

Some perspectives on uPortal: A Response to Aren Cambre

On Thursday March 8 Aren Cambre, Southern Methodist University, wrote on the EDUCAUSE Portals list:

A few years ago (2008ish?), I reviewed portal solutions for a possible purchase, and I also attended three of the Gettysburg College portal conferences.

I did not get a good feeling about uPortal, especially when comparing it to competitors.

Has uPortal improved in the past few years? If you use uPortal now and had to do it all over again, would you still choose it?

On the following day, Tim Carroll, University of Illinois and Jasig Treasurer, provided a brief summary of the recent improvements to uPortal functionality and references to JASIG materials on uPortal and uMobile [www.jasig.org].

A copy of their messages is attached.

Larger Context

The development of uPortal is primarily a U.S. effort. University of Wisconsin's Jim Helwig and Eric Dalquist lead

Because there are more uPortal implementations outside the U.S., it is useful to consider these implementations as well. EUNIS [www.eunis.org] conference materials may be helpful.

The largest and most successful implementations are in France where uPortal is dominant in tertiary education. uPortal and CAS (Central Authentication Service [<http://www.jasig.org/cas>], developed at Yale University) is now implemented in about 200 universities, schools, and agencies in France. Their focus has been service to students; uPortal has been integrated with Moodle and Sakai learning systems. They have developed and implemented a help desk solution—primarily to improve support services for students. This software was developed by Pascal Aubry at the University of Rennes 1 and Alexandre Boisseau at the University of Brest [<http://perso.univ-rennes1.fr/pascal.aubry/node/38>]. The ESUP Consortium has also implemented Internet 2's Grouper to provide role-based security and provided an effective user interface [<http://www.esup-portail.org/display/ESCOGROUPER/Home>]. (Grouper development is led by Tom Barton at the University of Chicago [<http://www.internet2.edu/grouper/>]).

Alain Mayeur, CIO at the Université de Valenciennes [www.univ-valenciennes.fr], was the founding lead for the ESUP Portail consortium. It was established in June of 2004. Doriane Dusart and Raymond Bourges, University of Rennes 1 prepared the implementation plan [http://www.immagic.com/eLibrary/ARCHIVES/GENERAL/ESUP_FR/E040624B.pdf]. ESUP Portail holds regional conferences on implementation three or four times a year with more than one hundred attending [<http://www.esup-portail.org/display/ESUP/Bienvenue+sur+le+site+du+consortium+ESUP-Portail+!>].

About two years ago the French research universities established a national effort to create Virtual Research Environments (VRE). This VRE is based on the enterprise-level implementations of uPorta/CAS/Grouper with D-Space and Fedora (now Duraspace). Web Services are used to provide inter-university access to faculty publications and research data from the national Duraspace environment. The VREs are also connected to the Ministère de l'Enseignement Supérieur et de la Recherche [<http://www.enseignementsup-recherche.gouv.fr/>] for direct coordination..

The ESUP Portail effort was aware of earlier work by Jasig UK [wiki.jasig.org/display/UK/Home], especially the early work of the University of Hull and Oxford University. Because of these software development efforts, ESUP Portail focused on integration and implementation rather than software development.

From the perspective of students and faculty, no other country, including the U.S., has such a cost-effective implementation of enterprise software specifically for higher education.

Security

Federated security is imperative for research faculty since most research is done by “teams” including faculty in other countries. Implementation of federated security may also be needed to comply with the U.S. Department of Education’s Federal Student Aid security requirements as described by their briefing last week. There is a meeting at the National Institute of Standards and Technology this week that should answer some unresolved interpretations which may require upgrading IT infrastructure. (im+m will provide notes from both meetings).

uPortal was designed to satisfy that requirement. At Quali Days 2011 the Foundation reported 67% of the 323 respondents selected identifier authentication, group, role access permission privilege and attribute management as their first priority for further development of identity management and security. Because of the specific needs of higher education and research laboratories, this will likely be a community source effort similar to Quali Rice projects rather than an extension to commercial portals..

Diverse authority over content

Industry typically identifies managers for specific content areas of portals. Higher education has more complex requirements. Columbia and later Virginia Tech universities found the need for immediate pre-emption of the key area of a portal display during emergencies. Schools and departments want to use the portal for announcements, often to selected groups, at a pre-empted area of the portal display. The uPortal design has attempted to accommodate these unique requirements.

