

Participants

The Participant Profile

Repository Center provides a variety of services for project participants. It provides timesheet reporting, automatic notification of upcoming tasks, tabulates workload and allows secure control of information. All of these services are linked to a Participant Profile created for each person.

A new participant profile is created using the "create new participant profile" action on the Participant navigator. Participant profiles can also be created during publication or synchronization of project plans if this is allowed by the system administrator. Note that profiles created automatically are incomplete and require manual review to set the correct user id and timesheet options.

Once you have saved the participant profile document, you can compose assignments for this person.

Participant Profile	
Participant Name: Davidson James	
Organization:	Development
Reassignment Required:	No
User ID for Participant: <small>(for edit access to assignments)</small>	Jim Davidson
Send Message to: <small>(for automatic notifications)</small>	Jim.Davidson@MarinResearch
Phone:	Office: 414-461-9784 Mobile: Other:
Description:	Systems designer and programmer
▶ Reports	
▼ Participant Timesheet Profile	
Overhead Categories:	Vacation, Sick Leave
Requires approval:	No
People who can approve timesheet: <small>(notification is sent to first person listed)</small>	Jim Davidson
People who can create timesheet: <small>(should be specified, otherwise anyone can create a timesheet for this participant)</small>	Jim Davidson
People to notify about missing timesheets:	Jim Davidson
Timesheet Initiation:	By User
▶ Participant Agent Profile	
▶ Document Access and Edit Log	

Displaying a Participant Profile in a Notes Client

Participant

The participant name is set to the name used in the project management application for this person. We strongly recommend then names be in

the form *lastname firstname* since they will be shown in alphabetical order in many views. Please avoid using any punctuation such as commas, double spaces, or ampersands. The system will validate names when they are entered manually.

Note: The participant name can be changed at a later time using the Identification function.

Reassignment Required

This field is set to Yes for those participant names that have been used to identify skills or job classifications rather than real individuals. This indicator is used by the ProjectGo! agents to alert managers to the need to reassign work to real people before the assignment can begin.

UserID for Participant

Enter the Notes UserID for the real person associated with this participant. This will be the individual when the resource is a person, or the manager when the participant resource is used as a placeholder and marked for reassignment.

When the UserID is changed, system agents will update all assignments of this participant to record the new id in the document access control. This update process normally will be done at night. A person with the role of [PGADMIN] can force the system to update all documents immediately using the Admin-UpdateOrganizationsNow agent

If your user name is listed as the first entry in the User ID field, then a link to this profile will appear in the My Responsibilities list that is linked to your login name displayed in the center panel of the Repository Center home page.

Note: If you have a Notes ID as well as web access, you may have a different login name from the Web browser. If that is the case, then put both user names in the UserID field with the web name first.

Send Messages To

Enter the UserID or external email address to which messages should be sent about this participant. These messages can originate from the assignment tracking functions or the Note function or other parts of the systems. In most cases this should contain the same information as the UserID field.

Phone

Enter the office and mobile numbers in the fields provided. Use the other field to list all other contact numbers.

Description

This field may be used for recording phone numbers, physical location or other useful information.

Organization

This field is a keyword field used to categorize participants into a convenient hierarchy. Editing this displays a list of Organizations defined for this database. The Organizations should be defined by creating Organization Profiles before the participants are assigned to them. See the Programs and Organizations chapter for more details.

When the organization selection is changed, system agents will update all assignments of this participant to record new organization code so that the assignments will appear in the proper view groupings.

This update process normally will be done at night. A person with the role of [PGADMIN] can force the system to update all documents immediately using the Admin-UpdateOrganizationsNow agent.

