

Project Gateway(R) 6

Release Candidate Notes

September 10, 2004

This is the Release Candidate for Project Gateway Version 6.0.
It may or may not be identical to the final release, but we anticipate very few additional changes.

Changes from the 7/23 prerelease:

The new implementation of the graphics agents are now included. This replaces the previous 7 agents with two new ones. The new implementation is MUCH faster, particularly when generating project and program charts with many summary levels and removes much of the file manipulation which sometimes left temp files on the server.

About 50 fixes and minor feature changes are incorporated. Checklist tracking and process tracking now work correctly in all cases.

Compatibility:

Version 6 is a major upgrade and revision of the Project Gateway system which is intended for deployment on Notes 5 to 6.5 servers.

We have provided two versions of this database.

The first compiled in R 6.5 and distributed in ODS43 (R6) format.

The second was replicated to an R5.12 server from the first and script libraries were recompiled. It is stored in ODS41 (R5 format).

The PG6 design is backward compatible with existing PG 5.12 databases. We do not anticipate that any significant problems will occur when a 5.12 database is updated to the new design.

Extended capacity in Notes 6 for web operation. It is our experience that selection droplists, which are limited to "64K" in Notes are not limited when accessed from a browser. We have seen selection lists of over 5000 projects that worked correctly.

Documentation:

The PG6 manuals will be made available within the next two weeks. In the interim follow the documented PG 5.1 installation procedure. Call Marin Research if you have any questions.

Upgrades:

1. First create file system backups of all existing databases.
2. Make sure that all locally modified design elements are properly marked to prevent design replacements. However, any changes you have made to the assignment forms or profile forms should be manually reapplied to the new designs. These forms have been extensively updated.

3. Make sure to clear the "don't replace" flags on the About Database and Using Database design elements, otherwise your new database will announce itself with the old version.

3. Create templates from the new designs and apply to the existing databases.

4. Sign all databases and schedule the agents on the proper server.

5. Reapply any site specific changes to common forms.

Major New Features of PG6

1. Schedule Templates. These allow you to predefine project workplans, or parts of workplans, and easily reuse them for new projects. The template facility includes tools for the interactive construction of templates and for the generation of projects based upon these templates. The template editor is web based, the deployment facility is both Notes client and web operable. Templates can be created directly from existing projects.

The feature that makes this template system really nice is that the templates are scaleable. This means you can pick the start and end dates and effort for your project or project segment, and the template will be stretched or shrunk to fit your requirements. You can also use templates to generate parts of a project rather than the complete schedule. Resources are assigned in the template by role, and then the actual people are selected when the template is used. If you don't like what the template has created for you, you can undo and redo at any time.

2. Project Process Management. This allows you to define standard management approval processes that projects must follow. A process is defined as series of signoff gates that must be passed as the project progresses. The system includes forms for signoff and process definition, automatic monitoring of process compliance, and reporting. All functions are both Notes Client and Web enabled.

3. Group Review. This new facility allows for the collection of comments about a document or project. The system provides a mechanism for sending review invitations and for collecting comments. The document being reviewed is not modified by the review process. When a review is initiated, the user can provide review instructions. A team can be used to define the reviewer list. Both "by invitation" and public reviews are supported. All functions are both Notes Client and Web enabled.

4. Formal Project Document Approval. The system now provides for the formal approval of each completed project document using a list approvers selected by the project manager. Approvals can be done parallel or in sequence and have a time-out reminder.

5. Assignment and Project Checklists. Every assignment can now contain a checklist of expected results. Checklists can be customized for that assignment or selected from a list of predefined checklists. Checklists can be updated at any time to reflect progress. Incomplete checklists can cause the creation of project issues.

The great benefit of checklists is that they allow you to reduce the number of tasks without reducing the precision of progress reporting. By reducing task count you reduce the time spent in

estimating, scheduling, schedule revision, and correcting reporting errors. You also reduce the effort of your users in reporting task effort.

Each checklist has an associated log that shows when an item is checked and by whom. When an item is incomplete, a reason is recorded. Checklists have provision for the third party verification of accomplishments.

Checklist updating is incorporated into the timesheet process. When you submit your timesheet, you will be prompted to update the checklist for each task on which you have spent time.

6. Selective time reporting. You can now choose, on a project by project basis, the degree of timesheet reporting that is required. There are three basic choices. Task level reporting, Project Level reporting, and No timesheet reporting. You can create combinations for special requirements.

