
Telesis

**RWBC Regional Workbench Web Site
Project Vision**

Issue 3.1 - Draft

Revision Date: August 1, 2002

**Prepared by
Garth Andrews**

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Revision History

| Date | Issue | Description | Author |
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| 04/26/2001 | 1.0 | First Draft | Rebecca Bergholtz |
| 05/21/2001 | 2.0 | <p>Added comments of Richard Marciano and Ilya Zaslavsky (meeting 5/18/2001).</p> <p>4.1 updated to provide additional detail about the objective of Phase I, including examples of other workbenches</p> <p>Updated 4.1.4 to reflect some questions about project artifacts and workflow.</p> <p>Updated 4.1.5 to include the idea of allowing users to add questions/comments to student documents</p> <p>Updated 4.1.7 to include some of the perspectives for searching, plus other comments from Richard/Ilya in the issues section.</p> <p>Updated 4.3.1 to include thoughts about integrating across other RWBCs.</p> | Rebecca Bergholtz |

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| 06/142001 | 3.0 | <p>Updated document based on final interview with Keith Pezzoli. Removed blue highlights except in cases of unresolved issues.</p> <p>Added 3.4 to provide background about the student process.</p> <p>Reorganized all of section 4.1 to include more detailed information. Highlighted changes:</p> <p>4.1.2—provided additional detail about the public vs. private sections of the site</p> <p>4.1.3—provided information about the workflow of project/topic submission</p> <p>4.1.4, 4.1.6, 4.1.7, 4.1.8, and 4.1.12—added new section based on interview with K. Pezzoli on 6/12/01</p> <p>4.1.5, 4.1.13, and 4.1.16—added new section based on ideas of R. Marciano/I. Zaslavsky, then validated with K. Pezzoli on 6/12/01</p> <p>4.1.9, 4.1.10 and 4.1.11—added additional information based on interview with K. Pezzoli on 6/12/01</p> <p>4.1.14—added information to the internal section of the site</p> <p>4.1.15—refined this section and all sub-sections based on interview with K. Pezzoli on 6/12/01</p> <p>4.1.17—refined this section based on interview with K. Pezzoli on 6/12/01</p> <p>4.1.18—added new section based on interview with K. Pezzoli on 6/12/01</p> | Rebecca Bergholtz |
| 7/20 | 3.1 | Updated to reflect increased scope of the RWBC Project | Garth Andrews |
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Regional Workbench Web Site Project Vision

1. Introduction

The purpose of this document is to refine the high-level needs and features of the Regional Workbench Web Site. It focuses on the expanded capabilities needed by the additional stakeholders and the target users, and why these needs exist.

1.1 Purpose

The purpose of this Vision document is to provide a high-level view of the Regional Workbench Web Site by answering the following fundamental questions:

- What problems/needs does the system address?
- Who is most likely to be affected by the system?
- What business entities are included in the system?

This Vision document will capture very high-level requirements and design constraints in order to provide an understanding of the system to be developed. We will collect, analyze and define high-level needs of the system's stakeholders and future users.

This document will provide the gauge against which all future decisions related to the implementation of this project should be evaluated. The details of how the Regional Workbench Web Site fulfills these needs will be detailed in the Vision document and requirements specifications.

1.2 Scope

The scope of this document is to provide a high level framework of requirements for the web site development. This document outlines the high-level features required of the site and focuses on capabilities needed by the target users and *why* these needs exist.

This document only applies to the features and functionalities needed for the Regional Workbench Web Site. Part of the scope definition will include a discussion to define the geographic boundaries that will initially be served by the Regional Workbench Web Site. To date, these boundaries have included the greater San Diego area and the northern border areas of Mexico that have trans-border relationships with the San Diego area. This will also include the coastal area of both areas.

1.3 References

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2. Overview of the site's key needs

The Regional Workbench is envisioned as a centralized regional aggregator of information that will allow it users to integrate research, technological development and other efforts aimed at improving quality of life in the Southern California-Northern Baja California transborder region--especially the San Diego-Tijuana city-region and coastal zone.

