Publishing Projects

Overview

The instructions found in this and the following three chapters are for the direct use of the Project Gateway Tools from the Notes command menus.

Users of Microsoft Project have a much more convenient method for publishing and synchronization and do not normally use the Notes command menu tools described in this chapter.

Therefore, if you are using MS Project, please read the instructions in the chapters provided.

Create Project In Notes Database Menu Command

The **Create Project In Notes Database** command will put your project plan into an existing Project Repository or create a new repository from a Project Gateway Prototype database design.

The second function (making new databases) is almost never used anymore because the database designs have become so elaborate that it makes more sense to install them on the server before publishing the first project. Nonetheless, the "make new database" function is retained in the software and documented in this chapter.

Once the Repository Center database has been created, you can add projects to it using the Create Project In Notes Database **-** Existing command that displays the Add Project To Database dialog.

Microsoft Project users can add new projects to the Repository from within the Microsoft Project application. See the instructions in the chapters entitled "Using Microsoft Project" and "Using Microsoft Project 2000."

Project Planning Guidelines

Keep your plans as simple and understandable as possible. Resist the temptation to turn a small project into thousands of steps. Each task that you publish requires action on the part of the participant to report status and measure time spent. People generally resist being micromanaged, so it's best to consolidate work into a small number of substantial tasks that have clearly defined objectives. Many project managers feel that a planning process that defines one to three tasks per week per person is effective for control without being burdensome to the team.

Definitions

The Repository Administration "Field Map" Document

A “FieldMap” document, which is part of the Repository Center database, defines the relationship between the field names used in Notes with the information in the Project plan. It also provides the default settings for the project and participant profile forms and a variety of options that can affect the publishing process.

Prototype Database

In the very unlikely event that you need to create a new database using the tools, rather than adding your project to an existing repository, you will require a prototype database design. The prototype database is the "Repository" database design file that is discussed in the System administration manual.

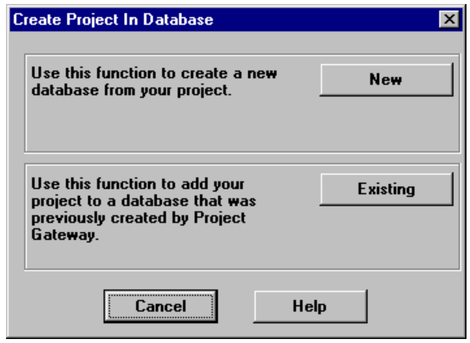
Taskhelp Databases

Project Gateway has the ability to connect the assignment documents it generates with a separate database of organizational expertise and methodology. This separate database is called a "Taskhelp" database. The connections are made in the form of "doclinks" added to each assignment document. The topic to which the note is linked is selected based upon information found in the project plan. This process is described in a later chapter.

Create Project In Database

The **Create Project In Database** menu function is used to publish project management plans into a Repository Center database. It can be used to create a new repository or to add a project to an existing repository. New repositories are created by copying a "prototype" database that is provided with your Project Gateway system. In most installations, however, the repository will already be set up for you by your system administrator.

From the Notes Action Menu select "**Create Project In Database**" to display the following dialog:

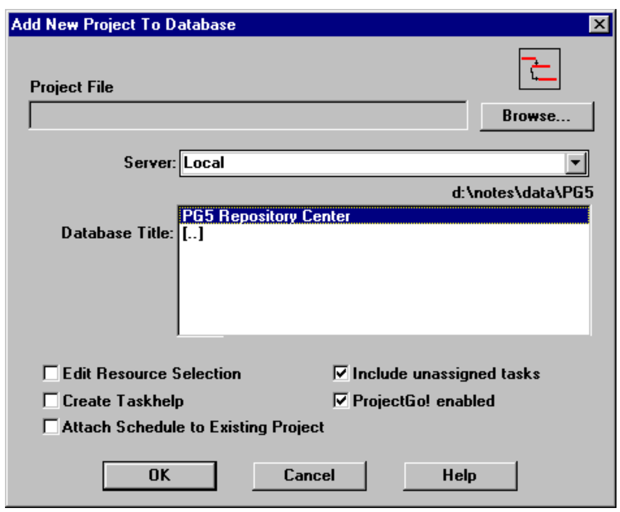


Select **Existing** to add another project to an existing project repository database or **New** to create a new database.

Adding a Project To an Existing Database

The "**Add New Project To Database**" dialog appears when you select the "**Existing**" button on the **Create Project In Notes Database** dialog. It requires you to select a project file and an existing database. When you press OK it will add the new project to the selected database creating assignment, project profile, and participant documents as required.

