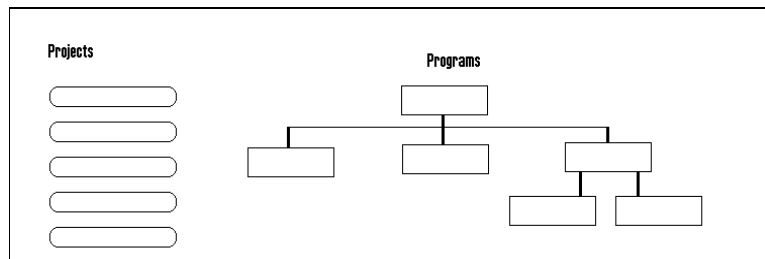


Mapping Project Information into the Observatory Structure

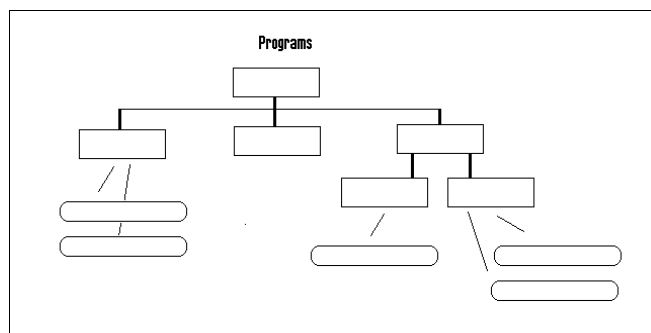
Overview

Each project abstract describes a single project and the commitments of one or more resources or groups of resources. The primary job of the administrator is to instruct the system where to put the incoming information. That is, to which observatory program does each project belong and to which observatory organization does each commitment belong?

This process can be thought of as building a map. You lay down logical paths for information to follow from its origin to its destination.



Projects and Programs before mapping are unrelated lists



Projects and Programs after mapping form one cohesive structure

In small systems the relationships between the details and the structure will be obvious, and all that will be required is to learn the mechanics described in this chapter.

In large scale systems you will need to develop contacts with people throughout the user community to get assistance on determining where items should be located.

The actual mapping process is done using special views called the program assignment worksheet and the organization assignment worksheet.

When the projects originate from one or more Project Gateway Repositories, the Observatory Setup Assistant can automatically create the mapping information.

The Program Assignment Worksheet

The program assignment worksheet view is organized by project origin.

The project origin is the identification of the source of the project report.

If the source is a Project Gateway repository or Request Center, then the origin name is the title of that database.

If the source is an Observatory Reporter database, then the Source Identification name is defined on the Administration profile page of that database.

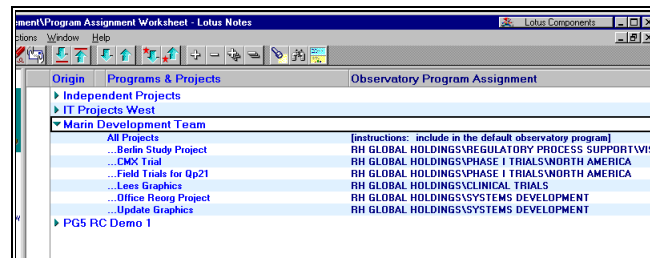
If the source is the Observatory Reporter for Microsoft Project 98 addin, then the origin name will be the name entered in the source identification field of the dialog Setup tab.

All sources should provide an origin name, but if a report comes from a source that does not do so, the origin name "Independent Projects" is used as a default. You may want to tell your Project Leaders the Source Identification titles that they should be using so that you will know exactly what work each represents.

When you look at the program assignment worksheet, you can collapse it to a top level of categories which are origins. There is also a specific view of origin level assignment documents.

Within each origin, the projects will be listed according to the program structure defined at the origin if such a structure exists.

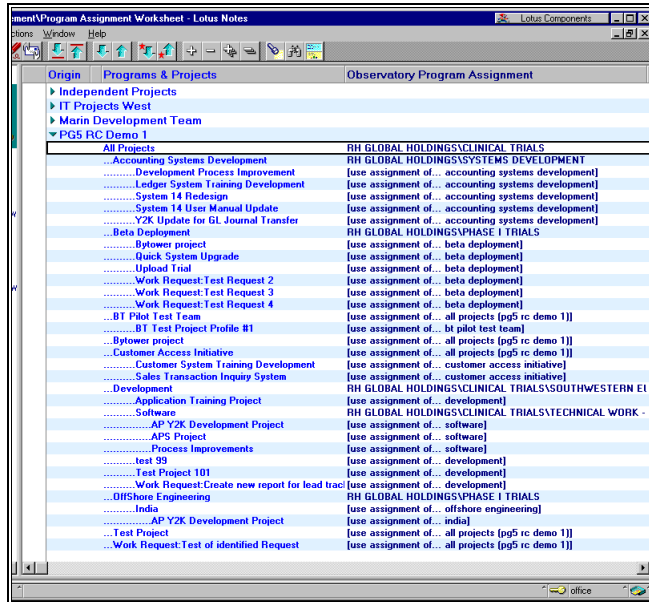
Lets look at two cases.



