
Rillsoft Integration Server Documentation

Release 10

Rillsoft GmbH

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Rillsoft Integration Server (RIS) complements Rillsoft Project with central client, user and resource pool management, roles and permissions, and add-ons such as iCalendar, email notification, time entry and document management. The help is organized into five sections: quick start, task-oriented help, role-based help, expert knowledge, and reference system.

LEGAL NOTICE

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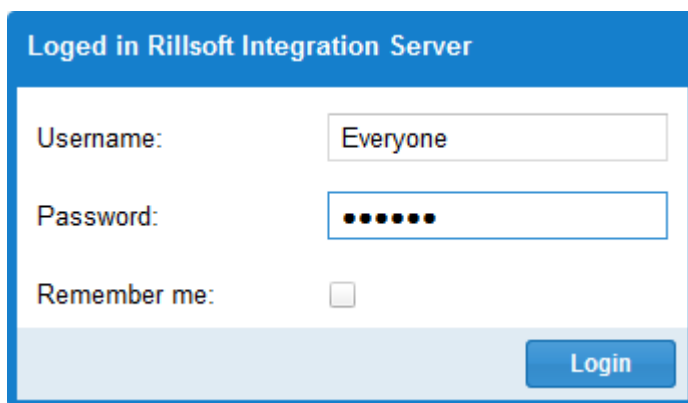
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QUICK START

This section guides new administrators and users through the initial setup of Rillsoft Integration Server (RIS) in a few steps: choose an operating model, create the first client, create the first user, and connect the resource pool.

2.1 Registration

First, a registration is required.

A screenshot of the Rillsoft Integration Server login interface. The window has a blue title bar that says "Logged in Rillsoft Integration Server". Below the title bar, there are three input fields: "Username:" with the text "Everyone", "Password:" with masked characters (dots), and "Remember me:" with an unchecked checkbox. At the bottom right of the form is a blue "Login" button.

The following pages will help you to fit your personal requirements by working in Rillsoft Project with Rillsoft Integration Server.

2.2 Set up RIS: server or cloud

Goal: You know the two operating models of Rillsoft Integration Server and log in for the first time.

Duration: approx. 5 minutes

Prerequisite: Login credentials for your RIS instance (cloud or on-premises server) from your IT administration.

Rillsoft Integration Server is available in two operating models:

- **Cloud** — hosted by Rillsoft, no own server required.
- **On-premises server** — operated on your own network.

Note

Not every feature is available equally in both modes: *LDAP integration* (importing users from Active Directory) is available exclusively on the on-premises server, see *Expert Knowledge*.

2.2.1 Step by step

1. Open the login page of your RIS instance in a browser.

2. Log in with the credentials provided by your IT administration.

2.2.2 Check the result

After logging in, you see the main menu of Rillsoft Integration Server. Next, you typically create the first client, see *Create your first client*.

choose operating model, set up cloud, set up on-premises, ris, integration server, cloud, on-premises, on-premises server, operating model, multi-user, it-administration

2.3 Create your first client

Goal: You create your first client. This automatically gives you a dedicated resource pool for this company or business unit.

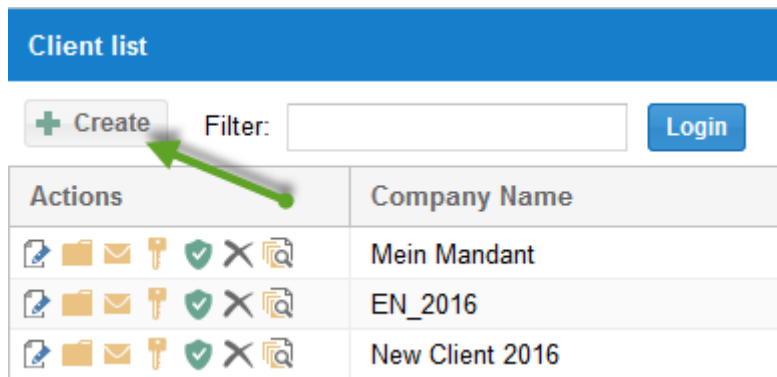
Duration: approx. 5 minutes

Prerequisite: You are logged in as administrator, see *Set up RIS: server or cloud*.

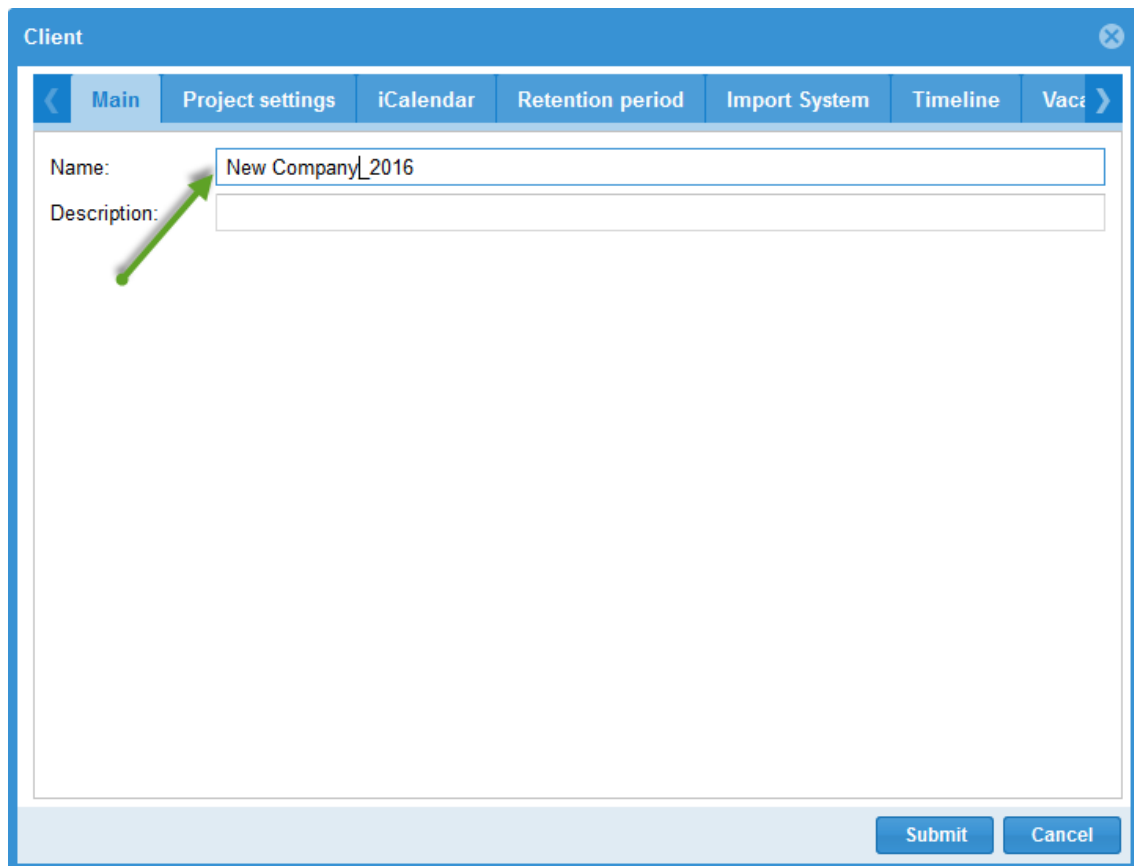
As a rule, exactly one resource pool is created per client. Accordingly, you should work with only one resource pool per client — if you want to draw resources from several resource pools, create several clients accordingly.

2.3.1 Step by step

1. Go to **Administration > Clients**.
2. Click the **New client** button.



3. On the **General** tab, enter a name and optional notes.



4. Confirm with **Save**.

2.3.2 Check the result

The new client appears in the client list under **Administration > Clients**. Rillsoft Integration Server has automatically created an empty resource pool for this client. In Rillsoft Project, this resource pool is selected via **File > Resource pool > Rillsoft Integration Server > Select**, see [Connect the resource pool to Rillsoft Project](#).

Next steps: Further settings (project properties, iCalendar, retention periods, holiday planning, etc.) are optional and can be adjusted later at any time. To create users for this client, see [Create your first user and assign a role](#).

create client, new client, client, clients, customer, company, create resource pool,

it-administration

2.4 Create your first user and assign a role

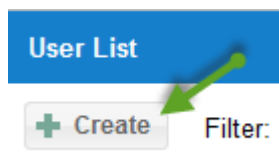
Goal: You create a user, give them access to a client, and assign a user role so they can work with the appropriate access rights.

Duration: approx. 5–10 minutes

Prerequisite: At least one client has been created, see [Create your first client](#).

2.4.1 Step by step

1. Go to **Administration > Users** and click the **New user** button.



2. Enter the master data (name, phone, etc.) in the dialog and save.

The 'New user' dialog form contains the following fields and options:

- Username:** test
- Password:** masked with dots
- Confirm Password:** masked with dots
- ☒ Change Password on next login
- ☒ Create temporary password
- First Name:** Tom
- Last Name:** Sllouper
- E-mail:** ts@gmail.com
- Phone:** (empty field)
- Mobile:** (empty field)
- Notes:** (empty text area)
- Buttons:** Submit, Cancel

3. **Assign client access:** In the **Action** column, click the client button and share the desired client with +.

Rillsoft Integration Server 9.36.195

ADMINISTRATION

Users

Clients

Client release

Organisation chart

User roles

Folders

Folder roles

PROJECTS

Locks

Projects

Portfolio

Links

RESOURCE POOL

Employees

Employee role

Teams

Calendar

Dev

Timesheet

Allocation of personnel resources the user: Martin Mustermann

Client: EN Filter:

Acti...	Start work	First n...	Last name	Email	Code	Team	Qualification
-	12.01	Red	Superman	superman@exampl.com		12.001 South	13.001 manager
✓	13.01	John	Tidy	td@gmail.com		11.001 North - Team A	11.001 programmer - C++
-	13.02	John	Tidy	td@gmail.com		11.001 North - Team A	11.003 programmer - V.Basic
-	14.01	Bill	Diligent	dlg@gmail.com		13.001 East	11.003 programmer - V.Basic
✓	14.02	Bill	Diligent	dlg@gmail.com		13.001 East	11.002 programmer - PHP
-	15.01		Goeslike	goeslike@exampl.com		12.001 South	16.001 support
-	15.02		Goeslike	goeslike@exampl.com		12.001 South	12.001 writer

Alternatively, client sharing can also be granted for several users at once via **Administration > Client sharing**.

- Assign a user role:** Use the **Manage user rights** icon button to assign a suitable user role, e.g. **Project user** or **Project manager**. Rillsoft Integration Server provides seven predefined user roles for this, see [Manage users and permissions](#).

2.4.2 Check the result

The new user appears in the user list under **Administration > Users** with client access and an assigned user role, and can log in with their credentials.

Next steps: To also assign the user to specific folders or projects, additionally assign a suitable folder role, see [Manage clients](#).

create user, assign role, user, account, access, client sharing, it-administration

2.5 Connect the resource pool to Rillsoft Project

Goal: You know how a client's resource pool relates to Rillsoft Project, how to select it in Rillsoft Project, and where to find it in Rillsoft Integration Server.

Duration: approx. 5 minutes

Prerequisite: At least one client has been created, see [Create your first client](#).

As a rule, exactly one resource pool is created per client. This resource pool is used by Rillsoft Project for planning — resources, roles and teams that you maintain in Rillsoft Integration Server are available there.

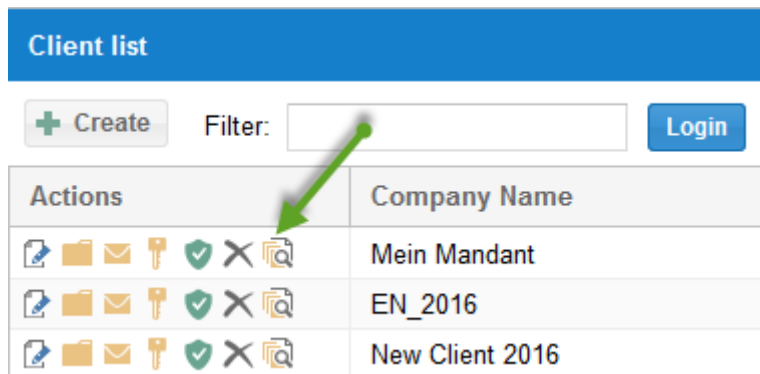
2.5.1 Step by step: select the resource pool in Rillsoft Project

- In Rillsoft Project, close all open projects.
- Click **File > Resource pool > Rillsoft Integration Server > Select**.
- In the **RIS Client** dialog, select the desired client and confirm with **OK**.

From now on, Rillsoft Project uses the resource pool of this client. The source of the current resource pool is shown in the left corner of the status bar of Rillsoft Project (a project should be open). A resource pool maintained so far as a *.xml file can be imported into Integration Server via **File > Resource pool > Rillsoft Integration Server > Import**. Details in the Rillsoft Project help: [Create and Select a Resource Pool with Rillsoft Integration Server](#).

2.5.2 Step by step: find the resource pool in RIS

1. Go to **Administration > Clients**.
2. In the row of the desired client, click the resource pool icon button to list all resource pool versions of this client.



2.5.3 Check the result

You see the resource pool versions of the client — if needed, you can restore an earlier version.

Next steps: Manage personnel, roles and teams in the resource pool under [Resource pool and teams](#).

connect resource pool, resource pool path, select resource pool, create new resource pool, select client, import resource pool, resource pool, personnel, employees, teams, roles, it-administration, resource-manager

TASK-ORIENTED HELP

This section describes the day-to-day administration and use of Rillsoft Integration Server: manage clients, maintain users and access rights, organize the resource pool and teams, share projects and portfolios, enable teamwork with summary projects, and configure add-ons.

3.1 Manage clients

A client bundles a resource pool as well as the associated folders, users and access rights. This section describes creating, editing and managing clients as well as the associated organizational structure (organization chart, folders, folder roles).

3.1.1 Clients

A client bundles its own resource pool as well as the associated folders, users, and access rights. This page gives an overview of the available functions; each function is described in detail on its own page (see “Related topics”).

First select **Administration > Clients**.

Client list		
Create Filter: Login		
Actions	Company Name	Description
	Maschinenbau	
	Mein Mandant	
	EN_2016	
	New Client 2016	

As a rule, one resource pool is created per client. Accordingly, you should work with only one resource pool per client.

Functions

- correct a client’s description by clicking the icon button Pen . Here you can change the name and notes.
- edit the client’s portfolio structure hierarchy by clicking the icon button Folder .

- create and edit an e-mail templates list for the client by clicking the icon button .
- create a new client by clicking the **New Client** button.
- get a user list of the client and their roles by clicking the icon button .
- determine floating licenses of the client by clicking the icon button .
- delete a client by clicking the icon button .
- show all existing resource pool versions of a client by clicking the icon button  and return to a previous resource pool version.

3.1.1.1 Related topics

- [Client release](#) — general access authorization for a user to work with a client
- [Manage clients](#)
- [Create your first client](#)

3.1.1.2 See also

New client

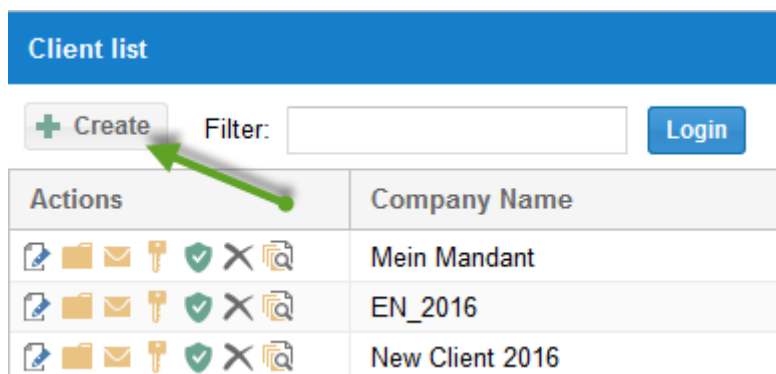
Goal: you create a new client and learn about the optional settings you can configure now or later.

Prerequisite: you are logged in as administrator.

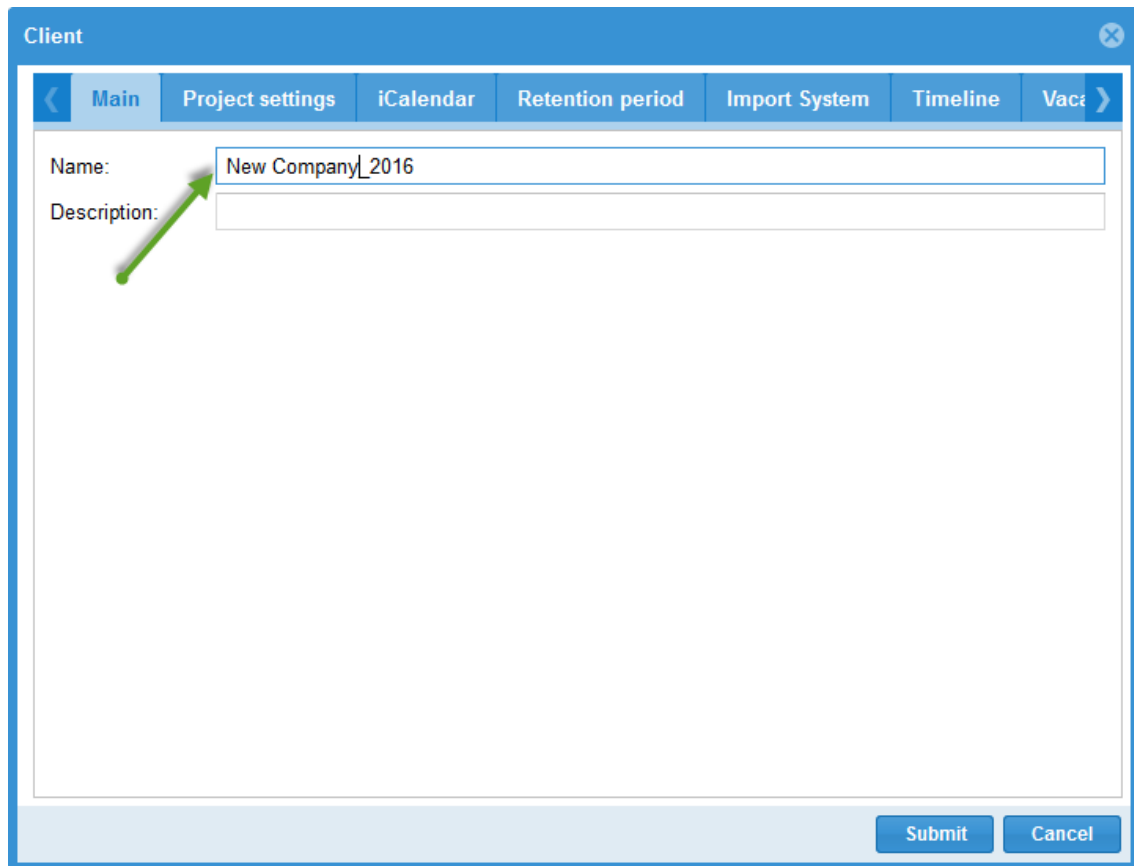
Steps 1–4 are enough for a minimal initial setup; all further tabs are optional settings that you can adjust at any later time (see also [Edit a client](#)).

Step by step

1. Select **Administration > Clients**.
2. Click the button



3. On the **General** tab, enter a name and notes.



Client

< Main Project settings iCalendar Retention period Import System Timeline Vaca >

Name: New Company_2016

Description:

Submit Cancel

4. Click the **Save** button to save the information.

Check the result

The new client appears in the client list. You can now optionally configure the following tabs.

Further tabs (optional)

Project properties

Here you set the presentation rule for settings, header/footer, and user views.

The screenshot shows the 'Client' settings window with the 'Project settings' tab selected. The window contains three dropdown menus for configuration:

- Settings for project:** per project/portfolio
- Settings for header and footer:** per project/portfolio
- Settings for user view:** per project/portfolio (selected), per project/portfolio, per user of client, per client

At the bottom right, there are 'Submit' and 'Cancel' buttons.

You define whether project settings such as

- units of time for duration and effort, etc.
- column arrangement in tables
- time scale representation

should be used as default settings for other projects or not. You can also define the presentation of headers/footers and user views the same way.

The following options are available:

- per project/portfolio. Each project/portfolio has its own settings.
- per user of the client. All projects/portfolios the user opens are displayed with the same settings.
- per client. This variant provides a consistent presentation of all projects/portfolios for all users of the company.

iCalendar

Here you define which information is passed on to Outlook.

Client

iCalendar
Retention period
Import System
Timeline
Vacation planning
Vacations

Name of activity: %task_name%

Name of project: %project_name%

Description: %task_employees%, %project_notes%

Parameter:

- %project_user_field14% - Project user field 15
- %project_user_field15% - Project user field 16
- %project_user_field16% - Project user field 17
- %project_user_field17% - Project user field 18
- %project_user_field18% - Project user field 19
- %project_user_field19% - Project user field 20
- %task_uuid% - Universally Unique Identifier number of activities
- %task_name% - Name of activities
- %task_employees% - Name of employee
- %task_code% - Code of activities
- %task_priority% - Priority Name of activities
- %task_start_date_time% - Start of activities
- %task_finish_date_time% - Finish of activities
- %task_notes% - Notes of activities
- %task_completed% - Completed of activities
- %task_physical_metric% - Unit of deliverable activities
- %task_physical_norm% - Norm of deliverable activities
- %task_physical_volume% - deliverable activities
- %task_labour_intensity% - effort of activities
- %task_duration% - Duration of activities

Submit
Cancel

After double-clicking an appointment in the Outlook calendar, this information is visible.

Retention periods

Here you define when projects, project revisions, and resource pool revisions marked for deletion should be permanently deleted.

Client

Main
Project settings
iCalendar
Retention period
Import System
Timeline
Vacc

Delete project revision
at the end of 300 days

Delete resource pool revision
at the end of 500 days

Delete projects are marked for deletion
at the end of 1 days

Submit
Cancel

Note

- A folder is only permanently deleted once all projects it contains have been permanently deleted after the retention period.
- Permanently deleted projects/folders cannot be restored.
- Returning to a deleted revision (project/resource pool) is not possible.

Project Import

Client

< Retention period

Import System

Vacations import

Timeline

Vacation planning

DMS >

Project View:

Level1 View:

Level2 View:

Level3 View:

Level4 View:

Submit

Cancel

Timeline

Client

< Main Project settings iCalendar Retention period Import System Timeline Vacation >

Title: %project_name% %task_name%

Description: %task_employees% %task_user_field0% %task_notes%

Parameter:

 %task_start_date_time% - start date of activity

 %task_finish_date_time% - end date of the activity

 %task_notes% - notes of activity

 %task_completed% - completed percentage of the activity

 %task_physical_metric% - unit of the deliverable of the activity

 %task_physical_norm% - norm of the deliverable of the activity

 %task_physical_volume% - deliverable activity

 %task_labour_intensity% - effort of activity

 %task_duration% - duration of the activity

 %task_extra_cost% - fixed costs of activity

 %task_payment_cost% - amount for the period of the activity

 %task_payment_delay% - payment period for the date of payment for the activity

 %task_payment_date% - date of the receipt of the payment for the activity

 %task_user_field0% - activity's user-defined field 1

 %task_user_field1% - activity's user-defined field 2

 %task_user_field2% - activity's user-defined field 3

 %task_user_field3% - activity's user-defined field 4

 %task_user_field4% - activity's user-defined field 5

 %task_user_field5% - activity's user-defined field 6

 %task_user_field6% - activity's user-defined field 7

 %task_user_field7% - activity's user-defined field 8

 %task_user_field8% - activity's user-defined field 9

 %task_user_field9% - activity's user-defined field 10

Submit Cancel

Vacation planning

On this tab you define how non-working days are synchronized between Rillsoft Integration Server (Rillsoft Cloud) and, if applicable, Rillsoft Project. If a project planner has already defined employees' non-working days in the Rillsoft Project client itself, you can choose one of two variants here:

- either add and combine the non-working days from the Rillsoft Project resource pool
- or discard the non-working days from the Rillsoft Project resource pool and only consider the non-working days from Rillsoft Integration Server (Rillsoft Cloud)

Client

< Retention period
Import System
Vacations import
Timeline
Vacation planning
DMS
>

Synchronization:
Combine with the resource pool

Vacation days:
Replace in resource pool
Combine with the resource pool

Combine vacation days from the Rillsoft Integration Server and the resource pool of Rillsoft Project

Replace vacation days in the Rillsoft Project resource pool with vacation days from the Rillsoft Integration Server

Submit
Cancel

Vacation Import

Client

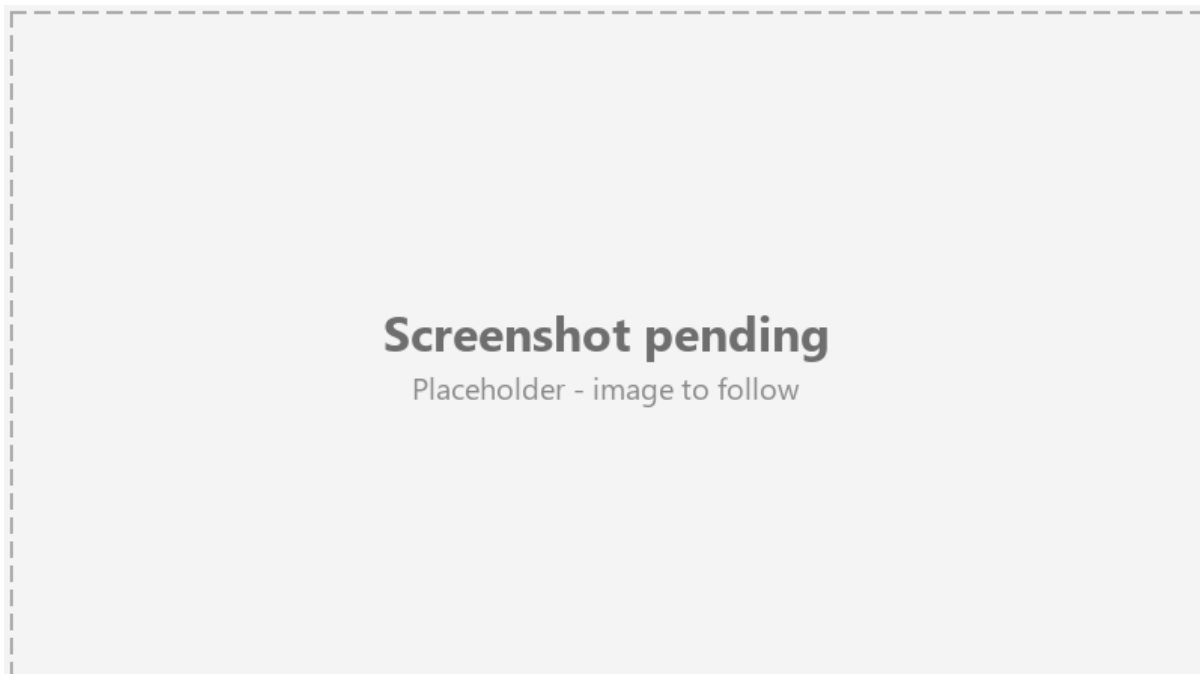
< idar Retention period Import System Timeline Vacation planning **Vacations import** >

Employees
table/view:

Users table/view:

Submit Cancel

Documents



Note

No English screenshot of the Documents tab exists yet; the placeholder above

will be replaced once one is captured.

