

[previous](#) [Home](#) [next](#)

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 1	Period Daily	DaysTillAfterPeriod d	OnlyWorkingDays <input type="checkbox"/>			
Weekday	Monday <input type="checkbox"/>	Tuesday <input type="checkbox"/>	Wednesday <input type="checkbox"/>	Thursday <input type="checkbox"/>	Friday <input type="checkbox"/>	Saturday <input type="checkbox"/>	Sunday <input type="checkbox"/>
First occurrence	First occurrence 01.10.2009 18:14:13		Last occurrence 17.11.2009 00:00:58		Next occurrence 18.11.2009 00:00:00		

Defining Fixed Timed Actions

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



... is opened.

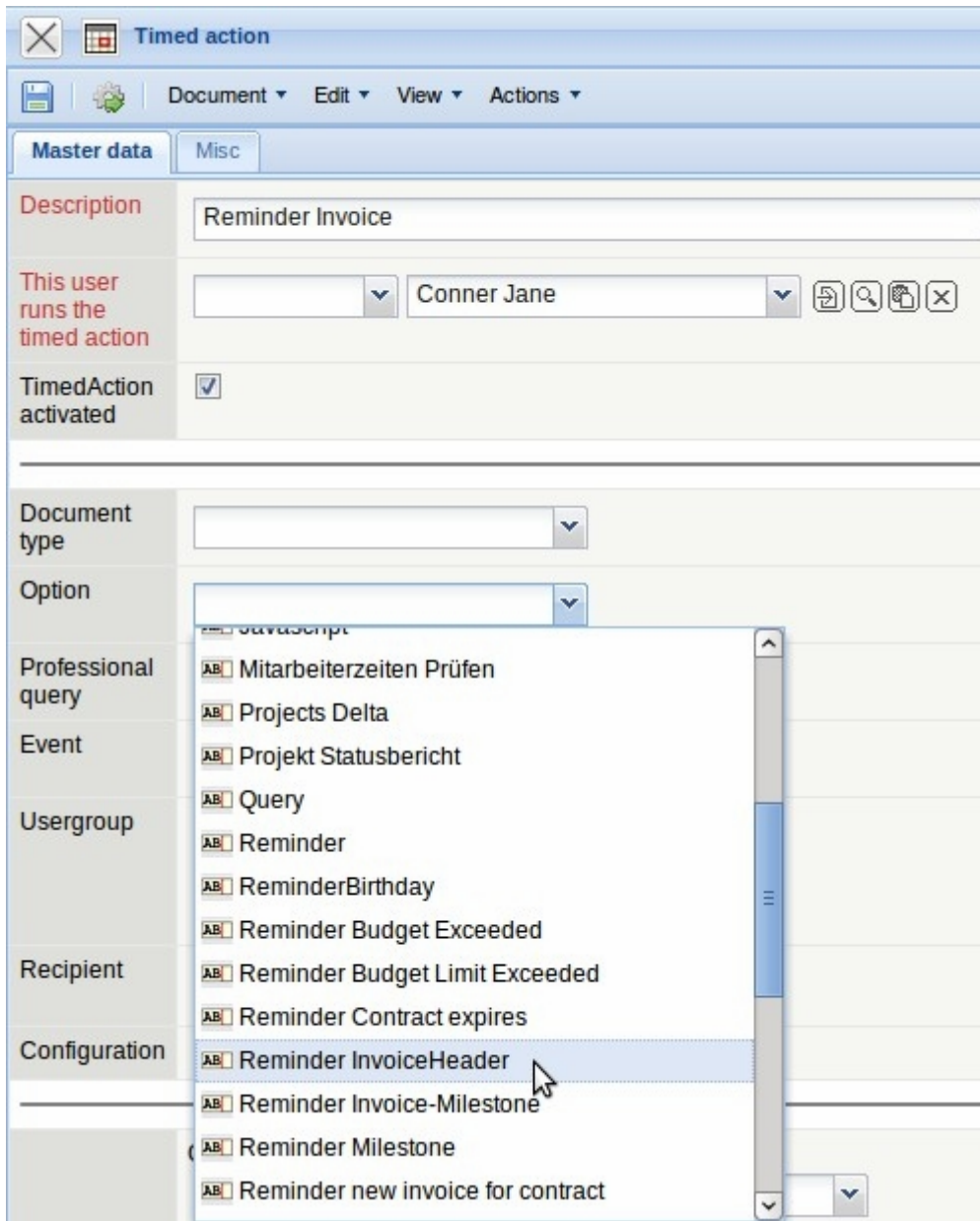
A screenshot of a software window titled 'Timed action'. The window has a menu bar with 'Document', 'Edit', 'View', and 'Actions'. Below the menu bar are two tabs: 'Master data' and 'Misc'. The 'Master data' tab is active and contains several fields:

