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# **Rillsoft Integration Server**

*Release 9*

**Rillsoft GmbH**

**Sep 11, 2024**



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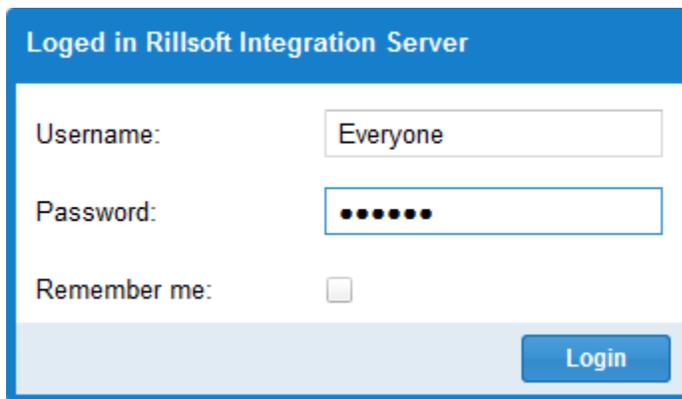
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## ADMINISTRATION

### 1.1 Registration

First, a registration is required.

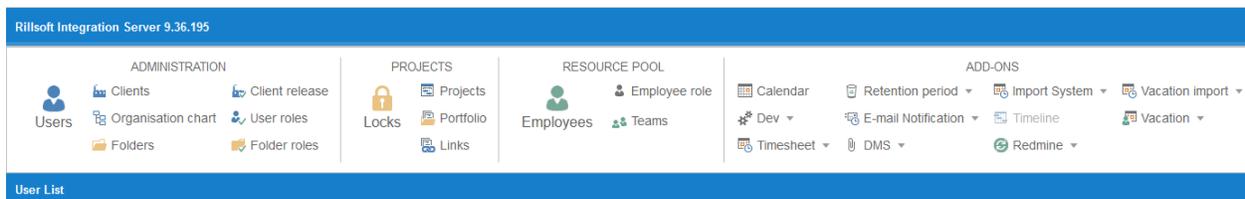


The screenshot shows a login form titled "Logged in Rillsoft Integration Server". It contains three input fields: "Username:" with the value "Everyone", "Password:" with masked characters, and "Remember me:" with an unchecked checkbox. A blue "Login" button is positioned at the bottom right of the form.

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:

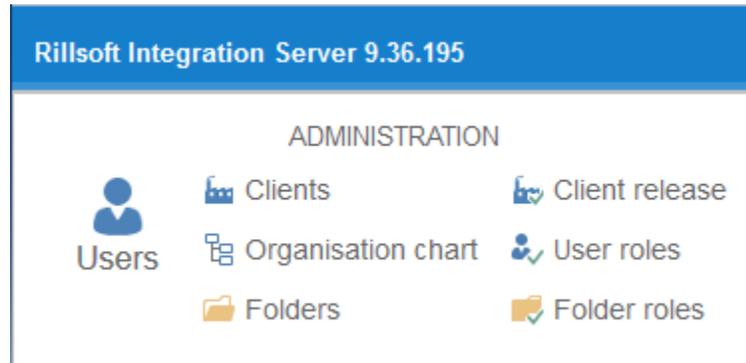


The screenshot displays the main menu of the Rillsoft Integration Server 9.36.195. The menu is organized into four main categories: ADMINISTRATION, PROJECTS, RESOURCE POOL, and ADD-ONS. The ADMINISTRATION section includes Users, Clients, Organisation chart, Folders, Client release, User roles, and Folder roles. The PROJECTS section includes Locks, Projects, Portfolio, and Links. The RESOURCE POOL section includes Employees and Teams. The ADD-ONS section includes Calendar, Dev, Timesheet, Retention period, E-mail Notification, DMS, Import System, Timeline, Redmine, Vacation import, and Vacation. A "User List" link is visible at the bottom left of the menu.

ADMINISTRATION	ADDITIONAL MODULES
<ul style="list-style-type: none"> <li>• Users</li> <li>• Clients</li> <li>• Clients share</li> <li>• Organization chart</li> <li>• User roles</li> <li>• Folders</li> <li>• Folder roles</li> </ul>	<ul style="list-style-type: none"> <li>• iCalendar</li> <li>• E-Mail notification</li> <li>• Vacation planning</li> <li>• Retention period</li> <li>• Projekt import</li> <li>• Timesheet</li> <li>• Vacation import</li> <li>• DMS</li> </ul>
PROJECT SCHEDULING	RESOURCEPOOL
<ul style="list-style-type: none"> <li>• Lock</li> <li>• Projects</li> <li>• Portfolio</li> <li>• Links</li> </ul>	<ul style="list-style-type: none"> <li>• Employees</li> <li>• Roles</li> <li>• Team</li> </ul>

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

User List										
+ Create Filter: <input type="text"/> Apply										
Actions	Login	Clients	API key	First Name	Last Name	Email	Phone	Mobile	Create At	Last Visit
    	admin	Dummy, C...	 	Admin	AdminMan				07/31/2023 17:28:15	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 the Rillsoft project and the Rillsoft Integration Server are 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.

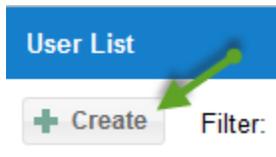
The column **API access key** offers the following options:

-  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.

**New user** ✕

Username:

Password:

Confirm Password:

Change Password on next login

Create temporary password

First Name:

Last Name:

E-mail:

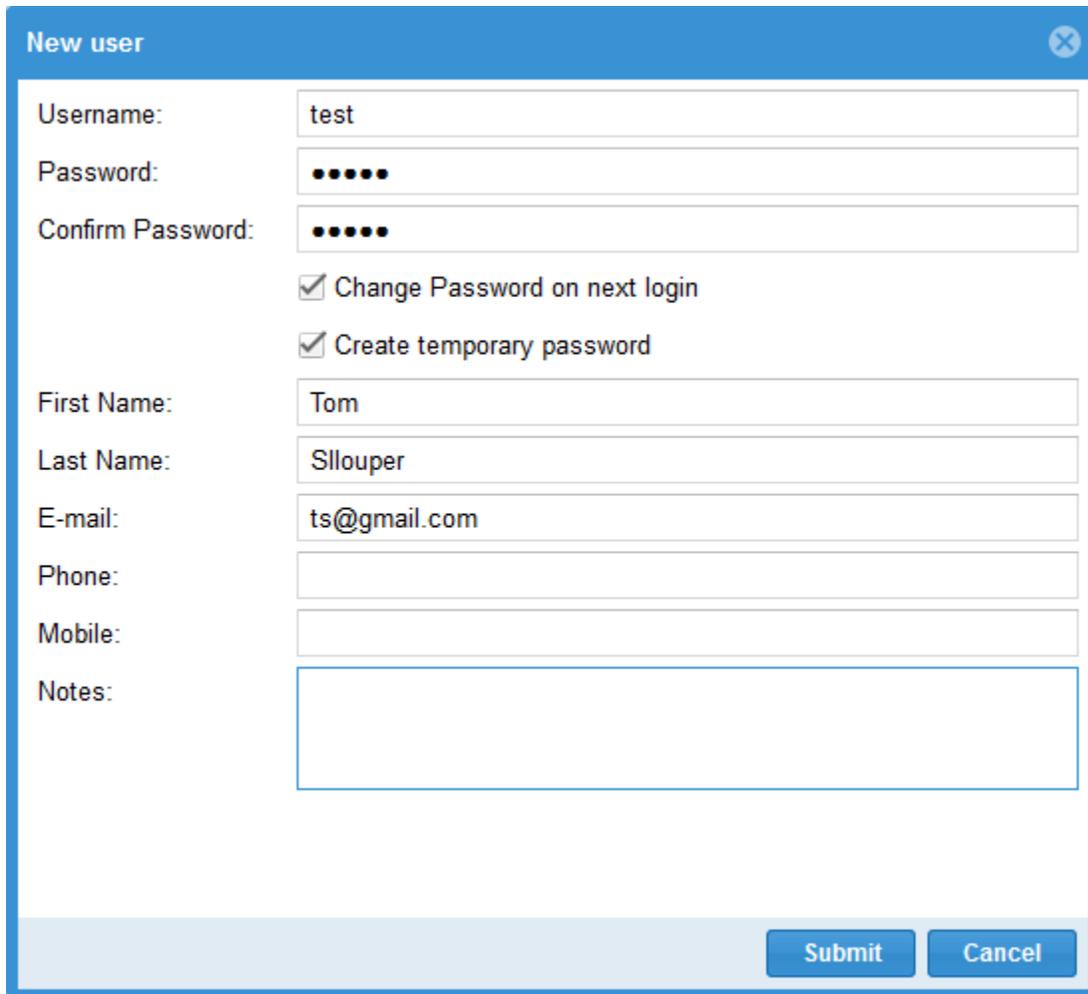
Phone:

Mobile:

Notes:

### 1.4.2 Edit user properties

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



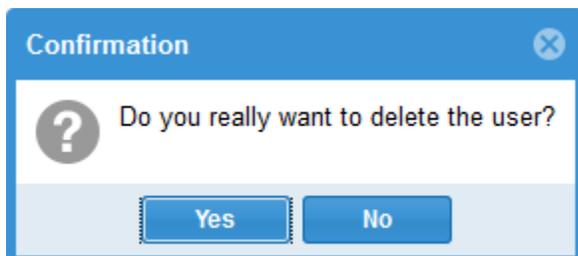
A 'New user' form with a blue header and a close button. The form contains the following fields and options:

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

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

### 1.4.3 Delete user

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



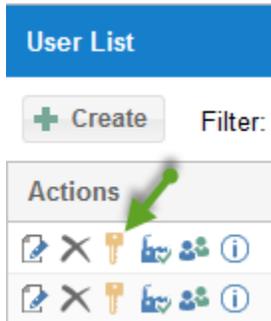
A 'Confirmation' dialog box with a blue header and a close button. It contains a question mark icon and the text: 'Do you really want to delete the user?'. At the bottom, there are two buttons: 'Yes' and 'No'.

