

FacultyStaffDirectory at UNAM

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Joint work with:

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Institute of Mathematics
Universidad Nacional A. de México



Overview of the talk

- Background
- First solution
- Second solution
- Conclusions

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Who are we?
What was our problem?
How did we approach it?

Overview of the talk

- Background
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Why a CMS?
Why Plone?
Our first Plone
implementation

Overview of the talk

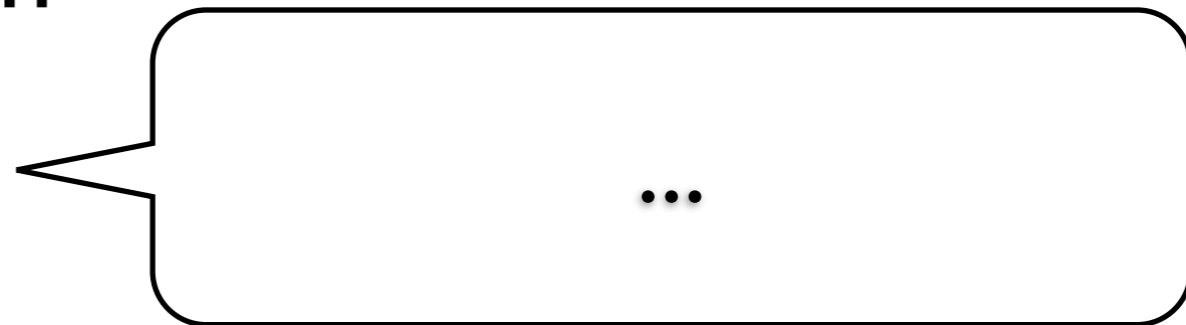
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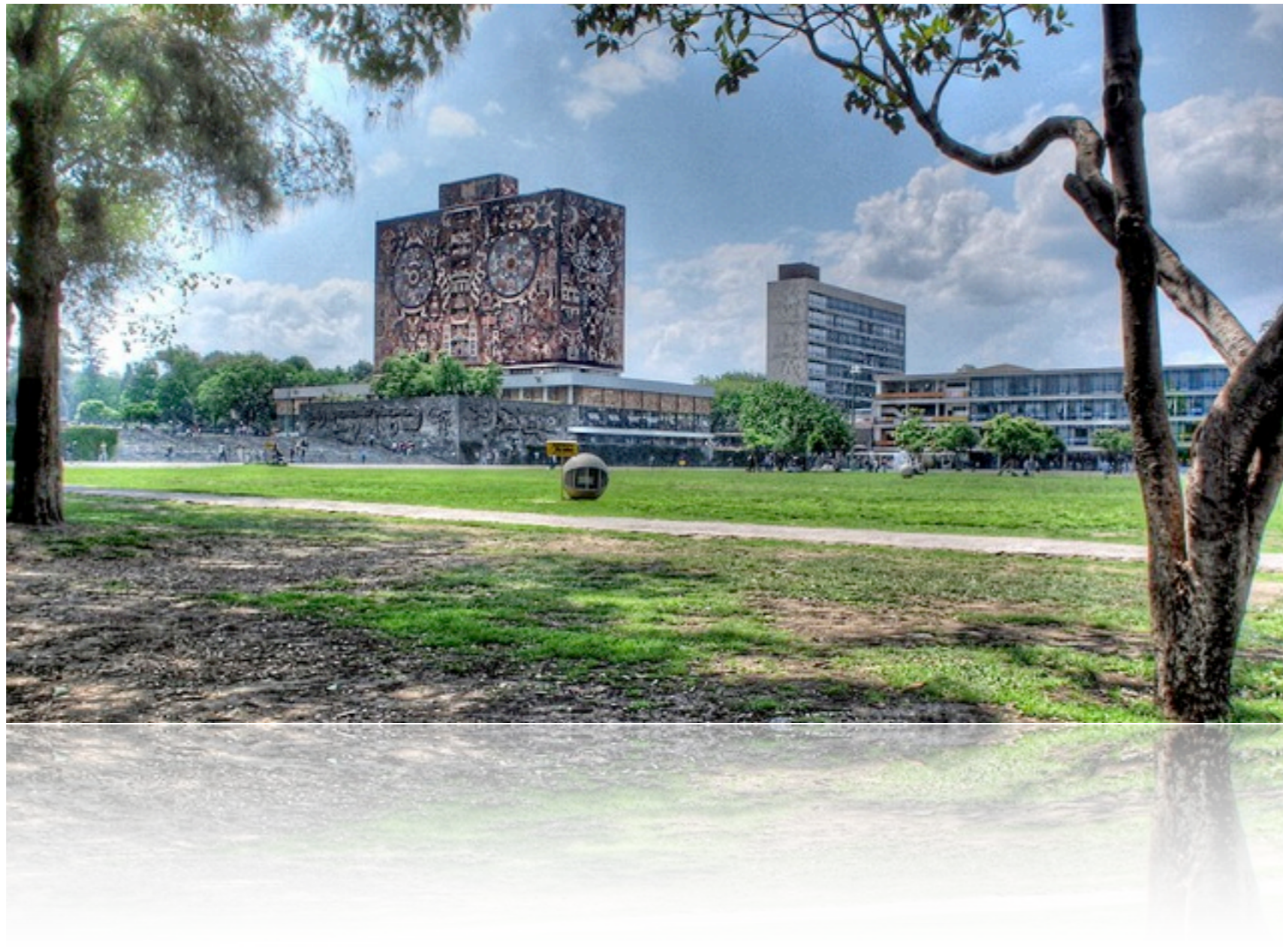


