



UMass Portal Strategy Discovery Report

Best Practices Analysis

February 26, 2004

Version 1.1

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Analysis Overview

- ▶ The goals of the Best Practices Analysis are to
 - Identify and profile leading university portal offerings in terms of features and functionality
 - Provide a high level comparison of UMass offerings in light of peer offerings
 - Identify best practices for portal development and their implications for UMass

Portals in Higher Education

- ▶ To set the context for this analysis it is important to understand how portals are being used within higher education.

- ▶ As in other vertical business segments, portal solutions are becoming a part of higher education institutions' strategic enterprise infrastructure.

- ▶ Current state of the art portals in higher education deliver consolidated web-based information services.
 - The portal serves as a framework providing
 - A single, or unified, access point to information systems and applications
 - Aggregation of information and data across multiple, disparate resources
 - A web-based interface for viewing and accessing content and data
 - Personalized content, information, and functionality to different university constituencies
 - Improved communication and collaboration within and across different constituent groups

 - Portal offerings serve one or more of the following constituencies
 - Students, Faculty, and Staff
 - With the opportunity to expand to reach Alumni, Prospective Students, Parents, and other university affiliates and partners

Portal Functionality Comparison: Approach

- ▶ The Functionality Comparison examines functionality that is most frequently delivered, or planned for delivery, within university portal offerings and the robustness of that functionality within the given portals.







- ▶ Ratings Approach
 - The Analysis rates university portal offerings on the following scale:
 - Very strong/robust offering – Marketplace leader, core strength
 - ◐ Complete offering – Strong functionality but missing one or two elements
 - ◑ Average offering – Basic features/functionality are available
 - ◒ Minimal offering – Bare minimum functionality offered or functionality only in the planning stages
 - No offering – No offering and no apparent plan for future offering

 - Note that the ratings are subjective and based on the following inputs:
 - General publication/research information
 - Review of sites, site documentation, etc.

Portal Functionality Comparison: Overview

- ▶ The table below contains an overview of different university approaches to portal.

Note that additional detail on selected portals is available in the Appendix.

Indiana University	University of Texas – Austin	University of North Carolina – Chapel Hill	University of Wisconsin – Madison	Northeastern University	University of Washington
					
<ul style="list-style-type: none"> ▶ 8 campuses ▶ Unique in taking a unified, system-wide view of the university and its campuses ▶ OneStart is a personalized portal for all university constituents across all campuses ▶ OneStart was launched in late 2001 ▶ Public web sites are extensive, well organized directories of resource links 	<ul style="list-style-type: none"> ▶ 9 academic campuses and 6 health institutions ▶ Personalized portal, UT Direct, available at Austin campus ▶ UT Direct was launched in late 2000 ▶ Different personalized portal, My UTEP, available at El Paso campus ▶ System web site provides system level constituent information and links to individual campus resources 	<ul style="list-style-type: none"> ▶ 16 campuses ▶ Only UNC Chapel Hill has a personalized portal presence with My UNC ▶ My UNC was launched in 2002 ▶ A key aspect of My UNC was to consolidate access to existing applications ▶ No cross reference links from one campus web site to another 	<ul style="list-style-type: none"> ▶ 13 four year campuses ▶ Only Madison campus has a personalized portal presence with My UW Madison ▶ My UW Madison was launched in 2001 ▶ Some general constituent content presented on the system web site ▶ No consistency of web presence from one campus to the next 	<ul style="list-style-type: none"> ▶ MyNEU is portal geared towards students ▶ Provides electronic access to a variety of academic record and financial services on the Web ▶ MyNEU was launched in fall of 2002 ▶ Portal platform is Campus Pipeline 	<ul style="list-style-type: none"> ▶ MyUW is a personal portal for University of Washington information. ▶ Initial general release of MyUW was in early 2000 ▶ Developed and maintained by UW Computing & Communications staff. ▶ Portal platform is a custom Java application running on Apache

