

### The Future of the Campus Portal

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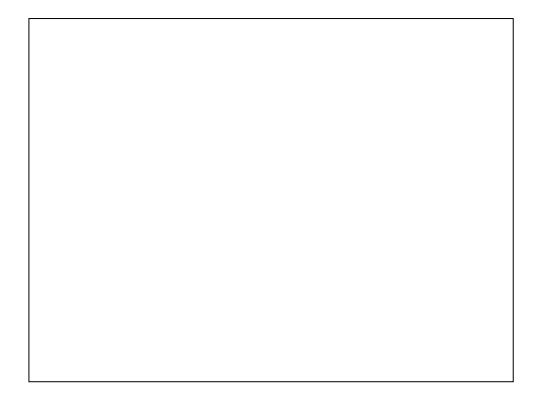
Tuesday, March 9, 2010

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## A Brief History

Jonathan Markow





## Why now?



Reason #1: It's time! (A decade of portal history)

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'Is the enterprise portal thriving, or has the web evolved in such a way that the very concept is now outdated? Has it been helped or swept into oblivion by the successive waves of progress of Web 2.0 and the already-muchballyhooed Web 3.0?"

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"In the early days of the Internet, companies sought to give users the benefit of a consistent experience by building portals that integrated multiple activities. **Portals are now mostly a thing of the past**; a few large examples such as Yahoo! and MSN still exist, but by and large they have fallen victim to what must be the most important law of the Web: a different site is only a click away. As users sought out the best sites for any given purpose, the browsing experience fractured and became ad hoc. As a result, disaggregation of Web sites and services is now the norm. "

- Phillip J. Windley, CTO, Kynetx



Focus on Simplicity Wikis UIDOETS Joy of Use Folksonomy = Recommendation Social Software The Long Tail pation Tecone Blogs Affiliation 2 0 0 Audio Video Convergence Video Mobility Memixabilit SIGN RSS OpenAPIs tandardiz SEMMITIC CSS-Design DataDriven Web Standards Microformats GERMETER @ AR 33

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"Higher education institutions are now sometimes turning to products like Sharepoint and Drupal for their enterprise portals."

-Gartner (loosely quoted)



This raises a basic question:

## What is an enterprise portal?!

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## What is a Portal?

### **Drupal – Content Management System**



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# Sharepoint – Strong collaborative tools, MS Office integration

- Typically departmental, small enterprise; trend is scaling upwards
- Viewed as an alternative to large, complex portals
- Deep integration with Microsoft products
- But may require significant development depending on scope of the project and integration requirements
- Runs exclusively on Microsoft software

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#### Vertical Portals

- Narrow content or usage
- Business intelligence
- ERP
- CRM Customer Relationship Management
- SFA Sales Force Automation
- E-Business

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We're concerned with the Enterprise!

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#### The Higher Education "Enterprise"

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- Academics
- Student life
- · Faculty & Staff
- Research
- Administration
- · Institutional web
- Dining
- Clubs
- Etc.



#### **Enterprise characteristics**

- Complexity
- Diverse constituents
- Many applications, silos
- · Community building
- Multiple brands
- Distributed content development
- · Delegated authority/administration
- Collaboration across many boundaries
- Multiple sources of identity information

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#### **Some Enterprise Portal Requirements**

- Single sign-on
- · Granular access to content, transactions
- Personalization
- Customization(?)
- · Flexible layout
- Accessibility
- Scalability
- Open to integration within and outside the enterprise



#### **Enterprise Portal 1.0**

- Simple, stand-alone:
  - e.g., Bookmarks
  - e.g., Ride board
  - e.g., Surveys
- Single sign-on
- Groups & Permissions
- Aggregated content
- File sharing
- News and announcements
- (in uPortal): WebProxy Channel (a "window on the rest of the web")

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#### **Enterprise Portal 1.5**

- A personalized view of enterprise data
- Transactions
- Facebook interface
- Business Intelligence
- Pull data from disparate sources
- Enterprise mashups
- Application messaging (e.g., Alerts)
- Aggregate campus and personal events
- Aggregate email and calendar



What's Next?