### 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.

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 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: <input type="text" value="EN_2016"/>		<input type="button" value="Login"/>		
Folder Structure	Actions	Email Notification	Project Count	Description
▼  Root Folder		1/1/7/7/2/	0	
2016		1/1/7/7/2/	5	
Template		1/1/7/7/2/	1	
2011		1/1/7/7/2/	2	
test		1/1/7/7/2/	4	
Other		1/1/7/7/2/	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:

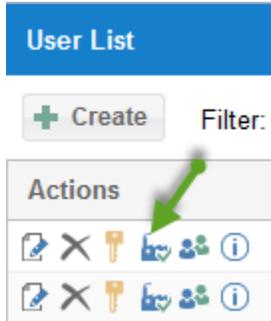
- User roles as project manager, iCalendar user and timeline user
- Folder role as the root folder user

### 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.

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:  Apply

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

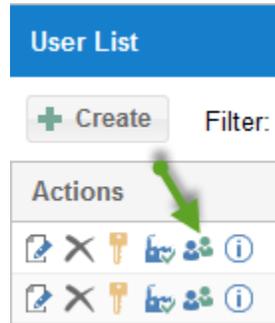
### 1.4.6 Subordinate personnel resources to a user

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**.

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
- Calendar
- Dev ▾
- Timesheet ▾

Allocation of personnel resources the user: Martin Mustermann

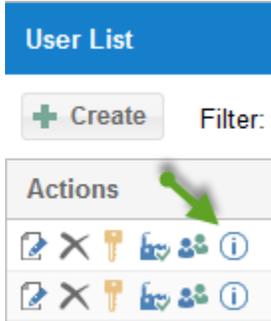
Client:  Filter:  Apply

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++

### 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.

**Rillsoft Integration Server 9.36.195**

ADMINISTRATION	PROJECTS
<div style="display: flex; justify-content: space-between;"> <div style="text-align: center;">   <b>Users</b> </div> <div style="text-align: center;">             Clients         </div> <div style="text-align: center;">             Client release         </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="text-align: center;">             Organisation chart         </div> <div style="text-align: center;">             User roles         </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="text-align: center;">             Folders         </div> <div style="text-align: center;">             Folder roles         </div> </div>	<div style="text-align: center;">   <b>Locks</b> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="text-align: center;">             Projects         </div> <div style="text-align: center;">             Portfolio         </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="text-align: center;">             Links         </div> </div>

Client:

← User: goeslike

Access rights for user roles	Permissions for directory roles	Subordinate staff
<b>Assigned roles</b>		
<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; text-align: center;">▼</div> <div style="width: 15px; text-align: center;">🔑</div> <div style="flex-grow: 1;">User</div> </div> <ul style="list-style-type: none"> <li>✓ Send e-mail</li> </ul>		
<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; text-align: center;">▼</div> <div style="width: 15px; text-align: center;">🔑</div> <div style="flex-grow: 1;">Portfolio</div> </div> <ul style="list-style-type: none"> <li>✓ Read portfolio</li> <li>✓ Create portfolio</li> <li>✓ Change portfolio</li> <li>✓ Delete portfolio</li> <li>✓ Create cross-project links</li> <li>✓ Change cross-project links</li> <li>✓ Delete cross-project links</li> </ul>		
<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; text-align: center;">▼</div> <div style="width: 15px; text-align: center;">🔑</div> <div style="flex-grow: 1;">Resource pool</div> </div> <ul style="list-style-type: none"> <li>✓ Read resource pool</li> <li>✓ Change resource pool</li> <li>✓ Lock resource pool</li> </ul>		
<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; text-align: center;">▼</div> <div style="width: 15px; text-align: center;">🔑</div> <div style="flex-grow: 1;">Vacation</div> </div> <ul style="list-style-type: none"> <li>- No permission available</li> </ul>		

**Access rights for folder roles**

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

User: goeslike																			
Access rights for user roles				Permissions for directory roles				Subordinate staff											
Directory structure				Folder				Project								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 cross project link	Enter timesheet	Accept timesheet
▼ Root Folder				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-
2016				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-
Template				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-
2011				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-
test				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-
Other				-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-

### Subordinate employees

You can see in this tab, for which employees and in what fields the user should enter timesheet 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@exempl.com		15.01 15.02	South South	16.001 support 12.001 writer	
▼ TimesheetHierarchy							
	Goeslike	goeslike@exempl.com		15.01 15.02	South South	16.001 support 12.001 writer	
▼ VacationHierarchy							
	Goeslike	goeslike@exempl.com		15.01 15.02	South South	16.001 support 12.001 writer	

### 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**.

User List					
+ Create		Filter: <input type="text"/>	Login		
Actions	Login	API key	First Name	Last Name	
	admin		Admin	AdminMan	
	mm		Martin	Mustermann	
	flg		Bodo	Fleissig	
	schw		Udo	Schwarz	

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

User List						
+ Create		Filter: <input type="text"/>	Login			
Actions	Login	API key	First Name	Last Name	Email	
	admin		Admin	AdminMan	info@rillsoft.de	
	mm		Martin	Mustermann	mm@gmx.de	
	flg		52aba507b545d1b5be6bbb81fcea38c	flg	flg@gmx.de	
	schw		Udo	Schwarz	schw@gmx.de	

## 1.5 Clients

Client list		
<a href="#">+ Create</a>	Filter: <input type="text"/>	<a href="#">Login</a>
Actions	Company Name	Description
      	Maschinenbau	
      	Mein Mandant	
      	EN_2016	
      	New Client 2016	

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

Actions	Company Name
	Mein Mandant
	EN_2016
	New Client 2016

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

Client

← Main Project settings iCalendar Retention period Import System Timeline Vaca →

Name:

Description:

Submit Cancel

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.

The screenshot shows a software window titled "Client" with a blue header and a close button. Below the header is a navigation bar with tabs: "Main", "Project settings", "iCalendar", "Retention period", "Import System", and "Vacations import". The "Project settings" tab is selected. The main content area contains three dropdown menus:

- Settings for project: per project/portfolio
- Settings for header and footer: per project/portfolio
- Settings for user view: per project/portfolio (dropdown is open, showing options: per project/portfolio, per project/portfolio, per user of client, per client)

At the bottom right of the window are "Submit" and "Cancel" buttons.

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.

**Client**

Navigation: iCalendar | **Retention period** | Import System | Timeline | Vacation planning | Vacations

Name of activity: %task\_name%

Name of project: %project\_name%

Description: %task\_employes%, %project\_notes%

Parameter:

- %project\_user\_field14% - Project user feld 15
- %project\_user\_field15% - Project user feld 16
- %project\_user\_field16% - Project user feld 17
- %project\_user\_field17% - Project user feld 18
- %project\_user\_field18% - Project user feld 19
- %project\_user\_field19% - Project user feld 20
- %task\_uuid% - Universally Unique Identifier number of activitys
- %task\_name% - Name of activitys
- %task\_employes% - Name of employee
- %task\_code% - Code of activitys
- %task\_priority% - Priorität Name of activitys
- %task\_start\_date\_time% - Start of activitys
- %task\_finish\_date\_time% - Finish of activitys
- %task\_notes% - Notes of activitys
- %task\_completed% - Completed of activitys
- %task\_physical\_metric% - Unit of deliverable activitys
- %task\_physical\_norm% - Norm of deliverable activitys
- %task\_physical\_volume% - deliverable activitys
- %task\_labour\_intensity% - effort of activitys
- %task\_duration% - Duration of activitys

Buttons: Submit, Cancel

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.

Client

Navigation: 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 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**

**Client**

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

Title:

Description:

Parameter:
 

