Rillsoft Integration Server

Release 9

Rillsoft GmbH

Sep 11, 2024

CONTENTS

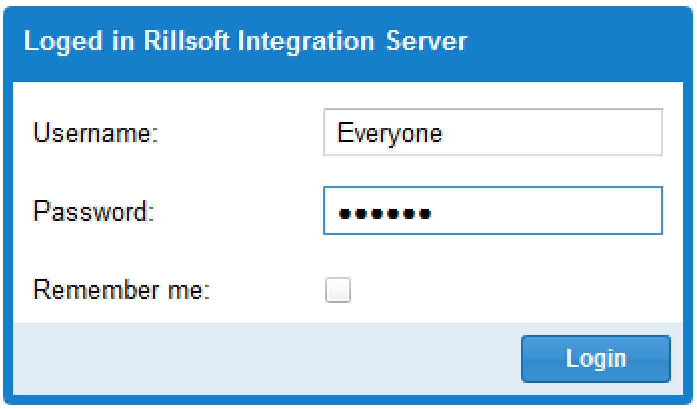
CHAPTER

ONE

ADMINISTRATION

1.1 Registration

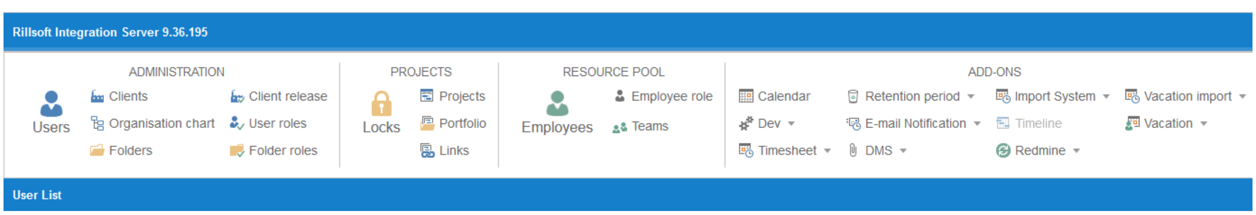
First, a registration is required.



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

1.2 Main menu Rillsoft Integration Server

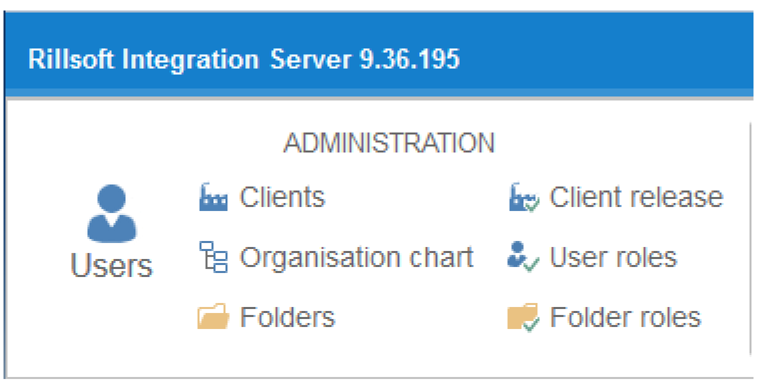
After successful registration the following functions are available:



ADMINISTRATION	ADDITIONAL MODULES
• Users • Clients • Clients share • Organization chart • User roles • Folders • Folder roles	• iCalendar • E-Mail notification • Vacation planning • Retention period • Projekt import • Timesheet • Vacation import • DMS
PROJECT SCHEDULING	**RESOURCEPOOL**
• Lock • Projects • Portfolio • Links	• Employees • Roles • Team

The available individual user functions depend on his rights.

1.3 Administration



In this menu item you will find all commands to manage the users, clients, roles and directory structures.

Users The list of users is displayed. Users are those who may work with Rillsoft Project with interface to the Rillsoft Integration Server. In the Rillsoft integration server the users may be independent from the clients.

Clients

Basically, a resource pool is created for an individual client. According to this, each client should work only with one resource pool. If you want to obtain resources from several resource pools, you should create several clients, accordingly.

Clients share

This function allows you to control whether a user should work with a client or not. If the clients share is not granted for a user, the user sees no client's information, as if there is no such a client.

Organization Chart

User organization chart displays the hierarchical structure/order for the following areas:

- Administration
- Timesheet
- Vacation planning

User roles

User roles define access rights to:

- User Management
- Work with portfolio
- Work with resource pool
- Vacation planning
- Work with iCalendar
- Work with Timeline

Folders

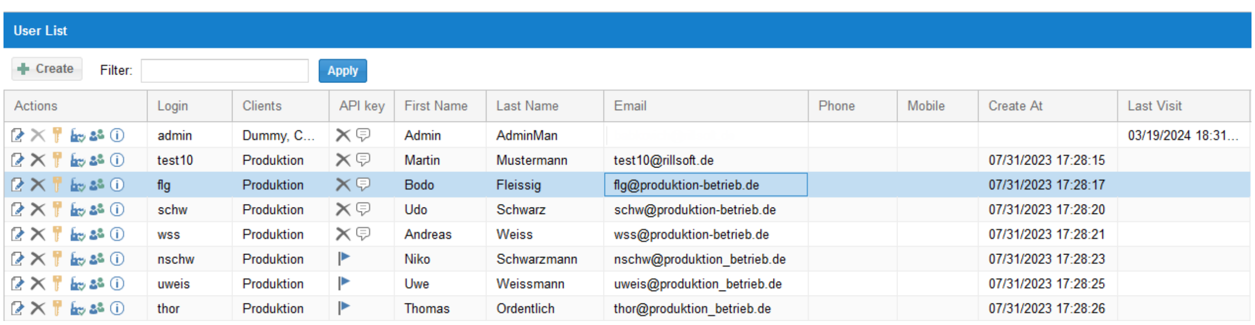
Folders display project landscape per clients. There are virtual structures, which can be created according to any criteria.

Folder roles

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

- Working with directories
- Working with projects
- E-mail notification
- Time sheet
- iCalender access

1.4 Users



All users who are allowed to work with the Rillsoft project and the Rillsoft Integration Serverare listed here.

Functions

- Create user – you can create a new user by clicking on the button **New user**.
- Change user – you can change user data such as name, phone, etc. by clicking on the icon button .
- Delete user – you can delete users by clicking on the icon button .

- Manage user rights – clicking on the icon button you can define client-specific to what folder and user roles the user belongs.
- Clients share for a user – clicking on the icon button you can define what clients the user is allowed to work with.
- Manage resources share for timesheet – after clicking on the icon button you can manage resources share for timesheet by marking the personal resources in a personal resource list obtained from the resource pool, where the user can enter the timesheet.
- After clicking on the button you can see all information about a user.

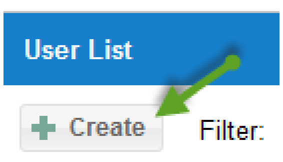
The column **API access key** offers the following options:

- generate API access key for a user
- show API access key
- switch to user's iCalender
- switch to user's timeline
- send an e-mail to the user with his API access key
- delete API access key for a user

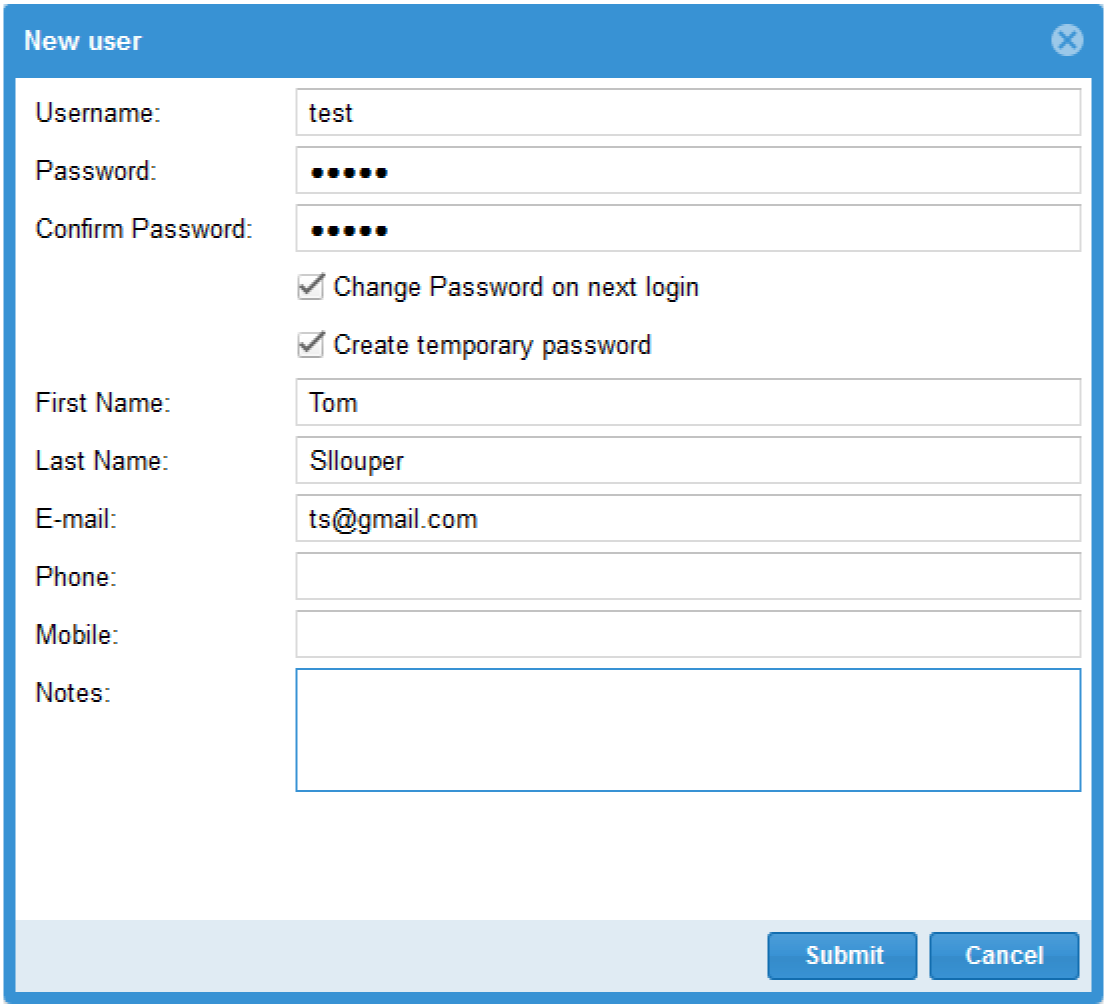
See too

1.4.1 New user

After clicking on the button

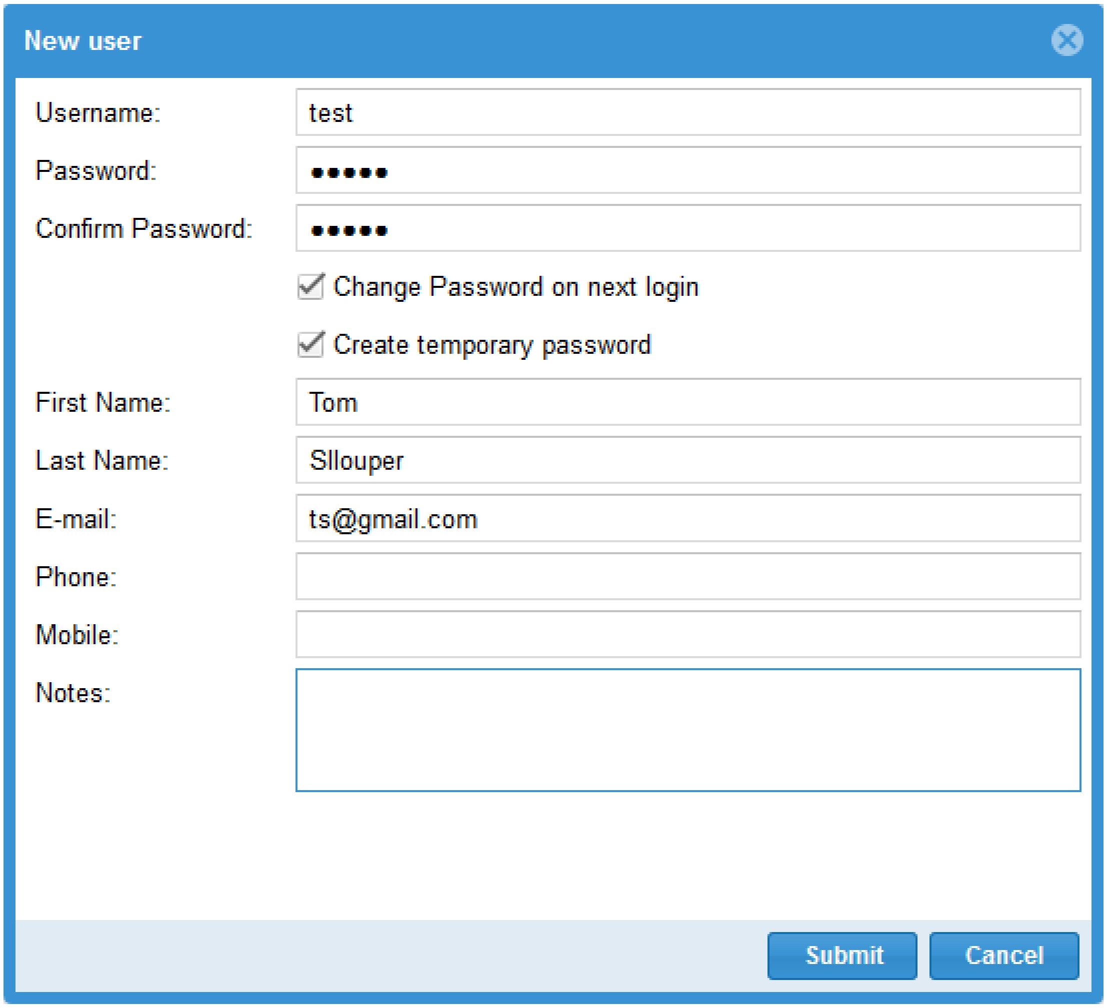


you can create a new user.



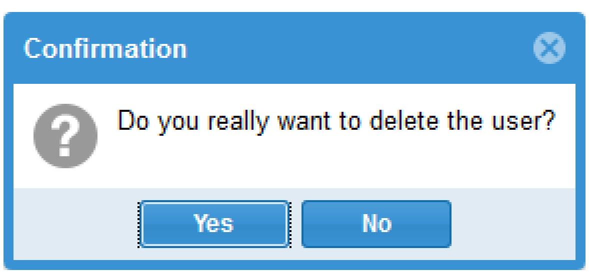
1.4.2 Edit user properties

After clicking on the button **Pen** you can edit user properties.



1.4.3 Delete user

To delete a user, click on the icon button ✕ and confirm with **Yes**, if necessary.

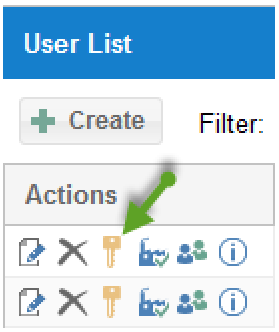


1.4.4 Customize User Access Rights

What information is available to a user, what activities he may carry out, what projects he may work with?

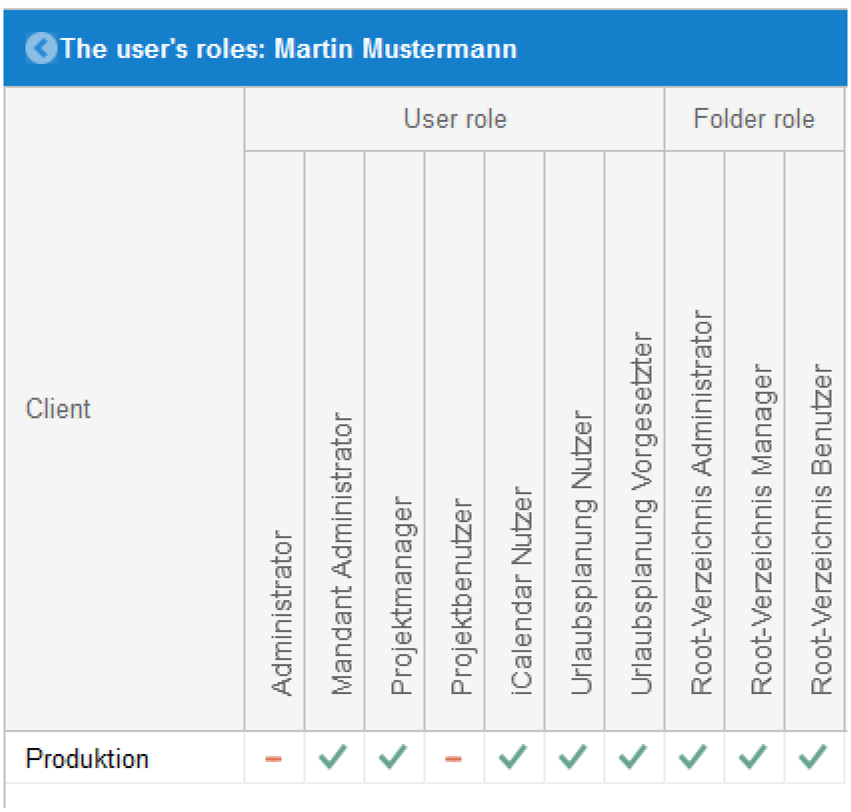
You can answer these questions by assigning access rights. You can define the rights of the user roles by clicking on the menu item Administration/User roles. You can determine the rights of the folder roles by clicking the menu item Administration / Folder roles.

First click on the button



in the column **Actions**.

Now click on or in the corresponding cell.



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 access rights of a user flexible and versatile:

- user roles
- folder roles

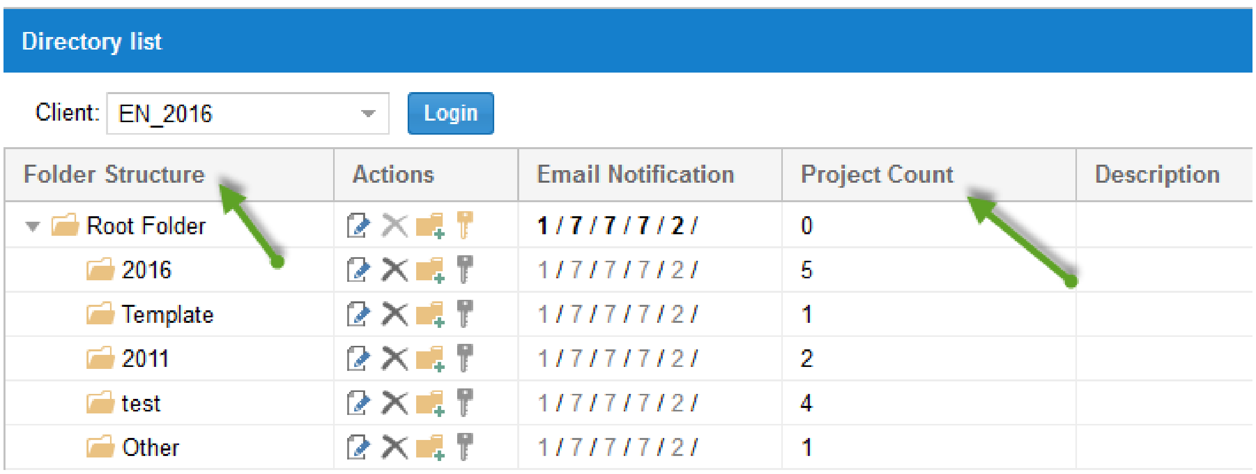
User roles

User roles do not depend on folder and assign access rights for:

- the resource pool,
- the user management,
- vacation planning
- working with DMS
- Modules iCalendar and Timeline,
- working with the portfolio.

Folder roles

The projects can be grouped in the Rillsoft Integration Server in a multi-stage structure together. This structure is available in the menu item **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 /	1	

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

In addition, working with portfolios, some e-mail notification functions, feedback and iCalender are influenced by the directory roles, as these relate to projects that are stored in various directories.

Conclusion:

Directory roles are directory-dependent and are responsible for the access rights to the following activities:

- Working with directories
- Working with projects
- E-mail notification
- Timesheet
- iCalender access

For example, the user Doe has mechanical engineering for clients:

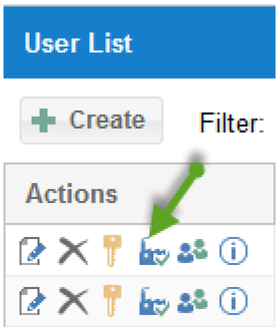
- User roles as project manager, iCalendar user and timeline user
- Folder role as the root folder user

1.4.5 Define client's access for a user

First select **Administration > Users**.

In this tab you can define what clients a user is allowed to work with.

First, click on the button 

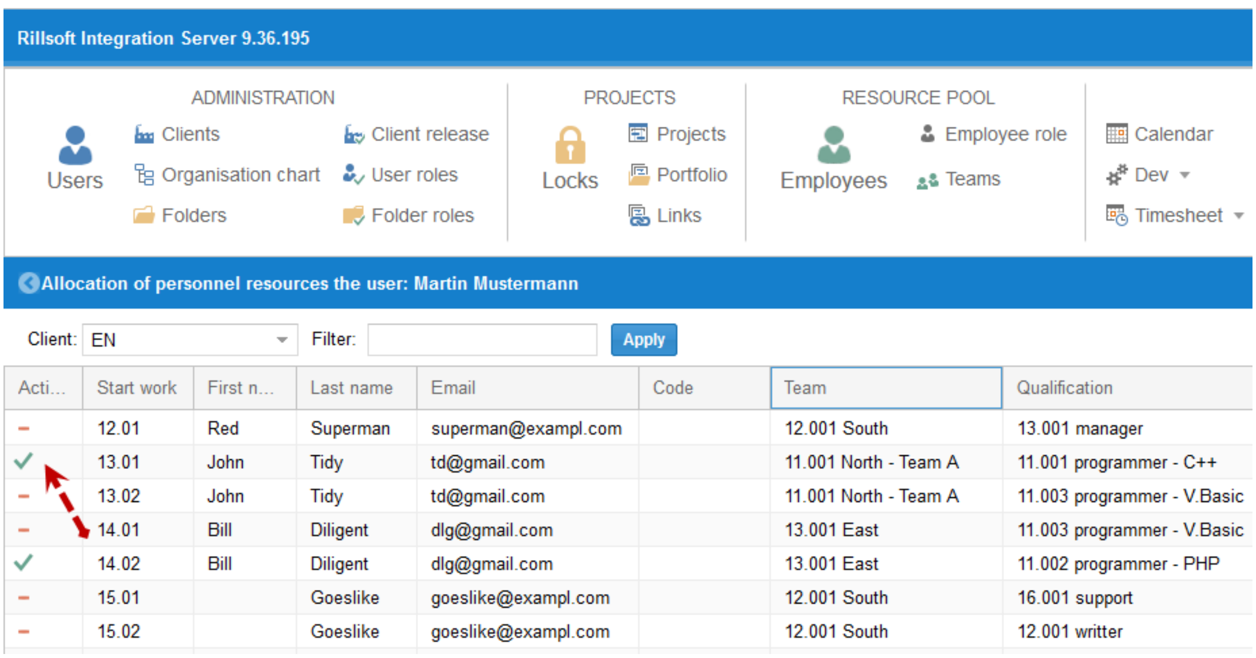


in the column **Action**.

Now you can click on or  in the corresponding cell.

Alternatively you can

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



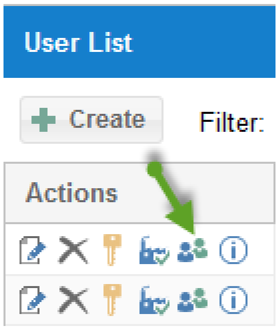
1.4.6 Subordinate personnel resources to a user

Not all personnel resources are entered as users in Rillsoft Integration Server.

Nevertheless relevant scheduling information as worked hours or vacation requests for these individuals can be entered in System by other users.

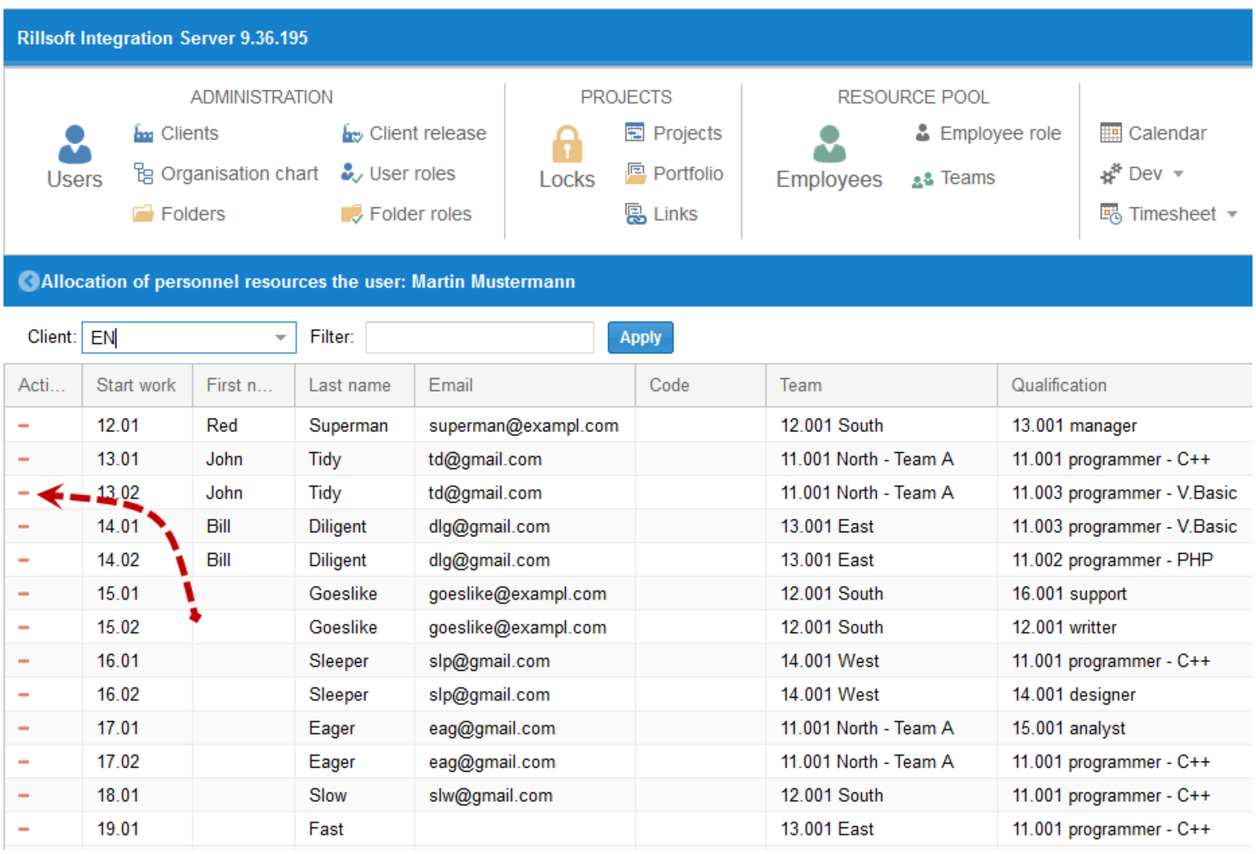
For such situations you should subordinate the personnel resources to a user.

First, click on the button 



in the column **Actions**.

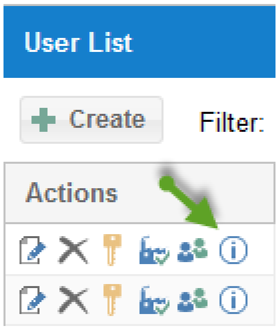
Now click on symbol | image0 | in the column **Actions**.



1.4.7 User info

Here you will find all the information for a user about his access rights and subordinate employees together in three tabs.

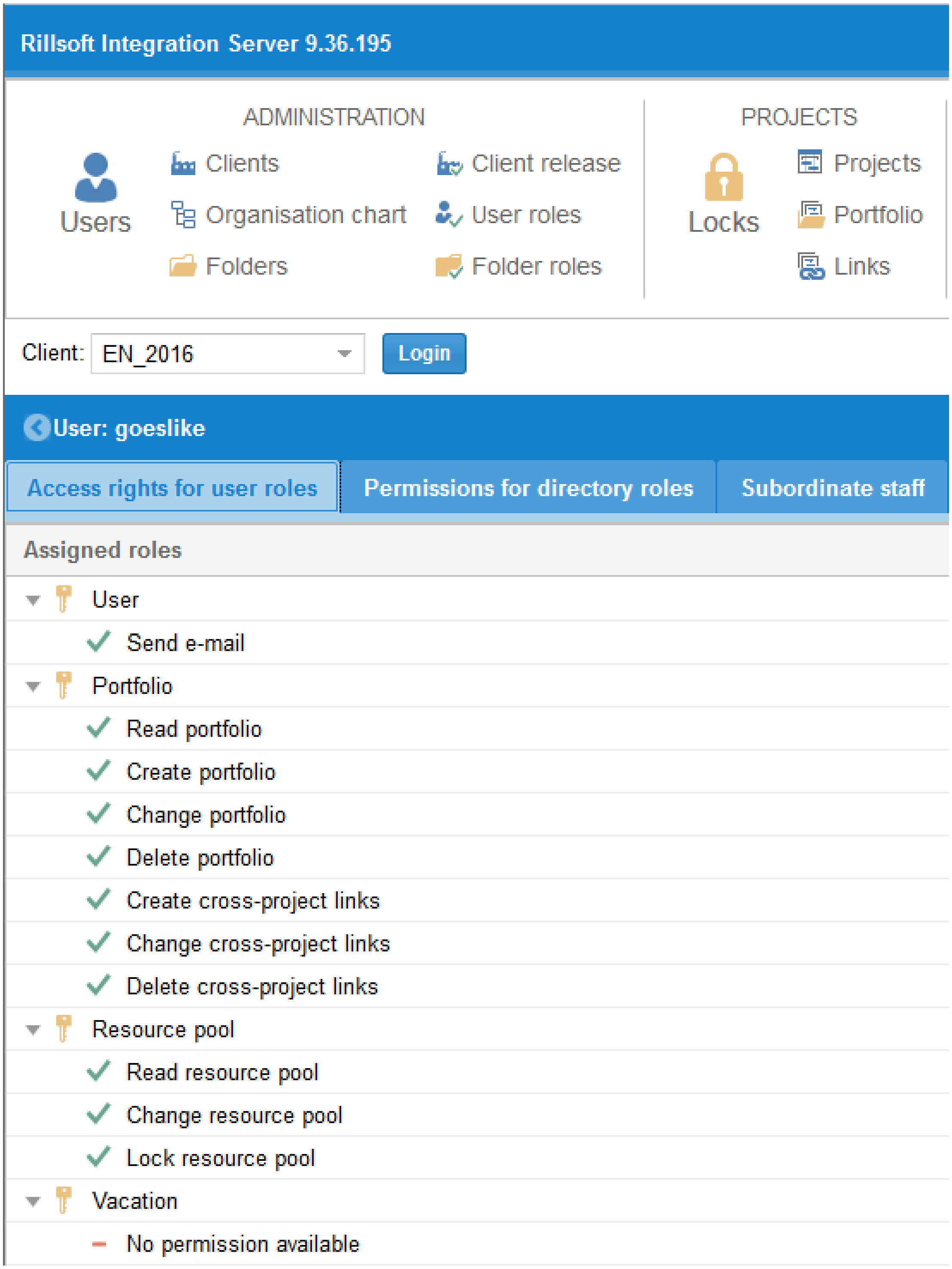
Click on the button 



in the column **Actions**.

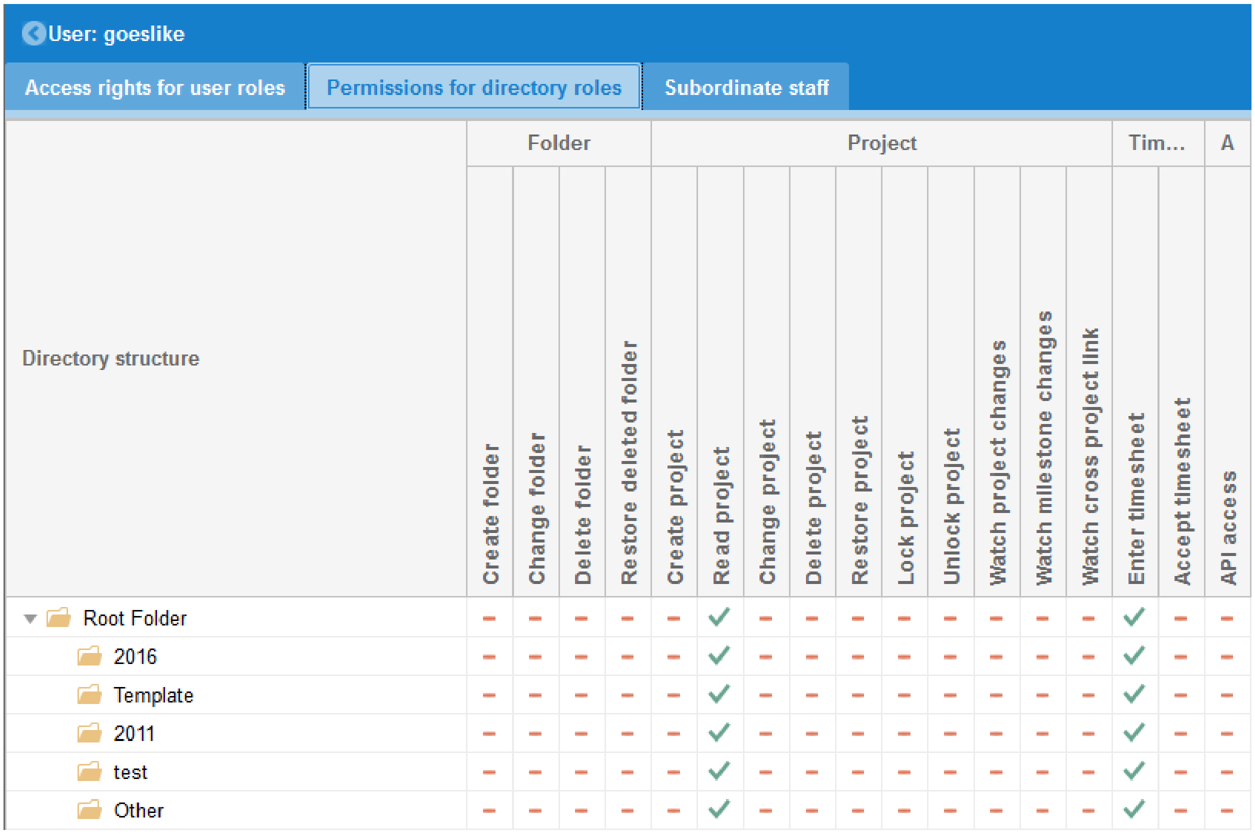
Access rights for user roles

Here information is summarized, whether the user is allowed to work with portfolios, resource pool and additional modules.



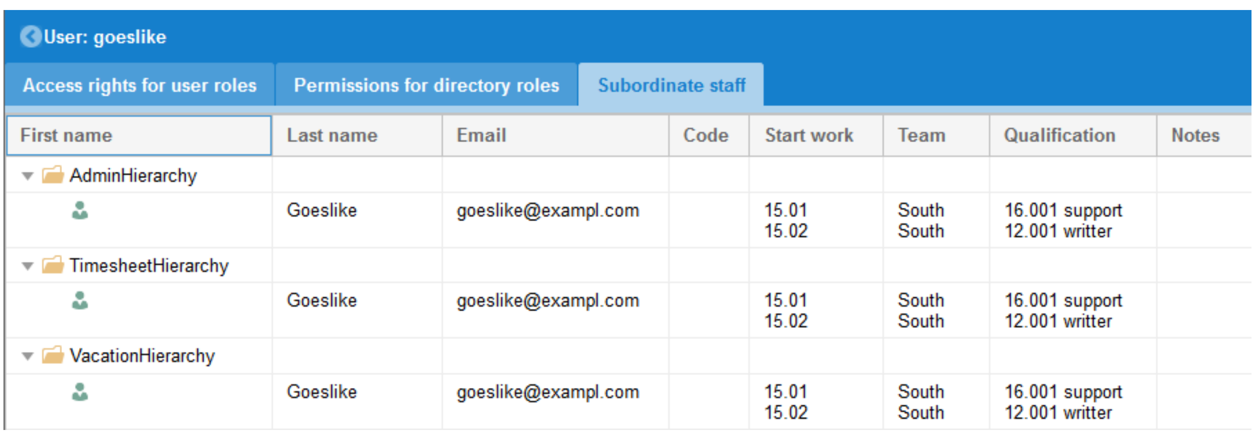
Access rights for folder roles

You can see in the tab listwhat directories and projects the user is allowed to work with and what activities he can carry out.



