



Using Teamwork by e-mail



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1.1 Introduction

Teamwork has a rich set of features to facilitate e-mail interaction, which go beyond the (quite powerful by itself) subscription/notification engine on tasks and issues,

In this overview we'll see:

- 1.3 Actions by e-mail
- 1.4 Subscriptions
- 1.5 Agenda/calendar synchronization with Outlook and iCalendar clients
- 1.6 Send message
- 1.7 Multiple e-mail, e.g. SMS forwarding

There are software packages that do just this; Teamwork does this *in context*, automatically integrating security checks and project links.

This documents presents in more detail what is presented in

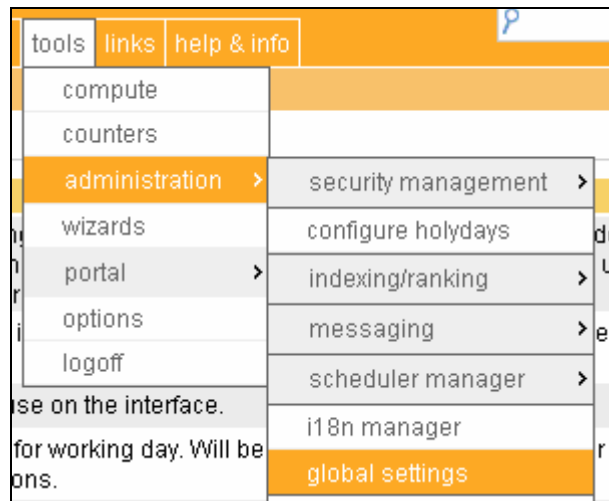
<http://www.twproject.com/various.page>

in the “manage by e-mail” video.

1.2 Configuration

E-mail flow can go in two directions: *from Teamwork to the users*, and *from users to Teamwork*. Different configurations are needed for the two directions; you may activate one and not the other, at your choice. Of course having both directions, is the ideal situation.

For all configurations, log in with administrator rights and go to tools -> administration -> global settings



1.2.1 Configuration of e-mail from Teamwork to users

This is quite simple, as it amounts to configuring “send e-mail” from the server where Teamwork is installed. This consists in setting an SMTP server, and an e-mail from which e-mails will be sent. These two parameters are all is generally needed to set up send e-mail from Teamwork.

Mail			
application e-mail	<input type="text" value="info@twproject.com"/>	teamworkmail@yourdomain.com	This address will be used to send messages, if SMTP is configured. If POP3 is configured, this is the e-mail address corresponding to the POP3 account. In order to send messages by mail, and receive email notifications, this must be set.
server SMTP	<input type="text" value="smtp.MY_DOMAIN.com"/>	smtp.yourserver.com	In order to send messages by mail, and receive email notifications, this must be set. After having saved a new value, you may test it. Warn: it may take some time: click to test server
mail smtp port	<input type="text" value="25"/>	25	If left empty, the standard port (25) will be used.

In case you use “authenticated SMTP”, a bit more parameters may be needed:

use authenticated SMTP	<input type="checkbox"/>
mail SMTP user	<input type="text"/>
mail SMTP password	<input type="password"/>



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All configurations are extensively commented on the interface.

This done, users will receive e-mail **only if** they have an e-mail address set on their profile:

name	<input type="text" value="Aaron"/>	surname*	<input type="text" value="Arrosti O'Hara"/>
resource of	<input type="text"/>	area	<input type="text" value="Production"/>
office			
<input type="text" value="66, Radnor Road"/>		city	<input type="text" value="Twickenham"/>
<input type="text" value=""/>	zip	nation	<input type="text" value="GB"/>
<input type="text" value="0033 1 434343434"/>		fax	<input type="text"/>
<input type="text" value="333 42342342342"/>		email	<input type="text" value="aohara@MY_DOMAIN.com"/>

1.2.2 Configuration of e-mail from users to Teamwork

In this direction, you have to create a new e-mail account, which will be used (exclusively) by Teamwork: Teamwork will connect to such account, and download and parse e-mail, just like your local e-mail client does.

pop3 host	<input type="text" value="pop3.MY_DOMAIN.com"/>	pop3.yourserver.com	In order to enable Teamwork to receive messages by mail, this must be set. After having saved a new value, you may test it. Warn: it may take some time: click to test server
pop3 user	<input type="text" value="teamworkNewUser"/>		In order to enable Teamwork to receive messages by mail, this must be set.
pop3 password	<input type="text" value="putherethepassword"/>		In order to enable Teamwork to receive messages by mail, this must be set.

All configurations are extensively commented on the interface, which on save will also test the accessibility of the e-mail account.

