

Using the Repository Archive

Overview

The archive is a database for storing completed so that they can be retained for future reference, but removed from Repository Center.

Program	Project	Time	Progress	Issues	Process	EndsOn	Issues
Boyside Systems	Evaluation work for pipeline		X			06/14/2004	0/0
Implementation Projects	Work Request:request created monday					09/27/2005	
Industrial Products	for next week		X			05/23/2005	1/1
	My First Request		X			08/10/2005	0/0
	project from action item from assignmen		X			04/20/2005	0/0
	Project Request 2		X			08/10/2005	0/0
	Test For Project Request		X			10/10/2005	0/0
	Work Request:Development Project F		X			08/10/2005	1/1
Management Projects	plan2		X			05/24/2005	1/1
	system update test 4		X			04/20/2005	0/0

An active archive opened from a Notes client. The project dashboard is displayed. Note that all of the projects are completed or canceled.

The system will automatically archive finished or canceled projects. You can also manually archive projects at any time.

The system provides a limited UNDO mechanism that can be used to restore repository projects that have been recently archived.

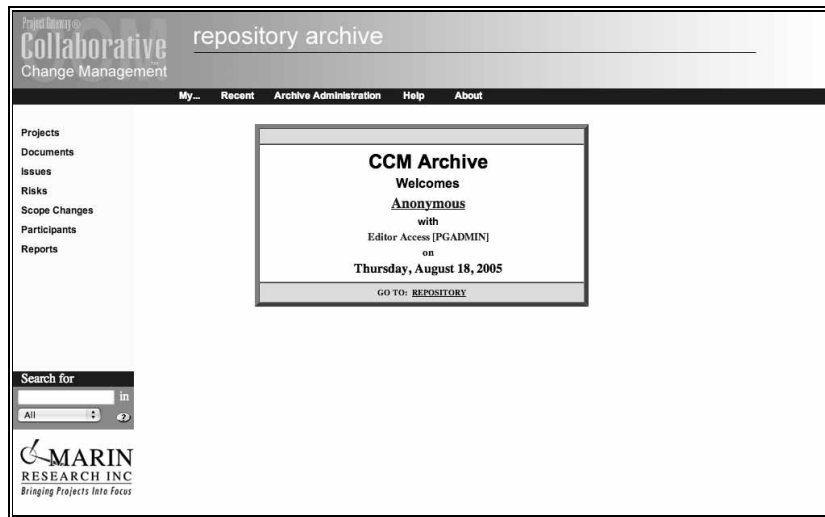
The layout of the archive is very similar to that of the repository. In general the same menus and navigators are provided. Some functions, such as favorites, news, guide, and home page document creation are removed.

There are several important options that control the operation of the archiving process. The most important of these options concerns how archiving will change the production repository. These are selected on

the Archive Profile form that must be set up in this database before archiving can occur.

The Archive Administration Menu and Navigator

Web users will see "Archive Administration" on the home page horizontal menu. Notes users will see "Archive Administration" on the main navigator



Archive database opened from a web browser. The left menu panel pops up to allow access to all archived information. Note that archive administration is found on the horizontal menu.

Archive Administration provides access to the list of pending and completed archive actions and to the actions for creating new project and deliverable archiving requests.

It also opens the Archive Profile View that should have exactly one document. This document is the Archive Administration Profile document. If this document is missing or incorrectly configured the archive will not function properly.

The proper configuration of the fields in the Archive Administration form are described in the Project Gateway Administration manual in the chapter entitled "Configuring the Suite Databases."

Project Archiving

What happens during Project Archiving

The archiving agent will move the following documents to the archive

1. Project Profile
2. All Issue, Risk, Scope Change and their response documents associated with the project
3. Project Documents and prior versions of same (all formats) associated with the project.
4. All Status reports associated with the project.
5. Discussion documents associated with the project.
6. Action Items associated with the project.
7. Assets associated with the project.

Review comments documents are not archived and will be deleted in the repository after archiving is completed.