Subordinate employees

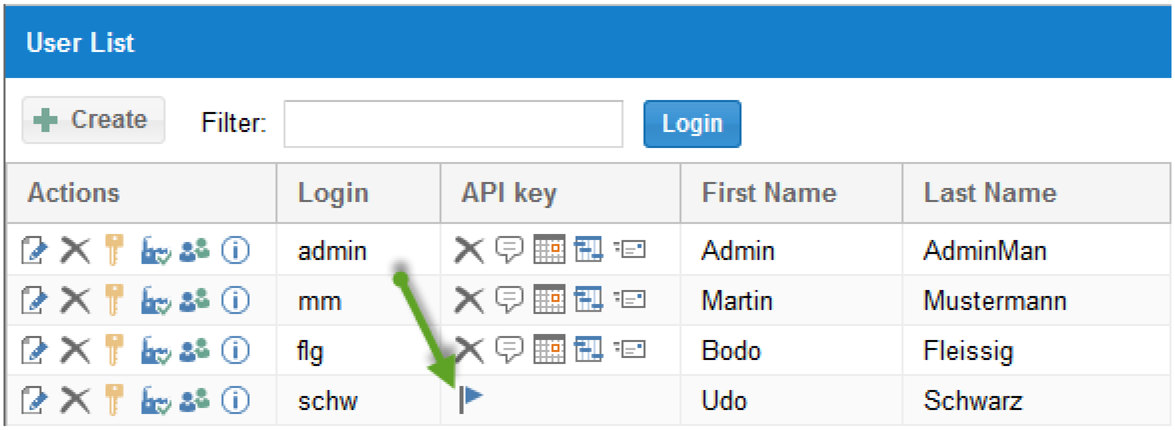
You can see in this tab, for which employees and in what fields the user should enter timesheet and vacation planning.



Create API access key

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

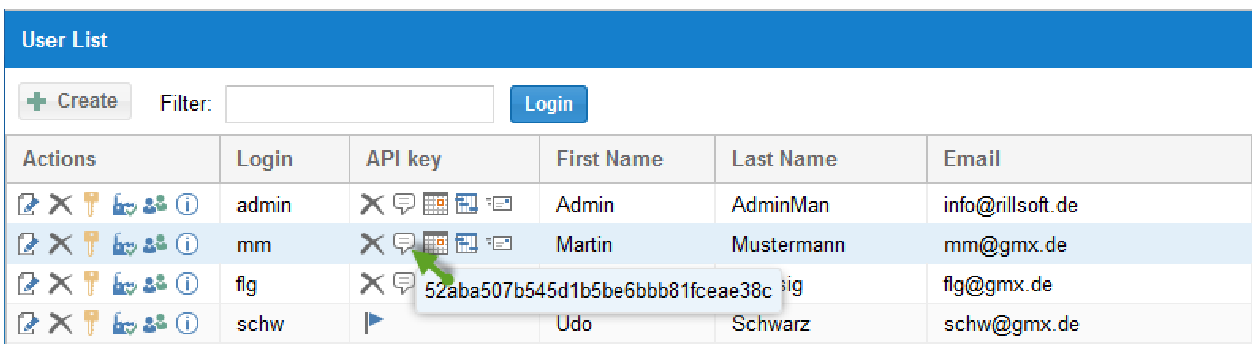
You can create a user's API access key by clicking on the in the column **API access key**.



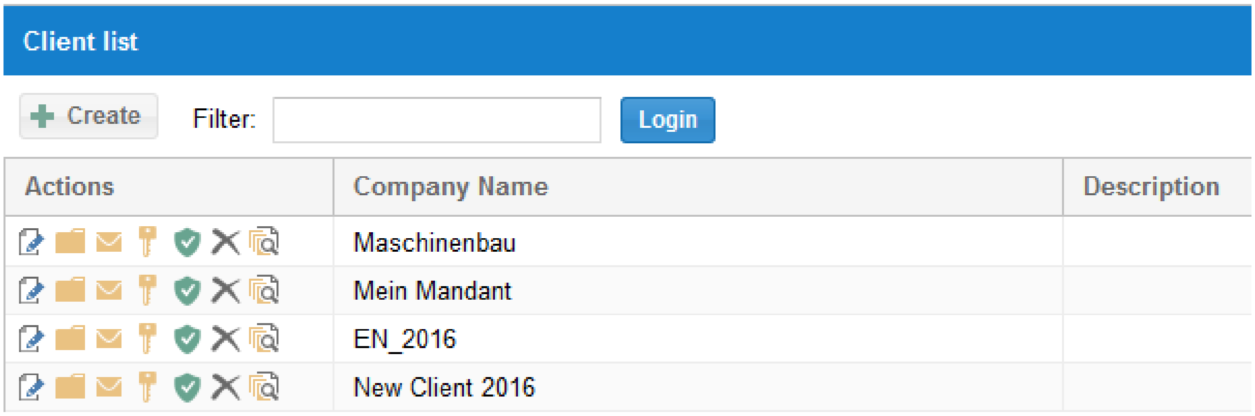
After that, icon buttons that allow you to various activities, such as

	Delete key
	Display key
	Generate URL for user iCalendar
	Generate URL for user-timeline
	Send API access key by e-mail

appears in the column **5**



1.5 Clients



First select **Administration > Clients**.

Basically, a resourcepool is created for an individual client. Accordingly, you should work per client only with one resource pool.

Functions

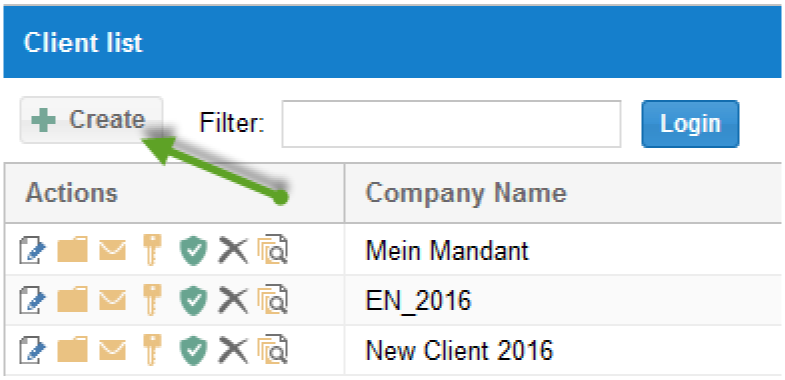
- correct the client description by clicking on the icon button Pen. You can change the names and notes.
- edit portfolio analysis hierarchy of client by clicking on the icon button Folder .
- create and edit e-mail templates list for client by clicking on the icon button Mail .
- create a new client by clicking on the button **New Client**.
- get a user list of clients and their roles by clicking on the icon button .
- determine floating licenses of the client by clicking on the icon button .
- delete a client by clicking on the icon button .
- show all existing resource pool versions of a client by clicking on the icon button and return to a previous version of resource pool.

See also

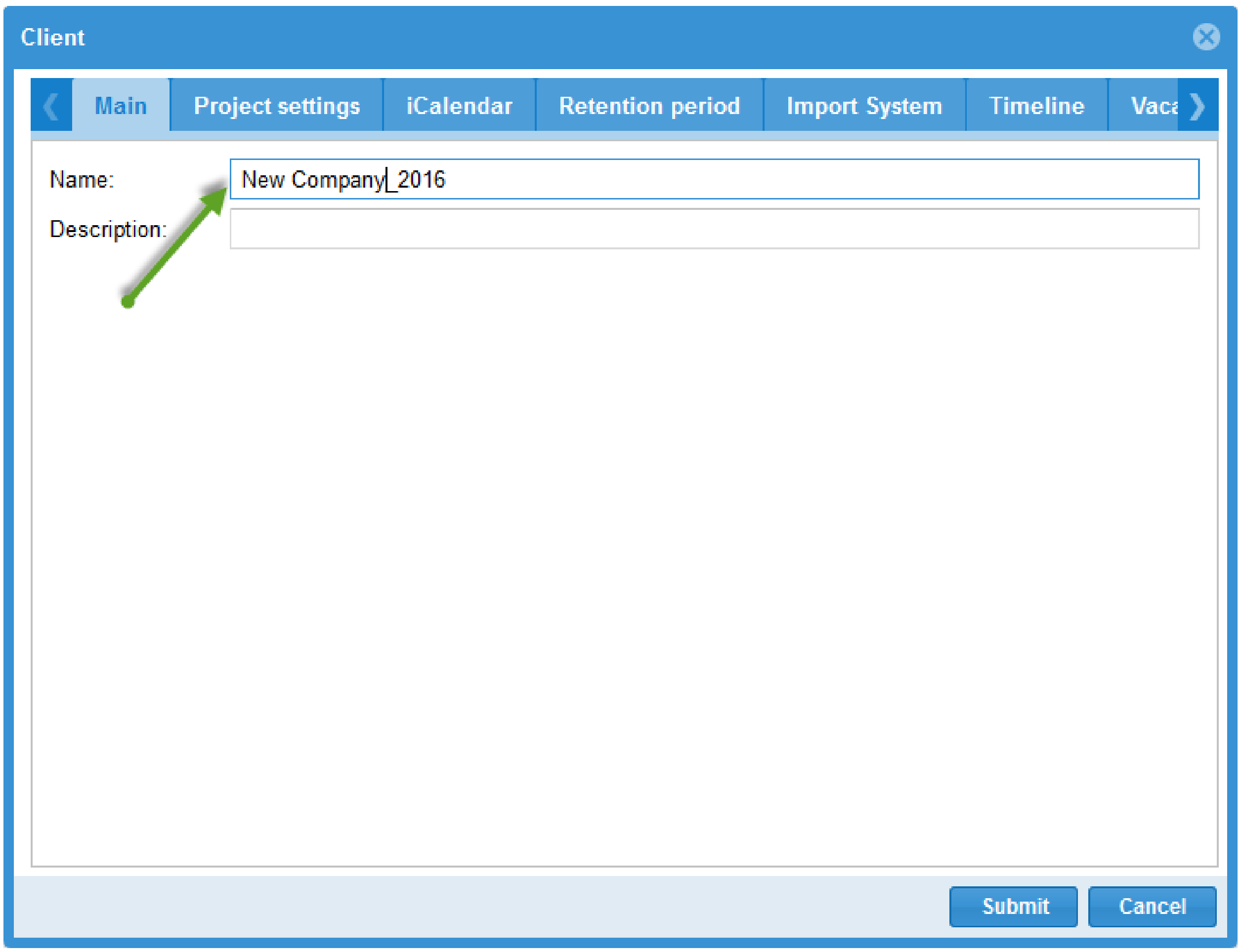
1.5.1 New client

First select **Administration > Clients**.

In order to create a new client, click on the button



enter in the tab **General** a name and notes.

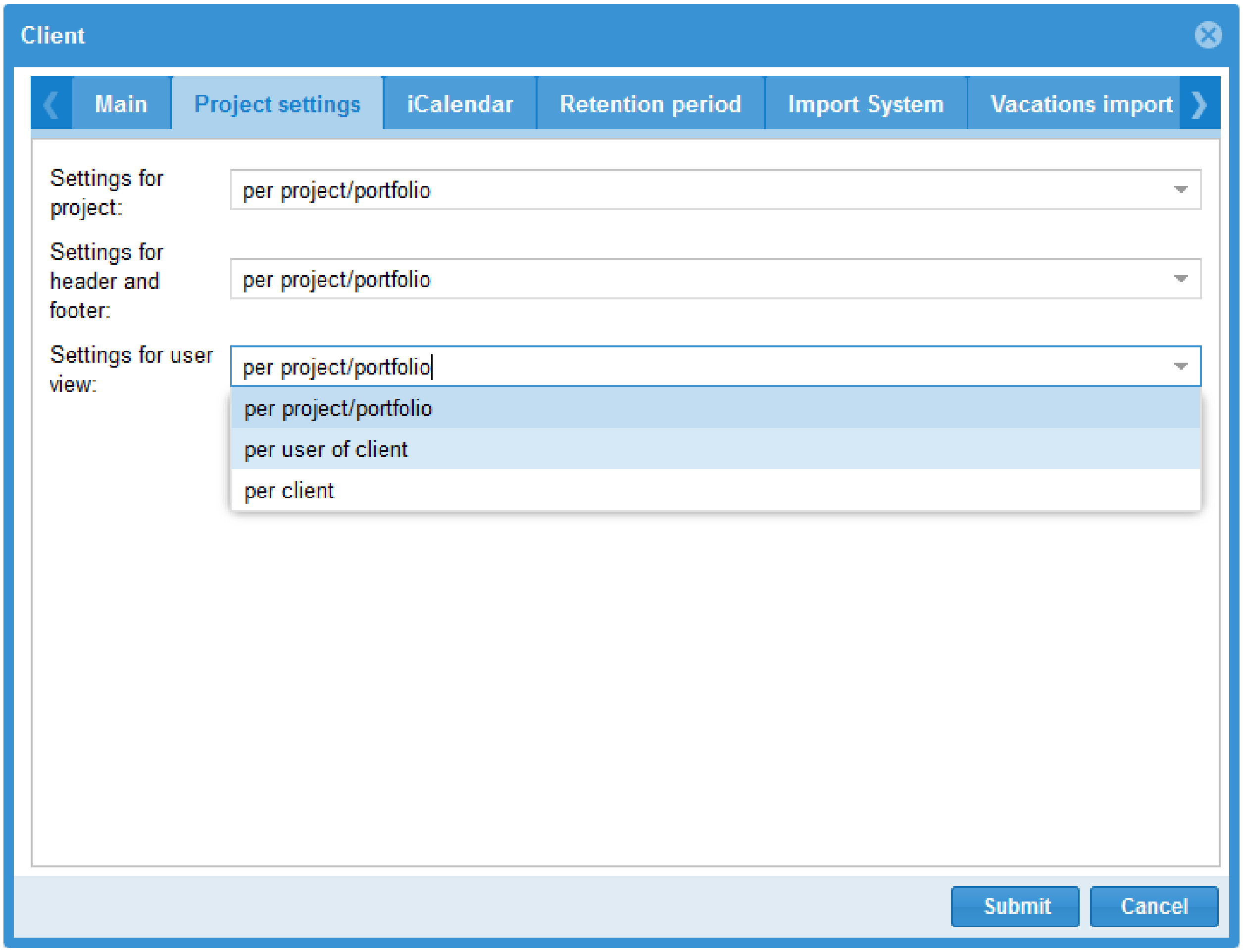


Thereafter click on the button **Save** to save information.

You can set here other parameters.

Project properties

Here you can specify the rule settings presentation, header and footer and user views.



You define whether project settings such as

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

should be used as default settings for other projects or not.

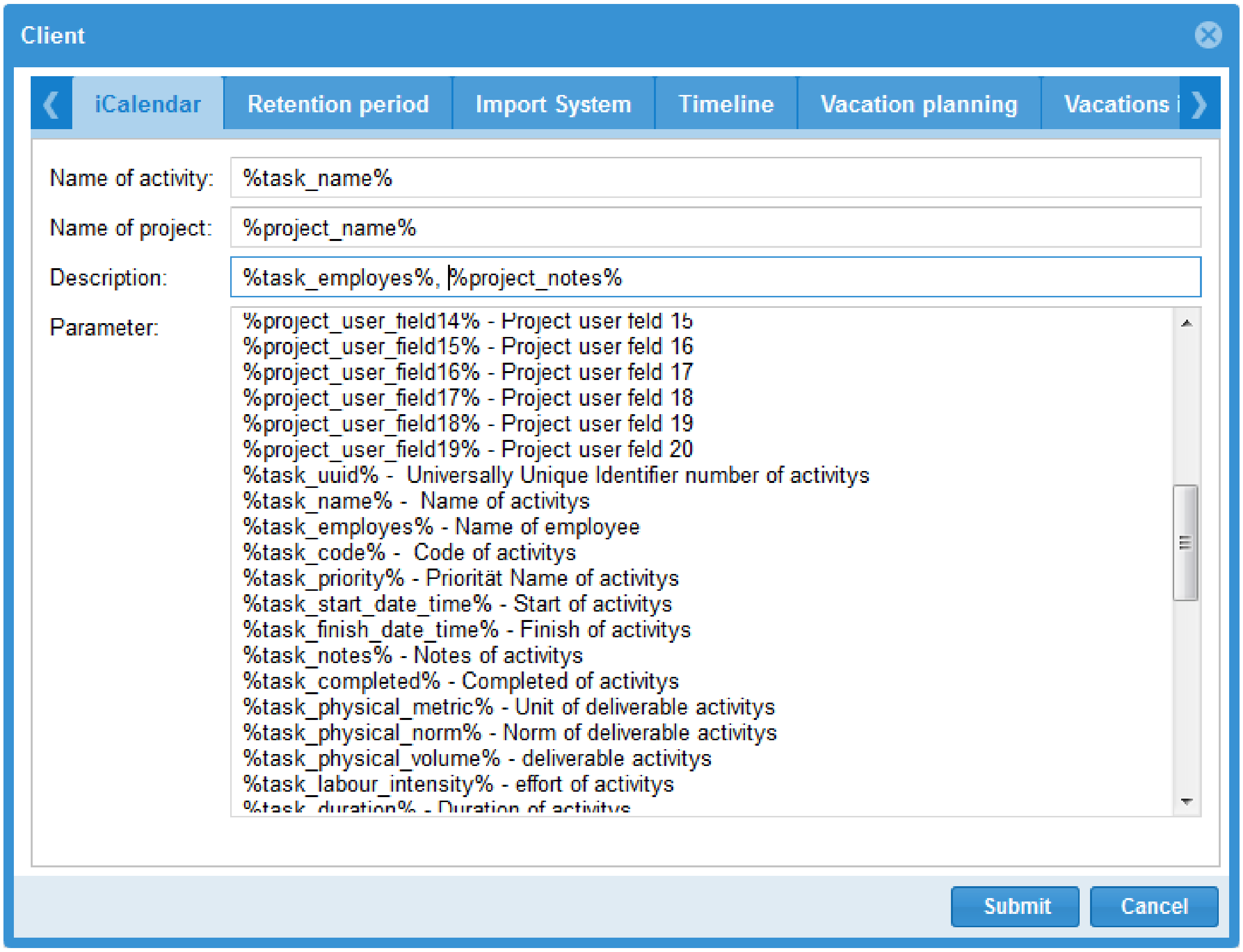
Set also headers and footers presentation and user views in the same way.

The following options are available:

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

iCalendar

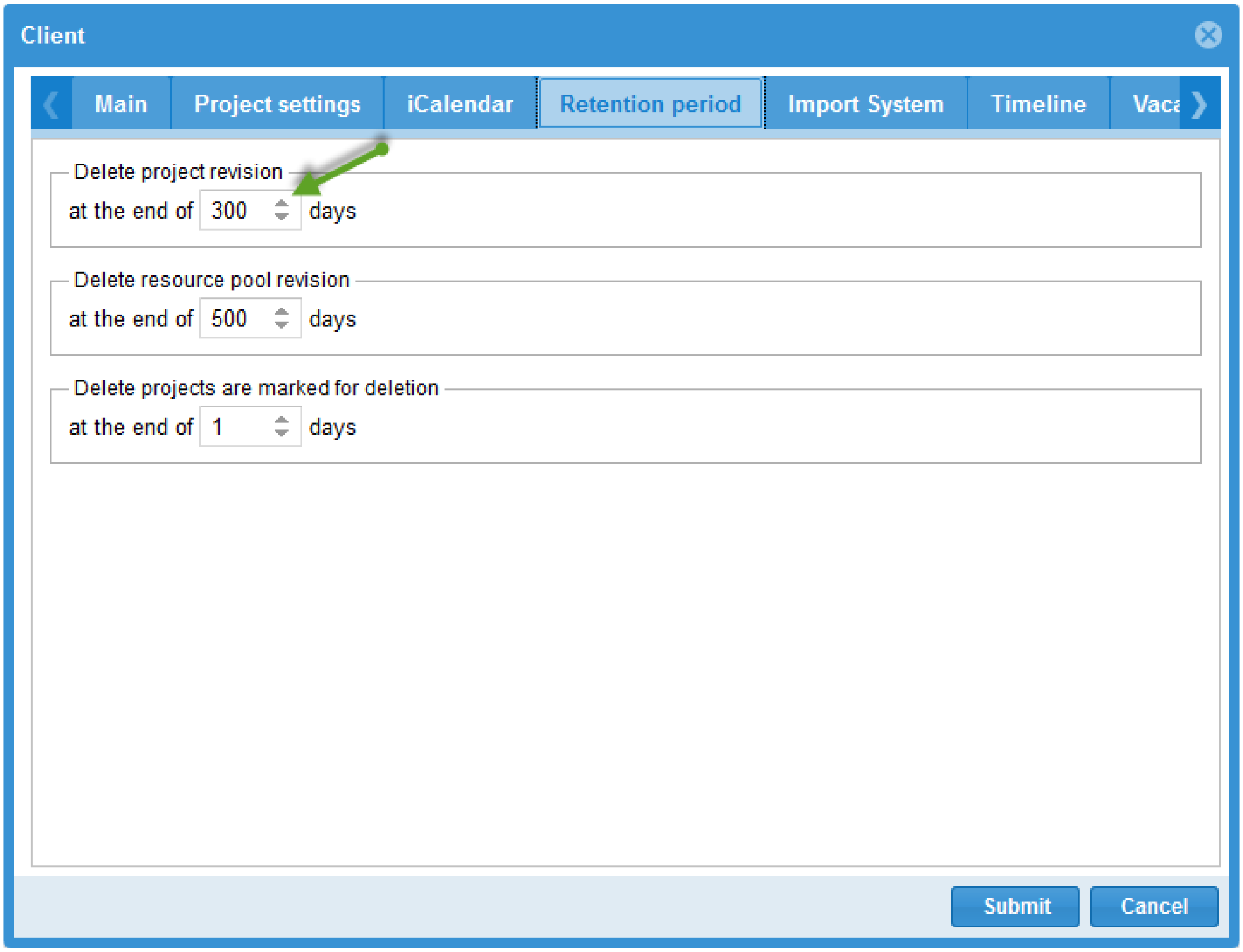
Here you can specify what information should be given to Outlook.



After double-clicking on a date in the Outlook calendar the following information is displayed.

Retention periods

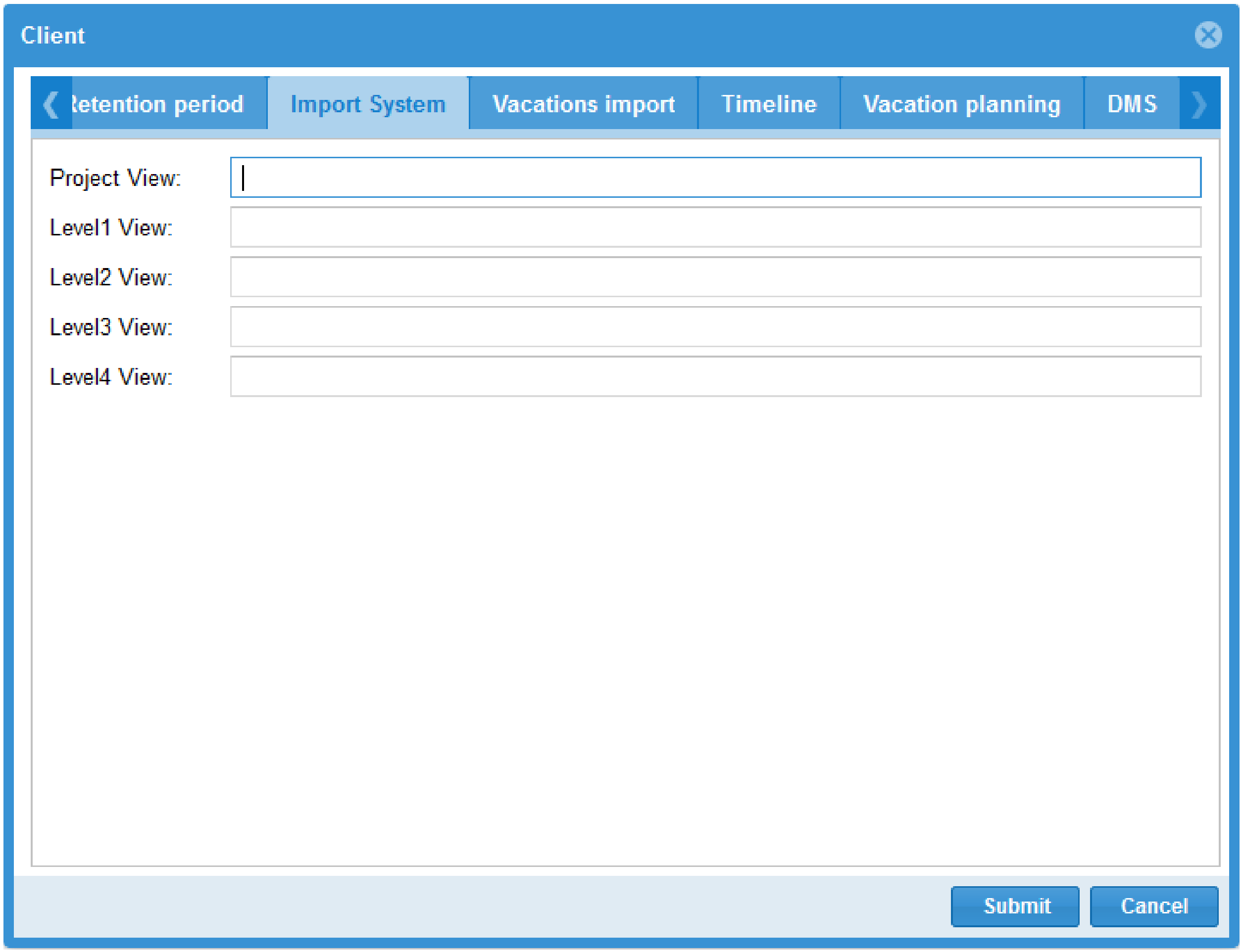
Here you can specify when marked for deletion projects, project revisions and resource pool revisions should be permanently deleted.



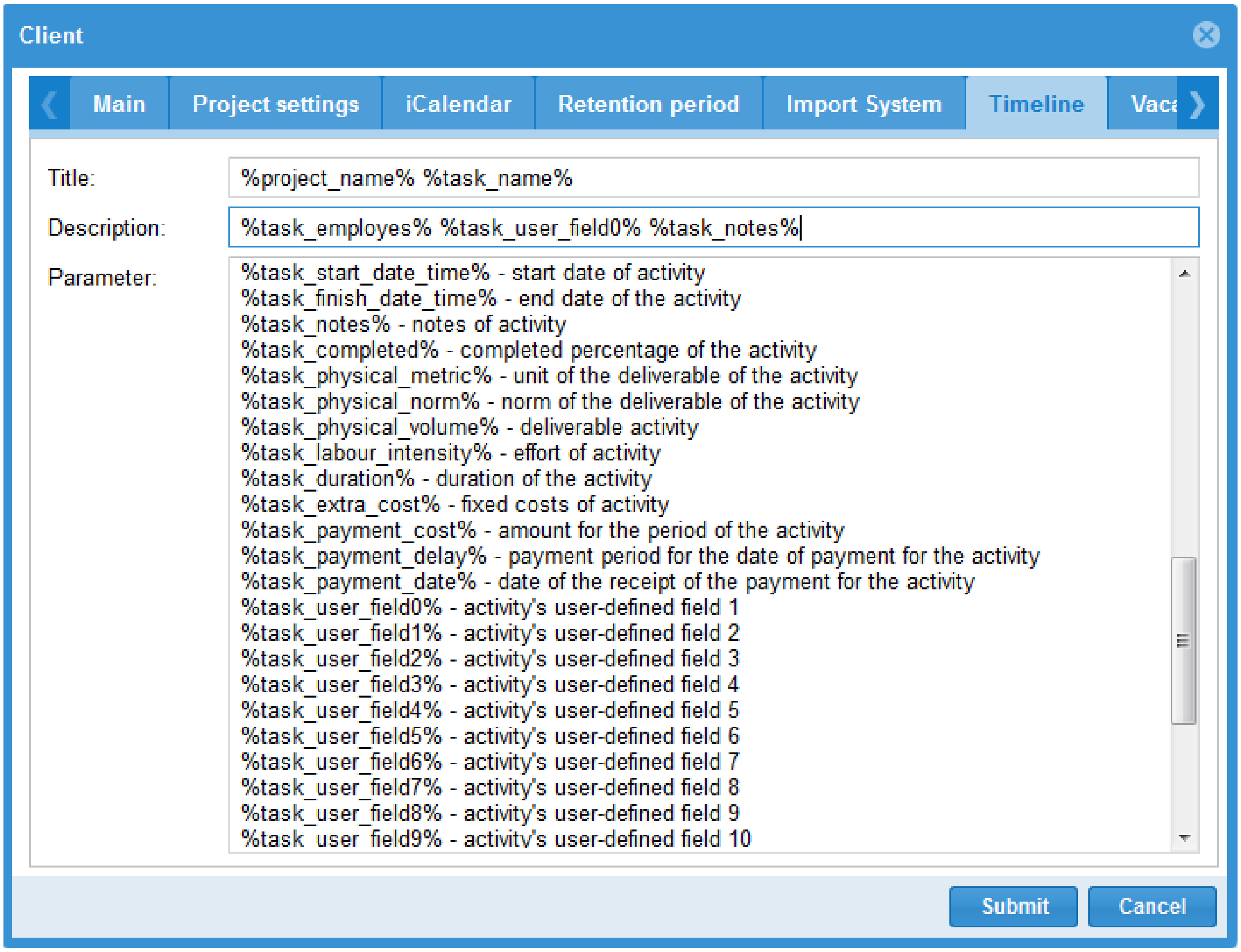
Note

- A folder is deleted only then when all projects located in the folder are 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

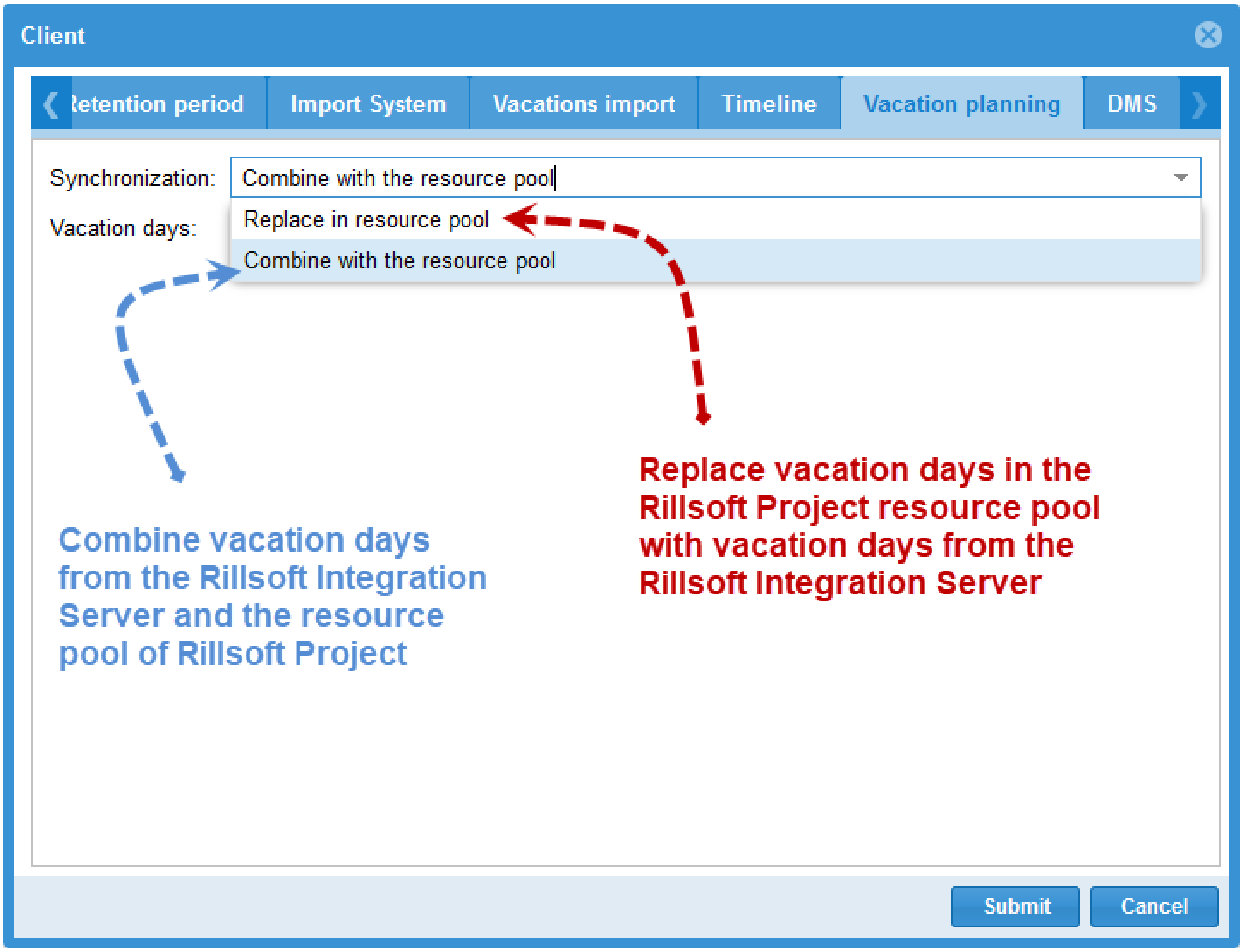


Vacation Planning

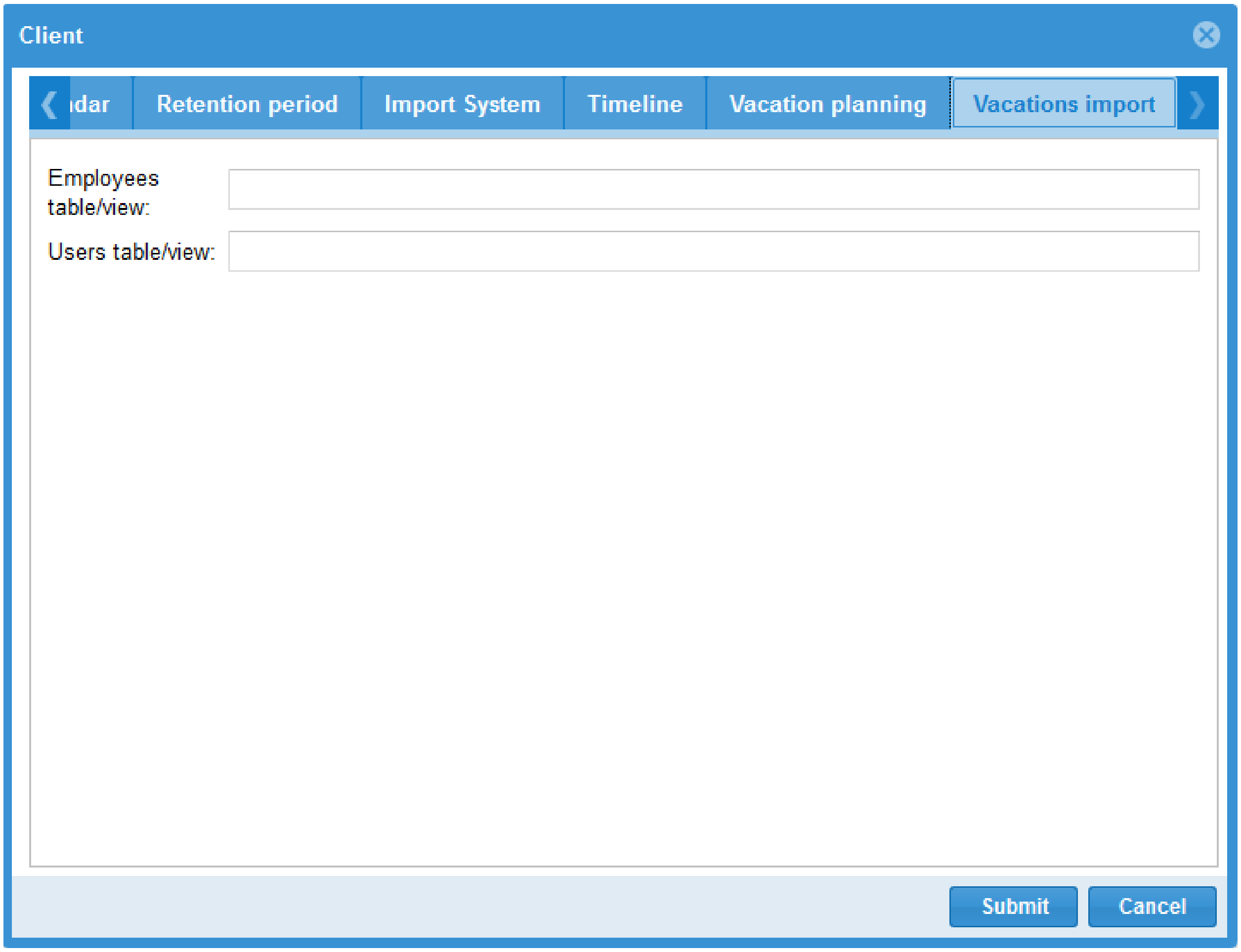
On the tab, you define the way in which the non-working days are to be synchronized between the Rillsoft Integration Server (Rillsoft Cloud) and, if applicable, Rillsoft Project.