Note: Microsoft Project users will probably prefer to use the ProjectGateway AddProject function directly from within their Microsoft Project application. See the chapter "Using Microsoft Project" for instructions.



Selecting A Project File

Since the project that you are importing must already exist, you select the file by pressing the Browse button. This will display a Select File dialog. The directory and filter setting will be recalled from the previous time you selected a project for any Project Gateway function.

Microsoft Project 2000 users should be using the toolbar function to publish plans. In order to create the .M2K format file required for this command, you must first use the toolbar function "Save as M2K" which is found under the File Operations "disk" icon.

The format of the file, as specified by the file extension, must be one of the following:

- Microsoft Project 2000 and later **.M2K**
- Microsoft Project 4, 98 **.MPX**
- ABT Project Workbench **.FIX**
- Primavera/SureTrak **????ACT.P3**
- Charts Now! **.SCH**
- Welcom Open Plan **.OPP**

When you OK the file selection, the file name appears in the dialog. Above the file name is displayed the file format, the date of the file and its size. **You should look at this information to be sure you have selected the correct revision of your project plan.** One common mistake is to be running the project management system when you use this command. If you have not saved, your most recent changes (and most up to date schedule) will not be used! So check the date and time before you proceed.

Note: A demonstration file, "SamplePG.MPX" is included with the Project Gateway Software.

Note: Primavera stores projects as a set of files. The first four characters of each file name is the project name, the remaining characters designate which kind of data is stored in the file. Project Gateway uses the ????ACT.P3 file filter to show you a list of just one of the files for each project. When you select it, Project Gateway will access the other files as necessary. Please see the chapter "Using Primavera" for additional information on preparing Primavera files for use with Project Gateway before proceeding.

Options Settings

There are four checkboxes on this dialog. If you are a new user you will probably want to leave them in their default state.

Edit Resource Selection

If this is checked, you will see the Select and Rename Resource Dialog during the import process. If it is not checked, the software will automatically create assignment notes for all the assignments that have been made to your "working" resources in your project plan.

Create Taskhelp

If this is checked, you will see the "Create Taskhelp Doclinks" dialog later in the process. However, this will be of no use unless you have previously constructed a separate database of Taskhelp as discussed in Appendix E.

Include Unassigned

If this is checked, those tasks not assigned to any resource in the project plan will be included in the project database as assignments to the resource named "[unassigned]."

This feature is prechecked because it is very useful when a plan is not fully resourced. Other than the distinctive name, these become normal assignments in the project database.

Enable ProjectGo!

When checked, this will set the “Allow ProjectGo! Notifications” field in the Project Profile document to “Yes.” This field in turn is a master switch that will allow or prevent the operation of the ProjectGo system. This is discussed in the Using ProjectGo! chapter.

Attach Schedule to Existing Project

This feature allows you to provide a project plan for a Project Profile that already exists in the selected Repository. Such a situation arises frequently when a project is initiated in the Repository before a detailed work schedule has been prepared. Schedules cannot be attached to projects that already have external schedules, only to those created in the database.

When this option is selected, the system will prompt you to select the name of the existing project from a list of manually created project profiles. This prompt will occur after the "Add Database" dialog OK button is pressed.

Processing

When you have completed selecting your project file and database name, and made any necessary adjustments using the Advanced Options and Create Custom Fields dialogs, you are ready to begin the process of creating a Notes Database from your project.

To begin processing, press OK.

Sequence of Processing

1. The project management file (or database) is read and a CPF (Common Project Format) model is constructed that contains the project information in a vendor independent format. For some project types, a helper application, "Project Gateway Transfer" is invoked by Project Gateway to perform the actual data transfer. It will appear briefly at the bottom of the screen on the Windows It will disappear when the project information has been read.
2. The project name, derived from the project plan, is compared with the names of all projects already found in the database. If this name is already in use, a dialog appears which requires you to provide a unique name for this project.
3. If the projects in the database have been assigned to "programs", a dialog will appear showing the list of existing programs and allowing you to select which program you want this new project be a part of. You do not need to select a program. If you select or enter a program name beginning with the character [, the project will be considered to be "for approval" and the assignments in the project will not be displayed in the normal Assignment views.
4. The project is scanned and all those assignments made to the selected resources are marked for inclusion in the new database. (When Edit Resource Selection is specified, a dialog appears as explained later in this chapter.)
5. If Create Taskhelp is selected, a dialog will appear to allow you to select the Taskhelp database and keywords.
6. If creating a new database, a dialog appears to set the database title. The proposed title is defaulted from the title of the project plan. After entering the desired title, press OK. At this point Project Gateway makes a copy of the prototype and the copy is renamed as the new project database.
7. For each participant named in an Assignment document, a Participant Profile document is created if one does not already exist and if you are allowed to do so. The default values for the Participant Agent Profile are set from those found in the Field