FacultyStaffDirectory

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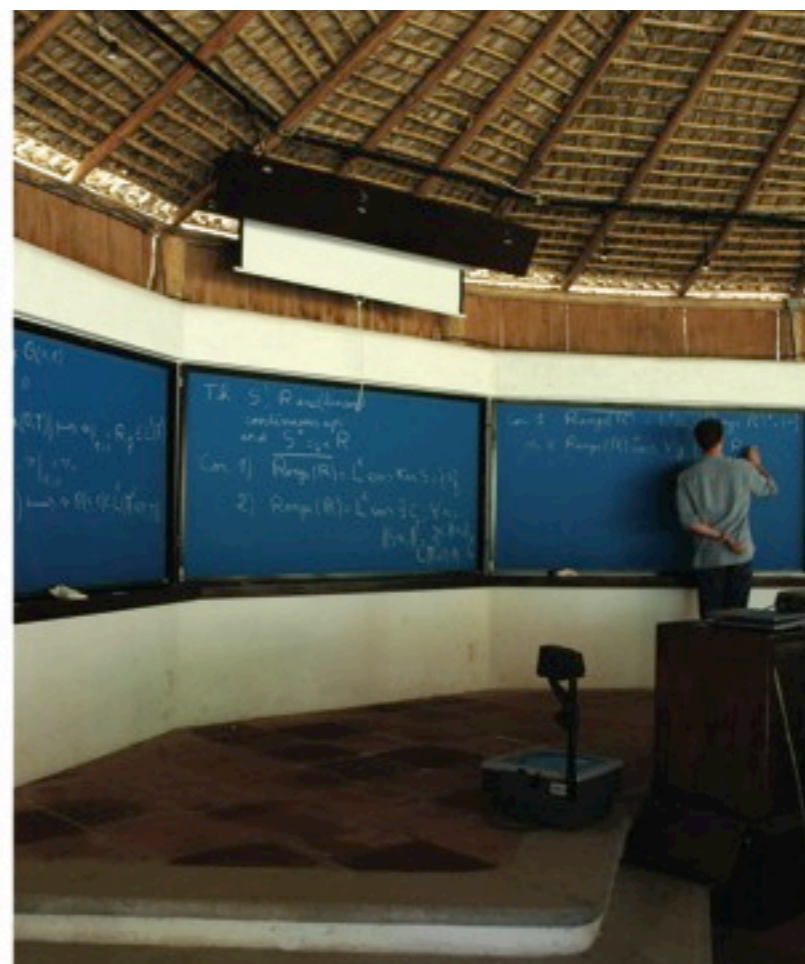


Who are we?

UNAM

(National Autonomous University of Mexico)

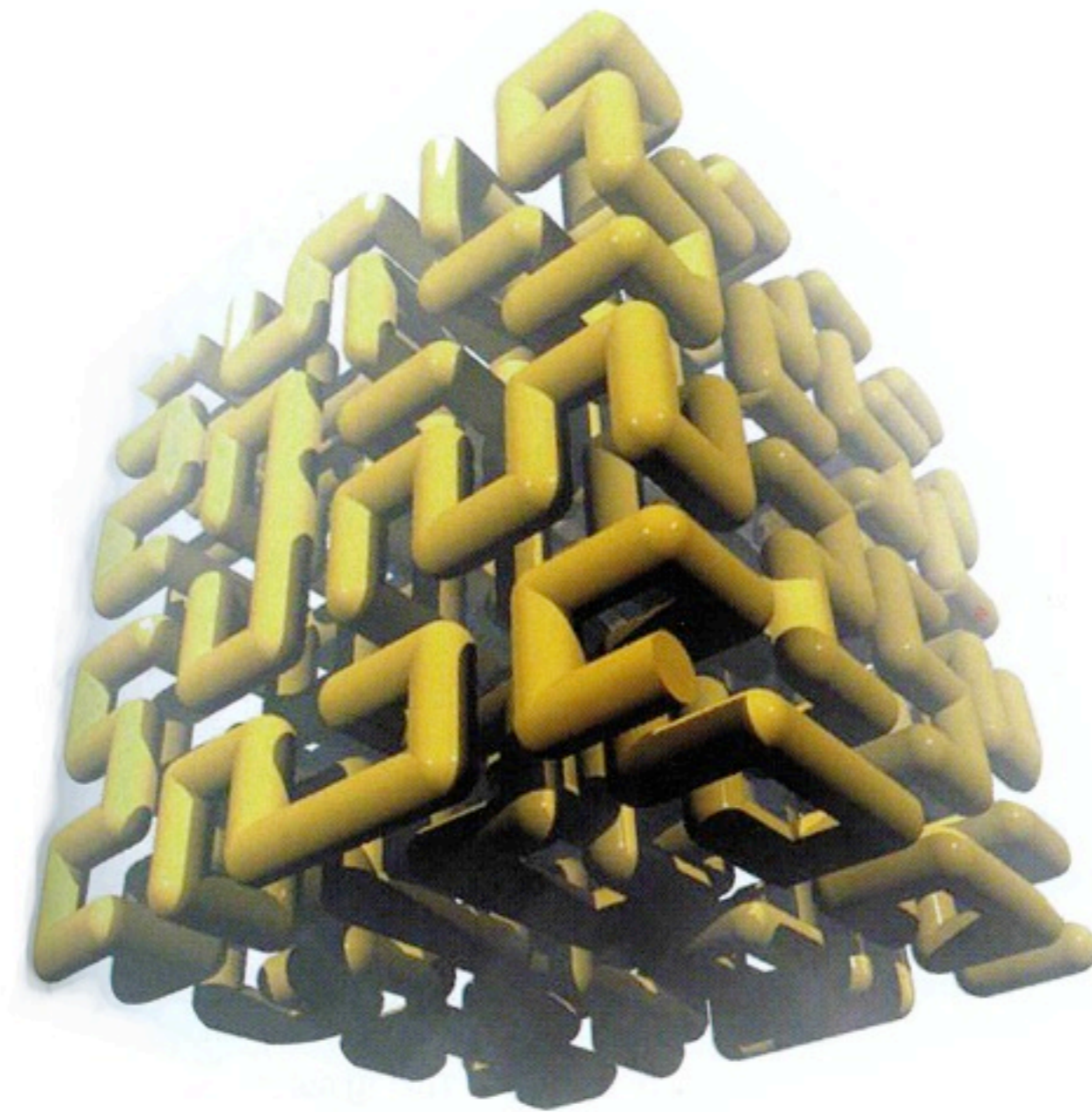
- One of the largest universities in Latin America with ~400,000 people
- Includes high-schools, undergrad colleges, graduate schools, research institutes
- Over 40% of Mexican research