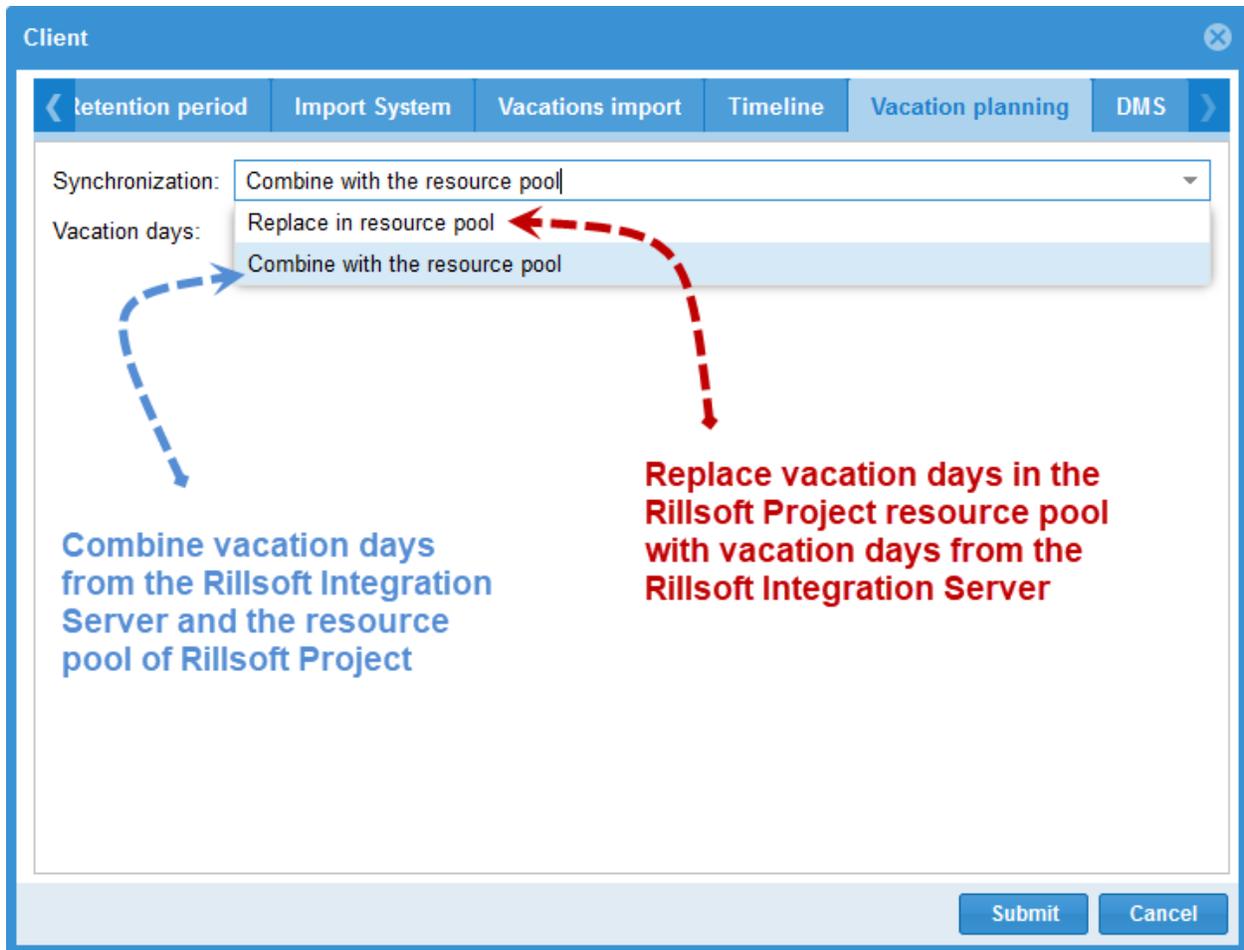
- %task\_start\_date\_time% - start date of activity
- %task\_finish\_date\_time% - end date of the activity
- %task\_notes% - notes of activity
- %task\_completed% - completed percentage of the activity
- %task\_physical\_metric% - unit of the deliverable of the activity
- %task\_physical\_norm% - norm 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

### 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

Client
✕

← idar
Retention period
Import System
Timeline
Vacation planning
Vacations import
→

Employees table/view:

Users table/view:

Submit
Cancel

## 1.5.2 Edit a client

First select **Administration > Clients**.

After clicking on the button

**Client list**

+ Create
Filter: 
Login

Actions	Company Name	Description
	Maschinenbau	
	Mein Mandant	
	EN_2016	
	New Client 2016	

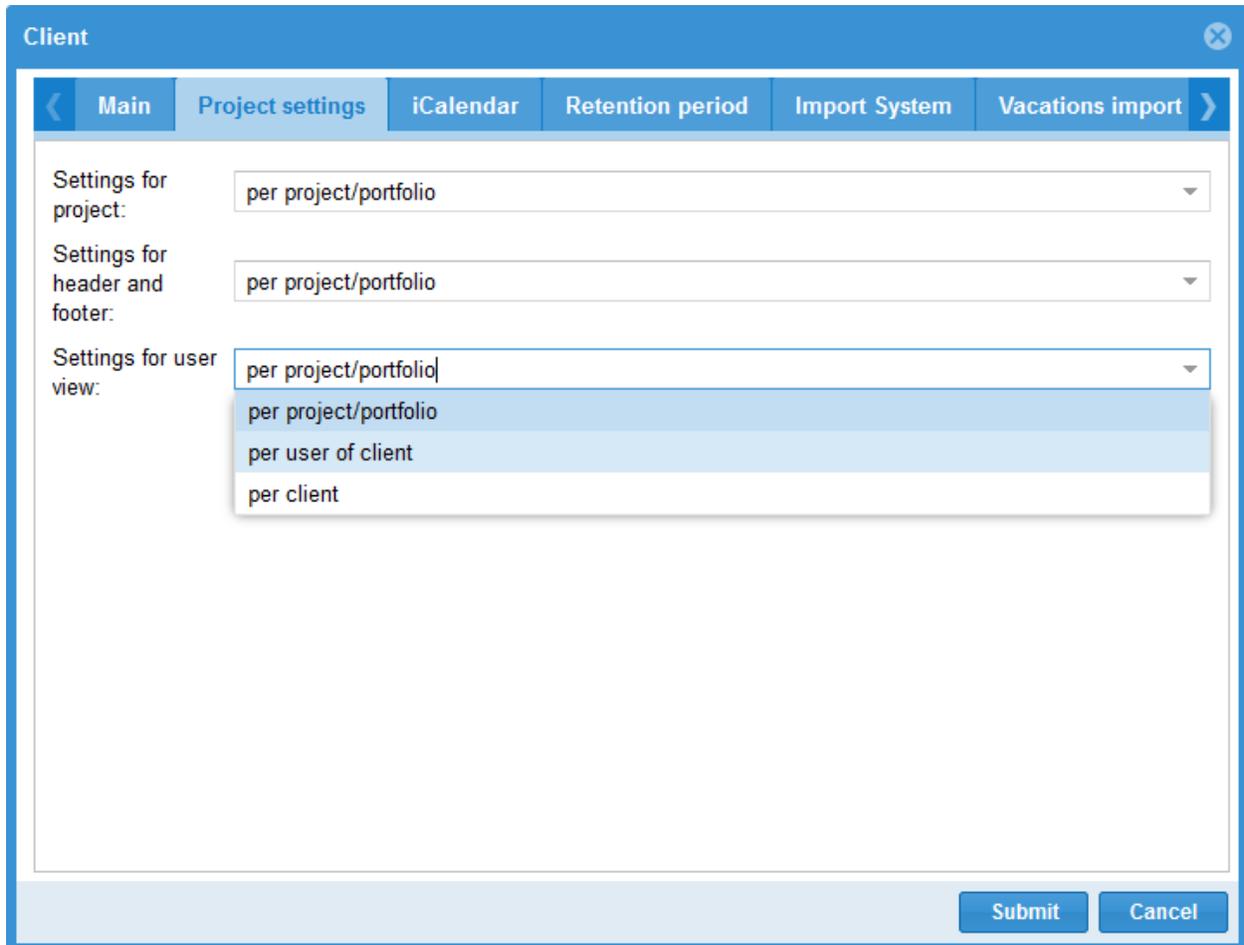
you can edit the client description.

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.
- arrangement of columns in tables
- time scale representation

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

Set also the 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.

Client

Name of activity:

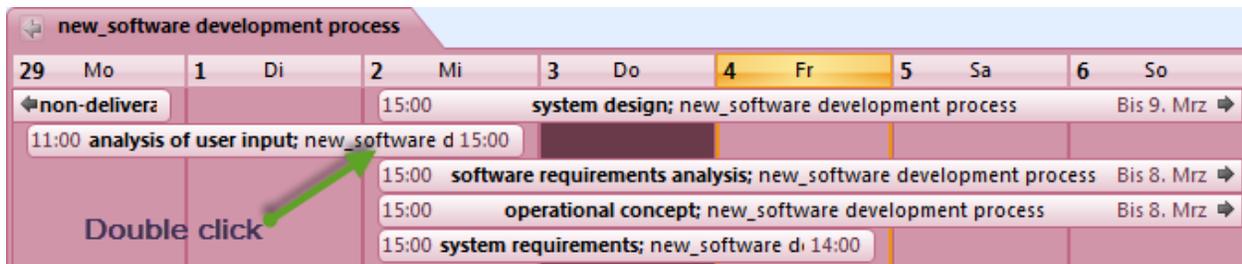
Name of project:

Description:

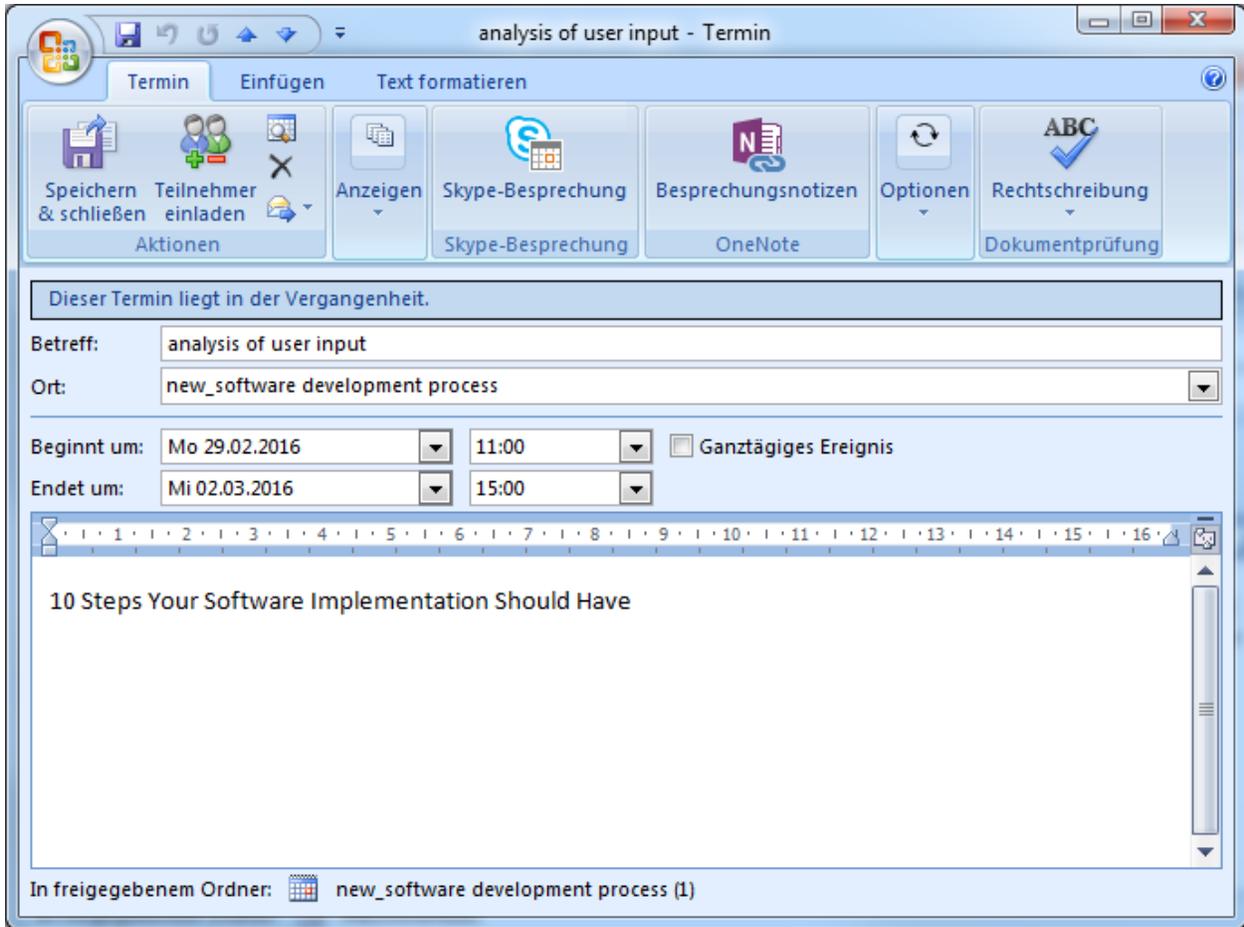
Parameter:

