

Table of Contents

Table of Contents	1
Introduction.....	2
Section 1 - New Group Formation.....	2
Determine and Document Focus of the Proposed Group	2
Submit a Draft Charter and Propose a Group	3
Approval of a Proposed Group	4
Section 2 - Agendas, Minutes and Participants for all meetings	5
Posting Agendas and Minutes.....	5
Section 3 - Draft Documents and Charter	7
Finding Current Drafts & Charter.....	7
Loading Current Drafts and Charter Documents	9
Submitting Drafts for GGF Conferences	11
Section 4 - Submitting a Grid Working Draft to the GGF Editor	13
Grid Working Draft Template	14
Naming Convention	14
Intellectual Property Statement and Copyright.....	14
The Editor Pipeline	14
Section 5 - Revisions to Documents	16
Creating Trackers for Document Revisions.....	16
Customizing a Tracker.....	18
Submitting Revisions.....	20
Browsing Tracker Items (Revision Requests)	21
Updating Current Versions of Drafts.....	21
Section 6 - Milestones and Tasks	23
Section 7- Adding Members To A Project.....	27
Section 8 – How to Update the Project “Front Page”	28

Introduction

This document is a “cookbook” for GridForge Administrators and chairs listing “recipes” for a core set of functions that each chairperson must be able to perform within GridForge. The contents of this document are not meant to be exhaustive. The list of tasks is purposefully minimized and has been carefully chosen to enable simplicity and consistency across all GGF groups.

The functions that each project must consistently support include:

- Providing group name, acronym, and brief purpose of the group (via charter abstract)
- Providing chair and secretary names and contact information
- Providing a means of managing group membership
- Providing link to the group’s mail list including archives
- Providing links to the full charter document, current drafts in progress, current milestones, and meeting minutes
- Providing document revision trackers for documents in progress.

Additionally, functions for gaining approval of a new group and submitting a grid working draft document to the GGF Editor will be discussed in this document.

Beyond this core set of functions, chairs and Administrators are free to use GridForge tools in a way that best supports the activities of the group. However, this freedom must not infringe upon or violate the consistency that these functions provide both to Administrators and users. As groups find better ways of performing certain tasks, they are encouraged to submit their “recipe” for review and addition in this document. As groups gain greater comfort with GridForge, this list of core functions will be expanded to include other GridForge best practices.

Section 1 - New Group Formation

While the majority of forming a new group does not involve GridForge tools, there are critical junctures where GridForge tools and processes are used to communicate proposed group information and provide a two-way channel between the proposing parties and the GFSG. The steps for proposing a group is are defined in the next three sub-sections.

Determine and Document Focus of the Proposed Group

Individuals interested in forming a new group identify the boundaries of the group, potential leadership, and timelines. These are normally documented in a draft charter, which is the primary mechanism used to communicate between the proposing parties and the approving committee (GFSG). A template for a charter is available in the Chair project at: http://forge.ggf.org/projects/newchairs/document/Charter_Template.

Steps to obtaining a template for a new group charter:

1. Logon to GridForge.
2. Browse to the Chair project and click “Document Manager” on the left Navigation bar.
3. Click the document entitled “Charter Template”.
4. Download this document to your machine and revise it to describe the focus of your proposed group.

Submit a Draft Charter and Propose a Group

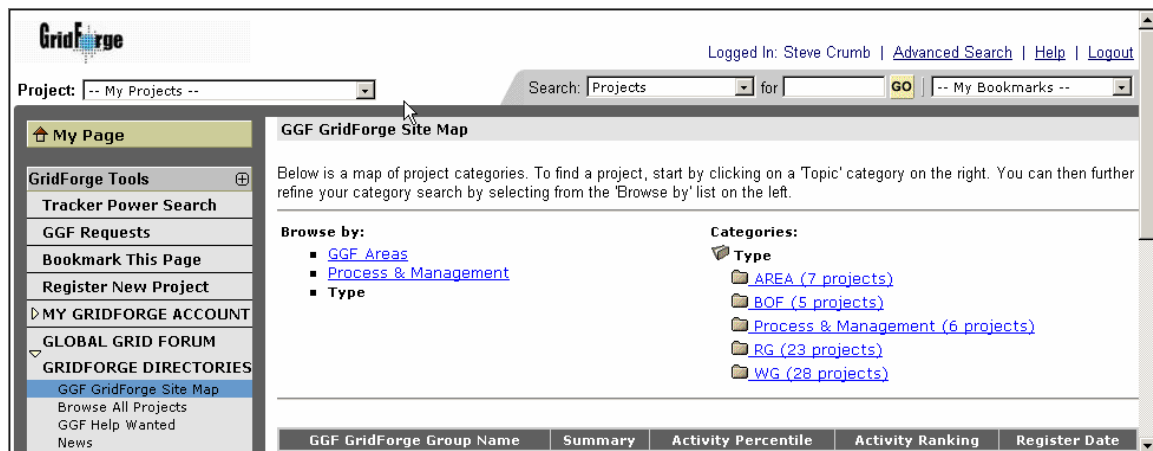
At times, a critical mass of interest has not yet been formed and the proposing parties wish to invite additional participation to obtain a broader perspective on the topic of the proposed group. This can be done through a Birds-of-a-Feather (BOF) session at a GGF meeting. This can precede the drafting of a charter, however it is helpful for parties proposing the BOF to have some written description of the focus of the proposed group from which BOF discussions can be launched. To propose a BOF, one typically initiates interaction with an Area Director or the GGF Chair. This can be done via email, or by visiting the area project in which the proposing parties believe their group focus would reside. In each area project is a tracker titled “Propose New Group”. Submitting a tracker item and providing a description of the focus of the group while attaching a draft charter (if one is available) is the best way to initiate AD involvement in the new group formation.

Steps for submitting a request for a proposed new group to an Area Director:

1. Logon to GridForge.
2. Select the “GGF GridForge Directories” link on the left navigation bar and then click on “GGF GridForge Site Map” link.



3. Select the “Type” link under the “Browse By” heading.



4. Select the “Process & Management” link under the “Type” heading. This will result in a list of all Process and Management projects. Browse to the GFSG-Info project.
5. Once at the project, click on the triangle next to the “TRACKER” link on the left navigation bar. This will unveil a list of trackers. Select the “Submit” link under the tracker entitled “New Group Request”.
6. In the subject field, type the proposed name of the group and then give a paragraph description of the group focus in the Description field.
7. Select the appropriate status of your request from the “Category” field (e.g., Request BOF, Request AD input, etc.) and then select either Research Group or Working Group in the “Group Type” field. Leave the “Group” field as the default.
8. If you have a draft Charter, attach the file in .doc, .txt, or .pdf format in the “Attach File” field.
9. Press the “Save” button.