If a project planner has already defined the non-working days for employees in the Rillsoft Project client part, you can select one of the 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 include the non-working days from the Rillsoft Integration Server (Rillsoft Cloud)



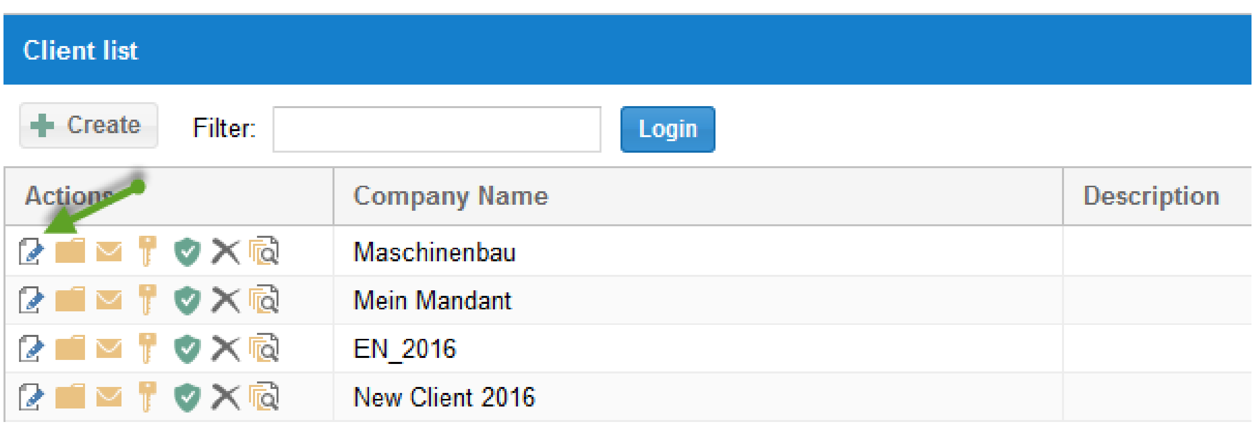
Vacation Import



1.5.2 Edit a client

First select **Administration > Clients**.

After clicking on the button



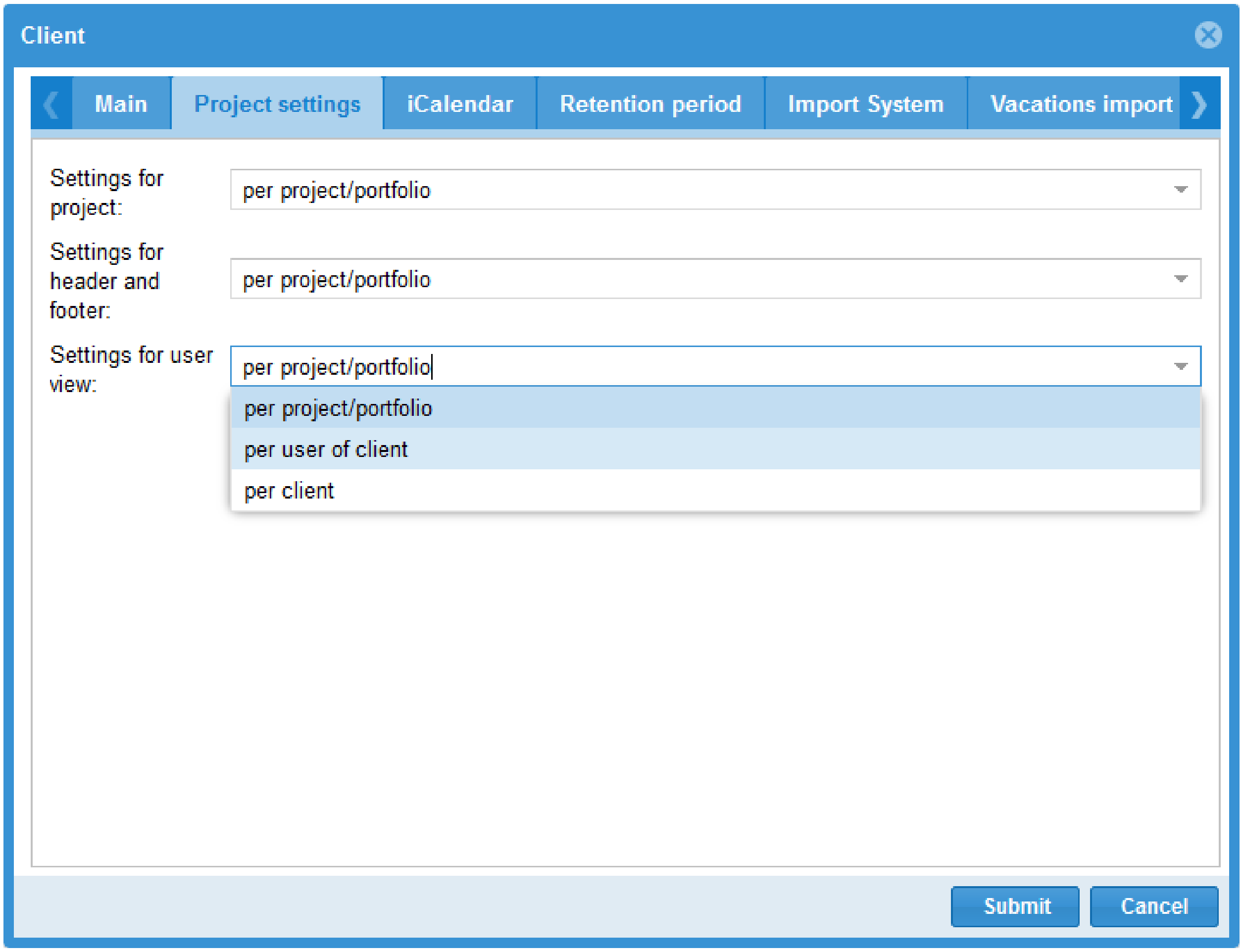
you can edit the client description.

Thereafter click on the button **Save** to save the information.

You can set here other parameters.

Project properties

Here you can specify the rule settings presentation, header and footer and user views.



You define whether project settings such as

- for example, units of time for duration and effort etc.
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- time scale representation

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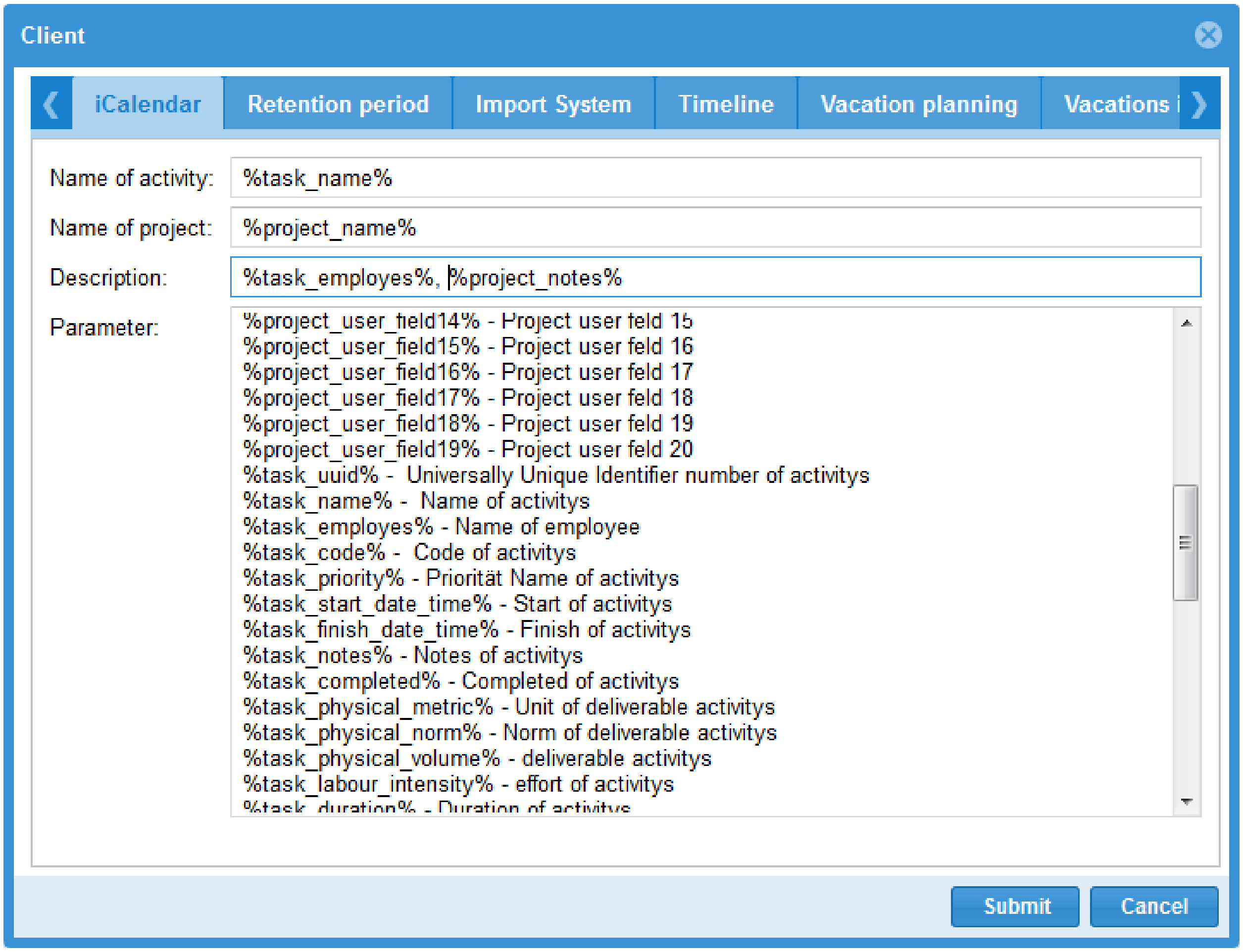
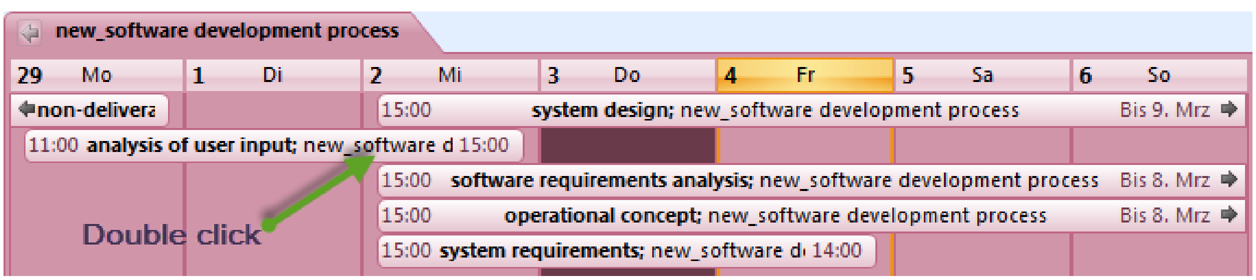
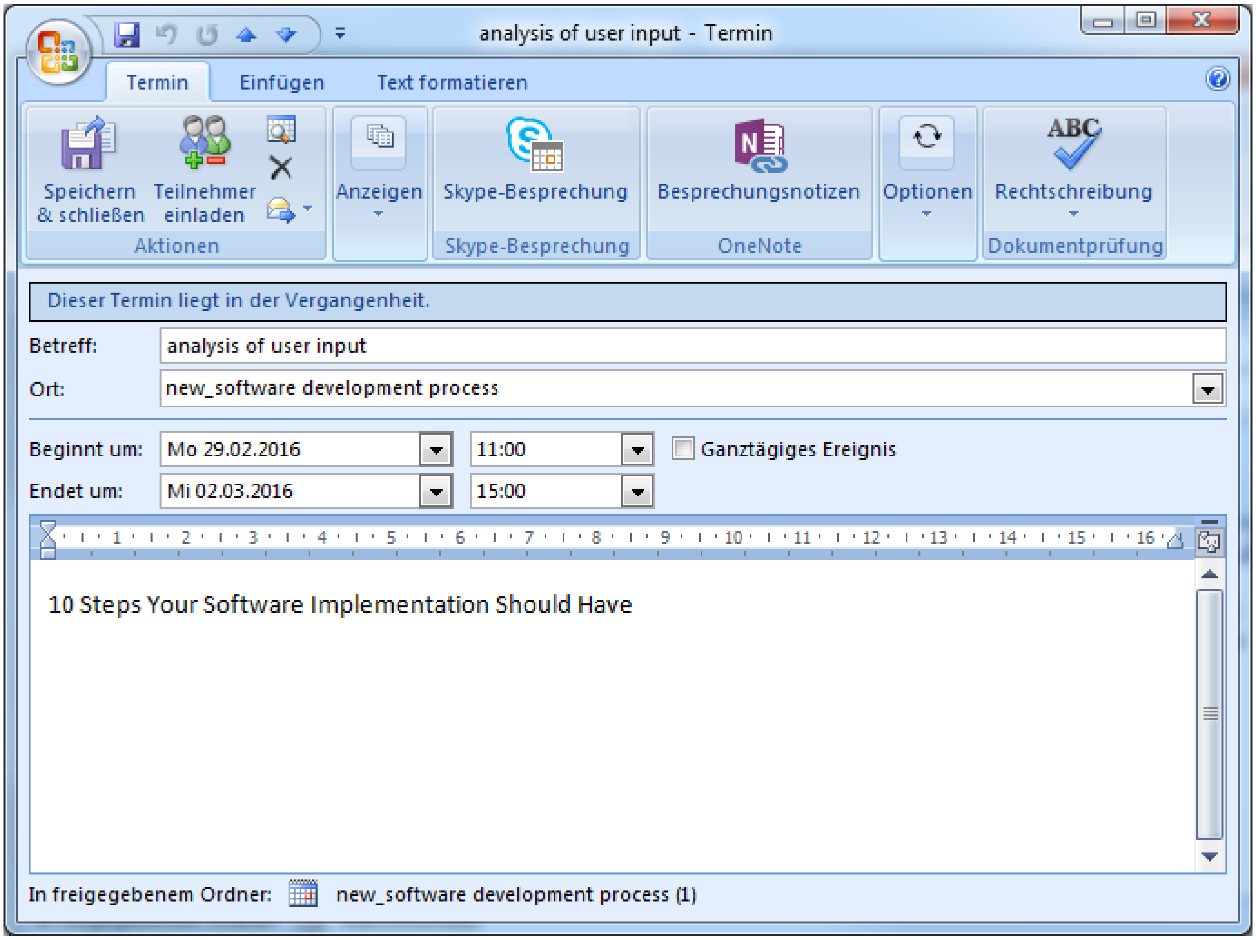


After double-clicking on a date in the Outlook calendar

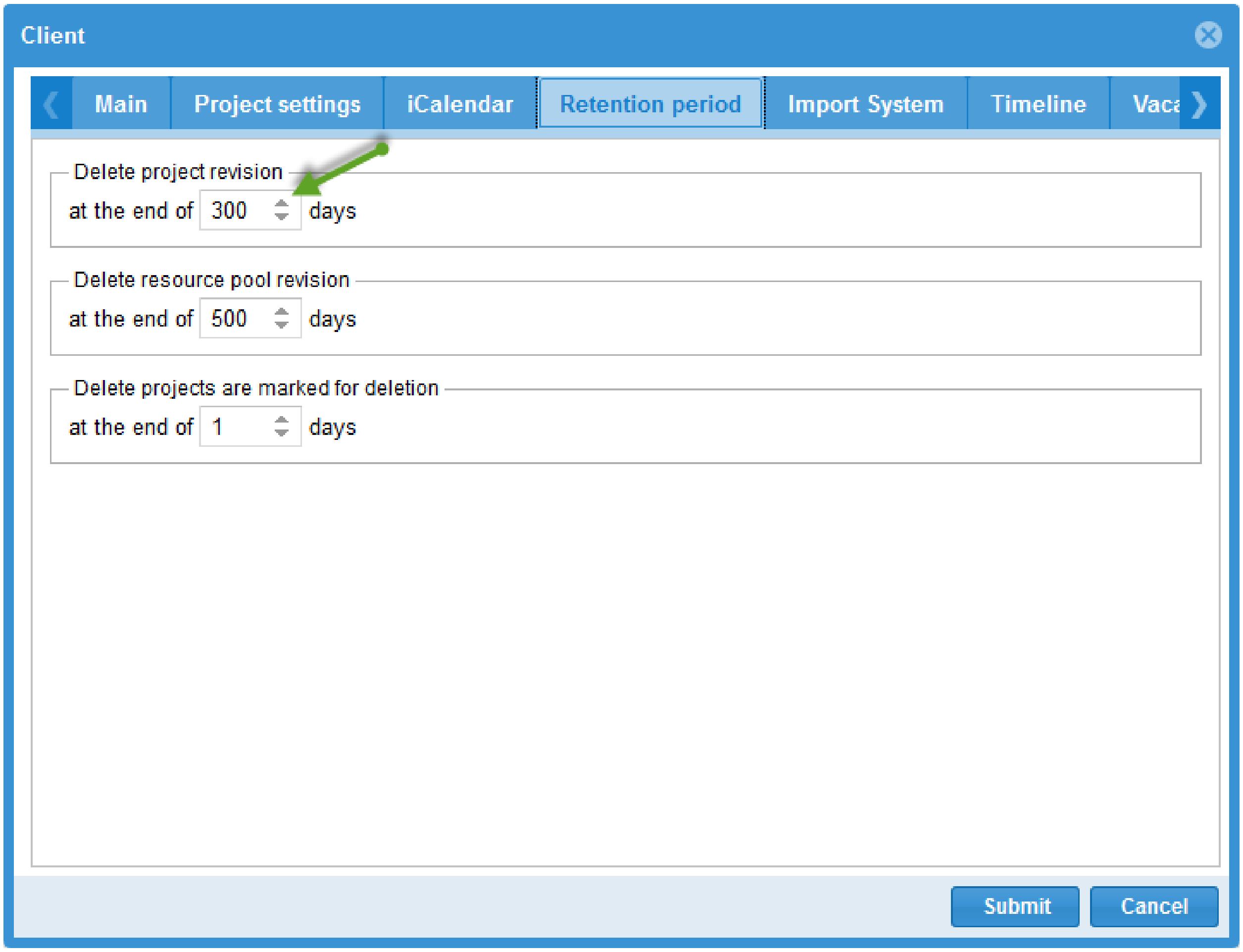


the following information is displayed.



Retention periods

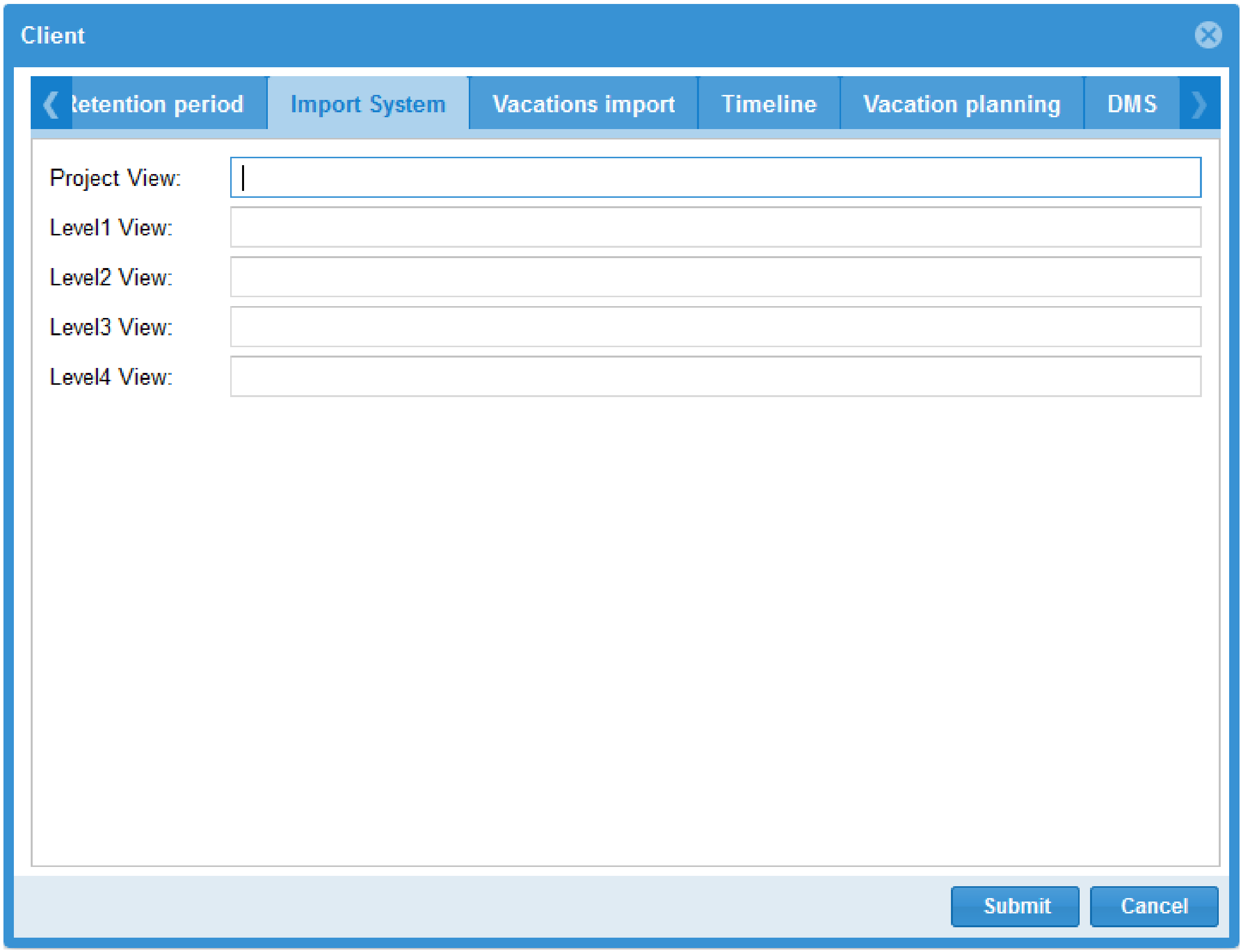
Here you can specify when marked for deletion projects, project revisions and resource pool revisions should be permanently deleted.



Note

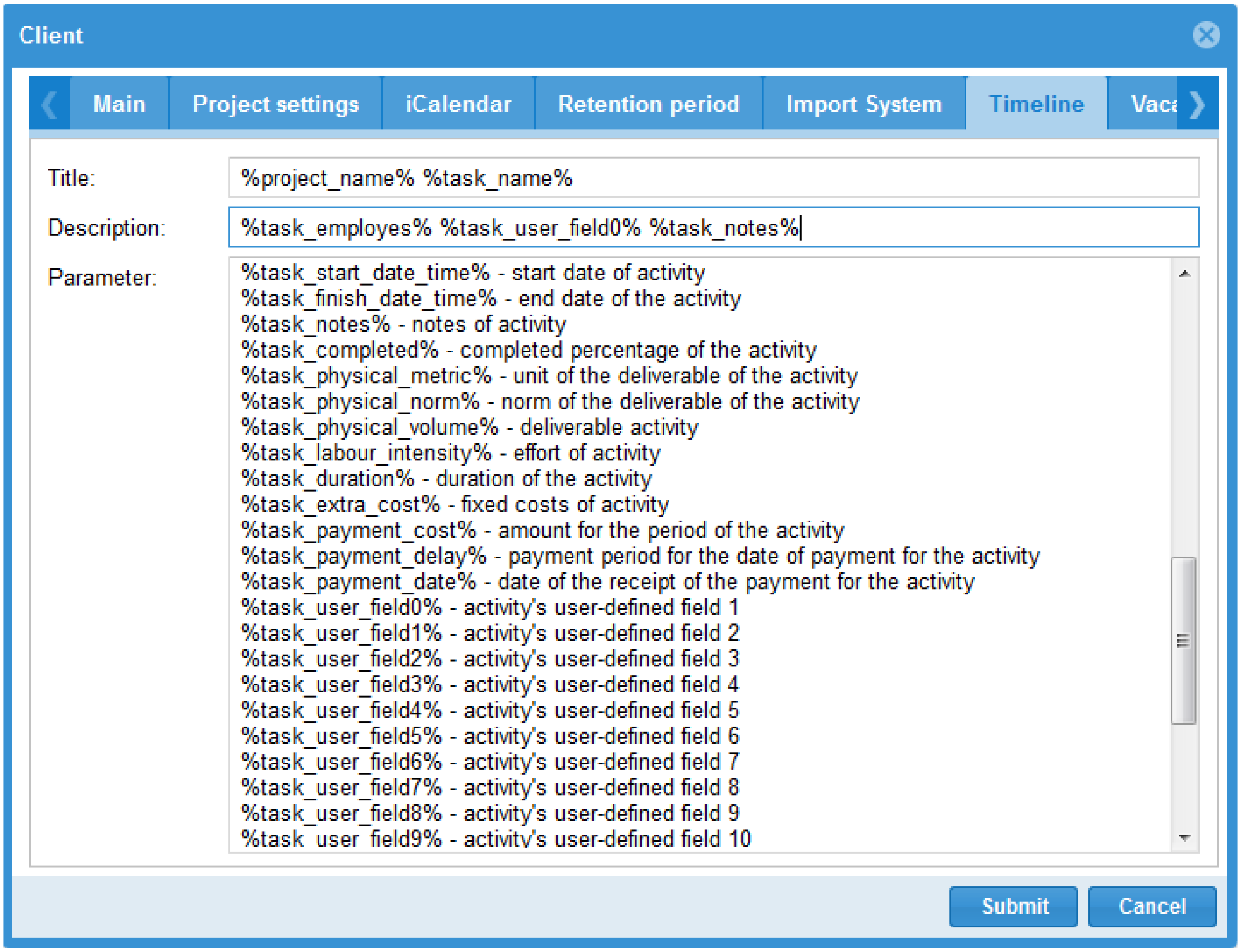
- A directory is deleted only then when all projects located in the folder are permanently deleted after the retention period
- Permanently deleted projects / folders cannot be restored
- Returning to a deleted revision (Project / resource pool) is not possible.

Project Import



Timeline

In the timeline tab you can define what project information should be given in timeline.

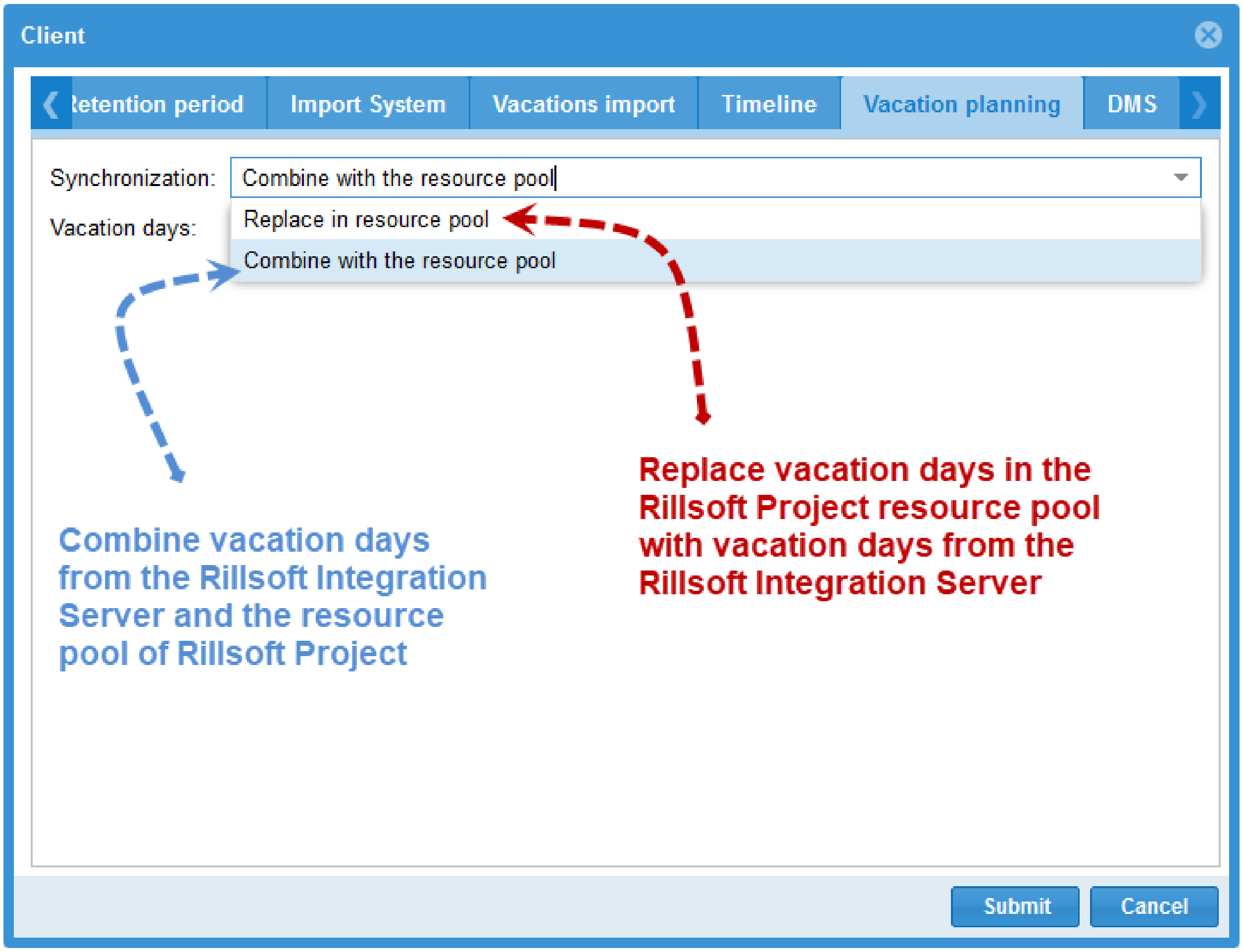


Vacation planning

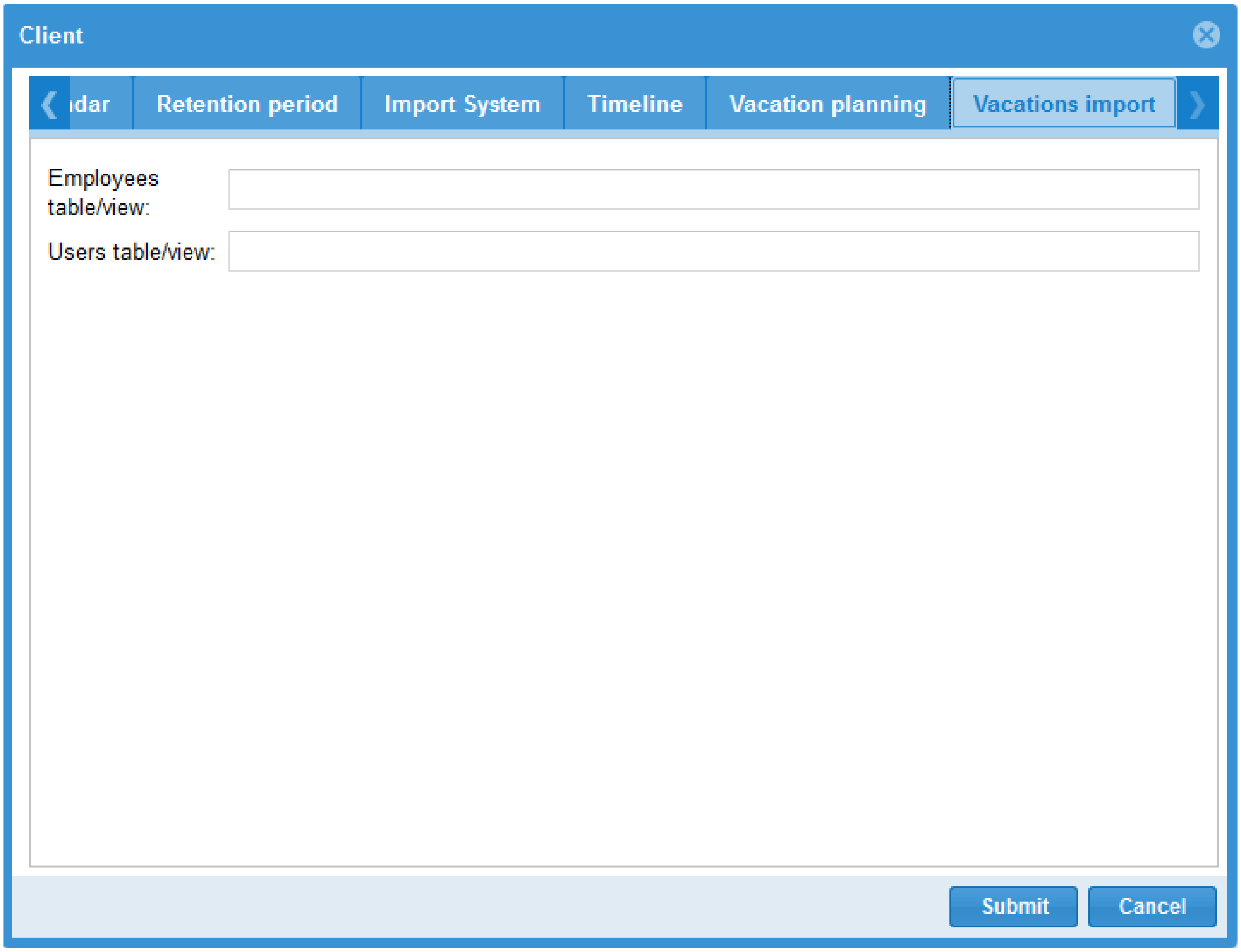
Here you can define how the non-working days are to be synchronized between the Rillsoft Integration Server (Rillsoft Cloud) and, if applicable, Rillsoft Project. If a project planner has already defined the non-working days for employees in the Rillsoft Project client part, you can select one of the 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 include the non-working days from the Rillsoft Integration Server (Rillsoft Cloud)

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



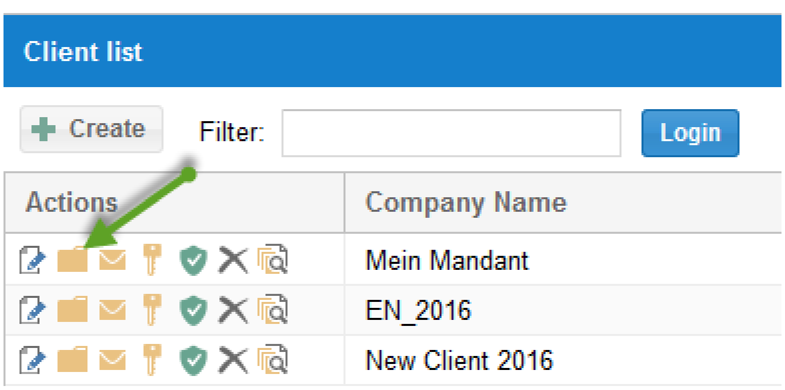
Vacation Import



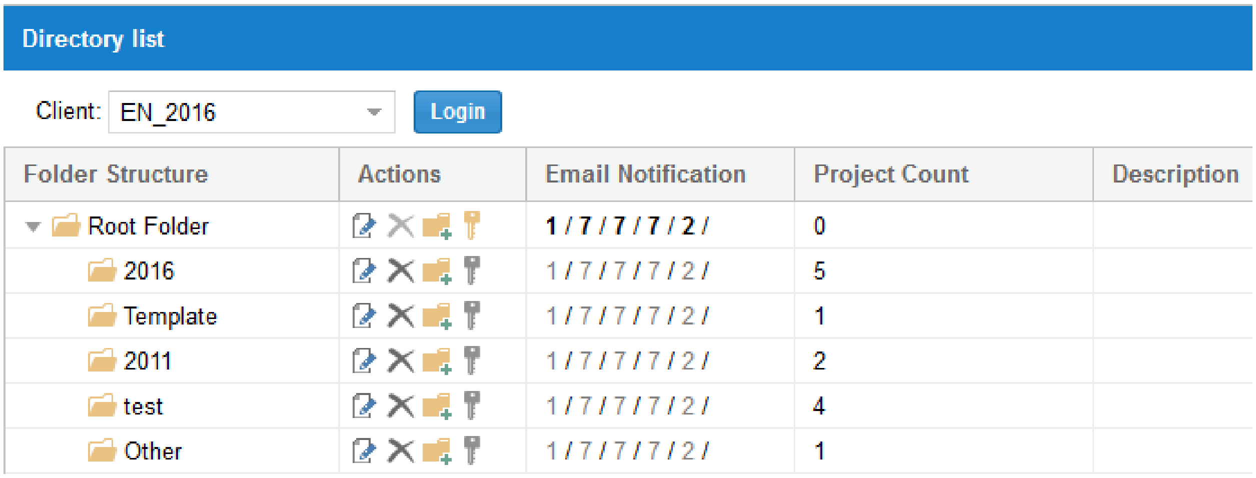
1.5.3 Portfolio structure hierarchy of clients

First select **Administration > Clients**.

After clicking on the button **Folder**



you can create the portfolio structure of the client.



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	

You can drag a folder by **Drag & Drop** to preferred position.

