Project Observatory™ 3

Release Notes
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Marin Research, Inc.
www.marinres.com

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Installation Notes

The installation process is essentially the same as that specified in the Observatory Guide Administrators manual for Release 2 with the following exceptions:

1. The Repository-Observatory link and Request-Observatory links are prebuilt into the Project Gateway 5.11 release. Hence, you do not need to install them. You should update to the latest Project Gateway service pack.

2. These links offer the option of “direct deposit”. This may be used only when the repository and observatory are co-located on the same server. If this option can be used, it should be. Using this option will remove the need to send mail between the databases to transfer project status.

3. The Observatory Management Assistant replaces the Observatory Setup Assistant.

4. The Administration form contains several new sections.

5. The Customization navigator contains new options for Overhead Projects and Reports. There are also changes in the appearance of the capabilities and location forms.

The Observatory Management Assistant

The OMA removes most of the administrative work required to setup and maintain a Project Observatory that is used in conjunction with one or more Project Gateway databases.

The OMA operates by periodically scanning the structure of the Project Gateway database. It then creates or changes the structure of the Observatory to match it.

By "structure" we mean the names and hierarchy of the Organizations, Programs, and Participants and the membership of participants and projects to the Organizations and Programs.

When the OMA is enabled, any structural changes made in the PG database will be automatically made in the Observatory database.

The OMA will handle changes made in your repository to all of the following:

- Organization names
- Organization hierarchy
- Participant names
- Participant membership (i.e. what organization it belongs to)
- Program names
- Program hierarchy
- Project membership
- Changes in manager names on Organizations, Programs, and Participants.

Note: Changes in repository project names are done as part of the normal project process and do not require the use of the OMA.

To accomplish its function, the OMA relies on a short table of instructions which must be setup by the administrator for each connected repository. This table tells the OMA what repository to look at and provides defaults for the initialization of various Observatory features that do not have a equivalent in the repository database.

The OMA runs as a preamble to the project abstract processing. This means that the Observatory should always be configured to match the current project reports.

As previously stated, the OMA requires instructions. These are provided in the "Origin Document" for the particular Project Gateway repository.

To locate the Origin Documents in your Observatory, open the database, select Management, and then select "Origin worksheet" which is listed near the center of the Management navigator.

The view that appears will list all of the "Origin Documents" that currently exist in your Observatory. In most cases when you are reading these instructions, you will find that this view is empty.

To create an origin document for your Project Gateway repository (we are assuming for the moment that you have only one), Select "Create- A New Origin" from the Notes menu.

This will display a very simple form which asks you for the filename of the project gateway repository. Enter the filename. You should enter this exactly as you will find it displayed by the database properties information tab when the repository is selected. The filename will end in ".nsf".

After entering the filename, Save and Close the form.

Now redisplay the "Origins Worksheet". You will see your new document. Open the document.

At the top, you will see the banner "Program Assignment for Origin:" followed by the title of your repository.

Edit the document.

There are three main parts to the information you must provide.

- Participant Reservations Synchronization
- Cluster Membership
- Observatory Management Assistant (OMA) Settings

Participant Reservations Synchronization
This part allows you to choose whether or not to have the Observatory create a member reservation for the holidays declared by each repository participant.

As you may recall, participant holidays are created by using the "Schedule" action on Repository Participant Profiles. If you enable the this feature in the Origin document, the Observatory will, periodically, read the list of scheduled holidays from the repository and create a single, integrated reservation for that participant that will be attached to the Observatory Member Report for that person. This reservation will then be used to compute the availability of that person in resource searches and other tabulations.

While this feature is useful in itself, it is enhanced by the ability to declare holidays in the Observatory. That can be done using the Schedule function which now appears in both Member Reports and Custom Location Definitions.

Hence, by setting a single holiday entry on a location document, you can create a reservation for all members at that location (or any sub location). These holidays will be added to those explicitly declared in the Participant Profile or the Member Report.

The Synchronization function two modes of operation.

- Reserve Participant Holidays

- Reserve and Update Participant Holidays

If you select the first option, then the Observatory will be updated with the repository holidays.

If you select the second option, then the Participant Profile will also be updated. When this is done, any holidays declared in the Observatory will be added to those declared in the Repository and shown together on the Schedule entry form in the Participant Profile.

In addition, when the second option is chosen, those additional holidays will be used when computing the various workload reports generated by Project Gateway and will be exported to Microsoft Project when the "Export Participant Holidays" function is used.

Holiday Synchronization when using multiple repositories.

If there is more than one Project Gateway Repository, then there will be an origin document for each. In each origin document, you have these same options. If a single participant exists in more than one of these repositories, then all of the holidays from all of the repositories, plus the Member holidays and location holidays will be integrated into a single Holiday reservation. And, all of the holidays will be pushed back to all of the participant profiles. Hence the holidays shown in all repositories will be the same.

To summarize: If a holiday is declared in any of the repositories, it will be collected by the Observatory into a common reservation, and then redistributed to all other repositories.

For this function, Participants are matched to Members and each other by the participant name only. The organization name is not used for this function. Hence, if you are using multiple repositories, you should use the exact same spelling of the participant name for each person. If you make a name change in one repository, you really should make the same change in all of them.

The OMA relieves the administrator of the necessity to create Organization, Member and Program documents, and of the need to use the Organization Assignment and Program Assignment worksheets when the project information is coming from one or more Project Gateway Repositories.

The OMA does not change the administrators tasks when projects are arriving from other sources such as Observatory Reporter or the Microsoft Project Observatory Link.

The OMA assumes ownership of the documents that it creates or controls. As a result, if a Program, for example, is created by the OMA, you cannot change the name of that program. The action normally used to change program names (Identification) will not appear on the Program report.

Instead, the OMA will adjust the Program name when the program name is changed in the associated Project Gateway Repository.

Hence when the OMA is engaged, the structure of the Observatory automatically reflects the structure of the connected Project Gateway Repository. Any changes made in the repository will be mirrored in the observatory. The "reconfiguration" is done each time the XML Message Processing Agent runs. By default, this will be once per day in the evening. You can, however, schedule this to occur as often as every hour, or a person with [OBSADMIN] rights can execute the function at any time.

The table of options in the OMA section of the Origin Document instructs the OMA when processing that particular repository.

There are individual options for controlling the autoconfiguration of Programs, Organizations, and Members.

PROGRAM CONFIGURATION RULES

- Parent Program Selection
- Default Manager Selection
- Default Options Selection

Parent Program

The selection of a "parent program" is an important decision to make if you have several Project Gateway Repositories or have other sources of project information.

The Parent Program is simple the "Master Program" for all of the Programs defined in this repository. This Parent will provide a single place in which all the effort of the repository will be collected and from which reports about all the projects in that repository can be run.

In most situations you will want to have a parent program. There are only two exceptions to consider:

1) If your repository has a parent program that all projects are assigned to, then you won't want another level of program that will have the identical membership. In this case there is an option provided in the program name selection list [Use Repository Parent Program] which both tells the system to do this and also checks to make sure that all of your repository projects are really assigned within that program.

2) If the only source that will feed your observatory is a single repository, and you don't have any use for a master rollup, then you don't have to use a parent program.

Assuming that you want to have a parent program, you must create it before you can select it.

To create a new program, use the "Create - A New Program" command from the Notes menu or the pencilpad icon next to the words "program list" on the Management Navigator. In most cases you will want your parent program to be a first level program (one which has no parent).

After creating the program, you can reopen the origin document and select it.

Default Manager

This should be your name, or the name of another person who will take ownership of a program. This person will receive e-mails telling of program problems. They will also have edit access to the program report document so that they can change settings.

This works in conjunction with the option discussed below for setting the manager name on newly created programs.

Options

The options selected here will be set on every new program report created in the Observatory in conjunction with the repository. Once set, these options can be changed by the program manager and by the system administrators.

Notify on Red Indicators. If selected it will be set on new programs. If set on a program then the program manager will receive an email if one or more of the dashboard indicators (time, effort, cost, issues, progress) transitions to a red condition. These indicators are in turn driven by the comparison of the rolled up project data and the targets set for each program by the program manager.

Do Not Forecast. If selected it will be set on new programs. If set on a program then the program manager will receive an email if one or more of the primary trends (time, effort, cost) indicates that a dashboard target overrun is likely to occur within the next few months. The system evaluates the trend information periodically and creates a "forecast" document when a likely problem is detected. The email is sent when the forecast document is created. By checking this option, you can prevent forecasting from being done on the programs created from this repository.

Default manager for new programs

A new program is created in the observatory whenever a new program is found in the repository for the first time. When the program report is created, a manager must be assigned. This can be either the same person recorded on the Repository Program Profile document, or it can be the "Default Program Manager" specified above.

ORGANIZATION CONFIGURATION OPTIONS

Organizations are very similar to programs. You probably want to specify a top level parent organization unless one already exists in the Repository.

Default manager for new organizations. This name will be inserted as the manager for any new organization for which a manager name is not provided by the repository or if the "Always used default" option is selected below.

Default options for new organizations.

Notify if Red Indicators. If selected, then managers will receive email if dashboard indicators turn red.

Do Not Interview. If not selected, then managers will be sent questionnaires to gather information about the skills and locations of this organization.

Do Not Forecast. If not selected, the system will generate forecast documents when it finds over commitments of this organization in the future and send an email to the manager.

Compute Capacity. If selected, the system will compute the capacity of this organization as the sum of the capacity of all the members of this organization and all of its suborganizations. This capacity (which is a weekly time series) will be adjusted whenever organization membership or the capacity of individual members is changed. If not selected, then the capacity of the organization should be manually entered using the “Capacity action” on the organization form.

