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4.1.01 System Data Administration (continued - Fixed Timed Action)

Timed Action

In the document type timed action the system services are administered for periodical actions in Projectile. Here, system processes as charts, data exchange, reminders, status reports or invoicing can be automated. These functions are accessible for certain user groups from the system and can be time controlled from the administrator.

Timed action Capacity Chart Team II, Cambridge							
Document Edit View Back references Actions							
Master data Misc							
Description	Capacity Chart Team II, Cambridge						
This user runs the timed action	Hahn Katrina						
TimedAction activated	☒						
Document type	CapacityChart						
Option	Service Update Availability Chei						
Professional query							
Event							
Usergroup	[1] Unit: Sales [2] Unit: Cambridge						
Recipient	☐ Jones Timothy						
Configuration	CapacityChart 1 CapacityChart						
Occurrence	Period		DaysTillAfterPeriod		OnlyWorkingDays		
1	Daily				☐		
Weekday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	☐	☐	☐	☐	☐	☐	☐
First occurrence	First occurrence		Last occurrence		Next occurrence		
	01.10.2009	18:14:13	17.11.2009	00:00:58	18.11.2009	00:00:00	

Defining Fixed Timed Actions

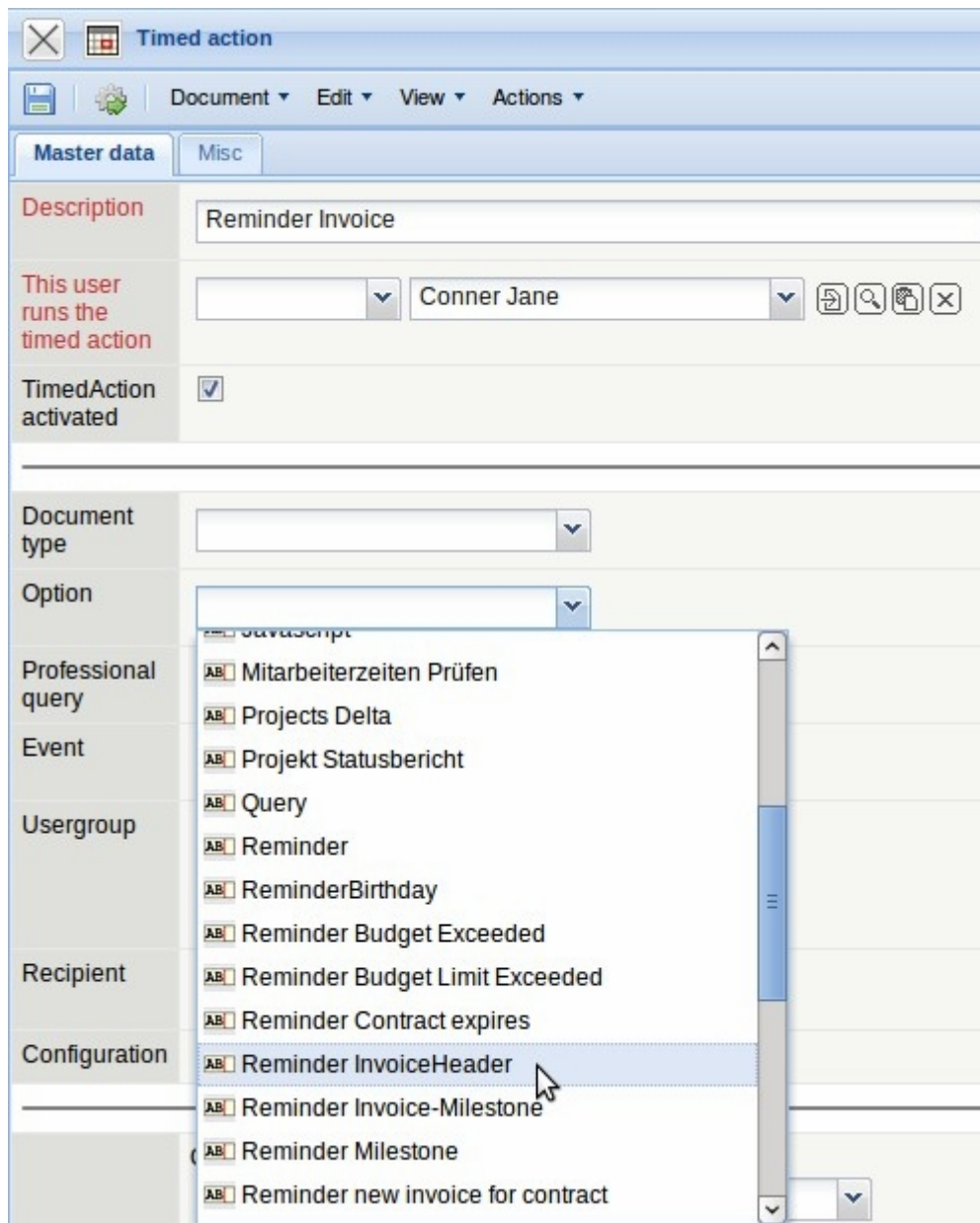
First a new document of the type timed actions ...



