senior Director for Administrative Information Services
- Karen Schultz, University Registrar
- Roseann Sieminski, Assistant Controller and University Bursar
- Eric R. White, Executive Director for Division of Undergraduate Studies and Associate Dean for Advising

**Meetings:**

The Governance Team will meet at least quarterly to review progress and reports of new applications on eLion, provide guidance and direction as needed to ensure the mission and vision for eLion, and monitor the strategic direction of eLion.
eLion Operations Team
The Operations Team is composed of representatives from each eLion franchise. The Operations Team oversees the technical management of eLion and is specifically charged with the following responsibilities:

1. Make recommendations for changes to the eLion Organization and Governance Document (including the technical and Web standards).
2. Receive requests for new or revised eLion applications and determine approval or denial of the request.
3. Determine and conduct necessary pre-development and pre-production review of all new and changed applications to ensure functionality on eLion.
4. Conduct periodic review of eLion to ensure overall integrity of the system and its applications, including, when applicable, the use of measurement and assessment tools, focus groups, surveys, and end-user feedback to recommend the need for modification of existing applications. Report status and finding of the periodic reviews to the eLion Governance Team.
5. Maintain general HTML pages that are not application-specific, including the eLion homepage.
6. Identify and resolve eLion operational problems.
7. Maintain an environment conducive to the establishment of new franchises.
8. Coordinate the timing of changes to eLion.
9. Promote the concept of reusability.

Membership:
Each franchise should appoint up to two staff members to this team. The individuals should represent software development, technical writer/editor and Web presentation. Administrative Information Services should also appoint two, consisting of an Operations Team leader and a Web presentation specialist.

Current Representatives:
- Scott Bitner, Applications Systems Analyst Manager, Office of Bursar
- Kathy DeMartino, Manager Open Standards Development Group, Administrative Information Services
- Carol Findley, IT Director, Office of Registrar
- Giovanna Genard, Director of Communications and Student Services, Office of Student Aid
- Tom Harrington, Multi-media Specialist, Administrative Information Services
- Mike Leonard, Assistant Director, Division of Undergraduate Studies
- Bob Quinn, Director of Computer and Technology Service, Office of Student Aid
- Shawn Wagner, Assistant Registrar, Office of Registrar

Meetings:
The eLion Operations Team will meet on a scheduled basis as determined by team members.
**eLion Integration Team**

The eLion Integration team consists of developers in AIS. Their main responsibilities are:

1. To provide on-call as 1st-tier application support around-the-clock (7 days per week)
2. To coordinate code changes from all areas
3. To do general code review
4. To publish eLion production code to the AIS centralized source repository
5. To follow the established process for building test, acceptance, and production images
6. To follow the AIS production control policy for moving changes to production
7. To communicate with other eLion development teams on all changes in eLion for Test, Acceptance and Production
8. To maintain eLion framework code and base images
9. To troubleshoot production problems
10. To ensure eLion application architecture is consistent with AIS infrastructure and system architecture
11. To maintain eLion technical standards and guidelines
12. To monitor industry technology trends and follow best practices
13. To provide technical consulting services to the development teams
14. To follow the AIS DR policy for production and development support

**eLion Development Teams**

Each eLion franchise is responsible for the appointment and staffing of its development team. Each development team is responsible for the design, development, testing, implementation, and maintenance of its eLion applications. Individual franchises may arrange for programming support from the Administrative Information Services office. In doing so, the franchise continues to be responsible for the eLion application(s). The eLion project consists of the following eLion Development Teams:

- Bursar’s office
- Academic Advising
- Registrar’s office
- Student Aid office
- Administrative Information Services

Each development team is specifically charged with the following responsibilities:

1. To develop new eLion applications, while adhering to established eLion Web and technical standards
2. Seek consultation/review from the eLion Operations Team to ensure compliance with standards
3. To maintain previously developed eLion applications
4. To develop an HTML-based demonstration version of their eLion applications for inclusion in the demonstration section of eLion
5. To provide timely responses to e-mail questions associated with their franchise applications
6. Develop “help” documentation for each developed application
Membership:
  Determined by each franchise director.
Policy on External Links as Menu Items
Franchises may request links be placed as a part of the requested application. Such links must be directly related to the purpose of the application. Typically, links are internal to the University; however, external links may be considered.

