



Enhancing Portal and User Experience in SmartSimple Cloud

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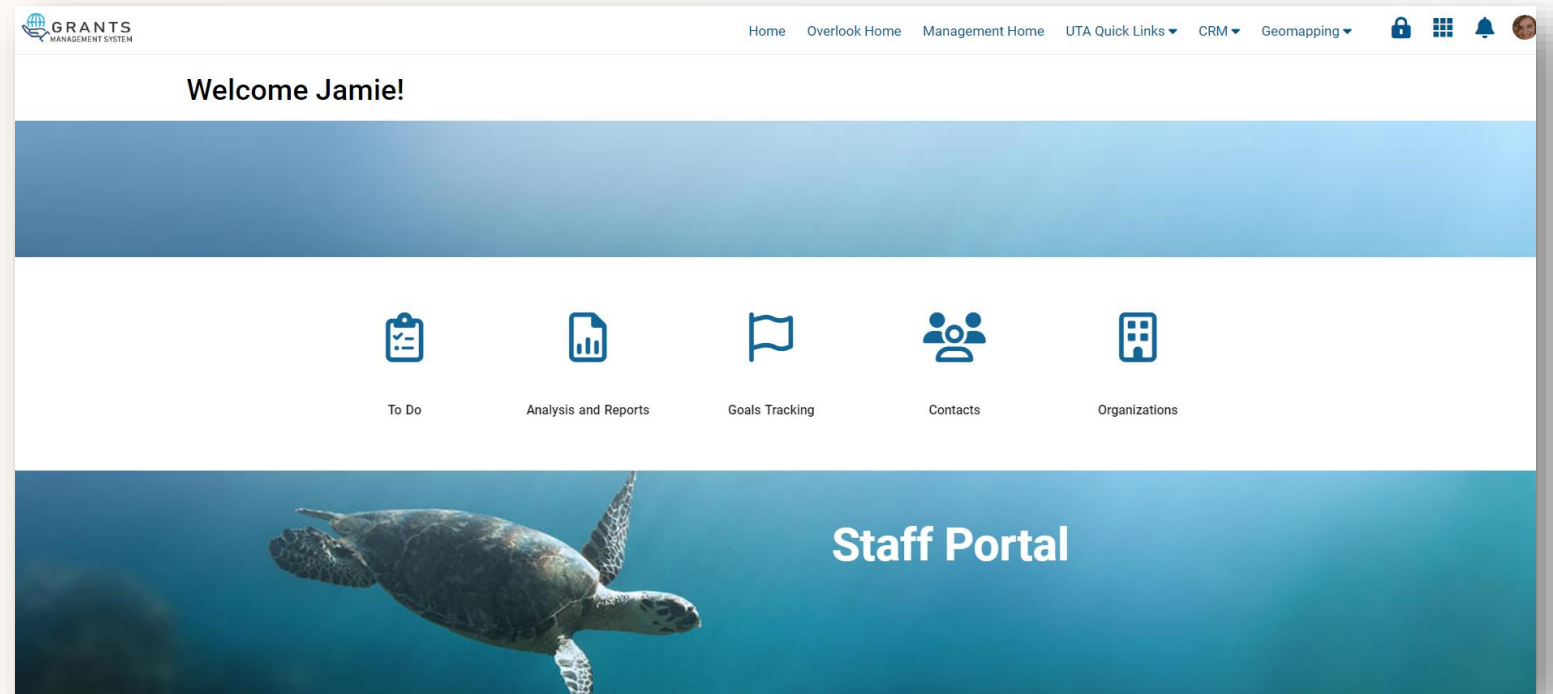
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What is a Portal?

A Portal is the graphical user interface that a user sees upon login to a SmartSimple Instance.

The Portal interface for each user is dependent on the user role and how that role interacts with the system.



Portal Benefits

- Provide a single point of access for commonly used information
- Highlight, visualize and aggregate data for improved insights
- Present data unique to each user's role
- Enable enhanced health and status monitoring
- Improve user experience
- Allow improved collaboration among teams

Portals vs Dashboards – What's the difference?