The Area Directors will automatically receive an indication that a new group has been proposed. As the AD’s make updates to the tracker, you will receive notification of the changes and may visit the tracker item, read their comments, and reply by adding additional comments and pressing “Save”. AD’s may also interact with you using email and other means to gain a greater appreciation for the focus of the proposed group.

Approval of a Proposed Group

After interaction and approval by the AD’s, they will propose the group to the GFSG by a similar process in a private, GFSG project. The AD’s may continue to use the tracker item as a mechanism for recording status and requesting information from the proposing parties. Eventually, however, the group will either be approved or rejected. This answer will flow from the GFSG through the AD with which you were interacting.

Once a group has been approved, the AD will request a mailing list and GridForge project for the new group. Finally, a member of the Secretariat will contact you when the mail list and project have been created and orient you to the usage of GridForge to manage the group activities.

Section 2 - Agendas, Minutes and Participants for all meetings

The Intellectual Property (IP) policy of GGF implies that all interactions, whether face-to-face, teleconference, or electronic in nature, where contributions are made should be recorded to protect the rights of the contributors as well as implementers of resulting standards. As a result, one of the most critical responsibilities of a group chair is to ensure that minutes of all meetings, regardless of venue, are recorded and posted for the GGF community. Minutes should include a list of attendees as well as the subjects discussed. GridForge provides a simple way of recording minutes using the Forum tool.

Posting Agendas and Minutes

In a lifecycle of a typical meeting, an agenda is posted, is bashed (i.e., revised), the meeting is held, minutes are posted, and revisions to minutes noted. GridForge forums provide a single discussion thread where all of this information can be connected.

Steps for posting a meeting Agenda and Minutes:

1. Logon to GridForge and go to your GridForge project.
2. List the available Forums by clicking on the triangle next to the “Forums” link on the left navigation bar.
3. Click on the “Meeting Agendas and Minutes” forum.

The screenshot shows the GridForge forum interface. On the left is a navigation bar with sections like Project Tools, Tracker, Document Manager, Task Manager, File Publisher, News, Forums, and Reporting. The 'Forums' section is expanded, and 'Agendas and Minutes' is selected. The main content area shows a list of forum topics under the heading 'Agendas and Minutes'. The topics are:

Topic	Topic Starter	Replies	Last Post
<input type="checkbox"/> Agenda for 30 Oct 2003	Steve Crumb	1	2003-10-30 10:00
<input type="checkbox"/> Proposed Agenda for GGF9 Meeting	Steve Crumb	0	2003-10-30 10:00
<input type="checkbox"/> Agenda for 9/26/03 Meeting	Steve Crumb	1	2003-10-30 10:00
<input type="checkbox"/> Welcome to Agendas and Minutes	<None>	0	2003-10-30 10:00

Below the list is a 'Start a New Thread' form with fields for Subject and Message. The Subject field is labeled '*Subject:' and the Message field is labeled '*Message:'. There is also a 'Monitor' button at the bottom right of the form.

4. For a new meeting, create a new discussion thread (form at bottom of page). Type in a brief description of the meeting in the subject line (e.g., TEST-WG Agenda 23 October 2003). Type in the Agenda in the Message field (or paste in) and press “Post Message”.

Agendas and Minutes | Ultimate | Show 100 | Change View

Topic	Topic Starter	Replies	Last
<input type="checkbox"/> Agenda for 30 Oct 2003	Steve Crumb	1	200
<input type="checkbox"/> Proposed Agenda for GGF9 Meeting	Steve Crumb	0	200
<input type="checkbox"/> Agenda for 9/26/03 Meeting	Steve Crumb	1	200
<input type="checkbox"/> Welcome to Agendas and Minutes	<None>	0	200

☐ Select All

Select threads you wish to monitor and click on Monitor Selected. [Monitor](#)

Start a New Thread

*Subject:

*Message:

HTML tags will display in your post as text

- Those with revisions to the agenda may follow steps 1-3, select the meeting agenda thread (i.e., title of the Agenda to be revised under “Topic” heading) and post a reply to the Agenda message, by selecting the “Reply” link directly to the right of the Agenda title.

[My Page](#)

Project Web Server

Project Tools

Project Summary

Tracker

- Support Requests**
Submit
- Test Spec Revisions**
Submit

Document Manager
Submit

Task Manager

File Publisher

News
Submit

Forums

- Agendas and Minutes**
Save Place
- Help**
Save Place
- Open Discussion**
Save Place

Reporting

Monitoring

Agenda for 18 December 2003

test-wg : Forums : Agendas and Minutes : Agenda for 18 December 2003

By: [Stacey Bruno](#)

Subject: [Agenda for 18 December 2003](#) [Reply](#)

Date: 2003-12-22

Proposed Agenda:

- 1) Discussion of the lastest revision to the Test Specifications.
- 2) Discussion and the Next Steps prior to GGF10.
- 3) Discussion of topics and dates for next meeting.

Post a follow-up to this message

*Subject:

*Message:

- After the meeting has been concluded and minutes are ready to be posted, then another reply (as in step 5) can be posted containing the minutes.
- Like revisions to the agenda, revisions to the minutes may also be posted as replies as in step 5.

My Page Project Web Server Project Tools Project Summary Tracker Support Requests Submit Test Spec Revisions Submit Document Manager Submit Task Manager File Publisher News Submit Forums Agendas and Minutes Save Place Help Save Place Open Discussion Save Place Reporting Monitoring	Agenda for 18 December 2003 test-wq : Forums : Agendas and Minutes : Agenda for 18 December 2003 <hr/> <p>By: Stacey Bruno</p> <p>Subject: Agenda for 18 December 2003 Reply</p> <p>Date: 2003-12-22</p> <p>Proposed Agenda:</p> <ol style="list-style-type: none"> 1) Discussion of the latest revision to the Test Specifications. 2) Discussion and the Next Steps prior to GGF10. 3) Discussion of topics and dates for next meeting. <hr/> <p>By: Stacey Bruno</p> <p>Subject: Minutes for 18 December 2003 Meeting Reply</p> <p>Date: 2003-12-22</p> <p>Attendees: J Jack Chair J Jill Chair Joe Thorn Billy Bob</p> <p>Agenda & Discussion:</p> <ol style="list-style-type: none"> 1) Discussion of latest revisions of the Test Specification.
--	---

In some cases, text-only meeting minutes may not have sufficient formatting to accurately convey some portion of the minutes (e.g., formatted tables containing action items). The same can be said of sign-in sheets from GGF meetings. In this case, GGF suggests that the formatted minutes (in pdf format) and scanned sign-in sheets are stored in a Document Manager category such as Meeting Materials and URL(s) to those artifacts are included in the forum-based, text-only minutes.

Finally, when a project is created, two aspects of the standard template will be a Forum named "Meeting Agendas and Minutes" and a standard link from the front page entitled "Meeting Agendas and Minutes" which points directly to the contents of the aforementioned forum. This gives a project visitor a quick method of accessing meeting agendas and minutes.

