



Electronic Portfolio Solutions: Performance and Requirements Analysis

This document is designed to help you identify if the Portfolio solution your organization is reviewing meets current or future requirements. Use the rating system to evaluate each key feature on a scale of **1-5** with **5** representing a superior implementation and **1** being unacceptable.

Portfolio Owners	Key Features Availability	
	Product 1	Product 2
Is the portfolio designed to be used by the owner throughout their lifetime?	1 2 3 4 5	1 2 3 4 5
Can the portfolio owner use it in conjunction with multiple organizations over the owner's lifetime?	1 2 3 4 5	1 2 3 4 5
Does the application support usage in high school, the college admissions process, undergraduate and graduate school, with professional associations, for job searches, and with prospective and current employers?	1 2 3 4 5	1 2 3 4 5
Is the portfolio limited to a single use design, constrained to a single organization or built around only a single academic process or specialty?	1 2 3 4 5	1 2 3 4 5
Is the portfolio portable? Can the owner take it with them when they leave the current organization?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners define their own goals, standards, competencies, objectives, etc?	1 2 3 4 5	1 2 3 4 5
Do portfolio owners have the ability to resize images in the portfolio?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners create folders to organize their artifacts? Can the artifacts be easily moved from folder to folder?	1 2 3 4 5	1 2 3 4 5
Does the portfolio product support the uploading of a website and then displaying the site through a portfolio?	1 2 3 4 5	1 2 3 4 5
Are all feedback by reviewers and reflections by the portfolio owner dynamic and available to the portfolio owner at all times?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners control who views each of their portfolios?	1 2 3 4 5	1 2 3 4 5
Do portfolio owners have an access log that tells them who is viewing each of their portfolios by date?	1 2 3 4 5	1 2 3 4 5
Can expiration dates for viewing be set by owners for each reviewer?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners download any portfolio to the local desktop as a fully functioning website?	1 2 3 4 5	1 2 3 4 5

Portfolio Owners	<i>Key Features Availability</i>	
	Product 1	Product 2
Can portfolio owners limit the ability of reviewers from outside their organization to download their portfolio?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners limit the ability of reviewers from outside their organization to view feedback?	1 2 3 4 5	1 2 3 4 5
Can the portfolio owner make all or a portion of a portfolio available to multiple reviewers at once?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners limit the ability of reviewers from outside their organization to view reflections?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners limit the ability of reviewers from outside their organization to give feedback?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners control whether outside reviewers can view feedback?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners control whether outside reviewers can view self ratings?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners control whether outside reviewers can view reflections?	1 2 3 4 5	1 2 3 4 5
Can the portfolio owner have an unlimited number of portfolios?	1 2 3 4 5	1 2 3 4 5
Can portfolio owners securely share portfolios with peers, groups or external e-mail recipients?	1 2 3 4 5	1 2 3 4 5
Does the portfolio support inclusion of URLs as links?	1 2 3 4 5	1 2 3 4 5
Can any word or content in a portfolio be linked without typing in a URL?	1 2 3 4 5	1 2 3 4 5
Can any URL or e-mail address entered into a template become a link?	1 2 3 4 5	1 2 3 4 5
Can the portfolio owner paste a full web page into a portfolio page?	1 2 3 4 5	1 2 3 4 5
Can portfolios that have been withdrawn from view be restored, redirected, and/or edited at any time?	1 2 3 4 5	1 2 3 4 5
Can the portfolio owner archive portfolios that are no longer needed?	1 2 3 4 5	1 2 3 4 5

Portfolio Reviewers	Key Features Availability	
	YES	NO
Can reviewers also be portfolio owners?	1 2 3 4 5	1 2 3 4 5
Can faculty create tenure or professional development portfolios?	1 2 3 4 5	1 2 3 4 5
Does the portfolio application support dynamic comment/feedback forms?	1 2 3 4 5	1 2 3 4 5
Do both reviewers and owners have the ability to create portfolios?	1 2 3 4 5	1 2 3 4 5
Do reviewers have a tool to organize portfolios under review or is it just managed via email?	1 2 3 4 5	1 2 3 4 5
Can reviewers set up a folder system within their reviewer account to organize the portfolios they have permission to review?	1 2 3 4 5	1 2 3 4 5
Is the portfolio limited to only one rubric?	1 2 3 4 5	1 2 3 4 5
Can different rubrics be associated to different sections of the portfolio?	1 2 3 4 5	1 2 3 4 5
Can a rubric or scale be used to evaluate an entire portfolio?	1 2 3 4 5	1 2 3 4 5
Can rubrics and scales be used to evaluate categories and artifacts throughout a portfolio?	1 2 3 4 5	1 2 3 4 5
Does the application support unlimited numbers of rubrics?	1 2 3 4 5	1 2 3 4 5
Can rubrics support multiple criteria?	1 2 3 4 5	1 2 3 4 5
Can an unlimited number of rubrics and scales be easily designed and made available in a library to be attached to any template or any portion of a template?	1 2 3 4 5	1 2 3 4 5
Can templates be built with any set of goals, standards, competencies, objectives, etc.?	1 2 3 4 5	1 2 3 4 5
Can a template have a reviewer-defined style of presentation and/or can the reviewer allow the owner to choose their own presentation style?	1 2 3 4 5	1 2 3 4 5
Does the application include a design suite which allows template builders to determine where portfolio owners can attach files, items and websites; reflect; and/or self-rate?	1 2 3 4 5	1 2 3 4 5
Can templates include detailed instructions to portfolio owners?	1 2 3 4 5	1 2 3 4 5
Does the design suite allow template builders to determine whether owners are able to edit (vs. read-only), delete and/or add to the template?	1 2 3 4 5	1 2 3 4 5
Can reviewers give feedback to portfolio owners as often as they wish?	1 2 3 4 5	1 2 3 4 5
Is the feedback always date stamped?	1 2 3 4 5	1 2 3 4 5

