

"Thinking Big" Creating usable enterprise portals

or
"Portal Schmortal"

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The University of Edinburgh

Who are we?

- The University of Edinburgh
- Management Information Services (MIS)
- Customer Services Group



What Are We Going to Talk About?

- A little bit about University of Edinburgh culture
- A little bit about usability in Higher Education
- Portal flavours – and which flavour we use
- Our enterprise portal project (staff)
- Future plans

Enterprise Portals – a Cautionary Note!

- **Enterprise Portal Projects:**
 - Scale is enormous
 - Scope can feel unlimited
- **You need:**
 - A clear, strong vision
 - High level buy-in
 - Good governance
 - A prioritised plan



University of Edinburgh Culture

- Highly devolved
- Local ownership vs. centralisation
- Breadth, diversity and variety important
- Most diverse user community imaginable!
- Getting consensus like herding cats...



HE Usability Climate

- At a crossroads
- Major legislative change
 - SENDA in effect from Sept 2002
 - Modifies the DDA to include FE / HE
- Funding issues
- Growing recognition for usability
 - Legal requirement
 - Right thing to do
 - Efficient / cost-saving

What is a Portal Anyway?

" A thin layer which aggregates, integrates, personalises and presents information, transactions and applications to the user according to their role and preferences "

(JISC)

Portals vs Websites

- Aggregating content *and* applications
- More 'intelligent'
 - Leveraging corporate data to push content
 - Allowing end-user customisation (content, navigation and layout)
- Framework for secure access to services (SSO/RSO)
- Portals are more than the sum of their parts
- Move towards a 'webtop'

Portal Usability Benefits

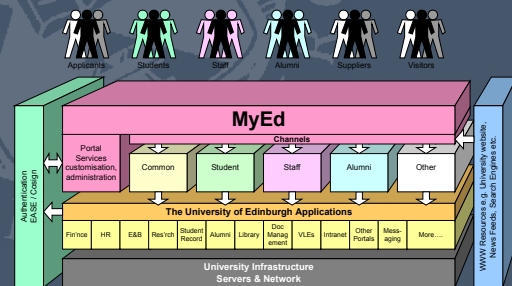
- **Shamelessly taken from Nielsen:**
 - Single gateway to all corporate information and services
 - Consistent look and feel
 - Integrated services
 - Personalised 'snippets'
 - Reduce need to move around / more efficient working environment
 - Unified security environment..single sign-on. (the holy grail)
 - Reduced duplication of effort



Our Flavour of Portal

- **Thin Portal**
 - Large number of legacy applications
 - Imperfect but mature interfaces
 - Limited screen real estate
 - Politics of content ownership
- **Portals = 1/3 technology, 2/3 politics (Nielsen again)**

The Portal Vision



Our Portal Project

- Usability on agenda, but not core methodology
- Political resistance to portals
- Used what we already had
 - » Management information
 - » Service information
- Built tools
 - » Customisation
 - » Content / Search
 - » Communication
- 'Dirty' prototyping
- Accessibility Awareness
- Ran a Pilot
- Publicity Campaign

Using What we Already Have

- Management Information
 - Pushed vs. Pulled Content
 - » Criteria for inclusion based on existing system usage stats
 - Consulted with other service providers
 - » content
 - » taxonomy
 - » navigation
- Service Information
 - Standard Help Information
 - System Experts / Added Value Information

Building Tools

Customisation

- Skins
- Layout Manager
- Reset Layout
- Demo User

Content / Search

- Catalogue

Communication

- Announcements
- Report a Problem
- Feedback

'Dirty' Prototyping

Mocked up channels and demoed them

- Screen real estate limitations
- Information overload!
- Helped visualise and crystallise the portal vision – people began to get it!
- Good buy-in and draw people's fire

