



# **Natar Project@Hand 2 MSP**

Project Management Application for the Palm Computing Platform

## **User Manual**

## **Natara Software, Inc.**

909 E. Ogden Ave., Suite C  
Naperville, IL 60563

<http://www.natara.com>

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# 1 Introduction to Project@Hand 2 MSP



Welcome to Project@Hand 2 MSP by Natarara Software Inc. Project@Hand 2 MSP is a Windows desktop product which allows users to synchronize Microsoft Project (.mpp) files with the Natarara Project@Hand 2 software on a mobile devices such as those that run the Palm operating system.

Project managers who use Microsoft Project will welcome the true one-step synchronization of Project@Hand 2 MSP. Once desktop project files are identified to Project@Hand, updates made to the projects on the desktop and handheld will be reconciled during each synchronization.

## Key Features:

- One-step synchronization with Microsoft Project.
- Advanced scheduling engine.
- Organize your project using a hierarchical task list.
- Integrated Gantt chart.
- Project, task and resource lists are fully customizable.
- Supports high resolution devices.
- Supports devices with virtual graffiti areas.
- Save projects on storage cards to free up memory.
- Define and save multiple filters.
- Beam projects to other handheld devices.
- Print task information using TealPrint or PalmPrint.

## 1.1 Installation

These are the basic steps to install Project@Hand 2 MSP on your computer:

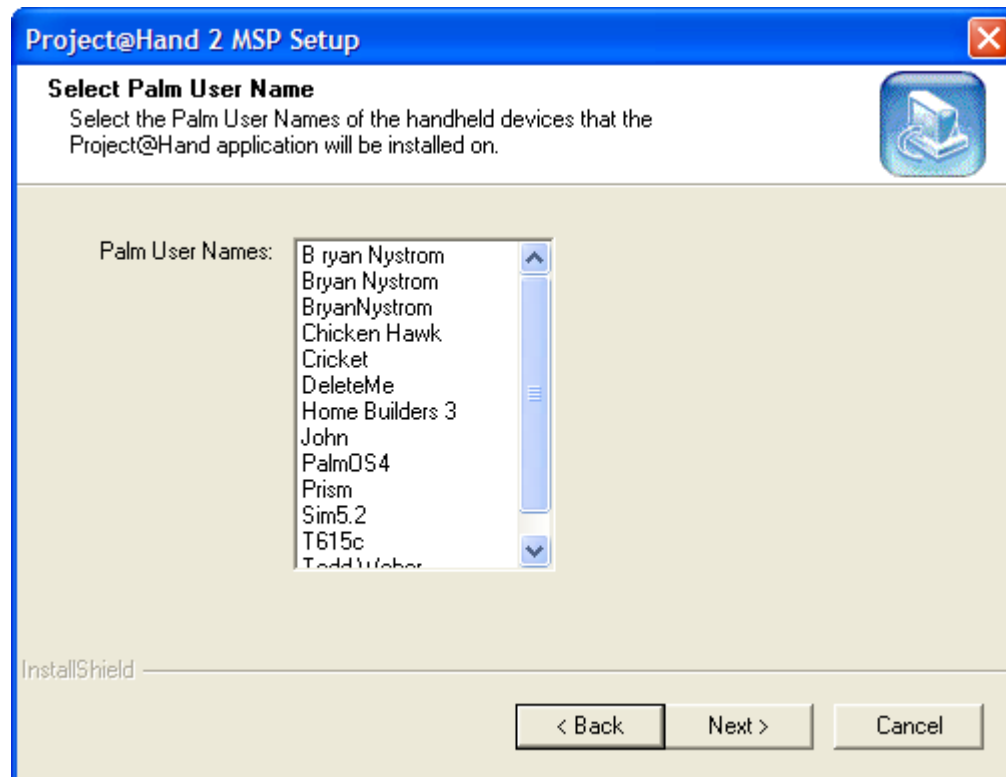
Once you download the setup file, locate it in your windows folder or desktop and double click the

icon.