Manager name for organizations. This is a rule with two choices: Choice one is “Always use the manager name from the organization profile if available”. Choice two is “Always used Default manager name entered above.” Choice one will replicate the repository manager names, choice two will override them. If you want to keep the Observatory to yourself, then choice two will ensure that you will be the only person who receives e-mails about these organizations. This is sometimes convenient for testing purposes.

PARTICIPANT CONFIGURATION RULES

Repository participants become Observatory Organization Members.

New Member capacity. This is a rule which defines how the capacity of each newly created participant is preset. The result will always be a constant weekly capacity. You can change the value and time profile of this capacity at a later time using the capacity action on the member report document.

a) Use Default from the Organization to which the participant is being assigned.
b) Use Default from the Administration Form.
c) Use Value set below.

Default options for new participants.

Notify if Red Indicators. If set, an email will be sent to the organization manager when any of the 4 dashboard capacity indicators transitions to a red state.

Do Not Interview. If not set, then the system will send a questionnaire to the appropriate interviewer (as selected below) to gather the skills and location of the participant. This checkbox is used to prevent such interviewing.

Do Not Forecast. If not set, then the system will periodically, look forward in time to see if the member is overcommitted at some future time. If such an overcommit is found, the system will generate a forecast document and send an email to the manager of the member.

Hide from Search. If set, the system will never return this member as a candidate in a resource search. Naturally, if you set this option on most of your members, the search function becomes useless.

Options Maintenance. These rules determine whether options are maintained in the default settings or can be permanently changed by the owners of the Member documents. Normally the "Do Not Change Options" setting should be used. This will allow users to customize their options to suit their needs. The other choice, "Reset to default settings" will reset the options in every member document. This can be useful when first setting up the system. For example, you might want to prevent all email from being set by disabling Red Indicators, Forecasting and Interviewing for the first few weeks. So you would set those options, and select "Reset". After a few weeks, you might want to enable the options for everyone and then allow them to be individually adjusted. This would be a two day process. On day 1 you would set the options as desired and set Options Maintenance to "Reset". On day two, you would change options maintenance to "Do Not Change".

Manager name for participants. Should participants be their own managers? Being a manager of a member means that you will get the e-mails sent about that member for overcommits, forecasts, and resource workflow. In many cases, these messages are more useful to the department manager than the participant. So this option allows you to setup the member report manager as either the name found in the participant profile, or the name found in the Organization report of the parent organization. That name, in turn, is normally populated from the Organization Profile of the repository.

Who should be interviewed for skills information?. This option allows you to direct the skills interviews to a different person than the other e-mails sent about this member. In most cases you will want to send the skills interviews to the participant themselves, but the other e-mails to the department managers. The third option here is to send all of the interview forms to a specific person. Note that, if "Do not interview" is checked, no one will be interviewed.

Repository Clusters

Any number of Project Gateway repositories can feed into a single Observatory database. Each of these origins will have an origin form. In the simplest case, each repository is completely independent of all others. Hence, you would set up a parent organization and program for each repository.

Sometimes, however, you have two or more repositories that should be considered to be parts of a larger repository. This situation is what we call a Repository Cluster.

The reason for creating a cluster is that you have common organizations, programs, and participants in two or more repositories. By setting up a cluster, one Observatory organization, program and member is created which will merge the work found in the separate repositories.

Example. Two repositories have a program called “Development” . There are 5 development projects in Rep A and 7 in Rep B. By putting both repositories into a cluster, you will have a single Observatory program called “Development” which will hold all 12 projects.

In the same way, if a single person is in two repositories in a cluster, all of the commitments for that person will be combined in a single member report.

How to set up a Repository Cluster.

First, create origin documents for both repositories.

Designate one of these as the Primary Repository and the other as a Member using the “Cluster Membership” Role setting. You must designate the Primary first, because the secondary has to select the name of the primary.

Primary and Secondary Roles.

The distinction between primary and secondary is twofold.

1) All the options for the management of the cluster are set on the origin document of the primary repository. That part of the form is hidden for the secondary.

2) When both repositories contain an identically named item (program, organization, or participant), a change to the name of that item in the primary repository will be replicated to the Observatory, but a change in the name of the same item in the secondary repository will be ignored.

Changes made in the primary repository will always be implemented, but changes made in any of the secondary repositories will only be implemented if there is no corresponding element in the primary repository.

When an element is first defined by a secondary repository, and later added to the primary repository, the logical ownership of that item will be transferred to the primary repository. If the item is later deleted from the primary repository, then ownership will be transferred back to one of the secondary repositories.

OMA Operation

The OMA operates each time the XML Message Processing Agent runs. The OMA process time will vary depending upon how many changes are found. When the OMA runs, it generates a report. This report will be email to the Observatory Administrator if that option is checked in the Administration form.

The report can be created in one of two formats. The choice of format is set in the Administration form. In the standard format, a minimum report is created that provides details only of changes. In the extended format, a much longer report is created which documents each step of the process. The extended format is intended for support purposes. At the top of the report is a section entitled “RECOMMENDED ACTIONS FOR ADMINISTRATOR”. This is a list of items that the repository administrator should review. Following this is information on the repositories and clusters that have been defined. Following this is the actual running log of changes.

Problems that the OMA Identifies to Administrators

If the Origin information is not valid, the OMA will stop with appropriate error messages. Perhaps the database cannot be accessed, or two clusters have been assigned the same parent program. Problems at this level are usually obvious and easily resolved.

RECOMMENDED ACTIONS FOR ADMINISTRATOR

Missing Programs. If a project is assigned to a named program, there should be a Program Profile document in the repository. If this has been deleted, you will get a message asking you to create it.

Missing Organizations. If a participant is assigned to a named organization, there should be an Organization Profile document in the repository. If this has been deleted, you will get a message asking you to create it.

If the “Send To” name used in a repository document is in the internet format, you will get a message telling you to change it to be a normal user name.

If repository programs or organizations documents are duplicated, you will get a message to fix this in the repository.

Understanding the OMA Report.

The OMA begins by examining all Origin documents. It then processes each cluster to completion before going to the next cluster.

Within each cluster, it processes the primary repository first, then each of the secondary repositories.

For each repository it first processes the programs, then the organizations, then the participants.

For each such item, it determines if the repository item is associated with an Observatory item. If not, it will create it. If already present, it then sees if the name of the item has changed since it was last checked. If the name has changed in repository, it initiates a process to make a appropriate change in the observatory.

As part of the same process, manager names and other options are verified and changed where appropriate.

When the process is complete, the observatory will have a program, organization, and member document for each such item in the repository.

OMA Recordkeeping

Each time a Program, Organization, or Member document is modified by the OMA, an entry is placed in the the document's edit log. Using this log, you can see the changes made.

Running the OMA manually

The OMA can be run at any time by an [OBSADMIN] using the "Administrators- Run XML Message Processing Now" action from the Notes client menu. A confirmation dialog will appear. When approved, the process will be run on the server.   Since the OMA function is run at the beginning of this agent, the OMA report will be generated and email before the agent is finished.

Using Custom Overhead Projects

This is a new feature of Observatory. It was created so that actual labor hours recorded for overhead categories could be shown in the Observatory and so that such hours could be projected to provide a more complete picture of resource workloads.

The implementation is to have an “Overhead Project” for each category of overhead labor(e.g., “Vacation”.) This project will then have project commitment documents for each person for whom vacation hours have been reported. These overhead project commitments will then be rolled up into the aggregate report for each individual and organization. While only actual hours will be reported, we have added a facility to allow you to estimate future overhead hours for planning purposes.

To enable overhead tracking you must create one or more “Overhead Category Definitions”. These documents tell the system which overhead categories to collect and make it possible for you to combine several different repository categories into a single observatory overhead project.

Creating Overhead Projects

Overhead projects are created by the system in response to an Overhead Category Definition Form.

To Create a Overhead Category Definition go to the Customize navigator and click on the pencil icon next to the “OH Projects” option.

The Overhead Category Definition Form.

Name: Enter the name for the Overhead Project as you want it to appear in the projects dashboard. It is probably a good idea to name all of your overhead projects in a consistent way such as “Overhead: Vacation” or “Overhead: Travel”.

Category Type: You may have a maximum of one “default” category definitions, and any number of Normal definitions.

Project Number: You must assign a unique number from 1000 to 2000 for this category. If you pick a number already in use, an error will appear when you save the document. This number will be the “unique project id” of the overhead project created for this definition. It cannot be changed. Since 1000 possible numbers are available, you should not have any problem picking one.

Manager name when project is created. This will be the logical manager of the overhead project.

Repository Overhead Category names to be included: This is the list of the repository overhead categories that should be merged into this overhead project. In most cases, you will enter just one name. However, if you have many repository categories, you may want to consolidate them for the Observatory audience. Another use of this is if you have several repositories which have used different names for similar kinds of work.

Overhead estimates for new commitments: This section allows you to “estimate” future overhead hours. The purpose of doing this is to provide a more complete perspective for future resource availability. These hours can be created as commitments, proposals or reservations. They can be created for as long as a year into the future.
Note that these rules will apply to every project commitment created for the overhead project.

One point to note is that overhead categories for vacation and holidays should not be estimated. That is because the “Holiday Reservation” feature will create reservations for all the future holidays that are declared by the participants. So to avoid any possible double counting, it is better not to estimate any category that would be used for reporting holidays.

