

Using Forecasts & Notifications

Forecasting

The forecasting system evaluates observatory data and issues forecasts when situations are detected that may be of concern to managers.

Forecasts are issued by creating documents and sending email notices. The forecast documents are shown in the forecast views on the Observations Navigator. The forecast emails are sent to the appropriate managers when new forecasts are issued and as periodic reminders. Graphs are provided to display the data used to produce the forecast.

Forecasts are updated periodically and automatically removed when the condition has been corrected or no longer meets the logical criteria of the forecast.

Forecasting is done using two methods.

Demand forecasting uses the current workload plan and capacity plan. It applies a simple moving average technique to smooth out project variations. These forecasts alert you to existing problems that may otherwise not be noticed.

Trend forecasting uses the historical data values for time, effort and cost. Using the method of Least Squares, the forecasting agent computes a trend line and projection. This projection is compared with the current target settings. These forecasts identify possible problems, but you need to exercise judgment as to the validity of the assessment.

Disabling Forecasting

On Organization and Member Reports there is an option setting labeled "Do Not Forecast." On the Target Dialog of Project and Program Reports there is the same option setting. Check this option to prevent forecasting for this entity.

All forecasting can be disabled by changing the Administration Form.

Forecast Types

Demand Forecasts

A demand forecast identifies a report where resource demand exceeds capacity during some future period.

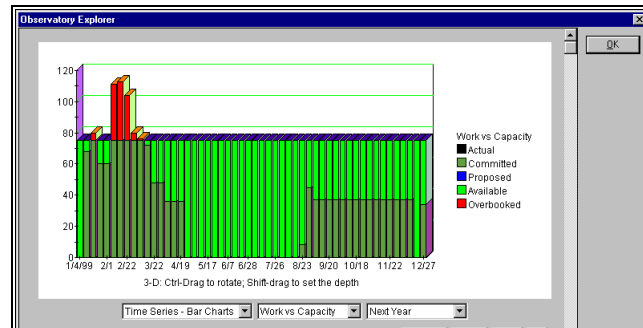
A table shows the planned work and capacity starting at the time period for which the excess demand was identified. Since a moving average is used to identify the problem, not all of the weeks shown may be overcommitted.

Since the analysis is done for a fixed time period, the overrun may actually start prior to the period identified in the forecast.



A demand forecast

By pressing the Graphs button, the Observatory Explorer will display the data in bar chart form.



An Observatory Explorer Graph of the forecast data

Cost Forecasts

A Cost forecast identifies a report in which the Total Cost has increased over time at such a rate that it appears likely that the target cost will be surpassed in the near future. These forecasts are not issued if the target is already exceeded.

Effort Forecasts

An Effort forecast identifies a report in which the Total Work has increased over time at such a rate that it appears likely that the target effort will be surpassed in the near future. These forecasts are not issued if the target is already exceeded.

Opening Observatory Explorer shows the historical data collected in the original report and a fitted trend line. The forecast text shows the date at which the current target would be exceeded if the trend continues and a projected value at a future date.

FORECAST
For: Update Graphics
Issued: 12/08/98 11:49:00 AM Link Update Graphics

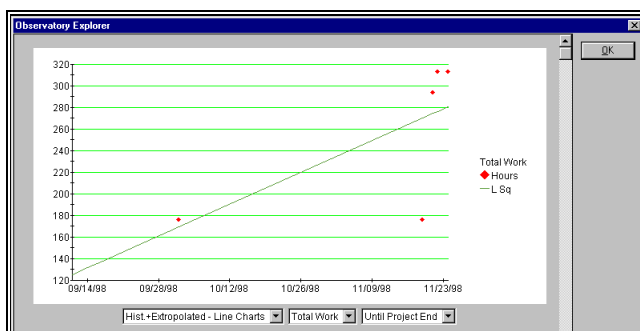
Forecast - Trend Indicates that Target Effort may be exceeded in 90 days

A review of the Total Work history over the past 53 days shows an upward trend.
If this trend continues, the total work, currently **313** hours,
will surpass the management target of **500** hours on **03/08/99 05:35:05 PM**.
In 6 months, the Total Work is projected to be **693**.

Observatory forecasts should be interpreted as indicators of potential problems, not as definite statements about the existence of such problems.

Notified: Dale Smith on 12/08/98 11:26:50 AM

Access Control and Edit Log



The trend of Total Effort over time is shown by the Graphs button

Time Forecasts

A Time forecast identifies a report in which the finish date has slipped over time at such a rate that it appears likely that the target finish date will be surpassed in the near future. These forecasts are not issued if the target is already exceeded.

