

Installing Observatory Reporter

Overview

Observatory Reporter(tm) is a Web enabled Notes application. It can be used by a single project leader or by a group of project leaders to create reports for any number of projects. This is a easy application to install and manage. Instructions for using this database are found in the System Guide for Project Leaders.

You may install several of these databases, one for each project leader or manager, or you may have one that is shared. The important point is that each must have its own unique source identification title defined in the Administration document. You will probably want to assign these titles.

Installation

Review the *ReadObs* file in the \OBS directory on the distribution CD!

1. Choose where the database is to be located.

If the database will be a personal one, it can be located on the Project Leader's system as a local Notes client database. If it will be shared, it must be placed on a Notes server.

Note: These instruction pertain to the use of this application as a server based application supporting both Notes and Web clients installed on the same server as the Observatory database.

2. On the distribution CD, find the \OBS\OBSRPTR directory.

In this directory you will find a Notes template file OBSRT200.NTF. (The number may change from release to release.)

3. Copy this template to your local \Notes\Data directory. The Template name is "ObsReporter Template200" (The number may change from release to release,)

4. Using Windows Explorer, change the file attributes on this file from Read Only to Read Write. (Select file, Since the file is stored on a CD, it is read only. But in order to modify the template, now or in the future, you must have Read/Write access. Select the file. Select the command "File Properties" from the Explorer menu, and uncheck the Read-only checkbox.

Sign the Observatory Reporter template using an ID trusted in your domain with all execution access privileges. (If you are only creating one database, you can sign the database instead.)

5. Use the command File, Database, New to create a new Notes database (either locally or on the server as discussed above) using this template. Name the database so that it can be easily recognized by its intended users. (e.g., Project Reporting Database)

6. Set the Access Control list of the database to allow the intended Project Leaders to be editors and the system administrator to be manager. Default access should be Reader or No-Access.

Setup the Observatory Reporter Administration Form

From the Menu select the command "Create" and the document "Admin Form" to display a form similar to the following. Enter the proper parameters and save the document.

The screenshot shows a Lotus Notes window titled "Administration Profile Document - Lotus Notes". The main content area displays the "OBSERVATORY REPORTER Administration Form". The form includes the following fields and options:

- Email address for observatory:** ProjectWatch .@ (your Notes administrator or program office should be able to provide you with this information)
- Project Report Source Identifier:** Observatory Test File . (enter a short name or phrase that identifies your team or your site to the observatory staff so that reports can be properly classified, your observatory administrator may provide this)
- Number of hours in a "full time" week:** 40.00 (typically 40)
- Number of hours in a "full time" day:** 8.00 (typically 8)
- Units used to report actual work:** Hours (choose Hours, Days, or FTE for Full Time Equivalent People)
- URL for this database:** http://marinesrv.mairnes.com/PrjRepr.NSF (enter the URL to access this database http://www.yourco.com/./hriidb.nsf)
- URL for observatory database:** http://marinesrv.mairnes.com/PrjWatch.NSF (enter the URL used to open your observatory database http://www.yourco.com/./observatorydb.nsf)
- Assignable Resources:** (enter a list of resources that project managers may assign, these can be people or department names)
- Additional Resources:** Allow Any Name Include Observatory Members
- Automatic Project Report Removal:** Delete Finished Projects after 29 days; Delete Canceled Projects after 0 days; Physically Remove Deleted Reports after 10 days.

Email Address for Observatory

Enter the email address of the Project Observatory mail in database.

Project Report Source Identifier

This is unique name used to identify all the project reported from this particular reporter database. The name may be assigned by the observatory administrator. Otherwise, pick a name that identifies the group sending these reports.

Number of hours in a "full time" week

Usually a standard week of 40 or 37 hours. You might use a smaller number if everyone worked part time hours (student employees)

Number of hours in a "full time" day

Usually a standard workday of 8 hours.

Units used to report actual work

Hours, Days or FTE for full time head count. Pick whatever is most convenient for you. Use hours if your projects are small; other units with big teams make counting easier.

URL for this database:

Enter the full URL used to access this database from a browser. This should include the file name of the database and end in ".NSF" Make sure that there are no spaces in the name. Test this by copying it into the location field of your browser.

URL for the observatory database.

Enter the URL used to open the Observatory from a browser.

Assignable Resources:

When people create plans, they identify resources used to implement them. This section lists those resources that you want to allow to be used in projects. All the resources you list here will be in a drop list for selection. Enter resource names separated by commas.

Additional Resources

Allow Any Name. If you check this option, then the project leader may enter any name for a resource.

Include Observatory Members. If this is checked then the list of possible resources will include all of the Organization members defined in the Observatory Database listed below.

Note: If you don't list any specific resources, you should check "Allow Any Name" or the project leaders will be unable to plan any projects.

Automatic Project Report Removal:

Delete Finished Projects after [x] days.

Delete Canceled Projects after [x] days

Physically Remove Deleted Reports after [x] days

Enter your choices or accept the defaults. (28,1,10) . These setting are used to housekeep the database.

The following settings are only required if you choose the option "Include Observatory Members" above.

Observatory Server Name: Enter the full name of the Domino Server holding the Observatory whose members are to be listed.

Observatory File Name: Enter the file name as shown on the database properties dialog box for the observatory database.

Activating the Agents

This database contains a single scheduled agent named "SendReports" and several others used on web forms. Schedule the SendReports agent to run Daily or more often.

Customization

The application contains a "CustomXMLField" form that enables the transfer of additional project data to the observatory. The use of these forms is discussed in the Customization chapter of this guide.

Operation

Instructions for the operation of Observatory Reporter are found in System Guide 3.