Section 3 - Draft Documents and Charter

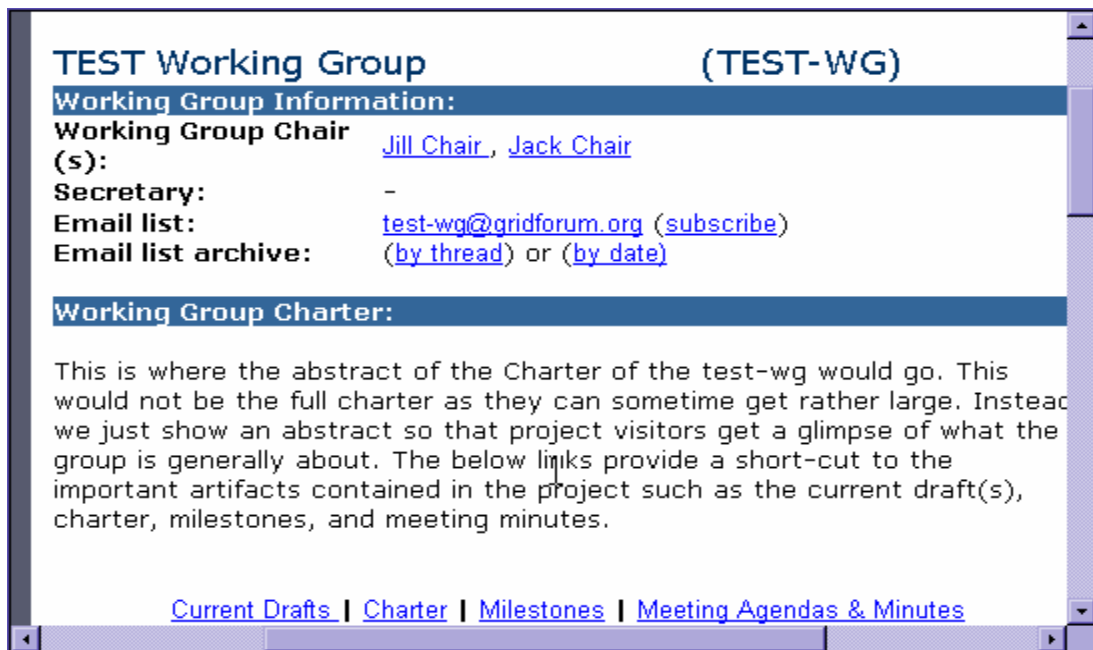
Finding Current Drafts & Charter

Two of the most important artifacts in a given project will be the current version of the group's draft documents and its Charter. As such, they should be easy to find. Each project will have two links on the project's front page called "Current Drafts" and "Charter". These links will point to one of two folders that will be present in every project (Current Drafts and Charter). The Current Drafts folder should always contain

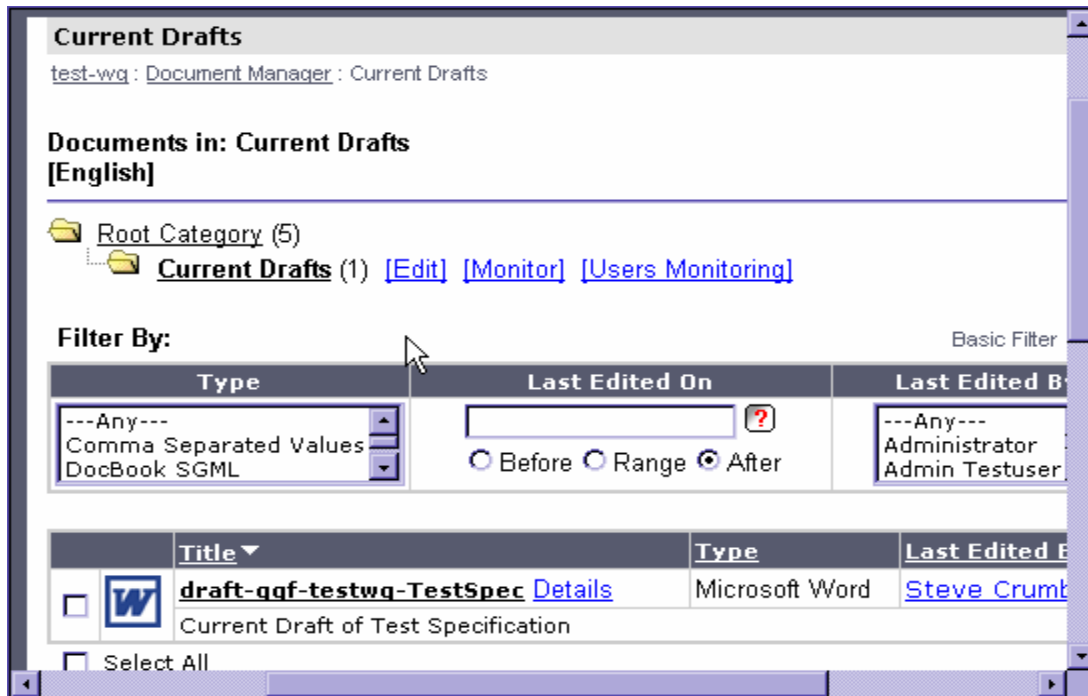
current versions of the group's draft Grid documents. Similarly, the group should store their Charter document in the "Charter" folder.

Steps to Finding a Current Draft

1. Logon to GridForge and browse to the group project.
2. Click on the "Current Drafts" (or "Charter") link on the project front page.



3. Next you may click on the appropriate draft document (or Charter) you are looking to view.



Loading Current Drafts and Charter Documents

In order for project visitors to find the Charter and current draft documents, someone must initially load these documents into their respective folder and maintain them.

Steps for Loading Current Drafts or Charter

1. Logon to GridForge
2. Browse to the project front page.
3. To submit a document to a project, you select the “Submit” link under Document Manager in the left navigation bar.

The screenshot shows a web interface for a project summary. On the left is a sidebar with navigation links: My Page, Project Web Server, Project Tools (with a plus icon), Project Summary (highlighted), Tracker, Document Manager (with a Submit link), Task Manager, File Publisher, News (with a Submit link), Forums, and Agendas and Minutes. The main content area is titled 'Project Summary - test-wg' and contains the following information:

TEST Working Group (TEST-WG)

Working Group Information:

Working Group Chair (s): [Jill Chair](#), [Jack Chair](#)

Secretary: -

Email list: test-wg@gridforum.org ([subscribe](#))

Email list archive: ([by thread](#)) or ([by date](#))

Working Group Charter Abstract:

This is where the abstract of the Charter of the test-wg would go. It is not the full charter as they can sometime get rather large. Instead, show an abstract so that project visitors get a glimpse of what the charter is generally about. The below links provide a short-cut to the important documents contained in the project such as the current draft(s), charter, miles meeting minutes.