The RWBC is anticipated to become a centralized resource center that researchers, students, and anyone involved in the study of sustainable life sciences could utilize.

The notion of the workbench is of a site that is actively used for discovery within a discipline. The workbench will be an interactive site that enables a user to conduct research against existing knowledge, while building upon that knowledge and publishing his/her own work.

The RWBC will possess the following characteristics:

- Geographic imaging based architecture
- The ability to search for data and relationships
- Computation using internal/external resources
- Joining of complex repositories
- Uploading and displaying of completed research

From the Proposal Submitted to the UCSD Civic Collaborative are the following objectives:

- Conceptual organization of a multifaceted Web site, given its multiple audiences: researchers, students, industry, community groups, general public;
- Integrative research linking discipline specific knowledge from environmental science, planning, urban economics, urban politics and law, to allow integrating data, information and knowledge across domains through the use of searchable "topic maps";
- Adaptable web interfaces, to present content oriented perspectives useful to researchers, students, industry partners, etc.
- Discovery of web-based tools ("workbenches" and "portals") appropriate for online regional research, education, training and outreach;
- Cataloguing and consistently describing the available resources of regional information, and developing navigation and presentation aids for these resources;
- Networking with partner sites (other regions building regional information and knowledge networking systems for research and education, other regionally-focused sites in San Diego and UCSD regionally-focused projects).

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Seven fundamental precepts guiding the RWBC project :

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| Place-based, scalable | <ul style="list-style-type: none"> Facilitate multidisciplinary place-based research in a scalable context (i.e., a conceptual space that interrelates local, regional and global dynamics). |
| Integrative, multidisciplinary | <ul style="list-style-type: none"> Link the “new regionalism” with sustainability science and advances in information and communications technologies. Create methods for integrating physical, biological and socioeconomic data (including the ability to do cross-border integrated risk assessment). |
| Normative | <ul style="list-style-type: none"> Promote the three E’s of sustainable development (equity, environmental stewardship, and economic efficiency) in a whole-systems approach. |
| Problem-driven, action oriented | <ul style="list-style-type: none"> Pursue a core set of pressing problems (projects) that inspire the linkage of knowledge to action at the regional scale. |
| Collaborative and multicultural | <ul style="list-style-type: none"> Foster relationships and networks driving the shift from “planning for the public” to “planning with the public.” Serve as a culturally sensitive platform for education, outreach and training. |
| Historical and Forward-looking | <ul style="list-style-type: none"> Seek historically-informed views of alternative futures (i.e., actionable “Vision” based on critical understanding and current knowledge of relevant literature). |
| Accessible, user-friendly, network extensible | <ul style="list-style-type: none"> Build capacity for data and information sharing (based on principles of distributed intelligence and federation). Create story-based narratives and multi-media presentations that offer meaningful views of the RWBC’s projects (tailored to distinct audiences including researchers, public agencies, community groups, and students). |

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3. Positioning

3.1 Opportunity

The proposed enhancements will create a new centralized mechanism that will allow the integration of existing data and partners for the purpose of performing, research, accessing existing studies, and sharing of data with the outside world as part of a larger network.

3.2 Problem Statement

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| The problem of | Collecting new data, accessing existing research, collaborating on projects |
| affects | Students, Faculty, Partners, Research Groups |
| The impact of which is | Difficulty in sharing and using knowledge |
| A successful solution would | Provide a centralized mechanism for collaborative research, communication, sharing, and referencing of existing data. |

3.3 Key Users

The following is a preliminary list of the key partners involved in the redefinition of the RWBC project.

