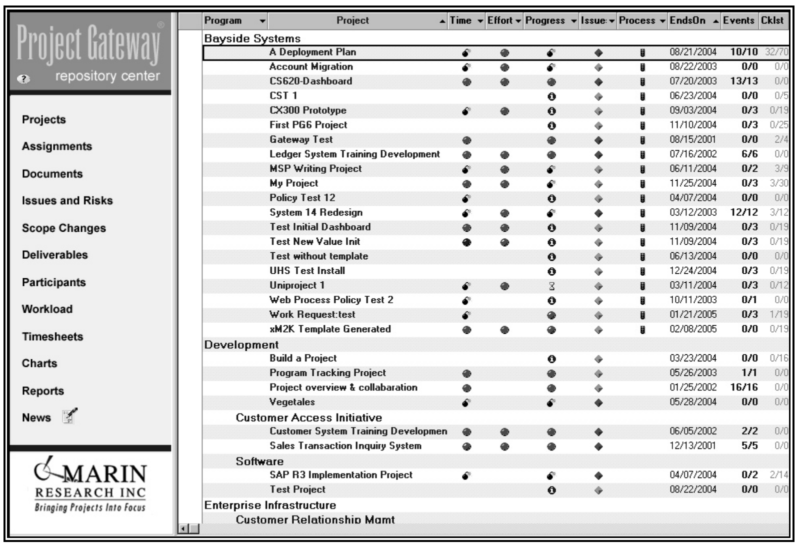
Using Repository Center from a Notes Client

Introduction



Repository Center appears when a Project Gateway database is opened. The left panel is the Repository Center Navigator and the right panel contains the project dashboard view.

The Repository Center Navigator provides access to all of the information in the database.

The subject categories on the left side are linked to subject matter navigators that provide access to document views and actions for creating new documents.

Clicking on the **?** will display the Online Guide showing specific instructions provided by your system owners.

Note: At the top right corner of the repository center is a trademark icon that switches to the Notes Folders format. To reactivate the Repository Center Navigator, close and reopen the database.

Using the Repository Navigators

Each of the subjects on the Repository Center Navigator opens another navigator page offering related views and forms. A "home" action located at the top of each of these secondary navigators on each will switch back to Repository Center.

Note: When you are using a Notes Client, the new navigator is displayed and a preassigned view is opened (usually the first one listed).

Projects Navigator

This provides access to Projects, Programs, and Process definitions It opens to the Project Dashboard which showing the status of all projects.

Project Profile documents are created for every project in the repository. *Program Profile* documents are created to help organize your projects into logical families.

Project Assignments Navigator

This provides access to the views of assignments organized by date, project, outline, and provides the ability create new assignments.

When selected, it opens to the "Assignments by Person, All by Date" view.

Documents Navigator

This provides access to Project Documents and Discussions.

It also provides actions to open your Journal, and to generate a report showing documents being reviewed and documents requiring your approval.

Project Documents are create as part of your work such as specifications, reports, engineering drawings, and analyses.

Discussions are subjects that you what to bring to the attention of your group, but which do not have specific due dates or project association.

Your *Journal* is a note-taking document that is unique for each user.

Issues and Risks Navigator

This provides access to Issue and Risk documents.

Issues are created to spotlight problems that require action and need comment from the team. Risks are created to identify problems that you anticipate, but which have not yet actually occurred.

Scope Changes Navigator

This provides access to *Scope Changes* that are created when the goals or content of a project need to be changed.

Deliverables Navigator

This provides access to the Deliverables Dashboard and to create deliverables for management reporting.

This also provides the control of standard checklists that can be used in deliverables, projects, and assignments.

Participants Navigator

This provides access to Participant , Organizations and Team Profiles.

Participant profiles provide security, timesheet, and automation settings for person who uses the system.

Organization profiles provide a structure for organizing participant work to reflect your company structure and provide reports of activities and responsibilities of the members of these groups.

Teams provide a way to define as set of participants that can be assigned as a single item to have ownership of a document or participation in a review. Teams can be cross-organizational.

Workload Navigator

This provides access to views showing planned and actual work for every individual, organization, project and program.

The navigator is time sensitive so that the views provided always reflect the current year. If an error occurs when selecting this item, contact your system administrator because an annual update is required.

Timesheets Navigator

Here you find the controls to create Timesheets and Charge Slips.

Timesheets allow you to report actual work time on a weekly basis for all of your tasks and overhead categories. They also provide a convenient way to update the checklists of your individual task assignments.

Charge slips are used for billing non-timesheet work and expenses.

Charts Navigator

This provides access to the automatically generated charts that show schedules for individuals, departments, programs and projects. This also displays calendar format views showing Issues and Key Events for the entire repository.

More specific calendar style reports are provided by the Todo actions on the subject profile documents.

Note that this collection of features in located under the Reports->Gantt item of the left menu panel when using the system from a web browser.

Reports Navigator

This provides access to a few of the reporting capabilities of the system and to the administrative controls. The navigator opens to a view showing documents that have system assigned numbers.

Here you will find a set of views showing performance measurements, Dependencies, and database administration.

On this navigator is a special item, "Open the repository administration form". This opens the a document that contains all of the global system setting. The administrator of the system will use this function to customize the system behavior for security, timesheets, issues, project documents, scope changes, and for setting up connections with the other component of the system.

Using Repository Views

Each view provides a table that lists one or more documents. Clicking on the title of the document will display it.

Using the right hand scroll controls will allow you to see all of the documents in the view.

Some of the views may extend wider than your screen. To see these, use the command "View - Horizontal Scroll Bar" from the Notes menu.

Many views are presented in a hierarchical format. Headings that are preceded by arrowheads (called "twisties") will expand to show subheadings and eventually to individual documents.

By using the "Collapse All" command from the Notes View menu you can see the top level headings.

Many view columns have up/down arrowheads next to the column title. These cause the view to be sorted using the information in that column. Note that, whenever a view is sorted in this way, the "grouping" headings that you normally see are hidden.

Using Documents

All documents open with Action buttons at the top of the form. The set of actions available depends on whether the document is opened for reading or editing. They may also depend upon your responsibilities with respect to that document. For example, you cannot, in general, edit an assignment document unless you are the assignee or the manager of the project which owns the assignment.

To create a document of a particular type, you should use the "pencil and pad" icon that is shown on the appropriate navigator or on a action button at the top of the current.