Timesheet and Document Customization

Timesheet Customization Settings

The Administration (Field Map) document contains global settings for many Project Gateway functions. It may be accessed by selecting Reports **-** "open the repository administration form". There are a number of settings associated within the section labeled Timesheet customization options. Most of these are self explanatory and are documented on the form itself. If you upgrade an existing database, you must edit and save the field map to get the default values set in the database before creating any timesheets.

Enable the creation of Timesheets

This is a master on/off switch will prevent the manual creation of timesheets. You would disable this only if you were using an Enterprise Timeportal for all users.

Task Selection Method

Autoload **-** Select this to have the timesheet tasks loaded automatically when the timesheet is created. This is the default and recommended method.

These two other options exist for backward compatibility only, do not use these setting in new databases.

Manual **-** Select this only for backward compatibility with PG 5.01 and before. If selected, the "Add My Tasks" button will appear on the timesheet form and the user must have a "My Tasks" folder prepared.

Advanced **-** This will enable both Autoload and Manual operation in each timesheet. It is unlikely that you would select this option.

Autoload - Maximum number of Initial Tasks

Select a comfortable number that will usually include all tasks a user might have scheduled for a single week. This can be extended by the user once the timesheet is open. If you don't want to limit this value, enter the maximum, 128 for Notes timesheets or 40 for web timesheets.

Autoload - Number of days for "current tasks" window.

Select a reasonable window in days for upcoming tasks that the user might expect to start early. The actual number of tasks when the timesheet is created will be limited by the previous option. This can be extended by the user once the timesheet is open. This value would normally be set to 7 - 28 days to encompass a reasonable set of upcoming tasks.

Autoload - Refresh tasklist on each reload.

Normally "Yes". This will update the task list each time the timesheet is reopened during the week. Changes in project plans may cause tasks to be added or removed (Tasks with actual work reported will never be removed). Timesheets will reopen slightly faster if this is not used.

This applies to Notes timesheets only.

Show expanded taskdetails when opened.

If set "Yes" then the newly created timesheet will display all information about each task as if the +++ button had been pressed. Since this display takes more screen real estate, it might not be desired if 640 or 800 display resolutions are in common use.

This applies to Notes timesheets only.

Include {Phase name} in extended Task information.

If set "Yes" the hierarchy of the task will be condensed and displayed under the project name when the expanded details are shown. To fit as much information as possible, multi-level phase names are truncated at each level, and the total size of this text is limited.

This applies to Notes timesheets only.

Include WBS code in extended Task Information

This shows the wbscode field of the assignment document. The WBS code is normally available for projects created with MS Project.

This applies to Notes timesheets only.

Include TaskID code in extended Task Information

If the assignment has a pg_pmTaskID field, its value will be shown. This field is present for imported projects from Primavera and Project Workbench (among others) and contains the task or activity ID value used for synchronization.

This applies to Notes timesheets only.

Confirm entry when hours for a single day on one task exceed.

Normally set to 8.00. This limit is used to prevent the unintended entry of large numbers into a timesheet cell. Entries greater than the value specified will cause a confirmation dialog to appear as data is entered. This does not prevent entry of large daily values, but forces them to be confirmed. This catches people who have typed in 125 when they intended to enter 1.25.

Limit hours reported on a timesheet when submitted

Ignore - allow any hours on a timesheet

Warn - prompt user outside of specified limits, but allow submission after confirmation.

Prevent - stop submission unless hours are within limits.

Minimum timesheet hours, Maximum timesheet hours. Enter the limits used for this function.

Set equal values to force timesheets to always have an exact total value (e.g., 40 and 40)

Condense tasklist when submitted

When set "Yes", rows without any actual work will be removed from the timesheet so as to make the actual work reported more readable to others.

Custom message in Timesheet Help

This text will appear in bold at the top of the Help dialog on the timesheet form. It can be used to direct people to the proper support channels, or to provide more instructions.

This applies to Notes timesheets only.

Special Settings for Agent Initiated Timesheets

These settings apply only to new timesheets created by the "Timesheet Agent Auto-Initiate" agent.

Task List Limit - Number of tasks to include if that many are within the Current tasks time window. Be conservative, no one wants to open a 100 task timesheet. Note that the Web timesheets are limited to 40 tasks.

Current Tasks Window - Number of days forward to look when filling timesheet. How far ahead do people typically work? Be conservative, users can add other tasks if they really are working ahead of schedule.

Overhead Settings

This is a default list of overhead categories that will be preset for each new participant added to the system. By setting this default list, you avoid the need to type it in over and over again.

Document Customization Settings

Many of the most commonly used forms of the Project Gateway system have features that can be easily customized for your needs. The Document Customization section of the Administration form allows you to adjust these features from their preset default values.

Classifications available on Issue/Risk Forms:

These choices will appear in the classification droplist on all issue and risk documents being created or edited. Enter words or phases separated by commas.

Issue/Risk Types

In the shipped configuration, an issue or risk can be marked as Open, Closed, or Deferred. These options appear in the Status droplist in the form, and are shown in the status column of the various Issue and Risk views.

The following two options allow you to provide variations on the theme for both Open and Closed status. For example, you might have several forms of "Open" such as "Open - Identified", "Open - Accepted" in order to help the team interpret the situation. You might also want to have several forms of Closed, such as "Closed - Resolved", "Closed - Rejected" etc.

