

Installation

People

There are two key players in the installation of the system.

The Notes Administrator

This person must have use of the Notes Administrator and Designer tools and be familiar with the usual processes of creating databases and access control.

The Application Administrator

This person should be designated into the [PGADMIN] role by the Notes administrator for each of the databases. The application administrator will be the person who sets the various application options and create the profile documents for new organizations, participants, and programs. This person should read both this document and the Collaborative Change Management User Guide.

System Requirements

Client:

Notes clients 6, 6.5, 7 or later.

Web browsers:

Internet Explorer 6 or later, Firefox 1 or later, Mozilla 1.6 or later, Safari RSS or later, Netscape 7 or later.

- Javascript must be enabled.
- Cookies must be enabled.
- Java applets should be enabled.
- A PDF viewer such as Acrobat is required for Gantt Chart display.

Server

Domino Server 6, 6.5, 7 on Windows, Linux, Unix. The use of 6.5 or later is recommended for all systems that will have web access.

At least 1GB of available disk space.

Domino 390 installations may require additional support, contact Marin Research.

Installation Time

The complete installation and setup of the system will take about an hour.

Installation Procedure

1. Retrieve, and Copy each of the system databases. (Notes Administrator)
2. Set the Access controls for each database. (Notes Administrator)
3. Setup and configure the administration forms. (Notes Administrator and Application Administrator)
4. Sign the Production Databases. (Notes Administrator)
5. Activate the database agents in each database. (Notes Administrator)
6. Setup the Repository Structure. (Applications Administrator)

The Repository ID

Before you begin you will need to have a Notes User ID available that will be given manager rights to the new databases and which will have rights to run unrestricted agents on the server. You should create a new ID for this purpose.

Email that is sent by agents will show this ID as the "From" field. Thus it would be best if this were not your personal ID, because people would think that all these reminders were coming from you (and could decide to reply.)

If you do use the server ID, then make sure that, in this database, this ID is set as an "Unspecified" user type, not as a Server type. This allows it to be used from a client as well as by a server agent.

Note: *We really do not want you to use the serverID.* You should create an ID (e.g., "Project Repository") for this purpose that has a mail file so that the replies that are inevitably sent by users will have some place to go.

Repository ID Agent Rights

The UserID used to sign the agents must be given the ability to run unrestricted agents in the Agent Manager section of the server document. Only a few of the agents in our designs actually require the "unrestricted" status. Those that do need the extra features to use local "temp" files on the server in order to construct attachments such as PDF Gantt Charts and XML files.

ECL

The Execution Control List for the UserID used to sign agents must have all possible authorities. This dialog is accessed as an Action.

Server Settings

Agents should be allowed to run for relatively long periods. We suggest setting the timeout to 30 minutes in small repositories (50 people, 100 projects) up to 2 hours in very large ones. Please do not panic at this statement, most agents run for a short time, often less than a minute per day. However, runtimes vary greatly depending on the number of projects, participants and recent changes. Hence, we feel it is best simply to make sure that the agent manager will allow them to run to completion.

Everything runs quickly in a new small database so you may not need to adjust your agent timeout limits immediately. Unfortunately, the effects produced when agents do not have time to run to completion are subtle and can show up as out of date totals, access control problems, disconnected links, etc.

The following agents are typically the longest running agents:

XML Project Observatory Link.

Maintain Dashboards

The following agents are critical so far as maintaining proper operation:

MaintainDashboards

MaintainAccessControl

ProjectGo\Process Tracking

ProjectGo\Action Tracking

Step 1. Retrieve and Copy the databases

The system can be installed on Notes 6 and later. Any Notes server platform can be used. The actual installation and setup procedure is done from a Windows Notes 6 Administrator client.

Installation Packages

The software is made available in a web downloadable package and also in a ISO CD image.

The web packages must be unzipped with a password that will be provided by Marin Research.

Note that everything is located under a top level "CCM" directory.

../DATABASE

....R6/

Installation files in ODS43 format.

../DOC

Contains the full text of both manuals provided in PDF format.

../DEVINFO

This contains a detailed design analysis of the database designs produced by the Ives Team Studio(TM) software.

Planning your Database Names

Before you begin, define a set of file names and titles names for the new databases.

We suggest that the file names should be as short as possible to minimize the length of URLs that will be generated in emails sent by the database agents.

Do not allow any spaces or special characters such as & % ! etc. in the pathname or the filename. Such punctuation will prevent some parts of the system from correctly functioning in web operation.

We suggest that the database titles should begin with some common characters so that they are found next to each other in the Database Open List. Database titles are displayed throughout the system in very prominent places. Choose a short title that will not cause wrapping.

Subdirectories

1. In general, URLs are shorter if the databases are located in the root directory, however, you can place them in a subdirectory so long as the subdirectory name does not contain spaces or special characters.
2. Keep the subdirectory path as short (in length) as possible.

