

Nazareth College of Rochester
Portal Implementation Planning Session
October 19 – 20, 2006

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Day 1

- Session Introduction
 - Overview
 - Facilitator and Participant Introductions
 - Scope of the Implementation
- Strategic Planning
 - Goals and Success Metrics
 - Aligning the Organization
 - Implementation Planning – The Road Ahead
- Strategic Capstone Activity

Day 2

- Tactical Planning
 - Authentication, User Groups, and Permissions
 - Content
 - Layouts
 - User Experience
- Session Capstone Activity
- Q&A

Overview of the Implementation Planning Session

Prepared for Nazareth College

August 30, 2006

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Article II. Introduction

Section 2.01 Objective

The purpose of this document is to provide an overview of what Unicon will cover during the course of implementation planning session and to suggest the appropriate audience (in terms of the role within the portal project) for each topic covered in the session.

Article III. Overview of Agenda and Suggested Audience

The following paragraphs list the topics covered within the Implementation Planning Session, along with the suggested audience for each topic. These are arranged and numbered sequentially. The duration of time spent on each of these topics varies by institution, depending upon the previous experience at the institution, interaction of the participants, and number of participants. Typically we strive to complete topics one through three in the morning on day one, and topics four and five in the afternoon; on day two, topic six in the morning and seven through nine in the afternoon. Please note although the suggested audience changes from topic to topic, many institutions opt to include all attendees in all topics during the two-day session.

(1) Introductions

Suggested Audience

- *Project Sponsor/Champion*
- *Project Manager*
- *Portal Manager*
- *User Experience Lead*
- *Help Desk Liaison*
- *Marketing Representative*
- *Portal Constituents Representative(s) – example: students, faculty, staff, clubs*
- *Owners of systems with which Academus will be integrated – example: SIS, CMS, Finance, Reporting, Library*

(2) Goal Setting - *what is the purpose of this implementation?*

Interactive session to list project goals and decide on the immediate goals based upon criticality for success and expediency.

Suggested Audience

- *Project Sponsor/Champion*
- *Project Manager*
- *Portal Manager*
- *User Experience Lead*
- *Help Desk Liaison*
- *Marketing Representative*
- *Portal Constituents Representative(s) – example: students, faculty, staff, clubs*
- *Owners of systems with which Academus will be integrated – example: SIS, CMS, Finance, Reporting, Library*

(3) Success Metrics - *how will we know we are successful?*

Interactive session to develop metrics to measure progress towards attainment of goals.

Suggested Audience

- *Project Sponsor/Champion*
- *Project Manager*
- *Portal Manager*
- *User Experience Lead*
- *Help Desk Liaison*
- *Marketing Representative*
- *Portal Constituents Representative(s) – example: students, faculty, staff, clubs*
- *Owners of systems with which Academus will be integrated – example: SIS, CMS, Finance, Reporting, Library*

(4) User Groups - *who are we targeting and for what purpose?*

(A) *Brief overview of the data and technical underpinnings behind integrating user information from other sources, its impact on maintenance in the portal system and relationship with delivery of contents and services to the user-groups.*

(B) *Interactive session to develop the list of user groups to be served and scale back the list to infuse realistic expectations with regard to administering the portal groups.*

Suggested Audience

- *Project Manager*
- *Portal Manager*
- *Technical Administrator*
- *Portal Team Personnel (developers, analysts, support staff)*
- *User Experience Lead*
- *Help Desk Liaison*
- *Marketing Representative*
- *Portal Constituents Representative(s) – example: students, faculty, staff, clubs*
- *Owners of systems with which Academus will be integrated – example: SIS, CMS, Finance, Reporting, Library*
- *Content Contributors*

(5) Content - *what information are we including in our portal?*

(A) *Demo of standard Academus portlets and channels, simple customizations, and integration possibilities.*

(B) *Interactive session to determine what contents must be included in the current implementation, keeping in mind the goals decided upon at the start of the session.*

Suggested Audience

- *Project Manager*
- *Portal Manager*
- *Technical Administrator*
- *Portal Team Personnel (developers, analysts, support staff)*
- *User Experience Lead*
- *Help Desk Liaison*
- *Marketing Representative*
- *Portal Constituents Representative(s) – example: students, faculty, staff, clubs*
- *Owners of systems with which Academus will be integrated – example: SIS, CMS, Finance, Reporting, Library*
- *Content Contributors*

(6) Layouts - *how is content organized and distributed to users?*

(A) *Brief discussions around the mechanics of distributing contents and services to user groups through tabs, and fragments.*

(B) *Interactive session to determine how contents and services are to be delivered to different user groups in the current implementation.*

Suggested Audience

- *Project Manager*
- *Portal Manager*
- *Technical Administrator*
- *Portal Team Personnel (developers, analysts, support staff)*
- *User Experience Lead*
- *Portal Constituents Representative(s) – example: students, faculty, staff, clubs*
- *Content Contributors*

(7) Managing the portal - *how do we keep the portal running smoothly?*

Discuss guidelines around portal management in the areas of user guidance and help, system administration and technical management and maintenance support.

Suggested Audience

- *Project Manager*
- *Portal Manager*
- *Technical Administrator*
- *Portal Team Personnel (developers, analysts, support staff)*
- *User Experience Lead*
- *Help Desk Liaison*
- *Owners of systems with which Academus will be integrated – example: SIS, CMS, Finance, Reporting, Library*

(8) Best Practices - *what can we learn from previous implementations?*

Suggested Audience

- *Project Manager*
- *Portal Manager*
- *Technical Administrator*
- *Portal Team Personnel (developers, analysts, support staff)*
- *User Experience Lead*
- *Help Desk Liaison*
- *Marketing Representative*

(9) Q&A

The purpose of this survey is to gather information about your institution so that your Unicon Implementation Manager can provide the highest level of value to you during your implementation.

1. Why has your institution chosen to implement a portal?
2. What are your top three goals for the portal implementation?
3. Have you been involved in any other similar implementations at your institution (i.e. CMS, SIS, etc.)?
4. If yes,
 - a. What was your role?
 - b. What went well with the implementation?
 - c. What could have been improved upon?
5. What types of users will use the portal on your campus? (students, staff, faculty, etc.)
6. What strengths do you identify within your institution that may provide an advantage for a successful implementation of this system?
7. What weaknesses do you identify within your institution that may be barriers to a successful implementation?
8. Have you attended a demonstration of uPortal or Academus?
9. Please list any other considerations you feel it is important for your Implementation Manager to know.



