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# The Portal Buyer's Guide

**INGENIUX**

Content beyond boundaries

We live in a digital world. From commerce to customer service and support to the digital workplace, people look to do business online first. As enterprises continue to invest in digital transformation, services and information are increasingly available online.

The challenge is that information, services, and applications are often managed in different systems. This makes information hard to access and requires navigating many sites and applications to achieve even the most basic tasks. Security and customer data become hard to safeguard, the experience is complex to manage, but most importantly, it's a bad user and customer experience.

Your customer and employee-facing experiences should not reflect the scattered archipelago of your various applications but deliver connected experiences that help users easily find the information they need and successfully complete the task at hand.

Imagine sending your customers to four or more applications to get the information or support they need:

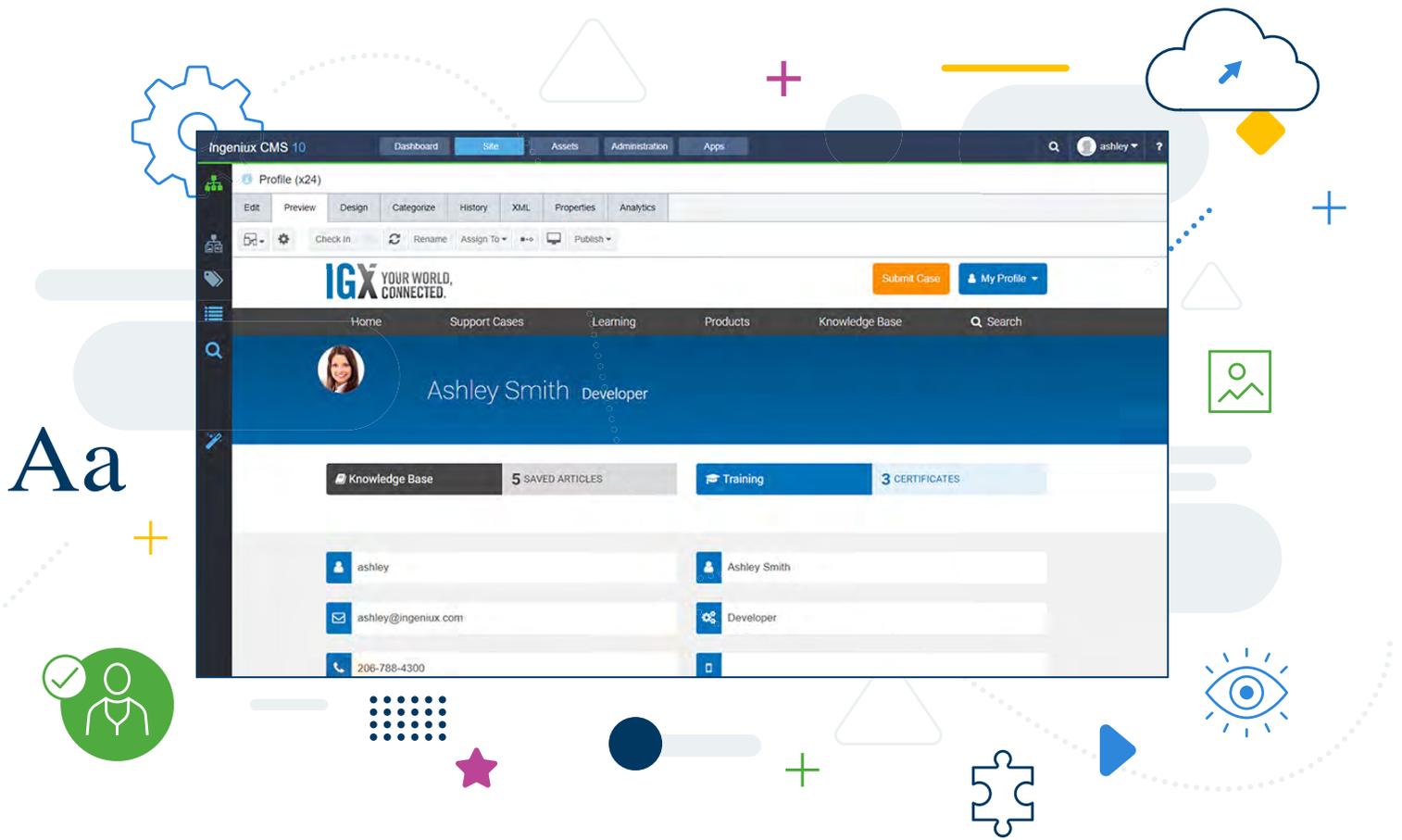
- Your website for product and company news
- Your support ticket application for product and service support
- Your knowledge base site for product information
- Your call center for everything

Now, imagine your employees moving from application to application to report expenses, submit timesheets, read corporate news, and access their work. We can describe the same challenge for university students, partners and value-added resellers, and other groups.