... is opened.

A screenshot of the 'Timed action' configuration window. The window has a title bar 'Timed action' and a menu bar with 'Document', 'Edit', 'View', and 'Actions'. Below the menu bar are two tabs: 'Master data' and 'Misc'. The 'Master data' tab is active. The form contains several fields: 'Description' (a text input field), 'This user runs the timed action' (a dropdown menu with 'Conner Jane' selected), 'TimedAction activated' (a checked checkbox), 'Document type' (a dropdown menu), 'Option' (a dropdown menu), 'Professional query' (a dropdown menu), 'Event' (a dropdown menu), 'Usergroup' (a dropdown menu with a download icon below it), 'Recipient' (a search icon), and 'Configuration' (a search icon). Below these fields is a section for scheduling: 'Occurrence' (a text input field with '1'), 'Period' (a dropdown menu), 'DaysTillAfterPeriod' (a text input field with 'd'), 'OnlyWorkingDays' (a checkbox), 'Weekday' (a row of checkboxes for Monday through Sunday), 'First occurrence' (a text input field with '18.11.2009'), 'Last occurrence' (a text input field), and 'Next occurrence' (a text input field).

Then the description field is filled out and an option is selected.



Timed action

Document Edit View Actions

Master data Misc

Description: Reminder Invoice

This user runs the timed action: Conner Jane

TimedAction activated: ☒

Document type: [Dropdown]

Option: [Dropdown]

Professional query: [Dropdown]

Event: [Dropdown]

Usergroup: [Dropdown]

Recipient: [Dropdown]

Configuration: [Dropdown]

Options list:

- Javascript
- Mitarbeiterzeiten Prüfen
- Projects Delta
- Projekt Statusbericht
- Query
- Reminder
- ReminderBirthday
- Reminder Budget Exceeded
- Reminder Budget Limit Exceeded
- Reminder Contract expires
- Reminder InvoiceHeader
- Reminder Invoice-Milestone
- Reminder Milestone
- Reminder new invoice for contract

In the example the option reminder invoiceheader is selected. This timed action sends an e-mail when a pre-configured invoice (for example from contracts) is due for invoicing.

Then the recipients for the timed action is determined (here all users of the global group manager)

Timed action							
Document Edit View Actions							
Master data		Misc					
Description	Reminder Invoice						
This user runs the timed action	Conner Jane	Find Search Refresh Close					
TimedAction activated	☒						
Document type							
Option	Reminder InvoiceHeader						
Professional query							
Event							
Usergroup	 Down Up Close Delete Copy Paste ☐ Add Group:Manager						
Recipient	Find 						
Configuration	Find available documents						
Occurrence	Period		DaysTillAfterPeriod		OnlyWorkingDays		
1			d		☐		
Weekday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
☐	☐	☐	☐	☐	☐	☐	☐
First occurrence	Last occurrence		Next occurrence				
18.11.2009	08:56:14						

... and also the employees Jane Conner and Timothy Jones). Individual employees as well as groups can be defined as recipients for the timed action.