- %project\_user\_field14% - Project user feld 15
- %project\_user\_field15% - Project user feld 16
- %project\_user\_field16% - Project user feld 17
- %project\_user\_field17% - Project user feld 18
- %project\_user\_field18% - Project user feld 19
- %project\_user\_field19% - Project user feld 20
- %task\_uuid% - Universally Unique Identifier number of activitys
- %task\_name% - Name of activitys
- %task\_employes% - Name of employee
- %task\_code% - Code of activitys
- %task\_priority% - Priorität Name of activitys
- %task\_start\_date\_time% - Start of activitys
- %task\_finish\_date\_time% - Finish of activitys
- %task\_notes% - Notes of activitys
- %task\_completed% - Completed of activitys
- %task\_physical\_metric% - Unit of deliverable activitys
- %task\_physical\_norm% - Norm of deliverable activitys
- %task\_physical\_volume% - deliverable activitys
- %task\_labour\_intensity% - effort of activitys
- %task\_duration% - Duration of activitys

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.

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 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**

Client

Retention period Import System Vacations import Timeline Vacation planning DMS

Project View:

Level1 View:

Level2 View:

Level3 View:

Level4 View:

Submit Cancel

### Timeline

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

**Client**

Navigation: Main | Project settings | iCalendar | Retention period | Import System | Timeline | **Vacation planning**

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

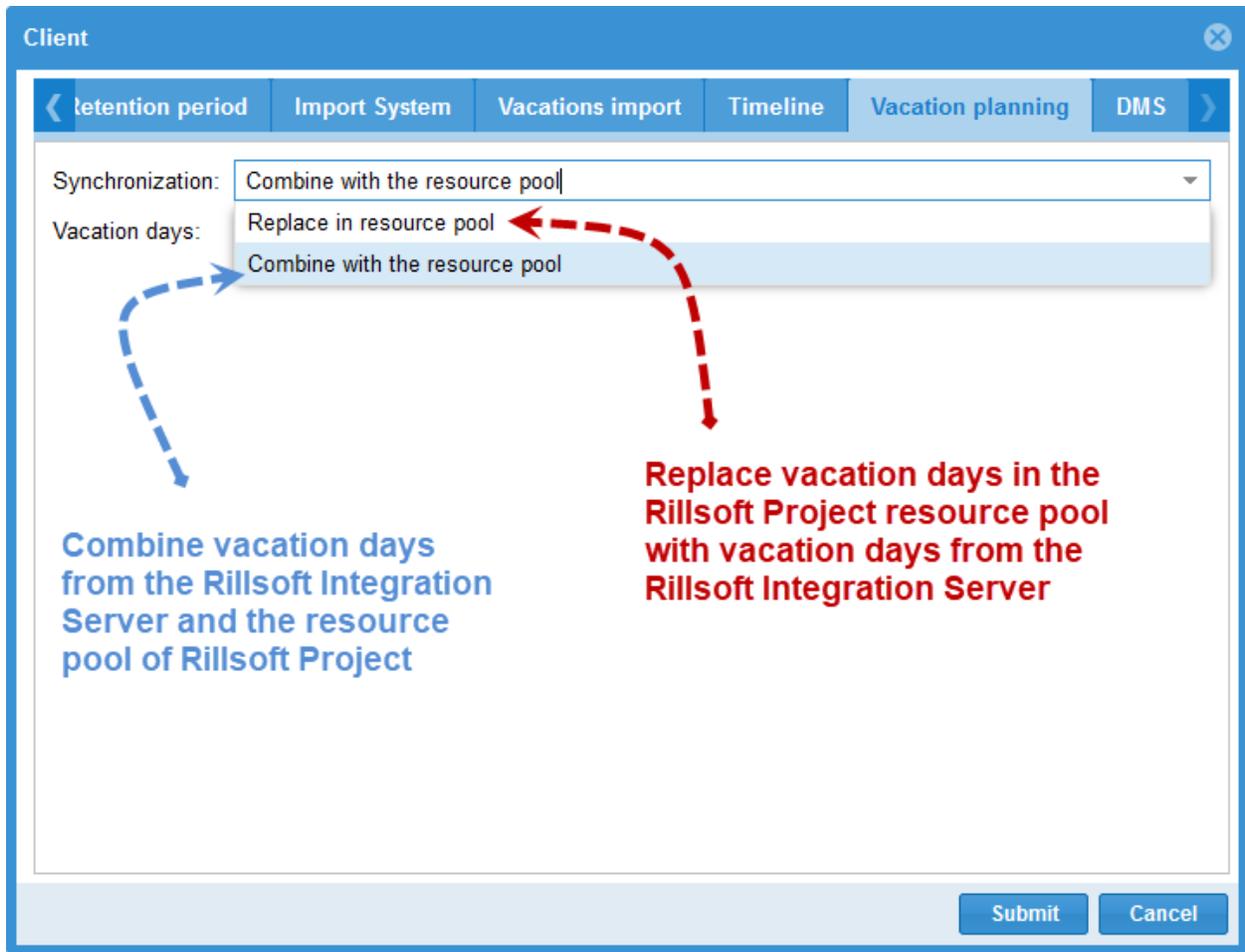
Buttons: Submit | Cancel

### 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

Client
✕

← idar
Retention period
Import System
Timeline
Vacation planning
Vacations import
→

Employees table/view:

Users table/view:

Submit
Cancel

### 1.5.3 Portfolio structure hierarchy of clients

First select **Administration > Clients**.

After clicking on the button **Folder**

Client list

+ Create
Filter:
Login

Actions	Company Name
	Mein Mandant
	EN_2016
	New Client 2016

you can create the portfolio structure of the client.

Directory list				
Client: EN_2016		<a href="#">Login</a>		
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:



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

**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.

Folder
✕

Main
E-mail Notification
synchronisation with Redmine

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

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

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

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

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

Notify users of negative effort  
 before  days prior to the

Submit
Cancel

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

Directory list

Client: 
Login

Folder Structure	Actions	Email Notification	Project Count	Description
▼ <span style="font-size: 1.2em;">📁</span> Root Folder		1/7/7/7/2/	0	
<span style="font-size: 1.2em;">📁</span> 2016		1/7/7/7/2/	5	
<span style="font-size: 1.2em;">📁</span> Template		1/7/7/7/2/	1	
<span style="font-size: 1.2em;">📁</span> 2011		1/7/7/7/2/	2	
<span style="font-size: 1.2em;">📁</span> test		1/7/7/7/2/	4	
<span style="font-size: 1.2em;">📁</span> Other		1/7/7/7/2/	1	

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.

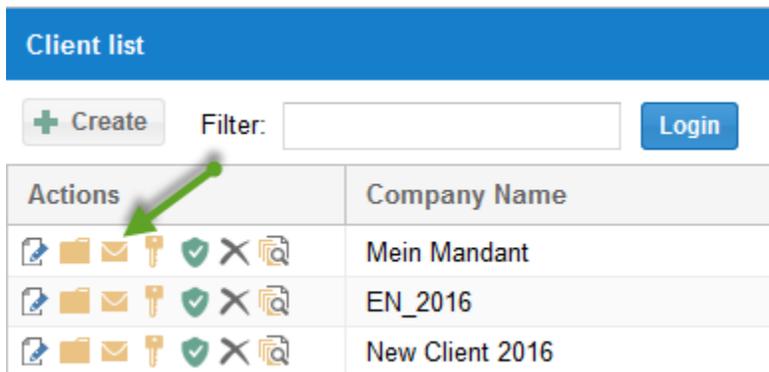
Notify users about **The change of milestone dates**, that must be completed X days in advance. If the option is on, the users will be notified by e-mail, in case of milestone dates shifts.

**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.

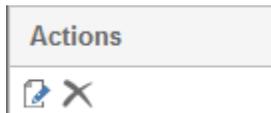
### ← Email template list for client 'EN\_2016'

+ 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.

A screenshot of a dialog box titled "E-mail template" with a close button in the top right corner. The dialog is divided into several sections:

- Template Type:** A dropdown menu showing "Temporary password".
- Thema:** A text field containing "Your access codes for Rillsoft Integration Server".
- Content:** A rich text editor area. At the top, there is a font dropdown set to "Helvetica" and several formatting buttons (Bold, Italic, Underline, Increase Indent, Decrease Indent, Text Color, Background Color, Bulleted List, Numbered List). Below the toolbar, the text reads: "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:** A text field listing the available 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", and "%user\_password% - Temporary user's password".

