



OEO CMM 2+ in 2001

Odin Work and Issues

The OCAB Team

(Tim Gill, editor [for now])

Preface

- Purpose:** *To identify the work (and the priorities for doing that work) that needs to be addressed by the OCAB Team to make Odin be more usable for the OEO user community. This includes small and large configuration changes, desired enhancements, known problems, bugs to report to Xerox, suggestions from the OEO user community, and any other issues that the OCAB needs to track about Odin administration.*
- Audience:** *OCAB Team.*
- Authors:** *OCAB Team—the document is writable by all members of the [OCAB](#) group in Odin. So it has shared authorship, although the editor will (try to) maintain the overall structure.*
- Structure:** *This document is an attempt to have a single place where the OCAB work is tracked, a place that all OCAB members can see current work (and problems and issues and bugs) that others have noted as well as add their own. How well it works in this regard will be judged later, but perhaps it can reduce some of the e-mail volume...*
- Use & Printing:** *This document can of course be printed, but since it is being structured to work as a collaborative web-based mechanism for the OCAB to track and organize its work. It will make good use of intra-document hyperlinks and will be updated relatively frequently. It may also get long, especially so the more the editor uses page breaks to increase the visual readability of the document. So the more typical usage will be to use Word® (or the Word viewing plug-ins available in your web browser) to view the latest copy and move around the document.*
- Versions:** *The document has been given 50 versions in Odin for now, so that we can have a record of updates (use Odin's history page for this document to see the updates made, who made them, and when they made them). This may be lowered in the future.*
- Version Status:** *Since this document is tracking work, issues, and priorities, there is really no status (like Draft or Final) associated with it. Check the date in the footer to see the date on which the version you are reading was last saved.*
- This version, version 2, is diffmarked with the original version.*
- Update Process:** *To make shared authorship work, we need to follow some guidelines on updating this document. These process steps may evolve, but for now:*
- *Lock the file in Odin so others don't overwrite your changes. Keep it unlocked for as short a time as possible (e.g., write a new section as a separate document and use cut-and-paste to move it).*
 - *Let the editor make major organization changes; send [e-mail](#) if you want such changes.*
 - *Use a sub-section like "3.4.1 Viewpoint: John Smith, Jan 1" to add comment to a topic ([§2.6.2](#) is an example).*
 - *Help the reader by using hyperlinks to other docs, especially ones in Odin! (highlight the text and use Insert → Hyperlink to insert the link).*
 - *If you have added any sections to the document, then before saving and checking it back into Odin, update the Table of Contents (place your mouse somewhere in the ToC, then press F9 → Update Entire Table → OK).*

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1. Priorities and Work Item Ownership

[Editor's note: Based on discussions at the July 31 and August 13 meetings, I have entered the work items ~~that seem to~~ whose priorities we agreed to be the highest ~~priority~~ into this table so that we can better track our work and progress. Please let me know if this format works for you or not.]

#	Priority	Rough Estimate of Effort in Dedicated Work Time	Description <i>Include a hyperlink to notes further down in this document, as well as any separate document for the effort.</i>	Owner	Team	Dates <i>(do we care?)</i>				Comments
						Conceived	Started	?	?	
1.	1	2-3 days	Re-write the SCMKPA Team's requirements on Odin for baselining and work with them to come to agreement on something we can implement. See the notes later in this document. See the separate document on this effort.	TimG	PaulG	2001/05/17	2001/06/20			Version 2 published August 6. Need to consider the release-based hierarchy work item in doing this.
2.	2	10-15 days?	User interface changes to support baselined documents	PeterC	PaulG, TimG	2001/06/20				Depends on getting to agreement on the requirements for supporting baselined documents . Peter was given some mini-requirements for a prototype on August 15.
3.	3	?	Support some sort of access restriction to the contents of Odin, mostly to prevent "the field" from seeing HP-UX development information,	PeterC	?	2001/03/01				There has been a lot of discussion of this, but I think the team has agreed at least once that an LDAP mechanism that lets one access Odin as an Odin guest, or to login with an Odin account—as long as one is not in a "field" organization, as determined by the LDAP-based access mechanism—is the right way to go. Let's not keep talking about the "get everyone Odin licenses" approach. —Tim [see my notes on this]
4.	4	5 days	Auto-generation of PDF files. See the notes later in this document.	PeterC	MichaelT	2001/01/01	2001/01/01			This item also affects the release-based hierarchy work item.
5.	5	?	Provide a mechanism to automatically generate a release-based hierarchy (set of collections and documents) at the top level of Odin.	SteveR	?	2001-03/01				