3.3.1 *Regional Workbench Consortium Partners*

Students

Faculty

Researchers

University Partners

UCSD

- Superfund Basic Research Program
- Urban Studies and Planning Program
- Civic Collaborative
- San Diego Supercomputer Center (Knowledge-based Integration Lab, Spatial Information Laboratory)
- Center for U.S.-Mexican Studies
- Center for Comparative Immigration Studies
- Scripps Institution of Oceanography (Geological Data Center, Institute of Geophysics and Planetary Physics)
- Cal-(IT)2

SDSU

- Graduate Program in City Planning, School of Public Administration and Urban Studies
- Departments of Geological Sciences, and Geography
- Southwest Center for Environmental Research and Policy (SCERP)

Mexico

- COLEF (El Colegio de la Frontera Norte)
- CICESE (Centro de Investigación Científica y de Educación Superior de Ensenada/ Center for Scientific Investigation and Graduate Education, Ensenada)
- UABC (Universidad Autónoma de Baja California)

Non-profit organizations

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- TELESIS
- Planeficacion, A.C.

Government Agencies

- INFORMATICA (A Municipal GIS Institute of Tijuana)
- SANDAG
- County of San Diego
- San Diego Regional Water Quality Control Board

Industry

- Asociacion Industrial Maquiladora
- Industrial Environmental Association

User Descriptions

The following table provides information about the users of the RWBC Web Site, who they represent, and their role in relation to the system.

| Name | Description | Role |
|--------------------|--|--|
| Students | Student researchers at UCSD | Posts projects and research to the RWBC |
| Faculty | Professors who facilitate student research | Communicates with students and other faculty members |
| Partners | Entities who wish to have research conducted on real-life projects | Provides input as to the projects that will be researched on the RWBC |
| Outside World | Other similar regional research entities | The larger network that RWBC will be linked to in the future |
| Other Users | Government Agencies, Industry, Community Organizations, etc | End users of the research available at RWBC—generally, anyone interested in data about the San Diego/Tijuana region. |
| RWBC Administrator | Administrator of the site | Gatekeeper for information—ensures proper content is posted, creates/maintains user accounts, updates site content. |

3.5 User Environment

While some users (mainly Students, Faculty, and the RWBC Administrator) will access the system from within university buildings, Partners and other regional research entities will access the system over the Internet.

Users will be expected to be technically proficient enough to user a browser and basic graphical user interfaces.

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4. Key User Needs

The following section will attempt to define the key user needs by objectives, by RWBC Project and by discipline. It is important to understand that the RWBC is multidimensional and that we must look at all attributes in order to accurately size the effort, mitigate risk and plan out the phases.

4.1 Creation & Management of Knowledge

Phase I involves the creation of knowledge for all users. In this phase, the key objective is to facilitate creation of knowledge and sharing and management of this intellectual capital among the stakeholders. By linking all projects together based upon their related attributes, the body of knowledge within the workbench will grow over time.

4.1.1 *Provide a Working Site for Research*

Users will be able to research, work on, and upload projects into protected work areas that will allow them to immerse themselves and their projects into the vast knowledgebase of the RWBC and draw upon its resources. There will be well defined domains from which they will able pick and choose how their project will interact with the RWBC.

4.1.2 *Restricting Access*

The RWBC will have a public area, which will include selected completed projects and general information about the RWBC, along with a secured area for current research.

Access to restricted areas will only be to students, faculty, researchers, trusted partners, and the RWBC Administrator. This access will be through a login screen, which requests a user ID and password.

4.1.3 *Integration of Data into the RWBC*

There will be instances where outside partners will provide projects, which will be presented as a question to be investigated over several years. These partners will be set up as projects in the RWBC

Each project will be evaluated to ensure that they are in keeping with the RWBC mission. Keith will be the gatekeeper for project additions.

Although topics and projects are undefined at present, the system must allow flexible administration to add/delete topics and projects. Some likely topics include:

- Environmental
- Community Development, Health, and Safety
- Physical Planning and Design
- Economic Development
- Laws and Regulations, Political Culture

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4.1.4 *Project Topic Data Entry*

As users enter new projects into the system, they will have the ability to access the wealth of information that already exists within the RWBC. They will have the ability to choose how their project interacts with the multidimensional, views of the existing data. The user will need to satisfy required attributes for all data that is loaded to the RWBC. All works in progress will be exempt from this requirement until such a time that their projects and data have been verified and subsequently promoted from a pending status.