Note the entry "All Projects" just under the origin name.

Case 1: If the source is an Observatory Reporter database there will not be any programs defined. The assignment table for this source will be a simple list.

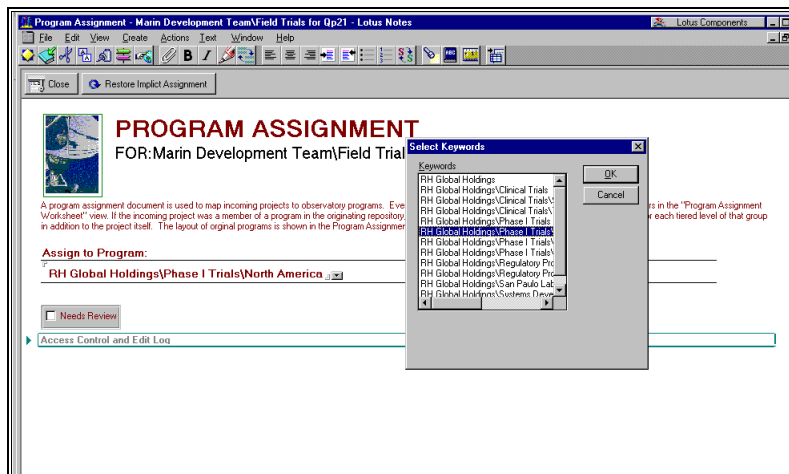
Case 2: If there was a multilevel program structure, then you might see something like the following: Note that, even when programs are provided by the source, the "All Projects" item is still shown.



In every case, each project that has arrived from that origin will be listed.

The job of the administrator is to tell the system where each project should be placed in the observatory organization.

To do this, the administrator opens one of the documents listed and enters the name of the observatory program. These documents are called "Program Assignment Forms."



Assigning a specific project to a program

If the administrator enters a program name into one of the "project level" program assignment forms, then that project will be attached to the specified observatory program.

Assigning all projects from an origin to the same observatory program

If the administrator enters a program name into the "All Projects" program assignment form, then every project from that origin will be assigned to a particular observatory program unless explicitly assigned elsewhere.

Assigning all projects from an origin program to an observatory program

If the administrator enters a program name into one of the items that represents a source program group (i.e. a program in the originating repository) then all projects which are part of the source program will be assigned to the designated observatory program. For instance, if there is a program named "Bills Development Work" in a Project Gateway repository, then there will be an entry in the program assignment worksheet entitled "...Bills Development Work". Assigning an observatory program named "Advanced Products Initiative" to this entry will assign all projects that are part of Bills Development Work in the repository to the Advanced Products Initiative observatory program. As new repository projects are created, they will also be added to the observatory program.

Summary

So, in the simplest case, if you have one project or a hundred projects coming from a particular origin, and you want all of them to be associated with a single observatory program, you only need to make one entry in the assignment worksheet. That one entry is made on the "All projects" row of the worksheet, just under the origin name.

In the most complex case, each project can be assigned to a different observatory program.

The Default Program

Projects that are not explicitly assigned to observatory programs "inherit" from the table entries at the next lower level of indentation. The system starts from the project and works its way upward until it finds the name of an observatory program to use. If it reaches the top of the list for that origin, it assigns the projects to the "default program" whose name was defined on the Observation Administration Form.

Reading the Worksheet

The rightmost column of the assignment view shows either the explicitly assigned program name, or the name of the next higher level item that will be searched. You always look up to find these references, and you never look beyond the origin category demarcation.

Implications of Assignments for New projects

If you assign "All projects" to an observatory program, then any new projects that are sent from the source will automatically be added to that program without any future effort on your part.

If you do not, then any new projects will be placed into the default program.

Bells

The "Bell" icons, which are formally called the "new item indicators" are set when the system creates a new row in the worksheet. They are displayed to help you find those items that need your attention.

Once you have taken action, either by assigning the item or by deciding that the automatic assignment is the appropriate one, you should remove the indicator.