Related topics

- [Edit a client](#)
- [Portfolio structure hierarchy of a client](#)
- [E-mail templates list](#)
- [Create your first client](#)

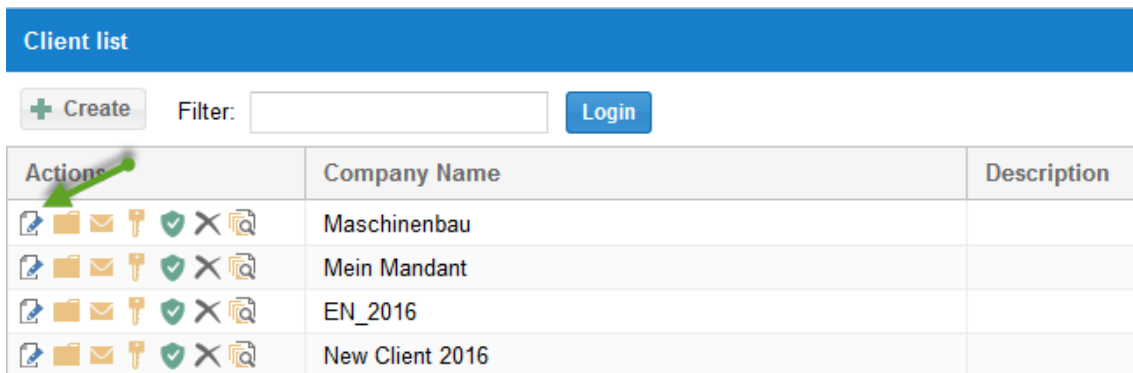
Edit a client

Goal: you change the description of an existing client and, if needed, adjust the optional settings (the same tabs as when creating a client, see [New client](#)).

Prerequisite: you are logged in as administrator; the client already exists.

Step by step

1. Select **Administration > Clients**.
2. Click the button



Client list		
+ Create Filter: Login		
Actions	Company Name	Description
      	Maschinenbau	
      	Mein Mandant	
      	EN_2016	
      	New Client 2016	

to edit the client description.

3. Click the **Save** button to save the information.

Check the result

The changed information appears in the client list.

Further tabs (optional)

As when creating a client (see [New client](#)), further tabs are available:

Project properties

Here you set the presentation rule for settings, header/footer, and user views.

The screenshot shows the 'Client' settings window with the 'Project settings' tab selected. The window contains three dropdown menus for configuration:

- Settings for project:** per project/portfolio
- Settings for header and footer:** per project/portfolio
- Settings for user view:** per project/portfolio (selected), per project/portfolio, per user of client, per client

At the bottom right, there are 'Submit' and 'Cancel' buttons.

You define whether project settings such as

- units of time for duration and effort, etc.
- column arrangement in tables
- time scale representation

should be used as default settings for other projects or not. You can also define the presentation of headers/footers and user views the same way.

The following options are available:

- per project/portfolio. Each project/portfolio has its own settings.
- per user of the client. All projects/portfolios the user opens are displayed with the same settings.
- per client. This variant provides a consistent presentation of all projects/portfolios for all users of the company.

iCalendar

Here you define which information is passed on to Outlook.

Client

iCalendar
Retention period
Import System
Timeline
Vacation planning
Vacations

Name of activity: %task_name%

Name of project: %project_name%

Description: %task_employees%, %project_notes%

Parameter:

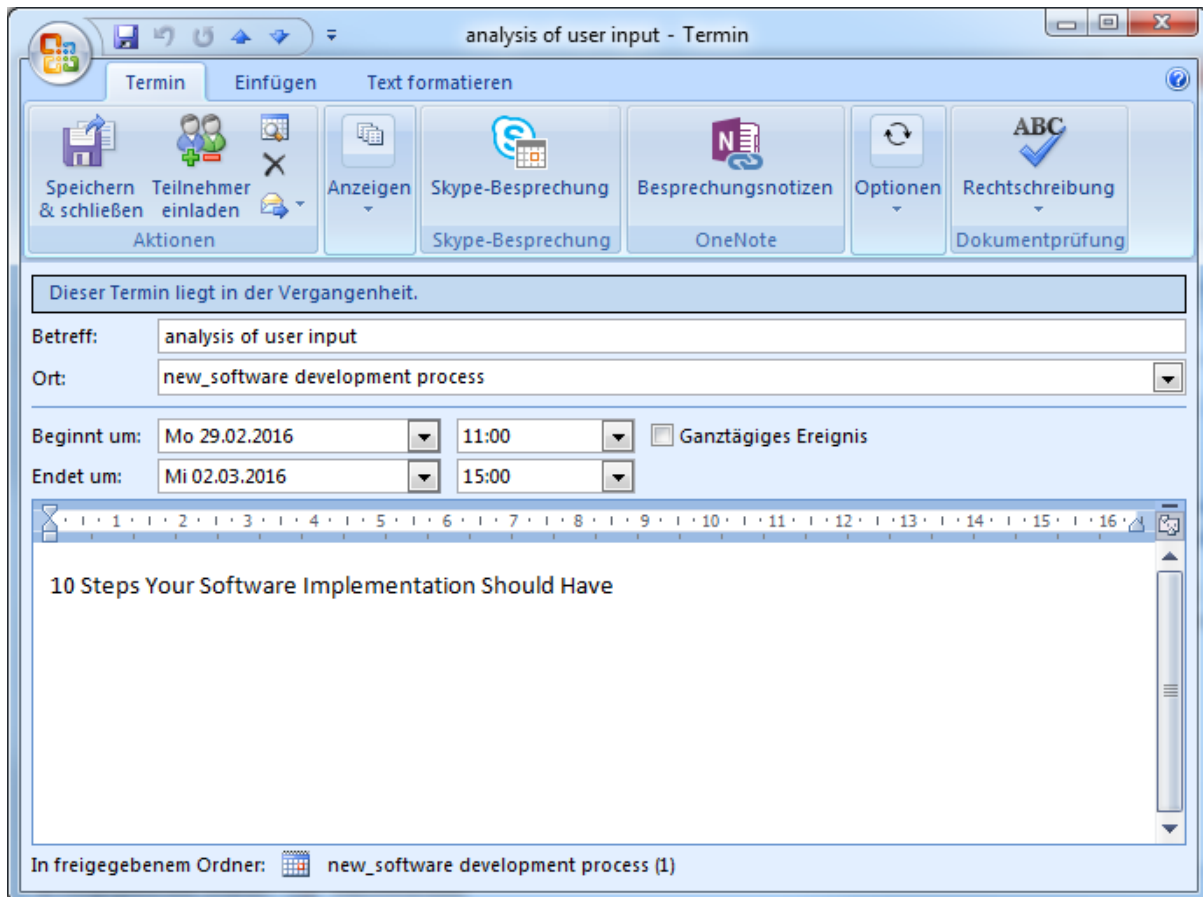
- %project_user_field14% - Project user field 15
- %project_user_field15% - Project user field 16
- %project_user_field16% - Project user field 17
- %project_user_field17% - Project user field 18
- %project_user_field18% - Project user field 19
- %project_user_field19% - Project user field 20
- %task_uuid% - Universally Unique Identifier number of activities
- %task_name% - Name of activities
- %task_employees% - Name of employee
- %task_code% - Code of activities
- %task_priority% - Priority Name of activities
- %task_start_date_time% - Start of activities
- %task_finish_date_time% - Finish of activities
- %task_notes% - Notes of activities
- %task_completed% - Completed of activities
- %task_physical_metric% - Unit of deliverable activities
- %task_physical_norm% - Norm of deliverable activities
- %task_physical_volume% - deliverable activities
- %task_labour_intensity% - effort of activities
- %task_duration% - Duration of activities

Submit
Cancel

After double-clicking an appointment in the Outlook calendar

new_software development process						
29 Mo	1 Di	2 Mi	3 Do	4 Fr	5 Sa	6 So
non-deliverable		15:00	system design; new_software development process Bis 9. Mrz →			
11:00 analysis of user input; new_software d		15:00				
		15:00	software requirements analysis; new_software development process Bis 8. Mrz →			
		15:00	operational concept; new_software development process Bis 8. Mrz →			
		15:00	system requirements; new_software d 14:00			

this information is visible.



Retention periods

Here you define when projects, project revisions, and resource pool revisions marked for deletion should be permanently deleted.

Client

[Main](#)
[Project settings](#)
[iCalendar](#)
[Retention period](#)
[Import System](#)
[Timeline](#)
[Vacation](#)

Delete project revision
at the end of 300 days

Delete resource pool revision
at the end of 500 days

Delete projects are marked for deletion
at the end of 1 days

Submit Cancel

Note

- A folder is only permanently deleted once all projects it contains have been permanently deleted after the retention period.
- Permanently deleted projects/folders cannot be restored.
- Returning to a deleted revision (project/resource pool) is not possible.

Project Import

Client

< Retention period Import System Vacations import Timeline Vacation planning DMS >

Project View:

Level1 View:

Level2 View:

Level3 View:

Level4 View:

Submit Cancel

Timeline

On the Timeline tab you define which project information is passed on to the timeline.

Client

Main
Project settings
iCalendar
Retention period
Import System
Timeline
Vacation

Title:
%project_name% %task_name%

Description:
%task_employees% %task_user_field0% %task_notes%

Parameter:
%task_start_date_time% - start date of activity
%task_finish_date_time% - end date of the activity
%task_notes% - notes of activity
%task_completed% - completed percentage of the activity
%task_physical_metric% - unit of the deliverable of the activity
%task_physical_norm% - norm of the deliverable of the activity
%task_physical_volume% - deliverable activity
%task_labour_intensity% - effort of activity
%task_duration% - duration of the activity
%task_extra_cost% - fixed costs of activity
%task_payment_cost% - amount for the period of the activity
%task_payment_delay% - payment period for the date of payment for the activity
%task_payment_date% - date of the receipt of the payment for the activity
%task_user_field0% - activity's user-defined field 1
%task_user_field1% - activity's user-defined field 2
%task_user_field2% - activity's user-defined field 3
%task_user_field3% - activity's user-defined field 4
%task_user_field4% - activity's user-defined field 5
%task_user_field5% - activity's user-defined field 6
%task_user_field6% - activity's user-defined field 7
%task_user_field7% - activity's user-defined field 8
%task_user_field8% - activity's user-defined field 9
%task_user_field9% - activity's user-defined field 10

Submit
Cancel

Vacation planning

Here you define how non-working days are synchronized between Rillsoft Integration Server (Rillsoft Cloud) and, if applicable, Rillsoft Project. If a project planner has already defined employees' non-working days in the Rillsoft Project client itself, you can choose one of two variants here:

- either add and combine the non-working days from the Rillsoft Project resource pool
- or discard the non-working days from the Rillsoft Project resource pool and only consider the non-working days from Rillsoft Integration Server (Rillsoft Cloud)

You can also define the general number of vacation days per year for the company here.

Client

< Retention period
Import System
Vacations import
Timeline
Vacation planning
DMS
>

Synchronization:
Combine with the resource pool

Vacation days:
Replace in resource pool
Combine with the resource pool

Combine vacation days from the Rillsoft Integration Server and the resource pool of Rillsoft Project

Replace vacation days in the Rillsoft Project resource pool with vacation days from the Rillsoft Integration Server

Submit
Cancel

Vacation Import

Client

Folder Retention period Import System Timeline Vacation planning **Vacations import**

Employees table/view:

Users table/view:

Submit Cancel

Related topics

- [New client](#)
- [Delete a client](#)
- [Manage clients](#)

Portfolio structure hierarchy of a client

Goal: you organize a client's portfolio structure (folders) and set time limits for e-mail notifications.

Prerequisite: you are logged in as administrator.

Step by step

1. Select **Administration > Clients**.
2. Click the **Folder** button

Client list

+ Create

Filter:

Login

Actions	Company Name
      	Mein Mandant
      	EN_2016
      	New Client 2016

to open the client's portfolio structure.

Directory list

Client:

Login

Folder Structure	Actions	Email Notification	Project Count	Description
▼  Root Folder	   	1/7/7/7/2/	0	
 2016	   	1/7/7/7/2/	5	
 Template	   	1/7/7/7/2/	1	
 2011	   	1/7/7/7/2/	2	
 test	   	1/7/7/7/2/	4	
 Other	   	1/7/7/7/2/	1	

3. Drag a folder to the preferred position via **Drag & Drop**.

Check the result

The client's portfolio structure shows the new arrangement. In addition, the following functions are available:

Actions

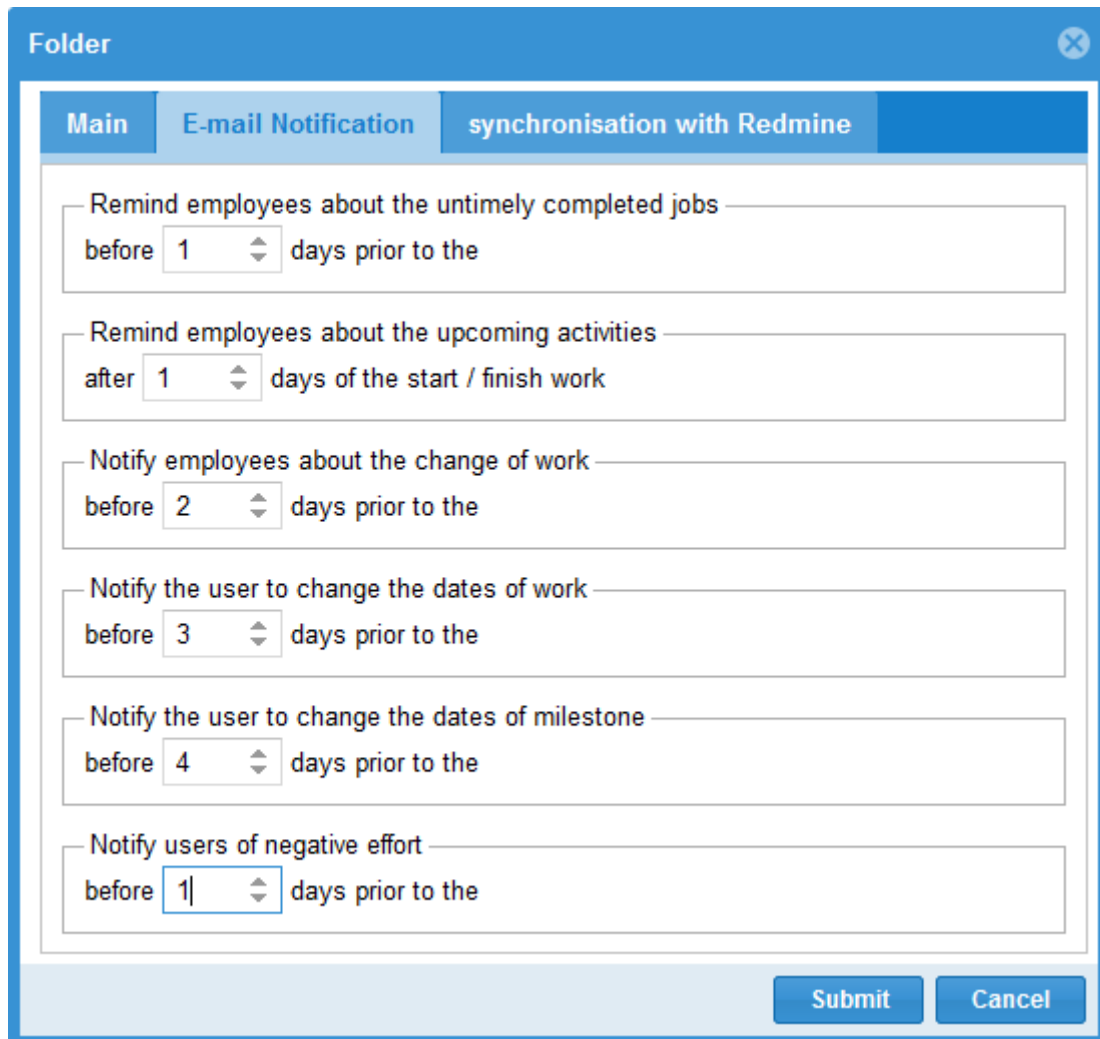
-
-  **Change the name and description of the folder / Define time limits for e-mail notification**
 -  **Delete folder**
 -  **Create a new subfolder**
 -  **Change access rights for the folder**
-

Tip! A yellow key indicates that some of the existing folder roles are assigned to the folder (Folder structure column). A gray key indicates that the access rights for the folder were taken from the root folder.

Time limits for e-mail notification

Goal: you define when which e-mail notification is sent for a folder.

1. Click the **Note with a pen** button.



The 'Folder' dialog box has three tabs: 'Main', 'E-mail Notification', and 'synchronisation with Redmine'. The 'E-mail Notification' tab is active. It contains six notification settings, each with a 'before' label, a spinner box for days, and a 'days prior to the' label.

Notification	Days prior to the
Remind employees about the untimely completed jobs	1
Remind employees about the upcoming activities	1
Notify employees about the change of work	2
Notify the user to change the dates of work	3
Notify the user to change the dates of milestone	4
Notify users of negative effort	1

At the bottom right are 'Submit' and 'Cancel' buttons.

2. Set a period (in days) for the respective notification.

The **E-mail notification** column shows all time limits.

Directory list				
Client: EN_2016		Login		
Folder Structure	Actions	Email Notification	Project Count	Description
▼ Root Folder	   	1/7/7/7/2/	0	
2016	   	1/7/7/7/2/	5	
Template	   	1/7/7/7/2/	1	
2011	   	1/7/7/7/2/	2	
test	   	1/7/7/7/2/	4	
Other	   	1/7/7/7/2/	1	

Remind employees about untimely completed jobs that were due X days ago.

If this option is on, e-mails are sent to the employees assigned to the activities when:

- the activity start lies within the period from the current date minus X (e.g. 2) days, and the completion percentage for this activity is 0.
- the activity end lies within the period from the current date minus X (e.g. 2) days, and the completion percentage for this activity is less than 100.

Remind employees about upcoming activities that start in X days. If this option is on, e-mails are sent to employees whose activities start within the period from the current date plus X (e.g. 3) days. Example: if today is July 15 and 3 days are entered, the period runs from July 15 to July 18.

Notify employees about the change of work for activities within X days. If this option is on, e-mails are sent to employees whose activities, lying within the period from the current date plus X (e.g. 1) day, have had a date change.

Notify users about the change of work for activities within X days. If this option is on, e-mails are sent to users who have subordinate employees assigned to activities lying within the period from the current date plus X (e.g. 7) days. You define subordinate employees under **Administration > Users**, column **Actions**, button  — the **Filter** field must remain empty.

Notify users about the change of milestone dates within X days. If this option is on, e-mails are sent to users when milestone dates have been shifted.

Caution! The first e-mail notification lists all activities from the project start up to the cutoff date (e.g. July 17). After that, only new activities are added — if an employee has already been notified about an activity, they will not be notified again on the next e-mail, even if the activity is still within the defined period.

Related topics

- [Folders](#) — comparable functions via **Administration > Folders**
- [Folder roles](#)
- [E-mail templates list](#)

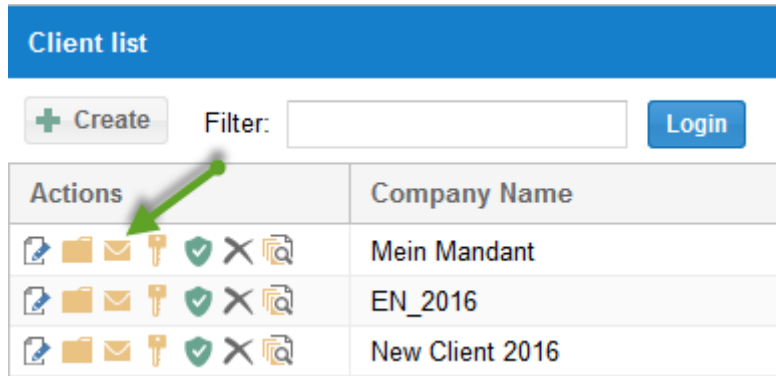
E-mail templates list

Goal: you manage a client's e-mail templates, which Rillsoft Integration Server uses to send notifications automatically.

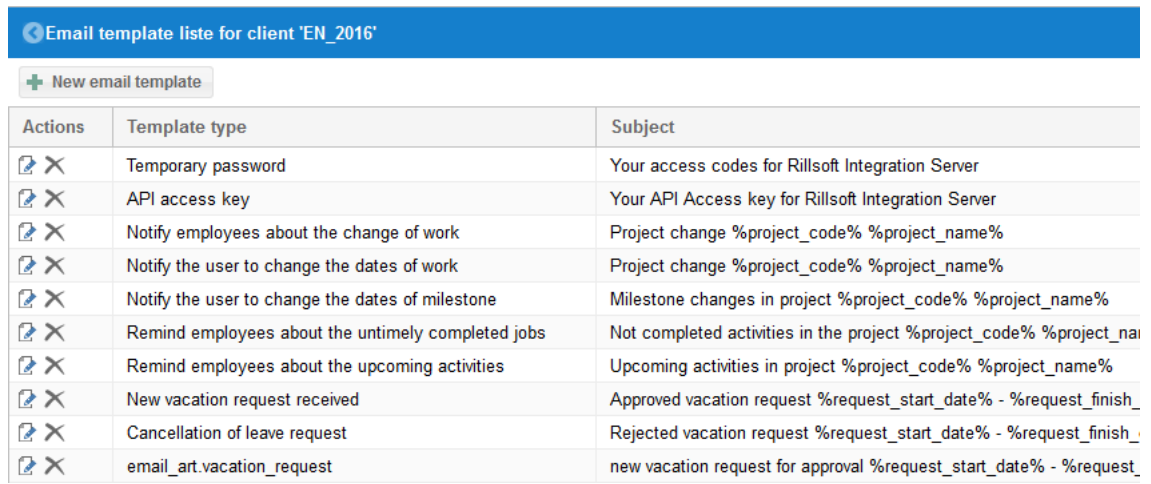
Prerequisite: you are logged in as administrator.

Step by step

1. Select **Administration > Clients**.
2. Click the **Mail** button



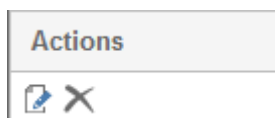
to open the e-mail templates list for the client.



- Optionally, use the **New e-mail template** button (if available) to create your own e-mail template.

Check the result

In the **Actions** column



you find two icon buttons for editing and deleting the predefined templates.

Types of e-mail templates

- Temporary password — templates for users' login credentials.
- API access key — templates for users' API access keys. You need an API access key for modules such as iCalendar, Timeline, Redmine, Vacation Planning, SAP, etc.
- Notify employees about the change of work
- Notify users about the change of work
- Notify users about the change of milestone dates
- Notify users about negative effort

- Remind employees about upcoming activities
- Remind employees about untimely completed jobs
- Vacation planning — approval of vacation request
- Vacation planning — cancellation of vacation request
- Vacation planning — new vacation request received
- Vacation planning — cancellation of vacation request received
- Timesheet — new confirmation received
- Timesheet — new effort change received
- Warning for conflicts in the cross-project links

Tip!

1. Depending on the type of e-mail template, different project information is available in the **Parameters** field.
2. In all templates, the subject and text content can be freely defined using the parameters available for that template.

Edit a template

After clicking the **Note with a pen** button



you can edit an e-mail template.

E-mail template

Template Type:

Temporary password

Thema:

Your access codes for Rillsoft Integration Server

Content:

Helvetica

B I U T⁺ T⁻ T₊ T₋

Dear %user_first_name% %user_last_name%,

in this email is your username and temporary password to log in Rillsoft Integration Server.

username: %user_username%

password: %user_password%

Best regards

Parameters:

%user_username% - Login of the user

%user_firstname% - The user's first name

%user_lastname% - The user's last name

%user_email% - Email of the user

%user_password% - Temporary user's password

Submit

Cancel

Related topics

- [Portfolio structure hierarchy of a client](#) — time limits for e-mail notifications per folder
- [Manage clients](#)

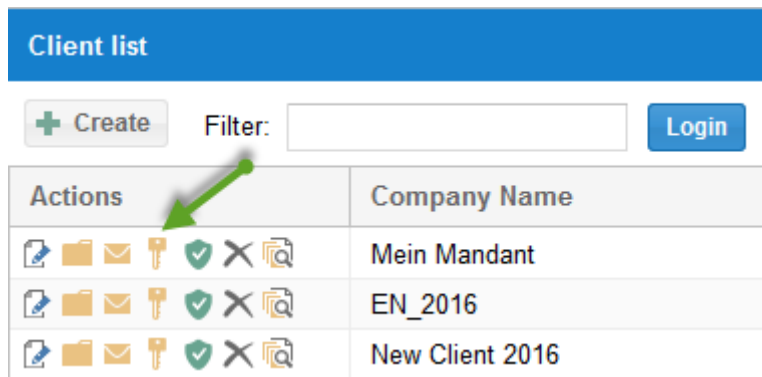
Client's user list

Goal: you see all users of a client and their roles at a glance.

Prerequisite: you are logged in as administrator.

Step by step

1. Select **Administration > Clients**.



2. In the row of the desired client, click the **Key** icon button.

Check the result

You get a user list of the client with the assigned roles.

The user of client: Produktion										
Name	User role							Folder role		
	Administrator	Mandant Administrator	Projektmanager	Projektbenutzer	iCalendar Nutzer	Urlaubsplanung Nutzer	Urlaubsplanung Vorgesetzter	Root-Verzeichnis Administrator	Root-Verzeichnis Manager	Root-Verzeichnis Benutzer
Niko Schwarz...	-	-	-	-	-	-	-	-	-	-
Uwe Weissmann	-	-	-	-	-	-	-	-	-	-
Thomas Orden...	-	-	-	-	-	-	-	-	-	-
Martin Muster...	-	✓	✓	-	✓	✓	✓	✓	✓	✓
Udo Schwarz	-	-	-	-	-	-	-	-	-	-
Bodo Fleissig	-	-	-	-	-	-	-	-	-	-
Andreas Weiss	-	-	-	-	-	-	-	-	-	-
Admin Admin...	✓	✓	✓	✓	✓	✓	✓	✓	✓	-

If the icons in the list are not grayed out, you can change them directly.

Related topics

- [Clients](#)
- [Manage users and permissions](#)

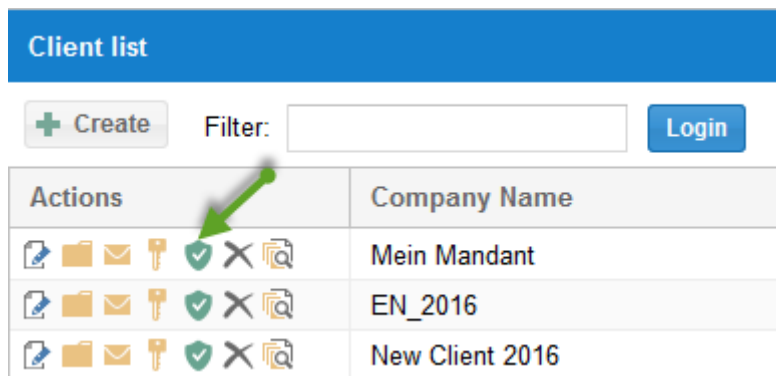
Floating licenses of a client

Goal: you assign a floating license to a client's users.

