

# Projectile Version 5.9

The integrated total solution for service providers: projects, processes, knowledge.

# Help, Part 11: Portals

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### **11.1 Portals**

In Projectile, administrators can create and manage portals for any user group. The portals allow quick access to functionalities (such as the time tracker or the absence request), standard evaluations (see Help, part 9) or self-defined queries and reports (see Help, part 10).

The portals consist of a functionality to show and hide the portals (green), the "portal bar" (blue) with the defined portals, the individual active portals (orange) and an "edit menu" for the portal (red):

Portal	MPM I			S minutes	- real court				Provid a line Provi				
Aktive K	lundenproje	kte											
PDF	XLS												
8 2	80											Projektübersio	cht
	Nummer	Description	Status	Customer	Begin planning	End planning	Plan [h]	Actual [h]	Differenz [h]	Abrechenbar [h]	Abrechnet [h]	Rest [h]	
1				Sum			3.945,00	518,42	3.426,58			3.159,75	
2				ATB Autobau AG			768,00	49,42	718,58			728,00	
3	005	Einführung EPM	Advance	ATB Autobau AG	05.12.2019	10.03.2020	216,00	26,25	189,75	26,25	72,00	212,00	
- 4	025	Einführung EPM	Active	ATB Autobau AG	08.01.2020	24.02.2020	232,00	0,00	232,00	0,00	0,00	232,00	
🖾 S	050	Demo 12	Active	ATB Autobau AG	05.05.2020	30.07.2020	40,00	15,17	24,83	18,17	0,00	12,00	
0	058	Einführung EPM	Active	ATB Autobau AG	15.06.2020	21.07.2020	256,00	0,00	256,00	0,00	0,00	256,00	
2 7	067	Tickets	Active	ATB Autobau AG	04.08.2020	31.08.2020	24,00	8,00	16,00	8,00	0,00	16,00	
8				CSB Consult Be			283,00	18,50	264,50			256,00	
9	019	Entwicklung Mo	Active	CSB Consult Be	09.12.2019	19.12.2019	27,00	18,50	8,50	0,00	0,00	0,00	
10	061	Einführung EPM	Active	CSB Consult Be	22.06.2020	30.10.2020	256,00	0,00	256,00	0,00	144,00	256,00	
E 11				CSH Consult AG			1.380,00	267,00	1.113,00			1.177,25	
12	001	Entwicklung Mo	Active	CSH Consult AG	02.12.2019	20.09.2020	240,00	70,75	169,25	46,75	0,00	194,00	
13	002	Entwicklung Mo	Active	CSH Consult AG	04.12.2019	24.01.2020	230,00	68,25	161,75	69,50	0,00	179,00	
14	003	Entwicklung Mo	Advance	CSH Consult AG	09.12.2019	28.02.2020	230,00	52,50	177,50	52,50	0,00	184,00	
15	011	Entwicklung Mo	Advance	CSH Consult AG	02.01.2020	27.03.2020	242,00	14,00	228,00	14,00	0,00	232,00	
16	014	Einführung Proj	Active	CSH Consult AG	06.12.2019	25.01.2020	224,00	27,00	197,00	27,00	6,25	200,00	
17	045	Einführung EPM	Active	CSH Consult AG	12.03.2020	21.04.2020	214.00	34.50	179.50	33.25	10.00	188.25	

# **11.2 Create Portals (Query)**

In the following example, we create some portals, save them as templates and assign them to a user group. After login, the portal bar is first displayed (if necessary) and...



You can then create a new portal in the light grey square.

S	Di, 26.11.2019 KW48 🙁 002 Schaub Peter - 🕐 - 🕛	Guchen Dokumenttyp.
++	🖓 Startseite	

The portal is now created and gets the name "Home\*" from the system, where the \* is a counter for all created portals.

S	▶ Di, 26.11.2019 KW48 🙁 002 Schaub Peter - ⑦ - ()	Home 66	Guchen	Dokumenttyp. Q
**	🗙 🔟 Portal Home 66			□☆□
				-

The portal is then renamed using the function "Rename portal" ...

X iii Portal Home 99	
	📝 Rename Portal
	as Portal
	Delete Portal

... (here "Tab 2") and the dialogue is confirmed. The length of the individual portals in the portal bar is limited to about 8 characters and the full name is then only displayed in the tooltip or the detail header.