Skill code setting for new commitments: This allows you to associate a skill code with each project commitment created for this overhead project. This can be useful so that, when labor is tabulated by skill, you can differentiate between overhead labor and unclassified labor.

Special Actual Data Reset for reorganization support: If you ever need to move existing overhead categories from one overhead project to another, there may be double counting of existing data. To prevent this, set this control to "Reset" on all of the projects whose categories are being changed. This setting will clear all actuals from this project once, and then return to the "Normal Operation" state.

At the same time, adjust your repository to resend data for all timesheets. This will cause the system to regenerate all overhead data to correspond with the new category structure.

Using “Default” Category Type

This exists to allow you to create a single Observatory project to gather work spent in every category that you have not explicitly defined. Think of this as the “All other” project. Naturally, there can be at most one of these projects. It is best to create all the other categories first and let the system run for a week or so before deciding whether to create a default project. Most sites will not have a default project, but it is provided as a convenience for those sites which simply want to have overhead totals without any differentiation.

Once you have created your Overhead Project Definitions, you should enable overhead reporting in each repository. This will cause the repository to generate project reports for each category that has been used on timesheets.

Creating the Overhead Projects.

As an administrator, your task is to create the overhead category definitions. The system will create the actual overhead project the first time that a report about one of the specified categories is actually received by the Observatory.

When that has occurred, a doclink will appear in the Overhead Category Definition form linking to the Overhead Project Report form. The Overhead project itself will also appear in the list of projects with the name and manager you have pre specified.

When these reports are received, the category names will be compared to those you have specified in your Overhead Project Definitions, and the labor will be allocated to the correct Observatory Overhead Project.

Reports for undefined categories will be rejected, and will appear in the list of "Rejected Messages". All overhead project reports will be rejected if no Overhead Project Definitions exist.

Renaming Overhead Projects.

To rename an overhead project, go to the Overhead Project Definition Form and change the Name field. The system will change the associated project name on the next processing cycle.

To change the manager of an Overhead project, open the Overhead Project Report and change the manager name at the top of the form.

Organizing Overhead Projects into Programs.

When the first overhead project is created, a new "origin" document will be created called "Observatory Overhead Projects". Open this program assignment (origin) document from the origin worksheet and assign it to the desired program.

You may also associate individual overhead projects with specific program using the program assignment worksheet. Begin at the "Observatory Overhead Projects" section.

If you do nothing, all overhead projects will be assigned to the "Default Program" whose name is specified in the Administration form.

Recap:

To track repository overhead in your Observatory do the following:
1. Create a Overhead Category Definition Form for each category of interest.

2. Activate the transmission of overhead information from the repository by using the Timesheet Overhead Settings on the repository Field Map document, Repository\4... Setup section. Start with "Everyday" and "All" settings.

3. Create a program, if desired for all overhead work. Find the "Observatory Overhead Projects" origin document and assign it to the desired program.

Check the Management - Rejected messages view to see if any categories that are being transmitted by the repository which you have not defined. Add these as new definitions, or create a “default” project definition to accumulate them. The names of the overhead categories are included in the title of the “rejected” message items.

4. Once you have your overhead projects in place, change the repository settings to “weekly” and past 4 weeks to reduce the processing required.

Using The Commitment Authorization Workflow

There is a classic conflict in most organizations between project managers and resource managers. Project managers, in general, like to have complete freedom in allocating resources to their projects as appropriate to optimize the project schedule. Resource managers need to allocate the finite available staff in the midst of conflicting priorities. They also need to deal with the practical factors of hiring, vacations, and career development and of maintaining a reasonably consistent workload in the face of changing demands.

The approach taken by Project Observatory is that the Project Manager may propose, but only the Resource manager may approve. Moreover, that this approval process is not a "yes/no" in most cases, but rather a "you can have this much at this time" negotiation.

This negotiation is done at the level of a project resource commitment, not a project task. Task level approval systems overwhelm the resource manager with hundreds of detail decisions and attempt to force them to commit specific results (which they can rarely really do) as opposed to commitment of resource hours (which they can do).

Negotiating at the project commitment level greatly reduces the number of decisions and focuses both parties on the allocation of resources rather than the intricacies of the specific project work.

The way this works is pretty simple.

Whenever a new project commitment is created (by the project manager), a workflow will be initiated according to the rule set for the particular resource being requested.

During this workflow, the resource manager will have the opportunity to review the request. The resource manager can deny the request entirely, approve it unconditionally, approve it only as currently stated, or limit it to a particular profile of usage.

Naturally, the project manager will be notified of these actions. At that point the project manager can modify the project plan to accommodate the limitations, or work the political process. The project plan is not automatically modified, but notices are sent to the project and program managers that the planned resource commitments were not approved and these notices will continue to appear so long as the project plan is not in compliance with the resource authorizations.

Only authorized work will show on the organization dashboard. This means that, even if a project plan demands 200% of a resource, the resource will not appear overcommitted unless the manager of that resource has authorized the request.

Project mangers can avoid conflicts by reserving resources in advance of needs. Whenever a resource has been reserved for a project, the commitment will be automatically authorized to the level of the reservation without involving the resource manager. This is done because the reservation was already approved by the resource manager, and has already been incorporated into the resource and organization workplan.

Workflow Settings

The workflow for a particular organization or resource is specified in the Organization or Member document in the "General Information" section with the prompt "Workflow."

The default value of this setting for new organizations and members is set in the Administration form.

There are only 4 workflow settings:

None. No workflow. New commitments are immediately authorized, no one is ever notified.

Workflow A: Unless pre-reserved, the manager will be notified. If the manager takes no action, the commitment is authorized unconditionally.

Workflow B: As above, but if no action is taken, the commitment will be authorized only as it is currently requested. The difference is that, if the project plan is changed in the future, and if those changes modify the pattern of resource usage, the increase in usage will require new authorization by the resource manager.

Workflow C: As above, but if no action is taken, the commitment will be denied.

When the organization manager is notified, a timer is started. The time allowed for review is set in the Administration form (Workflow section). It is set to 3 days by default. During this time, the commitment is "pending". A pending commitment is not included in the organization totals and will appear as unapproved (pending) work in the project report.

If the timer expires, the default action will be implemented by the system as proscribed by the choice of workflow method. Note that, as soon as the organization manager responds to the email notice, the commitment will cease to be pending and the timer will be ignored.

Reservations

When the new commitment is assigned to the resource for the first time, the system will check to see if there were any reservations made for this resource that are assigned to this project. If there are, then the commitment will be immediately authorized to the level of the reservation(s) and the project manager will be notified.

Sometimes, however, the system cannot determine if the reservations for a resource are actually for the particular project. This occurs with new projects since there is no way to associate a reservation to a specific project until the project itself exists. In order to deal with this situation, if there are any "unassigned" reservations for the resource, and email is set to the project manager. This email instructs the project manager to examine the existing reservations and to associate any that apply with this project. There is a also timer on this process. If the project manager does nothing (either because there were no reservations or because of inaction), then the system will proceed with the notification of the resource manager. If, on the other hand, the project manager does associate an existing reservation with this project, then the system will authorize the commitment without notifying the organization manager.

Authorization

A project commitment is authorized by the use of the Authorize action button (green check mark icon) on the project commitment document. This button will only appear if the users name corresponds to that of the manager of the assigned organization(or member) or if the user has the role of [OBSADMIN].

A section at the top of the commitment document is labeled "Authorization" and explains the current status.

Clicking the Authorize action will lead to a dialog box or web page offering the following choices:

- Approve unconditionally
- Deny request
- Approve limited to current plan
- Approve limited to specified levels
- Approve limited to existing reservations (Note: This choice will appear only if such reservations exist)

At the bottom of this dialog is a place to enter a reason for this action. A reason is required unless the first option is chosen.

If "Approve limited to specified levels" is selected, a second dialog box or web page will appear which allows you to enter a table of dates and utilization levels. This is very similar to the capacity dialog.

After completing the dialogs, the Authorization section will be updated, the table of commitment hours will be updated and any required messages will be sent.

A limitation is implemented by setting the "capacity" for the commitment. If the "capacity" row does not appear in the commitment table, then no limit has been set.

When a limitation has been placed on a commitment, a new row labeled "Authorized" will appear in the commitment table. This row will show the the "net" hours approved for the commitment. For each week, this will be either the requested hours or the capacity whichever is less.

The total approved and unapproved hours will be documented in the Authorization section along with the username and date of the last authorization action.

Note that the “committed” hours are not changed. Those are the hours requested by the project manager. The “authorized” hours are those approved by the resource manager. The difference can be seen graphically by clicking on the Graphs action and selecting “Work vs. Capacity” in the middle selector.

Limitations also show up in the following places:

- In the list of commitments assigned to an organization as shown in the organization or member report document.

- In the list of commitments assigned to a project, as shown in the project commitment reports section of the project report document.

- In the “authorization” item of the project report document. This also provides a link to generate a report of all limitations.

- In the authorized column of the “Commitments by Project Dashboard”.

Notifications about Limitations

Whenever a limitation is created or changed, the project manager will be notified. Generally the organization manager will also be notified unless that person is making the change. The system avoids sending e-mails to the person causing the email.

Whenever a briefing is done about the project, the limitations will be noted as part of the briefing sequence and as a bullet point on the Exec Summary page.

Whenever weekly reminders are sent to project and program managers, limitations will be noted.

What Project Managers should do about limitations.

It really comes down to one of two courses of action, negotiate for more resource priority or change the plan to use less. If the work is published in a repository, clicking the “TaskList” action on the project commitment report will provide details of the specific tasks in that commitment. Reassigning one or more of these tasks to someone else will reduce the demand on the limited resource. Note that changes made will normally not be reflected in the project commitment until the next day.