Leading Portal Offerings: General Functionality



		Indiana University	University of Texas Austin	University of North Carolina Chapel Hill	University of Wisconsin Madison	Northeastern University	University of Washington
Application Integration	▶ Aggregation of content from multiple backend systems for display within the portal						
Personalization	▶ Content and functionality based on user role(s)						
Customization	▶ User can customize the content and its layout						
Unified Access	▶ Single or facilitated sign on to multiple systems						
Tools	▶ Access to email, personal calendars, etc.						
Alerts	▶ Information "pushed" to the user on a near real-time basis						
Search	▶ Consolidated search across multiple university sites and data sources						
Collaboration	▶ Document sharing, threaded discussion, etc.						
Channel Information	▶ Content from outside data sources (e.g. news, weather, etc.)						
Library	▶ Access to online library services such as catalog search and electronic reserves						

Leading Portal Offerings: Student Functionality



		Indiana University	University of Texas Austin	University of North Carolina Chapel Hill	University of Wisconsin Madison	Northeastern University	University of Washington
Academic Records	▶ Ability to review grades, transcripts, degree progress, etc.	●	◐	●	●	◐	◐
Course Registration	▶ Online course registration and schedule information	●	◐	●	●	○	◐
Financial Records	▶ Review university balances and fees	◐	◐	●	●	◐	◐
Financial Aid	▶ Online application, review status and history	◐	◐	◐	◐	◐	◐
Student Life	▶ University news, events, policies, etc.	◐	◐	◐	◐	◐	◐
Student Profile	▶ Manage contact and other personal information	○	○	◐	●	○	◐
Course Tools	▶ Online tools for courses, student portfolio, etc.	○	◐	◐	◐	◐	◐
E-business	▶ Online payments for university accounts including tuition, campus cards, housing, bookstore, etc.	◐	○	◐	◐	○	○
Housing	▶ Apply for and review housing status	○	○	◐	◐	◐	◐
Admissions	▶ Online application within portal context	◐	◐	○	○	○	○

Leading Portal Offerings: Faculty Functionality



		Indiana University	University of Texas Austin	University of North Carolina Chapel Hill	University of Wisconsin Madison	Northeastern University	University of Washington
Academics	▶ Ability to submit grades online						
Course Schedule	▶ Online course schedule information						
Course Tools	▶ Online course tools access and use						
Campus Life	▶ University news, events, policies, etc.						
Advisor Resources	▶ Online access to advisee records, degree progress, etc.						
Finances	▶ Access to procurement, budget authorization, expense reimbursement, etc.						
HR and Benefits	▶ Manage personal records and benefits						
Departmental Resources	▶ Access to departmental news, systems, etc.						

Leading Portal Offerings: Staff Functionality



		Indiana University	University of Texas Austin	University of North Carolina Chapel Hill	University of Wisconsin Madison	Northeastern University	University of Washington
Content Management	▶ Ability to create, edit and publish content (e.g. news, policies) online	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Campus Life	▶ University news, events, policies, etc.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Finances	▶ Access to procurement, budget authorization, expense reimbursement, etc.	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
HR and Benefits	▶ Manage personal records and benefits	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Office Resources	▶ Access to office news, systems, etc.	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>











UMass Web Presence

- ▶ While no UMass campus currently offers a portal comparable to those profiled in this analysis, the different campuses do offer a variety of web based applications with “portal like” functionality.

- ▶ This section provides an overview of the current web offerings and a high level assessment of how these offerings align with typical portal functionality.
 - The analysis takes into account current web functionality as well as initiatives that are scheduled to complete within the next 12 months.





 - Scoring is
 - Based on how well the web offering aligns with enterprise portal functionality.
 - Relative given lack of any enterprise portal at either the campus or system level.
 - Accounts for active initiatives scheduled to rollout this year (2004).

