

Upgrading Existing Databases

Overview

A Notes database consists of design documents and data documents. Using a Notes Client, it is relatively simple to replace the design of an existing database with a newer version of that design. You must have Designer rights to the database to do this.

The Project Gateway 5.1 Repository Center design can be used to replace existing Project Gateway 5.0x designs. Keep in mind, however, that many of the new features require additional information to be added to existing data documents after the design is upgraded.

Before you begin, make sure that all outstanding timesheets have been submitted, posted, and costed. Also be sure to disable all scheduled agents.

Preserving your existing design customizations

THIS IS IMPORTANT

If you are using a modified version of the Marin Research design then you should create a new empty database and copy into it all the design elements that you have modified before you make any changes. This would consist of your new forms, views, agents, navigators, subforms, shared fields and scripts plus any of our standard forms, views, agents, subforms, sharedfields or navigators that you have changed.

It is important to get a complete collection of all these components before you begin to upgrade the design because some or all of your modification work will be lost when the new design elements replace the existing ones.

Design elements that are not explicitly marked "Do Not Allow Design Refresh/Replace to Modify" in the design properties will be replaced. However, certain documents, such as the Profile forms, Assignment form, and issues form, have extensive internal changes in PG51. Therefore, you should install the PG51 version and then reintegrate your changes to it, rather than preventing the replacement.

Replacing your Repository Design - Notes R5

BEFORE YOU BEGIN

MAKE A BACKUP COPY OF YOUR DATABASE FILE ON ANOTHER SYSTEM. THIS SHOULD BE A COMPLETE FILESYSTEM COPY, NOT A NOTES DATABASE NEW COPY. DO NOT PROCEED UNTIL THIS IS COMPLETE. YOU MAY NEED TO RESTORE THIS FILE!

Note: If you do not have access to the server and cannot make a file copy, make a local replica of the database. This will require a workstation with lots of available disk space!

Move the just created local replica file into another directory and disable replication of this database.

If you need to do need to restore the original database, delete the server copy and then create a New Replica on the server starting from the local replica copy you have saved.

DESIGN REPLACE PROCESS

1. Open your existing database with the Notes Designer client
2. Open the "... Other" section of the "Resources" section of design elements and select "Using Database" Document. File/Document Properties will bring up the design document properties box. Click on the third from the left tab. Remove the checkmark shown on this tab next to "Do not allow design refresh/replace to modify."
3. Click on the "About Database" Document and remove the same checkmark.
4. Click on the "Icon" and remove the same checkmark.
5. If there are specific modifications to the design you know you want to retain, verify that these design elements have the "Do Not" checkbox checked. Note that if retain your version of a design element common to both databases, then you will need to manually apply our changes for that design element in your database.
6. Select the Repository Center database design provided with this release.
7. Use File \ Database \ New Copy (check "design only") to make a copy of this design. Set the file name extension to be ".NTF"
8. Open this NTF file. Use the command File \ Database \ Properties. Under the fourth-from-left tab, check the option "Database is a Template" and enter a name such as "PGV510." You have now created a template from the release database design.

9. Open your existing database. Use the command, File \ Database \ Replace Design. In the dialog box, find the Project Gateway Repository Center Database template you have just created. Press About... to verify the version and release date.
10. Press Replace. The process may take several minutes.
11. Add the Roles [PGADMIN] and [PGMASTER] to the database access control list if they are not already there. The PGADMIN role must be assigned to repository administrators.
12. Switch to the userid that you wish to sign the database. This ID must have both the PGADMIN and PGMASTER roles in the database. It must also have the right to run unrestricted agents (be listed in the "run unrestricted agents" field of the Agent manager section of the server document) for the server where the background agents run. It should not be your personal User ID.
13. Open the Administration client. Select the server where your existing server resides and then select the database. Under the Database Section of the Tools, select "Sign..." and then OK. This can take several minutes.

Updating Information Documents

In your database, go to Reports, All Documents In Database View. Collapse the view.

If you are upgrading from PG4 or earlier designs:

1. Delete the existing *Graphics\Template* documents in your database. Go to the Repository Center All Documents In Database View, Graphics/Templates. Select the 5 documents in this category. Edit Copy. Return to the All Documents In Database view in your database. Edit Paste.
2. Copy the *Online Guide* documents in the Repository Center Design and paste them into the All Documents View in your database.