The screenshot shows a web browser interface for a Participant Profile. At the top, there is a navigation bar with buttons for Previous, Next, Assignment, Status, Timesheet, Identification, Todo, Schedule, Edit, and Note. Below the navigation bar, the page title is "Participant Profile" and the participant name is "Davidson James". The profile details include:

- Organization: [Development](#)
- Reassignment Required: No
- UserID for Participant: Jim Davidson
- Send Message to: Jim Davidson/MannResearch
- Phone: Office: 414-461-9784; Mobile: Other
- Description: Systems designer and programmer

Below the profile details is a "Reports" section with three columns:

- PARTICIPANT REPORTS**:
 - [Current Assignments Report](#)
 - [Overdue Assignments Report](#)
 - [Participant Status Reports](#)
 - [Custom Todo Report](#)
 - [Recently Created Assignments Report](#)
 - [Assignments View](#)
 - [Workload View](#)
 - [Open Latest Timesheet](#)
- USER: Jim Davidson**:
 - [Issues Report](#)
 - [Risks Report](#)
 - [Scope Changes Authored Report](#)
 - [Scope Changes Investigated Report](#)
 - [Documents Authored Report](#)
 - [Deliverables Owned Report](#)
 - [Locate Teams](#)
- OBSERVATORY ANALYTICS**:
 - [Executive Summary](#)
 - [Work vs. Capacity](#)
 - [Skill Distribution](#)
 - [Upcoming Work](#)
 - [Recent Work](#)
 - [All Planned](#)
 - [Overdue Work Trend](#)
 - [Hours Remaining Trend](#)
 - [Work Details](#)
 - [Briefing](#)

Displaying a Participant Profile in a Web Browser with Observatory access enabled

Reports Section

This section provides access to the various reports that the system will generate for this participant. Web users will see a list of report titles. Notes' users will see a button that, when clicked, will display a list of available reports. These reports will be generated in HTML format and browser window will be automatically opened for properly configured Note clients. The Reports options will not appear if the database is not preconfigured to support browser access.

If the repository is connected to a Project Observatory system, a collection of additional report options will appear to provide immediate access to Observatory Briefings and other graphics.

In the "Make a link" section, you can put direct references to any chart in the repository that you might want to check, such as your personal work chart or the chart of one of the projects you are working on. On

the right side you can put direct references to any document in the repository, on your corporate intranet, or, if you have access, to any document on the world wide web.

Participant Timesheet Profile

Overhead Categories

This is a list of all the overhead categories that will appear in this person's timesheet when the "Add My Tasks" action is used. You can add or remove category names from this list by editing the document. The initial categories that appear here are inherited from the Overhead Categories settings in the Field Map document at the time the participant profile record was created in the database.

Requires Approval

This is a Yes/No field. If Yes, it means that this person's timesheet must be reviewed and marked for approval by someone else before it can be posted to the assignments. Note that project managers can automatically monitor timesheet submissions that affect their projects without needing to be approvers.

People who can approve timesheets

This is the list of UserID's of the people who may approve a submitted timesheet for this person. The first person on the list will be notified by email when a timesheet is submitted for approval.

People who can create timesheet

If blank, anyone can create a timesheet for this participant, otherwise select the people who should have this ability. Usually this would be the participant, the department admin, and the department manager.

People to notify about missing timesheets

If blank, then no one will be notified. If one or more usernames are entered, then email will be sent to those people if the Missing Timesheet Agent or Missing Timesheet Reminder Agent is running and if no timesheet has been submitted for the week that the agent is checking. See the Project Gateway Administration Manual.

Timesheet Initiation

This selects the method used to create timesheets.

By User allows the participant to create timesheets.

By Agent means that the system will create new timesheets and send an email to the user with a link to the timesheet. There are two variations, Note timesheets and Web timesheets.

By User or Agent means that the agent will create a timesheet if the user has not already done so at the time the agent runs.