2. Primary Work Items and Issues

This section contains sub-sections for each of the primary work items and issues that the OCAB members have identified as needing to be addressed by the OCAB. There is a 2nd-level subsection for each item or issue, and those sections can contain 3rd-level subsections to identify individual member's comments on the item or issue.

2.1 Collection Hierarchy Re-architecture

The first big effort of the OCAB, led by Steve Roth, was to get the top levels of the folder organization of Odin re-architected, and the conversion for that was done in mid-June. If no the cleanup of any remaining small problems is done, this item can be moved to the [Resolved Issues and Work](#) section

2.2 Release-Based Hierarchy

Part of the re-architecture of the overall Odin collection hierarchy that Steve proposed included a “release-based” collection tree. But this was deferred during that work to a later time for several reasons. It remains an item of work that needs to be done. There are a number of issues to resolve before it is implemented, including basic definitions of some terms and of what is wanted. The implementation will most likely be related to the requirements for and implementation of the baselined document mechanisms, and so the two efforts should be done together to some extent.

2.3 Document Baseline Requirements from the SCM KPA Team

The OEO SCM KPA team provided an initial set of requirements on Odin for the baselining of documents. The OCAB needs to provide feedback on these to help us both arrive at clear and complete—and doable in Odin—requirements for this. This aspect is important to various procedures and templates that have been identified as needed for the SCM KPA work. See the [document](#) Paul and Tim are working on for this; it is getting closer to completion but still needs work.

2.3.1 Access to Odin Documents by NEC, Hitachi, and Other Partner Company Developers

Note, too, that an important requirement that must be met here is that the partner company engineers that collaborate with HP engineers on HP-UX development (NEC and Hitachi at this time, but probably more in the future) have to be able to access some of the documents in Odin. Currently, such access to documents is granted on a URL-specific basis, using ACL's. This capability must be at least maintained, and possibly enhanced, when working with Odin.

2.4 User Interface Changes to Support Document Baseline

The document Paul and Tim are working on for the requirements on document baselining contains some *Implementation Notes* that helped the authors formulate the requirements in their mind, and if we proceed with an implementation of that sort, this work will require some customizations of the DocuShare interface for supporting baselined documents. Such changes might include the definition of new DocuShare objects, actions, and attributes. How this work would be done and who would do it, once it is defined, needs to be addressed.

2.5 Odin Scaling, High Availability, Mirroring, and Backups

This issue came up again at the 18-Jun-2001 meeting and was added to this list.

2.6 Feature Scalping from Other HP DMS Systems

This issue came up again at the 18-Jun-2001 meeting and was added to this list. There are other document management systems in HP that we should learn about, including customer reactions, and then borrow/adapt small features from them. Let's start with SNSL's and contact Steve Burke.

2.7 Fixing the Flaws in the DocuShare Windows Client

OCAB members tend to like the DocuShare Windows client and its Windows Explorer-like interface, but there are various parts that need fixing for cooperative use in Odin, including its failure to prompt for attributes when a new document or other object is added to the database via its interface. It also needs to access the Odin-specific custom data. Generally, any Odin-specific policies need to be enforced.

2.8 Security & Access Control, and Login and Group Administration

From the beginning meetings of OCAB, we have talked about the general problem of security and login/group administration, without any more specific statements of problems or requirements for solving those problems. Suggestions of using the HP Corporate LDAP database to make this easier (automatic creation of logins and perhaps groups for OEO staff, etc.) have been made but no OCAB member is an expert in LDAP and we have been busy with other stuff.