Removing Bells

Open the Program Assignment Form, edit, and clear the "Needs Attention" checkbox, close and save.

- or -

Set the checkmark next to the item in the view, and run the action: "Admin\Clear New Item Indicators" from the Notes client menu.

Finding New Projects Quickly.

The Management Navigator provides two views of the program assignment worksheet. The main view shows everything, the other view, designated by the word "new" next to the bell icon, displays only those entries that have a new item indicator.

Email notification about new projects

The system will send you an email whenever new items have been added to the worksheets if the "Notify about new Items" option is checked in the Administrative Notifications section of the Administration Form.

Currency Setting in Origin Documents

If the system is to support multiple currencies (Administration Form, Currency Section) then logical name of the currency must be selected for each source of projects. This is done in the "Origin" document for each source listed in the Origin Worksheet.

Open the origin document for each source and edit it to select the currency. (The list of currencies shown will be those defined in the Custom Currencies view on the Customization Navigator.) When saved, the selected currency will be shown in the Origin Worksheet view.

Note: The origin document is the same document as the "All Projects" document shown on the Program Assignment Worksheet.

The Organization Assignment Worksheet

The follow discussion assumes that you have read the "program assignment" section.

Again, we begin with the assumption that you have defined an observatory organization as described in the previous chapter.

Each project has one or more "project commitments." A project commitment is a document that defines the usage of a resource within that project. Here we use resource in the most general sense to mean either specific named individuals, teams, departments, or the total set of workers on the project.

The definition of "what is a resource" is left to the origin. Some origins may create project commitments for each person in the project, others may lump all the work together in a single commitment and others may report resource use only at the team or department level.

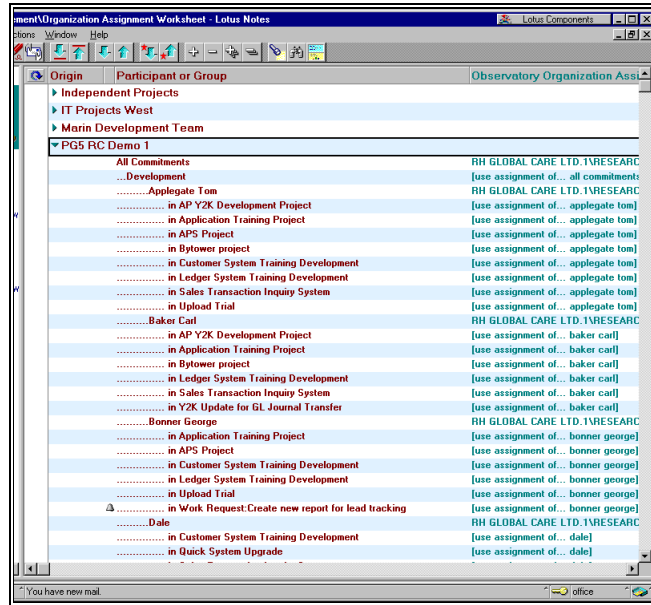
Your task is to associate these commitments with the proper observatory organization or organization member. You will probably have to talk with the project managers (or repository owners) to be able to do this. Depending upon how the observatory organizations relate to the resource definitions in the origins, this task may be very simple or quite time consuming. If the source is a Project Gateway Repository and you want the Observatory to use the same structure as that repository, then the Observatory Setup Assistant can create it for you automatically.

You will probably want to provide some instructions to your project leaders as to the level of resources that they use for reporting. If you will be creating Organization Members, then they must provide you with resource information at that level of detail. However, if you will be creating departments as your lowest level of organization, then there is no value in collecting commitments by individual. In fact, the unnecessary commitments will increase your workload and the system's processing time. So origin and observatory resource reporting should be matched as where possible.

The organization assignment worksheet is divided into categories that are the origin names. This is exactly the same as the program assignment worksheet.

The top entry for each origin is "All Resources." If an assignment is made for this entry then all commitments from this origin will be associated with the specified observatory organization unless otherwise directed.

The next tier(s) of entries represent the "source organization" structure. If the origin is a Project Gateway Repository, then the organizational hierarchy of that repository will be displayed.