Via Portal means that this participants timesheets are supposed to be created using the Enterprise TimePortal application rather than here in

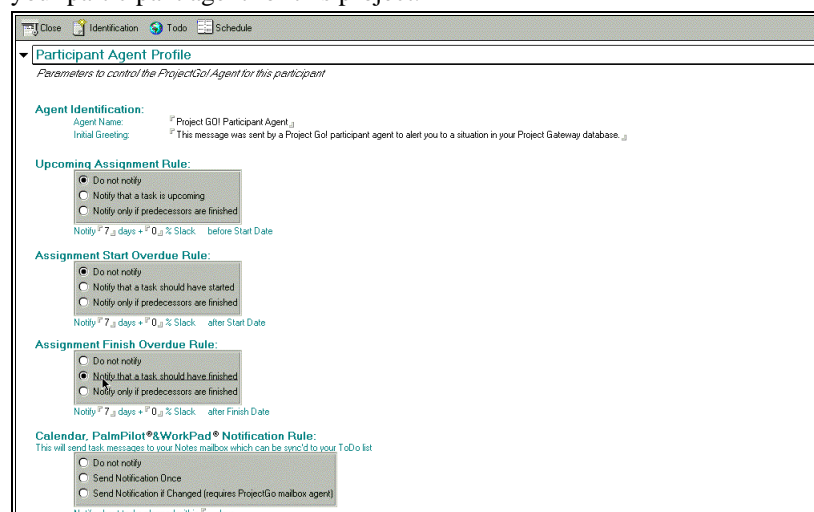
the repository. The ETP is used when this person's work is found in more than one repository.

No Timesheet Allowed means that no timesheets can be created for this participant. There are two common uses for this option.

1. It should be used when the person has left the organization, but there are completed assignments still in the repository for ongoing projects.
2. It should be used when the participant is marked as "Reassignment Required."

Participant Agent Profile Section

Each participant assigned to a task in a Project Gateway database has a Participant Profile form. The top of this form displays the participant name (as used on the assignment forms) and provides a place for an optional description. The rest of the form is used to set the behavior of your participant agent for this project.



The screenshot shows a web-based form titled "Participant Agent Profile". At the top, there are tabs for "Close", "Identification", "Todo", and "Schedule". Below the title, there is a sub-header "Parameters to control the ProjectGo! Agent for this participant". The form is divided into several sections:

- Agent Identification:** Includes fields for "Agent Name" (set to "Project GO! Participant Agent...") and "Initial Greeting" (set to "This message was sent by a Project Go! participant agent to alert you to a situation in your Project Gateway database...").
- Upcoming Assignment Rule:** Contains three radio button options: "Do not notify" (selected), "Notify that a task is upcoming", and "Notify only if predecessors are finished". Below these is a field for "Notify" with a value of "7" days and "0" Slack, set to "before Start Date".
- Assignment Start Overdue Rule:** Contains three radio button options: "Do not notify" (selected), "Notify that a task should have started", and "Notify only if predecessors are finished". Below these is a field for "Notify" with a value of "7" days and "0" Slack, set to "after Start Date".
- Assignment Finish Overdue Rule:** Contains three radio button options: "Do not notify", "Notify that a task should have finished" (selected), and "Notify only if predecessors are finished". Below these is a field for "Notify" with a value of "7" days and "0" Slack, set to "after Finish Date".
- Calendar, PalmPilot® & WorkPad® Notification Rule:** Includes a note "This will send task messages to your Notes mailbox which can be synced to your ToDo list" and three radio button options: "Do not notify" (selected), "Send Notification Once", and "Send Notification if Changed (requires ProjectGo mailbox agent)". Below this is a field for "Notify" with a value of "7" days and "0" Slack.

These rules can provide the participant with valuable reminders

A Participant may receive notifications if 1) they have a Notes mail address set in the form and 2) In the project profile document the "Allow ProjectGo! Notifications" field is set "Yes." Whether any notifications are actually sent is determined by the rule settings and the status of the project assignments.

Agent Name

The subject line of the message sent by an agent will be the agent name followed by "in Project" followed by the project name.

Initial greeting

This is the first text of the message sent by the agent. It can be any text that you want.

There are different situations that you may have your agent monitor. Each situation has an entry in the Agent Profile with an activation method selection and a time window.