It is also possible for project managers to use the “What if” function on the Member report to look for tradeoffs between projects.

Finally, the search system can be used to find other, more available people for this commitment.

Using Photographs and Resumes

There are now library forms that allow you to put a picture and a resume into the Observatory for each Member.

These pictures and resumes will then be displayed as part of the resource search results. This is an simple and very effective way to make the search results more useful.

The picture will also be displayed in the member report, and in resource details pages in project briefings.

Photograph documents and Resume documents are formats of Library documents. They are created by selecting the Document action on the Project, Program, Organization, or Member report. The member report also contains a web link labeled as "[photo]" . Clicking this link will create a photograph library document.

To Create a Photograph Library Document.

> First, get a small scale digital picture of the person as a .gif or .jpg file on your computer.
>
> Next, create a new library document and select the "Photograph" format.
>
> Attach the image file to the document. Do not copy and paste the image. Rather, use the File Attach function from the Notes client, or the Browse button on the form, to select a file. If you simply paste in a bit map, there will be an error created whenever the associated report is opened by a browser complaining that a file was not found. An empty rectangular area will appear where the photo was supposed to go.
>
> Note that the file is not displayed in the photograph document. Rather it is simply a file attachment to that form.
>
> Select the aspect ratio. If the original picture is square, you should select the "square" choice, otherwise pick the aspect ratio that most closely approximates the original image.
>
> Select the Usage. The default usage is "Report Photo". If you will be storing more than one photo for this person (or project) designate one of these to be the "Report" photo and the other as a briefing photo or gallery photo.
>
> Save or Submit the document form.

The "photograph" can be any file that can be displayed by a web browser using an img or embed command. If the file extension is .jpg, .jpeg, or .gif, then <img> will be used, otherwise <embed> will be used when the file is displayed. So you can actually use the photograph document type for pictures, movies, audio files, etc. The users may loose patience, however, if you attach a 10mb movie file to each member report. The display size is defined by the form which displays the picture. However the aspect ratio is defined in the photograph document.

The standard display size in the member report is 80 pixels high by 60, 80, 120 or 160 pixels wide depending upon the aspect ratio selected. The same size is used in the Search Results page. The Briefing title page uses a preset size of 240 pixels high. Image files will be stretched or squeezed to file the display size. Movie files and other media will be clipped.

The Resume Library Document

This is another Library format whose purpose is to hold an attachment. We recommend using a PDF file as the resume since this can be read on any client system and cannot carry viruses like an .html or .doc file can.

To Create a Resume Document.

Create a resume and save it as a .pdf file.

Click on the Document action on the Member Report and select “Resume” from the format selection list.

Attach your resume.pdf file using the File Attach command from the Notes client menu or the Browse button on the web form.

Modify the title field to a short, appropriate title. If will default to the full member name which is a bit long for most purposes.

Submit or Save the document.

When a web search is performed, the word “resume” will appear in the bottom of the qualifications column for each candidate that has a resume recorded.

Resume and Photograph Reminders.

When an skill interview form is created, the email that announces this form will also provide links to create photograph and resume documents if they do not already exist.

Using The Capabilities Dashboard

The capabilities dashboard provides a way to monitor the supply and demand for specific skill in your organization.

The capabilities dashboard view appears on the main navigator. The view uses the same format as organization and member dashboards. Color coded indicators show supply vs. demand for the current week, next week, the next 4 weeks, and the next 13 weeks. Overdue work is shown by the lighting of the progress indicator.

It is important to understand how skill capacity and demand is calculated.

The maximum possible capacity for a skill is the sum of the capacities profiles of each member who declares that skill. This is reduced by the amount of work planned for each member on activities involving other skills. The remainder is the net available capacity. So if I know how to do Notes Forms, but have 25 hours of my time committed to do C programming, and 10 hours to do planning, then only 5 hours of capacity remains to do Note forms.

The demand for a skill is the sum of the weekly work hours for all commitments that are assigned to the skill. If commitments are not skill coded, then there will not be any skill demand.

Because individuals have multiple skills, the capacity will change dramatically when new commitments are created.

For example, imagine that two people, Cindy and Dave, each have three skills SkillA, SkillB, and SkillC.

The capacity for each skill is 80 hours per week.

Now assign Dave to 20 hours per week work on Skill A.

The capacity for Skill A remains at 80 hours per week, but the capacity for Skill B and Skill C both are reduced to 60 hours per week (because only half of Dave could be used.)

Now assign Cindy on 30 hours per week for Skill B.

The Capacity for Skill B remains at 60 hours per week. The capacity for Skill A is reduced to 50 hours per week because only 10 hours of Cindy's time are still unallocated, and the capacity for Skill C is reduced to 30 hours per week.

Note that the capacity for Skill C has now changed from 80 to 30 hours per week with absolutely nothing done involving Skill C. That is because the ability to do Skill C is now limited to 20 remaining uncommitted hours per week for Dave and 10 for Cindy.

Note also that the sum of the capacity for the three skills has changed from 240 to 140 even though nothing has changed and all the work is done on the same skills.

This highlights and important point - you cannot add skill capacities!

If you want to see the supply and demand for skills at a higher level of aggregation, you should define your skills hierarchically. If all three of our skills are a subset of a more general skill "Programing" (Programming\SkillA, Programming\SkillB,Programming\SkillC), then we will have an entry for "Programming" on the capability dashboard as well as the individual skills. In our example, the capacity for "Programming" would remain unchanged at 80 hours/week while the demand rose from 0 to 50 hours/week.

Note also that, while commitments can be made to members or organizations, capacity is created only by the existence of members.

When a skill becomes overcommitted (red level) the manager of the skill will be notified (if the option to do so is enabled).

Clicking on an dashboard entry will open a Capability Report document.

How to Create a Capability Report.

Select Management from Observatory Center, and then click on Customize. This will display the Customization navigator.

The "Capabilities" view icon and pencil icon are at the top of the navigators options.

Click on the view icon to see the list of existing capabilities.

To create a new Capability.

Click on the pencil icon next to the word "Capabilities".

> Email Address for Manager: This should be the person to be notified about over commitments.
>
> General: Select the "kind" of capability this is. If this will be a new "top level" capability, then leave this field empty.
>
> Specific: Enter the name of the capability. Keep the name short, do not include any backslashes, commas, or extra spaces.
>
> Description: Enter enough of a description so that some other person would be able to understand exactly what this skill name is meant to encompass.
>
> Is this appropriate for Project Commitments? Yes/No. Some capabilities are used as attributes of a person, but are not attributes of work. For example, having a masters degree is a very good capability to keep track of, and very useful for searching, but you don't do "masters degree" work in a project. Java Programming, on the other hand, is a skill that will be used in project tasks.

Only these "labor" skills should be used for project commitments.

Optional external name. You can leave this field empty. It is intended for future use.

Options:

Compute Capacity. This is normally checked. When checked the system will add the capacities of members with this skill to create the capacity of the skill. If not checked, then "Capacity" action will be available on the Capability Report form. Using that action, you will be able to explicitly set the capacity for the skill.

Do Not Forecast. This is normally left unchecked. Forecasting will generate e-mails when the future use (beyond 13 weeks) of the skill exceeds the future capacity. These reminders should be useful. This checkbox will disable the reminders.

Notify if Red Indicators. This is normally checked. If any of the four capacity indicators turns red, and email is sent to the Capability manager.

Do Not Show On Dashboard. This is optional. It simply controls whether or not this capability will be displayed in the Capabilities Dashboard view on the Observatory Center Navigator. You should check this if the answer to the "project commitments" question is No. You might want to check this for some labor categories if the commitments or skills have not yet been widely used.

Save or Submit the Form

Now that you have defined a new capability it can be used in several places.

You can assign the capability to one or more members. This will be done via the skill questionnaire process, or alternately, you can edit the member document and check the skill in the Capabilities section.

You can assign the capability to one or more existing project commitments. Use the "Dashboard -Commitments by Project" View from Observatory Center. This view will list commitments for each project and show the name of the associated skill. Open the project commitment document and click the "Skill" button to select one of the allowed skills. Normally, the project manager will be asked to make this decision in a project skill questionnaire.

You can search for people having this capability using the "Search" function. Simply check the capability name in either the mandatory or preferred section of the form.

The capacity and usage of the capability will be computed by a system agent. This will generally be done each evening. Until this has happened the first time, the dashboard will not show any colored indicators.

The Capability Report Document

Heading: The heading shows the capability name, the manager name, and the photo if one was provided. Note that photos only appear in a web browser, not in the Notes client.

General Information: This section show the description, project commitment enablement, external names (not used), and selected options. This information may be edited.

Members with this capability: This section lists the names of the member reports that have checked this particular capability in the "Can Do" section.

Documents and Reports: This section lists any Library documents associated with this skill. This might include training plans, what if outcome documents, etc.

Commitments: This section shows the planned, proposed, reserved work using this capability and the capacity for the skill.

Statistics: This shows the use of this capability for various time periods.   Note, the system does not keep historical data on capability use.

Actions available on the Capability Report.

Graphs. This will bring up the Observatory Explorer to show various perspectives on the labor data including work vs. capacity.

What If. This will bring up the What If Options page to let you explore various alternatives in the usage of this capability.

Document. This will allow you to create library documents that will be associated with this capability.

Gantt. This will generate a Gantt Chart in PDF format that will show the commitments made for this capability. There will be one row for each commitment or reservation. The row number on the chart is hyperlinked to open the commitment or reservation document.

