



Axosoft University

OT-203: Collaborating in OnTime: Project Wiki & Emails



Overview

Project Wiki

Project Wiki Tips

Creating Project Wiki Pages

Editing Project Wiki Pages

Project Attachments

Table of Contents

Email Transactions in OnTime

Four Types of E-mail Transactions in OnTime

Sending E-mails

Receiving E-mails

E-mail Queue Service

Things to Remember

Overview

Communication with your team can come in many different forms. OnTime 2009 helps facilitate two distinct ways to communicate with your team members: project wiki and e-mail.

Project Wiki

OnTime's project wiki isn't intended to completely eliminate other communication tools. Its purpose is to give you and your team one place to keep project-related documentation, ideas, forms, etc.

For example, instead of emailing a document to your team, you could create it directly in OnTime's Project Wiki. Team members can work together to build a better document, or, at the very least, always have quick access to the latest version.

Project Wiki Tips

Creating Project Wiki Pages

The project where the project wiki page is created is where the page will reside. Think of the folders in your hierarchy as buckets that each hold one or many HTML pages. Try to arrange the project folders in such a way to keep them more easily organized.

Editing Project Wiki Pages

Modifying pages in the Project Wiki is a snap. Remember to add different fonts of text, tables, images, links to web pages, and links to other OnTime Project Wiki pages.

Table of Contents

Don't forget about the dynamic Table of Contents that automatically displays all Project Wiki pages in one organized list!

Project Attachments

Files can be attached to defects, features, tasks, and incidents—but they can also be tied to projects. This is very useful at the beginning of projects when files exist but don't have anything but a "project" for them yet.

Email Transactions in OnTime

Four Types of E-mail Transactions in OnTime

Communication with customers or employees is an important part of your business. OnTime helps with this by managing e-mail traffic. The way e-mails are handled falls into four main categories:

OT-203

Collaborating in OnTime: Project Wiki & Emails

E-mail Notifications

These e-mails are data dropped into an e-mail automatically by the system and sent to the appropriate recipients. These notifications could be generated as a rule created against a workflow step, a project, or an individual item.

E-mail Alerts

The Alerts are sent by a trigger that an OnTime user would create. There are two ways that an alert could be triggered. One way to trigger an alert would be when a certain field changes value, and the other way would be to assign a filter to the alert trigger.

E-mail Conversations

These are either e-mails sent from the system by an OnTime user, or an e-mail sent to the system with an appropriate ID number in the subject line.

New Item Creation

When e-mails are sent to the system without a matching ID number in the subject line, a new item (defect, feature or task) is created from the e-mail.

Sending E-mails

Configuring your system to send e-mails can be done by accessing the “E-mail Notifications” menu under “Tools” through either OT 2009 Windows or Web. The “Mail Server Configuration” section is what you need to populate with the proper settings.

Receiving E-mails

In order for your database to properly receive e-mails, you will need to:

- Create one or many POP e-mail accounts that will receive OnTime e-mails
- Install the OnTime E-mail Service
- Configure the service with your e-mail accounts

E-mail Queue Service

The Email queue service is designed to allow users to queue up email notifications automatically in the OnTime database. The queued up email notifications are then picked up by the OnTime application and relayed over to the SMTP server for delivery. The Email service queue option is located under the OnTime E-mail notifications window under; Tools > Email Notifications.

Things to Remember

Remember these important tips when setting up your OnTime e-mail environment:

- E-mail accounts are tied to object type (defect, feature, task, and incident)
- It is suggested to send new items that are created to a unique project folder
- Use multiple e-mail accounts if you need e-mails routed to different places in your database



OnTime 2009

Ship Software OnTime



Call for More Information

Within the U.S

(800) 653-0024

International

+1 (480) 362-1900

Visit us Online

Home

www.axosoft.com/products/services.aspx

Store

<https://store.axosoft.com>

Web Site Guide

Schedule a Demo:

Products > OnTime 2009 > Schedule a Demo

Video Overviews & Tutorials:

Download or Host > Media Center

Community – Forums, Blogs, Customer Portal:

Community

Axosoft is passionate about: building superior customer relationships, creating software that continues to lead our industry, offering tremendous value for our customers, and developing a product that inspires our employees.