

# Drake Draft Portal Policies

Ver 2.5 amended by Paul Morris, 10/25/06

Ver 2.2 approved by DAITE, 9/29/06

Some of this material has been adapted from the Georgia Institute of Technology's policies.

## 1. POLICY

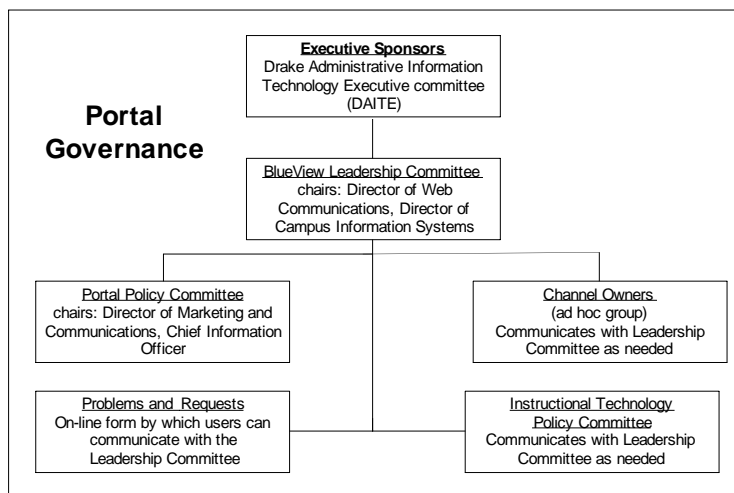
“BlueView”, the name we have given to the Drake portal, is an official Drake resource. All authorized users must abide by applicable Drake policies and guidelines, inc. the Acceptable Use Policies for students (<http://www.drake.edu/dos/handbook-old/appendixc.php>) and faculty and staff (<http://www.drake.edu/it/help/documents/Fac-Staf10-07-2005.pdf>). Failure to comply with approved policies can result in the loss of BlueView access, computing privileges, and enforcement of appropriate disciplinary procedures as well as applicable criminal and civil penalties.

All users must in addition abide by the policies described in this document.

## 2. PORTAL GOVERNANCE

BlueView is a strategic Drake resource that is not “owned” by any single department. As such, roles, duties and accountability are spread across the university.

- a. Drake Administrative Information Technology Executive committee (DAITE) provides executive sponsorship. It approves funds for new initiatives, although the funds will be provided (or not) as part of Drake's budgeting process.
- b. The BlueView Leadership Committee implements, supports, and nurtures the Portal initiative. It sets policies, guides the implementation and on-going development efforts, and identifies and prioritizes new functionality.
- c. Members will be the Tab Owners (see Section 4) or their designee, a representative from each school and college, and a representative from the Library.



- d. The Committee will be led by two Portal Stewards who are responsible for on-going operation of the program. The Portal Stewards are the Director of Campus Information and the Director of Web Communications.
- e. There will be an ad hoc working group for channel owners (Section 5) to discuss issues which affect them. Channel owners will provide input to the Committee via the Portal Stewards, or any other members of the Committee.

### 3. USER ACCESS

- a. BlueView is a conduit to facilitate easy access to a variety of university information services and resources. BlueView accounts are created automatically for users in the Drake Community, both on- and off-campus. Accounts are created and administered by the Office of Information Technology (OIT).
- b. The User roles<sup>1</sup> available at present are: Student, Faculty, Employee and Alumni, plus *twelve roles, one each for Employees (Faculty and Staff) and for Students, in each of the six schools/colleges.*
- c. Members of the Drake community with a DUSIS (Banner) will be able to access BlueView via a Login on the Drake Home Page. Their login is associated with their particular role(s), and while accessing BlueView, users will exercise privileges assigned to their user role(s). It is not acceptable for any individual to circumvent or attempt to obtain access to services or information not appropriate to one's authorized role.
- d. Different groups of users will have different levels of access. The Portal Stewards are responsible for defining the structure and characteristics of these groups with appropriate guidance from the BlueView Leadership Committee. The Stewards will fully document the necessary processes for assigning appropriate levels of access to users: account creation, default role assignment, change in status, deactivation, and deletion.
- e. A user can have multiple roles. For example, a user could be a faculty member and a BlueView Group Administrator. This would mean that the user account is affiliated with the appropriate roles in Banner. Users must submit a change request through the OIT Help Desk when the need arises for a role change. Such requests will be routed to the BlueView Leadership Committee for action. An example of a situation requiring a change in access privileges would be a user who changes position or department, or a student who graduates.
- f. Future role definitions will be defined and assigned by the BlueView Leadership Committee after verification of appropriate need and approval by the Portal Stewards.
- g. BlueView is an information gateway providing Single Sign-on to many web-based systems. Systems not accessible through non-BlueView will require their own unique user authorization and authentication protocols, usually in the form of a specific user id and password. Usage and access policies for these systems along with their support services exist outside the supported BlueView environment. Details on the policies, procedures, and support structures of these systems are to be found in the policies governing those systems.

