Observation Collection Program v5.0

Quick Start Guide

Edition 3.0

Joint Analysis and Lessons Learned Centre

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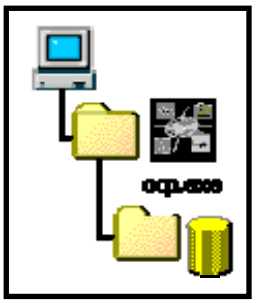
Introduction

Observation Collection Program (OCP) is an analysis tool which allows observers to work on a project, as individuals or in teams, noting observations in a systematic and easily-recoverable manner. Additionally, the software allows the observer to input data directly into the NATO Lessons Learned Database without the need to re-format fields or text.

Additional guidance may be found in the *OCP Administration Manual* and the *OCP User's Manual*, and directly from the IT support branch at the JALLC.

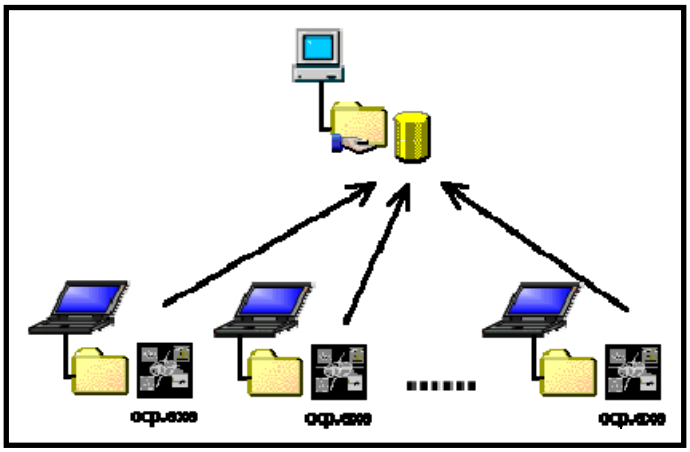
Installing OCP

OCP can be set up in three ways: as a Local Standalone system, as a Network Server (as a database only) and as a Network Client (as an application only). The Network Server and Network Client method allows multiple users, for instance a project team or Reachback contacts, to share observations and to store observations on a single database.

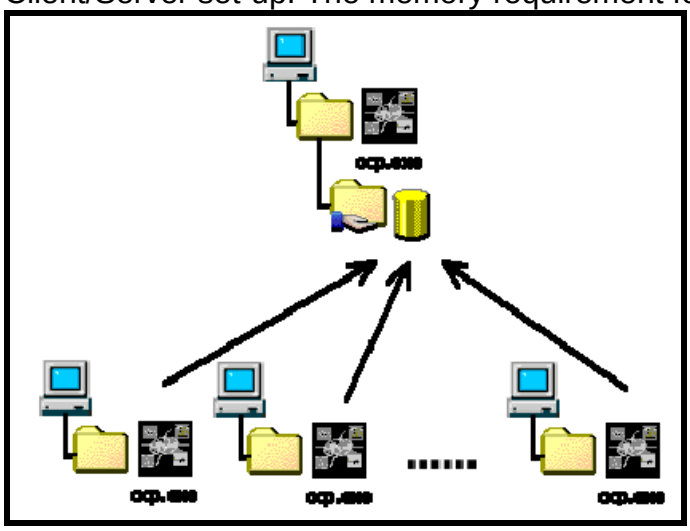


The **Local Standalone** system method allows the user to run all aspects of OCP and to record observations. This would be applicable to a single project officer using a laptop, for instance.

The **Network Client** method allows a central, communal area to be created in one computer, to which other computers (clients) have access via a Local area Network (LAN). This would be applicable to a project team in the field with more IT resources or a fixed Reachback or hub. The memory requirement for the hub is 20Mb.



The **Network Server** method provides the central database for the Network Client/Server set-up. The memory requirement for the hub database is 50Mb.



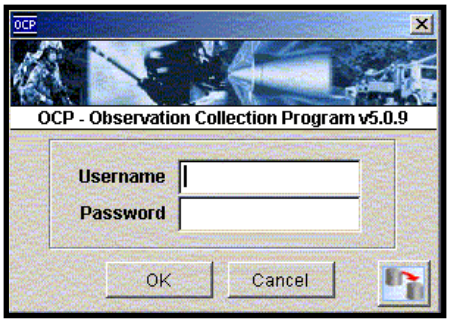
Loading the Relevant Method

Access to the OCP setup files may be made either via the JALLC website or by a CD ROM. Create a temporary folder called OCP, ideally on your Desktop. From the JALLC website select **Documents** at the Top Level Menu, then **Analysis Tools**. Click on **OCP 5 Set-up**, then **OCP509(Oct05)**. Browse for the OCP folder on your desktop and select **Save** from the dialogue box. Check the **Use Folder Names** and **All files/folders in Archive** selection boxes. Click **Extract**. Open the OCP folder and click on the fox icon.

