Why a SUNY Portal Evaluation?

A collaborative evaluation…

- Distributes evaluation workload
- Reduces/eliminates redundancy
- Allows SUNY talent/expertise knowledge transfer
- Underscores need to provide SUNY resources to constituents via single authentication/password process
- Leverages opportunity as large consortium
Portal Definition

A portal is a web gateway providing access to services via a single authentication and sign-on method. It is a method institutions are using to provide seamless and transparent user access to disparate applications for which the user has authority.
Portal Evaluation Stages

- SUNY Portal Requirements
- Product Selection
- Proof of Concept
- Functional Review
- Reports and Feedback
- Remaining Action Items
- Feedback
SUNY Portal Requirements

Small group of volunteers from Brockport, Fredonia, Old Westbury, Onondaga CC, Suffolk CC, Upstate Medical, ITEC, Learning Environments, SICAS, SUNY Central Business Systems

Drafted initial functional requirements document-included functional and technical specifications

Ten-page document then rolled into online survey
Product Selection

From list of thirty + products we focused on:

- Luminis due to integration with student information system for Banner campuses.
- uPortal due to use of this open source ‘core’ in Luminis and open source opportunities for SUNY.
- Oracle due to current licensing situation and oracle use within SUNY.
Proof of Concept

- Participants
- Goals
- POC Effort
- Expected Benefits
- POC Procedure
- Use Cases
Proof of Concept Participants

- SUNY System Administration
- SI CAS Center
- SUNY Learning Environments
- SUNY ITEC
- SUNY Fredonia
- SUNY Brockport
Specific Goals

- Portal knowledge transfer to SUNY
- Evaluate comparative development effort required by each portal
- Assess difficulty of integrating existing services and authentication policies into each portal
- Provide indirect assessment of Total Cost of Ownership (TOC)

As for the future, your task is not to foresee but to enable it. (Antoine de Saint-Exupery)
Proof of Concept Effort

- Select leading portal technology products
- Implement demonstration portlets having value to SUNY campuses and service groups
- Create single-sign on portal authentication through existing SUNY authentication methods
- Determine level of development and operational training needed to support each product
Expected Benefits

- Profile each portal technology for
  - Ease of sharing portal efforts and knowledge among SUNY groups (leverage)
  - Ease of development and administration
  - Fit to strengths of SUNY groups

- Develop suite of frameworks, standards, and tools for SUNY-wide development efforts

- Deeper understanding of portal service architecture requirements
Proof of Concept Procedure

- Assemble SUNY PoC team
- Requirements Specification
- Scope of Work Agreement
- Implementation Scheduling
- Training and Execution
- Review and Publication of Findings
Requirements Specification

- Compliance with standards
  - Importance of JSR-168
- Authentication and sign-on policies
  - Single-Sign on
- Customization features
  - Need to ‘brand’ portals
  - Use of familiar web design tools
  - Look and feel specific to portal user & role
- Specific Portlet use cases
Scope of Work Agreement

- Duration of engagement
- Deliverable services and products
  - Vendor deliverables
  - SUNY deliverables
- Licensing and ownership of results
Proof of Concept

Engagements

- uPortal with Unicon April-May 2005
- Oracle with Campus EAI July-August 2005
- Luminis with Sungard SCT October 2005
Proof of Concept Results

- Portal comparative findings
- Coding standards and frameworks
- Developer and portal builder tools
Portal Comparative Findings

- Technical Features
- Skill Set Requirements
- Single Sign On
- Presentation and Customization
- Use Case Coverage
- Platforms
- Portal Support
- Administration Requirements
Portal Comparative Findings

Technical Features

• **Web Content Tools**
  Editing and presentation tools

• **Portlet Wizards / Publishing Tools**
  Web-guided publication

• **Web content management**
  Repository and version control

• **Transportable Content**
  Export portal pages and objects to other portals

• **JSR-168 portlet container**
  Standard-compliant app server

• **3rd Party IDE support**
  Application server deployment
## Portal Comparative Findings
### Technical Features

<table>
<thead>
<tr>
<th>Development Features</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Content Tools</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Portlet Wizards and Publishing Tools</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Web content management</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Transportable Content</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>JSR-168 portlet container</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3rd Party IDE support</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Key

- 0: not present
- 1: present
Portal Comparative Findings
Single Sign On

Required Authentication Policies
• LDAP Authentication
• SUNY System Admin Authentication

Optional Authentication Policy
• Yale CAS Authentication
## Portal Comparative Findings

### Single Sign On

<table>
<thead>
<tr>
<th>Single-sign on policies</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDAP policy</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>SUNY System Admin policy</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Yale CAS policy</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**Key**

- **0** not avail
- **1** available
Portal Comparative Findings
Presentation and Customization

Presentation and Customization
• SUNY and Campus skin presentations
• User customization
• Web skin presentation authoring tools
• Third party skin presentation authoring tools

User Provisioning
• Automatic user provisioning
• Batch user provisioning
# Portal Comparative Findings

## Presentation and Customization

<table>
<thead>
<tr>
<th>Presentation and Customization</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUNY and Campus skin presentations</td>
<td>9-10</td>
<td>9-10</td>
<td>9-10</td>
<td>9-10</td>
</tr>
<tr>
<td>User customization</td>
<td>9-10</td>
<td>9-10</td>
<td>9-10</td>
<td>7-8</td>
</tr>
<tr>
<td>Web skin presentation authoring tools</td>
<td>5-6</td>
<td>5-6</td>
<td>5-6</td>
<td>5-6</td>
</tr>
<tr>
<td>Third party skin presentation authoring tools</td>
<td>5-6</td>
<td>5-6</td>
<td>5-6</td>
<td>3-4</td>
</tr>
</tbody>
</table>