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<sup>1</sup> There are also administrative roles within BlueView such as Content Creator and Channel Owner, described below.

- h. BlueView accounts will be terminated in accordance with existing policies and procedures for account termination. Users with special circumstances are responsible for contacting the Portal Stewards prior to a change in status to avoid automatic account termination. The Portal Stewards will evaluate the situation and make a decision as to the appropriate access.

**4. PORTAL ROLES AND TABS**

- a. Anyone with an active Banner ID can be assigned to one or more of the roles described in Section 3c.
- b. All users will see icons for MyDUSIS, BlackBoard, Webmail (Section 6), Calendar (Section 7) and Groups (Section 8) at the top of the screen.
- c. Below the row of icons are Tabs. People see tabs appropriate to their role. Clicking on a tab brings a set of channels (Section 5) to the screen.
- d. All users will see a Guide (help) tab and a Library tab, and all except Alumni will see their *Home* tab. The other tabs they see depend on their role:

<b>Role</b>	<b>Tabs Seen</b>
Faculty	Faculty, <a href="#">Employee</a> , Student Academic
Students	Student Academic + Campus Life
Staff	<a href="#">Employee</a>
Alumni	Alumni, Alumni News
Faculty who are also Alumni	<a href="#">All tabs seen by Faculty + Alumni</a> , Alumni News
Staff who are also Alumni	<a href="#">All tabs seen by Staff + Alumni</a> , Alumni News
Students who are also Alumni	All Student + Alumni, Alumni News

- e. Each of the tabs will have a formal Tab Owner (see table below). The Owner (or their delegate) has final control over the channels that appear under that tab. On routine matters, the Portal Stewards and the BlueView Leadership Committee will make recommendations about the channels on each page, after appropriate discussions.
- f. Most pages will have channels from a variety of organizational sources.

<b>Tab</b>	<b>Tab Owner</b>
<a href="#">Home</a>	Director, Marketing & Communications
Student: academic	Vice Provost
Student: campus life	Dean of Students
Faculty	Associate Provost
Employee	Director, Human Resources
Alumni	Director, Parent & Alumni Programs
Libraries	Dean of Cowles
Guide (help)	Director, Campus Information Systems, Director of Web Communications
DUSIS	Director, Campus Information Systems

- g. The DUSIS tab is for users of the full DUSIS system. The great majority of people will use the subset of functions known as MyDUSIS, accessed via an icon.
- h. New tabs must be approved by the BlueView Leadership Committee, and created by the Portal Stewards using the style guidelines approved by the Portal Policy Committee.