Academus

Roles and Responsibilities

Confidential & Proprietary



Introduction

Success starts with creating the right team; a group of qualified individuals who know their roles and how to get the job done! In order to ensure the most successful workshop, the right people have to be in attendance. The purpose of this document is three-fold: discuss the essential roles, define clearly the responsibilities, and determine who should be involved in the workshop.

Role	Responsibility on Project	Responsibility for Workshop
Project Champion	<p>This role is assigned to support and drive the project forward and is crucial to its success. This role will not get involved in the day-to-day planning, co-ordination and management of the implementation; but will advocate its benefits, assist and mentor the team and navigate any roadblocks to keep the project on track.</p> <p>This function is fulfilled by _____ Olga Lapczak</p>	<p>This person will assist in problem solving and act as a facilitator during the workshop.</p>
Project Sponsor	<p>Executive sponsor, also called project sponsor, is the person that is ultimately responsible for Academus. This person has the autonomy to sanction change and determine priorities.</p> <p>This function is fulfilled by _____ Olga Lapczak _____</p>	<p>The sponsor kick-off adoption with short speech at the opening of the workshop and has to be available for strategic direction and scoping information during the pre-workshop phase. During the workshop, the executive sponsor must be available for policy decisions appropriate for his or her level of authority.</p>
Project Manager	<p>This is the person responsible for the project. This person has overall responsibility for the successful planning and execution of the implementation and adoption.</p> <p>This function is fulfilled by _____ Mary Heid _____.</p>	<p>This person will work closely with the facilitator. The project manager, as the client of the workshop process, receives the deliverables.</p>
Technical Lead	<p>This role is responsible for setting leading the technical development team. This person will</p>	<p>This person will ensure that technical</p>

	<p>establish the direction and monitor the progress of the technical development team.</p> <p>This function is fulfilled by <u>Mary Heid</u>.</p>	<p>requirements are taken into consideration during the workshop.</p>
<p>Help Desk Manager</p>	<p>This role addresses and responds to <u>user's</u> technical questions.</p> <p>This function is fulfilled by <u>Brenda Grammatico</u>.</p>	<p>This role will represent the help team and aid in creating and/or identifying future help strategies.</p>
<p>Portal Constituents group representatives</p> <p>Examples include: students, faculty, and administrators</p>	<p>These individuals represent the interests of a larger group of users. It is important to have at least one person from each user group to gather input, address usability, and drive adoption.</p> <p>This function is fulfilled by _____ group _____.</p>	<p>Portal constituents may or may not be present for the workshop but targeting their needs is integral to portal implementation and adoption.</p>
<p>Owners of major systems to be integrated with Academus</p> <p>An example might include the learning management system or SIS</p>	<p>This person has ownership of an existing application that may be integrated with the portal. This role is an advocate for other users accessing current functionality and can help ensure a smoother transition during implementation and adoption.</p> <p>This function is fulfilled by _____.</p>	<p>This role should be considered during introductions and goal setting portions of the workshop.</p>
<p>Portal team staff</p> <p>Examples include: developers, graphical designers, etc.</p>	<p>These individuals bring portal expertise to the workshop and prove helpful in identifying usage scenarios and assisting in successful implementation.</p> <p>This function is fulfilled by _____ group _____.</p> <p>This function is fulfilled by _____ group _____.</p> <p>This function is fulfilled by _____ group _____.</p>	<p>These roles assist in defining optimal portal layouts.</p>
<p>Portal Manager</p>	<p>This person serves as the portal administrator for Academus. This user participates in both the Portal Manager and System Administrator training.</p> <p>This function is fulfilled by <u>Mary Heid</u>.</p>	<p>This role should be represented throughout the entire workshop.</p>

<p>System Administrator</p>	<p>This individual is responsible for system configuration and maintenance.</p> <p>This function is fulfilled by <u> Mary Heid </u>.</p>	<p>For the technical how-to discussions regarding content and layout, this person should be involved.</p>
<p>WCM Manager</p>	<p>Overall technical responsibility for the Academus WCM Product. Participation in the Academus WCM Training and fully understands the configuration options provided to allow for flexibility within the WCM Product. Responsible for all group and user administration.</p> <p>This function is fulfilled by _____.</p>	<p>This person should participate in the workshop providing WCM is implemented as a solution.</p>

The above roles will comprise the portal team. For some institutions, a single individual may hold multiple roles, such as technical lead and system admin. This team will help to ensure successful implementation and adoption. Your institution’s Academus group will find assistance and answers with our Unicon team. The following details the resources available for you.

Role	Responsibility
<p>Project Manager</p>	<p>This individual serves as the liaison between your institution and Unicon. This role provides input, reports status, and serves as your advocate.</p> <p>This function is fulfilled by <u> Murali Menon </u>.</p>
<p>Trainer</p>	<p>This person facilitates the Roadmap workshop, provides training, and details best practices.</p> <p>This function is fulfilled by <u> Murali Menon </u>.</p>
<p>Account Manager</p>	<p>This is the person ensures your overall success. This role serves as a champion, problem-solver, and go-to person.</p> <p>This function is fulfilled by <u> Stephanie LeSueur </u>.</p>
<p>Deployment Manger</p>	<p>This role for the planning and execution of your portal solution.</p> <p>This function is fulfilled by _____.</p>

<p>Client Support Specialist</p>	<p>This person monitors the support of your institution and escalates any potential roadblocks to successful implementation to the Project Manager.</p> <p>This function is fulfilled by _____.</p>
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This document is intended to bring the right people together for the Roadmap in order to ensure successful implementation and adoption. Please return within five business days to Unicon's training department.