Upcoming Assignment Rule

This rule will send a notification some amount of time prior to the planned start of an assignment.

Assignment Start Overdue Rule

This rule will send a notification some amount of time after the planned start of the assignment if the assignment is not marked as actually started by that time.

Assignment Finish Overdue Rule

This rule will send a notification some amount of time after the planned finish date of an assignment if the assignment is not marked as actually finished by that time.

Calendar/PalmPilot & WorkPad Notification Rule

This enables the sending of email to your Notes mailbox for all upcoming assignments. These tasks appear in the "Tasks" section of your Notes mailbox. These tasks will be synched to the Todo list in your PalmPilot® or IBM Workpad® using the software provided by Lotus. The parameter sets the time range into the future for which messages will be sent. Note: Marin Research provides an agent designed to be run in your mailbox that will recognize updated tasks and eliminate duplicates. If you have installed this agent, they you should use the "if Changed" option. If not, you should only use the "Send once" option.

Rule Options

For each of the rules, there are three choices.

Selecting the first choice, **Do not Notify**, will disable that rule.

Selecting the middle choice will enable the rule; your agent will send you a message for any assignment that meets the specified criteria.

Selecting the third choice, **Notify only if predecessors are complete**, will enable the rule, but your agent will not send you a message until all of the prerequisite assignments (defined as predecessors in the project management system) are completed.

For example, if the assignment "Write First Draft" is a predecessor of the assignment "Review First Draft", then selecting the third option would tell the agent not to send a message about the "Review First Draft" assignment until it both met the date criteria and the "Write First Draft" assignment was completed. If an assignment does not have any predecessors, then the "Notify only if predecessors are complete" rule would behave the same as the middle choice.

Activation Time Window

For each of the rules, you specify a date threshold by providing two numbers: a number of days and a percentage of slack. Slack is calculated from data generated by the project management system and reflects how much the project management system thinks this assignment can be delayed without slipping the schedule. (If you do not know or care about slack, then setting the percentage of slack to zero (the default) results in slack being ignored.)

For example, if you have an assignment that is scheduled to start (planned start field in the assignment document) at 9:00 on November 15, 1995 and scheduled to finish at 17:00 on the 21st.:

If the Upcoming Assignment rule were set to "Notify that a task is upcoming" with 7 days and 0% slack, then your agent would send a message the next time it ran after 9:00 on November 8th. If the Upcoming Assignment rule were set to "Notify only if predecessors are finished" with 7 days and 0% slack, and all the predecessors were finished prior to November 8th, then your agent would send a message the next time it ran after 9:00 on November 8th. However, if the last of the predecessor documents was marked completed at 10:00 on November 11th, then the agent would send a message the next time it ran after 10:00 on the 11th.

If the Assignment Finish Overdue rule were set to 1 day, then if the assignment was not marked as complete an agent would send a message the first time it ran after 17:00 on the 16th.

The Participants Navigator displays the Participant Profile view and provides convenient access to a variety of related information.

From this navigator you can create and modify participant profiles, organizations, and teams. Organizations are discussed in the chapter "Programs and Organizations." Teams are discussed in the chapter "Using Repository Center."

Actions Available on Participant Profiles

Assignment

The assignment action will create a new assignment with the current participant name preselected.

Status

The status action will create a new participant Status Report form with the participant name preselected.

Timesheet

The timesheet action will open any existing unfinished timesheet for this participant if there is one, or it will create a new timesheet for the current time period (this week), or it will create a new timesheet for the next time period if the current period timesheet is already posted.

If the existing timesheet was created in the other client, then a message will appear telling you to edit it with the other client.

Schedule

From	To	Activity
11/19/2001	11/26/2001	Travel to San Diego

This will display the *schedule info* form for the participant. Any events you put on this form will be considered to be non-work time. Schedule Info is used to record these absences (whether for vacation or business purposes) so that they can be shown on Todo calendars for projects and organizations that include you.

