Projectile
Version 5.9

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

Help, Part 11: Portals

Table of Contents

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):

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…

… opened.

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

The portal is now created and gets the name "Home*" from the system, where the * is a counter for all created portals.
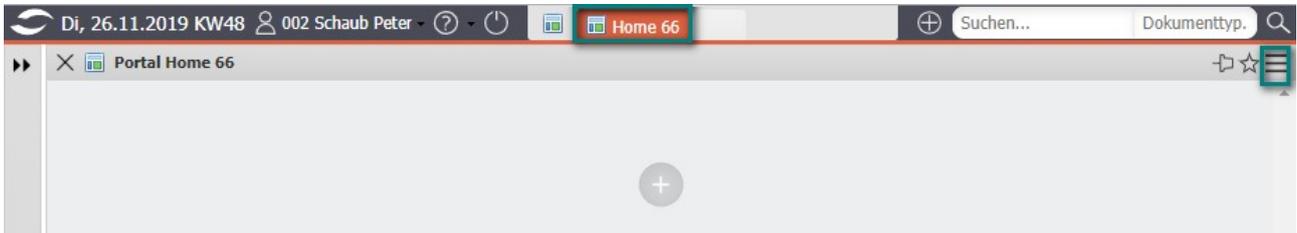
The portal is then renamed using the function "Rename portal" …

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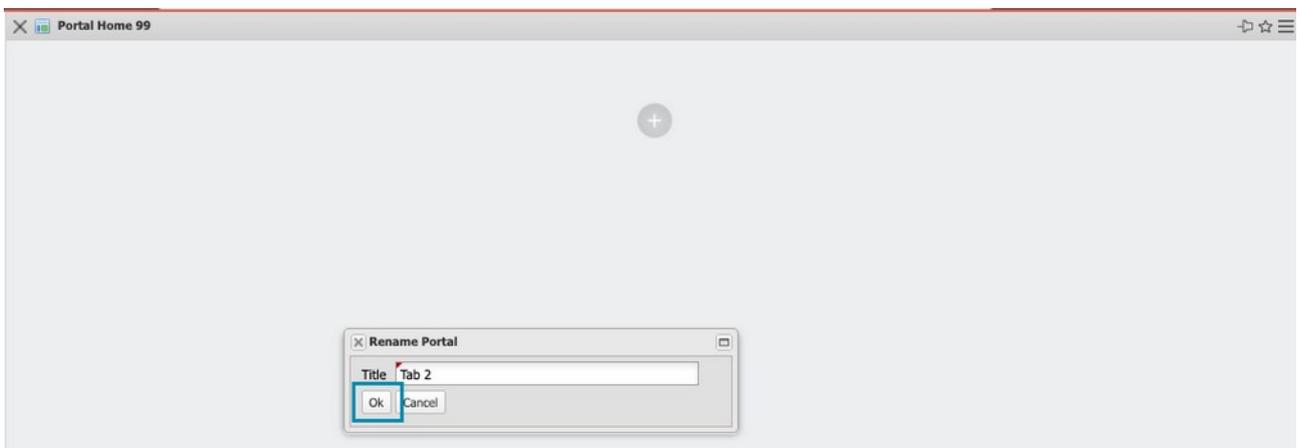
The actual setup of the portal begins with the "plus" symbol.