Global Change. This will allow you to change the name of the capability. A dialog box or web page will appear to allow you to enter a new name. Once confirmed a message will appear in the Report stating that a name change is pending. The name change will be implemented by a system agent during the night. Shows only in Edit mode in a Notes Client, in read mode in a web browser.

Note: Global Change changes only the specific capability. It does not change others, even if they have interrelated names. If you want to change a group capability name, you must make the change to the group level and to every member of the group. e.g. if you have "Programming","Programming\Notes", "Programming\C", you must use the Global Change function on all three documents.

[Finger with String] icon. This icon will create a Favorite for this Report. This will allow you to get to the report with one click from the Locator page of the database. Web Only.

[++] icon. This will redisplay the form to open all collapsed sections. Web Only.

Close. This will close the document. Notes Only.

Using The Custom Report Generator

The protfolio report generator creates tabular reports using data found in projects, program, organization and members. The selection, columns, time period, and output format are quite flexible. Most all of the systems project and program fields are accessible, including those created for custom fields. There is also provision for including data from fields created by user modifications.

The system consists of a new class of custom documents called "Custom Table Definitions" and report generator function that can be activated from a number of different places in the Observatory user interface. All reports are generated in response to web URLs. Hence, reports can be bookmarked in browsers.

Running a report in the Notes Client will have the effect of opening a web page for the results.

Standard and Custom Report Table Definitions.

The system predefines 4 report formats. These are available at all times, even if no custom reports have been defined.

The predefined formats that may be used for Projects and Programs are:

Predefined System Format 1 (Dashboard)
This generates a table very similar in appearance to the project dashboard view which includes the following columns:
Subject, Time(icon),Effort(icon),Cost(icon),Progress(icon),Issues(icon), Events, Issues, Asg Count, Asg Overdue, Overdue(hrs), Act Hrs, Total Hrs, Ref Work, Manager, As Of.

Predefined System Format 2 (EV)
This generates a table showing the various earned value parameters for a collection of projects. These include the following columns:
Subject, BAC, EAC, BCWS, BCWP, ACWP, SV, CV, SV%, CV%, SPI(E), and CPI(E), As Of.

The predefined formats that may be used for Organizations and Members are:

Predefined System Format 1
This generate a table very similar in appearance to the organization dashboard view which includes the following columns.
Subject, 1W(icon), +1W(icon),+4W(icon),+13W(icon),Overdue, Act Hrs, Total Hrs,Manager, As Of.

Predefined System Format 2 (26 weeks)
The generates an 26 week iconic dashboard starting with the current week. Each individual week has a supply/demand driven icon. The first column is the Subject name and the last column is the As Of date.

Custom Reports require Report Table Definition documents.

To create a Report Table Definition:

Click the pencil icon located next to the "Reports" item on the Customize Navigator.

Name: This is a name for the report definition (it is not the title of the final report). Every definition needs its own name.

Title: This text will appear at the top of the generated report. If left blank, a default heading is provided.

The Content Table:

The content table consists of a 20 position table that is used to specify the contents of each column of the report. Each column is numbered 1-20. To the right of the column number is a field which provides for the selection of a particular field of Observatory data. There are about 150 choices which are listed in alphabetic order in the droplist or keyword selection box. Some of these have {clarification} in braces. The text is braces is simply for your information and does not print on the report.

In most cases you will want to pick "Subject" as the first column. This will show the hyperlinked name of the project, program, etc. of that row.

Sort: You must pick a column for sorting the report data. Usually this will be column #1, but it can be any. At the right, select an ascending or descending sort direction.

Filter: Six rows provide you with the ability to limit the contents of the report to projects, etc. that have particular properties.

Number Fields.
There are two rows where you can select "number fields" typically things like act. hrs. and include projects only if the value meets a particular condition.

The conditions are:
Is Available, Is Not Available, Greater Than, Equal To, Less Than, and Within 25%.
For the last four choices, the value field allows you to enter a number for comparison.

Example. You want to report for only those projects that have actual work of at least 100 hours. You would set the "Act. Hrs", "Greater Than", and "100" into the row.

If you wanted to further limit the report, you might set the second number filter row to: "Act Hrs.", "Less Than", "500".

This would limit your selection to projects with between 100 and 500 actual hours.

Date Fields.
There are two rows where you can select “date fields”. typically things like “End On” and include projects only if the date meets a particular condition.

The conditions are:
Is Available, Is Not Available, Greater Than, Equal To, Less Than, and Within 30 days of.
For the last four choices, the value field allows you to enter a date for comparison. Your date must be entered in the ordinary format (6/12/2003) for the local of the server (if web) or client (if Notes).

Text Fields.
There are two rows where you can select “text fields”. typically things like “Subject” and include projects only if the text meets a particular condition.

The conditions are:
Is Available, Is Not Available, Contains(case blind), Does Not contain(case blind), Contains(exactly), Does not contain(exactly), Is Equal To (case blind), Is Not Equal To(case blind), Is Equal(exactly), Is Not Equal To(exactly), Sorts with or After, Sorts With or Before.

Usage. This set of 5 check boxes controls whether or not the report is appropriate for a particular collection of entities. The choices are Projects, Programs, Organizations, Members, and Skills. This is used to limit the set of reports offered when a report is to be generated to those which are appropriate to the subject matter. You must set at least one checkbox in order to make the report available.

Save or Submit the form to record the new definition.

To Modify an existing Definition using the Notes Client:

Open the definition document into Edit mode.

At the top of the form you will see two actions “Ins” and ”Del” . These actions allow you to insert and delete existing columns from the table.

Press Ins or Del, you will be given a simple dialog box to select the row number where the insert or delete is to be done. Select the row and press OK.

If you use Ins, the existing content of the row, and all subsequent rows, will be shifted downward by one row. The existing row will then be available for data selection.

If you use Del, the contents of the existing row will be removed, and all subsequent rows will be shifted upward by one row.

You can change the content of any row by simply clicking the droplist for that row and selecting the new data.

Empty rows will be ignored when the report is prepared, so it is not really necessary to pack all of your data columns together.

Save the document when your changes are complete.

To Modify an existing Definition using a Web Browser.

Open the document from the view for display.

Next to each column number you will see "INS" and "DEL". Clicking any of these will insert or delete at that column position and redisplay the form after the change has been made.

To make other changes, click the "Edit" action.

When done, press Submit.

Creating Reports

Running reports from the Report Definition form.

At the top of the report definition are action buttons which will run the report. If the usage of the report includes Members, then a "Members Report" button will appear. If the usage includes Projects, then a "Portfolio Report" button will appear.

When you edit and record the report using a browser, a series of links will appear, again, these are dependent upon the specified usage.

Run Report Now with Options (this is the same as "Portfolio Reports")
Run Report Now On All Projects
Run Report Now On All Members

Clicking the link or one to the action buttons will initiate the report process. If "with options" or "Portfolio Reports" is used, another dialog will appear. If Members Report or All Projects is used, then the report will be generated immediately.

Portfolio Reports

Portfolio Reports can be initiated from the "Portfolio Reports" icon on the Analysis Navigator, or from a report definition document who usage includes "Projects".

When initiated, an options selection page appears . When completed, the user press "submit" if using a browser, or "Run Report" if using a Notes client, to generate the report.

The following options are provided:

Select Report Definition
This will list the system predefined formats and all of the custom definitions that support usage on Projects.

Select Output Format. This will allow you to select the way the results will be presented.

- As Web Page
- As Web Page for printing (all hyper links are removed).
- For Spreadsheet (w/column labels). This will generate a .csv (comma separated) formatted file that can be loaded into MS Excel and other spreadsheets. The first row will have the column headings.
- For Database (w/o column labels). This will generate a .csv file consisting only of data rows.
- As XML document. This will generate a file in XML format with an embedded Document Type Description. If an XSLT stylesheet has been attached to the report definition, that stylesheet will be used by the browser to format the results. If no stylesheet is provided, a file is returned.
- As Gantt Chart. This will not generate a report at all. Rather, it will use the report definition filter rules and the project selection rules to select a set of projects. This set of projects will then be displayed in a Gantt Chart created in PDF format.

Select Timeframe. This selects whether you want to see current or historical results. Remember that Observatory snapshots all project, program, organization, and, optionally, commitment reports each week. Hence historical data is available. This selector offers the choice of current data (Now) or data as it was recorded at dates in the past (1 week ago, 2 weeks ago... up to 2 years ago.) If data is not available at the time selected, the next most recent data will be provided. Note that the “As Of” column will show the actual reporting date for each project row.

Project Selection Rules. These five options allow you to select projects in convenient ways. Note that projects which are allowed by these selections must also pass the “Filter” criterial specified in the Report definition in order to be included in the generated report. If none of these selection rules are used, then all projects will be candidates for the report.

Project must be in Program. This will list all Observatory Programs. You may select up to 4 programs. Note that, when you select a parent program, you are selecting all the projects that below to that program and any child program. Thus, selecting “Development” and “Development\Research” will be the same as simply selecting “Development”. However selecting “Development\Research” and “Development\Testing” will collect projects from both groups.

Project must be assigned to Manager. This will list all project manager names. You may select up to 4 names. All the projects assigned to all the selected managers will be included in the report. Simply selecting your own name will generate a report showing only your projects.

Project must be at Location. This will list all defined locations. You may select up to 4. Only projects marked for one of these locations will be included.

Project must be in Scenario. Scenarios are defined in the administration form. Projects can be assigned to scenarios using the "Classify" function. This function allows you to limit the report to projects which belong to a specific scenario.