**We are at the Institute
of Mathematics**

Institute of Mathematics (IM)

- Branches in Cuernavaca (picture), Morelia and Mexico City (we)
- 100 researchers + staff and students
- Mostly research, each faculty teaches 2 courses per year (at the colleges and grad school)
- Among the top 2 in Latin America



Our problem

Initial motivation

Every year several individual and global reports of academic production are required

Individual reports

- Faculty members report to obtain promotions and salary bonuses
- papers, teaching, travel, grants, etc etc etc
- at least once a year, sometimes 2 or even 3 times in a year
- to IM, to UNAM, and to Conacyt (NSF)

**1/2 of their
income
depends on
report
evaluations**



Global reports

- IM reports summaries and statistics of the individual reports and other data
- these reports are needed several times a year



**How was all this solved?
(Until 2006)**



**Many hours of many
people**

Reports in different formats and media...

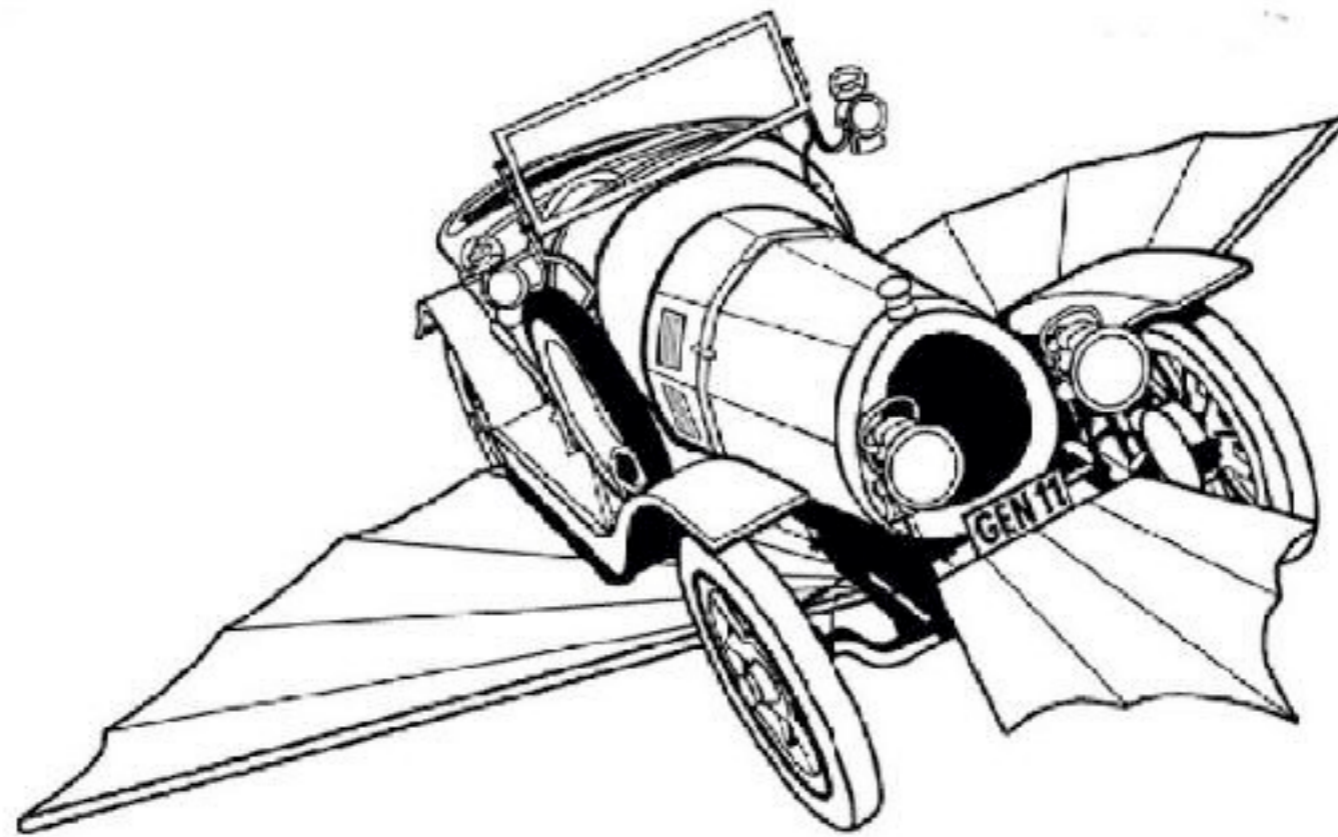


Faculty data split in different departments...

- redundant information
- inconsistent information

... and also in different
formats...





2006

Other problems

- application forms
- expenses management (travel, visitors)
- elections
- etc

... and poor Web presence

- outdated information
- manual process for publicizing of events
- inconsistent styles
- only spanish
- not compliant with web standards



**We needed more than
just a Web site!**

Approach: CMS

Why CMS?

- CMS 's are great !

Why CMS?

- CMS 's are great !



independence
reliability
shared work
security

Why a CMS for us?