In addition, the following functions are available:

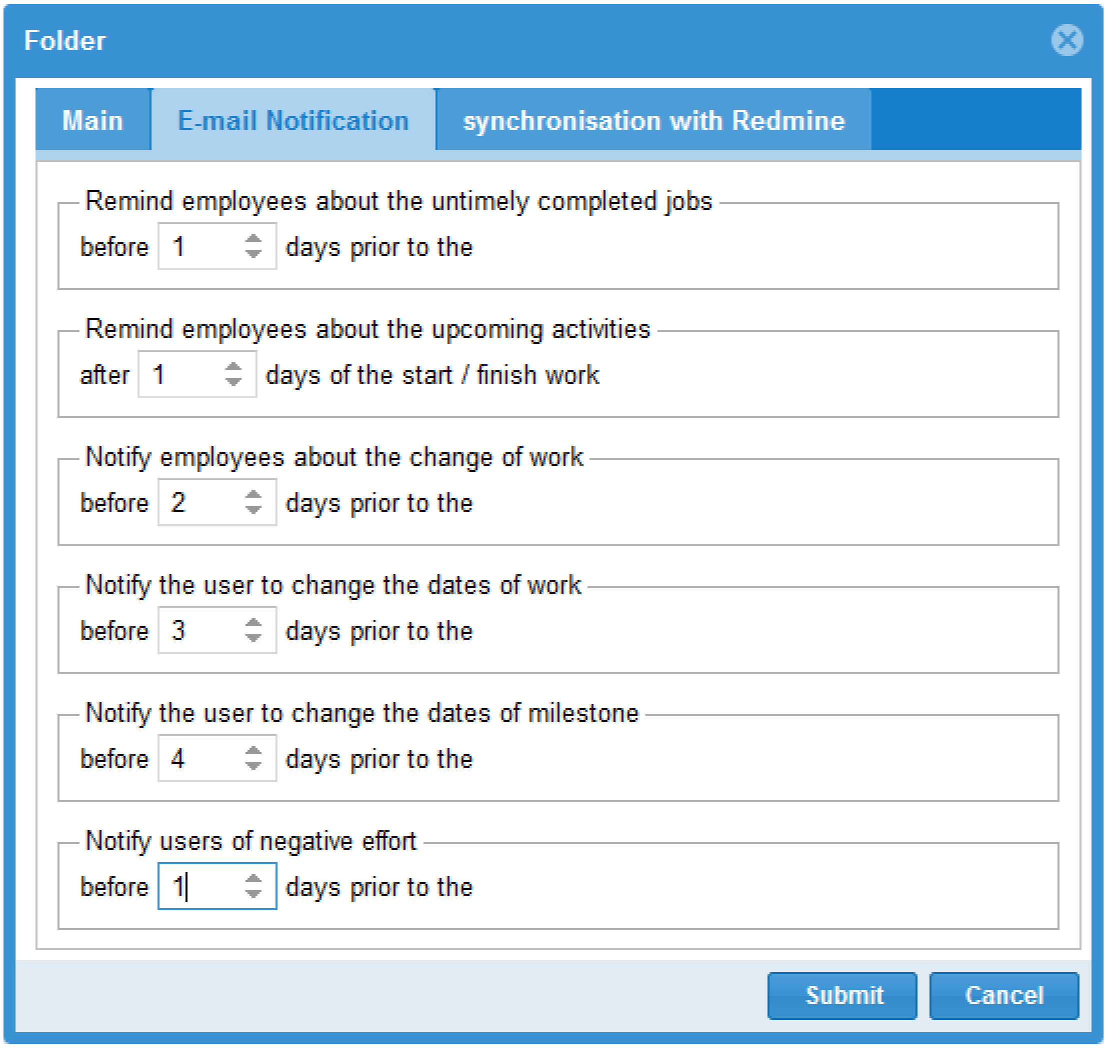
	** Change the name and description of the folder** **Define time limits for e-mail notification**
	Delete folder
	Create a new subfolder
	Change access rights for the folder

Tip! A yellow key indicates that some of the existing folder roles are assigned to the folder (column Folder structure).

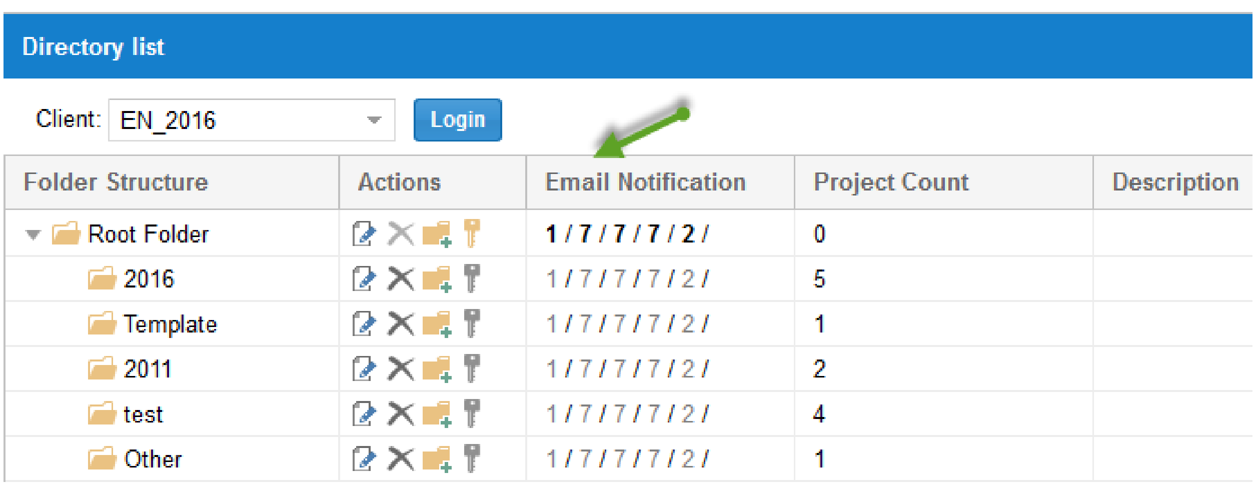
A gray key indicates that the access rights for the folder were taken from the root folder

Time limits for e-mail notification

After clicking on the button **Note with a pen** you can set a period of time for activities.



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



Remind employees about **The untimely completed jobs**, that must have been completed X days ago.

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

- the activity start lies within the time gap between the current date minus X (e.g. 2) days and the percentage completion for this activity is equal to 0.

- the activity end lies within the time gap between the current date minus X (e.g. 2) days and the percentage completion for this activity is less than 100.

Remind employees about **The upcoming activities**, that must be completed X days in advance. If the option is on, the employees, who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 3) days, will be warned by e-mail. For instance, today is the 15th of July and 3 days are entered, then the period is from 15.07 to 18.07.

Notify employees about **The change of work**, that must be completed X days in advance. If the option is on, the employees, who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 1) days,will be warned by e-mail and the time limits will be shifted.

Notify users about **The change of work**, that must be completed X days in advance. If the option is on, the employees,who have subordinate employees and who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 7) days, will be warned by e-mail and the time limits will be shifted. You can define subordinate employees by clicking on the menu item **Administration/User**, column **Actions**, button . The field **Filter** should be empty.

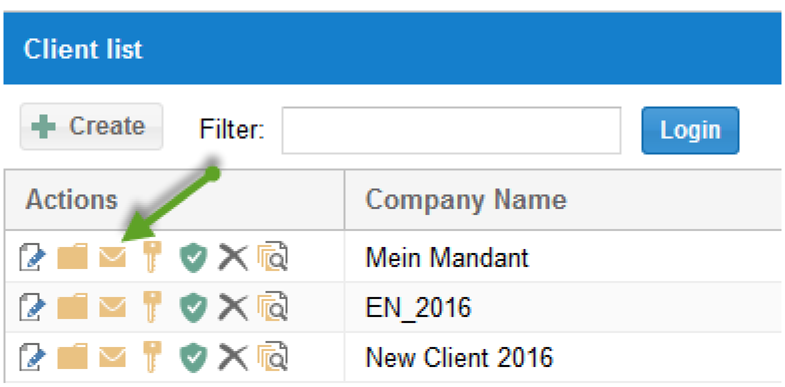
Notify users about **The change of milestone dates**, that must be completed X days in advance If the option is on, the users will be notified by e-mail, in case of milestone dates shifts.

Caution!

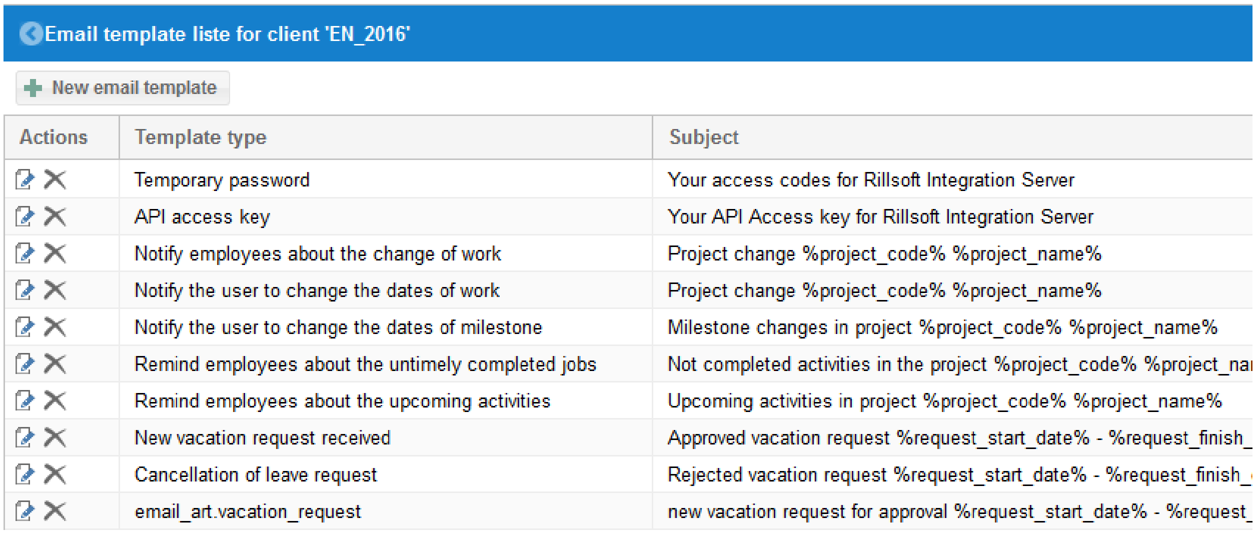
The first e-mail notification lists all activities from the project start up e.g. 17.07. Then new activities will be added which means that if the information, e.g. a1, related to a certain activity has been already sent, the employees will not get e-mails about this activity that lies in the mentioned time gaps.

1.5.4 E-mail templates list

After clicking on the button **Mail**



you can create and edit an e-mail templates list for the client.



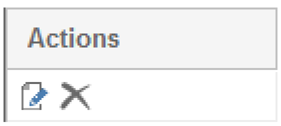
Email template liste for client 'EN_2016'

New email template

Actions	Template type	Subject
	Temporary password	Your access codes for Rillsoft Integration Server
	API access key	Your API Access key for Rillsoft Integration Server
	Notify employees about the change of work	Project change %project_code% %project_name%
	Notify the user to change the dates of work	Project change %project_code% %project_name%
	Notify the user to change the dates of milestone	Milestone changes in project %project_code% %project_name%
	Remind employees about the untimely completed jobs	Not completed activities in the project %project_code% %project_na
	Remind employees about the upcoming activities	Upcoming activities in project %project_code% %project_name%
	New vacation request received	Approved vacation request %request_start_date% - %request_finish_
	Cancellation of leave request	Rejected vacation request %request_start_date% - %request_finish_
	email_art.vacation_request	new vacation request for approval %request_start_date% - %request_

The button **New e-mail templates** allows you to create your own e-mail templates.

In the column **Actions**



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

Types of e-mail templates

- Temporary Password - where you can create templates via the user's access data.
- API-access key – where you can create templates via API-access key of users. You need 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**
- Notification of users about negative effort
- Remind employees about ** The upcoming activities**
- Remind employees about **The untimely completed jobs**
- Approval of vacation request
- Cancellation of vacation request
- New vacation request received
- Vacation planning - no approval of vacation request
- Vacation planning - New vacation request received
- Vacation planning - Cancellation of vacation request
- Time sheet - New confirmation received
- Time sheet - New effort change received
- Warning for conflicts in the cross-project links

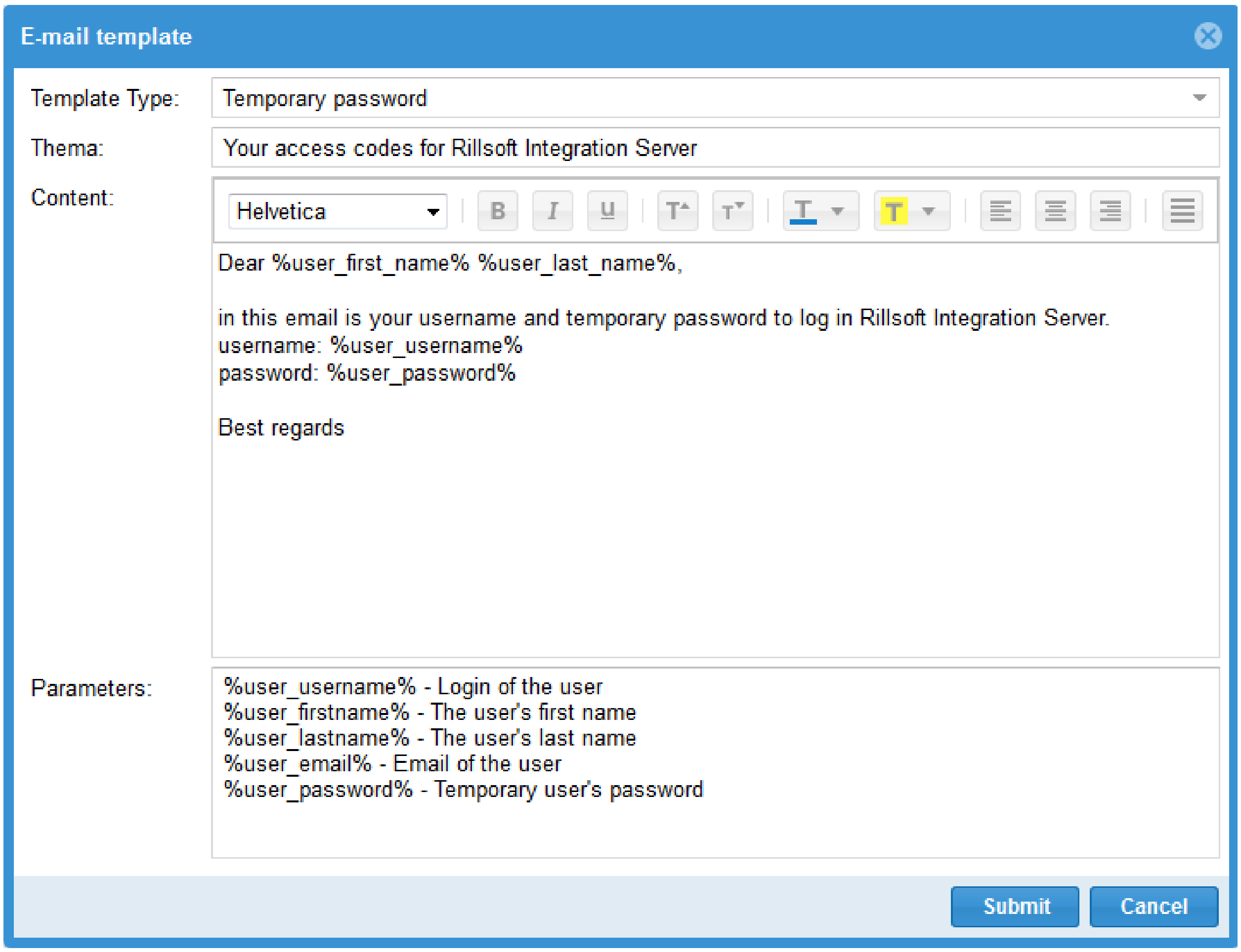
Tip!

1. Depending on type of e-mail template you can find different project information in the field **Parameters**.
2. In all templates subject and text content can be freely defined from the corresponding available parameters per template.

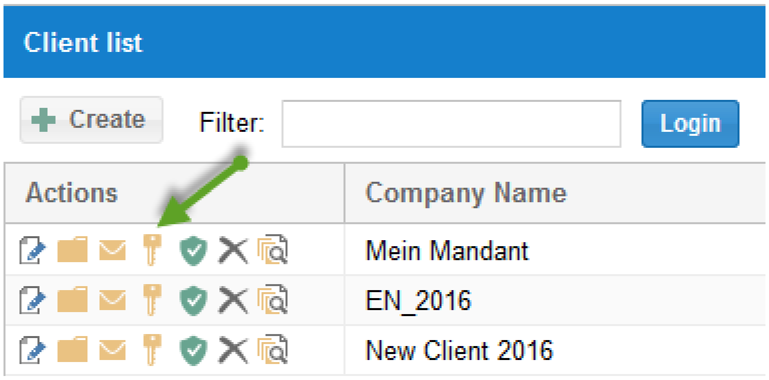
Edit a template

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

you can edit an e-mail template.

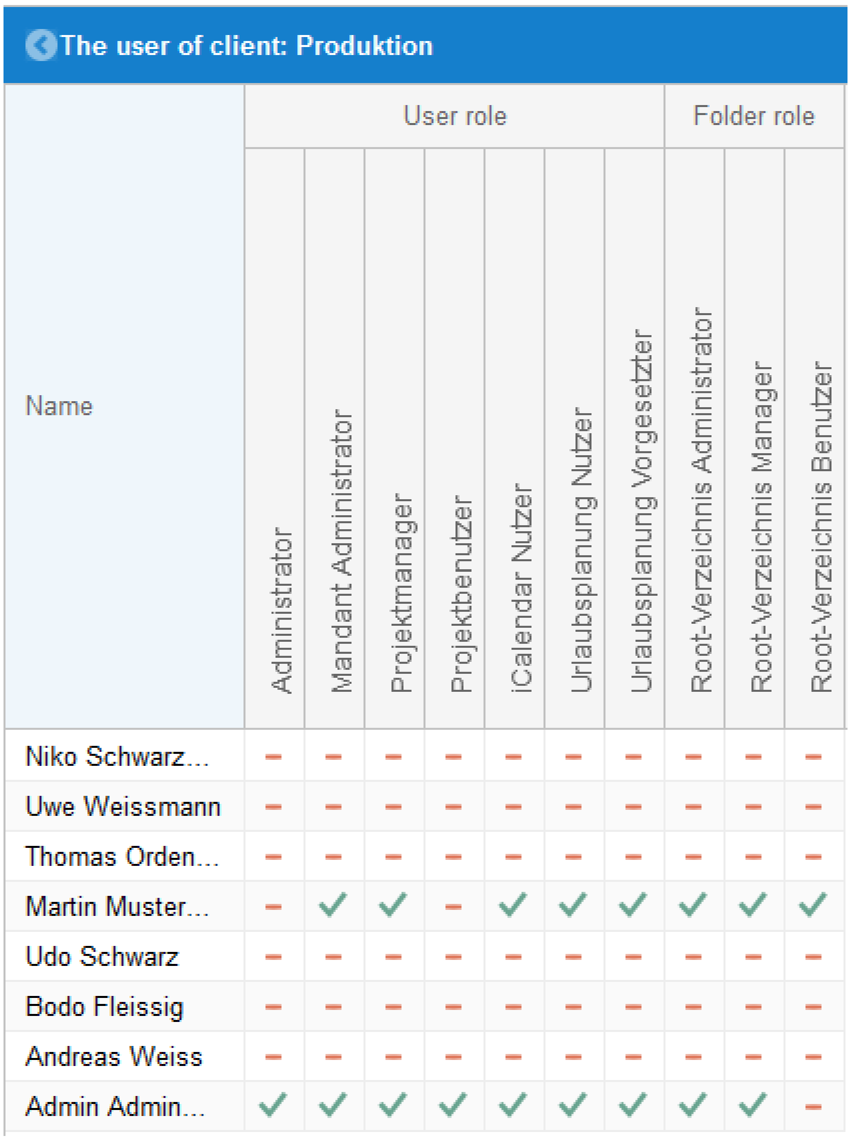


1.5.5 Client's user list



First select **Administration > Clients**.

Here you can get a user list of the client and his roles by clicking on the button **Key**.


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 symbols are not grayed out, you can change it.

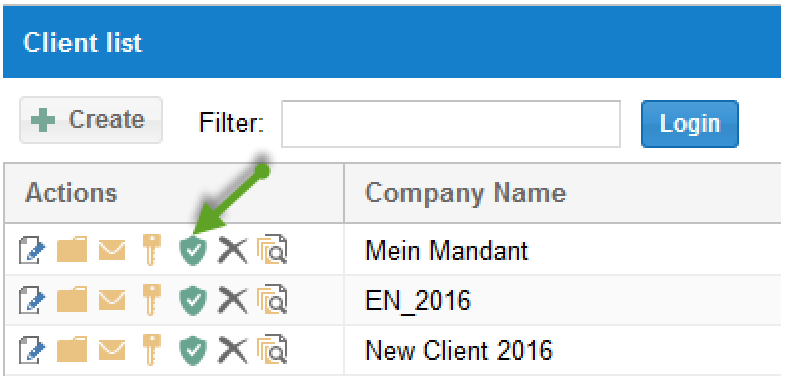
1.5.6 Floating licenses of clients

Requirements First, the floating license should be activated.

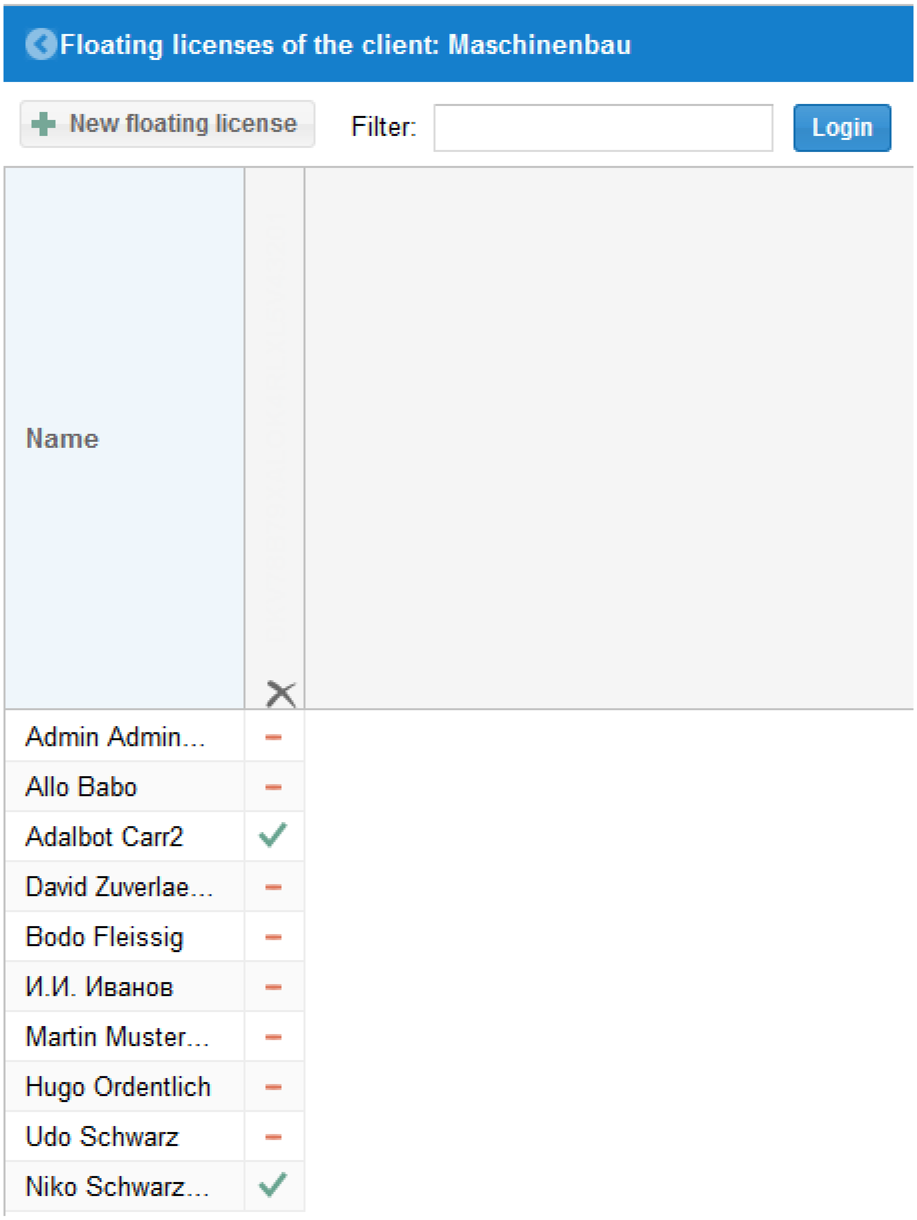
If you have floating licenses, you can assign them to users.

First select **Administration > Clients**.

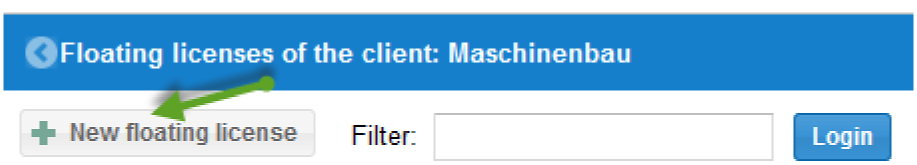
Click on the button **Shield**.



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



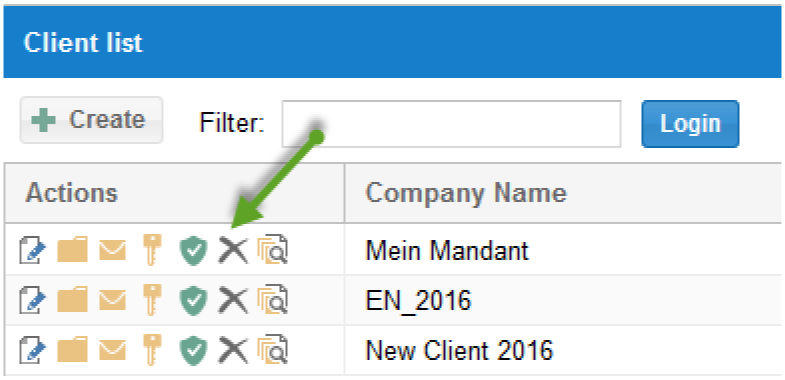
You can add new floating license by clicking on the following button.



1.5.7 Delete a client

First select **Administration > Clients**.

After the clicking on the button

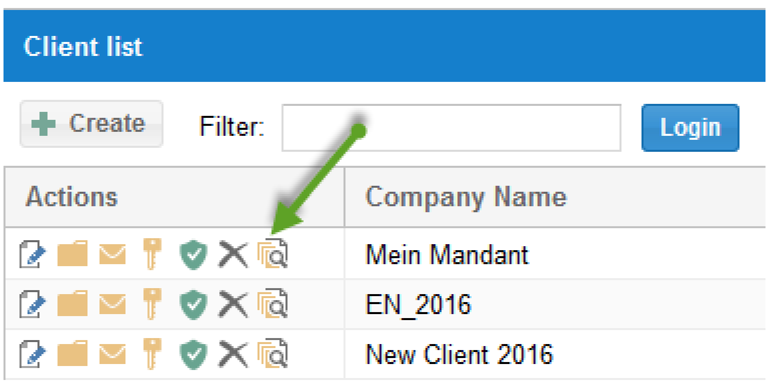


you can delete a client.

1.5.8 Resource pool versions of the client

First select **Administration > Clients**.

After clicking on the button



you will receive a list of resource pool revisions of the client.

Resource pool revision history: EN_2016

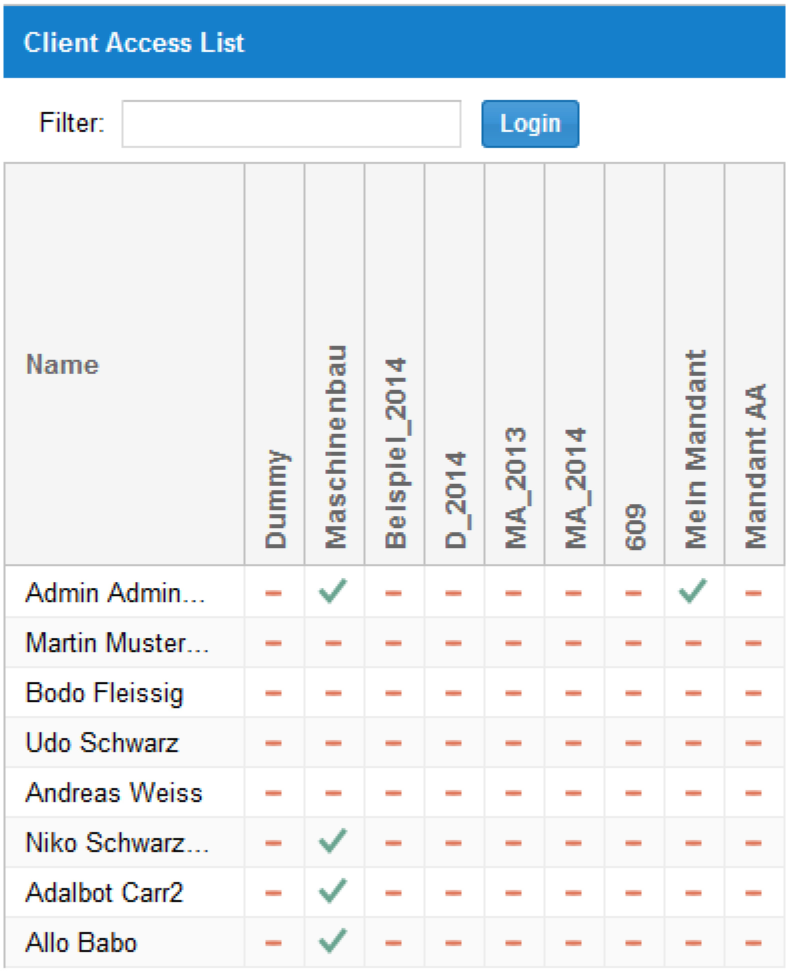
Actions	Revision	Lock at	User
	93	2016-03-04 13:03:59	Admin AdminMan
	92	2016-03-04 13:01:44	Admin AdminMan
	90	2016-03-04 12:59:31	Admin AdminMan
	78	2016-03-04 12:53:32	Admin AdminMan
	76	2016-02-22 12:43:15	Admin AdminMan
	73	2016-02-17 18:54:42	Admin AdminMan
	72	2016-02-17 09:13:50	Admin AdminMan
	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 resource pool version

If you want to return to the selected resource pool version, click on the button .

1.6 Clients share

First select **Administration > Client release**.



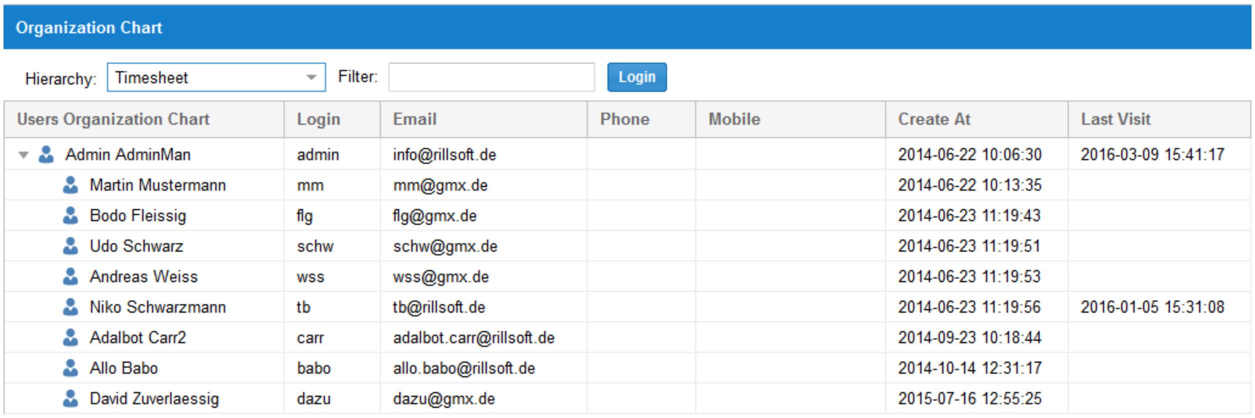
On the clients share page you can check and specify if a user can work with a client. Here are clients (vertical columns) and users displayed (horizontal rows). The view provides a quick overview, what users have access privileges for individual clients.

Note: Only here, you can unlock an user for a client by clicking on the icon button. The button indicates that the user can work with the client.

Note: Clients share is not sufficient for access to the client's information, such as resource pool project, portfolio, etc.

Important! Apart from the general permission to work with a client, you should assign to auser corresponding directory and user roles.

1.7 Organization chart


Organization Chart

Hierarchy: Timesheet Filter: Login

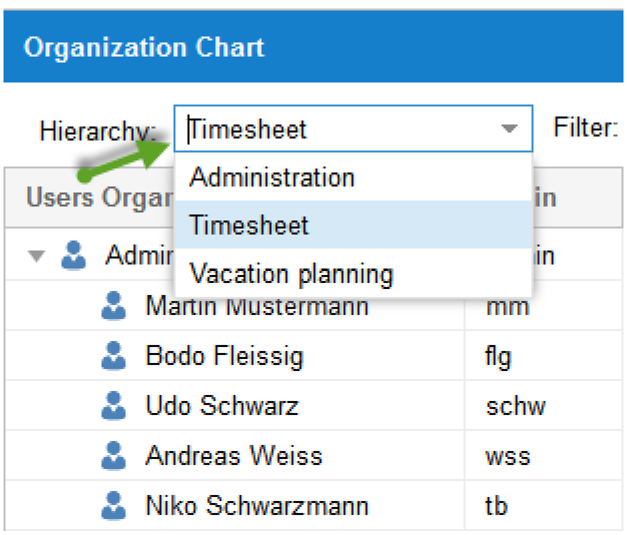
Users Organization Chart	Login	Email	Phone	Mobile	Create At	Last Visit
Admin AdminMan	admin	info@rillsoft.de			2014-06-22 10:06:30	2016-03-09 15:41:17
Martin Mustermann	mm	mm@gmx.de			2014-06-22 10:13:35	
Bodo Fleissig	flg	flg@gmx.de			2014-06-23 11:19:43	
Udo Schwarz	schw	schw@gmx.de			2014-06-23 11:19:51	
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	

The hierarchy is relevant for Administration, E-mail notifications, Timesheet, Calendar, Timeline and Vacation planning.

Here you can see a list of all users according to hierarchy.

There are 3 types of organization chart:

- Administration (email notification, iCalender, timeline)
- Timesheet
- Vacation planning

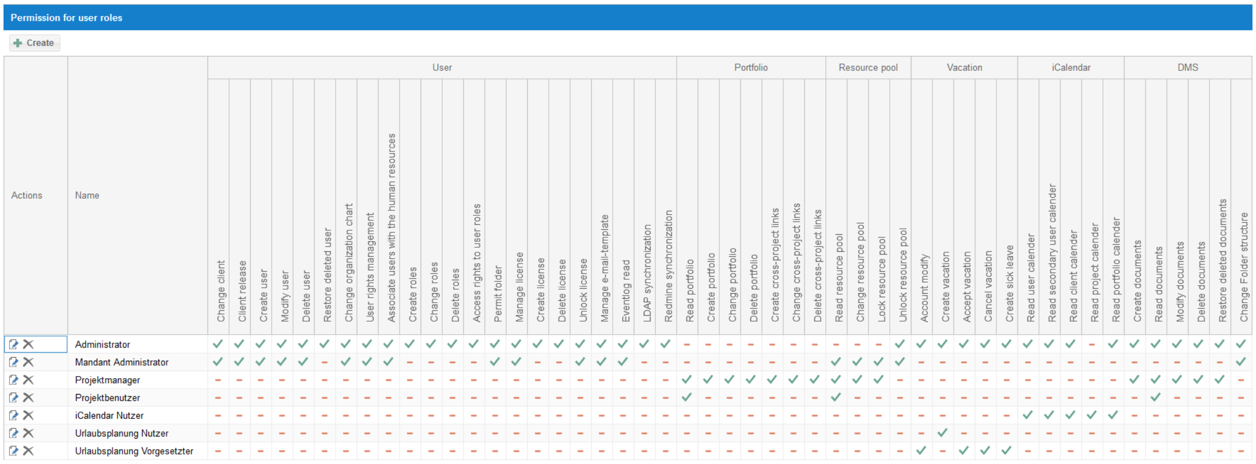


Change layout

1. First, select an organization chart type that you want to change, by clicking on the field **Administration** and select preferred organization chart type.
2. Via **Drog & Drop** you can change the layout.

1.8 User roles

First select **Administration > User roles**.



Permission for user roles

Create

User

Name	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	Redmine synchronization
Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mandant Administrator	✓	✓	✓	✓	✓	–	✓	✓	✓	–	–	–	–	✓	✓	–	–	✓	✓	✓	–	–
Projektmanager	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–
Projektbenutzer	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–
iCalendar Nutzer	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–
Urlaubsplanung Nutzer	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–
Urlaubsplanung Vorgesetzter	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–

Portfolio

Resource pool

Name	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
Administrator	–	–	–	–	–	–	–	–	–	–	✓
Mandant Administrator	–	–	–	–	–	–	–	✓	✓	✓	✓
Projektmanager	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	–
Projektbenutzer	✓	–	–	–	–	–	–	✓	–	–	–
iCalendar Nutzer	–	–	–	–	–	–	–	–	–	–	–
Urlaubsplanung Nutzer	–	–	–	–	–	–	–	–	–	–	–
Urlaubsplanung Vorgesetzter	–	–	–	–	–	–	–	–	–	–	–

Vacation

iCalendar

DMS

Name	Account modify	Create vacation	Accept vacation	Cancel vacation	Create sick leave	Read user calender	Read secondary user calender	Read client calender	Read project calender	Read portfolio calender	Create documents	Read documents	Modify documents	Delete documents	Restore deleted documents	Change Folder structure
Administrator	✓	✓	✓	✓	✓	✓	✓	✓	–	✓	✓	✓	✓	✓	✓	✓
Mandant Administrator	–	–	–	–	–	–	–	–	–	–	–	–	–	–	–	✓
Projektmanager	–	–	–	–	–	–	–	–	–	–	✓	✓	✓	✓	✓	–
Projektbenutzer	–	–	–	–	–	–	–	–	–	–	–	✓	–	–	–	–
iCalendar Nutzer	–	–	–	–	–	✓	✓	✓	✓	✓	–	–	–	–	–	–
Urlaubsplanung Nutzer	–	✓	–	–	–	–	–	–	–	–	–	–	–	–	–	–
Urlaubsplanung Vorgesetzter	✓	–	✓	✓	✓	–	–	–	–	–	–	–	–	–	–	–

Rillsoft Integration Server provides seven predefined user roles to work with user management, project portfolio, resource pool and additional modules such as iCalendar.