4. Once the Submit Document form appears, you first fill in the document title (mandatory) and description.
5. Next, browse and select the document you wish to submit. Note that you may also paste non-binary document text into the Paste Document pane on the form and not use the browse feature. This is determined by which radio button you select.

The screenshot shows a web form titled 'Documentation - New Submission'. The breadcrumb trail is 'test-wg : Document Manager : Documentation - New Submission'. The form has a header 'Add New File' and instructions: 'Enter information to submit a document below. You can also [Upload Multiple Files](#)'. The form fields are as follows:

*** Document Title:** GridForge Training
[Click here](#) for more information on document management

Description: How to use GridForge

Document:

- ☒ **Upload**

File: [Browse...](#)

File Type:
- ☐ **Paste**

Text:

File Type: [Instructions for use](#)

Paste Document:
 Non-Binary Only

6. Next select the type of document (PDF, DOC, TXT). Take care that there is not a mismatch in the type of document as this will result in an error. Charters should be in PDF format.

7. Select the access type, category (either Charter or Current Drafts) into which the document will be placed, and the language of the document. Do not select the Lock or Review check boxes, but take care to read the Acceptable Document Usage information and check its check box (mandatory).

The screenshot shows a web form for submitting a document. At the top, there is a 'File Type' dropdown menu set to 'Plain Text' and a link for 'Instructions for use'. Below this is a large text area labeled 'Paste Document: Non-Binary Only' with a cursor inside. Underneath the text area are three dropdown menus: 'Access Type' set to 'Public Access', 'Category' set to 'Current Drafts', and 'Language' set to 'English'. There are two checkboxes: 'Lock This Document' (unchecked) and 'Lock Comments:' (unchecked). Below these is a checkbox for 'This GGF document needs to be reviewed' (unchecked) and a checked checkbox for 'I have read and agree to all of the terms and conditions listed [Usage](#) guidelines.' At the bottom of the form is an 'Add File' button.

8. After the form has been fully filled in, press the “Add File” button. Note that if you successfully submitted the document, a URL for the document will be presented at the top of the form. If this URL is not present, you will likely have an error message (in red) toward the top of the form indicating something did not submit correctly and you must repeat the process.

Submitting Drafts for GGF Conferences

In the past, the GGF secretariat has requested that chairs submit drafts to be discussed at an upcoming GGF meeting. However, if all current drafts are now posted with GridForge and these can be found in the Current Drafts folder of every group project, then there no longer is a need for submitting them to a central repository. However, since the Secretariat does promote the activities of each meeting in advance, it would be helpful for the chairs to send the URL(s) of the drafts to be discussed at the next GGF to the Secretariat. The URL provided will be displayed on the GGF website where individuals can click directly to view the document that will be discussed during their working session. You may submit the URL(s) along with the meeting agenda and other information required while requesting a session at the GGF meeting.

Steps for Submitting Drafts for GGF Conferences

1. Logon to GridForge
2. Go to https://forge.gridforum.org/tracker/index.php?func=add&group_id=100&atid=557

Logged In: Stacey Bruno | [Advanced Search](#) | [Help](#) | [Logout](#)

Search: for | -- My Bookmarks --

Submit

[GGF Chairs](#) : [Trackers](#) : [Schedule GGF Session](#) : [Submit](#)

Submit a request for a Session at a GGF Conference

1. Please **Logon** prior to filling out this form.
2. Supply group name/acronym in the **Subject** field
3. In the **Description** field, please supply the proposed session title (if applicable), session leaders, and a proposed agenda (may be attached as a document).
4. Select type of session (Working/Research Group) from the **Group** drop-down.
5. Select the AREA of your group from the **Category** drop-down.
6. Select the estimated number of participants (to determine room size) from the **Size** drop-down.
7. Supply the URL to view draft document being discussed at the GGF meeting (if applicable) in the **Draft1** and **Draft2** fields.
8. List at most 5 other sessions (groups, Area meetings, workshops) that you prefer not be scheduled at the same time as your session in the **Conflicts** field.
9. OPTIONAL: Supply a URL for meeting information in the **Info** field.
10. Supply any AV requests: # of microphones, projector, screen, phone line, speaker phone in the **AV** field.
11. Supply any other special requests in the **Special** field.
12. Press **Save** when complete.

* Required field

* **Subject:** ?

* **Description:**

3. In the Subject field fill in the group name and acronym
4. In the Description field put in the proposed session title (if applicable) and a proposed agenda (may be attached as a document).

GridForge: Submit - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://forge.gridforum.org/tracker/index.php?func=add&group_id=100&aid=557 Go

GRIDFORGE DIRECTORIES

GGF GRIDFORGE ADMIN

Priority: <None> ?

Category: <None> ? admin

Group: <None> ? admin

Assigned To: <None> ?

* Size: <None> ? admin

Draft1:

Draft2:

Conflicts:

Info (URL):

A/V Needs:

Special:

Attach File: Browse... ?

File Description:

Associations

Add New Association

Done Internet

5. From the Group drop-down select the type of session (Working/Research/BoF Group)
6. Select the AREA of your group from the category drop-down.
7. Select the estimated number of participants (to determine room size) from the Size drop-down.
8. In the Draft1 and Draft2 supply the URL to view the draft document that will be discussed at the GGF meeting.
9. In the Conflicts field list at most 5 other groups that you would like not to be scheduled at the same time as your session.
10. OPTIONAL: Supply a URL for meeting information in the Info field.
11. Put any other special requests in the Special field.
12. Press Save when complete.

Section 4 - Submitting a Grid Working Draft to the GGF Editor

When GGF documents have gained consensus within a working group or research group, then the draft document may be submitted to the GGF Editor for review and processing. Prior to submitting the document, the draft must have certain attributes of name and format to make it consistent with other Grid working drafts.

Grid Working Draft Template

The document format of all grid working drafts must be consistent. Thus, it is best to obtain a copy of the GWD template and ensure that the content of the document conforms to its format. The GWD template may be downloaded from:

<http://forge.ggf.org/projects/ggf-editor/GFD-Template>.

Naming Convention

All Grid working drafts must follow a consistent naming convention. There are two naming formats depending on whether draft is submitted by a group or by an individual.

For drafts accepted as working groups documents, acronym is that of the working group:

- draft-ggf-[acronym]-[short title]-[version].doc

For individual submissions:

- draft-ggf-[author]-[short title]-[version].doc

Intellectual Property Statement and Copyright

Although it is hoped that the IPR and Copyright statements would have already been included in earlier drafts, these statements **MUST** be included in drafts submitted to the GGF Editor.

The Editor Pipeline

The GGF Editor uses GridForge to manage the pipeline of Grid Working Drafts (GWDs) vying for publication. Thus, it is critical to use the proper submission process to reduce the potential for delays or lost submissions via email.

