

uPortal Annual Report for 2018

uPortal Steering Committee 11 July 2018

Activity covering 2017/05/01-2018/04/30

Overview

uPortal is the leading open source enterprise portal framework built by and for the higher education community. The platform itself is complemented by a wide variety of projects that make up the greater uPortal Ecosystem. The uPortal project had a strong year from May 2017 through April 2018.

- Growth: Introduction of the uPortal Ecosystem Intake Process with 4 new software products entering the process and uPortal-home successfully graduating from Apereo Incubation.
- Life: Almost 100 versioned releases of uPortal ecosystem software products.
- Participation: 7 new core contributors, 1 new core committer, 16 presentations, 1,350+ list posts, 5 calls/webinars, and 2 meetups.
- Financial responsibility: 3 sustaining subscribers and \$26,000 recurring revenue with a \$51,000 fund balance.

In the year to come, we hope to see continued growth, life, and participation in the community. We encourage community members to engage on the lists, enhance documentation, contribute a fix, or add a feature, propose a new sub-project, become an Apereo member, and become a uPortal Supporting Subscriber.

Life

The project continues to show healthy activity with releases of software products within the ecosystem. Counting core, intook, and incubating software products, and not counting open source software products in the neighborhood but not formally part of the ecosystem, there were 97 total releases. Many of these releases were updates to use more recent versions of libraries, we continue to see innovation in the uPortal user interface.

uPortal core

- [uPortal](#): 22 releases through 5.0.6 (1 major, 7 patch, 1 release candidate, and 13 milestones)

Alternative user interfaces

- [uPortal-home](#): 13 releases through 8.1.2 (2 major, 6 minor, 5 patch)
- [uPortal-app-framework](#): 16 releases through 9.1 (5 major, 5 minor, 6 patch)

Portlet releases

9 Portlet software products saw at least one release, with 36 total releases.

- [AnnouncementsPortlet](#): 10 releases through 2.3.6 (1 minor, 9 patch)
- [CalendarPortlet](#): 4 releases through 2.5.2 (1 minor, 3 patch)
- [FeedbackPortlet](#): 3 releases through 1.2.2 (1 minor, 2 patch)
- [JasigWidgetPortlets](#): 1 minor release through 2.3
- [NewsReaderPortlet](#): 7 releases through 5.0 (1 major, 1 minor, 5 patch)

- [NotificationPortlet](#): 6 releases through 3.2.1 (2 minor, 4 patch)
- [SimpleContentPortlet](#): 6 releases through 3.1 (1 major, 3 minor, 2 patch)
- [WeatherPortlet](#): 2 patch releases through 1.1.7
- [WebProxyPortlet](#): 2 patch releases through 2.3.2

Supporting software products

- [Resource-server](#): 5 releases through 1.2 (2 minor, 3 patch)

Security vulnerabilities handled

- 2017-09-26 Feedback portlet injectable fixed in Feedback Portlet 1.2.1 (Aaron, Drew, ChristianM)

Growth

A variety of software products complement the core platform to make up the greater uPortal ecosystem. This past year we implemented the [uPortal Ecosystem Intake Process](#) (see [article](#)) for sub-projects that are intended to be part of this greater ecosystem. The process sets certain stipulations that make incubation within the uPortal ecosystem easier and more expedient yet still conform with the greater [Aperero Incubation Process](#). This makes it easier for organizations and individuals to start collaborating on new projects at a very early stage.

After intake, projects are hosted in the [uPortal-contrib](#) GitHub organization. There are currently 4 projects.

Graduating incubation

- [uPortal Home](#)

Entering intake

- [uportal-setup-scripts](#)
- [Soffit-kotlin-example](#)
- [ESUP-filemanager](#)
- [uPortal-web-components](#)

Participation

The core uPortal platform project added 1 new committer and 7 new contributors, with 18 total contributors. This year saw an increase in direct participation by community members in France, through submissions to the new [Intake Process](#) and translations of documentation. The community continues to participate in a variety of venues, including mailings lists, webinars, meetups, and conferences.

Committers

For core uPortal, there are currently 14 [active committers](#), 1 of them new.

New committer:

- Jim Helwig ([2017-07-19](#))

5 additional people are committers emeriti.

Contributors

In core uPortal, there are 18 [active contributors](#), 7 of them new.

