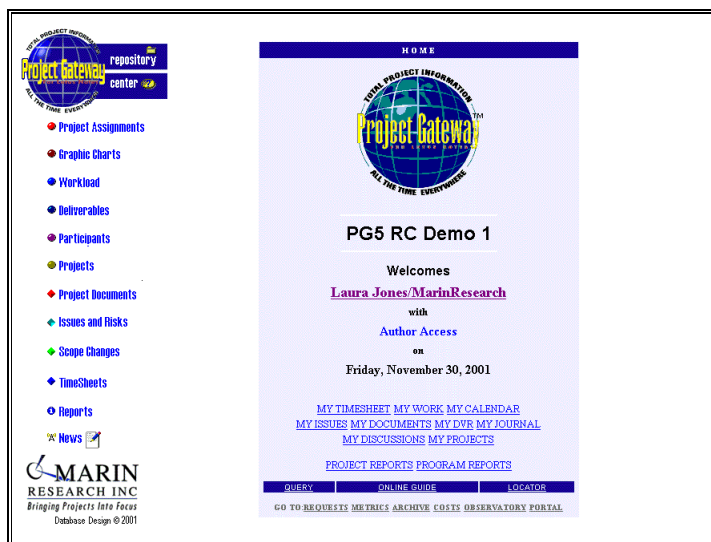


# Using the Repository with a Web Browser

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## Repository Center



Repository Center is the home page of the Project Gateway system. It is organized into two areas, the left side Navigator panel and the center Home panel.

The Project Gateway system can be accessed from both Notes and Web Browser clients. This section discusses the unique aspects of the system when it is used with a Web Browser. Please note that the appearance of a page is dependent upon the choice of platform, browser settings and your local system settings. Web based timesheets are discussed in their own chapter.

### Repository Center Navigator Panel

The left hand side provides access to all the groups of information in the repository. Each item opens another level of navigator to provide you with access to the views and creation actions associated with that subject.

The Repository Center Navigator acts as an index to the information stored within the database. The index topics are listed down the left side. Clicking any of them will display another navigator with a collection of views and creation actions for that topic. These topics are described in the previous chapter so we will not repeat the list.

## **Repository Center Home Panel**

The home panel, which can contain a site selected graphic at the top, provides both information and convenient access to repository reports and functions.

### ***Username***

This displays your userid name and is linked to open the "My Responsibilities" page. That page displays links to every profile for which your userid is the first named manager id.

### ***Access information***

This shows your level of database authority (normally this will read "Author") and any additional Roles that you may be assigned. Only a few people should have the roles of [PGADMIN] and very few if any people should see [PGMASTER].

### ***Personalized Action Links***

This collection of links generate results that are keyed to your userid, so they will not give the exact same results for anyone else.

### ***My Timesheet***

This will first determine which participant you are. If there is more than one candidate, it will present you with a selection page. Then it will open your existing unfinished timesheet (if you have one) or create a new timesheet for you for the current week. If your current week timesheet is complete, it will offer you the opportunity to begin next week's timesheet.

### ***My Work***

This will first determine which participant you are. If there is more than one candidate, it will present you with a selection page. Then it will produce a table of project commitments and a list of your current task assignments.

### ***My Calendar***

This will first determine which participant you are. If there is more than one candidate, it will present you with a selection page. Then it will generate a calendar "todo" report for the current month. This will show items associated with your participant name (assignments and holidays and project events) and items associated with your user name (issues, scope changes, etc.)

### ***My Issues***

This will create a report showing all issues and risks for which you are the author or are assigned. At the bottom of this report is a control

panel that provides hundreds of variations of the report and spreadsheet export.

#### ***My Documents***

This will create a report showing all of the project documents that you have authored.

#### ***My DVR (Deliverables)***

This will create a report showing all of the deliverables that are owned by you.

#### ***My Journal***

This will open your Journal, a personal document for your notetaking.