FORECAST
For: Ledger System Training Development
Issued: 12/08/98 11:48:50 AM Link Ledger System Training Development

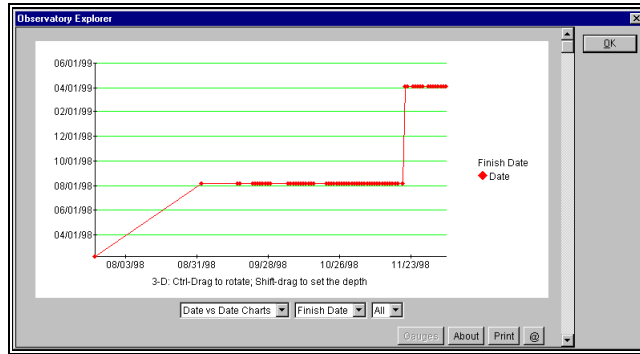
Forecast - Trend Indicates that Target Finish Date may be exceeded in 75 days

A review of the history of the Finish Date over the past 138 days shows that it has been slipping.
If this trend continues, the Finish Date, currently shown as **04/05/99**,
will surpass the management target of **06/29/99** on **02/21/99**.
In 6 months, the Finish Date is projected to be **03/09/2000**.

Observatory forecasts should be interpreted as indicators of potential problems, not as definite statements about the existence of such problems.

Notified: CN+Tom Applegate/D+MarinResearch;CN+Gay M. Cole/D+MarinResearch on 12/08/98 11:26:45 AM

Access Control and Edit Log



The date by date chart for a time forecast. The vertical scale shows the project finish date. The horizontal axis is the time when the finish date was reported.

The Forecast Views

There are two forecast views on the Observations Navigator.

The **Forecasts by Manager** view lists all forecasts categorized by the manager name found in the email address of the associated report. Within each category, reports are listed based upon the date of the predicted event.

The **Forecasts by Subject** view groups forecasts into Programs, Projects, and Organization categories. Within each category, reports are listed based upon the date of the predicted event.

| Manager | Problem | Occurs On | Concerning |
|--------------------------------|---------|------------|--|
| ▼ Gary M. Cole | | | |
| | Demand | 10/16/2000 | RH Global Care Ltd.\Research Health Inc.\Information Systems |
| | Demand | 10/16/2000 | Unassigned Projects |
| | Time | 12/16/2000 | Upload Trial |
| ▼ Laura Jones | | | |
| | Time | 09/20/2000 | Customer System Training Development |
| | Cost | 02/21/2001 | Field Trials for Qp21 |
| ▼ Tom Applegate | | | |
| | Time | 09/25/2000 | Ledger System Training Development |
| ▼ (No Manager Assigned) | | | |
| | Time | 05/21/2000 | RH Global Holdings\Phase I Trials\North and South America |
| | Time | 12/03/2000 | PG5WReqB2 demo |
| | Effort | 01/22/2001 | RH Global Holdings\Phase I Trials\North and South America |

Forecasts by Manager View shows all current forecasts

Email Notifications and Reports

The observatory sends email for a variety of reasons. These are generally controlled by policy settings on the Administration Form, or option settings on individual reports or both.

Email messages can be sent to any mail client, even mobile ones such as Palm accounts. No formatting or embedded HTML is used, but these messages do usually include URLs that will be rendered as underlined links by many mail clients. Sometimes the URLs are broken by line length limits within the various email systems and you may have to cut and paste to reassemble them.

If you have a Notes mail client, the messages will include a doclink icon that can be used instead of the URL to open the document in the Notes client.

Note: Most Observatory forms use the words "Email Address of Manager" You should enter your normal user name. Whenever email is sent, your user name will be translated into the email address by the Domino address book entry. The only reason to use a full internet email address would be if you wanted to send to a mailbox other than the one configured in the address book.

Administrative Agent Complete Notifications

Automatic upon Agent completion if requested. Controlled by checkbox settings in Administrative Notification section of Administration Form.

These messages are generated when selected agents complete a run. Each will report the run time and generally provide a summary of actions taken by that agent or problems encountered.

Administrator Report Escalation Message

Automatic. Sent to Administrator according to settings in the Reminders section of the Administration form.

Sent to tell administrator that no reports have been received from a particular origin for an extended period of time. Signals communications problem. Rare.

Weekly Project Manager Reminders

Automatic. Controlled by the Reminders section of the Administration form. This will be done on a specific day of the week to remind everyone to get reports sent or repository data updated.

Contains a list of all projects owned by that manager. As a convenience, for each project that is coming from an Observatory Reporter database, it will include a URL to that project report.

Weekly Project Manager Exception Reports

Automatic. Controlled by the Reminders section of the Administration form. Done on a specific day of the week. Messages are sent only if necessary. Sent to the email address found on the Project Report

document. If one project manager has several projects, all projects will be consolidated into a single weekly email.

This is a report in email format about projects within a program that need attention. For each project included, the system writes one or more reasons.