Project Status must be: Projects have a status (Approved, Proposed, Finished, etc.). You may select any combination of status conditions. Only projects which fall into one of these selected conditions will be included in the report.

Once you have selected the options for definition, format, timeframe and project selection, you may run the report using the "Run Report" action in the Notes client or the "Submit" button on the web form.

Generating Custom Table Reports based upon individual Projects, Program, Organization, and Members.

Project, Program, Organization, and Member reports all contain a section entitled "Documents and Reports"

In the "Documents and Reports" section, you will find links to create custom table reports. In a Project, Program, or Member report, you will find a link labeled "Click Here for Custom Tables". In an Organization Report, you will find this as well as another link labeled "Click Here for Custom Member Tables".

Clicking one of these links will display the the "Custom Table Generator Options" form.

Custom Table Generator Options

This form has only three selections: Report Definition, Output Format, and Timeframe. Of these, the first two are the same those discussed under Portfolio reports. Note that the selection of choices available for definitions will depend upon the kind of entity.

Timeframe.

By default, the report will contain one row for each historical period for which data is available. Hence, you will see the evolution of all the reported information over the life of the project, program, organization or member. You may limit this lookback period, or select a particular time in the past for comparison with the present. The timeframe choices include "Past and Present" (the default), "Today" (current data only), "Past 2 (4,8,13,26,or 52) weeks", and "Today and (1,2,3,...) weeks ago", and "1 (2,3...) week ago only"

Custom Member Tables.

This function will also display the "Custom Table Generator Options", but only the Report Definition and Output format options will appear. A report about the members of an organization shows only the most recent data for those members.

The AS OF column.

The AS OF Column is hyperlinked in most reports. This will regenerate the report showing only the specific project, program, organization, or member. The new report, however, will show that project or member in all historical points of time that are available. Think of it as a Time zoom!

My Reports

The My Reports facility is a special application of the custom report generator. Web users will find links labeled "My Projects, My Programs, My Organizations, and My Members" on the Observatory Home page. Notes users will find these on the "My Reports" navigator (click the "My Reports" tab on the main navigator).

Home Page Reports

Clicking "My Projects" will show a report about those projects which are managed by the current logged in user and those projects which are "favorites" of that user. The report format used for "My Projects" is preset by the administrator in the Administration form. This will normally be one of the predefined system formats, but it can be set to be any of the custom reports defined in the Observatory.

If the user is not a project manager, then only that user's "favorites" will be shown. If the user has no "favorites", the report will be empty.

Note: To make any project, etc. a "favorite", open the project report and click on the "finger with string" icon at the top of the form. Submit the resulting form and you will have a new favorite. To show your favorites, open the "Locator" page. To remove a favorite, click "remove" next to the favorite name on the Locator page.

Locator Page Reports.

At the bottom of this page is a section entitled "Custom Report about:" followed by a line contain linked tags labeled "My Projects, My Programs,... etc." These links return the "My Report Options" page. This allows the selection of any report definition and the choice of Output formats. Hence using this tool, you can generate reports about those things that you manager (augmented by your favorites) in any format.

My Reports Navigator Reports.

Notes client users will find these links on the "My Reports" Navigator. Again, these will display the My Report Options page in a browser window. Submitting the form will generate the report.

Using The Instant Gantt Chart functions

On of the most obvious changes found in Version 3 is the presence of Gantt Chart action button and links though out the system.

These on-demand chart actions are in addition to those provided by the "Presentation" functions on the Observations navigator. Those charts are generated and maintained by periodic background processes. The user has great control over the appearance of these presentations though the use of the chart definition document. In contrast, the On-demand Gantt charts are automatically formatted to a predefined look and feel which is not user adjustable.

The Gantt chart actions are enabled for both Notes and Web clients. In both cases, the chart is generated as a PDF file. You need to have an Adobe Acrobat viewer on your workstation to view the charts. Properly installed, the creation of the chart should activate the PDF viewer.

Gantt Charts depict the time spread between the beginning and end of some activity. Each row of a Gantt chart is a separate commitment, project, member, reservation, etc. The first column of the chart is a "row number". In most cases, this row number will be hyperlinked to the database. Clicking the row number will open the document associated with that chart row.

The titles on each row will identify the associated document. For space reasons, the resource name alone is used on commitments. So a Gantt Chart of a project will list the names of the project resources. Reservations are always identified as such.

On Program Gantt charts, each row will be a project. Note that project reservations are not included in program level charts.

On Organization Gantt charts and those for Organization Members and Capabilities, each row is a project commitment or reservation. Project commitments on these charts are identified as "resource " on "projectname".

Color coding.

Gantt charts are color coded to show the point at which the "actual" data ends and the "planned" data begins. There is also a vertical red line showing today's date.

That portion of an element which is complete is in blue. The unfinished portion is shown in red.

Timescale.

The chart timescale is determined by the span of the data. The beginning and ending of all bars will be shown. As the time span extends, the timescale units are enlarged from weeks to quarters.

Special Gantt Charts

Project Milestone Gantt Charts

In the "Documents and Reports" section of each Project Report is the link "Click Here for Project Milestone Gantt". This will generate a chart where each row is one of the milestones of the project.

Completed milestones are shown as blue diamond. Unfinished ones are shown as red diamonds. Milestone rows are not hyperlinked because there are no documents associated with them.

Program Milestone Gantt Charts

In the "Documents and Reports" section of each Program Report is the link "Click Here for Program Milestone Gantt". This will generate a chart containing all of the milestones of each of the projects in that program.

The project rows will be represented by "summary" bars spanning the milestone dates of each project. The row numbers of the project rows are hyperlinked to the project reports. Under each project summary will be one row for each of the milestones of that project. The milestone rows will be indented and printed in italics.

Dependency Lines on Milestone charts.

If there are "Interproject Dependencies" that affect a milestone, a line will appear to the left or right of that milestone.

If the dependent milestone is on the same page of the chart, then the line will be drawn directly from the right side of the controlling milestone to the left side of the dependent milestone.

If the dependent milestone is on another page, the row number of the connecting milestone will appear in small print near the end of the line.

If the dependency is to a milestone which does not appear in the chart, and * will appear in place of the number.

The color of a dependency line indicates its status. If the line is green, the dependency is valid, if the line is red, the dependency is in violation. If the line is gray, the dependency is no longer relevant.

Interproject Dependency Gantt Charts

Open any Interproject Dependency and select the Gantt action. This will produce a chart showing the milestones of the two projects involved. All of the dependencies between them will be drawn with connecting lines.

What If Outcome Gantt Charts

Gantt Charts can be generated from the link provided on the Web Outcome page, or from the Gantt action on any WhatIf Outcome Library document.

These charts differ from the regular Gantt charts in several ways.

First, actual work is never shown. Only the “planned” part of a commitment will appear.

Second, each Gantt bar will be split into two layers. The upper layer is rendered in gray and the lower layer is rendered in green. These represent the “before” and “after” schedules for this item. In most cases the “after” schedule will be displaced from the “before” schedule. This allows you to see the schedule changes you have proposed.

For those items which represent new work and so do not have “Before” dates, only a single full height bar is generated.

Using The WhatIF? Functions

The WhatIf? facility allows you to evaluate the impact of changes to schedules and commitments in a convenient interactive graphical process. The results of this process can be recorded for later use. The Observatory WhatIF? tool lets you manipulate resources and projects at a management level to examine alternatives. With WhatIF you can shift, stretch, resize, and reshape your existing and potential commitments like putty and graphically review the impact of of a collection of simultaneous changes.

The WhatIF? facility can be used by both Notes Clients and Web browsers. Since in does not change the Observatory data, anyone can use it.

The WhatIF? action button appears on every Project, Program, Organization, Member and Skill Report.

When the button is pressed, the system prepares a list the sources of planned work for the selected subject. For example, the work for a member would be the list of all the commitments and reservations for that member which had any remaining work. Commitments which are fully complete are ignored, since there is nothing that can be changed.

The time required to prepare this list will vary depending upon the level of the subject and the number of contributing reports.

Once this list has been prepared, the system displays the “What IF” options page. This page is your control panel for creating alternatives.

When you have made your changes, you press the Evaluate button.

The Evaluate action tells the system to recompute the workload for the selected subject, taking into account your proposed changes. The system will display the “Outcome” page.

The Outcome page contains an interactive workload graph, a detailed list of all changes made, and action buttons or links. One action will create a Gantt Chart. Another will save the outcome as a library document.

The user will generally create a number of outcomes in one session as they play with various possible changes to the workplan.

The WhatIF Options

The WhatIf Options page contains three major sections.

1. Changes to existing commitments and reservations.

2. Proposed new commitments.

3. Other options.

Selecting Commitments.

Each row of the table begins with a subject selection. The items shown in the list will be those which contribute to the remaining work that subject. In addition, there will usually be items labeled “All Other Commitments” and “All Other Reservations”.

What is a commitment.

A commitment is a profile of work specified as a set of weekly work hours extending over some time period that may be anything from one week to many years. A commitment in this sense can be of committed(yellow), proposed(blue), or reserved(purple) work.

How a selected commitment can be transformed.

The WhatIf tool provides five ways to change these work profiles.

1. Include, Adjust, or Exclude the work from the outcome. Normally “Adjust” is chosen to enable the transformations defined to the right or Exclude to remove the commitment from the outcome. “Include” allows you to revert the the existing commitment without having to reset the transformations.

