Organizations

Organizations

The organization hierarchy defines the logical ownership of resources and provides a reporting structure for schedule and workload information.

Since you already have some kind of natural company structure, it may be convenient to use this as the basis for your organization tree. In order to make the database more readable, it is important to limit the number of levels of the hierarchy to no more than 3 or 4. This is probably fewer than the levels of your company organization chart, so some compromise may be necessary.

If everyone using the Repository is part of a top level group (e.g. Information Systems) then the top level group should not be defined since totals for the database will be generated anyway.

Once you have defined your organization structure, you should assign all of your participants to the organization unit to which each belongs.

When a participant has an organization category, all the views that are sorted by participant will be further subdivided by Organization. This means that views such as Assignments by Person will be categorized by Organization first and participant name second. Views such as Participant Workload Forecast will tabulate workload against the Organization levels and sub-tabulate it by person within the organization.

Creating a New Organization Profile

Creating a new Organization

To create a new "Top Level" organization:

Select "[New]" in the first field

Enter the organization name in the second field.

e.g. Select [New] and enter "Western Region" to create a first level organization named "Western Region"

To create a new "Suborganization":

Select "[subprogram of ... organization name] in the first field

Enter the name of the suborganization into the second field.

e.g.

Select [suborganization of Western Region] and enter "Marketing" to create a suborganization whose full name is Western Region\Marketing.

User ID for Manager:

Enter the name of the person responsible for the ownership of this organization profile document.

Description

Explain the organization so that others may understand its purpose and mission.

Special Case: Attaching organization profiles to existing organization codes (imported participants)

Project Gateway has the option to allow participant profiles to be created automatically for project plan resources when those projects are imported into the repository for the first time. Part of this process allows the *group name* associated with the participant to be recorded into the new participant profile as the Organization name of that participant.

Because of this, it is possible to have Organization names in use in your repository that do not have Organization Profile documents.

As soon as possible, you should create Organization profiles for any organization names that are already in use. We have made this very easy to do. When you create a new organization, you have to select an entry from the list provided. This list will have three parts. The first part will be a collection of the names of any organizations that are assigned to participants but not represented by Organization profiles.

After this will come the word [New]. After that will come the [subgroup of....] items that allow you to built subgroups from your existing organizations.

So, simply create an Organization document for each item in the first part of the list. As you create each document, the remaining list will be reduced until it is empty. At that point, all organizations will have profile documents and the droplist will begin with [New].

The Organization Profile - General Information

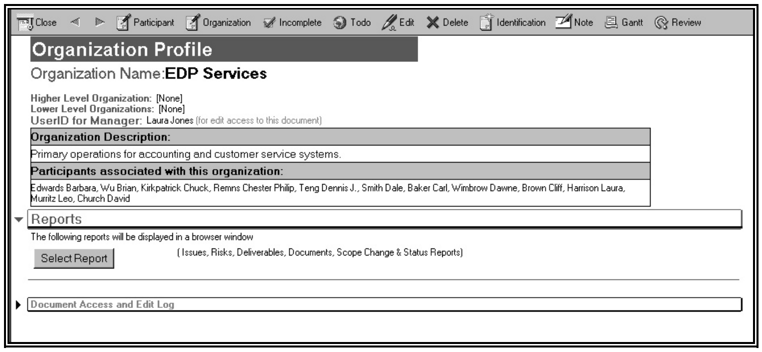
Organization Name

The name consists of one or more words or phrases separated by backslashes for each level.

The name can be changed using the Identification action which is available to the repository administrator and explained later in this chapter.

Higher Level Organization

This field lists the parent organization and links to it when opened in a browser.



A first level organization as seen in a Notes client.

Lower Level Organizations

This field lists the sub or child organizations directly associated with this parent organization. Each name will be linked to the organization document when opened in a browser.

User ID for Manager

This ID will be used to secure access to the organization profile document. The first name in the list will be used as the manager of the Project Observatory Organization Report.

Organization Description

Participants associated with this organization

This table will list the first 100 participants assigned to this organization. These names will be linked to the participant profiles when opened in a browser.

The Organization Profile - Reports

Current Work Plan by Week

This generates a table with one row for each participant and one column for each of 13 weeks. In the table cells are reported the actual, planned or proposed hours for that project week. Work associated with projects that are not approved will be shown in (.)'s.

Red dots appear wherever the workload exceeds 40 hours per week.

Below the table is a participant selector and a button that will get details for a selected participant.

Note: For organizations with many participants or whose participants are involved in large projects, this table can take a long time to calculate. In some cases this may not be possible to complete within the wait time of the browser or the allowed run time for server agents.

Current Work Plan by Day

This is similar to the previous except that hours are calculated for each day. An option at the bottom of the report expands the report to show a full 30 days.

