

Calendar & Scheduling, PalmPilot® & IBM WorkPad® Agent Administration

Introduction

Project Gateway provides some interaction with the Notes Calendering & Scheduling (C&S). The Lotus Notes EasySync(TM) tools provide a desktop link to support the use of PalmPilots and IBM WorkPads. There is no direct connection between Project Gateway and the personal organizer, rather Project Gateway provides information to participant mailboxes which in turn is synchronized to the PalmPilot or Workpad personal organizer.

This is a one way integration. Information flows from Project Gateway to the organizer, but Project Gateway does not receive information from the organizer.

The transfer of information is done via mail. The Project Gateway database mails "Task" documents to the users Notes mailbox. These documents are then uploaded to the organizer.

There are three agents provided with the Project Gateway system that are used for this purpose.

1. The "ProjectGo! Assignment Transfer Agent" sends task information to participants. This agent should be scheduled for nightly operation.
2. The "ProjectGo! Dashboard Transfer Agent" send project status information to project and program managers. This agent should be scheduled for nightly operation.
3. The "Project Go! Mailbox Agent" should be installed in each recipient's Notes mailbox database to remove outdated messages. See the next section.

Recipient Mailbox Setup

Since task dates and dashboard information often change, an individual may be sent several messages for each assignment or project. To keep them from having to manually cull out the duplicates, we provide an

agent that you can add to your Notes mailbox database. This is called the "Project Go! Mailbox Agent."

As a means of distribution, we have included the agent in the Project Gateway database design. It is not, however, intended to be enabled in Repository Center. What you should do is to copy the agent from the Project Gateway database into your mailbox database(s) or mailbox template so that it is available to the repository users who want to use this feature. You can install this as a private or shared agent.

If you do not allow the use of this mailbox agent we suggest that you do not activate the ProjectGo! Dashboard Transfer Agent and tell users to use only the "Send Once" setting in the Participant Profile.

Using the ProjectGo Mailbox Agent

Copy the "ProjectGo Mailbox Agent" from the Agents section of the Repository Center design and paste it into the design of your mailbox.

The agent should be either set to run on new or modified documents, or to run daily in the morning after any mail sent by Project Gateway agents in the previous evening would have been delivered.

This agent looks only at messages that originate from the Project Gateway system and deletes those which are outdated when newer information arrives about the same task or project. It also removes these messages from your Inbox folder.

Assignment Transfer Setup

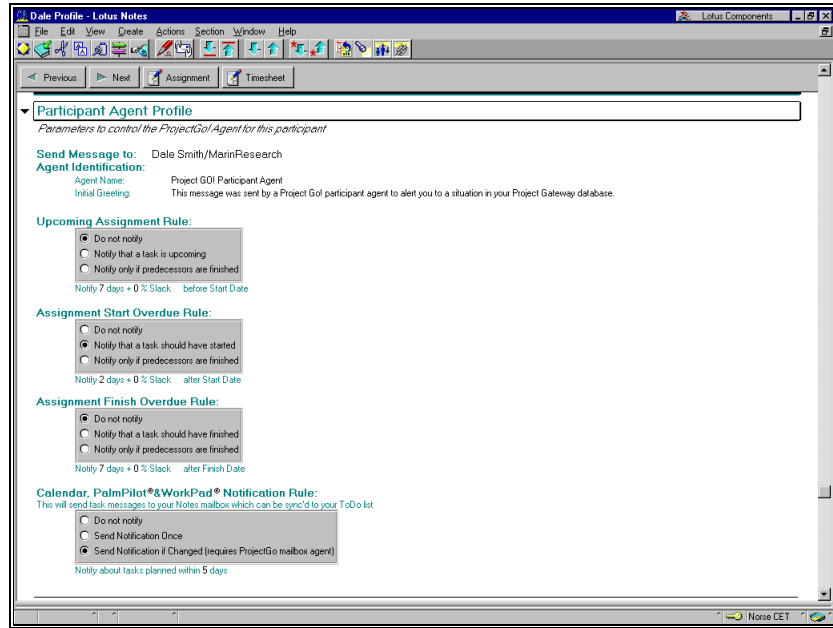
Tasks are mailed to participants if instructed by Calendar rule in the participant agent profile settings. The "Send Messages To" field must also be filled in and the ProjectGo! Assignment Transfer Assignment agent must be running.