Academus and Zimbra Implementation Project Plan Outline for the Nazareth College

No:	Task Description	Responsible	Pred. Task	Estimated Duration
1	Implementation Planning Session - IPS	Nazareth, Unicon PS		2 Days
2	Project Planning <i>(to sketch out schedule and milestones based upon decisions made as a result of the IPS)</i>	Nazareth	1	1 Week ???
Academus Installation				
3	Install hardware, software, database	Unicon Hosting		
4	Return completed blueprint to Unicon	Unicon Hosting	3	
5	Check connectivity and authorizations using supplied credentials	Unicon PS	4	1 day
6	Install, Deploy and Verify Academus Installation	Unicon PS	5	2 days to 1 Week
7	Validate Academus Installation	Nazareth	6	1 day
Portal Branding				
8	Gather requirements for one (1) custom skin for Academus	Unicon PS, Nazareth		1 week
9	Design and Develop custom skin for Academus	Unicon PS		1 week
10	Install custom skin for Academus	Unicon PS		1 day
11	Validate installation of custom skin for Academus	Nazareth	6	1 day
Training				
12	Academus Portal Manager and Groupware Training	Unicon PS	7	2 days
13	System Administrator Training (Academus)	Unicon PS	7	1/2 day
WebAdvisor Integration				
14	Install and configure Datatel's WebAdvisor components and modules	Nazareth	7	???
15	Install, configure and test the SSO channel between Academus and WebAdvisor	Unicon PS	14	1 week
16	Validate the SSO channel between Academus and WebAdvisor	Nazareth	15	1 day
Colleague R18 Integration				
17	Install and configure Datatel's Colleague EDX components and modules (R18 Beta)	Nazareth	7	???
18	Install, configure and test the data interface between Colleague and Academus Portal Group Hierarchy	Unicon PS	17	???
19	Validate data interface between Colleague and Academus Portal Group Hierarchy	Nazareth	18	???
Zimbra Installation				
20	Install, configure and test the Zimbra eMail environment	Unicon Hosting		
21	Design and Develop processes and methods to obtain data for populating user, group and old email data	Nazareth	20	
22	Populate users, groups, calendar, migrated email data	Nazareth ???	21	???
23	Design, develop and test link to Zimbra from Academus Portal (no SSO)	Unicon PS	7	1 week
24	Validate the link to Zimbra eMail Server from Academus Portal (no SSO)	Nazareth	22	2 days
25	Test direct access to Zimbra eMail application	Nazareth	21	2 days
26	Follow the implementation, testing and pilot cut-over path determined in step 2	Nazareth	7	???

Unicon PS - Unicon Professional Services

**Nazareth College of Rochester
Portal Steering Committee
2006-2007**

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**Implementation Planning Session
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October 19-20, 2006**

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Initial ITS Draft Only
Nazareth College of Rochester, Spring 2006
Portal Purchase Vision and Goals

Secure a product that fulfills the following minimum requirements in a secure, web-accessible environment;

- SSO - Accommodates single-sign-on to the portal, e-mail, NazNet, and Blackboard
- E-Mail - Provides a hosted e-mail solution
- Datatel – Integrates with Datatel products
- Repository – Has a central repository for user files

Additionally, the ideal product will offer the following solutions to existing problems;

Lessen the quantity of individual user passwords

24/7 access to all e-mail

Decrease the quantity of spam a user encounters

One central point of access to technology resources for the Nazareth community

And meet the following criteria;

Competitive price

User can independently change/manage their own passwords

Administered with our current staffing

Application stability (up-time)

Integrate with the Nazareth website

Nazareth College of Rochester Portal Purchase Criteria
May 24, 2006

SSO (Single-Sign-On) – Accommodate single sign on to the portal, e-mail, NazNet and Blackboard.

Equalities: Both products ultimately allow for single-sign-on to the portal, e-mail, and NazNet “out of the box”. Neither product can achieve SSO with the version and configuration of Blackboard at Nazareth. Blackboard requires a version upgrade to Blackboard Enterprise, which we are not pursuing at this time, at an additional initial cost of at least \$65K.

Basic Differences: Academus’ structure allows us to initiate and add more applications to our SSO system. With the Campus Cruiser structure, the vendor has sole control of (and responsibility for) additions to the system. Cruiser requires that each person’s username and password be the same for all applications; Academus does not.

Details

Academus uses as technology called LDAP (Lightweight Data Access Protocol) to achieve SSO. We can implement our Datatel system’s LDAP function for this (no additional cost). The existing database of users remains in Colleague and continues to originate there. This is a true SSO system in that the portal can hold multiple usernames and passwords per individual and pass them on to the appropriate application when called for. Other (3rd party) applications can be easily added as SSO as long as we have access to (i.e. own) the application.

Campus Cruiser uses a database of users within Cruiser that is a mirror (duplication) of our Datatel database and therefore does not require implementation of the LDAP service on our Datatel system. This solution is more accurately called a single username/password environment because the portal can only store and pass on one username and password for each user potentially limiting the addition of other SSO applications. Additionally, Time Cruiser Corporation, the vendor, decides which applications will be added to their SSO environment.

E-Mail Hosting – Provide a hosted e-mail application.

Equalities: Both products support a hosted integrated e-mail application solution that includes anti-virus and spam filtering.

Basic Differences: Academus’ mail application is feature rich, but a new offering by them. Campus Cruiser offers a basic web mail application with 10 years of experience.

Details

Unicon (Academus vendor) has recently (in response to our request) committed to provide Zimbra as their integrated mail client within Academus and have no customers using this configuration yet. They currently support a standard web mail application and we would be Unicon’s first Zimbra client. The Zimbra Collaboration Suite is a robust application that has functionalities (mail, calendar, contacts, and technologies) that are familiar to users of Microsoft Outlook.

Cruiser Mail is a standard web mail application with which they have much experience.

Datatel Integration – Integrate with Datatel products including WebAdvisor (NazNet).

Equalities: Both vendors are delivered the same “feed” of data from the Datatel system. Both support the upcoming R-18 Colleague release.

Basic Differences: Campus Cruiser currently uses the feed to more tightly integrate with Datatel than Academus does. Specifically, Academus confirms their capacity to populate personal

Nazareth College of Rochester Portal Purchase Criteria
May 24, 2006

calendars with “my courses” although they haven’t been asked to do so before now. The portlet architecture to support the next generation of UI is in place in Academus and will need to be developed by Cruiser.

Blackboard/CMS – See SSO section above

Central Repository – Has a central repository for file storage.

Equalities: Both products have repositories for file storage, transfer, and sharing.