## 5. CHANNELS

- a. A portal channel is a customizable method for publishing information to a tab, which takes the form of a rectangular box on the tab.
- b. *Some channels are “fully” locked and cannot be moved. Some are “locked” and can be repositioned on the tab by the user, but cannot be removed from the tab. “Optional” tabs can be repositioned on the tab, or removed entirely.*
- c. Optional channels available to a particular role can be selected by the user from the approved list available on the Guide tab.
- d. Those seeking a new channel must submit an on-line Channel Request Form<sup>2</sup>. This form will require the following information (and other information as needed): Channel Owner, requestor name (if different), channel name, intended audience and the roles to which it should be available.
- e. The channel owner should also request that their channel be “fully locked” (cannot be moved on the tab or removed), “locked” (cannot be removed from the tab but can be moved on it) or “optional” (can be moved and removed).
- f. Requests will be reviewed by the Portal Stewards and the BlueView Leadership Committee. The owner of the tab(s) on which the channel will appear will be consulted. The Committee will then approve or disapprove the channel, the tab(s) on which it may appear, and whether its “lock” status. Decisions and rationale will be communicated back to the requestor.
- g. Approved channels are not to be modified in scope or intent from the original authorization. Since any changes to the channel can impact Portal performance, any modifications to the channel must be approved and tested prior to publishing.
- h. Once a channel has been approved and developed, others wishing to be Content Creators for that channel must obtain the approval of the Channel Owner, and their material must be consistent with the intent and scope of original Channel Request Form. All content creators must follow the procedures developed by the Portal Stewards for publishing to a channel.
- i. All channel owners are responsible for the content published within their channel and must comply with all applicable policies.
- j. Channels that are not effectively maintained or are in violation of policies will be subject to removal. Any complaints about channel content which are received from Tab owners, those enforcing Drake policies, or any user will be reviewed by the Portal Stewards. If mutual resolution of the complaint is not possible, the Portal Stewards may recommend to the Leadership Committee that the channel be terminated. The Leadership Committee makes the final decision.
- k. The Portal Stewards will maintain the list of approved channels on the Guide tab, and communicate the creation of new channels to users with the relevant roles.

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<sup>2</sup> They are strongly encouraged to discuss channel creation issues with the Portal Stewards prior to submitting their Channel Request Form

## 6. E-MAIL

- a. The email client used within the portal at launch will be Drake's current web mail. This runs within a channel, and so users can see the headings of new messages. This client must be used for sending messages using the Groups function (Section 8). As the portal evolves, other web clients will be considered.
- b. New email messages will appear through a channel on the Welcome tab, and an email icon on every page will allow users full access to the web mail client.
- c. Users who use other mail clients (e.g. Eudora) may do so, but they will need to access these clients outside BlueView because they are not Web-based. Whichever client is used, inside or outside the portal, all messages will go to the same central server, and can be accessed by any other client.
- d. Existing distribution lists will be imported into BlueView. Messages can still be sent to lists as "targeted announcements". See Section 9. Some distribution lists (e.g. school/college lists used by the Dean's Offices to communicate with their own students) will remain obligatory. Some lists will become optional, so that users can opt out of those from which they do not want to receive announcements. All these lists are automatically updated daily.

## 7. CALENDARING

- a. The portal has an icon on every page to connect the user to a personal set of calendars.
- b. For their personal calendar set, each user should subscribe to the calendars they want. There may also be calendars they are required to see (e.g. a dean may want all of a school's students to see the school calendar).
- c. In addition to seeing these calendars, a user can enter items on a personal calendar as a reminder of their own activities. However, this feature cannot be used to schedule meetings with other people.
- d. The calendars below will be used at the initial launch. Formal Owners are shown, although it is expected that others will be delegated to manage these calendars. The Portal Policy Committee may change this list as needed.
  - Academic (Provost): with events of academic interest
  - Individual school calendars [for those Deans who request them](#).
  - Athletics ( Athletics Director): with perhaps calendars for specific sports
  - Fine Arts (Dean of A&S)
  - Campus Services (Library hours, Drake Direct, Sodexo dining and facilities (if they choose to use it), parking, bookstore, , etc)
  - Course calendars for faculty and students are automatically generated based upon data from Banner (for those faculty wishing to use them)
  - Student Life (Dean of Students): calendars with events of interest to particular groups of students, Residence Life events, intramurals etc
  - A group calendar is automatically created for every group that exists in BlueView (Section 8).