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 ...
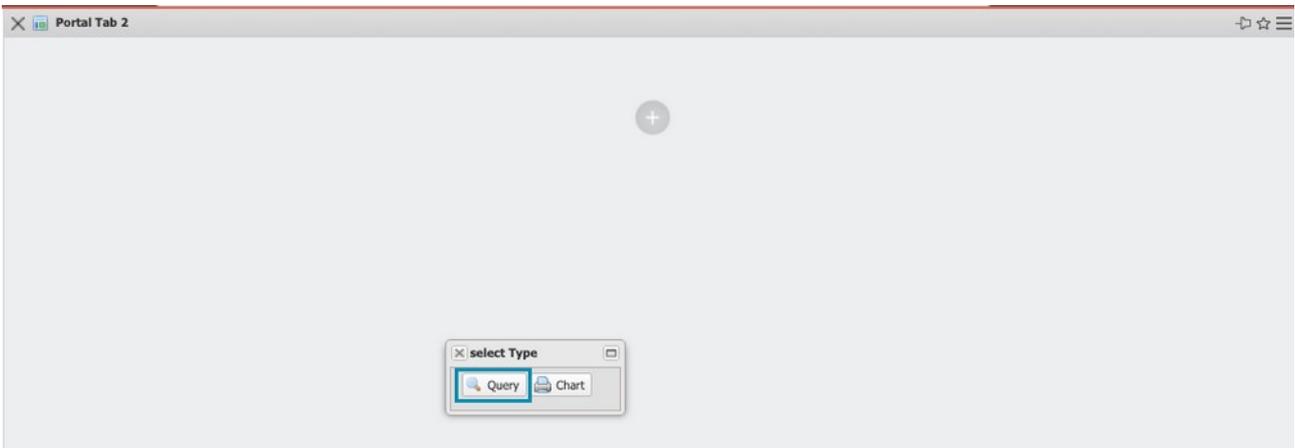
... all available queries from the Query Manager are listed and one of the queries is selected. "Available" means that the query is available and the user has rights to this query.
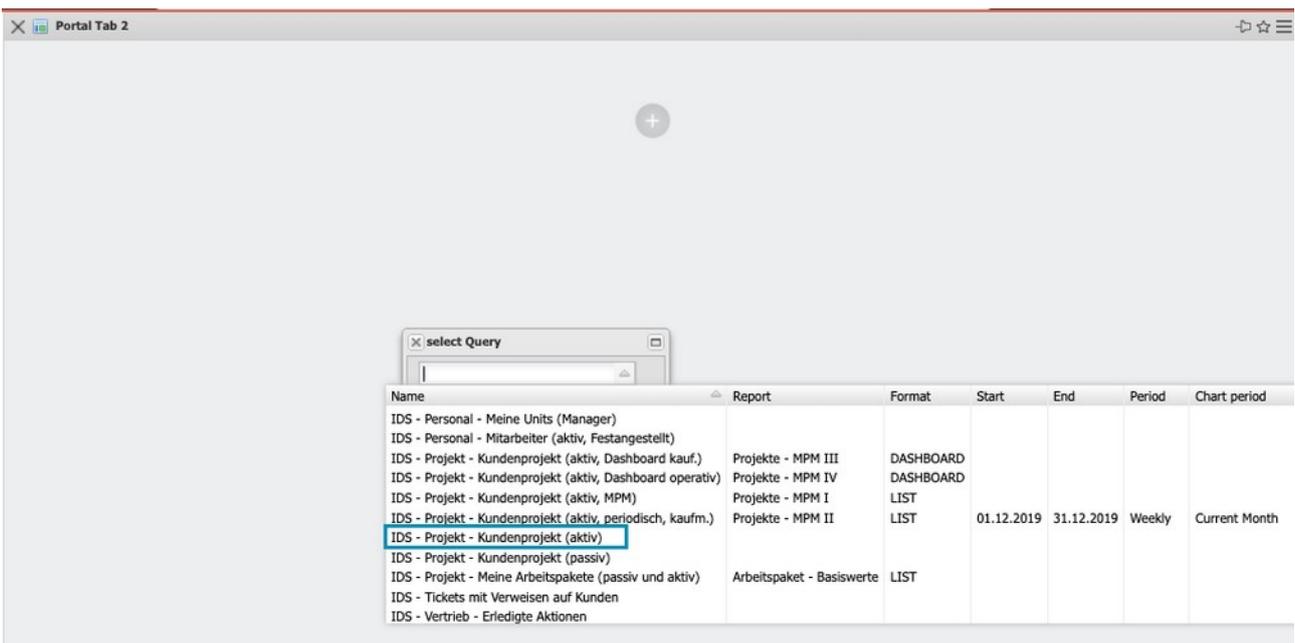
The result of this query is then displayed directly as a portal ...

1627991043526-0

		Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exte	Unit	Project managers	Planning time
	1	008	BeingPlanned	Einführung Fibu		05.12.2019	10.01.2020	PBA Privatbank ...	☑	Beratung	Schaub Peter	232:00
	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
	6	027	Passive	Neues Projekt	dsfhsfhrh	21.01.2020	30.04.2020	ATB Autobau AG	☑	Beratung	Schaub Peter	316:00
	7	029	Open	Einführung EPM		28.01.2020	27.03.2020	CSB Consult Be...	☑		Schaub Peter	232:00
	8	033	Passive	Test		30.01.2020	27.03.2020	ATB Autobau AG	☑	Firma 1	Dohle Hannah	12:00
	9	034	Open	Einführung EPM		04.02.2020	11.03.2020	ATB Autobau AG	☑		Schaub Peter	232:00
	10	036	Passive	Test 123		13.02.2020	29.05.2020	CSB Consult Be...	☑	Beratung	Schaub Peter	00:00
	11	037	Passive	sdtgr		13.02.2020	15.02.2020	CSH Consult AG	☑	Firma 1	Jahnke Kevin	
	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.