- Administrator
- Client Administrator
- Project manager
- Project user
- iCalendar user
- Vacation planning-user
- Vacation planning supervisor

The user roles define rights for **Folder independent activities** such as user management, and working with portfolio and the resource pool.

In the menu item **Administration/User roles** you can observe and define, what activities with assigned user role are available.

To work with Rillsoft Project is at least required access right to user roles:

- Read resource pool

All possible actions can be distributed according to the following groups.

User management

- change client - change client
- client share - a link between a client and users

Caution! If a user has no access for a client, he cannot open and edit resource pools or projects of this client in Rillsoft Project.

User management

- 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 licenses
- create licenses
- delete licenses
- unlock licenses
- manage e-mail templates
- eventlog read
- LDAP synchronization
- Redmine 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

- account modify
- create vacation
- accept vacation
- cancel vacation
- create sick leave

Work with additional modules iCalendar and Timeline

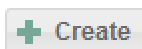
- read user calendar
- read secondary user calendar
- read client calendar
- read project calendar
- read portfolio calendar

Working with DMS

- create documents
- read documents
- modify documents
- delete documents
- restore deleted documents
- change folder structure

New user roles

You can create a separate user role by

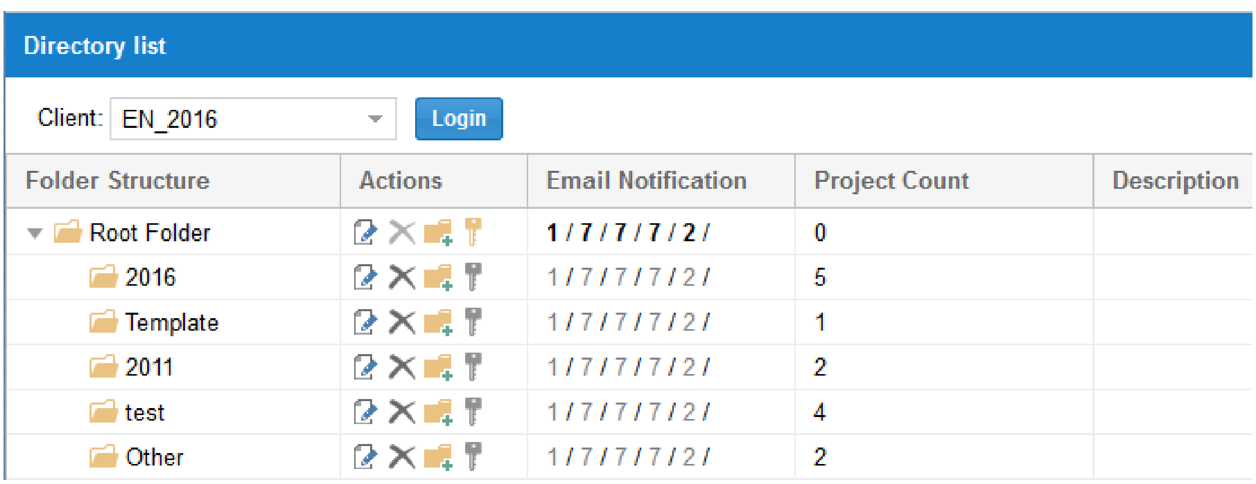
1. clicking on the button 

2. entering a name for role and adding notes, if necessary.
3. clicking on **Save**.

1.9 Folders

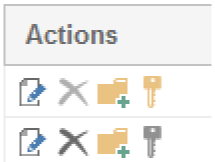
First select **Administration > Clients**.

Here you can customize any structure of the clients' portfolio.



You can move folder via **Drag & Drop** to preferred position.

In addition, the following functions are available:



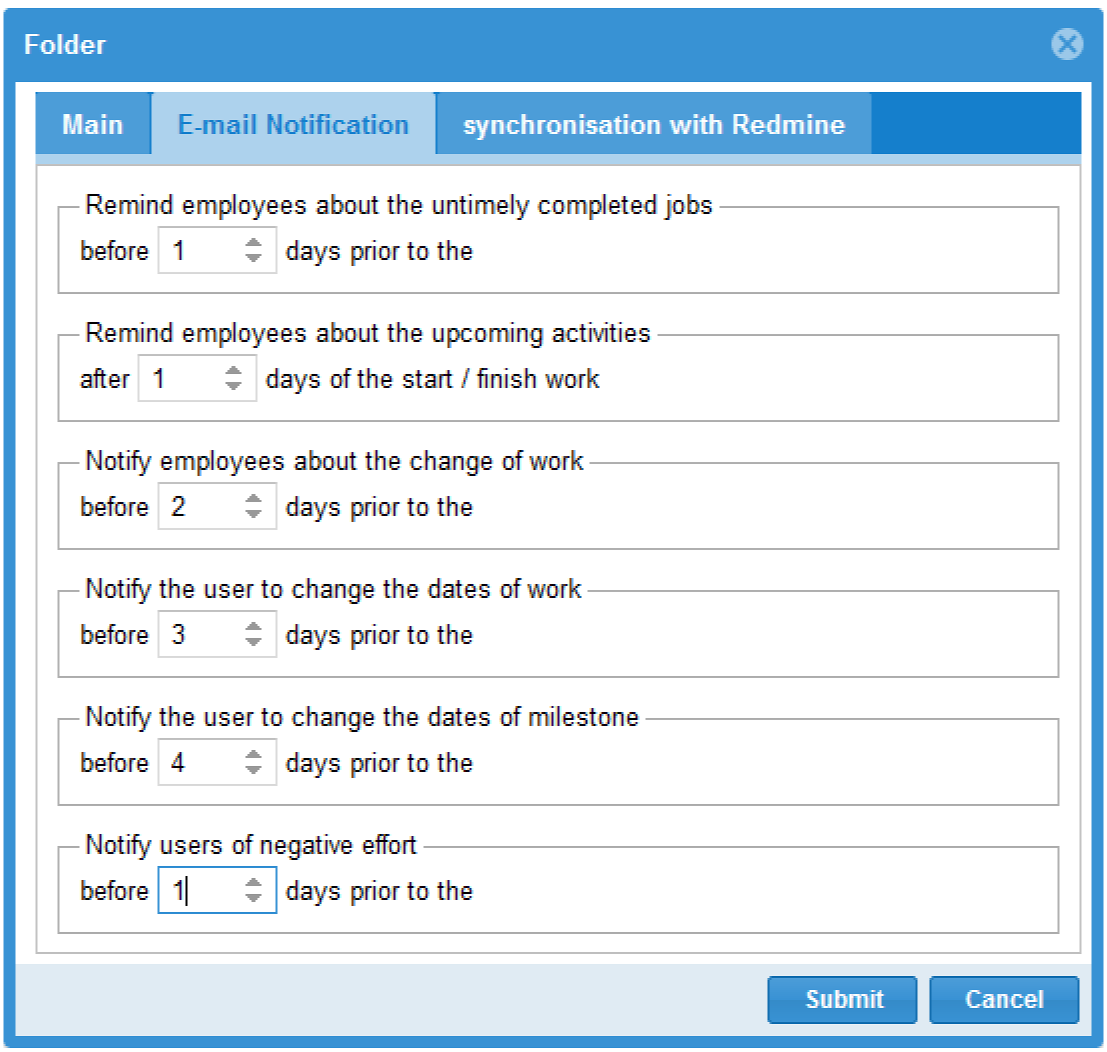
	**Change the name and description of the folder**
	Define time limits for e-mail notification
	**Delete folder**
	**Create a new subfolder**
	**Change access rights for the folder**

Tip! A yellow key indicates that some of the existing folder roles are assigned to the folder (folder structure column).

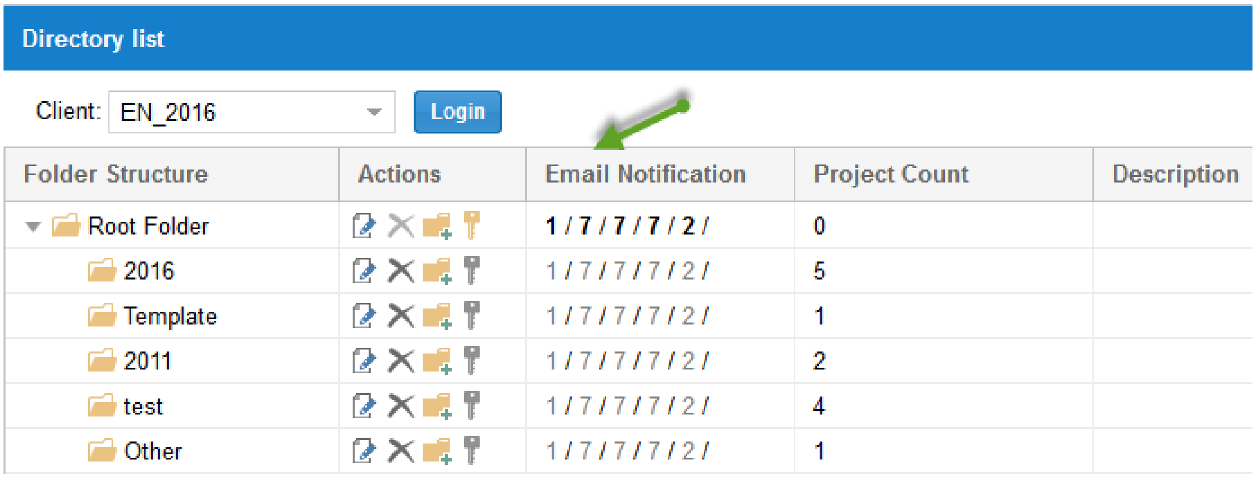
A grey key indicates that the access rights for the folder have been taken from the root folder.

Time limits for e-mail notification

After clicking on the button **Note with a pen** you can set a period of time for tasks.



The column **E-mail notification** represents all time periods.



Remind employees about **The untimely completed jobs**, that must have been completed X days ago.

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

- the activity start lies within the time gap between the current date minus X (e.g. 2) days and the percentage completion for this activity is equal to 0.
- the activity end lies within the time gap between the current date minus X (e.g. 2) days and the percentage completion for this activity is less than 100.

Remind employees about ** The upcoming activities**, that must be completed X days in advance. If the option is on, the employees, who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 3) days, will be warned by e-mail. For instance, today is the 15th of July and 3 days are entered, then the period is from 15.07 to 18.07.

Notify employees about **The change of work**, that must be completed X days in advance. If the option is on, the employees, who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 1) days,will be warned by e-mail and the time limits will be shifted.

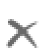
Notify users about **The change of work**, that must be completed X days in advance. If the option is on, the employees,who have subordinate employees and who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 7) days, will be warned by e-mail and the time limits will be shifted. You can define subordinate employees by clicking on the menu item **Administration/User**, column **Actions**, button . The field **Filter** should be empty.

Notify users about **The change of milestone dates**, that must be completed X days in advance If the option is on, the users will be notified by e-mail, in case of milestone dates shifts.

Caution!

The first e-mail notification lists all activities from the project start up e.g. 17.07. Then new activities will be added which means that if the information, e.g. a1, related to a certain activity has been already sent, the employees will not get e-mails about this activity that lies in the mentioned time gaps.

Delete folder

Click on the icon button 

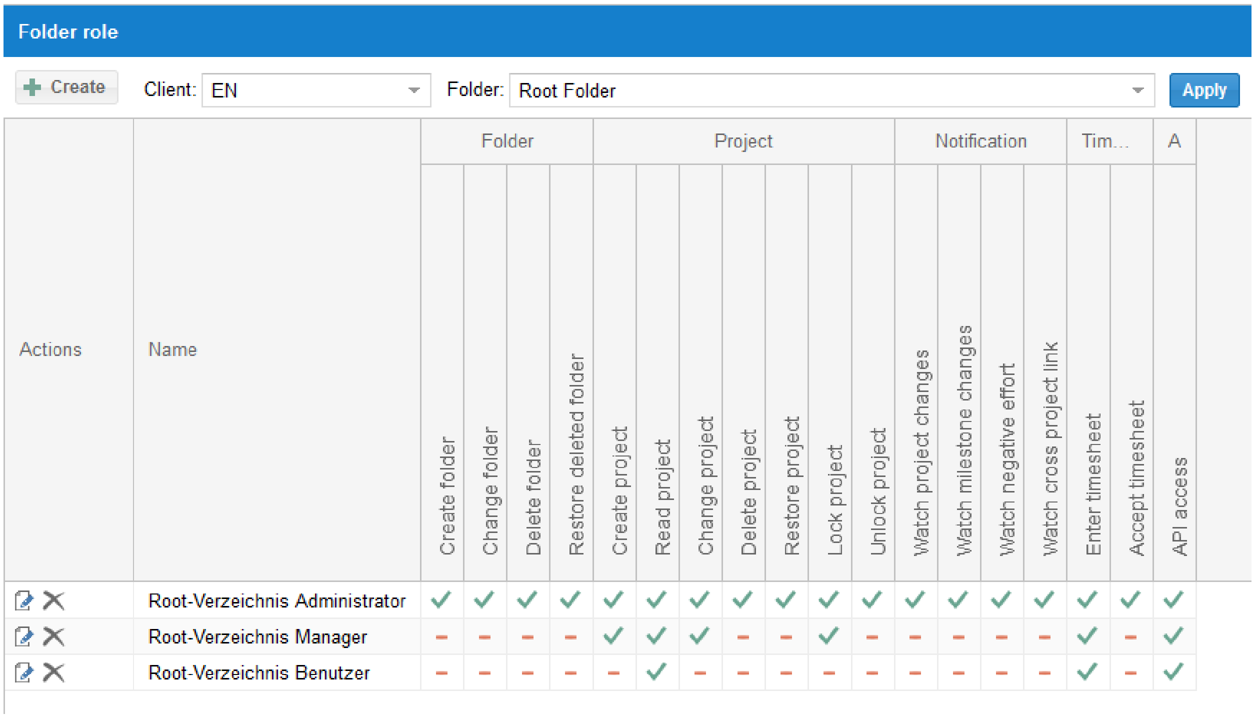
Create a new subfolder

- Click on the icon button 
- Click on the icon button  in the row of the new folder and enter a name and description of the new folder.

Change access rights for the folder

- Click on the icon button 
- Change access rights.

Note: Root folder access rights are also valid for subfolders, if not otherwise specified.

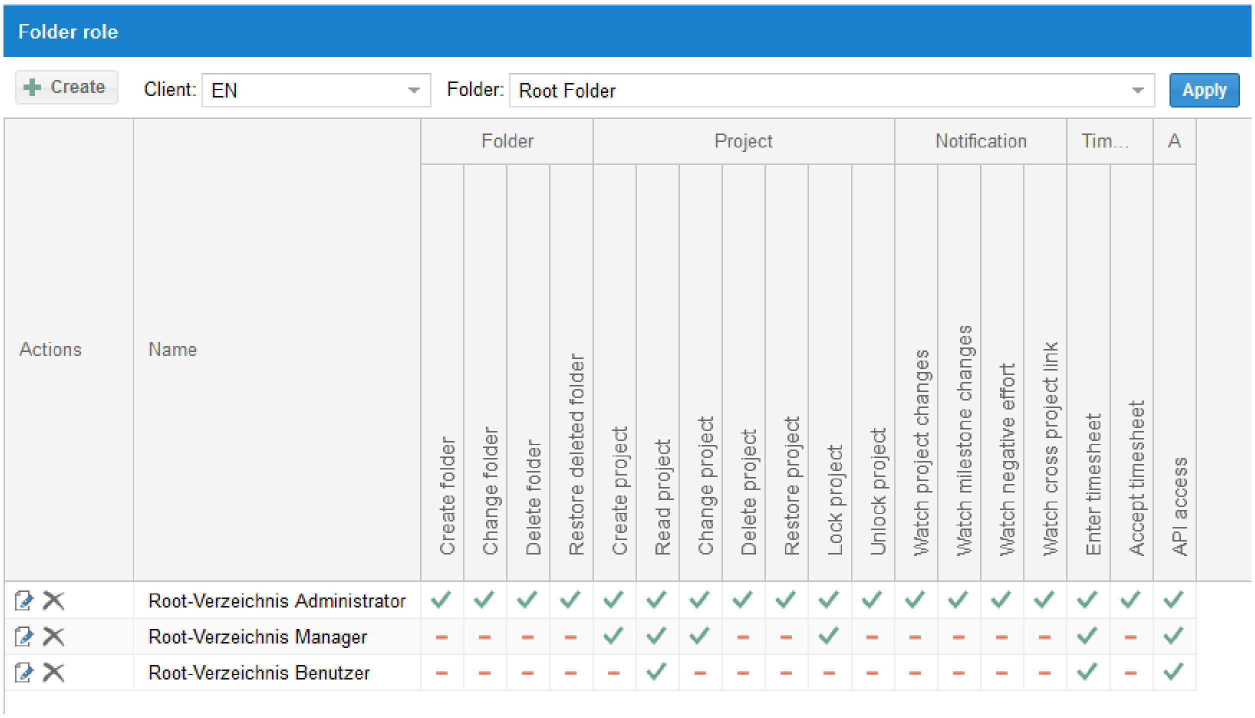


Folder role

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	–	–	–	–	–	✓	–	–	–	–	–	–	–	–	–	✓	–	✓

1.10 Folder roles



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	–	–	–	–	–	✓	–	–	–	–	–	–	–	–	–	✓	–	✓

Folder roles and the access rights depend on client and folder.

- Set for what folders and clients access rights should be set by clicking on the symbol button key in the corresponding row.

Note: Root folder access rights are also valid for subfolders, if not otherwise specified.

A dimmed out tick indicates that the access rights of the folder role in the root folder have been defined. All possible actions can be distributed according to 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

API

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

New folder role

After clicking on the button 

you can create a new folder role.

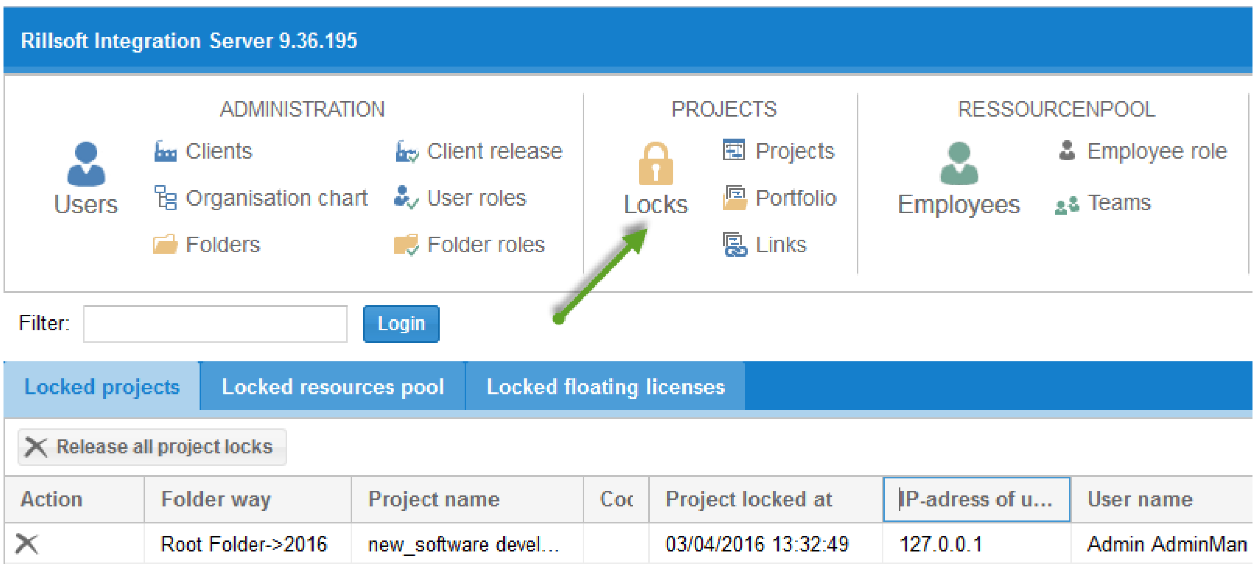
Edit folder role

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

CHAPTER TWO

PROJECTS

2.1 Lock



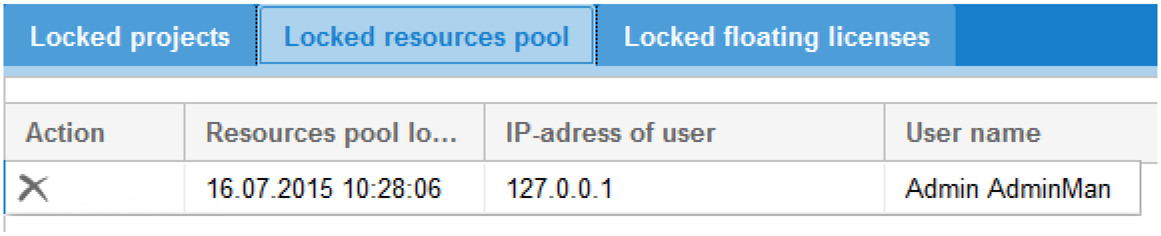
Lock displays in three tabs information if other users at the moment are

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

Locked projects

Here you get an overview of locked projects. In addition, you can observe when and who took the projects in editing. - If you have the appropriate access rights, you can unlock either all projects by clicking on the button Release all project locks - or unlock selected projects by clicking on the button in the column **Actions**.

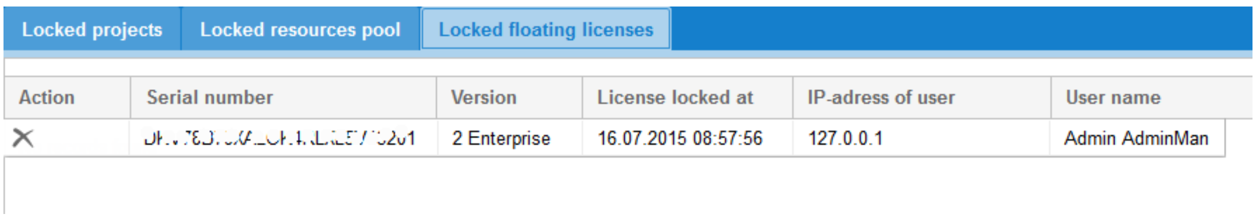
Locked resource pools



If a user opens the resource pool for editing, in the tab appears the information, when and who opened the resource pool for editing.

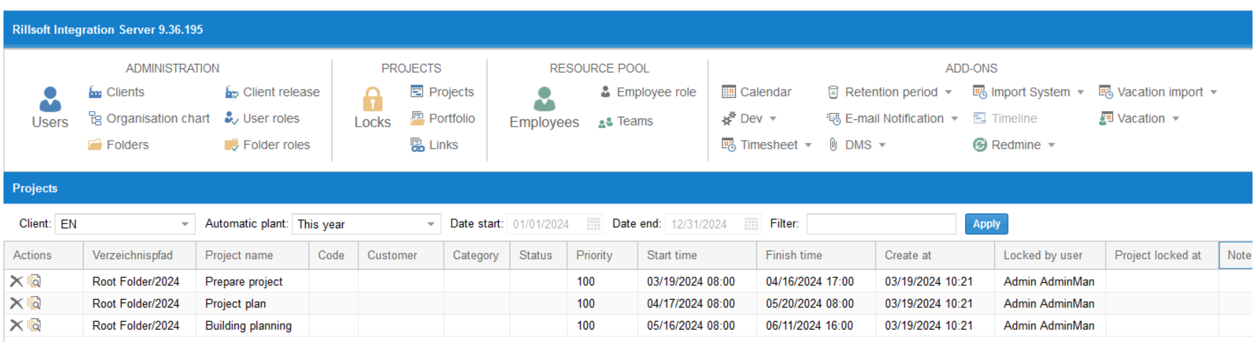
If you have the appropriate access rights, you can remove the lock by clicking on the button in the column **Actions**.

Locked floating licenses



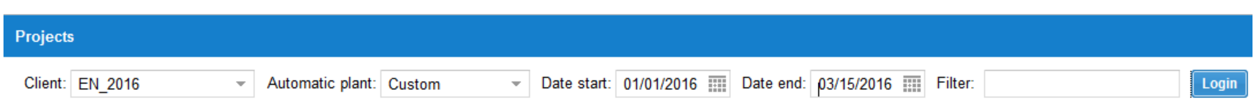
In this tab you have an overview about users who is working with a floating license at the moment. By clicking on the button in the column **Actions** you can complete a user session and provide users with a floating license again.

2.2 Projects



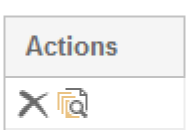
Here you can get an overview of all clients or projects selected according to different criteria.

The following selection criteria are available:



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

Functions



	Delete project
	Restore old project version

Restore Project version

After clicking the button you will get a list of all saved project versions.

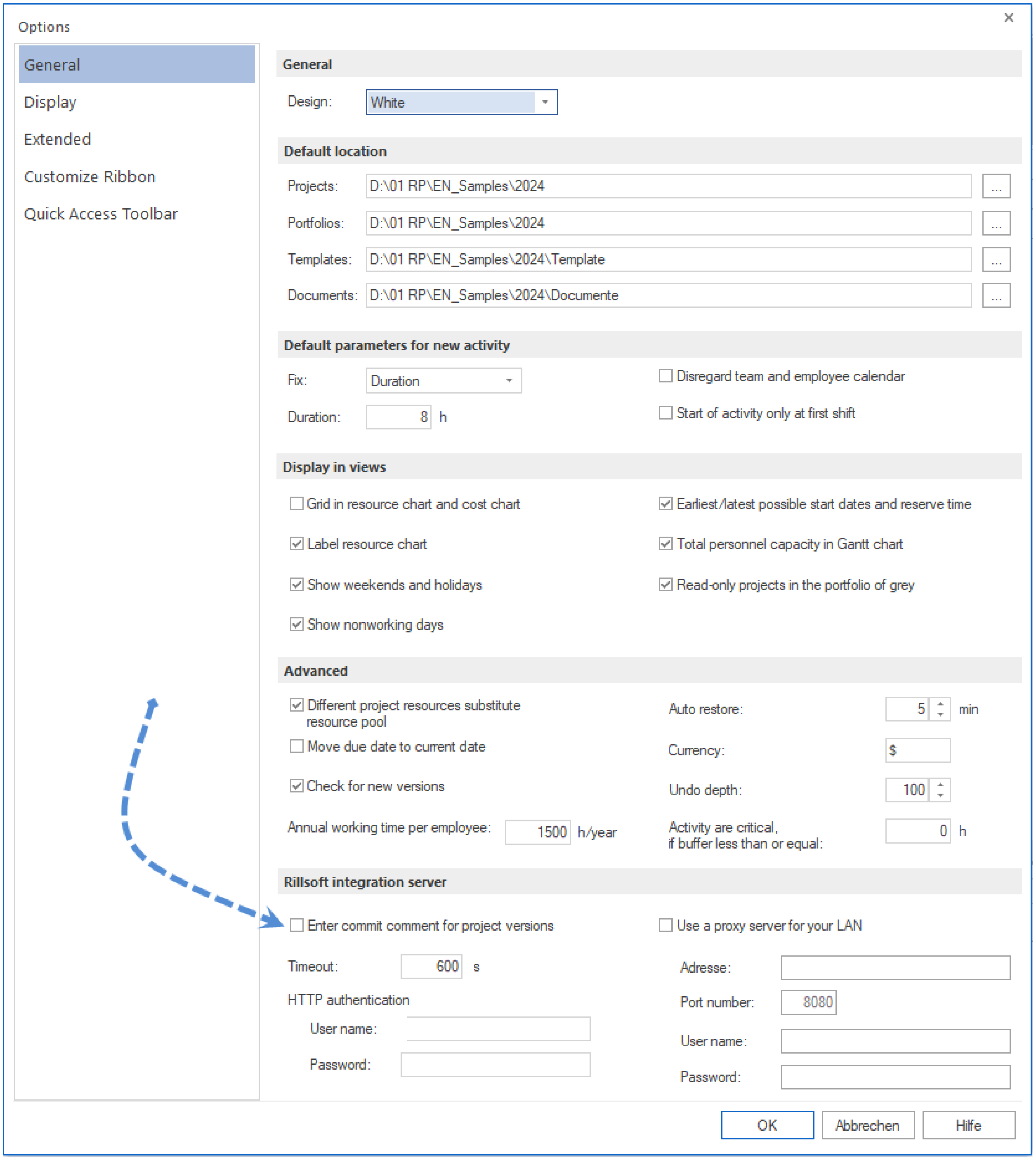
Project revision history: software development process

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	

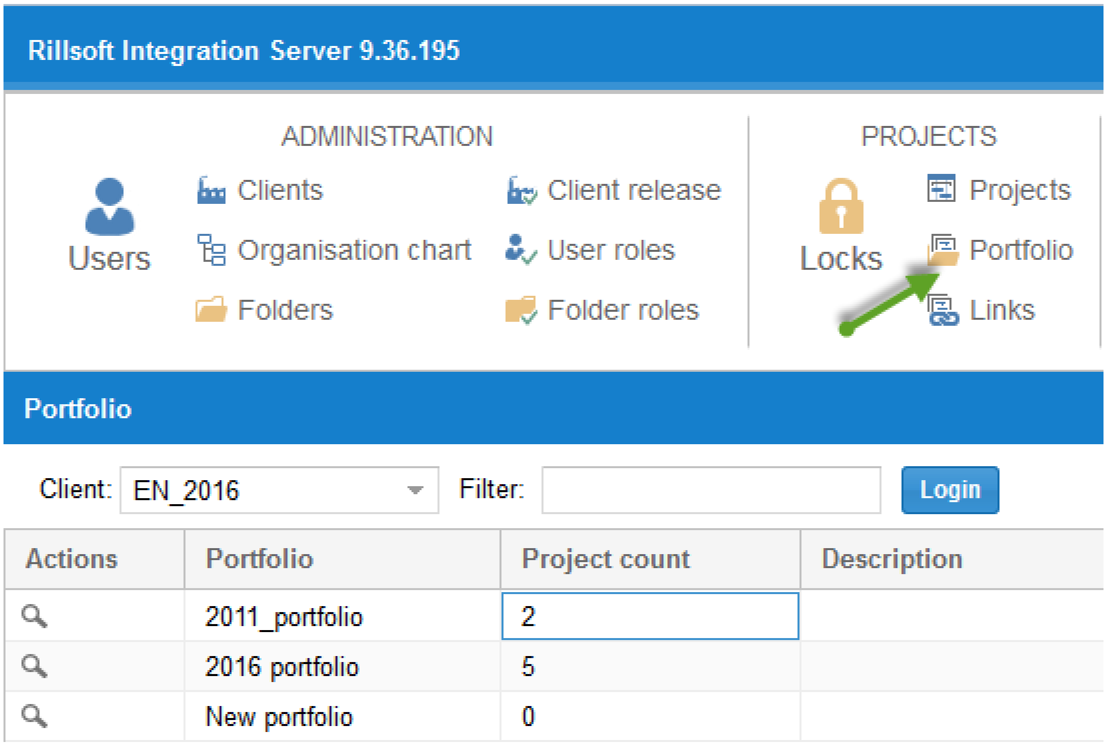
You can restore any version of project by clicking on the button

If you have given**Commit comments** saving the project, you can use it for orientation.

Note: It is possible, if the option **Enter commit comments for project versions** is switched on in Rillsoft project.


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
Disregard team and employee calendar
Start of activity only at first shift
Display in views
Grid in resource chart and cost chart
Label resource chart
Show weekends and holidays
Show nonworking days
Earliest/latest possible start dates and reserve time
Total personnel capacity in Gantt chart
Read-only projects in the portfolio of grey
Advanced
Different project resources substitute resource pool
Move due date to current date
Check for new versions
Annual working time per employee: 1500 h/year
Auto restore: 5 min
Currency: $
Undo depth: 100
Activity are critical, if buffer less than or equal: 0 h
Rillsoft integration server
Enter commit comment for project versions
Timeout: 600 s
HTTP authentication
User name:
Password:
Use a proxy server for your LAN
Adresse:
Port number: 8080
User name:
Password:
OK
Abbrechen
Hilfe

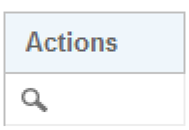
2.3 Portfolio



Here you can get an overview of all portfolios and their project number.

In the field **Filter** you can enter a search term for the columns **Portfolio**.

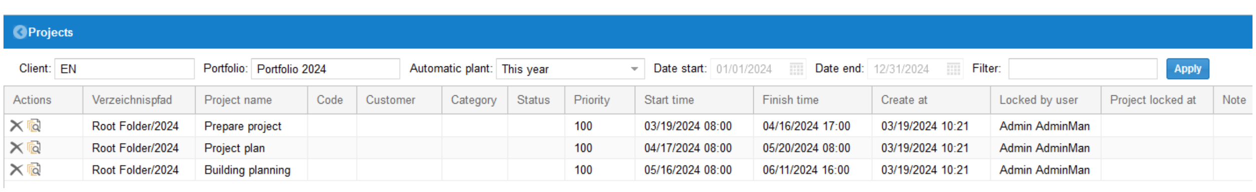
Functions



	Switch to projects in the portfolio

Switch to projects in the portfolio

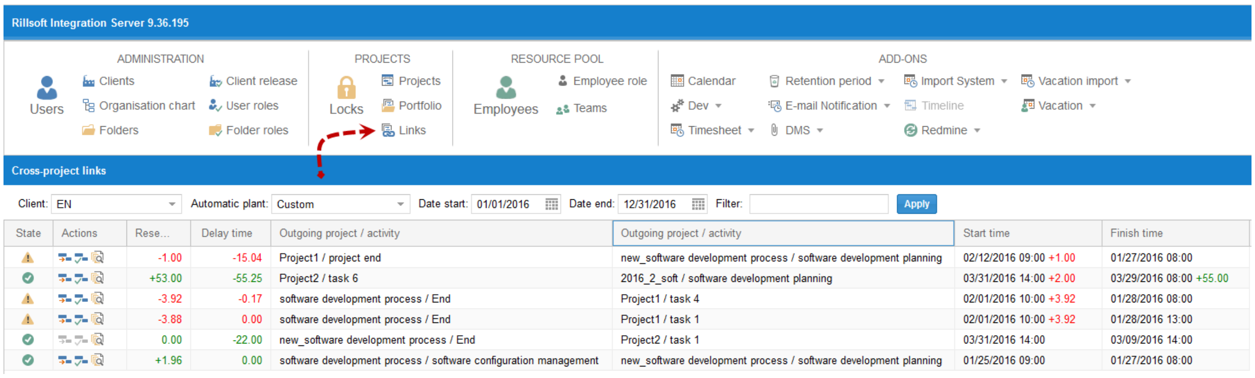
After clicking on the button in a row, you can see all projects related to the Portfolio.



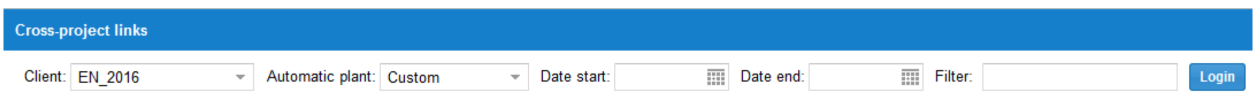
2.4 Links

Cross-project links are different from normal links in two points:

- Successor project is not shifted automatically, if a finish date of the predecessor project takes a new time position. But it sets a delay (negative or positive).
- Excluding a delay the cross-project link has a time reserve, i.e. after the linking two projects, the time difference between the end of a predecessor and the start of a successor is accepted not only as a delay but also as a reserve, if necessary.

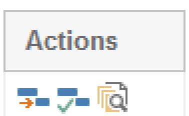


Here you can check and edit the cross-project links. The following selection criteria are available:



You can set time frames or box **Filter ** enter a keyword for the columns **Project / Activity**.

Functions



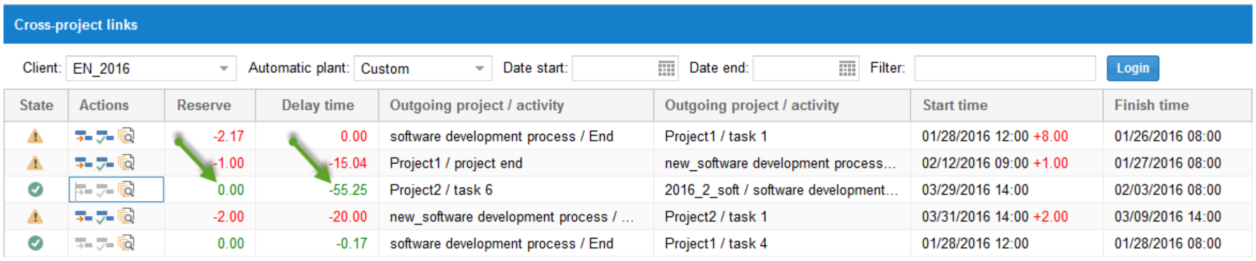
	Status accepted
	Conflict message
	Shift successor
	Correct delay by reserve
	Revision history

Status

The column **Status** can check whether any temporal changes related to the startor the end of the cross-project links were held and conflicts developed.