At the bottom right of the dialog, there are two buttons: "Submit" and "Cancel".

### 1.5.5 Client's user list

Client list

+ Create
Filter: 
Login

Actions	Company Name
	Mein Mandant
	EN_2016
	New Client 2016

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**.

The screenshot shows a web interface titled "Client list". At the top left is a "+ Create" button, followed by a "Filter:" text input field, and a "Login" button. Below this is a table with two columns: "Actions" and "Company Name". The "Actions" column contains a set of icons: a pencil, a folder, an envelope, a key, a shield, an 'X', and a magnifying glass. The "Company Name" column lists three entries: "Mein Mandant", "EN\_2016", and "New Client 2016". A green arrow points to the shield icon in the first row.

Actions	Company Name
	Mein Mandant
	EN_2016
	New Client 2016

Mark the license for 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...	✓

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

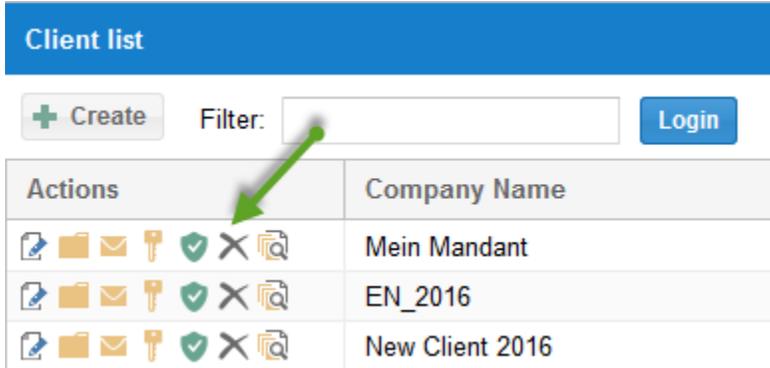
← Floating licenses of the client: Maschinenbau

+ New floating license    Filter:     Login

### 1.5.7 Delete a client

First select **Administration > Clients**.

After the clicking on the button

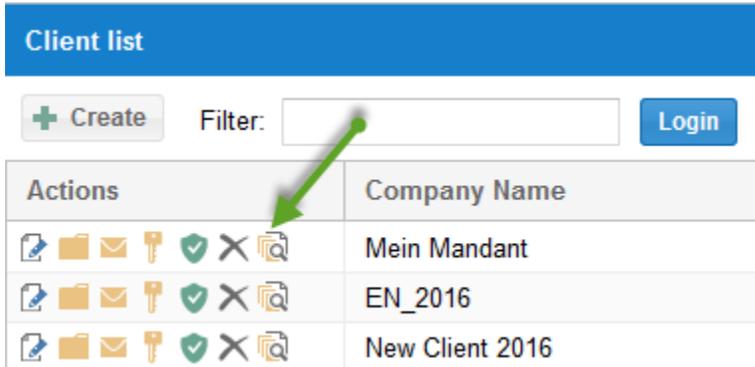


you can delete a client.

### 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**.

Client Access List

Filter:

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	-	✓	-	-	-	-	-	-	-

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 a user 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, iCalendar, timeline)
- Timesheet
- Vacation planning

Organization Chart						
Hierarchy: Timesheet		Filter:				
Users Organ						
Admin						
Martin Mustermann	mm					
Bodo Fleissig	flg					
Udo Schwarz	schw					
Andreas Weiss	wss					
Niko Schwarzmann	tb					

### 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 **Drag & Drop** you can change the layout.



- 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**

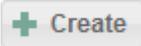
- read user calendar
- read secondary user calendar
- read client calendar
- read project calendar
- read portfolio calendar

**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

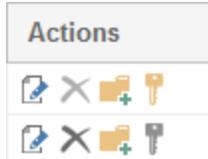
First select **Administration > Clients**.

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

Directory list				
Client: <input type="text" value="EN_2016"/>		<input type="button" value="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	

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

In addition, the following functions are available:



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

**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.

Folder
✕

Main
E-mail Notification
synchronisation with Redmine

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

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

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

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

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

Notify users of negative effort  
 before  days prior to the

Submit

Cancel

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

Directory list

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	

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
 	Root-Verzeichnis Administrator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
 	Root-Verzeichnis Manager	-	-	-	-	✓	✓	✓	-	-	✓	-	-	-	-	✓	-	✓
 	Root-Verzeichnis Benutzer	-	-	-	-	-	✓	-	-	-	-	-	-	-	✓	-	-	✓

## 1.10 Folder roles

Folder role																		
<input type="button" value="+ Create"/>		Client: EN	Folder: Root Folder															<input type="button" value="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
	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

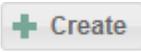
### **Timesheet**

- 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).



## PROJECTS

### 2.1 Lock

Rillsoft Integration Server 9.36.195

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

PROJECTS: Locks, Projects, Portfolio, Links

RESSOURCENPOOL: Employees, Employee role, Teams

Filter:  Login

Locked projects | Locked resources pool | Locked floating licenses

Action	Folder way	Project name	Coc	Project locked at	IP-adress of u...	User name
<input type="button" value="X"/>	Root Folder->2016	new_software devel...		03/04/2016 13:32:49	127.0.0.1	Admin AdminMan

**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

- or unlock selected projects by clicking on the button  in the column **Actions**.

#### 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 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

Locked projects		Locked resources pool	Locked floating licenses		
Action	Serial number	Version	License locked at	IP-adress of user	User name
	JK...76J...04...04...1...L...E...7...02v1	2 Enterprise	16.07.2015 08:57:56	127.0.0.1	Admin AdminMan

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

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
- Dev
- Timesheet
- DMS
- Import System
- E-mail Notification
- Timeline
- Redmine
- Vacation import
- Vacation

---

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

The following selection criteria are available:

**Projects**

Client: EN\_2016 Automatic plant: Custom Date start: 01/01/2016 Date end: 03/15/2016 Filter:  Login

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

### Functions

**Actions**

	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:

**Default location**

Projects:  ...

Portfolios:  ...

Templates:  ...

Documents:  ...

**Default parameters for new activity**

Fix:   Disregard team and employee calendar

Duration:  h  Start of activity only at first shift

**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  min

Move due date to current date  Currency:

Check for new versions  Undo depth:

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

**Rillsoft integration server**

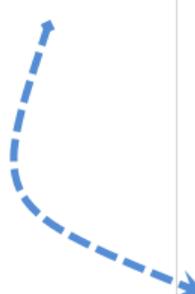
Enter commit comment for project versions  Use a proxy server for your LAN

Timeout:  s Adresse:

HTTP authentication Port number:

User name:  User name:

Password:  Password:



## 2.3 Portfolio

**Rillsoft Integration Server 9.36.195**

ADMINISTRATION

  
**Users**

  
 Clients

  
 Client release

  
 Organisation chart

  
 User roles

  
 Folders

  
 Folder roles

PROJECTS

  
**Locks**

  
 Projects

  
**Portfolio**

  
 Links

**Portfolio**

Client:  Filter:  Login

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

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

**Actions**




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.

**Projects**

Client:  Portfolio:  Automatic plant:  Date start:  Date end:  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		

## 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.

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

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

✅	<b>Status accepted</b>
⚠	<b>Conflict message</b>
➡	<b>Shift successor</b>
✅	<b>Correct delay by reserve</b>
🔍	<b>Revision history</b>

### Status

The column **Status** can check whether any temporal changes related to the start or 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.

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

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

Projektübergreifende Verknüpfungen							
Mandant:	Maschinenbau	Period:	Benutzerdefinier	Von:		Bis:	
Filter:							
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.

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

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



## RESSOURCENPOOL

### 3.1 Employees

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
- Calendar
- Dev
- Timesheet

Employee list

Client: EN 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 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.

Project name	Priority	Code
2016_2_soft	↑	Sort Ascending
Employee_2016_non_work	↓	Sort Descending
Initiation		Columns

### 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.

User List									
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	

## 3.2 Roles

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

Role

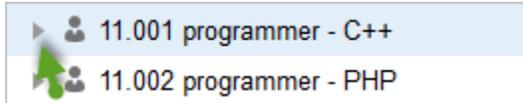
Client:  Filter:

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 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

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

Teams

Client:  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 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

## 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

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
🗓️	-----		http://192.168.181.128/icalendar/v1/getics?api_key=ce08cc02e9ac075e0babafba4dd247c2&client_id=5&portfolio_id=11

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.