See the chapter "Using Todo and Schedule Info" for more information.

Todo

Calendar for Davidson James For 11/1/01 to 11/30/01						
Sunday, 4 November	Monday, 5 November	Tuesday, 6 November	Wednesday, 7 November	Thursday, 8 November	Friday, 9 November	Saturday, 10 November
		<input checked="" type="checkbox"/> DOCUMENT (Network Analysis) MISSING FOR (Davidson James) <input checked="" type="checkbox"/> DOCUMENT (Customer Release) MISSING FOR (Davidson James)				
					<input type="checkbox"/> KeyEvent LATE Develop Performance Analysis Tool (Davidson James)	
<input checked="" type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input checked="" type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input checked="" type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input type="checkbox"/> Holiday Davidson James (Travel to San Diego)
<input checked="" type="checkbox"/> Holiday Davidson James (Travel to San Diego)	<input type="checkbox"/> Holiday Davidson James (Travel to San Diego)					

This will create a Todo report showing the calendar of actions involving this participant. In a Notes client, a dialog box is displayed listing options. In a web client, the Todo report is automatically generated with all options preselected. Note however, that there is a second option labeled Custom Todo Report, that will provide options selection for web users.

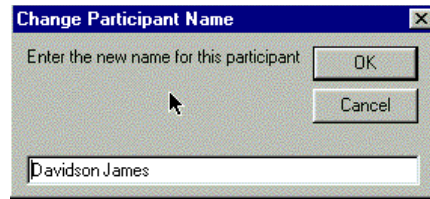
See the chapter "Using Todo and Schedule Info" for more information.

Note

This will create a Send Note form to send a message to the participant send to address or the user's journal. The message will contain a link to the participant profile document. See the chapter "Using Note and Journal" for more information.

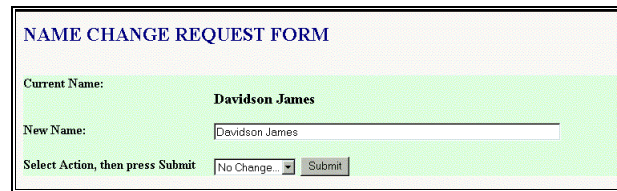
Identification

This will create a form to allow you to request a change in the identification of the participant.



A dialog box titled "Change Participant Name" with a close button (X) in the top right corner. The text inside says "Enter the new name for this participant". There are two buttons: "OK" and "Cancel". Below the text is a text input field containing "Davidson James".

Notes Identification Dialog



A web form titled "NAME CHANGE REQUEST FORM". It has a light green background. The form contains the following fields and controls:

- "Current Name:" followed by the text "Davidson James".
- "New Name:" followed by a text input field containing "Davidson James".
- "Select Action, then press Submit" followed by a dropdown menu showing "No Change..." and a "Submit" button.

Web Name Change transaction form

If you OK or Submit this change, a message will appear just below the participant name announcing that a change is pending. When the system agent runs, the name will be changed in every repository document including this participant profile. A permanent record of this name change will also be created to assist project managers when synchronizing existing projects that include this participant. If you enter a new name, then decide not to do so, simply display the Identification dialog again. It will always default to the current participant name. OK or Submit to clear the pending modification

Add to Locator(Web)

This adds the participant profile to your personal favorites list on the web repository locator page.

Reassignment Notifications - "Just in Time" staffing

When your project plans are assigned by skill or job classification, you will have participant profiles for each such skill. In these profile documents you should:

1. Set the Reassignment Required field to Yes
2. Enter the email address of the department head or supervisor responsible for assigning a real individual to each assignment of this skill
3. Set the Upcoming Assignment Rule to send a notice 7-14 days in advance of the assignment.

The ProjectGo! Agent will then email the supervisor a message indicating that the assignment is upcoming and that reassignment is required before work can begin.

Note: All notifications, both Participant and Management, generated from an assignment that uses a Reassignment Required resource will contain the reassignment indication.

