



Cost Transfer – Antura Integration Standard

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Background

Antura offers Antura Integration Standard that enables cost transferring between cost perspectives, like cost transfer in the interface today between cost perspectives. Integration Standard are a kind of add-on products that are continuously updated, in a similar way to Antura, where customers who license them can choose when they want to upgrade to a new version. Unlike custom integrations, Antura Integration Standard are offered to the entire Antura customer base and thus also driven forward by the same.

Technical description

The transfer of costs can be set to start for example, every night, any day of the week (for example every Thursday every third week), any month or any year. The transfer works similarly to "Transfer between different cost perspectives" in Antura. Selection can, for example, be made on all projects that have a certain project model or project type to be included in the integration. It is also possible to choose which period of costs should be included in the integration, more about that in the section "periods".

The integration only runs for those projects that do not have a baseline out for editing. An error report is sent to any recipient that the transfer has not been made for those projects. In connection with the run, the integration can replace the latest baseline or create a new one. If the Integration is to publish a new baseline, it is possible to define what the baseline publish comment should contain.

Selection for the transfer

When the transfer is made, you can choose which projects are to be included in the transfer, it is also possible to set the selection to be made at several levels:

Cost perspective

The selection can be made from any cost perspective to any cost perspective. All cost perspectives are supported.

Project status

Selection is made on which project statuses are to be included in the transfer. At least one status must be selected. The following statuses can be selected: Not Started, Active, On Hold, Cancelled and Finished projects. The transfer will take place regardless of whether the 'Allow editing on completed projects' function setting is active in the completed project or not.

Project model

The selection can be made on a specific project model to be included in the transfer. It is also possible to select multiple project models, separated by commas.

Project type

The selection can be made on a specific project type to be included in the transfer. It is also possible to select multiple project types, separated by commas.

Project property

The selection can be made on a specific project property. The project property type can be Text, List, Numeric or Numeric List

Hourly rate

For resource costs, one of the following hourly rates can be selected: From plan, Standard, Hourly cost 1, Hourly cost 2, Hourly cost 3, or From role.

Periods

The selection of which periods to include in the transfer can be monthly, quarterly, tertial or yearly. You can choose the current period, the previous period, or several periods backwards/forwards. For example, if you have selected monthly as the period and set the integration to run on the 1st of every month, selecting 1 period backwards will transfer the previous month from any cost perspective.

Only periods with amounts

It is possible to select whether to transfer periods that contain amounts or not.

Level of cost input

Regardless of the input level, the cost will be included in the transfer.

Cost input type

Regardless of the input type, the cost will be included in the transfer.

Input period settings

The projects that are to be included in the transfer must have the same input period, and the input periods that can be selected are monthly, quarterly, tertial, or yearly. For example, if you have selected monthly as the input period and a project has a quarterly input period, that project will not be included in the transfer. An error report will be sent out indicating that the project has the wrong input period when the integration is started. The projects that have the correct input period will still be included in the transfer.

Error management

During a transfer, the following report can be sent. The report is sent to one or several predefined email addresses.

Reconciliation report

The report shows which projects have been included in the transfer. If a project has not been included in the transfer, for example, due to having the wrong input period, it will be described in the report.

Configuration

Comment	Value
CronExpression - https://github.com/HangfireIO/Cronos For example the transfer can be done specific dates/day in a month.	@daily (Run once a day at midnight) Or @yearly (Run once a year at midnight of 1 January)
NotificationAddresses – Specify who should be notified for mail reports	
SourceCostPerspective - From which cost perspective we should transfer the costs from	Estimate/budget/actual/forecast/optional perspective
TargetCostPerspective – Which cost perspective we should transfer the cost to	Estimate/budget/actual/forecast/optional perspective
ReplaceExistingBaseline – Replace the current baseline for each project (If false then a new baseline will be created with below comment)	true/false
BaselinePublishComment – Define the comment for the baseline publish	Published by cost transfer integration
TransferOnlyPeriodsWithAmounts – Only transfer cost with amounts	true/false
OnlyTransferResourceEstimates	true/false
CostPeriodizationLevel – Needs to be same for all projects to be included in the transfer	month
NumberOfperiodsOffset – Periods relative today (the day when integration is started), used to calculating start date.	-6
NumberOfPeriods – How many periods that should be included in the transfer	7
HourlyRateActual	FromPlan
HourlyRateEstimate	FromPlan
Projectstatuses – defines what projects that should be included in the transfer of each status (at least one status needs to be set)	Not started, Active, Finished
Projectmodel – Defines what projects that should be included in the transfer for each projectmodel	Kundimplementation,Förvaltning
Project type - Defines what projects that should be included in the transfer for each project type	Ledning, Portfölj
Project properties - Defines what projects that should be included in the transfer for each project properties (text, list, numeric list & numeric)	Kundnummer
Project Property value/values - Defines what projects that should be included in the transfer for each project properties values	1,2