Prerequisite: the floating license must be activated first. If you have floating licenses, you can assign them to users.

Step by step

1. Select **Administration > Clients**.
2. Click the **Shield** button.



3. Mark the license for the users who are allowed to work with it.

Floating licenses of the client: Maschinenbau

+ New floating license
Filter:
Login

Name	
Admin Admin...	-
Allo Babo	-
Adalbot Carr2	✓
David Zuverlae...	-
Bodo Fleissig	-
И.И. Иванов	-
Martin Muster...	-
Hugo Ordentlich	-
Udo Schwarz	-
Niko Schwarz...	✓

Check the result

The marked users can work with the floating license.

Add a new floating license

You add a new floating license via the following button:

Floating licenses of the client: Maschinenbau

+ New floating license
Filter:
Login

Related topics

- [Clients](#)
- [Floating licenses in detail](#)

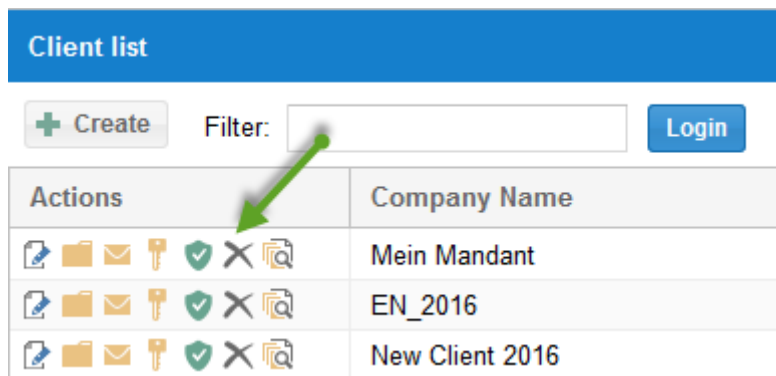
Delete a client

Goal: you delete a client.

Prerequisite: you are logged in as administrator.

Step by step

1. Select **Administration > Clients**.
2. Click the button



to delete the client.

Check the result

The client no longer appears in the client list.

Related topics

- [New client](#)
- [Resource pool versions of a client](#)

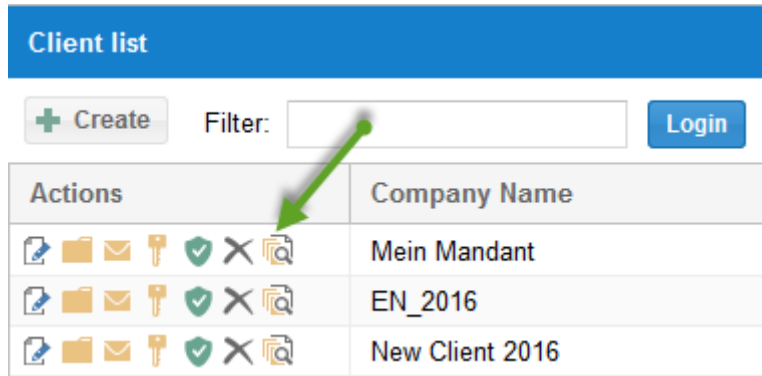
Resource pool versions of a client

Goal: you see all resource pool revisions of a client and restore an earlier version if needed.

Prerequisite: you are logged in as administrator.

Step by step

1. Select **Administration > Clients**.
2. Click the button



Check the result

You get all resource pool revisions of the client listed.

Resource pool revision history: EN_2016			
Actions	Revision	Lock at	User
	93	2016-03-04 13:03:59	Admin AdminMan
	92	2016-03-04 13:01:44	Admin AdminMan
	90	2016-03-04 12:59:31	Admin AdminMan
	78	2016-03-04 12:53:32	Admin AdminMan
	76	2016-02-22 12:43:15	Admin AdminMan
	73	2016-02-17 18:54:42	Admin AdminMan
	72	2016-02-17 09:13:50	Admin AdminMan
	70	2016-02-16 14:44:30	Admin AdminMan
	68	2016-02-16 14:42:19	Admin AdminMan
	67	2016-02-15 15:35:46	Admin AdminMan
	66	2016-02-15 15:27:30	Admin AdminMan
	51	2016-02-15 15:08:52	Admin AdminMan

Restore a resource pool version

To return to a selected resource pool version, click the button .

Related topics

- [Clients](#)
- [Delete a client](#)

3.1.2 Client release

Goal: you check and set whether a user is generally allowed to work with a client.

Prerequisite: you are logged in as administrator.

3.1.2.1 Step by step

1. Select **Administration > Client release**.

Client Access List									
Filter:				Login					
Name	Dummy	Maschinenbau	Beispiel_2014	D_2014	MA_2013	MA_2014	609	Mein Mandant	Mandant AA
Admin Admin...	-	✓	-	-	-	-	-	✓	-
Martin Muster...	-	-	-	-	-	-	-	-	-
Bodo Fleissig	-	-	-	-	-	-	-	-	-
Udo Schwarz	-	-	-	-	-	-	-	-	-
Andreas Weiss	-	-	-	-	-	-	-	-	-
Niko Schwarz...	-	✓	-	-	-	-	-	-	-
Adalbot Carr2	-	✓	-	-	-	-	-	-	-
Allo Babo	-	✓	-	-	-	-	-	-	-

2. In the matrix of clients (columns) and users (rows), click the icon button in the desired cell to release a user for a client.

3.1.2.2 Check the result

The view gives a quick overview of which users have access rights for which clients.

Note: Only on this page can you release a user for a client. A client release alone is not yet enough for access to client information such as the resource pool, projects, or portfolio.

Important! In addition to the general release for a client, you must also assign the user the corresponding folder and user roles.

3.1.2.3 Related topics

- *Clients*
- *Manage users and permissions*

3.1.3 Organization chart

Goal: you arrange the hierarchical structure of users for administration, timesheet, and vacation planning.

Prerequisite: you are logged in as administrator.

This hierarchy is relevant for administration, e-mail notifications, timesheet, iCalendar, timeline, and vacation planning. It shows all users listed by hierarchy. There are three types of organization chart:

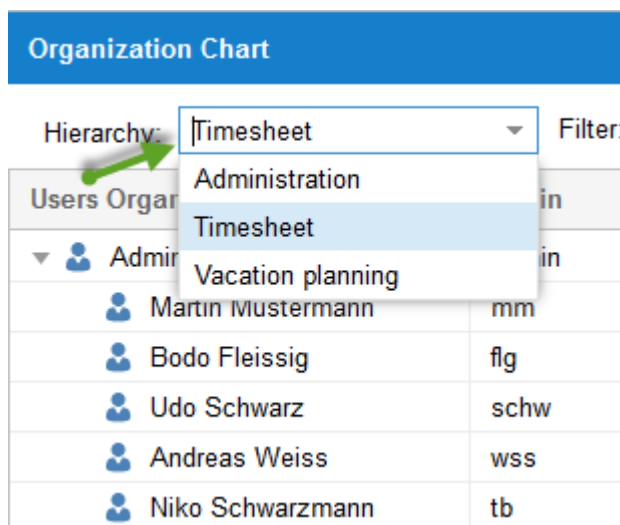
- Administration (e-mail notification, iCalendar, timeline)
- Timesheet
- Vacation planning

3.1.3.1 Step by step

1. Select **Administration > Organization chart**.

Organization Chart						
Hierarchy: Timesheet		Filter:		Login		
Users Organization Chart	Login	Email	Phone	Mobile	Create At	Last Visit
▼ Admin AdminMan	admin	info@rillsoft.de			2014-06-22 10:06:30	2016-03-09 15:41:17
Martin Mustermann	mm	mm@gmx.de			2014-06-22 10:13:35	
Bodo Fleissig	flg	flg@gmx.de			2014-06-23 11:19:43	
Udo Schwarz	schw	schw@gmx.de			2014-06-23 11:19:51	
Andreas Weiss	wss	wss@gmx.de			2014-06-23 11:19:53	
Niko Schwarzmann	tb	tb@rillsoft.de			2014-06-23 11:19:56	2016-01-05 15:31:08
Adalbot Carr2	carr	adalbot.carr@rillsoft.de			2014-09-23 10:18:44	
Allo Babo	babo	allo.babo@rillsoft.de			2014-10-14 12:31:17	
David Zuverlaessig	dazu	dazu@gmx.de			2015-07-16 12:55:25	

2. In the **Administration** field, select the desired organization chart type.



3. Change the arrangement via **Drag & Drop**.

3.1.3.2 Check the result

The new hierarchy is visible in the selected organization chart type and affects the associated notifications and releases.

3.1.3.3 Related topics

- [Clients](#)
- [Manage clients](#)

3.1.4 Folders

Goal: you organize the client's portfolio structure (folders) and manage time limits for e-mail notifications, new subfolders, and access rights.

Prerequisite: you are logged in as administrator.

3.1.4.1 Step by step

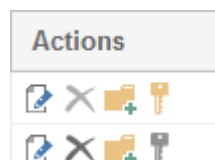
1. Select **Administration > Folders**.

Directory list				
Client: EN_2016		Login		
Folder Structure	Actions	Email Notification	Project Count	Description
▼ Root Folder		1/7/7/7/2/	0	
2016		1/7/7/7/2/	5	
Template		1/7/7/7/2/	1	
2011		1/7/7/7/2/	2	
test		1/7/7/7/2/	4	
Other		1/7/7/7/2/	2	

2. Drag a folder to the preferred position via **Drag & Drop**.

3.1.4.2 Check the result

The folder structure shows the new arrangement. In addition, the following functions are available:

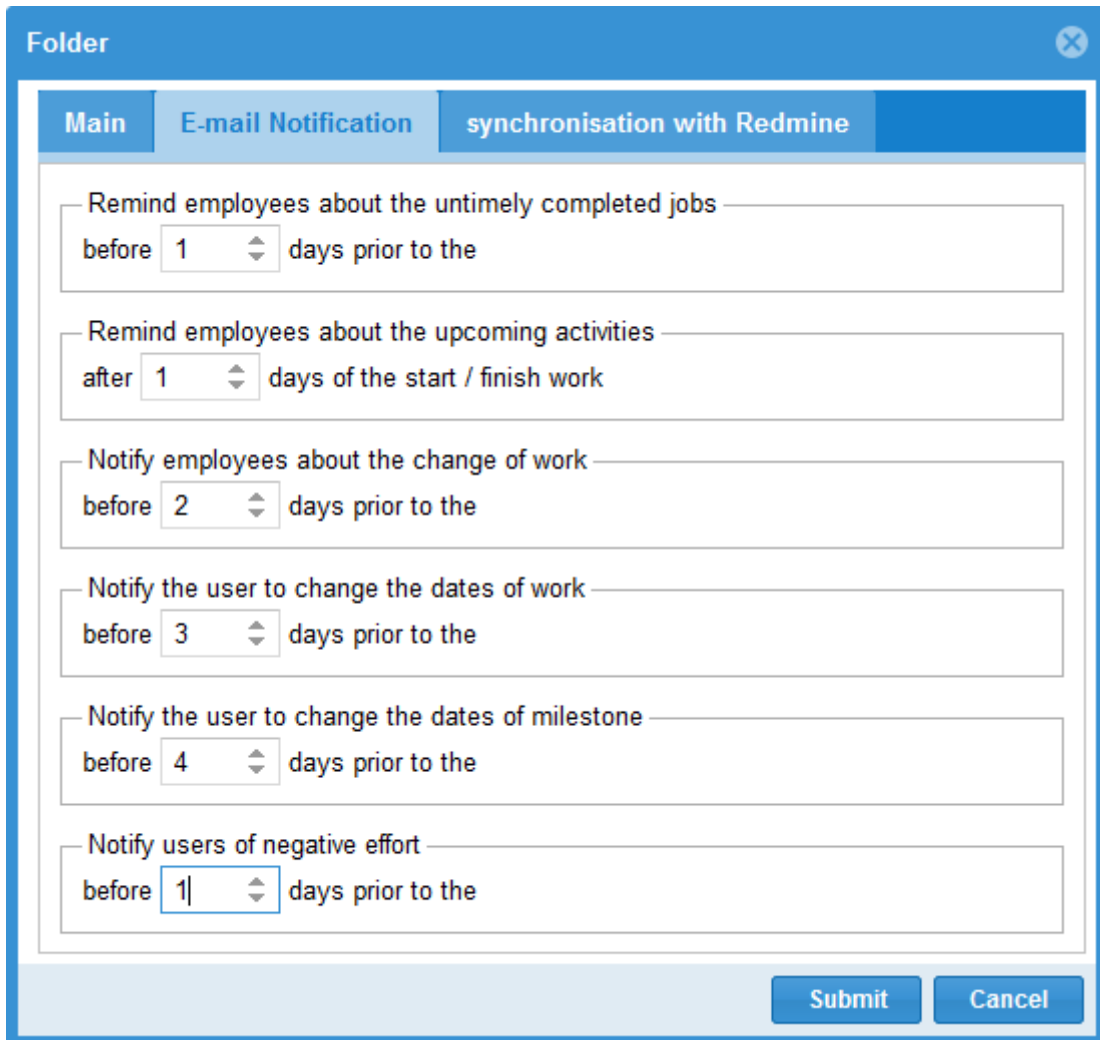


-
-  Change the name and description of the folder / Define time limits for e-mail notification
 -  Delete folder
 -  Create a new subfolder
 -  Change access rights for the folder
-

Tip! A yellow key indicates that some of the existing folder roles are assigned to the folder (Folder structure column). A gray key indicates that the access rights for the folder were taken from the root folder.

3.1.4.3 Time limits for e-mail notification

1. Click the **Note with a pen** button.



Folder

Main **E-mail Notification** synchronisation with Redmine

Remind employees about the untimely completed jobs —
before 1 days prior to the

Remind employees about the upcoming activities —
after 1 days of the start / finish work

Notify employees about the change of work —
before 2 days prior to the

Notify the user to change the dates of work —
before 3 days prior to the

Notify the user to change the dates of milestone —
before 4 days prior to the

Notify users of negative effort —
before 1 days prior to the

Submit Cancel

2. Set a period (in days) for the respective notification.

The **E-mail notification** column shows all time limits.

Directory list				
Client: EN_2016		Login		
Folder Structure	Actions	Email Notification	Project Count	Description
▼ Root Folder	   	1/7/7/7/2/	0	
2016	   	1/7/7/7/2/	5	
Template	   	1/7/7/7/2/	1	
2011	   	1/7/7/7/2/	2	
test	   	1/7/7/7/2/	4	
Other	   	1/7/7/7/2/	1	

Remind employees about untimely completed jobs that were due X days ago. If this option is on, e-mails are sent to the employees assigned to the activities when:

- the activity start lies within the period from the current date minus X (e.g. 2) days, and the completion percentage for this activity is 0.
- the activity end lies within the period from the current date minus X (e.g. 2) days, and the completion percentage for this activity is less than 100.

Remind employees about upcoming activities that start in X days. If this option is on, e-mails are sent to employees whose activities start within the period from the current date plus X (e.g. 3) days. Example: if today is July 15 and 3 days are entered, the period runs from July 15 to July 18.

Notify employees about the change of work for activities within X days. If this option is on, e-mails are sent to employees whose activities, lying within the period from the current date plus X (e.g. 1) day, have had a date change.

Notify users about the change of work for activities within X days. If this option is on, e-mails are sent to users who have subordinate employees assigned to activities lying within the period from the current date plus X (e.g. 7) days. You define subordinate employees under **Administration > Users**, column **Actions**, button  — the **Filter** field must remain empty.

Notify users about the change of milestone dates within X days. If this option is on, e-mails are sent to users when milestone dates have been shifted.

Notify users about negative effort within X days. This option is only relevant and available for schedule-driven planning. If it is on, e-mails are sent to users when employees assigned to activities have non-working days and no replacement personnel resources have been assigned to the activities on those days.

Caution! The first e-mail notification lists all activities from the project start up to the cutoff date (e.g. July 17). After that, only new activities are added — if an employee has already been notified about an activity, they will not be notified again on the next e-mail, even if the activity is still within the defined period.

3.1.4.4 Delete a folder

Click the icon button .

3.1.4.5 Create a new subfolder

1. Click the icon button .
2. Click the icon button  in the row of the new folder and enter a name and description for it.

3.1.4.6 Change access rights for a folder

1. Click the icon button .
2. Change the access rights.

Folder role																			
 Create		Client:	EN	Folder:	Root Folder														
Actions	Name	Folder				Project						Notification				Tim...	A		
		Create folder	Change folder	Delete folder	Restore deleted folder	Create project	Read project	Change project	Delete project	Restore project	Lock project	Unlock project	Watch project changes	Watch milestone changes	Watch negative effort	Watch cross project link	Enter timesheet	Accept timesheet	API access
 	Root-Verzeichnis Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
 	Root-Verzeichnis Manager	-	-	-	-	✓	✓	✓	-	-	✓	-	-	-	-	-	✓	-	✓
 	Root-Verzeichnis Benutzer	-	-	-	-	✓	-	-	-	-	-	-	-	-	-	-	✓	-	✓

Note: access rights on the root folder also apply to subfolders, unless defined otherwise.

3.1.4.7 Related topics

- [Folder roles](#)
- [Portfolio structure hierarchy of a client](#) — comparable functions via **Administration > Clients**
- [Manage clients](#)

3.1.5 Folder roles

Goal: you define which access rights a folder role has for a client's folder.

Prerequisite: you are logged in as administrator. Folder roles and their access rights depend on client and folder.

3.1.5.1 Step by step

1. Select **Administration > Folder roles**.

Folder role																			
+ Create		Client:	EN	Folder:	Root Folder	Apply													
Actions	Name	Folder				Project						Notification				Tim...	A		
		Create folder	Change folder	Delete folder	Restore deleted folder	Create project	Read project	Change project	Delete project	Restore project	Lock project	Unlock project	Watch project changes	Watch milestone changes	Watch negative effort	Watch cross project link	Enter timesheet	Accept timesheet	API access
 	Root-Verzeichnis Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
 	Root-Verzeichnis Manager	-	-	-	-	✓	✓	✓	-	-	✓	-	-	-	-	✓	-	✓	✓
 	Root-Verzeichnis Benutzer	-	-	-	-	✓	-	-	-	-	-	-	-	-	-	✓	-	✓	✓

2. For the desired folder of the client, click the **Key** icon button in the corresponding row to set its access rights.

Note: rights assigned to a parent folder apply by default to its subfolders as well.

A dimmed-out tick  indicates that the access rights of the folder role were defined on the parent folder.

3.1.5.2 Check the result

The assigned rights apply to all users with this folder role in the respective folder.

3.1.5.3 Available rights groups

All possible actions are distributed across the following groups:

Folder structure

- Create folder
- Change folder
- Delete folder
- Restore deleted folder

Project

- Create project
- Read project
- Change project
- Delete project
- Restore deleted project
- Lock project
- Unlock project

Email notification

- Watch project changes
- Watch milestone change
- Watch negative effort
- Watch cross-project links

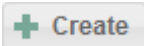
Timesheet

- Enter timesheet
- Accept timesheet

iCalendar & Timeline

- API access — allows access to additional Rillsoft Integration Server modules in the browser window.

3.1.5.4 Create a new folder role

After clicking the button  you can create a new folder role.

3.1.5.5 Edit a folder role

After clicking the icon button  you can change a folder role (name and description).

3.1.5.6 Delete a folder role

After clicking the icon button  you can delete a folder role.

3.1.5.7 Related topics

- [*Folders*](#)
- [*User roles*](#)
- [*Roles and permissions matrix*](#)
- [*Manage users and permissions*](#)

manage clients, organization chart, folders, client, clients, customer, company, create resource pool, it-administration

3.2 Manage users and permissions

This section describes creating and managing users as well as assigning user roles and folder roles, which control which activities and projects are available to a user.

3.2.1 Users

Goal: this page gives an overview of user management — create, change, and delete users, and manage rights, client access, and API access keys per user. Each function is described in detail on the linked subpages.

User List										
+ Create		Filter:		Apply						
Actions	Login	Clients	API key	First Name	Last Name	Email	Phone	Mobile	Create At	Last Visit
    	admin	Dummy, C...		Admin	AdminMan					03/19/2024 18:31...
    	test10	Produktion		Martin	Mustermann	test10@rillsoft.de			07/31/2023 17:28:15	
    	flg	Produktion		Bodo	Fleissig	flg@produktion-betrieb.de			07/31/2023 17:28:17	
    	schw	Produktion		Udo	Schwarz	schw@produktion-betrieb.de			07/31/2023 17:28:20	
    	wss	Produktion		Andreas	Weiss	wss@produktion-betrieb.de			07/31/2023 17:28:21	
    	nschw	Produktion		Niko	Schwarzmann	nschw@produktion_betrieb.de			07/31/2023 17:28:23	
    	uweis	Produktion		Uwe	Weissmann	uweis@produktion_betrieb.de			07/31/2023 17:28:25	
    	thor	Produktion		Thomas	Ordentlich	thor@produktion_betrieb.de			07/31/2023 17:28:26	

All users who are allowed to work with Rillsoft Project via the interface to Rillsoft Integration Server are listed here.

Functions

- Create a user — use the **New user** button to create a new user, see [New user](#).
- Change a user — use the icon button  to change user master data such as name, phone, etc., see [Edit user properties](#).
- Delete a user — use the icon button  to delete a user, see [Delete user](#).
- Manage user rights — use the icon button  to define, per client, which folder and user roles the user belongs to, see [Customize user access rights](#).
- Client sharing for a user — use the icon button  to define which clients the user is allowed to work with, see [Define a user's client access](#).
- Manage resource sharing for timesheets — use the icon button  to mark, in a personnel resource list obtained from the resource pool, the personnel resources the user can enter timesheets for, see [Subordinate personnel resources to a user](#).
- View all information about a user in one place — use the icon button , see [User info](#).

The **API access key** column offers the following options:

-  generate an API access key for a user
-  show the API access key
-  switch to the user's iCalendar

-  switch to the user's timeline
-  send the user an e-mail with their API access key
-  delete a user's API access key

3.2.1.1 See too

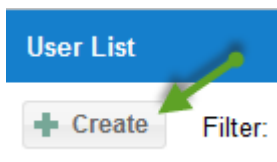
New user

Goal: you create a new user.

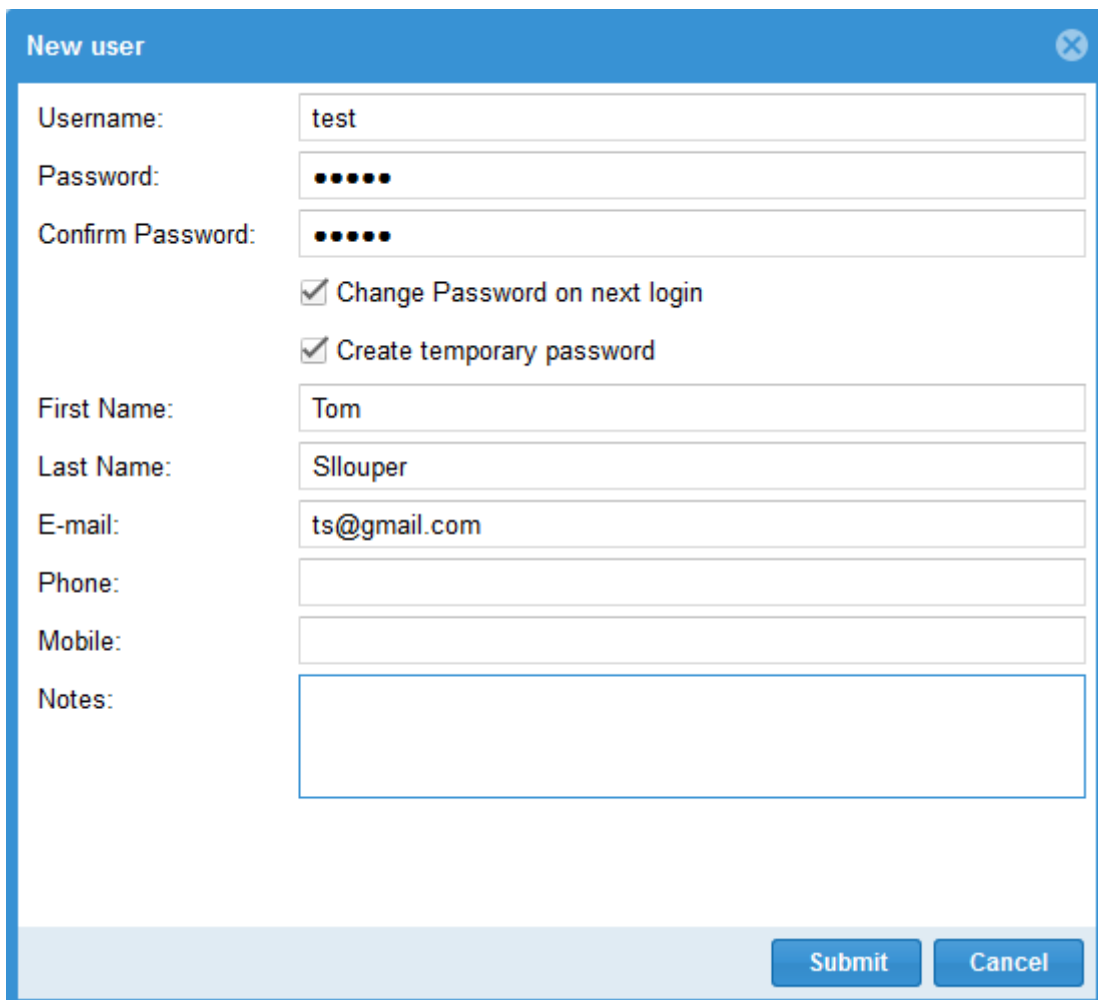
Prerequisite: you are logged in as administrator under **Administration > Users**.

Step by step

1. Click the **New user** button.



2. In the dialog, enter the user's master data and save.



The 'New user' dialog is a blue-bordered window with a close button in the top right. It contains the following fields and options:

- Username:** test
- Password:** masked with dots
- Confirm Password:** masked with dots
- ☒ Change Password on next login
- ☒ Create temporary password
- First Name:** Tom
- Last Name:** Sllouper
- E-mail:** ts@gmail.com
- Phone:** (empty field)
- Mobile:** (empty field)
- Notes:** (empty text area)

At the bottom right, there are 'Submit' and 'Cancel' buttons.

Check the result

The new user appears in the user list under **Administration > Users**.

Next steps: assign the user client access (*Define a user's client access*) and a user role (*Customize user access rights*).

Related topics

- *Users*
- *Edit user properties*
- *Create your first user and assign a role*

Edit user properties

Goal: you edit the master data of an existing user.

Prerequisite: the user already exists, see *New user*.

Step by step

1. In the user list, in the user's row, click the **Pen** button.



2. In the dialog, change the desired properties and save.

New user

Username: test

Password: •••••

Confirm Password: •••••

☒ Change Password on next login

☒ Create temporary password

First Name: Tom

Last Name: Sllouper

E-mail: ts@gmail.com

Phone:

Mobile:

Notes:

Submit Cancel

Check the result

The changed master data appears in the user list under **Administration > Users**.