The new project level timesheet reporting feature simplifies the timesheet process by providing a single line item to record all the work time spent on a single project. This is particularly useful for support group people who work on many projects in a single week.

There is a new class of simplified assignments for projects that do not require timesheet reporting. They have only start, finish, and percent complete. Plus, of course, provision for a checklist.

A new interactive reporting mechanism called a "Checksheet" is used to capture checklist accomplishments and task activity for non-timesheet tasks. Checksheets provide an socially acceptable way of gathering progress information from people such as teachers, doctors, scientists and managers who will not use timesheets.

You can use a checksheet from both cell phones and PDA's with web browsers.

7. Project Logs

One of the newest techniques of project management is the creation of a weblog or "PLOG" for the project. The Project Gateway project log is a dynamic web page that displays project items in reverse chronological order. The log shows titles and brief summaries of project documents, issues, risks, scope changes, signoffs, completed milestones and project level checklist items. To this users can add personal log entries and open project specific discussion threads. The log display can be instantly filtered by contributor and document type. Items with response threads have links to open the thread details.

The log can be opened as a web page or viewed through any standard RSS Newsreader. Using a newsreader allows you to quickly see the latest activity in any number of projects. Notes users can also participate in the project log.

8. Rescheduling.

Designed primarily for projects that do not use Microsoft Project, the rescheduling facility allows you to change the dates of all unstarted tasks in a single operation. This facility operates like a set of power tools. You choose from a selection of options that include sliding the project sideways in time, moving overdue tasks to a new restart date, adjusting resource effort levels, and honoring or

not honoring dependencies. Then the system creates a proposed schedule and shows it to you as a "before and after" Gantt Chart. If you like the result, you can tell the system to implement the proposed changes. If you do implement, but then have a change of heart, you can undo the changes. This is particularly useful for projects that have been on hold for a while or which need to be pushed out to some future date.

9. Extended Reporting. Gantt charts can now be made of documents and processes as well as task assignments. You can create custom subsets of project milestones and then combine them into program level Gantt charts. Assignment charts show task dependencies. There are new reports for process monitoring and document review. There are new personalized reports such as "my approvals" that show everything that is waiting for your approval in the database. Timesheet exporting now incorporates the archived timesheets.

10. The New Web User Interface.

In addition to the obvious change in appearance, there are four key features built into this interface.

First, the menus cascade to allow you to select any view or create any document type in the database with a single selection.

Second, the Recent menu provides one-click access to the last 10 documents, reports and views that you have created or opened. This is incredibly convenient and saves a great amount of time.

Third, you can customize the central panel to show your calendar, a customized dashboard of your favorite projects, project logs, news, assignments, etc. This information updates automatically.

Finally we have integrated search into the interface. You can simply enter a phrase and click to find all documents in the repository or one the web. Several advanced search options are also provided.

Other Features:

Those are the major new features of this release. However there are many other changes that are less dramatic, but still very useful. Some of these are listed below.

1. Projects can now defined a set of "activity" codes. Project documents can then be coded by activity. This is handy for integration projects that encompass a number of more or less separate subprojects.

2. There is a new "help" mechanism on project documents that is tied to the document tracking code. Not only will this button provide access to prewritten support information, but it will also provide a way to get a link to all previous examples of documents of this type in both the repository and archive.

3. Project documents can now be "checked out" by both Notes and Web users. Previously this feature was web only. A document which has been "checked out" is reserved for the private use of the author. A placeholder appears for everyone else telling them that the document is temporarily unavailable.

4. The data panels that can be configured into the web home page can also be created for the use in cell phones and PDA's, web portals, and in the custom windows of your Notes home page.
5. The document type of an existing project document can now be changed.
6. There is a new "Date Dependency" feature to tie a milestone to a required date.
7. Checklists can be imported from MS Project Plans.
8. Templates can generate MS Project files.
9. Programs can force projects to use particular processes. Program managers can be automatically notified about process exceptions.
10. The new menu system allows for the possibility of different menus based upon user roles.
11. The project archive process has been made much, much faster.
12. The timesheet export process has been made much faster.

Under the hood.

All of the major forms have been extensively modified, especially the project and assignment forms. All the shared fields have been removed.

Every change released in the PG 5.12 service packs is incorporated into this release.

There are 124 new forms. 10 new subforms. 10 new views (plus new timesummary and forecast views). 31 new agents (2 of which are scheduled agents). 9 new script libraries.