The actual setup of the portal begins with the "plus" symbol.



In the following dialog you can choose between the options "Query" (from the Query Manager) or "Evaluation" (from the standard evaluations). In the first

example a query (the example from Help, Part 10, Section 10.3.1) is to be used.

After selecting the "Query" option ...



... all available queries from the Query Manager are listed and one of the queries is selected. "Available" means that the query is available and the user has rights to this query.



The result of this query is then displayed directly as a portal  $\dots$ 

79	91043	3526-0										
3	6.	Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exter	Unit	Project managers	Planning time
3	1	008	BeingPlanned	Einführung Fibu		05.12.2019	10.01.2020	PBA Privatbank	V	Beratung	Schaub Peter	232:00
1	2	013	Passive	Einführung EPM		05.12.2019	28.02.2020	ATB Autobau AG			Schaub Peter	232:00
	3	016	Passive	Entwicklung Mo		25.11.2019	20.03.2020	MBG Maschinen			Schaub Peter	244:00
]	4	020	Passive	Einführung EPM		06.01.2020	12.02.2020	CSH Consult AG		Firma 2	Schaub Peter	232:00
	5	026	Passive	Einführung EPM		20.01.2020	27.03.2020	ATB Autobau AG			Schaub Peter	232:00
1	6	027	Passive	Neues Projekt	dsfhsfhrh	21.01.2020	30.04.2020	ATB Autobau AG		Beratung	Schaub Peter	316:00
1	7	029	Open	Einführung EPM		28.01.2020	27.03.2020	CSB Consult Be			Schaub Peter	232:00
1	8	033	Passive	Test		30.01.2020	27.03.2020	ATB Autobau AG		Firma 1	Dohle Hannah	12:00
1	9	034	Open	Einführung EPM		04.02.2020	11.03.2020	ATB Autobau AG			Schaub Peter	232:00
1	10	036	Passive	Test 123		13.02.2020	29.05.2020	CSB Consult Be		Beratung	Schaub Peter	00:00
1	11	037	Passive	sdtgr		13.02.2020	15.02.2020	CSH Consult AG		Firma 1	Jahnke Kevin	
1	12	038	Passive	Einführung EPM		13.02.2020	24.04.2020	CSB Consult Be			Schaub Peter	232:00
]	13	042	Open	Einführung EPM		25.02.2020	07.04.2020	CSB Consult Be			Schaub Peter	184:00
]	14	044	Passive	Test		06.03.2020	29.05.2020	CSB Consult Be		Entwicklung	Behn Arvid, Pfis	
]	15	057	Passive	PT-Projekt		09.06.2020	31.07.2020	CSB Consult Be			Schaub Peter	80:00
]	16	060	Passive	Einführung Fibu	Inhaltsbeschrei	08.01.2020	16.03.2020	CSH Consult AG		Firma 1	Schaub Peter, J	356:00

... and can still be provided with a detailed heading.

279	91043	3526-0										
213	510-0	>>20-0										
	- 40°	Number	Status	Description	Contents descriptio	Begin planning	End plann	ing	Customer	Exter	Unit	Project mana
	1	008	BeingPlanned	Einführung Fibu		05.12.2019	10.01.	2020	PBA Privatbank	V	Beratung	Schaub Peter
	2	013	Passive	Einführung EPM		05.12.2019	28.02.	2020	ATB Autobau AG	~		Schaub Peter
	3	016	Passive	Entwicklung Mo		25.11.2019	20.03	2020	MBG Maschinen	1		Schaub Peter
	4	020	Passive	Einführung EPM		06.01.2020	12.02.	2020	CSH Consult AG	-	Firma 2	Schaub Peter
	5	026	Passive	Einführung EPM		20.01.2020	27.03.	2020	ATB Autobau AG	1		Schaub Peter
	6	027	Passive	Neues Projekt	dsfhsfhrh	21.01.2020	30.04	2020	ATB Autobau AG	1	Beratung	Schaub Peter
	7	029	Open	Einführung EPM		28.01.2020	27.03.	2020	CSB Consult Be	~		Schaub Peter
	8	033	Passive	Test		30.01.2020	27.03	2020	ATB Autobau AG	V	Firma 1	Dohle Hanna
	9	034	Open	🔀 Rename Por	tlet			2020	ATB Autobau AG	~		Schaub Peter
	10	036	Passive	Title Headlin	ne 2			2020	CSB Consult Be	~	Beratung	Schaub Peter
	11	037	Passive	Ok Cancel	1			2020	CSH Consult AG	1	Firma 1	Jahnke Kevin
	12	038	Passive	OK Cancer				2020	CSB Consult Be	~		Schaub Peter
	13	042	Open	Cinführung EPM	-	25:02:2020	07.01	2020	CSB Consult Be	1		Schaub Peter
	14	044	Passive	Test		06.03.2020	29.05.	2020	CSB Consult Be	-	Entwicklung	Behn Arvid, F
	15	057	Passive	PT-Projekt		09.06.2020	31.07.	2020	CSB Consult Be	1		Schaub Peter
	16	060	Passive	Einführung Fibu	Inhaltsbeschrei	08.01.2020	16.03.	2020	CSH Consult AG	-	Firma 1	Schaub Peter
m												

