Configuring your new Repository

Repository Setup

Now that the database is running on the server and the access control list is in place, you can begin the process of adapting the system to your environment. These changes should be done using a Notes Client and running with an ID that has [PGADMIN] and [PGMASTER] roles.

Database Licensing

Find your Marin Research License agreement.

It is your obligation to limit access, using the Access Control Lists on each database created under this license, so that no more than the licensed number of named individuals have reader access or above to any of the databases created under this license.   This is a named individual limit, not a concurrent use limit. You may use Notes Groups for the purpose of access control so long as all members of the group are counted as named users.

No anonymous (i.e., default) access is allowed to any Project Gateway database from Notes or Web Clients. Allowing unlicensed users access to the database is a violation of the licensing agreement and a form of software piracy.

If you are unsure about the license terms or limits that apply to your site please contact Marin Research, Inc. Do not make the database(s) available (except for a limited period, non-production evaluation) until you have determined that you are in compliance with the license terms for your site.

Configuring the Administration (Field Map) Document

Before Project Gateway can be used, you must review and make necessary site specific entries into the administration document.

How to access the administration document:

1. Open the database.
2. Click on the "Reports" option.
3. Click on the "Open the repository administration form" item.

There can be only one document of this type in the repository. It is prebuilt into our design and should be found in your new repository. If it is not found by the process above, please contact your Notes administrator because the database has not been properly loaded.

This is a very large form containing many optional settings. Please follow the instructions in this chapter and the next and you should not have any problems. If you are installing only a repository, you may need to enter as few as 2 or 3 entries. If you do not understand the option, do not change it. Please feel free to call Marin Research for advice when preparing this form.

Fields used for Project Information Transfer

Please do not change this unless you are very familiar with Project Gateway and have previously modified Field Maps.

Progress Recording Settings

Please do not change these settings.

The proper start date is 1/1/90 for almost all applications. Do not change this to the current date, no matter how logical that may seem to you. The 1/1/90 base period setting will work fine for another 100 years.

Changing these settings will require you to make time-consuming Notes design manual modifications to large numbers of views.

Timesheet Customization, Overhead Settings, and Document Customization

Read the instructions in the next chapter "Timesheets and Documents Customization" of this manual to configure these options. For most sites, the default values will be acceptable so you can defer this review to another day if desired.

Security

Enable Security Setup on new projects

- *The default setting is "Normal* - *Edit Access Control"*

This tells the system to set author lists on every document created during project publication. These lists then limit editing rights of author level users.

- *Optional setting* - *"Full* - *Edit and Reader Access Control"*

This should not be used until you have tested it in a controlled environment and are happy with the behavior. This command tells the importer to set READER control lists on every Assignment document. The result is that you can only see documents that you can edit.

This is very restrictive and not very conducive to better collaboration. For example, it means that you cannot see the assignments that are predecessors of the ones you are working on if they are assigned to another person.

Note that using this setting prevents anyone from seeing the documents, even if they have editor or manager rights to the database. So it is very easy to become confused and think that data is missing.

Another effect of using reader lists is that views that normally tabulate documents (like workload forecasts) will show only the documents you can read, but will show headings for categories containing documents that you cannot read. So the categories have twisties that do not reveal anything when clicked. Another side effect is that views that show totals will show the totals for all documents, but only the detail documents visible to you so it will appear as if the computer is unable to add correctly.

Allow new participants to be created when importing project plans

The default setting is - *"Yes* - *(normal operation)"*

Optional Setting - *"No* - *reject plans using undefined participants"*

Note: "NO" is the proper setting for a production system.

The "Yes" Option. Use only for testing.

When used with this setting, if a project plan uses a resource "Joe" and is published, if there is not already a participant record for "Joe" a new one will be created. The underlying assumption is that if three plans all use the same person, then each plan will spell that person's name exactly the same way. If not, you will get three different participant profiles "Joe" "Joe Brown" "Joseph J. Brown Sr." This will look bad and prevent a person from using a single timesheet for all their work.   This setting is fine for small cooperative teams, but the optional setting is better for large groups with many planners.

The "No" Option - *recommended for all production systems.*

When this is in effect, you cannot publish a plan that uses a participant who is not already defined in the database. This prevents anyone from creating new participants "by accident," but also forces all new participants to be entered manually. This option works well for large organizations and greatly minimizes the amount of work for the administrator in fixing mistakes made by the project planners. It does slightly increase the workload on the project planner to use correctly written names in all plans if a collection of existing plans is being loaded.

Web Access Settings

Send Doclinks

The default is "Include Doclink" the Option is "Do Not Include"

When email is created by Project Gateway (Assignment Tracking, Document Tracking, Dashboard Alerts, Dependency Tracking, etc.) this controls whether on not a doclink is created to the originating documents referenced by the message. Doclinks work only with Notes mail, so if you do not use Notes Mail, you do not want doclinks.