Map. For each new participant document created, one or more chart definition documents will be created from the templates found in the database. ***Note: A database security option may prohibit you from automatically creating new participants. If this occurs you will get a message box indicating the resource names that are causing the problem. In most cases the problem is simply a difference in spelling between the name in the Repository and that shown in your project plan.***

8. If a TimeFilter is specified in the [current] section of the Marinpmg.ini file, a prompt will appear asking you whether to publish only those assignments that start before the filter.
9. For each selected assignment in the project, a new assignment document is constructed. Fields are created within each assignment document for the project information (according to the Field Map) and the selected project text, dates, costs, and other values are inserted. When all of the assignment notes for a particular task have been constructed, doclinks are made between the assignments. At this time, Taskhelp doclinks are created.
10. Doclinks are created between the assignment documents of the project according to the predecessor and successor dependency relationships defined in the project management plan.
11. If creating a new database, the Field Map document is updated. This contains the table of relationships between the field names used in the assignment documents and the information stored in the project model. It also contains the period settings for time recording and the default setting for ProjectGo Agents.
12. The Project Profile document is written and the CPF file, created earlier in the process is attached to this document. The default values for the Management Agent Profile are set from those found in the Field Map. New project chart definitions are created for each project chart template found in the database. A news item is generated for the project publishing event.
13. Finally the database is closed and the completion dialog is displayed.

What to do after a new project is published

When publishing is complete, a dialog will appear. Use the Database Open command from the Notes menu to open the new database on your desktop.

Select the "Projects" item to display the project dashboard and open the Project Profile of the new project. Update this document will all appropriate settings including the proper userID, email addresses, dashboard targets, policy and agent options. The UserID of this new project profile will contain your current UserID, as will all other documents that you have just created. You may wish to add other UserID's to this list to allow other people to have access rights to the documents for this project.

Any new Participant Profiles that have been created must be manually edited to contain the correct UserID for each participant as well as the appropriate timesheet and agent settings. These new participants contain your UserID so that you can access them. Once you have entered the participants UserID and saved the profile, you will not be able to access it again (unless you are a person with the [PGADMIN] role defined in the access control list).

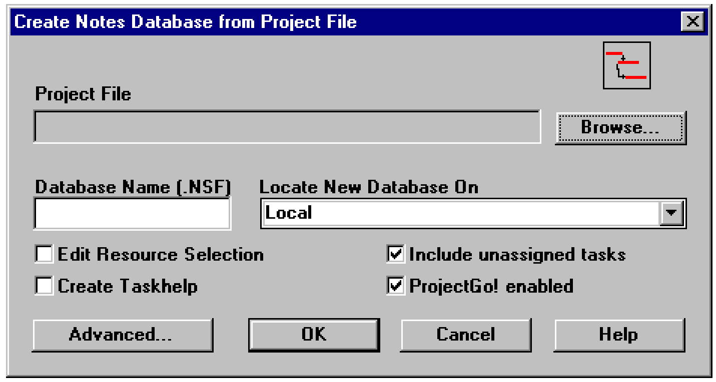
After changes to the UserID's have been made, you should run the Admin\Update Organization agent to update all of the project assignments with the correct participant UserID's. If this is not done, your participants will not be able to edit the assignment documents or submit timesheets.

A nightly agent will update the UserID's automatically if the database is on a server and the agent is enabled.

Note: If a new server database has been created, then additional setup will be required for access control and agent initiation. See the system administration manual.

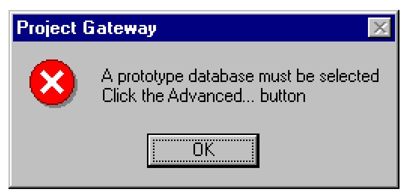
Creating a New Repository

The Create Notes Database Dialog



Select a project, then specify the name and location where the new database is to be placed. Set options and press OK. This will initiate the publishing process that will be accompanied with a visual progress bar.

Note: When you press "OK" for the first time, you may see the following prompt



In this case, OK the message then press the Advanced Options button, select the prototype database as described below, OK the advanced options dialog and then OK this Create Database dialog.