Remote content

Industry typically runs their portal from a central site or connected sites with the content equally available to all locations. Higher education has the need to display content from other sources. Students and faculty individually may select content from publishers (journals and their indices), learning service providers, and in real-time conferences and other meetings. This content must be secured and the authorization to access may need to be provided.

Comparing uPortal and others

The “best” portal depends upon the industry. When uPortal was first developed there was direct communication with the two portal companies—later acquired—that dominated first the automotive and subsequently the financial industry. The primary portal in use today is Microsoft’s Sharepoint. It serves an information dissemination role as the early portals disseminated information for the automotive industry.

Education and the financial industries share a need for a high level of security; both are regulated by federal departments and agencies. Other industries need not provide that level of security for most of their content.

As university IT systems increasingly are central to student learning and university research, the difference between uPortal and other portals will become more evident both for the learning and research environment a portal should support and the functions it should provide.

uPortal has been used by such diverse organizations as the Washington Post and schools in California, but it is likely uPortal will continue to evolve serving higher education.

Subsequently Aren Cambre said uPortal “had a reputation for being unusually hard to implement.” When you ask a portal implementation to support diverse, hierarchical and remote content in the portal implementation, to accommodate a diffused organization, to begin to implement federated authentication and authorization, and to be architecturally consistent with other education-specific applications such as learning systems, implementation tends to be more difficult, but not necessarily more expensive than portals developed for other industries.

Subject: Re: [PORTALS] uPortal: how's it doing?
From: "Cambre, Aren" <acambre@MAIL.SMU.EDU>
Date: 3/9/2012 9:20 PM
To: PORTALS@LISTSERV.EDUCAUSE.EDU

Thanks!

One more thing: a few years ago, uPortal had a reputation of being unusually hard to implement and keep going. I got this from paid reviews and colleagues at other schools.

Has the TCO been meaningfully reduced with recent improvements?

Aren

From: The EDUCAUSE Web Portals Constituent Group Listserv [mailto:PORTALS@LISTSERV.EDUCAUSE.EDU] **On Behalf Of** Carroll, Tim
Sent: Friday, March 09, 2012 6:21 PM
To: PORTALS@LISTSERV.EDUCAUSE.EDU
Subject: Re: [PORTALS] uPortal: how's it doing?

Actually Yes! There has been some really cool activity going on in the uPortal community. Since you last evaluated, they have release uPortal version 4, as well as uMobile version 1.

From the end-user perspective, uPortal has evolved dramatically. The general navigation and customization, as well as the administrative features have all been redesigned by professionals in usability and accessibility. There are also a number of exciting new features and applications added by the growing portal/portlet developer community, including mobile support, announcements app, news reader app, integrated searching, stats reporting, email app, calendar app, LMS integration, the list goes on.

Under the covers, the internal APIs have been rewritten using modern best practices, adding support for things like Grouper and Shibboleth, as well as making it much easier to deploy, administer, and maintain.

And finally, the out-of-box uMobile support is a big bonus in today's push to go mobile. The built-in uMobile service gives you NATIVE mobile device support for delivering all the portlet apps to the iPhone and Android platforms without writing all the additional code.

You can find some additional information here:

uPortal - <http://www.jasig.org/uportal-4-0-announcement>
uMobile - <http://www.jasig.org/umobile>

Hope this helps, Tim

On Mar 8, 2012, at 3:19 PM, Cambre, Aren wrote:

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Aren Cambre, '99, '03

<image001.gif>

Team Lead, Web Technologies Team
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Subject: [PORTALS] Some perspectives on uPortal: A Response to Aren Cambre
From: Jim Farmer <jxf@IMMAGIC.COM>
Date: 3/12/2012 1:37 PM
To: PORTALS@LISTSERV.EDUCAUSE.EDU

Last week Aren Cambre asked about uPortal. Tim Carroll, Jasig Board Treasurer, summarized recent developments.

uPortal has been implemented more frequently outside the U.S. and has features which may be needed in the U.S.

Because of its length, a response to Aren can be found at:

<http://www.immagic.com/eLibrary/ARCHIVES/GENERAL/IMM/I120311F.pdf>

I hope this adds to Aren's useful initiation of the discussion.

jim farmer

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