Membership Management & Tracking Tool

# Requirements Gathering Document

## Introduction

This document contains a list of *general requirements* for building a membership management & tracking system, to be used primarily by the Eisenberg Family Depression Center but keeping in mind that the tool could be re-used by other U-M centers and institutes. The requirements table contains the following information:

* Type of information - what type of information is needed for a specific area.
* Data sources - where does the information come from? Is the information being pulled or pushed to another system?
* Potential Lists, Terms and Tables Needed - what SharePoint Lists, Term Stores, or Database Tables are needed to store the information?
* Metrics - what metrics can be derived from this information? This will inform dashboard development.
* Questions/Notes - what issues or questions remain? Are there important notes to keep in mind?

## Notes

* This tool is being built on top of SharePoint Online to simplify development
* Automations will occur via Power Automate, custom scripts, or both
* Reports and dashboards will be hosted in Tableau Server, but can be embedded in the site
* All Lists should have the Attachments field enabled, comments option enabled, and a Notes field (multi-line plain text)

##

## Requirements

| Type of information | Data Source(s) | Potential Lists, Terms and Tables Needed (Gabriel) | Metrics | Questions/Notes |
| --- | --- | --- | --- | --- |
| **Publications*** Publication name
* Author and contributors
* Publication date
* Publication type
* # Citations
* Abstract
* Keywords (extracted from abstract)
	+ E.g., “fitbit”, “apple watch”, “mental health”, “depression”
* Topic (formed by grouping certain keywords together)
	+ E.g. “Mobile Tech” is anything containing the keywords “fitbit” or “apple watch”; “Mental Health” is anything containing the keywords “Depression”, “Mental Health”, “Anxiety” or “PTSD”.
 | * Michigan Research Experts
	+ Name, unique name, publication name, type, date, citations (# of papers citing this publication), publication abstract
* Members List
* Center members
* Customers
* Faculty Leads
* Department
* Job Title
* School Affiliation
 | **“Publication Topics” Term Store*** Mental Health
	+ Depression
	+ Depressive Disorder
	+ Anxiety
	+ PTSD
	+ Post-Traumatic Stress
	+ Bipolar
	+ Affective Disorder
	+ Mind
	+ Mood
* Mobile Tech
	+ Fitbit
	+ Apple Watch
	+ Apple Health
	+ HealthKit
	+ SensorKit
	+ Garmin
	+ Oura Ring
	+ Smartwatch
	+ Wireless Blood Pressure
	+ CGM
	+ Glucose Monitor
	+ Bluetooth
* Public Health
* Other