Once you have successfully published a project, the system will remember the name and location of the prototype database so you will not see this warning message.

Selecting A Project File

Select the project file by pressing the Browse button. This will display a Select File dialog. The directory and filter setting will be recalled from the previous time you selected a project for any Project Gateway function.

The format of the file, as specified by the file extension, must be one of the following:

- Microsoft Project .M2K for Project 2000 and later***

- Microsoft Project .MPX**
- Primavera/SureTrak ????ACT.P3
- ABT Project Workbench .FIX
- Welcom Open Plan .OPP

When you OK the file selection, the file name appears in the dialog. Above the file name is displayed the file format, the date of the file and its size. **You should look at this information to be sure you have selected the correct revision of your project plan.** One common mistake is to be running the project management system when you use this command. If you have not saved, your most recent changes (and most up to date schedule) will not be used! So check the date and time before you proceed.

****Note:** Use the Microsoft Project "ProjectGatewaySave" macro to prepare this file.

***Note: To create .m2k files, you must use the Project Gateway macros. See the chapter entitled "Using Microsoft Project 2000".

Note: Primavera stores projects as a set of files. The first four characters of each file name is the project name, the remaining characters designate which kind of data is stored in the file. Project Gateway uses the ????ACT.P3 file filter to show you a list of just one of the files for each project. When you select it, Project Gateway will access the other files as necessary. Please see the chapter "Using Primavera" for important installation and preparation steps required before publishing your first project before proceeding.

Naming the Notes Database

When you create a new database, you must give it a unique file name to which the Notes data file extension (.NSF) will be appended. When you select the project file, the software automatically copies the project file name to be the proposed Notes Database name. When you press OK, the software will check to see if a database file of this name already exists. If it does you will see an error message. Edit the Database Name field before proceeding.

Note: To create the database in a subdirectory of the selected server, enter the relative directory path ahead of the file name. For example, to create the database SAMPLE.NSF in the directory VAR you would enter VAR\SAMPLE.NSF in the database name field If the subdirectory does not currently exist, it will be created for you.

Note: If your server name does not appear in the dropdown list, you may enter it manually in the Server field.

Options Settings

There are four checkboxes on this dialog. If you are a new user you will probably want to leave them in their default state.

Edit Resource Selection

If this is checked, you will see the Select and Rename Resource Dialog during the import process. If it is not checked, the software will automatically create assignment notes for all the assignments that have been made to your "working" resources in your project plan.

Create Taskhelp

If this is checked, you will see the "Create Taskhelp Doclinks" dialog later in the process. However, this will be of no use unless you have previously constructed a separate database of Taskhelp as discussed in Appendix E.

Include Unassigned

If this is checked, those tasks not assigned to any resource in the project plan will be included in the project database as assignments to the resource named "[unassigned]."

This feature is prechecked because it is very useful when a plan is not fully resourced. Other than the distinctive name, these become normal assignments in the project database.

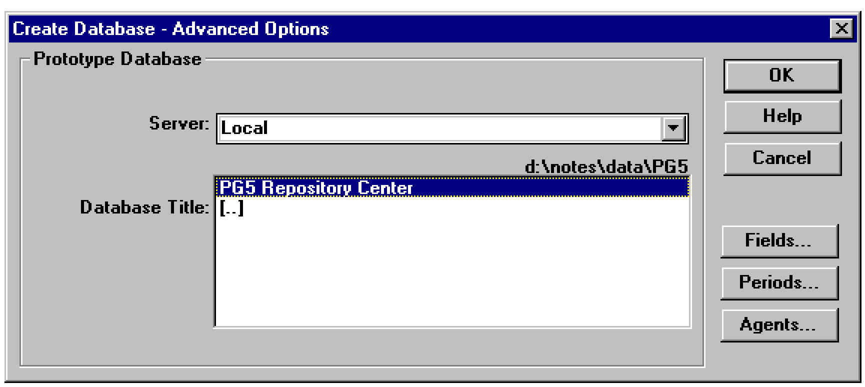
Enable ProjectGo!

When checked, this will set the “Allow ProjectGo Notifications” field in the Project Profile document to “Yes.” This field is a master switch that will allow or prevent the operation of the ProjectGo! Assignment Tracking system for this project. When creating a new database, additional setup is required. This is discussed in the Using ProjectGo! chapter.

Advanced Options

The Advanced options button allows you to specify the prototype database and to define certain advanced modifications to be made to the prototype when the new database is constructed.

Pressing this key displays the Advanced Options Dialog Box.