Giving customers multiple channels to engage with you and get help with their questions and support issues is not making it easy to work with you. Requiring employees to access multiple applications to do their work and manage their employee information is time-consuming, reducing productivity. It's the opposite and leads to frustration.

You need to bring all these separate applications and experiences together in a single, seamless and consistent experience.

This centralized experience is a portal.



## What is a Portal?

There are many definitions of what a portal is. It's one of the most used yet least understood words in technology. But when you reduce it down to the essential definition, it's very simple:

**“A portal is a secure website where “members” log-in to view premium or personalized content. With our approach, you get all the design freedom and modernization of a website, with the explicit personalization and entitlements of a portal application.”**

# The Evolution of Portal Technology

A centralized customer experience is supported by portal technology. To understand how today's portal technology supports customers, let look at how portal technology has evolved over the years.

## Application-Driven Portals

The first portals were built for internal use and were a way to communicate company information and provide centralized access to company applications. HR and Corporate Communications shared HR-related information and company news to employees in the portal. These first portals included links to applications like time and expense reporting and other key employee applications. Each employee had a profile page where they could customize the application links for them.

Although application-driven, these portals simply opened the applications in new windows where the employee would need to sign into the application again. In some cases, single-sign technology provided a one-time sign-on to the portal and then one-click access to some applications, particularly the HR applications.

As portals evolved, more application functionality was built into them. SharePoint is a good example of a later application-driven portal. It offered some built-in capabilities, including team sites for storing and collaborating on projects and documents, and provided links to other employee applications.

## Content-Driven Portals

Newer portal technology has evolved to become more content-driven. They extended outside of internal use to include customer support portals, partner portals, and student portals.

A Content-driven portal, or digital experience portal, is a secure website that delivers content, applications or online services, collaboration, and engagement. You use a content-driven portal for any use case that requires secure access to information, collaboration, or explicit personalization based on the user profile.

Content-driven portals are designed to be a one-stop place for employees, customers, or students to come and find everything they need. They include integration capabilities that

directly bring content and data from external applications into the portal, so the user doesn't have to go to multiple applications. At the same time, they still provide single sign-on access to applications that provide even more capabilities for the user.

## The Meta Portal

Almost every application comes with a portal-like experience, a dashboard view of information found within the application. But it's a single portal for a single purpose – to support that application.

A meta portal is a hub that pulls content and data from multiple applications into a single experience, giving the user one place to perform many tasks. For example, a payroll portal would integrate and pull in content from a timesheet application, a PTO application, and an expenses application. It would also include a searchable employee handbook that gives employees easy access to everything they need to know. The employee can update or add information in the portal, and it's automatically updated in the source application.

# Portal Use Cases

Portals benefit many users and use cases, including customers, employees, communities, partners, and students.

## Customer Support Portal

A customer support portal brings together information and support services from your existing applications into one centralized website, giving both you and your customer a 360-degree view of the customer's service and support requirements. Customer portals integrate with CRM, ticketing, and knowledge-base systems to give customers a single location to view all the information they need to use your products and services.

## Intranet & HR Portals

Intranets and HR Portals have been around for a long time, but the new version of these portals provides a content-driven experience that combines content management, application integration, collaboration, and robust security in a central interface, with the ability to extend and enhance it for specific use cases.

## Higher Education Portal

Modern student portal solutions offer a contextual, content-driven experience that brings together the information and systems students and faculty require. A combination of intranet and portal, a modern portal, securely integrates business systems such as ERPs and LMSs and offers content within the portal directly, giving students one place to quickly find information and engage with the institution, instructors, and other students.

## Build Your Own Portal

Sometimes a company has a specific need for a portal that doesn't match a typical use case. In this case, a digital portal platform provides the tools and capabilities the company needs to build a custom portal specific to its requirements.



# Portal Features and Capabilities

If you are looking for a modern portal, we recommend you evaluate the following features and capabilities.