**Client list**

[+ Create](#) Filter:  [Login](#)

Actions	Company Name	Description
	Maschinenbau	
	Mein Mandant	
	EN_2016	
	New Client 2016	

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

**Client**

[iCalendar](#)
[Retention period](#)
[Import System](#)
[Timeline](#)
[Vacation planning](#)
[Vacations](#)

Name of activity:

Name of project:

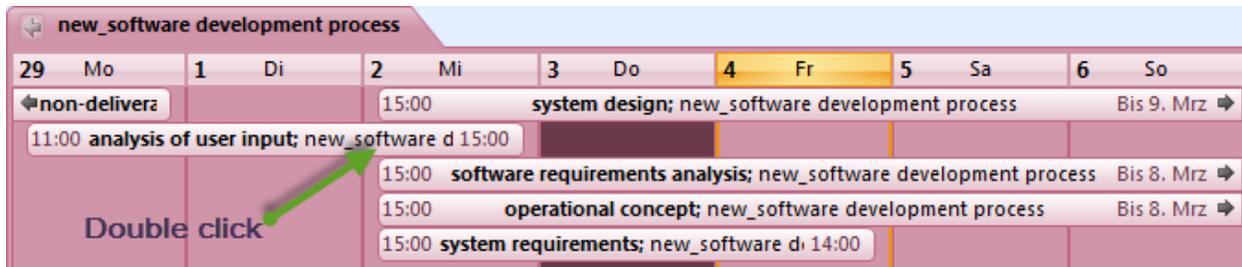
Description:

Parameter:

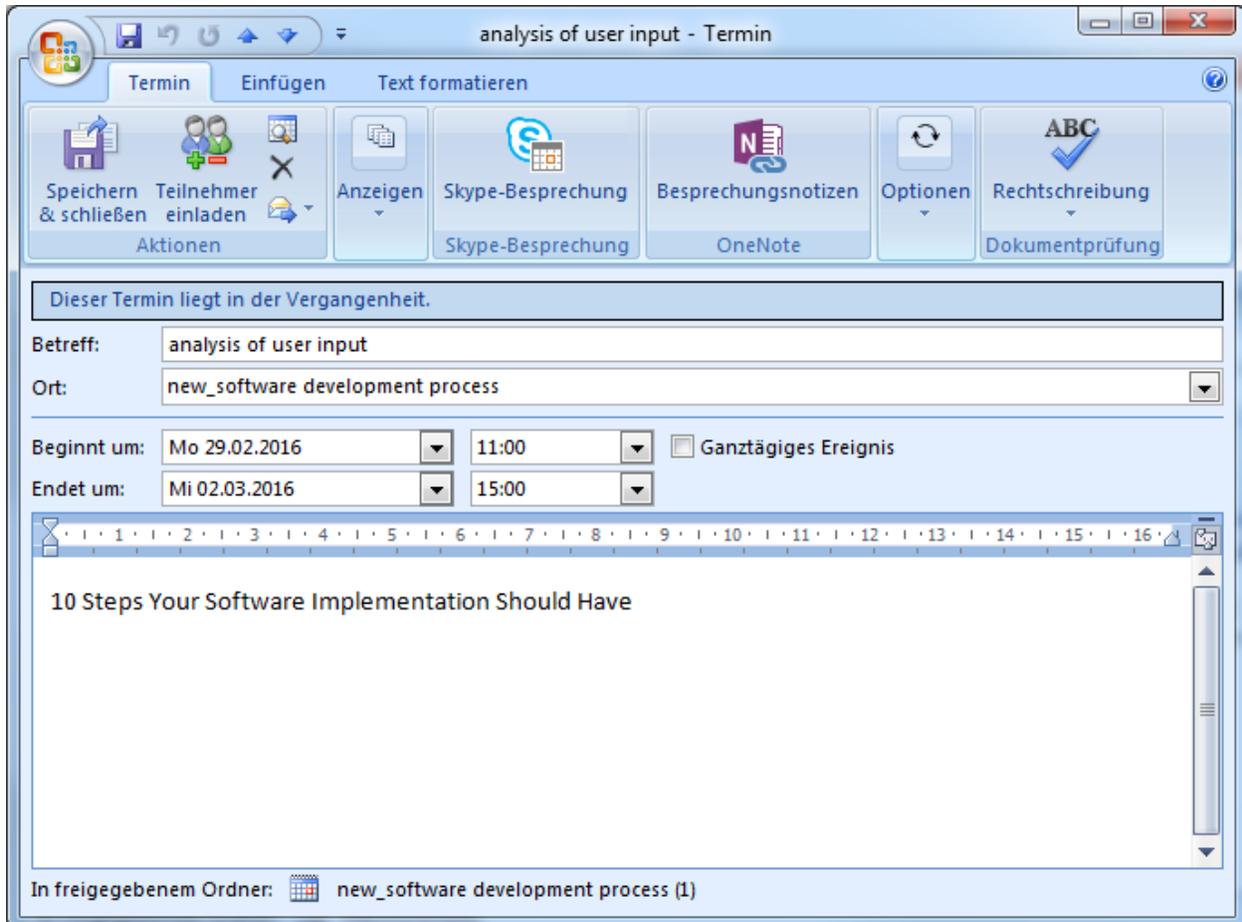
- %project\_user\_field14% - Project user feld 15
- %project\_user\_field15% - Project user feld 16
- %project\_user\_field16% - Project user feld 17
- %project\_user\_field17% - Project user feld 18
- %project\_user\_field18% - Project user feld 19
- %project\_user\_field19% - Project user feld 20
- %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% - Priorität 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 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**

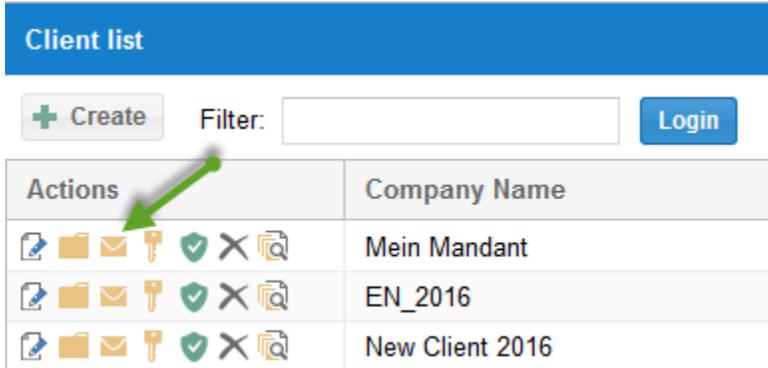
**Access rights**

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

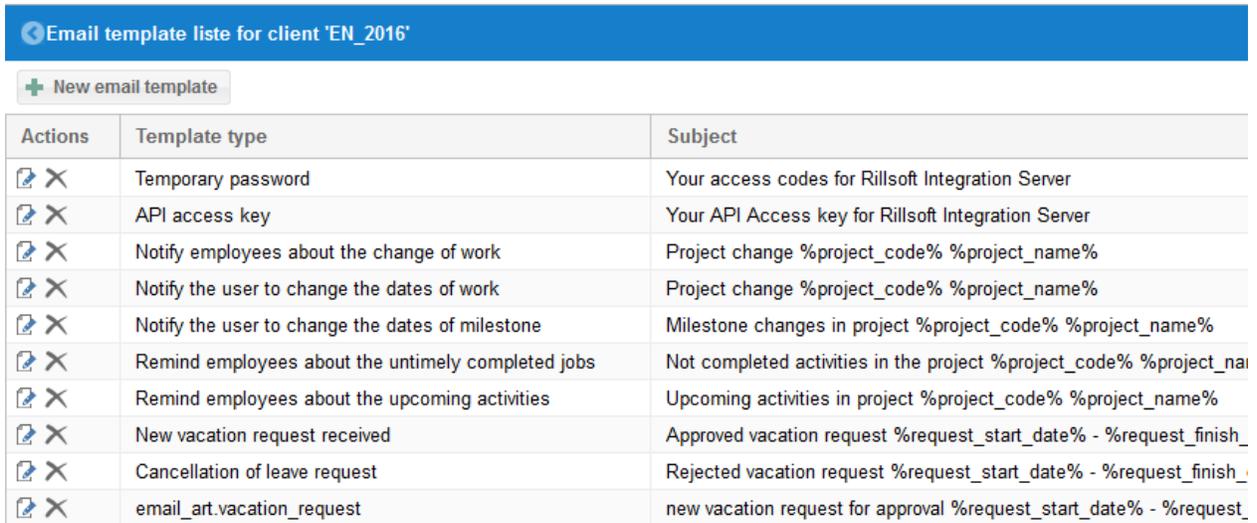
To set the **deadlines for automatic email dispatch**, a user should have the **root folder administrator** folder role.

**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.

Folder ✕

Main
E-mail Notification
synchronisation with Redmine

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

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

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

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

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

Notify users of negative effort  
 before  days prior to the

Submit
Cancel

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

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	

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.

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

Organization Chart

Hierarchy:  Filter:

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

Accounts

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

ADD-ONS

- Calendar
- Retention period
- Import System
- Vacation import
- Dev
- E-mail Notification
- Timeline
- Redmine
- Vacation

Accounts

Client: EN Year: 2024 Filter:

Action	First name	Last name	e-mail	Claim	Rest from...	Approved	Request f...	Rest	Ill	
	Bill	Diligent	dlg@gmail.com	24	0	0	0	24	0	0
	John	Tidy	td@gmail.com	24	0	0	0	24	0	0
	Red	Superman	superman@exampl.com	24	0	0	0	24	0	0

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

**Annual leave** ✕

Employee:

Year:

Vacation days:

Rest from 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.

Group calendar

Client: EN Filter: Apply

Action	Name of Group calendar	Note
	programmer	

Assigning the personnel resources to the group calendar; programmer

Filter: Apply

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	dig@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

5 add employees to the group calendar

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

## Applications

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

Urlaubsanträge

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

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

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

✕
Neuer Antrag

Mitarbeiter:

Freigabe durch:

Anfang:  📅

Ende:  📅

Urlaubsart:  ▼

Kommentar: 

Urlaub  
 Schulung  
 Krankheit

Urlaubsantrag genehmigen

Speichern
Abbrechen

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

Request for vacation

+ Create
Client: 
Year: 
Filter: 
Login

Action	Request								Approval		
	Type	Duration	First name	Last name	Start	Finish	Request or	Provided by	Status	Appro...	Approved by
<span style="font-size: small;">🔗</span> <span style="font-size: small;">✓</span> <span style="font-size: small;">✕</span> <span style="font-size: small;">⚠️</span>	V	2	Eager		03/11/2016	03/14/2016	03/04/2016	Admin AdminMan	Applied for		Admin AdminMan

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

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**.



