

Installing the Repository / Observatory Link

Overview

The Repository/Observatory Link connects a Project Gateway Repository Database to a Project Observatory Database. Any number of Repositories can be connected to a single Observatory.

The ROL software is found on the Project Observatory distribution CD in the \OBS\ROL directory. The contents of this directory consist of a Notes database file named "ROLV200.NSF."

This database will never contain any user data, it is provided only as a container from which you can extract new design elements and add them to your existing Project Gateway repository databases.

Installation Process

Review the *ReadObs* file in the \OBS directory of the distribution CD!

Using Explorer, copy this database into the \Notes\Data directory of your desktop Notes client (not the server).

Using Windows Explorer, change the file attributes on this file from Read Only to Read Write. (Select file, Since the file is stored on a CD, it is read only. But in order to modify the template, now or in the future, you must have Read/Write access. Select the file. Select the command "File Properties" from the Explorer menu, and uncheck the Read-only checkbox.

Using Notes, use the File Database Open command to open the ROL database (titled "Repository Observatory Link") on your desktop. Close it so that only the icon is displayed.

Signing the ROL database.

You should sign the ROL database before you copy its components to the Project Gateway database with the same ID that you used to sign the Project Gateway database agents.

Login using the ID used to sign the Repository. This ID should have the right to run restricted agents and the [PGMASTER] and [PGADMIN] roles.

Use the command Tools, Server Administration. Select the server and press the "Database Tools" button. Select the "Repository Observatory Link", and select "Sign A Database" with the option "Sign Every Design Note" and Press the SIGN button (not the DONE button.) This process will only take a few seconds.

Inserting the new design elements

1. Start with icons for both databases on your desktop. Make sure that someone has not already installed these extensions to your repository. If you are upgrading from Version 1, you should first uncheck the existing XML Repository Link Agent in your repository, then double click to open it in design mode, and change the agent's name to XMLRepositoryLinkOLD and save it before doing the following steps.

2. Copy the XMLRepositoryLink agent from the ROL database into the repository.

Open the ROL database, Goto Agents, Click on the XMLRepositoryLink agent. Press Edit Copy. File Close

Open the Project Gateway database. Goto Agents. Put the cursor anywhere on the agents list. Select Edit Paste. File Close

3. Copy the (BriefingAssistant) agent from the ROL database into the repository.

Open the ROL database, Goto Agents, Click on the (BriefingAssistant) agent listed. Press Edit Copy. File Close

Open the Project Gateway database. Goto Agents. Put the cursor anywhere on the agents list. Select Edit Paste. File Close

4. Copy the 2 views (XML Custom Field Definitions and XML Support) and from the ROL database into the repository view list.

Open the ROL Database. Goto Design. Select Views. Select the views. Then the command Edit Copy. File Close.

Open the Project Gateway database. Goto Design. Select Views. Select the menu command Edit Paste. Close

5. Copy the one form (XML Custom Field Definition) from the ROL database to the repository form list.

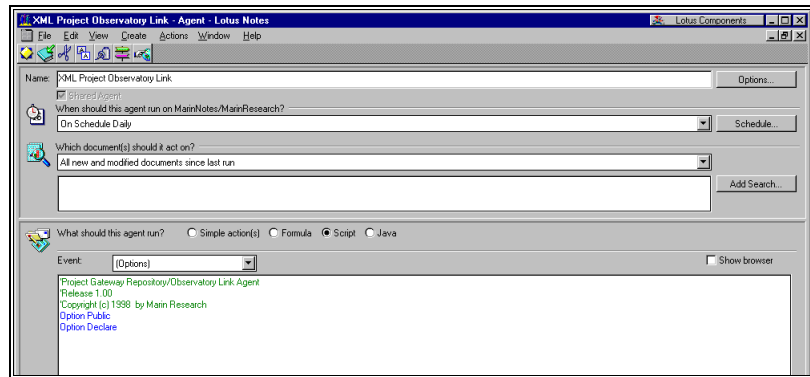
Open the ROL Database. Goto Design. Select Forms. Select the form. Then the command Edit Copy. File Close.