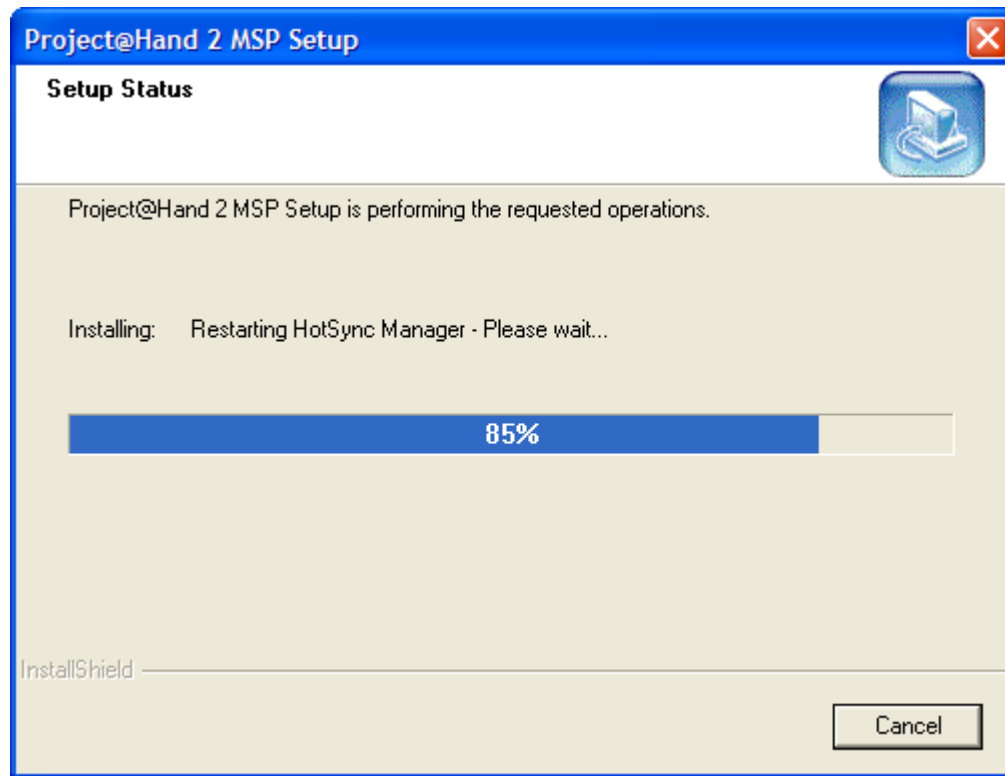


Follow the steps provided in the setup process.

You will be prompted to select a handheld to install. Select none, one, or several handhelds to have the Palm application installed on.



In order for the Project@Hand 2 MSP conduit to be installed, the setup program will request that HotSync Manager exit and restart. Depending on your system, this may take several minutes to perform. It is also possible that HotSync Manager will refuse to quit or restart. In that case you are warned of the situation and may need to manually restart HotSync Manager.



Please be ware that when this screen is up, it will take some time. Do not abort at this point and assume that the install is not working. It is. Unless this dialog is stuck on your screen for an unusually long amount of time (say 5 minutes), give it time to complete.

When the setup is complete, do a hotsync with the device(s) in order to have HotSync Manager install the Project@Hand 2 .prc file onto the device.

You can then run the Project@Hand 2 MSP configuration application by going to your windows:

**Start->Programs->Natará Software**

and selecting the "Project@Hand 2 MSP" item from the menu.



Please check the readme.txt file that accompanies each download for any further setup and installation instructions. This is usually kept up to date more often than the user manuals.

## 1.2 Uninstalling

Use the Windows control panel item "Add-Remove Programs" to uninstall Project@Hand 2 MSP from your desktop.

If you wish to uninstall the product from your handheld, use the default Palm Launcher menu item "App->Delete" (/D) to locate and delete the "Proj@Hand" entry. Please refer to the user manual for the Project@Hand 2 palm app.

## 1.3 Purchase a License

You can purchase a license for Project@Hand 2 MSP from the Natara Software website at <http://www.natara.com/projectathand2/purchase.cfm>.

After purchasing a Project@Hand license, you will receive a registration number by email (usually within 12 hours). Follow the instructions in the email to enter your registration number in the [registration number dialog](#).

### Lost Registration Numbers

If you misplace your registration number or have not gotten your registration after 12 hours of registering, visit the Natara web site <http://www.natara.com/Support.cfm> to request your registration number or see if it has been posted yet.



Due to the high amount of internet email spam, our registration emails are sometimes marked by various spam filters as spam. This can prevent our emails from getting to you. By visiting the support site mentioned above, you can verify if your registration code has been processed. You can also change the email address that your notifications are sent to and avoid email servers that block our emails.



Natara **DOES NOT** recommend using free email servers such as Hotmail or Yahoo due to the high number of dropped emails on those systems. If you use them, please check with our support site mentioned above prior to contacting Natara to verify if your registration has been processed.



Also note that Natara **WILL NOT** respond to challenge/response email verification system. Our registration process is automated.

## 1.4 What's New

v2.5.1 of Project@Hand 2 MSP is the initial release of this generation of our product.

## 1.5 Requirements and Limitatinos

### 1.5.1 Requirements

#### User

- The user should be familiar with general project management terminology and techniques along with a basic knowledge and understanding of using Microsoft Project.

#### Desktop

- Microsoft Project 98\* or later.
- Windows 2000 or Windows XP.
- HotSync Manager version 4.0 or later.
- Microsoft XML Services (MSXML). This component is installed with current versions of Microsoft Internet Explorer.
- 10 MB disk space.
- Read/Write privileges to installation directory.

#### Handheld

- Palm OS 3.5 or greater.
- Approximately 350k free memory for the application.
- Palm OS 4.0 or greater is required to beam projects.
- PalmOne Tungsten T3 requires [T3 DIA Compatibility PRC's](#) for 320x480 support.

