myBYU Portal Policy

Version
1.0

Status
Draft

Approval Date
Pending

Next Review Date
9/--/2010

Owner
CIO

Purpose
This document defines the overall policy, principles, and requirements that govern the myBYU Portal.

Policy

To encourage and enable broad participation in creating and making available useful content and services for the University community through the enterprise Portal (myBYU), portal users, portal content creators, and portal providers are expected to comply with the requirements regarding portal development, portal content, portlet publication, portal administration, and portal support and operations (see www.xxxx for requirements and related procedures).

In general, the following principles guide the specific requirements:

- Any member of the BYU community and authorized third-parties may develop content for the portal.
- No portlet may be published in myBYU without the endorsement of a university sponsor.
- Contributors to, and users of, the portal are expected to comply with University policies concerning computer and electronic resources and with the Honor Code.
- Prioritization for the creation and enhancement of portlets will occur through the annual resource planning process if ITD funding is requested, or will occur at the departmental/unit level if locally funded.
- Unsupported portlets will be made available to users.
- The CIO reserves the right to remove any content without notice.
- The Office of Information Technology will make available resources and tools to enable any member of the BYU community to create content for the portal.

Change Log

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<td>Christine Tolman</td>
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myBYU Administration Requirements

Version
1.0

Status
Draft

Approval Date
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9/--/10

Owner
Portal Service Team (PST)

Purpose
The objective of this document is to define the requirements associated with the administration of the “core” components of myBYU.

Scope
This requirements document will focus on administration of the central uPortal application, portlet and tab library, and the gallery of myBYU themes.

Compliance Plan
The Portal Service Team (PST) will meet periodically to—

a. Review compliance with these requirements and make adjustments as necessary.

b. Identify and update the approved list of administrators for myBYU.

Context
1. The myBYU portal is built on uPortal technology. By default, an “admin” account is created and placed in a group called “Portal Administrators group.”

2. uPortal supports the concepts of user groups for rights and privileges.
Requirements

1. The Portal Service team--
   a. Approves additional admin accounts, or user accounts with administrative privileges.
   b. Identifies groups and which users will be members of each group (using the Group Reference Object).

2. Production Services--
   a. Creates and administers user groups for uPortal under the direction of the Portal Administrator.
   b. Retains the admin password to the production instance of the myBYU portal by default.
   c. At the request of the Portal Administrator and with the approval of the CIO or his designee, deletes, or removes portlets, themes, or tabs, that are deemed inappropriate, perform poorly, or that are not in compliance with other myBYU policies.
   d. Backs up and, in the event of a system failure or outage, restores “core” features and configuration data as well as user settings and customized layout settings.
   e. Has rights (and knowledge) necessary to initiate start, stop, and re-start batch processes for the production instance of myBYU.

3. uPortal Administrators—
   a. May act as a user proxy to access, customize or administer individual accounts in response to a user request for support.
   b. Have the ability to modify both the Groups Manager as well as the Portlet Manager.
   c. Can access other administrative portal user interfaces.

4. Changes to the production instance of myBYU (including upgrades to the uPortal infrastructure and JSR 168 portlets) require
   a. An approved change order.
   b. Successful outcomes when tested for performance and compliance in development and stage environments.
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myBYU Content Requirements

Version
1.0

Status
Draft

Approval Date
Pending

Next Review Date
9/--/2010

Owner
CIO

Purpose
This document defines what content is considered acceptable for inclusion on the myBYU Portal.

Scope
This set of requirements specifically addresses content requirements for portlets, tabs, and themes.

Compliance Plan
1. The Portal Governance Advisory Board (PGAB) will meet periodically to review compliance to the statements associated with this policy and recommend changes to the CIO.

2. Before a portlet, gadget, tab or theme is released for production in myBYU, the Chair of PGAB will review all portlets, tabs, and themes for appropriateness of content as defined in this document.

Requirements
Portlets, tabs, or themes may not include, or display content that includes the following:

1. Any violation of the BYU Honor Code.

2. Any violation of the University’s Computer and Electronic Communications General Use Policy

3. Copyright Violations: Web pages must be free from copyright violations. You are responsible to verify permission for any copied materials.

4. Invasions of personal privacy.

5. Collection of personal information, including credit cards and user credentials.

6. Portlets that include social security numbers must have all but the last four digits masked (see SDK for details).

7. Impersonations of third parties, including other Universities, businesses, or organizations.

8. Promotions that contain hate, violence, discrimination.
9. Illegal Content – Ensure that all links, applications, digital content agreements are complied with the original provider. Icons, pictures, and other elements that can be used by more than one person exist in a shared domain in a gallery or as part of the templates. Unless specifically exempted, any materials submitted for use in this way will become “college domain” and will be available in this directory.

10. Political Affiliation: The essential function for the university requires strict institutional neutrality, integrity, and independence regarding political activities.