Calendar/PalmPilot & WorkPad Notification Rule - this enables the sending of email to your note's mailbox for upcoming assignments. These tasks appear in the "To Do" section of your Notes mailbox. The parameter sets the time range into the future for which messages will be sent.

Note: Marin Research provides the ProjectGo! Mailbox Agent that is designed to be run in your mailbox to recognize updated tasks and eliminate duplicates. If you have installed this agent, then you should use the "if Changed" option. If not, you should only use the "Send once" option.

When the Assignment Transfer Agent runs, it will send one email for each assignment that meets the conditions. However, it will never send more than 100 emails to single participant.

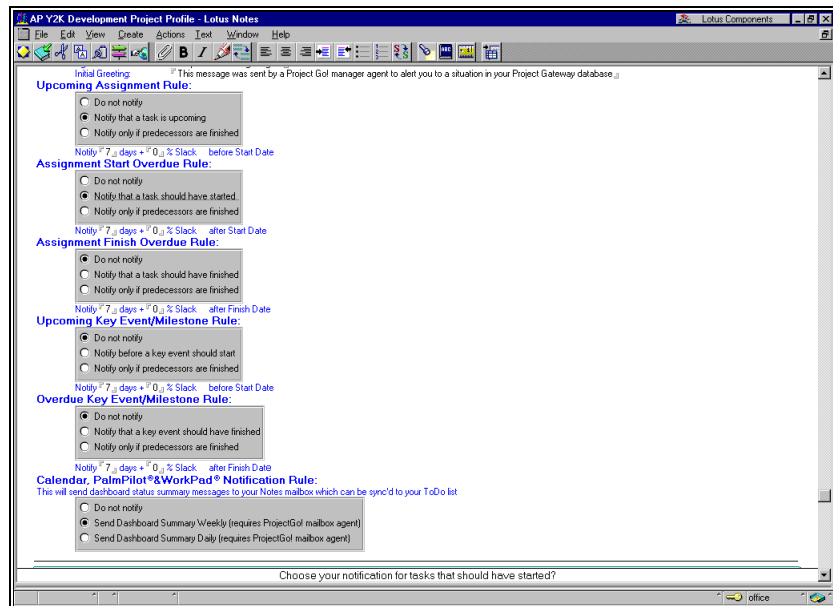
The email will contain the name of the task and a memo of supporting information including planned task start and finish. When these task documents are hotsync'd to the organizer they will appear in the ToDo application as one line entries with attached memo fields.



Dashboard Transfer Setup

Project Manager setup Dashboard Transfer operations in the Project Profile. Each project is controlled individually.

The dashboard report will appear as a task whose title is the project name. In the attached memo field will be an abstract of the dashboard statistics for this project.



Project Profile Setup

To send dashboard status:

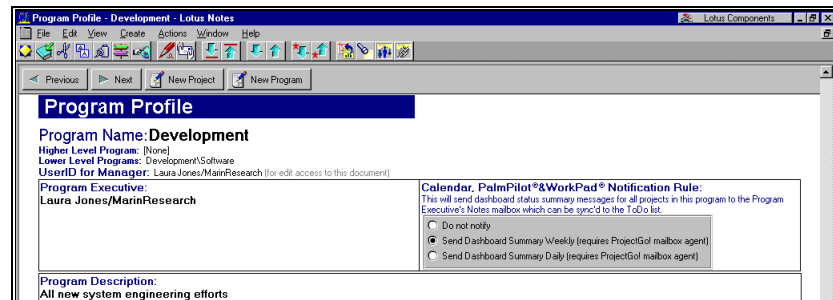
1. The Calendar/PalmPilot agent option must be enabled in the management agent setting section,
2. Send Messages To field must have the mail name,
3. The "Don't Show on Dashboard" option must not be set.
4. The "Mark as Completed" option must not be set.
5. The ProjectGo! Dashboard Transfer Agent must be running.

Note: The ProjectGo! Mailbox Agent should be installed (to prevent the accumulation of outdated reports).

Program Profile Setup

Program managers configure dashboard transfer from the Program Profile. They will receive dashboard reports for all projects in that program that do not have "Hide from Dashboard" option checked.

The dashboard messages will be sent to the name specified in the program manager field to the right of the Calendar/PalmPilot option. If the program manager field does not contain a valid mail address, then nothing will be sent for this program.



The program manager will receive the same dashboard reports as are sent to the project manager. These will appear as one task per project, with an attached memo.