

Using the Repository Archive

Overview

The archive is a database for storing completed projects, deliverables, and timesheets so that they can be retained for future reference, but removed from Repository Center.

The layout of the archive is exactly the same as that of the repository with the addition of a new Archive Administration Navigator to control the transfer of information.

Starting in Version 5.1, the system will automatically archive finished or canceled projects. You can also manually archive projects at any time.

There are several important options that control the operation of the archiving process. The most important of these options concerns how archiving will change the production repository.

These are selected on the Archive Profile form that must be set up in this database before archiving can occur.

The Archive Administration Navigator

The Archive Administration Navigator provides access to the list of pending and completed archive actions and to the actions for creating new project and deliverable archiving requests.

The final item on this navigator opens the Archive Profile View that should have exactly one document. This document is the Archive Administration Profile document. If this document is missing or incorrectly configured the archive will not function properly.

The proper configuration of the fields in the Archive Administration form are described in the Project Gateway Administration manual in the chapter entitled "Configuring the Suite Databases."

Project Archiving

What happens during Project Archiving

The archiving agent will move the following documents to the archive

1. Project Profile
2. All Assignment documents of the project
3. All Issue, Risk, Scope and their response documents associated with the project
4. Project Documents and prior versions of same (all formats) associated with the project.
5. InterProject and Calendar Dependency Documents that use this project as a dependent event.
6. All Status reports associated with the project.

Automatic Project Archiving

Automatic archiving is done as a two step process. A special agent detects projects that are ready to be archived. This agent creates an archive project request form.

The archive project request form is then processed by the normal archiving agent to move the project information to the archive.

Automatic archiving is done only in very specific conditions so that it will never occur accidentally.

Conditions for Automatic Archiving:

1. The project must be set to the approval state of Finished or Canceled. Since only the project manager or a PGADMIN can change the approval, this will prevent anyone else from initiating the process.
2. The Allow Archiving checkbox must be checked in the project profile. If this is not checked, the project will not be automatically archived. The project leader can use this to "hold off" archiving as long as desired.
3. A certain waiting period must have elapsed from the effective date of the finish or cancellation before the archive request is created. This waiting period is set in the archive profile form. We suggest a default period of 14 days to allow plenty of time for the closeout of project work. Note that this time delay begins after the effective date set at the time the approval state is changed. So if, on the first of the month, a project is marked as finished, effective that day, automatic archiving will not begin until the delay period has expired. If this is 14 days as suggested, then the project will not be archived prior to the 15th.

Manual Project Archiving

Using the Archive Administration Navigator, select the "archive a project" action.

Archive Project Request Form

This form instructs the system to copy the project from the production repository to this archive and then delete the project in the production database. You cannot "undo" this action once the project has been archived, it cannot be restored to production status. All project assignments and supporting documents will be copied during the archive process.

Select Project: **Website design**

This displays a list of projects in the production repository (MainNotes: PG581Demopp.nsf)
Projects that have already been archived or for which archiving is currently pending will not be shown.

UniqueID:	951912264
Manager:	Anonymous
Program:	Development/Software

Status: Pending

Documents Archived: 0
Documents Marked for Deletion in production database: 0
Documents Physically Deleted in production database: 0
Request created by: Gay M. Cole/MainResearch on: 12/05/2001 02:35:51 PM

This will display a form that provides a list of all current projects in the production repository.

Select one of these projects and submit the form. The actual archiving is done by an agent that generally is set to run during the night (although the schedule at your site may be different).

Archiving a Deliverable

Using the Archive Administration Navigator, select the "archive a deliverable" action.

Archive Deliverable Request Form

This form instructs the system to copy the deliverable from the production repository to this archive and then delete the deliverable in the production database. You cannot "undo" this action, once the deliverable has been archived, it cannot be restored to production status. All subdeliverables and supporting documents will be copied during the archive process.

Select Deliverable: **Finance**

This displays a list of deliverables in the production repository (MainNotes: PG581Demopp.nsf)
Deliverables that have already been archived or for which archiving is currently pending will not be shown.

Status: Pending

Request created by: Gay M. Cole/MainResearch on: 12/05/2001 02:40:03 PM

This will display a form that provides a list of all current first level deliverables in the production repository. Note: Only an entire deliverable tree can be archived, not an individual sub-deliverable item.

Select one of these deliverables and submit the form. The actual archiving is done by an agent that generally is set to run during the night (although the schedule at your site may be different).

The archiving agent will move only the requested deliverable, and all associated subdeliverables, to the archive.

Archiving Timesheets and Profiles

Archiving Timesheets

Completed timesheets can be moved to the archive.

The system uses a "cutoff" date to select timesheets for archiving. This cutoff date is specified in the Archive Administration Profile.

Only those timesheets posted prior to the cutoff date will be archived.

Timesheet archiving is done only while archiving a project or deliverable. There is no way to archive timesheets alone. If you just want to archive timesheets, set the date in the Archive Profile, create a "dummy" project profile in the repository, and archive that dummy project manually.

Shadowing Profiles

Depending upon the setting in the archive profile document, the system may maintain copies of the following documents in the archive:

1. Participant Profiles
2. Organization Profiles
3. Program Profiles

These are maintained in the archive so that it is easier to navigate. The normal mode of operation is "Maintain Up to Date Copies" that will update the archive copy of a profile if the repository copy is changed.

Note that the archiver never deletes one of these profiles from the repository, it only deletes project profiles.