Steps for Submitting a Draft to the GGF Editor:

1. Logon to GridForge (this is important because you will be emailed with all updates made by the Editor).
2. Go to the following URL:
https://forge.gridforum.org/tracker/index.php?func=add&group_id=90&atid=414
3. This will display the following tracker submit form.

Logged In: Stacey Bruno | [Advanced Search](#) | [Help](#) | [Logg](#)

Search: Submit GGF Draft for | -- My Bookmarks --

Submit
EDITOR : [Trackers](#) : [Submit GGF Draft](#) : [Submit](#)

Use this form to submit a draft to the GGF Editor as a candidate for publication in the GGF document series.

Do not use this form to submit documents for discussion at GGF meetings.

Please review the GGF Document process (GFD-C.1) to ensure that your document contains the proper information (author, date, etc.), *including the GGF Copyright and Intellectual Property statements.*

Acceptable file formats include ASCII text, RTF, and Microsoft Word.

If your document requires images and you are not able to include them in RFT or Microsoft Word, please supply your images as individual JPEG files, with filename clearly indicating figure number and with placeholders in the text.

If your document is the result of a GGF working group or research group activity it must be submitted by one of the working group chairs. Individual submissions, not intended to represent the work of a GGF working group or research group, are also accepted. The review process on individual submissions may take somewhat longer than submissions from working groups or research groups for document types other than Informational.

Please use the following conventions with this tracker:

Subject = title of draft
Description = name of working group, other comments to editor
Priority (leave blank)
Category = select proposed document type {community practice, recommendations track, informational, experimental}
Group = GGF area
Assigned to (leave blank)
File Description = title of draft (yes, this is the second time you entered it!)

Don't forget to attach the file!

* Required field

* Subject:

* Description:

Priority:

<None>

* Category:

<None>

admin

* Group:

<None>

admin

Assigned To:

<None>

Attach File:

File Description:

Save

Cancel

Associations

Add New Association

Save

Cancel

©Global Grid Forum 2003
[Areas, WGs, and Research](#) | [Support](#) | [GGF Home](#) | [GridForge Home](#)
Grid Forum™, Grid Forum™, and the GGF Logo are trademarks of GGF.

 **VA SOFTWARE**

4. Supply the Document Title (mandatory) and Description. Please use the GWD naming convention (i.e., “ggf-draft-groupacronym-title-version” for the title).
5. Leave the Priority box blank (note: this field may not show up on your form)
6. Under Category select proposed document type (community practice, recommendations track, informational, experimental).
7. Select the appropriate GGF Area from the Group drop-down.
8. Leave the “Assigned to” field blank (note: this field may not show up on your form).
9. File description should be the Title of the draft (yes, this is the second time you entered it!). Acceptable file formats include ASCII text, RTF, and Microsoft Word.
10. Attach the file using the Browse button and click the Save button.

The document is now submitted to the GGF Editor. Any updates to the tracker, such as comments added, will be emailed to you directly as the submitter.

Section 5 - Revisions to Documents

A typical activity of a GGF group is to create, revise, and submit documents to the GGF Editor for publishing. GridForge provides useful mechanisms to aid in the document finalization process within a group. Particularly, GridForge provides a document manager with capabilities of versioning documents. Additionally, GridForge provides trackers, which can be used to report, assign, track, and archive revision requests on a particular document.

Creating Trackers for Document Revisions

When a group is working on a document, the project Administrator should create a tracker for requesting and tracking revisions to that document. There should be one tracker for each document being revised.

Steps for creating a new Tracker for reporting revisions on a document:

1. Logon to GridForge as a project Administrator.
2. Browse to the project in which the draft document resides.
3. Click on the triangle next to the ADMINISTRATION link on the left navigation bar and select “Tracker Administration”.
4. Below the list of existing trackers is a form that can be used to create a new tracker. Type in the name of the tracker (e.g., Test Spec Revisions). Then type in a brief description of the purpose of the tracker.

The screenshot shows the GridForge Administration interface. On the left is a sidebar menu with categories: Forums, Reporting, Monitoring, Project Management, Administration, GridForge Tools, Tracker Power Search, Support Request, Bookmark This Page, Register New Project, Account, GridForge Directories, and SourceForge Admin. The 'Administration' section is expanded, showing sub-items like Project Admin, Access Control, View Assignments, Create Role, Copy Role, Modify Role Matrix, Project Information, Audit Log, Project Assistance, List/Edit, Tracker Admin (highlighted), Doc Manager Admin, Task Manager Admin, File Publisher Admin, Mail Admin, News Admin, and Forum Admin. The main content area is a form for creating a new tracker. It includes fields for Name, Description, Send email on new submission to address (with a checked box for 'Send email on all changes'), Days till considered overdue (30), Days to automatically set artifacts from Pending to Closed (14), Task Manager association (checked 'Enable'), Document Manager association (checked 'Enable'), and File Publisher association (checked 'Enable'). There are two large text areas for 'Free form text for the "Submit" page' and 'Free form text for the "Browse" page', both with warnings about HTML errors. A 'SUBMIT' button is at the bottom right.

5. Optionally, you may type in the email address of the individual you wish to act as a “moderator” of the tracker (i.e., the one who should first be aware of it and make appropriate updates to status and assignment). Deselect the “Send mail on all changes” check box.
6. Leave the next several fields as the default.
7. In the “Free form text for Submit page” pane, copy and paste the following text:

```
<strong>Prior to submitting this form, please make sure you are logged in to
GridForge. </strong> <br> To submit a request for revision, please fill out the
following form and press “SUBMIT”. Choose the appropriate value from the
Category and Group fields that best describe your request for revision.”
(Note: If you wish to give more explicit instructions about the custom values
of the Category and Group field, feel free to do so.)
```
8. In the “Free form text for Browse Page” pane, copy and paste the following text:

```
“The following items are requests for revisions submitted by the reviewers.”
(Note: If you wish to be more explicit in your description of the items that are
listed, feel free to do so.)
```
9. When you have filled out the form, press the “SUBMIT” button to create the new tracker.

Customizing a Tracker

Once a tracker is created, an Administrator will want to customize the fields and field values of the tracker to gather the information pertinent to the reason for the tracker (i.e., in this case, recording revision requests).

Steps for Customizing the Fields and Field Values of a Tracker

1. Logon to GridForge as a project Administrator.
2. Browse to the project in which the tracker resides.
3. Click on the triangle next to the ADMINISTRATION link on the left navigation bar and select “Tracker Administration”.
4. Select the tracker to be customized from the list of existing trackers displayed.

Tracker Admin

[test-wq](#) : [Project Admin Summary](#) : Tracker Admin

Select an existing tracker to maintain fields, canned responses and preferences or enter information below to create a new tracker.