Related topics

- [Users](#)
- [New user](#)
- [Delete user](#)

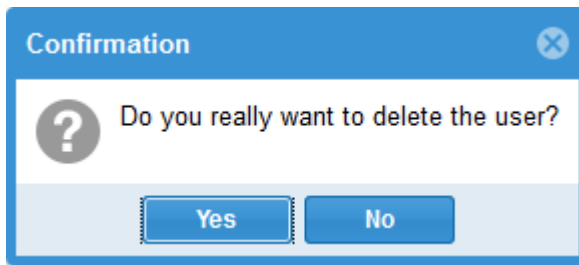
Delete user

Goal: you delete a user.

Prerequisite: you are logged in as administrator under **Administration > Users**.

Step by step

1. In the user's row, click the delete icon button .
2. Confirm the security prompt with **Yes** if needed.



Check the result

The user no longer appears in the active user list under **Administration > Users**.

Related topics

- [Users](#)
- [New user](#)
- [Edit user properties](#)

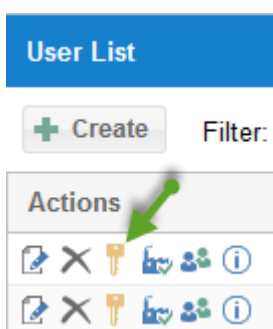
Customize user access rights

Goal: you assign a user the appropriate access rights via user roles and folder roles.

Which information is available to a user, which activities they may carry out, and which projects they may work with is decided by assigning these access rights. You define the rights of user roles under **Administration > User roles**, and the rights of folder roles under **Administration > Folder roles**.

Step by step

1. In the user list, in the **Actions** column



click the button .

2. In the corresponding cell, click  (revoke) or  (grant).

The user's roles: Martin Mustermann										
Client	User role							Folder role		
	Administrator	Mandant Administrator	Projektmanager	Projektbenutzer	iCalendar Nutzer	Urlaubsplanung Nutzer	Urlaubsplanung Vorgesetzter	Root-Verzeichnis Administrator	Root-Verzeichnis Manager	Root-Verzeichnis Benutzer
Produktion	-	✓	✓	-	✓	✓	✓	✓	✓	✓

Rillsoft Integration Server provides two types of roles to configure a user's access rights flexibly and in detail:

- User roles
- Folder roles

User roles

User roles are folder-independent and define access rights for

- the resource pool
- user management
- working with portfolios
- vacation planning
- working with DMS
- the iCalendar and Timeline modules

Folder roles

Projects can be grouped in Rillsoft Integration Server in a multi-stage structure; this structure is available under the **Folders** menu item.

Directory list				
Client: EN_2016		Login		
Folder Structure	Actions	Email Notification	Project Count	Description
▼ Root Folder		1/7/7/7/2/	0	
2016		1/7/7/7/2/	5	
Template		1/7/7/7/2/	1	
2011		1/7/7/7/2/	2	
test		1/7/7/7/2/	4	
Other		1/7/7/7/2/	1	

In addition, folder roles are responsible for access rights to the folders. This lets you determine how (read, change, etc.) and with which projects users may work, by defining the appropriate folder roles for different folders.

Working with portfolios, some e-mail notification functions, timesheets, and iCalendar are also influenced by folder roles, since these relate to projects stored in various folders.

In summary: folder roles are folder-dependent and are responsible for the access rights to the following activities:

- Working with folders
- Working with projects
- E-mail notification
- Timesheet
- iCalendar access

Check the result

For example, user Doe has, for the client Mechanical Engineering:

- the user roles **Project manager**, **iCalendar user**, and access to the timeline module
- the folder role **Root folder user**

Related topics

- [Users](#)
- [User roles](#)
- [Folder roles](#)
- [Roles and permissions matrix](#)
- [Manage clients](#)

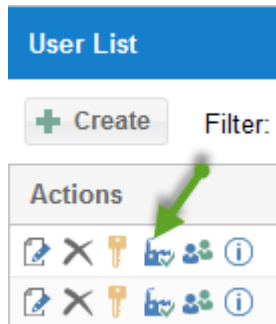
Define a user's client access

Goal: you define which clients a user is allowed to work with.

Prerequisite: the user already exists, see [New user](#).

Step by step

1. Select **Administration > Users**.
2. In the **Actions** column



click the button .

3. In the corresponding cell, click  (revoke) or  (grant).

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ADMINISTRATION

- Users
- Clients
- Organisation chart
- Folders
- Client release
- User roles
- Folder roles

PROJECTS

- Locks
- Projects
- Portfolio
- Links

RESOURCE POOL

- Employees
- Employee role
- Teams

- Calendar
- Dev
- Timesheet

Allocation of personnel resources the user: Martin Mustermann

Client: EN Filter:

Acti...	Start work	First n...	Last name	Email	Code	Team	Qualification
-	12.01	Red	Superman	superman@exampl.com		12.001 South	13.001 manager
✓	13.01	John	Tidy	td@gmail.com		11.001 North - Team A	11.001 programmer - C++
-	13.02	John	Tidy	td@gmail.com		11.001 North - Team A	11.003 programmer - V.Basic
-	14.01	Bill	Diligent	dlg@gmail.com		13.001 East	11.003 programmer - V.Basic
✓	14.02	Bill	Diligent	dlg@gmail.com		13.001 East	11.002 programmer - PHP
-	15.01		Goeslike	goeslike@exampl.com		12.001 South	16.001 support
-	15.02		Goeslike	goeslike@exampl.com		12.001 South	12.001 writer

Alternatively, you can

- select the menu item **Administration > Client release**
- to release the client for several users at once.

Check the result

The released client appears in the user's client access list; the user can now work with its resource pool and projects.

Related topics

- [Users](#)
- [Customize user access rights](#)
- [Manage clients](#)

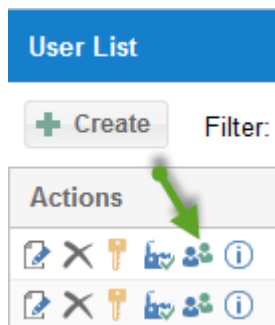
Subordinate personnel resources to a user

Goal: you subordinate personnel resources to a user so they can enter working times or vacation requests on their behalf.

Not all personnel resources need to be entered as users in Rillsoft Integration Server. Even so, relevant scheduling information such as worked hours or vacation requests for these individuals can be entered by other users — for this, you subordinate the corresponding personnel resources to a user.

Step by step

1. Select **Administration > Users**.
2. In the **Actions** column



click the resource button .

3. In the list that opens, assign or remove the desired personnel resource using the  symbol.

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ADMINISTRATION

Users

Client

Client release

Organisation chart

User roles

Folders

Folder roles

PROJECTS

Locks

Projects

Portfolio

Links

RESOURCE POOL

Employees

Employee role

Teams

Calendar

Dev

Timesheet

Allocation of personnel resources the user: Martin Mustermann

Client: Filter:

Acti...	Start work	First n...	Last name	Email	Code	Team	Qualification
-	12.01	Red	Superman	superman@exampl.com		12.001 South	13.001 manager
-	13.01	John	Tidy	td@gmail.com		11.001 North - Team A	11.001 programmer - C++
-	13.02	John	Tidy	td@gmail.com		11.001 North - Team A	11.003 programmer - V.Basic
-	14.01	Bill	Diligent	dlg@gmail.com		13.001 East	11.003 programmer - V.Basic
-	14.02	Bill	Diligent	dlg@gmail.com		13.001 East	11.002 programmer - PHP
-	15.01		Goeslike	goeslike@exampl.com		12.001 South	16.001 support
-	15.02		Goeslike	goeslike@exampl.com		12.001 South	12.001 writer
-	16.01		Sleeper	slp@gmail.com		14.001 West	11.001 programmer - C++
-	16.02		Sleeper	slp@gmail.com		14.001 West	14.001 designer
-	17.01		Eager	eag@gmail.com		11.001 North - Team A	15.001 analyst
-	17.02		Eager	eag@gmail.com		11.001 North - Team A	11.001 programmer - C++
-	18.01		Slow	slw@gmail.com		12.001 South	11.001 programmer - C++
-	19.01		Fast			13.001 East	11.001 programmer - C++

Check the result

The assigned personnel resources appear in the user's list; they can enter working times and vacation requests for them.

Related topics

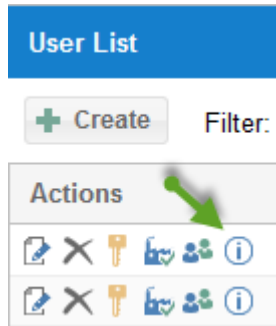
- [Users](#)
- [Define a user's client access](#)
- [Resource pool and teams](#)

User info

Goal: you view all information about a user — access rights, subordinate employees, and API access key — collected in three tabs.

Step by step

1. Select **Administration > Users**.
2. In the **Actions** column



click the button  .

Check the result

User info opens with the following tabs:

Access rights for user roles

Here you find summarized information on whether the user is allowed to work with portfolios, the resource pool, and add-on modules.

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ADMINISTRATION

Users

Clients

Client release

Organisation chart

User roles

Folders

Folder roles

PROJECTS

Locks

Projects

Portfolio

Links

Client:

User: goeslike

Access rights for user roles

Permissions for directory roles

Subordinate staff

Assigned roles

▼

Key icon

User

✓

Send e-mail

▼

Key icon

Portfolio

✓

Read portfolio

✓

Create portfolio

✓

Change portfolio

✓

Delete portfolio

✓

Create cross-project links

✓

Change cross-project links

✓

Delete cross-project links

▼

Key icon

Resource pool

✓

Read resource pool

✓

Change resource pool

✓

Lock resource pool

▼

Key icon

Vacation

—

No permission available

Access rights for folder roles

This tab shows which folders — and therefore which projects — the user is allowed to work with, and which activities they can carry out.

3.2. Manage users and permissions

58

User: goeslike																	
Access rights for user roles				Permissions for directory roles				Subordinate staff									
Directory structure				Folder				Project									
				Create folder	Change folder	Delete folder	Restore deleted folder	Create project	Read project	Change project	Delete project	Restore project	Lock project	Unlock project	Watch project changes	Watch milestone changes	Watch cross project link
																Enter timesheet	Accept timesheet
																	API access
▼ Root Folder				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓
2016				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓
Template				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓
2011				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓
test				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓
Other				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓

Subordinate employees

This tab shows for which employees, and in which areas, the user is allowed to enter timesheets and vacation planning.

User: goeslike							
Access rights for user roles		Permissions for directory roles		Subordinate staff			
First name	Last name	Email	Code	Start work	Team	Qualification	Notes
▼ AdminHierarchy							
	Goeslike	goeslike@exampl.com		15.01 15.02	South South	16.001 support 12.001 writer	
▼ TimesheetHierarchy							
	Goeslike	goeslike@exampl.com		15.01 15.02	South South	16.001 support 12.001 writer	
▼ VacationHierarchy							
	Goeslike	goeslike@exampl.com		15.01 15.02	South South	16.001 support 12.001 writer	

Create an API access key

An API access key is important for the iCalendar and timeline modules.

1. In the **API access key** column, click  to create an API access key for the user.

User List				
+ Create Filter: Login				
Actions	Login	API key	First Name	Last Name
    	admin	    	Admin	AdminMan
    	mm	    	Martin	Mustermann
    	flg	    	Bodo	Fleissig
    	schw		Udo	Schwarz

2. Afterwards, five icon buttons appear in this column:

-  — delete key
-  — display key
-  — generate URL for the user's iCalendar
-  — generate URL for the user's timeline
-  — send the API access key by e-mail

User List					
+ Create Filter: Login					
Actions	Login	API key	First Name	Last Name	Email
    	admin	    	Admin	AdminMan	info@rillsoft.de
    	mm	    	Martin	Mustermann	mm@gmx.de
    	flg	    	52aba507b545d1b5be6bbb81fcae38c	flg	flg@gmx.de
    	schw		Udo	Schwarz	schw@gmx.de

Related topics

- [Users](#)
- [Customize user access rights](#)
- [Subordinate personnel resources to a user](#)

3.2.2 User roles

Goal: you get to know the predefined user roles and, if needed, create your own user role.

Rillsoft Integration Server provides seven predefined user roles for working with user management, project portfolio, resource pool, and add-on modules such as iCalendar.

Permission for user roles																																																																																																																																																																																																																																																																																																											
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Actions	Name																																																																																																																																																																																																																																																																																																										
		User													Portfolio				Resource pool		Vacation		iCalendar		DMS																																																																																																																																																																																																																																																																																		
		Change client	Client release	Create user	Modify user	Delete user	Restore deleted user	Change organization chart	User rights management	Associate users with the human resources	Create roles	Change roles	Delete roles	Access rights to user roles	Permit folder	Manage license	Create license	Delete license	Unlock license	Manage e-mail-template	Eventlog read	LDAP synchronization	Regime synchronization	Read portfolio	Create portfolio	Change portfolio	Delete portfolio	Create cross-project links	Change cross-project links	Delete cross-project links	Read resource pool	Change resource pool	Lock resource pool	Unlock resource pool	Account modify	Create vacation	Accept vacation	Cancel vacation	Create sick leave	Read user calendar	Read secondary user calendar	Read client calendar	Read project calendar	Read portfolio calendar	Create documents	Read documents	Modify documents	Delete documents	Restore deleted documents	Change Folder structure																																																																																																																																																																																																																																																									
	Administrator																																																																																																																																																																																																																																																																																																										

- Assign personnel resources
- Create roles
- Change roles
- Delete roles
- Access rights for user roles
- Access rights for folder roles
- Manage licenses
- Create licenses
- Delete licenses
- Unlock license
- Manage e-mail templates
- Read event log
- Redmine synchronization
- LDAP synchronization

Work with portfolio

- Read portfolio
- Create portfolio
- Change portfolio
- Delete portfolio
- Create cross-project links
- Change cross-project links
- Delete cross-project links

Manage resource pool

- Read resource pool
- Change resource pool
- Lock resource pool
- Unlock resource pool

Vacation planning

- Change vacation account
- Enter vacation
- Accept vacation
- Cancel vacation
- Enter sick leave

Work with the additional iCalendar and Timeline modules

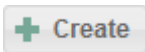
- Read user calendar
- Read subordinate users' calendar
- Read client calendar
- Read project calendar
- Read portfolio calendar

Work with DMS

- Create documents
- Read documents
- Change documents
- Delete documents
- Restore documents
- Manage folder structure

3.2.2.2 Create a new user role

Step by step

1. Click the button .
2. Enter a name for the role, optionally add notes.
3. Click **Save**.

Check the result: the new user role appears in the list under **Administration > User roles** and can be assigned to users.

3.2.2.3 Related topics

- *Customize user access rights*
- *Folder roles*
- *Roles and permissions matrix*
- *Manage users and permissions*
- *Set up Rillsoft Integration Server for several project managers* — rights for several project managers and summary projects

manage users, manage access rights, access rights, permissions, user roles, folder roles, manage permissions, it-administration

3.3 Resource pool and teams

This section describes managing employees (personnel), roles and teams in the resource pool that Rillsoft Project uses for planning.

3.3.1 Personnel

Goal: you get an overview of all personnel resources in the client's resource pool, filter and sort the list, and, if needed, convert a personnel resource into a user.

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 Projects
 Portfolio
 Links

RESOURCE POOL
 Employees
 Employee role
 Teams

Calendar
 Dev ▾
 Timesheet ▾

Employee list

Client: Filter:

Actions	First name	Last name	Email	Code	Start w...	Team	Qualification	Notes
	Red	Superman	superman@exampl.com		12.01	South	manager	
	John	Tidy	td@gmail.com		13.01 13.02	North - Team A North - Team A	programmer - C++ programmer - V.Basic	
	Bill	Diligent	dlg@gmail.com		14.01 14.02	East East	programmer - V.Basic programmer - PHP	
		Goeslike	goeslike@exampl.com		15.01 15.02	South South	support writer	
		Sleeper	slp@gmail.com		16.01 16.02	West West	programmer - C++ designer	
		Eager	eag@gmail.com		17.01 17.02	North - Team A North - Team A	analyst programmer - C++	
		Slow	slw@gmail.com		18.01	South	programmer - C++	
		Fast			19.01 19.02	East East	programmer - C++ programmer - V.Basic	
		Think			20.02 20.03	West West	analyst designer	

Here you get an overview of all personnel resources in the client's resource pool.

- Enter a search term in the **Filter** field to narrow down the selection.
- Sort the list by any column by clicking the arrow in the column's title area.

Project name	Priority	Code
2016_2_soft		
Employee_2016_non_work		
Initiation		

Clicking the arrow in the 'Project name' header opens a menu with options: Sort Ascending, Sort Descending, and Columns.

3.3.1.1 Convert a personnel resource into a user

Click the button in the row of the desired personnel resource — a new user is created from it.

3.3.1.2 View user data

If a user already exists in Rillsoft Integration Server for a personnel resource, you can see their information via the button in their row.

User List									
+ Create Filter: fig@gmx.de Login									
Actions	Login	API key	First Name	Last Name	Email	Phone	Mobile	Create At	Last Visit
	fig		Bodo	Fleissig	fig@gmx.de			06/23/2014 11:19:43	

3.3.1.3 Related topics

- [Roles](#)
- [Team](#)
- [Connect the resource pool to Rillsoft Project](#)
- [Resource pool and teams](#)

3.3.2 Roles

Goal: you view your personnel resources grouped by professional qualification (role) and switch employees of a role on or off as needed.

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Employees

Employee role

Teams

Role

Client:

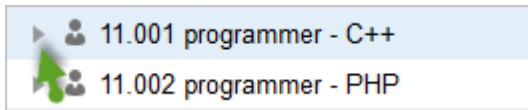
Filter:

Apply

Id	Employees count	Code	Email	Team	Notes
programmer - C++ 5					
13.01 John Tidy td@gmail.com 13.01 North - Team A					
16.01 Sleeper slp@gmail.com 16.01 West					
17.02 Eager eag@gmail.com 17.02 North - Team A					
18.01 Slow slw@gmail.com 18.01 South					
19.01 Fast 19.01 East					
programmer - PHP 2					
programmer - V.Basic 4					
13.02 John Tidy td@gmail.com 13.02 North - Team A					
14.01 Bill Diligent dlg@gmail.com 14.01 East					
19.02 Fast 19.02 East					
21.02 Consider 21.02 South					
writer 1					
manager 2					
designer 2					
analyst 2					
support 2					
tester 2					

Here your personnel resources are listed by professional qualification.

- Enter a search term in the **Filter** field to narrow down the selection.
- Switch employees of a role on or off.



Note

These “roles” are professional qualifications in the resource pool and are independent of the access-rights roles (user roles/folder roles), see [Roles and permissions matrix](#).

3.3.2.1 Related topics

- [Personnel](#)
- [Team](#)
- [Resource pool and teams](#)

3.3.3 Team

Goal: you view your personnel resources grouped by team and switch employees of a team and role on or off as needed.

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Folder roles

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RESOURCE POOL

Employees

Employee role

Teams

Teams

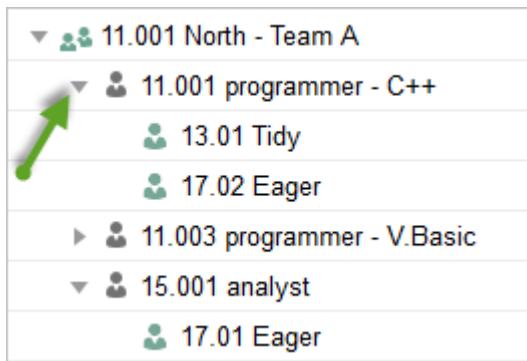
Client: EN Filter: Apply

Id	Employees count	Code	Email	Notes
▼ 11.001 North - Team A	3			
▼ programmer - C++	2			
13.01 John Tidy			td@gmail.com	
17.02 Eager			eag@gmail.com	
▶ programmer - V.Basic	1			
▶ analyst	1			
▶ support	1			
▶ 12.001 South	5			
▶ 13.001 East	2			
▶ 14.001 West	2			

Here your personnel resources are listed by team.

- Enter a search term in the **Filter** field to narrow down the selection.

- Switch employees of a team and role on or off.



3.3.3.1 Related topics

- [Personnel](#)
- [Roles](#)
- [Resource pool and teams](#)

manage resource pool, employee roles, resource pool, personnel, employees, teams, roles, resource-manager

3.4 Share projects and portfolios

This section describes how projects and portfolios are managed, locked/unlocked, linked and imported via Rillsoft Integration Server.

3.4.1 Lock

Goal: you get an overview of who is currently working with shared projects, the resource pool, or floating licenses, and remove locks as needed.

When locks arise in team operation and when you should remove them is described in [Monitor locks in team operation](#).

Lock shows on three tabs whether other users are currently

- working with shared projects,
- making changes in the resource pool,
- using floating licenses.

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Links

RESSOURCENPOOL

Employees

Employee role

Teams

Filter:

Locked projects
Locked resources pool
Locked floating licenses

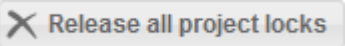
X Release all project locks

Action	Folder way	Project name	Cox	Project locked at	IP-adress of u...	User name
X	Root Folder->2016	new_software devel...		03/04/2016 13:32:49	127.0.0.1	Admin AdminMan

3.4.1.1 Locked projects

Here you get an overview of locked projects — including since when and by whom they were taken into editing.

If you have the appropriate access rights, you can

- unlock all projects together by clicking the **Unlock all** button ,
- or unlock individually selected projects by clicking the icon button  in the **Actions** column.

3.4.1.2 Locked resource pools

Locked projects		Locked resources pool	Locked floating licenses
Action	Resources pool lo...	IP-adress of user	User name
✕	16.07.2015 10:28:06	127.0.0.1	Admin AdminMan

If a user has opened the resource pool for editing, this tab shows information on since when and by whom it was opened for editing. With the appropriate access rights, you remove the lock via the icon button  in the **Actions** column.

3.4.1.3 Locked floating licenses

Locked projects		Locked resources pool		Locked floating licenses	
Action	Serial number	Version	License locked at	IP-adress of user	User name
X	01.07.2015 08:57:56	2 Enterprise	16.07.2015 08:57:56	127.0.0.1	Admin AdminMan

Here you see which users are currently working with a floating license. Use the icon button  in the **Actions** column to end a user session and free up the floating license again.

3.4.1.4 Check the result

After unlocking, the corresponding entry disappears from the list — the resource (project, resource pool, or floating license) is available again for other users.

3.4.1.5 Related topics

- [Projects](#)
- [Floating licenses of a client](#)
- [Share projects and portfolios](#)
- [Monitor locks in team operation](#)

3.4.2 Projects

Goal: you get an overview of a client's projects, delete a project if needed, or restore an earlier project version.

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Retention period

Import System

Vacation import

Dev

E-mail Notification

Timeline

Vacation

Timesheet

DMS

Redmine

Projects

Client: EN

Automatic plant: This year

Date start: 01/01/2024

Date end: 12/31/2024

Filter:

Apply

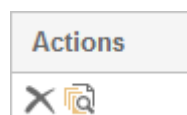
Actions	Verzeichnispfad	Project name	Code	Customer	Category	Status	Priority	Start time	Finish time	Create at	Locked by user	Project locked at	Note
	Root Folder/2024	Prepare project					100	03/19/2024 08:00	04/16/2024 17:00	03/19/2024 10:21	Admin AdminMan		
	Root Folder/2024	Project plan					100	04/17/2024 08:00	05/20/2024 08:00	03/19/2024 10:21	Admin AdminMan		
	Root Folder/2024	Building planning					100	05/16/2024 08:00	06/11/2024 16:00	03/19/2024 10:21	Admin AdminMan		

Here you see all projects of the client, or — filtered by selection criteria — a subset of them.

Projects													
Client: EN_2016		Automatic plant: Custom		Date start: 01/01/2016		Date end: 03/15/2016		Filter:		Login			

You can set a time frame or enter a search term in the **Filter** field for the **Directory path** or **Project** columns.

3.4.2.1 Functions



In the **Actions** column, the icon buttons **Delete project** () and **Restore old project version** () are available for each project.

3.4.2.2 Step by step: restore a project version

1. Click the **Restore project version** icon button (). You get a list of all saved project versions.

Project revision history: software development process				
Actions	Revision	Created at	User	Note
	79	02/22/2016 12:58	Admin AdminMan	
	65	02/15/2016 11:27	Admin AdminMan	
	61	02/13/2016 22:11	Admin AdminMan	
	59	02/13/2016 15:41	Admin AdminMan	
	52	02/13/2016 13:20	Admin AdminMan	
	3	01/26/2016 18:51	Admin AdminMan	

2. Restore the desired project version via the **Restore** icon button ().

If you assigned **commit comments** when saving the project, you can use them for orientation.

Options

General
Display
Extended
Customize Ribbon
Quick Access Toolbar

General

Design: White

Default location

Projects: D:\01 RP\EN_Samples\2024

Portfolios: D:\01 RP\EN_Samples\2024

Templates: D:\01 RP\EN_Samples\2024\Template

Documents: D:\01 RP\EN_Samples\2024\Documente

Default parameters for new activity

Fix: Duration

Duration: 8 h

Display in views

☐ Grid in resource chart and cost chart
☒ Earliest/latest possible start dates and reserve time

☒ Label resource chart
☒ Total personnel capacity in Gantt chart

☒ Show weekends and holidays
☒ Read-only projects in the portfolio of grey

☒ Show nonworking days

Advanced

☒ Different project resources substitute resource pool
Auto restore: 5 min

☐ Move due date to current date
Currency: \$

☒ Check for new versions
Undo depth: 100

Annual working time per employee: 1500 h/year
Activity are critical, if buffer less than or equal: 0 h

Rillsoft integration server

☐ Enter commit comment for project versions
☐ Use a proxy server for your LAN

Timeout: 600 s
Adresse:

HTTP authentication
Port number: 8080

User name:
User name:

Password:
Password:

OK
Abbrechen
Hilfe

Note

Commit comments are only available if the **Enter commit comments for project versions** option is turned on in Rillsoft Project.

3.4.2.3 Check the result

The restored project version replaces the project's current state.

3.4.2.4 Related topics

- [Lock](#)
- [Portfolio](#)
- [Share projects and portfolios](#)

3.4.3 Portfolio

Goal: you get an overview of all portfolios of a client and switch from there to the projects they contain.

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Client: Filter: Login

Actions	Portfolio	Project count	Description
🔍	2011_portfolio	2	
🔍	2016 portfolio	5	
🔍	New portfolio	0	

Here you see all portfolios and their project count. You can enter a search term in the **Filter** field for the **Portfolio** column.

3.4.3.1 Functions

Actions



3.4.3.2 Step by step: switch to projects in the portfolio

1. In the desired row, click the **Switch to projects in the portfolio** icon button.



3.4.3.3 Check the result

You see all projects that belong to this portfolio.

Projects													
Client: EN		Portfolio: Portfolio 2024		Automatic plant: This year		Date start: 01/01/2024		Date end: 12/31/2024		Filter:		Apply	
Actions	Verzeichnispfad	Project name	Code	Customer	Category	Status	Priority	Start time	Finish time	Create at	Locked by user	Project locked at	Note
	Root Folder/2024	Prepare project					100	03/19/2024 08:00	04/16/2024 17:00	03/19/2024 10:21	Admin AdminMan		
	Root Folder/2024	Project plan					100	04/17/2024 08:00	05/20/2024 08:00	03/19/2024 10:21	Admin AdminMan		
	Root Folder/2024	Building planning					100	05/16/2024 08:00	06/11/2024 16:00	03/19/2024 10:21	Admin AdminMan		

3.4.3.4 Related topics

- [Projects](#)
- [Links](#)
- [Share projects and portfolios](#)

3.4.4 Links

Goal: you check and edit cross-project links, resolving time conflicts between linked projects.

