

Applications Platform

Quick Start Guide

Planning your web portal project

| Web Portals



? Why Do You Need A Web Portal?

The business case for developing and deploying a web portal will often start with a single 'pain' or 'flash point', but it is important to fully establish the everyday drivers that are creating a very real need for web portal technology.

These can vary depending on the nature of the organisation, the environment in which it operates and its objectives. However, the following business drivers are likely to be evident within your organisation and should be documented:

1. Multi-location organisation with disparate teams

If your organisation operates across multiple locations it is likely that data will be manually accessed and sent to other locations for review, contribution or sign off. Disparate systems, or custom in house applications, are common place and often employees are required to manually process the data for consumption by a non-system user.

2. Need for external contribution to processes e.g. suppliers, customers or other stakeholders

Business processes rarely remain within an organisation and this external contribution can significantly slow down or hinder productivity. Web portals remove any bottle necks generated by external contributions and improves the performance of an organisation.

For example, managing supplier or channel retailers via a central web portal means all interactions, statuses and history can be processed in real-time by both parties. This joined up approach can play a critical role in removing the risk for using error-prone spreadsheets, email and database silos.

3. Reduce the number of primary system licenses in use

The larger the organisation the more common it can be for employees to require license keys for primary applications to interact with a system in a limited or routine nature. For example, continuing with primary system license keys for the process of providing suppliers with simplistic update reports is not an effective or economical use of the system.

Implementing a web portal can remove the need for non-essential primary system license keys and ensure the organisation optimises its IT expenditure.

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4. Greater visibility of information (by department, manager or tailored for a specific individual)

The visibility and rapid access of management information has become a critical success factor for both small and large organisations. The problem with traditional approaches to the supply of Management Information is that it's often a multi-system, multi-employee approach, and this can be costly to process.

The implementation of a web portal removes this challenge by enabling organisations to serve up truly personalised views of management information which can also be manipulated and interrogated. This powerful approach to providing information from multiple applications can significantly improve management visibility of information and reduce decision-making times.

5. To improve business agility and bypass the need for primary systems adaptation

Adapting primary systems to hold new information, or to offer new functions, can cause problems for an organisation. Firstly, the bespoke development of an ERP system may prevent future upgrades of the application and, secondly, it may not be possible for the application to cater for an organisation's exact needs.

This reduces an organisation's ability to respond to changing environments and could result in poor performance or the hindrance of growth.

Web portal technology, specifically when built on a PaaS platform, removes this risk by enabling organisations to build web portals or application extensions outside of the primary application. This ensures that the organisation can continue to benefit from the upgrade paths of their primary systems, yet enjoy the features and benefits of a customised extension.

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What Types Of Web Portals Are There?

Understanding the type of web portal your organisation needs is critical to the future shape of the project. This will help identify the likely scope for the project. In terms of web portal types (business portals) they can be broadly categorised into two distinct categories.

Vertical Web Portals

Vertical web portals focus on a specific application or business function such as HR, accounting and finance, CRM, ERP, service management or warehouse management. They enable users from both inside and outside the business function to see, edit and contribute to processes within that given application(s).

For example, an organisation may wish to offer a customer web portal that enables suppliers to read, add to or amend order status details and other related information.

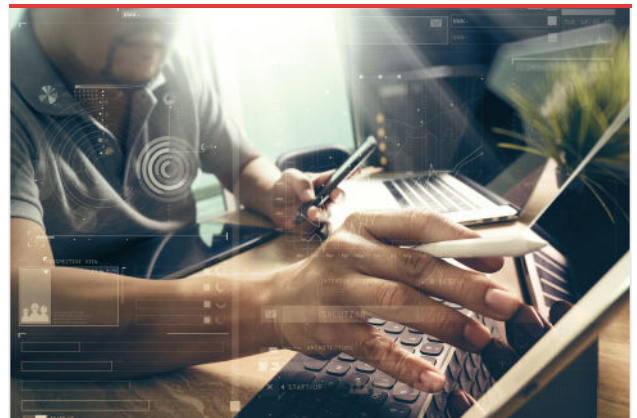
Horizontal Web Portals

Horizontal web portals provide users with the ability to see aggregated data from multiple applications via a single view experience. This is not to say that vertical portals cannot aggregate data from other applications, but it's not their primary focus.

This type of web portal removes the need for users to log in to multiple primary business applications to read, write or amalgamate information. It can, therefore, significantly improve the productivity and performance of users.

A common horizontal web portal could take the form of managerial reporting system that presents Key Performance Indicator (KPIs) information from multiple business systems. Typically, users of these forms of web portals read/generate reports from data within the view they have, but they can also write data or start workflow processes if required.