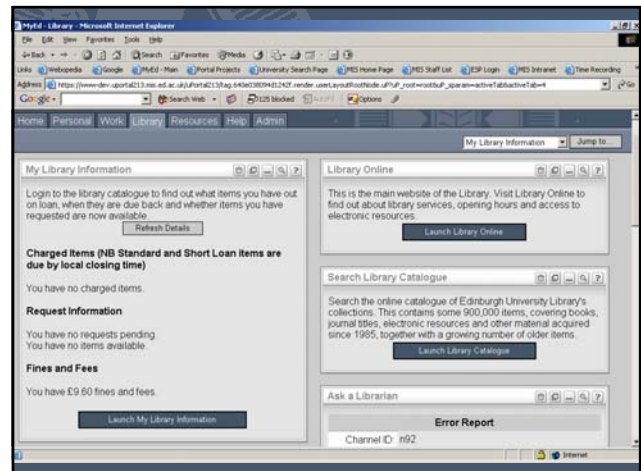
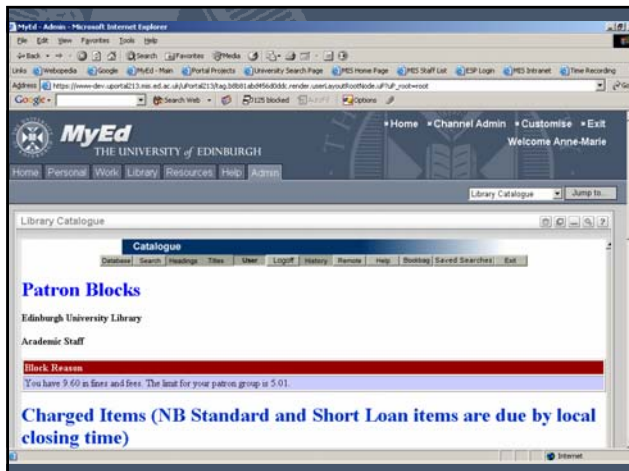
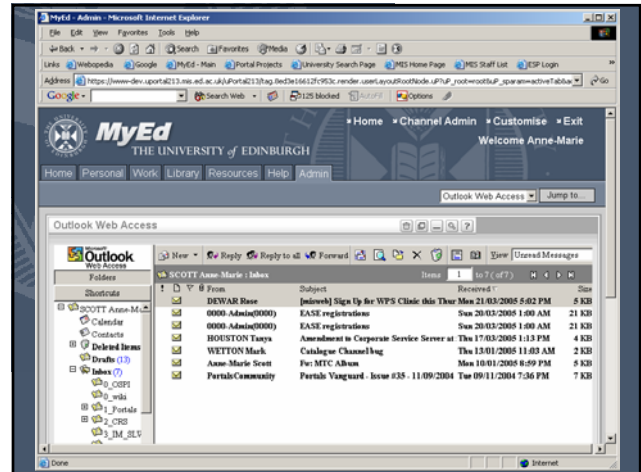
'Dirty' Prototyping

Key Outcomes

- Identify business critical systems
- Identify critical information
- Identify where we need only to provide a gateway
- Develop a standard metaphor and guidelines

Portal can act as a lever for improving usability as a whole:

- Consistency across systems
- Taxonomy
- Jargon etc



Accessibility Awareness

- Nested-Divs theme from uPortal community
- Tested with Homepage Reader, Jaws, Dragon Naturally Speaking
- Different skins
- Graceful degradation
- Accessibility audits by other support staff (Computing Services and Disability Office)

Pilot Phase

- Not focused upon specific task completion, but higher level EASE OF USE:
 - Registration, navigation, help provision, performance/reliability
- Pilot - May 2004
 - 101 out of 180 responded from broad sample.
 - 73 - 79% found registration/logon easy.
 - 86 - 92% found service fast and robust
 - 45% found it easy to navigate
- Main outcomes were to conduct a more formal usability study and provide more 'sticky' content.

Publicity Campaign

- Pilot involvement and results helped engagement
- Presentations to 'movers and shakers' highlighted misconceptions
- Awareness campaign focused on core content/functions + benefits
 - 'Making life easier'
- Launch publicity varied and involving presentations to all staff

Lessons Learned

- Product selection - money and politics, usability was secondary
- More work required re: web, portal and content management relationships
- Core software constraints:
 - Open source inherently flexible
 - Package more immediate but more constraining?
- Understand technology options in terms of user impact - e.g. SSO and upgrades
- Guiding principles useful to drive flavour from inception
- Pre-login page has proven useful
- Easy wins in central communication dissemination
 - e.g. RSS
- Expert accessibility tests difficult to resource
- Senior executive backing essential - single steering group inadequate

Future Plans

- Usability study in progress
- Student migration to MyEd in progress
- Web integration project initiated
- Microsoft application integration?
- **Content, content and content**
 - Stickiness via portal only access to applications and portal owned applications.
- **Core software upgrade – aggregated layouts**
- **Demand for delivery rapidly increasing**
 - Department communications
 - Voting and questionnaire tools
 - ePortfolios and course management
- **MyEd to become the main web gateway to UoE**

Questions?

- Demo @ <https://www.myed.ed.ac.uk>