
Project Gateway[®]

6

System Administration Manual

The Complete Reference

for Lotus Notes[®] and Lotus Domino[®]

 **MARIN**
RESEARCH INC
Bringing Projects Into Focus

Project Gateway® System Guide for Administrators

Version 6

Revision A

September 2004

Copyright (c) 1994-2004 by Marin Research, Inc.

All Rights Reserved

No part of this document may be reproduced in any form without the written permission of Marin Research, Inc.

Project Observatory™, Checksheet™, Project Telemetry™, Project Gateway®, Project Directed Workflow™, ProjectGo!™, Ask Project Gateway™, and the distinctive Gateway globe are trademarks of Marin Research, Inc. "Total Project Information. All the Time. Everywhere."™ and "Connecting Your Project Community"™ are service marks of Marin Research, Inc. Lotus® and Lotus Notes® and Domino® are registered trademarks of IBM Corporation. Windows® is a trademark, Internet Explorer® and Project® are registered trademarks of Microsoft Corporation. Primavera® and SureTrak® are registered trademarks of Primavera Systems. Project Workbench® and PMW® are trademarks of Niku Corporation. Open Plan® is a trademark of Welcom Software. Palm® is a registered trademark of Palm Computing.

Marin Research, Inc.
9650 Gateway Drive, Suite 102
Reno, Nevada 89521

internet: info@marinres.com
web: <http://www.marinres.com>

Contents

Project Gateway Installation	1
Overview	1
System Requirements	1
Installation Time	1
Domino Server Configuration	2
The Setup Process	3
Step 1. Retrieve Copy and Sign the databases	4
Installation Packages	4
Step 2. Set the Access controls for each database.	6
Step 3. Configure the Administration documents in each database	8
Step 4. Activate the database agents in each database.	8
Activating your scheduled agents using the Agent Status Report	8
Activating Agents Manually	10
Step 5. Installing the Project Gateway Tools for Project Managers	10
Additional Setup for Connecting to Project Observatory™	11
Additional Setup for Project Web Publishing	11
Disabling ProjectWeb Operation	12
Configuring your new Repository	13
Repository Setup	13
Database Licensing	13
Configuring the Administration (Field Map) Document	13
Fields used for Project Information Transfer	14
Progress Recording Settings	14
Timesheet Customization, Overhead Settings, and Document Customization	14
Security	14
Web Access Settings	15
Repository Suite, Observatory and Portal Setup	16
Management Agent Profile	19
Participant Agent Profile	20
Miscellaneous Setup	20
Document Tracking Agent Profile	21
Calendar Dependency Setup	21
Customizing the Online Guide	21
Timesheet and Document Customization	23
Timesheet Customization Settings	23

Overhead Settings	25
Document Customization Settings	26
Issue/Risk Types	26
Creating Custom Project Documents	30
Configuring the Suite Databases	31
Overview	31
REQUEST CENTER	31
Creating the Request Admin Profile Document	31
Testing Web Operation	33
REPOSITORY ARCHIVE	35
Creating the Request Admin Profile Document	35
Testing Web Operation	37
METRICS CENTER	38
Creating the Metrics Admin Profile Document	38
Testing Web Operation	38
COSTING CENTER	40
Creating the Costing Admin Profile Document	40
Testing Web Operation	41
Initializing the Repository Structure	43
Repository Setup - Profiles	43
Organization Setup	43
Program Profiles	44
Participant Profile Setup	45
Security Administration	47
Overview	47
Security for Manually Generated Documents	47
Security for Automatically Generated Documents	48
User ID fields in Project and Participant Profiles	48
Adding a Project to an existing Repository	48
Using Synchronize Update Notes	49
Maintaining Assignment Security	49
ROLES: [PGADMIN] and [PGMASTER]	50
Timesheet Security	51
Security in Web Operation	51
Timesheet Administration	53
Introduction	53
What's New in 6	53
Driving the Timesheet Process	54
Timesheet Setup - Participant Profile Settings	54
Posting Timesheets	56
Finding Missing Timesheets	57
The Missing Timesheets Report	57

The Missing Timesheets Agents	57
Correcting Posted Timesheets	59
Correcting Notes Timesheets	59
Correcting Posted Web Timesheets	62
Recosting corrected timesheets	64
Calendar & Scheduling, PalmPilot® & IBM WorkPad® Agent Administration	65
Introduction	65
Recipient Mailbox Setup	66
Using the ProjectGo Mailbox Agent	66
Assignment Transfer Setup	66
Dashboard Transfer Setup	67
Upgrading Existing Databases	69
Overview	69
Preserving your existing design customizations	70
Replacing your Repository Design - Notes R5/R6	71
Updating Information Documents	73
Updating the Repository Administration (Field Map) Document.	73
Updating Existing Profile Documents	73
Activating the Updated Repository	74
Reintegrating your design modifications.	74
Agents	77
REPOSITORY	77
COSTING CENTER	107
METRICS CENTER	109
REQUEST CENTER	110
REPOSITORY ARCHIVE	111
ENTERPRISE TIMEPORTAL	112

