

PLANNERS

ADMINISTRATION TOOL

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WHAT ARE THE GARGANTUA PLANNERS FOR?

The planners allow you to specify the precise working hours and days of your colleagues. This information will be taken into account by Gargantua to calculate deadlines and/or restrict connection to given time periods for some users.

The Gargantua planners can be classified into different categories, according to the level and object type to which they apply:

- [The whole server](#);
- [The delayed operations](#);
- [A user](#);
- [A process](#).

All planners existing on a given server are listed by category in the **Planners** branch of the Administration Tool.

PLANNER TYPES AND PRIORITIES

DEFAULT PLANNER

The default planner is identified by the  icon. It allows you to specify the working hours and days for your organization as a whole, at server level.

This planner will be assigned by default to all newly created users and you will be able to associate it to as many process definitions as you want.



If the default planner is not explicitly associated to any process or user, it will not have any effect on the behavior of the Gargantua server.

DELAYED OPERATIONS PLANNER

The delayed operations planner is identified by the  icon. It is common to all the types of delayed operation that can be started from the Web Client:

- : Export operation;
- : Import operation;
- : CSV export operation;
- : Text indexing operation;
- : File relocation operation;
- : Assignment of the new security profiles operation;
- : Update file sizes operation;
- : Note files relocation operation;
- : Textarea attribute files relocation operation;
- : Generate PDF files operation.

The delayed operations planner allows you to specify at what time it is better to run the delayed operations. Before starting a delayed operation from the Web Client, the user will be able to choose to respect this planner or not thanks to the **Schedule execution according to the delayed operations planner** checkbox.

*For example, in an organization opened from Monday to Friday during daytime, it is useful to set the delayed operations planner active time (blue boxes) at night or during the week-end, when nobody is logged in to GARGANTUA, in order to avoid any performance loss. Thus, if a user launches a delayed operation in the morning, and checks the **Schedule execution according to the delayed operations planner** checkbox, the operation will only start in the evening.*

USER PLANNERS

User planners are identified by the  icon. They allow you to specify the precise working hours and days for individual users of the Gargantua server.

When a specific planner is defined for a particular user:

- You can prevent this user to log into Gargantua when he is not supposed to be working (see [Defining the default planner for the Gargantua server](#)).
- If the user accepts a workflow task, then its deadlines are recalculated according to the user-specific planner.

In an organization where the working day spans from 9 am to 6 pm, suppose a task that expires after 2 hours arrives in the appropriate users' inboxes at 5 pm on Tuesday: if the task is accepted by a user who has a planner indicating he does not work on Wednesdays, then the task only expires on Thursday - not Wednesday - at 10 am.



Only the deadlines for tasks - not those for processes as a whole - are recalculated according to the appropriate user's planner: a process can therefore be considered as late globally, while the current task is not.

PROCESS PLANNERS

Process planners are identified by the  icon. They allow you to specify the working hours and days that must be taken into account when calculating the deadlines for the instances of a particular process (estimated working and/or expiration time).

Suppose a user starts an instance of a process at 5 pm on Monday and the process definition mentions that the process expires after 16 hours. If no planner is defined for the process, then it expires at 9 am on Tuesday. On the contrary, if the process planner indicates that the working hours span from 9 am to 6 pm, then the process only expires at 3 pm on Wednesday.

A process planner also applies to the process' individual tasks (estimated working and/or expiration time), as long as those have not yet been accepted by a user who possesses his own [personal planner](#).

For example, if the estimated working time for a given task is 2 hours but the task only arrives in the appropriate users' inboxes at 12 pm and the process planner specifies the 1 am-2 am period is the lunch break, then the task will not be considered late before 3 pm.

DEFINING THE DEFAULT PLANNER FOR THE GARGANTUA SERVER

To define the default planner for the Gargantua server, proceed as follows:

1. In the left pane of the Administration Tool, expand the **Planners** branch.
2. Click the **Default planner** sub-branch.

The default planner management screen displays in the right pane.

3. In the **Timetable** tab, in the **Weekly timetable**, indicate the standard working hours in your organization for each day of the week (click on a table cell to check/uncheck it).
4. If some dates do not fall under the standard timetable (bank holidays, exceptional closure/opening days...), click the **Exceptions** tabs to signal them.
5. In the **Exceptions** tab, click the  tool to add a date.
6. Click the mini-calendar on the right of the **<choose date>** field to select a day.
7. Check the table cells that correspond to the working hours for this date, if any.