### UX Designer

The portal user experience must be easy to understand and use. A portal technology should include a visual designer that allows administrators to easily design dashboards and portal pages for desktop and mobile access. Look for a designer that is automatically responsive and supports company-defined standard templates.

## Dashboards

Dashboards are the primary interface for a portal experience, surfacing essential information and links. The portal should provide the ability to define multiple dashboards and enable users to customize the dashboard to fit their needs. Administrators should be able to lock down certain sections so they are always visible.

## SSO, Permissions, & Access

Depending on the portal type, you might want single sign-on, leveraging your existing identity provider such as Active Directory Federation Services (ADFS), Azure AD/Office 365, Shibboleth, Ping, Okta, etc. Some portals provide the ability to use multiple identity providers, enabling you to support several ways to access the portal quickly. Your portal should also provide built-in security for use cases involving external users (such as customers or partners).

Due to the sensitive nature of the information and data available in portals, robust security and permissions are critical. Look for a portal that enables administrators to assign permissions on a group, role, user, or content asset level to ensure information is appropriately secured.

## Member Profiles

Portal solutions provide a member profile that is often integrated with your CRM or ERP. The integration means your profiles are a combination of external profile information and custom profile elements. You decide what profile information a user can update and have automatically synced with the external profile system.



## Notifications/ Activity Feeds

Notification and activity feeds offer portal users a way to connect to other users and stay up to date on events and activities, as well as provide alerts and items of interest, such as major events and deadlines. This content is often displayed on the main dashboard, but some portals also offer an email option that will send regular updates to the user's email address.

## Enterprise Search & Discovery

Portals provide access to a wealth of content and data and require a search engine to make it easy to find the information they need, even when it's only surfaced through the portal from another system. The portal solution should include a built-in search that offers federation, faceted or guided search, secure search, and multilingual search. Portal administrators should be able to configure search rankings and customize the search results user interface.

## Community

Your portal solution should include common community elements such as blogs, forums, activity feeds, social feedback (comments, likes, ratings), and interest groups. Gamification is another feature that encourages engagement through elements such as leaderboards, badges, and games. Companies can identify community managers internally or extend community manager capabilities to other groups or participants.

## Collaboration

If your portal supports internal users or partners, collaboration is another critical capability. Departments and teams need a place to store information, projects, contracts, schedules, etc. The portal solution should include features such as shared workspaces and calendars, activity feeds, and notifications.

## Content Management

A modern portal solution includes full capabilities for content management to enable administrators to create and manage content directly in the portal. Administrators give departments or groups access to author, edit, and publish content for specific areas of the portal. Content management features should include review and approval workflow, web governance, and accessibility.



## Integrations

Modern portal solutions provide integration using modern web standards for Web Services and APIs. Most solutions come with out-of-the-box integrations for standard systems, including CRM, ERP, LMS, and others. The integration enables portal administrators to pull in some of the information from these systems to display in the portal directly, including profile information, and set up single sign-on to these systems where necessary.



## Mobile Access

The portal solution should natively support responsive frameworks like Bootstrap, Angular, and Foundation to create the portal experience you want. It should also recognize the user's device and display the portal experience appropriately.



## Analytics

To understand how your employees, customers, or other users are using the portal, your portal should provide web analytics dashboards on a page-by-page and portal-wide basis. Most portal solutions integrate with existing analytics providers such as Google, Adobe, and WebTrends. Along with out-of-the-box reports, you'll want to be able to create custom reports that help you understand how to improve the portal experience.

# Deployment

You have several options for deploying a portal solution: cloud-based, SaaS (Software as a Service), or on-premises.

## On-Premises

Deploying the portal technology within your own network is the more traditional approach. You buy the portal license and install the software in a server environment. Your IT group handles all aspects of portal management, from the servers and network (including security) to the portal technology itself (with support from the portal provider). An on-premises installation is probably the most expensive way to implement a portal solution because you are responsible for everything.

## Cloud-based

A second option is to host the portal solution in a cloud environment. The cloud environment is managed by an external cloud provider such as Azure or AWS, but your IT team is still responsible for managing the portal technology. Some portal providers offer support for managing your portal in a dedicated cloud environment, which means they support the entire environment.

## SaaS (Software as a Service)

The third option is to use a SaaS-based portal solution. In this deployment model, the portal provider hosts the portal in a managed multitenant environment, in some cases dedicated, depending on your requirements. A managed hosting solution enables you to accelerate growth and scale operations while controlling costs and reducing IT infrastructure support risks.