11. All content must be “Family Safe”, no pornography, or obscene content will be allowed.

12. Content that interferes with normal operation and functions of the myBYU Homepage.

13. Advertising for off-campus products or services (advertising for BYU programs, events or sales is allowable).

14. Any other content deemed inappropriate for the BYU community.

The content of portlets, tabs, and themes is expected to:

1. Be useful (meet the needs of students, faculty, and/or staff)
2. Improve access to information and services.
3. Be graphically pleasing and appropriately represent BYU standards and values.
4. Support the mission of the University.

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myBYU Development Requirements

Version
1.0

Status
Draft

Approval Date
Pending

Next Review Date
9/--/2010

Owner
Portal Service Team (PST)

Purpose
This document defines the requirements for creating content (portlets, tabs and themes) for the myBYU portal.

Scope
This policy applies to anyone who creates myBYU portlets, tabs and themes for publication in the myBYU portal.

Compliance Plan
At the time a portlet, tab, or theme is submitted for publication, the myBYU Portal Administrator will review all new and changed portlets, tabs, and theme submissions to ensure that they meet the development requirements as defined.

Requirements
Who can develop content for myBYU:

1. Portlets, tabs and themes may be developed by any member of the BYU community (students, faculty, or staff) and authorized third-parties.
2. Employees developing content using University resources or on University time are required to have received approval from their line manager.
3. Anyone planning to develop content for publication in myBYU must agree to the “Terms of Use” published in the SDK and presented at the time content is submitted for publication.
Portlet, Tab and Theme Requirements:

1. Portlets, tabs, and themes must be developed following the standards described in the latest version of the Portal Software Developer’s Kit (SDK). See [www.xxx](www.xxx) for details.
   a. The following “patterns” for creating portlets are encouraged:
      i. XML Web Service
      ii. Proxy Portlet
      iii. RSS
      iv. Deep Linking
      v. Image
   b. SQL is discouraged
   c. Java Applets and JSR-168 portlets require prior approval (see [www.XXX](www.XXX)) for details.

2. At the present time, developers wishing to develop JSR-168 portlets may do so only--
   a. As part of a planned and funded project done in collaboration with OIT
   b. As part of a departmental project, sponsored by their line management
      i. After being certified by the Office of Information Technology as JSR-168 developers. Contact _____ for more information.
      ii. Collaborating with OIT Portal engineers for testing and publishing (deploying) portlets. Prepared for testing and publication in collaboration with OIT (Contact _____ for more information)
      iii. After agreeing to provide or pay for the full monitoring and support of each JSR-168 Portlet
         1. May contract with OIT to provide these services
         2. A service level agreement would be established

3. Portlets may only use web services that are in the University’s Web Services Registry unless an exception has been approved by the CIO or the web service is an approved 3rd party web service (e.g. Amazon’s EC2).
   a. To assure compliance with data sharing agreements
   b. To assure high quality portlets

4. Portlets, tabs, and themes must meet the myBYU Content Policy.

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myBYU Portlet Publication Requirements

Version
1.0

Status
Draft

Approval Date
Pending

Next Review Date
9/1/10

Owner
CIO

Purpose
The objective of this document is to define the policies associated with the publication of portlets in myBYU.

Scope
This requirement will focus on publication of portlets in myBYU, the enterprise portal.

Compliance Plan
1. The Portal Service Team (PST) will meet periodically to review compliance to the statements associated with this policy and recommend changes to the CIO.
2. Portlets published in myBYU will comply with established processes for production systems.

Policy Statements
The following statements are associated with this policy:

1. Before any portlet can be considered for publication, it must be registered and submitted for testing in myBYU (see www.xxx).
   a. Portlet authors are expected to have evaluated the functionality and performance of their portlet prior to submission for testing.
   b. A checklist identifying portlet elements to be tested is included in the SDK (see www.xxx)
2. Following a successful test, a portlet must be submitted for publication (see www.XXX)
3. A portlet author must agree to the BYU Portal Terms of Use before a portlet can be published in myBYU (see www.xxx and included in the online Submit for Publication form.)
4. Every portlet published in myBYU must be reviewed by a University sponsor (see Portlet Sponsor requirements below) who endorses the portlet for publication after verifying that the proposed portlet--
   a. Is consistent with relevant policies and programs managed by the sponsor.
   b. Does not contain inappropriate content.

5. Portlet Sponsor Requirements
   a. A portlet sponsor must be a full-time employee of the University and must be either a
      i. Data steward, or a
      ii. Dean, Director, or Vice-President
   b. There are two types of portlet sponsors:
      i. A vested sponsor—a person who provides the financial resources for developing the portlet, initiates the creation of the portlet, guides the development of the portlet, and arranges for its long term support.
      ii. Designated sponsor—the person whose role is limited to validating that a proposed portlet does not conflict with programs or policies for which they are responsible.

6. In the event the University sponsor does not support the publication of a proposed portlet, the sponsor must
   a. Provide a written notification of “rejection” to the CIO or his designee
   b. Include specific reasons for the rejection and
   c. Where appropriate, describe changes the portlet submitter could make that would make it possible for the sponsor to endorse the portlet

7. Any portlet not endorsed for publication by a University sponsor, may be escalated to the ITPC for consideration at the discretion of the Information Technology VP/CIO.