The  **Reset planner day** tool allows you to uncheck all table cells for the current exceptional date in a single move.

The  **Default timetable tool**, on the other hand, allows you to check the same table cells for the current exceptional date that are normally checked for the corresponding day of the week in the regular weekly timetable.

*Example: your company will be working on Monday 24th December 2012, but only in the morning; then, the **Default timetable** tool allows you to check all boxes for a standard Monday in a single move, before making the necessary changes.*

8. If the exception you have just defined repeats every year, check the **Recurrent** checkbox (this option is especially useful for bank holidays that recur on the same date each year, such as the 1st of May).
9. If you want to delete one of the exceptions you have defined, select it in the list, then click the  **Delete exception** tool.

When you have finished defining the planner, click the **Apply** button in the bottom left corner of the right pane.

DEFINING THE PLANNER FOR THE DELAYED OPERATIONS

To define the planner for all the delayed operations, proceed as follows:

1. In the left pane of the Administration Tool, expand the **Planners** branch.
2. Click the **Delayed operations planner** sub-branch.

The delayed operations planner management screen displays in the right pane.

3. In the **Timetable** tab, in the **Weekly timetable**, specify for each day of the week at what time it is better to run the delayed operations, for example when your organization is closed (click on a table cell to check/uncheck it).
4. If some dates do not fall under the standard timetable (bank holidays, exceptional closure/opening days...), click the **Exceptions** tabs to signal them.
5. In the **Exceptions** tab, click the  tool to add a date.
6. Click the mini-calendar on the right of the **<choose date>** field to select a day.
7. Check the table cells that correspond to the delayed operations active hours for this date, if any.

The  **Reset planner day** tool allows you to uncheck all table cells for the current exceptional date in a single move.

The  **Default timetable tool**, on the other hand, allows you to check the same table cells for the current exceptional date that are normally checked for the corresponding day of the week in the regular weekly timetable.

8. If the exception you have just defined repeats every year, check the **Recurrent** checkbox (this option is especially useful for bank holidays that recur on the same date each year, such as the 1st of May).
9. If you want to delete one of the exceptions you have defined, select it in the list, then click the  **Delete exception** tool.

When you have finished defining the planner, click the **Apply** button in the bottom left corner of the right pane.

DEFINING THE PLANNER FOR AN INDIVIDUAL USER

To define the planner that applies to an individual Gargantua user, proceed as follows:

1. In the left pane of the Administration Tool, click the **Users** branch.

The users list displays in the right pane.

2. Click the name of the user of your choice.

The corresponding management screen displays.

3. Click the **Planner** tab.

By default, the **Server default** option is selected: the server default planner applies and its contents display under the **Timetable** and **Exceptions** tabs, **in read-only mode**.

4. If you do not want to use any planner for this user, select the **None** option: when the user accepts a workflow task, the whole elapsed time will then be taken into account when calculating the deadlines.
5. On the other hand, if you want to define a specific planner for this user, select the **Custom** option: you will then be able to define the contents of this planner under the **Timetable** and **Exceptions** tabs (see [Defining the default planner for the Gargantua server](#)).
6. Whether you have selected the **Server default** or the **Custom** option, if you want to prevent the user to connect to Gargantua when he is not supposed to be working, check the **Prevent login outside of working hours** checkbox.
7. When you are done, click the **Apply** button in the lower left hand corner of the right pane.

The new user planner now appears under the **Planners** branch of the Administration Tool.

DELETING A PLANNER

The default planner for the Gargantua server can never be deleted. On the other hand, all process and user-specific planners disappear as soon as they stop being used.

To delete a custom process or user planner, proceed as follows:

1. In the left pane of the Administration Tool, click the name of the process or user for which you want to delete the planner.

The process or user management screen displays in the right pane.

2. Click the **Planner** tab.
3. Select either the **None** or the **Server default** option.

A confirmation message displays.

4. Click **Yes**.
5. In the lower left hand corner of the right pane, click the **Apply** button.

The custom planner has been successfully deleted: it does not display anymore under the **Planners** branch of the Administration Tool.