- we have few programmers (only 3)
- we want to focus on our real problem (search, reports, process, etc) instead of on low level programming
- reliability and security



Which CMS?





Why Plone?

- Plone is great!!

Why Plone?

- Plone is great!!

open source
secure
workflow
search tool
internationalization
many products
...

Why Plone for us?

We wanted an ***academic*** project, involving
not only staff, but also:
students, publications, knowledge production
and dissemination

Plone is perfect for academia

- is written in Python, a well-designed language
- is designed to extend and collaborate
- a professional, well-organized and collaborative community
- free and open source



**our first plone
implementation**

*info*Matem 1.0

- development done in six months
- operational since december 2006
- Plone 2.1
- attracted attention in the UNAM community
- and most important ...

*info*Matem 1.0

- development done in six months
- operational since december 2006
- Plone 2.1
- attracted attention in the UNAM community
- and most important ... *no revolts !*



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navigation

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- [Actividades](#)
- [Secretaría Técnica](#)
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log in

Login Name

Password

[Forgot your password?](#)

Instituto de Matemáticas Information System

by [Gildardo](#) — last modified 2009-04-27 16:43

What we do, who we are - a site for internal and external sharing of information.

- [Instituto de Matemáticas Home page](#)
- [UNAM Home page](#)
- [Directory Members of the Instituto de Matemáticas](#)
- [Where is the Instituto de Matemáticas located](#)

[Contingency information related to Influenza](#)

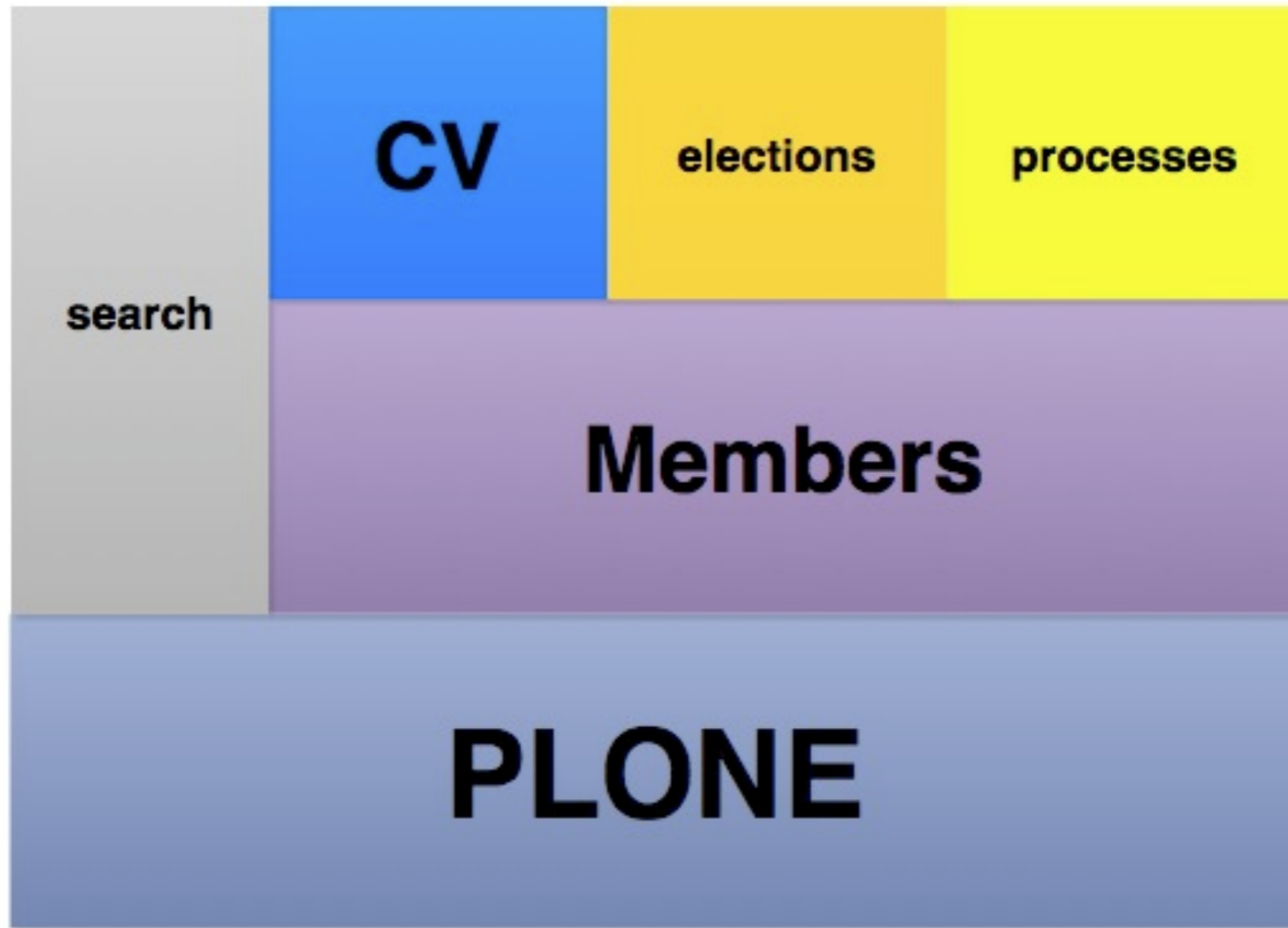
Comments: admin@info.matem.unam.mx

[How to start](#): a brief description of how to use the system

news

- [Convocatoria al Programa de Becas Posdoctorales en la UNAM 2009](#)
2009-05-07
- [UNAM - Mensaje del Rector](#)
2009-05-07
- [Comunicado del Director sobre el retorno.](#)
2009-05-06
- [Comunicado del Jefe de la Unidad Morelia sobre el retorno.](#)
2009-05-06
- [Comunicado del Jefe de la Unidad Cuernavaca sobre el retorno.](#)
2009-05-06

operated successfully



Architecture

CV

elections

processes

search

Members

PLONE

Architecture

Members

Remaining of the talk
(stay for next talk to hear about CV)

IM organization

- Member types: Faculty, Staff, Students.



