Repository Setup - Part II

Creating Profile Documents

At this time you should create your organization profiles, your program profiles and your participant profiles. When this is done, the system will be ready for the addition of your projects.

Note, you must create a participant profile for each user of the system. Generally you want to create the organization profiles first, so that, when you enter the participant, you can associate them with the correct organization.

Programs are not strictly required, but you will probably have at least two groups of projects (development and support), so it makes sense to provide a way to organize them.

All profile information can be changed, but it is easier to enter it correctly than to fix it later.

Organization Profiles

You should create a set of organization profile documents to which participants can be assigned. These will serve as logical home pages for these groups and will provide reports and summary rollup levels for time summaries and workload forecasts. Even in very large groups, you should create a minimal hierarchy using no more than three levels. Otherwise the hierarchy itself may become a barrier to easily finding information in the various views.

Note that there can be any number of "top level" organizations.

To create an Organization Profile do the following steps:

Notes client:

1. Select "Participants" on the Repository Center Navigator then select "create a new organization profile" from the participants navigator.

Web browser:

1. Select "New Organization" from the Create menu on the Repository Center home page.

then...

2. Select "[New]" to define a top level organization or "[subgroup of ...] and enter the name of the new organization or subgroup on the next line.

In each Organization Profile, you should set the User ID as the Name and Address book ID of the organization manager. We suggest putting a brief description of the organization, department phone number, etc. into the document.

3. Close and save the new profile document.

Repeat this process until the entire organization tree has been entered.

Program Profiles

These can be created at any time, but should be created before the projects that will be associated with the program are uploaded.

We suggest you limit the number of levels of the Program hierarchy to three or less. For most sites, just one level of programs will provide adequate classification of projects.

To create a new program:

Notes client:

1. Select "Projects" from the Repository Center Navigator and then "create a new program" from the project and programs navigator.

Web browser:

1. Select "New Program" from the Repository Center Create menu

then...

2. Select [New] or [subprogram of ...] and enter the name of the program or the subprogram level on the next line.

Set the UserID field to the name of the program manager.

3. Close and save the document.

Repeat until all required programs have been entered.

Participant Profiles

Whether Participants are created during project upload or manually, you must manually edit each profile to complete the setup. **Note:** The real person associated with the Participant Profile needs to be in the Public Name and Address book before making these entries.

In most situations, you will create the new participant profiles manually as follows:

Notes Client:

Select "Participants" from the Repository Center Navigator and then "create a new participant" from the participants navigator.

Web browser:

Select "New Participant" from the Repository Center Create menu.

Participant Name

Enter the name for this participant as it will be used in the project management application. We strongly suggest that the format be lastname <space> firstname. This will allow alphabetic sorting by last name, making information much easier to find.

Organization

Select the organization that you have previously created for this participant.

UserID for Participant

Each person has a name they use to login to the repository.   This will be the User Name in the Person record of the Public Name and Address book. Within Project Gateway, this name is called the UserID and is entered several places including fields that are named UserID in the Participant Profile.

Enter the UserID for that participant.

Send Message to

You must enter the UserID or the email address of the person who should receive notifications about new assignments and overdue work.

Customizing the Online Guide

This is a part of the database provided for your customization. The Online guide view contains all documents created with the OnlineGuideForm. You can add or remove topics using either a Notes or Web Client. If you use a Notes client, then you can paste richtext, including pictures into the body of the document rather than be restricted to plain text.

We suggest that you consider adding topics for your organization and providing specific examples that use your own projects and codes so that your people can easily relate to the system.

Topics to add might include how to contact the repository administrator, who to call to get new organizations or participants setup, how to estimate projects, when initiate scope changes, etc.

To create a new topic from a Notes client, Create Other... OnlineGuideForm. To create a new topic from a Web browser, you must have [PGADMIN] role. If you do, display the OnlineGuide. In the lower center of the page is link to create a new topic.

The Online Guide form has a keyword field that indicates whether the topic is to be shown to Web users, Notes users, or both. This allows you to make two topics with the same title but different instructions for the two kinds of clients.