Abstract: Purpose - This article is the first in a four-part series that aims to illustrate the processes involved in planning a portal and creating a portal definition document. Design/methodology/approach - Based on a review of the academic and industry literature and using a case study, the authors share their experience in planning the Florida ExpertNet Research portal. Findings - Portal development is a complex and costly endeavor that requires meticulous planning and design. As with any system development initiative, the time and energy spent in the planning process is reflected in the success or failure of the end product. Creating a portal vision is the first step in developing the portal definition document and includes the following areas: mission statement, objectives, needs assessment, creative layout, benefits, and funding and sponsorship. Originality/value - This series will be useful to the information professional who is contemplating portal development and may be used as a model in developing a blueprint - the portal definition document. Whether the information professional is considering doing the development or outsourcing, it is important to understand the architectural requirements of a portal.