

Redmine Automation Plugin

Guide for Admins & Project Manager.
Work smart, not hard.



Redmine Automation Plugin

Across all industries, more and more companies are integrating the possibility of automation into their practice.

This is because it has been shown that automating tasks and business processes not only simplifies day-to-day work, but can also give you a competitive edge.

- Simply by being able to achieve even more with the same number of employees.
- Simply by relieving your employees of tedious, repetitive tasks.

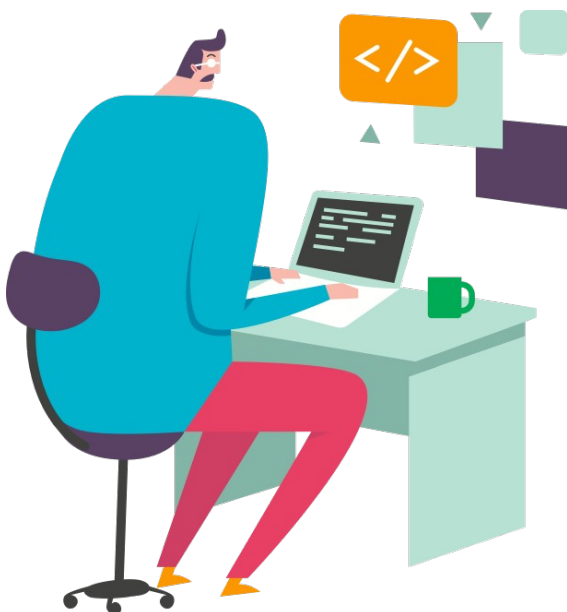


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01

Basics

Improving your team efficiency is easier when you're equipped with the right tools.

The **Redmine Automation Plugin** is such a tool. It makes it as easy as possible to use automation in Redmine. You don't need any developer knowledge and usually you don't have to configure anything on the application server.

It's useful for every company in order to automate routine tasks and optimize existing data sets with the help of rules and schedules

Nevertheless, a few considerations are necessary before starting.



01

Basics

Why Automation?

Across all industries, more and more companies are integrating the possibility of automation into their practice.

This is because it has been shown that automating tasks and business processes not only simplifies day-to-day work, but can also give you a competitive edge.

- Simply by being able to achieve even more with the same number of employees.
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Automation makes team work easier

Getting started in Redmine can be a breeze, but as teams grow and work becomes more complex things might get complicated.

Especially with a predominantly remote workforce.

That's why we put together this little guide full of some best practices on how to get started quick with *Automation in Redmine*.

To help you to get your team back on track and make your job easier by freeing them from the burden of repetitive tasks.

Did you know?

**Simple & repetitive tasks
are the biggest
time sucker and
the biggest risks
in project management.**



01

Basics

Benefits of Automation in Redmine

Take advantage of the head start that automation provides for your project and be one of the first in your industry.

Many companies and teams are not yet prepared for this. Implementing Automation into Redmine help companies in many ways.

- Simple, repetitive tasks can be performed using automation rules. Saves time (both in project management and in the team).
- Simple rules can be used to create a time buffer of as little as one (1) hour for one (1) employee per week.
- with Automation you reduce the risk of having to cancel projects because of increasing reliability.
- with Automation you ensure that task status is continuously kept up to date (employees are only human).
- Maintained tasks make reporting more accurate and easier.

01

Basics

How Automation works

Automations are based on rules, that you have set in the Administration area within the Automation Plugin configuration. Those rules are event-based or time-based.



Trigger

Your support team solves an issue and assigns it to the user.

Triggers may be an event or a time schedule



Condition

There is no feedback or status change for a set period of time.

Conditions are usually available filters (inclusive custom fields)



Action

The issue is automatically closed as solved - Status: Done.

Actions are the result you expect. Like sending mails, close issues, change assignee



Great job!

Enjoy more free time for things you like.

Easy to use no-code rules

01

Basics

Some examples to learn the difference, when to use what rule for.

Event-based trigger

Event-based triggers make sense if you want the automation happen when a specific event took place:

- save process (after creating / updating something (e.g. Issue, Project, Spent time entry etc.)
- login process

Scheduled trigger

Time-based (scheduled) triggers make sense if you want the automation happen when a special time occurs:

- once a month
- every monday
- every first saturday
- daily, weekly, monthly, yearly
- only one time a specific date , etc.