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📁 Organisation chart

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🔑 Client release

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📁 Folder roles

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🔒 Locks

📁 Projects

📁 Portfolio

🔗 Links

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👤 Employee role

👤 Teams

ADD-ONS

📅 Calendar

⚙️ Dev

📅 Timesheet

🕒 Retention period

📧 E-mail Notification

🗂️ DMS

🔌 Import System

📅 Timeline

🟢 Redmine

📅 Vacation import

📅 Vacation

Cross-project links

Client: EN

Automatic plant: Custom

Date start: 01/01/2016

Date end: 12/31/2016

Filter:

Apply

State	Actions	Rese...	Delay time	Outgoing project / activity	Outgoing project / activity	Start time	Finish time
⚠️	🔗	-1.00	-15.04	Project1 / project end	new_software development process / software development planning	02/12/2016 09:00 +1.00	01/27/2016 08:00
✅	🔗	+53.00	-55.25	Project2 / task 6	2016_2_soft / software development planning	03/31/2016 14:00 +2.00	03/29/2016 08:00 +55.00
⚠️	🔗	-3.92	-0.17	software development process / End	Project1 / task 4	02/01/2016 10:00 +3.92	01/28/2016 08:00
⚠️	🔗	-3.88	0.00	software development process / End	Project1 / task 1	02/01/2016 10:00 +3.92	01/28/2016 13:00
✅	🔗	0.00	-22.00	new_software development process / End	Project2 / task 1	03/31/2016 14:00	03/09/2016 14:00
✅	🔗	+1.96	0.00	software development process / software configuration management	new_software development process / software development planning	01/25/2016 09:00	01/27/2016 08:00

Cross-project links differ from normal links in two ways:

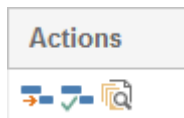
- The successor project is not shifted automatically if the predecessor project's finish date moves. Instead, a delay (negative or positive) is set.
- In addition to the delay, a cross-project link has a time reserve: after linking two projects, a time difference between the end of the predecessor and the start of the successor is considered not only as a delay but also as a reserve.

Here you can check and edit the cross-project links.

Cross-project links													
Client: EN_2016		Automatic plant: Custom		Date start:		Date end:		Filter:		Login			

You can set a time frame or enter a search term in the **Filter** field for the **Project/Activity** columns.

3.4.4.1 Functions



- **Status accepted** ()
- **Conflict message** ()
- **Shift successor** ()
- **Correct delay by reserve** ()
- **Revision history** ()

Status: the **Status** column shows whether time changes related to the start or end of the cross-project links occurred, or whether conflicts arose.

3.4.4.2 Example: resolve a time conflict

1. You created a link between two planned projects with a negative delay, because the second project starts earlier than the first project ends.

Cross-project links							
Client: EN_2016		Automatic plant: Custom		Date start:	Date end:	Filter:	Login
State	Actions	Reserve	Delay time	Outgoing project / activity	Outgoing project / activity	Start time	Finish time
		-2.17	0.00	software development process / End	Project1 / task 1	01/28/2016 12:00 +8.00	01/26/2016 08:00
		-1.00	-15.04	Project1 / project end	new_software development process...	02/12/2016 09:00 +1.00	01/27/2016 08:00
		0.00	-55.25	Project2 / task 6	2016_2_soft / software development...	03/29/2016 14:00	02/03/2016 08:00
		-2.00	-20.00	new_software development process / ...	Project2 / task 1	03/31/2016 14:00 +2.00	03/09/2016 14:00
		0.00	-0.17	software development process / End	Project1 / task 4	01/28/2016 12:00	01/28/2016 08:00

2. A time shift occurs in the first project: the predecessor ends 7 days later than originally planned.

Cross-project links							
Client: EN_2016		Automatic plant: Custom		Date start:	Date end:	Filter:	Login
State	Actions	Reserve	Delay time	Outgoing project / activity	Outgoing project / activity	Start time	Finish time
		-2.17	0.00	software development process / End	Project1 / task 1	01/28/2016 12:00 +8.00	01/26/2016 08:00
		-1.00	-15.04	Project1 / project end	new_software development process...	02/12/2016 09:00 +1.00	01/27/2016 08:00
		0.00	-55.25	Project2 / task 6	2016_2_soft / software development...	03/29/2016 14:00	02/03/2016 08:00
		-2.00	-20.00	new_software development process / ...	Project2 / task 1	03/31/2016 14:00 +2.00	03/09/2016 14:00
		0.00	-0.17	software development process / End	Project1 / task 4	01/28/2016 12:00	01/28/2016 08:00

The value in the **Reserve** column shows by how many days the original plan has changed. **Red** indicates a growing time deficit, **green** indicates a gained time reserve.

3. Via the **Shift successor** icon button (), the dates of the successor project are shifted by the value of the reserve.

Projektübergreifende Verknüpfungen							
Mandant: Maschinenbau		Period: Benutzerdefinier		Von:	Bis:	Filter:	Anwenden
Status	Aktion	Reserve	Verzögerung	Ausgehendes Projekt / Vorgang	Ankommendes Projekt / Vorgang	Anfangstermin	Endtermin
		+5.00	-19.12	Maschine ABC / Konstruktion Ende	Maschine CDF / Konstruktion M	01.12.2014 11:00	17.11.2014 08:00
		0.00	-62.96	Maschine AAA / IB Software	Maschine CC1 / Konstruktion M	06.05.2015 12:00	04.03.2015 13:00
		0.00	-36.25	Maschine CC1 / Fertigung, IB E	Maschine MMA / Konstruktion M	28.04.2015 17:00	23.03.2015 11:00 +7.00

The next time the portfolio is opened in Rillsoft Project, you get a message about the date changes in the successor project.

3.4.4.3 Further functions

Revision history: use the icon button () to see the history of the link.

Cross project link: software development process / End - Project1 / task 1					
Revision	Lock at	User	Start time	Finish time	Reserve
7			01/26/2011 14:00	01/26/2016 08:00	+1825.75
52	02/13/2016 13:20:23	Admin AdminMan	12/30/2015 12:00 +1798.92	01/26/2016 08:00	+26.83
59	02/13/2016 15:41:52	Admin AdminMan	01/20/2016 12:00 +21.00	01/26/2016 08:00	+5.83
61	02/13/2016 22:11:39	Admin AdminMan	01/25/2016 12:00 +5.00	01/26/2016 08:00	+0.83
79	02/22/2016 12:58:48	Admin AdminMan	01/28/2016 12:00 +3.00	01/26/2016 08:00	-2.17

Correct delay by reserve: use the icon button () to recalculate the delay based on the reserve.

3.4.4.4 Check the result

After resolving a time conflict, the **Status** column shows that the link is accepted again, and the date change is visible in the successor project.

3.4.4.5 Related topics

- [Projects](#)
- [Portfolio](#)
- [Share projects and portfolios](#)

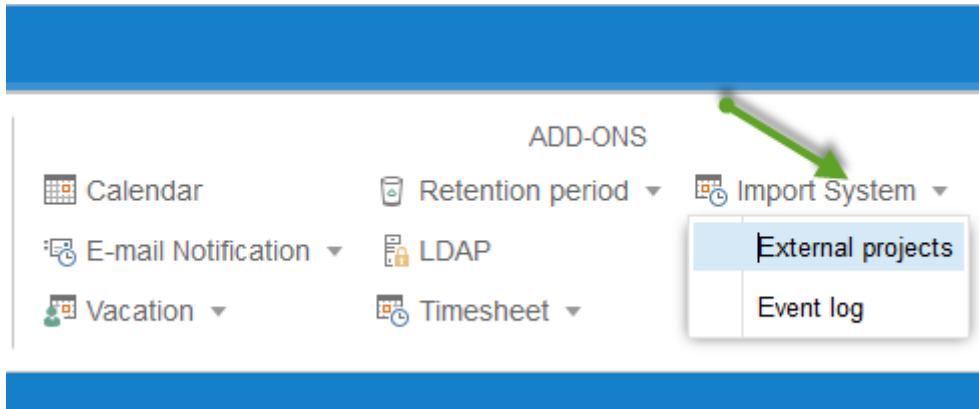
3.4.5 Project Import

Goal: you import ERP project structures and ERP project data into Rillsoft Integration Server projects.

Prerequisite: a predefined template should exist for each imported project level (subproject).

3.4.5.1 Step by step

1. Click **Add ons > Project Import**.



2. Select the **External projects** menu item. You get all projects ready for import from your external system.

External projects						
Client: Mein Mandant		Filter:		Login		
Action	Unique ID	Name	Start	Finish	Template code	Import folder
	130	Import 5		03/01/2020 17:00	PRJ1	2015_Import_BCD
	129	Import 4		03/01/2020 17:00	PRJ1	2015_Import_BCD
	128	Import 3	04/01/2020 08:00		PRJ1	2015_Import_ABC
	127	Import 2	02/01/2020 08:00		PRJ1	2015_Import_ABC
	126	Import 1	01/01/2020 08:00		PRJ1	2015_Import_ABC

3.4.5.2 Configure the outline depth

You set the outline depth in the client properties: click **Administration > Clients > Edit**.

Mandant

Allgemein
Projekteigenschaften
iCalendar
Aufbewahrungsfristen
Projekt Import
Tip

Projekt View: ext_view_project
Level1 View: ext_view_level1
Level2 View: ext_view_level2
Level3 View:
Level4 View:

Speichern
Abbrechen

3.4.5.3 Check the result

The **Event log** shows whether the import completed successfully.

Event log of Project Import				
Client:	Mein Mandant	Automatic plant:	Custom	Date start: Date end: Filter: Login
Status	E-Mail	Message	Date	
✓		In Mandant Mein Mandant waren 5 Projekte importiert!	07/18/2015 08:49:50	
✓		In Mandant Mein Mandant waren 0 Projekte importiert!	07/18/2015 08:46:06	
⚠		Import-Fehler bei Mandanten 'Mein Mandant' ProjektId '130'	07/18/2015 08:46:05	

Tip

You can automate the import by creating a scheduled task under **Start > Control Panel > Administration > Task Scheduling**.

3.4.5.4 Related topics

- [Projects](#)
- [Share projects and portfolios](#)

3.5 Enable Teamwork with Summary Projects

With Rillsoft Integration Server, several project managers plan in Rillsoft Project at the same time. Each maintains their own project, all use the same resource pool, and with the **summary project** related projects are opened together, linked and planned like **one** project. Summary projects can also be added to a portfolio.

This applies to both operating models: **on-premises server** and **Rillsoft Cloud**.

This section describes what you set up as administrator so that this teamwork works. How project managers work together in Rillsoft Project is described in the Rillsoft Project help: [Plan as a Team: Multi-User Work and Summary Projects](#).

3.5.1 Set up Rillsoft Integration Server for several project managers

Goal: several project managers can plan in Rillsoft Project at the same time, open projects together as a summary project and link them across projects.

Prerequisite: you are logged in as administrator. The steps apply to the on-premises server and to Rillsoft Cloud.

3.5.1.1 Checklist

No.	Step	Notes
1	Define the client	All projects that are planned together or opened in a summary project belong to one client and therefore use the same resource pool. See Create your first client .
2	Create the folder structure	Create folders per undertaking, team or department, for example one folder per summary project with subfolders per trade. See Folders .
3	Create and release users	Each project manager needs a user and the Client release for the client. Without client release, they cannot open any projects or resource pools of this client in Rillsoft Project. See Define a user's client access .
4	Assign folder roles	Project managers receive Create project , Read project and Change project for their folder, and only Read project for neighboring folders if needed. Whoever edits the summary project as a whole needs rights for all folders involved. If a project is split into several projects in Rillsoft Project with Split project , the new projects are saved in the selected target folders. See Folder roles .
5	Grant rights for locks	The folder rights Lock project and Unlock project control who may lock projects for editing and remove locks. See Monitor locks in team operation .
6	Assign user roles	At least Read resource pool . For portfolios and cross-project links, the rights of the group Work with portfolio . See User roles .
7	Define who is responsible for the resource pool	Only a few users receive Change resource pool . This keeps the shared resource base consistent.
8	Check licenses	There must be enough license seats for all users who work at the same time. See Floating licenses in detail .

One folder structure per undertaking and team in the client's folder list:

Directory list				
Client: EN_2016		Login		
Folder Structure	Actions	Email Notification	Project Count	Description
▼ Root Folder		1/7/7/7/2/	0	
2016		1/7/7/7/2/	5	
Template		1/7/7/7/2/	1	
2011		1/7/7/7/2/	2	
test		1/7/7/7/2/	4	
Other		1/7/7/7/2/	1	

3.5.1.2 Rights by task in the team

Task in the team	Typical rights
Project manager of a sub-undertaking	Client release; folder role with Create project , Read project , Change project for their own folder; user role with Read resource pool
Overall project management	Additionally Read project , if needed Change project for all folders involved; rights to create, change and delete cross-project links
PMO / executive management	Read project for all relevant folders; Read portfolio , if needed Create portfolio and Change portfolio
Resource manager	Read resource pool and Change resource pool
Administration	Unlock project , Unlock resource pool , Unlock license

The table is a recommendation. The user roles do not list a separate right for summary projects; which projects a user can open and change in the summary project results from their folder roles. Adapt the roles to your organization. An overview of all rights is provided in [Roles and permissions matrix](#).

Note

In the **Rillsoft Integration Server summary project** dialog in Rillsoft Project, the **Available** column shows how many projects of the summary project the logged-in user can read. If projects are missing for a user in the summary project, check their folder roles, see [Why doesn't a user see a project or portfolio?](#).

3.5.1.3 Check the result

- Each project manager can open and save their project in Rillsoft Project via **File > Open > Rillsoft Integration Server > Project**.
- The overall project management can open all projects involved via **File > Open > Rillsoft Integration Server > Summary project**.

- All projects use the same resource pool.

3.5.1.4 Related topics

- [Enable Teamwork with Summary Projects](#)
- [Monitor locks in team operation](#)
- [Manage users and permissions](#)
- [Customize user access rights](#)
- [Manage a Summary Project in the Rillsoft Project help](#)

summary project rights, folder roles project manager, client release, overall project management, teamwork checklist, access rights, permissions, user roles, folder roles, manage permissions, it-administration

3.5.2 Monitor locks in team operation

Goal: you understand when projects and the resource pool are locked, and remove locks only when nobody is working on them any more.

When several project managers work at the same time, locks prevent changes from overwriting each other. How to display and remove locks in the web interface is described in [Lock](#).

3.5.2.1 When something is locked

What	When locked
Project	When a user opens the project for editing in Rillsoft Project. In the Pessimistic locking mode, all other users can open the project during this time only as a read-only copy. In the Optimistic locking mode, every user can edit the project at any time.
Resource pool	When a user has opened the resource pool for editing.
Floating license	As long as a user is working with a floating license.

The user selects the locking mode in Rillsoft Project when opening a project or summary project. This selection is available only to users with the corresponding access rights.

In Rillsoft Project, project managers see in the open dialog whether a project is locked; in the summary project, locked projects have a red background.

3.5.2.2 Monitor locked projects

Under **Locks > Locked projects** you see which projects are currently locked, since when and by which user.

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Folders

Client release

User roles

Folder roles

PROJECTS

Locks

Projects

Portfolio

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RESSOURCENPOOL

Employees

Employee role

Teams

Filter:

Locked projects

Locked resources pool

Locked floating licenses

Action	Folder way	Project name	Cox	Project locked at	IP-adress of u...	User name
X	Root Folder->2016	new_software devel...		03/04/2016 13:32:49	127.0.0.1	Admin AdminMan

Check the list especially before status meetings or when a project manager reports that they can open their project only read-only.

3.5.2.3 When to remove a lock

Remove a lock if the user is demonstrably no longer working on the project, for example:

- Rillsoft Project was not closed properly after a crash or a lost connection.
- The user is absent and someone else urgently needs the project.
- A project has been locked for an unusually long time.

Warning

Before unlocking, talk to the user who locked the project. If they are still working on it, two users can make changes at the same time after unlocking, and changes can be lost.

Who may remove locks is controlled by the rights **Unlock project** (folder role, see [Folder roles](#)) and **Unlock resource pool** (user role, see [User roles](#)).

3.5.2.4 Recommendations for the team

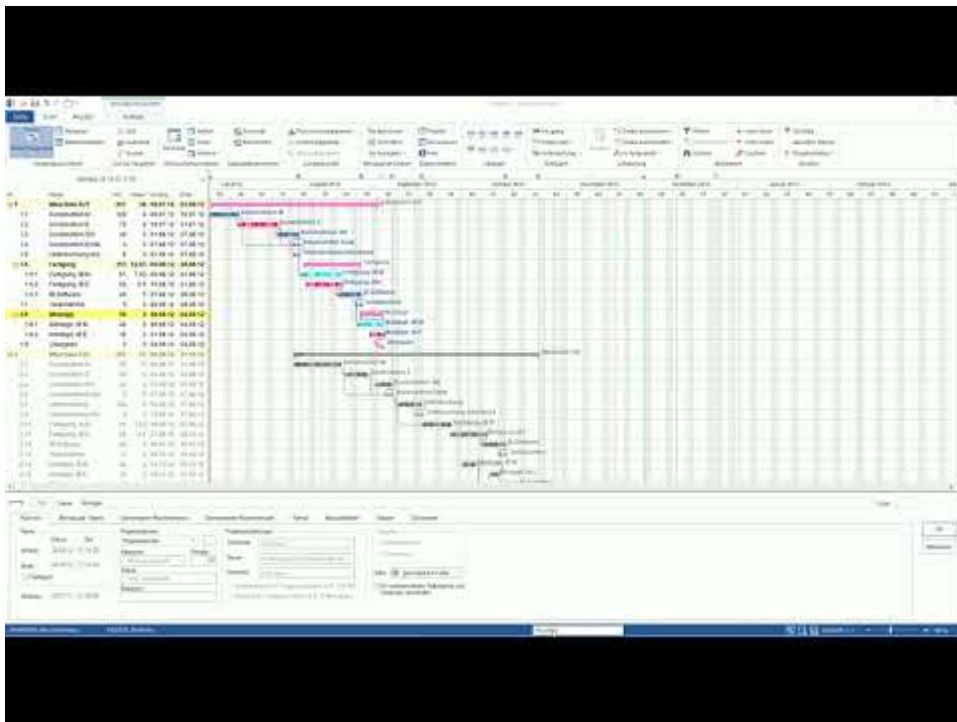
- Define the locking mode uniformly in the team, usually **Pessimistic**.
- Close projects after editing so that the lock is released.
- Open projects that are only viewed as read-only.
- Grant the right **Unlock project** only to a few users, for example administration.

3.5.2.5 Related topics

- *Enable Teamwork with Summary Projects*
- *Set up Rillsoft Integration Server for several project managers*
- *Lock*
- *Why does floating license access fail?*
- *Work on Projects Simultaneously in the Rillsoft Project help*

lock, locked project, unlock, locking mode, pessimistic, optimistic, read-only, ris, integration server, cloud, on-premises, on-premises server, operating model, multi-user, it-administration

3.5.3 Video: multi-user work in Rillsoft Project



Multiprojektplanung im Team: Multiuserarbeit – Rillsoft Project (YouTube, in German, approx. 8 minutes)

3.5.4 What Rillsoft Integration Server provides

Building block	Meaning for teamwork
Central data storage	Projects, portfolios, summary projects and the resource pool are stored on the server instead of in local files.
Client with resource pool	Each client has exactly one resource pool. All projects that are planned together belong to the same client. See <i>Create your first client</i> .
Folders and folder roles	Define who may see, change, lock or unlock which projects. See <i>Folders</i> and <i>Folder roles</i> .
User roles	Control folder-independent rights, for example for portfolios, cross-project links and the resource pool. See <i>User roles</i> .
Locks	Prevent changes made by several users from overwriting each other. See <i>Monitor locks in team operation</i> .
Floating licenses	Determine how many users can work at the same time. See <i>Floating licenses in detail</i> .

3.5.5 Typical scenarios

- Several project managers plan their own projects with the same employees.
- A large undertaking is split into several projects, for example by trade or department. An overall project management opens all parts as a summary project.
- PMO or executive management evaluate summary projects together with other projects in the portfolio.

The same setup applies to all three scenarios, see *Set up Rillsoft Integration Server for several project managers*.

3.5.6 Related topics

- *Set up Rillsoft Integration Server for several project managers*
- *Monitor locks in team operation*
- *Share projects and portfolios*
- *Cloud vs. on-premises operation*

multi-user work, multi-user, multi-user operation, teamwork, summary project, several project managers, rillsoft cloud, ris, integration server, cloud, on-premises, on-premises server, operating model, it-administration

3.6 Configure add-ons

This section describes the add-ons of Rillsoft Integration Server: iCalendar, email notification, holiday planning, data deletion, time entry (feedback), DMS and timeline.

3.6.1 iCalendar

Goal: you share project appointments via the iCalendar standard with external calendar programs such as Outlook, and set up a client's iCalendar template for this.

The module is based on the iCalendar standard. This way, you can pass project dates to other programs that support the .ics file format, such as Google Calendar, MS Outlook, Mozilla Sunbird, Apple iCal, or IBM Lotus Notes. The iCalendar module delivers the current state of scheduled activities on every access.

Functions

- **User Calendar** shows all of the user's activities across projects, per client.
- **Calendar of subordinate users** shows all activities of subordinate users (based on the administration organization chart) across projects, per client.
- **Client Calendar** shows all of the client's activities across all projects.
- **Portfolio Calendar** includes all activities of a project portfolio.
- **Project Calendar** provides all activities of a project.

Actions	Company	Portfolio	URL
	Maschinenbau	2013	http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=1
	Maschinenbau	2014	http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=2
	Produktion	Portfolio 2023	http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=7&portfolio_id=3
	Maschinenbau	2016	http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=4
	EN	Portfolio 1	http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=9&portfolio_id=5
	EN	Portfolio 2	http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=9&portfolio_id=6
	EN		http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=7
	AAA sdp (2023-04-03 - 2023-06-04)		http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=8
	Building planning (2023-05-08 - 2023-07-24)		http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=9
	ABC software development process (2023-07-03 - 2023-09-01)		http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=10
	Mitarbeiter		http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=11

Prerequisite: to use iCalendar, a user needs the **iCalendar user** user role; an **API access key** must be generated for each iCalendar user.

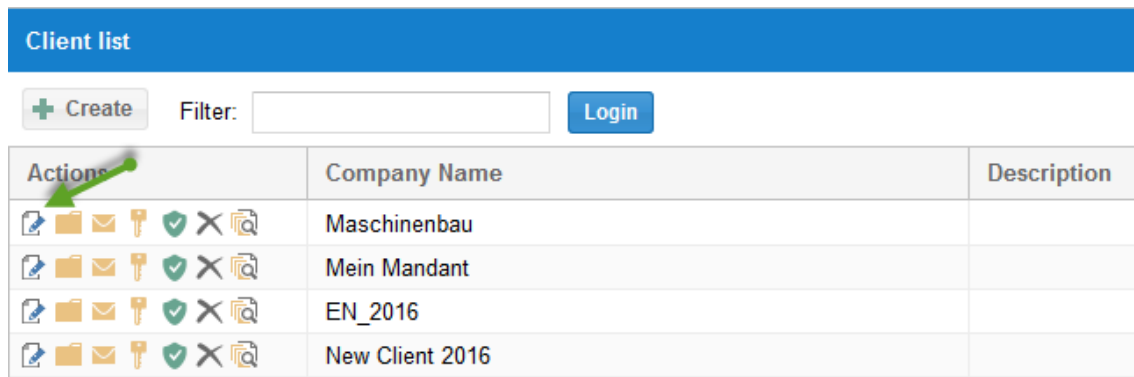
3.6.1.1 Define info for iCalendar

Goal: you define which appointment information is passed on to Outlook via iCalendar.

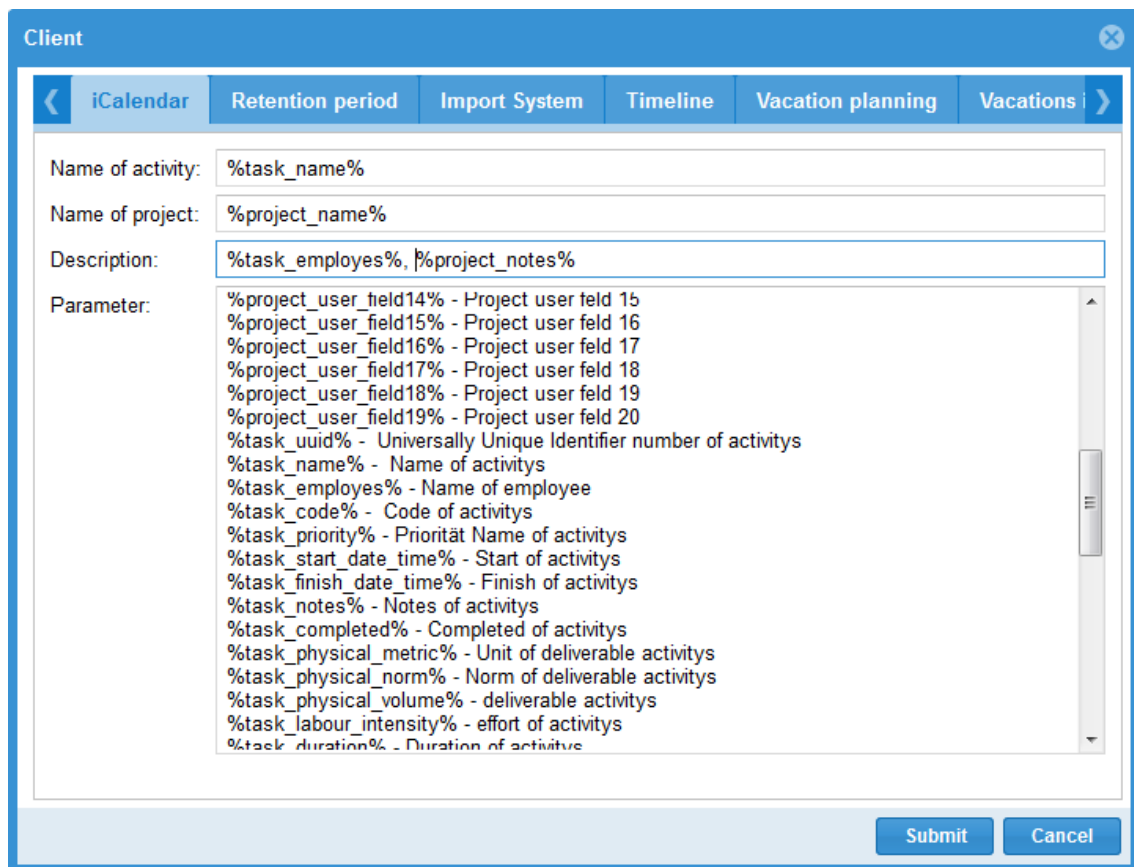
Prerequisite: you have the **Client Administrator** user role.