We asked some basic questions...

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#### **Questions**:

- Is the enterprise portal still important to higher education?
- If so, does the portal meet current expectations for a web-based user experience?
- What new requirements should be addressed by the campus portal?
  - For portal users
  - For portal administrators
  - For portal deployers



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### We talked to a lot of people...

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- Stakeholder calls
- Conference sessions
- Research
- Campus surveys(?)





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# Spoiler Alert: The enterprise portal is still important to higher education



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#### Nielsen says...

"Web portals have suffered a highly variable existence. Every few years, they're in, and every few years, they're out, with many of last season's darlings filing for bankruptcy or being snapped up on the cheap. It's a different story inside companies: enterprise portals know only one way, and it's up. More and more companies are establishing intranet portals, and they keep improving their features and usability."

- Jakob Nielsen, "Enterprise Portals are Popping", July, 2008

http://www.useit.com/alertbox/portals.html

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## University of Wisconsin-Madison Portal Visioning Case Study

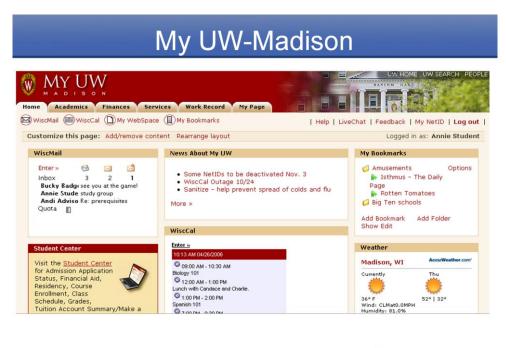
Jim Helwig





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My UW-Madison Launched in 2000 as the campus enterprise portal

Serves 80,000+ applicants, students, faculty and staff

Millions of logins a month.

Contains 75+ portlets

Focus has been on personalized information, application aggregation, user customization

## Motivation for Re-visioning

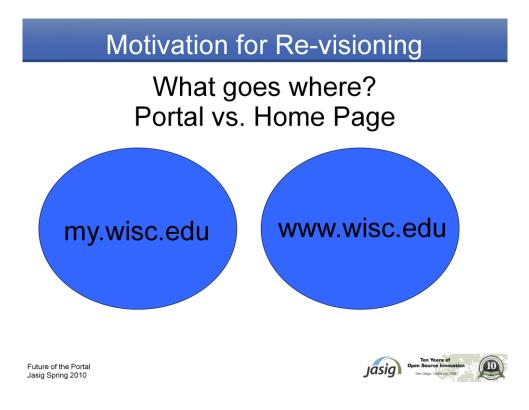
## Perception portal had become dated



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Some held the perception the portal had become dated Partially due to a UI that had not changed since the inception Some postulated the portal had outlived its usefulness Web 2.0, social networking, mobile computing more prevalent



Original guidelines no longer fit/appropriate

Confusion over what should be in; my.wisc.edu vs. www.wisc.edu

## Motivation for Re-visioning

## Viewed as Unfunded Mandate



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Photo by Tom Ventura

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While some service providers enthusiastically added more content and applications

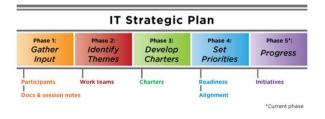
Others complain that portal is a drag on resources w/out clear justification

Governance became less effective

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## Motivation for Re-visioning

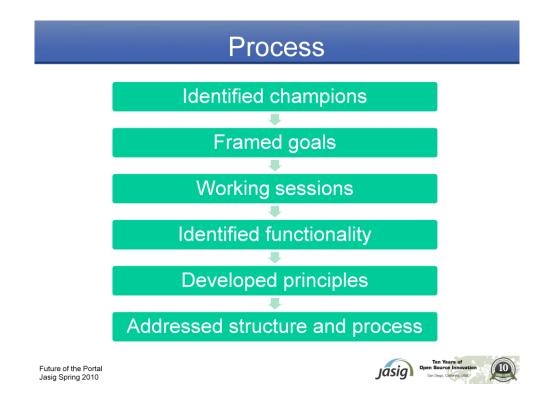
## Alignment with campus IT strategic planning effort



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We are in the middle of a major campus strategic planning effort for IT. It seemed appropriate that we look at how the portal fits into the campus IT landscape.



