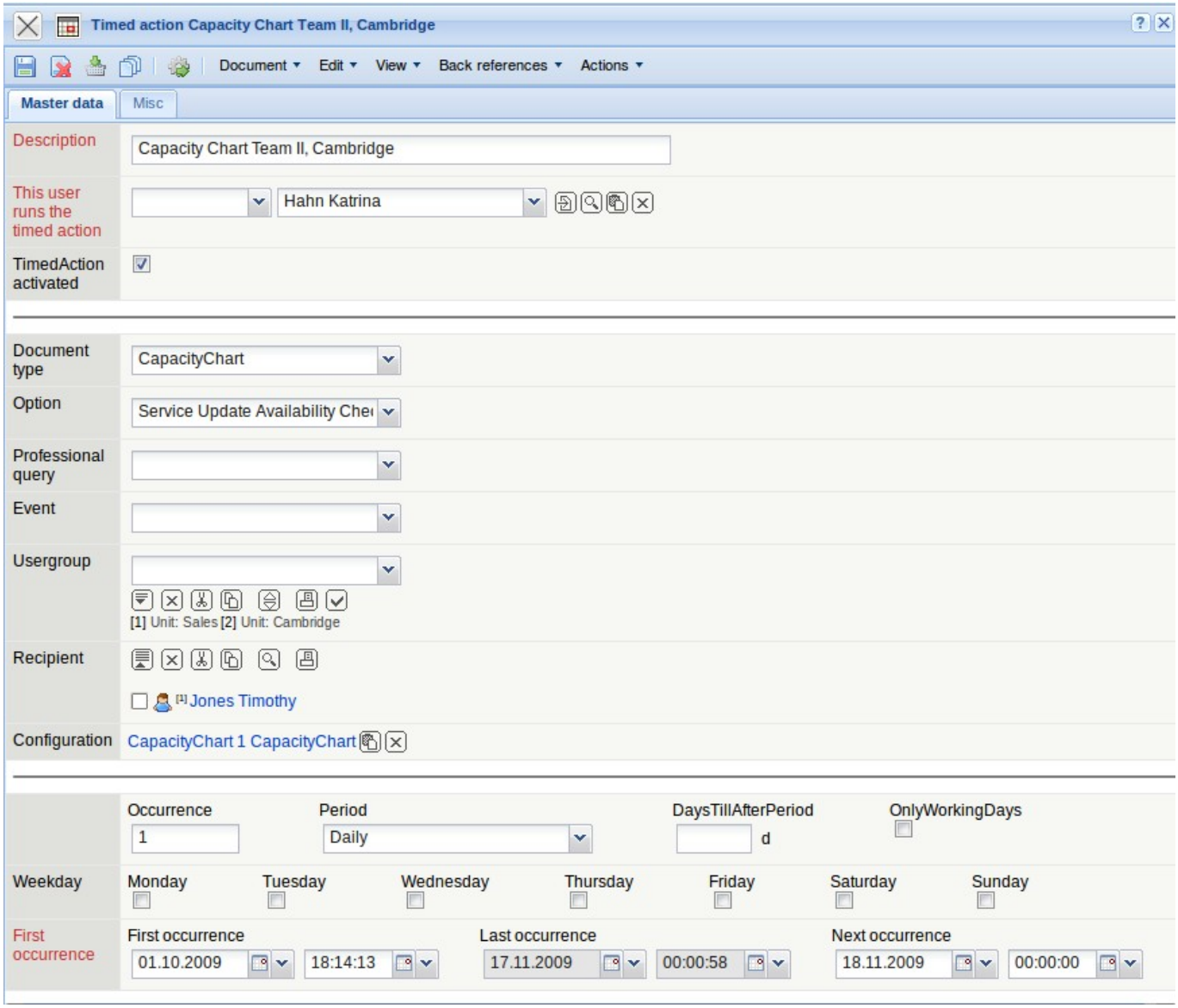
previous Home next

# 3.1.01 System Data Administration (continued - Fixed Timed Action)

## Timed Action

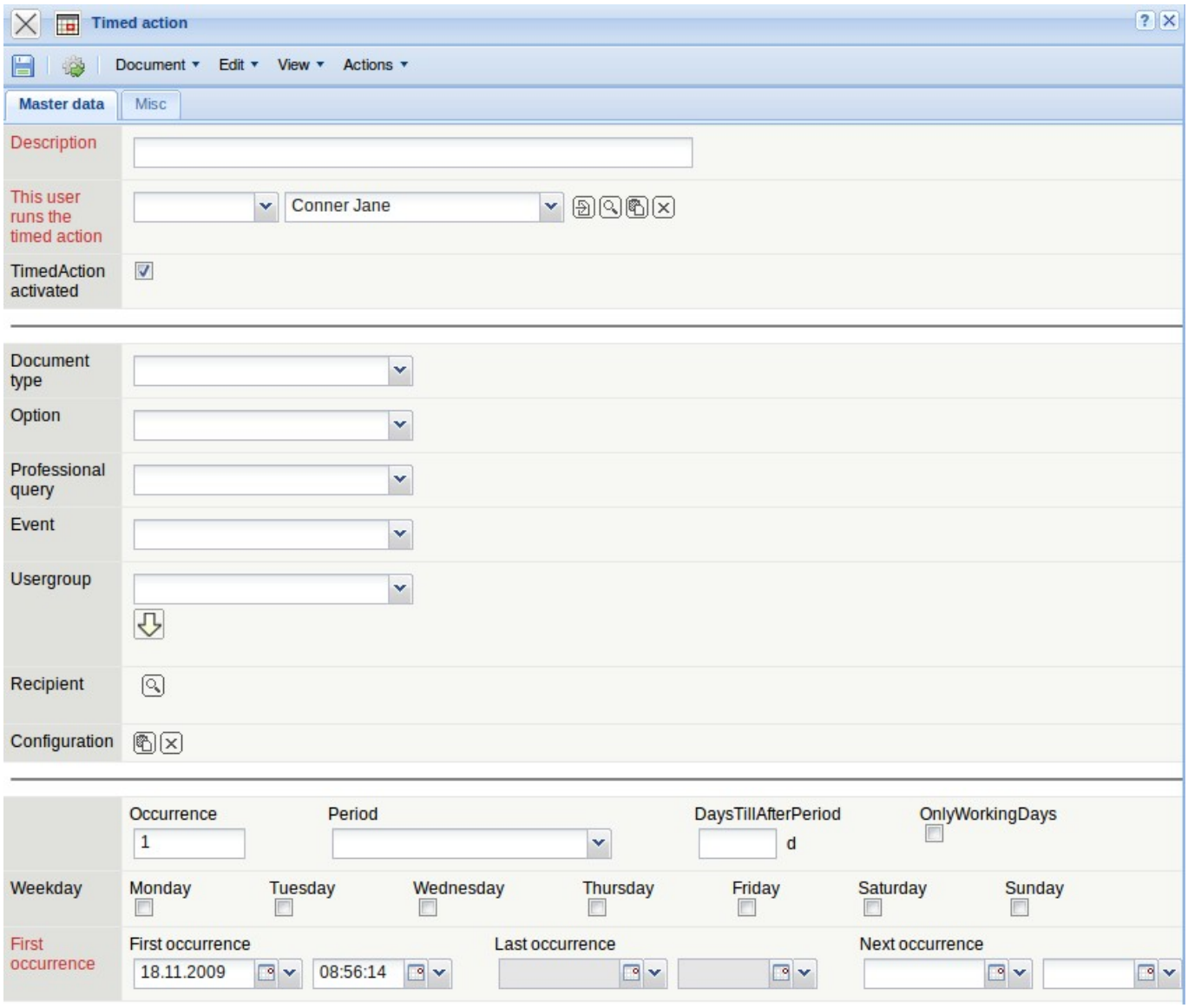
In the document type timed action the system services are administered for periodical actions in Projectile. Here, system processes as charts, data exchange, reminders, status reports or invoicing can be automated. These functions are accessible for certain user groups from the system and can be time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