Contributors this year to core uPortal (* indicates new):

- Ludovic Auxepeales
- Chris Beach*
- Josh Brudnak*
- Colin Campbell*
- Christian Cousquer
- Nisith Dash*
- Mairi Fraser*
- Benito Gonzalez
- Allan Jackson*
- KaJuan Johnson*
- Christian Murphy
- Gary Roybal
- Andrew Petro
- Brandon Powell
- Corey Rowe
- Jonathan Tran
- Timothy Vertein
- Drew Wills

(Note that this is counting committers and contributors in the core uPortal platform itself and does not account for contributors and committers in the other ecosystem projects.)

List subscribers/posts

The discussion lists continue to be active with an increase in traffic of more than 10% over last year. There are hundreds of subscribers and over 1,300 posts between the two lists.

- uportal-user: 438 subscribers, ~720 posts
- uportal-dev: 259 subscribers, ~659 posts

Calls or webinars

Our globally distributed community continued to meet virtually for topic-specific webinars and general briefings. Given the difficulty some members have in attending meetups or conferences, it will be important for us to look at more opportunities for virtual meetups.

- 2 webinars
- 3 Unicon uPortal open source support briefings
- 11 uPortal Steering Committee meetings (closed)

Meetups

In addition to the traditional collaboration days immediately following Open Apereo, we held a multiday developer gathering at UW-Madison.

- [uPortal Collaboration days at Open Apereo 2017](#) - 10 attendees over 1.5 days
- [uPortal Developer Days at UW-Madison in December 2017](#) - 28 attendees (18 in person, 10 remote) over 2.5 days

Presentations

uPortal community members continue to be major contributors to the annual conference. This was the second year that someone from the United States travelled to Paris to participate in ESUP-Days.

- 15 uPortal-related presentations at Open Apereo 2017
- 1 presentation at ESUP-Days #25

Collaboration tools

We continue to look at ways to make collaboration easier. Efforts continue towards building out the uPortal manuals using GitHub. Newly introduced [uPortal Community](#) and [uPortal Steering Committee](#) Google team drives welcome collaboration and sharing of artifacts in less source-code-centric ways. This tooling has already proven conducive to sharing local [user research findings from uPortal adopters](#).

Financial responsibility

Supporting Subscription Subscribers

Institutions can sustain the project through the [uPortal Supporting Subscription program](#), a rider to the [institutional Apereo membership](#). uPortal added 1 subscriber to a total of 3 with annual revenue of \$26,000 and a fund balance of \$51,000.

Current uPortal Supporting Subscribers:

- University of Wisconsin-Madison (uPortal Champion)
- Oakland University (uPortal Booster)
- Brigham Young University (uPortal Friend)

The funds are managed by the uPortal Steering Committee, guided by the subscribers and the community at large. The uPSC has adopted the strategy of accumulating the funds with the goal of reaching a stabilizing asset balance and working towards a level of recurring revenue that will enable a sustainable application of funds.

In the year to come, the project hopes to reach a threshold of recurring revenue to afford funding a full-time Foundation position. The uPSC will work with the community to determine what this resource will be charged with doing. Ultimately this person's efforts will focus on making the uPortal project stronger.

Going forward

As we look to the year ahead, it can be beneficial to think about possible challenges and opportunities the project faces. The following items have been offered up by members of the community.

Challenges

- **uPortal is too difficult to adopt.** It's not enough a turn-key, productized, ready-to-deploy solution to meet some modern expectations about the product adoption and implementation process in higher edu.
- **uPortal is not available as a SaaS in-the-cloud solution**, the way that some of higher ed now prefers to adopt some software.
- The [uPortal project page on apereo.org](#) is **outdated, confusing, and unattractive**. As one of the first places people may look when trying to learn about uPortal, it does not instill confidence.
- uPortal and/or its current set of capabilities is **not widely known** beyond the community of current adopters.
- **Documentation** continues to be a challenge. The project is challenged in providing and maintaining comprehensive documentation; adopters are understandably challenged by lack of this documentation.
- **We do not have an effective way to identify and reach out to adopters.**
- uPortal is a Java Portal. A Portlet Container. It supports versions 1 and 2 of the Java Portlet specification. Java Portlet specification v3 has released. It's not clear that uPortal will support version 3 of this specification (or that there'd be any interest from adopters in this), but this also challenges product identity -- **if the future of uPortal isn't around future versions of the Portlet specification, what is it around?**
- uPortal is a Java Portal. A Portlet Container. It relies upon Spring PortletMVC as the framework for some of its Portlets. However, Spring Framework support for Portlets is not continuing in latest and future Spring Framework versions, with the last Spring Framework versions supporting Portlets reaching end-of-support in 2020. This **challenges uPortal to implement Java Portlets in ways supported going forward, or to transition away from Java Portlets as a primary way of developing and delivering experiences in uPortal.**
- Despite the major effort to simplify uPortal and organize the code into smaller modules, it remains a **monolithic Java application** that consumes significant resources, making it difficult to containerize and scale, limiting the ability to apply DevOps, continuous integration, and continuous delivery practices.
- **CVEs** (Common Vulnerability and Exposures identifiers, a software industry-standard way of registering and referencing specific security vulnerabilities) are prohibitively difficult to acquire. This limits effectiveness of communication about security.