•Identified champions – key visionary stakeholders

•Framed goals - principles, vision, governance

•Held several multi-hour working sessions – with representatives from across campus. Need to have collaborative attitude.

•Identified new functionality – what will the new portal look like? helped frame and verify the guidelines and principles.

•Developed principles – guidelines on what is appropriate for the portal

•Addressed structure and process – how are we going to effectively execute our vision?

## Visioning Champions

- Associate Vice Chancellor from Enrollment Management
- Associate Director of University Communications
- Graduate School CIO
- Director of Cross College Advising
- Director of Academic Technology
- Director of Enterprise Internet Services

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The portal visioning processes was guided by trusted champions. These were key leaders from several campus offices that came together with an open mind and a supportive attitude. They included

- •Associate Vice Chancellor from Enrollment Management
- •Associate Director of University Communications
- •Graduate School CIO
- •Director of Cross College Advising
- •Director of Academic Technology
- •Director of Enterprise Internet Services

#### Goals

Principles and requirements Process and structure Active portal champions





We aimed to achieve the following:

Identify principles and requirements to help guide portal development Create new process and structure that can help execute the portal vision Encourage active portal champions who can provide leadership

#### Representatives from across campus Service providers and end users



We held a series of working sessions to solicit input from across campus. The attendees included service provider representatives from various administrative offices as well as faculty, staff and student representatives. They were instructed to be open minded and visionary. We started with a pair of half-day sessions that had a mixed group of about 25 participants. We later held two additional student-only sessions focused with 10 participants in each session.

#### What is NOT visioning



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It was important to clarify what was NOT visioning. Avoid using "no", "we can't", "costs too much", "bad idea" Had one flip chart where we stuck non-visioning comments

#### Personal vision: portal of the future



http://commons.wikimedia.org/wiki/File:Gelehrter\_in\_Bibliothek\_18\_Jh.jpg

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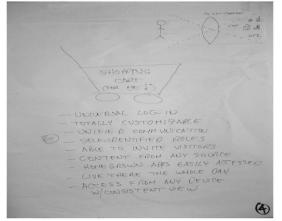
Participants were asked to close their eyes and imagine logging on to the portal five years from now.

What would be in the portal?

What would it look like?

What kind of experience would it be?

#### Small group visual diagrams

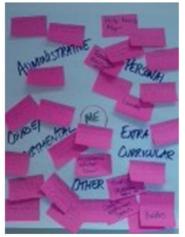


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Each group (i.e., table) was asked to come up with a vision of the portal and how it should function with respect to the array of information and services provided both on and off campus. They were asked to represent this vision as a drawing. At the end of the session, each table summarized the important features. The image and the summaries are presented below.

#### Indentify wants



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Between sessions, we looked at the different visual representations and developed what we called our Wants Map. This template contained areas of interest around "me", "presentation" and "services".

Participants were asked to use stick notes to identify individual wants or requirements and place them on the wants map.

#### Develop and share guidelines

Campus ir	ifrastructure d	vices in portal: and applications standards and		
APIs		Internal/External	:	
		The portal should personal information	•	
	Ease of Use:			ip us
All portal con searchable		ontent should be tag	able and	
	seurchuble			

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In small working groups, the wants were used to generate guidelines that would support the wants.

For example

Providing campus services in portal: Campus infrastructure and applications need to share common standards and APIs

Internal/External: The portal should access to personal, internal info

Ease of use: All portal content should be tag-able and searchable

#### Identify consensus and priorities



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The individual groups then shared the guidelines with the large group.

In retrospect, we would have done this in round-robin fashion and focused on the top priorities and had discussions looking for general agreement.