The headline within the portal can be up to 100 characters long.

Por	tal Tab	2									-D t
ead	line 2										
	(j) •	Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exter	Unit	Project manage
		008	ReinePlanned	Finführung Fibu		05.12.2019	10.01.2020	PBA Privatbank		Beratung	Schaub Peter
	1	000	Dengrianned	annung ribu					_	-	

A further portal is then created, ...

5	🗢 Di, 26.11.2019 KW48 🖉 002 Schaub Peter - 🕜 - 🕛 💼 📠 Tab 2	Guchen Dokumenttyp, Q
++	X 🖬 Portal Home 67	₽☆⊒
		*
	0	

... renamed (here "Tab 1") and selecting the portal type.



#### **11.3 Create Portal (Evaluation)**

For the second portal of the example we choose the option "Evaluation".



The system then lists all available standard evaluations. "Available" evaluation means that the evaluation is available and the user has rights to this evaluation.



The result of this saved evaluation is then displayed directly as a portal ...

7991582770-0						
eatedAt: 09.09.2020	0 16:43:17					
Kapazitätenaus (Alle Werte in %)	wertung II: 01.03.2020 - 31.07.2020 )	0				
Mitarbeiter	Projekt	3/2020	4/2020	5/2020	6/2020	7/2020
Dohle Hannah	045.2 Customizing aktiv	4,55	0,00	0,00	0,00	0,00
	047.2 Customizing aktiv	12,95	0,00	0,00	0,00	0,00
	059.2 umsetzung aktiv	0,00	0,00	0,00	30,00	0,00
	Abwesenheiten	0,00	0,00	21,05	0,00	0,00
	Summe	17,50	0,00	21,05	30,00	0,00
Eilers Hans	050 Demo 12 aktiv	0,00	0,00	4,86	5,21	5,21
	Abwesenheiten	25,00	0,00	0,00	0,00	0,00
	Summe	25,00	0,00	4,86	5,21	5,21

... and can still be provided with a detailed heading.

You can also change the order of the individual portals in the portal bar using drag and drop. In the example, "Tab 1" is now moved before "Tab 2".



## **11.4 Create Portals (Functionality)**

In the portal bar, you can also store functionalities such as the time tracker, the absence request, the group calendar, the information car park, the forum or the kanban boards as a portal.

To add the TimeTracker as portal to the portal bar, you only have to click on the function "as portal" in the TimeTracker ...



... and the system creates a portal with the time tracker:



Of course the TimeTracker then opens for the users of the portal with the personal TimeTracker of the logged in user. If the portal with the time tracker is moved to the first position, the time tracker opens automatically for the users of the portal after login.

Analogous to the procedure with the TimeTracker, the absence recording is also made to the portal ...

🗙 🚫 Request a	absences	
2		iii As Portal
	Reference service and	<ul> <li>03.02.2022</li> <li>Image: Image: Image:</li></ul>
Q	2021 August Sentember	2022 October November January F
16	32 33 34 35 36 37 38 33	4 40 41 42 43 44 45 46 47 48 49 50 51 52 1 2 3 4 5
	Schaub Peter (Holiday)	1
	Schaub Peter (SpareTimeCompensation)	

... und änderte die Positionen der einzelnen Portale.