Potential opportunities

- **Achieving critical mass in sustaining subscription revenue** to convert those funds into effort advancing the project.
- A new round of product adoption could yield a new round of resources, experiences, life for the project, which could **reduce barriers to adoption and lead to more adoption**. A virtuous cycle could ensue.
- Adoption is easier than ever before, with transition to a cleaner distinction between local configuration and customization (adopters modify these locally) vs open source software product artifacts (adopters do not typically modify these locally). This has already made adopting and upgrading open source

software artifacts less effort and more declarative. The opportunity is to go further with this, building upon the progress so far in e.g. “uPortal-start” as a more elegant and modern way to adopt the product.

- Birth of intake, contrib, ecosystem, and attic concepts and processes sets the stage to **more clearly welcome, characterize, and communicate about projects in the uPortal ecosystem.**
- Turning focus away from Java Portlet specification support is an opportunity to **focus more open-endedly on what features, content types, ways of developing and integrating, will be most effective for uPortal adopters.**
- Co-locating documentation and developing it in the same contexts as the software being documented (so, in GitHub repositories rather than in an external wiki) creates opportunities to include documentation more directly in the software development process and to **make contributing to documentation more attractive and productive** for code contributors.
- Opportunity to **generalize security handling and [CVE provisioning at Apereo Foundation level](#)**. For limited additional effort beyond what uPortal would need to do to solve these problems locally, Apereo could be adding value to CVE numbering and security handling Foundation-wide.
- Adopt and transition to [Discourse](#) for superior discussion forums solution.
- Socialize project practices with other Apereo projects.

Calls to action

The success of the uPortal project is a direct result of the contribution of the members of the uPortal Community. Through our collaborative actions, we continue to move forward as individuals, as institutions, and as a community. What actions will you take this year?

- **Engage on the lists** - Share your implementation plans or ask questions on [uportal-user@](#); collaborate openly beyond just uPortal on the [open@](#) list; collaborate on new features on the [uportal-dev@](#) list; find out about what is going on across Apereo via the [announcements@](#) list; send a brief newsletter article about how your institution is using uPortal to [newsletter@apereo.org](#); write a post for [apereo.github.io](#) and then link it from a post on the relevant list.
- **Enhance documentation, contribute a fix, or add a feature** - The [uPortal documentation](#) is now in GitHub and is easy to edit inline. For bugs, we are increasingly using GitHub issues; we welcome your fixes. Talk about uPortal.
- **Propose a new sub-project** - Even at the earliest stages, we encourage you to start collaborating by proposing a new project via the [uPortal's new Ecosystem Intake Process](#). If you locally see a need, it's very likely that another adopter may have that need as well. By starting in the open, others can help craft a solution together.
- **Become an Apereo member** - If your institution is not already a [member of Apereo](#), encourage your management to consider it. Also, let the [uPortal Steering Committee](#) know and we would be happy to reach out to them! You can also become an individual member through [Friends of Apereo](#) program and support Apereo's recognition programs as well as vote for a board representative.
- **Become a uPortal Supporting Subscriber** - Have your organization join [uPortal's Supporting Subscription program](#) for as little as \$1,000. If your institution is already subscribing, increase your commitment. This builds an essential, sustainable recurring revenue for resourcing the uPortal project with the goal of adding a full time staffer focused on carrying the uPortal open source project forward.