

Project Gateway[®] 5.12 Release Notes

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V5.12 is an update to the V5.11 release. This release contains a number of corrections to the 5.11 release and several new features.

V5.12 contains changes which support specific features of Project Observatory[™] V3. If you are deploying or upgrading to V3, please update your repositories to V5.12. The Observatory features affected are Custom Overhead Projects, the TaskList action, Holiday Synchronization, Earned Value reporting, the Search/Assign Workflow, the Observatory Management Assistant, and Briefings.

All project managers should upgrade to the newest versions of the Project Gateway tools. These tools are backward compatible with all Project Gateway Repository designs so you may update them without necessarily updating the database designs.

System administrators should carefully review the information provided below to determine if they should update existing databases with all or some of the design changes provided.

REGISTRATION

If you are a new Project Gateway user, please fax in your registration form so that we can contact you or send updates when appropriate. We are located at the following address

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Please note that our office address will be changing during the summer of 2003 as we move to the Reno, Nevada area. Please check our web site for our current address and phone numbers.

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The Project Gateway 5.1 System Administration Project Manager User Manuals and Repository Users Manuals, in conjunction with these release notes, provide instructions for the use of this software. If you do not have the printed

version, you will find an electronic version in the DOC section of the CD and on the support section of our web site.

RELEASE FILE NAME CHANGES

The file names for the database designs have changed slightly from 5.10.

Pg512rep.nsf	Repository Center
Pg512arc.nsf	Archive Center
Pg512wrk.nsf	Request Center
Pg512met.nsf	Metrics Center
Pg512cos.nsf	Costing Center

IMPORTANT UPGRADE NOTE

If you upgrade your database design to 5.12, please remember to open, edit and save the Administration (Field Map) document after the design replace.

This document has 5 parts:

- Part I: New Features in 5.12
- Part II: Corrections in 5.12
- Part III: New Features in 5.11
- Part IV: Corrections in 5.11
- Part V: Project Gateway Tools (V511 and V512)

Part I: New Features in Project Gateway Version 5.12

New Earned Value Support
Preset Dates on Web Timesheet
Extended Notification for Issues, Risks, & Scope Changes
Pre loading of Participant Status Report
New Timesheet Overhead Reporting for Observatory
Change to the New Assignment Form
Changes in Issue and Risk Forms
Support for the Observatory "TaskList" Action
Domino 390 Support

New Earned Value Support

This was a series of changes to provide full earned value calculation, views, reporting, and observatory reporting.

The Earned Value technique (sometimes called C/SCSC - Cost/Schedule Control Systems Criteria) is a way of assessing the performance of a project that is partially completed by comparing the results obtained to date with those to be expected if the work had been done exactly as planned.

There are three visible signs of this new functionality in Project Gateway.

1. There is a new view on the "Reports" Navigator called "Performance by earned value"
2. There is a new report listed in the project profile reports section called the "Earned Value Details Report"
3. There is a new statistic shown in the project profile labeled "Ref. Due"

Keep in mind that the Earned Value method is based upon the assumption that you have begun with a well thought out, carefully estimated plan. If your project goals are poorly defined or a moving target, then these techniques will not help very much.

The Earned Value Details Report

This report lists all assignments in the project which have "reference" values.

For each assignment the following columns are produced

Ref Start, Ref Finish, Task, Resource, BAC, EAC, BCWS, BCWP, ACWP, %Complete, SV, CV

The Performance by Earned Value View (Reports Navigator)

For each project, this provides the following:

Program, Project, BAC, EAC, BCWS, BCWP, ACWP, %Complete, SV, CV, SPI(E), CPI(E), and Manager Name.

Understanding the language of Earned Value:

These acronyms, BAC, EAC, BCWS etc. evolved in the 60's for government contract reporting. They are widely used in construction and defense project management.

Ref Start and Ref Finish are the date when the assignment was originally expected to be

done.

BAC is the "Budget at Completion" which is the original work hours planned for the assignment. This is also called Ref. Work in Project Gateway. The project level value is the sum of the assignment values.

EAC is the "Estimate at Completion" which is the sum of the actual hours reported to date and the work remaining. This is called "Total Work" at the Project Gateway project level. The project level value is the sum of the assignment values.

BCWS (Budget Cost of Work Scheduled) is the number of hours that would have been used to date if the original plan had been followed. This will be a value from 0 (if the assignment was not yet supposed to be started) to the BAC if the assignment was supposed to be finished by now. This value depends only on the Ref Start, Ref Finish and BAC. It is not affected by the actual work done. The project level value is the sum of the assignment values.

BCWP (Budget Cost of Work Performed), which is usually called "Earned Value", is the number of hours of the planned work that should have been expended to get the degree of completion that has been reported.

If you have an assignment that is done, then all of the planned work is considered to have been "earned". So the earned value of that assignment is the BAC.

If you have an assignment that is not actually started, then none of the planned work has been done and the earned value is 0.

If you have an assignment which is 60% complete, then 60% of the BAC has been earned.

Note that the BCWP is the same if you spent 1 actual hour getting 60% done or spent 1000 actual hours doing it.

The project level value of BCWP is the sum of the computed assignment values.

ACWP (Actual Cost of Work Performed) is simply the number of actual hours spent on the assignment so far. The project level value is the sum of the assignment values.

%Complete is simply the value entered on the assignment. To be used properly, this should be entered as the "percent of objective realized". However, most of the time in IT work this is simply the ratio of ACWP to EAC. So long as assignments are of short duration, the difference in these methods of reporting is generally not important to the project totals. To do Earned value properly, however, the project manager should really look at each "in progress" assignment each week and revise the %complete where necessary to reflect the real progress toward the objective, not simply the hours spent as reported by the timesheet.

SV (Schedule Variance) is the difference BCWP-BCWS. If you have accomplished the work sooner than the plan shows, you have a positive variance (no matter how much effort it took to do it). If you accomplish it more slowly, you have a negative schedule variance, even if you are very efficient and way below budget.

CV (Cost Variance) is the difference BCWP-ACWP. If you have spent fewer hours than planned getting the tasks done, you have a positive variance (even if you are late.) If you have actually spent more hours than planned for the work that is done, you have a negative variance.

Given the choice, you want to have both variances in the plus column!

SV% is simply $SV/BCWP$.
CV% is $CV/BCWP$.

These percentage values allow projects of different sizes to be compared. If you have + or - 10% variances you are doing reasonably well.

SPI(E) is the ratio of $BCWP/BCWS$. This will be near 1 so long as you are executing on the original timeline. It gets larger as you work ahead of schedule, and gets smaller as you fall behind. Once the project is finished (both in fact as in plan), this ratio becomes 1.

CPI(E) is the ratio of $BCWP/ACWP$. In other words, it is the ratio between how many hours you planned and how many hours you actually used, to get to the current level of accomplishment. You would like this to be 1 or greater because that would mean that you were more efficient than you planned. If this is less than 1, then you are using more manhours than expected to get to the current point. When the project is done, this is simply the ratio of planned/actual (BAC/EAC). CPI(E) is generally a good predictor of budget overruns once you have actually completed 30% or so of the project work.

Note: You can see the historical trends in all these numbers using the Project Observatory Earned Value reports.

Project Profile Earned Value Statistics

The Project Profile now shows a the value "Due Hours"
This is the BCWS value described above.

Other statistics are:
Actual Hours. - ACWP
Reference Hours. - BAC
Total Hours. - EAC
Earned Hours. - BCWP

Implementation Details:

To create the Earned Value Details report we have added the (WebEarnedValueDetails) agent.

To maintain the new "Due Hours" statistic (stored as "pgstat_asgRefDue") we have modified the Maintain Dashboards agent.

Due Hours are calculated for each assignment as the prorated share of the reference work of each assignment that should have been finished by the effective date, which is the end of the prior week. The proration calculation excludes weekends. The total of the assignment values is recorded in the Project Profile.

To transfer this information to Project Observatory, the XML Repository Link agent was changed to add the "pgstat_asgRefDue" item to the collection of transmitted project statistics.

The pgstat_projectprofile subform was changed to add the item "Due:" in the second column under "Earned:". This will display the value of pgstat_asgRefDue (BCWS) as last calculated by Maintain Dashboards.

This pgx_projectreports subform was changed to add "Earned Value Detail Report" to both the Web and Notes actions list.

The Project\5. Earned Value view was added to the design (replacing the Project\5. Updated Assignments view) This view was created to show the earned value data for each project as

currently recorded in the project profile by Maintain Dashboards. The columns shown include BAC, EAC, BCWS, BCWP, ACWP, SV, CV, SV% and CV%

The (PGRPTNav) navigator was changed to add the "by earned value" item in the top section and remove the "updated assignments" item in the last section.

