Configuring the Suite Databases

Overview

This chapter provides instructions to setup the profile forms in the Request, Archive, Metrics, and Costing databases.

Before you begin, you should have created these databases on your server and signed the design as described in the previous chapters.

You can use any or all of these components in conjunction with one Repository. You may use multiple Request databases with a single repository and multiple Repositories with a single metrics database.

REQUEST CENTER

Creating the Request Admin Profile Document

Open the database

Create - Other - Request Admin Profile

Enter the following information:

Service Request Manager

Enter the User ID of the person who will receive all new service requests and will schedule their implementation (or route them to others for scheduling) This person should also be designated as a [PGADMIN] in this database.

Department and Phone are optional

Request Center URL

Enter the URL used to open this database from a browser. This should include the filename of the requests database.

Production Repository

File Name - enter the file name of the Repository Center database (not the requests database!)

Operating Rules

Starting Request #

Enter a number which will be the beginning of the sequence for new requests usually 1 or 100 unless you have some existing numbering system in place.

Don't Notify List

This is the list of people who should **not** receive email notifications from this database. The service request manager would probably want to be on this list if the request system was used frequently.

If notifications are not sent, requests can sit in limbo until the intended person notices that something is waiting for them. Therefore, leave this item empty until the system is in operation and only add people who you know will check the system daily.

Routing List:

Enter the names of people who should always be included in the list of candidates for routing requests for estimating or scheduling. These will be listed in addition to the automatic [Manager of ...] listing which is based upon the repository structure.

Priority Levels:

Enter the names of the possible priority levels that you would like to have in order with the most urgent priority first.

The preset values are High, Medium, and Low.

These will be the choices available when a priority manager decides to set a priority.

Priority Level of New Requests:

This will be the priority assigned to every new request. It must be one of the priority titles you have defined above.

Priority Managers List:

Enter the names of the people who are authorized to set or change priorities of requests.

Archiving

The lifecycle of a request always ends in the archive, which is section of this database. These three rules are used by the system to automatically change active requests into archived requests. They are each preset to 14 days as a reasonable starting point.

Archive completed requests after [x] days.

This will tell the system to automatically archive a request x days after it has been marked as completed (by the completion of the scheduled work in the connected repository). This cleans out your completed requests after a period of time.

Archive canceled requests after [x] days

This will tell the system to automatically archive a request x days after the request itself has been canceled by the requester (or an administrator).

Archive disconnected requests after [x] days

A request becomes disconnected if the assignments or project that was created to implement the request can no longer be found in the repository. This can be caused by the canceling or completion of the project and its subsequent archiving.

Custom Request Setup:

This section allows you to incorporate new request forms into the system. You must first create such forms, then come here to record the title and corresponding form name. The titles listed here will be presented in a list to the user whenever a new request is created.

[ ] Enter the titles of any custom forms you create. Separate items with commas.

[ ] Enter the corresponding Notes formnames for each of these custom forms whose titles are listed in the previous field. This list must have the same number of entries as the one above

[ ] Exclude Standard Request Forms

Check this if you want to hide the built in Standard Request form so that only your custom forms are displayed.

Web Request Center Logo Setting

The URL of the logo file will be shown here. It is set with the SetLogo Action which is displayed at the top of this form when you display the form from a web browser. The logo cannot be set by a Notes Client, it must be done via a browser. Note that the logo is only displayed for browser clients.

Testing Web Operation

Open the *Repository* using your web browser.

If the repository database is properly configured, a link labeled "REQUESTS" should appear in the lower part of the center panel on the Repository Center home page next to the words "GO TO". Clicking this link should open the Request Center database home page.

Note: If this link does not appear or does not work, the Repository Administration form was not correctly completed. Revisit the Repository Suite, Observatory and Portal Setup instructions found in the previous chapter and check the Request Center entry.

When the Request Center home page appears...

Click on "Administration" to open the Administration View.

Click on the words "Request Profile". This will open the profile document for display.

At the top of the form is the action "WebHome."

Click on it.

This should display the Request Center home page again. If not, then the "Request Center URL" is not properly entered and should be corrected before proceeding.

Setting a Logo

When the WebHome action operates correctly...

Click on Administration and Request Profile again.

If you have a logo file (.gif or .jpg file) available, click on "SetLogo"

On the form, use the "browse" button to select the file.

Submit the Set Logo Form.

The system will reopen the Request Center database with the logo incorporated in the center display area. You can repeat the SetLogo action as often as necessary until you get the desired picture.

REPOSITORY ARCHIVE

Creating the Request Admin Profile Document

Open the Archive database using your Notes client.

Create - Other - Archive Admin Profile

Archive Manager

Enter the User ID of the Archive manager

Department, Phone and Email are optional (this database never sends email)

URL of this archive database:

Enter the URL used to open this archive database from a browser. This should include the filename of the database.