Marin Research Database Design File	Suggested File Name	Database title
CM10REPO.NSF	CM1R.NSF	"Co. Name Projects"
CM10ARCH.NSF	CM1A.NSF	"Co. Name Archive"
CM10WRKR.NSF	CM1W.NSF.	"Co. Name Requests"

Database Planning Worksheet

Marin Research Database Design File	Your File Name	Your Database title
CM10REPO.NSF		
CM10ARCH.NSF		
CM10WRKR.NSF		

Transferring the Marin Research Designs to your workstation

Using Windows Explorer, drag the database designs from the \DATABASE subdirectory of the distribution CD or download directory into your local Notes Data directory.

For each database from a CD, right click to open the "Properties" and uncheck the "read only" flag.

Creating your production databases

Starting from each of the database designs, **use File Database New Copy** to create each database on the server. Remember to rename the file and set the database title according to your plan. Copy the Database design, documents and the access control list.

You are making a new copy so that you will have a unique replica ID for your databases. We do not want you to have databases on your production system that might have the same replica ID as those which we distribute.

When done, open each of the databases on your desktop. Only the repository center database contains existing documents.

Step 2. Set the Access Control for each database.

Once the databases are available, the system administrator should setup the access control list for each database as follows.

The ID used to sign agents should be defined as Manager with the roles of [PGADMIN] and [PGMASTER]. This is essential for proper agent operation.

The Users should be defined as authors.

At least one, and at most a small number of people in each database should be given the role of [PGADMIN] so that they can make profile changes and generally correct data problems. This role is critical for the Application Administrator.

Those people, if any, who may be involved in making design changes or product support should be Designers and should also have the [PGADMIN] and [PGMASTER] roles.

Licensing Considerations

Find your Marin Research License agreement.

It is your obligation to limit access, using the Access Control Lists on each database created under this license, so that no more than the licensed number of named individuals have reader access or above to any of the databases created under this license. This is a named individual limit, not a concurrent use limit. You may use Notes Groups for the purpose of access control so long as all members of the group are counted as named users.

No anonymous (i.e., default) access is allowed to any system database from Notes or Web Clients. Allowing unlicensed users access to the database is a violation of the licensing agreement and a form of software piracy.

If you are unsure about the license terms or limits that apply to your site please contact Marin Research, Inc. Do not make the database(s) available (except for a limited period, non-production evaluation) until you have determined that you are in compliance with the license terms for your site.

Step 3. Sign your production databases

Using Domino Administrator, login under the ID you have created for this purpose. Select the server and database and use the "Sign..." command. Use the "Sign all design documents" option.

Step 4. Configure the database file names and URL's in the Administration documents in each database

The key to making the system function is very simple. Ensure that the correct file names and URLs are entered into each of the three administration documents. These are used by the databases to connect information from one database to author. If not set correctly, the system does not function.

Note that the Repository Administration form is already in that database, but the Request Admin Profile and Archive Admin Profile forms must be created by the administrator.

There are many important settings in these administration forms, but those listed below are critical for system operation.

We suggest the Notes Administrator setup and verify these specific items. All of the other settings on these forms can be left to the Application Administrator.

Our experience has been that 99% of installation problems are caused by incorrect entries in these fields.

Repository Administration Form - Filename and URL Fields

URL FOR THIS DATABASE

Enter the URL (web address) of this database if your server allows web access. Leave this field blank if web access is not permitted. Please note, if you leave the field blank, then many of the report functions normally provided to Notes users will be disabled because they generate HTML report pages.

The URL must include the full address through the database file name in URL format. Make sure that the name of the database is capitalized just as it is recorded on the server (database properties, information tag). This is particularly important on UNIX-based Notes servers which are case sensitive.

Note that this is the URL of the database as seen by the client.

This field is used to construct URLs throughout the application and included in system generated emails.

If your database is in the server's data directory root, then the form should be **<http://www.mysite.com/database.nsf>**

If the database is in a subdirectory path of the server's data directory, then relative path must be included.

e.g. <http://www.mysite.com/projects/repositories/database.nsf>

To test the URL, copy it into your web browser and open it. The Repository Center page for this database should appear. You can also test this value by clicking on the WebHome action at the top of the form after the form has been edited. If this action opens the repository to the home page, then your entry is correct.

URL of the Observatory Database

If you do not have an Observatory, make sure this field is left blank because the system uses the value of this field to generate report links.

Enter the URL of the Observatory Center database (this will be found in Observatory Administration form)

Select Connection Method:

If you do not have an Observatory, set this field to "**No Observatory**"

If the Observatory is on the same server as this repository, then select "via Direct Submission" otherwise select "via Email." Then enter at least one of the following two items.

Mail-in name of the Observatory - enter the name you have selected for the this Observatory in the Mail In Databases section of the Name and Address book.

Database filename of the Observatory - enter the name just as it appears on the File Database Properties information tab of the Observatory Center database.

