

Update Notes Version 2.1

This chapter describes the update process to MindPlan Version 2.1.

Unlike the previous practice of simply exchanging application and database design, the change to version 2.1 requires a little bit more manual work.

1 Installation of the Application via the Installation Database

Please make a complete backup of your MindPlan data prior to the update. Please refer to the FAQ section of the MindPlan homepage for further details on how to do this:

http://www.mindplan.de/mindplan/hwMindPlan_en.nsf/id/pa_faq#backuphints

Start the updating process as usual by opening the 2.1 installation database. Choose "Update Installation" and follow the instructions on your monitor.

Existing MindPlan installations will be uninstalled prior to the installation of 2.1. Your MindPlan data and configuration settings will not be deleted at this.

2 Updating the Database Design

Carry out the design update after completing the installation of the application, online help and design templates.

3 MindPlan Configuration database

Now open the MindPlan configuration database. The filename is "wconfig.nsf" and is located in the "mindplan" folder of your Notes data directory with standard installations.

3.1 Add the Meeting Management Nodes

Now carry out the agent "1. MindPlan update 2.0->2.1\Add meeting management nodes" in the configuration database.

It will amend the meeting management nodes in the database. These are agenda, agenda item as well as minutes item of the meeting existing already in the previous version.

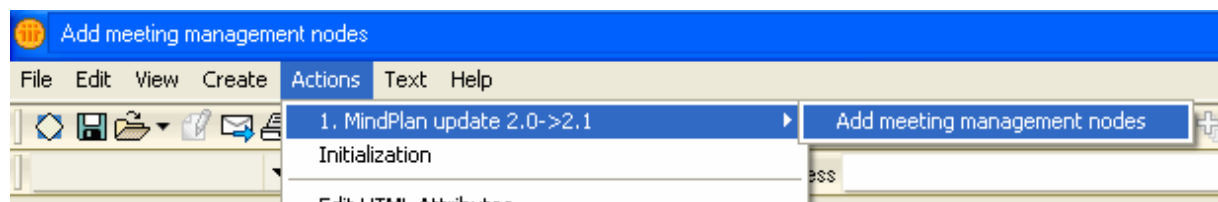


Illustration 1 Adding the Meeting Management nodes

3.2 Amending the Personal Documents

Now open the stored personal documents, if any. With the new authorisation system it is necessary to store the complete Notes user name in the MindPlan configuration for persons that a Notes-ID is available for.

I.e., the person "Ray Ozzie" will necessitate the specification "Ray Ozzie/Microsoft/COM".

On the bottom right of the personal mask you will find an according field for the Notes user name. With the adjacent cloud symbol you can search the address book automatically to determine the appropriate name.

From now on the complete name will be offered for selection in the MindPlan application in place of the short name. Only this one allows for definite user identification for the new MindPlan authorisation system.

Illustration 2 Adding the hierarchical Lotus Notes names

4 MindPlan database(s)

In a final step, an update of the existing MindPlan data is required. Open your MindPlan databases one after another and carry out the following steps.

4.1 Preparation of the Authorisation System

Start the agent "1. MindPlan update 2.0->2.1\1st step: Prepare access rights".

It will amend all MindPlan nodes authorisation fields with default rights. Thus editing access is no longer required as the minimum access level to edit the MindPlan database, but only author access.

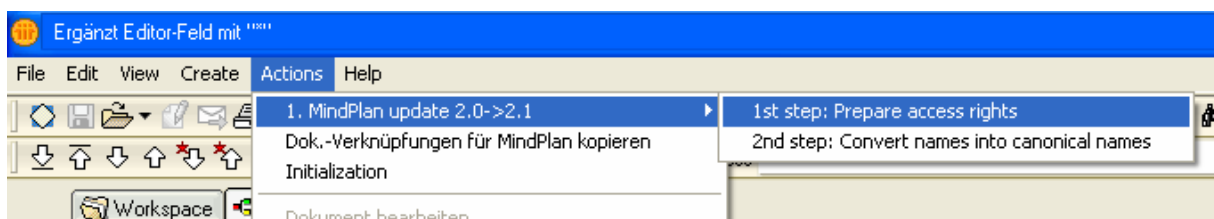


Illustration 3 Update agents in the MindPlan database

4.2 Amending Resource Fields According to the Configuration

Now carry out the agent "1. MindPlan update 2.0->2.1\2nd step: Convert names into canonical names".

This agent will analyse all name files of the MindPlan nodes. It will attempt to determine the full user name from the MindPlan configuration database with the help of the field content, unless a complete Notes user name is available.

The agent will query you on ambiguous names, which cannot be located. You now have the choice to enter such a user name yourself or to leave the short name.

Please note that MindPlan definitely continues to support free text entry in the activities resource field. I.e., the field content need not be altered if you work with external project resources without Notes-ID.

The name conversion described here for hierarchical names does expedite the unique user identification with Notes-ID though, and it is mandatory for instance for the project leader field if the authorisation system in a MindPlan is activated. The person will namely automatically receive editing rights for the entire MindPlan, which only works with a complete user name.

You have now successfully updated MindPlan to the version 2.1.

We hope that you enjoy our product!