Before you create a rule, you should always consider whether it will be triggered by time or event. The distinction is important. Too many (unnecessary) time-controlled rules can have a negative impact on performance. Event-based ones do not.

02

Best practices: How to deploy automation processes in Redmine

To uncover the automation value, you need to understand how your critical processes are working, where time is being used and where your speedbumps are.

Pitfalls

Where are the risks beyond compliance?

Where do people make a lot of mistakes?

Where do you have gaps in the way the process works due to iterations, errors, or missing pieces of information?

Inefficiency

Where are bottlenecks in the workflow?

What do employees waste most of their time on?

Where should you dig deeper?



02

Best practices

1

Involve your team right from the beginning

Get everyone of the team on board. Gain an understanding of the phases of project management in your company so you know where to apply automation. Brainstorm what would be useful for whom and why. Repeat the process regularly.

2

Answer these questions first:

What are you trying to accomplish? Whom does it help? How often will it be needed?

3

Simplicity is key

No one rule fits all. That's clear. Start with something simple. Easily testable rules. Complexity comes with time.

4

Test, Test, Test...

It cannot be said often enough. Especially when you're not dealing with the issue every day.

5

Time-based or event-based

When should the action take place? When a time event occurs or after an entity is saved?

02

Best practices

6

Resist the urge to add too many rules right from the beginning

Remember rule 3. Less is often more. Complexity comes with time.

7

Continuous Improvement

Continue to improve upon what you have already created. Regular evaluations of implemented rules are recommended.

8

Encourage others

Encourage operations, business, product, HR and marketing teams to investigate automation opportunities for their purpose.

When automating, remember that it is a kind of *activity documentation*. One sets conditions for subsequent generations, to which successors must adhere. The rule ensures that nothing changes in the execution of an activity.

03

Use cases

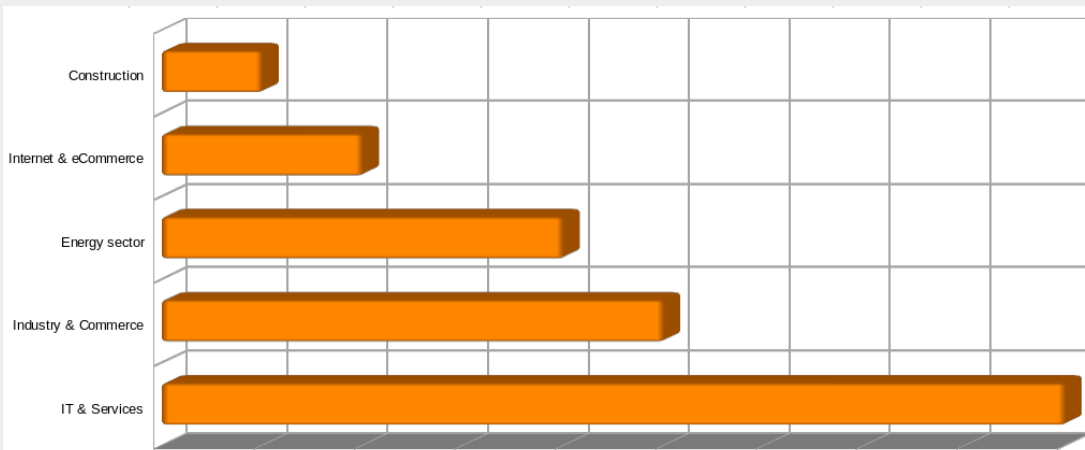
Top 5 industries

The easiest way to reduce repetitive work and create more time slots for your employees is where your team comes centrally together. In Redmine.

From Office Management and HR department to Product Development to Support and Marketing teams, everyone will profit from no-code automation rules.

Our top 5 industries using the Redmine Automation plugin to optimize their workflows are teams in the following sectors:

- IT & Services
- Industry & Commerce
- Energy sector
- Internet & eCommerce
- Construction



Automation in Redmine is time-based or event based. You use it if you want an action to automatically happen according to a timeframe or a special event. This makes automation for many industries an interesting tool for workflow optimization.

03

Use cases

Remote work

Learn how Redmine Automation could improve the work of your remote teams.