Archive Database file name

Enter the file name of the Archive database, exactly as it is shown on the File Database Properties information tab. If you do not have an archive database, leave this field blank.

Request Center database file name

Enter the file name of the Request database, exactly as it is shown on the File Database Properties information tab. If you do not have a request database, leave this field blank. If you have more than one request database, enter the file name for the one that would be most likely to be of general interest to your web users.

Request Admin Profile - Filename and URL Fields in the Request Database

Request Center URL

Enter the URL used to open this database from a browser. This should include the filename of the requests database.

Production Repository

File Name - enter the file name of the Repository Center database (not the requests database!)

Archive Admin Profile - Filename and URL Fields in the Archive Database

URL of this archive database:

Enter the URL used to open this archive database from a browser. This should include the filename of the database.

Production Repository

Server Name - enter the name of the server where all of the databases are located, this must be the server where the agents are scheduled.

File Name - enter the file name of the Repository Center database. Note: NOT the archive database!

Step 5. Activate the database agents in each database.

Scheduled Agents are run periodically by the server. These perform a variety of important functions such as maintaining security, sending reminders and updating the project dashboard with current status.

All scheduled agents should be scheduled for operation on this server. Even though you may replicate the databases, all the agents should run on a single system to minimize conflicts. Each agent has been set for a nominal run frequency (usually Daily). You can adjust this as desired.

Activating your scheduled agents using the Agent Status Report

The Agent Status Report is a tool that is integrated into all of databases. This tool allows you to verify proper operation and to enable and disable the scheduled agents very easily.

Using the AgentStatusReport in the Repository

Open the repository database that you have just created.

On the navigator panel, on the "Reports" item.

On the Reports panel, click "Open the repository administration form."

This will display the Repository Administration Form which is also called the "Field Map" Document.

At the top of this form, you will see the "Agent Status Report" action button. Click it, and wait.

After a pause that may last 30 seconds, the Agent Status Report form will be displayed.

At the top of this form are two actions: Enable Agents and Disable Agents. These will affect all of the scheduled agents in the database.

If you are opening the database for the first time, look at the columns labeled Owner and ServerName.

In the Owner column, you should see the name of the ID which you use to sign the database (and which you should be using right now.)

If you see the name "DesignRelease" then you should stop at this point and go back to signing the database.

If the Owner names are correct, then select the *Enable Agents* action.

This function first checks to make sure that your current ID is a manager of the database. If not, you will get an error and will be stopped. So in a production system, no one other than a Notes Admin will be able to use these functions, even though the buttons may be visible to others.

Enabling the Repository agents will again take some time, perhaps as long as a minute to complete. When done, the agent status report will close. At this point you should close the database and reopen it. Note, when you use the Enable function in the other databases, it will be much faster because there are fewer agents to process.

Why close and reopen? Notes maintains a copy of the "agent status" in you client. This will not be refreshed until you reopen the database. Thus, even though the enable function has been done, a check of the agent list may show that the agent have not been enabled. To prevent this confusion, and to get the correct status, close and reopen whenever you use the enable or disable buttons.

Understanding the output of the Agent Status Report

The ASR report shows 5 columns

1. This will contain either yes or no for scheduled agents. Agents which are not scheduled will have "..." in this column.
2. This will contain the time last run for every agent. If the agent is a scheduled agent, and if it has never been run, it will contain the words "WHY NOT?" In a production system which has run for a week or more, the words "WHY NOT?" indicate either a problem or a deliberate action by some designer or manager to disable the function. In a newly created database, many of the agents will not run until the evening, so WHY NOT? will appear for the first day, but should be largely gone by the second day.
3. This will contain the name of the agent.
4. This will contain the ID used to sign or last modify the agent. This should be your "Repository ID" The name shown here must be listed in the server document as an ID with the rights to run agents on that server, otherwise the agent will never actually run, even if it is signed.
5. This will contain the name of the server on which the agent is scheduled to run. This must be the name of your production server.

Otherwise the agent will never execute. For non-scheduled agents, this will be blank.

Using the Agent Status Report in the other databases

The ASR is always found on the Administration Profile Document. Simply follow the Administration navigator items to find the profile document.

Activating Agents Manually

You can open designer and activate each agent individually or you can use the Enable function of the Agent Status Report to activate all of the scheduled agents in a single action. Whenever you activate an agent manually, make sure you are choosing the correct server and an appropriate scheduling frequency. Information on individual agents is found in the chapter entitled "System Agents."

Additional Setup for Connecting to Project Observatory

The system is Observatory enabled.

All that is needed to connect is to fill in the appropriate settings in the Repository administration form (Observatory setup). As soon as projects appear in the Repository, they will be transmitted to the Observatory.

In the Observatory, you should create or update the Origin Document for the repository and setup the Observatory Management Assistant rules for this repository.

Once these rules have been entered, the structure of the repository will be automatically copied and dynamically updated in the Observatory so that any changes made in the repository will be reflected in the Observatory.