Name	Description
Support Requests	Tech Support Tracking System
Test Spec Revisions	Submit revisions to Test Specification

5. Select “Fields Admin”.

Test Spec Revisions Admin

[test-wq](#) : [Project Admin Summary](#) : [Tracker Admin](#) : Test Spec Revisions Admin

[Fields Admin](#)

Choose which fields are available, edit their values, set other field properties.

[Add/Update Canned Responses](#)

Create/Change generic response messages for the tracker.

[Update preferences](#)

Set up preferences like expiration times, email addresses, etc.

[Delete Tracker](#)

Delete empty unused tracker.

6. Scroll down to the row containing “Group” and select the “Configure” link on that row to the far right.

Project Summary				
Tracker				
Document Manager				
Submit				
Task Manager				
File Publisher				
News				
Submit				
Forums				
Reporting				
Monitoring				
Project Management				
Administration				
Project Admin				
Access Control				
View Assignments				
Create Role				
Copy Role				
Modify Role Matrix				
Project Information				
Audit Log				
Project Assistance				
List/Edit				
Tracker Admin				
Doc Manager Admin				
Task Manager Admin				
File Publisher Admin				
Mail Admin				
News Admin				
Forum Admin				
GridForge Tools				
Tracker Power Search				

Field	Enabled	Required	Data Type	Value
Artifact ID	<input checked="" type="checkbox"/>	n/a	Integer	
Project	<input checked="" type="checkbox"/>	n/a	String	
Tracker	<input checked="" type="checkbox"/>	n/a	Integer	
Submit Date	<input checked="" type="checkbox"/>	n/a	Timestamp	
Last Modified	<input checked="" type="checkbox"/>	n/a	Timestamp	
Last Modified By	<input checked="" type="checkbox"/>	n/a	User reference	
Close Date	<input checked="" type="checkbox"/>	n/a	Timestamp	
Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	String	
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Text	
Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Status Class	<input checked="" type="checkbox"/>	n/a	Value List	
Priority	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Range 1-5	
Submitted By	<input checked="" type="checkbox"/>	n/a	User reference	
Assigned To	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tracker technician	
Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Group	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Resolution	<input type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Severity	<input type="checkbox"/>	<input type="checkbox"/>	Range 1-5	
Platform	<input type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
OS	<input type="checkbox"/>	<input type="checkbox"/>	Value List	Configure
Browser	<input type="checkbox"/>	<input type="checkbox"/>	Value List	Configure

7. Type in the values of the “Group” list you wish to have. Examples might be “Typo”, “Missing Figure”, “Reference Needed”, “Unclear”, or any number of other groups of revisions. Type these (four or less at a time) into the “New Value” table and press “Update”.

[My Page](#)

Project Web Server

Project Tools

Project Summary

Tracker

Document Manager

Submit

Task Manager

File Publisher

News

Submit

Forums

Reporting

Monitoring

Project Management

Administration

Project Admin

Access Control

View Assignments

Create Role

Copy Role

Modify Role Matrix

Project Information

Audit Log

Project Assistance

List/Edit

Tracker Admin

Doc Manager Admin

Task Manager Admin

Configure Field: Group

test-wg : Project Admin Summary : Tracker Admin : Support Requests Admin : Field Administration : Configure Field: Group

Each tracker in the system inherits values defined in the PROTO TRACKER of Master Group. This allows administrators to enforce consistent workflow patterns across all projects in the enterprise. These patterns can be extended to satisfy specific needs using the local (per-tracker) values below. Note that inheritance is dynamic: adding or removing value in PROTO TRACKER propagates immediately across all projects. Current inherited values are presented below:

Value
<None>

Edit local values for the 'Group' field below. Delete or rename values with caution. Deleting a value causes all items with that value to be changed to 'None'. Renaming a value causes all items with the current value to be changed to the new value.

Delete	Value(max 64 chars)
	No local values defined for this field.

Create new values for the 'Group' field below. To add more values, click Update to record your current additions and be presented with additional blank fields.

New value(max 64 chars)
Typo
Reference Needed
Missing Figure
General Edit
Other

Update Reset Changes

8. Return to the “Fields Administration” page and select the “Configure” link to the far right of the row containing “Category”.

- Determine the values for the “Category” list you wish to have. These are typically sections of the document like chapters or sub-sections. If you have particular contributors that are responsible for particular sections, you may wish to give these sections meta-names (e.g., WSDL section). Type these values into the “New Value” table (up to 4 at a time). Prior to submitting, if you wish that a submitted item be sent directly to the contributor responsible for the selected section, then select the contributor’s name from the “auto-assign to” drop-down. When the table is filled out, press the “Update” button.

GridForge

Logged In: Stacey Bruno | [Advanced Search](#) | [Help](#)

Project: test-wg Search: Test Spec Revisions for GO -- My Bookmarks

Configure Field: Category

test-wg : Project Admin Summary : Tracker Admin : Test Spec Revisions Admin : Field Administration : Configure Field: Category

Each tracker in the system inherits values defined in the PROTO TRACKER of Master Group. This allows administrators consistent workflow patterns across all projects in the enterprise. These patterns can be extended to satisfy specific n the local (per-tracker) values below. Note that inheritance is dynamic: adding or removing value in PROTO TRACKER immediately across all projects. Current inherited values are presented below:

Value	Auto-assign to
<None>	

Edit local values for the 'Category' field below. Delete or rename values with caution. Deleting a value causes all item value to be changed to 'None'. Renaming a value causes all items with the current value to be changed to the new val

Delete	Value(max 64 chars)	Auto-assign to
<input type="checkbox"/>	Appendix	Steve Crumb
<input type="checkbox"/>	Introduction	Steve Crumb
<input type="checkbox"/>	Section 4-6	Stacey Bruno
<input type="checkbox"/>	Sections 1-3	Steve Crumb

Submitting Revisions

Once the tracker is created and customized, document reviewers may use it to request revisions to documents.

Steps for Submitting Document revisions using a tracker:

- Logon to GridForge and go to the project in which the document resides.
- Select the triangle next to the “TRACKER” link in the left navigation bar.
- Select the “Submit” link immediately below the Tracker referencing the document for which you wish to submit revisions.
- Fill out the tracker item form, selecting the appropriate values from the “Category” and “Group” drop-downs.

Submit
test-wg : Trackers : Test Spec Revisions : Submit

Prior to submitting this form, please make sure you are logged in to GridForge.
To submit a request for revision, please fill out the following form and press "SUBMIT". Choose the appropriate value from the Category and Group fields that best describe your request for revision.

* Required field

* **Summary:** Introduction Revision

* **Description:** In the introduction, we need to be more specific about the background of the test area. A sentence or two about it's background and other activities leading up to our work in the working group would be a helpful addition.

Priority: <None>

Category: Introduction admin

Group: Rewording Needed admin

Assigned To: <None>

Attach File: Browse...

File Description:

Save Cancel

5. You may choose to attach a marked-up version of the document in the "Attach File" field by browsing and selecting a document accessible on your local machine.
6. After the form is complete, press the "Save" button to create the tracker item.