- Other events of interest (Marketing): a catchall category for things which do not fit elsewhere
- e. There are three brands of calendars outside the portal which are in use to schedule meetings with other people: Corporate Time, Now Up To Date, and Outlook. Ideally, everyone would use the same one, making it much easier to schedule meetings. Unfortunately, no one piece of software provides all the functionality needed by all units. There is a meeting scheduler in BlueView, but it does not have all the features of those already in use, and so will not be used initially. (A better one is promised in Version 4 next year, and the Portal Policy Committee will review options then.)
- f. The issue of syncing calendars to portable devices or calendars outside BlueView has not yet been addressed.

Note: “Drake News” on the [Home](#) page is not a calendar as such; it is an ad hoc listing of things which Marketing & Communications thinks visitors to the portal may find interesting.

## 8. GROUP MANAGEMENT

BlueView permits the formation of Groups. Each group can have its own guest homepage, member homepage, e-mail list, calendar, message board, chat room, access links, posted articles, and photographs. Groups can be either public or restricted. Groups and group categories are listed in the Groups index on the Guide tab, unless the group leader (see below) has a reason for keeping its existence unknown to non-members.

- a. All groups must observe the relevant Acceptable Use policy.
- b. *The head of each major unit of the University will appoint a Group Administrator for people in that unit who wish to form a group.* The Group Administrator may delegate the duties to someone else.
- c. The Group Administrator may set additional policies governing groups which are created for the unit, and is responsible for those groups complying with policies.
- d. Requests for group creation via a web form must be submitted to a Group Administrator, and should include:
  - proposed Group Leader and requestor name (if different)
  - group name
  - short description to appear next to the name on lists and a long description detailing the proposed group’s purpose and mission
  - whether the group is to be public or restricted. A restricted group requires a user to submit a request through the portal and obtain approval from the group leader in order to join the group.

- e. Each group has a short name, a long name, and a group description. Group names must adhere to published naming conventions. The naming conventions will be decided by the Project Team and approved by the Policy Committee. A link to a page showing the naming conventions will then be inserted in this document. The Project Team will then include those conventions in training, and publicize them to the campus. Groups for similar purposes will be put into the same Category within the list of Groups on the Guide tab.
- f. The Group Leader must acknowledge awareness and acceptance of leadership responsibility in the request by clicking a check box. (see below for Group Leader responsibilities)
- g. Through check boxes, the requestor must indicate which group tools will be activated for the group and which group features can be delegated.
- h. A group can be deactivated and/or terminated for the following reasons:
  - By request of the group leader
  - Content is contrary to policies
  - Content is out of date
  - By request of Group Administrator
  - Failure to comply with applicable policies
- i. Requests for group termination via a web form should be approved by the Group Administrator and submitted to OIT for action.

Group leadership is an important responsibility. Without exception, any individual accepting this role is responsible for moderating group content to the degree necessary to assure that all applicable policies and regulations: see item (h) above. If Portal group tools are used in a manner contrary to Policy, the Group Leader should take appropriate actions in coordination with the Group Administrator.

The Group Leader must ensure that a potential group member is informed about usage protocols that apply to all members. Dialog boxes membership criteria and policies are available to potential new members. Potential members are also informed that a breach of protocol may result in the loss of membership, or other applicable disciplinary actions. Group members who feel that a Group Leader has taken unwarranted action can appeal to the Group Administrator.

Although group leaders have the ability to delegate or transfer leadership authority, they must obtain the permission of the Group Administrator before doing so. Group leadership can only be transferred to individuals who willingly accept the responsibility. Examples of situations where group leadership should be transferred include: the group leader is leaving Drake but the group needs to continue; the group leader no longer has an interest in leading the group and a new leader has been identified, or the group organization may choose to have group leadership change periodically as part of their group charter

## **9. TARGETED ANNOUNCEMENTS**

*BlueView provides a variety of ways in which announcements can be targeted to a particular audience. Those wishing to use the portal for communication purposes should select the most*

*appropriate alternative, which is the one which is most highly targeted to those who wish or need to receive the communication.*