- No report received for a time longer than the threshold set in the Administration form.
- Overdue work in the project, project requires rescheduling.
- Current work is scheduled but no actuals have been reported, status may be incorrect.
- Overdue milestones
- Upcoming that should be completed in the current or next week.

For each project, there is a URL included to create a briefing on that project.

Weekly Program Manager Escalation Report

Automatic. Controlled by the Reminders section of the Administration form. Sent only if necessary. Sent to the email address found on the Program Report document.

This is a report in email format about projects within a program that need attention. For each project included, the system writes one or more reasons. All projects for a single program will be reported together.

- No report received for a time longer than the program level late report threshold set in the Administration form.
- Overdue work in the project, project requires rescheduling.
- Work planned but not reported, status may be incorrect.
- Overdue milestones in the project.

For each project, there is a URL included to create a briefing on that project.

Dashboard Notifications

Automatic. Can be disabled on individual entities by checkbox setting. Sent to manager of subject report.

Announces that one of the dashboard indicators has transitioned to a Red state (second level overrun). These alerts can occur only when the data changes. Changing targets will not trigger them.

Dashboard indicators (Time, Effort, Cost, Progress, Issues on Projects and Programs, Supply/Demand on Organizations and Members) are comparisons between reported data and targets. Targets for projects and programs may be imported or set manually. Targets for Organizations are set by setting the capacity table for that entity.

Capabilities Interview Notifications

Automatic. Controlled by policy set in Skills section of the Administration Form settings. Will not occur unless some custom skills have been defined in the database. Sent to manager email name of organization or member. Optional reminder sent if questionnaire is not completed. Reminder delay is set in the same part of the Administration form. These interviews are repeated on a periodic cycle

Announces that a questionnaire has been created and that the manager should complete it. Includes a link to the questionnaire. Questionnaire asks for inventory of personal skills and capabilities and geographic location.

Project Interview Notifications (original and reminder)

Automatic. Controlled by policy set in Skills section of the Administration Form settings. Will not occur unless some custom skills have been defined in the database. Sent to manager email name of organization or member. Reminder sent if questionnaire is not completed. Reminder delay cycle is set in the same part of the Administration form. Sent when new resources are added to an existing project or when a new project appears.

Announces that a questionnaire has been created and that the manager should complete it. Includes a link to the questionnaire. Questionnaire requests skill codes for each resource and location code for the project.

Questionnaire Assignment Notification (original and reminders)

Automatic. Controlled by the Skills section of the Administration Form. Sent to the Metrics Manager only. Reminders sent automatically.

Announces that the questionnaire is waiting for completion. Contains a link to the questionnaire. Questionnaire asks metrics manager to select most appropriate metrics parameter list for each completed project.

Project Experience Questionnaire Notification (original and reminders)

Automatic. Controlled by the Skills section of the Administration Form. Sent to the person named by the Metrics Manager on the Questionnaire Assignment form which will in turn default to the project manager named in the heading of the Project Report document. Reminders sent automatically.

Announces that the questionnaire is waiting for completion. Contains a link to the questionnaire. Questionnaire asks project manager to provide specific answers to parameters selected by metrics manager.

Forecast Notifications (original and reminder)

Automatic. Can be disabled for individual entities by checkbox setting. Sent to name of manager of subject of the forecast. Additional reminders sent periodically while the condition persists. Reminder delay cycle set in the Forecasts section of the Administration form.

Announces that a forecast has been created and provides link to forecast document. Forecasts identify undesirable trends in schedule, effort, cost, or supply/demand.

Animation Premiere Notifications

One time Notice. Sent if name is provided in New Animation form.

This email tells that the animation is now available for viewing.

Library Overdue Notifications (original and reminder)

Automatic for some Library document formats. Sent to creator and associated report owner (if any.)

This email tells that the due date within the document has been exceeded. It contains a link to the overdue library document. Reminders will be sent until the due date is changed or the status of the document is changed according to reminder rule in Administration form.

Library Response Notification

Automatic if requested by checkbox option on Library Document. Sent to creator of Library Document.

This email tells the creator of a library document that a Response document has been recorded. It contains a link to the original document and the summary text of the response.

Interproject Dependency Notifications

Automatic if requested. Sent to Person named on Interproject Dependency Form, Sent Once or Weekly as requested.

This email tells the user that the relationship specified in the IPD document is no longer valid. One or the other of the projects has been rescheduled. It contains a link to the IPD document.

New Reservation for Approval Notification

Automatic, No User Control. One Time Only.

This email tells the manager of an organization that a new reservation is waiting for approval. It contains a link to the pending reservation.

Reservation Expired Notifications

Automatic. No User Control.

These emails are sent to the original reservation requester at the start of a week when all of the work hours of the reservation have evaporated.