Event log of vacation planning				
Client: EN_2016		Automatic plant: Custom	Date start: <input type="text"/>	Date end: <input type="text"/>
Filter: <input type="text"/>			<a href="#">Login</a>	
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

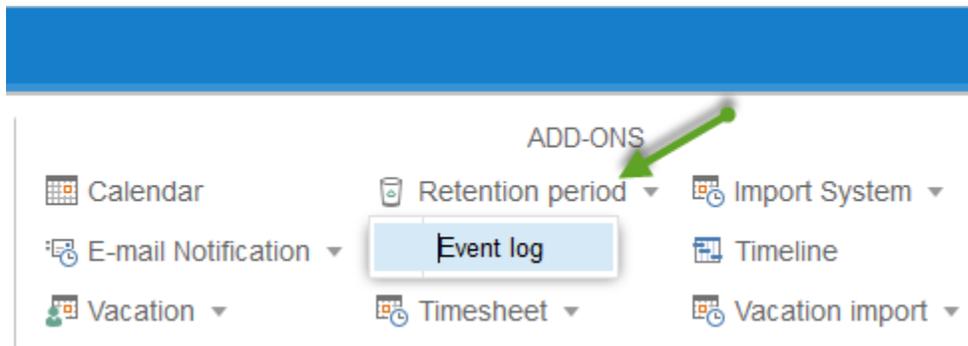
Best regards

## 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.

Ereignisprotokoll von Datenvernichtung				
Mandant: Beispiel_2014		Period: Benutzerdefinier	Von: <input type="text"/>	Bis: <input type="text"/>
Filter: <input type="text"/>			<a href="#">Anwenden</a>	
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	

### Requirements

In client properties

Client list	
<input type="button" value="+ Create"/> Filter: <input type="text"/> <input type="button" value="Login"/>	
Actions	Company Name
	Mein Mandant
	EN_2016
	New Client 2016

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

Client
✕

Main
Project settings
iCalendar
Retention period
Import System
Timeline
Vacat

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

#### 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:

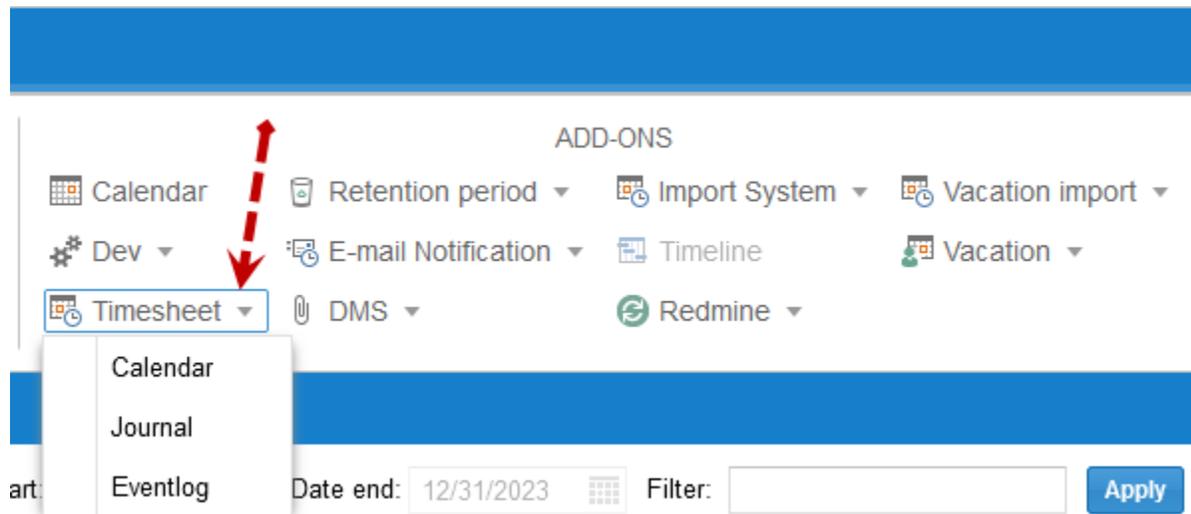
- the user role **Project user**, this allows a user to read the portfolios and a resource pool
- the **Root folder user** directory role, which allows a user to read projects and enter feedback

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.

Timesheet calendar																			
Client: EN_2016		Employee: - All Employees -		Automatic plant: Custom		Date start: 02/01/2016		Date end: 04/25/2016		Filter: <input type="text"/>		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	Mc	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					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

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.

Timesheet calendar																			
Client: EN_2016		Employee: - All Employees -		Automatic plant: Custom		Date start: 02/01/2016		Date end: 04/25/2016		Filter: <input type="text"/>		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	Mc	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

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.

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:  Add note

Completed:

Notes:

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 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**.

The screenshot shows the Rillsoft Integration Server 9.36.195 interface. The top navigation bar includes tabs for ADMINISTRATION, PROJECTS, RESOURCE POOL, and ADD-ONS. The ADD-ONS tab is selected, and the 'Documents' menu item is highlighted. Below the navigation bar, there are filters for Client (Produktion), Automatic plant (Last year), Date start (01/01/2023), Date end (12/31/2023), and Filter. The main content area displays a table of documents.

Action	Folder	Filename	Description	Size	Activitz / Subproject	Project name	project_grid.column.way	Last saved on	Last saved by
X Q	Root Folder->2023->Verträge	06_07_2012_vist...		272.73 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Verträge	04_07_2012_bd_...		26.30 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Verträge	02_07_2012_sipg...		101.90 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Angebote	A144889.pdf		113.41 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Fachunt...	Fachtechnische ...		11.55 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Bilder	softwaredevelop...		17.62 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Fachunt...	Handbuch Arbeit...		942.76 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan
X Q	Root Folder->2023->Fachunt...	Abnahmeprotokol...		8.51 KB		Produktion_A...	Root Folder/2023	08/28/2023 15:42	Admin AdminMan

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**

Rillsoft Integration Server 9.36.195

ADMINISTRATION

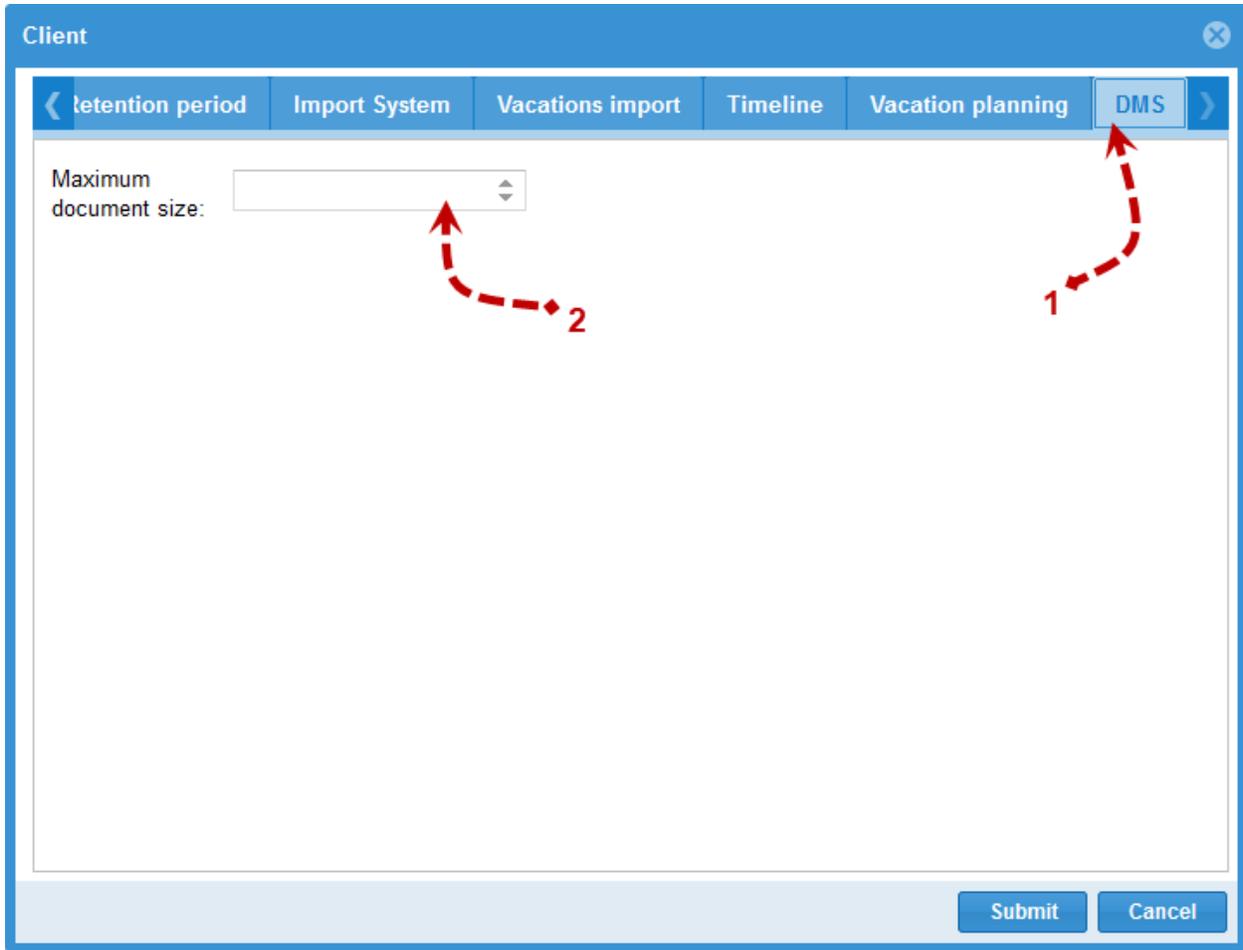
- Users
- Clients**
- Client release
- Organisation chart
- User roles
- Folders
- Folder roles