Non-franchises that request placement of links within eLion are subject to approval by the Governance Team. Links directly related to the purpose and mission of eLion may be considered. Typically, such links relate directly to academic and financial processes or services that are either required or provide important information in support of the student’s academic life.

Please read the “Project Request Process Flow” and the “Link external services as menu items in eLion” sections for instruction.

Policy on “Function Pop-ups”
A “Function Pop-up” in eLion is defined as an application that is required for a user to take an action right after the authentication and before entering the menu page. Any new “Function Pop-up” must be approved by the eLion Governance Team. Multiple “pop-ups” should be carefully planned throughout the year so that a user will not be presented more than two consecutive “Function Pop-ups” within a web session.
eLion Project Request Process Flow

1) Request from a Franchise

Franchise completes eLion Request Form

Operations Team:
1. Reviews the application request with respect to eLion applicability.
2. Notifies Franchise of acceptance or denial of the project.
3. Forwards to Governance Team for information.
4. Performs general pre-production review.
5. Notifies Franchise if AIS Production Turnover review required

Governance Team reviews and has the option to comment to the Operations Team.

Operations Team performs periodic standards conformance reviews of eLion applications.

Required Step

Optional Step

Franchise:
1. Develops application in accordance with both Web and technical standards.
2. Requests joint pre-production review with Operations Team if desired.
3. Notifies eLion Operations Team when ready for production.

The eLion Integration team places new application into production and notifies all eLion Teams.
Development Team is an implementation team identified to develop this request. It could be composed of developers from the non-Franchise (requestor), various Franchises, and AIS.
eLion Project Request Form

Application Name (max 25 characters for new application) ________________________________________
___ New Application    ___ Existing Application

Area of applicability (check all that apply)
___ Students    ___ Advisers
___ Faculty    ___ Former Students
___ Parent/Other

Desired Production Date: __________________

___ Yes   ___ No   The Development Team requests a joint review with the Operations Team.

Description of change or new service:

Instructions:
The intent of this form is to keep all the teams involved with the management of the Penn State eLion system. To ensure the integrity of eLion, each team has the responsibility to provide comments and suggestions to developers that support the purpose, presentation, and operation of eLion.

- **Operations Team**—Reviews the request, forwards to the eLion Governance team for guidance if needed, and notifies the requester the result.
- **Franchise Director**—Responsible for ensuring that the eLion application is consistent with the mission of eLion and that the application satisfies the established eLion Web and technical standards.

Requester: ________________________________ ____________________________ (Contact name/e-mail ID) (Date)

Operations Team: ________________________________ (Approval for development) (Date)

Franchise Director: ________________________________ (Production Approval) (Date)

Or, AIS
eLion Integration Team ________________________________ (Date moved to eLion production)
eLion External Link Request Form
(URL to another Web site or external application on non-eLion server)

Application Name (appears on menus selected below) (max 25 characters):

Area of applicability (check all that apply)
___ Students       ___ Advisers
___ Faculty        ___ Former Students
___ Parent/Other

Desired Production Date: ____________________

1) URL for the external link:

2) Description of the external link:

3) E-mail contact for the external link:

4) Help information for the external link:

Note: The above information will be used to generate a set of standard eLion pages (see an example on the last page).

Instructions:
The intent of this form is to keep all the teams involved with the management of the Penn State eLion system. To ensure the integrity of eLion, each team has the responsibility to provide comments and suggestions to developers that support the purpose, presentation, and operation of eLion.

• **Operations Team**—Reviews the request, forwards to the eLion Governance team for guidance if needed, and notifies the requester the result.

• **Franchise Director**—Responsible for ensuring that the eLion application is consistent with the mission of eLion and that the application satisfies the established eLion Web and technical standards.

Requester: ______________________________      _____________________________
          (Contact name/e-mail ID)      (Date)

Operations Team: ____________________________      _____________________________
                  (Approval for development) (Date)

Franchise Director: ____________________________      _____________________________
                  (Production Approval) (Date)

Or, AIS

eLion Integration Team ____________________________      _____________________________
                  (Date moved to eLion production)
**eLion Web Standards**
These standards follow best practices in Web design and are consistent with and supportive of Penn State editorial and style guides. Collectively, these standards result in predictable presentation and navigation throughout the eLion environment. The Governance Team has endorsed these standards. Application developers are required to adhere to these standards during development of new applications and the modification of existing applications. The eLion Operations Team members (Web managers group and software managers group) are instructed to perform their roles, as defined by the eLion Governance Document, within the boundaries of these standards.