Preset Dates on Web Timesheet

The Web Timesheet was changed to default to show the oldest possible timesheet that may be created.

Extended Notification for Issues, Risks, & Scope Changes

The Issue/Risk and Scope Change forms were changed to send the project manager notification to the first 10 project manager email addresses listed in the project profile Send Message To field.

Another change was made so that this notification would be sent even if no participant was assigned to the issue, risk, or scope change.

In previous versions, the PM notification would be sent only to the first PM address and only if a participant was assigned.

Pre-loading of Participant Status Report

The web operation of this same form was changed so that, if the document is created by using the links found on either the participant profile or timesheet, then the contents of the "Report", "Activities", and "Problems" fields will be pre loaded from the last such report by that person. The previous "Plan for next week" becomes the "Current "Activities."

The Participant Status Report was changed to show "[Select]" when the form is opened so that the user must select a participant if one was not preselected by the choice of open action links.

Change to the New Assignment Form

The New Assignment form was changed to add another automatic web link to open the project profile document.

Changes in Issue and Risk Forms

Changed so that the "project name" defaults to [Select]. The user must then select a project or [All] to save the document. This prevents the inadvertent selection of "All" for new issues.

NewTimesheet Overhead Reporting for Observatory

The Administration (Field Map) form was changed to add two new fields to control export of overhead reports to Observatory 3.

The new Administration options appear in the Repository Suite section alongside the caption "Timesheet Overhead reporting"

The settings are "Update observatory overhead projects" and "Report timesheet overhead hours"

The choices for "Update observatory overhead projects" are:
Never, Everyday, and Weekly on Sunday, Weekly on Monday, etc.

The choices for "Report timesheet overhead hours" are:
All, Past 2, Past 4, Past 13, Past 26.

This works in conjunction with Custom Overhead Projects feature in Project Observatory V3. Until you have created one or more Custom Overhead Projects, you should set the first option to "Never".

After you have defined your overhead projects, set the first option to either everyday or to Weekly for the day after which you expect your timesheets for the previous week to have been posted. This is usually Sunday, Monday or Tuesday depending upon what approvals you use. Since timesheets change only once per week, you reduce the processing time by sending updated data just once per week.

If there are many months of timesheet already stored in the repository, set second option to "All". After about a month of operation, change this to "Past 4 weeks"

If you are using a new Repository and an new Observatory, then set the second option to "Past 4 weeks".

The choice of the best setting for the second option depends upon how corrections are made to timesheets. If you never correct any timesheets after the first week, then you can minimize computation by selecting "Past 2 weeks". If however, prior timesheets are frequently corrected many weeks after they are originally posted, then you should choose a setting that will encompass the earliest correction you expect to see.

The Repository Link agent uses these settings to export the overhead hours from timesheets to Observatory as a series of "Overhead Project Reports". The reports will contain all the overhead hours reported for a particular overhead category going as far back in time as specified by the second parameter.

The Observatory receives these reports. It uses the overhead category name to select a Observatory Overhead Project using the rules specified in the Custom Overhead Project Report Definition forms. More than onerepository overhead category can be mapped into a single Observatory Overhead project. And overhead reports from several repositories for a single category can be mapped into an Observatory Overhead project.

Unlike regular project reporting, overhead reporting is incremental. This means that the system does not need to send every timesheet hour from the beginning of time, but only those which are new or which may have changes since they were previously reported.

If you decide to change the structure of you custom overhead projects, then you should also change the "Report timesheet overhead hours" settings back to "All" so that the entire data set is retransmitted to Observatory. By doing this, the new Observatory Overhead projects will be completely regenerated.

Support for the Observatory "TaskList" Action

The Briefing Assistant agent was changed to support the new TaskList action found in Project Observatory 3. This allows the user to click an action button on an Observatory project commitment document and receive a table listing all of the tasks making up that commitment.

Extended Observatory Support

The XML Project Observatory Link agent was extended to add the following features
Support operation on a Domino 390 IBM server.

Support for timesheet overhead reporting.

Support for earned value information.

Domino 390 Support

The XML Repository Link Agent and the Graphics PGGF Background Agent were changed to support binary mode file generation to allow correct operation on Domino 390 on an IBM Mainframe. This was necessary because of the EBCDIC character set conversions done by Domino 390 which made the XML and PDF export files unreadable on a PC.

Part II: Corrections in Project Gateway V5.12

TimeSheetWeb Form
Scope Change Form
A New Assignment Form
Assignment Form
Issue Form
Issue Response Form
Participant Profile form
Project Profile Form
Program Profile Form
RepositoryCenter and RepositoryCenterWeb Navigators
Deliverables\4. by Project View
(KeyEvents) view.
Projects\5. Updated Assignments
(HiddenTimesheetsApproved) View
Issues and Risks Views
pgMtrProfileFM Subform
pgx_OrganizationUserID, pgx_ProgramUserID Subforms
WebMyIssues.csv Agent
PGMetrics1 and PGMetrics2 Agents
MaintainAccessControl Agent
AskPGQuery Agent
WebCreateAssignmentAgent
WebExportTSFile.csv Agent
pgRenameSupport Script Library
pgJournalSupport Script Library
pgTimesheetSupport Script Library

METRICS CENTER CHANGES
ParameterList form and (pgMtrItemPrmDefAlpha) View.

REQUEST CENTER CHANGES
Work Request Processing Agent

ARCHIVE CENTER CHANGES
Archive Admin Profile form

REPOSITORY CHANGES

FORM CHANGES

TimeSheetWeb Form
Corrects problem wherein the user entered work remaining would be reset by a subsequent change to actual work on that timesheet row.

Corrects problem wherein some assignments might have invalid hyperlinks after tasks were added to the timesheet.

Scope Change Form
Corrects a problem wherein the age displayed for an approved scope change would be displayed in seconds rather than days.

A New Assignment Form
Corrected so that the optional notification of a new participant will work when the participant's email address is in internet format.

Assignment Form

Corrects a typographical error in the warning message displayed when the owning project is in a proposed status.

Changes the validation criteria for the actual finish and scheduled finish fields to prevent the user from being able to entering a date without a time that is earlier than the start time for that assignment. Essentially you could get a task which started in the morning but finished the previous midnight due to some peculiarities in how Notes compares dates.

Issue Form

Changed so that the "Topic/RiskSummary" prompt would always track the document type when changing from issue to risk to issue.

Issue Response Form

Changed so that the navigator links would be correctly selected in all cases.

Participant Profile form

Changes the validation formula on the SendTo field. The V5.11 release version would always reassert the userid if the SendTo was blank.

Project Profile Form

Changes the value formula for pg_SIDChangeDate so that a date value is always created.

Program Profile Form

Changed to prevent an error message when large numbers of project (>200) were assigned to a program and the program profile was displayed using a browser. The total text size of the displayed field was exceeding the notes limits. Now it displays only the first 100 projects and adds a notation to the bottom of the list as to how many other projects exist but are not displayed.

NAVIGATOR CHANGES

RepositoryCenter and RepositoryCenterWeb Navigators

Changed to correct a problem with the ? icon which was not linked to the correct online guide view.

VIEW CHANGES

Deliverables\4. by Project View

Corrects a problem wherein the view would not show categories for projects whose names were 2 characters or less in length.

(KeyEvents) view.

Corrects a problem that prevents selecting events in deliverables using a Notes client when the event task name contains a comma.

Projects\5. Updated Assignments

This view was removed from the design as it no longer served a useful purpose.

(HiddenTimesheetsApproved) View

Changed view selection so that, if a web timesheet was approved by a Notes client, it would appear in the view.

Issues and Risks Views

Changed all 12 of these views to modify the selection criteria so that all of the response documents would be shown, even if the document type was changed from Issue to Risk and even if both kinds of responses had been accumulated over the lifetime of the document.

SUBFORM CHANGES

pgMtrProfileFM

Changed this subform to add new overhead parameters for the Observatory Link function.

pgx_OrganizationUserID, pgx_ProgramUserID

Changes the value formula for pg_SIDChangeDate so that a date value is always created.

AGENT CHANGES

WebMyIssues.csv Agent

Corrects a problem wherein the "Created" column on a scope change report would show the wrong date if the scope change was approved.

Repository agents PGMetrics1 and PGMetrics2

Corrects a potential problem where the userID list generated by PgMetrics1 when multiple forms were generated could be so long as to cause failure in PGMetrics2.

MaintainAccessControl

Changed to prevent the removal of [PGADMIN] from the edit access list of documents using reader teams.