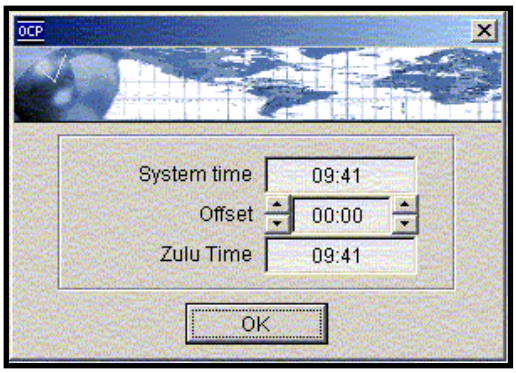
Alternatively, insert the CD ROM into the PC. The installation will start automatically. If it does not, right-click on the CD icon on **My Computer** and select **Run**. At the title page, click **Next>**. The next option offered is: where to install the application - the C: drive default is sufficient. Click **Next>** to accept.

The final option is the **Setup type**. The options are described above: select whether your computer is standalone, a network server or a client computer, and click **Next>** and then **Finish** to complete the installation.

On running the program the welcome box requests a Username and Password. The initial username is **admin** and the password field should be left **blank**. Click **OK** to confirm.

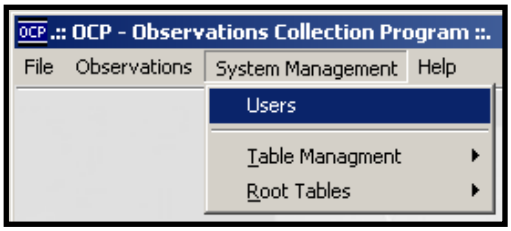


Users are given the option of offsetting the system time from Zulu time, by using the arrow icons.



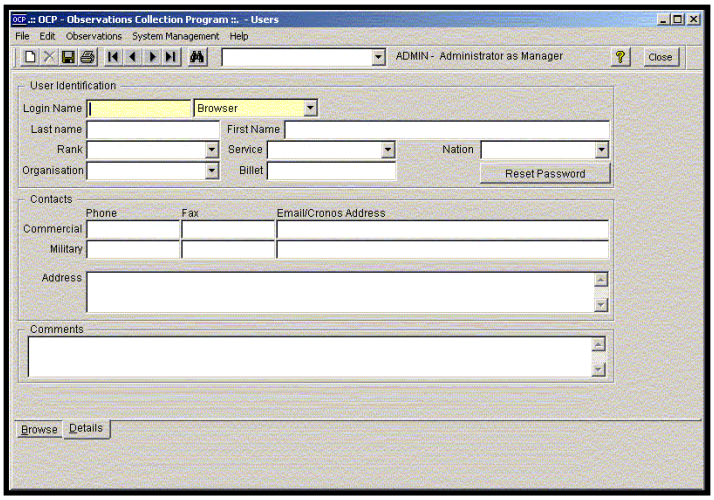
Pre-Deployment Preparation

Prior to deployment OCP requires certain set-up information, inputted by the user/manager, to prepare the observation database and to facilitate systematic record-taking.



To register a new user, click on **System Management** and select **User**.

In the User page select the **New Document** option. This will open a **User Identification** sheet which allows the new user to input personal data. Most fields are freetext and pre-determined fields are selectable by drop-down menus.



On completion of the details save the information using the **Save** icon.

Thereafter the System Management may need to be altered to complement the requirements of the observer. The **Table Management** and **Root Tables** may be edited using existing templates, or additional criteria may be added. It is suggested that, where several users are cooperating on a project, the parameters are agreed or set by one project coordinator in advance of the software being installed. Definitions may be found on page **8**.