#### ***My Discussions***

This will create a report showing discussions that you have initiated (by authoring the topic and discussion topics you have previously marked as favorites. It also shows all discussions initiated within the past 10 days.

#### ***My Projects***

This will create a table showing the dashboard performance of all of the projects (if any) for which you are listed as the first manager.

### ***General Reporting Action Links***

#### ***Project Reports***

This will open a selection form that allows you to pick any repository project and one of a long list of available reports and views about that project.

#### ***Program Reports***

This will open a selection form that allows you to pick any repository program and one of a long list of available reports and views about that program.

### ***System Wide Functions***

#### ***Query***

This begins the general query process we call "Ask Project Gateway". This is a very easy way to find out the most important work information about a project, participant, program or organization.

#### ***Online Guide***

The Online Guide leads to a section of instructions for using the repository to perform a variety of common tasks.

#### ***Locator***

The Repository Locator icon leads to your personal locator page that provides custom searches and hotlinks to those documents you have marked as favorites. This feature is discussed in a later part of this chapter.

## GO TO Links

This section will provide links to all of the other Marin Research, Inc. databases that you have deployed.

The information for this display comes from the Repository Suite setup section of the Repository Administration form. See the Project Gateway Administration Manual (chapter - "Configuring the New Repository") if these links are missing or do not open the correct databases.

### Links will be provided or some or all of the following

- REQUESTS - The Project Gateway Request Center database.
- METRICS - The Project Gateway Metrics Center database.
- COSTS - The Project Gateway Costing Center database.
- ARCHIVE - The Project Gateway Repository Archive database.
- OBSERVATORY - The Project Observatory database.
- PORTAL - The Project Gateway Enterprise Time Portal database.

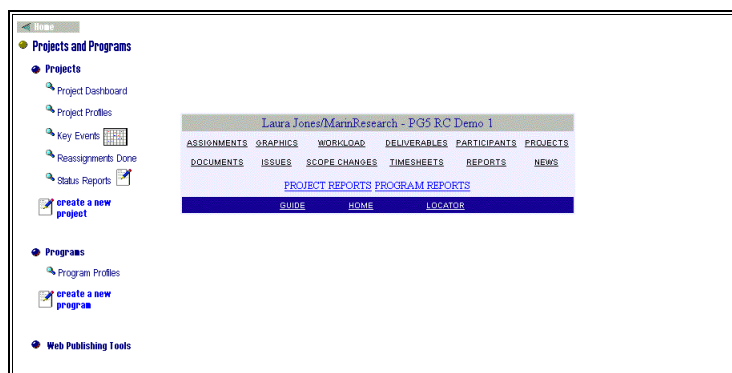
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## Finding your way

Starting from Repository Center, you can jump directly to other sections of the database by clicking on one of the navigator buttons for Project Assignments, Graphic Charts, etc. These will take you to that Navigator page. From these pages you have the ability to display views and to create specific kinds of items.

## Navigators

Navigator panels provide access to views of data and with actions to create new documents such as new projects, issues, and assignments.



*The Projects and Programs Navigator Page*

***Views are designated by the magnifying glass icon.***

***Buttons to create new documents are designated by the pencil on paper icon.***

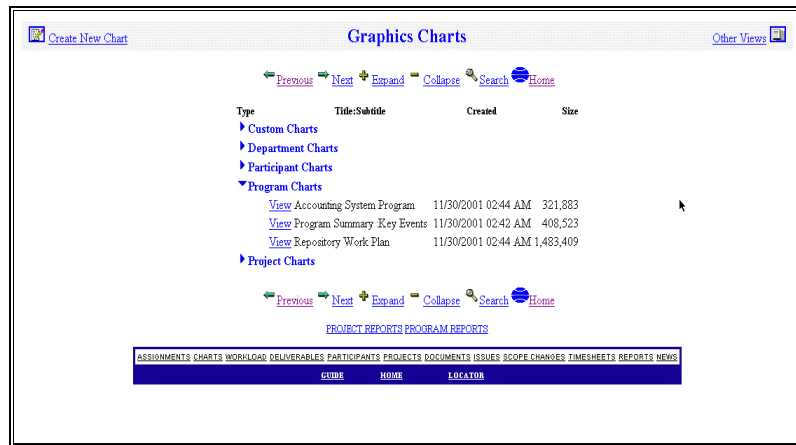
All navigators have a link to Repository Center shown as "Home" at the upper left corner of the screen.