The recipient of the Reassignment Required message should double click on the doclink to open the assignment and select a specific person to do the assignment using the selection listbox. This will place it on that persons "to-do" list and may cause ProjectGo! to send that person a message (depending upon their agent settings).

If another participant is selected whose profile indicates that reassignment is required, the chain of events will be restarted. Using multiple levels of reassignment allows a departmental manager to assign a work request to a particular team manager who then assigns it to a specific team member.

The Participant Profiles View

This view shows an alphabetical listing of all participants in the database. The following columns are displayed to help the administrator ensure that all records are properly initialized.

Organization

This displays the organization to which the participant is assigned. Multiple level organization codes contain backslashes.

UserID

This is the Notes UserID of the person associated with this participant profile. This provides security access to assignments for this participant.

Timesheets

This shows how timesheets are setup for this participant. The normal setting is "by User". This is set in the Timesheet Initiation field.

Reassign

This indicates whether reassignment is required for assignments of this participant (used when work is assigned to skill codes rather than real people).

Notify

This column displays a green ball if the Participant agent profile is properly set up for ProjectGo! Agent operation. It shows a slash circle if the send to address missing or if there none of the notification rules are selected.

Send Messages To

This column displays the email address associated with this participant. It will usually be the same as the UserID.

Alternate Name

When some project scheduling systems are used (such as Project Workbench and Primavera P3), Project Gateway will use one participant name for display and retain another code name for synchronization. This code name is shown here.

Other Participant Oriented Views

- **Profiles** - shows the list of participants defined in this database.
- **Key Events** - shows just the key event assignments grouped by organization and participant. This is shown in both list and calendar formats.
- **Reassignments** - shows all assignments that were previously assigned to a different participant grouped by organization and participant. Any assignment can be reassigned by putting the assignment document in Edit mode and reselecting the participant from the pull down list.
- **Status Reports** - shows all participant status report documents.
- **Timesheets views**
- **Workload** forecast and time summary views.

Participant Status Reports

A Participant Status report is a form used to record the current accomplishments of a person, either in whole, or in the context of a single project.

Participant Status Reports are created using the Status action on the participant profile form, or using the "Create a Participant Status Report" link that appears on the response page of a submitted web timesheet.

Participant Status Report

Participant: Davidson James

Title: Status Report

Author: Gary M. Cole/MarinResearch

Dated: 11/25/2001 05:53:11 PM Last Modified on: 11/25/2001 05:53:11 PM

For Project: [Optional - Select project name if reporting for a specific project, otherwise select [ALL]]

Report:

Activities and Achievements:

Planned for Next Week:

Problems and Concerns:

Document Access and Edit Log

A new Participant Status Report in a Notes Client

Participant Name

Select the participant from the list provided if not preselected.

Title

This will be defaulted to "Status Report". You may change this to be more specific as needed.

Author

This will be preset with the name of the person composing the report.

Dated

This will be preset with the date that the report is created, but can be changed if the report is for a specific prior period (such as a month end).

For Project

If this is a complete report for the participant, then it should be set to ALL. Otherwise, create separate reports for each project and select the project name from the list provided.

Participant Status Report Home StatusReports

Participant: Davidson James

Title: Status Report

Author: Anonymous

Dated: 11/25/2001 05:56:20 PM Last Modified on: 11/25/2001 05:56:20 PM

For Project: [ALL]
(Optional. Select project name if reporting for a specific project, otherwise select [ALL].)

Report:

Activities and Achievements:

Planned for Next Week:

Problems and Concerns:

New Report in a Web Browser. The entire form is not shown

Report

This is the primary statement of your situation.

Activities and Achievements

This is a list of what you have done since the last report.

Planned for Next Week

This is a list of your short term objectives. (In some cases this will be for more than a week.)

Problems and Concerns

This is a list of problems that you are facing. Note that, if these are project specific concerns, they should be raised as issues.