(Refer to the Project@Hand 2 user manual for additional requirements)

*\* Microsoft Project 98 does not support all the features that Project@Hand 2 MSP does with later releases of MSP, therefore some features found on the handheld do not directly translate back to the desktop.*

### 1.5.2 Limitations

- A Project files can only be synchronized with a single desktop computer. There is no support for updating the same project file on multiple desktops. Project@Hand 2 MSP is not a means to keep the same project file up to date on multiple desktops.
- There is no support for synchronizing ODBC based project files as there was in earlier versions.
- Only a subset of project fields and capabilities is synchronized to the handheld. For example:
  - No support for WBS
  - No support for resource specific calendars
  - No support for sub-projects (sub-projects should be configured to synchronize individually)
  - No support for resource leveling (on the handheld)
  - No support for synchronizing custom fields
- On the handheld, deadline, and resource material type fields are not relevant when synchronizing with MSP 98.
- Priority is different between the handheld and the desktop project when synchronizing with MSP

98.

## 1.6 Software License Agreement (EULA)

### -IMPORTANT-

Read This Carefully Before Installing The Software

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## 2 Configuration User Interface

This section discusses the various tabs, buttons, toolbars, and fields of the Project@Hand 2 MSP Configuration user interface. The user interface is mainly divided amongst three tabs

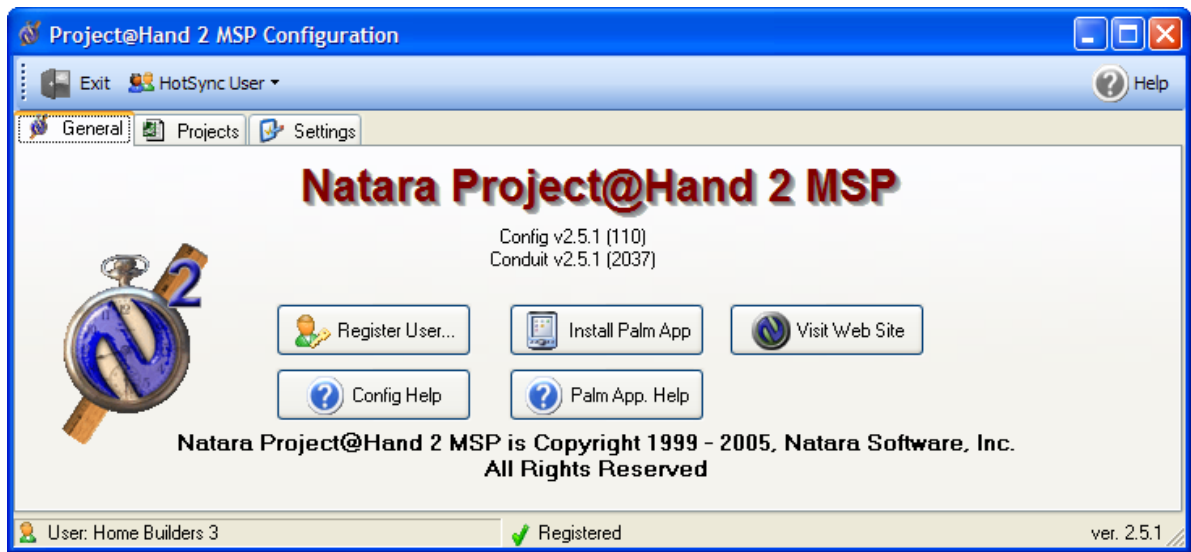


- [General Tab](#)
- [Projects Tab](#)
- [Settings Tab](#)

The main toolbar and status bar are discussed in the [General Tab section](#).

### 2.1 General Tab

This is the "General" tab of the configuration dialog.



### Buttons:


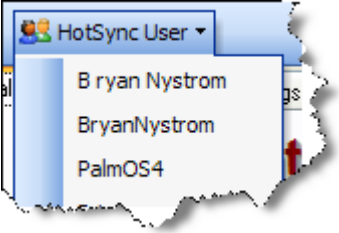

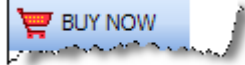
Buttons	Description
Register Users...	This button takes you to the <a href="#">dialog</a> which allows you to enter the registration code for individual users.
Config Help	This will bring up Project@Hand 2 MSP Config help file (this document)
Install Palm App	This will bring up the Palm Install tool for installing the Project@Hand 2 application onto a device.
Palm App Help	This will bring up the Project@Hand 2 help file describing the functions and features of the Palm application
Visit Web Site	This will launch your standard browser and take you to the Natar web site.

**Versions:** This tab also shows you the version of the product you are using. Directly under the large "Project@Hand" label on the display you will see the version number of the configuration application itself, and under that is listed the install version of the conduit. In the example above, both are at version 2.5.1. Minimally, the first 2 numbers should be the same (v2.5). If they are not, it is recommended you check to see if you have the latest version of the product.

The version number of the configuration application is also shown in the status bar at the lower right of the window.