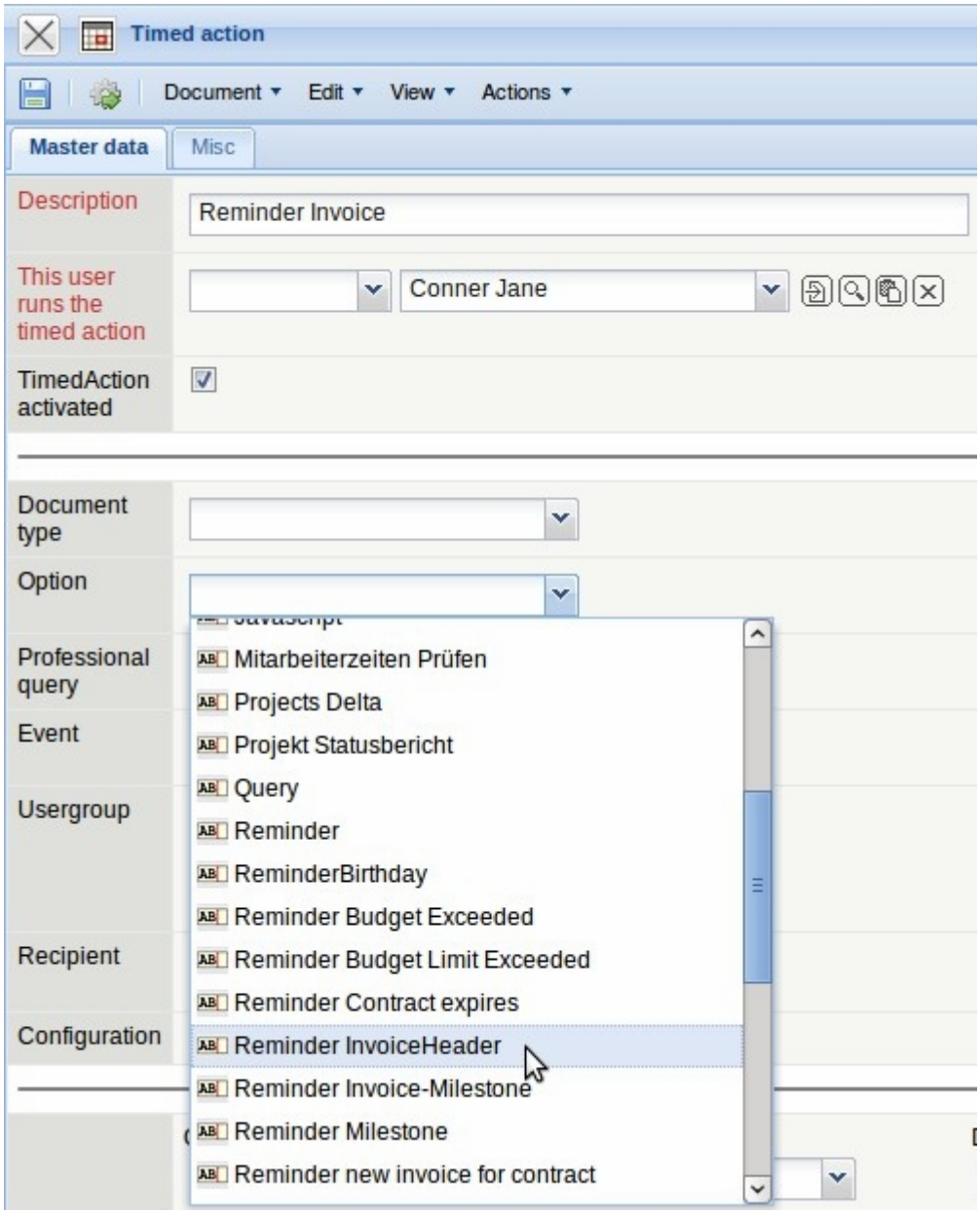

## Defining Fixed Timed Actions

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

... is created.