💼 🔨 😥 TimeTracki 🛅 Team calei 📠 MPM I 💼 MPM II 🏾 Request at 💷 DB I 💷 DB II 🔸

The TimeTracker is now at the first position of the Portlet bar and opens automatically for the users of the portal after login:

naub P	eter	0		•	😥 TimeTra	icki 🔡	Team calei	MPM I	MPM II	Request	at 🔟 🖬 D	DB I 🔟 🖬	DB II 🕨	$\oplus$	Search	Miles	tone
×	👌 Ti	meTr	acker Scha	ub Pet	er												-口 ☆ :
	3	26	.07.2021		🕚 🕑 🛛 Ac	tions 🕶 🖡	ilter <del>-</del>										
		1														F	ilter
			From	То	Hours	Billable h	Job			Not	te						
8	)ay (	01: M	onday, 26.0	7.202	1 CW30 🛷	Ph -											
	1																7
	2																
	3																
	4																
	5																
					00:00	00:00											
8	Day (	)2: Tu	uesday, 27.	07.202	1 CW30 🛷												
	1.14	11.03															
					1											r	iller
		-	Process nu	mber	TTJob			Project		Customer	Due	time	Estimate	d time	Actual time	Time to c	ompletion
	1		022.2.2-2		Aufgabe mit T	īckets		Schnittstelle	n	Consult Softwa	ar 31.0	8.2020		24	0		
	2		047-1		Projektmanag	ement		Einführung I	EPM	Consult Softwa	ar 19.0	3.2020		20	33,5		
	3	1	047.1-1		Konzeption			Planung		Consult Softwa	ar 11.0	7.2020		224	23,5		
	4	1	045.1-2		Spezifikation			Planung		Consult AG	25.0	3.2020		38	34,5		
	5	1	049-1		AP 1			lest			12.0	6.2020		56	14,25		
	6	1	059.2-2		e2			umsetzung			17.0	7.2020		40	0		
	/	1	059.2-3		es			Tielete		Autobay AC	21.0	7.2020		16	0		
	8		05/-1		Job mit Ticket	2		Diseas I		Autobau AG	31.0	0.2020		24	8		
	9	121	0/2.1-2	_	ap z			Phase 1		Consult Softwa	ar 10.0	9.2020		40	U		-

## **11.5 Manage Templates**

When the portals are completed, you can save the constellation of portals as a template. The administration of portal templates is located in the main menu under "Settings - Portals - Manage Templates".

🗢 Tue, 03.08.2021 KW31 🖇 Sch	naub Peter - 🕐	- 🕐 🥫	🕴 4 💆 TimeTracki	🛗 Team calei	MPM I	II MPM II	🔅 Request at	DB I	💼 DB II	Search	Milestone
<b>44</b>	🗐 Start page										₽☆⊒
Customer relationship manage											
Human resources											
Project management		(			-						
Purchasing and procurement			× Manage Portal-Ten	nplate					-		
D Differ and order		Extrac							6		
Tracking		Exuas	Save as							100	
D 💽 Billing		Reques							-	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Ticket management		Create	Dentel Templete								-
Risk management			Portal-Template								
Query manager		Project pl	Controlling	load IntroTemplat	e				100		
- Filter			Financial data	load IntroTemplat	e				1000	and the second se	
Team calendar		Destructor	Management	load IntroTemplat	e						
🞇 Info market		Evaluate	Mitarbeiter (extern)	load IntroTemplat	e					1	
🐺 Forum			Mitarbaitar (intern)	load IntroTemplat						1	
Sticky Notes		Queries	Pildar Dercer (intern)	iodo incorempiac						51	
4 🎲 Settings			Neue Portal-Vorlage	load IntroTemplat	e				1000	T.	
Personal settings			Philotech-PM	load IntroTemplat	e						
4 💷 Portal			Teamleiter	load IntroTemplat	e				175		
0wn portal config			Testvorlage	load IntroTemplat	e						
Own portals			Viri	load IntroTemplat							
iii Own portlets											
III Manage templates											
Calendar Sharing						- N.	7		2		
Bulk print				-							

The name of the template (here "Project Manager") is then entered in the dialog and the template is saved with "Save".