Open the Project Gateway database. Goto Design. Select Forms. Select the menu command Edit Paste. File Close.

Configuring the Agent

Note: If you are upgrading an existing system, get the declarations setting from the existing agent and copy them into the new agent.

1. Find the new agent "XML Repository Link" in the agent list of the Project Gateway database. It will be found near the end of the agent list. Double Click to open the agent for modification.
2. At top of the form select "Schedule Weekly" (or Schedule Daily if you prefer). Press the "Schedule Button" at the right. On the dialog, at the bottom, select the name of the server on which this agent should execute. This should be the same as that on which the other agents are running. OK the schedule dialog.
3. At the bottom of the form you will see a window containing the words "Option Declare" and a Copyright statement. Immediately above this is a list selection labeled: "Event".



Change the Event from "Options" to "Declarations"

At the top are four lines you must modify.

```
Const observatoryMailAddress=""
Const resourceMethod=1
Const useCostingCenter=1
Const usePMTTotalCost=1
```

observatoryMailAddress=

Set the first line to the mail in address of your observatory which you determined when you put it in the name and address book.

e.g. Const

observatoryMailAddress="ProjectWatch@MarinResearch"

resourceMethod=

- 1 - Report commitments down to the person level
- 2 - Report commitments down to the organization level only (not to the specific person)
- 3 - Report commitments down to organization level 2 only (not to the people within that group)
- 4 - Report commitments down to organization level 1
- 5 - Report all commitments to each project as a single entity

e.g. Const resourceMethod=1

useCostingCenter=

If you have a Project Gateway Costing Center database connected to this Repository, and you want to send the actual project costs from the costing center to the observatory, then set to 1 else 0.

e.g. Const useCostingCenter=1 or Const useCostingCenter=0

usePMTotalCost=

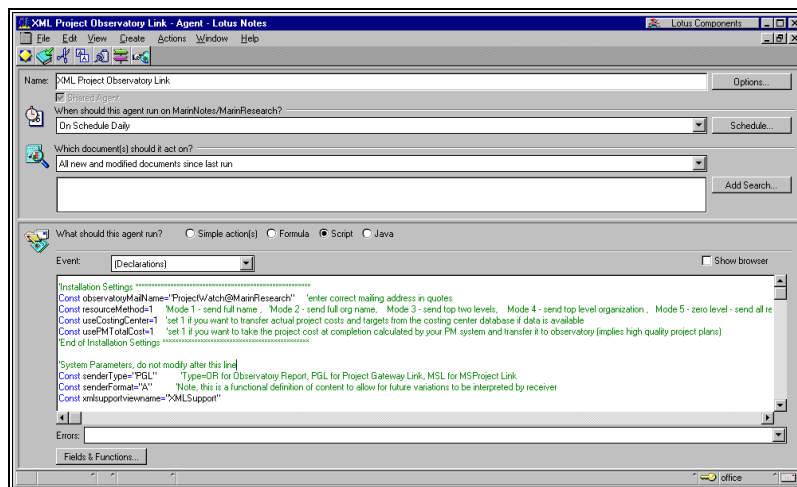
Project management applications such as Microsoft Project compute estimated project cost. These values are stored in the Repository. If you want to send these values to the observatory, set this option to 1, otherwise set it to 0.

Many times project planners do not have enough information to calculate meaningful project costs. If this is the case at your site, you will not want to send these poor quality numbers to the observatory.

e.g. Const usePMTotalCost=1 or usPMTotalCost=0

Review

When you are done you should have text like the following. **File Close and Save.**



Activating the Agent

Set the checkmark next to the agent name (XMLRepositoryLink) to enable the agent.

This completes the installation process. Assuming that you have entered the correct mail name, and that there is a mail path from the repository to the observatory, you should be transmitting project reports either tonight or this weekend.