

# Introduction

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## ***Connecting Your Project Community***

Welcome! Marin Research, Inc. and its worldwide partners thank you for joining the Project Gateway user family. We hope that you will enjoy working with our product and that it will provide real value to your organization.

Supporting both Notes and Web clients, the Project Gateway system can significantly enhance team and management communication to help you deliver timely results. When coupled with the enhanced worldview, skills-based resource planning and analytic power of Project Observatory, you have the ability to evaluate and coordinate organizations and programs of any scale.

In addition to providing the most comprehensive array of project information services available anywhere, the Project Gateway system is user customizable. An array of easily selected options and fully open source code allow you to create a system very well suited to your enterprise needs, today and tomorrow.

### **New features in the Repository Design**

The PG5.1 Repository design contains all the features found in the Project Gateway 5.04 plus the following significant additions.

**Comprehensive Scope Management:** The system now provides a way to request, document and control changes in project requirements and content over the lifetime of the project. A sophisticated approval process ensures consistency and automatic escalation.

**Enhanced Issues and Risks.** The system now splits issues and risks into separate categories, but still allows you convert one type into the other. It now has the ability to indicate that an issue or risk affects multiple projects and to track work hours spent working on related assignments. Issue categories, status choices and priorities can now be customized without programming.

**Calendar Reports.** This new reporting facility (for both Notes and Web Clients) brings together all of the "time-related" information in the repository onto a simple calendar page for any project, program,

participant or organization. These reports show issues, milestones, risks, scope changes, overdue tasks, missing project documents, participant holidays, and project events with direct links to the relevant documents.

**Extensive Tabular Reporting:** The system now provides extensive and configurable tabular reports for issues, risks, documents, scope changes, assignments, status reports, etc., that can be displayed in a browser.

**CSV Export.** Issues, Risks, Scope Changes and selected timesheet data can be now be exported to CSV format for use with spreadsheets and other databases.

**Project Policy.** The system now provides project-specific settings for who can create assignments, default read access on new documents, automatic timesheet monitoring, rule based scope change approval, new issue notification and other functions.

**Project Approval.** The system now provides methods to put projects on hold and to publish them as proposals. These controls are integrated with the reporting and timesheet systems.

**Flow-through Archiving.** When a project is marked as finished or canceled, the system will update Request Center and Observatory with close-out status, archive the project, and remove it from the repository in a coordinated fashion with no additional manual action.

**Simplified timesheet operation.** One click creates or reopens your timesheet for both Note and Web users.

**New Assignment features.** You now can create assignments for several people in a single action, create dependencies between manually created tasks, notify people when you assign them, exclude specific assignments from timesheets, mark assignments for cost capitalization, and track assignment hours spent resolving issues and investigating scope changes. New hotspots provide direct linking from assignments to profiles and related documents for both Notes and Web users.

**Note and Journal features.** The new "Note" actions allow you to easily direct project, assignment, issue, scope, etc., related comments to the relevant people. The new journal feature creates a personal page for collecting document links and your observations.

**Direct integration with Project Observatory.** Selected Observatory reports, graphs and briefings are now directly accessible from Gateway profile documents. The Observatory connection software is built-in.

**Enterprise Timeportal.** The Project Gateway Enterprise Timeportal option allows one timesheet to be submitted for work in multiple repositories. Participants can be selectively configured for local or portal operation. These allow you to create repositories for individual projects or departments where desired but still have a simple, single weekly timesheet process for everyone.

**Easier Administration.** Administrators can now rename a participant or project with a single action. Administrators can now run a variety of agents on demand. Administrators no longer need to update the workload views every year. The new Agent Status Report shows the operational status of the all the system agents.

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## The Project Repository... a place for everything

Project Gateway is a system for building and maintaining project repositories using Lotus Notes and Lotus Domino Internet technology. It consists of a central database of active project work called Repository Center and a set of supporting databases for Metrics, Costing, Request Management and Archiving.

A project repository is a total information center for your project community. It is a place where project schedule information is published, where issues are raised and resolved, where scope changes are proposed and approved, where discussions are held, and where project deliverables are maintained. It is the place to find and to report on specific task assignments across all projects; a place to find the latest schedule charts and projections of future workload; a place with links to multimedia reference and training materials; even a place to find the latest news for the project team.

With Project Gateway, you can create projects within the project repository. You can also publish projects scheduled with the leading project management applications. The repository provides your implementation and management teams with up to date information that can be accessed from everywhere with Notes clients or Internet browsers. Convenient views called "Dashboards" provide project, deliverable, workrequest and costing status at a glance.

While project schedules deal primarily with work assignments, the repository provides a total environment for creating and tracking project deliverables, issue management, discussions and team communication.

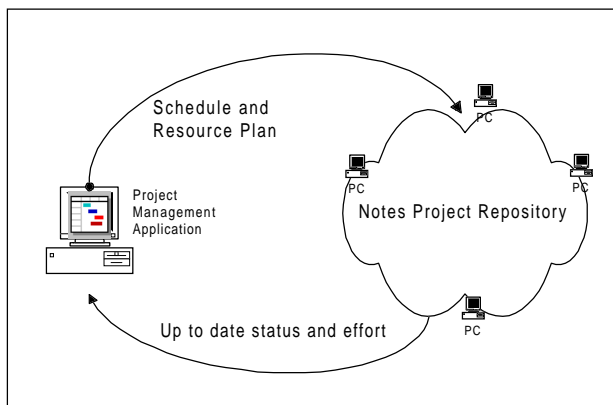
The repository actively creates and summarizes information to give individuals and managers insight into problems and outcomes. It proactively alerts people to schedule problems. It captures time spent with a complete timesheet facility and a direct status reporting capability. The repository generates individual and departmental forecasts of workload for future periods. Its graphics agents prepare Gantt charts automatically for projects, programs, departments, and individuals. Other agents track schedule commitments, interproject dependencies, the availability of project deliverables and the resolution of open issues.

## Project Schedule Integration

No matter what planning system is used, the ultimate output is a set of work assignments. Project Gateway publishes these work assignments as documents in the repository.

Project Gateway 5.1 provides full support for Microsoft Project 2000.

As the work of the project progresses, project participants are expected to update these with the status of their work. Project managers will use this status information to update their project schedules. They will publish schedule revisions when necessary. The cycle of progress reporting and schedule revision will continue throughout the life of the project.



## Documentation

The Project Gateway 5 documentation set consists of three volumes. This documentation is also available in PDF format on our web site.

### System & Administration Manual

This covers the setup of databases on the Domino server, the activation and function of agents, database administration and security, and timesheet administration.

### Repository User's Manual

This covers the use of the Repository Center and supporting databases for both Notes and Web users. All database views and documents are described including dashboards, deliverables, document management, creating new projects and assignments in the database, timesheets, and automated notifications.

### Project Manager's Manual

This covers the use of the Notes and Web based client tools used to publish project plans into a Project Gateway Repository. It explains procedures and options available for preparing project files, publishing and synchronization.