Current selection: Recipient

Toggle filter

Hint: It is also possible to click on entries to include them

Include selection

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	Name	First name
☐	1 Belsito	Marina
☒	2 Conner	Jane
☐	3 Hahn	Katrina
☒	4 Jones	Timothy
☐	5 Müller	Georg
☐	6 Tate	Adam

The parameters of the timed actions are defined ...

Timed action

Document Edit View Actions

Save the document

This user runs the timed action

TimedAction activated ☒

Document type

Option

Professional query

Event

Usergroup ☐ Group:Manager

Recipient ☐ Conner Jane ☐ Jones Timothy

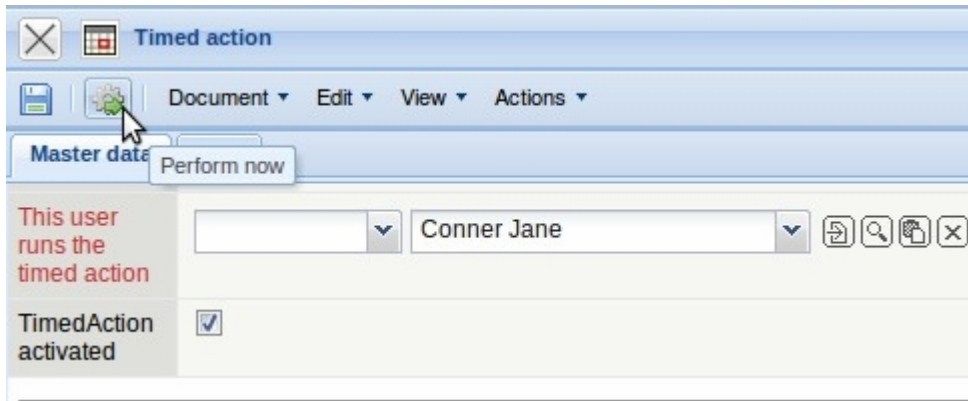
Configuration

	Occurrence	Period	DaysTillAfterPeriod	OnlyWorkingDays			
	1	Weekly	d	☐			
Weekday	Monday ☐	Tuesday ☐	Wednesday ☐	Thursday ☐	Friday ☐	Saturday ☐	Sunday ☐
First occurrence	First occurrence 18.11.2009	Last occurrence 14:00	Next occurrence				

... and then saved.



The timed action can be tested immediately, using the action “perform now”. This action forces an immediate performance of the timed action.



The recipient groups receive the results of the timed action through an e-mail:



If the e-mail is not sent (an appropriate entry is written in the log file) there are the following errors:

1. recipient of the timed action has no e-mail address in the master data (document employee),
2. the mail server is not entered in the administration tool (see also system default in the administration guide),
3. the mail server is not available from the Projectile server.

At this time the following timed actions are implemented in Projectile:

No.	Timed Action	Explanation
1	Reminder	Subject and text from the timed action are sent to the recipient. Otherwise, no other actions.
2	Reminder jobs: Stop watch is running	The timed action finds all time entries for the jobs, for which no “end” is set in TimeTracker. The viewing time span is until (including) yesterday. The e-mail is sent to the entered recipient and to the appropriate employee working on the job.
3	Reminder Birthday	Determines all active employees, who have birthday today + n (modifying factor) days (can be set in additional information). This timed action sends an e-mail to the entered recipient, with how many days until the birthday of the employee are remaining (or since the birthday, if modifying factor).
4	Reminder Milestones	This timed action reminds the appropriate project team and the recipient entered in the timed action of the milestone deadlines of the active projects. This e-mail is sent exactly one week before the due date of the milestone.
5	Reminder Offene Posten	This timed action searches all incoming payments and outgoing payments from included (foreign) invoices; if the incoming or outgoing amount < the amount of the (foreign) invoice, the entered recipient receives an e-mail with the (foreign) invoice, the expected amount, the amount paid and the difference.

