

## Deputy Provost and Information Officer

### University Portal Project

The McGill Enterprise Portal will help McGill people pursue academic, administrative, professional and community objectives by reducing barriers to information, services, resources and to other McGill people.

The portal will present current McGill people a view of the University based on the individual's identity, role, preference and function. This virtual environment will guide McGill people through self-service functions to administer routine tasks, help them find relevant information, services, processes, advice, training and resources, and connect them with other McGill people.

The portal will provide new McGill people a single place to conduct most University business. New administrative staff will become productive more quickly, while new scholars and researchers will have more time for pursuing their academic, professional and community interests.

The portal will provide prospective McGill people a friendly introduction to the University's academics, services, community and administration, and will help them find relevant information and resources.

The portal environment will adapt to McGill people's changing and possibly concurrent roles as they transition from prospective student, to enrolled student, to involved alumna, to productive employee, to community participant, to generous donor, to active retiree.

The portal will enable McGill people to see their view of McGill through a Web browser anywhere Internet connectivity is available.

The portal will simplify access to McGill IST infrastructure by serving as a single, secure and user-friendly point of entry into and exit from multiple information systems and technologies, streamlining access to structured and unstructured data, tightening enterprise system and data security, reducing redundant content, and leveraging experience in developing the Gateway system.

## **Objectives for McGill enterprise web portal**

The McGill Enterprise Web Portal will consolidate, personalise and customise the view of McGill's resources and services to prospective, new and experienced McGill people.

The portal's web-based architecture, designed around business needs and user preferences, will diminish common barriers to productivity while improving the quality of people's experiences at McGill. The portal design will be based on known and anticipated administrative tasks and information, and provide one virtual workplace to access these tools and information.

The Portal will promote community interaction and communication by presenting a view of the community relevant to the user.

The Portal will capitalize on the best of de-centralization by delegating the creation and management of content and control of work flow functions to McGill faculties and administrative units, while promoting and enforcing standards for authoritative data and content.

By effectively leveraging the Banner/Minerva ERP system, the forthcoming enterprise identity management system and the experience gained from the implementation and maintenance of the McGill Gateway System, the Portal will address a number of user needs summarized below.

## **The portal will benefit experienced McGill people by:**

1. Providing a single entry point to relevant McGill systems
2. Providing a single point of exit from relevant McGill systems
3. Seamlessly authenticating to all relevant McGill systems
4. Providing a single place to conduct most University business
5. Reducing administrative barriers to information and resources through self-service
6. Automating routine work functions
7. Increasing productivity
8. Delegating authorization access to all relevant content within those systems
9. Anticipating the needs of authenticated users based on their identity and roles
10. Anticipating the needs of non-authenticated users based on analysis of usage patterns
11. Anticipating the needs of non-authenticated users based on analysis of user feedback
12. Improving communication by providing an effective resource for targeting University information only to those with the desire or need to know
13. Providing consistent and intuitive global navigation through all public and private sections of the portal
14. Enabling easy access to relevant Libraries resources
15. Presenting a view of McGill customized to the user's identity and role(s)
16. Automatically updating the user's view of McGill as his or her McGill role changes
17. Enabling McGill people to personalize presentation, organization and content of their view of McGill
18. Providing easy access and user-friendly presentation of relevant Banner data
19. Drawing attention to and explaining today's University events, such as, Why is the McGill flag at half-mast today? What is going on in that noisy tent next to the Three Bares? Why are people demonstrating outside the Administration Building? Why are the Roddick and Milton Gates closed today? Why are there no classes today? Why am I the only person on campus today?
20. Providing the option for seamless access to information from external channels and organizations
21. Facilitating service requests (network jacks, phones, parking permits, network access, conference rooms, AV or computer rentals)
22. Promoting McGill events (e.g., music or athletic events) and selling tickets online securely
23. Enabling access to relevant corporate data and University Archives holdings.

## **The portal will benefit new McGill people by:**

1. Guiding new McGill people's transition from the public view of McGill to their own customized, personalized views and experiences
2. Easing the new student's transition to established student to alumna
3. Providing incoming students a single place to find pertinent information, services, register for classes, find housing, food, friends, ancillary services, medical care, participate in sports, music, arts, and the University community
4. Facilitating the new student's interaction with the Minerva Student Information System
5. Providing advice on routine administrative tasks associated with entry into the McGill community
6. Facilitating access to McGill Libraries, research and academic resources
7. Enabling access to relevant corporate data and University Archives holdings.
8. Easing new employees' transitions into their changing roles at McGill
9. Deliver targeted announcements and notices of administrative requirements, advice on relevant resources and procedures
10. Anticipating and adapting to the functional needs and interests of new McGill people based on analysis of usage patterns and systematic solicitation of user feedback
11. Providing easy access to general information about McGill by means of consistent presentation of global navigation tools

## **The portal will benefit prospective McGill people by:**

1. Easing the prospective student's transition to accepted student, to confirmed and then enrolled student by facilitating interaction with Admissions and Recruitment; providing a single point of entry to a prospect management system
2. Presenting a public view of McGill that anticipates and meets newcomers' needs for McGill information, services, resources and guidance.
3. Serving as a virtual welcome to McGill from the University Principal
4. Promoting easy access to information about how to join and get involved in the McGill community (by becoming a student, a student's parent, an employee, an active alum, a generous donor, an events participant, or an involved member of the McGill community)
5. Highlighting evidence of McGill's excellence as an institution
6. Highlighting Montreal as a great city to live
7. Promoting McGill's public service activities
8. Presenting a simple, user-friendly, adaptive, intuitive and easy to navigate public view of the University.