Client list

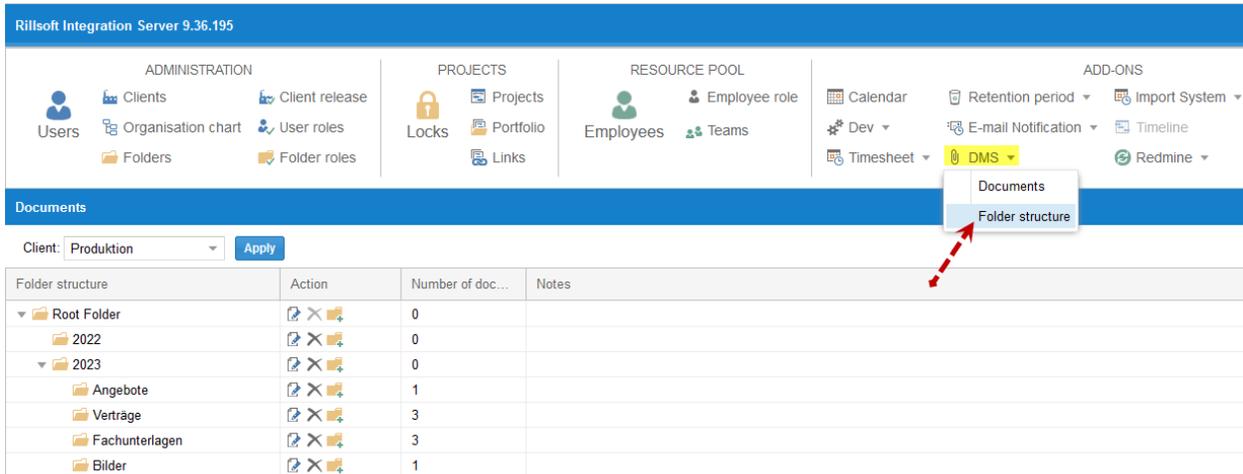
+ Create Filter:  Apply

Actions	Company Name
      	Dummy
      	Construction
      	Maschinenbau
      	Produktion
      	EN

and then enter the big one.



### Folder structure



You can freely define folder structure.

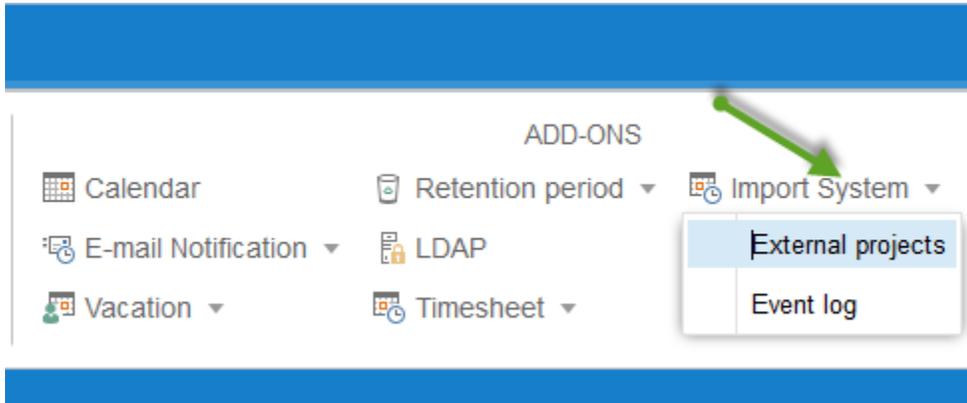
### Note

- 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: <input type="text"/>		<a href="#">Login</a>		
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**.

Mandant
✕

← Allgemein
Projekteigenschaften
iCalendar
Aufbewahrungsfristen
Projekt Import
Tii →

Projekt View:

Level1 View:

Level2 View:

Level3 View:

Level4 View:

Speichern
Abbrechen

### Event log

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

Event log of Project Import			
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

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

## 4.8 Timeline

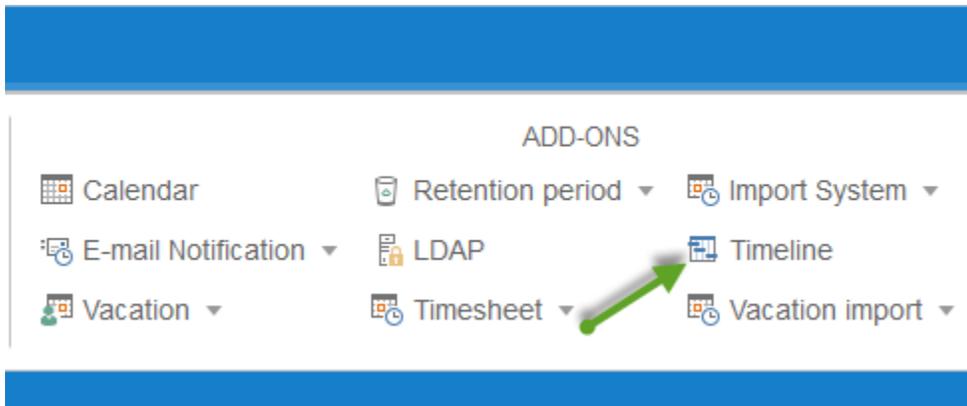
The module provides the activities in the time scale in the Internet browser window.

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

### Functions

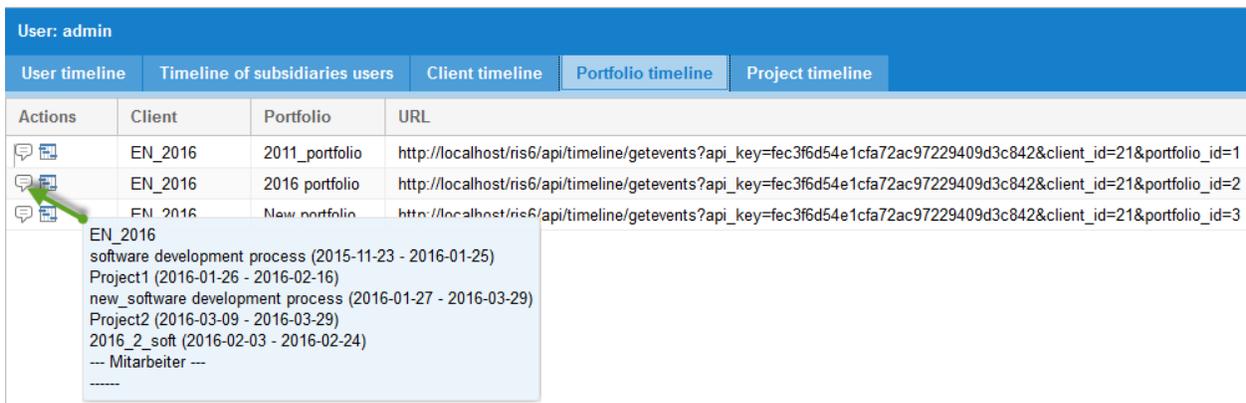
- User timeline displays all the user activities cross-project per client.
- Subordinate users' timeline shows all activities of the subordinate user (based on Administration-Organization chart) cross-project per clients.
- Clients timeline provides all client's activities in all projects.
- Portfolio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

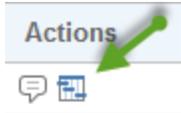
After clicking on one of the tab, you can view the time list.



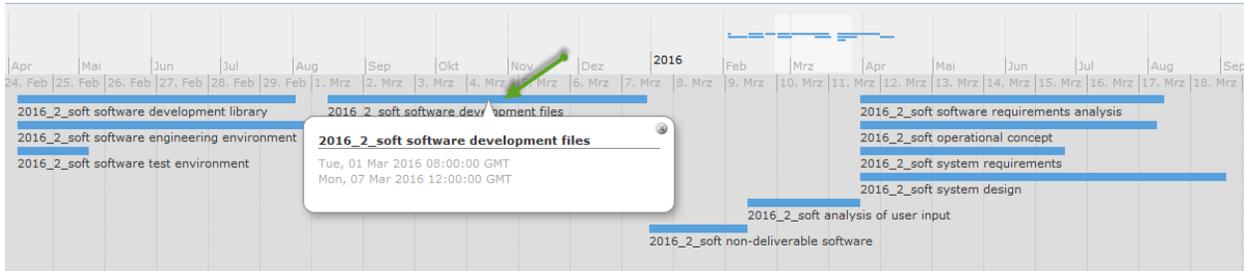
If you move the mouse over speech bubble, you can notice the information about projects and employees.

### Timeline in Internet browser window

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



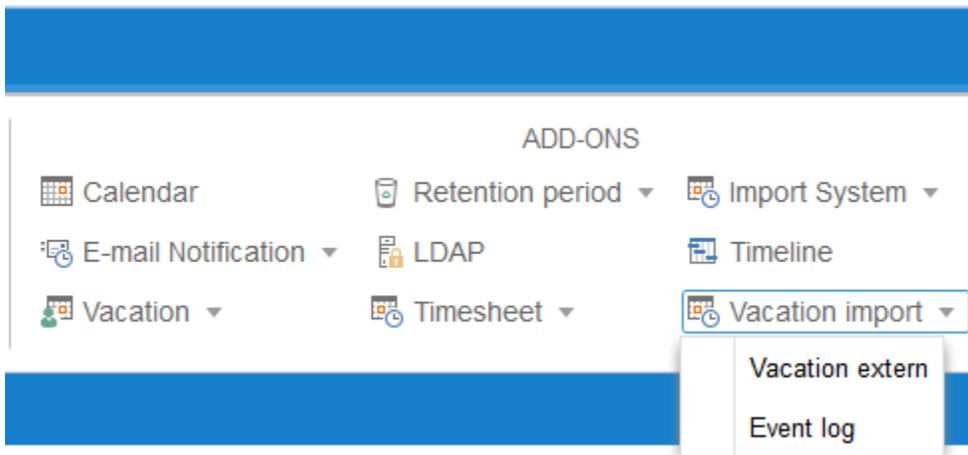
to get the project information in the form of timeline.



## 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.

Vacation extern

Client:  Filter:

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.

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

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

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- search

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