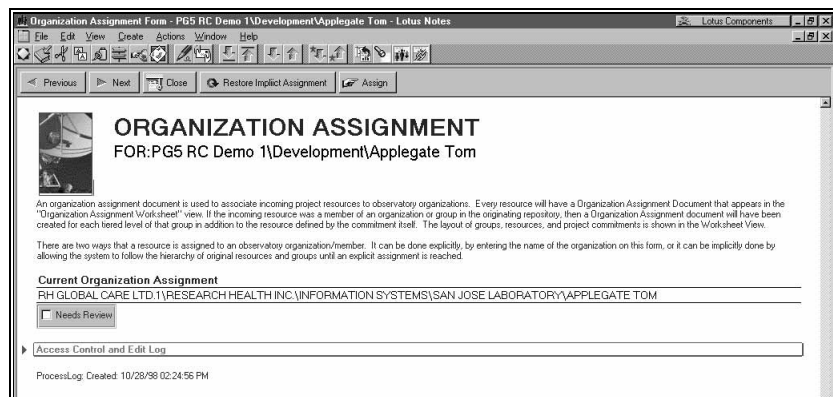
A small part of the Organization Worksheet corresponding to a Project Gateway repository. Notice "All commitments" at the top of the section, then development, and finally an individual resource name "Applegate Tom" Subsequent lines show commitments to several projects.

The next to last tier is the "resource name" provided by the origin. This may be a person's name or may be some department identifier. Even if it is the name of a person, it may be a "project management" name rather than a "directory" name.

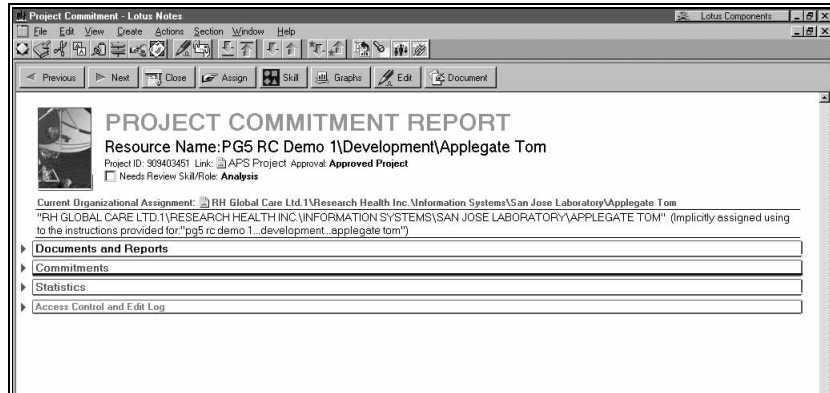
The lowest levels (greatest indentation) will be occupied by the project commitments. These are easily recognized because they begin with "...in" followed by the name of the project.

The Assignment Process

When you open one of the "name" items, you see an "Organization Assignment Form."



When you open one of the "...in.." items, you display the Project Commitment Report form.



In either case, there is an "Assign" button displayed. Press this button to show a list of existing organizations and select the proper one from the list, close and save.

How the Worksheet is Used

When the Maintain Commitments agent runs, it starts from the project commitment and works its way upward until it finds the name of an observatory organization. If it reaches the top of the list, it associates the commitment with the "Default organization" whose name is specified on the Observatory Administration Form.

By assigning at the higher levels of the structure, you not only minimize the number of assignments you need to make, but you provide a logical assignment for the commitments of future projects.

If the incoming commitments are provided at the "person" level, then you can assign them to "Organization Members" by using the person-level item.

For example

if the items appear as

...Engineering

.....Tom

.....in test project 1

.....in test project 2

You would select the line for Tom and make the assignment to the Organization Member "Tom Applegate"

It is quite possible that the same person could appear more than once due to differences in the spelling of their name in project plans. It is also possible that the same person could be found in commitments from different origins. In these cases, each entry should be assigned to the organization member.

So, even if the same person is assigned under several names in several different project sources, all of that person's work can be folded into a single Organization member report.

The same, applies to teams and departments. Note that, even if commitments are reported at the individual level, there is no requirement to create organization members, you can simply assign the whole department to an organization.

Review

The observatory will receive reports from various sources. When new projects or commitments of new resources on existing projects arrive, you will need to assign them to the most appropriate programs and organizations. Once assigned, they will stay assigned forever without any additional effort on your part.

The background agents, Maintain Programs and Maintain Organizations, use these assignments as instructions to update the Program and Organization Reports.

New Items

As projects and commitments arrive, they will be displayed in the Program and Organization Assignments Worksheets. New item indicators (Bells) will appear next to each new item. You can remove the bell symbol by editing the item and unchecking the "new item" indicator.

The new items are displayed in the full worksheets, of course, and also in special "new" worksheets that show only the new items.

If the appropriate box is checked in the Administration document, you will be sent an email whenever new items are created in the worksheets.