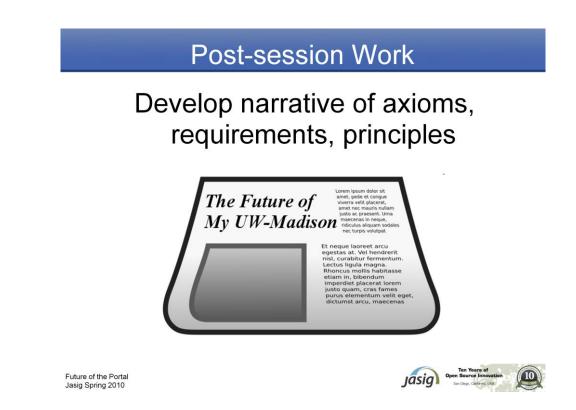
We ended up with 60 "guidelines" in nine areas, although some of these were more like specific wants or requirements, not general guidelines.

#### **Post-session Work**

#### Develop draft principles



All of our work was collected and posted on the wiki. The core team then developed draft principles (show principles)



The detailed principles to develop a narrative of axioms, requirements, principles to make them more easily digestible for a broader audience

# Vetting

- Champions and sponsors
- Session participants
- Strategic planning project leads
- Campus Communications
- User groups
- Service providers

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We are in the process of vetting these principles with groups across campus.

## Vetting

Vetting will help us:

- Feedback on the principles
- Show support
- Establish a dialog

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Our goals for the vetting process are to

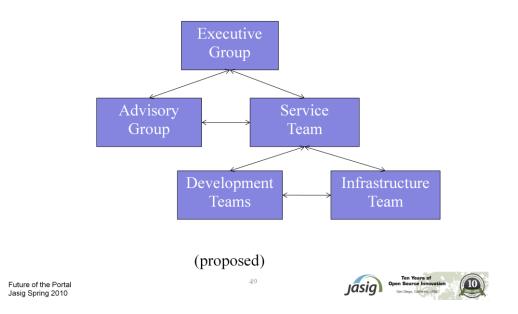
•Receive general feedback on the principles

•Indicate that there is support for portal integration from the highest levels and from across campus

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•Help establish a dialog with campus groups, departments and administrative offices

#### **Structure and Process**



A core group of visioning champions and portal sponsors have developed a new structure to support continued growth and development of the portal.

The executive group will consist of 6-8 high level representatives that will oversee vision, strategic direction and policy for the portal. They will also help with resource procurement, advocacy and fostering collaboration. They will rely on input from the Advisory Group and Service Team.

The Advisory Group will be a larger group with representatives from across campus. This will include representatives from campus departments, administrative service areas and end users. They will help develop functional requirements, provide feedback for improvement.

The Service Team is responsible for the day to day operation of the portal. They help ensure that development is consistent with the portal principles and the advisory group desires.

The development groups are funded through the budgets of service providers, departments, or the central budget. They are not directed by the service team but are expected to work loosely with it.

The Infrastructure team maintains the portal infrastructure and develops general purpose portlets. They serve both the service team and the developer teams.

## Highlights

- Portal is essential
- All important services available
- Enterprise and ad hoc groups and roles
- Public, group-specific, private
- Internal and external

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I'll leave you with a few of the insights we have distilled so far. These point to a noticeable shift in the role the portal will play on campus. It is clear that our participants still feel the portal continues to be a critical campus resource.

#### Highlights

- Use for notifications
- Search and Browse
- Flexible, customizable
- Access for all
- Access for life



I'll leave you with a few of the insights we have distilled so far. These point to a noticeable shift in the role the portal will play on campus. It is clear that our participants still feel the portal continues to be a critical campus resource.

#### More Information

#### http://bit.ly/MyUW-Visioning

#### Jim.Helwig@doit.wisc.edu

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More details about our process and the results are available here: http://bit.ly/MyUW-Visioning

#### Evolving the Vision: New Directions for Campus Portals

#### Jens Haeusser



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I'm the Director of Strategy within the Office of the Vice Provost IT at the University of British Columbia. In addition, I'm the Vice Chair of the Jasig board.