UMass Web Presence: Overview






Campus	Strength of User Experience	Overview of User Experience
		<ul style="list-style-type: none"> ▶ High degree of student web-based self service provided via Spire. Especially strong in providing access to academic records, course registration, and financial balances. Note that Spire implements the PeopleSoft Portal product. ▶ No aggregation of content in a single location, single sign on, or planned integration across initiatives. ▶ New campus web site with portal like layout launching in 2004.
		<ul style="list-style-type: none"> ▶ Student web self service via PeopleSoft is in development. ▶ Portal type functionality has been proposed and some stand alone web tools have been developed. ▶ No personalized web experience. All content is targeted to a larger group and consists of static links.
		<ul style="list-style-type: none"> ▶ Portal like layout introduced with aggregation of content (e.g. weather, news, event calendar). ▶ Web self service for academics and finances on legacy system. Being upgraded to PeopleSoft. ▶ No single sign on or access point.
		<ul style="list-style-type: none"> ▶ Portal like layout on "intranet" site with aggregation of content (e.g. weather, news, event calendar). ▶ Student web self service via PeopleSoft is in development. ▶ No single sign on or access point.
		<ul style="list-style-type: none"> ▶ Intranet delivers aggregated content (e.g. weather, alerts, news, event calendar, campus information). ▶ No single sign on or access point.

UMass Web Presence: Overview (continued)








Campus	Strength of User Experience	Overview of User Experience
		<ul style="list-style-type: none"> ▶ Primarily marketing oriented content. ▶ Provides dynamic data in terms of course availability. ▶ No personalization. ▶ Links out to campus sites for detailed course/degree information; no content aggregation.
<p data-bbox="104 549 371 578">President's Office</p> 		<ul style="list-style-type: none"> ▶ Static web site; no apparent dynamic content. ▶ No ability to deliver university-wide content through a campus web interface. ▶ No personalization. ▶ No role based navigation.

UMass Web Presence: General Functionality

		UMass Amherst	UMass Boston	UMass Dartmouth	UMass Lowell	UMass Worcester
						
Application Integration	▶ Aggregation of content from multiple backend systems for display within the portal	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Personalization	▶ Content and functionality based on user role(s)	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Customization	▶ User can customize the content and its layout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unified Access	▶ Single or facilitated sign on to multiple systems	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tools	▶ Access to email, personal calendars, etc.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Alerts	▶ Information “pushed” to the user on a near real-time basis	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
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Note that scoring for each item is based on its functionality in a stand-alone context. In nearly all cases, even strong functionality needs to be accessed individually via its own unique login.

UMass Web Presence: Student Functionality

		UMass Amherst	UMass Boston	UMass Dartmouth	UMass Lowell	UMass Worcester
						
Academic Records	▶ Ability to review grades, transcripts, degree progress, etc.	●	◐	◑	○	◑
Course Registration	▶ Online course registration and schedule information	●	◐	◑	○	◑
Financial Records	▶ Review university balances and fees	◑	◐	◑	○	◑
Financial Aid	▶ Online application, review status and history	◑	◐	◑	◐	○
Student Life	▶ University news, events, policies, etc.	◑	◐	◑	◑	◑
Student Profile	▶ Manage contact and other personal information	◑	○	◑	○	◑
Course Tools	▶ Online tools for courses, student portfolio, etc.	◑	◑	◑	◑	◑
E-business	▶ Online payments for university accounts including tuition, campus cards, housing, bookstore, etc.	○	○	○	○	○
Housing	▶ Apply for and review housing status	◐	N/A	◐	○	N/A
Admissions	▶ Online application	◑	◑	◑	◑	◐






Note that scoring for each item is based on its functionality in a stand-alone context. In nearly all cases, even strong functionality needs to be accessed individually via its own unique login.