In the center of each Navigator page is panel providing a direct link to the other navigators, and to the Query, Locator, Home, Project and Program Reports functions. Thus you do not need to go "home" to go from one subject area to another.

## Views

Views are tables listing documents, usually grouped by category headings. If no documents of this kind exist, the view is said to be empty. As the database grows, the views show more and more documents.

When a view is displayed you will see a screen something like the following:



### View Heading

The heading band on each view displays the title of the view in the center, a link to the appropriate navigator panel on the right, and, for most views, a link on the left to create a document of the type shown in the view. So if you open any of the Issues view, you will have a link to create a new issue.

Just above and below the view body is a row of icons to change pages or initiate a search.

### View Body

The body is the information of the view. It consists of one or more rows, some preceded with triangular "twistie" arrow heads. Clicking on these arrowheads will expand that heading to show the underlying detail documents or additional levels of headings.

Each detail row will contain at least one column that is highlighted as a link. Clicking on this item will open the selected document. If you are not modifying the document, you can return to the view page by clicking the "Back" button on your browser tool bar.

Sometimes you want to open new windows for the document pages so that you can keep several open at one time. If you are browsing in Windows, click the right mouse button instead of the left one and the select "Open in New window". If you are using a one button mouse on a Mac, put the cursor on the link, press the mouse button, drag the mouse downward a short distance until the secondary menu appears, and click "Open Link in New Window".

### View Footing

At the bottom of each view is displayed another wide panel that links to all of the Repository navigators as well as the home page, locator, guide, project and program report selectors.

Experienced users find that these "transit points" are the most efficient way to move around the Repository.

## Documents

There are many different types of documents in the Project Gateway system such as Issues, Risks, Project Profiles, etc.

Documents are displayed when clicked from a view, or from a hotlink in another document.

Documents generally have action links at the top of the form and some of the format will display links in the body of the document as well. For example, the following shows an assignment document.

Assignment Assigns Projects Participants Home

Implement server software updates

assigned to: [Davidson James](#) project: [A Deployment Plan](#)

<b>scheduled</b>	start: 12/04/2001 09:00 AM	finish: 12/05/2001 05:00 PM	effort: 8.00
<b>actual</b>	start:	finish:	effort:
	<b>work remaining</b> 8.00 hours		status: Future
	<b>percent complete</b> 0%		

**depends on**  **required before**

**key event:** Automatic

Note to project plan:

**comments:**

- ▶ Task Information
- ▶ History
- ▶ Document Tracking
- ▶ Access Control

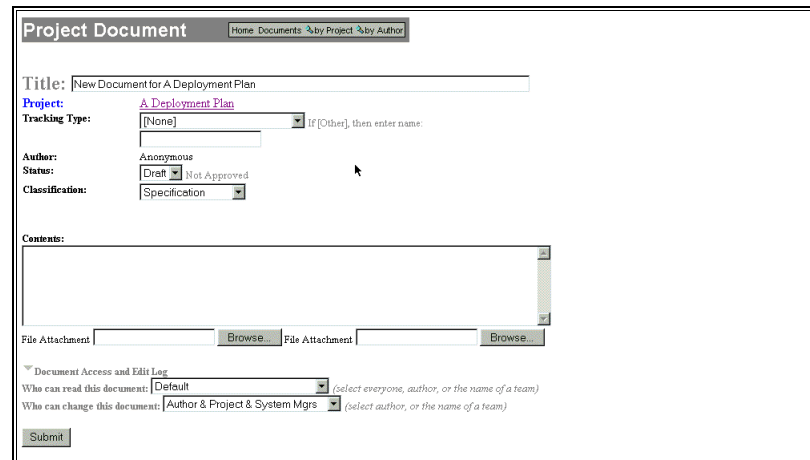
On top are *Action Buttons* for displaying the Previous and Next document from the originating view, and many other actions.