URL FOR THIS DATABASE

Enter the URL (web address) of this database if your server allows web access. Leave this field blank if web access is not permitted. Please note, if you leave the field blank, then many of the report functions normally provided to Notes users will be disabled because they generate html report pages.

The URL must include the full address through the database file name in URL format. Make sure that the name of the database is capitalized just as it is recorded on the server (database properties, information tag). This is particularly important on UNIX-based Notes servers are which are case sensitive.

Note that this is the URL of the database as seen by the client.

This field is used to construct URLs throughout the Project Gateway application and that are included in system generated emails.

If your database is in the server's data directory root, then the form should be **http://www.mysite.com/database.nsf**

If the database is in a subdirectory path of the server's data directory, then relative path must be included.

e.g. **http://www.mysite.com/projects/repositories/database.nsf**

To test the URL, copy it into your web browser and open it. The Repository Center page for this database should appear. You can also test this value by clicking on the WebHome action at the top of the form after the form has been edited. If this action opens the repository to the home page, then your entry is correct.

Repository Suite, Observatory and Portal Setup

After you have created the desired suite databases, you can complete this section of the repository administration form.

Note that each of the suite databases requires additional setup.

Completing this section of the administration form requires only that you know the file names and URLs of the other databases.

Instructions for configuring each of the suite databases are found in a later chapter.

General Information

File names should be entered relative to the data directory of the server.

If the database in the server data directory, then enter the name "PG6M.NSF"

If in a subdirectory such as "doc" then enter the relative path e.g., "doc\PG6M.NSF"

PROJECT OBSERVATORY CONNECTION SETUP

URL of the Observatory Database **-** Enter the URL of the Observatory Center database (this will be found in Observatory Administration form)

If you do not have an Observatory, make sure this field is left blank because the system uses the value of this field to generate report links.

Select Connection Method:

If the Observatory is on the same server as this repository, then select "via Direct Submission" otherwise select "via Email." Then enter at least one of the following two items.

Mail-in name of the Observatory - enter the name you have selected for the this Observatory in the Mail In Databases section of the Name and Address book.

Database filename of the Observatory - enter the name just as it appears on the File Database Properties information tab of the Observatory Center database.

Timesheet Overhead reporting

The settings are "Update observatory overhead projects" and "Report timesheet overhead hours"

This works in conjunction with Custom Overhead Projects feature in Project Observatory V3.

Until you have created one or more Custom Overhead Projects in your Observatory, you should set the first option to "Never".

Update observatory overhead projects

The choices for "Update observatory overhead projects" are: Never, Everyday, and Weekly on Sunday, Weekly on Monday, etc.

Report timesheet overhead hours

The choices for "Report timesheet overhead hours" are: All, Past 2, Past 4, Past 13, Past 26.

After you have defined your Observatory overhead projects, set the first option to either everyday or to Weekly for the day after which you expect your timesheets for the previous week to have been posted. This is usually Sunday, Monday or Tuesday depending upon what approvals you use. Since timesheets change only once per week, you reduce the processing time by sending updated data just once per week.

If there are many months of timesheet already stored in the repository, set second option to "All". After about a month of operation, change this to "Past 4 weeks"

If you are using a new Repository and an new Observatory, then set the second option to "Past 4 weeks".

The choice of the best setting for the second option depends upon how corrections are made to timesheets. If you never correct any timesheets after the first week, then you can minimize computation by selecting "Past 2 weeks". If however, prior timesheets are frequently corrected many weeks after they are originally posted, then you should choose a setting that will encompass the earliest correction you expect to see.

The Repository Link agent uses these settings to export the overhead hours from timesheets to Observatory as a series of "Overhead Project Reports". The reports will contain all the overhead hours reported for a particular overhead category going as far back in time as specified by the second parameter.

The Observatory receives these reports. It uses the overhead category name to select a Observatory Overhead Project using the rules specified in the Custom Overhead Project Report Definition forms. More than one repository overhead category can be mapped into a single Observatory Overhead project. And overhead reports from several repositories for a single category can be mapped into an Observatory Overhead project.

Unlike regular project reporting, overhead reporting is incremental. This means that the system does not need to send every timesheet hour from the beginning of time, but only those which are new or which may have changes since they were previously reported.

If you decide to change the structure of you custom overhead projects, then you should also change the "Report timesheet overhead hours" settings back to "All" so that the entire data set is retransmitted to Observatory. By doing this, the new Observatory Overhead projects will be completely regenerated.

PROJECT GATEWAY ENTERPRISE TIMEPORTAL SETUP

URL of the Portal database

If you have an Enterprise TimePortal database, enter the URL used to open this portal database. This will found in the Portal Administration Form. Otherwise, leave this field blank.

REPOSITORY ARCHIVE

Archive Database file name

Enter the file name of the archive database, exactly as it is shown on the File Database Properties information tab. If you do not have an archive database, leave this field blank.

REQUEST CENTER

Request Center database file name

Enter the file name of the request database, exactly as it is shown on the File Database Properties information tab. If you do not have a request database, leave this field blank. If you have more than one request database, enter the file name for the one that would be most likely to be of general interest to your web users.