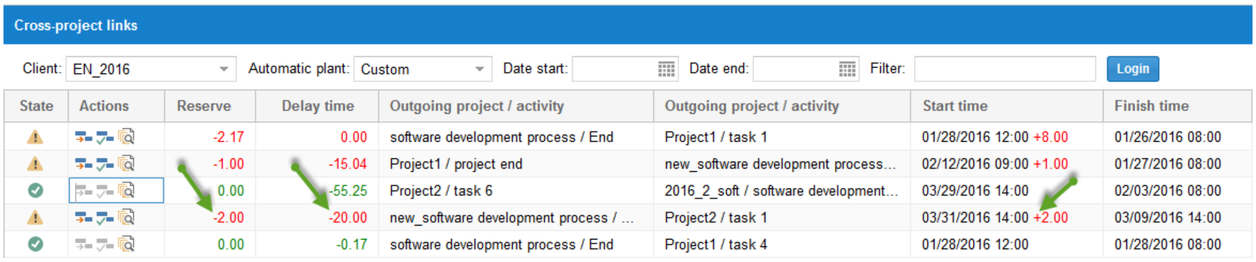
Time conflict

You have created a link between two planned projects, while the cross-project link was created with negative delay, because the second project starts earlier than the first project ends.



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

Then temporal shifts took place in the first project and, it means, that predecessor had ended the activity 7 days later than it was planned earlier.

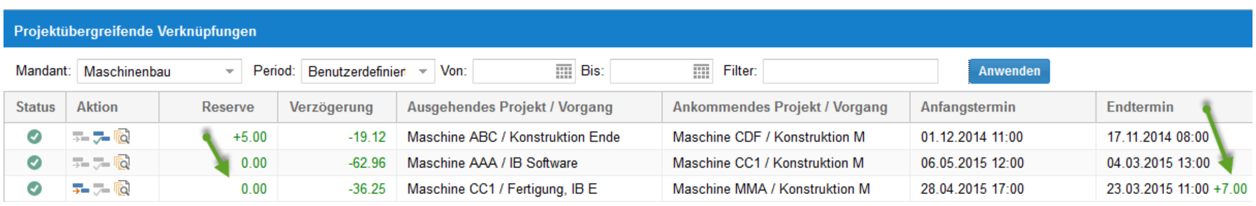


State	Actions	Reserve	Delay time	Outgoing project / activity	Outgoing project / activity	Start time	Finish time
		-2.17	0.00	software development process / End	Project1 / task 1	01/28/2016 12:00 +8.00	01/26/2016 08:00
		-1.00	-15.04	Project1 / project end	new_software development process...	02/12/2016 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 column **Reserve** provides you with information,for how many days original plan was changed. The **red** colour indicates that your time deficit has become greater. The **green** colour indicates that you have won a time reserve.

Shift successor

After clicking on the icon button the dates of the successor project are shifted because of the link to the reserve value.

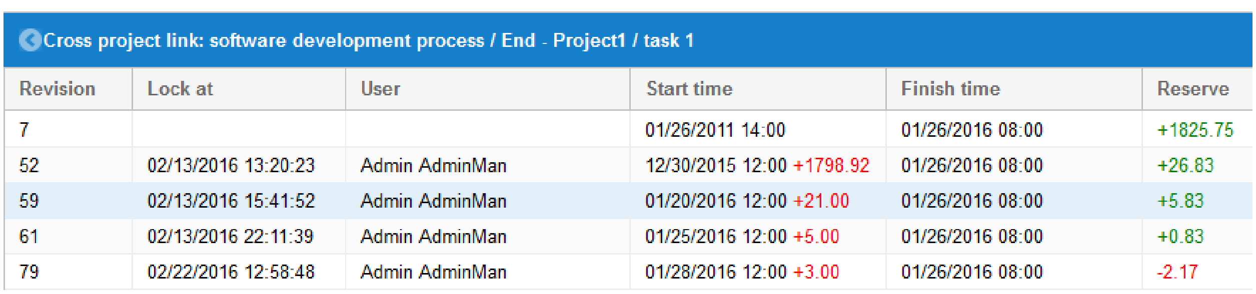


Status	Aktion	Reserve	Verzögerung	Ausgehendes Projekt / Vorgang	Ankommendes Projekt / Vorgang	Anfangstermin	Endtermin
		+5.00	-19.12	Maschine ABC / Konstruktion Ende	Maschine CDF / Konstruktion M	01.12.2014 11:00	17.11.2014 08:00
		0.00	-62.96	Maschine AAA / IB Software	Maschine CC1 / Konstruktion M	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

When you open the portfolio in Rillsoft project next time, you will get a message about changes in the successor project.

Revision history

After clicking on the icon button you can read history for linking.



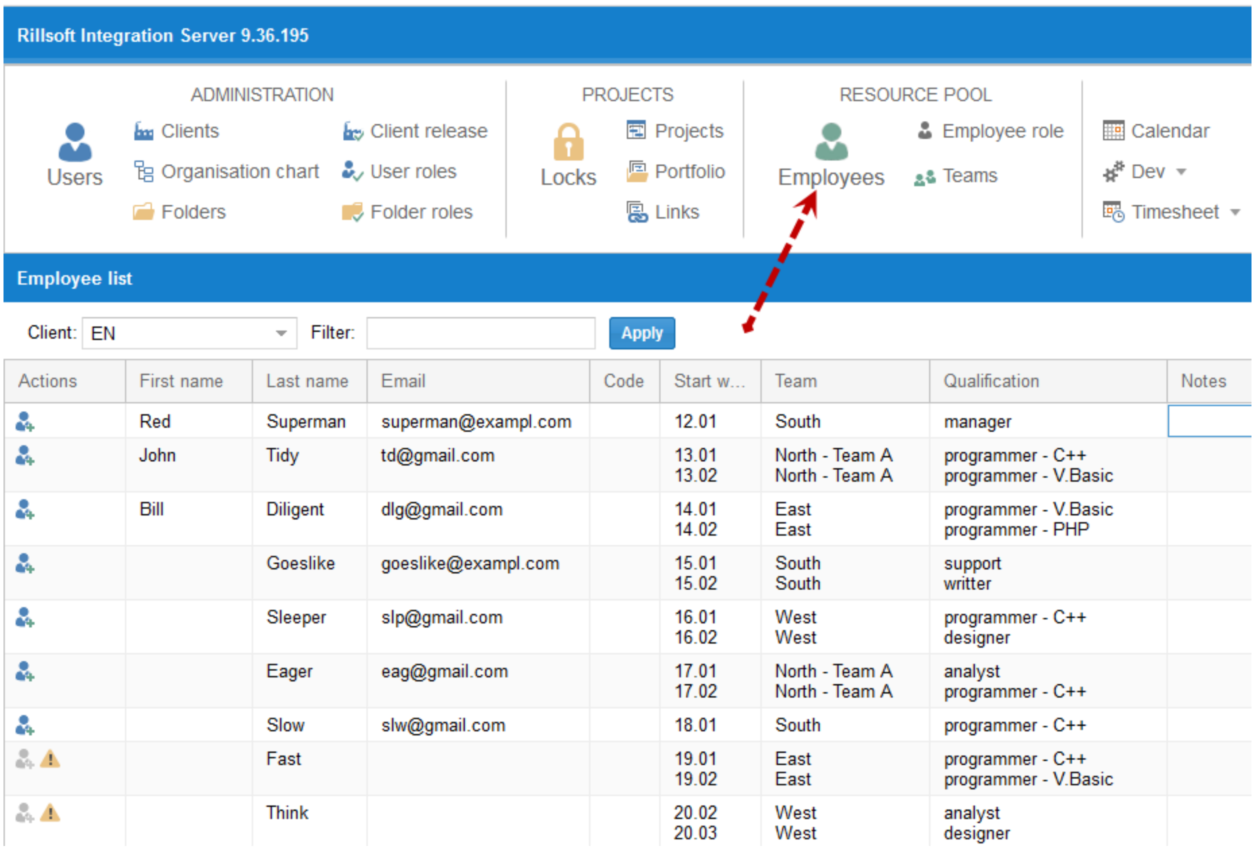
Revision	Lock at	User	Start time	Finish time	Reserve
7			01/26/2011 14:00	01/26/2016 08:00	+1825.75
52	02/13/2016 13:20:23	Admin AdminMan	12/30/2015 12:00 +1798.92	01/26/2016 08:00	+26.83
59	02/13/2016 15:41:52	Admin AdminMan	01/20/2016 12:00 +21.00	01/26/2016 08:00	+5.83
61	02/13/2016 22:11:39	Admin 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

Clicking on the icon button allows recalculating of the delay based on reservation.

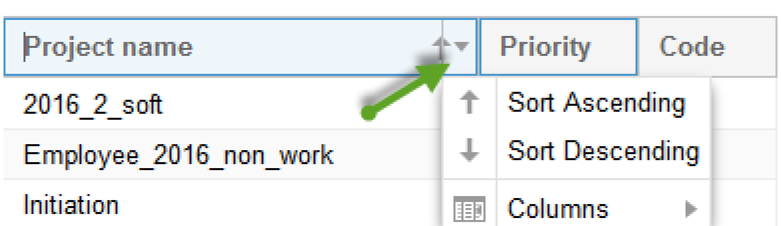
RESSOURCENPOOL

3.1 Employees



Here you get an overview of all personnel resources in the resource pool (of the client).

You can - enter a search term in the box **Filters** to limit the selection. - sort the list by any column by clicking on the arrow in the title area of the column.

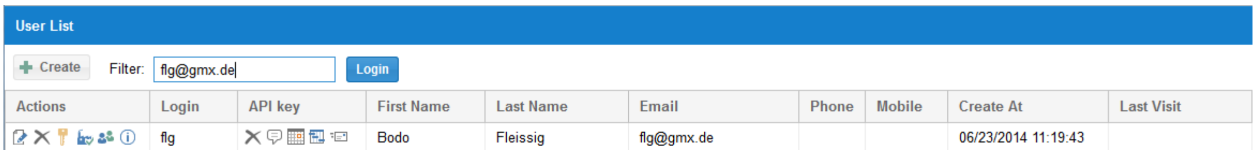


Convert personnel resource into users

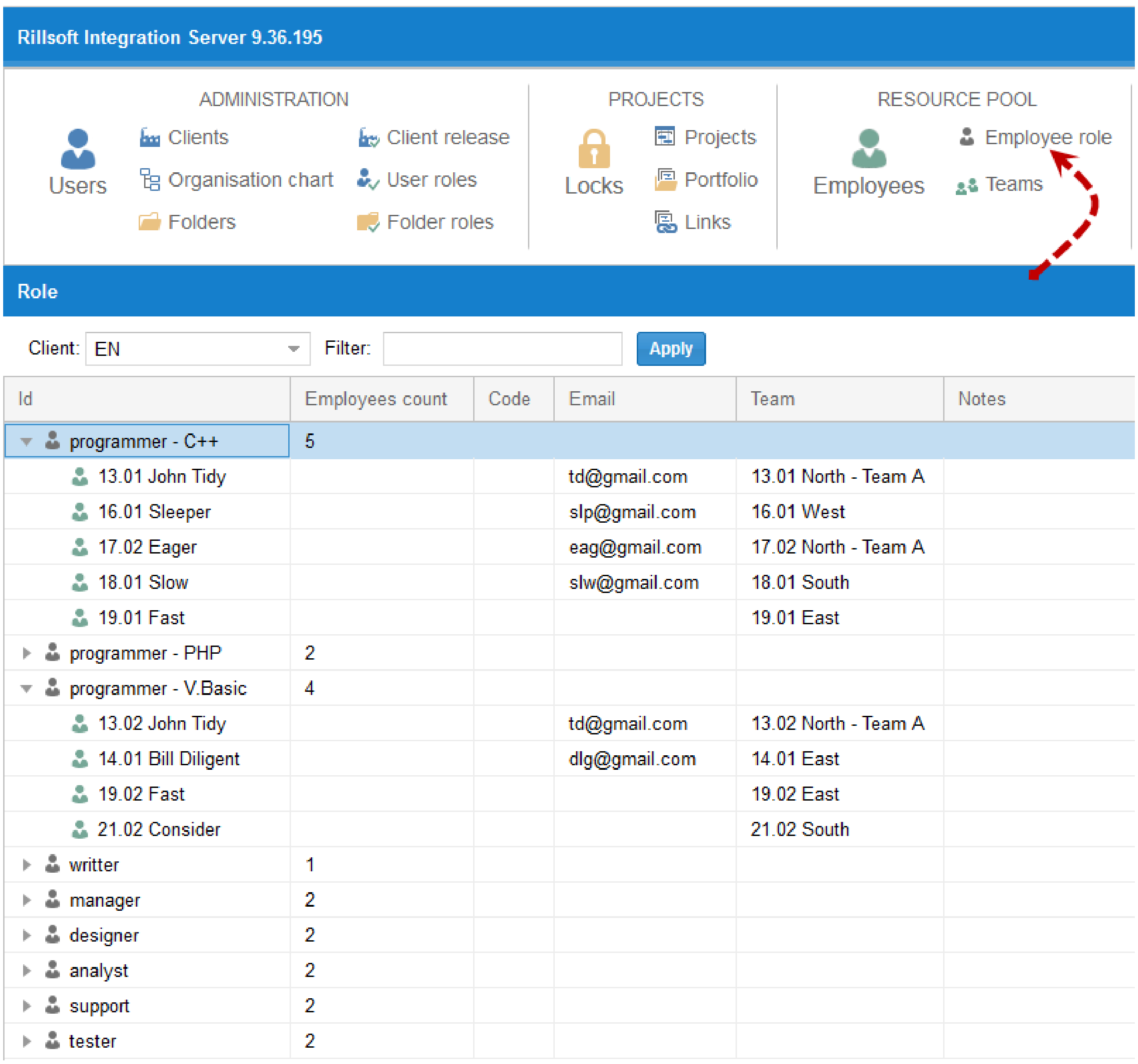
After clicking on the button in a row, a new user will be created from the personnel resource.

User data view

If you click on the button | image2 | in a row, the user information will be displayed.



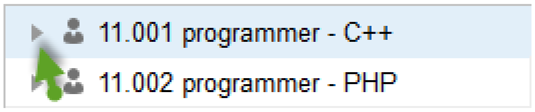
3.2 Roles



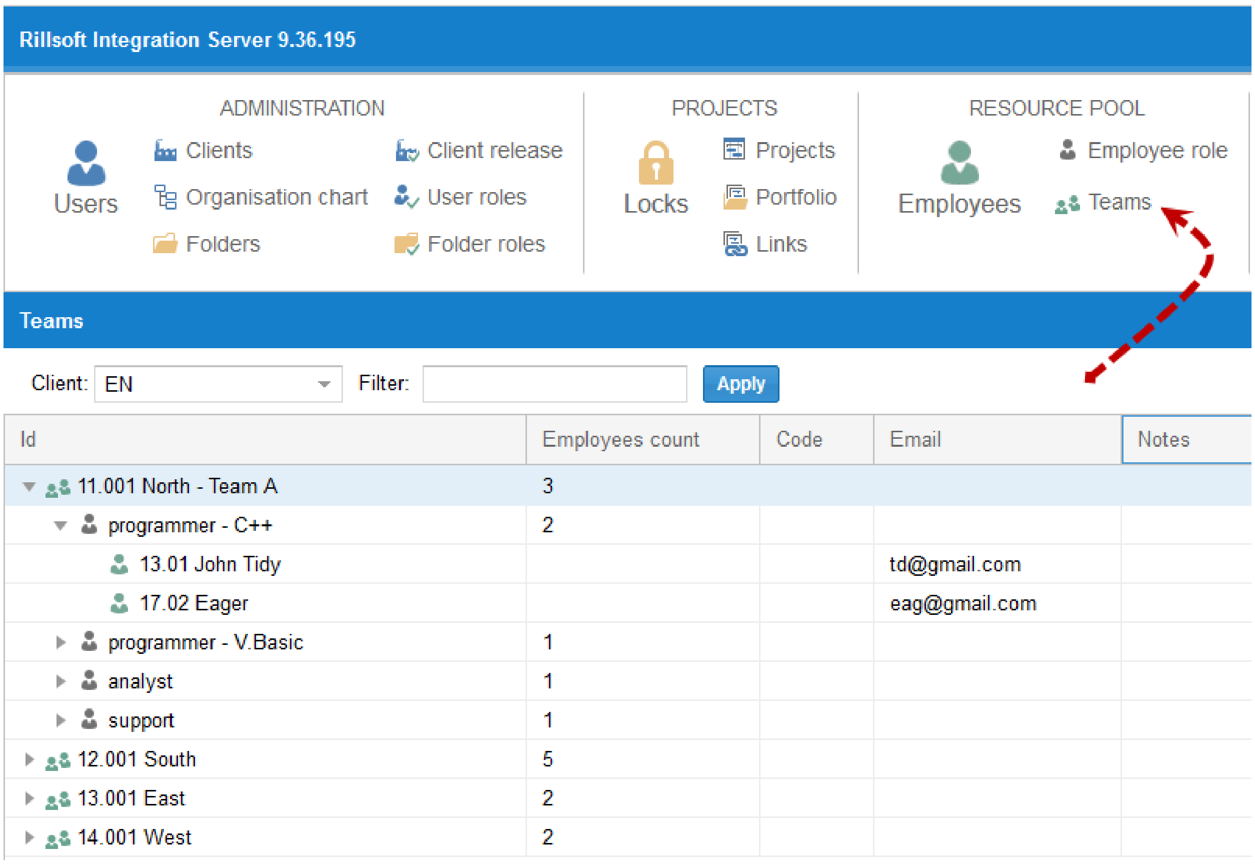
Here your personnel resources are listed according to their professional qualifications.

You can

- enter a search term in the box **Filters** to limit the selection.
- switch on/off employees of a certain role .



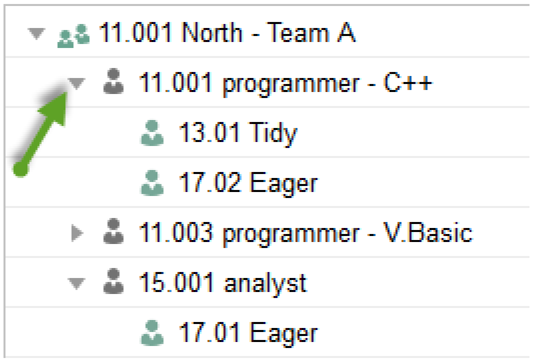
3.3 Team



Here your personnel resources are grouped according to teams.

You can

- enter a search term in the box **Filters** to limit the selection.
- switch on/off employees of a certain team and role.


11.001 North - Team A
11.001 programmer - C++
13.01 Tidy
17.02 Eager
11.003 programmer - V.Basic
15.001 analyst
17.01 Eager

CHAPTER

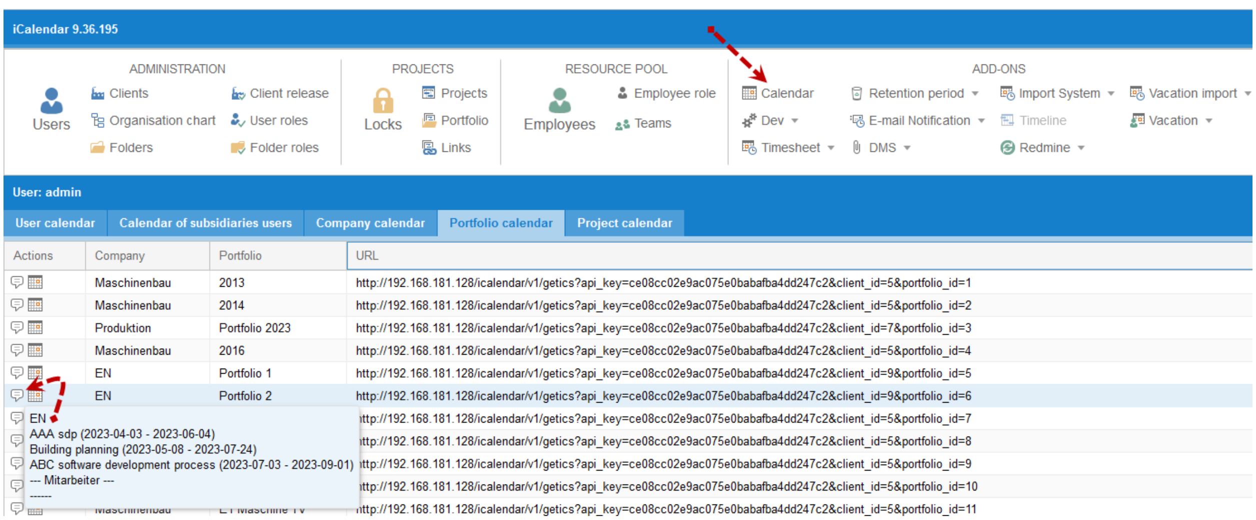
FOUR

ADD ONS

4.1 iCalendar

Functions

- **User Calendar** displays all the user activities cross project per client
- **Calendar subordinate users** represents all subordinate users activities (based on administration organization chart) cross project per clients
- **Clients Calendar** represents all clients' activities in all projects
- **Portfolio Calendar** includes all activities of a project portfolio
- **Project Calendar** provides all the project activities



The minimum requirement for using iCalendar is that a user has the **iCalendar user** user role and an **API access key** should be generated for each iCalendar user.

The module is based on the iCalendar standard.

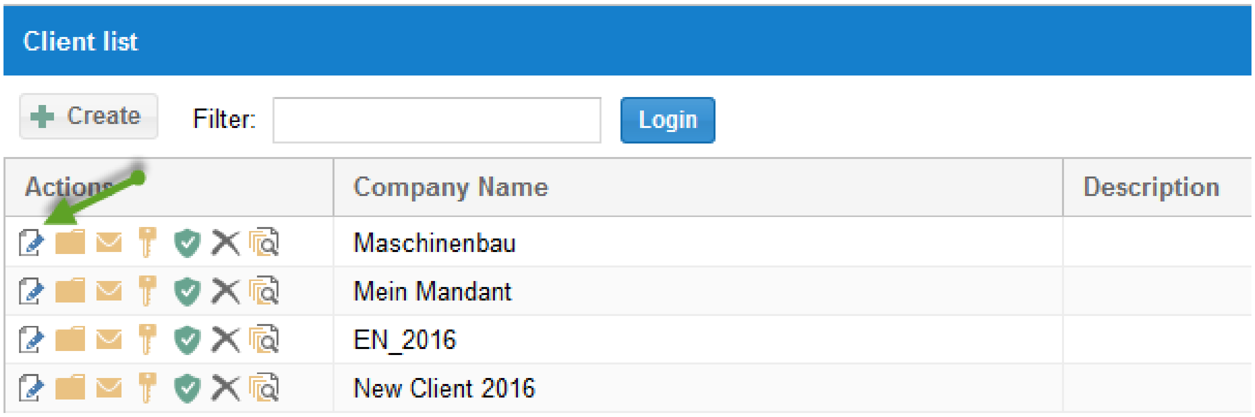
In this way, you can import project time limits to other programs that support .ics file, as e.g. in Google Calendar, MS Outlook, Mozilla Sunbird, Apple iCal, IBM Lotus Notes, etc.

iCalendar module delivers an actual state of scheduled activities each time you access.

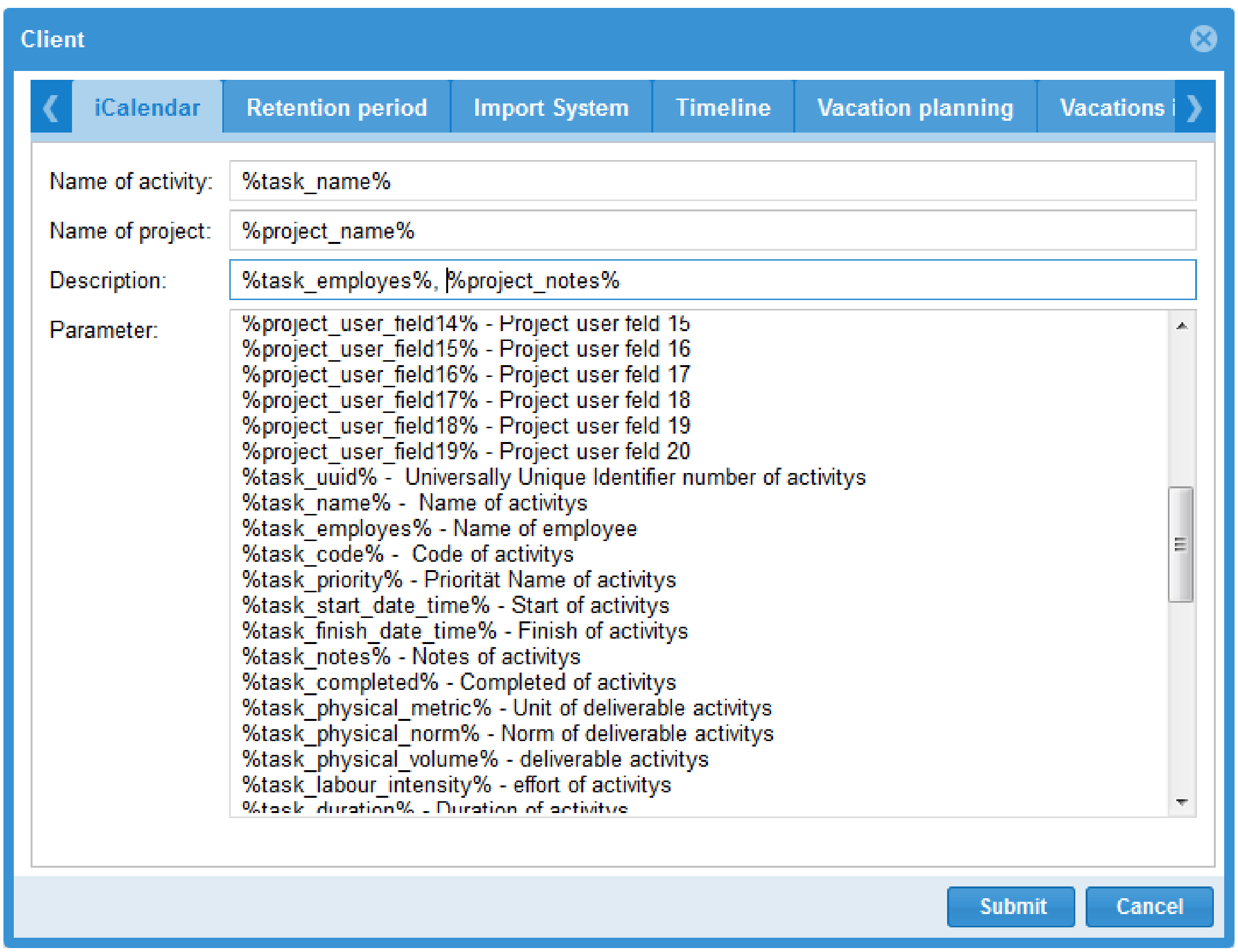
Define Info for iCalendar

The minimum requirement for editing the iCalendar template is that a user has the **client administrator** user role.

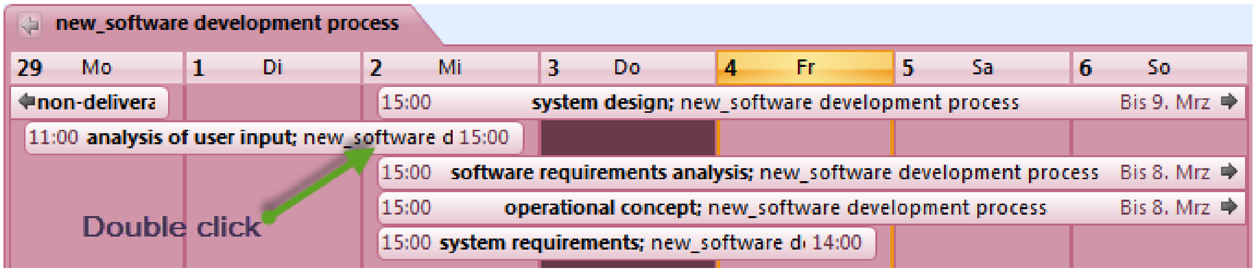
First, click on the following button.



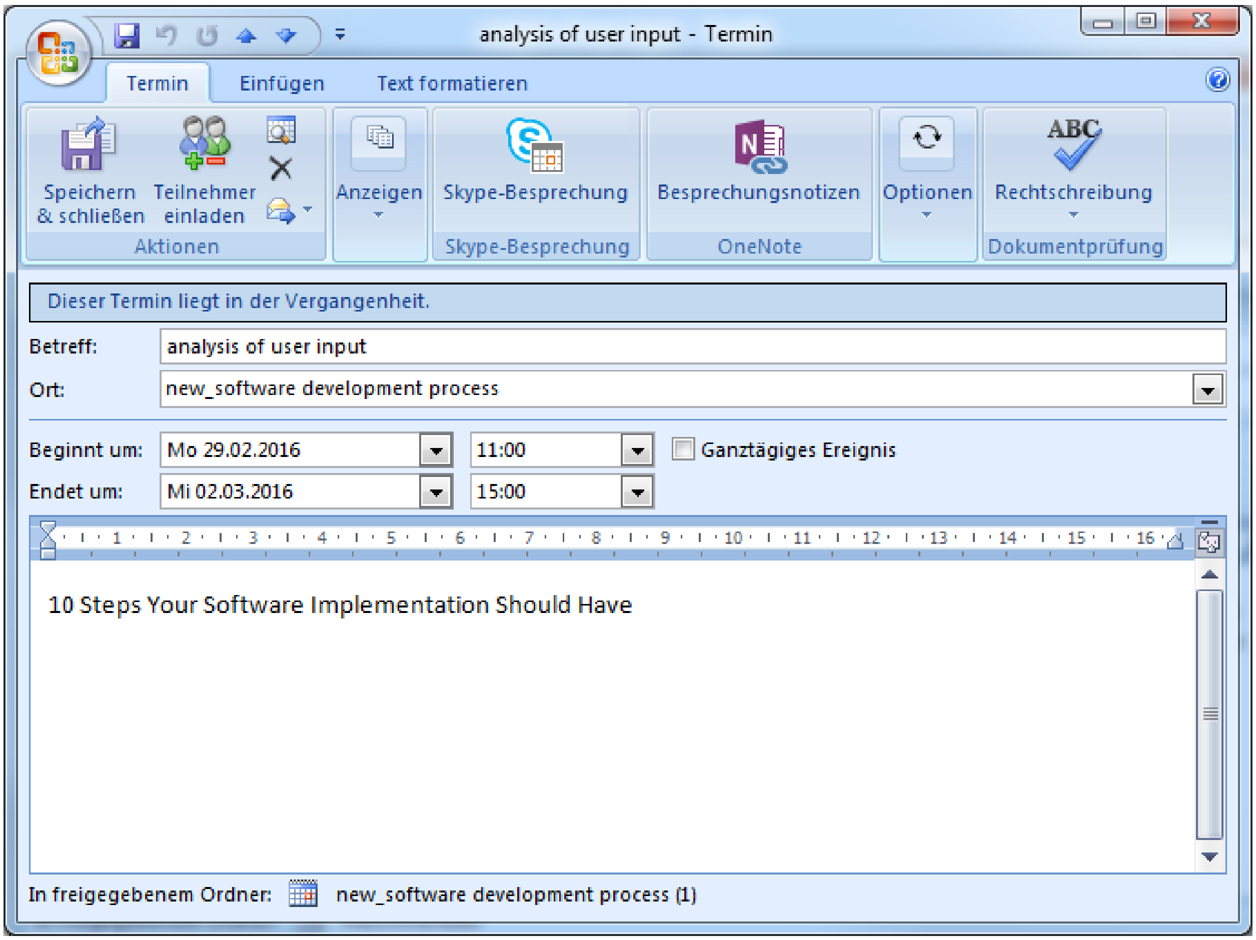
Then set in clients properties, which information should be given to Outlook,



After double-clicking on a date in the Outlook calendar



the following information is displayed.



4.2 E-Mail notification

Module E-mail notification allows you to send e-mails to the persons involved in the project automatically.

Functions

- Remind employees about **The upcoming activities**
- Remind employees about **The 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**

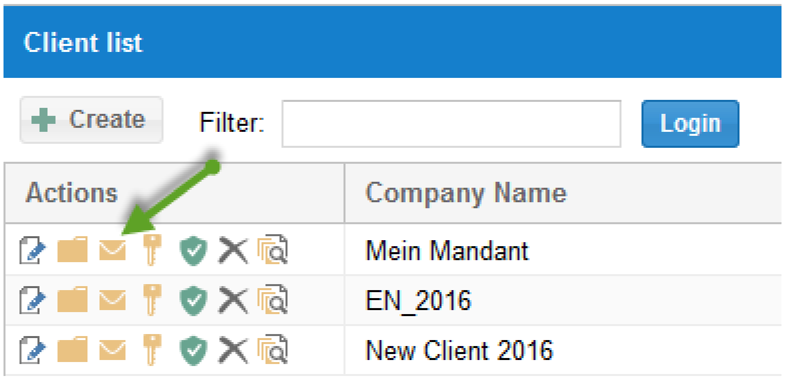
Access rights

To be able to edit the **email templates**, a user should have the **client administrator** user role.

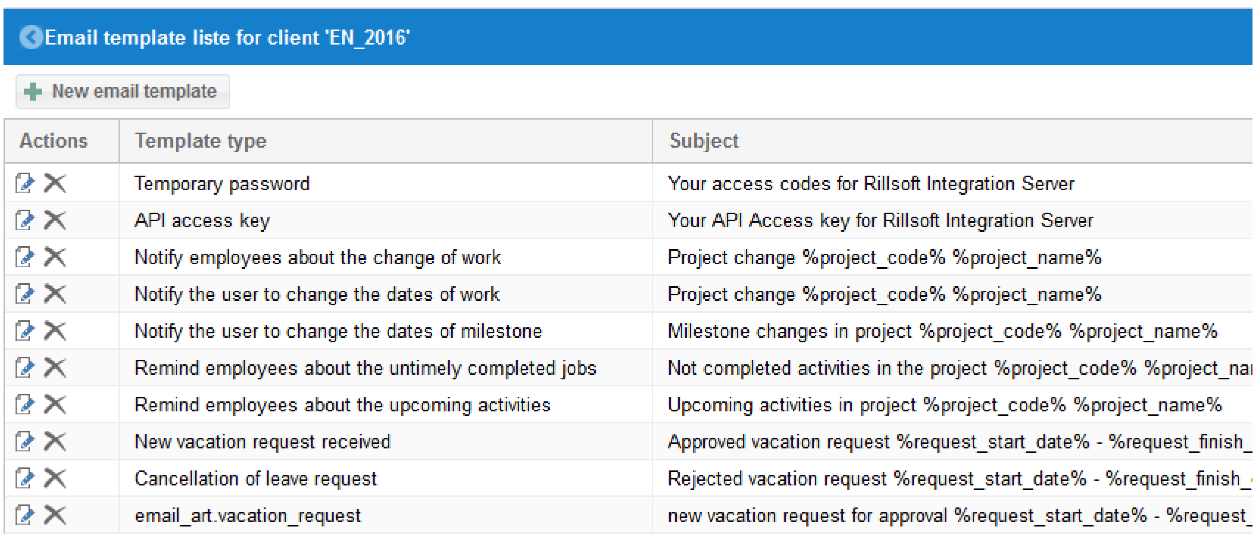
To set the **deadlines for automatic email dispatch**, a user should have the **root folder administrator** folder role.

Check or change e-mail templates

First, click on the **Mail** button.



Here you can check existing e-mail templates or change and create new.