UMass Web Presence: Faculty Functionality

		UMass Amherst	UMass Boston	UMass Dartmouth	UMass Lowell	UMass Worcester
						
Academics	▶ Ability to submit grades online					N/A
Course Schedule	▶ Online course schedule information					
Course Tools	▶ Online course tools access and use					
Campus Life	▶ University news, events, policies, etc.					
Advisor Resources	▶ Online access to advisee records, degree progress, etc.					
Finances	▶ Access to procurement, budget authorization, expense reimbursement, etc.					
HR and Benefits	▶ Manage personal records and benefits					
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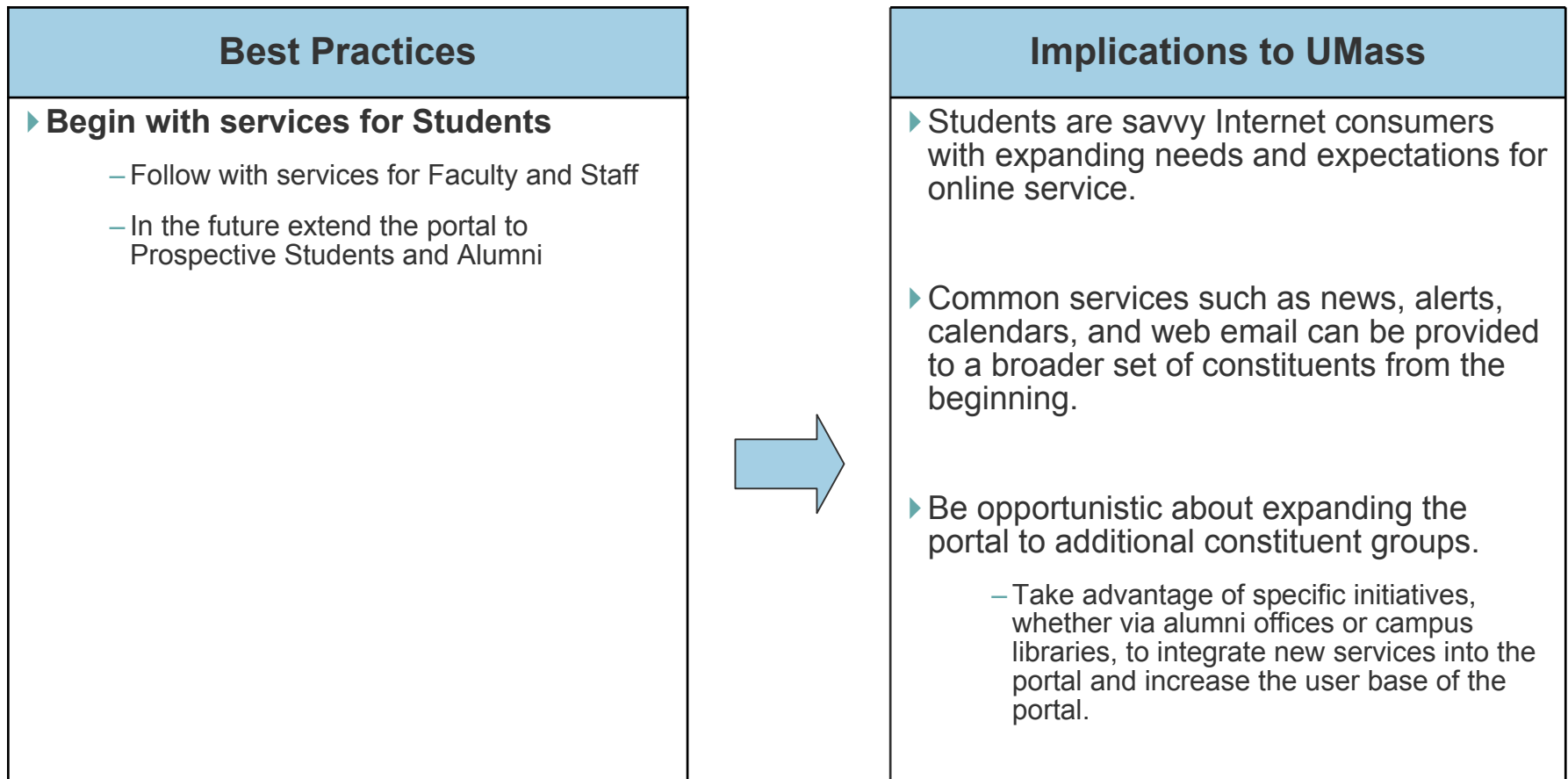
UMass Web Presence: Staff Functionality

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Portal Best Practices

- ▶ This section examines best practices for portal initiatives within higher education.
 - The section format highlights the best practice and its implications for UMass to consider as it defines its portal strategy and implementation plan.