- Departments:
- Committees

IM organization

- Member types: Faculty, Staff, Students.



- Departments: Accounting, projects, publications, etc.



- Committees:

IM organization

- Member types: Faculty, Staff, Students.



- Departments: Accounting, projects, publications, etc.



- Committees: Computer, evaluation, etc.



Members requirements

- Member types have different attributes
- security levels for member data:
 - fields public to everybody (e.g. name, last name)
 - fields visible only to members (e.g. promotions)
 - fields visible to privileged members (e.g. address, or mobile phone)

CMFMember

- Turns members in real content types, which make them extensible
- Product for Plone 2.1

CMFMember extension

- We have one content type per member type (faculty, staff, student)
- granular security in visibility and editing of member data
- custom view (hide empty fields)
- ~50 fields in the schema, divided in seven schematas

visualizar editar propiedades acciones ▾ agregar a carpeta ▾ estado: registered user, public profile ▾

Editar Investigador

por [Sergio Rajsbaum](#) — Última modificación 28/05/2009 16:23
+ Histórico

[default] [Datos personales privados] [Puesto Actual] [Estímulos] [Formación Académica] [Situación Laboral] [llaves]

Estos datos son PUBLICOS.

Nombre ▀

Apellido Paterno ▀

Apellido Materno
(opcional).

Nombre corto
Escriba su nombre como quiera que aparezca en el sitio

E-mail ▀

Faculty edit form

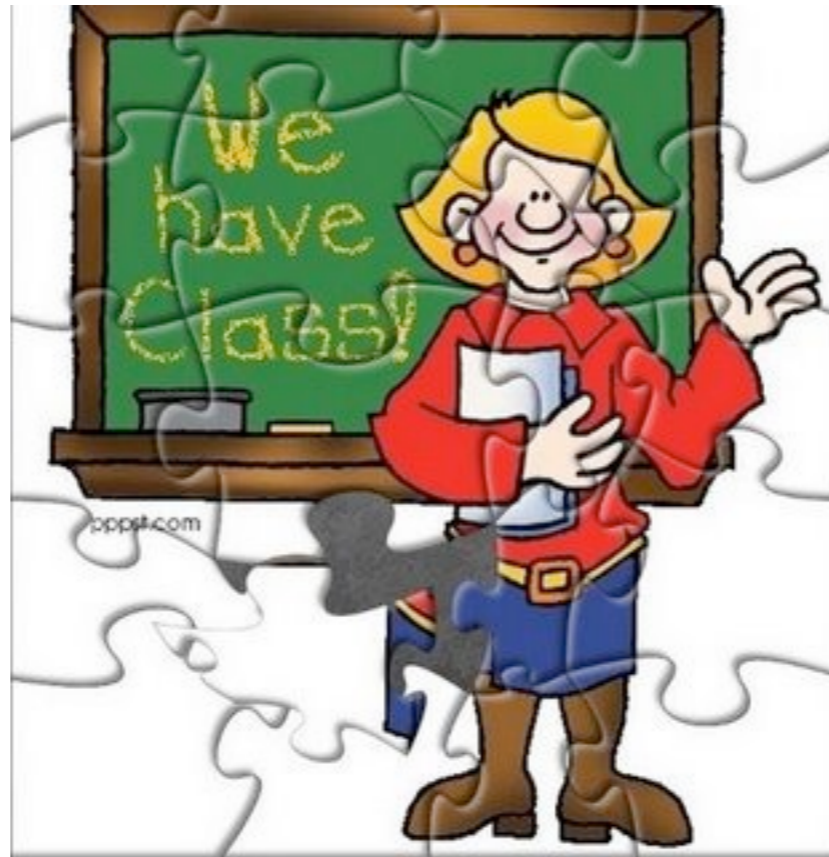
Extensively use of grouping features

- for branches
- for member types
- for departments
- for comities



What can we do now?