Production Repository

Server Name - enter the name of the server where all of the databases are located, this must be the server where the agents are scheduled.

File Name - enter the file name of the Repository Center database. Note: NOT the archive database!

Archive Operating Rules

Automatic Archiving Delay:

When a repository project is marked finished or completed, and when the "allow archiving" checkbox is set in the project profile, the project becomes a candidate for archiving.

The system adds this delay (which is expressed in days) to the effective date of the project completion or cancellation (which was entered when the project approval state was changed) to derived an effective "first date" for archiving. When this date arrives, the Auto-Archive Request agent will create an "archive project request" document. On the next archiving cycle, the project will be archived.

The purpose of the delay is to allow final timesheets to be posted, the request center status to be updated, and the Observatory to be updated with the final status of the project before archiving removes it from the repository.

The minimum delay is one day, the recommended setting is 14 days or longer.

Archive Timesheets Posted before this date:

Enter a date which may not be sooner than one month ago. When the archive process runs, any timesheets found prior to this posting date will be transferred to the archive.

Profile Documents:

This defines how Program, Organization, and Participant Profiles are duplicated in the archive. Project Profiles are archived with the projects, the others are copied to preserve the data structure but are never changed in the repository.

Default **-** *Maintain up to date copy* **-** whenever a newer version of a profile document is found, make a copy of it in the archive and replace any previous version.

Option **-** *Make copy when first encountered* **-** this copies a profile only once, It is somewhat more efficient, but the archive may not remain consistent with changes in organization or program structure.

Option **-** *Ignore* **-** when the selected profile will not be copied to the archive. This makes the archive more difficult to navigate.

Note: These profiles will never be deleted from the repository, the archiver copies them only to make the archive more useful to users.

Document Removal Method

THIS IS IMPORTANT

Option 1 - Mark source documents for removal by project repository purge agents

This is the recommended mode of operation because it allows archiving to be Undone for a period of time.

If selected, the archive will copy a document to the archive, verify its copy, and then change the form name of the original document in the repository so that it becomes a "Document Marked for Deletion" in the repository database. Note that the document still exists in the repository. Once marked however, it is a candidate for the PGDocumentPurge Agent which generally is configured to delete documents about 30 days after they are marked. Up until that time, the document can be "undeleted" by editing it from the All Deleted Documents view.

This is a conservative mode of operation that allows for the possibility or undoing a mistake (albeit with considerable manual effort required to restore many documents).

Option 2 - Physically delete source documents immediately

If selected, the archive will make a copy of the source document, verify its copy, and ***immediately physically delete the document*** from the production repository. Selecting the wrong project or deliverable to archive is then very serious because there is no simple way to restore the data. We do not recommend doing this unless you keep careful control on the use of the archive.

Option 3 - Archive Only - do not change source documents

If selected, the archive will make its copy, but will not change the production repository. This can be used as a way of testing the system or simply as a way of ensuring that some backup exists. Note however, you cannot copy document from the archive to the repository and expect them to be fully usable because the unique internal Notes identifiers will be different. So this is not a substitute for a proper database backup strategy. It is a harmless way, however, of testing the archive function.

Web Request Center Logo Setting

The URL of the logo file will be shown here. It is set with the SetLogo Action which is displayed at the top of this form when you display the form from a web browser. The logo cannot be set by a Notes Client, it must be done via a browser. Note that the logo is only displayed for browser clients.

Testing Web Operation

Open the Repository using your web browser.

If the repository database is properly configured, a link labeled "ARCHIVE" should appear in the lower part of the center panel on the Repository Center home page next to the words "GO TO". Clicking this link should open the Archive Center database home page.

> Note: If this link does not appear or does not work, the Repository Administration form was not correctly completed. Revisit the Repository Suite, Observatory and Portal Setup instructions found in the previous chapter and check the Archive Center entry.

When the Repository Archive home page appears...

Click on "Archive Administration" from the horizontal menu to open the Archive Administration Navigator

Click on the words "Archive Profile". This will open the Archive Profile view.

Click on the words "Archive Profile" This will open the profile document for display.

At the top of the form is the action "WebHome."

Click on it.

This should display the Repository Archive home page again. If not, then the "URL for this database" is not properly entered and should be corrected before proceeding.

Setting a Logo

When the WebHome action operates correctly...

Click on Administration, Archive Profile and Archive Profile again.

If you have a logo file (.gif or .jpg file) available, click on "SetLogo"

On the form, use the "browse" button to select the file.

Submit the Set Logo Form.

The system will reopen the Repository Archiver database with the logo incorporated in the center display area. You can repeat the SetLogo action as often as necessary until you get the desired picture.

METRICS CENTER

Creating the Metrics Admin Profile Document

Open the Archive database using your Notes client.