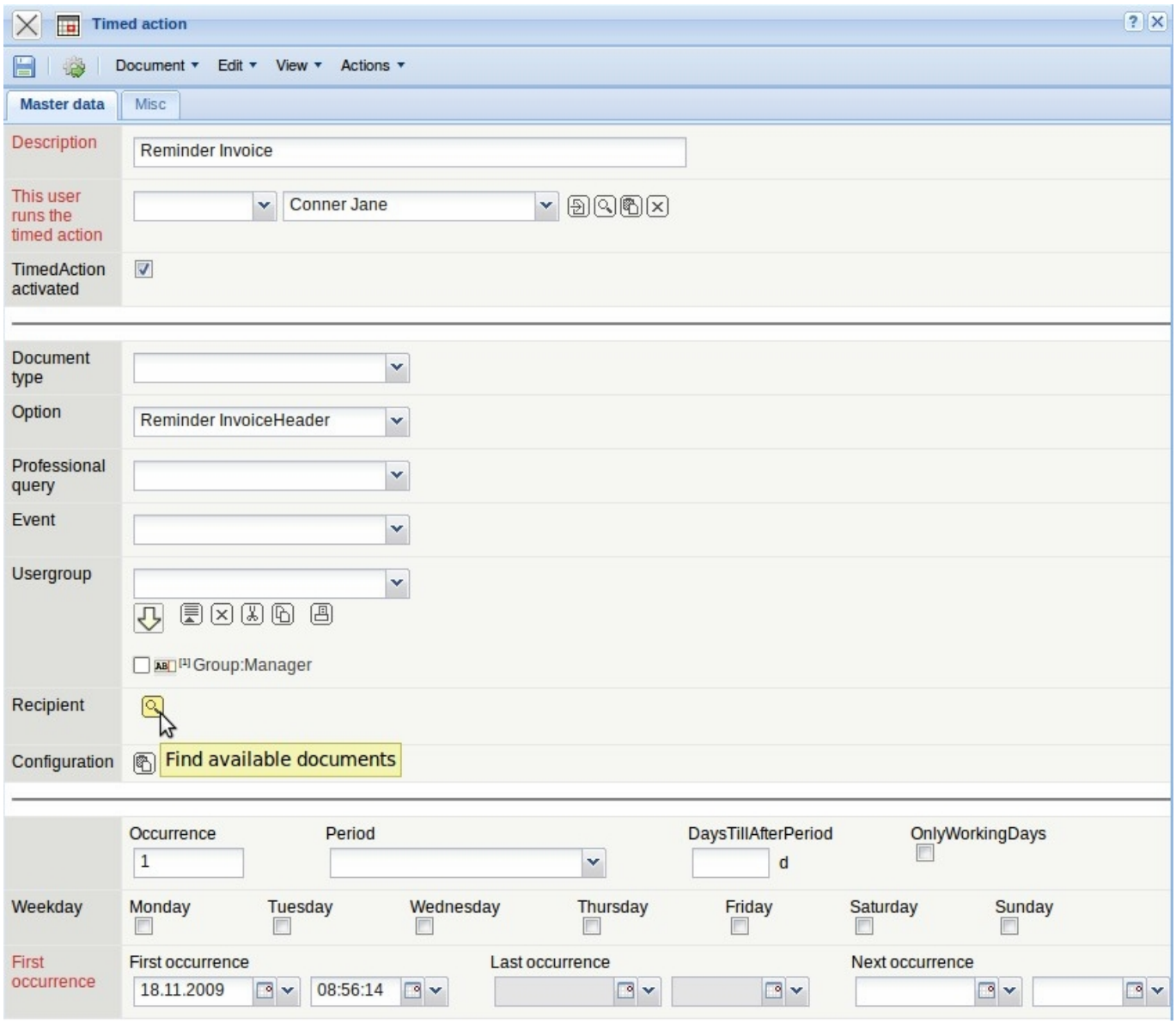



Then the description field is filled out and an option is selected.