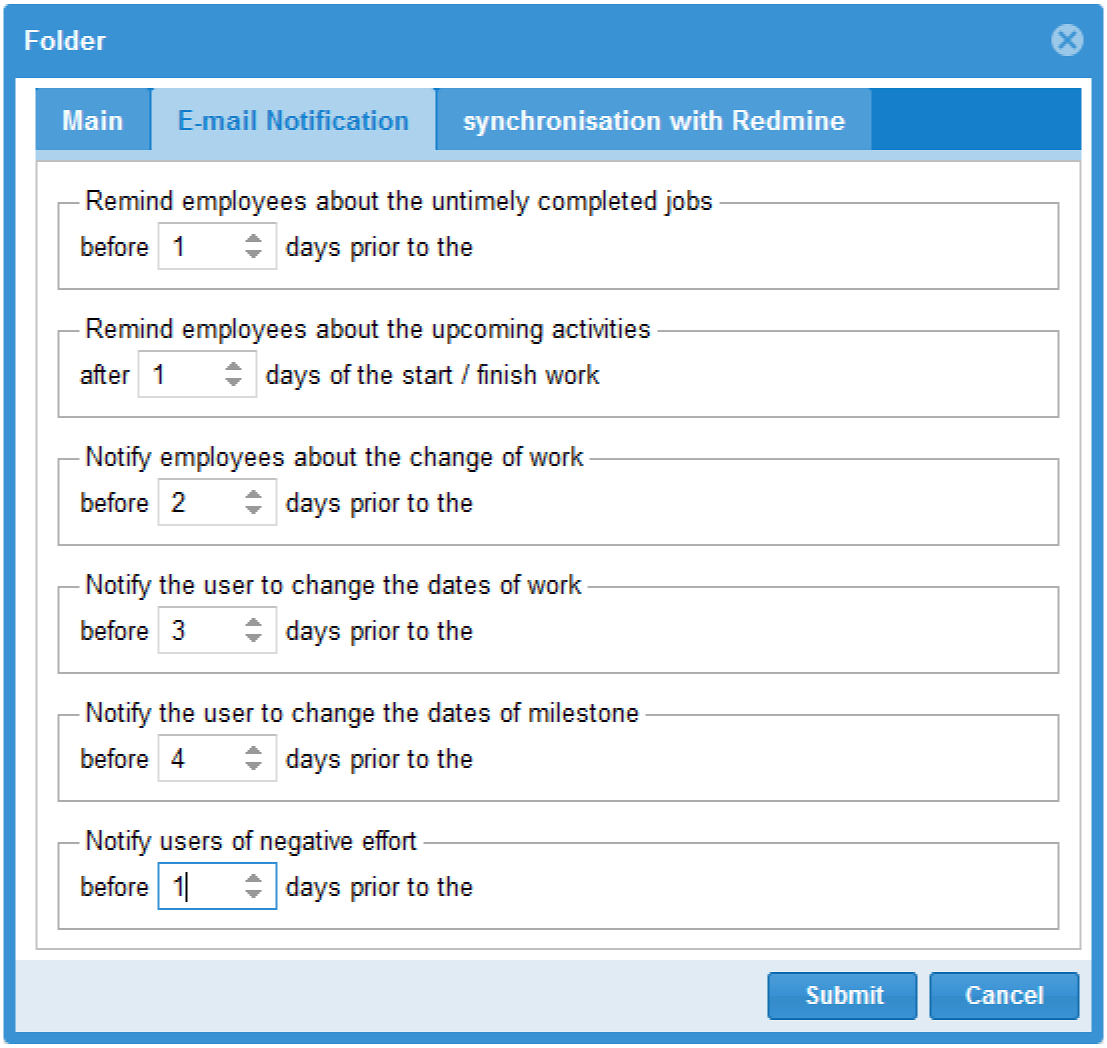


Tip!

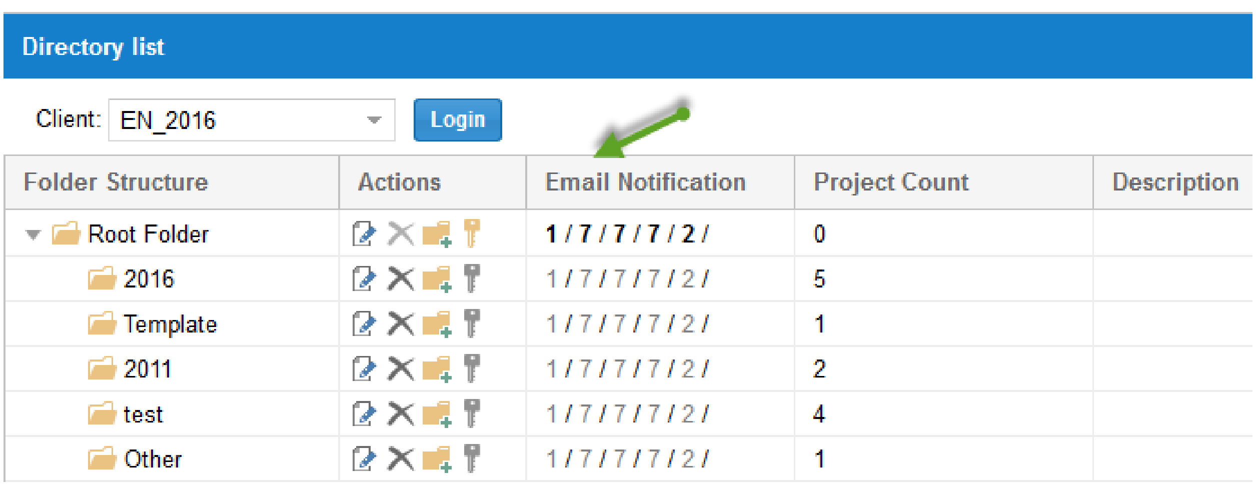
1. Depending on the type of e-mail template different project information in the field parameters is available.
2. In all templates subject and text content are free definable from corresponding parameters available per template.

Time limits for e-mail notification

1. First, click on **Administration > Folders**.
2. In the column **Actions** click on the button **Note with a pen**.
3. Then select the tab **E-mail notification** and set a period of time for activities.



The column **E-mail notification** displays all periods.



Remind employees about **The untimely completed jobs**, that must have been completed X days ago.

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

- the activity start lies within the time gap between the current date minus X (e.g. 2) days and the percentage completion for this activity is equal to 0.

- the activity end lies within the time gap between the current date minus X (e.g. 2) days and the percentage completion for this activity is less than 100.

Remind employees about **The upcoming activities**,that must be completed X days in advance. If the option is on, the employees,who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 3) days, will be warned by e-mail. For instance, today is the 15th of July and 3 days are entered, then the period is from 15.07 to 18.07.

Notify employees about **The change of work**, that must be completed X days in advance. If the options are on, the employees, who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 1) days,will be warned by e-mail and the time limits will be shifted.

Notify users about **The change of work**, that must be completed X days in advance. If the option is on, the employees,who have subordinate employees and who have been assigned to the activities, which lie within the time gap between the current date plus X (e.g. 7)will be warned by e-mail and the time limits will be shifted. You can define subordinate employees by clicking on the menu item **Administration/User**,column **Actions**, button . The field **Filter** should be empty.

Notify users about **The change of milestone dates**, that must be completed X days in advance If the option is on, the users will be notified by e-mail, in case of milestone dates shifts.

Caution!

The first e-mail notification lists all activities from the project start up e.g. 17.07. Then new activities will be added which means that if the information, e.g. a1, related to a certain activity has been already sent, the employees will not get e-mails about this activity that lies in the mentioned time gaps.

Note: You can automate an e-mail notification by creating a scheduled task in Start / Control Panel / Administration / Scheduling.

4.3 Vacation planning

Vacation planning module allows an optimal managing of holidays and absence of employees.

Functions

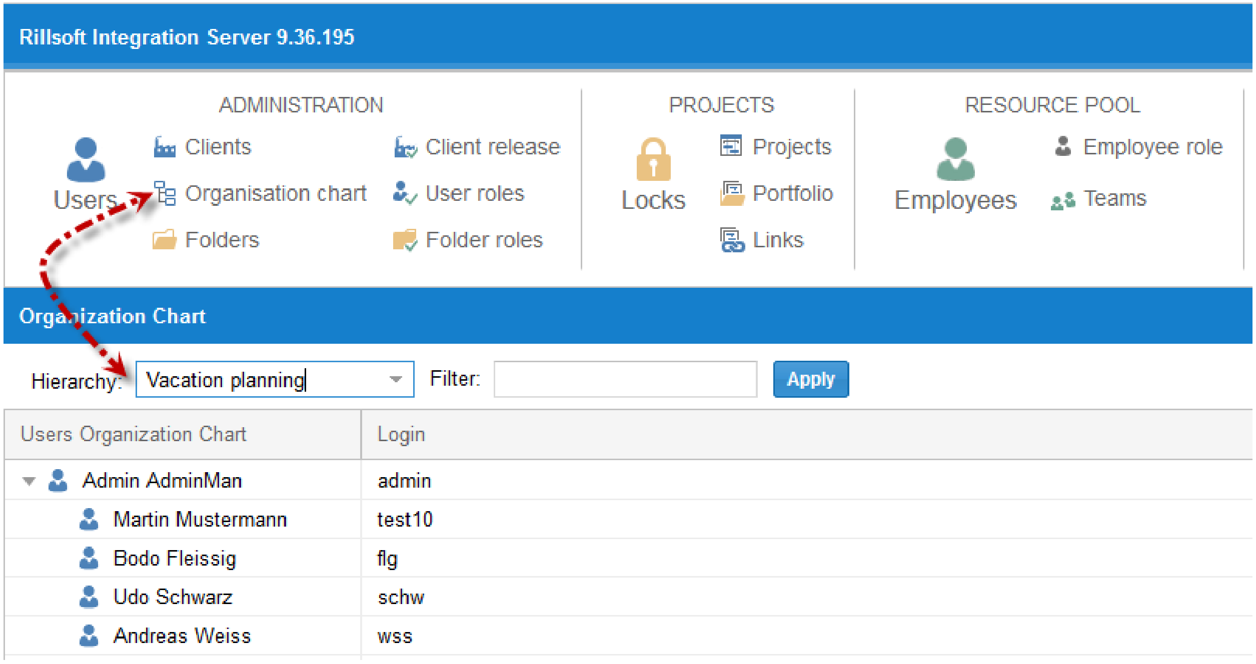
- Enter the preferred vacation dates of employees via the web interface.
- Check if there is an overlap between the in the request set vacation days and scheduled activities.
- Approval of registered vacation dates (based on the Vacation planning organization chart).
- Flexible summary of the absence of all team members.
- Import of vacation days from other applications.

Access rights

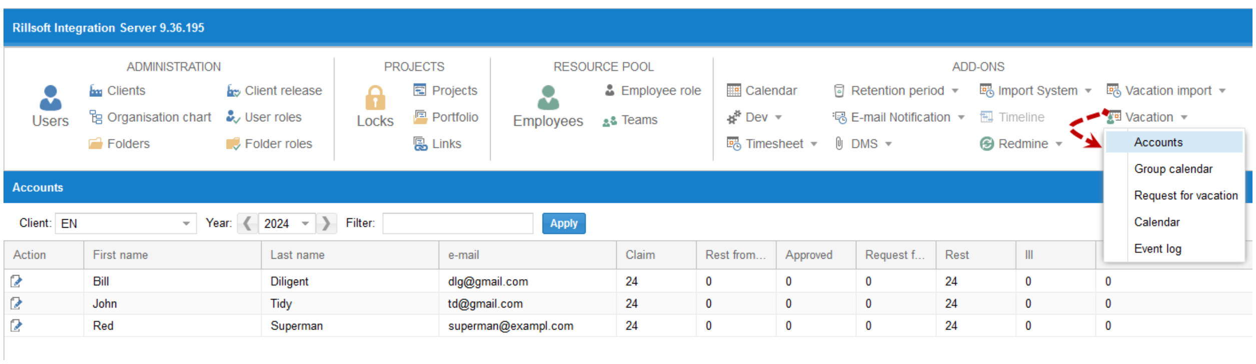
In order to **submit vacation requests** and **monitor vacation calendars and accounts**, a user should have the **Leave planning user** user role.

However, if a user has the **Leave Planning Supervisor** user role, they may also view the information for subordinate users,

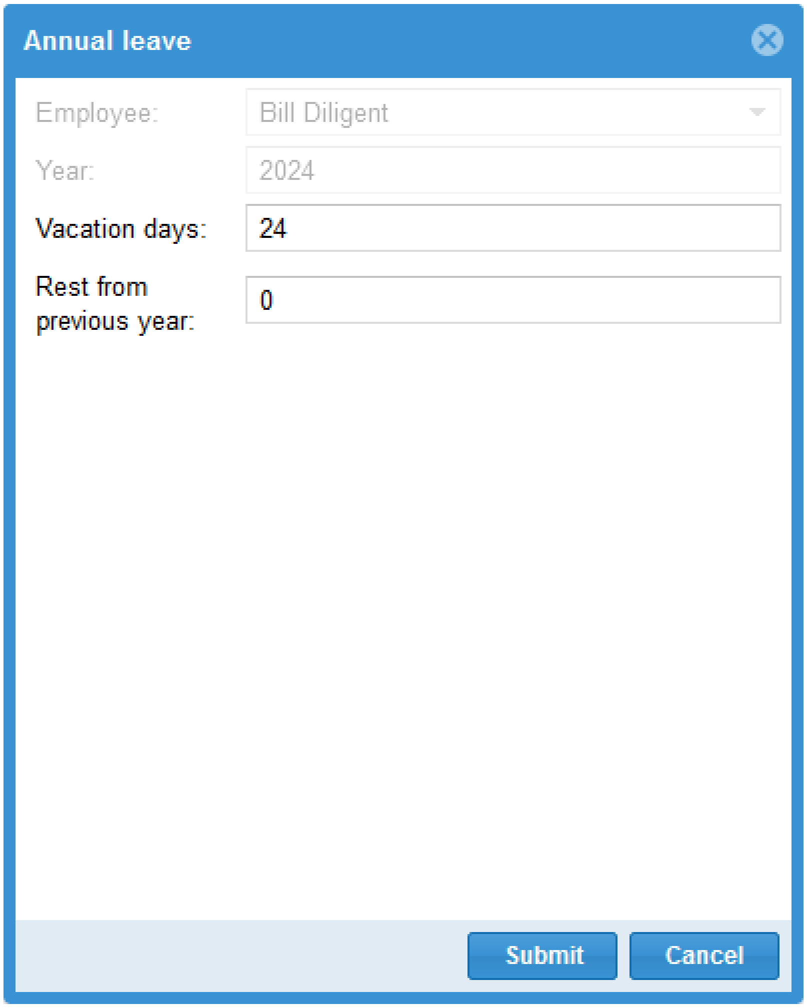
related to the vacation planning organizational chart.



Accounts

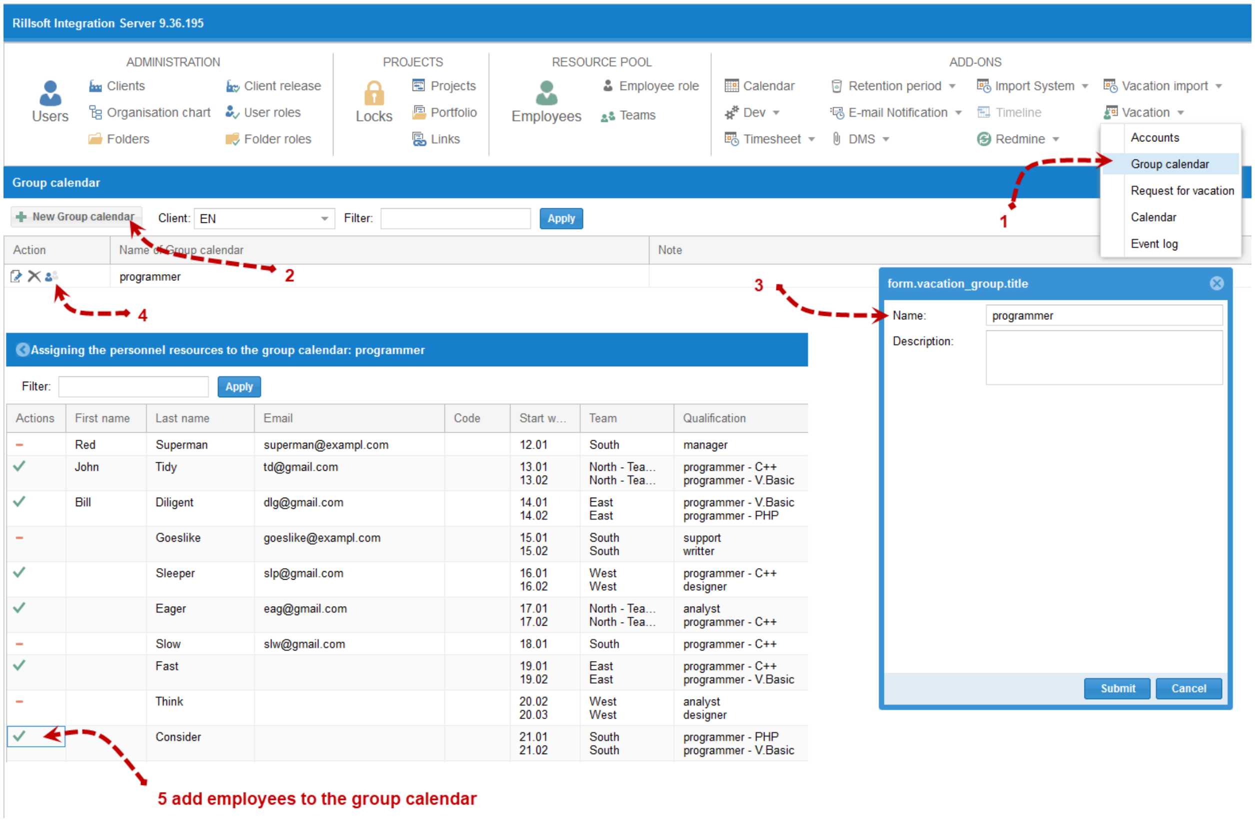


You can edit the number of vacation days and rest from the previous year.



Group calendar

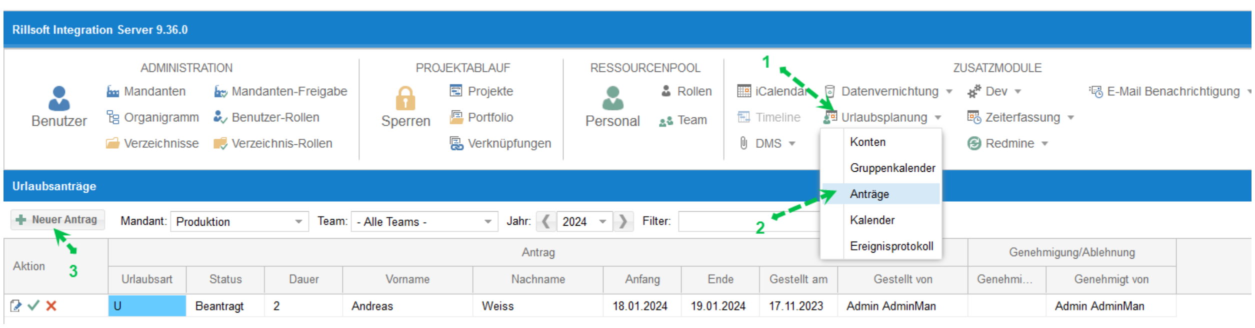
You can create group calendars to give team members a way to take into account the vacation plans of other teammates.



An employee can belong to several groups at the same time.

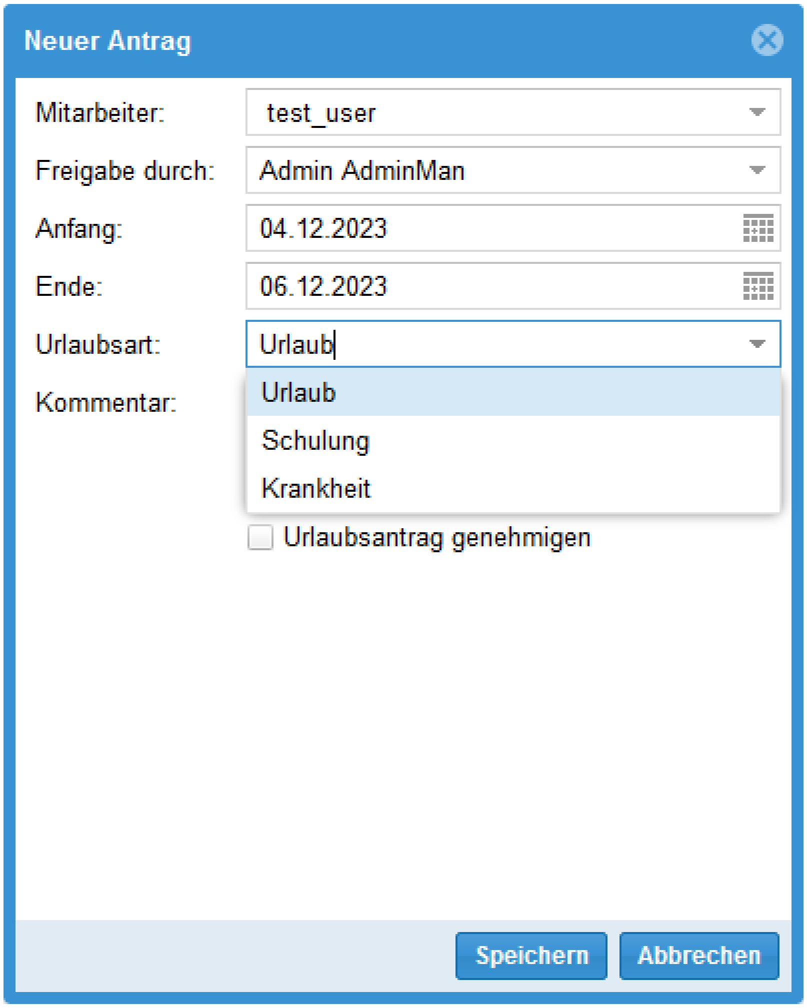
Applications

You can submit a new vacation request using the **Create** button.

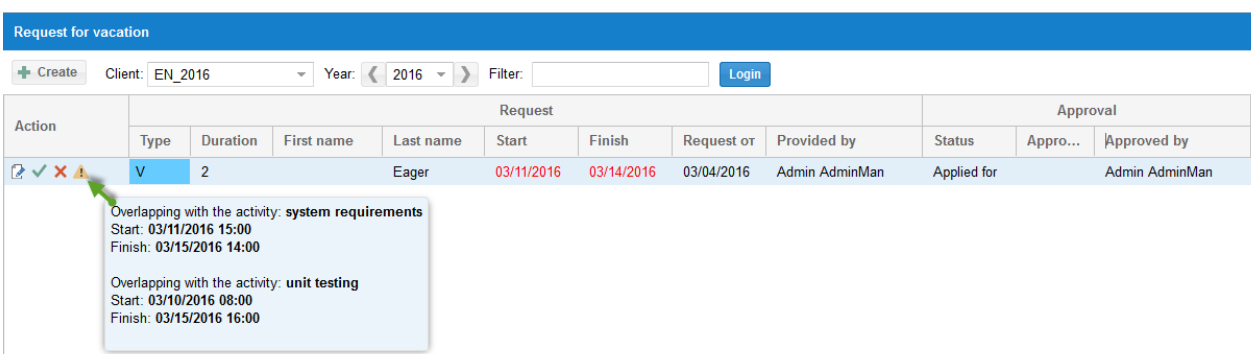


In the **New request** dialog window, you can enter the following information:

- select an employee from the list
- the start and end date of the leave
- the type of leave
- a comment

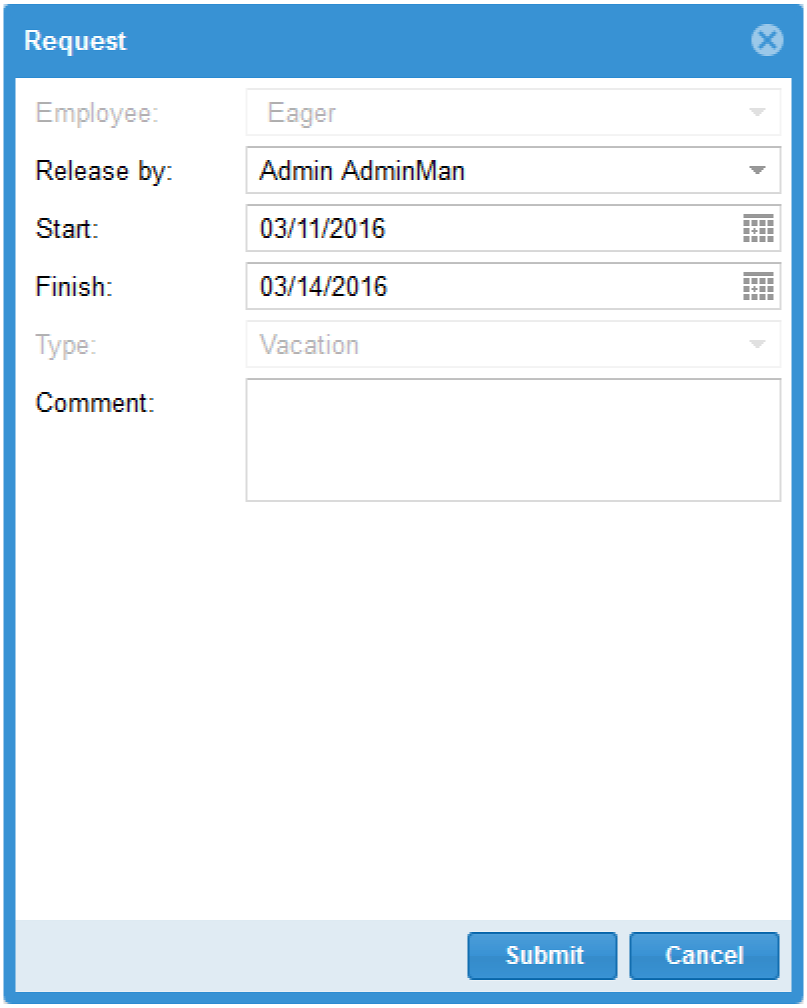


If you have the user role **Leave manager**, you can approve a leave request that has just been entered.

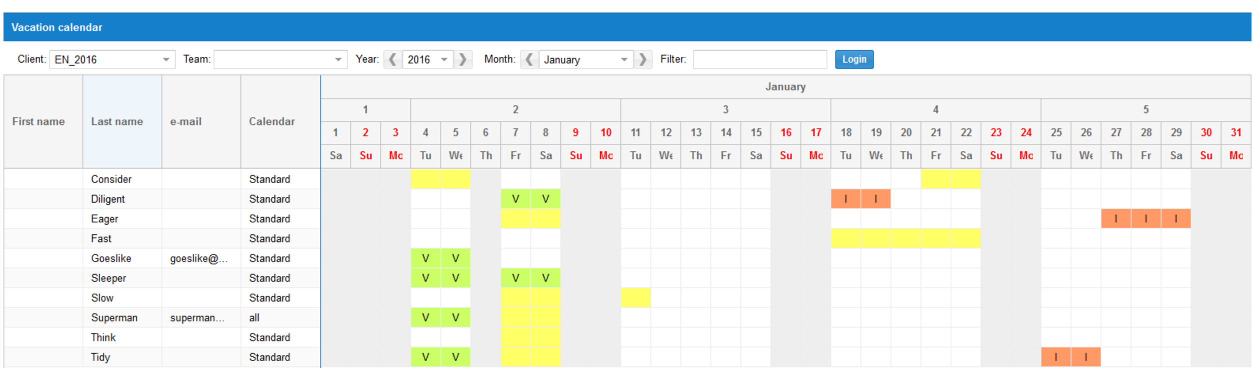


You can edit, delete and accept requests.

If there is an overlap between vacation days and scheduled activities, the sign  appears in the column **Actions**.



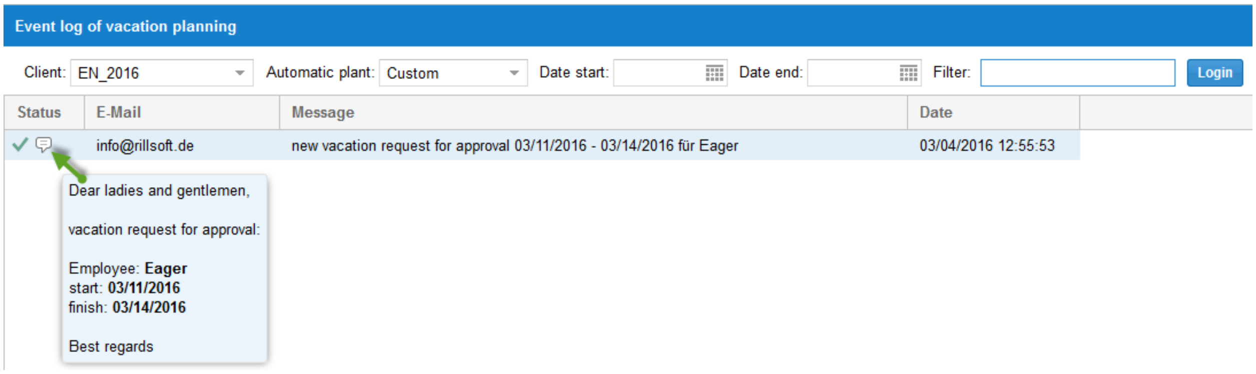
Calendar



If the non-working days are marked with an underscore 

or , then they have been taken from the resource pool in the Rillsoft Project.

Event log

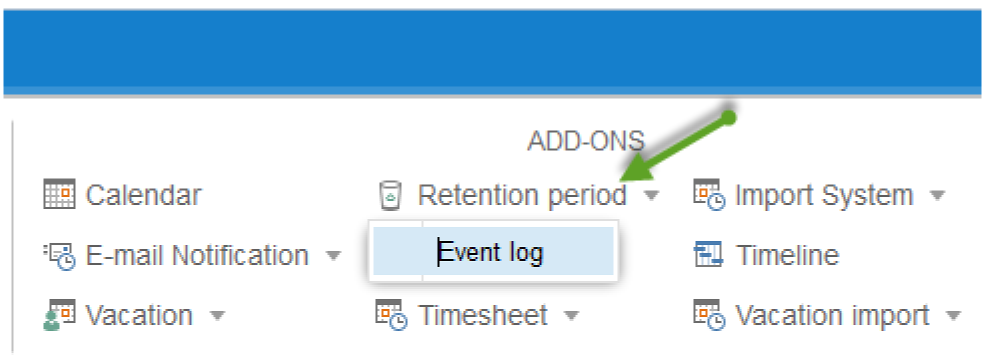


4.4 Retention period

If you delete your projects for the first time, they are not actually removed from the database, but marked only as deleted. This feature ensures that these projects can be restored, if necessary, if they have been deleted accidentally.

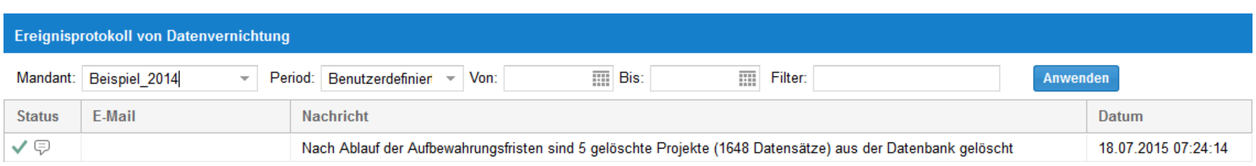
Retention period module allows you to delete the projects marked for deletion and old resource pool revisions from the database permanently.

First, click on the button **Retention period**



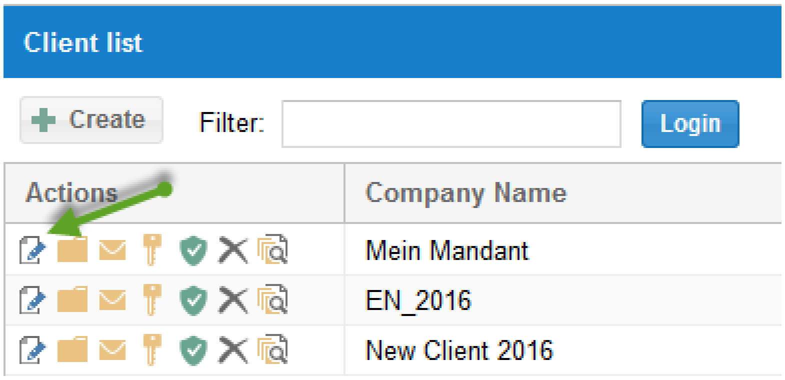
Event log

After clicking on **Event Log** you can find out whether the data have been permanently deleted from the database.

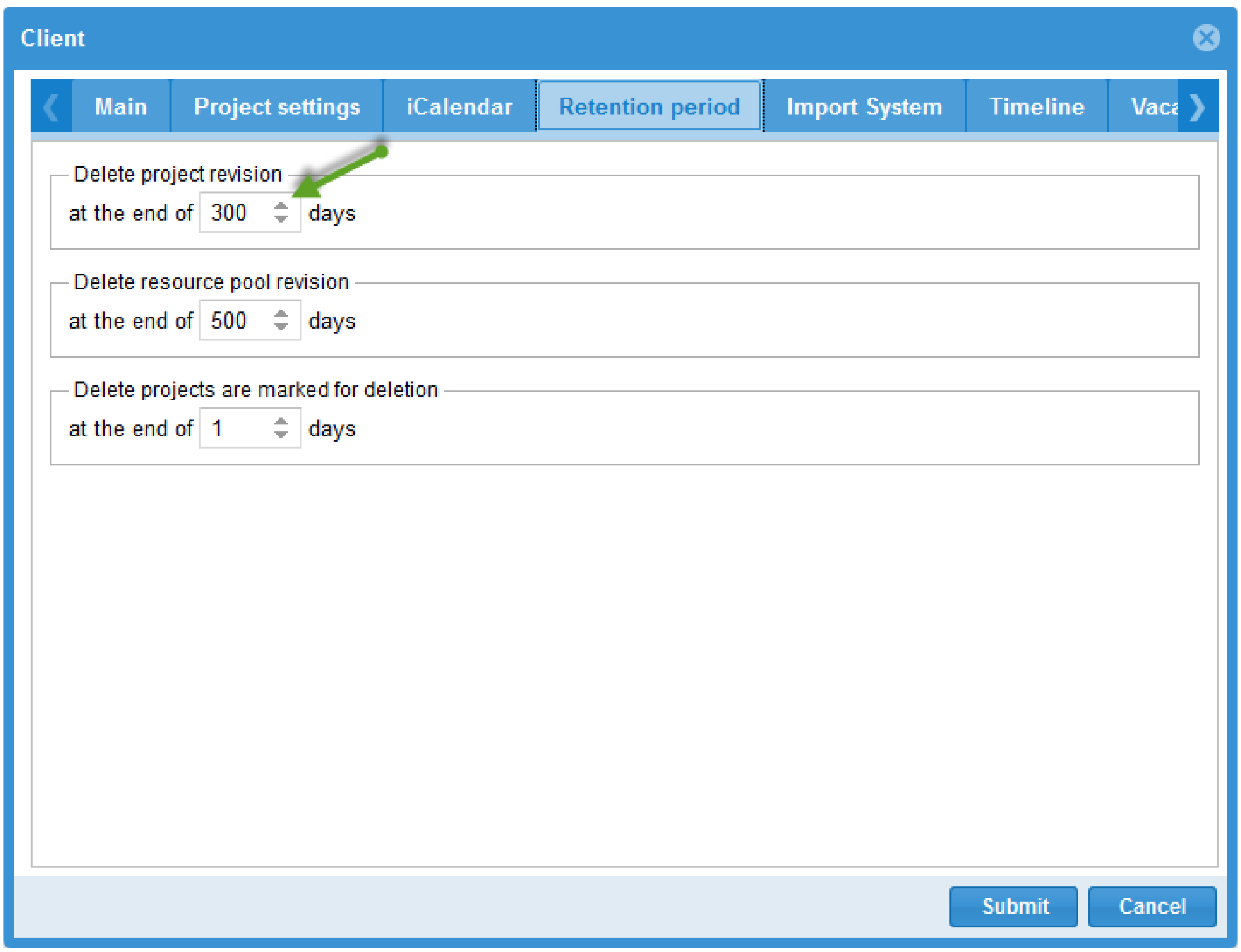


Requirements

In client properties



in the tab **Retention periods** you should determine when projects, project revisions and resource pool revisions marked for deletion,must be permanently deleted.



Note

- A folder is only then permanently deleted when all the projects located in the folder are 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 retention period process by creating a scheduled task in Start / Control Panel / Administration

/ Scheduling.

4.5 Timesheet

Timesheet module allows to enter the project members' working time in a project.

Functions

- Timesheet which is bound to scheduled tasks and residual expenses definition.
- Approval of entered working times and residual expenses considering the organization chart timesheet.
- Date and project adjustments after the takeover of approved dates and residual expenses.