Note that OEO works closely with some partner companies—currently NEC and Hitachi—in developing HP-UX; these partnerships are managed by EIAL. ClearCase and document access is provided to developers who work for the partner companies on site in New Jersey as well as in Cupertino and Japan, within appropriate HP Corporate Security guidelines. **Any access restriction mechanism must continue to allow selective access to documents in Odin to these engineers.** This [requirement also affects the baselined document requirements](#) work item.

2.8.1 Viewpoint: Alice Wang, June 20

Alice's lab SNSL has their own DMS and it uses LDAP authentication successfully and she would like to take part in our discussions.

2.8.2 Viewpoint: Tim Gill, June 18

The week of June 12 Steve Roth suggested this was more urgent and a mail thread on the topic began. My concern with the direction of the thread is primarily with the proposed solution involving group access restrictions based on Odin logins, but also the vagueness of the problem.

Assuming that the problem is that “the field” (Sales or Marketing?) has to be prevented from seeing some or all of internal OEO development documents (and we do not know if this is the entire case, even though this is what people cite), I think that basing access restrictions on Odin logins and groups is the wrong approach. The basic problems with this approach include

- You must have an Odin login to read these documents, even if you need to. This puts a burden on people who should not have the burden.
- Groups are definable by users and we have no mechanism to automatically make Odin groups model the real-world organizations (project teams, sections, labs, etc) that are likely to be the “approved for reading” set.
- We will encourage “you can't read my document” thinking among OEO staff themselves.

Yes, we could have anyone with an Odin login belong to the largest group, and that group has read access to everything, but this approach leaves out all other HP staff who we may not want to restrict from learning about HP-UX work, or other things stored in Odin—this violates the Rules of the Garage (“*Work quickly, keep the tools unlocked, work whenever*” as well as “*Share—tools, ideas. Trust your colleagues*”).

On the other hand, if we use LDAP to restrict access based on the part of HP one works for, we can restrict the Sales and Marketing staff simply based on one's “corporate e-mail address” and allow all OEO staff (and other non-restricted non-OEO staff who want to learn more about HP-UX development) full read access. The exclusion criteria can be augmented with exception lists, as needed, even down to an individual.

Whichever mechanism is used, I would think that we want to allow it to work at the lowest level node at which we care about the security issue. This would allow all other documents to be readable by all, in the spirit of sharing. It would also preclude always having to “login” to see even non-sensitive documents.

2.9 User Documentation on Odin Policies, Configuration, etc.

The OCAB has discussed various topics, including policies and guidance that we want to communicate to users. And there are going to be various Odin-specific configuration and administration topics that are not covered in any of the DocuShare documentation. For these, Tim and others think we need an *Odin Users Guide* to complement the DocuShare guides. Tim has started a [document](#) that could be the basis for such a Guide.

2.10 Document Attributes (for Use with Searching and Scripting)

This topic has come up quite often, and we should probably tackle it coherently and not piece by piece when a particular need crops up.

2.10.1 Viewpoint: Tim Gill, June 18

Some quick thoughts from my notes:

- ▼ a *document type* attribute, to allow better searching (design docs vs. requirements vs. plans, etc); possible values include at least
 - plan
 - overview
 - investigation report
 - design
 - requirements
 - procedure
 - checklist
 - policy
 - whitepaper
 - overview
- ▼ an *HP-UX release* attribute (with some way to equivalence various names (halfdome/11.02 or whatever)
- ▼ use the same attribute names, values, and drop-down web form interface as CHART does, so users are more likely to be familiar with it

2.11 Auto-Generation of PDF Format Files (Acrobat)

2.11.1 Viewpoint: Tim Gill, June 18

I think PDF as an automatically generated derived format is needed for a variety of reasons. Issues around this include at least:

- ▼ resolving any license issues for the Acrobat Distiller Server product
- ▼ changes to Odin to support auto-generation of PDF just as HTML is now
- ▼ auto-generation on demand or when document is stored in Odin (or when author says so, though I don't think this is a reasonable option)
- ▼ going back and fixing places where both a Word (or other) and PDF file exists as 2 Odin objects, possibly different versions out of sync

2.11.2 Viewpoint: Tim Gill, August 7

As Steve Roth pointed out in some recent e-mail, another issue that auto-generation of PDF files would help address is "What format of a document does one reference in a hyperlink?" Most people are going to want to read documents, and Acrobat versions are probably preferable for most people.