Create - Other - Metrics Admin Profile

Database Manager

Enter the User ID for the manager.

Note that person should also be an Author with the [PGADMIN] role in this database.

Department & Phone - optional

URL of this Database

Enter the URL used to open this metrics database from a browser. The identical information should be entered in the metrics center part of the Repository Suite setup section of the Repository Administration form.

File Name of Repository

Enter the file name exactly as it is shown on the File Database Properties Information tab for the Repository database. This should include any subdirectories.

Web Metrics Center Logo Setting

The URL of the logo file will be shown here. It is set with the SetLogo Action which is displayed at the top of this form when you display the form from a web browser. The logo cannot be set by a Notes Client, it must be done via a browser. Note that the logo is only displayed for browser clients.

Metrics Center Links

This is an optional table of URLs and titles that will appear on the web home page. If you have an Observatory system, then you should put a link to it in this section so that visitors coming from Observatory will have a link back to Observatory Center.

Testing Web Operation

Open the Repository using your web browser.

If the repository database is properly configured, a link labeled "METRICS" should appear in the lower part of the center panel on the Repository Center home page next to the words "GO TO". Clicking this link should open the Metrics Center database home page.

> Note: If this link does not appear or does not work, the Repository Administration form was not correctly completed. Revisit the Repository Suite, Observatory and Portal Setup

instructions found in the previous chapter and check the Metrics Center entry.

When the Metrics Center home page appears...

Click on "Administration" to open the Administration View.

Click on the words "Metrics Administration Profile". This will open the profile document for display.

At the top of the form is the action "WebHome".

Click on it.

This should display the Metrics Center home page again. If not, then the "URL for this database" is not properly entered and should be corrected before proceeding.

Setting a Logo

When the WebHome action operates correctly...

Click on Administration and Metrics Administration Profile again.

If you have a logo file (.gif or .jpg file) available, click on "SetLogo"

On the form, use the "browse" button to select the file.

Submit the Set Logo Form.

The system will reopen the Metrics Center database with the logo incorporated in the center display area. You can repeat the SetLogo action as often as necessary until you get the desired picture.

COSTING CENTER

Creating the Costing Admin Profile Document

Open the database

Create - Other - Costing Admin Profile

Manager

Enter the User ID of this person **-** also ensure that this person is an author and has the [PGADMIN] in this costing database.

Department, Phone are optional

URL of this database:

Enter the URL used to open this costing database from a browser.

Repository Server name

Enter the name of the server on which both the Repository and this costing database are located. This can be found in the File Database Properties Information tab.

File name of Repository Database

Enter the file name exactly as it is shown on the File Database Properties Information tab for the Repository database. This should include any subdirectories.

Send Doclinks in Email

When email is created by the costing database this controls whether or not a doclink is created to the originating documents referenced by the message. Doclinks work only with Notes mail, so if you don't use Notes Mail, you don't want doclinks.

The costing center database will send email for changes in dashboard status.

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

Force ManualApproval of all incoming billing records:

Default: Approval Automatically, Option: Force Approval.

This is a master switch to force every incoming record to be held for manual approval. Similar controls are available for individual projects and participants.

Do not use this unless you really are having problems with costs slipping in unnoticed. Force Approval creates a great deal of extra administrative work.

Costing Center Links

This is an optional table defining URLs and titles to be shown on the web costing center home page.

Enter the URL (e.g., http://www.marinres.com) in the left column and the site name (e.g., Marin Research) in the right column.

Web Costing Center Logo Setting

The URL of the logo file will be shown here. It is set with the SetLogo Action which is displayed at the top of this form when you display the form from a web browser. The logo cannot be set by a Notes Client, it must be done via a browser. Note that the logo is only displayed for browser clients.

Testing Web Operation

Open the Repository using your web browser.

If the repository database is properly configured, a link labeled "COSTS" should appear in the lower part of the center panel on the Repository Center home page next to the words "GO TO". Clicking this link should open the Costing Center database home page.

> Note: If this link does not appear or does not work, the Repository Administration form was not correctly completed. Revisit the Repository Suite, Observatory and Portal Setup instructions found in the previous chapter and check the Costing Center entry.

When the Costing Center home page appears...

Click on "Administration" to open the Administration View.

Click on the words "Cost Repository Profile". This will open the profile document for display.

At the top of the form is the action "WebHome."

Click on it.

This should display the Costing Center home page again. If not, then the "URL of this database" is not properly entered and should be corrected before proceeding.

Setting a Logo

When the WebHome action operates correctly...

Click on Administration and Cost Repository Profile again.

If you have a logo file (.gif or .jpg file) available, click on "SetLogo"

On the form, use the "browse" button to select the file.

Submit the Set Logo Form.

The system will reopen the Costing Center database with the logo incorporated in the center display area. You can repeat the SetLogo action as often as necessary until you get the desired picture.