AskPGQuery agent

This agent was changed so that the Current Assignments and Overdue Assignments reports, which currently are limited to no more than 50 assignments listed, is expanded to a maximum of 500 assignments listed.

Changed so that resource assignment list selection is case blind.

WebCreateAssignmentAgent

Corrected so that the optional notification of a new participant will work when the participant's email address is in internet format.

WebExportTSFile.csv Agent

Changed so that, if the project profile is missing, the timesheet data can still be exported using the duplicate information found on the assignment document.

SCRIPT LIBRARY CHANGES

pgRenameSupport

Made change to process of updating participants and projects so that "defaults" would be properly set for editing after an organization or program name change.

pgJournalSupport

This was corrected to fix a problem which prevented the participant of an assignment from being notified when using the Notes action on an assignment document.

pgTimesheetSupport Script Library

Changed to ignore case differences in resource names when populating web timesheets.

METRICS CENTER CHANGES

ParameterList form and (pgMtrItemPrmDefAlpha) View.

Corrects a problem which prevented newly created parameters from being selected into previously created lists.

Changes the display of parameters for selection to be alphabetical.

REQUEST CENTER CHANGES

Work Request Processing Agent

Corrects an error which prevented the selected manager from being included in the editors list of a new project profile.

ARCHIVE CENTER CHANGES

Archive Admin Profile form

This corrects a problem which caused the "Return to Archive Center" link on the response page to be incorrect.

PART III: New Features in Project Gateway V5.11

Contents

REPORTING FEATURES

- The "What's New" Report**
- Daily Workload Reporting**
- iCalendar Subscription support**
- New Notes Calendar Export functions**
- New RSS Newsreader Support**
- Enhanced "Status Report" Reports**
- Enhanced "Discussion" Reports**
- Enhanced "Scope Change" reports**
- Enhanced "Risks" reports**
- Enhanced Gantt Charts with the Auto Align feature**
- New Participant & Holiday Export to Microsoft Project**
- Enhanced Export Timesheet Data function**

DOCUMENT CHANGES

- New Document Change Log Mechanism**
- Enhanced Note and Journal Features**
- Program Profiles**
- Organization Profiles**
- Participant Profiles**
- Team Profile Changes**
- Project Profiles**
- Project Status Report Form**
- Issue/Risk/Scope Forms**
- Assignment Form**
- A New Assignment Form**
- Deliverables Form**

ADMINISTRATIVE CHANGES

- New Admin\Delete Workplan Now agent**
- Document Tracking Agent**

SUITE COMPONENT CHANGES

- Work Request System Changes**
- Costing Center System Changes**
- Repository Archive Changes**
- Metrics Center Changes**

REPORTING FEATURES

The "What's New" Report

This generates a report page showing documents that were recently added to the repository that contain the name of the current user (as author, assignee, reader, editor, manager, etc.)

This report is created by a new link on the web repository home page labeled "[What's New](#)".

This one-click report provides "content awareness" for an individual working in a team environment.

Selected documents are grouped in rows by type (ISSUES, PROJECTS, etc.) and ordered by creation date.

The documents are color coded so that you may recognize those created since your last use of this function and those created within the past 7 days.

Each document is represented as a small box with the title. The creation date and assignee are also shown. Overdue items are highlighted. The title is hyperlinked to the open the real document in a new browser window

A caching method is used to optimize performance. As shipped, the cache will be reconstructed if more than one hour old. It can also be reconstructed using a link labeled "Check for Newer Documents" that is displayed at the bottom of the report.

Daily Workload Reporting

The "Ask Project Gateway" Query facility, which is used directly from the Query action on the Repository Web Homepage and indirectly by a variety of profile based report links, now supports both Daily and Weekly workload reporting. When the Daily option is selected, a 13 day table is generated by default, with a 30 day version offered as a optional link. The first time period shown is Yesterday. Today always appears in the second column.

Daily workload is calculated by taking the planned work and dividing by the number of available work days between the start and finish dates. Monday to Friday are considered workdays, Saturday and Sunday are not. So a task planned for 20 hours that starts on Thursday and ends on Tuesday will have 4 work days and will report as 5 hours on each workday and no hours on Saturday and Sunday. However, if the task is scheduled to start and finish on the weekend, then the time will be allocated on the weekend day(s).

Days marked using the "Schedule" function on the participant profile are highlighted on the daily work view, but are not excluded from the workload calculation.

Daily workload reports can be obtained for Participants, Projects and Organizations.

iCalendar Subscription support

The Internet Calendar protocol iCalendar was developed to allow applications to exchange calendar style information. Project Gateway now provides an agent which generates information in this format. This agent is activated by a URL which can be referenced by third party calendar applications such as the new iCal(R) application from Apple and Mozilla Calendar on Windows and Linux.

Calendars can be generated in this public format for projects, programs, organizations, participants, and teams with all the options normally provided for Custom Todo Reports except those specific to the display of completed items.

A new option, **Subscribe**, appears in the Reports section of all profile documents and as an action on Team Profile Type II forms.

Clicking this action opens the **iCalendar Subscription Setup** form which lets you select the contents of your calendars.

Clicking Go opens the **iCalendar Subscription Form** and displays the URL to be copied and pasted into the Subscription URL field of your calendar application.

Note that this URL requires database access, so that the subscribing application must support http authentication in order to update its information.

For a one time export, a link is provided on the Subscription form which will download the data to a local file in .ics format. This can then be manually loaded into a compatible calendar application.

New Notes Calendar Export functions

The system will now send "todo" items from the Repository to your individual Notes calendar for assigned Issues, Risks, Scope Changes and task assignments. These will be updated or removed when the corresponding repository document is changed.

The existing participant profile option "Calendar, Palm Pilot & Workpad" notification rule has upgraded to support this additional functionality which is enabled on a per-participant basis.

New RSS Newsreader Support

Project Gateway can now generate a RSS format file (RDF Site Summary) based upon the Repository content and optional user settings. This XML document can be interpreted by RSS compatible newsreader applications such as NetNewsLite(tm) and Radio Userland(tm).

The newsfeed can consist of a personalized mix of Repository News, Recently Created Discussion topics, and recently created issues, risks and scope change documents. These can be filtered to be specific to yourself or any specific project. One person can have any number of separate subscriptions.

The RDF XML File is generated by an agent. The agent is activated by a URL that you place into your Newsreader application. The URL is created for you by an action located on the Repository News page.

From the Web Home page, Click News, then select **RSS Newsreader Subscription**. This will display the **RSS Subscription Setup** form which provides options for your personalized newsfeed.

Press Go to display the **RSS Subscription Form**. This will show the proper URL. Simply copy the text provided and paste it into your newsreader application

Note: The newsreader must be able to access the repository to get the news. This means that you either need to have a Newsreader capable of doing authentication, or you must allow "depositor" access to the database for default (Anonymous) users. Depositor access does not allow any of the database documents to be seen (all views appear empty), but does allow agents to be run.

Enhanced "Status Report" Reports

This adds additional format options to the Status Report Reports.

The user may now select Basic, Standard, or Full presentation of the reports. In the Basic mode, only one line per report is created. In the Standard mode, a second row appears under the title field showing the "body" of the report. In the Full mode, three additional rows appear showing the "Achieved", "Next Week", and "Problems" sections of the report.

The user may now control the selection of reports to be included. The options are "LATEST", 2, 4, 13, and ALL REPORTS. The LATEST option will show only the most recent report. The 2, 4, 13 will limit the results to show that many reports (if available).

Status Report Reports generated from the project or program level will show both project and participant reports coded to those projects. When generated from the participant or organization levels, all participant status reports are shown.

Enhanced "Discussion" Reports

This is a feature enhancement to add additional format options to the Discussions Reports that allows you to see the entire content of all of your selected discussion threads on a single page.

The format options "BASIC", "STANDARD", and "FULL" are now provided.

In the Basic format, only the discussion topics are shown.

In the Standard format the body of the discussion document is added as a second row under the title field.

In the Full format, the list of responses and the contents of each response are listed in a tabular format (similar to the Issues report).

Enhanced "Scope Change" reports

The "statistics" block at the top of the report is now hidden unless the filter condition is set to ALL. This prevents a misleading display since only filter selected changes were included in the counts.

A new filter condition "APPROVED" has been added to so make it easier to show only approved scope changes.

When "w/Roles"+ is displayed, the text has been altered. - If the investigator or additional approver has not been assigned, these lines are no longer printed. In previous releases, the words "[No Investigator] or [No approver] would appear. A new line has been added labeled "Impact". This will show the estimated impact of the scope change in hours, days, and cost as entered in those fields of the scope document.