The detail technical instructions for implementing or following these standards are documented in “eLion Technical Standard Guide.”

1. **Penn State Web Editorial Standards**
   All eLion Web pages are to be consistent with the Penn State publication standards including:
   1) Penn State Web Style Guide: [http://webstyleguide.psu.edu/](http://webstyleguide.psu.edu/)
   2) Penn State Editorial Manual: [http://publications.psu.edu/](http://publications.psu.edu/)

2. **Basic eLion Structure**
   1) All eLion services are launched from the eLion home page, [https://elion.psu.edu](https://elion.psu.edu)
   2) There are five primary service areas established for the following user groups:
      a) **Students**: Services available to current students. The student's Penn State Access Account or FPS account must be active in order for the student to use eLion services.
      b) **Advisers**: Services available to any individual at Penn State with academic advising duties.
      c) **Faculty**: Services available to any individual who teaches a course at Penn State and is recorded on ISIS (Integrated Student Information Systems) as an instructor.
      d) **Prospective Students**: Services available to any individual interested in becoming a Penn State student and those individuals who do not have a Penn State Access Account.
         Note: This group is currently under review and could be possibly removed later.
      e) **Parent**: Services available to any individual whose child is a Penn State student and individuals who have either Penn State Access Account or a FPS account.
   3) eLion has been designed around a three-layer presentation:
      a) The eLion home page
      b) Several second-layer service screens (student, faculty, adviser, prospective students, Parent)
      c) Multiple third-layer applications (grades, FTCAP scores, address information, etc.)
   4) All eLion pages follow a two-frame presentation:
      a) The left frame provides basic navigation for services and is the launch point for specific applications.
      b) The right frame provides the basic service that has been requested.
      c) To avoid horizontal scrolling and minimize vertical scrolling, all application design is to be completed in 1024 x 768 screen resolution.
5) In the case of multiple-section applications:
   a) Use subheadings or horizontal lines to separate sections.
   b) Use multiple pages to minimize vertical scrolling.
   c) It is highly desirable to have action buttons visible without the need to vertically scroll down the page.

3. General Page Layout

A typical eLion page is organized in four distinct areas:

Example of a typical eLion page:
4. **Header area**

The header area is located at the top of the page on the right. It shows the system’s banner containing: Penn State University logo and eLion logo.

1) All eLion pages start with a common header as shown below.

   ![eLion Header](image)

2) The Penn State logo is a link to the Penn State home page, [www.psu.edu](http://www.psu.edu).

5. **Sidebar area**

   The sidebar area, located at the left side of the page, is a set of text links that provide access to the eLion applications for the specific user classification.

6. **Footer area**

   The footer area is located at the bottom of the page. It provides Penn State required links and contact information.

   All pages should use the standard eLion footer which will contain:
a. American Disability Act (ADA) statement.
c. The phrase “Contact us” is the link to the responsible franchise office e-mail address or Q&A URL.
d. Text link to Penn State.
e. Date that the application was last modified.

Footer example:

___________________________________________
___________________________________________
Privacy and Legal Statements | Copyright | Browser Compatibility
For assistance, Contact us | ©2009 The Pennsylvania State University
Last Update: October 5, 2009.

7. Application area
The application area consists of Application Header area, Application Message area,
and Application content

8. Application Header area
Application Header area must have Application title, Help link, and Logout link.

9. Application Message area
Application Message area is for displaying Error/Confirmation/Warning/Informational
message.

Example GUI:
Message box
a) 1 point border
b) Title
   Font color: black (#000000)
   Font type: Arial
   Font size: H3
c) Message Text
   Font color: black (#000000)
   Font type: Arial
   Font size: 12 point

10. Verbiage
1) Penn State-related phrases and words:
   a) Penn State Access Account
   b) Penn State e-mail address
   c) Adviser

2) Franchise References:
   a) Avoid references to franchises wherever possible. eLion prides itself in offering
      services to its constituents without having to identify each franchise.
   b) If it is necessary to identify the franchise office, identify it by its full name (e.g.,
      Office of Student Loans and Scholarships) rather than using “we” or “our office,”
      and link to the office e-mail address, home page, or appropriate contact page.