Step by step

1. Click the button for editing the client.

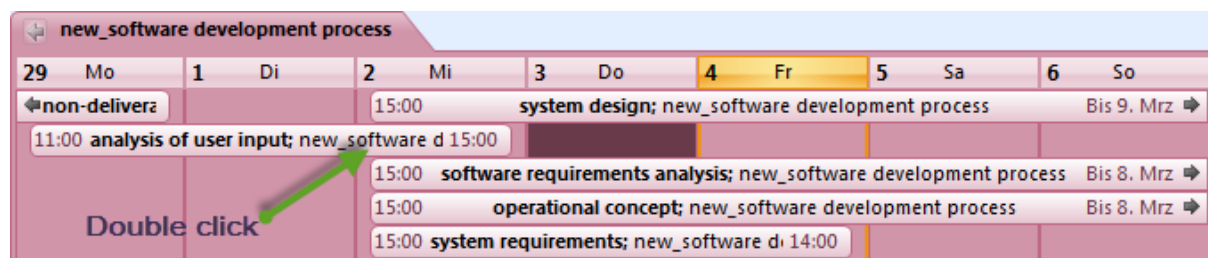


2. In the client properties, on the **iCalendar** tab, define which information should be passed on to Outlook.

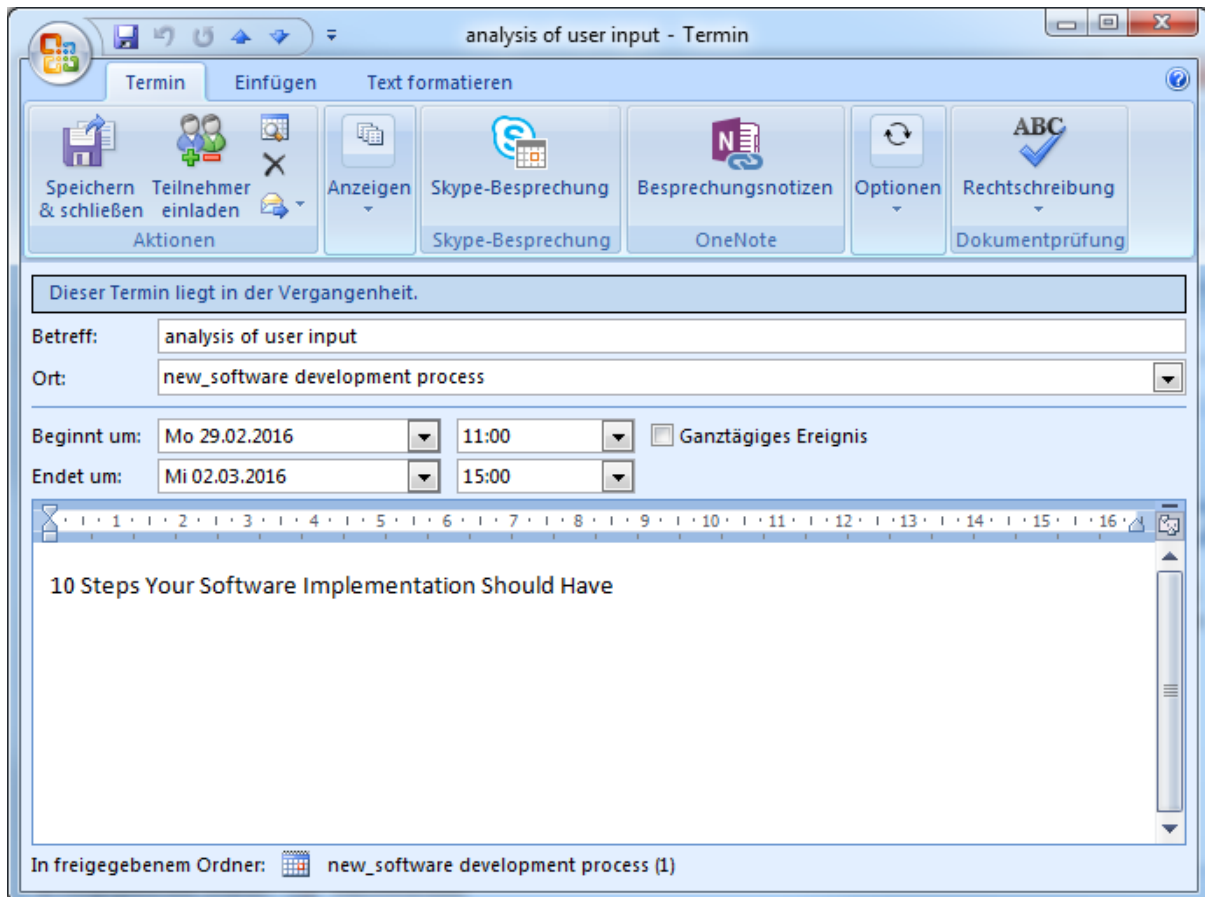


Check the result

After double-clicking an appointment in the Outlook calendar



the defined information is displayed.



3.6.1.2 Related topics

- *E-mail notification*
- *Timeline*
- *API access keys and iCalendar in depth*
- *Configure add-ons*

icalendar, ical, outlook calendar, time entry, feedback, holiday planning, dms, timeline, email notification, project-manager

3.6.2 E-mail notification

Goal: you set up automatic e-mail dispatch to project participants — e.g. for date changes or upcoming activities — and adjust the e-mail templates used, if needed.

The e-mail notification module allows automatic e-mail dispatch to the people involved in a project.

Functions

- Remind employees about **upcoming activities**
- Remind employees about **untimely completed jobs**
- Notify employees about **the change of work**
- Notify users about **the change of work**

- Notify users about **the change of milestone dates**
- Notify users about **negative effort**

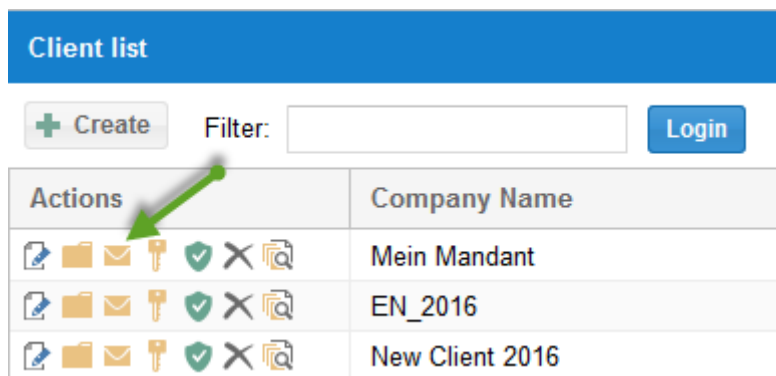
Access rights

To **edit e-mail templates**, a user needs the **Client Administrator** user role. To set the **deadlines for automatic e-mail dispatch**, a user needs the **Root folder administrator** folder role.

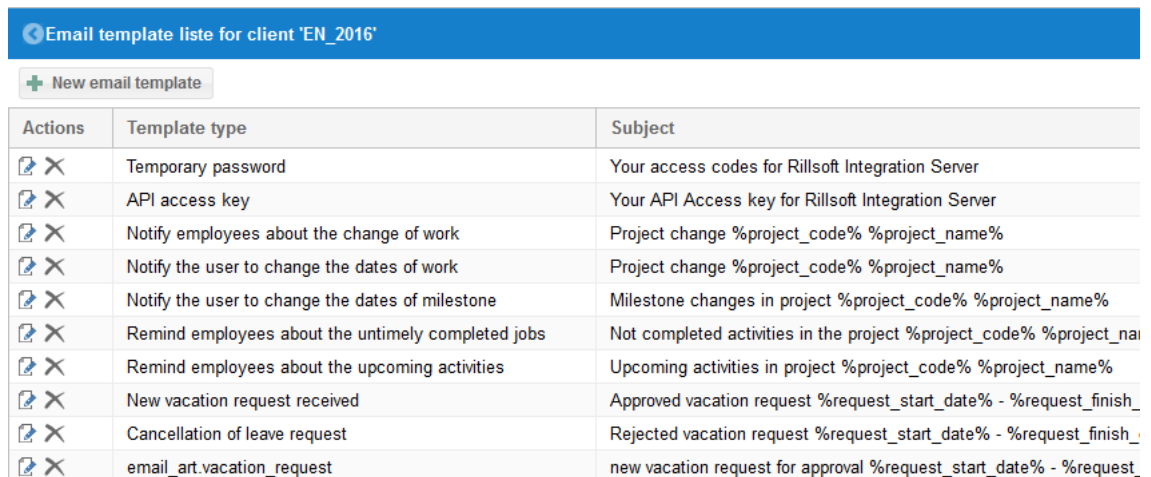
3.6.2.1 Check or change e-mail templates

Step by step

1. Click the **Mail** button.



2. Check existing e-mail templates or change them, and create new ones if needed.

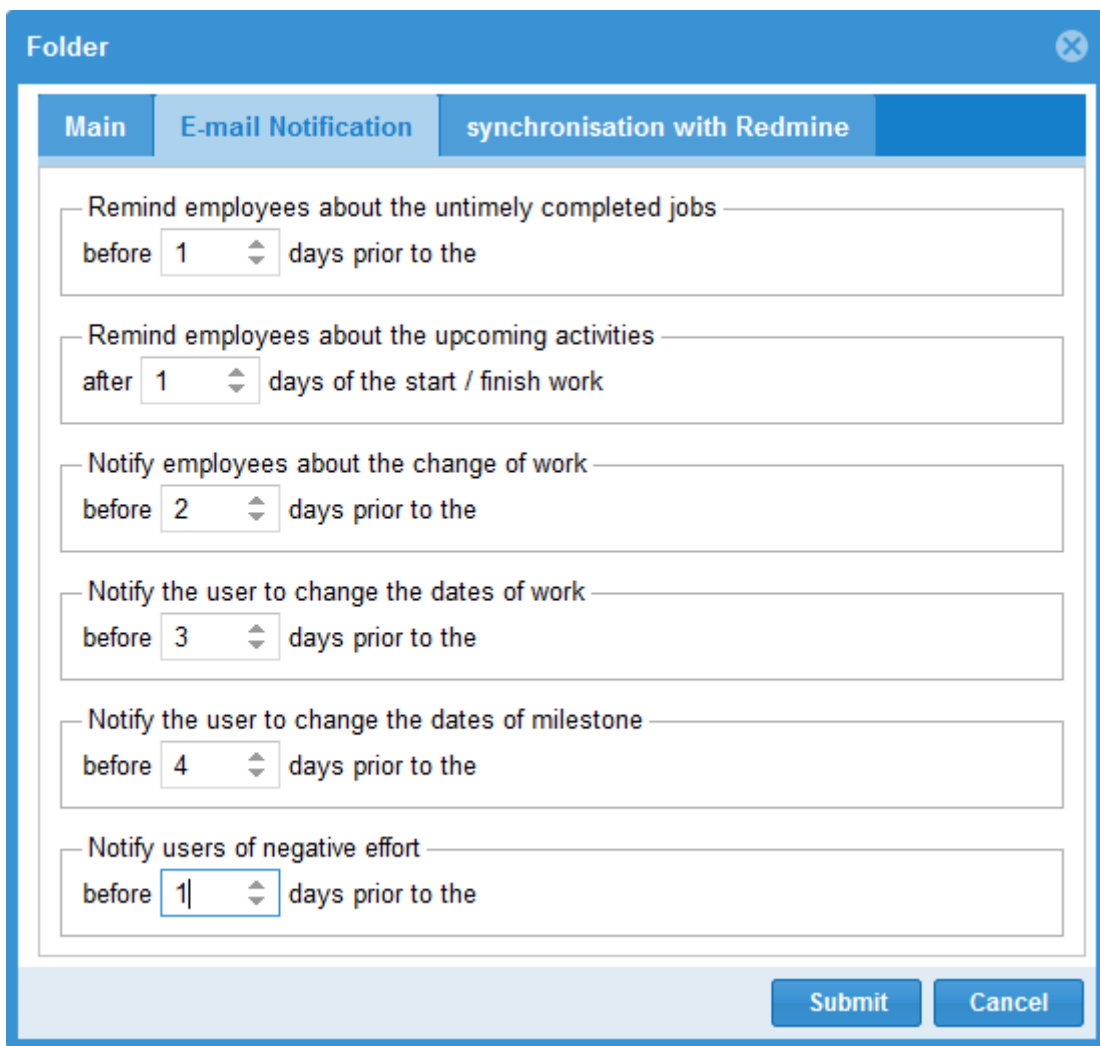


Tip

Depending on the type of e-mail template, different project information is available in the **Parameters** field. In all templates, the subject and text content can be freely defined from the parameters available for that template.

3.6.2.2 Set time limits for e-mail notification**Step by step**

1. Click **Administration > Folders**.
2. In the **Actions** column, click the **Note with a pen** button .
3. Select the **E-mail notification** tab and set the period for the activities.



Folder

Main E-mail Notification synchronisation with Redmine

Remind employees about the untimely completed jobs
before 1 days prior to the

Remind employees about the upcoming activities
after 1 days of the start / finish work

Notify employees about the change of work
before 2 days prior to the

Notify the user to change the dates of work
before 3 days prior to the

Notify the user to change the dates of milestone
before 4 days prior to the

Notify users of negative effort
before 1 days prior to the

Submit Cancel

Check the result

The **E-mail notification** column shows all the defined time limits.

Directory list				
Client: EN_2016		Login		
Folder Structure	Actions	Email Notification	Project Count	Description
▼ Root Folder		1/7/7/7/2/	0	
2016		1/7/7/7/2/	5	
Template		1/7/7/7/2/	1	
2011		1/7/7/7/2/	2	
test		1/7/7/7/2/	4	
Other		1/7/7/7/2/	1	

3.6.2.3 Meaning of the individual notifications

Remind employees about untimely completed jobs that were due X days ago. If this option is on, e-mails are sent to the employees assigned to the activities when:

- the activity start lies within the period from the current date minus X (e.g. 2) days, and the completion percentage for this activity is 0,
- or the activity end lies within the period from the current date minus X (e.g. 2) days, and the completion percentage for this activity is less than 100.

Remind employees about upcoming activities that start in X days. If this option is on, e-mails are sent to employees whose activities start within the period from the current date plus X (e.g. 3) days. Example: if today is July 15 and 3 days are entered, the period runs from July 15 to July 18.

Notify employees about the change of work for activities within X days. If this option is on, e-mails are sent to employees whose activities, lying within the period from the current date plus X (e.g. 1) day, have had a date change.

Notify users about the change of work for activities within X days. If this option is on, e-mails are sent to users who have subordinate employees assigned to activities lying within the period from the current date plus X (e.g. 7) days. You define subordinate employees under **Administration > Users**, column **Actions**, button — the **Filter** field must remain empty.

Notify users about the change of milestone dates within X days. If this option is on, e-mails are sent to users when milestone dates have been shifted.

Warning

The first e-mail notification lists all activities from the project start up to the defined cutoff date (e.g. July 17). After that, only new activities are added — if an employee has already been notified about an activity, they will not be notified again on the next e-mail, even if it is still within the defined period.

Note

You can automate e-mail dispatch by creating a scheduled task under **Start > Control Panel > Administration > Task Scheduling**.

3.6.2.4 Related topics

- *iCalendar*
- *Timeline*
- *Configure add-ons*

3.6.3 Vacation planning

Goal: you manage employees' vacation days and absences — submit and approve requests, and view them in the group calendar.

The vacation planning module lets you manage employees' vacation days and absences.

Functions

- Enter employees' preferred vacation dates via the web interface.
- Check whether there are overlaps between requested vacation days and scheduled activities.
- Approve entered vacation requests (based on the vacation planning organization chart).
- Flexible summary of the absences of all team members.
- Import vacation days from other applications.

Access rights

To **submit a vacation request** and **view the vacation calendar and account**, a user needs the **Vacation planning-user** user role. If a user has the **Vacation planning supervisor** user role, they can also view this information for subordinate users (based on the vacation planning organization chart).

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Employees

Employee role

Teams

Organization Chart

Hierarchy: Filter:

Users Organization Chart	Login
▼ Admin AdminMan	admin
Martin Mustermann	test10
Bodo Fleissig	flg
Udo Schwarz	schw
Andreas Weiss	wss

3.6.3.1 Accounts

You can edit the number of vacation days and the remainder from the previous year.

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Employee role

Teams

ADD-ONS

Calendar

Retention period

Import System

Vacation import

Dev

E-mail Notification

Timeline

Timesheet

DMS

Redmine

Vacation

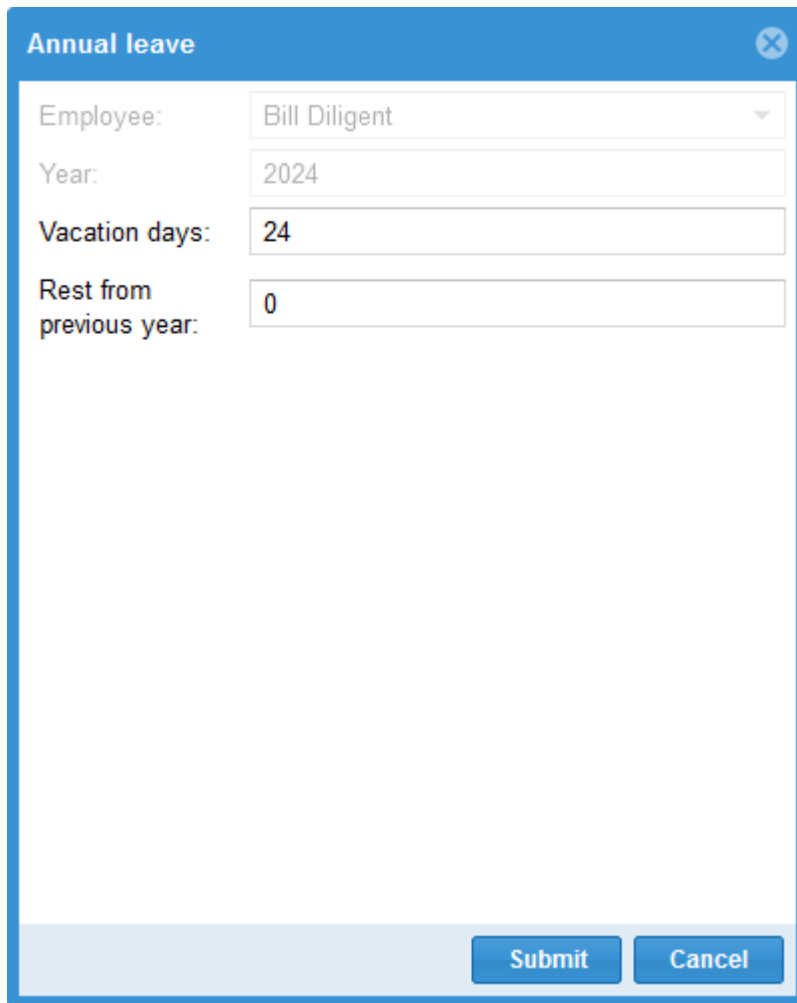
Accounts

Group calendar

Request for vacation

Calendar

Event log



The image shows a dialog box titled "Annual leave" with a close button in the top right corner. It contains four input fields: "Employee:" with a dropdown menu showing "Bill Diligent", "Year:" with a text box containing "2024", "Vacation days:" with a text box containing "24", and "Rest from previous year:" with a text box containing "0". At the bottom right, there are two buttons: "Submit" and "Cancel".

Employee:	Bill Diligent
Year:	2024
Vacation days:	24
Rest from previous year:	0

Submit Cancel

3.6.3.2 Group calendar

You can create group calendars so team members can take other teammates' vacation plans into account. An employee can belong to several groups at the same time.

Group calendar

Client: EN Filter: Apply

Assigning the personnel resources to the group calendar: programmer

Actions	First name	Last name	Email	Code	Start w...	Team	Qualification
-	Red	Superman	superman@exampl.com		12.01	South	manager
✓	John	Tidy	td@gmail.com		13.01 13.02	North - Tea... North - Tea...	programmer - C++ programmer - V Basic
✓	Bill	Diligent	dlg@gmail.com		14.01 14.02	East East	programmer - V Basic programmer - PHP
-		Goeslike	goeslike@exampl.com		15.01 15.02	South South	support writer
✓		Sleeper	slp@gmail.com		16.01 16.02	West West	programmer - C++ designer
✓		Eager	eag@gmail.com		17.01 17.02	North - Tea... North - Tea...	analyst programmer - C++
-		Slow	slw@gmail.com		18.01	South	programmer - C++
✓		Fast			19.01 19.02	East East	programmer - C++ programmer - V Basic
-		Think			20.02 20.03	West West	analyst designer
✓		Consider			21.01 21.02	South South	programmer - PHP programmer - V Basic

form.vacation_group.title

Name: programmer

Description:

Submit Cancel

5 add employees to the group calendar

3.6.3.3 Submit a vacation request

Step by step

1. Click the **New request** button.

Urlaubsanträge

Mandant: Produktion Team: - Alle Teams - Jahr: 2024 Filter:

Neuer Antrag

Aktion	Urlaubsart	Status	Dauer	Vorname	Nachname	Anfang	Ende	Gestellt am	Gestellt von	Genehmigt von
U	Beantragt	2	Andreas	Weiss	18.01.2024	19.01.2024	17.11.2023	Admin AdminMan		Admin AdminMan

2. In the **New request** dialog, enter the following information:

- select an employee from the list
- start and end of the vacation
- vacation type
- optionally, a comment

Neuer Antrag

Mitarbeiter:

test_user

Freigabe durch:

Admin AdminMan

Anfang:

04.12.2023

Ende:

06.12.2023

Urlaubsart:

Urlaub

Urlaub

Schulung

Krankheit

Kommentar:

☐ Urlaubsantrag genehmigen

Speichern

Abbrechen

Check the result

The request appears in the request list. If a user has the **Vacation planning supervisor** user role, they can approve the request.

Request for vacation											
Create Client: EN_2016 Year: 2016 Filter: Login											
Action	Request								Approval		
	Type	Duration	First name	Last name	Start	Finish	Request or	Provided by	Status	Appro...	Approved by
Overlapping with the activity: system requirements Start: 03/11/2016 15:00 Finish: 03/15/2016 14:00 Overlapping with the activity: unit testing Start: 03/10/2016 08:00 Finish: 03/15/2016 16:00	V	2	Eager		03/11/2016	03/14/2016	03/04/2016	Admin AdminMan	Applied for		Admin AdminMan

Requests can be edited, accepted, and deleted. If there is an overlap between vacation days and scheduled work, the symbol  appears in the **Actions** column.

Request

Employee:

Eager

Release by:

Admin AdminMan

Start:

03/11/2016

Finish:

03/14/2016

Type:

Vacation

Comment:

Submit

Cancel

3.6.3.4 Calendar

Vacation calendar																																		
Client: EN_2016				Team:		Year: 2016		Month: January		Filter:		Login																						
First name	Last name	e-mail	Calendar	January																														
				1					2					3					4					5										
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
				Sa	Su	Mc	Tu	We	Th	Fr	Sa	Su	Mc	Tu	We	Th	Fr	Sa	Su	Mc	Tu	We	Th	Fr	Sa	Su	Mc	Tu	We	Th	Fr	Sa	Su	Mc
	Consider		Standard																															
	Diligent		Standard							V	V																							
	Eager		Standard																															
	Fast		Standard																															
	Goeslike	goeslike@...	Standard																															
	Sleeper		Standard																															
	Slow		Standard																															
	Superman	superman...	all																															
	Think		Standard																															
	Tidy		Standard																															

If non-working days are marked with an underscore K or , they were taken over from the resource pool of Rillsoft Project.

3.6.3.5 Event log

Event log of vacation planning

Client: Automatic plant: Date start: Date end: Filter:

Status	E-Mail	Message	Date
✓ 	info@rillsoft.de	new vacation request for approval 03/11/2016 - 03/14/2016 für Eager	03/04/2016 12:55:53

Dear ladies and gentlemen,

vacation request for approval:

Employee: **Eager**
start: 03/11/2016
finish: 03/14/2016

Best regards

3.6.3.6 Related topics

- [Vacation Import](#)
- [Retention period](#)
- [Configure add-ons](#)

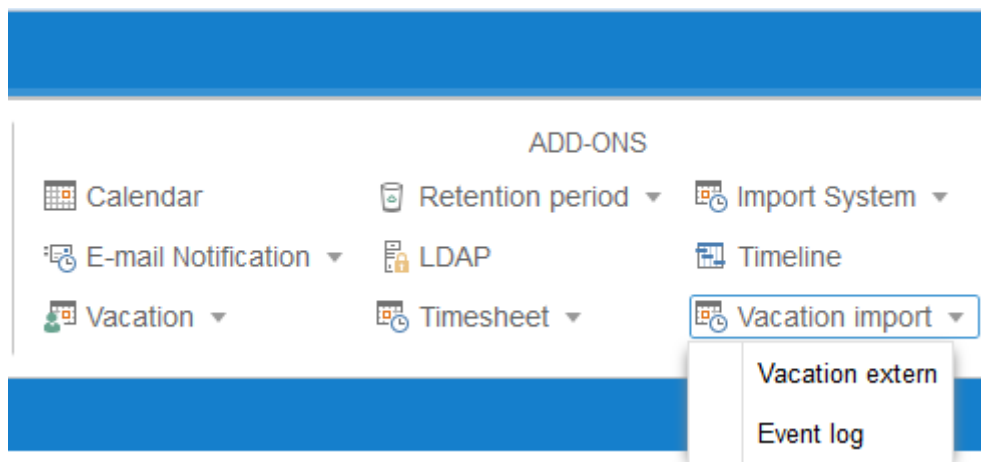
3.6.4 Vacation Import

Goal: you import non-working times from an external system into Rillsoft Project, so vacation and sick days are entered automatically in the resource pool.

Prerequisite: employees are identified by their e-mail address.

3.6.4.1 Step by step

1. Click the **Vacation Import** button.



2. Select the **External vacation** menu item. You get all projects ready for import from your external system.

Vacation extern				
Client: Mein Mandant		Filter:	Login	
Action	Unique ID	Personal key	Start of Update	Finish of Update
	294	heller@rillsoft.com	01/01/2014	12/31/2014
	293	heller@rillsoft.com		
	292	stone@rillsoft.com		
	291	heller@rillsoft.com	01/01/2014	
	290	stern@rillsoft.com	02/01/2014	03/31/2014
	289	stern@rillsoft.com	01/01/2014	12/31/2014

3.6.4.2 Check the result

After clicking **Event Log**, you can see whether the import completed successfully.

Event log of vacation planning				
Client: EN_2016		Automatic plant: Custom	Date start:	Date end:
			Filter:	Login
Status	E-Mail	Message	Date	
✓	info@rillsoft.de	new vacation request for approval 03/11/2016 - 03/14/2016 für Eager	03/04/2016 12:55:53	

Note

You can automate the import by creating a scheduled task under **Start > Control Panel > Administration > Task Scheduling**.

3.6.4.3 Related topics

- [Vacation planning](#)
- [Retention period](#)
- [Configure add-ons](#)

3.6.5 Retention period

Goal: you permanently delete projects marked as deleted and old resource pool revisions from the database.

