Night Report User Manual

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1.0 Introduction

The aim of this document is to explain the procedures for the handling of the computerized night report and other related ones to the Teams at LS. The system, based on the Action Request System (ARS) from Remedy Corporation, has been developed following the conclusion of the working group on SORS. The expected results are the following:

- Use of a data-base for the storage and later retrieval of all information related to operation of telescopes.
- Automatic generation of statistics and reports.
- Easier sharing of information between teams and within them.
- Enforcement of a number of procedures by means of flow control capabilities of Remedy ARS.
- Avoid paper forms and double data filling.

Procedures have been designed after the ones currently applied at LS.

2.0 General Description of Work Flow

The work-flow can be broken into a number of major steps, that will be described on detail later. The units which are being manipulated are called “Action Request” (AR). In this procedure, ARs come in four flavors: “Night Report” (NR), “Problem Report” (PR), “Comment” (CO), and “Request” (RE).

Action Requests are schemas (e.g.: forms) with fields to be filled. The same AR may have different look for the different categories of users (Observers, LS Staff, LS management), showing only the field relevant to a specific category.

Each user belongs to one of the categories, and the identification is accomplished by means of an ARS log-in, in addition to the log-in necessary to access the Unix WS.

2.1 AR Submission

The night report (NR) should be submitted by the observer under his own name. No formality is required for the use of a given name, that is anybody may submit AR. Together with the NR, he can submit one or more problem reports (PR), comments (CO), and requests (RE).

All these ARs have in common the date of the observing night. A given “night” is assumed to last from 8 am of a given morning until 8 am of the following day. Using this parameter all relevant information for a given night/telescope can be retrieved for processing/statistics.

2.2 AR Processing by TTs.

As soon as the night is over, a TT coordinator (TTC) is supposed to process all ARs of the previous night which were produced by observers at telescopes operated by his team. He will perform the following operations:

- Screening. Since anybody may submit an AR, the TTC should first get rid of spurious ARs that may have been entered for a number of reasons. In case of doubt, he will contact the observer asap.
- Complete the information provided by the observer. A minimum of fields are mandatory for the AR to be submitted, in order to simplify the task for the observer. The other fields should be filled by the TTC.
- Store the NR. In case of a missing NR for a telescope, he should contact the observer ASAP.
- Examine PRs, COs, and REs. For them TTC can either decide that

1. the intervention of a Support Team (ST) is required
2. an action is requested from the TT itself
3. a problem should be kept open and monitored
4. the problem is solved and the report can be closed.

2.3 AR Processing by STs

If a PR, CO, or RE was assigned to a ST, the ST is notified by means of an e-mail. The ST notified should open the report and start the requested actions according to the priority and to its work-load for the day. Each time that an intervention is performed, he should write a record with a brief description in the “Diary” field of the report. This is very important for the follow-up of the problem by other members of the Team.

2.4 Problem Solving

Once that the problem has been solved, the ST involved should write down a final conclusion on the problem solved, in the field designated for that. This is also very important for the constitution of a knowledge base who could help in future occurrence of the same problem. The ST assigns the ‘Solved’ PR back to the TT who originated it.

2.5 Problem Closing

The TTC receives back problems as “solved”. If he consider that the solution is satisfactory, he closes the problem. Otherwise he put it back in the “assigned” status and send it to the same or to another ST for further actions. A notification is issued by e-mail.

3.0 Submission by Observers.

The observer at any time during the afternoon or the night may submit a NR.

3.1 User Interface

In a future release the various schemas (that is a forms) could be accessed through a Web browser from any kind of networked computer. However, for the time being the user should log-in into “kila” by mean of an X-term.

3.2 Unix log-in

Observers should log-in as “guest”.

3.3 Client activation

Once logged in kila, observers should activate ARS client invoking the alias

submit

They will be requested to log-in into ARS. They should use their name (First name, space, Last name), no password. The system is case sensitive, so it is important that observers use always the same format for their identification (e.g.: ‘Astro Nomer’, ‘Joe Smith’).