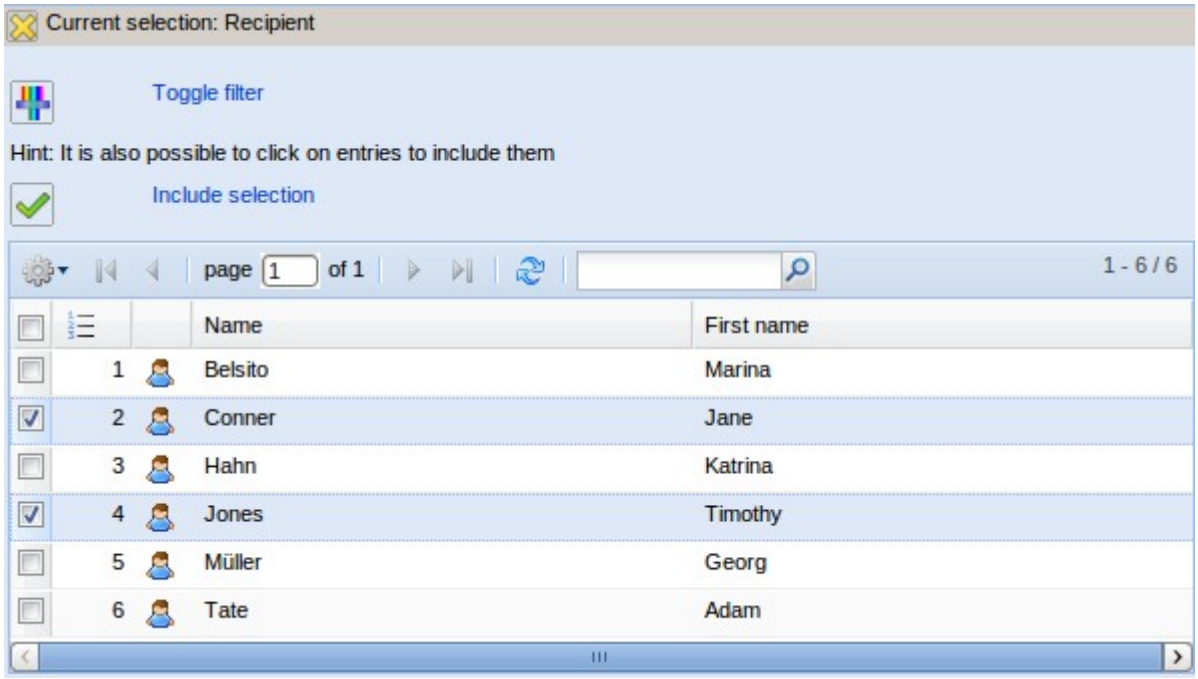



In the example the option reminder invoiceheader is selected. This timed action sends an e-mail when a pre-configured invoice (for example from contracts) is due for invoicing.

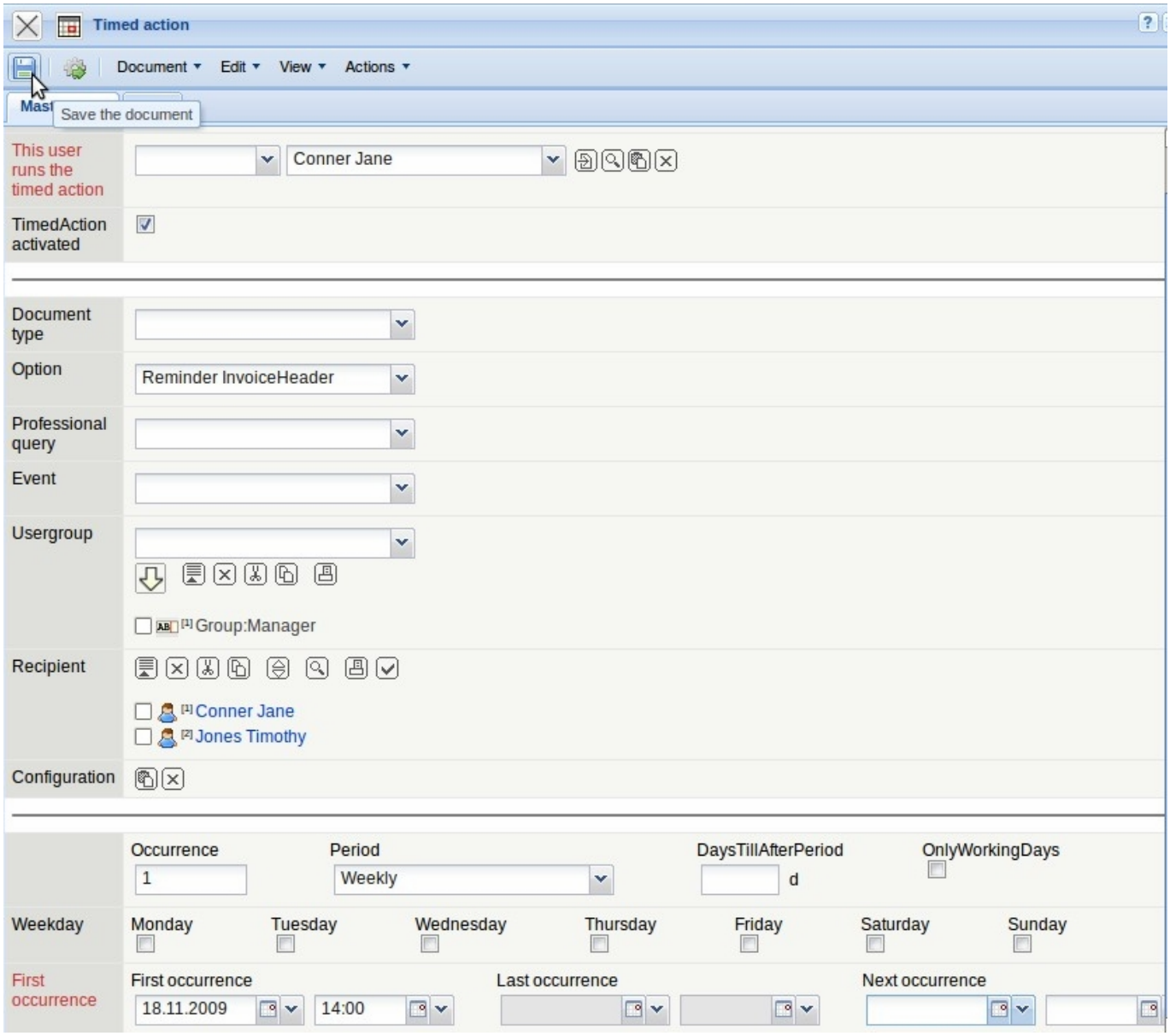
Then the recipients for the timed action is determined (here all users of the global group manager)