**“Publications” List*** Publication Title (text) - rename the default Title column
* Primary Investigator (lookup field against People List)
* Authors (multi-select lookup field against People List)
* Publication Type (single-select choice) - get types from MRE
* Publication Date (date)
* Journal Name (text)
* No of Citations (whole number)
* Publication Summary (multi-line text, no rich text)
* Keywords (CSV) (text)- OR -Keywords (multi-select Term Store, sub-term(s) under the terms that define Topics)
* Primary Topic (single-select Term Store)
* Secondary Topic (single-select Term Store)
 | 1. Total # of Publications For All Members
	1. Filter By Keywords/Managed Terms
2. Avg. Publications Per Member
	1. Group/Filter by Faculty Type (e.g. assistant vs full-time professors)
	2. Group/Filter By Department
	3. Group/Filter By School Affiliation
	4. Filter By Keywords/Managed Terms
3. Avg. Publications Per Month/Quarter
	1. Filter By Keywords/Managed Terms
 | Not having this in SharePoint means we can’t filter for people by publication keywords directly in SharePoint, without going through Tableau. It makes sense to automate bringing this data into SharePoint.Primary/Secondary topic would be decided by sorting topics from the one with the most keywords to the one with the least. For example, if a publication contains “fitbit” twice, then the “Mobile Tech” topic would have a keyword count of 2. If it also contains “depression” once, “anxiety” once, and “PTSD” once, then the “Mental Health” topic would have a keyword count of 3. When sorted, “Mental Health” would be primary since the publication has 3 matching keywords, while “Mobile Tech” would be the secondary topic since it only has 2 matching keywords. |
| **Membership Info**1. Bio / Profiles
2. Title
3. Department Affiliation
4. School Affiliation
5. Can there be a trigger if bio changes in Michigan Research Experts
 | * Conni’s member spreadsheet (for initial load only)
* MCommunity - MExperts-Depression.Center@umich.edu (push to MCommunity)
* Department API (department, job title)
* MRE
	+ **school affiliation**???
	+ Bio
	+ ORCID
	+ MRE ID
	+ PUBLICATIONS.USR table has full name, first name, initials, email, uniqname/userid, primary job title (usr\_pstn?), primary appointment department ID, primary group (seems to be a mix of parent departments and schools).
* MRE (bio)
* Services/events lists
 | **“People” List*** Full Name (text) - rename the default Title column
* UniqName (text, unique, not required)
* Teams Account (People field, unique, not required)
* Honorific (single-choice list)
	+ Mr., Ms., Mrs., Mx., Dr., Sir, Rev., Rev. Dr., Ing., Eur. Ing., Professor, Father, Mother, Sis., Fr., Pr., Br., Sr., Elder, Rabbi, Imām, Shaykh, Emi., Rōshi, Sensei, Ven.
* First Name (text)
* Last Name (text)
* Job Title (text)
* Company (single-select choice, allow fill-in choices)
* Department (single-select choice, allow fill-in choices)
* School Affiliation (single-select choice, allow fill-in choices)
* Business Phone (text)
* Mobile Phone (text)
* Home Phone (text)
* Fax Number (text)
* Address (text)
* City (text)
* State/Province (single-select choice, allow fill-in choices)
* Country/Region (single-select choice, allow fill-in choices)
* Depression Center Profile (URL)
* Website (URL)
* Twitter (text)
* GitHub (text)
* Facebook (text)
* LinkedIn (text)
* ~~WhatsApp (text)~~
* ~~Signal (text)~~
* Notes (multi-line text, no rich text)
* MRE ID (text)
* ORCID (text)
* Attachments (file)
* Publication Topics (multi-select term store)
* Contact Type (single-select choice)
	+ Staff, Partner, Vendor, Donor, Customer, Competitor
* Center Member (yes/no - default to no)
* Center Membership Join Date (date)
* Referral Source (text)
* Primary Investigator (yes/no, default to no)
* Study Team Member (yes/no, default to no)
* Has Received Services (yes/no - default no)
* Last Service Date (date)
* Has Attended Events (yes/no - default no)
* Last Event Attendance Date (date)
* Group Member (yes/no - default no)
* Primary Team Engagement (lookup to Teams list)
* Active (yes/no, default to yes)
 |  |  |
| **Teams** | MCommunity API - group membershipPeople List | **“Teams” List*** Team Name (text)
* Description (text)
* Team Leader (lookup to People list - optional)
* Team Members (hyperlink) - link to specific view in Team Members list
* Team Drive (hyperlink)
* Team Web Page (hyperlink)
* Slack (hyperlink)
* Teams Account (people field of type Group only, optional – meant to link to an MS Team)
* GitHub (hyperlink)
* Team Calendar (hyperlink)
* MCommunity Group (text) - save as text but format as hyperlink to MCommunity
* Notes (multi-line text, no rich text)
* Active (yes/no, default to yes)

**“Team Members” List*** UniqName (text) - rename default Title field
* Name (lookup to People list)
* Job Title (secondary lookup to People list)
* Email (secondary lookup to People list)
* Teams Account (people field, not required)
* Primary Team (single-select lookup to Teams list, required)
* Other Teams (multi-select lookup to Teams list, optional)
* Primary Role (single-select choice, required)
	+ Center Leadership
	+ Center Administration
	+ Faculty Lead
	+ Core/Team Leader
	+ Project Manager
* Notes (multi-line text, no rich text)
* Active (yes/no, default to yes)
 |  |  |
| **Groups** | MCommunity API - group membershipPeople List | **“Groups” List*** Same fields as “Teams” list, but call them “Group” instead of “Team”
* Group Leader should be a lookup to People list (and be optional)

