Initializing the Repository Structure

Repository Setup - Profiles

At this time you should create your organization profiles, your program profiles and your participant profiles. When this is done, the system will be ready for the addition of your projects.

The following forms are covered in more depth in the Repository Users Manual.

Organization Setup

You should create a set of organization profile documents to which participants can be assigned. These will serve as logical home pages for these groups and will provide reports and summary rollup levels for time summaries and workload forecasts. Even in very large groups, you should create a minimal hierarchy using no more than three levels. Otherwise the hierarchy itself may become a barrier to easily finding information in the various views.

Note that there can be any number of "top level" organizations.

To create an Organization Profile do the following steps:

Notes client:

1. Select "Participants" on the Repository Center Navigator then select "create a new organization profile" from the participants navigator.

Web browser:

1. Select "New Organization" from the Create menu on the Repository Center home page.

then...

2. Select "[New]" to define a top level organization or "[subgroup of ...] and enter the name of the new organization or subgroup on the next line.

In each Organization Profile, you should set the User ID as the Name and Address book ID of the organization manager. We suggest putting a brief description of the organization, department phone number, etc. into the document.

3. Close and save the new profile document.

Repeat this process until the entire organization tree has been entered.

Program Profiles

These can be created at any time, but should be created before the projects that will be associated with the program are uploaded.

We suggest you limit the number of levels of the Program hierarchy to three or less. For most sites, just one level of programs will provide adequate classification of projects.

To create a new program:

Notes client:

1. Select "Projects" from the Repository Center Navigator and then "create a new program" from the project and programs navigator.

Web browser:

1. Select "New Program" from the Repository Center Create menu

then...

2. Select [New] or [subprogram of ...] and enter the name of the program or the subprogram level on the next line.

Set the UserID field to the name of the program manager.

3. Close and save the document.

Repeat until all required programs have been entered.

Participant Profile Setup

Whether Participants are created during project upload or manually, you must manually edit each profile to complete the setup. **Note:** The real person associated with the Participant Profile needs to be in the Public Name and Address book before making these entries.

In most situations, you will create the new participant profiles manually as follows:

Notes Client:

Select "Participants" from the Repository Center Navigator and then "create a new participant" from the participants navigator.

Web browser:

Select "New Participant" from the Repository Center Create menu.

Participant Name

Enter the name for this participant as it will be used in the project management application. We strongly suggest that the format be lastname <space> firstname. This will allow alphabetic sorting by last name, making information much easier to find.

Organization

Select the organization that you have previously created for this participant.

UserID for Participant

Each person has a name they use to login to the repository. This will be the User Name in the Person record of the Public Name and Address book. Within Project Gateway, this name is called the UserID and is entered several places including fields that are named UserID in the Participant Profile.

Enter the UserID for that participant.

Send Message to

You must enter the UserID or the email address of the person who should receive notifications about new assignments and overdue work.

Participant Timesheet Profile Settings

Edit the "Overhead Categories" if necessary. These have been preloaded from the setting found in the Administration document.

Put the UserID of the participant into the field labeled "People who can create timesheet." Any other people who should be able to create or edit this timesheet should also be entered. If no one is listed, then everyone will be able to create a timesheet for this person, but only the creator will be able to edit it.

If this person will approve their own timesheets, set the "requires approval" field to No and leave the "approvers" list empty.

If they require approval, set the "requires approval" field to Y and enter the approval UserID in the "People who can approve timesheet." You should enter at least two people here so that there is an alternate available if the primary approver is on vacation or traveling.

When a timesheet is submitted for approval, an email is sent to the first person listed which contains a link to the timesheet. Any of the people listed can actually approve or reject the timesheet, but only the first person is automatically notified. So it is required that the first person listed must have a valid mail address in the Name and Address book .

Timesheet Initiation

Set this to "By User" for a person who should do timesheets, set to "Not Allowed" if this participant is a skill name or other placeholder resource.