

Installing the Request / Observatory Link

Overview

For sites that use the Work Request Application component of the Project Gateway Repository Suite, Project Observatory provides an automated reporting link.

The purpose of this is to allow the estimated work that is expected to be applied to work requests which have not yet been scheduled as projects to be seen as "proposed" work in the Observatory.

When this link is installed, the Request database will appear as a Project Report in the Observatory which will be of the approval type "Proposed."

Not all requests will be included in this report.

Only the following kinds of requests are included in the transmitted work.

Waiting For Scheduling, Waiting For Approval of Estimate, Deferred, Scheduled

Only those requested that have a non-zero estimated effort associated with them are used. Requests which are already committed will not be reported because they are already included in the work being reported by the associated Repository.

For each request the work is spread over a time range. The end date of that time range is assumed to be the estimated finish date, if an estimate has been provided. or the Required by date, if it has been provided.

If the effective end date is less than 7 days in the future, then it is moved to at least 7 days into the future.

The estimated work is used to calculate a minimum likely duration. Then an estimated start date is computed using the estimated end date and the expected duration. If this is in the future, then it will be used, else, the planned start is assumed to be next week and the planned finish is retained. The system allows the estimated duration to be squeezed up to a point, then it starts pushing the projected end date to create a more realistic workload scenario.

The effect of all this calculation is to create a bubble of proposed work that will move forward in time automatically. As requests are committed, they will be removed from this work bubble. As new requests are added and estimated, they will be added to it.

In the Observatory there is simply a project whose project name will be the title of the Work Request Center database.

Note: You can have any number of work request databases connecting to a single repository. Each will appear as a separate project in the Observatory.

Project Commitments Reports:

In order to provide some additional information for Observatory users, the commitments of the requested work are divided according to the name of the requester. So there will be one Project Commitment document for each person who makes a request.

Special Actions:

The agent creates text for the status report area that lists the number of requests included and how many have adjusted data.

The agent reports each individual request as a milestone of the Request project. This allows requests to be seen in a timeline using the milestone report viewer, and to be used, if desired, in Interproject dependencies.

Installation

The following assumes you have a Work Request Center application database using the 5.04 release design.

Your task is to install one agent and one view into the existing design and schedule the agent to run nightly.

Installation Process

The RQOL software is found on the Project Observatory distribution CD in the \OBS\RQOL directory. The contents of this directory consist of a Notes database file named "RQOLV200.NSF."

This database will never contain any user data, it is provided only as a container from which you can extract new design elements and add them to your existing Project Gateway repository databases.

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

Using Explorer, copy this database into the \Notes\Data directory of your desktop Notes client (not the server).

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.

Using Notes, use the File Database Open command to open the RQOL database (titled "Request Observatory Link") on your desktop. Close it so that only the icon is displayed.

Signing the RQOL database.

You should sign the RQOL database before you copy its components to the Request Center database with the same ID that you used to sign the Request Center database agents. This is probably the same one used for the Repository database.

Login using the ID used to sign the Request Center. This ID should have the right to run restricted agents and the [PGMASTER] and [PGADMIN] roles.

Use the command Tools, Server Administration. Select the server and press the "Database Tools" button. Select the "Request Observatory Link", and select "Sign A Database" with the option "Sign Every Design Note" and Press the SIGN button (not the DONE button.) This process will only take a few seconds.

Inserting the new design elements

1. Start with icons for both databases on your desktop. Make sure that someone has not already installed these extensions to your work request database.

2. Copy the XML Request Observatory Link agent from the RQOL database into the repository.

Open the RQOL database, Go to Agents, Click on the XML Request Observatory Link agent. Press Edit Copy. File Close.

Open the Work Request database. Go to Agents. Put the cursor anywhere on the agents list. Select Edit Paste. File Close.

3. Copy the 1 view (XMLRequests) and from the RQOL database into the repository view list.

Open the RQOL Database. Go to Design. Select Views. Select the view. Then the command Edit Copy. File Close.

Open the Work Request database. Go to Design. Select Views. Select the menu command Edit Paste. Close.

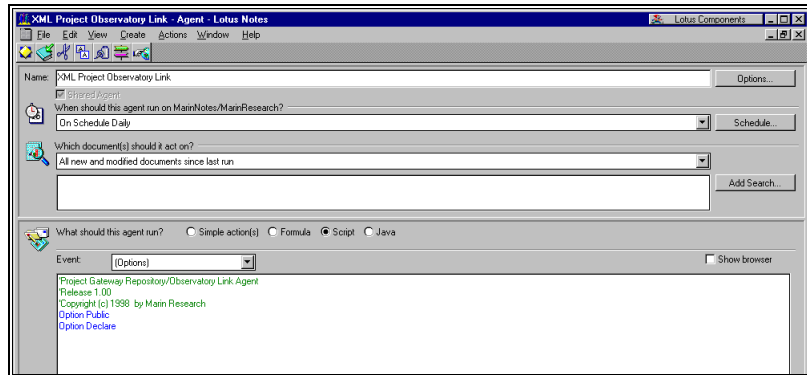
Configuring the Agent

Note: If you are upgrading an existing system, get the declarations setting from the existing agent and copy them into the new agent.

1. Find the new agent "XML Request Observatory Link" in the agent list of the Work Request database. Double Click to open the agent for modification.

2. At top of the form select "Schedule Weekly" (or Schedule Daily if you prefer). Press the "Schedule Button" at the right. On the dialog, at the bottom, select the name of the server on which this agent should execute. This should be the same as that on which the other agents are running. OK the schedule dialog.

3. At the bottom of the form you will see a window containing the words "Option Declare" and a Copyright statement. Immediately above this is a list selection labeled: "Event".



Change the Event from "Options" to "Declarations"

At the top is one lines you must modify.

```
Const observatoryMailAddress=""
```

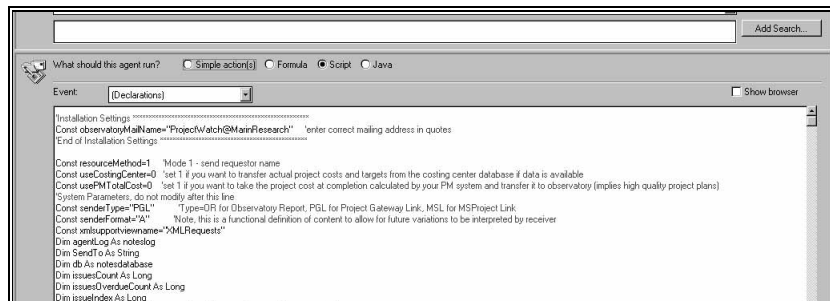
Set to the mail in address of your observatory which you determined when you put it in the name and address book.

e.g. Const

observatoryMailAddress="ProjectWatch@MarinResearch"

Review

When you are done you should have text like the following:



File Close and Save.

Activating the Agent

Set the checkmark next to the agent name (XMLRequest Observatory Link) to enable the agent.

This completes the installation process. Assuming that you have entered the correct mail name, and that there is a mail path from the request database to the observatory, you should be transmitting reports either tonight or this weekend.