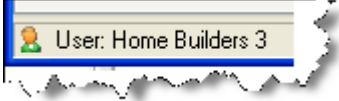
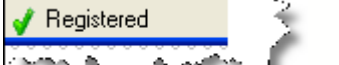

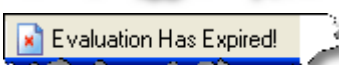
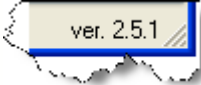
### Toolbar buttons:

(These buttons are common across all three tabs)

Button	Description
	<p>This button exits the configuration program and saves all settings. You can also exit the program by pressing the close button in the title bar</p>
	<p>Selecting this toolbar item presents a drop down list that has all the hotsync users defined on this desktop. Select the user that matches the Palm Hotsync user name on the device that you hotsync with. Changing the current hotsync user also changes the list of projects associated with this device on the <a href="#">Projects Tab</a></p>
	<p>Selecting this toolbar button will bring up the help file for the Configuration app.</p>
	<p>This button is only visible when you are viewing a user that has not yet been registered for this application. Selecting it will launch your default browser and take you to online information about purchasing a license.</p>

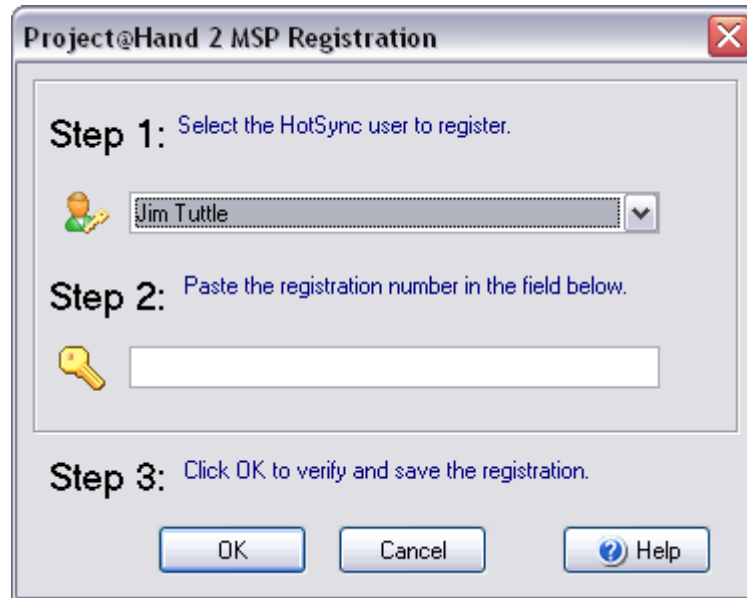
**Status Bar items**

(These items are common across all three tabs)

Item	Description
	<p>The first section in the status bar (lower left) indicates which hotsync user is the current one that Configuration is setting up and displaying projects for.</p>
  	<p>The next section provides information about the registration status of the currently selected user. It either indicates that</p> <ul style="list-style-type: none"> <li>• the current user has a valid registration</li> <li>• is currently evaluating and the number of days left in the evaluation period</li> <li>• or that the evaluation period has expired for this user (no further synchronizations will occur with this device)</li> </ul>
	<p>The last panel in the status bar indicates the current version of the Project@Hand 2 MSP configuration application. In this case, it is version 2.5.1</p>

### 2.1.1 Registration Dialog

The registration dialog allows you to register your copy of Project@Hand 2 MSP.



**Register Dialog**

Once you have [purchased a license](#) to use Project@Hand 2 MSP, you can enter the registration number here..

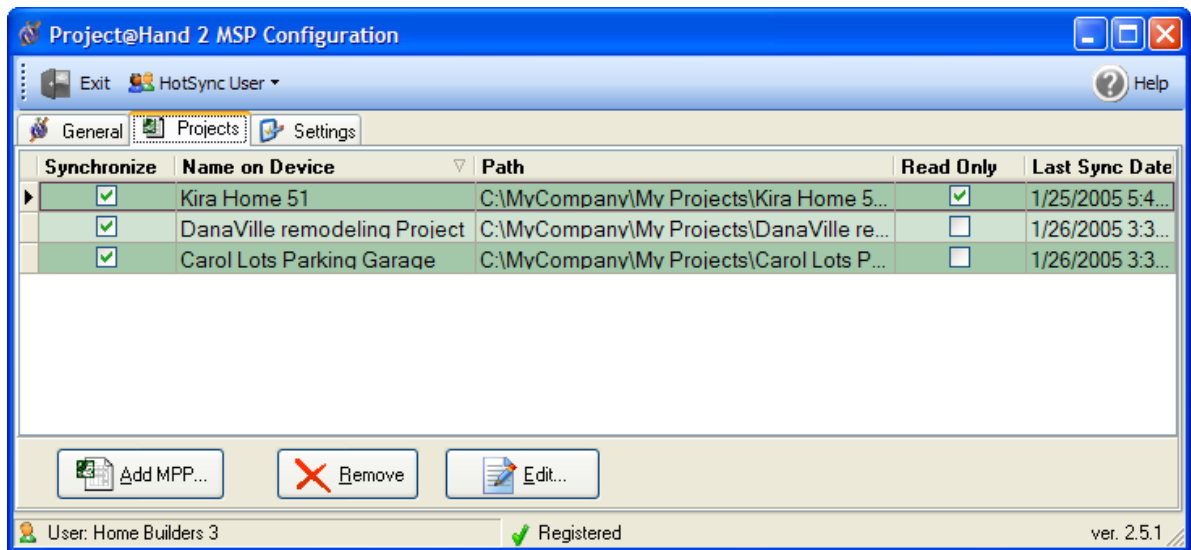
1. From the drop down menu, select the hotsync user you have purchased a registration number for.
2. Paste the number provided in your registration email into the box provided.
3. Select the "OK" button to save the registration.