Consistent member data



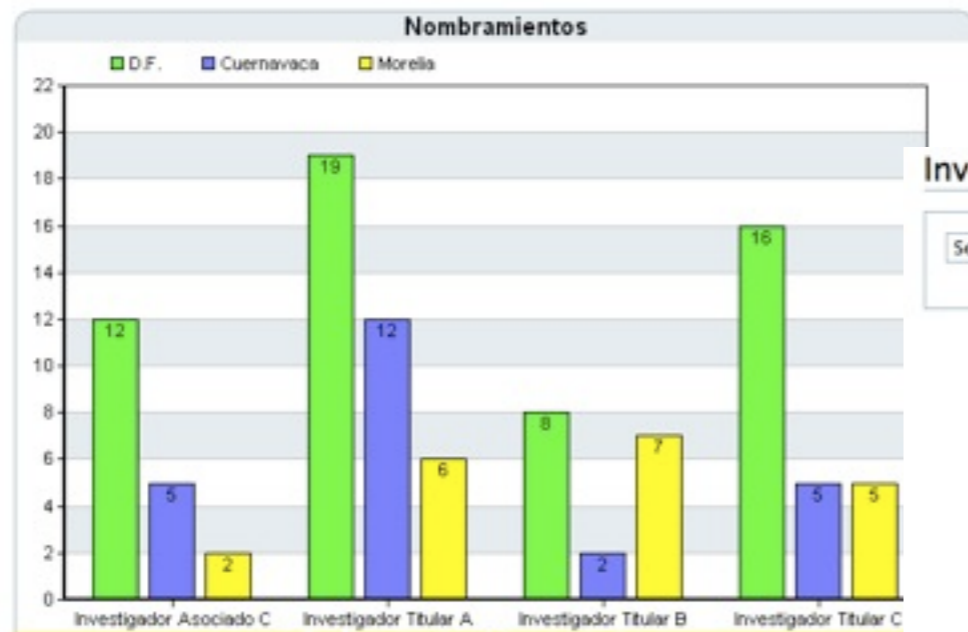


Flexible searches

Statistics in real time

Investigadores: Estadísticas 2007

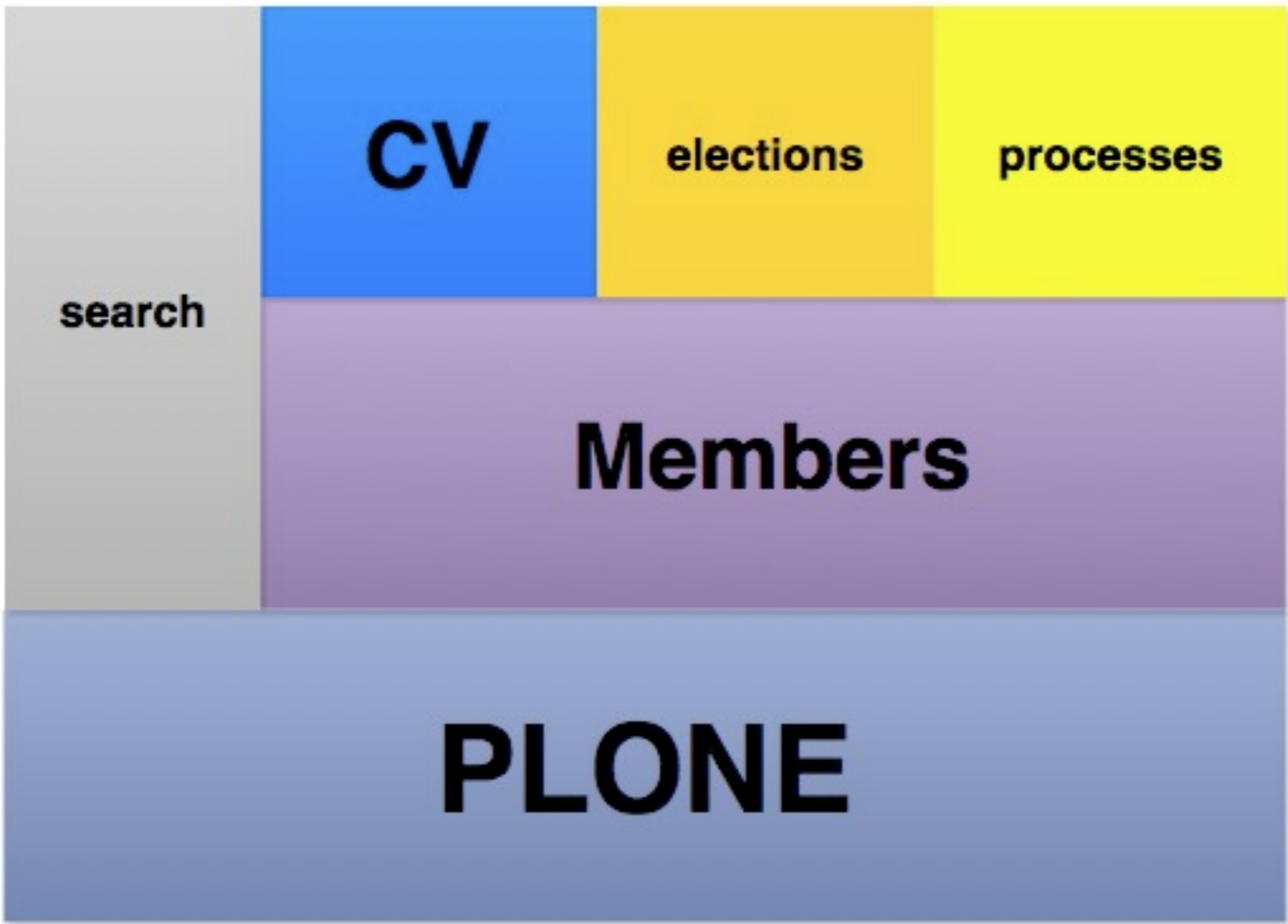
Nombramiento Global Barras 3D



Investigadores: Estadísticas 2007

Sexo Global Pie 3D

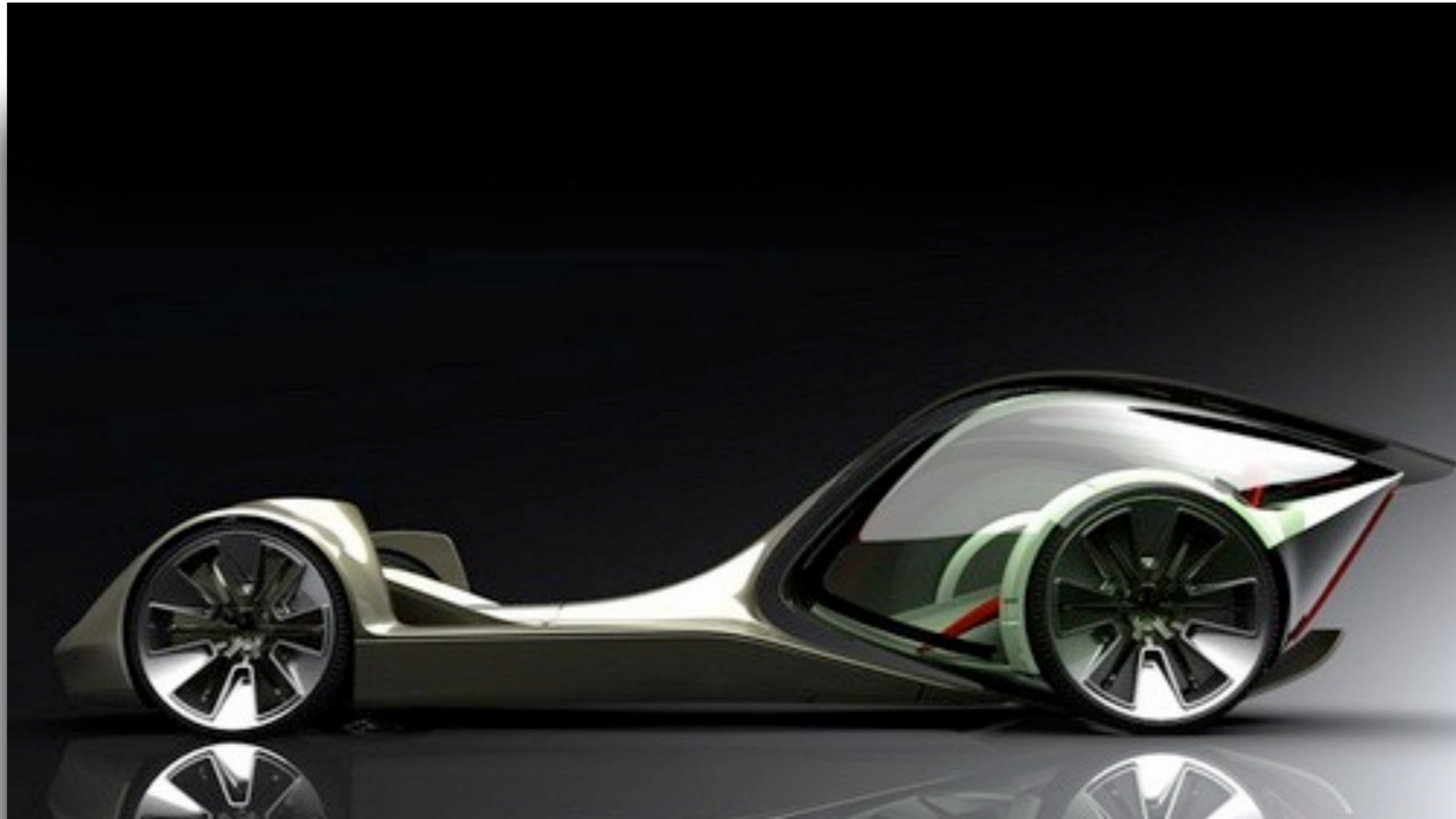




What is missing?

What is missing? (in members)

- keep **history** of selected fields (e.g promotions)
- keep **history** of when you enter or live a group
- new skin for members views



Second solution

Plone 3

First problem migrating to plone 3

- CMFMember does not work in Plone 3

Solution



FacultyStaffDirectory

FacultyStaffDirectory features

- Person
- Classifications (e.g. Faculty, staff, Graduate Students)
- Committees
- Departments
- Specialities

Extending FacultyStaffDirectory

- New product to extend FSD to our requirements - `matem.fsdextender`
- product created with paster but base in the FSD extension example.

Adjustments to Person

Contents View Edit Sharing History Relations

Edit Person

[\[Basic Information\]](#) [\[Contact Information\]](#) [\[Professional Information\]](#) [\[User Settings\]](#) [\[categorization\]](#) [\[dates\]](#) [\[ownership\]](#) [\[settings\]](#)

Holds information about a single person

Email

Office Street Address

Office City

Office State

Office Postal Code

Office Phone
Example: (555) 555-5555

Save as new version
Select to make a version of the current content.

[Previous](#) [Next](#) [Save](#) [Cancel](#)

Contenidos Visualizar Editar Compartir Historial

Navegación

- Investigadores