The Table Management headings are:

- ☐ **Activity** (freetext, e.g. Allied Warrior 2005)
- ☐ **Events** (freetext, e.g. O Gp, Planning Conference, etc)
- ☐ **Objectives** (freetext, requires an ID and Description)
- ☐ **Issues** (freetext, requires an ID and Description)
- ☐ **JMETL** (Joint Mission Essential Task List: select pre-set options)
- ☐ **MEL/MIL** (Main Events List/Main Incidents List: select pre-set options)
- ☐ **Levels in Activity** (Political, Strategic, Operational, Tactical: select pre-set options)
- ☐ **References in Activity**

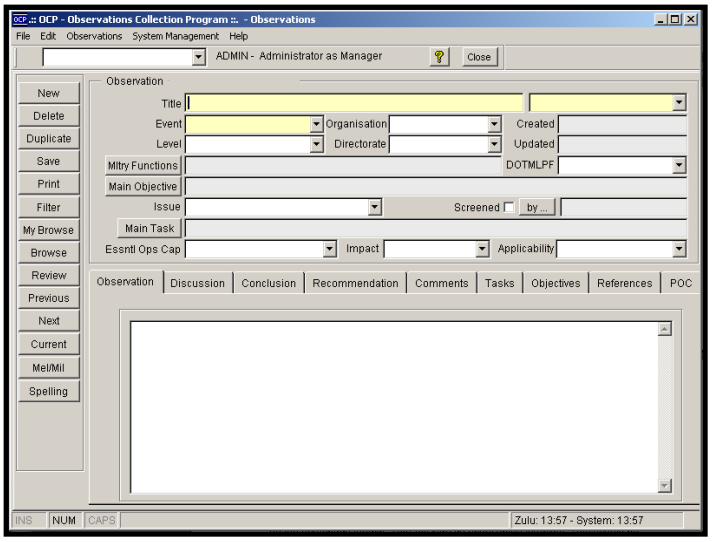
The Root Tables headings are:

- ☐ **Tasks** (from the NATO Task List: select pre-set options)
- ☐ **References**
- ☐ **Levels** (Political, Operational, Tactical: select pre-set options)
- ☐ **Directorate** (J1 Personnel, J2 Intelligence, J3 Operations, J4 Logistics, J5 Planning, J6 CIS, J7 Training and Exercises, J8 Budget and Finance, J9 CIMIC)
- ☐ **DOTMLPF** (Doctrine, Organisation, Training, Materiel, Leadership, Personnel, Facilities: select pre-set options)
- ☐ **Military Functions** (select preset options)
- ☐ **EOC** (Essential Operational Capability: interoperability and flexibility, timely force availability, effective intelligence, deployability & mobility, effective engagement, effective C3, logistics, sustainability, survivability & force protection)
- ☐ **Organization** (i.e. NATO formation: select pre-set options)
- ☐ **Classification** (i.e. security classification: select pre-set options)
- ☐ **Ranks** (i.e. NATO ranks: select pre-set options)
- ☐ **Nations**
- ☐ **Services**
- ☐ **Applicability**
- ☐ **Impact** (1: Mission Critical, 2: Mission Desirable, 3: Mission Useful: select pre-set options)

These settings need to be inputted onto each computer contributing to the database. Default settings are confirmed by clicking the check box at the far right edge of the option. Fields backed in yellow are mandatory, in white are optional, and in grey are read-only. Activity or Event **ID** may be the acronym or identifying abbreviation given to an activity, event of part thereof.

Using OCP

Inputting Observations



When observations are to be entered into the database, click on **Observations** on the homepage toolbar. This will load an observation template. This should be completed as fully as possible, noting that fields backed in yellow are mandatory (e.g. Title, Event), in white are optional (e.g. DOTMLPF, Impact etc), and in grey are read-only (e.g. Main Task, Main Objective). All options are related to the criteria set up in the **Root Tables** and **Table Management**. If these are found to be restrictive they can be augmented via the **System Management** menu.

The criteria for each heading are described below, and correspond to the Lessons Learned Database criteria. The **Reference** box allows cross-reference to relevant documents and the creation of accessible hyperlinks. The **Task** box shows references to the NATO Task List. The **POC** box allows a relevant point of contact to be cited for the observation.

Note that comments can be added to the observation by several users, with their details and date added automatically into the observation record. Observations are searchable via the **Filter**, **Browse** and **My Browse** functions, and by scrolling via the **Next** and **Previous** functions.

Each individual field may be spell-checked using the **Spelling** button on the left hand side of the screen. Each field must be checked individually. The suggestions and corrections are given in the standard MS Word format.