Basic Differences: Academus has the capability to attach to Nazareth file servers and Cruiser does not.

E-Mail Functionality – See e-mail section above

24/7 Support – Has 24/7 support for server availability

Equalities: According to customers, both vendors provide exceptional up-time for their servers.

Basic Differences: Cruiser has a proven track record with this function; Academus has one other client that they host servers for.

Customization – Capacity for customization of the application

Basic Differences: Unicon’s primary business focus is customization, support, and consultant services. Time Cruiser Corporation’s business focus is ASP (Application Service Provider).

Details:

Unicon has been supporting and consulting with customers that are using the uPortal framework for ten years. They developed Academus, built on this open-source framework, to supply a packaged application that is functional “out of the box” and therefore simpler to implement. Additional evidence of their customization service exists in their deliberate response to our requirement of a hosted e-mail solution. The service was already being considered in their business plan. Our request prompted them to evaluate and achieve it more immediately than might have otherwise occurred.

Time Cruiser is a service provider. Campus Cruiser is delivered identically to each customer. Customizations are made universally as determined by the Corporation themselves. The application is proprietary; Customization requires vendor endorsement and intervention.

Integration of the disparate campus calendaring and scheduling tools is a major undertaking that, according to both vendors, is extremely intricate and unlikely because the technology as a whole is not yet mature enough.



MEMO TO: Information Technology Steering Committee

FROM: Portal Task Force

DATE: June 13, 2006

SUBJECT: Portal Recommendation

The Portal Task Force has chosen Academus 2.0 from Unicon, Inc. as the portal product for Nazareth College at a cost of \$89,900 for the 2006-2007 fiscal year and \$47,950 annually thereafter.

The sixteen-member Portal Task Force (PTF) of faculty, staff, and administration conducted a four-month research, interview, and demonstration process of evaluating eight portal solutions. This resulted in two finalists, Time Cruiser and Academus, being brought to campus in April, 2006. Faculty and staff attended demonstrations, interacted with the vendors, and offered valuable input to this decision. The PTF compared the two products side-by-side on specific issues that were identified as critical to Nazareth College; a hosted e-mail solution, integration with Nazareth's existing Datatel systems, single-sign-on capability with e-mail NazNet, and Blackboard, a central repository for file storage, customization and scalability, vendor support of the product, client references, and cost.

All of these criteria have been satisfied with the exception of single-sign-on to Blackboard. Blackboard, Inc. requires that customers upgrade to the newest version of Blackboard, version 7, in order to accomplish single-sign-on between Blackboard and any portal system. The associated fees (an additional \$38,800 annually) commanded by Blackboard, Inc. are the prohibitive factor to achieving single-sign-on with Blackboard at this time.

The Academus fee structure is as follows:

First Year Only Costs	
One-time setup and integration fees	19,450
Administrator training fees	4,750
E-mail conversion and administration	17,750
Year 1 Only	41,950
Annual Costs (Payable in Year 1)	
Software Licensing Fee	14,450
Portal Hosting Fee	33,500
* Annual	47,950
Total First Year Costs	<u>89,900</u>

* \$47,950 is subject to annual increases not to exceed 5%.

The work of the PTF will come to a close with an impending final proposal to the ITSC recommending the structure, membership, and strategy of a Portal Planning Committee to oversee the planning and implementation of the Portal Project.



MEMO TO: Information Technology Steering Committee

FROM: Olga Lapczak, Associate Director, ITS

DATE: September 20, 2006

SUBJECT: Portal Steering Committee Proposal
And Request for Designees

This spring, the Portal Task Force completed their duties and selected Nazareth's portal product, Academus 2.0 from Unicon, Inc. We also held discussion pertaining to the next phase of the project, structure and representation of a steering committee, which lead to this Portal Steering Committee Proposal.

This request asks the following of the ITSC.

1. To approve formation of a Steering Committee charged to set priorities and oversee the delivery of the campus-wide portal at the college. Committee proposal attached.
2. Name additional designees to the Steering Committee as outlined below and in the attached proposal.

The proposed Portal Steering Committee will be working representatives of the campus community of faculty, staff, students, alumni and prospective students.

Qualities and Skills of Steering Committee Designees

- Policy setting authority (must participate in important policy discussion and decision making)
- Portal advocate
- Communicator
- Leader
- Technological aptitude is not necessary

Expectations of the Steering Committee Designees

- Serve a term of not less than two years
- Participate in a two-day on-campus Implementation Planning Session with the Unicon project manager. Activities to include:
 - assist in setting project timeline
 - develop metrics to measure progress
 - determine portal framework (define user groups, determine content areas, define distribution methods, usability, branding, integration, pilot planning)

Portal Steering Committee Proposal

Steering Committee and Subcommittees

The charge to the Portal Steering Committee is to set priorities and oversee the delivery of the campus-wide portal at the college.

Subcommittees will be formed with each having a particular and unique goal. For example, subcommittees in areas such as Project Management; Communications; Technical; Policy; Content Management; Usability; User Training; E-mail; Web Content. The steering committee will determine the goal and membership of subcommittees.

It is suggested that the steering committee and/or subcommittees utilize focus groups throughout the process to gather input from constituents. Representatives from each user or functional subcommittee can be expected to consult with their respective constituencies as needed.

Level of Authority and Reporting

It is recommended that this core committee has Level 4 authority as outlined in the five levels of authority resource used:

The assignment of the steering committee is to solve the problem. Let the higher level authority know what you intend to do, then do it, unless the higher authority says no.

The reason for this level of authority for the steering committee is because the higher authority has respect for the team's ability and judgment, and only wants a final check before action is taken.

It is further recommended that the steering committee report to Senior Staff with information copied to ITSC. There is a sense that it is important for the President to be part of the updates and discussion of portal planning and implementation "in the same room" as the vice presidents because of its campus-wide impact on the ways communication takes place and business is done.

The membership of the steering committee needs to be representative of users: students; alumni, faculty; staff. The membership also needs to be representative of functions: information technology, communication, and information sharing.

