



Fun With Portal Home

This worksheet is a supplement to Kolme University's Fun With Portal Home. In this course, we are solving the business need of: "I need a way to direct my team to a custom-branded landing page that contains easy-to-use navigation, resulting in a simplified experience that showcases the areas of AdaptiveWork most common to their role within the organization."

Fun With Portal Home Steps:

- Install the Portal Home app from the AdaptiveWork Apps Marketplace.
- Configure your company picture and button colors.
- Level Up! Apply CSS and HTML to your portal page to make it more efficient.
- Test & Confirm that the conditions applied to the portal buttons are successful.

Prerequisites

AdaptiveWork Environment

- ✓ AdaptiveWork administrative access
- ✓ AdaptiveWork environment - Sandbox recommended
- ✓ Quota allotment for 1 custom action, 3 custom panels, 1 custom field
- ✓ Super User and Non-Super User login
- ✓ Custom Action already configured in your system
- ✓ Background Image and HEX color
- ✓ Basic AdaptiveWork Technical Skills

Components of the Configuration

Configuration	Object	Name	Purpose
Custom Action	Organization	New Portal Announcement	An Admin-only action which updates the Portal Home announcements. New announcements are prefixed with the name and date/time stamp of the person who logged the announcement.
Custom Panel	Organization	Portal Home	The Portal Home page. Highly configurable. We will save-as for a Project Manager and a test portal; 3 portals in all. <i>*Always check with your IT or Infosec team when using External Scripts.</i>
Custom Field	Organization	Latest Announcements	Houses the announcement text.
Standard Field	Organization	Custom Icon	Houses the image(s) for the portal background.



Fun With Portal Home

Use this section during the “Stop and Reflect” portion of the course to fill in your answers:

Have you had feedback on the Home Page from AdaptiveWork users in your organization? What types of items are your End-Users looking for to help streamline their day-to-day in AdaptiveWork?

➤ _____

Have you explored the AdaptiveWork Apps Marketplace?

➤ _____

What types of background images would look good on your portal page? Should each profile have a different image (Team Member vs Senior Leadership)?

➤ _____

What types of “buttons” would be most helpful to your end-users? Should different profiles have different buttons?

➤ _____

Now that you have seen what some possibilities are, where would you like to take your portals?
Remember to always check with your IT or InfoSec team when using external scripts!

➤ _____

Need Help?

Looking to learn more with these or other AdaptiveWork configurations? Check out our additional Kolme University courses and learning paths to gain in-depth knowledge or to engage our experts: PPMAnswers@Kolmegroup.com

About Kolme University

Kolme University is the educational branch of Kolme Group, a team of experienced project and portfolio consultants who will help you triumph ahead of schedule.

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