Most documents contain one or more hyperlinked fields such as project names. Clicking on any of these fields will open the referenced document.

Documents can be wider and taller than the display screen. Make sure to scroll your browser to see the entire content. Most browsers can print web pages with reasonable fidelity.

## Editing Documents

When the Edit action is selected, the document is redisplayed so that you can enter new information. These data entry fields are either list boxes that contain a set of choices or open fields (holes might be a better description) when text, numbers or dates are to be entered. The fonts used for data entry are defined by your browser and local operating system, not by the application, so that the forms will look different from one system to the next.



The screenshot shows a web form titled "Project Document" with a breadcrumb trail: "Home Documents > by Project > by Author". The form contains the following fields:

- Title:** A text input field containing "New Document for A Deployment Plan".
- Project:** A link labeled "A Deployment Plan".
- Tracking Type:** A dropdown menu with "[None]" selected. A note says "If [Other], then enter name:".
- Author:** A dropdown menu with "Anonymous" selected.
- Status:** A dropdown menu with "Draft" selected. "Not Approved" is also visible.
- Classification:** A dropdown menu with "Specification" selected.
- Contents:** A large text area with a vertical scrollbar.
- File Attachment:** Two "Browse" buttons for attaching files.
- Permissions:** Two dropdown menus. The first is "Who can read this document:" with "Default" selected. The second is "Who can change this document:" with "Author & Project & System Mgrs" selected. Both have small help text: "(select everyone, author, or the name of a team)".
- Submit:** A button at the bottom.

In most data entry fields, the field will scroll to accommodate as much text as you want to enter. In a few fields that have limits on entry size, the browser will stop accepting characters when the limit is reached.

Many documents allow you to attach files to be stored on the server. See the section below for instructions.

### **The Submit Button**

When a document is being created or opened for editing, nothing further will happen until you press the "Submit" button (sometimes labeled as "GO") located near the bottom of the page. You may have to scroll your display to make this button is visible.

When you press Submit, the new data you have entered is sent to the server.

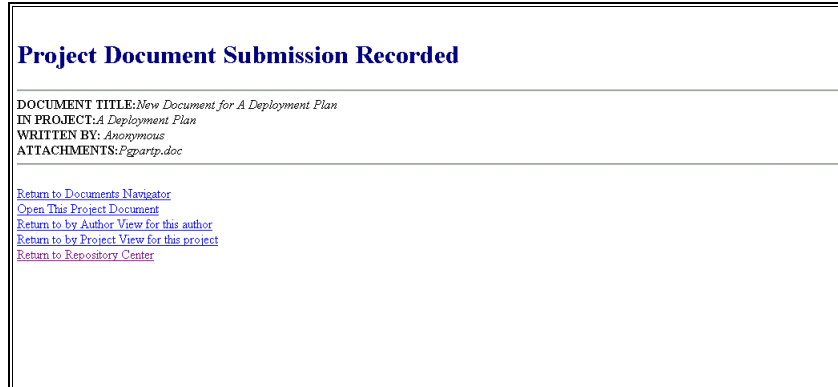
Whenever this is done, checks are made to see if you have the rights (from a security standpoint) to make changes to this document. If not, you will get an error message page from the server telling you that you cannot change the document.

Next, the data entered is evaluated against rules built into the database design to prevent certain kinds of mistakes from being entered. If a

problem is found, a page will be displayed with the error message. Generally, you can just press the back button on your browser, fix the incorrect or missing data, and press submit again.