Note: If the previously used prototype database can be found, then the dialog will be displayed with that database selected. If it is located on a server to which you are not currently connected, you will be asked for your password before the dialog is displayed.

If the system does not have a recorded prototype name, or if that prototype is not accessible then a warning message will appear. This is only a reminder that you must select a prototype.

Note: If your server name does not appear in the dropdown list, you may enter it manually in the Server field.

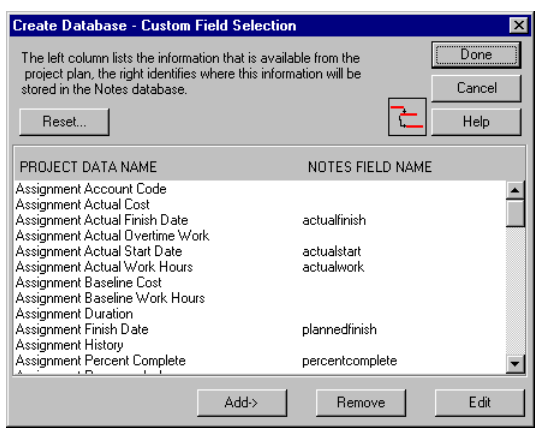
It is very important that you select a prototype database designed for use with Project Gateway! Otherwise, the create command will not be able to complete its function

Advanced Options - Fields, Periods & Agents

The modifications supported by these functions are designed for users who are already very familiar with the system. If you are new to Project Gateway, do not use the Fields, Periods, or Agents functions.

Advanced Options - Fields

The *Fields* button will display the Create Database **-** Custom Field Selection Dialog. This dialog allows you to specify how information in your project management application is made available in the documents of your new Notes database.



This is an advanced feature that you will probably not want to adjust until you have had some experience with Project Gateway and unless you have a good understanding of the operation of the project management application.

This dialog allows you to review and edit the information shown in the table. The left column lists the specific piece of project information i.e., Assignment Actual Finish Date. The column on the right shows the name of the field in the assignment document where this information will be placed. The entries in the left column correspond to data in the project plan according to the tables found in the chapter for that system.

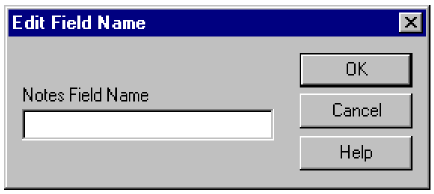
The initial contents of this table are derived from the field map found in the selected prototype database.

The field names are used in the formulas for the forms and views. Unless you are completely replacing the prototype supplied with Project Gateway, you should not change the predefined field relationships. You can, however, freely create additional fields. When the database is being created, all the specified fields will be created in each assignment note.

The result of this dialog will be itself permanently stored in the database as the "Field Map" document and can be found using the All Documents in Database View. The Field Map is used whenever project models are created or updated.

Dialog Controls

- *Done* will save the resultant table as the Field Map for the new database.
- *Cancel* will exit the dialog without saving any of the changes that have been made.
- *Remove* will delete the Notes field from the table. Note: Do not remove or refine any of the predefined field entries provided in the Repository Center prototype. They are required for the proper operation of the Repository Center database.
- *Add Field* and *Edit Field* will display the Edit Field Name dialog which allows you to enter a new Notes field name.



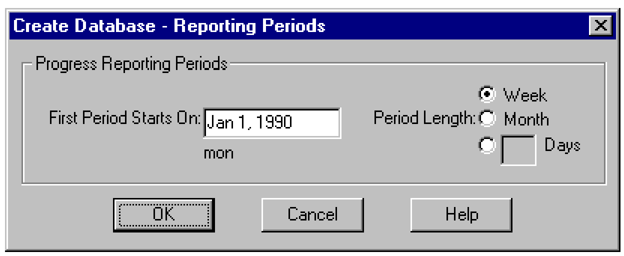
It is your responsibility to ensure that this new field name is unique and to add it to the appropriate forms and views after the database is created.

Advanced Options - Custom Periods

The *Periods* button on the Advanced Options dialog displays the Reporting Periods dialog. This sets the intervals in which work hours and progress are recorded for each assignment in the progress history section of the assignment form. The default is report by weeks beginning on Mondays in the prototype database. Unless you need something different, you do not need to use this function.