Portal Steering Committee

- ITS - 2 representatives; Olga Lapczak, Chair/Project Sponsor and Mary Heid, Project Manager/Technical Lead
- Institutional Advancement – 2 representatives appointed by Vice President for Institutional Advancement
- Student Services – 1 representative appointed by Vice President for Student Development
- Undergraduate Admissions – 1 representative appointed by Vice President of Enrollment Management
- Administrative Computing Planning Committee – 1 representative appointed by Chair of Administrative Computing Planning Committee
- Faculty – 2 representatives (Academic Computing Planning Committee, Faculty Executive Committee, or the faculty at large) appointed by Chair of Faculty Executive Committee

Depending upon the goal/topic of a subcommittee, there can be much more representation from areas with people who are not necessarily on the steering committee. Other people will be needed as resources and for working on subcommittees.

Of Portals, Policies, and Poets

Implementing a portal provides an opportunity for collaboration, reflection, and change on campus

By Rick Bunt and Lea Pennock

When we think about better ways of doing business at a university, the spur is often some new and compelling technology. Indeed, technology offers abundant scope for radical improvement to our processes. If we simply change our processes in response to evolving technology, though, we miss a valuable opportunity to reflect on the continuing relevance of the policies behind the processes and to review and reaffirm the institutional principles they serve. Introducing a campus portal is a terrific case in point for the effect that a technology project can have as a catalyst for institutional reflection and change.

Universities and Portals

Universities are drawn to portals as an effective way of organizing and delivering campus services and information. Looney and Lyman, for example, described a portal as an epicenter of the online experience.¹ In a university environment, where the desire for local autonomy and the impetus for centralization are in constant tension, a portal seems especially appealing because it allows local solutions through a shared medium. But the very fact that a portal cuts across many sectors of the campus, delivering services and information that transcend organizational boundaries, means that implementing a portal raises important questions about jurisdiction, responsibility, and authority.

Such questions cannot and should not be addressed by the technical team. As others have noted,² a successful portal project is as much a social exercise as a technical one, and it demands wide community engagement. A portal implementation is an opportunity to bring together service providers, system developers, and user groups who might not normally work together, providing incentives for them to collaborate and to reflect on common processes and shared principles. Both this collaboration and this reflection are unanticipated but enormously valuable byproducts of a technology project.

This article arose from our experience introducing a campus portal at the University of Saskatchewan, a publicly funded research-intensive university offering a range of undergraduate, graduate, and professional programs to some 20,000 students. As our project evolved, so too did our understanding of where we needed to direct our attention. We began by conceiving the portal implementation primarily as a technology project, soon broadened our perspective to emphasize content, and then came to see that an even broader view was called for—one that acknowledged the importance of technology but placed far greater emphasis on content, community engagement, and the range of policy implications that our project exposed.

A Technology Project ...

By the spring of 2003, various constituencies around the University of Saskatchewan had been exploring the idea of a portal for several years. Considerable groundwork had been done to map out requirements and to identify potential service providers across campus, but the initiative had stalled, led as it was primarily by our IT division and other technical staff on campus. Parts of the university community were fishing for a portal implementation, but senior administration, leery of yet another costly IT project, wasn't nibbling.

All that changed in late spring when the university purchased new student and finance systems and incidentally acquired a portal product. Including the portal in the overall purchase price was justified by the promise that the new portal would serve as a common gateway, not only to the newly acquired enterprise resource planning (ERP) systems but also to a host of existing systems (a mix of vendor and home-grown applications) covering areas such as human resources, library, student computing, advancement, alumni, and e-mail. As the vehicle for single-sign-on access to the institution's various administrative systems, the portal could have been, and initially was, construed as a technical solution to the problem of providing more consistent access to multiple back-end systems.

It would take at least 18 months before our newly acquired student and finance systems could deliver services such as Web registration, electronic payment, and online access to accounts through the portal. The portal itself, though, had the capacity to provide some functionality (such as calendar and course management tools) right away, and other readily available services and sources of information—like campus news feeds and a Webcam—could easily be delivered through the portal's channels. Some “throwaway” links to our legacy student information system, such as grade reporting and online examination schedules, could be developed quickly and then replaced once we were ready to deliver our new administrative systems. It seemed a shame to leave the portal on the shelf until the new ERP systems were ready to provide full functionality. Thus we boldly decided—having signed the contract for the software in June—to bring the portal up by September, when our students returned for fall classes. This gave us two months to implement the portal. We were determined and confident we could do this if we set achievable targets.

We knew we had to work effectively to put together our project team and our governance structure, train our team members, select and organize our content, and choose the portal's name and look, all in the face of an aggressive schedule driven by the academic calendar. We had no time to secure the blessing of senior administration for this project or obtain funding for it. We knew we were taking some chances, but we had the opportunity, we had the technology, we had the desire, and we sensed a will on the part of our community. And thus,

*Acting boldly and seizing their chance,
With no promise of funds in advance,
A team of mere mortals
Unacquainted with portals
Put one in by the seats of their pants.*

It's not easy to implement a portal in two months, but it can be done if you don't try to do too much too fast. We began by focusing on services to students. Our initial plan involved delivering existing services with the new technology. When timelines are short, decisions must be made quickly, and so we created a nimble governance structure led by a four-person steering committee comprising the Associate Vice President for ICT (Bunt, also the project sponsor), the Director of Student Information Systems (Pennock at the time), the Director of IT Services, and the Manager of Student Computing (who was given the job of project manager).

As we began work that summer, it's fair to say that we still saw the project primarily as a set of technical issues to resolve—such as implementing single-sign-on access and integrating with our existing middleware technology and communications tools³—and our initial focus was on assembling the right technical resources. We knew there would be other work involved (we needed content, after all), but we didn't fully appreciate where this work would lead us. As it turned out, not until we got beyond thinking of the portal in technical terms did we realize what this project could do for us.

... But Also a Content Project

Our maturing sense of the scope and implications of launching a campus portal began with a nudge from our vendor consultants. Acting on their advice, we began to consider more carefully the broad impact that the project could have on campus. Workshops on content planning and organizational planning helped us see beyond the technical issues to the necessity for addressing things like roles, processes, layouts, and content life cycles. We began to see that implementing a portal is much more than deciding how to integrate the software with existing middleware and administrative systems. We quickly realized that just as our team needed a technical lead, it would also need a content lead—someone who would facilitate discussions about which content should be delivered in which channels, what roles should be assigned, and what the interface would look like.