## Response Pages

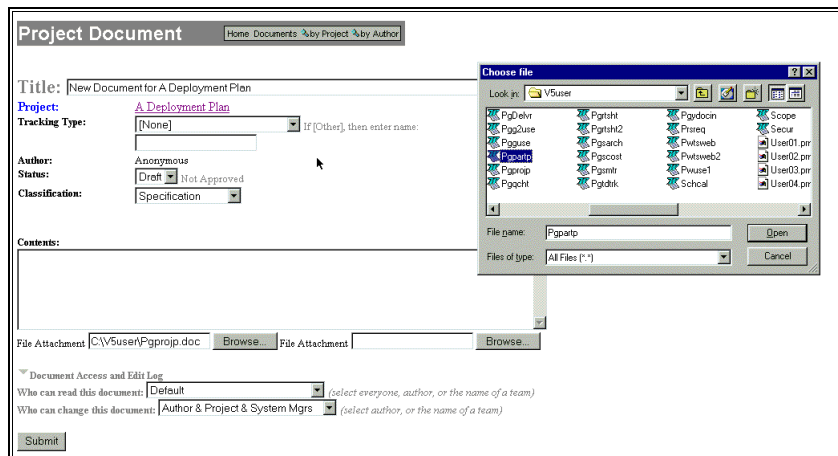
When the input has been accepted, a response page will be usually displayed such as the following.



A Response page gives you a series of links to other views, navigators and the document. You must click on one of these links to continue. When in doubt, simply choose "Repository Center."

## Adding File Attachments

Any file on your desktop system can be attached to a repository document that displays the "File Attachment" field and browse button. These special fields are included within Issues, Project Documents, Discussion, Scope Changes and other items.



To attach a file, create or edit the document, then press the browse button to display a file selection dialog in your browser. Select the file

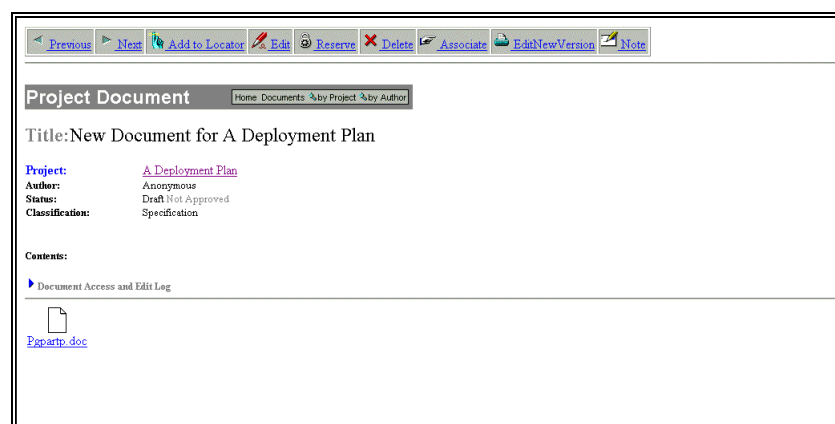
with this dialog. Once you do this, the file name will be shown in the attachment field.

When you submit the form, a copy of the file will be uploaded to the server. The existing file on your local computer is not modified by this process.

**Note:** Although the forms have only one or two file attachment buttons (depending on the form), any number of attachments can be put on a single document. Simply edit the document several times, adding the additional files one or two at a time.

### ***Retrieving an attached file***

When you display a document containing a file attachment, the attachment will be displayed with an icon and an underlined title. When you click on this, a copy of the file will be sent from the server to your local machine. The name of this local copy will not be the same as the name of the original document, but the file extension (.DOC etc.) will be the same. When you download this, the operating system on your computer will attempt to launch the associated application so that you can use the information.



Note: When editing documents retrieved from the server that were originally created (and hence are still present) on your local system, it is very easy to edit the wrong version of the file. You must pay attention to the file name and directory being used.

### ***Removing and replacing file attachments***

When a document with one or more attachments is edited, a checkbox will be displayed at the bottom of the form with a checkbox. By checking the box and submitting the document, the attachment will be deleted.