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Identifying User Types: Authenticated/Unauthenticated Portals

Understanding the type of web portal user(s) you will have is critical to identifying the scale of the project. It highlights whether the user will need read, write, read/write access, the level of information they'll need to access and from what sources. It will also determine your user permissions, expected user load levels and your wider security strategy. However, at the very basic level of categorisation, your web portal users will either be:

- Authenticated - Users that identify themselves and therefore can update specific information e.g. Contact details within a company CRM application. This type of user can also have a tailored data view served up.
- Unauthenticated – Users that access and submit information without identifying themselves. These users will be presented with a standardised data view.

Web Portal Data

Data and the strategy that surrounds it is fundamental to the success and adoption of any web portal project. During the stakeholder interview process all systems and actual data accessed and written by users should be documented.

This will enable you to map out your data landscape and define what will be seen, used and contributed to. Furthermore, it will help you identify your data sources and any potential supporting application integration requirements.

Detailed thought should also be placed into the presentation of the data. Web portals can provide access to a deep view of data. However, in reality, users often only require limited access to data selection to perform their tasks.

To establish what your data landscape looks like, and the potential integration requirements, you can construct a tick box feedback form that lists all the applications used by the organisation. You could then ask all employees to tick which application they use, whether they input or extract data from that system and why.

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☆ Gaining Web Portal User 'Buy-in'

Web portal 'buy in' needs cultivation and, as stated earlier, this not only starts at the very beginning of the project but during the build and after deployment. Softer benefits can be easily extracted following a web portal deployment such as user satisfaction, data access and basic user login stats. However, steps should be taken to measure the more tangible benefits of the web portal such as:

- The reduction in full user licenses required for primary systems
- Reduction in back office processing of data collected 'off site'
- Greater customer engagement
- Quality of data and process efficiency
- The availability of operational information and the speed and accuracy in which decision-making has improved



🎯 Identifying the Correct Portal Software for your Organisation

There are a number of factors to consider when selecting the right Web Portal solution for your organisation. The criteria for selection will vary depending on your requirement, but the following should ensure that your final choice is future proof:

1. Ensure the web portal technology is easy to configure, use and adapt

Creating and maintaining a web portal should be easy. If the technology it is based upon requires a team of specialists to maintain and develop you will eradicate the agility the organisation can achieve through web portals.

2. Select a web portal provider that also understands application integration

Capturing, storing and viewing formation within a web portal is just the beginning for many organisations. Business processes often cross multiple systems and, as such, you will need to integrate your web portal with other database applications.

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3. The web portal provider can offer a demo license option

If the vendor claims that its web portal software is easy to use put these claims to the test. During the demo process, you will also get an idea for the level and quality of support the organisation provides and the knowledge you can access. A professional web portal technology provider will assign an account manager to you during your demo and will guide you through the use of the solution.

4. Ask to see their project scoping documentation

Evaluating a vendor's project scoping documentation is a great indicator of the quality of work that will be delivered. Web Portals are successful when they meet the exact needs of the user, so identifying if the vendors documentation adequately captures this information is an important consideration.

5. Establish the level of security features that are built into the solution

By the nature of what you are trying to achieve you will be opening up your most valuable asset e.g. your data to many different people in multiple locations. Ask for a clear and concise document stating the exact security features that come as standard with the solution.



Developing an Ongoing Strategy

Primary applications are typically designed to cope with a specific business function or process. Web portals differ in that they can evolve over time and are often comprised of a mixture of application data. Following the successful delivery of the web portal solution the project team should establish regular review meetings to discuss items such as:

- Web portal usage statistics
- Qualitative user feedback
- New feature requests
- Benefits achieved by the organisation
- Ideas and opportunities

Planning Your Web Portal Project

Before building your web portal, it's best to have a plan and a team in place. The following steps will help you to consider your business requirements and establish the resources available to make your web portal project a success.

1. Identify a software project team

To establish the extent of authenticated and unauthenticated users within your project and, more importantly, the business processes that will determine the data presented within a web portal, you need to establish a portal project team. The team can include a variety of contributors, but, as a general guide, you should look to form three core groups:

Users – Directors, Management, Team Members

These contributors are the core users that will help identify what data will need to be presented, where and how. Ultimately, this is the user base of your web portal and, therefore, the information they extract will determine portal adoption.

This can include how they process data now, how they would like to process data and the challenges the current system provides. Great emphasis should be placed on the physical interactions of current users within your existing systems and how this can be brought together for the perfect 'single view'.

