Upgrading Existing Databases

Overview

A Notes database consists of design documents and data documents. Using a Notes Client, is it relatively simple to replace the design of an existing database with a newer version of that design. You must have Designer rights to the database to do this.

The Project Gateway 6 Repository Center design can be used to replace existing Project Gateway 5.0x designs. Keep in mind, however, that many of the new features require additional information to be added to existing data documents after the design is upgraded.

Before you begin, make sure that all outstanding timesheets have been submitted, posted, and costed. Also be sure to disable all scheduled agents.

One of the problems that we have seen in past updates is that administrators will make copies or replicas of the existing database onto other servers, but forget to disable the schedule agents in those databases. As a result, users start getting emails about overdue tasks that they have actually finished, missing timesheets that they submitted, missed document approvals, etc. Because all the project and task names are correct, this can become very confusing!

So, remember to check the "disable background agents" option in the database properties for any copies.

Preserving your existing design customizations

THIS IS IMPORTANT

If you are using a modified version of the Marin Research design then you should create a new empty database and copy into it all the design elements that you have modified before you make any changes. This would consist of your new forms, views, agents, navigators, subforms, shared fields and scripts plus any of our standard forms, views, agents, subforms, sharedfields or navigators that you have changed.

It is important to get a complete collection of all these components before you begin to upgrade the design because some or all of your modification work will be lost when the new design elements replace the existing ones.

Design elements that are not explicitly marked "Do Not Allow Design Refresh/Replace to Modify" in the design properties will be replaced. However, certain documents, such are the Profile forms and Assignment form have extensive internal changes in PG6. Therefore, you should install the PG6 version and then reintegrate your changes to it, rather than preventing the replacement.

Replacing your Repository Design - Notes R5/R6

BEFORE YOU BEGIN

MAKE A BACKUP COPY OF YOUR DATABASE FILE ON ANOTHER SYSTEM. THIS SHOULD BE A COMPLETE FILESYSTEM COPY, NOT A NOTES DATABASE NEW COPY. DO NOT PROCEED UNTIL THIS IS COMPLETE. YOU MAY NEED TO RESTORE THIS FILE!

Note: If you do not have access to the server and cannot make a file copy, make a local replica of the database. This will require a workstation with lots of available disk space!

Move the just created local replica file into another directory and disable replication of this database.

If you need to do need to restore the original database, delete the server copy and then create a New Replica on the server starting from the local replica copy you have saved.

DESIGN REPLACE PROCESS

1. Open your existing database with the Notes Designer client
2. Open the "... Other" section of the "Resources" section of design elements and select "Using Database" Document. Right click or use File/Document Properties will bring up the design document properties box. Click on the third from the left tab. Remove the checkmark shown on this tab next to "Do not allow design refresh/replace to modify."
3. Click on the "About Database" Document and remove the same checkmark.

   Click on the "Icon" and remove the same checkmark.

   Please double check the previous three steps, if you don't allow these items to be replaced, the database will identify itself as the old version which will cause considerable confusion.

4. If there are specific modifications to the design you know you want to retain, verify that these design elements have the "Do Not" checkbox checked. Note that if retain your version of a design element common to both databases, then you will need to manually apply our changes for that design element in your database.
5. Select the Repository Center database design provided with this release.
6. Use File \ Database \ New Copy (check "design + acl") to make a copy of this design. Set the file name extension to be ".NTF"

7. Open this NTF file. Use the command File \ Database \ Properties. Under the fourth-from-left tab, check the option "Database is a Template" and enter a name such as "PGV600." You have now created a template from the release database design.
8. Open your existing database. Use the command, File \ Database \ Replace Design. In the dialog box, find the Project Gateway Repository Center Database template you have just created. Press About... to verify the version and release date.
9. Press Replace. The process may take several minutes.
10. Add the Roles [PGADMIN] and [PGMASTER] to the database access control list if they are not already there. The PGADMIN role must be assigned to repository administrators.
11. Switch to the Repository UserID that you have created for this application as described in the the Installation chapter. This ID must have both the PGADMIN and PGMASTER roles in the database. It must also have the right to run unrestricted agents (be listed in the "run unrestricted agents" field of the Agent manager section of the server document) for the server where the background agents run. It should not be your personal User ID.
12. Open the Administration client. Select the server where your existing server resides and then select the database. Under the Database Section of the Tools, select "Sign..." and then OK. This can take several minutes.

Updating Information Documents

In your database, go to Reports, All Documents In Database View. Collapse the view.

1. Delete the existing *Graphics\Template* documents in your database. Go to the Repository Center All Documents In Database View, Graphics\Templates. Select the documents in this category. Edit Copy. Return to the All Documents In Database view in your database. Edit Paste.

2. Copy the *Online Guide* documents in the Repository Center Design and paste them into the All Documents View in your database.

3. If you are upgrading from and earlier release of PG6, copy your Schedule templates, process definitions, methodology topics, and document type definitions. (All of these are found in the Project-Processes view)

Updating the Repository Administration (Field Map) Document.

Find the section entitled Field Map. Expand the Category. Double Click to Open the Document entitled "Field Map." Or click on "open the repository administration form" from the Reports Navigator panel.

Go to Edit Mode. Scroll to the Section labeled "Security". Change the setting from "Normal" to "Full" then back to "Normal." Now Close and save the document. The purpose of doing this is to allow the new fields in this version of this document to compute default values that are needed for the current release operation. Opening and close the document does not cause recomputation, you must change something, even though you change it back to the original value, to force the Notes Client to recognize that you have made a change so that it will ask you if you want to save the new version.

Depending upon the version from which you are upgrading they may be some new option settings in this form. You should review the setup instructions found in this manual and then make the appropriate settings for you site. Following the instructions found in the chapters entitled "Configuring your new Repository" and "Timesheet and Document Customization" to properly complete the process.

Updating Existing Profile Documents

There are many new settings in Project Gateway 6, particularly in the Project Profiles. Open each existing profile document, force some minor change (add/remove a space from the user id list for example), close and save each document. This will take some time, but will ensure that at least the default settings are in place for each project. Ask each project manager to review their project profiles, particularly the policy settings.

Activating the Updated Repository

Follow the instructions for new repository setup found in the beginning of this manual for agent activation.

Reintegrating your design modifications.

View Changes

If you have modified versions of standard Project Gateway views, you can generally replace the Marin Research view with yours. Be particularly careful not to replacing any PROJECT GATEWAY view that has an alias name. Those alias names are used in formulas and agents. Many parts of the system can fail when required views are not found.

Hidden views (those whose name is in ( )'s at the end of the view list) must not be modified. They are used widely within the Project Gateway application, agents and API code.

Form Changes

If you have modified a form, then you should reinsert those changes into the new release version of the form. This is much easier if you have put those changes into subforms!

Navigator Changes

When you have made a modified version of an existing navigator, compare it carefully with the newer ones. Because PG6 supports both Web and Notes clients, many of the navigator formulas contain @if (@IsMember("$$WebClient;"@UserRoles); formulas to define different actions for the two clients.

Note that there are two "Repository Center" navigators, one for Web clients and the other for Notes clients.

Subform Changes

Review any changes to the PG6 subforms carefully. Most of them are used for security and should not be changed.

Agent Changes

Use the PG6 release versions of all agents.