Browsing Tracker Items (Revision Requests)

After the tracker has been created and items have been submitted, one may review the items by browsing the tracker.

Steps for browsing a list of tracker items

1. Logon to GridForge and browse to the group project.
2. Click in the triangle next to the "TRACKER" link in the left navigation bar.
3. Click on the name of the tracker (e.g., Revisions to Test Spec).
4. If you have appropriate permissions, a list of submitted tracker items is displayed.
5. Click on the title of the tracker item in the Subject column to view the item details.

Updating Current Versions of Drafts

Once requests for revisions begin to come in via the tracker, document authors and editors will want to make updates and create new versions of the draft. A typical draft document will go through many versions prior to being sent to the GGF Editor for comment. The previous sections indicated that it is important to keep the current versions of drafts available in the "Current Drafts" folder. However, group members

often want to view previous versions and may even wish to keep a certain version as “public” while a newer version is being reviewed. GridForge document manager supports both of these needs without having to keeping copies of the document’s previous versions.

Steps for Loading an Updated Draft

1. Logon to GridForge and browse to the project containing the document you wish to update.
2. Click on the “Document Manager” link from the left navigation bar.
3. Browse to the folder containing the document you wish to update and open it.
4. Find the document you wish to update and click on the “Details” link next to the document title.
5. Press the “Edit” button at the bottom of the next form.
6. This displays the Edit Document form.

Edit Document

test-wg : Document Manager : Current Drafts : @@draft-ggf-testwg-TestSpec : Edit Document

Edit Document draft-ggf-testwg-TestSpec [English]

* **Document Title:** draft-ggf-testwg-TestSpec

Description: Current Draft of Test Specification

* **Administrative Title:** draft-ggf-testwg-TestSpec

* **Access Type:** Public Access

* **Status:** Active

* **File Type:** Microsoft Word

Version Comment: Version 3
Change Log

Make Active: ☒ Make this version the default version

Create New Version ☒ Create new version of this document with the modifications.

Lock This Document ☐

Lock Comments:

Upload File: C:\Documents and Settings\scru...

Paste Document:
Non-Binary Only

7. Press the “Browse” button and find the updated version of the document on your local machine. You may wish to supply a Version Comment as well.
8. When complete, press the “Update Document” button and GridForge will replace the old version of the document with the uploaded version you provided.

Section 6 - Milestones and Tasks

As part of the group approval process the GFSG requires that a group set specific milestones for productivity. These milestones may be workshops held, documents completed, or a variety of other deliverables. GridForge provides a task management tool, similar to project management software that can be used to record the milestones and track progress and completion. Milestones are becoming an important metric in determining a group's effectiveness. Area Directors and the steering group in general will begin using GridForge's project management capabilities to track progress toward the milestones of each group. It is vital, then, that groups load their milestones, record progress toward completion, and mark milestones completed.

Each group will be created with a master task group called "GGF Group Milestones" and a sub-group that has the same name as the group (e.g., test-wg). Chairs should record the milestones of the group and mark progress toward completion of the milestone in this sub-group.

Steps for initially loading milestones:

1. Logon to GridForge and browse to your project.
2. Click on the triangle next to "Task Manager" in the left navigation bar.
3. Click on "Add Task"
4. You will be presented with an Add Task Form.

Add a New Task

test-wg : Task Manager : GGF Group Milestones : Add a New Task

Task Group: Test-WG Milestones		
Task Type:	General Task	WBS #: Will be assigned
Percent Complete:	Not Started	Priority: 5 - Lowest
*Task Name: (Maximum 50 characters)		
*Task Details: (Maximum 4000 characters)		
Start Date: November 3 2003		
End Date: November 3 2003		
Assigned To:	Administrator Admin Testuser Crumb Steve Stacey Bruno Steve Crumb	Dependent On Task: None 23-Re-Charter for post-Test Spec Activ 22-Finalize Test Spec at GGF10 21-Submit Final Draft to Editor 20-Incorporate GGF9 comments 19-Submit Test Spec Draft at GGF9
Hours: Decimals will be rounded		
Actual Hours: Decimals will be rounded		
<input type="button" value="Submit"/>		

5. The Task Group should already reflect the name of your group. Fill in the Task Name and Task Details with your milestone name and a brief description.
 6. Set the start and end dates. (Note: If your milestone is related to a particular GGF meeting, use March 7 for Spring meetings, June 7 for summer meetings, and October 7 for fall meetings.)
 7. Select the Assigned To person(s) (if applicable).
 8. If the task is dependent on the completion of another previously defined task, select it from the “Dependent On Task” pane.
 9. Press the Submit button to add the milestone into task manager.
- Repeat this process until all milestones have been added to the task manager.

Steps for updating progress toward milestones:

1. Logon to GridForge and browse to your project.
2. Click on the triangle next to “Task Manager” in the left navigation bar.
3. Click “GGF Group Milestones” and you will be presented with a list of tasks resident in the project.

Submit New Task

Add Task

Browse Tasks:

Task Group Assigned to Status

Any Any Any Browse

	Task Status	Priority	Task ID ▼	Task Name	Start Date	End Date	Percent Complete
<input type="checkbox"/>	Not Started	5	19	Submit Test Spec Draft at GGF9	2003-10-04	2003-10-05	100%
<input type="checkbox"/>	Not Started	2	20	Incorporate GGF9 comments	2003-10-15	2003-11-30	15%
<input type="checkbox"/>	Not Started	4	21	Submit Final Draft to Editor	2004-01-05	2004-01-15	0%
<input type="checkbox"/>	Not Started	5	22	Finalize Test Spec at GGF10	2004-03-04	2004-03-13	0%
<input type="checkbox"/>	Not Started	5	23	Re-Charter for post-Test Spec Activities	2004-06-01	2004-07-30	0%
<input type="checkbox"/> Select All							Total:5

4. Select the task name of the task you wish to update. This will result in a modify task details form.

Modify Task

[test-wg](#) : [Task Manager](#) : [GGF Group Milestones](#) : [Modify Task](#)

Users Monitoring

Submit Changes

Cancel

***Task Name:**
 (Maximum 50 characters)

Incorporate GGF9 comments

WBS #: 1.2

Type: General Task

Priority: 2

Percentage Complete: 15%

Start Date: October 15 2003

Planned Hours: 0
 Decimals will be rounded

End Date: November 30 2003

Actual Hours: 0
 Decimals will be rounded

Assigned To:

Administrator
 Admin Testuser
Crumb Steve
 Stacey Bruno
 Steve Crumb

Assigned by: Steve Crumb

***Task Details:**
 (Maximum 4000 characters)

Make Revisions to Test Spec from GGF9 comments

5. You may make what ever updates you wish to the details. Since the milestone end dates are linked to your charter milestones, please do not update milestone end dates without first discussing it with your Area Director.
6. When updates are complete, press the “Submit Changes” button to update the task.