Best Practices

- ▶ **Begin with services for Students**
 - Follow with services for Faculty and Staff
 - In the future extend the portal to Prospective Students and Alumni

Implications to UMass

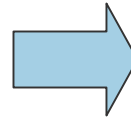
- ▶ Students are savvy Internet consumers with expanding needs and expectations for online service.
- ▶ Common services such as news, alerts, calendars, and web email can be provided to a broader set of constituents from the beginning.
- ▶ Be opportunistic about expanding the portal to additional constituent groups.
 - Take advantage of specific initiatives, whether via alumni offices or campus libraries, to integrate new services into the portal and increase the user base of the portal.

Portal Best Practices (continued)

Best Practices

▶ Develop a Vision and Roadmap

- Outline the long-term objectives and strategy for portals at the university
- The vision should be shared across the university and its various constituents



Implications to UMass

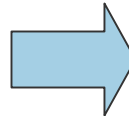
- ▶ Robust portal offerings are complex undertakings involving the integration of business processes and technology infrastructures that are currently disconnected.
 - A portal initiative will of necessity take a significant amount of time to implement.
 - Ongoing change and development will continue in parallel to portal development.
- ▶ An agreed upon vision (i.e. set of goals) is necessary to guide both core and related initiatives over the course of portal development.
 - Ongoing work should be examined to ensure that it will complement and support the portal.

Portal Best Practices (continued)

Best Practices

▶ **Collective Ownership**

- Portal ownership should
 - Span campus offices, departments, and roles
 - Be inter-campus



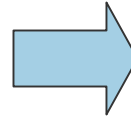
Implications to UMass

- ▶ Portals should positively impact how all university constituents go about their jobs and tasks.
 - To do this, the broad range of constituents need to have input and buy-in to the portal development.
- ▶ Portals require collaboration across different offices, departments, and roles.
 - Diverse representation is necessary in the committee steering the portal initiative.
- ▶ Strong support of campus and system leadership is necessary.
 - Portal development will require the bridging of historic silos in business and technology.
 - Resource (staff and financial) commitments must be maintained.

Portal Best Practices (continued)

Best Practices

- ▶ **Accommodate varying constituent needs**
 - Develop solutions to meet the needs of specific university communities
 - One portal does not have to fit all possible constituent needs



Implications to UMass

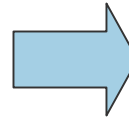
- ▶ One of the key values of a portal infrastructure is the ability to meet the diverse needs of a broad spectrum of users via a common technology infrastructure.
 - The portal solution design and implementation must have this characteristic to achieve both its cost saving and service enhancement potential.
- ▶ Still, the portal scope must be achievable and initial portal goals should not be so broad as to be “all things to all possible people.”

Portal Best Practices (continued)

Best Practices

▶ Communicate with stakeholders

- Practice ongoing communication with constituents to set expectations, promote accomplishments, and provide an avenue for feedback.



Implications to UMass

- ▶ Successful portal development requires a strong communication plan and the commitment of key stakeholders throughout the university.
- ▶ Coalition building and commitment are essential in developing a portal that spans across departments and organizations within the university community.
- ▶ User adoption of the portal is dependant on the portal
 - Meeting the constituent needs and expectations.
 - Evolving in response to user feedback.

Portal Best Practices (continued)

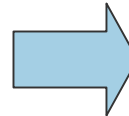
Best Practices

▶ Provide enhancements by leveraging existing investments

- Make use of strengths of the current technology systems

▶ Consolidate “smartly”

- Avoid developing services that duplicate existing functionality



Implications to UMass

▶ A portal should enhance the current systems, not replace them.

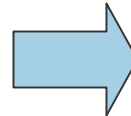
- Use of legacy systems can be improved and extended by improving access and the user experience via the portal.
- “Quick wins” can be achieved for the portal by integrating existing online functionality and providing a single access point.