Project@Hand 2 MSP registration numbers begin with **037-**. We recommend that you copy and paste the number directly from the registration email sent from Natara Software. This avoids problems with correctly identifying the digit zero and the letter O, digit five and the letter S, and digit one and the letter 'L'.

## 2.2 Projects Tab

This is the "Projects" tab of the configuration application. From here you can assign and configure the synchronization of Microsoft Project files to your device.



### Adding Projects

To add projects (.mpp files) to be synchronized with Project@Hand 2 on the device, simply do any of the following:

- Click the "Add MPP.." button. This will present you with a standard "Open" dialog box in which to navigate your hard disk to find and add any .mpp files you wish to sync with.
- Open a folder window on your desktop to the folder where your .mpp file(s) exist. Then simply drag and drop one or more .mpp files onto the Project@Hand 2 MSP Configuration window. This is the easiest way to add multiple projects at the same time.



Projects created on the handheld can also show up here if they are marked as "Synchronize with desktop". Refer to the user manual for the Palm app for more information.

### Removing Projects

To remove a project from the list of projects currently syncing with a device:

1. Select the project in the list of projects. There is an arrow in the far left side of the list indicating the currently selected project
2. Select the "Remove" button.

You will be prompted to indicate if you also wish to have the project file removed from the handheld when you next hotsync with it.



Removing a project only removes it from the list. It does not delete the .mpp file from your computer. You must do this manually if you wish it removed off of your hard disk.

### Edit Project Setting

You can change certain features of an individual project, such as if it should sync, it's location on your hard disk, and if you want to treat it as read only. Do this by selecting (click once) on the project in the list. An arrow appears in the far left column indicating the currently selected item. Then click the "Edit" button. The same can be achieved by double clicking on a project in the list. Doing either will take you to the [Edit dialog](#).

### Project list column definitions

This is a description of the various columns which displays the project files.

Column Name	Description
Synchronize	A check box that indicate if the project file is currently configured to synchronize with the device. If it is not checked, the project is skipped at sync time regardless of if changes have been made on the device or desktop. This is checked by default when adding new projects.
Name on Device	This is the name that is assigned to this project file as it appears on the device. Since there are different requirements for file naming, this name can sometimes differ from the how it is stored on the computer. It may also be different if you have multiple projects with the same baese name syncing to the same device (see the note below)base
Path	This shows the path on your computer to the file that is being synced. NOTE: If the path is displayed in <b>RED TEXT with a strike outline</b> , that is an indication that Config is unable to actually locate the .mpp file in that path. The file is either missing or the path no longer exists.
Read Only	A check box that indicates if the desktop project is treated as "Read Only". This means that changes from the handheld are ignored. It is similar to doing a "Desktop overwrites handheld" and a project by project basis. This is unchecked by default.
Last Sync Date	This column is an indication of the last time this project was known to have synced with the device. If it is a newly assigned project that has yet to be synchronized, then the column is blank.

You can customize the way the project list is displayed:

- Click and drag any column heading to a new position within the column
- Click and drag in between columns and move left and right to resize columns
- Click on a column header to sort by that column ascending or descending (click a second time)