4.1.5 *Ontology and XML*

Being able to categorize, link, group, and search for artifacts based on a defined ontology is critical. Thus, the RWBC will mine existing projects and similar domains to define project ontology. This will be used to create a list of keywords for topics, projects, and project artifacts.

These keywords will be used to tag topics, projects, and artifacts with XML. Wherever keywords are selected, automated XML tagging will be completed. This tagging will facilitate the categorizing, linking, grouping, and searching that is so critical to the knowledge building that is at the heart of the Regional Workbench.

Wherever this list of keywords is provided for users to tag artifacts, it will be provided in a selection box to prevent users from misspellings, incorrect entries, etc.

4.1.6 *Managing Users*

The RWBC Administrator will add users after they have completed the necessary user information. The site will have public areas for completed projects that have been deemed fit for publication, but areas of the site involving research within a given annual cycle will be restricted to the students, instructors, researchers, partners, and the RWBC administrator.

4.1.7 *Managing Projects & Artifacts*

The system will have the ability to manage all artifacts, data, and projects in the RWBC. It will be the job of the administrators to ensure that there is adequate control over what is promoted to the public site. The RWBC will only be as good as the data and projects that it presents..

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4.1.8 *Creating Projects Online*

Users will be able to view the various discipline areas, existing projects, and predetermined project templates. Within each discipline will be projects to be provided by partners, faculty, and researchers.

All project information entered in 4.1.4 will be displayed to the user, including the project description, links, completed work, associated projects, etc.

Users can select the desired project, and will complete a form about their proposed approach which will then be forwarded to the RWBC Administrator for review:

Once a project has been approved, the RWBC Administrator will convert the request to an active project.

4.1.9 *Linking Projects*

Once a project has been converted from a request to an active project, the user will add keywords from the keyword list. The keywords will automatically tag the project with XML.

The keywords will then be used to search for similar projects. The user will have the option to link any similar projects to the new project.

4.1.10 *Ability to Post Work on RWBC*

Once a user has completed a body of work that can be posted to the RWBC, it will need to be submitted to the administrator for promotion to the site.

4.1.11 *Adding Links to Projects and Sources*

Users will be able to add links to the RWBC. These links may include data sources, work in a related domain, or any other work related to the domain. These links will be project specific.

These will be added by completing a form with the link information and keywords from the keyword list. The keywords will automatically tag the link with XML. The request to add the link will then be forwarded to the RWBC Administrator for review.

After validation by the RWBC Administrator, the link will be added to the RWBC.

4.1.12 *Users Will Be Able to Comment in Shared Space*

The RWBC should provide the ability for users to share thoughts/questions about the work of others in a shared space. Rather than offering a bulletin board (which is generally very disconnected from the individual document at hand), this is envisioned as enabling users to post questions within a document using a docushare tool.

Although this will not be active for the first iteration, the team hopes to offer this functionality in a subsequent release.

4.1.13 *Search Data from Multiple Perspectives*

The RWBC must provide the ability for data to be approached from various perspectives to enable users to find information according to their particular needs. In addition to enabling users to find projects and topics, the RWBC must help users locate data sources and prior research effectively.

This will involve a visually oriented search as well as a more conventional search tool.

Both methods need to provide the following qualities:

- Be visually consistent
- Avoid producing long lists of unprioritized links / information
- Show context
- Show density of prior viewing
- Show magnitude of relevance/importance to search subject
- Allow for alternate methods of searching

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Thus, presenting information based on order of magnitude and relevance to the criteria requested is essential.

Also, any individual topic or project shown will include all related information, including associated projects, links, data sources, etc.

4.1.13.2 Visual Searching

The RWBC team has reviewed a number of different visual metaphors. Most critical is the idea to use a tool that allows the user to approach from different perspectives and provides options for narrowing the search area.