▶ Use the portal as an opportunity to consolidate services that are duplicated across university offices and departments both at campus and system levels.

- Ongoing support and maintenance can be provided on a more effective and efficient basis.

Portal Best Practices (continued)

Best Practices
<ul style="list-style-type: none"> ▶ Embrace an iterative approach to development <ul style="list-style-type: none"> – The scope and complexity of a robust portal is daunting if all development is attempted in a single phase – Build upon a series of smaller successes ▶ Understand supporting processes, policies, and systems <ul style="list-style-type: none"> – Key areas to examine are security and content management



Implications to UMass
<ul style="list-style-type: none"> ▶ Plan to evolve and extend the portal through iterative releases. <ul style="list-style-type: none"> – Use the Vision and Roadmap to plan and guide the successive phases of development, testing, and rollout. ▶ Don't make any release the "end all, be all." <ul style="list-style-type: none"> – Still, each phase should be providing something of value to the portal users. ▶ Identify and address policy issues with regard to privacy, advertising, E-commerce, and ownership. ▶ Develop a comprehensive content management strategy. <ul style="list-style-type: none"> – It is critical that that information be accurate, up-to-date, and relevant.

Portal Best Practices (continued)

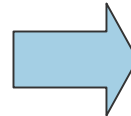
Best Practices

► Understand and define requirements

- Requirements should address business, functional, user, and technology needs and constraints

► Robust portal solutions deliver

- Consolidated web-based information services
- A single login point
- The ability to search for information across multiple, disparate web resources
- Personalized content and information



Implications to UMass

- Interview stakeholders and end users to develop detailed user group definitions and use cases.
- Perform usability tests throughout the development process to ensure that user needs and expectations are being met.
- Define interoperability standards and integration approaches.
- As UMass defines its Vision and Roadmap for a portal it should consider key characteristics of the current leading portal offerings.


Appendix

Appendix

- ▶ University portal profiles
 - Indiana University
 - University of North Carolina – Chapel Hill
 - University of Texas – Austin
 - University of Wisconsin – Madison


- ▶ Research sources

Appendix: Portal Profile – Indiana University

Portal Offering	Vision	Approach	Functional Priorities
<p>Indiana University</p>  <p>https://onestart.iu.edu</p>	<ul style="list-style-type: none"> ▶ “OneStart is a web-based enterprise service delivery framework that provides a unified access point to Indiana University information systems for everyone with business or activities to conduct with IU. OneStart is a user-centered portal, offering a wide array of services with the intent of developing a personalized campus community – a place to study, work, collaborate, and have fun!” ▶ “UITS [University Information Technology Services]], working with the users of IU’s administrative systems, should develop a common interface environment that will support the efficient and effective accomplishment of the day-to-day administrative tasks of the University. UITS should develop a consolidated information delivery environment, leveraging technologies already in use and expanding on these with new tools. <p>This common interface environment should be implemented across all commonly used desktop computing platforms and operating systems.”</p> <p>Promotes system and campus content delivery through the same interface.</p>	<ul style="list-style-type: none"> ▶ A single, unified portal framework for the entire university system and its eight campuses ▶ Developed by IU’s University Information Technology Services ▶ Initial launch in 2001 with ongoing investment in enhancements and revisions ▶ OneStart’s infrastructure is EDEN (Enterprise Development Environment), a custom built framework. <ul style="list-style-type: none"> – J2EE-based – Object-oriented – Reusable standard modules upon which services can be built 	<ul style="list-style-type: none"> ▶ Single sign-on ▶ Role-based customization ▶ Personalization of user’s desktop ▶ Open architecture for easy service integration ▶ Universal access via web browsers ▶ Channel and Group Page publishing ▶ Enterprise Workflow Engine


