



## 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 Clarizen most common to their role within the organization."

### Fun With Portal Home Steps:

- ☐ Install the Portal Home app from the Clarizen Apps Market Place.
- ☐ 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

Clarizen Environment

- ✓ Clarizen administrative access
- ✓ Clarizen 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 Clarizen 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 Clarizen users in your organization? What types of items are your End-Users looking for to help streamline their day-to-day in Clarizen?

➤ \_\_\_\_\_  
\_\_\_\_\_

Have you explored the Clarizen Apps Market Place?

➤ \_\_\_\_\_  
\_\_\_\_\_

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 Clarizen configurations? Check out our additional Kolme University courses and learning paths to gain in-depth knowledge or to engage our experts:

[PPMAnswers@Kolmegroup.com](mailto:PPMAnswers@Kolmegroup.com)

### About Kolme University

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