## User Provisioning

<table>
<thead>
<tr>
<th>User Provisioning</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic user provisioning</td>
<td>3-2</td>
<td>5-6</td>
<td>9-10</td>
<td>5-2</td>
</tr>
<tr>
<td>Batch user provisioning</td>
<td>3-2</td>
<td>9-10</td>
<td>9-10</td>
<td>unavail</td>
</tr>
</tbody>
</table>
Portal Comparative Findings

Support

Vendor Support
• Vendor telephone support
• Vendor online support
• Vendor online documentation

User and Standards community
• Independent user community
• Standards community participant
• Products adhere to community standards
# Portal Comparative Findings

## Support

<table>
<thead>
<tr>
<th>Vendor Support</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone support</td>
<td>U</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Online support</td>
<td>L</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Vendor online documentation</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
</tbody>
</table>

### Key
- **A**: fully avail
- **L**: limited
- **U**: unavail

## User and Standards community

<table>
<thead>
<tr>
<th>User and Standards community</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent user community</td>
<td>A</td>
<td>A</td>
<td>U</td>
</tr>
<tr>
<td>Standards community participant</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Products adhere to community standards</td>
<td>A</td>
<td>A</td>
<td>L</td>
</tr>
</tbody>
</table>

### Key
- **A**: present
- **L**: limited
- **U**: not present
Portal Comparative Findings
Administrative Skill Requirements

Administrative skills

• J2EE Application Server
• HTTP Web Server
• Tomcat J2EE Server
• Database storage
• LDAP administration
• SSL administration
## Portal Comparative Findings
### Administrative Skill Requirements

<table>
<thead>
<tr>
<th>Administrative skill requirements</th>
<th>uPortal 2.3.2</th>
<th>Oracle Portal 10.1.2.0.2</th>
<th>Luminis 3.3.1</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>J2EE Application Server</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>HTTP Web Server</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Tomcat J2EE Server</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Database storage</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>LDAP administration</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>SSL administration</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
Twiki web collaboration for SUNY development
- Project development space
- Document management system
- Knowledge base
- Topic forums
- Groupware tool

Our Twiki is at http://concept.itec.suny.edu/twiki/bin/view
Functional Review

- Participants
- Survey Objectives
- Survey Findings
- Weighted Desired Functionality
- Product comparison
Participants

- Twenty Survey Respondents
- Columbia-Greene Community College
- Monroe Community College
- SUNY Fredonia
- SUNY Geneseo
- SUNY Maritime
Survey Objectives

- Determine status of current services and portal decisions within SUNY system
- Determine services most desired for connectivity via portal technology
- Determine desired functionality
Survey Findings

<table>
<thead>
<tr>
<th>Services 68% + plan to continue</th>
<th>Services 68%+ do not provide or will replace</th>
<th>Services 50/50 on continuing or replacing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Student Calendar</td>
<td>Communication</td>
</tr>
<tr>
<td>Productivity Suite</td>
<td>Document Management</td>
<td>Course Management</td>
</tr>
<tr>
<td>Library</td>
<td>Content Management</td>
<td>Course Delivery</td>
</tr>
<tr>
<td>Student Information System</td>
<td>Workflow</td>
<td>Faculty Calendar</td>
</tr>
<tr>
<td>Online Training</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Services Weighted as High Priority

- Email
- Calendaring
- Communications
- Course Management
- Electronic Course Delivery
- Library Services
- Student Information System
- Student Information System 3rd Party Tools
- Compliance to Open Standards
- Self-service
- Easy-to-use interface
- Single-Sign on
- Self-registration of new users
- Desktop Functionality
- Device support
- 24x7x365 availability
- Remote access
- ADA compliance
- Ease of Maintenance and Support
Services Weighted
Medium and Low Priority

- Content Management
- Workflow Features
- College Catalog Management
- Customization
- Bookmarks

- Online Training
- Productivity Tools
Audience feedback:

- Did we exclude any important services?
- Which services deemed most critical to particular interest groups and users?
- Recommendations to revise high, medium, low weightings?
- Can we identify 1-3 services of highest priority for additional proof of concept?
Remaining Action Items

- Complete Proof of Concept evaluations
- Finish Functional portal reviews
- Revisit Portal criteria for SUNY
  - ADA accessibility compliance
  - Mobile and wireless device support
Current thoughts

Portal builders should adhere to open source standards – no need to go it alone

Portlet shoppers need to continue to insist on standards compliance from vendors

Will SUNY need a portlet clearinghouse to insure operation and configurability for campus consumers?

Keep Looking at Portal Products

Continue building community and SUNY consortium

Use Twiki as communication avenue and repository

Active Participation in Global Portal Community

Look to our own
Questions for Stakeholders

What does each Institution hope to gain from portal technology?

Which services should constituents be able to access via the portal?

Which services, if any, does the institution want to replace with a portal solution?
Questions cont.

Is the integration of local institutional resources more important than the integration of SUNY-wide resources or of equal or less importance?

Do we all benefit from continued collaboration, discussion, research, and involvement of stakeholders?

How do we get all stakeholders involved, and continue building community?
Dialogue
Thanks!

Contact Information
Karen.Klose@fredonia.edu
716-673-4670

Our Twiki is at http://concept.itec.suny.edu/twiki/bin/view
Access using suny_twiki/ynus2 (why not us, too)