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		Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exte	Unit	Project manage
	1	008	BeingPlanned	Einführung Fibu		05.12.2019	10.01.2020	PBA Privatbank ...	☑	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...	☑		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	☑		Schaub Peter
	6	027	Passive	Neues Projekt	dsfhsfhrh	21.01.2020	30.04.2020	ATB Autobau AG	☑	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	☑	Firma 1	Dohle Hannah
	9	034	Open				2020	ATB Autobau AG	☑		Schaub Peter
	10	036	Passive				2020	CSB Consult Be...	☑	Beratung	Schaub Peter
	11	037	Passive				2020	CSH Consult AG	☑	Firma 1	Jahnke Kevin
	12	038	Passive				2020	CSB Consult Be...	☑		Schaub Peter
	13	042	Open	Einführung EPM		25.02.2020	07.01.2020	CSB Consult Be...	☑		Schaub Peter
	14	044	Passive	Test		06.03.2020	29.05.2020	CSB Consult Be...	☑	Entwicklung	Behn Arvid, Pfi...
	15	057	Passive	PT-Projekt		09.06.2020	31.07.2020	CSB Consult Be...	☑		Schaub Peter
	16	060	Passive	Einführung Fibu	Inhaltsbeschrei...	08.01.2020	16.03.2020	CSH Consult AG	☑	Firma 1	Schaub Peter, J

Rename Portlet dialog:

**Rename Portlet**

Title: Headline 2

[Ok] [Cancel]

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

Headline 2

|		Number	Status	Description	Contents descriptio	Begin planning	End planning	Customer	Exte	Unit	Project manage
	1	008	BeingPlanned	Einführung Fibu		05.12.2019	10.01.2020	PBA Privatbank ...	☑	Beratung	Schaub Peter
	2	013	Passive	Einführung EPM		05.12.2019	28.02.2020	ATB Autobau AG	☑		Schaub Peter

A further portal is then created, ...
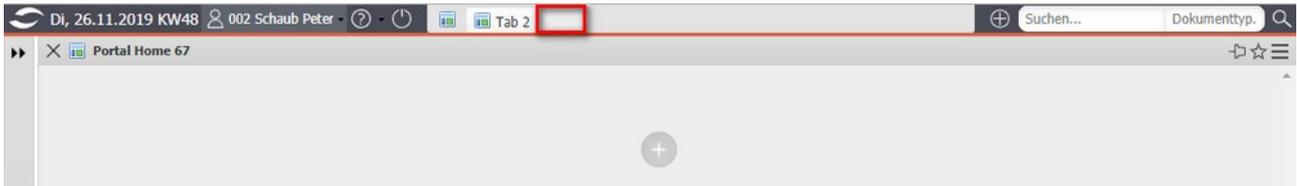
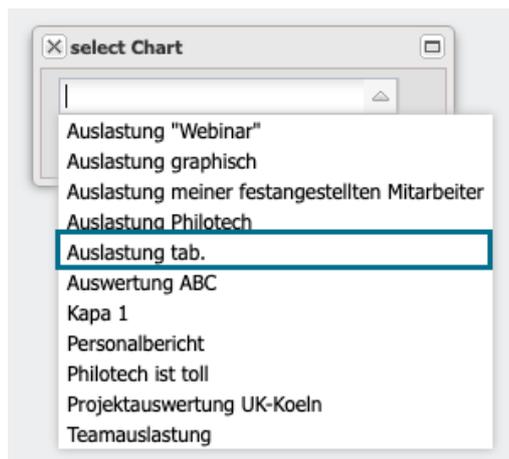... renamed (here "Tab 1") and selecting the portal type.