COSTING CENTER

Costing Center Database file name

Enter the file name of the costing center database, exactly as it is shown on the File Database Properties information tab. It is very important that you get this database name correct - please verify it.

If you do not have a costing database leave this field blank.

METRICS CENTER

Metrics Center database file name

Enter the file name of the metrics database, exactly as it is shown on the File Database Properties information tab. If you do not have a metrics database, leave this field blank.

Metrics Center database URL

Enter the URL used to open the metrics center database. You should be able to find this on the Metrics Admin Profile Form.

If you do not have a metrics database, leave this field blank.

You should find this on the metrics center database administration form in the "URL of this database" field.

Metrics database server name

Enter the full server name for this database as found on the File Database Properties information tab.

e.g. MarinNotes/MarinResearch

Email Address of metrics manager -enter the user ID or external email address of the metrics manager - this person will receive email whenever new Questionnaire Assignment Requests are generated. This person would in most cases be the manager of the metrics database.

User ID of metrics manager - enter the User ID of the metrics manager and any other people who should have editing rights to questionnaire assignment request forms. This is probably the same as the previous entry.

Enable processing of : [x] Project Completion [x] Phase Completion [x] Assignment Completion

This tells the metrics agents what events should be used to initiate the metrics process. A "phase" in this context means the completion of all the assignments in a first level summary task of the project. Naturally, if you check assignments, every assignment completion will be routed to the metrics manager. This can become a lot of work, but also gets the most knowledge recorded. The next setting filters assignment completion so that only the larger ones are processed.

Do not process assignment if actual work less than [n] hours

A typical setting for this filter would be 8 hours.

Management Agent Profile

Set the default prompts and rules that will be used for each new participant. These setting are inherited to all newly created Project

Profiles. The agent name and introductory message should be customized to something appropriate for your site.

Participant Agent Profile

Set the default prompts and rules that will be used for each new participant. These settings are inherited by all newly created Participant Profiles. The agent name and introductory message should be customized to something appropriate for your site.

Miscellaneous Setup

Management Welcome Messages

This text is sent once to each new project manager by the ProjectGo system.

Text for Project News Messages.

News items are created when projects are published for the first time and optionally when they are updated. This is the text of those messages. Note: These are created in the News view, not as email.

These entries are used to compose news items when projects are published or updated. The %1 symbol shows where the Project Name will be inserted into the message. If you clear these fields, no news messages will be created.

Note: Update news is only generated for those projects whose project profiles setting for "Create News on Update" is Y. The default value of this setting for new projects is "N".

Web Repository Logo Setting

This is where the URL used for the logo on the Repository Center web home page is recorded. You set this using the SetLogo Action on this document using a browser.

TaskHelp Setup for ProjectWeb Publisher Operation

If you are going to use Taskhelp on projects with the ProjectWeb publisher, you must set the parameters for the Taskhelp database here.

When TaskHelp is implemented on projects published from Notes clients, these parameters are specified in the Project Gateway dialogs. ProjectWeb clients can only use the TaskHelp database specified here.

Links Shown in Online Guide

These fields present the three lists shown on the Knowledge Gateway page of the Repository for Methods and Practices, Online Help, and Professional Resources.

You should enter links to your internal company sites and review the others to see if you want them.

These fields are comma separated text lists in the form:
Description=location

Description is the text that will appear on the Knowledge Gateway page.

Location should be the fully specified web address. The easy way to get this is to find the page in your browser, select the location field, copy (Ctrl-C) and paste it into the Notes field.

Note that we include a link to the Marin Research Site that reaches a page containing the Project Gateway User Manual in (PDF) Adobe Acrobat format. You can download those documents if you wish and maintain them as a local site.

Document Tracking Agent Profile

Set the default rules that will be supplied for each new project. These setting are inherited to all newly created Project Profiles.

Calendar Dependency Setup

If you want to use the calendar dependency feature, enter the calendar name and the server name here. This calendar file name must be on the same server as the repository. To accomplish thus you will probably have to setup a replica of the calendar on this server.

Customizing the Online Guide

This is a part of the database provided for your customization. The Online guide view contains all documents created with the OnlineGuideForm. You can add or remove topics using either a Notes or Web Client. If you use a Notes client, then you can paste richtext, including pictures into the body of the document rather than be restricted to plain text.

We suggest that you consider adding topics for your organization and providing specific examples that use your own projects and codes so that your people can easily relate to the system.

Topics to add might include how to contact the repository administrator, who to call to get new organizations or participants setup, how to estimate projects, when and how to do Timesheets, Issues, etc.

To create a new topic from a Notes client, Create Other... OnlineGuideForm. To create a new topic from a Web browser, you must have [PGADMIN] role. If you do, display the OnlineGuide. In the lower center of the page is link to create a new topic.

The Online Guide form has a keyword field that indicates whether the topic is to be shown to Web users, Notes users, or both. This allows you to make two topics with the same title but different instructions for the two kinds of clients.