- Técnicos Académicos
- Graduate Students
- Committees
- Consejo Interno**
- Specialties

[Administrar portlets](#)

Consejo Interno

Miembros:

- [Eduardo Espinosa, eduardo](#) [[Asigna un rol](#)]
- [Michael Barot Schlatter](#) - **Presidente** [[Editar rol](#)]
- [Javier Bracho Carpizo](#) [[Asigna un rol](#)]
- [Mónica Alicia Clapp Jiménez Labora](#) [[Asigna un rol](#)]
- [Mario Eudave Muñoz](#) [[Asigna un rol](#)]
- [Christof Geiss Hahn](#) [[Asigna un rol](#)]
- [Luis Montejano Peimbert](#) [[Asigna un rol](#)]
- [Sergio Rajsbaum Gorodezky](#) [[Asigna un rol](#)]
- [Ernesto Rosales González](#) [[Asigna un rol](#)]

Committees

Líneas de Investigación

Dudas acerca de la clasificación y como encontrar un area, acceder a la pagina oficial del [ams](#)



Specialities in Plone 2.1

Navegación

- Investigadores
- Técnicos Académicos
- Graduate Students
- Committees
- Specialties**
 - Análisis funcional
 - Topología general
 - Geometría algebraica
 - Combinatoria
 - Anillos asociativos y álgebras
 - Anillos y álgebras no asociativas
 - Teoría de categorías; álgebra homológica
 - Grupos topológicos, grupos de Lie
 - Topología algebraica
 - Ecuaciones diferenciales

Specialties

[Anillos asociativos y álgebras](#)

[Anillos y álgebras no asociativas](#)

[Análisis armónico abstracto](#)

[Análisis de Fourier](#)

[Análisis funcional](#)

[Análisis global, análisis de variedades](#)

[Ciencias de la computación](#)

[Combinatoria](#)

[Cálculo de variaciones y control óptimo; optimización](#)

[Ecuaciones diferenciales ordinarias](#)

[Ecuaciones diferenciales parciales](#)