2. SHIFT. This shifts the “start date” of the commitment by some number of weeks either out or in. This simply slides the commitment along the timeline without changing the pattern of work.

3. STRETCH. This allows you to stretch or squeeze the commitment by moving the endpoint while preserving the total work. When you squeeze the commitment, each week will be increased by some factor to allow the total work to be kept as planned. For example, if the commitment was for 10 weeks at 20 hours per week, if you squeeze it by 2 weeks, it would be 8 weeks long and 25 hours each week. When you stretch the commitment, the weekly work hours will decrease. The pattern of the commitment will be retained.

4. EFFORT. Inflate or Deflate the work by increasing or decreasing each period by some percentage. Again, the pattern of the work will be retained.

5. SHAPE. Reshape the work. This retains the endpoints and the total effort, but changes the weekly pattern. There are several predefined patterns that you can select such as “Flat” or “FrontLoaded”.

These transformations are applied in a specific order. First the start date is moved. The the end date is moved. Then the effort is adjusted. Then the commitment is reshaped.

Note that, when “All Other Commitment” or “All Other Reservations” is selected, the transformations are applied to each implied commitment individually.

Creating new commitments.

You may create up to 4 proposed commitments. For each you specify the name, the start (relative to now), the duration, the effort, and the shape. The system will compute the effective work profile and display it as part of the outcome as “proposed” work. Up to 100 man-years of work can be created for each proposed item.

Additional Options:

Filtering:

Include only those commitments listed above

One option allows you to include only the commitments that you have explicitly selected. This allows you to show a single commitment, or any specific combination, in isolation. Simple select the commitment, click the “Include only those commitments listed above”, and press Evaluate.

Allow Projects in all Scenarios

The Scenario filter lets you restrict the outcome to include only work from projects in a particular scenario. As you may recall, a scenario is a named collection of projects created on the administration form. Individual projects may belong to one or more scenarios. The selection is done using the Classify action on the project report. Scenarios can be used for any purpose. On possible use is to define “base budget” and “requested budget” project collections.

Staffing:

The staffing selector allows you to add or remove staff from the current capacity at two different points in time. You can add or remove from 1/2 to 10 FTE (Full Time Equivalent) people at each point in time. This allows you to see the impact of proposed hiring or reductions on the workload. Staffing changes can be made even if no other transformations are selected.

Overdue Work Modeling:

The Overdue work rule allows you to model various scenarios for dealing with all work which is still scheduled in the past. Of course, you really should not have such work, but if you do, this tool will allow you to reallocate it.

The system offers the following alternatives.

1. Leave in past. This work will be included in the outcome, but will remain at the same time as currently recorded. Note that, if you specify a “shift” on a commitment that has overdue work, the work will be split into two parts. The overdue part will remain where it is, and the future part will be moved to the new starting date. This models the “I don’t want to deal with this now” scenario.

2. Remove from plan. This will delete all overdue work from the outcome. Each

deletion will be documented in the results. This models the "put head in sand" scenario.

3. Shift work start to next week. This will find the first week of overdue work and then slide the entire commitment out in time until that first week has moved to next week. This models the "we will restart where we left off" scenario.

4. Redistribute over 1,2,3, ...12 weeks. This will take the overdue hours of each commitment and load those hours evenly over a series of weeks starting with next week.   This models the "we will catch up during the next few weeks" scenario.

Note that the overdue work adjustments are made before the regular transformations are applied. So if you chose "Shift work start to next week", for example, you can still adjust a particular commitment to delay that start by an additional 4 weeks, etc.

Authorization Modeling:

Anytime authorization has been applied to limit the workload, it may be very useful to be able to see what that workload would have been if the limitation had not been applied. Conversely, while projects normally show requested workload, it can be useful to see only the authorized workload.

"Add requested effort in excess of authorized levels"

If this is checked, then all limitations that have been made on project commitments in the workload will be removed in the outcome. If not checked, those limitations will be retained. Normally an organization shows only its authorized workload, so checking this option will tend to increase the workload in the outcome compared to the totals in the organization or member report. Normally a project shows the requested level of work. If this option is not checked, the workload in outcome will tend to be lower than shown on the project or program report.

"Add effort from project requests pending review"

When the resource authorization workflow is used, there is a brief period, usually no more than 3 days, during which new commitments are hidden from the totals of the assigned organization or manager. This is the "pending review" period.   By checking this item, those commitments, if any, will be included in the outcome.

The Outcome Page

The evaluation of a WhatIF Options page creates the "Outcome" page. This is a document created for display purposes, it is not stored in the database. You can store the results if you want to using the "Save as Library Document" action.

The outcome incorporates Observatory Explorer to present various workload graphs and a text listing that details all the adjustments which have been made in computing the outcome.

The outcome page will open showing either the graph or Work for the current year or a graph of Work vs. Capacity for the current year. You can change this to show other time periods using the right side selector. The work graph will be shown if there is no capacity defined.

The capacity shown in the outcome will be the current capacity set for the member, organization, etc. adjusted by the staffing options. In many cases, projects and programs will not have a "capacity" preset, so these will appear as work graphs. You can, however, create a capacity using the staffing option. This allows you to see the work in the context of a preset team size.

The work will be the sum of the reserved, proposed, and committed work . The graph is color coded to show these categories. If capacity is shown, the unused capacity is green and the over commitments are shown in red (regardless of whether they are caused by commitment, reservation, or proposal.).

Since the work shown is a total, you might need to determine the components that make it up. This has been pre calculated for you as a series of 5 pie charts. You may display these using the left selector to select "Pie Charts" and the middle selector to select the time period.   Each pie chart shows the breakdown of workload for a 4 week period into the specific commitments and reservations that compose it. In most work, the bulk of the workload at any given time will be from a very small number of overlapping activities.

Yet another way to identify the commitments is to use the "Gantt Chart" action on the Outcome form. This will generate a Gantt chart showing each commitment or reservation as a row. The Gantt bars will be split to show the "before" and "after" schedules. The before schedule bars (the gray ones on top) are the current plan, the after bars are the green ones which show the effect of the selected transformations.

You can display the individual classes of the work using the middle selector.

To see how the workload has been changed by your transformations, you select "Work vs. Reference". Reference, in this case, will be the existing remaining workload for the selected subject.   (This will be exactly the workload you would see by selecting "Work Remaining" using the "Graphs" action on the selected report.)

On the Work vs. Reference display, the red area shows where the weekly workload in the new outcome exceeds the current plan. The green area show where is it less than the current plan. Shifting a big commitment by 4 weeks, for example, will tend to create a 4 week green area where the commitment had been, and a red area where the commitment has been moved to. Inflating a commitment by 50% for example, will create a red area along the entire length of the commitment.

The Work vs. Reference display is very useful when you are interested in seeing how one commitment appears in the context of the current workload. Simply select the individual commitment, set the "Include Only" checkbox, and evaluate. Select the Work vs. Reference display and you will see the commitment against the background of the current workplan.

In most cases, if you simply click evaluate on the options page and then show Work vs. Reference on the outcome page you will see that the results are unchanged. However, there are two possible exceptions to this which can cause differences to appear.

1. If you are evaluating a project or program with limitations, and have checked the authorization options, then the "unapproved" work will show in green, because the current work includes the full requested amount.

2. If you are evaluating a project with reservations, the reservations will normally be included in the outcome, but will not be included in the project work plan. Hence you will see red areas representing the reservations.

3. If there have been changes made to the reservations or commitments since the subject report was last recalculated by the system, then these will show up as differences. The most common cause is reservations made during the current day. Note that the WhatIf outcome always uses the very latest information for both capacity and demand. It is only the "reference" data that may be a few hours out of date. This feature can be turned into an advantage. If you want an "up to the minute" workload plan for any report, just click "What If" and then "Evaluate". This will recalculate the report totals. The Work vs. Reference graph will show the the yet unrecorded changes.

Saving the Outcome Results in the Library.

The "Save as Library Document" action will create a library document. This document is automatically associated with the original report document. The Outcome document contains the information shown in the graph, the information used to construct the Gantt Chart, and the complete text of the "Adjustments" listing. The title of the Outcome document will contain the date of its creation.

The Outcome document will be opened for you to edit if you would like to add any comments, or change the title.

The Outcome Library document will have three special actions. Graphs, Gantt, and Tables. The Graphs and Gantt functions simply reconstruct the displays provide in the Outcome results. The tables function will display the week by week workload in numeric form.

Note that you can create any number of Outcome documents associated with a single project, program, member, suborganization, or capability report.

What Next!

The WhatIf tool allows you to explore alternatives. Some of those are easier to implement than others.

Changes to reservations, for example, can be made by the manager of the reserved organization using the Adjust action button on the reservation document.

Changes to commitments, if they involve only reductions, can be made by the authorizer using the “limit to specified capacity” options. Other changes must be made by the project managers in the originating plans. Obviously it is a lot easier to “squish” the workload than to change the collection of project tasks to achieve that result. If the required change is confined to a short time period, the project leader may be able to use the TaskList function on the commitment document to identify the tasks creating the workload and then use the search function to find a alternate candidate for that task. Once someone identified, the task can be easily reassigned.

If massive changes are needed, serious effort will be required for replanning and resequencing at the project level. The benefit of the WhatIf process is that management can evaluate many scenarios and choose the way forward without investing the very substantial effort of detailed replanning.

Using the Holiday Reservations Facility

1) People will take vacations and be unavailable at various times.
2) These interruptions will impact your project work.

Naturally, the better your visibility is to such interruptions, the less likely that they will seriously impact you.

One of the primary functions of the system is to make it easy for individuals to declare these periods, and easy for relevant managers to be aware of them.