2.12 Ownership and Locking

2.12.1 Viewpoint: Tim Gill, June 18

I don't have a lot of notes or thoughts on this yet, but have had some comments from lab members about wanting to avoid the problems we've had in ClearCase with file ownership and locking in this new Odin domain. There may be some overlap here with the login/group/security issue.

2.13 User Concerns

2.13.1 Viewpoint: Tim Gill, June 18

I have received a large number of concerns on various aspects of Odin from EIAL staff who are using Odin or eager to use it. I have grouped these by topic in [§5.1](#). Other labs must have feedback as well.

2.14 Platform Issues

2.14.1 Viewpoint: Tim Gill, June 18

I have had some concern expressed from EIAL staff about what come down to platform issues: "I don't use Word for Windows and don't want to read HTML, so provide everything in PDF format—it's the universal reading format", etc. There are also platform issues around browsers and how they are configured, about how hyperlinks work. Other ones are likely to appear.

What the exact problems are and which need addressing are not otherwise clear yet, but I think the area is one for us to address. Word 2000 vs. Word 97 might have some issues.

2.15 Ongoing Administration and Configuration

2.15.1 Viewpoint: Tim Gill, June 18

Is there anything about the current setup—an OCAB group working with the Odin administrator (Peter), regular meetings, consensus, helping out where one can—that we need or want to change for dealing with Odin administration in the long term? Will this be workable?

2.16 Strengthen Contact with DocuShare Support: Bug Fixes, Beta Programs, User Forums

We need to get more organized about working with Xerox more closely:

- reporting bugs
- requesting changes
- offering enhancements we have done
- beta programs
- user forums

2.17 Monitor the Health of the Xerox Corporation

Uh, what more needs to be said?

2.18 Multi-file Documents

A couple of PSAL engineers brought this topic up on August 15 with Paul and Tim. What kind of a problem is it? Does the OCAB or SCM KPA teams care how this is done? If so, do we want to add some mechanism to Odin to help with it, or process to the SCM KPA procedures?

3. Other Enhancements

- *[Gill, 12-Jun-2001]:* The meeting of the SCM KPA team today came up with a need to be able to analyze the failed searches that Odin users do. This would seem to be possible if Odin captured a log file of all searches done, and recorded at least the search syntax used (even if generated for the user) and the number of search results obtained—then the analysis could look at records with 0 results.
- *[Steve, Apr-2001]:* We need a custom DocuShare tool/widget/button to support creating URL objects instead of letting people do multiply-parented collections.

4. Minor Problems

This section contains lists of various small problems I have found with Odin that I think we should correct at some point

4.1 User Interface Appearance

- **[BEING ADDRESSED NOW]**
The Appears In line at the top should show a folder hierarchy, not just the parent. This will help people quickly assess where they are in the folder hierarchy.
- The top-level folder in the revised hierarchy would probably be easier to use, particularly for finding where to put a new document, if the ordering of the 6 folders reflected the rule-based guidelines for where to put things. The Components and Subsystems folder is the first one in the rules, and should be the first one in the folder (reflecting its importance as the new, non-organizational place to put HP-UX development documents).

In a related vein, the only folder in the new hierarchy to have the word “HP-UX” in it is the one folder (HP-UX Organizations) in particular where we don’t want HP-UX development documents to be stored. Perhaps some tweaking of names is needed here.

- Sorting order of search results? How does a user configure this?
- Sorting order of directories in general? How does an owner configure it? A user?
- The Group Services page for the group `Odin users` does not show the members in alphabetical order, nor does it show any of their attributes (like lab). It should be more useful.
- The User Services page for each user (their “properties” page) should have a field for the person’s HP web page, to increase our ability to get to know our remote colleagues.