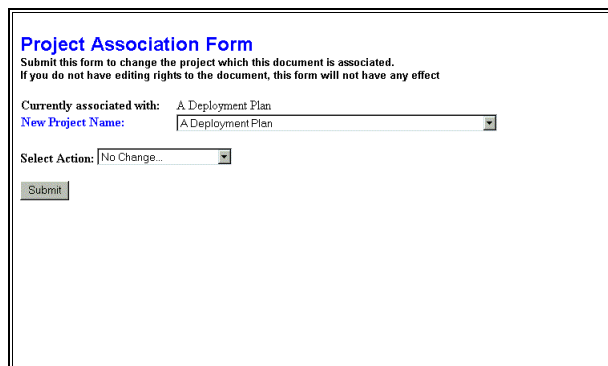
**Note:** If you want to replace an attachment with a newer copy of a file with the same name, edit the document twice. First, checkmark the existing attachment for deletion and submit it. After this is complete, reopen the document, edit it, and attach the file.

Note that Project Documents provide versioning so that older versions, with older attachments, can be retained in the database.

## Transaction Forms

Many of the actions that you select using buttons or hotspots require additional parameters for and confirmation. These are implemented using what we call "Transaction" forms. These are very simple forms that have minimal choices and a button to invoke the action.

Transaction forms are used for many functions.



The screenshot shows a web form titled "Project Association Form". Below the title is a warning: "Submit this form to change the project which this document is associated. If you do not have editing rights to the document, this form will not have any effect". The form contains three fields: "Currently associated with:" with a dropdown menu showing "A Deployment Plan"; "New Project Name:" with a dropdown menu also showing "A Deployment Plan"; and "Select Action:" with a dropdown menu showing "No Change...". A "Submit" button is located at the bottom left of the form.

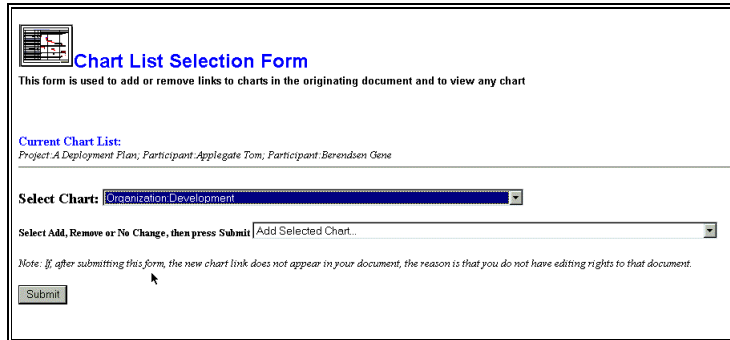
When a transaction form is displayed, no action has yet been taken. Even though you can initiate an action does not necessarily imply that you have the authority to perform it. So if you submit the transaction and nothing happens as a result, you probably do not have access rights to modify the originating document.

In general, a transaction document does not display a response page, instead, it displays the document just modified or a opens a new document form.

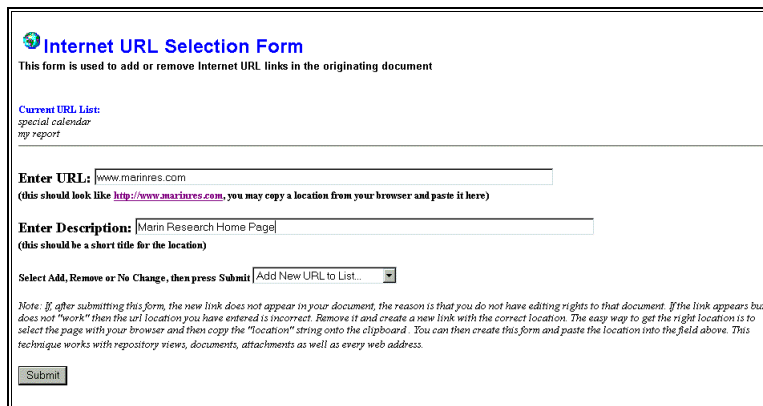
## Custom Links on Profile Documents

Project, Program, Participant and Organization profile documents have a special area to display links that you can load with your own selections using the Make a Chart Link and the Make an Internet Link functions.