A **portal** acts as a gateway to various resources, information and tools. Portals aggregate content from multiple sources including list views, links to commonly-used data, reports and other pages.

A **dashboard** is a kind of portal page that presents data visualizations such as key metrics, performance indicators and analytics in a clear and concise way. It focuses on providing an overview of specific data and trends.

Key Portal Elements



Graphs



Charts



Photos



Media Files



Shortcuts



Text Templates



List Views



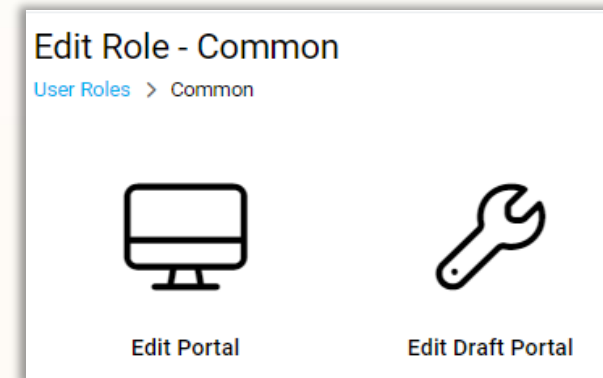
Custom Links

Creating Portals – Common Role is Recommended



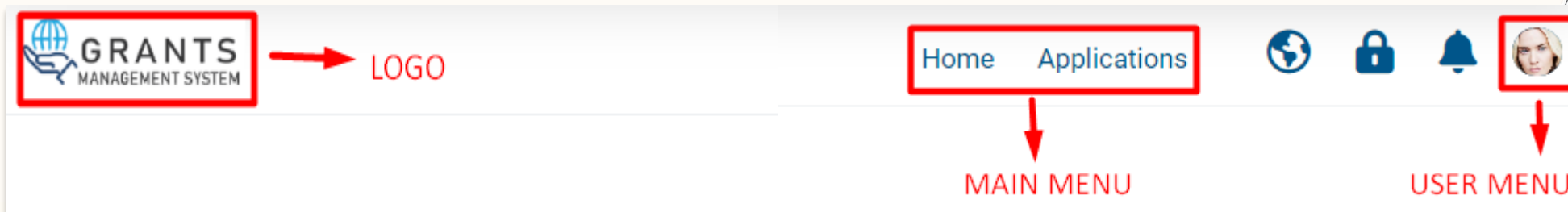
User roles organize or group similar users together and, in conjunction with permissions and other logic, control what users can see and do in SmartSimple.

You can create a portal on the **Common** role which is aggregated, meaning assets are shared across multiple roles. This is considered best practice, as it allows you to share portal elements across roles without duplicating efforts.



Portal Navigation

- **Organization Logo**
 - By default, system logo will appear in the top left of the header
- **Main Menu**
 - The main menu will appear in the center of the top section
 - The main menu is a link to either a single page or submenus
- **User Menu**
 - The user menu appears on the far right and will display your initials or photo



