

Installing and Configuring the Enterprise TimePortal

Overview

The Enterprise TimePortal software provides timesheet services that span multiple Project Gateway Repositories. It is a separately licensed, optional component of the Project Gateway system.

Pre-Installation Planning

All of the repositories that you connect with must be either hosted or replicated on to the server hosting the Enterprise TimePortal.

If replication is used, it should be sufficiently frequent so that all the assignments a participant might be expected to report on will be in the replica at the time the participant creates the weekly timesheet. Note that the assignment documents are never modified by the ETP, so there is no likelihood of creating replication conflicts. The output of the ETP is approved timesheets that are put into the repository for posting by the repository PGPostem scheduled agent.

Installation

1. Make a copy of the ETP design on to the hosting server.
2. Using the Notes menu, create a "TSPortalAdminForm" and fill in all settings and save.
3. Sign the database with an ID which has the right to run unrestricted agents on that server.
4. Put this ID into the access control list of the database with the access level of manager and the roles of PGADMIN and PGMMASTER
5. Activate the scheduled agents to run on this server as follows:
Maintain Participants, Daily
Process Timesheets, Daily
Missing Timesheets, Weekly on Sunday
Missing Timesheets - Reminder, Weekly on Friday.
PGDocumentPurgeAgent, Weekly
6. Put this signing ID (if necessary) into the access control list of every repository you attach with the access level of editor or better and the role of PGMMASTER.
7. Put all of the people who will be creating timesheets into the access control list with the access level of author and the option to create documents.
8. For each repository, you must create one repository registration form in the ETP.

Configuring the Repositories

1. Disable repository timesheet notifications.
You should disable the Missing Timesheet and Missing Timesheet - Reminders agents in the individual repositories.
2. Disable creation of timesheets in the repositories.
If all participants will be serviced by the ETP, then set the "Enable Timesheets" option in the Repository Administration (Field Map) form to "No".
If only some of the participants are going to be ETP users, then set the "Timesheet initiation" setting on the individual participant profiles to "Via Portal".
3. Verify that the PGPostem agent is running daily or more often.
Verify that the ID used to sign agents in the ETP also has the rights to be an editor in the repository and has the repository role of PGMMASTER.

Security and Visibility of Timesheet Data

The system operates with reader access on all timesheets. This means that you will not be able to see the timesheet unless you have the right to modify it. Only timesheet creators and approvers and system administrators will be able to see a particular timesheet.

Keep in mind, however, that anyone who is an editor or above can see everything. Therefore you should pay special attention to the proper use of the database access control list.

How the Enterprise TimePortal Operates

The Maintain Participants agent scans each registered repository and creates Participant registration records in the ETP database according to the settings provided on the repository registration forms. There is only one participant registration record for a given participant name, but that one record can record links to any number of separate repositories. It is also possible to create participant registrations manually, or to make manual adjustments to the automatically created records.

Once a participant has been registered, they create a timesheet by clicking on the main navigator item. If they have an existing timesheet it will be reopened, otherwise a new timesheet is created. If the same UserID is used on more than one participant registration from as the UserID for Participant, then the system will always offer a choice of participants when creating or retrieving timesheets.

At the time that the timesheet is created or refreshed, a composite task list is constructed from all of the repositories that define this participant. This list is formed by collecting up to 256 "current" tasks from each repository and creating a time sorted merged list. The top candidates from this list are presented to the user (web operation) or preloaded (note's operation) in the new timesheet.

The user fills in the timesheet and submits it. This process can span several sessions (daily reporting, weekly submittal)

If approval is required, the approver is notified by the ETP database and the timesheet sits in the waiting for approval state until it is approved or rejected.

Once approval is granted, the Process Timesheet agent will take the timesheet and create a new, subset, timesheet for each repository for which work has been reported. At this point the timesheet is marked as "processed."

The Process Timesheet agent checks the status of processed timesheets each time it runs. When all of the derived timesheets have been posted in their repositories, the status of the ETP timesheet is changed to posted. This completes the timesheet cycle and allows another timesheet to be created for that participant.