Resource Loading Report

This will open a web page in a new window which a table will be created for each resource in the organization. This table will show, by week, the work planned for that resource on each project. For resources committed to many projects, the individual tables can be scrolled.

This allows you to see the work plan information at the individual project level for each of your participants.

Incomplete Checklists Report

This will provide a list of all incomplete checklist items on assignments for each participant. An item becomes incomplete if it is not checked as finished on a task that is marked as done.

This report is organized as a table. Each task with any incomplete items will be listed and linked to the assignment. The participant, finish date, and list of incomplete checklist items will appear to the right. If checklist issues were generated for these items, then links will be provided to the issue documents.

Participant Status Reports

This report displays the list of status reports filed by participants in this organization.

The user may select Basic, Standard, or Full presentation of the reports. In the Basic mode, only one line per report is created. In the Standard mode, a second row appears under the title field showing the "body" of the report. In the Full mode, three additional rows appear showing the "Achieved", "Next Week", and "Problems" sections of the report.

The user may now control the selection of reports to be included. The options are "LATEST", 2, 4, 13, and ALL REPORTS. The LATEST option will show only the most recent report. The 2, 4, 13 will limit the results to show that many reports (if available).

Participant Issues Report

This will create a report listing all Issues that were created by or assigned to the UserID's associated with the participants in this organization

Participant Risks Report

This will create a report listing all Issues that were created by or assigned to the UserID's associated with the participants in this organization

Scope Changes Authored by Members

This will create a report listing all Scope Changes that were created the UserID's associated with the participants in this organization

Scope Changes Investigated by Members

This will create a report listing all Scope Changes that are assigned to the UserID's associated with the participants in this organization

Custom Todo Report

This will display an selection page to allow you to choose what kinds of information are to be included in a todo participant calendar report. The choices are "Issues and Risks", "Project Milestones", "Project Tasks", "Checklist Items", "Scope Changes", "Project Schedule Info", "Project Documents", "Participant Holidays" and "Group Schedule Info".

Note that Project Milestones, Tasks, Checklist Items, Project Schedule Info, and Participant Holidays are actually associated with the participant. Issues, Risks, Scope Changes, and Project Documents are associated with the participants UserID. Group Schedule Info comes from this organization.

The more items you include, the longer the time it will take to generate the calendar.

Note that, once created, you can save the calendar as a custom report in the charts area.

iCalendar Subscription

This creates a customized subscription URL that can be recorded in an external application that supports the iCalendar protocol such as Apple's iCal. See the chapter entitled "Using Subscriptions" for more information.

Assignments View

This will open the Assignments by Person, All By Date view to the row that starts with the organization. Note that the organization name will not appear.

Workload View

Clicking this link will open the organization workload view for the current time period to show the rows associated with this organization. The top row will be the monthly projection of remaining work for the organization as a whole. This projection prorates assignments that cross month boundaries without regard for weekends. It estimates finish dates for in progress tasks whose planned finish dates are non meaningful. Hence, you should view this information as an useful approximation rather than absolute statement of fact about future monthly workload hours.

You can drill down this view to the participants, programs, and projects.

User ID Based Reports

Issues Report

This creates a tabular report listing all issues associated with this user. Once displayed, there are many customization options available. These are discussed in the "Using Web Reports" chapter.

Risks Report

This creates a tabular report listing all issues associated with this user. Once displayed, there are many customization options available. These are discussed in the "Using Web Reports" chapter.

Scope Changes Authored Report

This creates a tabular report listing all scope changes created by this user. Once displayed, there are many customization options available. These are discussed in the "Using Web Reports" chapter.

Scope Changes Investigated Report

This creates a tabular report listing all scope changes assigned for investigation to this user. Once displayed, there are many customization options available. These are discussed in the "Using Web Reports" chapter.

Documents Authored Report

This creates a tabular report listing all project documents that have been created by this user. The default layout shows title, project, author, the classification code, status, age, and tracking code. The columns may be customized.

Deliverables Owned Report

This creates a tabular report listing all deliverables whose "owner" field contains the UserID associated with this organization.

The Organization Profile - Charts

Standard Gantt Charts

All organizations can have custom Gantt charts created and maintained by the system agents. See the chapter Using Graphics for details.

The Add Chart link will open a form that will allow you to select any of the standard Gantt charts. Selected charts will be listed at the top of this section. The selected charts do not have to be about the current organization.

Specialty Gantt Charts

A variety of specialty Gantt charts are available at the participant level which are created on request in PDF format.

Note that the row numbers at the left of these charts are hyperlinked to the related documents.

Notes client:

Use the Gantt Action and select from the dialog provided.

Web browser:

Use the links found in the "Charts" section of the profile document.

Please note that, depending upon many factors, the time required to produce these charts may be significant. In some cases, web browsers may time out while waiting or you may encounter as server time-out. In these cases you may need to use the Notes client to get the chart or run the same chart request at the project level.