While we suggest that you prefix each of your options with "Open" or "Closed" for clarity, this is not a requirement. However, you should make sure that the phrases you use will be clearly understood by the people who will be selecting and reading them to avoid much potential confusion.

Revising the status type lists

If you add additional "types" to these lists, the additional items will be available for selection on new documents and when older documents are edited.

If you remove a name, the system will, during the following night, remove that name from any document already using it and replace it with the name that is in the same list position as the previous item was.

Consider the following scenario:

You have the list configured as:

Open - New,Open - Evaluated,Open - Needs Help

And you have issue documents created with the status "Open - Evaluated" selected.

Then, you modify the list to read as follows:

Open - New,Open - Research Completed,Open - Needs Help

At the next opportunity, the system will revise all existing documents which had the status "Open - Evaluated" to show the new status "Open - Research Completed" because it occupies the same relative position (2) in the list of options and because "Open - Evaluated" is no longer an available option.

On the other hand, you could change the list to read:

Open - New,Open - Research Completed, Open - Evaluated,Open - Needs Help

In this case, any existing documents will continue to show the Open - Evaluated status, because this is still a valid choice. Internally the system would change an index in the documents so that they would should the current choice as the default when next edited.

The automatic updating of issue types is done by the Maintain Dashboards agent, which is normally scheduled to run each night.

Additional Open subtypes available on Issue/Risk Forms:

If you leave this field blank, then the "Open" option will appear on issues and risks. Otherwise, the words/phrases entered here will appear as selections in place of "Open". Enter words or phases separated by commas.

Additional Closed subtypes available on Issue/Risk Forms:

If you leave this field blank, then the "Closed" option will appear on issues and risks. Otherwise, the words/phrases entered here will appear as selections in place of "Closed". Enter words or phases separated by commas.

Priority Code shown for Issue/Risk Forms:

When an issue or risk is created you normally assign it a priority. This field allows you to "name" these priorities as you wish. The preset names are simply 1,2,3,4,5

Enter names from left to right so that the most important names appear first (e.g. High, Medium, Low)

You may have up to 5 entries.

Separate your words or phases with commas.

Status Summary types available on Status Report Forms:

When a status report is composed, the user is expected to assign one of these "summary" codes in addition to writing a description of the situation.

Only codes that appear in this entry will be selectable in new Project or Participant Status reports. The codes are displayed in the status report views as well as on the form.

Special Billing Codes available on Charge Slip Forms:

When a Charge Slip is created, the user has the opportunity to assign a code to classify the expense. This is the list of allowable codes.

Category Codes available on Scope Change Forms

Scope changes must be categorized. The category codes available will be those set here. Note that these codes are also used in the policy section of project profiles in specifying escalation conditions that require additional approvers.

Priority Code available on Scope Change Forms:

These codes will appear in the scope change forms and views. They should be entered with the highest priority names first.

Classifications available on Project Document Forms:

Each project document may be classified, this entry defines the list of possible classifications.

Types of Project Documents

The system is designed to allow customers to add new project document formats. Each format is created as a Notes "Form". Each form must be named using the convention "Project Doc - type".

The built-in types are Standard, Minutes, Charter and Milestone which correspond to the Notes forms Project Doc - Standard", "Project Doc - Minutes","Project Doc- Charter","Project Doc- Milestone".

If you want to prevent your users from seeing any of these choices, remove the appropriate name from the list. (Note that if you remove all names, then no one will be able to create project documents.)

If you want to have new document types, first add the new form to the database, making sure it is named "Project Doc - newname" and then add "newname" to this list.

See the section "Creating new Project Document types" later in this chapter for technical information.

Project Lifecycle Stages:

On the Project Profile form, the project manager can select one of these names as the "Lifecycle" code of the project. This can be constant for the life of the project, or changed as it evolves.

This item allows you to define a list of possible stage codes. Our prebuilt list is as follows: Concept Development, Design, Implementation, Deployment, Maintenance, Retirement.

Who can create News?

The Repository Center navigator panel provides an icon to allow the user to create a new "News" item for display in the News view (which also appears on web calendar format todo reports).

Using this control, you can limit the creation of News to those people who have the "PGADMIN" role, or allow any user of the system to post news. Note that a News item always contains the author's name.

Creating Custom Project Documents

This requires a person to have "Designer" rights in the database, and familiarity with Notes form design and development.

To create a new project document form:

1. Create a new Form Design element.

2. At the top of this form, insert the subform "pDocTag"

3. At the bottom of this form, insert the subform "pgxProjectDocuments"

4. In between the subforms, include whatever fields you world like to have for the user to fill out. See "Project Doc - Standard" for a basic example of a rich text body field with web file attachment support. You can copy these elements if you wish.

5. Save the new form with the name "Project Doc - yourtype"

Make sure you spell the first part of the name exactly as "Project Doc - " since this text is used by the system as a recognition code.

Test the form using the Create menu commands.

To deploy the new document format:

When the form is ready for general use, goto the Reports Navigator, click on "open the repository administration form", edit the document, and add "yourtype" to the list "Types of Project Documents". Items in this list must be separated by commas.

6. Close and save the Administration form.

That completes the development process.

At this point, any user can click "create a project document" on the Project Documents navigator, or the "Document" action on various forms. The name "yourtype" will appear in the list of possible formats and, when selected, will compose a project document based upon your new form.