

Observation Engine Controlled-Pilot Analyst Guide

Observation Engine helps document-heavy teams turn narrative source material into structured observations while preserving the evidence and analyst decisions behind each value.

This guide covers the complete controlled-pilot workflow: obtain an approved installer, choose storage, import a document, annotate, finalize, search, export XLSX, and request support.

Name you may see on Windows

The product is **Observation Engine**. The current approved Windows installer is named `DataOrgSetup.exe`, and some installed shortcuts or windows may still display **Data Organization** while desktop rebranding is completed.

Before You Begin

Your pilot coordinator should provide:

- An approved organization-managed Windows environment.
- Access to the Observation Engine pilot portal.
- A named support owner.
- A decision to use **This computer** or an approved existing SQL Server.

The portal assigns each named analyst an individual, time-limited entitlement to one exact approved installer. Do not share the installer or a download link. The portal shows the installer name, digest, and approved scope for your grant.

Current Pilot Boundaries

- Windows desktop package.
- `.docx` source documents only.
- Predictions disabled.
- Controlled distribution to named analysts.
- LocalDB or an approved existing SQL Server.
- XLSX export from finalized records.

The current package is not an Authenticode-signed, elite-shell, two-machine LAN, or concurrent-runtime claim. Windows may show an unfamiliar-publisher warning. Use the installer only after your organization and pilot coordinator approve it.

Quick Path

1. Sign in to the pilot portal, review **Access status**, and download your exact approved installer.
2. Install on the approved Windows device, choose storage, and sign in with your work email.
3. Import a `.docx` document, then annotate and review the required facts.
4. Finalize the record, find a value in Records, and export XLSX.
5. Use **Report issue** if something goes wrong.

1. Get The Approved Installer

1. Open the portal link from your verification email.
2. Confirm that your status is **Approved** and your email is listed as active.
3. Review the artifact identity and pilot scope shown for your grant.
4. Select **Download installer**. A download link is short-lived and is for your use only.
5. Run only the `DataOrgSetup.exe` delivered through your own access record.

If the link expires before the download starts, return to **Access status**. Do not forward a link, paste it into a support request, or save it in shared notes. Contact your support owner if your two download issuances are exhausted.

2. Install And Open Observation Engine

1. Double-click `DataOrgSetup.exe`.
2. If Windows shows an unfamiliar-publisher warning, stop and confirm with your pilot coordinator that this is the approved controlled-pilot installer.
3. Keep the default per-user install location unless your pilot coordinator instructs otherwise.
4. Keep **Launch Data Organization after setup** selected, or open **Data Organization** from the Start menu.
5. Complete the first-run checklist shown in the app.

The current installed application may open in your browser while the local Observation Engine runtime runs on the same Windows profile. This does not make it a hosted service, and your source documents are not uploaded to the pilot access portal.

3. Choose Storage

This Computer

Choose **This computer** for a single-analyst pilot on one approved workstation. Observation Engine uses bundled SQL Server LocalDB and keeps data in the current Windows profile.

Use Existing SQL Server

Choose **Use existing SQL Server** only when your pilot coordinator or DBA has provided an approved server, database, authentication method, and backup plan.

1. Enter the values supplied by the DBA.
2. Select **Test connection**.
3. If setup or upgrade is requested, confirm the DBA-approved backup or restore point before continuing.
4. Select **Save connection**.

SQL-auth passwords are stored in Windows Credential Manager. Never place a SQL password, connection string, server address, or database name in the pilot portal, issue reporter, email, screenshots, or shared notes.

4. Sign In And Import

On the sign-in step, enter your work email address and select **Sign in**.

From Home:

1. Drop or select a `.docx` source document.
2. Wait for conversion and ingestion to finish.
3. Open the draft session created for that document.

PDF input is not part of the controlled pilot. Do not convert or rename a PDF to make it look like a DOCX file. If an approved DOCX import fails, keep the original file unchanged and report the issue before repeated retries.