If you delete a project for the first time, it is not actually removed from the database, only marked as deleted. This lets you restore the project later if needed — for example after an accidental deletion. The retention period module lets you permanently delete projects marked for deletion, and old resource pool revisions, from the database.

Prerequisite: in the client properties

Client list

+ Create

Filter:

Login

Actions	Company Name
      	Mein Mandant
      	EN_2016
      	New Client 2016

on the **Retention periods** tab, it is defined when projects, project revisions, and resource pool revisions marked for deletion should be permanently deleted.

Client

<

Main

Project settings

iCalendar

Retention period

Import System

Timeline

Vacation

>

Delete project revision

at the end of days

Delete resource pool revision

at the end of days

Delete projects are marked for deletion

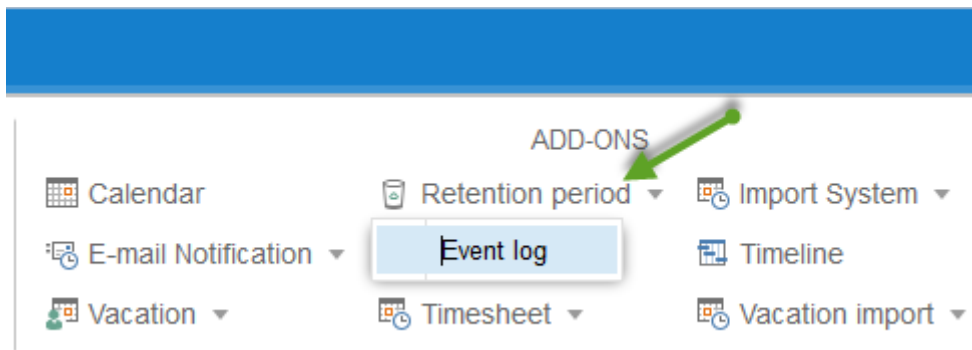
at the end of days

Submit

Cancel

3.6.5.1 Step by step

1. Click the **Retention period** button.



3.6.5.2 Check the result

After clicking **Event Log**, you can see which data was permanently deleted from the database.

Ereignisprotokoll von Datenvernichtung			
Mandant:	Beispiel_2014	Period:	Benutzerdefinier
Von:		Bis:	
Filter:			Anwenden
Status	E-Mail	Nachricht	Datum
✓		Nach Ablauf der Aufbewahrungsfristen sind 5 gelöschte Projekte (1648 Datensätze) aus der Datenbank gelöscht	18.07.2015 07:24:14

Note

- A folder is only permanently deleted once all projects it contains have been permanently deleted after the retention period.
- Permanently deleted projects/folders cannot be restored.
- Returning to a deleted revision (project/resource pool) is not possible.

Note

You can automate the retention period process by creating a scheduled task under **Start > Control Panel > Administration > Task Scheduling**.

3.6.5.3 Related topics

- [Vacation Import](#)
- [Configure add-ons](#)

3.6.6 Timesheet

Goal: you record working times (timesheets) for a project and have them approved.

The timesheet module lets project members record the time they spent on a project.

Functions

- Activity-related recording of employees' working time and remaining effort.

- Approval of recorded working times and remaining effort, based on the timesheet organization chart.
- Schedule adjustments in the project after taking over approved data.

Access rights

To **record timesheets**, a user needs:

- the **Project user** user role — allows reading portfolios and a resource pool,
- the **Root folder user** folder role — allows reading projects and entering timesheets.

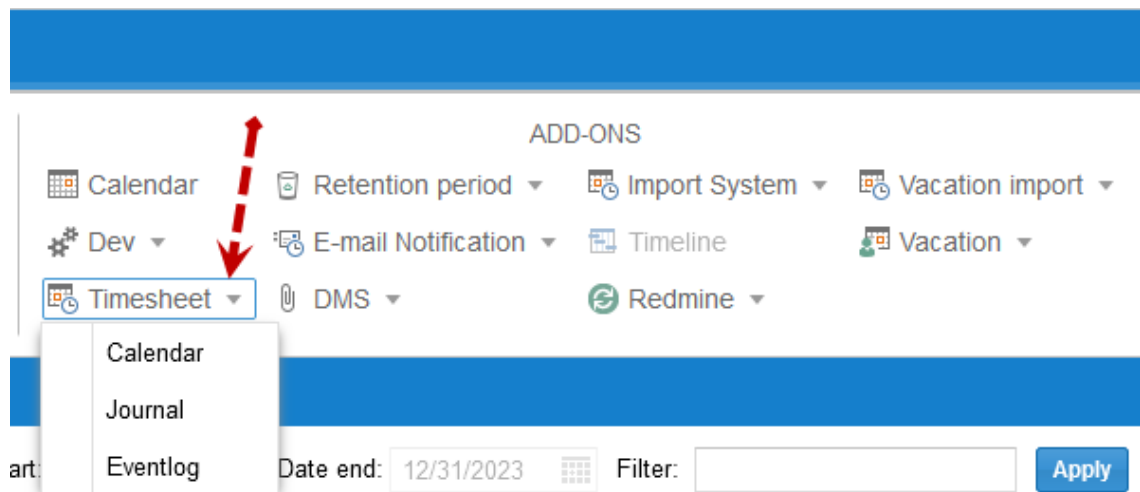
To **accept timesheets**, a user needs:

- the **Root folder administrator** folder role,
- the **Project user** or **Project manager** user role.

The Root folder administrator folder role also includes functions such as **Read project** and **Accept timesheet**.

3.6.6.1 Step by step: open the timesheet calendar

1. Click the **Timesheet** button and select the **Calendar** menu item.



Check the result

You see employees' scheduled, reported, and accepted working times in a calendar bar, with time and resource filters.

Timesheet calendar																				
Client: EN_2016		Employee: - All Employees -		Automatic plant: Custom		Date start: 02/01/2016		Date end: 04/25/2016		Filter:		Login								
Actions	Project	Activity	Employee	Effort	Close	Open	Close i...	6							7					
								1	2	3	4	5	6	7	8	9	10	11	12	
								Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	
	test_email	m2	Superman	48.00	48.00	0.00	100 %	3.00												
	Project1	task 4	Tidy	65.00	65.00 +65	0.00 -65	100 % +100	8.00	8.00	8.00	8.00	8.00			8.00	1.00				
	Project1	task 2	Eager	40.00	40.00	0.00	100 %	8.00	8.00	8.00	8.00	8.00								
	2016_2_soft	software developme...	Think	16.00	0.00	16.00	0 %			8.00	8.00									
	2016_2_soft	system test planning	Eager	48.00	0.00	48.00	0 %			8.00	8.00	8.00			8.00	8.00	8.00			
	test_email	m5	Tidy	24.00	8.00 +8	16.00 -8	33 % +33	Plan: 8.00							8.00	8.00				
	test_email	m3	Tidy	54.00	0.00	54.00	0 %	Accepted: 8.00								6.00	8.00	8.00		
	2016_2_soft	software installation...	Fast, Think	68.00	0.00	68.00	0 %	Reported: 0.00											16.00	
	2016_2_soft	software transition p...	Sleeper, Eager	80.00	0.00	80.00	0 %												16.00	
	test_email	m4	Diligent	40.00	0.00	40.00	0 %												8.00	

- **Green** — accepted timesheets.
- **Yellow** — reported but not yet accepted timesheets.
- **Blue** — scheduled working times.

3.6.6.2 Enter worked hours

Worked hours can be entered in three ways: directly in the calendar area, quickly via a predefined percentage in the **Actions** column, or via an input form with more information.

Enter in the calendar area

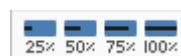
1. In the calendar area, click the cell where you want to enter the timesheet.

Timesheet calendar																				
Client: EN_2016		Employee: - All Employees -		Automatic plant: Custom		Date start: 02/01/2016		Date end: 04/25/2016		Filter:		Login								
Actions	Project	Activity	Employee	Effort	Close	Open	Close i...	6							7					
								1	2	3	4	5	6	7	8	9	10	11	12	
								Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	
   	test_email	m2	Superman	48.00	48.00	0.00	100 %	3.00												
   	Project1	task 4	Tidy	65.00	65.00 +65	0.00 -65	100 % +100	8.00	8.00	8.00	8.00	8.00			8.00	1.00				
   	Project1	task 2	Eager	40.00	40.00	0.00	100 %	8.00	8.00	8.00	8.00	8.00								
   	2016_2_soft	software developme...	Think	16.00	0.00	16.00	0 %		8.00	8.00										
   	2016_2_soft	system test planning	Eager	48.00	0.00	48.00	0 %			8.00	8.00	8.00			8.00	8.00	8.00			
   	test_email	m5	Tidy	24.00	0.00	24.00	0 %					8.00			8.00	8.00				
   	test_email	m3	Tidy	54.00	0.00	54.00	0 %									6.00	8.00	8.00		
   	2016_2_soft	software installation...	Fast, Think	68.00	0.00	68.00	0 %												16.00	
   	2016_2_soft	software transition p...	Sleeper, Eager	80.00	0.00	80.00	0 %												16.00	
   	test_email	m4	Diligent	40.00	0.00	40.00	0 %												8.00	

2. Enter the corresponding number.

Enter via a predefined percentage

1. In the **Actions** column, click one of the icon buttons to quickly enter a completed percentage.



Enter via an input form

If you want to enter not just worked hours but also notes or working times that differ from the schedule:

1. Click the **Note with a pen** button.



2. Enter the desired information in the input form.

Timesheet

Project: 2016_2_soft

Activity: system test planning

Start: 02/03/2016

Finish: 02/11/2016

Eager

Employees: 17.01 Eager (15.001 analyst)

Effort: 48.00

Remain:

Completed:

Notes:

Add note

directly enter effort

enter different times

scheduled times apply

Day	Plan		Fact, accepted		Fact, made	
	Effort	Time	Effort	Time	Effort	Time
02/03/2016	8.00	08:00-12:00;13:00-17:00			6.00	08:00-12:00;13:00-15:00
02/04/2016	8.00	08:00-12:00;13:00-17:00			8.00	08:00-12:00;13:00-17:00
02/05/2016	8.00	08:00-12:00;13:00-17:00			9.00	10:00-19:00
02/06/2016						
02/07/2016						
02/08/2016						
02/09/2016	8.00	08:00-12:00;13:00-17:00				
02/10/2016	8.00	08:00-12:00;13:00-17:00				
02/11/2016	8.00	08:00-12:00;13:00-17:00				
02/12/2016						

Submit

Cancel

The green tick in the **Actions** column shows that the reported hours have already been approved or still need to be accepted.

3.6.6.3 Related topics

- *iCalendar*
- *Data Management System (DMS)*
- *Configure add-ons*

3.6.7 Data Management System (DMS)

Goal: you manage project documents in an audit-proof way, in a freely definable folder structure.

The Data Management System (DMS) module lets you manage project documents.

Functions

- Documents can be stored together with a project, subproject, or task in a predefined folder structure.
- All documents are stored in an audit-proof way.
- All document revisions can be retrieved and restored.

Access rights

Minimum access rights to read project documents:

- User roles: **Read documents, Read resource pool**
- Folder role: **Read project**

Depending on your needs, the following user roles can additionally be assigned: **Create documents, Change documents, Delete documents, Restore documents, Manage folder structure.**

3.6.7.1 View and manage documents

Step by step

1. Select **Add ons > DMS > Documents**.

Action	Folder	Filename	Description	Size	Aktivitz / Subproject	Project name	project_grid.column.way	Last saved on	Last saved by
X	Root Folder->2023->Verträge	06_07_2012_vst...		272.73 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Verträge	04_07_2012_bd...		26.30 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Verträge	02_07_2012_sipg...		101.90 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Angebote	A14889.pdf		113.41 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Fachunt...	Fachtechnische ...		11.55 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Bilder	softwaredevelop...		17.62 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Fachunt...	Handbuch Arbeit...		942.76 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X	Root Folder->2023->Fachunt...	Abnahmeprotokol...		8.51 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan

Check the result

You see all documents assigned to the projects or their activities. In the **Actions** column, you can delete documents, display them, track their versioning, or restore deleted documents.

Note

- When a project is deleted, its associated documents are also deleted; when the project is restored, its documents are restored as well.

- Deleted documents are permanently deleted from the database once the retention period has expired.

3.6.7.2 Limit document size

Step by step

- Click **Administration > Clients > Edit**.

Rillsoft Integration Server 9.36.195

ADMINISTRATION

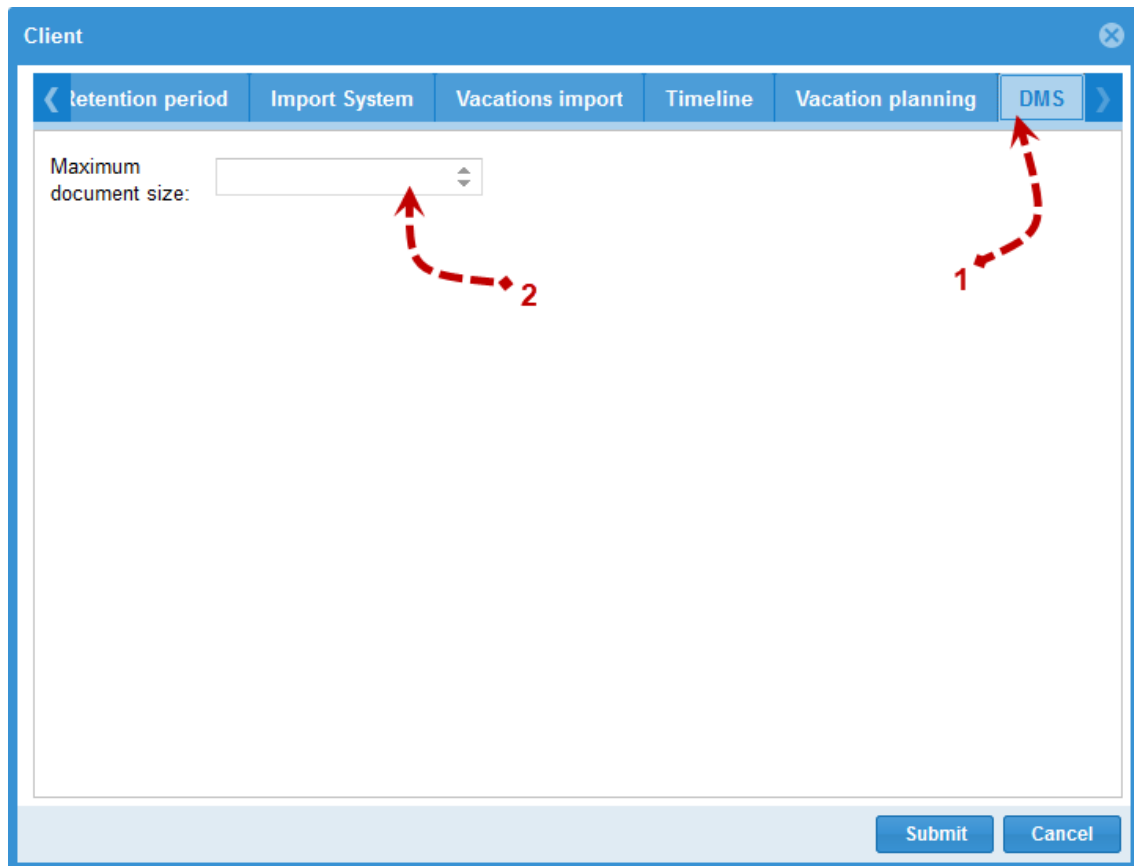
Users Clients Client release Organisation chart User roles Folders Folder roles

Client list

+ Create Filter: Apply

Actions	Company Name
      	Dummy
      	Construction
      	Maschinenbau
      	Produktion
      	EN

- Enter the maximum size.



3.6.7.3 Folder structure

Rillsoft Integration Server 9.36.195

ADMINISTRATION

- Users
- Clients
- Organisation chart
- Folders
- Client release
- User roles
- Folder roles

PROJECTS

- Locks
- Projects
- Portfolio
- Links

RESOURCE POOL

- Employees
- Employee role
- Teams

ADD-ONS

- Calendar
- Retention period
- Import System
- Dev
- E-mail Notification
- Timeline
- Timesheet
- DMS
- Redmine

Documents

Client: Produktion Apply

Folder structure	Action	Number of doc...	Notes
Root Folder		0	
2022		0	
2023		0	
Angebote		1	
Verträge		3	
Fachunterlagen		3	
Bilder		1	

You can freely define the folder structure.

Note

- The document folder structure is managed in Rillsoft Integration Server for the entire client and applies to all of the client's projects.
- When a DMS folder is deleted, its documents are moved to the main folder.

3.6.7.4 Related topics

- *Timesheet*
- *Retention period*
- *DMS integration in depth* — access rights model and relationship to the retention period
- *Configure add-ons*

3.6.8 Timeline

Goal: you display scheduled activities in the browser as a time scale — for a user, several users, a client, a portfolio, or a single project.

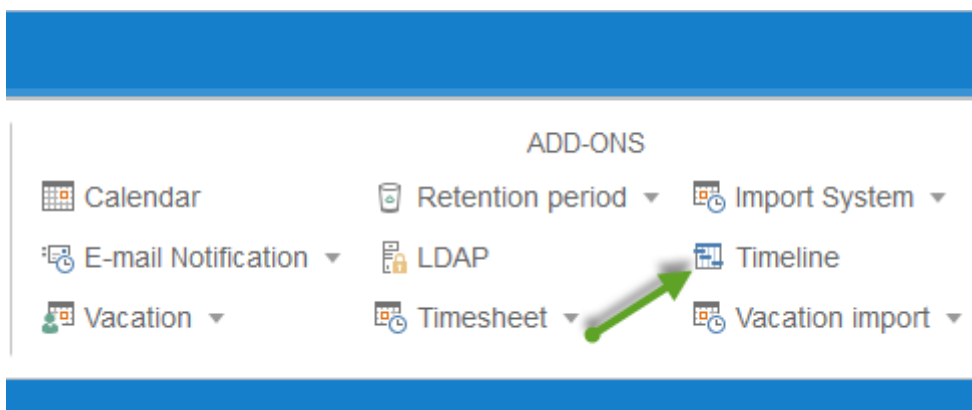
The module displays activities on a time scale in the browser window and delivers the current state of scheduled activities on every access.

Functions

- **User timeline** shows all of the user's activities across projects, per client.
- **Timeline of subordinate users** shows all activities of subordinate users (based on the administration organization chart) across projects, per client.
- **Client timeline** shows all of the client's activities across all projects.
- **Portfolio timeline** includes all activities of a project portfolio.
- **Project timeline** provides all activities of a project.

3.6.8.1 Step by step

1. Click the **Timeline** button.



2. Select one of the tabs — as described in the functions, five different timeline types are available.

3.6.8.2 Check the result

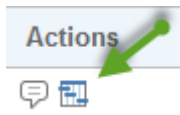
You see the timeline list. Move the mouse over a speech bubble to see information about projects and employees.

User: admin			
User timeline	Timeline of subsidiaries users	Client timeline	Portfolio timeline
Actions	Client	Portfolio	URL
	EN_2016	2011_portfolio	http://localhost/ris6/api/timeline/getevents?api_key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&portfolio_id=1
	EN_2016	2016_portfolio	http://localhost/ris6/api/timeline/getevents?api_key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&portfolio_id=2
	EN_2016	New portfolio	http://localhost/ris6/api/timeline/getevents?api_key=fec3f6d54e1cfa72ac97229409d3c842&client_id=21&portfolio_id=3
EN_2016 software development process (2015-11-23 - 2016-01-25) Project1 (2016-01-26 - 2016-02-16) new_software development process (2016-01-27 - 2016-03-29) Project2 (2016-03-09 - 2016-03-29) 2016_2_soft (2016-02-03 - 2016-02-24) --- Mitarbeiter --- -----			

3.6.8.3 Open the timeline in the browser window

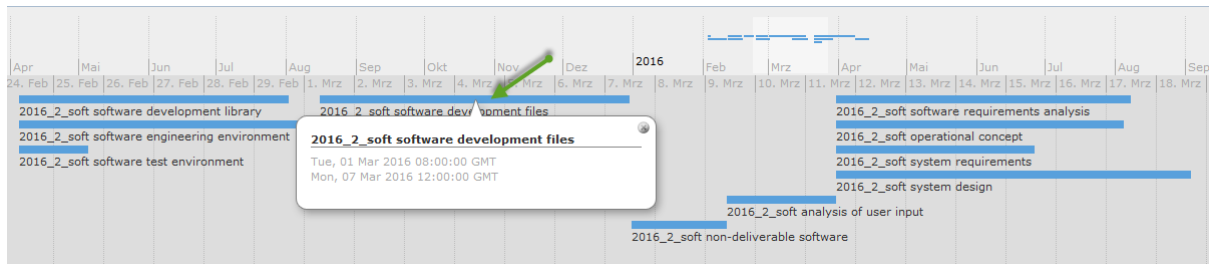
Step by step

1. In the **Actions** column, click the **Timeline** button.



Check the result

The project information is displayed in timeline form in the browser window.



3.6.8.4 Related topics

- [iCalendar](#)
- [E-mail notification](#)
- [Configure add-ons](#)

set up icalendar, set up time entry, icalendar, time entry, feedback, holiday planning, dms, timeline, email notification, it-administration

3.7 Troubleshooting

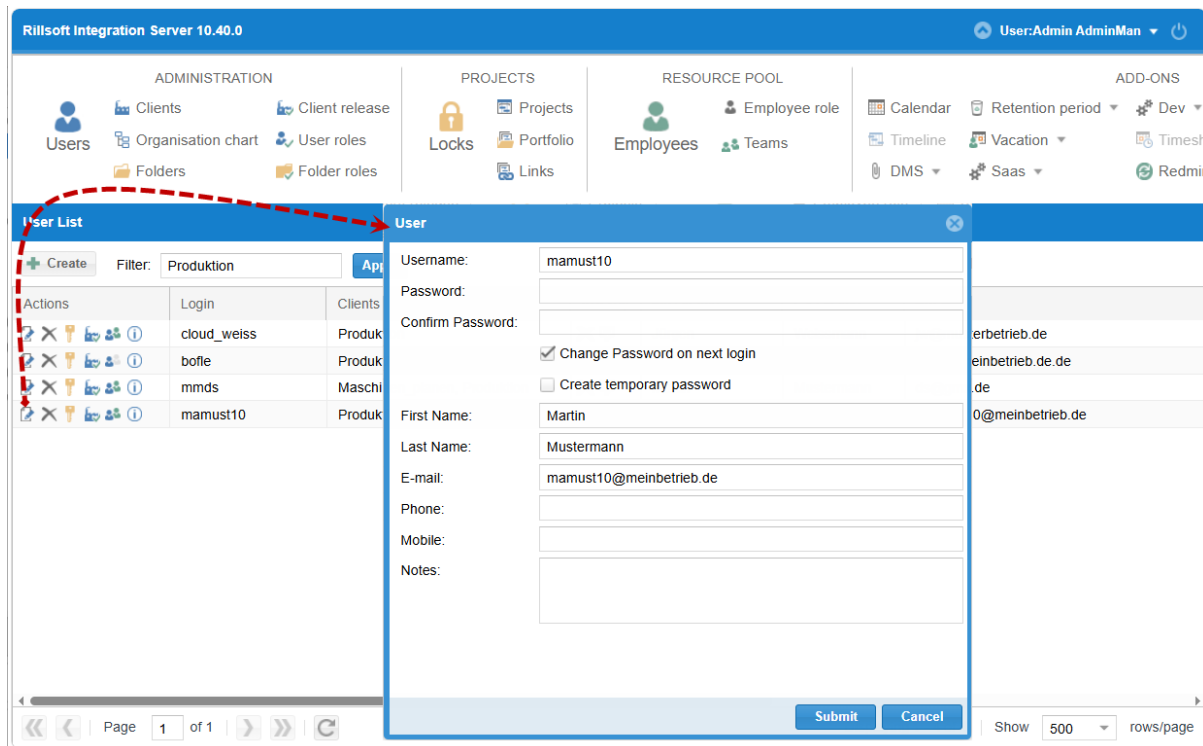
Diagnostic articles for the most common access and synchronization problems in Rillsoft Integration Server.

Note

The topic list below is preliminary and has not yet been validated against real support cases with the support team (matching the note on `ris-doc.rillsoft.de`). Review the topic list before publication.

3.7.1 Why can't a user log in?

Most often it is due to incorrect or expired credentials, a user connected via LDAP who has not yet been imported into Rillsoft Integration Server, or the user has been deleted. First check under **Administration > Users** whether the user is still listed there.



3.7.1.1 Symptom

A user enters their credentials, but the login to Rillsoft Integration Server fails.

3.7.1.2 Possible causes

1. The credentials (username/password) are incorrect or expired.
2. The user logs in via LDAP/Active Directory but has not yet been imported as a user in RIS. LDAP integration is available exclusively on the on-premises server, see [Expert Knowledge](#).

3. The user has been deleted in RIS.

3.7.1.3 Check steps

1. Go to **Administration > Users** and check whether the user appears in the active user list, see [Manage users and permissions](#).
2. If the user is supposed to log in via Active Directory: under **Add ons > LDAP**, check whether the user has already been imported from the AD list via the **Person-Plus** button, see [Expert Knowledge](#).

3.7.1.4 Action

- **Credentials incorrect/expired:** A new, temporary password can be sent to the user via an e-mail template, see [E-mail templates list](#).
- **LDAP user not yet imported:** Import the user from the AD list via the **Person-Plus** button — afterwards they can log in with their usual password.
- **User deleted:** Rillsoft Integration Server provides the access right **Restore deleted user**, see [User roles](#). Alternatively, create the user again, see [Create your first user and assign a role](#).

3.7.1.5 Related topics

- [Manage users and permissions](#)
- [Expert Knowledge](#) — LDAP integration

login problem, login failed, user deleted, ldap not applied, user, account, access, client sharing, it-administration

3.7.2 Why is a resource pool not synchronized?

Most often the resource pool is locked for editing by another user, or the user has no client sharing for the affected client. First check under **Locks > Locked resource pools** whether the pool is currently open by someone else.

The screenshot shows the Rillsoft Integration Server 10.40.0 interface. The top navigation bar includes 'ADMINISTRATION', 'PROJECTS', 'RESOURCE POOL', and 'ADD-ONS'. The 'RESOURCE POOL' section is active, showing 'Employees' and 'Teams'. Below this, there's a 'Filter' input field and an 'Apply' button. A red dashed arrow points from the 'Apply' button to the 'Locked resources pool' tab. The 'Locked resources pool' tab is selected, and it displays a table with the following data:

Action	Resources pool loc...	IP-adress of user	User name
X	08/18/2026 15:21:00	109.90.121.45	Admin AdminMan

3.7.2.1 Symptom

Changes to the resource pool (e.g. new employees, changed roles) do not appear as expected in Rillsoft Project, or the resource pool cannot be opened/edited.

3.7.2.2 Possible causes

1. The resource pool is locked for editing by another user.
2. The user has no client sharing for the client whose resource pool is to be edited.
3. An older resource pool version is displayed instead of the current one.

3.7.2.3 Check steps

1. Go to **Locks > Locked resource pools** and check whether the resource pool is currently locked, see [Lock](#).
2. Go to **Administration > Users** and check the affected user's client sharing, see [Define a user's client access](#).
3. Go to **Administration > Clients** and use the resource pool icon to check the existing resource pool versions, see [Resource pool versions of a client](#).