Steps for closing a task:

1. Logon to GridForge and browse to your project.
2. Click on the triangle next to “Task Manager” in the left navigation bar.
3. Click “GGF Group Milestones” and you will be presented with a list of tasks resident in the project.

Submit New Task[Add Task](#)**Browse Tasks:**

Task Group Assigned to Status

Any Any Any [Browse](#)

	Task Status	Priority	Task ID	Task Name	Start Date	End Date	Percent Complete
<input type="checkbox"/>	Not Started	5	19	Submit Test Spec Draft at GGF9	2003-10-04	2003-10-05	100%
<input type="checkbox"/>	Not Started	2	20	Incorporate GGF9 comments	2003-10-15	2003-11-30	15%
<input type="checkbox"/>	Not Started	4	21	Submit Final Draft to Editor	2004-01-05	2004-01-15	0%
<input type="checkbox"/>	Not Started	5	22	Finalize Test Spec at GGF10	2004-03-04	2004-03-13	0%
<input type="checkbox"/>	Not Started	5	23	Re-Charter for post-Test Spec Activities	2004-06-01	2004-07-30	0%

☐ Select All

Total:5

4. Select the task name of the task you wish to update. This will result in a modify task details form.

[Submit Changes](#)
[Cancel](#)

***Task Name:**
(Maximum 50 characters)

WBS #: 1.1

Type: General Task

Priority:

Percentage Complete:

Start Date:

Planned Hours:
Decimals will be rounded

End Date:

Actual Hours:
Decimals will be rounded

Assigned To:
Admin Testuser
Crumb Steve
Stacey Bruno
Steve Crumb

Assigned by: Steve Crumb

***Task Details:**
(Maximum 4000 characters)

Status:

Accomplishment:
(Maximum 2000 characters)

Plan:
(Maximum 2000 characters)

Issues:

5. To close a task, select “Completed” from the Status drop-down. Also, you may wish to select 100% from the Percentage Complete drop-down and fill out the Accomplishment pane with details on the completion of the task.
6. Press the “Submit Changes” button when you are done.

Section 7- Adding Members To A Project

Steps for Customizing the Fields and Field Values of a Tracker

1. Logon to GridForge. During this process, the user will obtain a login name (also known as a “short name”).
2. Next the project Administrator navigates to the Project Administration Summary page by clicking the Administration Project link on the left navigation bar. The Add Member pane offers a text box into which an Administrator can type the login name of the user to be added and press “Add”. If the login name is a valid GridForge user, then the user is added to the membership.

Project Web Server

Project Tools ⊕

Project Summary

▼ **Tracker**

Support Requests
 Submit

Test Spec Revisions
 Submit

Document Manager
 Submit

▶ **Task Manager**

File Publisher

News
 Submit

▶ **Forums**

▶ **Reporting**

▶ **Monitoring**

Project Management

▼ **Administration**

 ▼ Project Admin

 ▼ Access Control
 View Assignments

Project Information

TEST Working Group (TEST-WG)

Working Group Information:

Working Group Chair(s): [Jill Chair](#), [Jack Chair](#)

Secretary: -

Email list: test-wg@gridforum.org ([subscribe](#))

Email list archive: ([by thread](#)) or ([by date](#))

Working Group Charter Abstract:

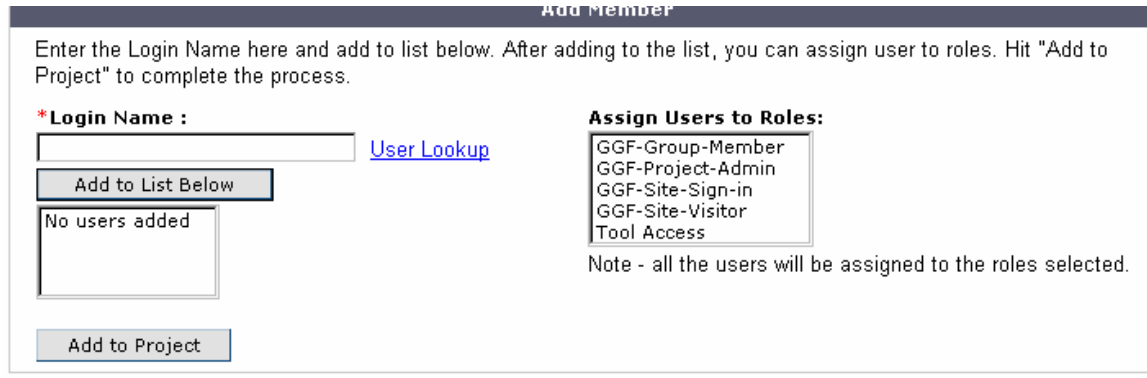
This is where the abstract of the Charter of the test-wg would go. This would not be the full charter as they can sometime get rather large. Instead, we just show an abstract so that project visitors get a glimpse of what the group is generally about. The below links provide a short-cut to the important artifacts contained in the project such as the current draft(s), charter, milestones, and meeting minutes.

[Current Drafts](#) | [Charter](#) | [Milestones](#) | [Meeting Agendas & Minutes](#)

[Edit Project Information](#)

3. Assign a role to the new member. Normally, new members are assigned the role of GGF-Project-Member. This is done by pressing the “Edit Member Permissions” link at the bottom of the member listing. On the subsequent page, a

list of the four roles is presented and a link “Edit User Assignments”. Press the link that is next to the role you wish to grant to the new member. A page is displayed showing a listing of the project members. To grant the role to the new member, simply check the check box next to the new member and press Update. The same can be done for other roles such as GGF-Project-Administration or GGF-Site-Sign-in.



Section 8 – How to Update the Project “Front Page”

From time to time, a project Administrator will want to update the front page of a project. While this is a relatively simple process, care should be taken to preserve the layout of the front page, which is purposefully consistent with other GridForge projects. Updating links, adding content, updating the names and contact information of chairs, and other simple changes are permissible.

Steps for updating the project “front page”

1. Logon to GridForge and browse to the project.
2. On the left navigation bar under “Administration”, press the link entitled “Project Info.” You will be presented a page with a Description pane containing the html code for the front page. This can easily be cut out and pasted into an html editor of your choice (for more wholesale changes) or one can make the changes to the code in the pane.

Edit Project Information

test-wg : [Project Admin Summary](#) : Edit Project Information

***Project Name:**

test-wg

***Description (10-255 characters) :**

<html>
<head>

Active Features:

☐ Mailing Lists

☒ Forums

☒ Task Manager

☐ SCM

☒ News

☒ Document Manager

☒ Project Web Server

Update

- Once the changes have been made (either by pasting back the updated code from your editor or by making the change directly in the pane), press the “Update” button at the bottom of the page.
- Return to the front page of the project and verify that the changes made are correct.