5. Annotate And Review

In the annotation view:

1. Read the source text or table content.
2. Select the evidence span for the fact.
3. Complete the fact fields shown by the composer.
4. Save the fact.
5. Repeat until the record contains the facts required for review.

Predictions are disabled. Treat every fact as analyst-entered and verify it against the source.

6. Finalize

Finalize only after the record has been reviewed.

1. Open the review or finalize action.
2. Resolve blocking messages about missing, conflicting, or stale facts.
3. Confirm that the app reports a finalized record.

If finalization fails, do not edit application data or logs by hand. Use **Report issue** or create a support bundle.

7. Find A Value

Use **Find by value** in Records to locate finalized facts by their value.

1. Enter at least two characters.
2. Review the returned fact value and record link.
3. Notice any **Unverified** badge before relying on the result.

Search is intentionally useful for analyst retrieval. Unverified records can appear in search, but they remain excluded from controlled export and model corpus surfaces until they pass the integrity boundary.

8. Export XLSX

After records are finalized:

1. Open the dashboard or Records area.
2. Use **Export XLSX** for the intended summary or selected records.
3. Open the downloaded workbook.
4. Confirm that the expected Facts, Records, and Audit sheets are present and readable.

Do not treat a search result alone as an approved export. The export controls enforce the verified-record boundary separately.

9. Report An Issue

When The App Is Running

Use **Report issue** in the application.

1. Choose the interface element related to the problem when prompted.
2. Select the issue type and severity.
3. Describe the behavior without copying source-document content.
4. Submit the report.

The reporter sends a redacted comment and structural interface metadata. It does not send screenshots, files, document text, accessible labels, SQL details, or credentials. If the relay is unavailable, one redacted report is queued locally for the support bundle instead of being presented as filed.

When The App Cannot Start

1. Open the Windows Start menu.
2. Launch **Data Organization Support Bundle**.
3. Wait for the command window to finish.
4. Review the generated zip location.
5. Send the bundle only to your named support owner through the approved channel.

The support bundle is generated without requiring the app server. Review it before sharing. Never add source documents, screenshots, credentials, patient or client information, or signed download links to the bundle or message.

10. Backup, Restore, And Upgrade

For **This computer**, coordinate backup or restore with your support owner and stop Observation Engine before copying LocalDB files.

For **Use existing SQL Server**, the DBA owns backup and restore. Confirm the restore point before setup or upgrade. If a restored database is used from a different Windows profile, save the SQL-auth password again in first-run setup or the Database settings.

For every upgrade:

- Obtain a new entitlement to the exact approved installer.
- Do not use a public pointer, copied link, or previously downloaded installer unless the portal still identifies it as your approved artifact.
- Preserve data according to the approved LocalDB or DBA backup plan.

Troubleshooting

Problem	What to do
Access status is pending	Wait for the pilot approver. Email approval alone does not create an entitlement.
Verification link expired or was already used	Request a new link from the Access page. Links are single-use.
Download allowance is exhausted	Ask your support owner to request an audited reset. Do not borrow another analyst's link.
Windows shows an unfamiliar publisher	Stop and confirm the installer with your pilot coordinator before continuing.
App does not open	Wait briefly, then reopen it from the Start menu. If it still fails, create a support bundle.
DOCX import fails	Keep the original unchanged and use Report issue. Do not submit the document itself.
SQL connection fails	Recheck only the values supplied by the DBA; never paste them into a support message.
SQL password is missing after restart	Save the approved SQL-auth profile again from the same Windows user.

Problem	What to do
Finalize is blocked	Resolve the displayed fact conflict or missing-field guidance. Report the issue if it persists.
XLSX will not open	Re-export after confirming the record is finalized. Report the issue if it repeats.

Support Checklist

When escalating, provide only:

- Your name, organization, and team.
- The approximate time of the problem.
- The action you attempted and the result you expected.
- Whether you use **This computer** or **Use existing SQL Server**.
- The redacted issue reference or support bundle requested by your support owner.

Do not include source documents, filenames, document text, screenshots of source material, patient or client data, SQL details, passwords, tokens, or signed download links.