- Assign any Redmine users to tasks
- Setting the start and due date of a task
- Adding and removing tags
- Changing issue status or progress
- Adjusting priority
- Auto-Close issues
- Send reminders
- Give automatic feedback
- Fill out specific custom fields
- Create repetitive spent time events on issues
- and much more...



03

Use cases

Project Management

Learn how to simplify the project manager's life with automation:



- Auto-add task notification if specific issue criterias are met.
- Auto-send notification just at the right time in your workflow for any situation in issues or projects.
- Auto-escalate project relevant situations.
- Get informed automatically when specific project situations occur (e.g. budget overrun. delays, missing time estimation etc.).
- Auto-assign specific users to specific tasks.
- Auto-close issues or projects. Say „Thank you“ to the team automatically.
- Not all involved people have access to a project. Auto-inform stakeholders about specific project situations.
- Create repetitive tasks etc.

03

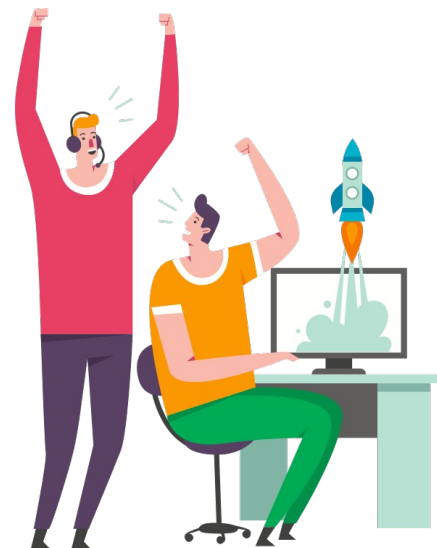
Use cases

Onboarding / Offboarding

Learn how to create a better experience your Redmine users deserve with Automation.

Regardless of whether it is customers, employees or suppliers. It's especially important here, to create consistency and reduce errors.

- Auto-send notification just at the right time to welcome or inform your users or to say „Good bye“.
- Auto-lock specific users.
- Use the possibility to anonymize data
- Observe specified deletion periods
- Send reminders, when you are waiting for something
- and much more...



04

Questions & answers

1

What does the use of Automation mean?

Using automation in Redmine means you replace human intervention with automated workflows. You get rid of repetitive tasks and manual data input, which allows you to minimize errors, save time and because of that, sometimes even money. The Redmine Automation Plugin is a Redmine Add-on. It is fully integrated into Redmine and your workflow.

2

What can Automation do for me?

Automation can replace tedious routines and error-prone processes. Revise, change, remove data without manual intervention, organize tasks and projects automatically and shoot a trigger for a specific process. However, this is only a small part of the plugins' capabilities.

3

How intelligent is the Automation bot?

It is as intelligent as the creator of the rule. The bot performs the task as specified in the rule. If it does not work as desired, this is not due to the bot, but to the fact that the rule does not apply as planned and needs to be revised or re-ordered within the rule list.

04

Questions & answers

4

How long will it take to be up, running and business-ready?

The Automation Plugin is setup by a user with administration permissions. This user probably has a deep knowledge of handling Redmine. If you know how to use the filters and options in Redmine for the various list views (e.g. issue list, project list etc.) then you will quickly find your way around. Because the rules are not based on anything else. A simple rule is created in a few clicks. And to help you get started, you can use predefined rules, as well.

5

Why is it better to use Redmine Automation?

The possibility of automating processes with special software for your company existed many years ago. However, many third-party vendors are priced accordingly and not tailored to Redmine. The time from integration to actual deployment takes correspondingly much longer. Which means that such solutions are rather uninteresting if you need to stay competitive.

With this plugin we help you and your company to automate processes in Redmine directly, without having to acquire any special knowledge. Since you already know how to use Redmine.

Conclusion

Redmine Automation Plugin

Automation has the potential to help businesses of all sizes improve day-to-day processes and gain and maintain an edge over the competitors.

The business benefits that can be achieved through automation are much higher than efficiency through better time management and set correspondingly higher standards for organization.

Change the way you work.

[Get started with Redmine Automation, here.](#)



Support & Training:

- 12 month
- E-Mail support (DE / EN)
- Documentation (DE / EN)
- Online-Training and Ressources