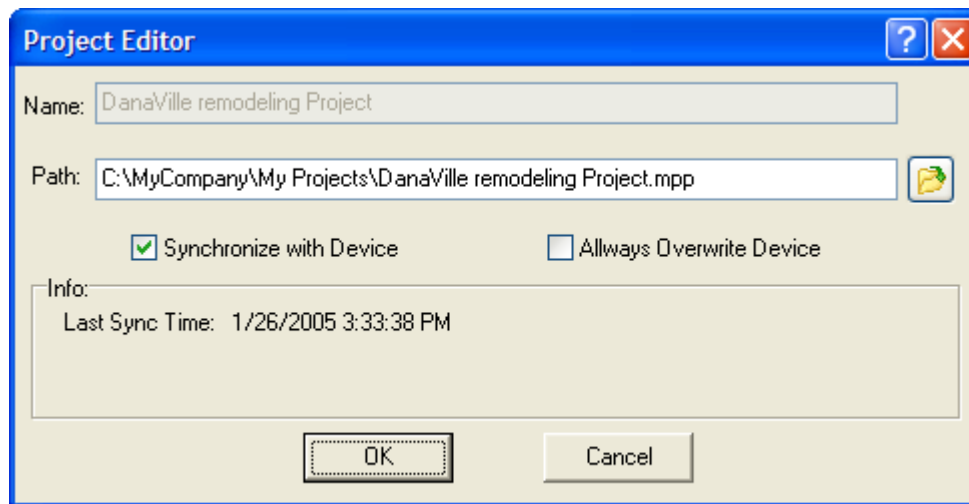
You are allowed to add multiple projects with the same base name from different folders on your computer. The first one added will retain the same base name if possible. Subsequent projects added with the same base name are made unique by appending an \_1 style postfix to the base name. So, you can add a project "C:\MyProject.mpp" to the list and it should have a "Name on Device" as "MyProject". If you then add another project of "C:\Work\Project1\MyProject.mpp", it will be added and assigned a name on the device as "MyProject\_1", and so on. You can not manually assign names with the configuration application.



You can not add the same project to the same user twice. Attempting to do so will just be ignored by the application.

## 2.2.1 Project Editor Dialog

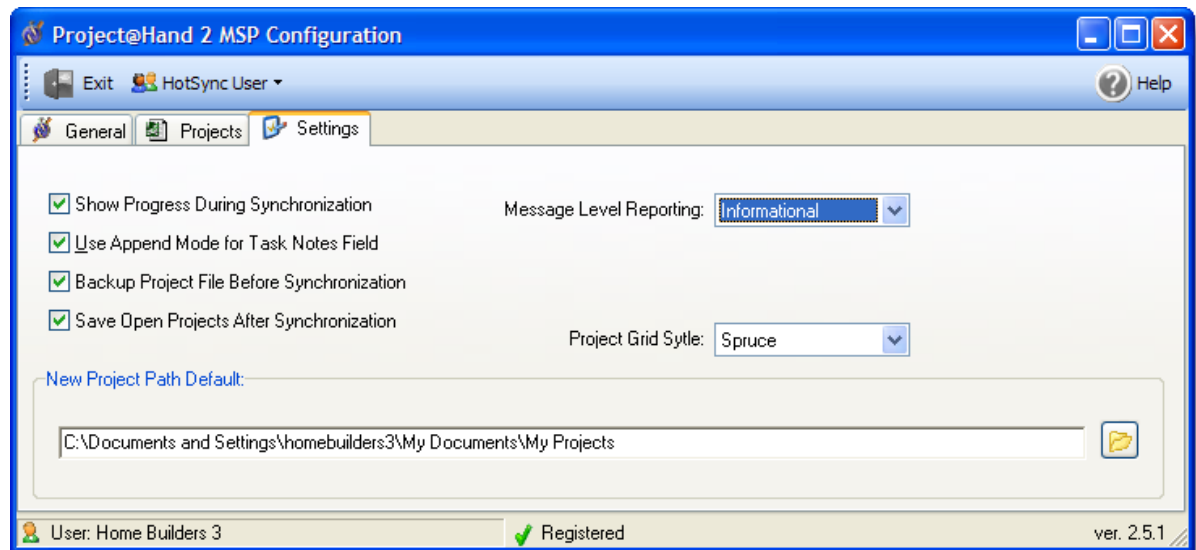
This is the dialog box you get when selecting the Edit button on the Projects page or double clicking on an individual project in the list.



Item	Description
Name:	Name of project as it should appear on the device (Not editable)
Path:	The path to the .mpp file. If you move the project to a different folder, use the button on the right to reassign the path to the .mpp file. NOTE: Changing this value will not physically move the .mpp file. You are required to do that from within windows itself.
Synchronize with Device	Check or uncheck this to enable or disable the synchronization of this particular .mpp file. This is useful to temporarily disable syncing of a project file when it is not in use. Doing so speeds up the hotsync process since the file does not have to be checked each time for changes. Check it again when you want to resume syncing with this particular .mpp filesynchronization
Always Overwrite Device	Checking this tell Project@Hand 2 MSP to treat the file as "Desktop Overwrites Handheld" each time. This means that no updates made on the handheld will make their way back into the desktop project. This is generally used when you want a project for reference only on the device. In some cases where multiple users need to reference the same project, but only certain people are allowed to make changes.
Info:	this box displays syncing information about the particular project.
Last Sync Time:	Currently, this is the only information available about the project sync status. It gives you a time stamp that indicates the last time the project was synchronized with the device.

## 2.3 Settings Tab

This tab presents you with global options that affect how Project@Hand 2 MSP operates. These settings are not saved on a per-user basis and apply to all users.