- a. The “Alerts” channel on the Welcome tab will be used for important, time-critical information which has a major impact for the whole campus. Examples might include a security emergency, cancellation of classes because of weather, or the loss of an important technology service such as email. It is expected that the channel will only be used occasionally. The University will use other ways to communicate Alert information in addition to BlueView. Those able to send messages to the Alerts channel include the President’s and Provost’s Offices, and Security, with the Director of Marketing and Communications acting on their behalf, and OIT Directors.*
- b. Every tab will have an “Announcements” channel, to which targeted announcements can be sent from a number of sources. Any group leader can send announcements to their group members via the Announcements Channel. Other than that, the ability to send messages directly to the Announcements channel will be restricted to specific individuals, designated by Marketing & Communications. They who will be given guidelines on what types of message it is appropriate to send. These messages can be targeted to particular roles: faculty, employees, students, etc. Messages in the Announcements channel will expire after seven days.*
- c. There will be a number of Calendars operating within the portal (Section 7). Each user will have a “set” of calendars, and the information from all the calendars in the user’s “set” are combined into a single display. Hence calendar owners can post events on their calendar knowing that the targeted users will see them.*
- d. Group members can send announcements to other members, which will appear in the Announcements channel. It is important that group leaders set policies governing what types of messages group members can send, and monitor the use of this. The only way in which members can avoid receiving unwanted messages from other members is by leaving the group. Hence it is in the interest of group leaders to make sure that an excess of announcements does not lead to a fall in membership.*
- e. With the introduction of BlueView, the mailing lists maintained by OIT will be phased out over time: faculty, staff, student, facstaff, facstaffstu, residence hall students, emeriti, student college/major/class standing lists, etc. Their function will be replaced by the communication means described in this Section.*
- f. There are a number of faculty, course, professional, special interest and student-organization lists which are self-managed. The current listserv software will be maintained, and so these lists can continue as at present if their managers wish. However, their managers may prefer in some cases to switch to the Groups feature in BlueView, which has many functions beyond mailing lists. Those using the email function within Blackboard will probably wish to continue to do so.*
- g. The Marketing and Communications department will use the home page of the Drake website, and a News channel on the Welcome page of BlueView, as places to post news of general interest.*

## **10. COURSE MANAGEMENT**

BlueView contains a number of course management tools, some more useful than Blackboard, and some less. The portal product is in general less functional than Blackboard. The faculty will be consulted what use to make of the tools.

## 11. CONTENT MANAGEMENT

The Luminis system consists of:

- The Content Management System (CMS) which stores content and is particularly useful for reusable content (known as components). *A Site Studio within the CMS is used for creating content.*
- It is the goal that all public, official web pages, as defined in the Drake Web Policy, should be in the CMS and published from there to the public Web Site. Unofficial pages may also be placed in the CMS if the page owner wishes. Only material which the content creator wishes to make public should appear on the public Web Site.
- The Portal should be used for customized information and services for specific users, and for displaying information which the Tab or Channel Owner wishes to restrict to certain users. The Portal can draw components and other content from the CMS and the Public Web Site.

## 12. POLICY CHANGES

This Policy is subject to review and may be modified at any time. The Policy will be formally reviewed by the Portal Policy Committee at least once each calendar year, or in conjunction with significant system upgrades, whichever occurs sooner. The Portal Stewards will discuss proposed changes with impacted constituencies and the BlueView Leadership Committee. Final approval for significant changes will come from DAITE. The Revision Date and version number will be included with the master Policy document.

## 13. ASSESSMENT AND EVALUATION

*The BlueView Leadership Committee is charged with developing and maintaining a formal assessment system, covering the usability of the technology, the business/service processes that support the technology, and the overall strategic value and role of BlueView.*

*The assessment will reflect the development and technical support of BlueView, and the user perspective of the stakeholders. These stakeholders are the portal users, those who provide technical support, and the Executive Sponsors (DAITE).*

*A set of instruments and exercises will be used to develop information and data for the assessment process. These will include:*

- a. An online questionnaire used to solicit feedback from end-users on usability, satisfaction with technical support, and value relative to the core goals of the service (communication, collaboration and productivity).*

- b. *Benchmarking, using an instrument for comparing BlueView to "Best Practices" at other universities.*

*DAITE will review the results of the user survey and benchmarking annually, to ensure that the assessment leads to improvements in the service, and that BlueView continues to meet institutional needs in a cost effective way.*

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