## **The portal will advance McGill IST infrastructure by:**

1. Extending McGill's investment in the Banner/Minerva ERP system
2. Leveraging McGill's enterprise identity management initiative
3. Providing a scalable Web architecture and framework capable of accommodating enterprise and IST growth
4. Increasing awareness about relevant McGill information systems
5. Increasing usage of McGill's central Web resources
6. Reducing access barriers to McGill information systems and technology
7. Reducing the need for user training, documentation and support for disparate systems
8. Offering administrative units incentive to embrace centralized IST services
9. Serving as a challenging project in which all IST units can take part
10. Advancing McGill's IST employees' technical skills and competencies
11. Encouraging user-centered system design to IST and hopefully the enterprise
12. Improving IST employee productivity and satisfaction by providing a usable interface for performing Portal administrative functions
13. Affording stakeholders an opportunity to participate in building a system that will help improve their experiences at McGill and develop a sense of ownership in central administration's initiatives
14. Improving content providers' productivity and satisfaction by providing a user-task oriented interface for creating and managing content
15. Improving IST interface to McGill people by tracking Web usage internal to McGill for performance data and usability analysis
16. Improving IST employee productivity by means of user-friendly administrative functions and interfaces
17. Reducing certain costs of managing an IST infrastructure
18. Providing multimedia access to content through mobile computing devices, such as PDAs and voice-based interfaces.

## **The portal will benefit the University by:**

1. Improving peoples' experience at McGill as their roles change
2. Diminishing the perception of the University as bureaucratic and unfriendly to its constituents
3. Increasing employee productivity by providing a single place to conduct business
4. Reducing the costs of further development and maintenance of disparate web-based information systems and resources
5. Reducing certain costs of managing a University infrastructure by providing self-service functionality

## Results of the McGill Web Usage Survey

The following portal functionality priorities were inferred from the results of a survey on McGill Gateway System usage, conducted by the SC-IST Standing Committee on the Web in May, August and September of 2002. This non-randomized, targeted and self-selected survey was completed by 1,600 respondents who were motivated to use the McGill Gateway System toward a specific goal.

### Student portal priorities:

1. The portal should allow single sign-on access to multiple online systems.
2. The portal should allow students to post announcements, messages, hold discussions and generally communicate with each other.
3. The portal should allow students to post contact information about themselves in a student directory.

### Faculty and staff portal priorities:

1. The portal should allow staff to easily search for information on McGill web pages.
2. The portal's single sign-on feature should permit connections to remote and local networks on campus.
3. The portal should provide personalized access to a number of information resources and services, such as knowledge management, research assistance, library resources and services.
4. The portal should include community building features such as contact lists, alumni directories and career mentoring opportunities.

### External portal priorities:

1. The portal should include information and services tailored specifically for parents.
2. The portal should make it easier for external users to communicate with the University.
3. The portal should provide features that allow alumni to keep in contact not only with the University but with each other.



## Product Selection Process Summary

The following points outline the selection process used by McGill University to select a vendor for the portal implementation project. A highly consultative and inclusive approach was used where selection criteria were determined both from the community feedback and from the technical analyses of the vendor products.

- In May 2003, McGill issued a request for proposals (RFP) to prospective software vendors, and received 12 bids.
- In the fall of 2003, a subset of these vendors, as well as representatives from universities that have implemented an open source portal (uPortal), were invited to present their products to a group of McGill faculty, staff and student evaluators.
- Following each presentation, the evaluators provided structured feedback to the Portal Executive Committee and the Deputy Provost and CIO, and a technical evaluation summary was produced.
- A qualitative questionnaire was conducted with a group of McGill faculty, staff and student evaluators.
- During the fall of 2004, a survey of 16 universities was conducted consisting of interviews and e-mail exchanges to get feedback on their experience with the portal product vendors, and to learn their portal implementation strategies.
- Based on the RFP results and the survey a recommended vendor shortlist for continued evaluation was approved by the Deputy Provost and CIO.
- In the fall of 2004, an independent consultant conducted a comparative analysis of the technology used by the vendors on the shortlist, which included an estimate of the effort required to implement a portal pilot using the vendor's product. Independently, a technical expert from each vendor was also asked to produce an estimate. Vendor and consultant estimates were reconciled and a final report was produced. Approximately, thirty-seven reference documents (equivalent to 90 MB of data) were researched in the production of this report.
- In the fall of 2004, web conferences were held with CampusEAI to review their implementations at other universities. These included live demonstrations of Oracle portlets working with Banner ERP implementations.
- A presentation was given to the Deputy Provost and CIO and the McGill IST Directors summarizing the evaluation of the short list of vendors.
- Oracle was selected as the vendor by the Deputy Provost and CIO and the McGill IST Directors on January 25, 2005.
- An agreement was signed with CampusEAI on February 22, 2005.
- A presentation on product selection was made to university evaluators on April 4, 2005 at the Faculty Club.
- A presentation to Deans was made on April 27th, 2005.