For chart links, a pull down list will show all chart definitions in the database. The action list will allow you to add a new chart or remove any existing one from the profile. The existing charts will be listed in the action list. Note that you are not removing the chart itself, only the visible link to it from this profile.



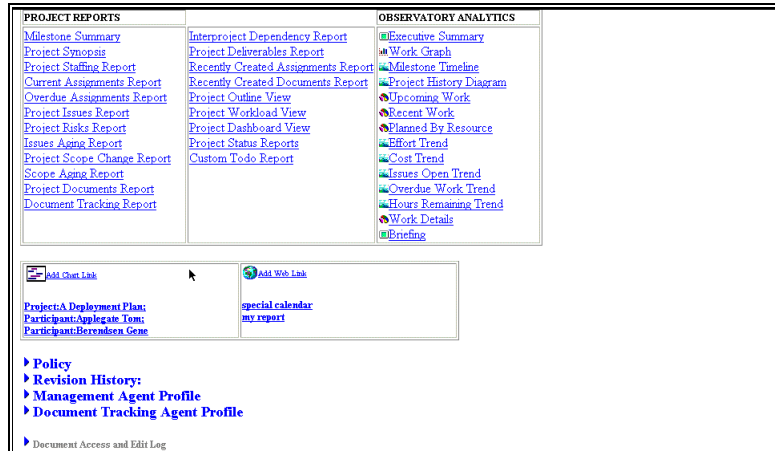
For Internet links, you put the Internet location address in one field and the name for display in another. The action list will allow you to add this new link or remove any existing one. The existing ones will be listed in the action list.



Since Web addresses tend to be rather long and full of punctuation, the easiest way to make one is to go to the web page with your browser, then select the text (http://...) in the "location" field of your browser, press Ctrl-C to copy it to the clipboard, return to the Make a Link form, click on the entry field and press Ctrl-V to paste in the saved location.

Fill in this form and press submit. If you have edit rights to the profile, the profile will be redisplayed with the new link in the table. If you do not have edit access, then the profile will be redisplayed unchanged. No error message is given.

This form is also used when you use the "Save as Custom Report" option from a report page. In that case, the URL has been preset, all you need to do is to enter an appropriate title for the report and submit.



**Note:** Everything in your repository has an Internet location, so you can use this method to create a direct link to any repository page, view, or navigator.

## Using the Repository Locator

The repository locator is a personalized search page. When you open the locator page, its contents will be largely determined by your previous use.

### The Locator Page



The locator page consists of three sections.

#### Search Options

On the left is a navigator panel with one button for document searching and four buttons for assignment searching.

#### Favorites

At the top is a section labeled Favorites. Favorites are a kind of bookmark feature built into the Repository.

### ***My Responsibilities***

Below the favorites is a section labeled My Responsibilities. This displays a list of all the profiles (project, program, organization, and participant) for which your userid is listed as the first userid. Hence these are entities for which you are the primary owner.

### ***Saved Searches***

At the top is a list of any locator search requests that you have previously saved .

### ***Find Numbered Document***

This displays a transaction form to let you enter the document number and then opens the selected document (if it exists)

### ***Get Project Report, Get Program Report***

This displays a transaction form with options to select a project or program name and a report type. Submitting the form generates the selected result

### ***Find Timesheets for My Approval***

This initiates a search for any timesheets that require your approval and returns a list. You may find that using the Timesheets by Date view is a faster way to do this. In any case, you should have already received and email for every timesheet that is waiting.

## **Search Functions**

The Left side of the Locator page has buttons for document and assignment search functions. These functions are implemented using the full text search features of the Domino system. If your site does not have full text search enabled, they will not work.

### ***Document Search***

Selecting the Document Search function will display a Document Locator Request Form.

You can control your search by selecting the specific project if desired. You can enter text to be found in the matching documents. You can limit the search to any combination of Project, Issue, News, and Discussion document types.