Updating the Repository Administration (Field Map) Document.

Find the section entitled Field Map. Expand the Category. Double Click to Open the Document entitled "Field Map." Or click on "open the repository administration form" from the Reports Navigator panel.

Go to Edit Mode. Scroll to the Section labeled "Security". Change the setting from "Normal" to "Full" then back to "Normal." Now Close and save the document. The purpose of doing this is to allow the new fields in this version of this document to compute default values that are needed for the current release operation. Opening and close the document does not cause recomputation, you must change something, even though you change it back to the original value, to force the Notes Client to recognize that you have made a change so that it will ask you if you want to save the new version.

There are many new option settings in this form. You should review the setup instructions found in this manual and then make the appropriate settings for you site. Following the instructions found in the chapters entitled "Configuring your new Repository" and "Timesheet and Document Customization" to properly complete the process.

Updating Existing Profile Documents

There are many new settings in Project Gateway 5.1, particularly in the Project Profiles. Open each existing profile document, force some minor change (add/remove a space from the user id list for example), close and save each document. This will take some time, but will ensure that at least the default settings are in place for each project.

Activating the Updated Repository

Follow the instructions for new repository setup found in the beginning of this manual for agent activation.

Reintegrating your design modifications.

View Changes

If you have modified versions of standard Project Gateway views, you can generally replace the Marin Research view with yours. Be particularly careful not to replacing any PROJECT GATEWAY view that has an alias name. Those alias names are used in formulas and agents. Many parts of the system can fail when required views are not found.

Hidden views (those whose name is in ()'s at the end of the view list) must not be modified. They are used widely within the Project Gateway application, agents and API code.

Form Changes

If you have modified a form, then you should reinsert those changes into the new release version of the form. This is much easier if you have put those changes into subforms!

Navigator Changes

When you have made a modified version of an existing navigator, compare it carefully with the newer ones. Because PG51 supports both Web and Notes clients, many of the navigator formulas contain @if (@IsMember("\$\$WebClient;"@UserRoles)); formulas to define different actions for the two clients.

Note that there are two "Repository Center" navigators, one for Web clients and the other for Notes clients.

Subform Changes

Review any changes to the PG51 subforms carefully. Most of them are used for security and should not be changed.

Agent Changes

Use the PG51 release versions of all agents.

Replacing your Repository Design (Notes 4.6)

To replace your existing Project Gateway database design with the new release do the following:

1. MAKE A BACKUP COPY OF YOUR DATABASE FILE ON ANOTHER SYSTEM. THIS SHOULD BE A COMPLETE FILESYSTEM COPY, NOT A NOTES DATABASE NEW COPY. DO NOT PROCEED UNTIL THIS IS COMPLETE. YOU MAY NEED TO RESTORE THIS FILE!
2. *If you do not have access to the server and cannot make a file copy, make a local replica of the database. Move the file into another directory and disable replication of this database.* If you need to restore the original database, delete the server copy and then create a New Replica on the server starting from the local replica copy you have saved.
3. Select your existing database. Select File Database Properties to display the floating properties box.
4. Use View Design. Select "Using Database" in the "Other" list and click the design tab in the Design Document properties box. Remove the checkmark shown on this tab next to "Do not allow design refresh/replace to modify." Move the cursor to "About Database" and remove the same checkmark. Move the cursor to "Icon" and remove the same checkmark. If there are specific modifications to the design you know you want to retain, verify that these design elements have the "Do Not" checkbox checked.
5. On your workspace, select the Repository Center database design provided with this release.
6. Use File Database New Copy (design only) to make a copy of this design. Set the file name extension to be ".NTF"
7. Open the NTF file. Use the command File, Database Properties, Design. Check the option "Database is a Template" and enter a name such as "PGV510." You have now created a template from the release database design.
8. Re-select your existing database. Use the Command, Database Replace Design. In the dialog box, find the Project Gateway Repository Center Database template you have just created. Press About... to verify the version and release date.
9. Press Replace. The process may take several minutes.
10. Add the Roles [PGADMIN] and [PGMASTER] to the database access control list if they are not already there. The PGADMIN role must be assigned to repository administrators.
11. Sign the updated database using the *File Tools, Server Administration, Database Tools, Sign a Database* command.

This User ID must have both the PGADMIN and PGMMASTER roles. It must have the right to run unrestricted agents.