There are two basic sources of holidays. One source is the work location. An US employee will have a Thanksgiving holiday while a European employee will not. A particular plant site may have a two week shutdown which affects those employees but not others.

The other source is the individual. Whether it is a annual vacation, family leave, or the need to be at a trade show, one person's plan of absence is unlikely to be exactly the same as anyone else's.

The holiday reservations facility is an integrated facility which combines information from Project Gateway and Project Observatory.

The output of the holiday reservation facility is one reservation document for each member (i.e. repository participant). In this one document will be a "holiday work profile" and a text list of all holidays. The work profile shows planned holiday hours per week for as far into the future as they have been declared. This profile will be updated every day to incorporate any changes. If no holidays are declared then the reservation document will not be created. If the last holiday is deleted, then the reservation will be removed. Otherwise this one reservation document will persist for as long as the member is in the system.

Individual holidays are declared as a day or a contiguous group of days. The reservation is recorded in terms of hours per week, but is calculated based upon the specific days reserved and the specific capacity for that member for the specific week in which those days are reserved. Even if a holiday is declared twice, it will only be counted once.

The holidays for a member as determined as the sum of the repository holidays and the observatory holidays for that member.

The repository holidays are the sum of all of the "Schedule" items on the participant profiles for all the repositories that include that participant. If "Tom Applegate" appears in two repositories, then the system will merge the holidays declared in the first repository with those declared in the second repository.

The observatory holidays are the sum of the Member "Schedule" items (if any) and the Location "Schedule" items for all the locations to which the member belongs and all the hierarchy of those locations. This is simpler than it sounds.

If Tom is assigned to "USA\California" then the system will merge the holidays from three sources: 1) The "Tom Applegate" member document 2) the USA location document, and 3) the USA\California location document.

Notice that this means that, if you define the national holidays on the USA location document, they will be automatically enabled for every member whose location a subset of USA.

Note also that location codes do not really have to be physical locations. They can be department codes or even labor contract codes.

The Holiday Reservation document, then, will represent the merging of all holidays from all of these sources for the particular member. When you open one of these documents, you will see a text description of all of the holidays enumerated by their source. Thus, an error in holiday entry should be very easy to correct.

The Holiday reservation process can optionally update each repository with the complete list of holidays. This "two way" update must be enabled for the repository on the Origin Document. When it is enabled, the participant profile will for each participant in each repository will contain two holiday lists. One will be the list of holidays declared locally in that repository and the other will be the collection of holidays declared by the Observatory and other repositories. Both will appear on the "Schedule" form, but only the locally declared holidays can be edited or removed by the Participant.

All the holidays that are in the participant profiles will be exported to Microsoft Project if the "Export Holidays" function is used. Thus, your MS Project plans can easily include all the holidays that are in your Observatory Holiday reservations for all the people involved in the plan. This then makes it possible for the project leaders to avoid committing people when they are not available.

So what does all this mean in an operational sense? First it means that you can take care of all the standard holidays using the highest level location document. Second it means that participants need only declare their holidays in one place.

Everything else, from observatory reservation search to MS Project scheduling to the various repository reports will be driven from this common data. Note in particular that the repository calendar report for every project, every program and for the organization that the participant is a part of will show all of the holidays.

One common question is whether the participant requires "permission" to declare a holiday. The current implementation does not. If an abuse problem develops for an individual, the recommended solution is remove the edit rights of that person from their own participant profile and let the manager use the "Schedule" function on the Observatory member report to declare only those holidays that they which to approve.

Note that only "future" events are maintained in the holiday reservations. Holidays, like other reservations, are never "overdue".

Actual time for standard activities such as vacation and family leave is captured on timesheets as it occurs and is then reported in Observatory as actual time on commitments to specific overhead projects. Since such projects only show actual hours spent, and since holiday reservations only show future hours reserved, the two mechanisms complement each other to provide a complete picture of the work hours of each individual.

The list of all of the [Holiday] reservations can be found on the "Reservations by Requester" view on the Analysis navigator. The "Requester" for all [Holiday] reservations is "Agent".

Note: If one of these reservations is deleted, it will be reconstructed automatically by the system.

Operations for each repository is controlled by the "Participant Reservation Synchronization" settings in the Repository Origin document.

There are only three possible settings for each repository.

1. No Action.
2. Reserve holidays in the Observatory only.
3. Reserve holidays and also update the repository with any additional holidays defined in the Observatory or other repositories.

Note: All of this functionality is created by the "Maintain Holiday Reservations" agent. This agent should run nightly.

Using the TaskList Function

This is a very simple and quite useful feature. On each project commitment document there is a new action labeled "TaskList". Clicking this action will generate a web page report containing a detailed listing of the Project Gateway repository tasks that are included in this particular project commitment.

The result is entitled "Repository Task List" and is subtitled with the name of the participant and project. Following this is a table with the following columns. Taskname, percent complete, actual hours, remaining hours, total hours, reference hours, actual start, actual finish, scheduled start, scheduled finish, reference start, reference finish. Overdue schedule dates are flagged in red.

In some cases, actual dates are marked with an * symbol to indicate that the total shown is the timesheet data rather than the assignment actual work summary data. The timesheet data is used for reporting work to Observatory if there is a difference in the two values.

TaskList works for commitments from current projects in Project Gateway repository databases. It does not work for projects in Observatory reporter (because there is no task plan available). It does not work for projects directly reported by MS project (because there is no way to access the client software files from the server). It does not work for "Overhead" projects because there are no assignment documents to report on.

If the commitment from a web enabled repository source, the project commitment is simply redisplayed. No error message is produced.

If the project is complete and has been archived from the repository, the Tasklist will not be available.

In order to use this feature, the user must have the right to read the assignment documents in the PG repository as well as in the Observatory. You may be required to log in during the process.

Note that the links displayed on the Repository Task List page are to repository assignment documents.

If you use this function from a web browser, you might want to open the TaskList in a new window by using a right mouse click. If you are using a Notes client, the web page will be in a new window in every case.

Skill Interview Enhancements

The Observatory collects skill coding information using an interview process. Normally the participant is interviewed to create the skill inventory and the project leader is interviewed to collect the skill for each commitment.

Some changes have been made in this process.

First, the Interviewee name for the Member report is now separate from the manager name for that report. This allows the participant to be interviewed, but not receive any other notifications. When you are using the OMA to setup the member records, you can specify the interviewer to be either the manager, the participant, or some specific person.

Second, we have changed the questionnaire generator to limit the number of questionnaires that it will send to a single person during one cycle. This prevents the administrator or manager by default from getting 300 e-mails all on the same day! The throttle on this function is set in the Administration form.

Third, you can now manually select the skills for any participant by editing the participant profile capabilities section. If you do this, click the "Do Not Interview" option. If you are always going to do this manually (rather than by questionnaire) then you should set "Do Not Interview" as a default option for participants in the OMA setting in the Origin Document.

Fourth, the system now understands the "Reassignment Required" property to mean that such assignments do not need to have skills selected, and that that such "Members" do not need to be interviewed. It also is interpreted to mean that the capacity of a member with "Reassign Required" will never be used when computing the capacity of the group. The OMA detects such participants and sets the appropriate flags.

Reminder Enhancements

The reminder facility has been changed to support a new option, "Do Not Remind" for projects. This will protect the project from the weekly status evaluation. Hence, neither the project manager nor the program manager will be notified about problems in the project.

The weekly reminder analysis is extended to include the authorization of resources (or the lack thereof). If a project plan has unauthorized resources, this information will be included in the weekly notice to the project and program managers. The reminder agent will also update the project profile with the latest authorization data if necessary.

Briefing Enhancements

The briefing system contains a number of changes to support photographs and resource authorization.

Briefing Title Page

A photograph associated with the subject of the briefing will be incorporated into the briefing's Title page if one exists. The library photograph document should be marked with the "use for briefing" option. When a .jpeg or .gif image is provided, it will be scaled. Other media should be sized for a 240 by 320 window. You can, for example, have a short movie with sound recorded as a library photograph document. This movie will be played when the briefing is initiated.

Authorization.

The project briefing process checks for the unauthorized use of resources. In the Exec Summary briefing, this will generate a bullet point. In the full briefing, this will generate an Authorization page which will provide links to the problem commitments showing requested vs. authorized labor graphs. The system does not try to estimate the impact of these limitations.

Resource Pages

The Resource display page in a full briefing will display the photograph associated with the member. Naturally the search results generated from that page will contain both photos and resumes where available.

Enhanced Dashboard Navigation

Web users will notice new dashboard links on the project, program, project commitment, member and organization reports. These links will allow you to go directly to one of the dashboard views opened to the place where the current report appears.

For example, if you open a project report and click on the "PROJECT CMT DASHBOARD" link, the Commitments by Project Dashboard view will be opened to beginning of the commitments for the current project.

If, on the other hand, you were to click the "DASHBOARD" link from the same project, the system would open the Programs with Project Dashboard to the parent program for that project and all the member project of that program. The same result would be obtained by clicking the "DASHBOARD" link from the associated program document.

Opening a Member document will provide options to view either the "ORGANIZATION DASHBOARD" or the "COMMITMENT DASHBOARD". The first will open to show the parent organization and its members. The second opens to show the current member and its commitments (if any).

Using these links avoids the need to page through views in order to find a particular subject. By starting from a "Favorite" on the locator page, you can see a dashboard perspective in two clicks.

Note that these special links activate agents. Hence there may be a pause as the agent is executed. This delay will vary depending upon system activity and database size.