Appendix: Portal Profile – University of North Carolina



Portal Offering	Vision	Approach	Functional Priorities
<p>University of North Carolina – Chapel Hill</p>  <p>http://my.unc.edu</p>	<ul style="list-style-type: none"> ▶ The portal does not replace the university web site but rather “gives information providers the ability to deliver information in a way that is more useful for end users – and it gives users the ability to customize how and when that information appears to them.” ▶ Additionally, the portal does not replace applications like registration, email, calendars, etc. but rather “allows the University to deliver this information, which is spread out across difficult-to-find pages and screens into one, easy-to-use interface with a single login.” 	<ul style="list-style-type: none"> ▶ Leverage existing investments but enhance the user experience by aggregating disparate applications via a single entry point ▶ Development team consisted of one programming consultant and three student designers plus volunteer support from existing staff across multiple offices ▶ Test rollout in summer 2002 with ongoing investment in enhancements and revisions ▶ Technology Platform <ul style="list-style-type: none"> – Oracle Portal that was part of existing university license – Two new Sun Servers 	<ul style="list-style-type: none"> ▶ Single sign-on ▶ For Students <ul style="list-style-type: none"> – Class schedule, required books, electronic reserves, and on-line resources for courses – Check grades, transcripts, GPA – Up-to-date tuition and housing bill information, library fees and fines, UNC One Card ▶ For Faculty <ul style="list-style-type: none"> – Links to Blackboard and course web space requests – Links for research sites and resources – Links to Faculty Council, FITAC, and Faculty Governance pages – Access to library news, reserves, and catalog ▶ For Staff <ul style="list-style-type: none"> – Links to UNC HR Benefits pages, Employee Services pages, etc. – Access to finance applications via an additional login


Appendix: Portal Profile – University of Texas



Portal Offering	Vision	Approach	Functional Priorities
<p>University of Texas – Austin</p>  <p>http://utdirect.utexas.edu</p>	<ul style="list-style-type: none"> ▶ “To produce an infrastructure toolkit and framework that enables campus offices to “plug” services into the portal framework and use the portal toolkit making the “portal” their method of service delivery. ▶ The portal solution should provide <ul style="list-style-type: none"> – A solution where “information is primarily found in one place and customized and/or personalized to [the user]” – “Mobility with navigation around UT [online resources]” – “Consistent look and feel to all services thus making them easier to use” – Improved communication 	<ul style="list-style-type: none"> ▶ Campus specific offering ▶ Initial launch in late 2000 with ongoing investment in enhancements and revisions ▶ First release was targeted at students only ▶ Initial release was delivered by existing IT staff and took approximately 14,745 staff hours to complete ▶ Blackboard is an integral part of the portal platform 	<ul style="list-style-type: none"> ▶ Single, role-based login ▶ Web email access ▶ University news ▶ Early functionality included also <ul style="list-style-type: none"> – Course/Class Availability – Texas Common Admissions Application – UT Direct Homepage – Class Listing, Grade Report, Registration, Registration Info Sheet – UTNETCAT Browse Function – Natural Sciences web services – UT Job Search – Engineering Career Assistance Center – Electronic Time Sheets – Employee Group Insurance

Appendix: Portal Profile – University of Wisconsin



Portal Offering	Vision	Approach	Functional Priorities
<p>University of Wisconsin – Madison</p>  <p>http://my.wisc.edu/portal</p>	<ul style="list-style-type: none"> ▶ “My UW-Madison provides students, faculty and staff with an easy-to-use, secure gateway to online information. More than just another Web site, My UW-Madison offers an impressive array of personalized services that can enhance instruction for students and faculty and boost productivity for staff.” 	<ul style="list-style-type: none"> ▶ Campus specific offering ▶ Initial launch in 2001 with ongoing investment in enhancements and revisions 	<ul style="list-style-type: none"> ▶ Single, role-based login ▶ Campus announcements, news, information, and events ▶ Email ▶ Calendar system ▶ Library services ▶ Students can <ul style="list-style-type: none"> – Enroll in classes – Monitor the status of their financial aid application – Review their course grid – Check on fines or holds ▶ Faculty and staff can <ul style="list-style-type: none"> – Use Web-based applications to do their instructional and administrative work – If appropriate, access to Financial reports – If appropriate, student advisor tools

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