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

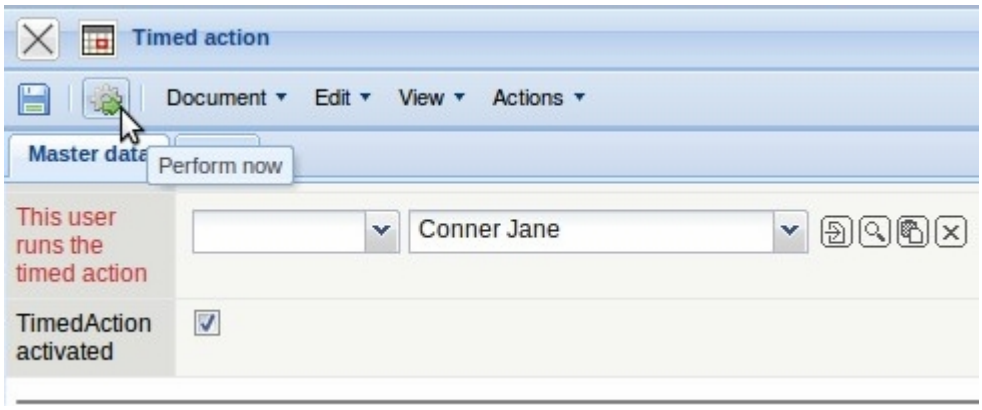



The parameters of the timed actions are defined ...



… 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 in 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 | Book Employee Time Accounts | This timed action posts the time accounts of all active employees to the last day of the pre-previous month; no e-mails are sent. |
| 14 | Check Employee Time Accounts | This timed action checks the flexible time, vacation and special time for the active employee; if the balance account for <yesterday> is lower than the allowed value or no contract for the employee has been found, the entered users are informed. |
| 15 | Warnung bei Überbeanspruchung der Ressource | This timed action checks the entered project in the additional information, as well as their sub-projects: checks (optionally) the actual time, internal time/effort, external time/effort (all 3 fields from the additional information) and send an e-mail to the entered recipient when the limit has been exceeded. |
| 16 | Project Status | This timed action checks the active top projects and sends the project status report to the entered recipient. |
| 17 | Create Invoice | This timed action creates automated invoices using templates (“invoicing” in project). No e-mail is sent. |
| 18 | Warnung Job Date | This timed action checks all jobs without projects or with active projects or advanced effort projects, where the planned end is before the current day (+ modifying value-days in the additional information), where no actual end is entered. This timed action sends an e-mail to the entered recipient. |

| No. | Timed Action | Explanation |
|---|---|---|
| 19 | Warnung Job Times | This timed action lists all jobs in which the entered times exceed the planned time/effort. An e-mail is sent to the entered project manager of the corresponding project. |

... continued

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