MEMORANDUM

TO: Rolf Groseth, Vice President
Inter-Campus Affairs

FROM: Randy Pauley, Portal Project Manager

DATE: May 17, 2005

RE: Summary of Recommendation for Portal Colors & Logo Set

The Color & Logo Customization utility provided with the SCT Luminis portal allows us to create and maintain customized colors and logos on the Luminis system pages. Using this utility we can deliver color & logo sets to different users based on their roles. For example, if we want faculty to view one color & logo set, and we want alumni to view a different color & logo set, we can do so by creating a faculty set (or skin) and an alumni set. The skin will be delivered to users based on which role they have. However, many users will have multiple roles (maybe on multiple campuses) but only one skin can be presented to a user.

Attached is an Issue Briefing describing how the Color & Logo Customization utility functions, three options faced by Montana State University for Color & Logo Sets, and finally a recommendation. The options and recommendation appear below:

♦ Option 1 - Branding with Precedence Rules. Develop campus-specific color & logo sets (skin) and use precedence rules to present branded skins. This option would require the development of at least eighty (80) branded color & logo sets as described above. This might delay the project. Additionally, because many users have multiple roles many users would see skins that would not match there primary role and assume the Portal was not working correctly.

♦ Option 2 - Smart Branding. In consultation with SunGard SCT, MSU could develop a "smart branding" customization. This customization would allow users to override the color & logo sets they receive based on the precedence rules. The “minimum effort” estimate from SunGard SCT for development and implementation of this option is approximately $67,000 over five years. MSU resources, especially from the Banner support team, would also be required to support and maintain this customization, and would require additional user training. This customization would significantly delay the project implementation time line and increase implementation and ongoing maintenance costs for the Portal.

♦ Option 3 - Thin Skin. In response to these and other concerns raised by various Functional Project Team representatives and key stakeholders, the Portal Project Team conducted some research with both SunGard SCT and other universities that have similar multi-campus issues with the Luminis product. From this exploration came the idea of using a “thin skin.” This would mean that a color & logo set would be developed that could be used as the portal background for all MSU portal users. Branding for any particular institution would be presented in portal channels along with the channel content.

RECOMMENDATION

The CIOs from the four campuses as well as the Functional Team Leaders recommend Option 3. This option appears to best suit the overall inclusive nature of the project, facilitates “branding” of information through channels, is in line with the project budget constraints, and requires the least cost and effort for long term maintenance.
Montana State University
Luminis Portal Project
Issue Briefing

Portal Logos & Color Sets

INTRODUCTION TO COLOR & LOGO SETS

The Color & Logo Customization Utility allows us to create and maintain customized colors and logos on the Luminis system pages. Using this utility we can deliver color & logo sets to different users based on their roles. For example, if we want faculty to view one color & logo set, and we want alumni to view a different color & logo set, we can do so by creating a faculty set (or skin) and an alumni set. The skin will be delivered to users based on which role they have. However, many users will have multiple roles (maybe on multiple campuses) but only one skin can be presented to a user. This limitation requires that a set of precedence rules be used to determine which skin should be presented when a person has multiple roles.

COLOR & LOGO SET PRIORITIES

When we create more than one color & logo set we need to prioritize them carefully. This will ensure that the proper skin is being presented to users who have multiple roles. For example, if a faculty member is also an alumnus, the colors that will appear when he or she logs on will depend on whether the skin associated with the "faculty" attribute takes higher priority than the skin that is associated with the "alumni" attribute.

Montana State University has developed Custom Roles for: Applicant, Student, Staff, and Faculty. Each custom role can occur on each campus, resulting in a total of sixteen custom roles. For example, there are four faculty custom roles: 1) Faculty-Bozeman; 2) Faculty-Billings; 3) Faculty-Northern; and 4) Faculty-Great Falls. The number of custom roles can be expected to increase as the Portal gains acceptance with users. There are already discussions and outstanding requests for additional custom roles for the next phase of Portal deployment including Grad School Applicant, Prospective Student, Alumni, and others.