4.2 Searching

- Need a quick search page or button that does a search on all attributes of a doc except full text, to reduce extraneous hits.
- Need a web search form in which I can enter the raw search syntax and hit a <CR> to have it processed.

4.3 Hyperlinks

- People have been asking me if there is a way to hyperlink to “all formats” of a document (the Word and HTML versions now, for example, but including PDF later if we provide for auto-generation of the PDF format), or to let the user configure which format they want to see. Given the variety of ways that a link can appear to a user depending on their browser, its configuration of helper vs. plug-ins, and other PC configuration (e.g., whether QuickView Plus is installed), such mechanisms would give users more control over how they see a document thread in browsing through Odin.

4.4 Auto-generation of HTML

- *[Tisdell, 18-Jun-01]*: The generation of HTML from PowerPoint fails to create some images at all if the image is large or complicated.
- The use of the intra-document hyperlink target syntax `#<section>` on an anchor tag (as in `http:abc.com/Glossary.htm#term11`) does not get generated properly from the Word hyperlink to the HTML (or to the QuickView Plus version either).

- The <TITLE> tag in the HTML generated from Word files seems to always be “1252” and this needs to be corrected.
- The HTML generated from Word, when Word uses 10-pt type, uses a font size of 2 (using the HTML 3.2 relative sizing mechanism), but this is too small. Sure, I can change it in my browser window, but then I am having to keep changing back and forth when I look at such HTML vs. look at other parts of Odin. The default should be changed somehow.
- If I use notation like View → Toolbars → Formatting to show a Windows menu hierarchy, the HTML generated by Odin replaces the “→” symbol with the letter “à” (a with an “accent grave”).

4.5 The “New!” Icon Appears Too Frequently

From: Tim Gill <gill@fpk.hp.com>
 Subject: Re: can't change doc titles in Odin w/o files being marked as "NEW"
 To: cho-dms@rsn.hp.com
 Date: Mon, 9 Jul 2001 16:11:42 -0400 (EDT)

Peter,

I think it's worth keeping for the serendipitous effects, since you may be interested in casually learning about a new or revised document, especially one for which you don't have a subscription.

The next time I edit the OCAB Work document, I will add an item to the "to do sometime" list the about tweaking this to only appear when the right level of change granularity is reached (probably a new object or a new version of a file).

Tim

Peter Cash wrote on July 5:

```
>
> There's no easy way to be selective about what gets marked new
> (i.e., the admin interface doesn't offer any way). I'm sure we
> could customize it somehow. We could simply turn the "new" icon
> off. Do we really need it?
>
> Peter
>
> Tim Gill wrote:
> >
> > OCAB,
> >
> > An EIAL user sent me the following question about Odin. I've
> > noticed it as well and don't particularly like the granularity at
> > which this "new" flag is set. It seems to happen if I change
> > not only the title but other attributes too, like Summary.
> >
> > Does anyone know if this behavior is changeable or configurable?
> >
> > Tim
> >
> > > If I change the Titles of those documents so they will sort
> > > correctly, it will mark all the files as "NEW". I don't want to
> > > do that right before the review--it might cause people to be
> > > confused (when they get subscription notices of "new" documents).
> > >
> > > I can ask the Odin administrator if we can turn NEW off for that
> > > kind of change.
```

I also note that if one places a lock on a file, this NEW icon is placed next to the document's title; that is really silly.

Here is another exchange on this topic:

From jcb@fpk.hp.com Wed Jul 18 08:20:34 EDT 2001
 From: Jim Blinn <jcb@fpk.hp.com>
 To: cash@rsn.hp.com
 Subject: Re: All documents marked as new -- DOCUSHARE ENHANCEMENT REQUEST

Peter,

Thanks for the explanation of the "NEW" marking problem.
 Please file an enhancement request with DocuShare:

- Maintain separate modification dates for Content and Meta-data
 - when content is changed, mark file as NEW (like now) and show this date to the right of the file name
 - when meta-data is changed, mark file with smaller icon that says "Revised properties" or "New meta-data"
 - "Revised Properties" would be more meaningful to the day-to-day user
 - Within the Properties, maintain the date the properties were modified (as a read-only field)
 - when meta-data is changed, prompt for a comment, so a history of meta data changes can be maintained (and maintain that history, too)
 - This meta-data history enhancement probably should be optional and controlled by the administrator (or could be selected by users)
 - This history enhancement could wait for a later release.