Full bio:

http://www.educause.edu/Community/MemDir/Profiles/JensHaeusser/50001

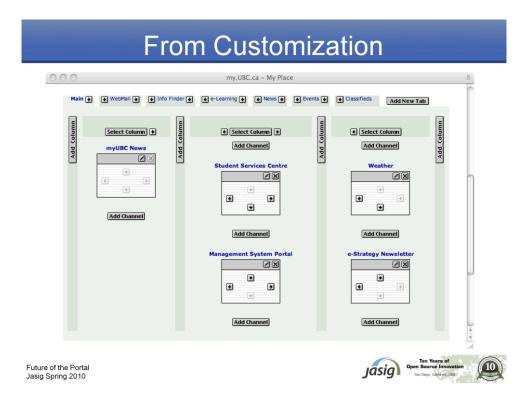
#### Evolving the Vision

- From customization to personalization
- From content aggregation to dashboards
- What about...



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10 years later, our vision for the campus portal has grown and changed. Our original ideas, while still important, have been modified and supplemented with additional requirements.



One of our original focuses was on customization. We thought a key feature of portals was to allow students, faculty and staff to customize the layout and the portlets they saw. Unfortunately many of the customization interfaces were clunky and hard to use, leading to very few people actually customizing their portal view, or only at a superficial level.

This screenshot comes from the current UBC portal running uPortal 2.5.3https://my.ubc.ca

#### From Customization

1) Select a channel All Categories	category		r
2) Add a new channe Cancel and retur			
Channel name	Description		
About myUBC	Find out what is myUBC.	Add	ų
CITR Radio	Quick link to listen to CiTR 101.9 FM (the UBC campus radio station) live.	Add	
Clock	Add a spinning clock to your page.	Add	
Daily Business Cartoon	Read a different business cartoon by Ted Goff everyday.	Add	
Dictionary	Look up a word in the dictionary or thesaurus of Dictionary.com	Add	
Dictionary of Computing	Look up terms, acronyms, etc. to do with computing/computer.	Add	
e-Strategy Newsletter	UBC e-Strategy monthly Update newsletter, featuring IT-related articles about e-Learning initiatives at the university	Add	
Events Calendar	View campus-related and local community events of interest	Add	
Guest Information	Guest Information Channel	Add	
Heads Up!!	Quick links to useful UBC IT sites such as UBC Wireless, Student Services, ITServices, and e-Strategy. Short news notice from UBC IT.	Add	
ITServices - Ask Me	Have your question regarding ITServices answered from a large collection of Frequently Asked Questions.	Add	
Library Overdues	Quick link to setup your e-mail such that you receive notification for overdue library items.	Add	4
Live@UBC	Search for public events from the Live@UBC calendar.	Add	

Adding new content was similarly clunky- unless provided in the default view, it was very hard for people to find additional content that was relevant to what they were wanting to do.

This screenshot comes from the current UBC portal uPortal 2.5https://my.ubc.ca

#### From Customization

#### Why?





While customization is important, why are we forcing our users through these complicated and non-intuitive customization interfaces, when we already know so much about them? What we've been told is that people want personalized content that is relevant to who they are and what they can do at our institutions.

We know-

- Your affiliations (faculty, staff, student)
- Your department (Chemistry, English)
- Your classes (Physic 101, Spanish Tapas)
- Your roles (TA, Tenure Committee)
- Your demographics (age, gender, address)
- Your likes (club memberships, advising)
- Your preferences (colour blind, large text)
- Your device (laptop, iPhone, screen reader)

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We already know so much about people who connect with the portal- their institutional affiliations and roles, and a wide range of additional information that should allow us to personalize the portal to their particular requirements, without pushing customization off onto them.

The portal should reflect who you are, what you need, and what you can do

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Given the rich amount of information we do know, the portal needs to reflect this, and provide that personalized experience.

The portal should reflect who you are, what you need, and what you can do



The portal should reflect who you are, what you need, and what you can do



The portal should reflect who you are, what you need, and what you can do



The portal should be your one-stop-shop that highlights your available resources, and provides a sense of a unified institution

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Our investigation has also found that, with often hundreds of different websites on online applications that could be potentially useful and accessible to students, faculty, and staff, the portal could be a critical resource for showing them all of the varied content available to them. In addition, the portal can go a long way toward providing a seamless experience of navigating our campuses, blurring and obscuring the various departmental and political boundaries that often frustrate our participants, providing that sense of a single institution rather than a fractured, independent landscape.