COLOR & LOGO SET MAINTENANCE

There are five components for each color & logo set. Each component is associated with particular functions within the Portal. These components are:

- **Portal Logo:** Displays at the top of the portal page.
- **Framed Page Logo:** Displays on new pages that open as separate windows.
- **E-mail Logo:** Displays at the top of the e-mail window.
- **Calendar Logo:** Displays at the top of the calendar application window.
- **Groups Logo:** Displays at the top of each portal Group window.

Each time the color & logo set is changed; all five components would have to be changed as well. An example of this comes from a suggestion offered by several students that the portal “skin” could be modified according to seasons, special events, holidays, etc.

If separate color & logo sets are used for each role then maintenance would involve a minimum of sixteen (16) color & logo sets and would require upkeep for at least eighty (80) components. As the number of custom roles increases so does the number of color & logo sets that have to be maintained.

If a common “thin skin” is used then Montana State University could have one color & logo set that could quickly and easily be changed. Maintenance and coordination would be significantly easier and less expensive.
ISSUES & IMPLICATIONS

CAMPUS BRANDED COLOR & LOGO SETS
Ideally the Portal Project Team desires to present campus specific “branded” color & logo sets to all users. The limitation is that there are a significant number of users in each of the current user categories (Applicant, Student, Faculty, & Staff) who have roles on more than one campus.

♦ Precedence Rules. The way to present the correct color & logo set to a user with multiple campus affiliations is to develop a set of precedence rules. Some roles obviously “trump” others and the color & logo sets associated with them should be the ones presented to the user. Precedence rules as implemented within Luminis cannot be “smart” events, though. As a result, many users would be presented with branded “skins” based on these rules that did not match their most significant role at Montana State University. For example, if the faculty role took precedence over the staff role, a full-time employee on the Bozeman campus who was also an occasional Adjunct Instructor for MSU-Great Falls would receive an MSU-Great Falls branded skin. This presentation of the “wrong” skin to users would cause the portal to seem “broken” to the user and could negatively impact its adoption.

♦ Multi-Campus implementation. The portal project is an inclusive one, addressing the four campuses as well as non-traditional or distant learners. Branded portal skins in conjunction with precedence rules will inevitably result in some campuses consistently being slighted, or having a diminished presence in the portal. The precedence rules circulated earlier show a priority of roles as follows: 1) Faculty, 2) Staff, 3) Student, and 4) Applicant. Within these categories, the precedence rules would present branded skins based on campus size (e.g. a) Applicant-MSU, b) Applicant-MSU-Billings, c) Applicant-MSU-Northern, and d) Applicant-MSU-Great Falls). In a scenario using campus branded skins and precedence rules, a student applying at multiple campuses (e.g. Bozeman, Billings, and Northern) would only see the skin (color & logo set) of the largest of the schools to which they apply (Bozeman in this example).

OPTIONS
The Portal Project Team has identified several options for resolving the issues and implications outlined above.

♦ Option 1 - Branding with Precedence Rules. Develop campus-specific color & logo sets and use precedence rules to present branded skins. This option would require the development of at least eighty branded color & logo sets as described above. To accomplish this would delay the original project implementation time line.

♦ Option 2 - Smart Branding. In consultation with SunGard SCT, MSU could develop a “smart branding” customization. This customization would not replace the need for precedence rules but would, in essence, allow users to override the color & logo sets they receive based on the precedence rules. The “minimum effort” estimate from SunGard SCT for development and implementation of this option is approximately $67,000 over five years. This cost might increase as SunGard SCT went through requirements-gathering and detailed design processes. MSU resources, especially from the Banner support team, would also be required to support and maintain this customization. This option would also require additional user training. Choosing this customization would significantly delay the original project implementation time line.

♦ Option 3 - Thin Skin. In response to these and other concerns raised by various Functional Project Team representatives and key stakeholders, the Portal Project Team conducted some research with both SunGard SCT and other universities that have similar multi-campus issues with the Luminis product. From this exploration came the idea of using a “thin skin.” This would mean that a color & logo set would be developed that could be used as the portal background for all MSU portal users. Branding for any particular institution would be presented in portal channels along with the channel content.

RECOMMENDATION
The CIOs from the four campuses as well as the Functional Team Leaders recommend Option 3. This option appears to best suit the overall inclusive nature of the project, facilitates “branding” of information through channels, is in line with the project budget constraints, and requires the least cost and effort for long term maintenance.
Sample of Portal “Thin Skin”