Automatic Project Archiving

Automatic archiving is done as a two step process. A special agent detects projects that are ready to be archived. This agent creates an archive project request form.

The archive project request form is then processed by the normal archiving agent to move the project information to the archive.

Automatic archiving is done only in very specific conditions so that it will never occur accidentally.

Conditions for Automatic Archiving:

1. The project must be set to the approval state of Finished or Canceled. Since only the project manager or a PGADMIN can change the approval of a project, this will prevent anyone else from initiating the process.
2. The Allow Archiving checkbox must be checked in the project profile. If this is not checked, the project will not be automatically archived. The project leader can use this to "hold off" archiving as long as desired.
3. A certain waiting period must have elapsed from the effective date of the finish or cancellation before the archive request is created. This waiting period is set in the archive profile form. We suggest a default period of 14 days to allow plenty of time for the close-out of project work. Note that this time delay begins after the effective date set at the time the approval state is changed. So if, on the first of the month, a project is marked as finished, effective that day, automatic archiving will not begin until the delay period has expired. If this is 14 days as

suggested, then the project will not be archived prior to the 15th.

Manual Project Archiving

Using the Archive Administration Navigator or home page menu, select the "archive a project" action.

Archive Project Request Form

This form instructs the system to copy the project from the production repository to this archive and then delete the project in the production database. You cannot "undo" this action once the project has been archived, it cannot be restored to production status. All project assignments and supporting documents will be copied during the archive process.

Select Project: [Website design](#)

This displays a list of projects in the production repository (MainNotes: PGSR1Dempg.net)
Projects that have already been archived or for which archiving is currently pending will not be shown.

UniqueID:	951912264
Manager:	Anonymous
Program:	Development/Software

Status: Pending

Documents Archived: 0
Documents Marked for Deletion in production database: 0
Documents Physically Deleted in production database: 0
Request created by: Gay M. Cole/MainResearch on: 12/05/2001 02:35:51 PM

This will display a form that provides a list of all current projects in the production repository.

Select one of these projects and submit the form. The actual archiving is done by an agent that generally is set to run during the night (although the schedule at your site may be different).

Archive Project UNDO

It is possible for an administrator to undo the archive process and restore the project in the repository in certain situations.

Required Conditions:

1. In the archive administration form, at the time that the project was archived, the **Document Removal Method** must be set to Option 1 - Mark source documents for removal by project repository purge agents.
2. The time since archiving must be less than the and the preset delay of the PGDocumentPurgeAgent in the repository. The default setting is 30 days.
3. You must be using a Notes Client and you must have [PGADMIN] rights in the repository and archive databases.

To UNDO:

Use the completed requests view to find the archive project request document for the project.

Click the "UNDO" action button and follow the prompts.

As soon as the undo process is complete, go to the repository, open the project profile and change the approval status back to approved or hold. Otherwise it will quickly become a candidate for archiving again and disappear.

How UNDO works

When the system archives a project, it is not immediately removed from the repository. Rather, a change is made to each archived document that causes that document to disappear from all repository views and reports. It goes into a category called `xxDeletedDocuments`. The date of "deletion" is recorded in the document along with its original form name.

After a preset time period, the `PGDocumentPurgeAgent` will physically remove the document from the repository.

Before that time, the document can be restored to active status by the UNDO process (or by the Restore action button that will appear if the document is displayed).

So the Archive UNDO process simply finds all of the documents in this pending deletion status that were part of the archived project and restores them to normal status.

Archiving Profiles

Shadowing Profiles

Depending upon the setting in the archive profile document, the system may maintain copies of the following documents in the archive:

1. Participant Profiles
2. Organization Profiles
3. Program Profiles

These are maintained in the archive so that it is easier to navigate. The normal mode of operation is "Maintain Up to Date Copies" that will update the archive copy of a profile if the repository copy is changed.

Note that the archive process never deletes one of these profiles from the repository, it only deletes project profiles.