Project Manager(s)

These stakeholders play a critical role in communicating progress between IT specialists and users. Effective portal adoption is partially influenced by the perceived ownership over the actual build of the portal itself. This is one of the most overlooked aspects of web portal development. For true adoption, the user must feel that it was built to their specification.

Project Managers should look to establish and facilitate regular focus group meetings between the users and IT specialists to demonstrate progress and the relationship of deliverables to the objectives of the original web portal specification.



7 Steps to Planning Your Software

1. Identify a software project team
2. Define your goals
3. Build a road map
4. Communicate
5. Create a training schedule
6. Test before implementation
7. Checklist

Planning Your Web Portal Project

IT Specialist(s)

This group is responsible for the build, maintenance, security and ongoing development of the web portal. Clear responsibilities should be defined and all changes should be documented and receive sign off from all the stakeholder groups e.g. Project Managers and Users. This team should also facilitate training sessions, establish support ticket mechanisms and be responsive to user feedback.

2. Define your goals

The aim at this stage is to identify key metrics and goals that align with your overall business strategy, processes and growth plans. It is important that your project team is involved in this process and that key points are documented throughout. Users can ascertain the vision of the company along with the structure of current and desirable business process.

This process helps to prioritise goals and desirables in a structured order. Common goals defined in a web portal project can include:

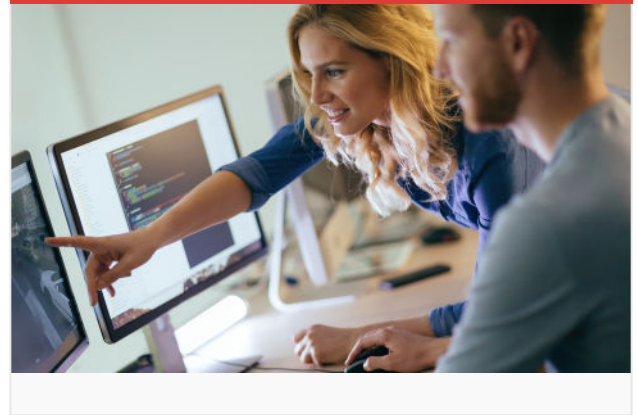
- Personalised content and information
- Central access point to business information
- Improve customer satisfaction and communication

3. Build a road map

Once the project goals have been defined, the next stage is to plan your road map to document and evaluate each process and any technical constraints that you may encounter.

The metrics and goals defined in the previous step need to be aligned with the overall business strategy and day-to-day processes with consideration for where your web portal will fill the void. Points to consider when completing your road map include:

- Who has the most experience to complete specific goals?
- Who will document the requirements?
- Do you need to integrate other systems or applications?
- What data needs to be migrated?
- What technical issues can arise?



To establish what is required from the system – the extent of business processes, number of users and data sources – you need to create a project team.

💡 Planning Your Web Portal Project

Your road map will need regular input from all your project team members, therefore it needs to be easy to understand and accessible.

4. Communicate

Communication is key to getting user 'buy-in' and making the project a success. Create a clear communication strategy to ensure that everyone in the business is prepared for the changes and engaged throughout the project.

Ideally, the communications should be sent from the Project Manager and, if needed, include the marketing team for creative input.

Each communication should highlight the key changes and functions that the asset management application will provide. Include how the business and user will benefit in the long term.

Treat each communication as an opportunity to gain employee feedback and let them know how their input has made a difference. Communications can include:

- Teaser images
- Surveys for feedback
- Incentives e.g. for best idea for an additional feature
- Training schedules

5. Create a training plan

Prior to launch you will need to create a training schedule for the employees that will be using the web portal and for the development team. Create specific programmes for each application so that each user is proficient in using the system for their role.

The training needs to be aligned with the organisations strategic goals and should include live, scenario-based sessions. Where possible, provide scenarios and quick tip videos so that users can use them as a reference point in the future.

When additional features and functionality are added provide refresher training and train new employees as part of the onboarding process.

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6. Test before implementation

Before the web portal implementation takes place, make sure that your project team undertakes a final test to ensure that it works efficiently and to iron out any problems.

7. Checklist

To ensure that the web portal project runs as smoothly as possible, create a final checklist as a point of reference. To help you, we have provided a sample check list. Once all the boxes have been ticked it's time to launch the product.



Pre-launch Checklist

- Identify a software project team
- Define operational goals
- Define application features
- Outline priorities and desirables
- Define reporting requirements
- Create a road map
- Communicate with users
- Create a training plan
- Pre-launch testing
- Provide training
- Launch application

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