Item	Description
Show Progress During Synchronization	Having this option checked tells Project@Hand 2 MSP to display an informational progress box during each hotsync.
User Append Mode for Task Notes Field	Having this option checked means that changes to notes made on the handheld will be appended to any existing note on the desktop. Use this feature if you normally use Rich Text Formatting (bold, underline, etc.) in your project notes on the desktop. If you do not have this option checked, changes to notes on the handheld will replace the notes on the desktop side, and may loose any rich text formatting you have applied. If you normally do not use Rich Text formatting, then leave this box unchecked.
Backup Project File Before Synchronization	This will cause Project@Hand 2 MSP to make a backup copy of the desktop project file (.mpp) that it is about to synchronize. It does this back copying the .mpp file and adding an extension of .bak to it. If you find that something goes wrong with a hotsync, you can recover the project file to it's pre-sync state by renaming the .bak file.
Save Open Projects After Synchronization	This option will save any projects you have open in MS Project itself when a synchronization occurs. This saves to disk any changes made by the hotsync process. Otherwise, you will be prompted by MS Project itself to save the project when you close it or MS Project itself.
Message Level Reporting:	This setting allows you to change the error logging level that occurs at hotsync time. By default, it is set to "Informational". This logs both errors and informational text into the hotsync log. Setting it to "Errors Only" will only post issues if they are error types. The third setting, "Verbose" should only be used if advised by Natara support for the purpose of debugging. Leaving it set to "Verbose" will quickly fill up your hotsync log file.
Project Grid Style:	This setting is mainly cosmetic. It changes the color and font settings for the Project list in the <a href="#">Project Tab</a> . Set it to whatever pleases you.
New Project Path Default:	This setting indicates to Project@Hand 2 MSP where to create new project that originate from the handheld side. Change this if you wish new projects to be created somewhere else on your system. Changing this does not update the location of already synchronized files. Use the <a href="#">Project Edit dialog</a> to reset the location of

## 3 References

This section covers some miscellaneous topics, including

- [How to contact Natara Software](#)
- [Frequently Asked Questions](#)
- [Help for Project@Hand 2 handheld application](#)

Other forms of this document are available, including:

- A Windows help file
- An online HTML version

### 3.1 Contacting Natara

Questions, comments, or bug reports?

**Email:**

[support@natara.com](mailto:support@natara.com)

**Online:**

<http://www.natara.com>

**Natara User Forums:**

<http://www.natara.com/forums>

**Phone:**

(630) 579-0958 (9 am - 5 pm Central time M-F)

**Mail:**

909 E. Ogden Ave.  
Suite C  
Naperville, IL 60563-2885  
USA

**If you are having problems with our product or wish to report a bug, please first look in the following locations to see if we have already provided some help or the issue has already been reported by looking at the following locations:**

[The Natara Support Pages](#)

### [The Natara User Forums](#)

If you do not see an answer to your question and do not feel like posting in our forums, please feel free to email us.

**Note:** When reporting problems, be sure to be as specific as possible.

Include:

- Which Natara Software product you are having trouble with
- Palm OS version (3.1, 3.5, etc.)
- Palm Desktop version (HotSync version)
- What desktop operating system ( Windows 2000, XP, Windows ME, etc.)
- Steps to reproduce the problem.
- It is also **very useful** to provide a copy of your latest HotSync log file. That file usually contains error messages reported by the Project@Hand conduit during HotSync operations.

## 3.2 Frequently Asked Questions

This section cover some, but not all, of the questions we frequently get from our customers regarding Project@Hand. For more answers to common questions, please visit the [Natara Support page](#), the [Natara Users Groups](#), and the [appropriate product section on our web site](#).

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**Q: Can I install Project@Hand 2 (MSP) to evaluate without removing Project@Hand 1.5.**

A: Yes. The two products are considered separate from each other and do not interfere with each other. It is not recommended that you sync the same project file to both products. Use separate projects to evaluate Project@Hand 2 with.

**Q: Can I safely delete Project@Hand v1.5 from my handheld and desktop without interfering with my Project@Hand 2 setup.**

A: Yes, once again, the two products are not associated with each other. If you make decide to move up to Project@Hand 2 MSP, we recommend you fully remove Project@Hand 1.5 from your system.

**Q: I am attempting to delete Project@Hand 1.5 from my device, but the "Delete" feature is showing to "Proj@Hand" files. Which is the correct one to delete.**

A: The "Delete" feature in the standard Palm launcher has the ability to display the version number

or size of the application along with the name. Use this to determine the older Project@Hand 1.5. It will have a lower version number, and it will be much smaller than the more advanced Project@Hand 2.

**Q: What versions of Microsoft Project are supported?**

A: Project 98, 2000, 2002, and 2003. English and German only at this time. If you have a different language version of MSP you may want to [contact Natara](#) to see if a version is available for you at the time.

**Q: What versions of Windows are supported?**

A: Windows 2000, XP Home and XP Pro. Project@Hand 2 MSP may very well work with older releases of windows such as Windows 98 or NT, but all testing has been done by Natara on 2000 and XP. Since Project@Hand loads MSP during a hotsync in order to communicate with it, it can tax older systems memory and processor speed.