The new columns "Apvd Hours", "Apvd Cost", "Apvd Days" are now available as custom columns. They are also supported for custom spreadsheet csv generation. They are not sort options.

Enhanced "Risks" reports

This change adds support for support for PROBABILITY column in table, matrix and spreadsheet output. Risk probability is set in the Risk form.

This allows creation of a "Risk Threat Report" showing groups of risks in a matrix of priority vs. probability.

Enhanced Gantt Charts with the Auto Align feature

The agent generated Gantt Charts now provide new methods for setting the date range of the charts which may make them much more useful when you want charts showing daily task details.

The "**Chart Time Range**" option, found in the ***Date Range for Chart*** section, now provides 7 choices.

Auto Scale Date Range - spans the task dates for the selected subject.

User Entered Date Range - spans a particular set of dates

Auto-Center Date Range - spans a fixed range of dates which is reset automatically so that the current day is in the center of the chart.

Auto-Week Align Date Range - spans a fixed range of dates which is reset automatically so that the first day of the current week is at the left edge of the chart.

Auto-Month Align Date Range - spans a fixed range of dates which is reset automatically so that the first day of the current month is at the left edge of the chart.

Auto-Qtr Align Date Range - spans a fixed range of dates which is reset automatically so that the first day of the current quarter year is at the left edge of the chart.

Auto-Year Align Date Range - spans a fixed range of dates which is reset automatically so that the first day of the current year is at the left edge of the chart.

All of the Auto Align modes use the user entered dates to define the chart duration, but the start and end date will be adjusted when the chart is created depending upon the mode selected.

Example

1. To create a chart which always shows the current two weeks, you would set the option to Auto Align Week, then enter a start and finish date two weeks apart. e.g. 8/1/2002 and 8/15/2002. (Note: The result will be the same if you entered 1/1/2000 to 1/15/2000, only the difference matters)
2. Set the Timescale option to Weeks and Days so that individual days will be identified in the chart heading.

Note: For periods longer than 2 weeks, use a larger virtual paper size if you want to show the day scale. A C sized chart will show a full month by day very nicely.

New Participant & Holiday Export to Microsoft Project

Now you can take the holidays entered by your participants using the Schedule action and load them directly into Microsoft Project. This allows you to easily adjust your project schedules to avoid committing people to work when they will be away.

You can also use this function to load the entire repository participant list into your project plan as resources. This saves time and avoids typographical errors.

This function can be used with Microsoft Project 2000/2002 using either PG Tools (Notes Client) or Project Web Publisher.

This function is accessed from the "**Export Holidays**" item on the Participant Navigator. This generates a file ("Holidays.c2k") that will be processed using the "M2k File Options" button on the Project Gateway Toolbar in Microsoft Project. The Holidays.c2k file is an XML document.

Exporting the Holidays.c2k file.

Click on the "Export Holidays" action on the Participant Navigator (located just below "create a new participant").

This will display an Export Participant Holidays form.

If using a Notes client, click "Create Holiday File", wait for the file to appear, and then click "Detach" to save the file to your local disk. Press Close. If using a browser, click "Click Here to Download" to save the file to your local disk. Press Done to return to the navigator.

Using the Holidays.c2k file

After loading your project plan (or after creating a new project) select the "M2k File Options" button on the Project Gateway Toolbar.

There are two holiday import selections at the bottom of this panel:

Import holiday (.c2k) file.

This function will set and/or remove non work days on the individual working time calendars of the existing resources.

Note that only those days defined using the "Schedule" function on the participant profile will be marked as holidays. All other individual holidays will be removed for each matching resource. Holidays that are present on the base calendar (typically called "Standard") associated with the resource will not be affected and will still apply.

When complete, a dialog box will appear showing the number of resources updated. All resources whose names match the participant names will be updated. The PGLog.txt file will contain the list of updated resources if the "*Create Log File for Support*" is enabled on the Help/Options panel.

Import holiday (.c2k) file & add resources

This function will add all Repository participants to your project plan if they do not already exist and set and/or remove individual holidays. Only the resource name is set, all other attributes will acquire the current MSP default settings. A dialog box will appear when the function is complete.

Creating a resource list for a new project.

Use the File New command to create a new project. Save this as a .MPP file. Create at least one task. Now, use the *Import holiday (.c2k) file & add resources* command to load the resources list.

Enhanced Export Timesheet Data function

Web Implementation: WebExportTSFile.csv agent

Hierarchy Field Export:

This agent generates web page and .csv files from raw timesheet data. It has been changed to support a set of special "names" that can be entered into the "assignmentcodefieldname" field on the input form. These names are "H*1, H*2... H*9" When used these will direct the system to output the selected level of the Hierarchy field (which will contain the summary task name structure for imported projects). The additional code H*L will return the lowest level value, whatever it is.

If the assignment does not have a value in this position of the hierarchy, it will return an empty column value.

Organization selection criteria

A new option, "**Include only if this organization**" is provided to select all timesheets that belong to participants who are members of the selected organization or one of its sub organizations. A droplist of the organization profiles is provided for selection.

Notes Implementation: FileExportTimesheet Form

This changes the existing form so that, once the attachment is generated, the form is redisplayed showing the attachment so you can detach it. This is more convenient than the previous operation which required you to the all documents view to find the document.

DOCUMENT CHANGES

New Document Change Log Mechanism

For all Issue, Risk, Scope Change and Project Documents

One of the more difficult problems in an evolving project is keeping track of the small continuing changes made to existing documents.

While project document versioning is useful for retaining significant updates, it becomes excessive when used for every edit.

The best way we know to do this is to force the person making the changes to write down a short description of the changes made in each edit as part of that edit.

For most document types (issue, risk, scope and all project documents), there is now a "changes made" field at the bottom of the document form which appears when the document is opened for editing. This field does not appear when the document is first created.

The "Changes Made" field always appears empty when a document is opened for editing. Whatever text is entered into this field will be copied into the document edit log record.

For projects where the project manager wants to enforce the use of this feature, there is a new project policy option entitled "Requires changes to be documented each time a document is edited?". If this is set to Yes, then the user will not be allowed to save the document unless something is entered into the "changes made" field. Since the user name and revision date are associated with the log record, silly entries should not be a major problem

Note that the Change Log is always available for use. The project policy option controls whether or not the use of the change log is required for all document edits in that particular project.

The text of the change log entries is shown in the "Edit Log" section at the bottom of the

document. The change text appears at the end of each record in this log.

Enhanced Note and Journal Features

New Microsoft Outlook Export option

This adds a new link onto the web display of the "Note" action form labeled "Export to MS Outlook".

This link that executes a new agent that creates a small file that can be read by Microsoft Outlook to add an "event" into the Outlook calendar. The file is typed as text/calendar and uses the extension .ics.

Clicking the link creates the file that should launch MS Outlook if that application is installed and is bound to the .ics file type. Otherwise, the file can be saved to disk and then loaded into Outlook using the File Open command.

Outlook will read this file and create a calendar event entry. Note that we do not create a "Todo" entry because Outlook provides does not support the "Todo" part of the **vCalendar** data standard.

Note that the time of day shown on the event entry is probably not meaningful since many of the repository source documents (such as issues) maintain only dates, not times.

New Optional recipients on the SEND NOTE form

You can now add arbitrary recipients to the destination of a Note message. These are selected from the address book using a Notes client, or manually entered when using a browser. Any valid user name or email address may be used. Multiple addresses must be separated by commas.

New "Add to Top" Journal option

The Journal options form now provides the option "Add New Items to Top" . This puts each new note at the top of the journal document rather than at the end. This makes the Journal work like a personal weblog.

When this is used, each note will contain a timestamp and links, even if from the same source document assuming that timestamping and links are enabled. When the option is not used, timestamps and links are hidden for multiple entries from the same source.

New "Note" action on the Web Home page.

This allows Notes to be created from the Repository Center page without opening any document. The note will contain a link to Repository Center. This makes it more convenient to make journal entries for your quick ideas.

New "Note" action on the Web Journal form.

This allows you to quickly add entries without editing the journal document.

Program Profiles

New Identification Action

The program profile now has an "Identification" action. This allows the administrator to

rename a program, promote a subprogram to become a first level program, move the program from one parent program to another, or remove the program by merging its members into another program. When this action is used, the programs and associated projects are immediately updated.

The assignments and other project documents that carry program identification will be updated by the nightly background agents or this can be done immediately but running the Admin\Update Organization and Admin\Update Dashboards Now agents once all program changes have been made.