3.4 Report preparation

The schema has a number of fields. The ones labeled in Bold must be properly filled in order to have the report accepted by the system. Fields with menu should be filled from the menu only. Typing values directly may lead to a rejection because the content is checked against the values in the menu at time of submission.

3.5 Report submission

The NR may be kept open for updates or submitted. In order to submit the NR, observers should click on the button “Apply”, on the lower edge of the schema. They will receive a confirmation or a diagnostic, if any compulsory field has not been properly filled. After submitting a report, the Observer should “dismiss” all open forms, and close the User Tool (“File” ->”Exit”).

3.6 Report modification

If Observes wish to modify a report already submitted, they can reopen it with the alias

update

Observers will be requested to log in again into ARS and they should type exactly the same string (First name, space, Last name), in order to be able to access the NR previously entered.

A list of all reports already submitted during the "night" will show up (normally only one should appear). The observer should double click on the right one. The schema will open for modifications.

At the end of modifications, which may involve the submission of additional PRs, COs, and REs, the report should be submitted following the same procedure described above.

It is not foreseen that Observers may access PR, CO or RE already submitted. He can only submit new PR, CO or RE reports, eventually specifying in the comment field that a given report supersedes a previous one on the same subject. However, there is nothing to prevent him from modifying an AR submitted by him, provided that he (or the night assistant) has the required knowledge of ARS.

3.7 Problems, Comments, Requests

In order to submit one of these ARs, Observers should click on the corresponding button on the NR. Once filled, the schema is submitted clicking on "Apply". The schema will stay open for another submission of the same kind. To go back to the NR, observer should click on "Dismiss".

3.8 Printout

Once a report has been has been submitted, the Observer may get an hard-copy opening it as for "update" and clicking on the corresponding button. The report will be printed on the nearest printer. If the button is pressed in the form used for "submit", the report will be printed on the default printer (in the library).

4.0 TT processing.

The TT coordinator (or a team member designated by him) is supposed to have a look to all reports filed during the previous night shortly after 8 am the following morning.

4.1 Unix log-in

TTCs should log-in Kila using the team account (e.g.: 360CAT). This is the account that is notified by e-mail from ARS. This is also the account customized for them. Team members may log-in using their own Unix account, but in this case they will have to customize themselves the ARS client.

4.2 Client Activation

The ARS client is activated typing the alias

aruser

TTC will be requested to log-in into ARS. Whatever account had he used for the Unix log-in, he should log-in with the same log-in name he used in Unix (E.g.: ebarrios, jstorm.), **NOT** with the Team log-in.

He should first pull down the menu “Macro” on the menu bar. There he will select the NightReports first. A list of all new NR related to his team will appear.

4.3 Report existence check

TTC should first check if there is at least one NR for each telescope. If one is missing, he should contact the Observer asap and help him in entering the missing NR. In this case the “Beginning of Night” field should be changed from the default value (which will correspond to the following night) to the actual date of the missing night.

4.4 Single NR check

He should than check that only one report exist for any given telescope. If there are more than one report, he should open and mark as “Rejected” reports that where not submitted by the scheduled Observer. If more than one report were entered in the Observer name, he should clarify with the Observer which is the right one.

Two reports may be present if the night was split between two different programs (carried out by different observers). Night in service observing should produce a single report.

Once the right NR has been identified, he should mark it as “closed”.

4.5 PR handling

Once that the right NR has been identified, the TTC should click the button “New Problems”. A list of all new PR related to his TT telescopes will appear.

He should first perform a selection, discarding PRs not submitted by scheduled Observers. That is double-click on an AR title to open it, write a short comment in the “Final comment” field, and mark it as “rejected”.