**Q: Do I need to have MS Project installed on the system I am hotsyncing with? Or is having the .mpp files enough?**

A: You need to have MS Project installed on your hotsync machine. Project@Hand actually needs to load and communicate with the MSP application itself. It does so through a series of automation calls and relies heavily on certain registry entries being on that machine. Project@Hand never directly edit the .mpp files itself.

**Q: Does Project@Hand support any other desktop applications besides Microsoft Project.**

A: No, Microsoft Project is the only application it currently supports. We have no near term plans on providing a standalone project management application as developing it currently would be cost prohibitive.

**Q: Hotsync seems to stall while syncing one of my projects? Why is that?**

A: This is usually caused by Microsoft Project itself prompting the user for to answer a dialog. Close some of your windows and see if there is a dialog that is being presented by MSP. Try opening and saving the project itself in MSP to see if it prompts for any questions. Project@Hand does not have any way of knowing if MSP is doing this, and the process of syncing will halt until MSP gets a response to it's dialog question.

**Q: Why can I not sync some of my older Project files?**

A: Project@Hand requires that the .mpp files you sync with be of the same version as your version of Microsoft Project. In other words, you should not attempt to hotsync a Project 98 .mpp file if you have Project 2003 on your system. You need to first load that file into MSP 2003 and convert to the newer file format. After you do that, you can add it to your list of files to sync to your handheld. If you attempted to sync older project files, the hotsync process may stall because MSP may attempt to prompt in the background for the user to update the file.

**Q: Project@Hand sets some of my resources to "Work" type when they really should be "Material" types. Why is that?**

A: You are probably using Microsoft Project 98. MSP 98 did not have all the features that MSP 2000 and later does. One of the things it did not support is resource type. Therefore, all resources are set to type "work" when synced. You can set them to "material" on the handheld, but that field is ignored when a sync happens in the case of MSP 98. The same goes for Deadline since it is not supported in MSP 98.

**Q: I set the task priority to one thing, but it gets reset to another. Why is that?**

A: Once again this is caused by the use of Microsoft Project 98. MSP 98 had fewer priority settings than what MSP 2000 and greater have, so the conduit has to make a best guess as to what the field on the desktop should be set to if you set the priority on the handheld higher than those allowed on the desktop.

**Q: I am in a "group" situation where several people are responsible for a project. Can multiple users sync the same project file.**

A: Absolutely. If some users are meant only to view the status of a project, and you do not wish for them to make changes to the desktop project, you can set the project file as "Read Only" for their hotsync user.

**Q: When I hotsync, my projects are not being synced. Why is that?**

A: It may be any number of issues preventing the sync from occurring. Please check the Natará Support section for common answer to sync issues. One in particular is that you may have moved the Project@Hand application on the device out of main memory and onto a storage card. Doing so will prevent HotSync Manager from seeing the application, and therefore it will not attempt to run the Project@Hand conduit at sync time.

**Q: Sometimes when I sync I get a dialog box that states an application is "Not Responding" and asks if I want to "Switch to...", "Retry", or "Cancel". Why is that?**

A: At sync time, Project@Hand attempts to communicate with Microsoft Project through a series of calls. Normally, this happens in the background and you never know that MSP is running. If it is not running at the time of a hotsync, Windows will attempt to load MSP so that the communications can occur, and then will quit MSP when all is done. If Windows becomes bogged down due to low resources or for some other reason, and it is not able to determine that MSP has loaded in a timely fashion, these warning boxes will occur. Usually you can kick start things by hitting either the "Switch To" or "Retry" buttons a few times. It is common for this to occur when you are short on memory because you have too many applications open at the time you attempt a hotsync. Closing some other applications may help. If this is a common occurrence, you may also want to see if starting MSP prior to doing a hotsync helps. This is the case not only when trying to sync with MSP, but also with other conduits that attempt to sync with products like Outlook, Excel, etc.

**Q: Can I keep two copies of the same .mpp file, stored on different computers, in sync with each other by syncing with Project@Hand?**

A: No. Unlike other software where this is common, you can not do the same with Project@Hand. Project@Hand was never designed with this in mind and does not support syncing the same project with multiple desktops. It does not "prevent" you from doing it, but you will most likely end up with a project file that has unexpected results.

**Q: Where is Gantt Chart add-on that used to come with Project@Hand v1.5?**

A: The gantt chart is now integrated into Project@Hand.

**Q: I created a project on my handheld, but I don't see it listed in my list of projects being synced with on the desktop. Why might that be?**

A: Projects created on the handheld have a property that indicates if the project is to be synced to the desktop or not. Make sure you check that setting.

**Q: I moved one of my projects to a storage card via the Project@Hand interface on the handheld, and now it will not sync. Why?**

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A: The current version of Project@Hand 2 MSP does not support syncing projects that are located on a storage device. This may or may not change in future releases.

### **3.3 Project@Hand 2 handheld application**

The help for the Project@Hand 2 handheld application is covered in a separate document.

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