In addition to our project manager, technical lead, and content lead, we pulled together a core project team consisting of a small group of technical staff, some designers and writers, a central Webmaster, and an administrative assistant. Meanwhile, we continued to nurture our communities of support through an advisory committee with broad campus representation, primarily staff members in our academic and administrative units who had functional responsibility for various services to students.

Since we had initially conceived this as a student portal, our first focus was on rolling out services to students.⁴ Serving students effectively with a centralized service in a distributed environment presupposes engaging many offices whose activities affect students. This means that these units are critically important clients as well as service providers. By engaging potential service providers early, we got them excited about the possibilities for using the portal.

Acting under budgetary and time constraints, we adopted a co-development model in which the project partnered with service providers to develop applications for our fledgling portal. In retrospect, this model paid off in unexpected ways, creating a sense of engagement and involvement that was a critical factor in campus acceptance. And we learned that to serve communities, we needed to build communities.

As Zazelenchuk and Boling pointed out, “Portal designers wrestle with presenting large quantities of information in a manner that is both organized and aesthetically appealing.”⁵ Our content lead helped us appreciate that the look and feel of the portal is not merely a cosmetic consideration but a fundamental means of gaining acceptance. We wanted a name and a look that would resonate with both users and service providers, so we took considerable care to do this right. We looked at other portals, polled segments of our community, and presented some designs for consideration. In the end we chose PAWS (Personalized Access to Web Services), a name and an image readily identified with our campus sports teams, the Huskies. The name tested well with students, and we were able to recast a well-established and readily identifiable institutional symbol.

We knew that engaging our faculty colleagues would be critical to our success, and we knew we had to work to make this happen. It was inevitable that many would resist adopting the new technology, but we counted on some keen early adopters to help us. We selected 10 faculty members to act as a pilot group for the first term. They agreed to take training in the course management toolset and to use the portal in their classes. We provided them all the support they needed, and in turn they gave us feedback on strengths and weaknesses of the technology.

Our faculty pilot added great value to the project. Not only did the participating faculty members test drive the portal for us, they also worked closely with our development team and gave us useful advice. They and their students became advocates for PAWS.

We decided early on that our September launch would be a quiet one. We didn’t want to make too many promises, and we wanted to keep user expectations in check. Better to under-promise and over-deliver than vice versa! Our first offerings would be quite limited, and we would add new services as they became available. As it turned out, this incremental approach was exactly right. Interested users found the portal, and its usage grew steadily as word spread and new services appeared. We were able to sustain this interest and build momentum before our official launch in spring 2004.

We were ready to go on September 4, 2003, in time for the start of classes. We went live with essentially out-of-the-box functionality primarily targeting students—including e-mail,⁶ a personal calendar, some collaboration tools, a few information channels, and access to online course materials—all presented through a single-sign-on, personalized, customizable interface. We had set up accounts for more than 30,000 potential users, linked the product’s course management subsystem to more than 3,000 fall term courses, and provided single-sign-on access to a variety of online library services (the library was an early and enthusiastic co-development partner).

Even though we launched with no fanfare, during our first week of operation more than 4,000 users found the link to PAWS on the university’s home page and logged in. Word started to spread, and an early fall article in the campus newspaper helped build awareness. Our focus on services to students paid off: we gave students some services they had sought, and they endorsed the new portal with enthusiastic comments and in the alacrity with which they signed on as new users. As one student wrote in an e-mail message, “[This] was my first experience with ... PAWS and I was blown away.... I feel like I have more control and can manage my entire academic career from this one site.”

Content development was a major priority through the fall and winter, along with some technical upgrades. We introduced a range of information channels, from current events to sports team schedules to weather. Temporary links to our legacy student information system enabled new services such as personalized exam schedules, grades, income tax receipts, and transcript ordering to be delivered

quickly. By spring 2004 we were ready for an official launch. More than 200 faculty and staff had taken PAWS training. We had 12,000 users, 4,000 courses, dozens of channels delivering both information and services, and 50 special-interest and administrative groups using the portal's collaboration tools. The rapid pace of adoption made it clear we had sufficient content to tempt new users.

... and Even a Policy Project

The third stage of our awareness of the scope of this technology project came early, as the project began to expose questions and issues in the realm of institutional policy. Having conquered the technological challenges and made countless operational decisions around content, we found ourselves facing more abstract questions that hinged on the nature of the portal as an agent of social and cultural change. This was a "eureka!" moment for us. In about two months we had moved from focusing on technology to focusing on content to focusing on institutional policy.

We confronted issues more far-reaching than we could reasonably expect either a technical lead or a content lead to resolve for the institution. Suddenly we were into the murky areas of authority, responsibility, privacy, and stewardship. The issues we needed to address before we could proceed clearly exceeded the authority of our advisory group and would require the attention and participation of senior administrators—associate vice presidents, deans, and directors—to resolve. In some cases the solutions would require adjustment to institutional policies. We quickly moved to set up a portal policy management committee.

Perhaps the need for a senior policy body for the portal project should have been clear from the outset, but our experience tells us that a proposal for such a thing would have fallen on deaf ears as long as the portal was still understood as a technology project. The first response from our senior administrators to an invitation to sit on such a body would have been (indeed was) to delegate participation to their technical folk. Only after the concrete reality of an installed portal forced the policy issues to the surface was there sufficient clarity to compel the attention of the policy makers on campus. It wasn't until we could come to our senior administrators with examples that the abstract considerations of portal policy became clear.

We are convinced that policy development and content development need to proceed synchronously. Without real-life examples of the issues, however, you can't win the attention of those at senior levels who need to be engaged. Policy work becomes meaningful to them only when they see concrete issues to resolve. Our project provided us with a need and an opportunity to review existing policies and processes in a number of areas, to get senior administration involved, and, where necessary, to refer back to some core principles to find a solution.

Data Ownership

Among the first issues the project uncovered were questions related to ownership of data and other content—who is responsible for collection, storage, accuracy, distribution, updating, and removal of institutional data? A good example came in the wake of our deployment of tools for course management in the portal. These tools enable students and faculty to use functionality such as file sharing, instant messaging, e-mail distribution lists, and calendaring to manage their assignments and other interactions for the particular courses they are taking or teaching.