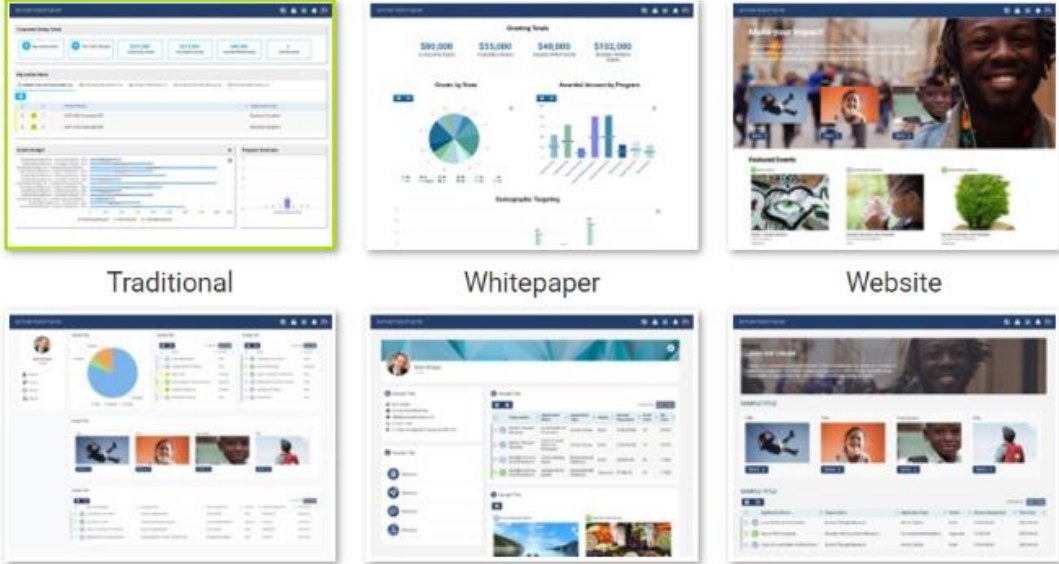
Portal Page Layout

The body of the Portal Page contains sections. Each section can have Charts, Graphs, Shortcuts and List views, as well as additional sub-sections.

SmartSimple provides some pre-defined templates for quick portal creation.

Content Type: Single Page Sections Sub-Menus under Portal Header Menu

Theme:



The image displays six preview thumbnails of portal page layouts arranged in a 2x3 grid. The top row includes 'Traditional' (a standard dashboard with a sidebar and multiple content blocks), 'Whitepaper' (a layout featuring a large header image, a 'Reading Time' indicator, and a 'Download' button), and 'Website' (a layout with a large hero image and a grid of smaller content cards). The bottom row includes 'Overlook' (a layout with a prominent pie chart and a list of items), 'Portfolio' (a layout with a large header image and a grid of smaller content cards), and 'Management' (a layout with a large header image and a grid of smaller content cards).

Traditional Whitepaper Website

Overlook Portfolio Management

Demonstrating Functionality



Home Applications



Join our cause.

Giving to our communities is an important part of life at SmartSimple. Our people are committed to supporting organizations in need and being a driving force for positive change. We believe in our responsibility to help play an active part in nurturing communities across the globe.



Funding Opportunities



Manage My Applications



Manage My Profile



Resources

Guidelines for Portal Design



**Understand
Your
Audience**



**Aim for
Simplicity
and Clarity**



**Design for
Visual
Appeal and
Emotional
Impact**



**Consider
Balance and
Alignment**



**Ensure Text
Readability**

Guidelines for Portal Design



**Follow
Accessibility
Standards**



Utilize Icons



**Maintain
Consistency**



**Test and
Iterate Your
Design**

Accessibility Resources

01 WebAIM Contrast Checker –

<https://webaim.org/resources/contrastchecker/>

02 Accessibility tools and site readers –

Wave Toolbar, Google Lighthouse, SiteImprove

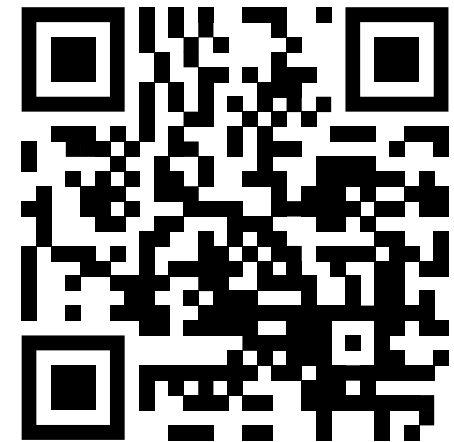
03 SmartSimple Wiki –

<https://wiki.smartsimple.com/wiki/Accessibility>

Q & A: What else would you like to know?

Thank you for your time and participation today!

Scan the QR code to access our Linktree, where you'll find links to our company website, contact details, and social media platforms!



Please feel free to reach out with any additional questions: jamie.neel@etranservices.com