New Delete Action

A delete action appears for [PGADMIN] users to delete unwanted program profiles. The system first checks to make sure the program is not being used, and then requires you to confirm the action.

Extended Observatory Link

The program profile now contains a direct link to the logically associated Project Observatory Program Report.

Organization Profiles

New Identification Action

The organization profile now has an "Identification" action. This allows the administrator to rename an organization, move the organization from one parent organization to another, promote a suborganization to become a first level organization, or remove the organization by merging its participants into another organization. When this action is used, the suborganizations and associated participants are immediately updated.

The assignments that carry organization identification will be updated by the nightly background agents or this can be done immediately but running the Admin\UpdateOrganization agent once all the organization changes have been made.

New Delete Action

A soft delete action appears to allow browser based [PGADMIN] users to delete unwanted organization profiles. Notes Client [PGADMIN] users should use the regular document delete method.

Extended Observatory Link

The organization profile now contains a direct link to the logically associated Project Observatory Organization Report.

Participant Profiles

Holidays become Observatory Reservations

New features in PG along with a new agent in Observatory provide a much tighter integration of holidays. Now, when you create a holiday item using Schedule on a participant profile, the holiday will be automatically converted into an Observatory reservation. Holidays can also be

defined in Observatory and these will be interpreted by the Query function and by the Calendar generators (including export) as participant holidays, even though they were not entered in Gateway.

New Feature - Multi-Repository Holiday Synchronization

If multiple Gateway repositories are connected to a single observatory, holidays declared in any repository will be maintained in all repositories and as an Observatory reservation. So a holiday only needs to be entered once to be shown on the participant, organization and project calendars, as part of an Observatory reservation and as non-work days in Microsoft Project. Holidays can also be declared within Observatory.

A list of such "externally declared" holidays will be displayed when the Schedule command is used from the participant profile. The list will be titled "Other Holidays provided by Observatory." It will be displayed at the bottom of the Schedule form or dialog box if any such holidays are present.

New Observatory components are also required which will be posted as a service pack on our web site.

New Participant Reservations Report

A new report type labeled "Reservations" appears in the Observatory Analytics section of the participant profile.

If the participant is an Observatory Member, it will return a page listing all current reservations and a bar chart showing the time reserved. Note that this information is produced by the operation of both the Observatory Maintain Holiday Reservations agent and the Maintain Commitments agent. As a result, a newly declared holiday will not appear in the reservation workload graph until both agents have run.

New and updated Observatory components are also required which will be posted as a service pack on our web site.

Extended Observatory Link

The participant profile now contains a direct link to the logically associated Project Observatory Organization or Organization Member Report.

Team Profile Changes

Rename and Delete Methods

The names of team profiles can now be changed in two ways.

During the period immediately after the creation of the profile, the team name can be edited. Once 24 hours have passed, this is not allowed.

Note: You must not rename a team if it is in use. The 24 hour limit was provided as a convenience for team creators to correct misspellings or confusing names. If you know that the team name has been used, you must remove all uses before renaming or deleting it. The "DocsUsingTeam" toll is provided for this purpose.

The user must begin by using the action "DocsUsingTeam". This will scan the entire repository looking for any documents which contain the team name. This can take a very long time, particularly if done from a notes client, so a warning message will be provided for Notes users.

If no uses of the teamname are found, a dialog box or web page will be displayed allowing you to rename or delete the team profile.

Subscribe Action

The Subscribe action appears on Team Profile Type II forms. See **iCalendar** for more information

Project Profiles

New Project Statistics

The statistics table has been changed to show "Apvd Project Change:" Hours, Days, Cost in the DOCUMENTS column.

These statistics are gathered by summing the estimate fields of all of the APPROVED scope changes recorded for each project. The Maintain Dashboards agent maintains this information.

These new statistics are also exported to Project Observatory where they will appear as new historical graphics for the project and program reports.

New Project Policy Options

These changes add three new options to project policy: 1) Document Change Logs and 2) Control over document creation and 3) control over scope estimates.

Change Log Control option

For projects where the project manager wants to enforce the use of this feature, there is a new project policy option **entitled "Requires changes to be documented each time a document is edited?"**. If this is set to Yes, then the user will not be allowed to save the document unless something is entered into the "changes made" field. Since the user name and revision date are associated with the log record, silly entries should not be a major problem

Document Creation Control option

In some circumstances, a project manager may want to prevent new documents or document changes from being recorded on a project. For example, a project that is almost finished or about to be redefined. Here we added another option to prevent the creation of documents (issue/risk/scope/project documents). Status reports are not affected by this options. The project policy option is entitled **"Allow New Documents to be created"**. It defaults to "Yes." Setting this to No will prevent anyone who is not one of the project mangers or a PGADMIN from creating a document associated for this project.

Note: It will not prevent someone from moving a document from another project to this one (Associate action) from a web client.

Scope Change Estimate Control option

This change adds a new policy option entitled **"Allow approval with zero estimates"** in the Scope Change section that can be use to prevent the submission of scope changes for approval when they have no estimates. This option improves the rigor of the scope process.

Allow New Assignments option changes

This change extends the function of this existing option to prevent the creation of "Additional Assignments" for existing tasks ("New Coworker" function for Web Clients.)

Extended Observatory Links

The project profile now contains a direct link to the logically associated Project Observatory Project Report.

Integrated Observatory Search & Assign method

The project profile now contains a direct link to the resource search page of the Project Observatory system. Clicking this link will open the search page. Executing a search will return a results page that contains a new action item ASSIGN for each candidate resource. This item appears next to the usual RESERVE action which still functions in the normal way.

Clicking the ASSIGN button on the Observatory Search Results page will create a "New Assignment" form which is preset to the project and the selected resource and the dates of the search and the effort requested in the search.

This allows you to start from a Gateway project, Search for a resource using the skills, location and availability information provided by Observatory, and then create a task assignment in one integrated process.

Note that the only restriction is that the resource names used as member names in Observatory must match the Participant name using in the Gateway database. Otherwise, when the assignment form appears, no resource will be preselected.

The process passes the Repository identification to the Observatory as part of the search initiation, so it will work when multiple repositories are connected to a single Observatory database.

Project Status Report Form

New "Associate" Action

Associate allows you to change the name of the project to which the document is associated to correct an error accommodate a reorganization.

Automatic display of open issues and risks

This change adds support to show open issues and risks in the Project Status Report form. Also changed design so that milestones, issues, and statistics are displayed on open when the status report is composed using the action on the project profile for web users.

Key Questions Section

This adds eight additional yes/no questions to the project status report and a place to add a brief comment for "Yes" answers. These are contained in a specific subform so that they can be easily customized if required.

Have the Project objectives changed?
Have the assumptions in the project charter changed?
Has the deliverable scope changed?
Has the cost changed?
Is the project being impacted by external factors?
Are there review and approval problems?

Are there problems affecting the project team's ability to perform the work?
Are there staffing problems?

Issue/Risk/Scope Forms

Reassignment now sends a new email notification

This is a feature enhancement to send a new email every time an issue or scope change is assigned to a new person. The 5.1 release version sent an email only on the first assignment to a person.

Assignment Form

New "Identification" Action

The "Identification" action's button has been added to Assignment forms. This allows project managers and system administrators to change the name of an existing task. This action can be done only to manually created assignment documents. It does not appear on assignments that have been published from external schedules. When an assignment has coworkers, all of the coworker documents will be changed at the same time.

There is the possibility of creating user confusion when tasks are radically renamed, so it is suggested that this feature be used with some discretion.

Usage: Notes users will see this action only after going into Edit mode on the assignment. Web users will see this action only while viewing the document, they will not appear during editing.

New "Associate" Action

The "Associate" action's button has been added to Assignment forms. This allows project managers and system administrators to change the project to which the existing task belongs. This action can be done only to manually created assignment documents. It does not appear on assignments that have been published from external schedules. When an assignment has coworkers, all of the coworker documents will be changed at the same time.

There is the possibility of creating user confusion when tasks are switched to another project, so it is suggested that this feature be used with some discretion.

Usage: Notes users will see this action only after going into Edit mode on the assignment. Web users will see this action only while viewing the document, they will not appear during editing.

Enhanced "Reassign" Function

The reassign function has been extended. It now adds two new features. First, you now have the option to immediately notify the new assignee. Second, if the original assignee was marked as "reassignment required" in its participant profile, the system will now offer the option to reassign all other assignments of this resource within the current project.