The portal should be your one-stop-shop that highlights your available resources, and provides a sense of a unified institution



The portal should be your one-stop-shop that highlights your available resources, and provides a sense of a unified institution



The portal should be your one-stop-shop that highlights your available resources, and provides a sense of a unified institution



#### From Content Aggregation

The original vision-

- Provide as much content as possible inside the portal
- Provide single sign-on links to content you can't aggregate

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When first designing the portal, we thought that the portal should be the place not just to find content, but to interact with it.

#### From Content Aggregation

The challenge-

- Not all content fits nicely in little boxes
- Not all content plays nicely in a portal
- So many SSO sites, so many links...

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The drive to pull content into the portal hasn't worked in many cases- complex web applications don't integrate well, and the sheer range and complexity of potential information has led to bewildering choices for users.

#### From Content Aggregation

# How can we provide access to the information you need, when you need it?





How do we help users choose where to focus? When faced with hundreds of potential resources, and daily workflows that can involve moving between a range of enterprise systems (LMS, SIS, CMS, etc), how can we assist users in choosing what to do next?

#### To Dashboards

One solution: Dashboards

- Provide summary information about a range of content and services
- Provide up-to-date information that allows you to choose when and where to dive deeper



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Interactive dashboards that summarize content from a range of enterprise services can give people the information and tools they need to help them choose where to go and what to do next.

#### To Dashboards my MBC E Ers Topics v Admin \* 🚔 Bradle Help -Tin Log Out Dashboa Accounting Club Meeting 0 4 Alerts 1 00 1.24 44 1 ...... B Favorites Headlines ATH Nes My 2 C Events **R** 0 Change role to Faculty A ... iety of UMBC-rails Today, October 27th = hange Cotain an Internship 9:00 AM - Public Poky: 1st F. Most Pawpular Stories The been hearing runo some point, but my sol Ť Themes Coffee with Cara 3:00 PM - The Com hat Weezer might be r 10 44 Ű Feedback Do you like myUMBC? 🗇 Yes 🔿 No 😁 Mayb w. October 28th -SA tain an Internship AM - Public Publicy at Treats, Net Tricks . . (OK) Things I Didn't Know When I Was in 0

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The portal at the University of Maryland, Baltimore Campus is a good example. The dashboard on the top left summarizes information across their enterprise notification system, CMS, email, calendar, and LMS.

This screenshot comes from the current custom developed UMBC portal, https://my.umbc.edu/



If you hover over one of the notifications, it brings up a popup showing more information (subject of the alert, course that has new content, etc), and provides a single click deep link into the system the content comes from, letting people move seamlessly directly to the content that has changed.

This screenshot comes from the current custom developed UMBC portal, https://my.umbc.edu/

Web 2.0?

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The modern portal must also play well in a web 2.0 world- bringing the full range of modern technologies (AJAX, JSON, etc) into the portal.

# Web 2.0



The interactivity of Web 2.0 has been used to help deal with the customization problem- dramatically improving customization through AJAX tools such as drag and drop and live previews.

This screenshot comes from the current Yale portal running uPortal 3.1, https://portal.yale.edu

uPortal: http://www.jasig.org/uportal

#### Web 2.0 YaleInfo: UNIVERSITY PORTAL More Channels Browse Channels Search Category Library Books Out Orbis Search Orbis Search and Library Links Yale Library News New Popular Academics Press Releases from Yale Academics Admin Events Faculty Fun Imported ITS Library News SAM channels Search Staff ÷ Channel Details Library Books Out uncements & News Library books checked out. Add to my page Use it now Done (10 Future of the Portal jasig

AJAX has also simplified the addition of new portlets, using inline search and customized portlet display based on roles.

This screenshot comes from the current Yale portal running uPortal 3.1, https://portal.yale.edu

uPortal: http://www.jasig.org/uportal

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#### Mashups?

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Combining content inside the portal is also a key feature. However, as important as it is to be able to bring content into the portal, it's also very important to work with content providers to allow their content to be leveraged by students, faculty, and staff outside of the portal as well- allow users to create their own mashups and aggregation in the tools that work for them.