Access rights

In order to **capture timesheet**, a user should have the following access rights:

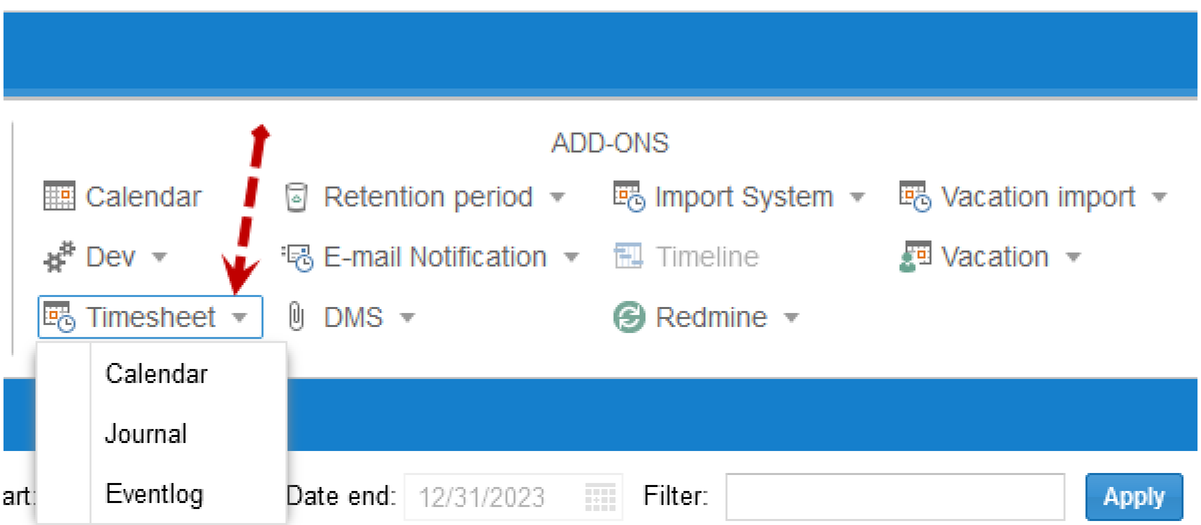
- the user role **Project user**, this allows a user to read the portfolios and a resource pool
- the **Root folder user** directory role, which allows a user to read projects and enter feedback

To **accept timesheet**, a user should have the following access rights:

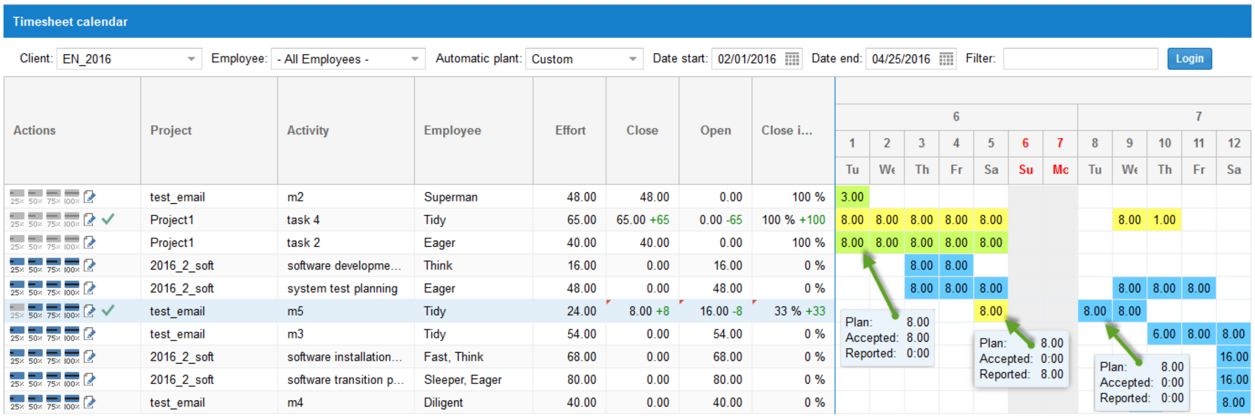
- the directory role **Root folder administrator**
- a user role **Project user** or **Project manager**

The root directory administrator access role also includes functions such as **Read projects** and **Accept timesheet**.

First, click on the button **Timesheet** and choose the menu item **Calendar**.



You can display scheduled, reported and accepted working hours of employees in a calendar bar. Time and resource filters are available.



Accepted timesheets are displayed in green color.

Registered but not yet accepted timesheets are shown in yellow.

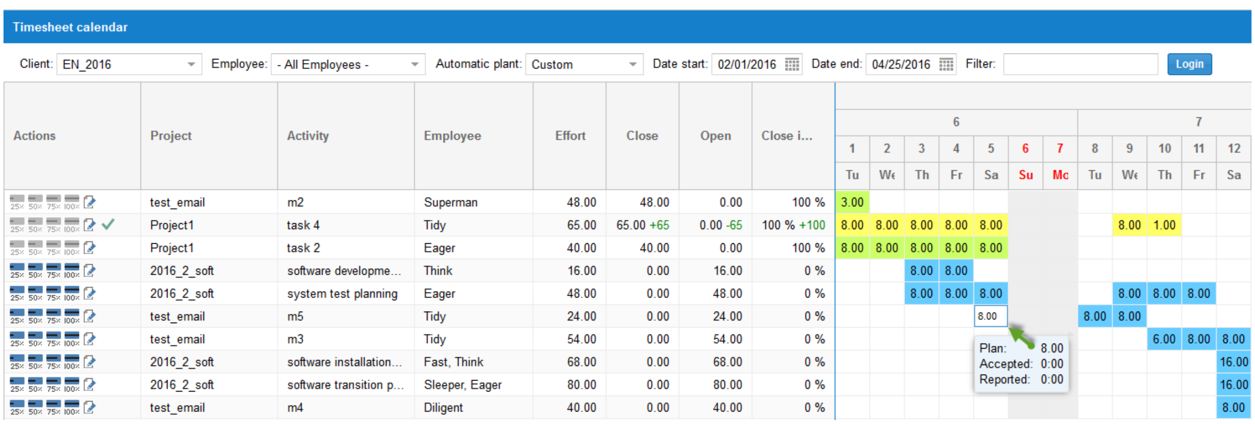
Scheduled working times are represented in blue.

Enter worked hours

- directly in the calendar
- quickly by a predefined percentage in the column Actions
- in an input form with more information

Enter worked hours directly in the calendar

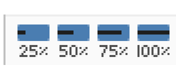
Click on the cell in the calendar where you want enter the timesheet.



Enter the corresponding number.

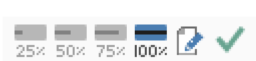
Enter worked hours by a predefined percentage

If you want to enter a predefined percentage quickly, click on the icon buttons in the column Actions.

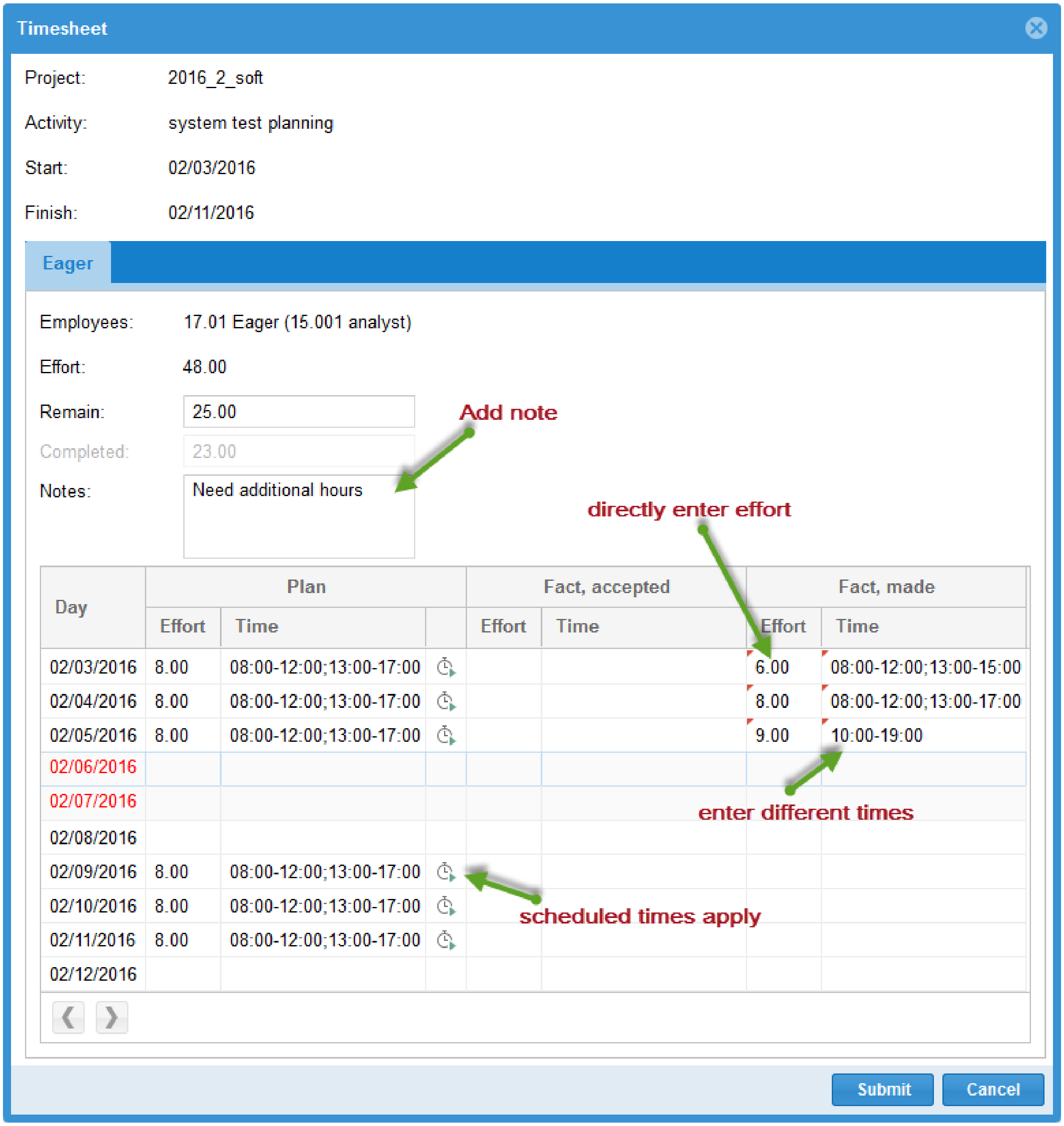


Enter worked hours in an input form

If you want to enter not only worked hours but also notes or working hours that are different from the scheduled, you can click on the button **Note with a pen**.



Flexible entering options are available in the input form.



The green tick in the Action column indicates that the reported hours have been already approved or are still to be accepted.

4.6 Data Management System (DMS)

Module Data Management System (DMS) allows you to manage project documents.

Features

- Documents can be stored in the predefined folder structure along with a project, subproject, and task
- All documents are stored audit proof
- All document revisions can be retrieved and restored

Access rights

Minimum access rights to **read** project documents:

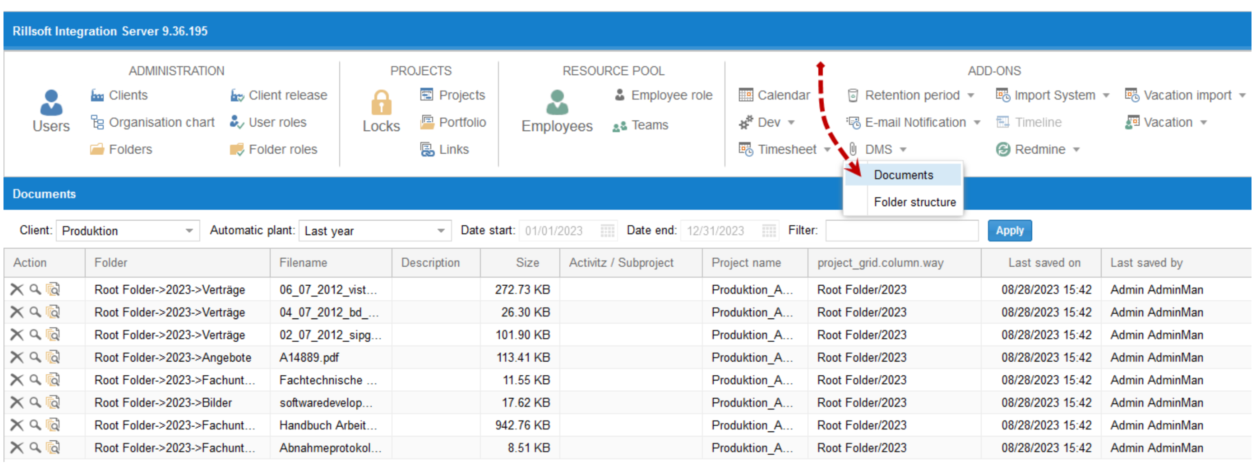
- User roles
  - Read documents
  - Read resource pool
- Folder Role
  - Read project

The following access rights can be assigned to users as required:

- User roles
  - Create documents
  - Change documents
  - Delete documents
  - Restore documents
  - Manage folder structure

Documents

First, choose **Add ons > DMS > Documents**.



Here all documents assigned to the projects or their activities are listed.

In the column **Action** you can:

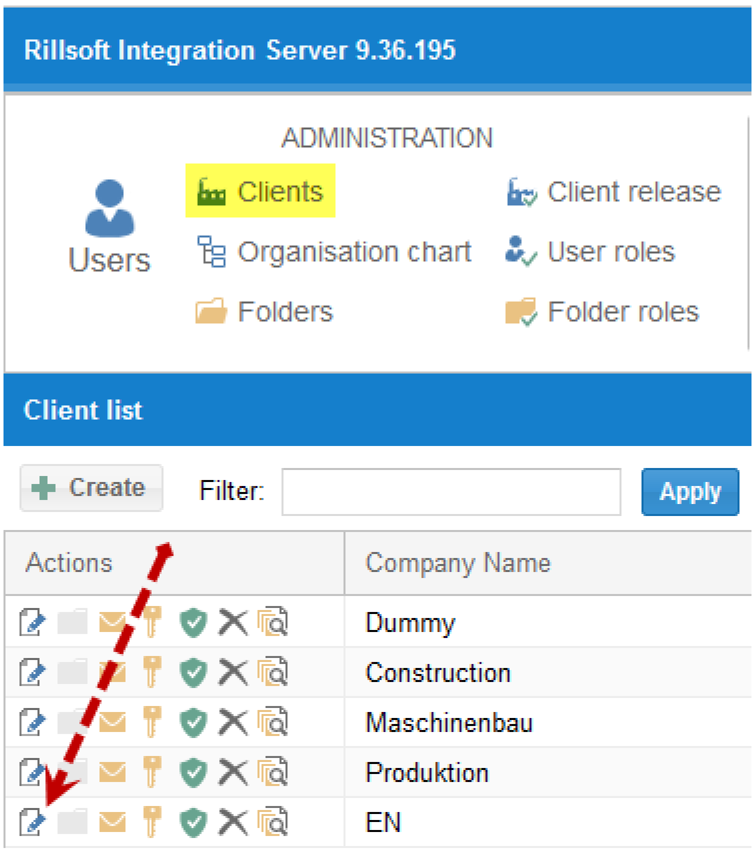
- Documents delete.

- Documents can be displayed
- Track versioning of a document
- restore deleted documents

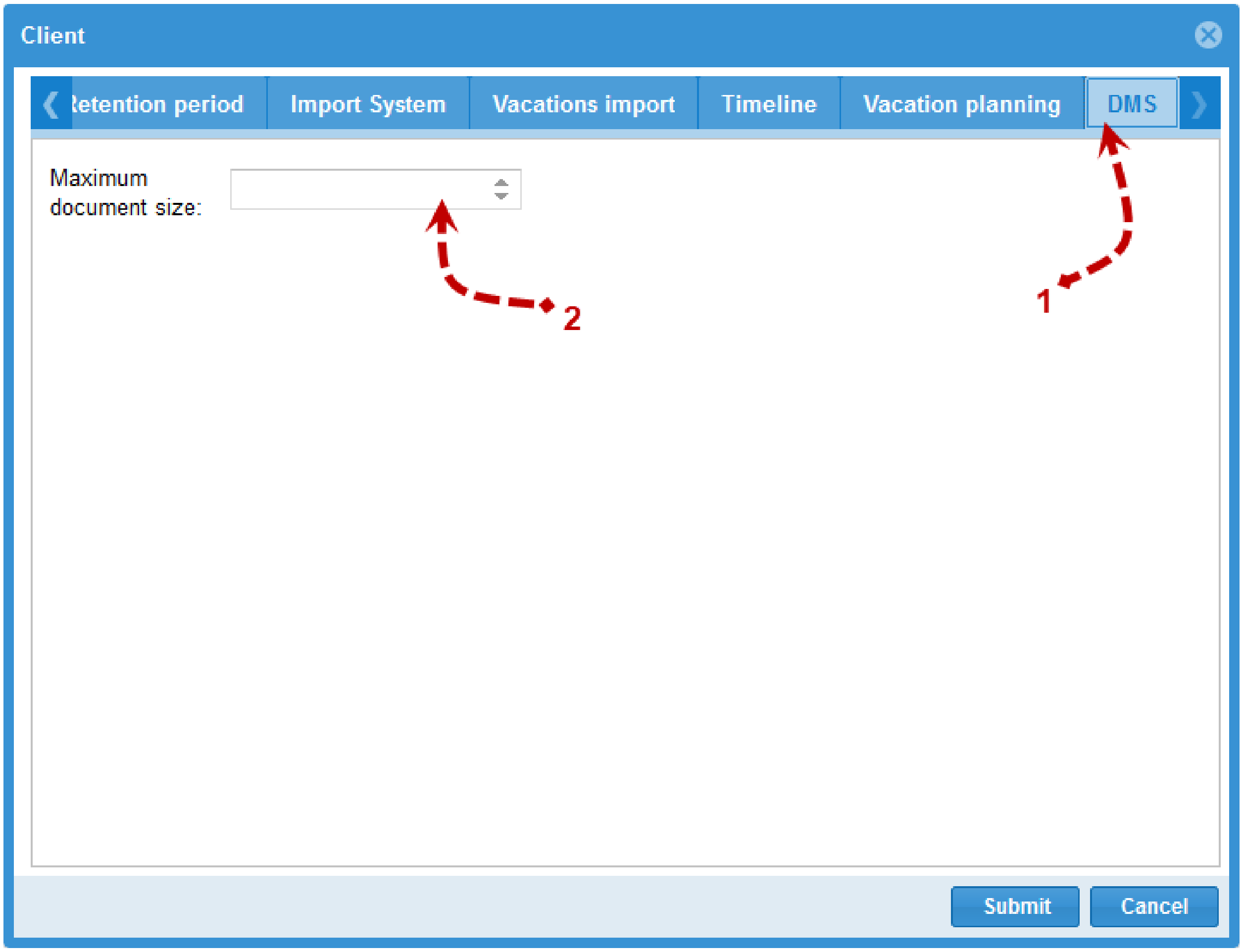
Note

- When deleting a project, associated documents are also deleted. When restoring from the project, its documents are also restored.
- Deleted documents are permanently deleted from the data bank after expiration of the retention period.

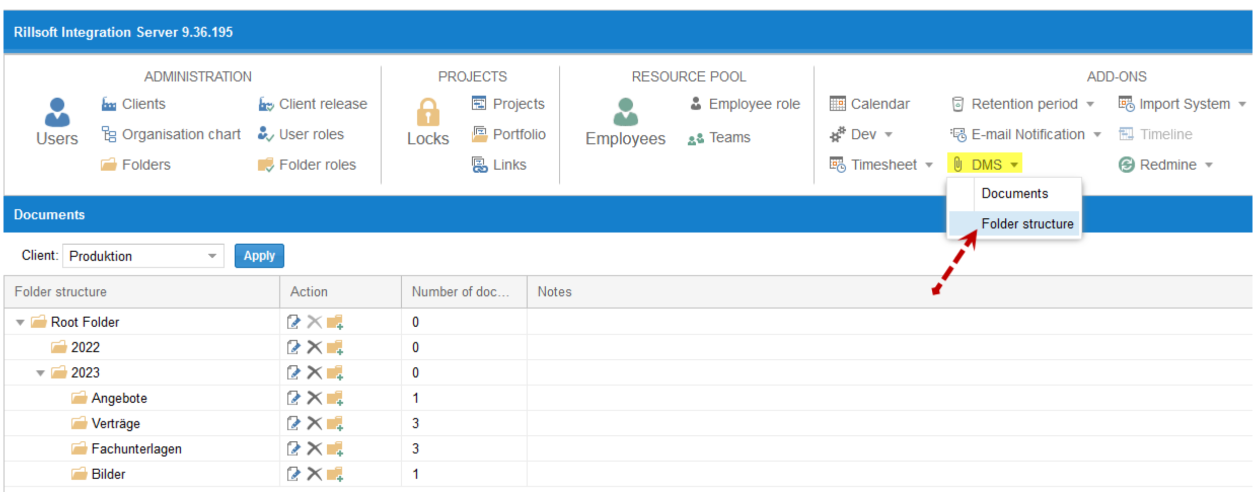
You can limit the size of inserted documents by client properties, if you click **Administration > Clients > Edit**



and then enter the big one.



Folder structure



You can freely define folder structure.

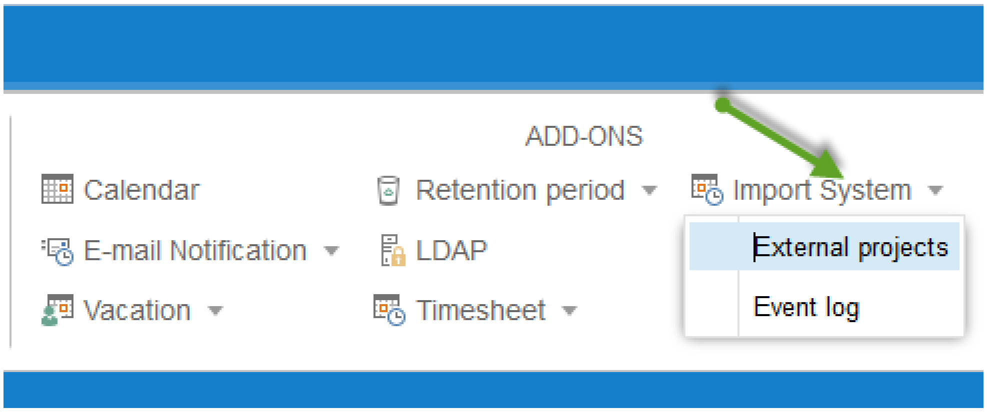
Note

- Document folder structure is managed in Rillsoft Integration Server for entire clients and applies to all projects of the client.
- When deleting a DMS folder, its documents are moved to the main folder.

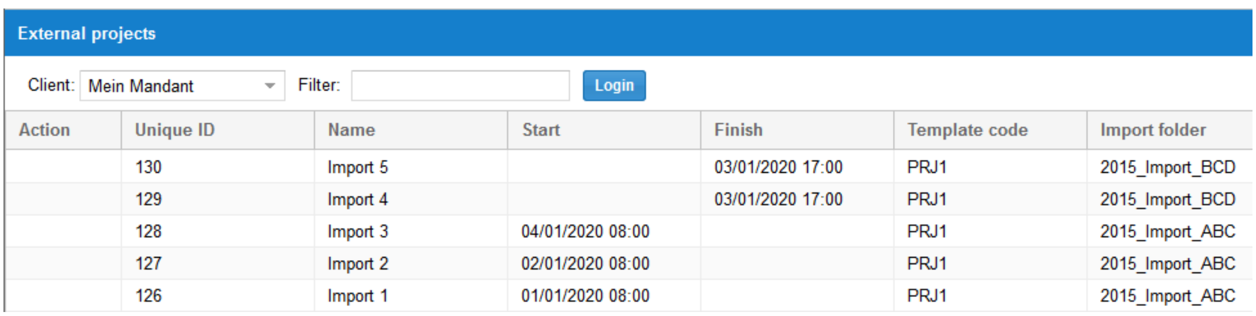
4.7 Project Import

Project import module allows you to take the project data from other systems in Rillsoft project and to create new projects automatically in this way.

First, click on the button **Project Import**.



Then select the menu item **External projects**. You will get all projects ready to 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

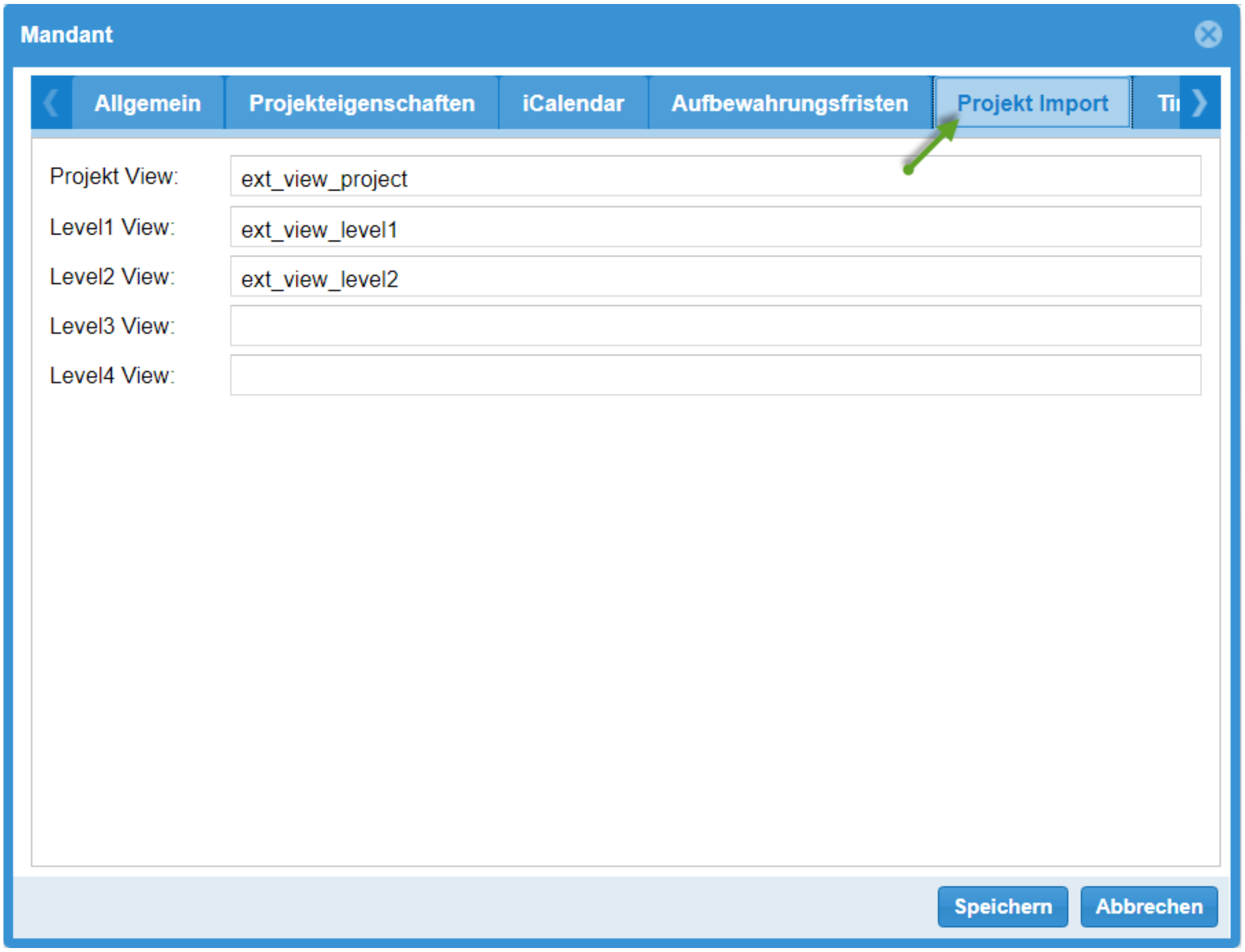
Requirements

- imported projects should be entered in the database.
- corresponding templates should be created in Rillsoft project.

Structure depth

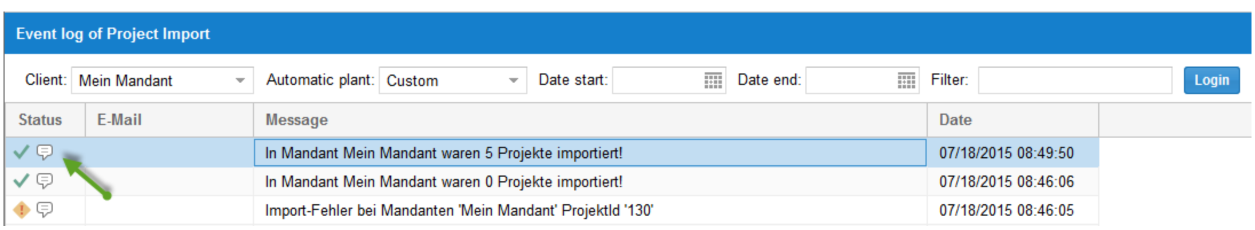
You can configure the outline depth in the client properties by

first clicking **Administration > Clients > Edit**.



Event log

After clicking on **Event Log** you can find out whether your import has been successfully completed.



Note: You can automate import process by creating a scheduled task in Start / Control Panel / Administration / Scheduling.

4.8 Timeline

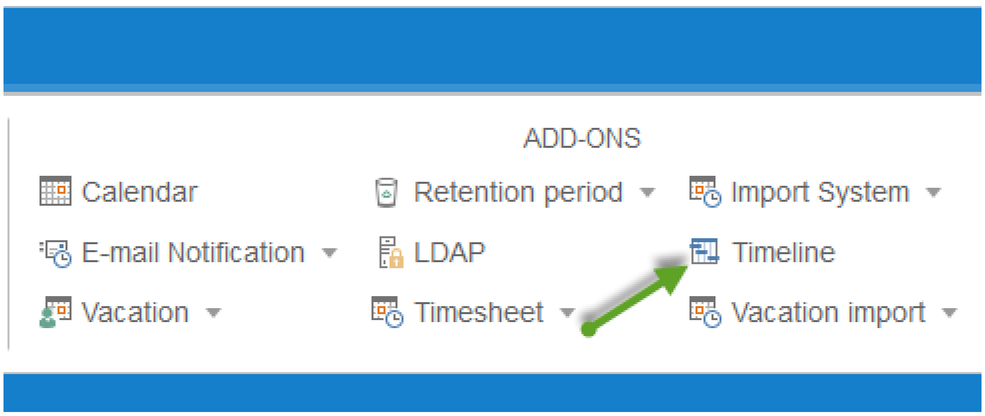
The module provides the activities in the time scale in the Internet browser window.

Timeline module displays a current status of scheduled activities each time you access.

Functions

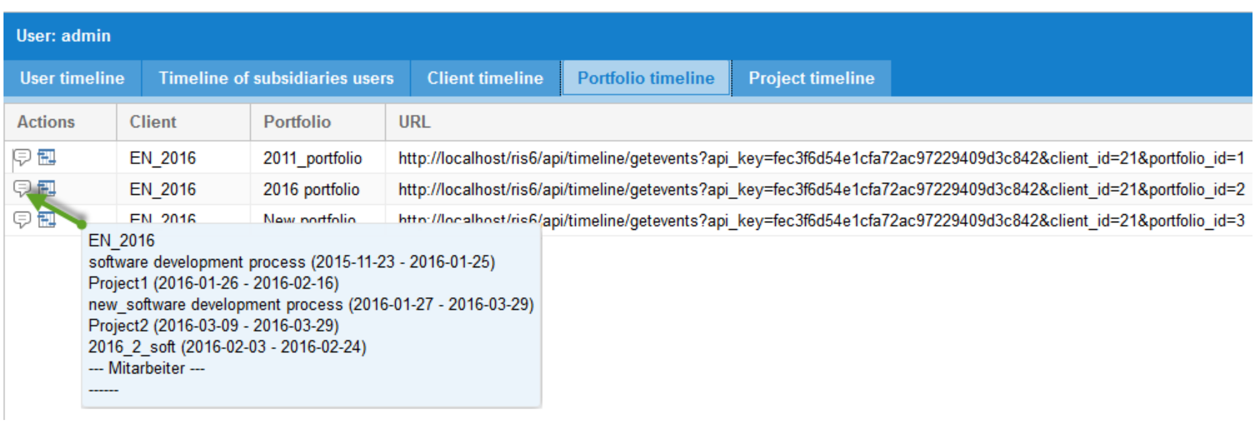
- User timeline displays all the user activities cross-project per client.
- Subordinate users' timeline shows all activities of the subordinate user (based on Administration-Organization chart) cross-project per clients.
- Clients timeline provides all client's activities in all projects.
- Portfolio timeline includes all activities of a project portfolio.
- Project timeline provides all activities of a project.

First, click on the button **Timeline**.



As described in functions 5 different types of timeline are available.

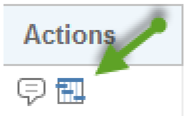
After clicking on one of the tab, you can view the time list.



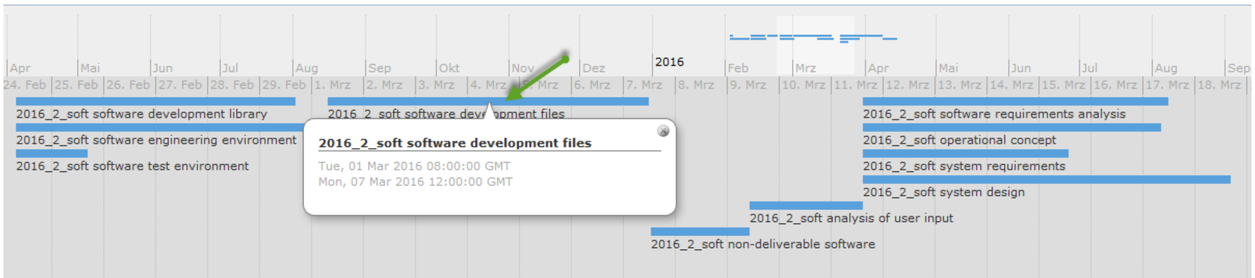
If you move the mouse over speech bubble, you can notice the information about projects and employees.

Timeline in Internet browser window

Click on the button **Timeline** in the column Actions



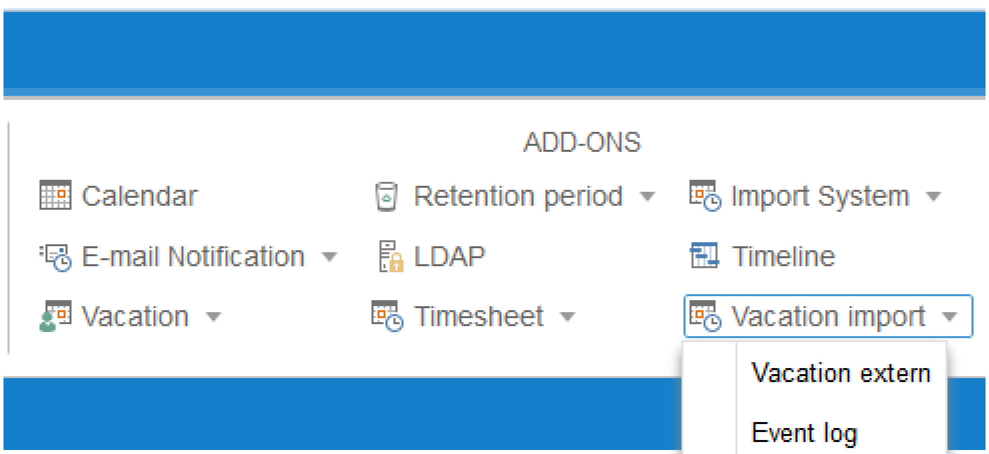
to get the project information in the form of timeline.



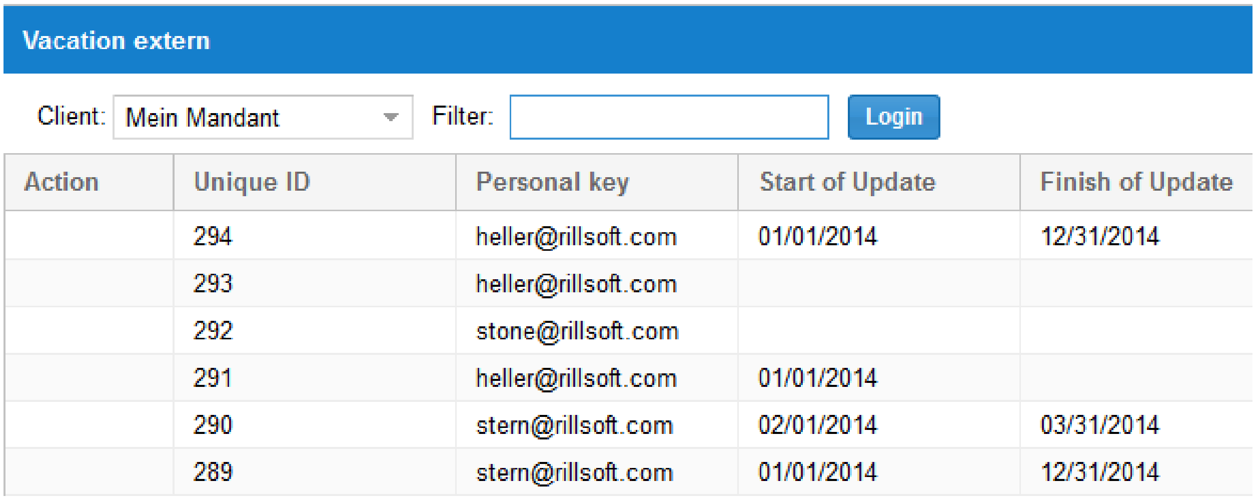
4.9 Vacation import

Vacation import module allows you to take nonworking time from other systems in Rillsoft project and to enter vacation and sickness days in resource pool automatically.

First, click on the button **Vacation import**.



Then select the menu item **Vacation extern**. You get all projects ready to import from your external system.



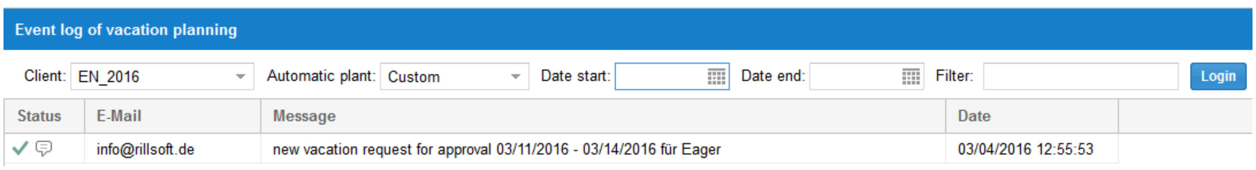
Action	Unique ID	Personal key	Start of Update	Finish of Update
	294	heller@rillsoft.com	01/01/2014	12/31/2014
	293	heller@rillsoft.com		
	292	stone@rillsoft.com		
	291	heller@rillsoft.com	01/01/2014	
	290	stern@rillsoft.com	02/01/2014	03/31/2014
	289	stern@rillsoft.com	01/01/2014	12/31/2014

Requirements

- the employees will be identified by your email address.

Event log

After clicking on **Event Log** you can find out whether your import has been successfully completed.



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 import process by creating a scheduled task in start/Control Panel/Administration/Scheduling

CHAPTER

FIVE

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