Then he should start processing each valid PR. The PR comes assigned to the TT responsible for the related telescope. If there is no need to reassign it, this field should not be changed. The PR should be left in one of the states other than “Submitted” to prevent further modification of certain fields.

If the problem can be closed immediately without further action, it is important that the TTC properly fill-out the “Final comments” field, because this field will go into the weekly report.

If he needs to access some read-only field for the purpose of correcting clear mistakes made by the Observer, he should contact the TSO or somebody in the LS Management.

Once a PR has been assigned to a ST, the ST is notified by e-mail.

4.6 CO handling

When finished with the problems the TTC should address specific comments filled in by the Observer. A list will be obtained with button “New Comments”.

If comments are only of positive nature, the CO may be “Closed” without further action. If the comment contains criticisms, it should be answered in the designated fields before closing it. If some other team should answer the comment, the CO should be “Assigned” to that team. A notification will be generated by e-mail.

If the observer has filled the field “e-mail address”, a mail with the comment and the answer will be sent when the CO will be “Closed.

4.7 RE handling

Last the TTC should check for specific requests, using the button “New Requests”. He should assign them to the related team, or have it processed inside his TT. Status should be left as “Assigned”, until the request is either satisfied or rejected.

In both cases a comment should be put in the “LOG” field at the moment of closing it. The “Assignee” has the right to close this RE.

4.8 Pending ARs

The TTC may at any time check the status of problems, comments, or request choosing the macros “Pending problems”, “Pending comments”, and “Pending Request”. A list will appear. Clicking on one or more lines will open the corresponding ARs for modifications. However, only ARs which are currently assigned to his TT may be modified.

The history of the action performed can be checked in the “Log” field.

4.9 AR closing

The TTC should check daily if there is any problem in “Solved” status invoking the macro “Problem solved”. He should proceed like with pending issues. After performing the corresponding check, he has two possibilities:

1. Accept the problem as “Closed”. He should check that the solution field has been properly filled.
2. Assign the problem to the same or to a different ST, explaining the reason in the “Log” field. Status should again be “Assigned”.

5.0 ST handling

Every morning around 9 am somebody from each ST should log-in into the ST account (mec, elc, oic, irc, swc, odc) in Kila and open a mailer. There he will eventually find notifications from ARS.

If there are notifications of pending ARs, he should activate the ARS client typing

aruser

ST member will be requested to log-in into ARS. ST members should use the same log-in name they use in Unix (E.g.: gihle, agilliot).

5.1 ARs Pending

He should first pull down the menu “Macro” on the menu bar. There he will select the “PendingProblem” first. A list of all PRs assigned to his team will appear. He should go through the list and have the requested action scheduled according to his Team’s workload and problem severity. If a problem cannot be solved by a single intervention, every time that something is performed he should put a message in the “Log” field, briefly stating the action performed.

5.2 ARs Solved

Once a problem has been solved, the team member who did it should perform the following operation in the corresponding AR:

1. Fill the “Conclusion” field: this is important in the long term because it will go into the knowledge base of that telescope. It should contain all the necessary information for the solution (or the work-around) of that specific problem.
2. Assign back the AR to the TT who originated it.
3. Put the AR in “Solved” status.

5.3 Other ARs

In the case of CO or RE, the procedure is the same. However, in this case once that the comment has been answered or the request satisfied, the ST member will put the AR directly in the “Closed” status.

6.0 Changing password

ARS accounts are created without password. User should define a password asap following the following procedure:

1. Log-in ARS with their own log-in name, without password.
2. From the “File” menu choose “Open Schema...”. A selection box will appear.
3. Select “User” and click on “Apply” (or double click on “User”).
4. From the “Edit” menu choose “Clear all”
5. Enter its own log-in into the “Log-in” field
6. From the “Query” menu choose “Modify Individual”. A form will appear.
7. Type the password into the designated field.
8. Check the correctness of other fields. Correct them if necessary.
9. Click on “Apply”.
10. Click on “Dismiss”