RATIONALE

- this will prevent the blanket addition of meta-data from making all files look like their contents have been changed (when some unknown operation occurs in the collection that triggers this)
- when any user makes a change in the meta data (like a change in the Title or Summary), that should not make people think the contents have changed

Thanks,

Jim B.

```
-----
> From cash@rsn.hp.com Tue Jul 17 18:41:20 EDT 2001
> Date: Tue, 17 Jul 2001 16:57:29 -0500
> From: Peter Cash <cash@rsn.hp.com>
> To: odin-users@rsn.hp.com
> Subject: All documents marked as new
>
> Some users have been reporting that all documents in a given
> collection appear to be marked as "NEW" and given a current
> revision date whenever they make a change to one document in the
> collection. I talked to DocuShare customer support, and they
> suggest that the reason for this is a new field I added to
> documents and collections just before the Odin content
> reorganization ("Associated OS Version"). Apparently, a change in
> the metadata counts toward marking the document as "New". It's
> not clear though why this only happens sometimes.
```

4.6 Miscellaneous

- Can I get a comment into the "history" list for the first version of a document, other than the current Initial Version?
- DocuShare will not find the "." in a search—it is a sentence terminator. So, having a pathname in a metadata field that refers to the file foobar.c, e.g., will not be found. How to fix this?
- Mail sent to me on subscriptions appears to come from the admin user (Peter). But I found some [release notes at Xerox](#) that state a way around this: "Email notifications sent by the DocuShare server will appear to be sent by the DocuShare administrator. To have a unique DocuShare sender,

create an email account specific to DocuShare and enter that email address for the DocuShare admin account.”

- When I enter a new document into Odin using Netscape, and I click the **Browse** button to bring up a standard Windows pop-up letting me select a file, the **Files of Type** field in that window always defaults to **HTML** and this is frustrating, since most of the documents I place into Odin are Word documents. How do I change this default setting in my browser?

5. User Feedback from OEO Labs

5.1 EIAL Users

The comments in this section are from individual EIAL staff members. I have grouped them into topics and ordered the topics alphabetically (except for Miscellaneous, which comes first). This input should be used to improve Odin as we address various issues. I would think other labs will have similar input as well.

5.1.1 *misc*

- A future goal: tie it all together—code, docs, defects!
- Can we get auto-keyword generation when a document is checked in?
- How many “significant” (Ha! What a word!) internal docs do we think there are for a release of HP-UX? Larry estimated 4-8 for each feature and 5- features in a release, so we’re talking 200-400 in that case.
- Like to see an overall “simple is better” guideline. For example, patterned backgrounds and animation should be avoided.
- Want our DMS to have easy tie-in to the DMS of other organizations. For example, a link to the language folks in particular would be helpful. Best if it appeared to the user to be one seamless DMS across all of HP-UX development.
- It would be nice if the source code and documentation were linked in some fashion such that “clicking” on a source file or maybe even a routine within a source file opens up the document(s) associated with that source.
- Many managers like to download their mail (with attachments) to their PCs for use offline (e.g., during travel, in hotels, at meetings, ...). If we have a policy of not sending documents as e-mail attachments, this will make their job harder. SUGGESTION: In response to this concern, you might add to the SCM requirements the need for a tool that people could use in conjunction with downloading their mail that would go off to Odin and download the Odin references in their mail. This is a subset of a general-purpose tool that would load any URL that is referred to in mail (I’m wondering if the Microsoft and Netscape mailers might already have this type of functionality available, or if a third party has developed such a tool). This requirement should have a low to medium-low priority.
- Can we get automatic dead link searching and notification? Can dead links exist in Odin?
- We all often have input into the delta doc/release notes for a release. If individual project teams had such input among their projects’ docs it would be nice to have some method to automatically roll those all up into the release notes.
- Reconcile the HP-UX man pages being in Jazz and other documents being in the DMS. It would be nice if a search for a string in the DMS would also find usage of the string the man pages.
- Like to see a special place in the DMS reserved for maintaining a glossary. Perhaps with some organization to it (e.g., technical terms, product code names, organization names).