Worksheet Organization

The first level of worksheet categorization will always be the name of the origin (source) of the project or commitments. This level will have a "twistie" next to it. You can get to this top level, therefore, by collapsing the view.

The name of these top level items will be the title provided by the originating system, or the Source Identification given by Project Leader. All the reports from each origin are grouped together in the worksheet, even though they may be assigned to quite different programs or organizations.

Immediately under each of these origin categories is an entry labeled "All Projects" or "All commitments." By specifying a Program or Organization for this item, you provide a home for all information coming from that origin, now and in the future. If you do not provide a setting for these items, then the observatory default programs and organizations may be used.

Intermediate levels of headings will be created if the source system provides them. For Project Gateway Repositories, there may be a full program and organization hierarchy predefined.

For other sources, the items may simply be listed under the origin with no other structure.

Groups used in Microsoft Project plans will be sent to the observatory and show up as intermediate levels and allow you to assign all of them to a single Organization in only one step.

Assigning Items

Select any line in the worksheet and edit it to specify a particular program or organization report for members of that item. If you pick a line that is an individual project or project commitment, then only that item will be affected by your entry.

If you pick a higher level item, then all the logical children of that item that are not otherwise assigned, will be affected.

If you are unsure as to how a project or project commitment is being assigned, click to open the worksheet document. A field will be displayed telling you the current assignment and how it is created.

Updating Program and Organization Reports and Dashboards

The contents of the Program Reports, and the visual linkage between them and their assigned projects, is created by the Maintain Programs agent. *The changes that you make in the Program Assignment Worksheet will not have any effect until the Maintain Programs agent has had a chance to run.*

In the same way, the contents of the Organization and Organization Member Reports, and the visual linkage between them and their assigned projects on the dashboard views, is created by the Maintain Commitments Agent. *The changes that you make in the Organization Assignment Worksheet will not have any effect until the Maintain Commitments agent has had a chance to run.*

If your agents run only at night, then you will not see the effect of your assignments until the next morning.

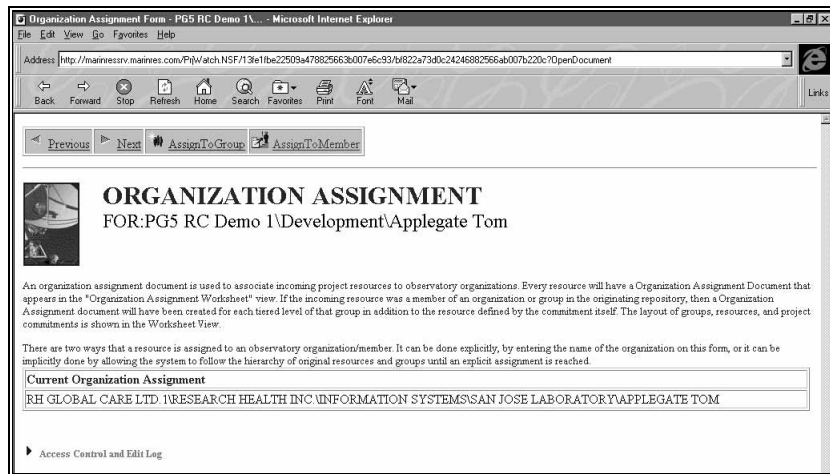
Results

The visible result of the mapping process is seen in the Organization and Program dashboard views and in the numbers and graphs created within those reports.

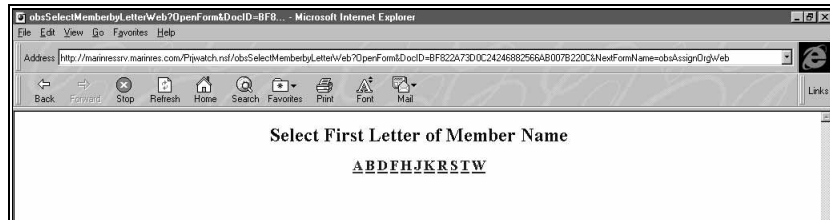
Web Operation

All of the activities described in the previous sections can be done from a web browser.

There are two significant changes when using a browser on the Organization Assignment and Project Commitment forms.



First, the Assign button is replaced with two buttons: AssignToGroup and AssignToMember. If AssignToMember is used, a "Select First Letter of Member Name" page will appear. Clicking on the appropriate letter will return with the Assign To Organization Form with a selection of members whose names begin with the selected letter.



This two step process avoids the need to download very long member lists to the browser.

Second, the Restore Implicit Assignment button is not shown. The option is provided in the Select Action list when either of the Assign functions are used.