3) Within text and help descriptions, do not use the phrase “this application.” Use the
   name of the application. Example: “The <application name> application enables you
   to…..”

4) Use the term “Click” or “select.”
11. Page Background
   1) Background color: white (#FFFFFF)

12. Text
   1) Font color: black (#000000).
   2) Font size: 12 point.
   3) Left justify.
   4) Use bullets to present a list. Be cautious of excessively increasing vertical scrolling.

13. Graphics
   1) Do not use animated text or images.
   2) Do not use images other than the eLion header unless the image enhances the function of the application.

14. Capitalization
   1) All text and titles are to be sentence case.
   2) Where it will improve clarity, data obtained from databases (i.e. ISIS, IBIS) should be converted to upper/lower case. Obtained codes and abbreviated values are generally best displayed in upper case.

15. Labels
   1) Font color: black (#000000).
   2) Font type: bold Arial.
   3) Font size: 12 point.
   4) Information after label should be normal text.
   5) Left justify.
   6) Title caps if label is a fragment.
   7) Sentence case if label is a complete sentence.

16. Links
   1) Link: blue (#003366)
   2) Vlink: gray (#666666)
   3) Add JavaScript to bring second browser window to the front:
      ```javascript
      window_handle =
      window_handle.focus();
      ```
   4) Force Help pages and other outside links to front of browser

17. Tables
   1) Tables should only be used for tabular data.
   2) Tables should be shaded by alternative rows.
   Example (Read the eLion Technical Guide on implementation):
18. Important Text
1) Font color: black (#000000).
2) Font type: bold Arial.
3) Font size: 12 point.
4) Do not use all UPPER CASE or italics for emphasis.
5) Do not use excessive bold text for emphasis, as it will diminish the importance of the noted text.

19. Punctuation
1) When at the end of a quoted sentence or phrase, commas and periods must be placed within quotation marks.
2) Do not use single quotation marks (‘example’) except for the rare occasion of a quotation within a quotation. Use double quotation marks (“example”).
3) For a more complete reference on punctuation, please see the Penn State Editorial Style Manual: www.psu.edu/ur/PUBS/style/index.html

20. Action Button
1) Keep the number of action buttons to a minimum. Left justify buttons on a separate line, or display a left-justified row of multiple buttons (no more than four) of similar sizes. A combination of like buttons can be on the same line.
2) Except for proper nouns, only first word on each button is capitalized.

21. PDF files
1) Open a new browser window with the following HTML page:
You need to install the free Adobe Acrobat Reader software PDF in order to view and print the following PDF file. Continue to <form name> Form.
2) PDF image is a link to Adobe: http://www.adobe.com/products/acrobat/readstep.html
3) If possible, convert all PDF files to HTML files.
4) Take user directly to the PDF.

22. eLion Home Page
1) The eLion Home Page contains three sections: Logi
2) The Login section provides the launch point for the primary service groups.
3) The Information section provides links to general information related to eLion.
4) The Messages and Alerts section provides announcements that are timely in nature and dynamic over time. It is intended to be a newswire information sources to eLion user groups. This section does not display when there aren't any messages and alerts.
23. **Personal/General Message Page**

1) **Personal Messages**
   a) Personal messages are very effective way to provide critical and timely information to the specific person.
   b) Personal messages are displayed after the eLion user authenticates. All personal messages are accessed from the appropriate “My eLion” page.
   c) Personal messages are developed by an eLion franchise.
   d) The messages are intended to be informative and instructional. They are placed and removed as dictated by the specific scenario.

2) **General Messages**
   a) Because of the high number of eLion users, the eLion home page is a very effective way to announce a general message targeted to students, faculty, advisers, and parents.
   b) The message must be endorsed by an eLion franchise.
   c) Each message is handled by each franchise.
   d) Keep in mind the eLion audience. The message should be of general interest to students, faculty, advisers, or parents. General messages may be displayed from the eLion Home Page, or from the “My eLion” page that follows after authentication.

24. **eLion Help Page**

1) Each eLion application is supported with application-specific help information. Development and maintenance of the help information is the responsibility of the franchise development team.
2) Application-specific help is launched from the "Help" link after the application title. The help is displayed automatically in another Web browser session.
3) Each category help menu contains a brief description of each application within the category.