Portfolio Reviewers	<i>Key Features Availability</i>	
	YES	NO
Can reviewers give private feedback (only shared with the owner)?	1 2 3 4 5	1 2 3 4 5
Can reviewers give feedback to the owner that others in the organization can view?	1 2 3 4 5	1 2 3 4 5
Can portfolios be shared with both internal (reviewers from within the organization) and external (custom reviewers from outside the organization) reviewers?	1 2 3 4 5	1 2 3 4 5
Is each group able to rate and review the portfolio?	1 2 3 4 5	1 2 3 4 5
Do external reviewers have access to the same measures used by internal reviewers?	1 2 3 4 5	1 2 3 4 5
Can reviewers give public feedback (owner can share with anyone)?	1 2 3 4 5	1 2 3 4 5
Can assessments always allow narrative feedback and utilize rubrics or scales as well?	1 2 3 4 5	1 2 3 4 5
Can template builders direct where feedback is permitted?	1 2 3 4 5	1 2 3 4 5

Institutional and Portfolio Administrator Requirements	<i>Key Features Availability</i>	
	YES	NO
Can reviewers and organizations create templates for portfolio owners?	1 2 3 4 5	1 2 3 4 5
Can organizations create reviewer accounts and define a permission and trusted hierarchy?	1 2 3 4 5	1 2 3 4 5
When feedback on individual performance is provided for assessment, does it appear immediately upon completion?	1 2 3 4 5	1 2 3 4 5
Can any document be shared as “common artifacts” in a template?	1 2 3 4 5	1 2 3 4 5
Can portfolio administrators determine which reviewers can design templates and/ or rubrics?	1 2 3 4 5	1 2 3 4 5
Is there a messaging system that allows critical and informational messages to be sent to portfolio owners and reviewers within the organization?	1 2 3 4 5	1 2 3 4 5
Does the Portfolio application collect demographic data tied to performance results by one or more selected data filters without the knowledge of or notification to the Portfolio owner?	1 2 3 4 5	1 2 3 4 5
Can the application be customized to include branding elements such as your organization’s logo or crest so it can be viewed by portfolio owners and reviewers within their accounts?	1 2 3 4 5	1 2 3 4 5

Assessment	<i>Key Features Availability</i>	
	YES	NO
Is the portfolio designed for processes beyond assessment tasks (such as job search)?	1 2 3 4 5	1 2 3 4 5
Does the portfolio allow performance measures to be easily created and reused?	1 2 3 4 5	1 2 3 4 5
Is the portfolio reviewer able to reassess?	1 2 3 4 5	1 2 3 4 5
Does the portfolio support recurring assessments to demonstrate longitudinal progress?	1 2 3 4 5	1 2 3 4 5
Can narrative feedback (non-rubric assessments) be aggregated?	1 2 3 4 5	1 2 3 4 5
Does the application provide free assessment and reporting capability?	1 2 3 4 5	1 2 3 4 5

Analysis and reporting	<i>Key Features Availability</i>	
	YES	NO
Does the application support longitudinal and cross-sectional analysis?	1 2 3 4 5	1 2 3 4 5
Is assessment and reporting functionality included in all reviewer accounts?	1 2 3 4 5	1 2 3 4 5
Does report generation allow for determining multiple criteria?	1 2 3 4 5	1 2 3 4 5
Does the application support both numeric and graphic reports?	1 2 3 4 5	1 2 3 4 5
Are summary results available for individuals or groups?	1 2 3 4 5	1 2 3 4 5
Can reports cover multiple assessment results of the same rubric over time by mean, criterion?	1 2 3 4 5	1 2 3 4 5
Can any report be saved as a static HTML document?	1 2 3 4 5	1 2 3 4 5
Can data be imported from spreadsheets, databases, and student management systems?	1 2 3 4 5	1 2 3 4 5

Advanced Technology	Key Features Availability	
	YES	NO
Is the portfolio built with the latest technology such as Web Services as a core development directive?	1 2 3 4 5	1 2 3 4 5
Are integrations all custom hard-coded or is the solution based on easy to deploy web-services configurations?	1 2 3 4 5	1 2 3 4 5
Does the system for managing portfolio data meet security requirements for your organization?	1 2 3 4 5	1 2 3 4 5
Are the intellectual assets that are stored within the portfolio as secure as data for major financial institutions?	1 2 3 4 5	1 2 3 4 5
Is the data stored in a world class, state-of-the-art, secure, 24 x 7, Class 1 Data Center?	1 2 3 4 5	1 2 3 4 5
Does the portfolio application have a published API?	1 2 3 4 5	1 2 3 4 5
Does the portfolio product support WebDAV for drag and drop file management?	1 2 3 4 5	1 2 3 4 5
Does the portfolio application support online editing?	1 2 3 4 5	1 2 3 4 5
Has the portfolio application been developed based on feedback from educators worldwide?	1 2 3 4 5	1 2 3 4 5
Has the application been sold outside of the United States?	1 2 3 4 5	1 2 3 4 5
Has the application been used in production environments in large universities?	1 2 3 4 5	1 2 3 4 5
Does the portfolio support any digital file type?	1 2 3 4 5	1 2 3 4 5

We will be happy to work with you and help interpret the results of this product analysis. If you have questions or comments about this document, please call us at 412-487-8700.

Thank you.



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