The Cloud supplies greater scalability, less management overhead for IT teams, and the peace of mind of having one number to call to address your web software, performance, and uptime services.

# How to Buy a Portal

Buying a portal is not as simple as performing a Google search and selecting the first portal solution provider that appears. Several factors affect your decision.

## Identify Uses Cases

The use case is probably the most critical factor in the portal solution you select. Many portals are designed to support a specific type of experience: customer portal, student portal, etc., so you'll need to know which type of portal you need.

If you know you want to create multiple types of portals; a customer support portal for your customers and a project and team collaboration portal for your employees, you may consider a digital experience portal solution that enables you to create multiple types of portals from a single architecture.

## Define Audiences

A portal can support multiple audiences. For example, an intranet portal supports employees, human resources, and corporate communications. A customer support portal may support customers, employees, and in some cases, partners.

Each type of audience will have different permissions and views, so it's essential to identify what audiences need access to the portal and what they will do in the portal. List these requirements, and be sure you can map the security and capabilities in the portal technology you select.

## Cloud or On-Premises

Depending on the portal solution, you have the choice of an on-premises solution that you will need to install in your internal environment and manage yourself or a hosted, cloud-based solution that the portal provider manages.

Depending on which option you choose, the costs and work associated with supporting the portal will differ.

In a hosted solution, the portal provider manages the portal technology and environment, leaving you to control the portal experience. This approach reduces the need for IT and gives you the freedom to focus on the user experience. Look for a portal provider that goes beyond traditional hosting by supplying application management, change management, performance management, and application optimization. Also, look for a provider that gives you the power to upgrade at your convenience, ensuring you know any changes to the environment will work before they are implemented.

In an on-premises solution, you are responsible for implementing and supporting the complete portal environment, from the servers and network to the portal technology itself. You will need trained IT support to manage the portal daily and be available for updates and maintenance, as necessary.

## Budget

Another key factor in deciding which portal solution to purchase is your budget. There are many portal solutions available at different price points, some with limited functionality. If you need to support more than one use case but have a limited budget, consider a portal solution that can support all your needs instead of getting a separate portal solution for each portal type.

## Vendor Stability

The portal vendor's stability is another consideration. Buyers should ask themselves how vendor strategies and market presence will contribute to the vendor's continued success in the market – or even existence – over the next few years.

Look closely at the viability of the portal provider, its existing client-base, and its product roadmap. Evaluate how it aligns with your key use cases and plans.

## Customer Support

Excellent customer support is essential to the timely resolution of critical issues, which can dramatically impact company profitability. To take but one example, system downtime at the wrong time can dramatically compromise the portal presence as a whole: customers not having access to ticketing or customer support, for example.

If the portal provider does not offer 24/7 customer support or technical issues cannot be resolved quickly (within several hours), you will run into problems. For example, customer support will get overrun with calls, and self-service will be unavailable frustrating many customers. If it's an internal portal, employees may not have access to work environments and critical documents they need to do their jobs.

## Total Cost of Ownership

When evaluating portal solutions, look at the total cost of ownership (TCO) of each solution. Some things to include in your evaluation:

- Licensing costs (including one-time and subscription fees)
- How the licensing increases based on the number of administrators and content managers
- Set up and implementation
- For on-premises installation, the cost of servers, network, and other architecture needed to host and run the portal environment.
- Security costs
- Training for administrators, content creators, and end-users
- Ongoing support

Once you understand all the costs associated with implementing and maintaining your portal, you can figure out TCO and decide the best option.

# Implementing your New Portal

A portal is an essential technology in organizations today. You may even need more than one, depending on the use cases you need to support. Critical to the success of any portal you chose to implement is understanding its requirements fully and mapping those requirements to the technology selected.

It's also important to be clear on the costs associated with the portal technology and the ongoing support requirements to keep the portal working smoothly.

Finally, you will not have a successful portal implementation without organization buy-in. Because the portal includes integration with many other applications and often involves multiple teams, your executive team must be in full support of the portal and the work required to get it successfully implemented.

# ABOUT INGENIUX

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent “structured” content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications, and other key channels.

Ingeniux software is available as a fully managed software service or an on-premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at [www.ingeniux.com](http://www.ingeniux.com).

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