11.3 Create Portal (Evaluation)

For the second portal of the example we choose the option "Evaluation".
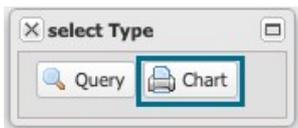
The system then lists all available standard evaluations. "Available" evaluation means that the evaluation is available and the user has rights to this evaluation.

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

1627991582770-0

CreatedAt: 09.09.2020 16:43:17

Kapazitätenauswertung II: 01.03.2020 - 31.07.2020

(Alle Werte in %)

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:
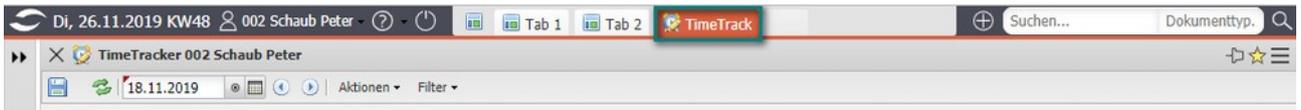
Of course the TimeTracker then opens for the users of the portal with the personal TimeTracker of the logged in user. If the portal with the time tracker is moved to the first position, the time tracker opens automatically for the users of the portal after login.
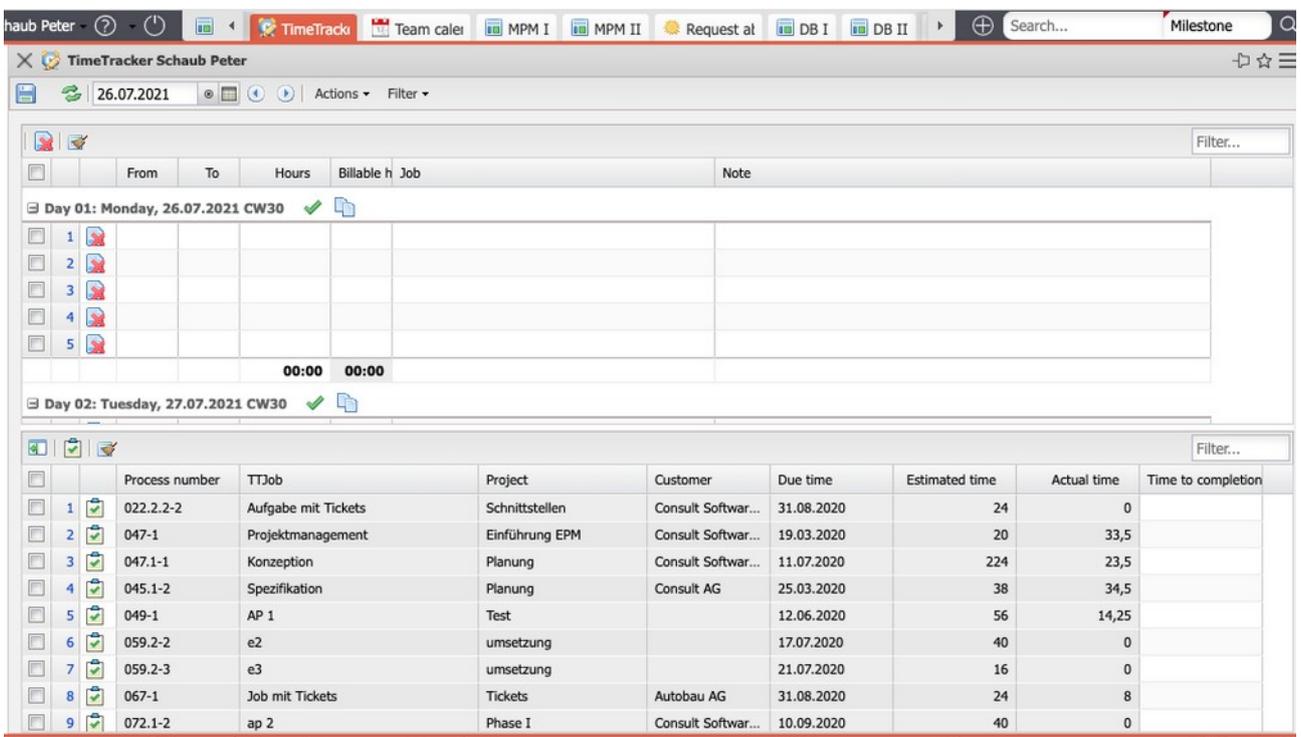
Analogous to the procedure with the TimeTracker, the absence recording is also made to the portal …
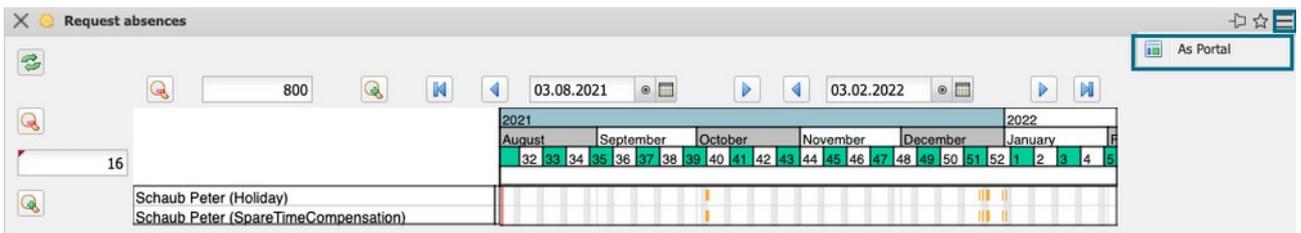
... und änderte die Positionen der einzelnen Portale.