Issues Gantt

This creates a unique Gantt chart in which each row is an issue, grouped into outline levels by project. The issues are those authored or assigned to the UserID associated with this organization's participants. The dates show the span from the date the issue was originated to the date it was closed, or to the due date if the issue remains open. The color of the bar also show the status, red if open, blue if closed.

Note that, any issue showing red that is to the left of the dashed red "today" line is overdue.

Risks Gantt

This is similar to the Issues Gantt except that only Risks are shown.

Scope Change Gantt

This is similar to the Issues Gantt except that Scope Changes are shown.

Documents Gantt

Again, similar to issues, the lifetime of each document is shown as a Gantt Bar. Approved documents are shown as blue, unapproved as red.

Deliverables Gantt

Again, similar to issues, but note that shows only deliverables owned by the UserID of the organization's participants.

Milestones Gantt

Milestone Reference Gantt

This shows the current dates and, in the second instance, the reference dates of all key events, grouped by project, that are assigned to the organization's participants.

Assignments Gantt

This chart may not be available for large organizations because of its size or the time required for its preparation. There is a maximum size of about 30 pages in any case.

This will show all assignment for the organization's participants grouped by project. Essentially you get, in one chart, all the commitments of your organization.

Dependency links within the individual projects are shown. Links will either connect directly if on the same page or will show the row number of the connected even if on different pages.

Project Assignments Gantt

Selecting this option will prompt you to select a project. Once done, the system will generate a Gantt Chart showing the assignments for this organization's participants on that project.

Web Links

The right side of the charts section provides a place for user created URLs.

The Add Web Link action allows you to add and remove the contents.

When "Save as Custom Report" is used with selected web reports, the link will appear in this section.

Actions Available on Organization Profiles

(left icon) Previous

(right icon) Next

(finger string icon) Add to Locator (Web only)

This will add the participant to your favorites list.

Participant

Organization

These actions create new documents.

Incomplete (Notes Only)

This will generate an Incomplete Checklists report for all the members of the organization. The same report is shown in the reports section for web users.

Todo

This will generate the organization calendar. When used from Notes, and options panel is displayed allowing you to customize the information to be gathered. When used from a browser all information is gathered by default, but there is also a Custom Todo Report link shown in the Reports section that will allow a choice of data items.

The Organization Calendar is generated by amalgamating the information that would be displayed on the calendar of all of the underlying participants. This can take quite a long time to construct if there are many participants or if participants in the organization or if the participants are involved in many projects. By using the options settings, you may be able to both decrease the time required and make a more readable calendar.

Delete

This action, which is restricted to people with the PGADMIN role, can be used to remove an unused organization.

Schedule(Edit Mode in Notes Client)

This will record events for the program which will show up on the calendars of this and higher level Organizations

Identification

This allows you to change the name of the organization. Since the name defines the hierarchy, this is the basic tool for reorganizing the structure of your repository.

You must have the PGADMIN role to see this action.

The Change Name dialog that will appear allows you to change the parent of this organization, to change the given name of this organization, to make this organization a "first level" entity, or to merge the organization into the parent. In the latter case, the organization profile will be removed at the completion of the renaming process. All of the direct suborganizations of the existing organization will become direct suborganizations of the selected parent organization, essentially removing a level from the hierarchy.

When you change the name of an organization that has lower level organizations, the names of all of the suborganizations will be changed during the rename process.

A final confirmation is requested before the change is implemented.

Note that, only the organizations and participants are changed as a result of this action. The system Update Organizations agent will update the participant assignments to reflect the change. This will normally take place overnight. Until that is completed, assignment views will continue to show the previous organization naming.

When the name of an organization changes, the Project Observatory Management Assistant will automatically make an equivalent change in the connected Observatory. During the interim period, the Observatory reports linked from the profile may not be accessible.

Note

This will allow you to send a quick note to the manager, or yourself or your journal concerning this organization.

Gantt (Notes only)

This will allow Notes users access to all of the specialty Gantt chart formats described above in the Charts section.

Review

This will allow you to initiate a review of the organization.

Updating the repository when participants change organizations

When a participant's organization is first set or changed, the existing assignments must be updated in order for the views to properly display the project work. This is done by a background agent, "**Maintain Organization**" is normally scheduled to run periodically to do the same thing. This is usually scheduled to run at night, so changes will not be visible until the next morning.

If you are in a hurry to implement the new organization structure, you may use the manual agent "**Admin\UpdateOrganization**" from the Notes menu. This forces the changes to be made immediately, but may take some time in a large database, and can only be used if you have appropriate rights to modify all the assignments in the database.

Assigning Participants To Organizations

The Participant Profile Document has a field labeled "Organization." This provides a list of existing organizations. Select the correct one for the participant and save the updated participant profile.