It was a pretty straightforward matter, technically, to create course pages for each of our courses and to populate the database with the students registered in them. That information was held centrally in our student information system. More problematic was the fact that we had no central database to keep track of who was teaching each section of each course. Without that information we couldn't link faculty to their courses. The information we needed existed in electronic form, but it was maintained in many disparate local databases—in departmental offices, the exam office, the room scheduling office, the institutional planning office, and so forth. Not one of these databases was 100 percent accurate because the various sources collected their information at different times of the year, and some contained information that contradicted data held in the others.

Our need for access to this data exposed some process issues but also uncovered a policy gap. Who was the institutional authority for collecting and maintaining this information, and how was

that authority translated into reliable data? Rather than simply create yet another process and yet another data source, we addressed this issue by going back to principles (data should be captured once, at the source) and policies (department heads are responsible for assigning faculty duties). We located the authority for the information we needed (the department heads) and set up a simple mechanism for them to provide the information via a Web form. Through this we created a single, accurate data source that could be used by the various applications requiring this information, including PAWS.

A specific need of the portal had uncovered a policy gap that led us to be more intentional about assigning responsibility for data stewardship. Our simple solution to the problem revealed (but not created) by the portal replaced a series of cumbersome practices with a new, improved process. The outcome is a single data authority, complete and consistent, that everyone can use.

Eligibility for Services

Another policy issue the portal exposed was eligibility for institutional services. As at other universities, our practices for providing services to students, faculty, and staff have often grown up in an ad hoc way. Providers of every kind of service—from library cards to counseling to athletic facilities to computer lab access—made their own decisions and assumptions about who should be entitled to use the university's facilities, amenities, and offerings. The lack of consistency in this area came to the fore in the portal as we faced the need to assign each user a role and attendant services.

As we struggled to define roles and began to ask questions about eligibility for services, it became clear that, as an institution, we had vague and often contradictory definitions of student, faculty, and staff. When, we asked, does an individual become a student—on first application to the institution? On acceptance? On first registration? On first attendance? When does that relationship end—at the end of term? On graduation? During a suspension? What about students at federated or affiliated institutions? Students on internships or clinical placements? Non-credit students? And the apparently straightforward question, who are our faculty?, proved not easy to answer either. Do we include clinical supervisors? Faculty from other institutions involved in graduate supervision? Professors emeriti? Visiting scholars?

We discovered that the answers vary, depending on whom you ask. For the library, which carefully limits its patron list for reasons of adherence to licensing agreements around electronic journals, the definitions for students and faculty were very different from the ones put forward by the registrar, the faculty association, or the alumni office. Not only were the definitions inconsistent, there was no agreement on whose definition held authority. As a consequence, individuals from various groups got contradictory messages about their status as members of our community and about the amenities and services available to them.

Again, the portal did not create this confusion, but simply exposed it in a way that gave us the opportunity to go back to some first principles about who we defined as members of our community and the extent to which we as an institution wanted to ensure that they shared in our services and facilities. This led us to create a data use policy that allows us to deliver services in a more consistent way by identifying the institutional authority for data stewardship for students, faculty, staff, alumni, and retirees.

Compliance

Inconsistent local practices can also increase the institution's exposure to risk. In the highly decentralized environment that characterizes most universities, issues like appropriate release of information and protection of personal information depend on the vagaries of local appreciation for the importance of such protection. Deans, department heads, and administrative offices each take on authority and responsibility for monitoring appropriate use of local communications vehicles (Web sites, newsletters, posters in the hall) and for assuring protection of electronic and paper files containing personal information about students and faculty. When you introduce a portal into such an environment, suddenly it becomes much clearer that the institution itself is a stakeholder in, and has ultimate responsibility for, ensuring appropriate protection of privacy.

Similarly, issues relating to freedom of speech and of association come to the fore. As soon as the portal was launched and our community began to recognize its potential as a vehicle for targeting communication, special-interest groups on campus began asking to set up member groups to use the new collaboration tools. Requests came from formal and informal campus clubs, from advocacy groups, and from employee bargaining units. These requests raised important questions about the university's rights, responsibilities, and obligations to ensure that use of this technology is appropriate, consistent with our policies (if one applies), and compliant with federal and provincial law. What constitutes due diligence here, and whose responsibility is it to provide oversight and controls? To what extent is the university liable when unfortunate consequences arise from an individual's or a group's use of an institutional resource? And who can and should make all of these decisions?

The answer to the last of these questions, at least, was clear. Decisions around institutional risk must be addressed at the highest levels, not assumed by (or delegated to) "the computer people." Our portal project brought these issues to the attention of those senior administrators who needed to address them and ensured that appropriate measures were put into place both for making decisions and for educating members of the campus community about their responsibilities.

Prompting Change

The cause of progress is not always best served by clarifying or declaring an institutional policy. Sometimes what's needed is not a directive but an incentive. Champions of IT are painfully aware that despite the many compelling reasons to do so, it is always difficult for an institution to impose or enforce technology standards. Users develop powerful attachments to their personal e-mail systems or word processors and resolutely resist any attempt to move them to something else.

As we implemented our portal, we realized that for PAWS to be effective, users would need to accept change in some key areas. We needed to find the right enticement to persuade our users to adopt standard tools. As an example, we had no single, central practice for identification and authentication of users. We did have a campus-wide identifier, which all eligible users have, but it was not universally used. Various colleges and departments, and even some of our administrative units, run their own IT environments with their own local identifiers, using their own systems and processes for authentication. When we introduced the portal, we decided to accept only the campus-wide identifier as the login credential. Desire to access the functionality offered through PAWS was the incentive that the campus had lacked. While we had many calls from users who didn't know what their campus-wide identifier was (since they had never used it), we got almost no opposition to the decision to use it. Quietly, and with little push back, we achieved a centralized authentication solution. It wasn't necessary for us to write policy to force this to happen, and changing practices through use of the portal may smooth the way to the eventual introduction of new policy.

Reflecting on Policies

These examples illustrate some of the opportunities that implementing a portal can bring to a university. The project exposed a range of issues, a number of which caused us to examine core institutional principles and the policies that support them. In fact, our experience has inspired a comprehensive institutional review of policies and policy processes—a review that's presently under way.