If you want to use the same set of search conditions again, enter a short descriptive title in the field provided. This will cause the search to be saved on your locator page for future use.

When you have made your selections, press submit. This will begin the search process on the server. The results will be displayed when the search is complete. The search results page displays the title, author and type of each document that meets your search condition. This list is numbered, but not sorted. Click on the number of the document to access it.

Note that there is a limit on the maximum number of items to be returned by the search, this is set by a radio button on the request form. If you set the limit to 25 and the last item in the search result is numbered 25, then there are probably more items to be found. If you allow 100 responses and only 79 are listed, you know you have seen them all.

### **Assignment Search**

There are four assignment search function buttons on the navigator panel that are used to define the domain of the search. The top one - All projects, All participants is the most general. The bottom one, One Project, One Participant is the most specific.

Pressing any of the four will display the Assignment Locator Form, but the form will take on a slightly different appearance for each in order to present the proper set of options.

Fill in the form using the minimum number of constraints. Do not overspecify your search as it will simply increase your chances of missing an assignment of interest.

**Assignment Locator Request** [Home](#) [Locator](#)

Assignments In:  (select program name or [All])

Assigned to:  (select organization name or [All])

Starting On or After:  Starting Before:

Ending On or Before:  Ending After:

Current Status:  Additional Conditions:

Taskname contains:

Outline contains:

Methodology contains:

---

	<b>Information</b>	<b>Relation</b>	<b>Value</b>
Date:	<input type="text" value="[Select]"/>	<input type="text" value="equal to"/>	<input type="text"/>
Value:	<input type="text" value="[Select]"/>	<input type="text" value="equal to"/>	<input type="text"/>
Text:	<input type="text" value="[Select]"/>	<input type="text" value="does not contain"/>	<input type="text"/>

Max:  25  100  250  1000 items returned

Title:  (enter title to save search definition for reuse later)

If you anticipate reusing this search, enter a short title in the field provided. This will cause the search to be saved on the locator form. When you have entered the necessary conditions, press Submit. The server will return a list of assignments meeting the criteria. This list is not date ordered so you will need to examine all of it to insure that you have not missed something you may be looking for.

**Locator Search Request Results**

	What	Who	Status	Start Date	Project	Done	Remaining
1	Project complete	Marketing/Debbie	Future	09/05/97	Project Gateway Sample	0	0
2	All components ready for review	Marketing/Debbie	Future	06/25/97	Project Gateway Sample	0	0
3	Print	Marketing/Dale	Future	08/18/97	Project Gateway Sample	0	12
4	Print 100 review copies	Marketing/Dale	Future	06/26/97	Project Gateway Sample	0	4
5	Circulate Draft	Marketing/Dale	Future	06/12/97	Project Gateway Sample	0	40
6	Index	Marketing/Dale	Future	08/14/97	Project Gateway Sample	0	16
7	Make Style corrections	Marketing/Dale	Late	05/13/97	Project Gateway Sample	0	16

[Return To Repository Locator](#)  
[Return To Repository Center](#)

## Reusing and Removing Searches

Click on the search title to display the saved search form. Click on the "ReRun Search" button to re-execute the search without changing it. Click on the Delete button to remove the search from the locator.

## Using Favorites

**Assignment** [Assigns](#) [Projects](#) [Participants](#) [Home](#)

To put a document into the favorites lists, display the document then press the "finger with string" button that appears at the top of the form. Pressing this displays a simple transactional form with a submit button.

Add this document to the Repository Locator page

Submit

Submitting this form will add the favorite to the list and display the Locator page. Since the new favorite is on the page, you can click on it to return to that document if you want to.

To remove a favorite, click on the underlined word "remove" which appears to the right of the favorite link. This will display another simple transaction form. Pressing submit will remove the favorite from the list and return to the Locator. **Removing the favorite does not have any effect upon the document being referenced.**

Notes: Favorites are recorded in association with your userid. That way no one else will see them. However, if your userid changes, you will not be able to see your favorites.