Importing and Exporting Observations

Observations may be imported into the OCP database, and exported to archives or the Lessons Learned Database (see below). To export the observations (for instance, as a back-up or to share data), from the OCP top level menu select **File** and **Export Collection**. Click on **Export File Destination** and select the relevant location. The Export Collection window offers six export options: **Full Export/Back-up** for all observations; **Current Activity Only**, for observations

relating to the highlighted activity; **Related to a Specific Task**, browsable via the drop-down menu; **Created After**, requiring a date input; and **Unclassified & Restricted Only**. The **Begin Export** option starts the data transfer.

To import data from another source, from the OCP top level menu select **File** and **Import Collection**. Click **Source Files Location** and browse for the source of the data. The Import Collection window offers five options: **All Observations in Collection**; **Current Activity Only**, browsable via the drop-down menu; **Commented By**, browsable via the drop-down menu; **Created After**, requiring a date input; and **Unclassified & Restricted Only**.

Transferring to the Lessons Learned Database

Database managers (or Standalone Users) can export data to the NATO Lessons Learned Database using an XML format file. From the OCP top level menu select **File** and **Export to LLDb**, then select the appropriate **Activity** and contribution **Organization**. Clicking **Export** will offer a destination for the data, from where the records can be uploaded into the LLDb.

The program offers the appropriate file location for the data to be stored: click **Save** to accept.

Definitions

Activity - A planned occurrence elected as a target to OCP. The set of data (mainly observations) related to one activity constitute a collection, e.g. MNE 4.

Event - Typical events are the planning meetings for the activity, the deployment phase, the warm-up and the actual activity period.

Objective - The analysis or activity objectives that form the basis of the analysis or activity plan.

ID - The operation, experiment or exercise acronym or abbreviation, e.g. AW04, MNE4 etc.

Issue - An issue is a problem area general description applicable to an activity

JMETL - The Joint Mission Essential Task List is a list of tasks from the NATO Task List that are identified as essential for the activity.

MEL/MIL - The Main Event List and Master Incident List provide the activity planner with the opportunity to steer the activity by injecting events and incidents during the course of the activity. The purpose of the MEL/MIL here is to ensure

that observers are aware of upcoming incidents so they can observe how participants are reacting.

NATO Task List* - The complete task list description (Strategic, Operational and Tactical) is detailed in Bi-SC Directive 80-90.

References - The list of documents and/or publications which are of interest to the observer when documenting and supporting their observations.

Level* - Classification applicable to the activities. It may be Political, Strategic, Operational or Tactical.

Directorate* - Staff Functions J1 to J9; also civilian functions are required.

DOTMLPF* - Doctrine, Organization, Training, Materiel, Leadership, Personnel, Facilities.

Military Functions* - List of military functions.

EOC* - Essential Operating Capabilities. The MC guidance for 'The Military Implementation of Alliance Strategy' details seven capabilities that are essential for the Alliance forces and HQs to accomplish successfully the full range of missions.

Organisations* - The observations are mapped against the organization to which they apply.

Classification* - List of security classifications

Ranks* - List of Ranks

Nations* - List of Nations

Services* - List of Services

Applicability* - The applicability of each observation is scored on a scale of 1 to 3, where 1 is an observation applicable in the majority of circumstances, and 3 is an observation that has a large number of caveats.

Impact* - The impact of each observation is scored on a scale of 1 to 3, where 1 is an observation which is mission critical, and 3 is an observation that is mission useful.

(* This list is loaded into the database during OCP installation and appears as a drop-down menu option)

Criteria for Observations

The **Observation Title** should be brief but specific and illuminating.

The **Observation Description** briefly covers *what* happened. Observations should be restricted to single issues: multiple issues should be divided into individual observations and cross-referenced to each other within their discussion.

The **Discussion** is the main part of the Observation: the discussion of why the issue occurred. This can include the history of the event, the *what*, *where*, *when*, *why* and *how*. While comprehensive this should be as brief as possible.

The **Conclusion** develops from the Observation Description and Discussion as a brief summary of the underlying issue with which the Observation is concerned. It should avoid detail and repetition, and contain no new information.

The **Recommendation** should be as specific as possible, with references to relevant publications, procedures, ORBATs etc. The aim is to channel review and remedial processes as swiftly and effectively as possible: thus, it should contain a recommended AB and RA.

References

Observations Collection Program User's Manual, JALLC, December 2004

Observations Collection Program Administration Manual, JALLC, January 2005

JALLC Lessons Learned Database Quick Start Guide Version 3.0, JALLC, July 2008

Joint Analysis Handbook Version 3.0, October 2007