1.3 Actions by e-mail

There are some simple actions that can be done in Teamwork simply by sending e-mail to Teamwork. This can be practical, for example in cases where the web interface is not accessible, or when sending e-mail to someone and in copy to Teamwork.



Using Teamwork by e-mail

In order for this functionality to work, 1.2.2 *Configuration of e-mail from users to Teamwork* is necessary.

Teamwork in receiving the e-mail will check that the sender has the right to do the action intended: *there must be one and only one resource having as e-mail the one which you are using to send the message*. This way Teamwork will recover the resource and check security rights.

The possible actions are now detailed.

1.3.1 Adding documents to tasks

You can send an e-mail to Teamwork with documents attached, and all the attachments will be added as documents on the task intended. In this and the 1.3.2. case below, the task on which you intend to operate via e-mail is identified in the following way:

the subject of the e-mail you are sending is parsed, and if it starts with TASK, what is between # # is considered, say it is A342; first a task with code A342 is searched; then, if the value is numeric, say 342, a task with database id 342 is searched; lastly, a task named A342 is searched.

If at least one of the cases above the task is found, the documents are created.

The screenshot shows the Teamwork web interface. At the top, there is a navigation bar with the 'teamwork' logo and several menu items: edit, projects, issues, resources, documents, team, tools, links, and help & info. Below this, the current page is identified as 'projects / Dorito'. There are several tabs: general, assignment:2, subtask:5, issues:2/2, dependencies:0, documents:1 (which is selected), subscriptions, and costs. Below the tabs, there are two checkboxes: 'show versions' and 'show children'. A table with a yellow header is displayed, with columns 'ed.', 'code/short name', and 'name'. The table contains one row with a document icon, a right-pointing arrow, and the text '521 - Dorito_SNAPSHOT 27/03/2008-16:06:38'. At the bottom left, there is a small icon of an envelope and a text box that says: 'You can add documents to this task by sending an e-mail to test@open-lab.com with attachments and as subject: TASK #521# ATTACHMENT'.

1.3.2 Adding issues to tasks

You can send an e-mail to Teamwork where the text of the e-mail will be used as description of a newly created issue on the task intended. If there are up to two

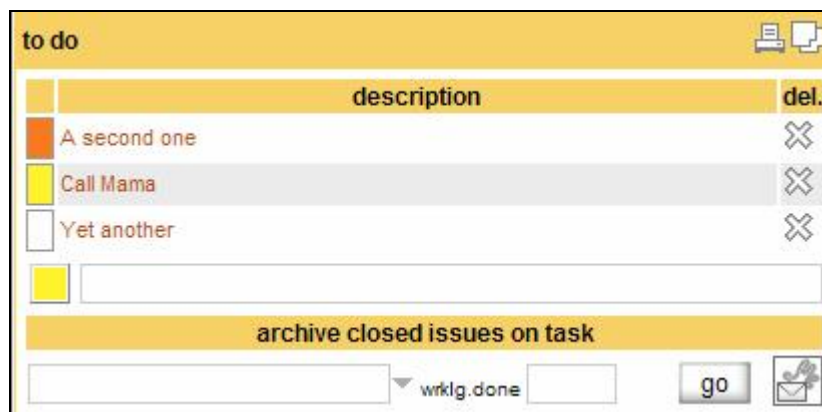


documents attached, these will be attached to the issue. The priority is taken into account to set the priority of the issue.



1.3.3 Creating to-do's

This supposes that you have added the “to do” web part to your home page, in order to see the effects of your actions: just click on the e-mail icon to add the todo via e-mail (yes, this makes sense for to bookmark it, not to it when you have the web interface available):



1.4 Subscriptions

In order for this functionality to work through e-mail, *1.2.1 Configuration of e-mail from Teamwork to users* is necessary.



This functionality is covered in the page

<http://www.twproject.com/assignments.page>

1.5 Agenda/calendar synchronization with Outlook and iCalendar clients

Teamwork's agenda can be integrated with external clients, in particular with Microsoft' Outlook.

In order for appointments to be sent from Teamwork to e-mail clients, *1.2.1 Configuration of e-mail from Teamwork to users* is necessary

In order for appointments to be sent from e-mail clients to Teamwork, *1.2.2 Configuration of e-mail from users to Teamwork* is necessary.