In the Notes client

A reassign is done by going into Edit mode and selecting a new participant from the drop list of names as always. When the notes document is closed and saved, a new dialog box will appear to ask if you wish to notify the new assignee. This dialog has Yes and No buttons. After this, a second dialog box will appear if the original assignee was marked as "reassignment required". This dialog offers the option to repeat the reassignment for all other

unstarted assignments of the current project.

In the Web client

A reassign is done by selecting the "Reassign" action on the web assignment form. After the reassign form is submitted with the final selection of new assignee, a new web page entitled "Reassignment options" will appear. This page contains either one or two checkbox options. The first, which will always appear and which is checked by default, will allow you to send notification to the new assignee. The second, which will appear only if the original assignment was to a participant marked as "reassignment required" and which is not checked by default, will enable you to change all other similar assignments within this project. Upon submitting the form, system will either return directly to the original assignment, or display a results page containing a link to that assignment. The results page will appear if the email was not successfully sent, or if the multiple reassign option was used. In the latter case, it will list the tasks that were modified.

A New Assignment Form

This has been changed internally so that the assignment start date and effort can be preset in the calling URL. This is used by the integrated resource search function to transfer search results to the assignment form.

Deliverables Form

We have changes in this form to remove the previous restrictions on the total number of deliverables in one database and to allow more key events to be selected on a given project.

Associate Key Event

This changes the implementation of the "Associate Key Event" function on Deliverables forms for Notes clients (the web implementation is not affected.) This implementation will allow the use of large numbers of milestones and makes the Notes operation more consistent with the web implementation.

Note Client Operation:

1. Click on "Associate Key Event". This will display an action form allowing you to add or remove events.
2. Select the Add Event action and press OK.
3. A second form is displayed. Select the Project from the list and Press OK.
4. A third form is displayed which shows existing events and a list of those available for this project. Select the event to be associated and press OK.

Automated Deliverables Maintenance

Once a deliverable has been linked to project milestones or budgets, it is possible that the linked items might be removed. The system now will now modify the deliverable to indicate any such removed items. If "Notify on Red Condition" is enabled, it automatically will email the deliverable owner a message when a linked item is removed or obsoleted.

Project Name Change for Deliverables

When project names are changed, the corresponding changes are made in all the deliverables that reference them. In previous versions, only deliverables owned by the project were updated.

ADMINISTRATIVE CHANGES

New Admin\Delete Workplan Now agent

This agent will remove the .cpf file from a project profile, reset the project format to "project gateway" and delete every project assignment of this project that exists in the database. Once this has been run, it will be possible to "attach" a new schedule to the project. This was created for the rare situation where the published schedule is so out of date that it can no longer be synchronized, but the other project documentation needs to be preserved.

Document Tracking Agent

Document tracking will no longer notify about missing requirement documents for completed tasks.

SUITE COMPONENT CHANGES

Work Request System Changes

The major change to the work request system is that it can now be used to initiate scope changes and issues in addition to tasks and projects.

There are now new forms which allow the request manager to initiate repository issues and scope changes.

Several changes were made to improve the workflow.

Costing Center System Changes

The major change in costing is that each project now supports up to 20 charge codes, twice the previous number.

Repository Archive Changes

The change in the archive is the addition of an "UNDO" button to the archive request form. This may be used during the period (usually about 10 days) between when a project has been moved to the archive, and when its documents have been physically deleted from the Repository. During this time, this action will restore all of the Repository project information to its pre-archived state. Note that, after using this action, the user must change the project status back to an approved or on hold status. Otherwise the project will remain in the Finished or Canceled state and immediately become a candidate for archiving again.

Metrics Center Changes

There are no changes in the 5.11 release from the 5.1 design.

PART IV: Corrections in Project Gateway 5.11

Database Designs

Contents

Form & Subform Corrections

- A Timesheet form**
- Team Profile, Team Profile B**
- PDocTag subform**
- pgstatParticipantReports**
- "A New Project" form**
- Project Profile**
- Program Profile**
- Issue Form**
- Scope Change Form**
- pgxSecureTimesheet**
- pgxStatusReports**
- pgDvrFields**
- DependencyLink**
- WebFileExportTimesheet**
- Another Assignment**
- Assignment Form**
- Gantt Chart Form**
- pgDeleteDocForm**
- pgDvrFields**
- pgDvrOptions**
- pgDvrNOptions**
- pgCustomTodoWeb**

View Corrections

- Repository IssuesAssigned**
- Scope Change\5. by Investigator**
- Scope Change\7. by Program**
- Participants\6. Teams view**
- Reports\1. Performance by Project view**
- Repository\3. Documents by Author**
- Repository\4. Documents by Project**
- Repository\Documents by Classification**
- Repository\Documents by Program**
- Timesheet Views**
- Timesheets\By Date**
- Timesheets\By Person**
- Timesheets\Overhead Allocation**

Navigation Corrections

- (PGTSCCommonNav)**
- \$\$NavigatorTemplateDefault**

Agent Corrections

- WebEditNewVersion**

pgTodoSupport

WebMyIssues.CSV,WebMyIssuesB.csv.

MaintainTeamParticipants agent

XML Repository Link Agent

WebSetLogoAgent

ProjectGo\Assignment Transfer Agent

AskPGQuery

Timesheet Agent Auto Initiate

PGPostem Agent

(TSRQueryOpen) and (TSRQuerySave) agents used in Timesheet Web Operations

MaintainAccessControl Agent, New Admin\CorrectAccessFields Agent

HiddenTimeSheetsPast View

Repository Design Corrections

Form Corrections

A Timesheet form

1. Corrects an error which would cause one row of a timesheet to be incorrect in certain situations.

The problem would occur when 1) a previously saved timesheet was reopened for editing and 2) the previous timesheet had more than 16 rows of information and 3) at the time the timesheet was saved, the top row shown in the form was not row 1 of the data and 4) there was a nonzero value in the first column (Monday) for this row. In this situation, the "exitcell" process would incorrectly update the timesheet. This would cause a hours change in a row that was not intended to be changed. Since this happened without any user input, it could get stored and used without anyone noticing the error. This was a case were some code executed before the "table" was redisplayed.

2. Changed generation of email alerts for project policy rules to prevent incorrect reporting when actuals are preexisting on tasks.

The 5.10 version would falsely report (when timesheet monitoring was enabled) that hours were removed if there were preexisting hours on the assignment. The problem was only in the message generation, the timesheet itself was fine and the posting was done properly.

3. Changed to correct a problem which would occur when timesheets were approved by third parties or rejected by the creator. The symptom was that the task list would show tasks that had been removed when the timesheet was submitted. The internal problem was that the entire task list was being regenerated at a time when it should have been left unchanged. Depending upon the history of the timesheet, further editing could create additional problems. The data in third party approved timesheets was always correctly posted, only the visual display of the timesheet itself was incorrect.

4. Added an error message that appears in the rare instance when a timesheet is edited which was created from a no longer existing participant profile document. This should never occur in a production system, but might come up in an evaluation/training environment. The message explains the situation and directs the user to recreate the timesheet.

5. Corrected a problem wherein the EditLog would not be updated by the Submit, Approve or Reject actions. There are now explicit messages for these cases with the username and date/time of the action added to the log.

TimesheetSpecialCreate

A change was made in the periodstart calculation to solve a European timezone problem.

Team Profile, Team Profile B

Corrects a problem that occurs if the readers are set to members of this team, but the editors are set to Author. Symptom is that a member cannot see the team when creating a document. Replace forms and edit/save the existing teams to correct.

PDocTag subform

Corrects a problem which occurs if there are no tracking codes in the project wherein the word [None] shows up twice in the droplist.

Corrects a problem with version dates when versioning is done from Notes clients. Requires compatible changes in 4 project document views and WebEditNewVersion agent.

pgstatParticipantReports Subform

Corrects a problem with the "Workload View" report link which would generate either a bad link or a link to the wrong view.

"A New Project" form

Corrects a Notes user problem where in the program name that was selected when completing the "A New Project" form would not be correctly set in the project profile. Once the project profile was edited and saved, the program name field would be properly stored. This problem did not occur for web users.

June 21 - Changes the way the program selection list is generated so that only programs with program profile documents will be shown.

Project Profile

Changes the way the program selection list is generated so that only programs with program profile documents will be shown.

Program Profile

In the pgstat_ProgramReports subform the phrase "Planned by Resource" was corrected to say "Planned by Project".

Issue Form

Changed the formula for the issuestatusdisp field so that it would correctly show the "deferred" status. This is used in an issues report and in issues/risks views

To support the enhancement of the work request system in 5.11. Added a field named "taskhelpdisplay" after the creation date. This field is used by the 5.11 work request system to provide a link to the originating request. The field name is the same as that used in the assignment form.