3.7.2.4 Action

- **Resource pool locked:** With the appropriate access rights, remove the lock under **Locks > Locked resource pools**, see [Lock](#).
- **Missing client sharing:** Grant the user client sharing, see [Define a user's client access](#).
- **Wrong/old version:** Restore the desired resource pool version, see [Resource pool versions of a client](#).

Note

The actual opening/connecting of the resource pool in the client happens in Rillsoft Project itself and is described there, see [Connect the resource pool to Rillsoft Project](#).

3.7.2.5 Related topics

- [Resource pool and teams](#)
- [Manage clients](#)

resource pool locked, resource pool synchronization, resource pool not updating, resource pool, personnel, employees, teams, roles, resource-manager, it-administration

3.7.3 Why doesn't iCalendar sync work?

Most often the user is missing the **iCalendar user** user role or a valid API access key, or the iCalendar template has not yet been defined for the client. First check under **Administration > Users** whether the user has an API access key.

The screenshot shows the 'User List' page in the Rillsoft Integration Server 10.40.0. The page has a blue header with the title 'Rillsoft Integration Server 10.40.0' and a user profile 'User:Admin AdminMan'. Below the header is a navigation bar with tabs for ADMINISTRATION, PROJECTS, RESOURCE POOL, and ADD-ONS. The ADMINISTRATION tab is active, showing sub-tabs for Users, Clients, Organisation chart, Folders, Client release, User roles, and Folder roles. The Users sub-tab is selected, displaying a list of users. The list has columns for Actions, Login, Clients, API key, First Name, Last Name, and Email. There are four users listed: cloud_weiss, bofle, mmds, and mamust10. Red arrows indicate the steps to check the API key for a user: 1. Click on the 'Users' tab in the navigation bar. 2. Click on the 'API key' column header. 3. Click on the 'API key' cell for the user 'cloud_weiss'.

Actions	Login	Clients	API key	First Name	Last Name	Email
	cloud_weiss	Produktion		Jürgen	Weissmann	jw@musterbetrieb.de
	bofle	Produktion		Bodo	Fleissig	bofle@meinbetrieb.de.de
	mmds	Maschinen_planen, Produktion		Martin	Mustermann	ds@gmx.de
	mamust10	Produktion		Martin	Mustermann	mamust10@meinbetrieb.de

3.7.3.1 Symptom

Appointments from Rillsoft Project do not appear, or are not current, in the external calendar program (e.g. Outlook), even though iCalendar sync should be set up.

3.7.3.2 Possible causes

1. The user does not have the **iCalendar user** user role.
2. No API access key has been generated for the user, or the key is outdated or entered incorrectly in the external calendar program.
3. The iCalendar template (which information is shared) has not been defined for the client.

3.7.3.3 Check steps

1. Go to **Administration > User roles** and check whether the **iCalendar user** role is assigned to the user, see [User roles](#).
2. Go to **Administration > Users** and check, in the **API access key** column, whether an access key exists for the user, see [Users](#).
3. Go to **Administration > Clients > Edit > iCalendar tab** and check whether information is defined there, see [iCalendar](#).

Rillsoft Integration Server 10.40.0
User:Admin AdminMan

ADMINISTRATION

Users

Clients

Client release

Organisation chart

User roles

Folders

Folder roles

PROJECTS

Locks

Projects

Portfolio

Links

RESOURCE POOL

Employees

Employee role

Teams

ADD-ONS

Calendar

Retention period

Dev

Timeline

Vacation

DMS

Saas

Timesh

Redmi

The user's roles: Martin Mustermann

	User role															Folder role									
Client	Administrator	Mandant Administrator	Projektmanager	Projektbenutzer	iCalendar Nutzer	Urlaubsplanung Nutzer	Urlaubsplanung Vorgesetzter	Timeline Nutzer	Rückmeldung Nutzer	Rückmeldung Vorgesetzter	Document Management Nutzer	Root-Verzeichnis Administrator	Root-Verzeichnis Manager	Root-Verzeichnis Benutzer	Team 1	Team 2	Team 3	Team 4	Team 5	Partner 1	Partner 2	Partner 3	Partner 4	Partner 5	
Produktion	-	-	-	-	✓	✓	-	-	✓	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Page 1 of 1
Displaying 1 - 1 of 1
Show 25 rows/page

3.7.3.4 Action

- **Missing role:** Assign the user the **iCalendar user** user role, see [Customize user access rights](#).
- **Missing/outdated API access key:** Generate a new API access key and enter it in the external calendar program, see [Users](#).
- **Missing iCalendar template:** Define the iCalendar information for the client, see [iCalendar](#).

3.7.3.5 Related topics

- [Configure add-ons](#)
- [Expert Knowledge](#) — API access keys and iCalendar

icalendar not working, icalendar not syncing, api access key missing, icalendar, time entry, feedback, holiday planning, dms, timeline, email notification, project-manager, it-administration

3.7.4 Why doesn't a user see a project or portfolio?

Most often the user is missing client sharing for the affected client. If only a single project is missing, it is usually due to a missing folder role with read access for the folder the project is stored in. If a portfolio is missing, it is usually due to a missing user role with the **Read portfolio** right.

Rillsoft Integration Server 10.40.0
User: Jürgen Weissmann

ADMINISTRATION

Users

Clients

Organisation chart

Folders

Client release

User roles

Folder roles

PROJECTS

Locks

Projects

Portfolio

Links

RESOURCE POOL

Employees

Employee role

Teams

ADD-ONS

Calendar

Vacation

User account

Retention period

Timesheet

Ticket system

E-mail

DMS

Redn

Client Access List

Filter:

Login	First Name	Last Name	Construction	Produktion
cloud_weiss	Jürgen	Weissmann	✓	✓
boffe	Bodo	Fleissig	-	✓
a_test_del34r	Tanja	Vasil	✓	-
mmds	Martin	Mustermann	-	✓
bdfs	Bodo	Fleissig	-	-
ussch	Udo	Schwarz	-	-
aw	Andreas	Weiss	-	-
nschw	Niko	Schwarzmann	-	-

Assign access rights/escape for client

Page 1 of 1
Displaying 1 - 12 of 12
Show 25 rows/page

3.7.4.1 Symptom

A user does not see a particular project or portfolio in Rillsoft Project or Rillsoft Integration Server, even though it exists.

3.7.4.2 Possible causes

1. The user is missing client sharing for the client the project/portfolio belongs to — in that case, they see no information about that client at all.
2. **Only one project is missing:** the user is missing a folder role with the **Read project** right for the folder the project is stored in.
3. **A portfolio is missing:** the user is missing a user role with the **Read portfolio** right.

3.7.4.3 Check steps

1. Go to **Administration > Users** and check the user's client sharing, see [Define a user's client access](#).
2. If a project is missing: go to **Administration > Folder roles** and check whether the folder role assigned to the user includes the **Read project** right for the affected folder, see [Folder roles](#).
3. If a portfolio is missing: go to **Administration > User roles** and check whether the assigned user role includes the **Read portfolio** right, see [User roles](#).

3.7.4.4 Action

- **Missing client sharing:** Grant the user client sharing, see *Define a user's client access*.
- **Missing read access to the folder:** Assign the user a folder role with the **Read project** right for the affected folder, see *Folder roles*.
- **Missing portfolio read access:** Assign the user a user role with the **Read portfolio** right, see *Manage users and permissions*.

3.7.4.5 Related topics

- *Manage clients*
- *Manage users and permissions*
- *Share projects and portfolios*

project not visible, portfolio not visible, missing access rights, access rights, permissions, user roles, folder roles, manage permissions, it-administration, resource-manager

3.7.5 Why does floating license access fail?

Most often, the floating license is not assigned to the user, or all license seats are already in use. In the Rillsoft on-premises solution, a floating license that has not yet been activated can also be the cause. In Rillsoft Cloud, activation happens automatically after purchase. First check under **Locks > Locked floating licenses** whether all seats are currently in use.

Rillsoft Integration Server 10.40.0

User: Jürgen Weissmann

ADMINISTRATION: Users, Clients, Organisation chart, Folders, Client release, User roles, Folder roles

PROJECTS: Locks, Projects, Portfolio, Links

RESOURCE POOL: Employees, Employee role, Teams

ADD-ONS: Calendar, Vacation, User account, Retention period, Timesheet, Ticket system, E-mail, DMS, Redn

Filter: Apply

Locked projects | Locked resources pool | **Locked floating licenses**

Action	Serial number	Version	License locked at	IP-adress of user	User name
No records found					

Page 0 of 0 | No data to display | Show 25 rows/page

3.7.5.1 Symptom

A user cannot work with a floating license; access is denied.

3.7.5.2 Possible causes

1. On-premises solution only: the floating license has not yet been activated.
2. The user has not been assigned to the floating license.
3. All license seats are already in use by other users.

Note

Activating a floating license is only required on an **on-premises server**. In Rillsoft Cloud, activation happens automatically after purchase. In Rillsoft Cloud, first check above all whether the user has client sharing, see [Cloud vs. on-premises operation](#).

3.7.5.3 Check steps

1. Go to **Administration > Clients > shield icon** and check whether the user is assigned to the floating license. On the on-premises solution, also check whether the floating license is activated, see [Floating licenses of a client](#).
2. Go to **Locks > Locked floating licenses** and check whether all license seats are currently in use by other user sessions, see [Lock](#).

3.7.5.4 Action

- **License not activated:** Activate the floating license — only on the on-premises solution, see [Floating licenses of a client](#). In Rillsoft Cloud, activation happens automatically after purchase.
- **User not assigned:** Assign the user to the floating license, see [Floating licenses of a client](#).
- **All seats in use:** End a no-longer-needed user session under **Locks > Locked floating licenses** to free up a license seat, see [Lock](#).

3.7.5.5 Related topics

- [Floating licenses in detail](#)

floating license error, license in use, free up license seat, ris, integration server, cloud, on-premises, on-premises server, operating model, multi-user, it-administration

ROLE-BASED HELP

This section leads to the appropriate task, expert, and reference articles depending on your role. It does not duplicate content, but links to it purposefully.

4.1 IT administration

As an IT administrator, you set up Rillsoft Integration Server, manage clients, users and access rights, and keep it running — from initial setup through licensing and integrations to troubleshooting.

4.1.1 Initial setup

- *Set up RIS: server or cloud*
- *Create your first client*
- *Create your first user and assign a role*
- *Connect the resource pool to Rillsoft Project*

4.1.2 Day-to-day operation

- *Manage clients*
- *Manage users and permissions*
- *Enable Teamwork with Summary Projects* (multi-user work, summary projects, locks in team operation)
- *Configure add-ons* (retention periods/data deletion, DMS, email templates, among others)

4.1.3 In depth

- *Expert Knowledge* — LDAP integration (on-premises server only), floating licenses, among others

4.1.4 If you have problems

- *Why can't a user log in?*
- *Why does floating license access fail?*
- *Why doesn't a user see a project or portfolio?*

- *Troubleshooting* — all diagnostic articles

4.1.5 Look up

- *Reference System* — menu commands, administration overview

4.2 Project manager

As a project manager, you mainly use Rillsoft Integration Server to access shared projects and portfolios, and for time entry and calendar sync.

4.2.1 Projects and portfolios

- *Share projects and portfolios* — locks, project overview, portfolio, cross-project links, project import

4.2.2 Plan together with other project managers

- *Enable Teamwork with Summary Projects* — prerequisites for multi-user work and summary projects
- *Plan as a Team: Multi-User Work and Summary Projects* — working in Rillsoft Project (Rillsoft Project help)

4.2.3 Time entry and calendar sync

- *Configure add-ons* — time entry/feedback, iCalendar sync with Outlook, among others

4.2.4 If you have problems

- *Why doesn't a user see a project or portfolio?*
- *Why doesn't iCalendar sync work?*

4.2.5 Clarify responsibility

Access rights for clients, projects and portfolios are granted by IT administration, see *IT administration*.

4.3 Resource manager

As a resource manager, you maintain the resource pool as well as the roles and teams that Rillsoft Project uses for planning.

4.3.1 Getting started

- *Connect the resource pool to Rillsoft Project*

4.3.2 Maintain resource pool and teams

- *Resource pool and teams* — personnel, roles, teams

4.3.3 If you have problems

- *Why is a resource pool not synchronized?*

4.3.4 Clarify responsibility

Client sharing and access rights to the resource pool are granted by IT administration, see *IT administration*.

4.4 PMO / executive management

Note

This role is being expanded with dedicated PMO/executive management functionality in an RIS version planned for release by the end of 2026. Until that release, this page points to the cross-portfolio topics that already exist.

4.4.1 Available topics until the expansion

- *Share projects and portfolios* — cross-portfolio view of projects
- *Enable Teamwork with Summary Projects* — teamwork of several project managers, summary projects in the portfolio

4.4.2 Clarify responsibility

Access rights for clients and portfolios are granted by IT administration, see *IT administration*.

EXPERT KNOWLEDGE

This section covers advanced integration and operations topics for Rillsoft Integration Server.

5.1 LDAP

The LDAP interface lets you import existing users from a user management system such as Active Directory (AD) into Rillsoft Integration Server. This way, existing users and passwords can be managed centrally in one place in AD.

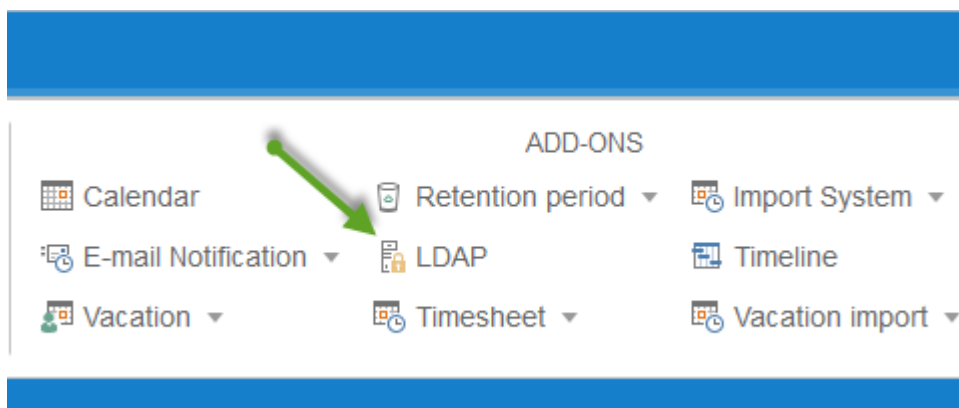
Note

LDAP integration is available exclusively on the **on-premises server**, not in the cloud variant of Rillsoft Integration Server, see *Cloud vs. on-premises operation*.

Functions

- User import from Active Directory
- User login via Active Directory

After clicking the **LDAP** button,



the login dialog for your LDAP server appears.

Log on to the LDAP server

Username:

Password:

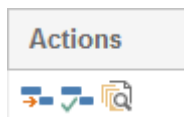
Login

After a successful login, you can see the list of all users registered in your LDAP.

User from LDAP directory							
Login:		First name:		Last name:		Department:	
						Company:	
						Login	
Actions	Login	First name	Last Name	Department	Company	Email	Phone
	babo	Allo	Babo	Maurer		allo.babo@rillsoft.de	
	bermoulli	Albuin	Bernoulli	Gerüstbauer		albuin.bermoulli@rillsoft.de	
	bilton	Adriano	Bilton	Dachdecker		adriano.bilton@rillsoft.de	
	boggs	Adelmann	Boggs	Raumausstatter		adelmann.boggs@rillsoft.de	
	bolzano	Adalmar	Bolzano	Baumaschinenführer		adalmar.bolzano@rillsoft.de	
	carr	Adalbot	Carr	Zimmerer		adalbot.carr@rillsoft.de	
	cassini	Ansas	Cassini	Fliesenleger		ansas.cassini@rillsoft.de	

5.1.1 Import LDAP users into Rillsoft

If you click the **Person-Plus** button in the **Actions** column, this person is imported as a user into Rillsoft and can log in with their usual password.



5.1.2 Related topics

- *Cloud vs. on-premises operation*
- *Why can't a user log in?*

ldap, active directory, import users from ad, ad integration, single sign-on, sso, it-administration

5.2 Floating licenses in detail

A floating license is not a fixed seat for a single user, but a shared license seat: several users can be assigned to the license, but only as many can work with it at the same time as there are license seats. This concept pays off especially when not all assigned users work with Rillsoft at the same time.

5.2.1 Assignment and activation

A floating license must be activated first before it can be assigned to users. The actual assignment, as well as creating new floating licenses, is described step by step in *Floating licenses of a client*.

Note

Activating a floating license is only required on an **on-premises server**. In Rillsoft Cloud, activation happens automatically after purchase. Users can be assigned to the floating license under both operating models, see [Cloud vs. on-premises operation](#).

5.2.2 When all license seats are in use

Since a floating license only allows a limited number of concurrent sessions, access can fail if all seats are already in use by other user sessions. You can see an overview of currently used floating licenses under **Locks > Locked floating licenses**, see [Lock](#). From there, a no-longer-needed session can be ended to free up the license seat again.

5.2.3 If you have problems

- [Why does floating license access fail?](#)

5.2.4 Related topics

- [Floating licenses of a client](#) — activate and assign a floating license
- [Lock](#) — view and free up used license seats

floating license, license seat, shared license, ris, integration server, cloud, on-premises, on-premises server, operating model, multi-user, it-administration

5.3 DMS integration in depth

The Document Management System (DMS) stores project documents in an audit-proof way in a client-wide folder structure. Two concepts matter here beyond plain operation: the access rights model and its relationship to data retention.

5.3.1 Access rights model

Like most RIS features, DMS access combines two independent role types:

- A **user role** with the **Read documents** right (minimum requirement), optionally supplemented with **Create documents**, **Change documents**, **Delete documents**, **Restore documents**, or **Manage folder structure**.
- A **folder role** with the **Read project** right for the folder the respective project is stored in — without this right, its documents are not accessible either.

For details on role assignment, see [Roles and permissions matrix](#).

5.3.2 Relationship to the retention period

Deleted documents are not removed immediately, but are only permanently deleted from the database once the retention period configured for the client has expired — the same mechanism that also applies to deleted projects and resource pool revisions, see [Retention period](#). If a deleted project is restored, its DMS documents are automatically restored with it.

The folder structure itself applies client-wide to all of the client's projects, not per project — restructuring it therefore affects all projects of that client.

5.3.3 Related topics

- [Data Management System \(DMS\)](#) — usage: view documents, limit document size, folder structure
- [Retention period](#) — retention periods and permanent deletion
- [Roles and permissions matrix](#)

dms permissions, dms retention period, document access rights, icalendar, time entry, feedback, holiday planning, dms, timeline, email notification, it-administration

5.4 API access keys and iCalendar in depth

The API access key is the central authentication mechanism a user relies on to access browser-based add-ons of Rillsoft Integration Server without logging in again — including iCalendar and timeline. Integrations with Redmine, holiday planning, or SAP also require an API access key according to the email templates, see [E-mail templates list](#).

5.4.1 Life cycle of an API access key

In the user list under **Administration > Users**, the **API access key** column offers the following actions, see [Users](#):

- Generate API access key
- Display API access key
- Switch to the user's iCalendar or timeline
- Send API access key to the user by e-mail
- Delete API access key

A deleted or no-longer-valid key is the most common cause when iCalendar sync suddenly stops working, see [Why doesn't iCalendar sync work?](#).

5.4.2 Prerequisite: the matching user role

An API access key alone is not enough — the user also needs the matching user role (e.g. **iCalendar user** for iCalendar), see [Roles and permissions matrix](#).

5.4.3 iCalendar template per client

Which appointment information is shared via iCalendar with external calendar programs such as Outlook is additionally defined per client via the iCalendar template — independent of the individual user's API access key, see *iCalendar*.

5.4.4 Related topics

- *Users* — manage API access keys
- *iCalendar* — iCalendar template and calendar types
- *Timeline* — timeline module (uses the same access-key mechanism)
- *E-mail templates list* — e-mail template for the API access key

api access key, api key, icalendar authentication, icalendar, time entry, feedback, holiday planning, dms, timeline, email notification, it-administration

5.5 Cloud vs. on-premises operation

Rillsoft Integration Server is available in two operating models:

- **Cloud** — hosted by Rillsoft, no own server required.
- **On-premises server** — operated on the company's own network.

Which of the two operating models a company chooses is usually decided once during initial setup, see *Set up RIS: server or cloud*.

5.5.1 Teamwork in both operating models

Multi-user work with summary projects, locks and cross-project links is available in both operating models, see *Enable Teamwork with Summary Projects*.

5.5.2 Feature difference: LDAP is on-premises only

The currently known functional difference between the two models concerns user management: **LDAP integration** (importing users from an existing Active Directory environment) is available exclusively on the on-premises server, not in the cloud variant, see *LDAP*.

Note

This page documents only the currently confirmed difference (LDAP). Further differences between cloud and on-premises operation (e.g. in maintenance, updates, or data storage) are not part of the existing RIS sources and are therefore deliberately not listed here.

5.5.3 Related topics

- [LDAP](#) — LDAP integration (on-premises server only)
- [Set up RIS: server or cloud](#)

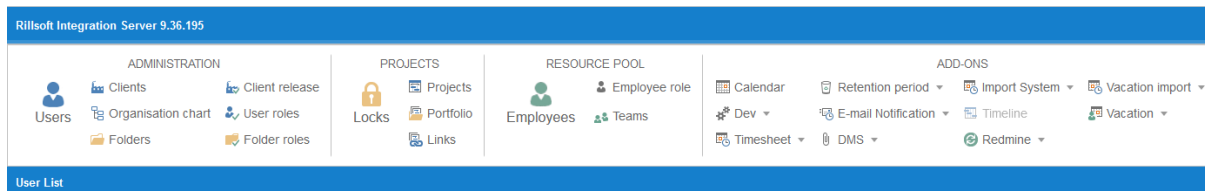
cloud vs on-premises, operating model comparison, ldap on-premises only, ris, integration server, cloud, on-premises, on-premises server, operating model, multi-user, it-administration

REFERENCE SYSTEM

This section is for looking up menu commands, the program interface and access rights.

6.1 Main menu Rillsoft Integration Server

After a successful login, the following functions are generally available:



ADMINISTRATION

- Users
- Clients
- Client release
- Organization chart
- User roles
- Folders
- Folder roles

ADD ONS

- iCalendar
- E-mail notification
- Vacation planning
- Retention period
- Timesheet
- Project Import
- Vacation Import
- DMS

PROJECT SCHEDULING

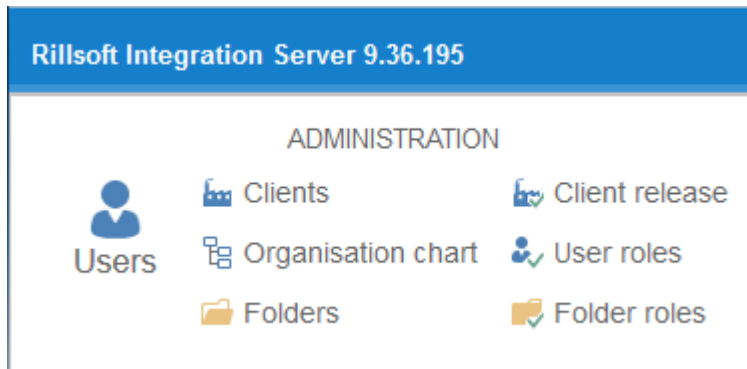
- Lock
- Projects
- Portfolio
- Links

RESOURCE POOL

- Personnel
 - Roles
 - Team
-

Which functions are available to a user individually depends on their rights.

6.2 Administration



Under this menu item you find all commands for managing users, clients, roles, and folder structures.

Users

A list of users is shown. Users are people who are allowed to work with Rillsoft Project via the interface to Rillsoft Integration Server. In Rillsoft Integration Server, users can be independent of clients.

Clients

As a rule, one resource pool is created for a single client. Accordingly, you should work with only one resource pool per client. If you want to draw resources from several resource pools, create several clients accordingly.

Client release

This function lets you control whether a user is allowed to work with a client at all. If client release has not been granted to a user, they see no information about that client, as if it did not exist.

Organization chart

The user organization chart shows the hierarchical structure for the following areas:

- Administration
- Timesheet
- Vacation planning

User roles

User roles define access rights for:

- User management
- Working with the portfolio
- Working with the resource pool
- Vacation planning
- Working with DMS
- Working with iCalendar

- Working with Timeline

Folders

Folders map the project landscape per client. They are virtual structures that can be organized by any criteria.

Folder roles

Folder roles are folder-dependent and are responsible for the access rights to the following activities:

- Working with folders
- Working with projects
- E-mail notification
- Timesheet
- iCalendar access

6.3 Roles and permissions matrix

Rillsoft Integration Server controls access rights through two independent, combinable role types: **user roles** (folder-independent) and **folder roles** (folder-dependent). A user usually holds both role types at the same time — for example the user roles **Project manager**, **iCalendar user**, and access to the timeline module, plus the folder role **Root folder user**.

Important

Not to be confused: the resource pool also has “roles” in the sense of employees’ **professional qualifications** (e.g. to group personnel by field of work). That is a separate concept unrelated to access rights, see [Roles](#).

6.3.1 User roles (folder-independent)

User roles define rights for activities that are not tied to a specific folder: user management, working with portfolios, the resource pool, holiday planning, and the iCalendar and DMS add-ons. Rillsoft Integration Server provides seven pre-defined user roles: **Administrator**, **Client Administrator**, **Project manager**, **Project user**, **iCalendar user**, **Vacation planning-user**, and **Vacation planning supervisor**.

Rights group	Example rights
User management	Create/change/delete users and clients; client sharing; manage roles; sync with LDAP/Redmine
Work with portfolio	Read/create/change/delete portfolio; cross-project links
Manage resource pool	Read/change/lock/unlock resource pool
Vacation planning	Change vacation account, enter/accept/cancel vacation, enter sick leave
Work with the iCalendar add-on	Read user/client/project/portfolio calendar
Work with DMS	Create/read/change/delete/restore documents, manage folder structure

Full list of rights and management: see [User roles](#).

6.3.2 Folder roles (folder-dependent)

Folder roles determine which projects a user may work with in a given folder, and how (read, change, etc.). Rights assigned to a parent folder apply by default to its subfolders as well.

Rights group	Example rights
Folder structure	Create/change/delete/restore folder
Project	Create/read/change/delete/lock/unlock project
Email notification	Watch project/milestone changes, negative effort, and cross-project link conflicts
Timesheet	Enter/accept timesheet
iCalendar & timeline	Access to add-on modules in the browser window

Full list of rights and management: see [Folder roles](#).

6.3.3 Assigning a user

How to assign both role types to a user is described step by step in *Customize user access rights*.

6.3.4 Related topics

- *User roles* — user roles in detail, create a new role
- *Folder roles* — folder roles in detail, create a new role
- *Customize user access rights* — assign roles to a user
- *Set up Rillsoft Integration Server for several project managers* — recommended rights by task in the team
- *Roles* — professional qualifications in the resource pool (different concept)
- *Reference System*

permissions matrix, user roles overview, folder roles overview, access rights, permissions, user roles, folder roles, manage permissions, it-administration

A dialog field reference is in preparation.

ris, integration server, client management, user management, cloud, on-premises, on-premises server, operating model, multi-user, it-administration

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