*A portal of prize-winning quality
Is not merely techno-frivolity.
It exposes the gaps
And reveals the odd lapse
In one's own institutional polity.*

How the Campus Responded

It's been more than two years since we rolled out the portal. Our community has responded positively, and PAWS quickly became a common word on campus, demonstrating that "if you build it, they will come." Students have been enthusiastic supporters from the outset. In an interview for the student newspaper shortly after our launch, the incoming vice president of the undergraduate student society singled out PAWS as one of the best things the university was doing to help students.

PAWS has also helped us encourage faculty adoption of technology, a hitherto elusive goal. We have seen this not only in their use of the portal to access various institutional services but also in their increasing use of the course management tools, which have proven popular with students and faculty alike. As a faculty member in the history department told us,

PAWS has transformed the way I teach large introductory classes.... I can easily steer students to the ever-expanding selection of online materials provided by the library or available in the public domain.... [It] has been a valuable and liberating classroom tool.

In addition, surveys (conducted through the portal, of course) and focus groups provide valuable feedback about what users and prospective users like and don't like. Not all the feedback is supported by the facts, however. For example, focus groups told us they considered "frivolous" channels such as "joke of the day" and "word of the day" to be unwelcome distractions, yet those are the two most popular channels in PAWS. This response might simply reflect the serious nature of people inclined to attend focus groups. Perhaps the most valuable lesson is the importance of letting users customize their own layouts.

In the meantime, PAWS continues to develop, and its usage continues to grow. We now have more than 20,000 users, approximately 13,000 daily. PAWS is widely accepted as a delivery platform, and we're adding new functionality all the time as our co-development partners identify the portal as an ideal place to deliver new services. (Some recent examples include online surveys, elections, classified ads, and parking permits.)

The portal now has over 50 channels and more than 5,500 courses. Our group studio serves more than 250 groups with diverse interests, including the History Teaching Group, the Comedy Club, the Neuropsychiatry Research Units Discussion Group, the Volleyball Addicts, Students Against Global AIDS, the Campus Carpool, High-Performance Computing Researchers, the Drumming Circle, and the Medicine Class of 2008. As we bring these groups together, we are reminded of the richness and diversity of our campus community and of the fact that it takes all kinds—database administrators and graphic designers, librarians and poets—to build a portal that reflects the kind of university we aspire to be.

Concluding Remarks

Portals are a wonderful fit for universities. Like universities themselves, they participate in the tension between distributed and centralized approaches and processes, providing both a way to centralize services and a way to distribute them. A portal's approach to service delivery respects local autonomy in the realm of processes and data, and simultaneously enables institutional coordination of look and feel, presentation and style. Furthermore a portal, like a university, is all about community—both the wider community and the smaller communities that compose the whole. PAWS has helped us serve communities of users and service providers while also building and tapping in to them. The portal's tools for communication, group work, and collaboration enhance community and connect to principles of encouraging expression and dialogue and freedom of association, principles that lie at the heart of what a university is all about.

Our portal project has done a lot for our university. We expected to benefit from new functionality, and we have, but we have also benefited in ways we hadn't anticipated. Implementing our portal forced us to come together to address gaps and contradictions in policy, in authority structures, and in responsibilities by exposing and giving urgency to issues that were always there but that nobody had stepped forward to resolve or even recognized as problems. The project demonstrated that service delivery work and policy work need to be done synchronously. It also showed us that policy work becomes more meaningful when there are concrete problems to solve. In a university environment—an environment notorious for resisting change and clinging to tradition—successful introduction of new policies or new processes requires continual reference back to enduring institutional principles.

We believe that we had a richer experience and a better project because we involved so many members of our community in thinking about how a portal could help our entire campus to achieve its collective and individual goals. This project reminded us once again of the wealth of resources available at a university. Tapping into these resources can make all the difference for a campus-wide project like this, which will be most successful when your poets work hand in hand with your programmers.

Postscript

Since the portal project's tentacles touched so many different areas, many stakeholders came to the fore as it progressed. By the time of our official launch, we'd been at this for nine months, and more than 100 people had made direct and significant contributions. We wanted to thank them very publicly for making PAWS such a success, and so we threw a party at the university president's house for them. This was an opportunity to congratulate the project team and celebrate a job well done, and also a chance to let the university know that something significant had happened. Testimonials came from the president, the provost, and the vendor's vice president. Our thanks came in verse:

*You worked long days and nights without solace
To a plan that by no means was flawless.
Such a fabulous team,
You're the crème de la crème.
If it wasn't for you, we'd be PAW-less.*

Acknowledgments

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Endnotes

1. M. Looney and P. Lyman, "Portals in Higher Education," *EDUCAUSE Review*, Vol. 35, No. 4, July/August 2000, p. 30, <<http://www.educause.edu/apps/er/erm00/articles004/looney.pdf>>.
2. K. C. Green, "Tracking the Progress of Portals and Web-Based Services" (Boulder, Colo.: EDUCAUSE Center for Applied Research, Research Bulletin, Issue 8, 2003), p. 2, <<http://www.educause.edu/LibraryDetailPage/666?ID=ERB0308>>; and Looney and Lyman, op. cit., p. 33.
3. Good descriptions of the technical work required to install a portal are provided by C. G. Connolly, "From Static Web Site to Portal," *EDUCAUSE Quarterly*, Vol. 23, No. 2, 2000, pp. 39–43, <<http://www.educause.edu/ir/library/pdf/eq/a002/eqm0024.pdf>>; and by R. R. Ethridge, C. M. Hadden, and M. P. Smith, "Building a Personalized Education Portal," *EDUCAUSE Quarterly*, Vol. 23, No. 3, 2000, pp. 12–19, <<http://www.educause.edu/ir/library/pdf/eq/a003/eqm0031.pdf>>.
4. Green, op. cit., provides a good list of typical services on p. 7.
5. See T. W. Zazelenchuk and E. Boling, "Considering User Satisfaction in Designing Web-Based Portals," *EDUCAUSE Quarterly*, Vol. 26, No. 1, 2003, p. 38, <<http://www.educause.edu/ir/library/pdf/eqm0315.pdf>>.
6. All students already had campus e-mail accounts, but many were using other service providers such as Yahoo or Hotmail. We hoped that the single-sign-on functionality of PAWS would provide them with incentive to use their campus accounts.

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