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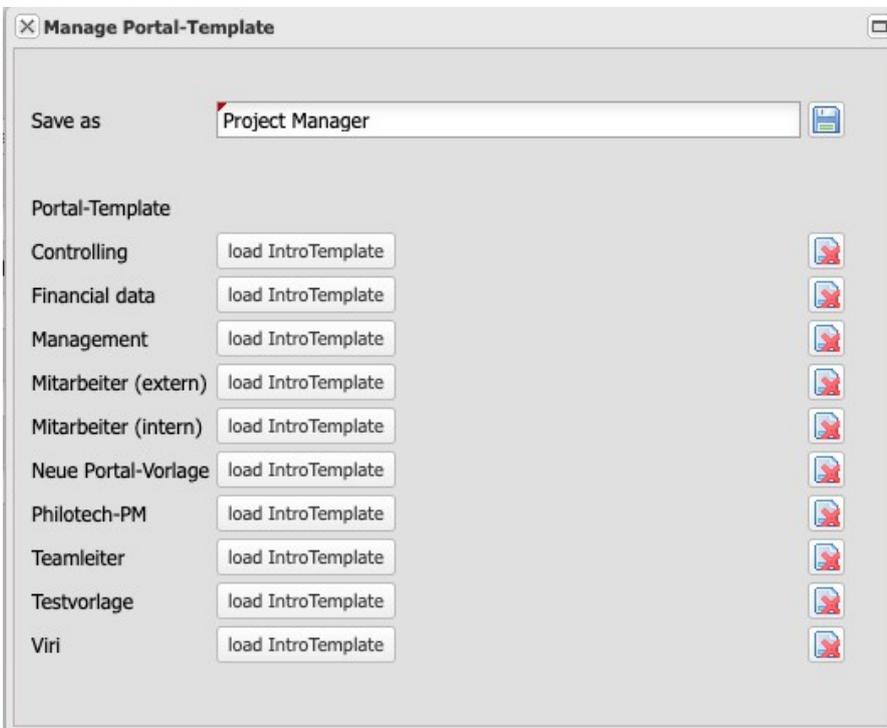
11.5 Manage Templates