**“Group Members” List*** Group Name (lookup to Groups list)
* UniqName (text) - rename default Title field
* Name (lookup to People list)
* Notes (multi-line text, no rich text)
* Active (yes/no, default to yes)
 |  |  |
| **Services**1. Consultations
	1. MTC Core
	2. RIC Core
	3. D&D Core
2. Mental Health Assessment - D&D
3. Study Support - MTC
4. Grant writing - RIC
5. Publications - RIC
6. Awards (funding) - RIC
7. Incubator Cohort Members - D&D
 |  |  | How many interactions?* by Core
* Total
 |  |
| **Event attendance** (All center events)1. DOCC
2. MDEN
3. MCN
4. DIGIT-MI
5. Workplace Mental Health
6. Psych Tank
7. Member Engagement events
8. Bright Nights
9. Peer to Peer
10. CMW Wellness Groups
 |  |  | Track after event video views for recorded events.Internal event metrics* # of attendees
* # of departments
* # of schools
 | Need ability to add new events either by type of specific. |
| **Referrals**1. To whom* 1. D&D
	2. RIC
	3. MTC
	4. Membership
	5. External Partner

2. Notes field* 1. What is the referral for? [Examples](https://docs.google.com/document/d/1MrPIJIiKelkHLNILXxMPGTrraXgsgzsg/edit?usp=sharing&ouid=103174479617035179924&rtpof=true&sd=true)

3. Ideally, trigger email to referral  |  |  |  |  |
| **Engagement History**1. Services Received2. Event attendance3. Grant letter of support 3. For each type of engagement* 1. Date
	2. Notes
	3. attachments (letter of support)
 |  |  |  |  |
| **Speaker’s Bureau**1. Name (linked to People list)
2. Topics - taxonomy
3. Internal speaker (MDEN / Symposium)
4. External speaker (community)
5. Earned media?
 | Taxonomy | Term Catalog:?Lists:Speakers* Name (rename Title column to this)
* Contact Info (lookup field to People table)
* Topics (from term catalog)
* Audience Type (single-choice: Internal, External; default to Internal)
* Audience Categories (multi-choice: Middle School Students, High School Students, College Students, Medical School Students, IT Professionals, Scientists and Researchers, School Administrators, Other; default to Other)
* Primary Team Contact (single-select lookup to Teams list, required)
* Notes (long text, but no rich text)
* Rating (enable star ratings in list settings)
 | List of speakers by topicHow many times they have presented on that topicList of speakers by team (from primary team contact field) |  |
| **Speaker History**EventDateSpeaker (lookup to Speakers list)Rating (enable star ratings in List settings) Event Link |  | Lists:Speaker History* Event (rename Title column)
* Date
* Speaker (lookup field to Speakers list)
* Rating (enable star ratings in List settings)
* Event Link (hyperlink)
* Post-event survey results (attachment)
* Slide deck (attachment)
* Video recording (hyperlink)
* Topic (term store)
* Group Presented For (lookup to Groups list)
* Team Presented For (lookup to Teams list)
 |  |  |

| Contact Type | Definition |
| --- | --- |
| Faculty |  |
| Learner |  |
| Study Coordinator |  |
| Data Analyst |  |
| EFDC Staff |  |
| U-M Partner |  |
| U-M Service Provider |  |
| Vendor (external) |  |
| Community Partner |  |

| Group | Definition | Link to current group list OR MCommunity name |
| --- | --- | --- |
| Executive Committee |  |  |
| Center Member |  |  |
| LINC |  |  |
| Incubatees |  |  |
| Peer to Peer |  |  |
| DOCC Planning Team |  |  |
| Workplace Mental Health Planning Team |  |  |
| CMW Wellness Groups |  |  |
| MeTRIC |  |  |
| MDEN |  |  |
| DIGIT-MI |  |  |
| MCN |  |  |