For an introduction, see the new agenda videos at

<http://www.twproject.com/agenda.page>

A technical description can be found at

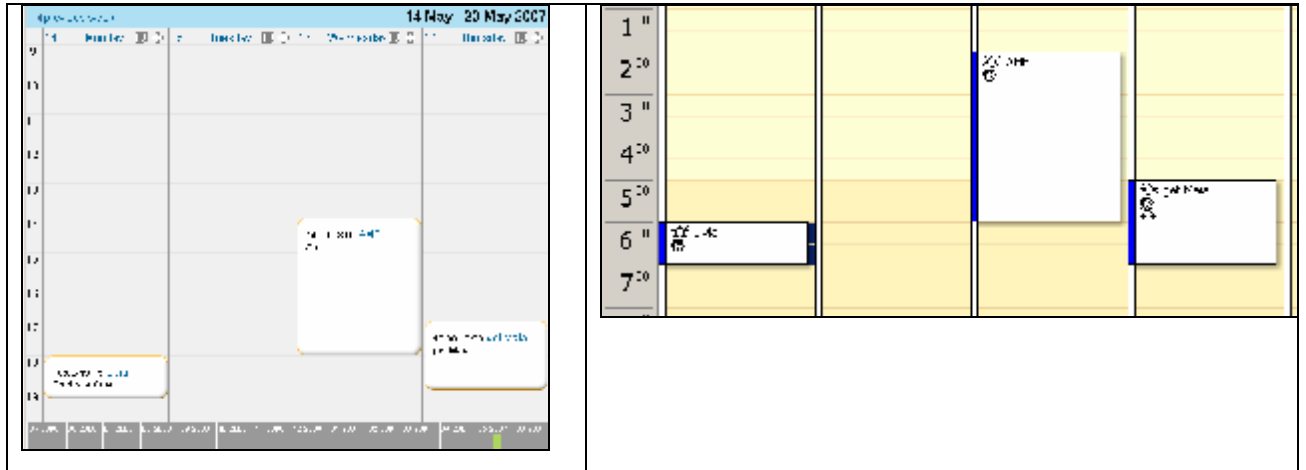
<http://www.twproject.com/icalendar.page>

Microsoft Outlook 2000, 2003, 2007, Apple Email are supported.

You can get a perfect symmetry in Teamwork and Outlook:



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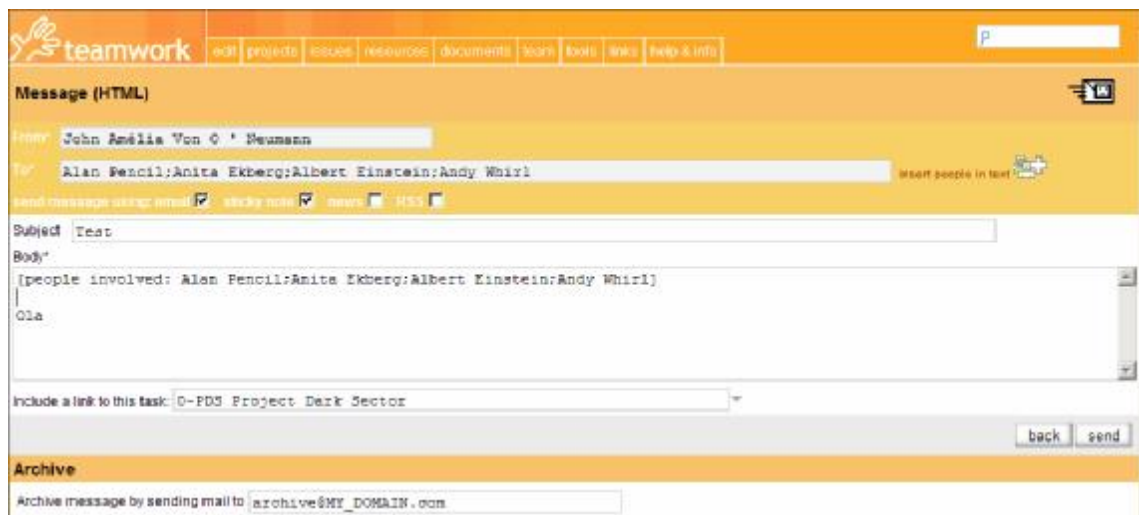


See also:

<http://twproject.blogspot.com/2007/04/integrate-your-java-agenda-and-ical.html>

1.6 Send message

In order for this functionality to work through e-mail, *1.2.1 Configuration of e-mail from Teamwork to users* is necessary.



1.7 Multiple e-mail, e.g. SMS forwarding



Using Teamwork by e-mail

In order for this functionality to work, *1.2.1 Configuration of e-mail from Teamwork to users* is necessary.

email	first@a_b.com;mysms@a_b.com
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Multiple entries can be set on an e-mail field; so for example, a secondary SMS-forwarded notification e-mail can be set on the anagraphical data e-mail field. E-mail addresses get collected for notification also if written in different anagraphical data entries.