25. **Link external services as menu items in eLion**

1) Must implement a standard eLion page with service description, help page, contact information (see example below)
Standard GUI presentation for adding an external link in eLion

1. Main page (Example: Housing/eLiving)
   - Application name
   - Description of the external link
   - Help link

   ![Image of eLion application]

   **Housing/eLiving**

   The Housing/eLiving link is provided for your convenience to assist you in managing your on-campus housing and food service information. The link will open a new web browser window.

   eLiving is a tool that allows you to request and/or manage a housing and food service contract at any residential Penn State campus. Common functions include adding your name to a waitlist for housing, submitting housing preferences, checking on your housing assignment, or changing your meal plan level. Different policies and guidelines exist for obtaining housing at each residential campus depending on the type of student you are (incoming freshmen, transfer, returning) so it is important that you read the information in eLiving that pertains to you. If you have any questions, contact housing at the campus that is of interest to you.

   You are now leaving eLion and transferring to Housing/eLiving

   Email contact for the external link: Example: support@email.hfs.psu.edu

2. Help page as 2nd window

   ![Image of Help page]

   **Help for Housing OnCampus**

   The Department of Housing, Food Services and Residence Life is dedicated to providing clean and secure facilities, nutritional and varied menus and a wide scope of programs and services designed specifically to enhance the educational and social well being of our on-campus residents.

   If you experience any problems, please contact Penn State Auxiliary and Business Services: support@email.hfs.psu.edu

   For more information about eLiving, please contact: University Park: assignmentoffice@psu.edu, 814-865-7501
   Commonwealth Campuses: feedbackCWHMs@psu.edu, 814-865-7862
26. Secondary Browser Window
   1) When linking to a page outside of eLion, open a secondary browser window in the upper left quadrant of the display screen.
   2) Use this secondary window to display the non-eLion application.

27. Display of Student Name and ID Number
   1) eLion is a secure Web service; however, developers must remember that these services are often launched from public areas, such as computer labs and kiosks.
   2) To ensure confidentiality and record security, the display of student name should be avoided. The display of the complete student-ID number is prohibited unless approved by the eLion Governance and Operations teams. If required to specifically identify the student, the name and last four digits may be displayed. Example *****1234

28. eLion Demo
   1) Each eLion application is to be demonstrated as a static presentation.
   2) Development of the demonstration is the responsibility of the development team.
   3) The purpose of the demo is to provide a realistic and instructive use of the application.
   4) The eLion demo does not require authentication.
   5) The demo pages are to be replicas of the production pages. The demo pages may contain additional text and navigational aids in support of assisting the user in choosing multiple demonstration scenarios and in identifying pre-determined static links.
   6) To clearly distinguish the demo from production, all eLion demo pages will contain the “eLion demo” banner.
   7) The eLion demo operates with static pages in the predefined demo directory structure.
   8) To direct the use of the demo, blue navigation arrows must be used in all demo applications. Place the blue arrows to the left of those navigation elements/buttons that are available to the user.
   9) For complicated applications, multiple scenarios may be created for the application. In such cases, additional text should be added to guide the user through the different scenarios.

29. More example of eLion Pages
Early Progress Report

Instructions

The following contains the list of students who you have identified as making unsatisfactory progress. Select the reason for the students unsatisfactory progress from the drop-down list. You may select multiple reasons by holding down the Ctrl key (Command key on Mac) while selecting each reason. Also please record the students attendance information. Optionally, you may add a short comment in the text box for each student. Once you have completed the evaluation, select the Submit Early Progress Report button.

Note: Please use the navigational buttons provided within this application. Do NOT use your web browsers back button.

Student Evaluation

Instructor: Findley, Carol S  Semester: Spring 2009  Campus: UNIVERSITY PARK  Course: GER 301  Sections: 002

<table>
<thead>
<tr>
<th>Name</th>
<th>PSU ID</th>
<th>Reason</th>
<th>Attendance Problems</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>KASAKLO, STEVEN</td>
<td>1954</td>
<td>LOW SCORES ON TESTS/EXAMS</td>
<td>Please select attendance...</td>
<td>Assignments are worth 20% of your grade.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>LOW SCORES ON QUIZES</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>UNSAT PERF ON ASSIGNMENTS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit Early Progress Report  Cancel