Overview of Tailoring Technology

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Session agenda

- Review of the technical track goals & schedule
- Introduction to the CHCR Technical team
- Participant introductions & goals
- Evolution of tailoring at CHCR
- Design goals for the Michigan Tailoring System
- MTS Architecture
- How does MTS fit into an intervention?
- Homework
Technical Track Goals – Our hopes for you

- Teams of three will build a small project – demos on Friday morning!
- Understand how the Michigan Tailoring System works
  - Architecture
  - Installation
  - Usage
  - Integration
- Evaluate MTS – will it work in your organization? We want your feedback!
- Provide support to your content developers
  - Practice providing support during the open work sessions
- Contribute improvements for the Engine and Workbench software to the community

Tech Track breakout sessions – Today & tomorrow

- Monday
  - 10:45 am – 12 noon: Overview of Tailoring Technology
  - 1:00 pm – 2:30 pm: Intro to MTS Messages
- Tuesday
  - 9:30 am – 10:30 am: How the MTS Engine Works
  - 10:45 am – 12:00 noon: How to install the MTS Engine
  - 1:00 pm – 2:15 pm: MTS Engine Source code tour
  - 2:30 pm – 3:30 pm: MTS Engine Works Q&A and Logic Case Studies
Technical Track breakouts – Wednesday & Thursday

- Wednesday
  - 9:30 am – 10:45 am: Integration with Your Projects
  - 11:00 am – 12 noon: Integration Case Studies
  - 1:00 pm – 2:15 pm: Integration Q&A and Workbench source code tour

- Thursday – all sessions are joint
  - 9:30 am – 10:30 am: Testing
  - 10:45 am – 12:00 noon: MTS Software Demonstration – Preview
  - 12:15 pm – 1:30 pm: Creating an Open Source Community

Participant introductions

- Your name and organization
- What kinds of interventions do you build? (print, web site, mobile device, etc?)
- Programming experience and programming language of choice
- Goals for your workplace
CHCR Technical team

Technical team
- Ian Jones
- Jake Fisher
- Dennis O'Reilly
- Mike Nowak
- Trevor Cortez
- Andrew Sardone
- Carrick Rogers

Creative design
- Ian Moore
- Al Bliss

Sessions you will be teaching
Components you developed
Tailoring experience
Preferred language & operating system

How we tailor
- User and derived characteristics
- Text and graphic messages
- Selection – not an inference engine

University of Michigan Tailoring Workshop
Tailoring before Michigan Tailoring System

- GroverTalk – 1996 to 2004
  - Built from Perl, C++, AppleScript and Quark Xpress
  - Messages: simple text files with indentation
  - Print tailoring

- Survey engine – 1998 to the present
  - NewtonScript, Java applet and finally WebObjects (Java) implementation
  - Messages: XML format designed for surveys

Evolution of Michigan Tailoring System

- Goals of the first generation engine
  - Emphasize selection rules
  - Make it easy to install on many platforms
  - Make it easy to integrate
  - Rapid turnaround for authors

- First generation tailoring engine – 2003 to present
  - Python and a variety of libraries
  - Messages: HTML table format
  - Substitution features
  - Two versions used for MENU (n=2500), Project Quit Phase 1 (n=1600) and 2 (n=1800), Eat for Life (n=1000), MPOWER, Stepping Up To Health
Design goals for the Michigan Tailoring System (MTS)

- Goals of the MTS design
  - Use the experience gained from the first generation engine
  - Improve tool integration and maturity
  - Make authoring and testing easier with integrated Workbench
  - Make content developers more independent
  - Develop tailoring standards

MTS Architecture
How does MTS fit into an intervention?

- Data management
- Data collection
- Tailoring
- Integration
- Layout
Homework

- Install MTS Workbench
- Review Python and expression syntax
  - diveintopython.org
  - Python tutorial at python.org
  - See chcr.umich.edu/mts for more.