8. Portlet Naming
   a. Portlets are identified by “title” and “name”
      i. Title is the name that appears in the portlet banner
      ii. Name is the name that appears in the portlet gallery
   b. When “naming” a portlet (giving it a title or name) portlet authors are to observe the following conventions:
      i. Use short, user-oriented terms (25 character titles; 30 character names)
      ii. When starting the title with “my”
         1. Use lower case “m” and “y”
         2. Followed by no space (e.g. myBenefits)
      iii. Otherwise, start with a capital letter
      iv. Capitalize only the first letter of every word
      v. Avoid the use of organization names
      vi. Do not use acronyms
      vii. Do not add the word “Service” or “Portlet” at the end
      viii. Do not contain a version number
      ix. Do not use underscores
9. Portlet Lifecycle
   a. Every portlet submitted for publication must identify
      i. A date for publication
      ii. A date for expiration (if applicable)
   b. Production Services will configure the portlet accordingly.

    a. Portlets submitted for publication must include a description, with appropriate
documentation, of the support that will be provided to end users of the portlet; No
Support is an option. (See myBYU Support and Operations Policy for details.)
    b. For cost-tracking purposes, every portlet must be assigned to an OIT “parent” product
or service; “non-supported” is a valid option.
    c. A sponsor may “adopt” an “unsupported” portlet and assume responsibility for
enhancements and support
       i. In response to an invitation by the Portal Administrator or
       ii. At their own request.

11. No portlet may be published in myBYU without the express approval of the CIO or his designee.

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myBYU Support and Operations Requirements

Version
1.0

Status
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Approval Date
Pending

Next Review Date
9/--/2010

Owner
Portal Service Team (PST)

Purpose
Define the requirements for the operations and support of the University portal, myBYU, and its content (portlets, tabs, and themes).

Scope
These requirements apply to the operation and support of myBYU and its content (portlets, tabs, and themes).

Compliance Plan
The CIO or his designee, upon the recommendation of the Portal Administrator, must give final approval before any additions, or changes, to myBYU or its content (portlets, tabs, and themes) can be released in the production version of the portal, made available to campus, and where applicable, supported by OIT.

Requirements

Portlets

1. Each published portlet must have been endorsed by a University sponsor (see myBYU Publication Policy for Portlet Sponsor requirements.)

2. Portlets submitted for publication must include a description, with appropriate documentation, of the support that will be provided to end users of the portlet. Support must be provided at one of the following levels:
   a. Full Support (see www.xxx for details).
      i. May be provided by the vested sponsor or by OIT (as a contracted service)
      ii. Required of any JSR-168 portlets
b. Limited support (information about who to contact if there are problems with the portlet with minimal resources committed to resolve problems and answer questions).
c. No Support. When this option is selected,
   i. The portlet will be designated as “Unsupported” in portlet information
   ii. The portlet may be withdrawn from production at the discretion of the Portal Administrator.
   iii. Users of Unsupported portlets will be advised: “No support is available for this portlet; use at your own risk!”

3. For cost-tracking purposes, every portlet must be assigned to an OIT “parent” product or service that is an--
   a. Existing OIT Product or Service
   b. New OIT Product or Service
   c. Unsupported/Non-OIT Product or Service

Tabs

Every Tab accepted for inclusion in the Portal Gallery must have a University sponsor who assumes responsibility for--
   a. Defining the Tab content with related configuration requirements
   b. Approving proposed changes to Tab content
   c. Submitting requests for updates to the Tab content and related configuration requirements to the Portal Administrator
Themes

1. The CIO or his designee approves all Themes included in the Portal Gallery.
2. OIT assumes all support and operational responsibilities for all Themes included in the Portal Gallery.

Versioning Requirements for Portlets, Tabs, and Themes:

1. Only one version of a portlet or tab may be in production at any time.
2. Portlet authors wishing to add, or change a portlet, follow the same process as that outlined for a new portlet.
3. All changes to production portlets, tabs, and themes will go through a standard change process
   a. To ensure that the portlet, tab, or theme is properly documented, certified, and registered.
   b. Change requests for portlets will be prioritized by the Portal Administrator based on
      i. Amount of usage and visibility to campus
      ii. The urgency of the requesting portlet developer (their business needs)

Portlet Deprecation/Removal:

1. The Portal Administrator reserves the right to remove or disable any content because of poor performance, inappropriate content, or any other justifiable reason.
   a. The CIO or his designee must approve the deprecation of a portlet.
   b. The Portal Administrator is responsible for providing the CIO or his designee with information describing the expected impact resulting from the deprecation/removal of content or a portlet.
   c. The Portal Administrator is responsible for notifying the portlet developer and sponsor and providing the reasons for the action taken.
2. Vested sponsors assume responsibility for announcing retirement of content when it becomes unneeded or obsolete.

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