	<u></u>	
Save as	Project Manager	
Portal-Template		
Controlling	load IntroTemplate	
Financial data	load IntroTemplate	
Management	load IntroTemplate	
Mitarbeiter (extern)	load IntroTemplate	
Mitarbeiter (intern)	load IntroTemplate	
Neue Portal-Vorlage	load IntroTemplate	
Philotech-PM	load IntroTemplate	
Teamleiter	load IntroTemplate	
Testvorlage	load IntroTemplate	
Viri	load IntroTemplate	

Users can either actively load this template or it can be assigned to one or more user groups. The active loading of a template - like saving the template - is done in the same dialog using the "Load intro template" button.

If you want to assign a portal template to a user group, you must assign the portal template to the role and, if necessary, select the option "Overwrite existing portals with template". This option forces the use of the assigned portal template.

Tue, 03.08.2021 KW31	Schaub	Pete	🖅 🕐 🕐 🔝 ។ 😥 TimeTracki	Team cale	III MP	M I 🔟 MPM II	Re	uest al 🔟 DB I 🔟 DB II 🕨	Gearch	Milestone		
4 <b>4</b> 4	×	Que	ry for Group (11 Results)	X 😵 Group	-0 5							
4 🎤 Administration		V	🖨 🏭 🌋 🧕 🞯 🛛 Filter	🔚 🉀 🏭 🚊 Document + Edit + Actions +								
4 🛅 Access rights system	1		lame 🛎									
P 🔂 ACL		1 0	1 - Administration	Id	3 08 - Projektleiter							
A Common usergroups	5	2 0	2 - Management	Name								
AllUsergroups	6	3 0	13 - PMO									
🚨 User		4 0	4 - Finanzen	Description	Zugri	iff auf "eigene" Pro	ojekte und	Anlage neuer Projekte				
Password manager		5 0	5 - Backoffice									
Authentication	5	6 0	6 - Personal	- + General	GeneralDocumentRights							
Evaluate access rights	2	7 0	7 - Organisationsleiter									
Show personal data access	9	8 0	18 - Projektleiter									
Licenses	1	9 0	9 - Mitarbeiter (intern)									
Show locked logins	5	10 1	0 - Mitarbeiter (extern)	- • Users								
LoginAs 🤄	96,	11 1	1- Kundenzugang									
Globalconfig				Sub groups								
Application				Sub groups								
🖻 🚞 System				E 97-	Name	2		Description				
Clients				IsRole								
Customizing				DescritChat								
Tools				PresetStatu	5			~				
Basic data				IntroTempla	ite							
🧼 SystemHealth				Portal-Temp	late	Project Manag	ement					
Seload server configuration				ForceIntroT	emplate	e 🖻						
🛛 🚺 Customer relationship manage				ForcePortal	Templat	te 🔽						
🖻 🛅 Human resources				- sicer or un	- più							

The action "Administration - Reload configurations" activates this change in the system. If, for example, the project manager "Meier Jana" logs on, the system opens with the four stored portals:

🗢 Tue, 03.08.2021 KW31 🖉	<u>⊰</u> Meie	r Jana	a (	D ()	-	🕵 Time	Track	Request	at 💼 Tab 1	Tab 2			Searc	h	Document type C
<b>44</b>	×	X 🔯 TimeTracker Meier Jana													中立日
Project management		2	03	.08.2021		• •	Actions	- Filter -							
Purchasing and procureme	-														
Offer and order			¥												Filter
Tracking	E			From	То	Hours	Billable h	Job			Note				
🖻 💽 Billing	a	Day 0	1: T	uesday. 0	3.08.202	1 CW31									
D icket management	m	1		icadu i, o	5.00.202	Lensi									
Risk management		2													
Query manager		2													
Her Filter		3													
Team calendar		-													
Info market			6												
🐺 Forum						00:00	00:00								
Sticky Notes 📀	)														
Settings	R	12	1168	1											Filter
Bulk print					0				Designat	Outron	Due News	Estimated time	A short blanc	Charles (AV )	Time to completion
					Proc	ess numbe	a IIJO	0	Project	Customer	Due time	Estimated time	Actual time	State [%]	Time to completion