Modified the pg_automail field Remarks for the resend of email when assignee changed.

Scope Change Form

To support the enhancement of the work request system in 5.11. Added a field named "taskhelpdisplay" after the creation date. This field is used by the 5.11 work request system to provide a link to the originating request. The field name is the same as that used in the assignment form.

Modified the pg_automail field Remarks for the resend of email when assignee changed.

Changed the PCFAgeDisp field so that scope changes will stop aging when approved. This same logic was incorporated into WebMyIssues.csv so that the document and the report will show the same age.

Changed to add policy validation for nonzero estimates when submitted for approval. This allows the project leader to prevent scope submittal when estimates have not been recorded.

pgxSecureTimesheet

Cosmetic change of appearance to remove misleading "Reader:Everyone" text and revised

"Editors" to say "Readers and Editors".

pgxStatusReports

Changed to include [PGADMIN] in the edit access list in addition to [PGMASTER]

pgDvrFields

Changed "ValidateDeliverableName" field to prevent notes overflow error when more than about 800 deliverables are in the database. Now uses dblookup on validate rather than dbcolumn.

DependencyLink

Changed to add prev and next action buttons.

WebFileExportTimesheet

Removed unused script code, no visible change.

Another Assignment

Changed to hide the "Associate" action when used with "Another Assignment"

Assignment Form

Changed the calculation of the "pg_groupname" field so that the groupname is reset whenever the assignment is edited. This corrects a problem which occurs if an assignment is reassigned to a new resource and then reassigned back to the original resource. In this second reassignment, the group name was not being reset. This left the assignment with the correct resource name, but a (possibly) incorrect groupname.

Gantt Chart Form

1. Corrected the design to hide the Query_Save field when viewed by a Notes client.
2. Corrected the design to improve the appearance of the file attachment fields when viewed by a Web Client.
3. Added a new validation so that, if the title field is blank, the name of the subject will be put into that field when the document is saved. This prevented the creation of "blank" titles.
4. Changed the web operation to remove the "My Chart" default title entry,

pgDeleteDocForm

Changed so that the browser will return to the issues/risk navigator when an issue or risk was deleted. The 5.1 release returned to the documents navigator.

Deliverables Related

pgDvrFields

pgDvrOptions

pgDvrNOptions

Changed the pgDvrFields subform and the pgDvrOptions and pgDvrNOptions forms to properly generate the revised deliverable name. The existing design could get the wrong default text if the deliverable had been moved to and from first level status during its life.

pgCustomTodoWeb

Removed an unnecessary validation formula in the choices field.

View Corrections

Repository IssuesAssigned Scope Change\5. by Investigator

Prevents a problem where some issues may not show up if assigned to the user in an issues/scope by investigator web report.

Scope Change\7. by Program

Corrects a problem with the alias name. This may not have any visible effect.

Participants\6. Teams view

Changed to show up to 8 lines of team members in notes client. No functional impact.

Reports\1. Performance by Project view

Added an "Earned" column to this view. Earned=%complete times reference work value. Totaled.

Repository\3. Documents by Author

Repository\4. Documents by Project

Repository\Documents by Classification

Repository\Documents by Program

Changed the sort order and the data used to show version dates. The result is that older versions should be listed in reverse chronological order. There is a corresponding change in the pDocTag subform and in the WebEditNewVersion agent.

Timesheet Views

Changed the "form" formula on these views to enumerate the two standard forms "Timesheet" and "TimeSheetWeb" for special handling. The 5.1 version uses the match "Timesheet*" which effectively prevents the creation of a TimesheetSpecialCreate form.

Timesheets\By Date

Timesheets\By Person

Timesheets\Overhead Allocation

Navigation Corrections

(PGTSCCommonNav)

Corrects a problem with the display of an error message when the user name is not associated with any participant.

\$\$NavigatorTemplateDefault

Changed the formatting of the URL links to eliminate forced uppercasing of urls to eliminate problems in case sensitive server environments.

Agent Corrections

WebEditNewVersion

This modifies the way in which the VersionNotice field is reset. Works in conjunction with changes in the pDocTag subform and the project document views.

pgTodoSupport Script Library Change:

This corrects a problem wherein issues assigned to a person would not show up on the assignee's calendar report.

WebMyIssues.CSV

Revised to correct a minor problem which prevents "created" and "program" columns from being exported in a custom spreadsheet. This is a very minor problem. Replace the released version of the agent with this one to install. April 5 revision to add feature, see below.

There was another problem where the My Issues report would not find issues for a person if though such issues exist. The problem was that the lookup by name using the exact match option would prevent finding any issues for that person if the first issue in the Repository/Issues Assigned view for that person had a non blank classification code. This seems to us to be a bug or at least undocumented behavior in Notes, but the agent was changed to workaround the behavior. The change was made in the method "CreateIssueReport".

Changed aging calculation for issues and scope changes. Issues now stop aging when closed. Scope Changes stop aging when approved.

Corrected two problems in the Document Tracking Report. In one, the author of document whose document type was not used in any project assignment was not listed in the third column of the report.

The second problem happened if there was an extra space between elements in a multiple element document required or created specification. This would prevent the assignment requirement from matching to the actual document. As a result there would be two separate entries shown in the table where there should have been only one.

Changed the way notes icons were referenced for Notes 6 compatibility. Similar change in **WebMyIssuesB.csv**.

MaintainTeamParticipants agent

Corrects a problem which prevented the recompilation of this agent in the 5.10 release because of a reference to a function (gt) whose name was changed in the release. The release version of the agent would function, but not recompile.

XML Repository Link Agent

Changed content of an error message that is generated when incorrect database name was used to properly include the text of the incorrect name.

Changed the way Outputs are evaluated to prevent double counting due to capitalization or trailing spaces in assignment document lists.

WebSetLogoAgent

Changed to report exact error if unable to modify Administration document.

ProjectGoAssignment Transfer Agent

Changed so that a task becoming actually finished will always be sent out if it was sent previously. Prevented change in planned start from triggering resend.

AskPGQuery

Changed the icons displayed for progress in the project synopsis to match those now used in

the project dashboard

Timesheet Agent Auto Initiate

Presets the OrigWthisPer member of LsDays array so that policy analysis will operate correctly when there was existing work in this timesheet period.

Presets the LsDB field to prevent "document has been deleted" errors when timesheet is submitted.

PGPostem Agent

Changed existing behavior when preexisting work history hours are replaced with zeros for some period and total assignment work is zero. Previous version would not change assignment in this rare case. New version will reset assignment actual work and work history, but will leave assignment start and force actual work to .1 hrs. This is a very rare situation since it requires that the previously posted timesheet was physically deleted.

(TSRQueryOpen) and (TSRQuerySave) agents used in Timesheet Web Operations

1. Changed initiation of timesheet to display preexisting hours recorded in assignment document for that period (if any).
2. Changed generation of email alerts for project policy rules to prevent incorrect reporting when actuals are preexisting on tasks.
3. The 5.10 version did not properly load preexisting assignment work onto the new timesheet. This was a rare problem which only occurred when a timesheet had been posted against an assignment, then physically deleted, then a new timesheet was created containing that task. The previously posted hours should have appeared on the timesheet, but were not displayed.
4. The 5.10 version would falsely report (when timesheet monitoring was enabled) that hours were removed if there were preexisting hours on the assignment. The problem was only in the message generation, the timesheet itself was fine and the posting was done properly.
5. Corrected a 5.10 problem wherein the forward looking window for additional tasks would not appear to work. What was happening is that the date check was made after the assignment was incorporated in the list, hence the list would show exactly one assignment outside of the window.

MaintainAccessControl Agent, New Admin\CorrectAccessFields Agent

This corrects a problem wherein some versions of the MaintainAccessControl agent could blank the edit access field in the administration form, timesheets, project and participant profile documents which were not supposed to be modified by that agent. The new version of this agent will never modify those documents.

The Admin\CorrectAccessFields agent is provide to restore the proper edit access list values in any documents which were affected by the agent. It needs to be run only once after an existing database has been updated to the 5.11 design.

To determine if this condition exists in your database, open for reading any participant profile that has not been modified in the past week and look at the "Editors:" field which is displayed in the Document Access Control section at the very bottom of the form. If this "Editors:" display is blank, then this problem exists and the Admin\CorrectAccessFields agent should be run.

HiddenTimeSheetsPast View

Corrected a problem wherein an orphaned replication conflict timesheet would prevent the creation of new timesheets for the user.

PART V: PG511&512 Changes in the Project Gateway Tools

Microsoft Project XML Macros (MSP 2000, 2002)

This version provides a new edition of the macros which you should install. Note that during reinstallation, you will be asked to confirm the change some 17 times.