- Description:** An empty text input field.
- This user runs the timed action:** A dropdown menu showing 'Conner Jane' with search and refresh icons.
- 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.
- Configuration:** A search and refresh icon.

Below these fields is a section for scheduling:

- Occurrence:** A text input field containing '1'.
- Period:** A dropdown menu.
- DaysTillAfterPeriod:** A text input field followed by 'd'.
- OnlyWorkingDays:** An unchecked checkbox.
- Weekday:** A row of checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- First occurrence:** A row of three text input fields with time pickers. The first field contains '18.11.2009', the second '08:56:14', and the third is empty.

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



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

TimedAction activated

Document type

Option Reminder InvoiceHeader

Professional query

Event

Usergroup

AB Group:Manager

Recipient

Configuration Find available documents

Occurrence 1

Period

DaysTillAfterPeriod d

OnlyWorkingDays

Weekday Monday Tuesday Wednesday Thursday Friday Saturday Sunday

First occurrence

First occurrence 18.11.2009 08:56:14

Last occurrence

Next occurrence

... 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

page 1 of 1

	Name	First name
<input type="checkbox"/>	1 Belsito	Marina
<input checked="" type="checkbox"/>	2 Conner	Jane
<input type="checkbox"/>	3 Hahn	Katrina
<input checked="" type="checkbox"/>	4 Jones	Timothy
<input type="checkbox"/>	5 Müller	Georg
<input type="checkbox"/>	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: Conner Jane

TimedAction activated:

Document type: [dropdown]

Option: Reminder InvoiceHeader

Professional query: [dropdown]

Event: [dropdown]

Usergroup: [dropdown]

Recipient: Conner Jane, Jones Timothy

Configuration: [dropdown]

Occurrence: 1, Period: Weekly, DaysTillAfterPeriod: [dropdown] d, OnlyWorkingDays:

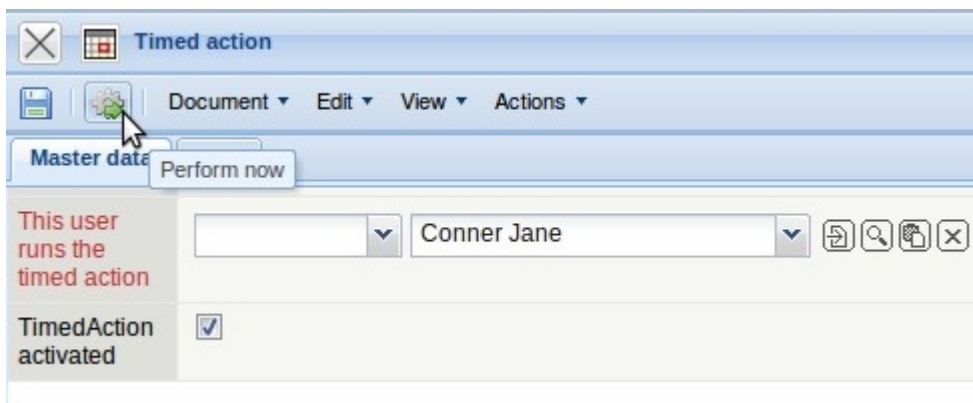
Weekday: Monday , Tuesday , Wednesday , Thursday , Friday , Saturday , Sunday

First occurrence: 18.11.2009, 14:00, Last occurrence: [dropdown], Next occurrence: [dropdown]

... 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 indicated Javascript.
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](#)

From: <https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link: https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_3:fortsetzung2&rev=1258546267

Last update: **2019/10/25 14:09**