# Mashups



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Yale uses AJAX and JSON to combine information from Google Maps and a Yale database to present a searchable campus map within the portal.

This screenshot comes from the current Yale portal running uPortal 3.1, https://portal.yale.edu

uPortal: http://www.jasig.org/uportal



A number of schools have also integrated social networking into their portal, often with rich interaction- the two Facebook portlets don't just show summary information, they allow portal users to update Facebook information without leaving the portal.

This screenshot comes from the current Yale portal running uPortal 3.0.1, https://portal.uci.edu

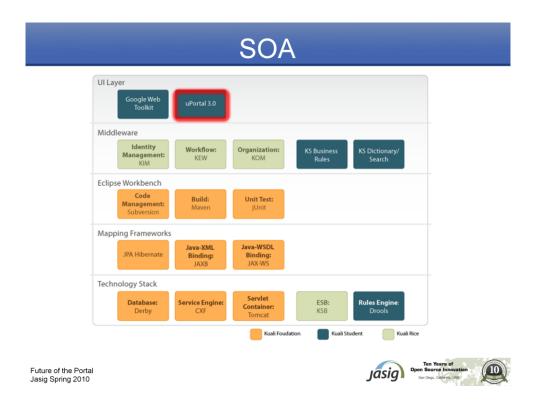
The Facebook portlet is available in the Jasig Portlet collection, http://www.jasig.org/wiki/display/PLT/Home

#### SOA?

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The portal has also been positioned as a potential frontend for a Service Oriented Architecture- the place to coordinate and display information from a range of headless business services.



Complex applications such as Kuali Student (http://student.kuali.org/) are now being built using SOA, and have worked on the potential integration with portals. While an early vision was to provide all of the content of these applications within the portal, the need for high level of usability in these complex, enterprise systems has led to a change in direction. While an entire enterprise SOA app may not lend itself well to being presented entirely within the portal, there is still a need for dashboarding of a number of the underlying services, which display well in the portal. In addition, smaller services that are not part of an enterprise application display very well within the portal.

Usability and Accessibility?

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One of the key challenges with earlier portals has been around usability and accessibility. Older portal frameworks have often been clunky, and difficult to adapt for users with a wide range of needs.

# Usability and Accessibility



One project that has tackled the problem of usability and accessibility for web applications in general, and portals specifically, is the Fluid project (http://www.fluidproject.org/). Fluid has come out with both a range of AJAX based software components that can integrate well with portals, but also a range of resources for designers and developers (UI walkthrough protocols, higher education personas, design patterns, and a designer handbook).

Image Lightbox				
	<ul> <li>To use the keyboard: Select an image using i, k, m or j, or the arrow keys.</li> <li>Move an image using CTRL + a direction key.</li> <li>View an image by pressing Enter.</li> </ul>			
Dragonfruit	Kiwano	Blackberry		
Cherry	Fig	Kiwi		
Kumquat	Tamarillo	Mangosteen		

Fluid has also worked directly with uPortal, and the Fluid skinning system and framework, as well as several accessible components, are now imbedded with the latest uPortal release.

Fluid Infusion: http://fluidproject.org/products/infusion/ uPortal: http://www.ja-sig.org/wiki/display/UPC/Home

#### Your Turn

Questions and Discussion

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Additional comments:

We need to break down the barriers between what has traditionally been seen as two different things- the campus website, and the campus portal. People should be able to seamlessly flow between the two- starting at the campus website, being prompted to log into the portal without a massive context shift if they want to access personalized or secure content, and never having a jarring transition as they move back and forth between the two. We need to end the separation between teams- too many campuses have a web team, and a different portal team.

The portal can be the primary fall back source for messages and notification. As we build workflow and notification systems, those should display, at least at a dashboard level, within the portal. And as we provide more options for our users to engage with these messages, we need to provide them with multiple ways to get and be notified of this changing information (subscribe via RSS, get a text message on your cell phone, forward your email to Gmail or Live@edu, etc), but also provide a single definitive place to go to see all that information- the portal.