Corrections

We have made a number of internal changes in the macros to make them more tolerant of unusual data and to detect project problems before publication. In particular, blank resources are now detected and must be removed prior to publication.

Holidays (.c2k) File Support

You can now import the .c2k file produced by the Export holidays action on the participant navigator to preset non-work days for your resources.

Using the Holidays.c2k file

After loading your project plan (or after creating a new project) select the "M2k File Options" button on the Project Gateway Toolbar.

There are two holiday import selections at the bottom of this panel:

Import holiday (.c2k) file.

This function will to set and/or remove non work days on the individual working time calendars of the existing resources.

Note that only those days defined using the "Schedule" function on the participant profile will be marked as holidays. All other individual holidays will be removed for each matching resource. Holidays that are present on the base calendar (typically called "Standard") associated with the resource will not be affected and will still apply.

When complete, a dialog box will appear showing the number of resources updated. All resources whose names match the participant names will be updated. The PGLog.txt file will contain the list of updated resources if the "Create Log File for Support" is enabled on the Help/Options panel.

Import holiday (.c2k) file & add resources

This function will add all Repository participants to your project plan if they do not already exist and set and/or remove individual holidays. Only the resource name is set, all other attributes will acquire the current MSP default settings. A dialog box will appear when the function is complete.

Creating a resource list for a new project.

Use the File New command to create a new project. Save this as a .MPP file. Create at least one task. Now, use the *Import holiday (.c2k) file & add resources* command to load the resources list. Note that the .mpp file must be saved and have at least one task before the holiday options will become accessible on the M2K file options dialog.

PG TOOLS Changes for Notes 6 Operation

A change was made to allow the list of databases provided by a Notes 6 server to be displayed in the PG tools dialog boxes. This is backward compatible with all previous databases.

A change was made so that the exported project hierarchy would be properly constructed when using the Make Project function in systems running code pages for asian languages 936, 932, 950 and 949.

Gantt Template Changes

A change was made so that new Gantt charts can be made from templates which use the new AutoAlign modes.

Synchronization Changes

A change was made so the previously published assignments that were missing in the current project plan would be added to the plan during sync update project as if they were Notes created assignments. Previous versions of the system would simply ignore these orphaned assignments and they would have to be remove manually.

This change minimizes the effects of using the wrong revision of a project plan. The side effect, however, is that you should not delete assignments from your project plan prior to doing sync update project. All deletions should be done after sync update project and before sync update notes. That will ensure that all deletions in the plan are implemented by making the repository assignments obsolete.

Special Task Level Update Mode

A feature was added for a specific customer which allows task by task determination of the override of notes actuals. If there is a field map field named "UpdateMode" (case sensitive), and if the corresponding project plan field (as defined by the field map) contains the text value "Y", then the project plan data for the assignments of that task will override the notes data for those assignments.

Note that this flag is also interpreted in the other direction. It prevents Notes data from updating assignments of the project task.

Special New Project Profile Field Preset function

This feature allows a user to have the system create up to 9 user defined project profile fields at the time the project is first published. Before publication, the user must setup a section in the marinpmg.ini file labeled "[projectprofilefields]". In this section there can be entries of the form "f0n=fieldname:value"

E.g.

```
[projectprofilefields]
f01=mySpecialField:AABBCC
f02=mycodename:CX0021
```

This will create two fields in the new project profile document:
Field:"mySpecialField" with the value "AABBCC"
Field "mycodename" with the value "CX0021"

The values of these ini entries will be deleted when they are used.

Reserved Field Names "SpecialField1" and "SpecialField2"

Do not use these names in the the Field Map table. They are used as part of a particular customer implementation.

New INI Option [UpdateNotes], "SetRefOnResetOnly"

This is a option to control a subtle behavior that may be of importance to those project organizations using Earned Value tracking methods.

When an assignment is published, the system records both the "scheduled" data (start,finish, workhours, and cost), as well as a set of "reference" data. (ref start, ref finish, ref work, ref cost). The reference data is generated from the "baseline" data of the assignment if such data is available or the current data if no baseline is set.

For the purposed of computing Earned Value, the reference data is used to define BAC and BCWS.

When a project is synchronized with the "Reset Reference" option enabled, the reference data is reset for every assignment in the database to the current baseline values.

So for original publication, and for deliberate baseline changes, the reference data is exactly the baseline data and hence exactly correct for Earned Value calculations.

When the database is updated and the "ResetReference" option is not enabled, the reference values in the existing published assignments will not be changed. The preserved the baseline, just as you would want.

However, when, during such an update, a new plan assignment is added to the database, the default behavior of Project Gateway is to set reference data into that assignment (using the baseline data in the project plan if available). This increases the "reference" totals shown in the repository and hence the BAC and possibly BCWS.

The new option "SetRefOnResetOnly=1" may be set to prevent this "incremental" baseline adjustment. If enabled, new assignments will be published without reference work or reference cost, (ref start and ref finish are set). Hence the project reference work total will be unchanged. Only during a subsequent update when the "ResetReference" option is set will the reference data be created for these assignments.

This allows a strict evaluation of Earned Value since the BAC cannot change between formal baseline updates.

The magnitude of the effect that this controls is dependent upon the quality of the original plans. If many assignments are being added every week, then the baseline comparisons may not be very meaningfull except as a way of evaluating the quality of estimates. In projects with this level of change, EV analysis may not be possible. If very few assignments are added, then this option will make a very small difference. In between, where the new work might be adding 1-2% to the baseline each week, using this option will allow the EV trends to be more meaningful.

[UpdateNotes]

SetRefOnResetOnly=0 Default operation. Reference values work and cost will be created whenever a new assignment is published for the first time, but will be updated only when the "ResetReference" option is used.

SetRefOnResetOnly=1 New assignments will be published without reference work and cost values.

New INI Option [Current] "KeepObsolete"

This option controls how a previously published assignment (i.e., an assignment in the repository that was created by the project gateway tools rather than by the user), is treated when it is not matched to the current project plan during the synchronization process.

This option was created for a single customer site. Since it has some specialized uses, we have documented it as part of the product set.

The default behavior, which is the documented behavior of Project Gateway for the past 10 years, is that, when Updating Project, the assignment will be ignored. When Updating Notes, the assignment will be marked as obsolete and hence removed from the the project for most purposes.

The optional behavior is that, when Updating Project, the assignment will be treated as if it were a manually created assignment. This means it will be added to the project plan as an additional assignment on that task. Conversely, when Updating Notes, if the assignment is not matched, it will be treated in the same way that a manually created assignment would be treated which is to say it will be left exactly as it is and not made obsolete. Note that, if you run the full cycle (Update Project followed by Update Notes) these assignments will be added to the plan and then resynchronized as published assignments for the current plan.

Note that, if this option is enabled, nothing will ever be made obsolete. Even if you remove the assignments from your plan and do Update Notes, they will be preserved in the database!

[current]

KeepObsolete=0 - normal operation, default. Previously published assignments that are not part of the current project plan will be ignored when updating project and marked obsolete when updating Notes.

KeepObsolete=1 - special operation. Such assignments will be treated as if they had been manually entered into the repository rather than published from a project plan. As such they will be added to the project plan during "Update Project" and, if unmatched, left alone during "Update Notes".

The one circumstance that this option might be used is as follows:

Suppose you had published a plan and updated it several times, and subsequently lost the recent version of the MS project schedule. Under normal operation, if you synchronized with an early version of your project plan, the assignments that had been created later in the life cycle would be ignored when updating the project and made obsolete if you completed the cycle and updated Notes.

With this option enabled (KeepObsolete=1), these unmatched assignments will be treated as if they were manually created in the database and will be added back to the project plan. That still will not necessarily reconstruct the exact project plan version that was lost, but it will ensure that all the assignments that were in the database, and hence all the actual hours already recorded, will be added back to the project plan.

Note that there was an error in one of the 5.11 builds which inadvertently enabled this option. This is corrected in 5.12.

Correction for a Rare Crash during synchronization.

V5.12 contains a correction to a problem which prevented the system from completing synchronization when updating a project plan that contained no assignments for a particular task from a database that contain one or more assignments for that task. This problem would be reported as a "stack overflow" in MS Project.

Project Web Publisher

A change was made to add support for the client side option "ResetAllNotesActuals=1" in the [UpdateNotes] section of the marinpmsg.ini file.

When this option is used, the actuals in Notes will be replaced by actuals found in the project plan. This option should not be used if timesheets are used for the same project because the sync process may overwrite the posted timesheet data.

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