No.	Timed Action	Explanation
6	Reminder Invoice	This timed action sends an e-mail to the entered recipient with a list, which invoice has not been included yet.
7	Reminder contract expires	This timed action checks all contracts (not employee contracts) and sends all contracts, which expire in exactly(!) one entered period in the contract, to the entered recipients. The periods of the timed action should therefore be daily!
8	Reminder Time Entry	This timed action tests the working time entries of all active employees. Time span: if the additional information is filled out, from start to end, these values are determined as follows: <Start>: entered value in the fields "start", in the additional information, if no value is stored the timed action uses the contents of the field "first occurrence". If the date in "first occurrence" is before the entry date of the employee, the employees entry date is used. <End>: entered field in the field "end", in the additional information, if the field is empty until yesterday is checked. The e-mail is sent to the entered recipient.
9	Reminder Time Entry Employee	This timed action checks the time entry of all active employees: from <start> to <end>, these values are determined as follows: <Start>: entered value in "start" in the additional information, if the field is empty the value from "first occurrence" is used, but not before contract begin! <End>: entered value in <end> in the additional information, if this field is empty, it will be controlled until (including) yesterday. The mail is sent to the entered recipient and to the appropriate recipient.
10	Reminder New Invoice for Contract	This timed action checks all contracts, in which the time span contains the current date; if no invoice is entered with the contract, which also contains the current day, an e-mail is sent to the entered recipient.
11	Export Notes	Expands the notes-interface file of the entered processes in Projectile; no e-mails are sent.
12	Javascript	This timed action performs the Javascript. Dieser Zeitdienst führt das angegebene Javascript aus.
13	Mitarbeiter Zeitkonten buchen	Dieser Zeitdienst bucht die Zeitkonten aller aktiven Mitarbeiter zum letzten des Vor-Vormonats; kein E-Mailversand.
14	Mitarbeiter Zeitkonten prüfen	Dieser Zeitdienst überprüft Gleitzeit, Urlaub und Sonderzeit der aktiven Mitarbeiter; wenn der Kontostand für <Gestern> unter den erlaubten Wert fällt, oder kein Vertrag für den Mitarbeiter gefunden wurde, werden die eingetragenen Benutzer informiert.
15	Warnung bei Überbeanspruchung der Ressource	Dieser Zeitdienst läuft über die in den Zusatzinformationen eingetragenen Projekte, sowie deren Unterprojekte: überprüft (optional) Ist-Zeit, interner Aufwand, externer Aufwand (alle 3 Felder aus den Zusatzinformationen) und sendet bei Überschreitung eines der Grenzwerte eine E-Mail an eingetragene Empfänger.
16	Projektstatus	Dieser Zeitdienst läuft über aktive Topprojekte und sendet Projektstatusbericht an eingetragene Empfänger.
17	Rechnungserstellung	Dieser Zeitdienst ermöglicht eine automatisierte Erstellen von Rechnungen nach Vorlage („Rechnungserstellung“ im Projekt) ohne Emailversand.
18	Warnung Arbeitspaket Enddatum	Dieser Zeitdienst läuft über alle Arbeitspaket ohne Projekt oder mit aktivem-/vorleistungs- Projekt, deren Plan-Ende vor dem aktuellen tag (+ Modifikator-Tage in Zusatzinformationen) liegt, die kein Ist-Ende eingetragen haben. Dieser Zeitdienst sendet eine Mail an die eingetragene Empfänger.

No.	Timed Action	Explanation
19	Warnung Plan/Ist-Zeiten	Dieser Zeitdienst listet alle Arbeitspakete auf, bei denen die erfasste Zeit den Plan-Aufwand übersteigt. Verschickt eine Mail an die eingetragenen Projektmanager, der betroffenen Projekte.

[... Fortsetzung](#)

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