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".
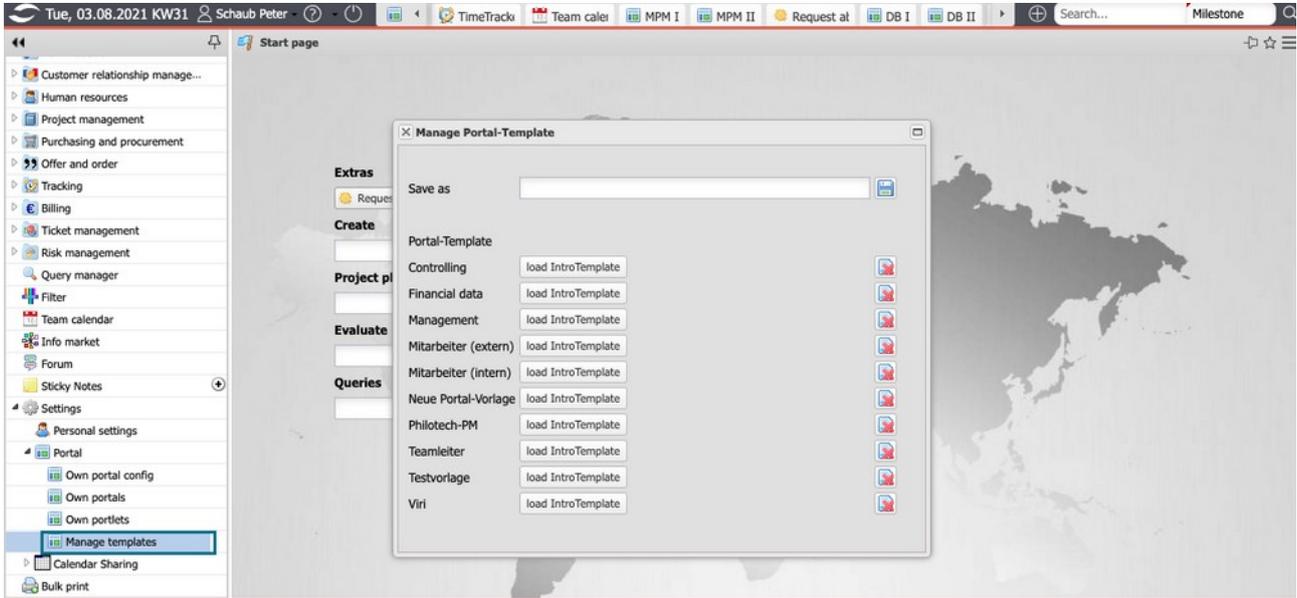

The name of the template (here "Project Manager") is then entered in the dialog and the template is saved with "Save".

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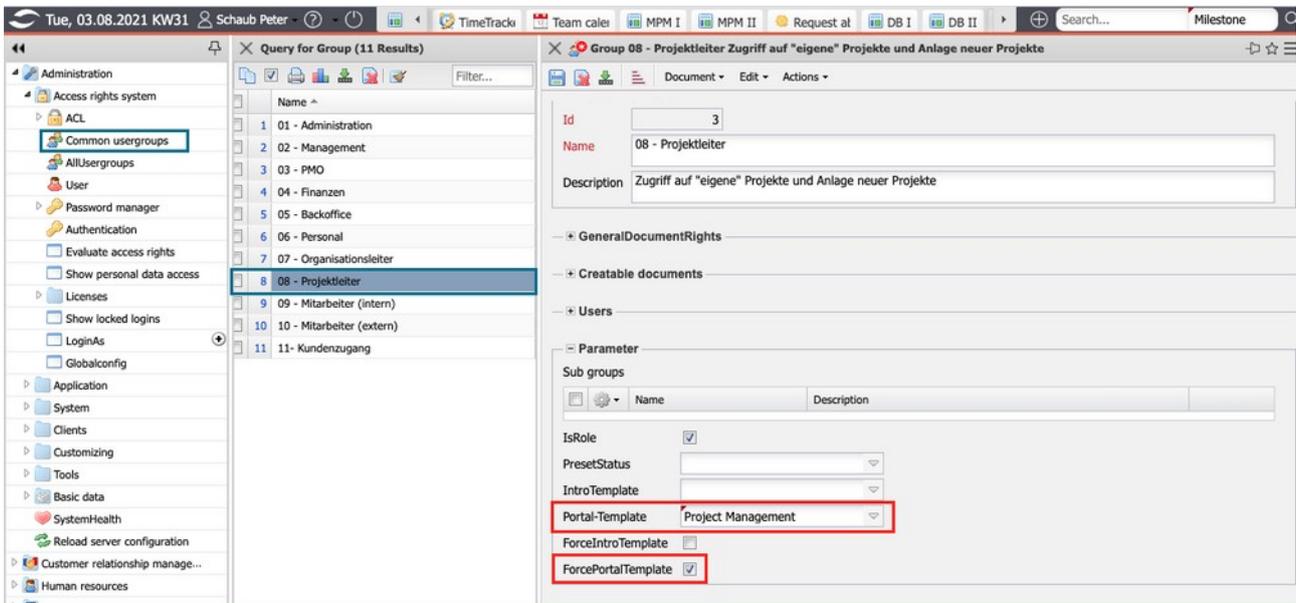
The action "Administration - Reload configurations" activates this change in the system. If, for example, the project manager "Meier Jana" logs on, the system opens with the four stored portals: