

# Checklist: Onboarding Automation Plugin

This checklist helps you successfully implement and use the Redmine Automation Plugin. It is divided into different phases.

## Phase 1: Preparation & Installation

- Check Redmine Version:** Ensure your Redmine installation supports the minimum version required by the plugin. (Check the plugin documentation).
- Download Plugin:** Download the latest version of the Redmine Automation Plugin from the official source.
- Install Plugin:** Install the plugin according to the official installation instructions. Pay attention to all dependencies.
- Activate Plugin:** Activate the plugin in the Redmine administration.
- Check Access Permission:** Ensure users have the necessary permissions to use the plugin functionality.

## Phase 2: Configuration & Testing

- Initial Configuration:** Navigate to the plugin configuration page in the Redmine administration and configure the basic settings.
- Create a Simple Automation Rule:** Create a simple automation rule, e.g., setting a specific ticket tag when a new issue is created.
- Test the Rule:** Activate the automation test rule and run it. Check if it works as expected. Also, check the Redmine log (/log) for any error messages.
- Troubleshooting:** If errors occur, check the message in the Redmine log and try to resolve the error. Use the plugin documentation or contact support if you are unable to resolve it.
- Test Different Scenarios:** Test different conditions and actions with your automation rule. Does it work as planned?
- Reviewing the Triggers:** Ensure the triggers are correctly used to initiate the automated action.
- Reviewing the Conditions:** Ensure that the defined conditions are met to trigger the automated action for the correct entities.
- Reviewing the Actions:** Check if the actions are executed correctly.
- Check Log Files:** Regularly check the plugin's log files for errors or warnings.

## Phase 3: Implementation & Fine-tuning

- Define Use Cases:** Identify the most important use cases for which you want to use the plugin.
- Develop Automation Rules:** Develop detailed automation rules for each use case.
- Testing & Adjustment:** Thoroughly test the developed rules and adjust them as needed.
- Documentation:** Document the developed rules, if necessary.
- Training Other Users:** Train the relevant users in the use of the plugin, if you are sharing the work.
- Monitoring and Maintenance:** Monitor the performance of the automation rules and perform regular maintenance.
- Error Monitoring:** Set up your own queries for the reporting log for potential errors.

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## Phase 4: Continuous Improvement

- Collect Feedback:** Collect feedback from users on the effectiveness of the automation rules.
- Optimize Rules:** Optimize the rules based on feedback and performance monitoring.
- Identify New Use Cases:** Identify further use cases for the plugin.

### Additional Notes:

- Create backups of your Redmine database before installing and configuring the plugin.
- Carefully read the plugin documentation.
- Utilize available resources, such as documentation, blog posts, or support, to clarify questions.
- Exercise caution when handling rules that trigger a delete action. Carefully review these.
- Check that your rules are up to date regularly. New trackers, projects, custom fields, etc. may require an adjustment to the rule conditions.

**This checklist provides a comprehensive overview. The specific steps may vary depending on your requirements and the complexity of your automation processes.**

