

ActiveCollab Recurring Tasks Module Manual

Installation Process

- 1) Unzip archive to any directory on your computer;
- 2) With the help of ftp client or web interface, upload folders to ac directory. Overwrite all folders when asked;
- 3) Go to AC-> Admin-> Modules-> Recurring Tasks and Install it;
- 4) Go to relevant project and click on Recurring tasks tab;
- 5) Keep your work productive!

Description

You spend too much time on the same actions creating tasks that occur periodically: meetings, conversations, maintenance, etc. Now you won't have to worry about it – system will make everything according to your template you made at “Recurring tasks” tab under specific project.

You can create rules of using this tab to different groups of users based on Project Roles of system.

How it works?

Creating Recurring Tasks:

You have several tickets or tasks that should be executed once in several days. Go to “Your Project”-> Recurring tasks tab and click on New Recurring Task. Select ticket from the list you want to create template from.

Based on that ticket your template will be created along with responsible, assignees, tasks, Milestone, Title and Description of the ticket.

If you want to create just task inside ticket select “Create Task” or if you want to include some tasks to be created along with selected tickets check on “Include Tasks” and select which tasks should be created along with ticket.

There are 3 Scheduled Options:

- Every week on specific days;
- Specific days of the month;
- Execute every number of days starting from start date;

Also it is required to check the due in period when each task will be “Due in” after the date it is created.

There are also “Start Date” and “End Date” fields that you should select during what period of time this template will be actual.

The template will inherit the following fields from the ticket you've selected: Title, Description, Milestone, Priority, Responsible and Assignees. Once created you can edit Recurring task template as you'd like it to create tickets in future if anything differs from the ticket you've selected during Recurring task creation.

Note: You should set up daily scheduled task at described here - <http://www.activecollab.com/docs/manuals/admin/configuration/scheduled-tasks> or you can see instructions at your Admin->Scheduled Tasks page

Managing Recurring Tasks:

When you are located at the “Recurring Tasks” page you see the list of Recurring tasks templates you’ve created under relevant Milestones.

Short information about each template includes:

- Title of the template;
- Who is responsible and all assignees;
- Start and End dates the template is valid;
- # of Remaining times this template will execute;
- When the ticket expires(Due in) once it’s created.
- What should be created: Ticket, Task or Ticket+Task

You can click on the template to see more details information and edit it if you want something to be changed.

Requirements:

– Tickets Module should be installed.