[Educación matemática](#)

[Estadística](#)

[General](#)

[Geometría](#)

[Geometría algebraica](#)

[Geometría convexa y discreta](#)

[Geometría diferencial](#)

[Grupos topológicos, grupos de Lie](#)

[Lógica matemática y fundamentos](#)

[Sistemas dinámicos y teoría ergódica](#)

[Teoría de categorías; álgebra homológica](#)

[Teoría cuántica](#)

[Teoría de grupos y generalizaciones](#)

[Teoría de operadores](#)

[Teoría de probabilidad y procesos estocásticos](#)

[Teoría de sistemas; control](#)

[Topología algebraica](#)

[Topología general](#)

[Variedades y complejos de celdas](#)

[Álgebra lineal y multilineal; teoría de matrices](#)

[Órdenes, lattices, estructuras algebraicas ordenadas](#)

- 📁 Técnicos Académicos
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 - 📁 Teoría de operadores

Topología algebraica

Gente especializada en esta área

Investigadores



Marcelo Alberto Aguilar González de la Vega

[[Asigna un área de investigación](#)]

[Más datos...](#)



Mónica Alicia Clapp Jiménez Labora

[[Asigna un área de investigación](#)]

[Más datos...](#)



Carlos Prieto de Castro

[[Asigna un área de investigación](#)]

[Más datos...](#)

... extending FSD ...

- Translating content types to spanish
- Custom views to show our fields

How partially manage field history?

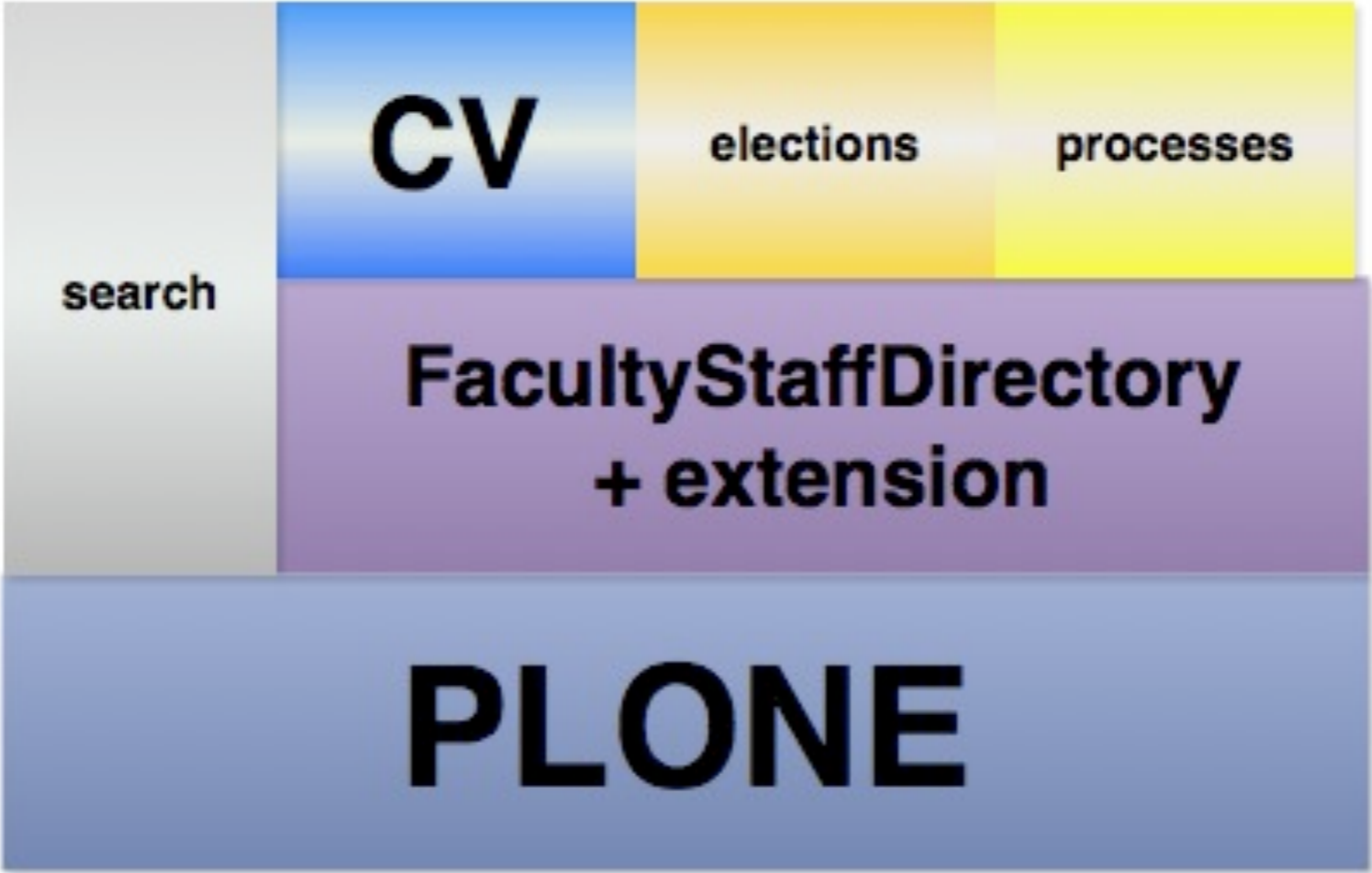
Skills
Language/technology/tool/method relevant for work

Skill	Level	
Wooasdf	Basic	X
123123	Good	X

Positions
The current position and prior work experience

Employer	Duration	Description	
23	23	2	X
123	123	213	X

DataGridfield



Conclusions

- We make the right choice
- We are learning to work as a community
- We are trying to impulse Plone in Mexico

Phone Mexico Users group

Questions?

Thanks