If you want to change your workweek to start on a day other than Monday, then move the starting date forward or backward by the minimum amount. For example, if your week must start on Sunday then change the database start to December 31, 1989. Or if you need a Tuesday workweek start, use Jan 2, 1990. This will minimize the impact on other parts of the database. The period start is used to define the first day of the timesheet and the "period number" used in tabulating work by period data in assignment documents. Those period numbers are then used to defined the columns of the Time Summary views. If you change the effective period numbers by changing the start date of the database, you invalidate all the standard Time Summary views.

Since these period numbers are simply integer week numbers, there is really no practical advantage in changing them to a different base date.



The default starting date is defaulted to January 1, 1990 which is, conveniently, a Monday and also the first of the month.

Note: If you use the Timesheet system, you must use seven day periods.

To set your reporting periods to begin on someday of the week other than Monday, change the first period date field. The day of the week is shown in the dialog box.

The monthly and special period settings are retained for compatibility with previous versions of Project Gateway, but their use is discouraged since these setting are incompatible with the Timesheet subsystem.

Advanced Options - Agents

The Agents button is used to preset the Project Profiles and Participant Profiles for each new project or participant created in the database. The initial settings are inherited from the field map document of the prototype database. This function allows you to override these defaults at the time of database creation. It displays a dialog letting you select either the Management or Participant agent settings. Selecting one of these displays another dialog containing the current defaults. You may edit these default setting. When done, OK the dialogs.

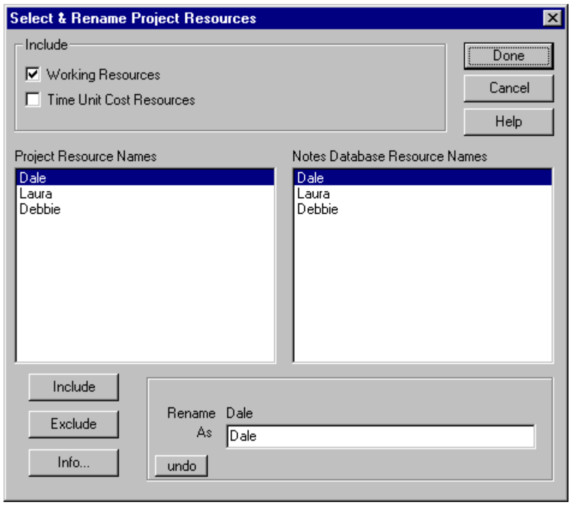
Edit Resource Selection Option

Select and Rename Resource Dialog

If the Edit Resource Selection checkbox is checked, this dialog appears after the project management file has been read, but before the new Notes database is constructed.

This option allows you to select which resources in the project will have assignment documents in the project database. The default is that all of the people in your project will be included in your project database. If you do not understand this dialog and just want to continue creating your project database, press Done.

This dialog can also be used to rename the resources so that the names shown in the project database are different from those used in the project plan.



The left column shows the names of the resources found in the project plan, the right column shows the name that will appear in the project database. By clicking on a resource in the left column you will see the cursor highlight the corresponding resource in the right column. Initially these columns will be the same.

When you are finished inspecting or making changes, press *Done* and a confirmation dialog will appear. Approve this confirmation and the Create Database process will continue. If you cancel the confirmation dialog, you can continue to make changes.

If you *Cancel* the main dialog, the Create Database process will be canceled.

Selecting Classes of Resources

At the top of the dialog are check boxes for the possible types of resources that may exist in the project plan. Working Resources are generally the people in the project and are always checked when the dialog appears. Time Unit resources are generally the machinery used in the project.

When the check box is checked, all of the resources of that class will be added to the left and right hand lists. When unchecked, those resources will be removed from both lists as a group. The next section describes how to select resources individually.

Including and excluding specific resources

The *Include* and *Exclude* buttons will change the contents of the right column. To exclude a particular resource, click on that resource in the right column and click on the Exclude button. The resource will disappear from the right column (but will still appear in the left column). To reverse the process, click on the resource in the left column and press Include. The resource will reappear in the right hand column.

Renaming Resources.

Sometimes in a project model, you may have used skill descriptions (e.g., Writer) or initials for planning purposes. Since the project database will be used by real people in your organization, you might want to show the real person's name in each assignment. You can do this using the following procedure.

1. Click on the resource name in the left table.
2. Click on the Rename edit box and enter the new name in the lower right hand corner.
3. Click on some other resource on the left side. This will cause the new resource name to appear in the right hand column.

Getting Information about specific resources

Select a resource in the left column and press the *Info* button. This will display the Resource Information dialog. This shows the number of assignments (and hence the number of assignment documents that will be created) and the date range planned for these assignments. Press OK to continue.