5.1.2 *Baselining and Versioning*

- The versioning of docs needs to make sense.
- I’m concerned about version control in Odin for documents having a long life. An example is the kind of code-design explanation document that we have long needed for various sub-components of the kernel. Ideally, this document does not change a whole lot from release to release, but the changes need to be highlighted; and yet the whole thing should not have to be re-written for each release. How would such a document be managed in Odin?

- The Requirements Management Procedures require that all changes to requirements be associated with a CR, and (if jcb's suggestion is adopted), the 1st set of requirements will also have a single CR associated with it. This CR would be included in the corresponding update to the Project Plan, and needs to be incorporated into Odin when the revised requirements document is checked in. How is this to be done? How can it be required when a baselined doc is checked in? Can CR numbers be extracted from the document version comments in metadata of Odin for requirements management metrics purposes?
- Okay, but put down in your Document Management Process that diffmarked revisions for review are produced as well as cleartext.
- There needs to be an easy way for authors to generate revision marked updates to docs.
- Authors need to deliver and reader can easily find both the "cleartext" of a document and a version diffmarked w.r.t. the previously Issued version
- After a review could need diffmarked wrt previous Issued and previous Review Draft versions.
- As above readers should be able to diffmark wrt last version they read

5.1.3 Document Formats

- > Please store all documents in a universal format such as Adobe PDF.

This may be obvious but to ensure we're on the same page: Docs should be available in ODIN in both their source form and in PDF. Source so others can update the docs in the future and PDF for easy read/print access. Source is also needed because per the ODIN training slides PDF is not among the formats on which we can do full text searches.

An alternative to requiring PDF would be to rely on the ODIN feature which automatically(?) makes an HTML version available for any MS doc format. The downside to relying on that IMO is that for docs exceeding 1 page HTML often is not a very convenient format to send to a printer.

- Documents should be available in a form which on HP-UX can be cut/paste into ASCII text file for the purpose of quoting (as above). Cut/paste from PDF on HP-UX generally does not work for me.
- All formats a document is provided in should be kept in sync. I notice the Odin overview at <http://odin.rsn.hp.com/dscgi/ds.py/View/Collection-41> has FrameMaker and PDF versions available with different revision dates. The contents of these may actually be in sync but seeing different dates raises a flag.

5.1.4 Document Appearance and Usability

- Can we have a document appearance convention or standard that requires there to be a footer on every page that contains not only the page number but the relevant version number, version date and status of the version (draft, Review Draft, etc)? I see subsets of documents and don't know what version I'm looking at, or its date (and I don't care when the document was printed, only when it was updated).
- There needs to be a way for readers to be able to generate revision marked docs from 2 "arbitrary" versions of the doc (e.g., to be able to generate one w.r.t. to the last version they read rather than the one the author posted which was w.r.t. to the last published version).
- A method to easily add line numbers to documents (for review purposes). The line numbers should be consistent across all formats provided for a document.

5.1.5 Folder Organization

- Maybe should have a special area for keeping copies of docs from other groups (e.g., Intel docs) for convenience or to provide an archive if there is concern the supplier may not keep previous revs visible to us.
- Can an aspect of the document folder hierarchy model the source re-structuring organization, as in common, em, PA, and IA)?
- Need an organizational structure/framework in the DMS so that docs of sub-activities naturally feed up into higher levels until you get to one common point for everything in a particular release. At the same time I would like to have the same information organized by functional area. So, for example, I could find a document about the design/implementation of feature “vm_foo” under the complete set docs for the VM subsystem and in the doc tree for release 11.21. Currently the Odin home page looks to be primarily organized by lab. That is probably the least helpful way for product documents to be organized.
- It should be easy to change the linkages that put a document into a particular tree. For example, if feature foo has 20 documents associated with it and feature foo moves from release X to release Y it should be very easy to move the entire set of feature foo documents from the tree for one release to the other.