Although a specific metaphor has not yet been determined, the following are under review:

- A round, three-dimensional pie like that of the GSSD site (this particular one is copyrighted, but something similar could be done)
- A topographical approach, such as WebMap, which offers density and order of magnitude information
- Venn-like diagrams, which enable users to see divisions within domains and intersections with other areas

4.1.13.3 Search Tool

A second method would allow users to search based on criteria. This would involve making selections by filling in boxes or choosing from drop-down boxes like a conventional search engine.

The Search Tool will involve the following criteria for searching:

- Name
- Geographic Location
- Status
- Domain of Knowledge
- Student/Faculty/Industry/Government
- Links to Sites
- Date
- Policy Implication
- Collaboration
- Research methods and parent of method
- Keywords

The search will go through all of the items tagged with XML in order to bring back relevant items as well as items linked to them.

Results of the conventional search will be displayed in a list based on relevance. Best examples of projects as described in 4.1.17, will also be distinguished in the list of results and balanced with the means of displaying order of magnitude for this search.

4.1.14 *Experimental Areas for Research of RWBC Methodology*

Best practices and knowledge are continually emerging within the domains of the RWBC, including new ways to organize and navigate through data, there will also be an experimental area to enable users to research further ways to enhance the RWBC itself.

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This area would enable users to explore new navigation ideas or theories as the technology changes.

4.1.16 *Archiving of Projects*

The RWBC will need to have the capability to archive projects. Once archived, the projects can be recalled at any time.

4.1.17 *Piloting Domains for the First Iteration*

Part of the challenge of building a data repository involves creation of the initial data.

In addition to mining for the Keywords that will be the backbone of data handling, the most critical tasks for the first iteration involve the generation of topic maps for selected domains. These will then be used to detail the visual metaphor and to provide a starting point for research.

Some of the information to be provided would include links to data sources and completed work, background on the domain, etc.

For the first iteration, Keith Pezzoli suggested beginning with the following domains and domain experts to develop the topic maps:

- Industrial Ecology—Keith Pezzoli
 - Planning/Support Tools—Richard Marciano
 - Urban Geography—Ilya Zaslavsky
 - Others as identified and available
- A sliver of the Quality of Life Domain, in conjunction with a partner, could also be included in the first iteration.

4.2 **Non-functional Requirements**

4.2.1 *One-click Navigation*

Navigation through topics must be contextual and quick, down to one click if possible (spiral metaphor).

4.2.2 *UCSD Guidelines*

The site must follow UCSD guidelines.

4.2.3 *Scalable Branding and Information Architecture*

Logo/branding and information architecture must accommodate growth over time.

4.2.4 *Accessibility*

The RWBC must be accessible to non-sighted or other disabled visitors.

4.2.5 *Language*

Although not in the first iteration of Phase I, the site must eventually be bi-lingual (Spanish).

4.2.6 *Browser*

The site should be compatible with Microsoft Explorer version 4.0 and Netscape 4.0.

4.2.7 *Hosting*

All hosting is provided by the Supercomputer Center.

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4.2.8 *Site Administration*

Interns and staff will provide site administration.

5. **Tasks & Deliverables**

The following is the list of activities that will need to be completed in order to realize the vision of the RWBC. Given the complexity of the project, it is imperative that we approach it in a methodical well planned out approach.

5.1 **Phase I**

The following are tasks for Phase I. Once the list has been approved we can develop a timeline for the completion of these tasks

- Refine the Vision Document
- Define the key Stakeholder needs
- Develop the Use Cases
- Develop System Requirements
- Design a preliminary architecture with visual mapping as the underlying infrastructure
- Design data architecture and preliminary attributes
- Designate Pilot Projects
- Establish core project team
- Define Development Plan

5.2 **Phase II**

The following are some of the activities for Phase II of the RWBC project. As Phase I becomes more clearly defined, we can better understand what is required and establish timelines.

- Define system requirements
- Establish common data architecture
- Develop centralized metadata repository
- Develop core site

5.3 **Phase III**

Phase III will be dedicated to integrating data and implementing the pilot projects.

- Integrate pilot projects
- Integrate limited partner data
- Create data links between projects
- Deploy