5.1.6 Groups and Security

- We need to reduce the number of password-protected documents.
- Defining groups needs to be easy, since some people like to share authoring with others and lots of HP people seem to want to prevent global reading of documents.
- Groups need to model real work: employees, contractors, partner company staff, managers, this-project and that-project, kernel developers, testers, etc.
- What is the locking/ownership model for the DMS? Can/should we head off any attempt to establish locks/owners as some groups have done in Jazz?
- Need a method to allow for read access security. Must be able to cover a range of group sizes such as from a few individuals, to a release team, to all of CHO, all HP R&D, and all HP. Plus the NEC/Hitachi issue you already identified. Should be easy to change who has access for a whole set of documents (e.g., when we want to broaden access to all documents for a release when the release has hit a certain milestone).
- OTOH, it would be nice if at creation (or later if necessary) a document could be tagged with an individual “not to exceed” distribution tag. A document’s accessibility would be the more restrictive of the current release distribution level and its own tag. This way the author of a document could decide/indicate who ultimately is the audience for the document but a release manager could control when documents filter out.

5.1.7 Metadata/Attributes

- Use some of the same attribute names and attribute values as are used in CHART (e.g., project name [uses the complicated dot notation like kern.io.scsi], release, version, headline, type, architecture).
- Re: how people are using Odin now and not putting clear enough descriptive metadata: I think it would be really helpful to folks who suddenly see a new document in a collection if they could readily understand:
 - what it is
 - where it came from
 - why it got put there

The first choice is to do a descriptive Title. Next, the Summary would be a good place to put that information. If there's more background than will easily fit in the Summary, then use the Description and point to it from the Summary.

- "Saving It For the Future", Federal Computer Week (04/09/01) Vol. 15, No. 9, P. 50; Peniston, Bradley; Langlois, Greg.

Federal regulations requiring departments and agencies to archive digital materials--emails, Web sites, records, etc.--are so demanding that government information workers are calling for new legislation to help store these documents. The Federal Library and Information Center Committee's 2001 Forum will focus on this topic, especially the National Digital Information Infrastructure and Preservation Program proposed by the Library of Congress. This program asks Congress for \$100 million to create a policy infrastructure for storing government information digitally. Officials of the National Archives and Records Administration spoke to librarians, archivists, and IT personnel about the complexities of the task they face. They said as the number of digital government documents reaches into the billions, even narrow keyword searches are relatively meaningless. Instead, IT experts need to come up with a standard protocol for attaching metatags to documents. Sen. Ted Stevens (R-Alaska), a sponsor of the Library of Congress legislative effort, said the effort to build an effective digital-archive infrastructure must be careful and deliberate despite mounting pressure to store the information.
(<http://fcw.com/fcw/articles/2001/0409/pol-save-04-09-01.asp>)

5.1.8 Notification

- There needs to be a way for readers to be informed when changes are made to documents of interest to them. Docs of interest could be those explicitly named or those that match some sort of criteria
- The notification scheme should be extensible to info not under doc control or should use some more general communication/info distribution mechanism.
- Want the equivalent of ClearCase notification triggers so I can be notified if a particular document is changed. Also would like notification if a document is added to a particular area (release or functional subsystem).

5.1.9 Templates

- need more templates in Microsoft Word, since many older ones are in Frame only
- Should be easy to find templates for all document types and in all source format types.
- Should have templates customized for various groups. For example, perhaps "Kernel Design" and "Commands Design" templates rather than a larger one-size-fits all template. Even better, perhaps a tool that asks a few questions and then generates a customize template.

5.1.10 User Help and Documentation

- cut-and-paste from Acrobat—how to do this?

5.1.11 Verification and Auditing

- This one's a stretch, but there should be some kind of audit/cross-check of the doc mgmt system and other development databases so that we can detect when a document hasn't been entered into doc mgmt (e.g., there should be a way to tell from milestone tracking systems, which docs are going to be prepared and when).

6. Resolved Issues and Work

We may want to move work items and issue that have been done to this section, so we have a record of it all. Perhaps not, too...