

Admin Settings – User Manual

Audience: Administrators

Purpose: Configure automated event rules and message templates used across the application.

Contents

- Event Rules
- Message Templates

General UI

- Filters sit on top of each table to narrow results.
 - Actions appear at the right of each row: Preview/Edit/Delete where applicable.
 - System items are read-only; custom items are user-created and editable.
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Event Rules

What it is

- A rule reacts to a system event (e.g., `TASK_CREATED`) and triggers one or more actions.
- System rules are pre-defined and cannot be deleted. Custom rules are created by users.

Key columns

- **Event Type:** Event identifier in UPPER_SNAKE_CASE.
- **Rule Type:** system or custom.
- **Status:** Active/Inactive.
- **Execution:** Where the rule executes (Server/N8N/Both/Auto).
- **Updated:** Last update date.

Filtering

- Rule Type: system/custom.
- Status: Active/Inactive.

- Execution Location: Server/N8N/Both/Auto.
- Search Event Type: substring match in event type.

Create/Edit Rule

1. Click **Create Rule** or **Edit** on a row.

2. Fill fields:

- Event Type (required): UPPER_SNAKE_CASE, e.g., PROJECT_CREATED .
- Rule Enabled: toggle on/off.
- Severity: Important/Critical.
- Priority: Auto, or explicit Critical/High/Normal/Low.
- Execution Location: Server/N8N/Both or Auto.
- Comment: optional description.

3. Actions (at least one required):

- **Notify**
 - Channels: Email/SMS/Push/Webhook/Slack (select one or more).
 - Channel templates (Email/SMS only): choose a message template or use default.
 - Store for dashboard: persist notification metadata for dashboards.
- **Create Report**
 - Period: Daily/Weekly/Monthly/Quarterly/Custom (e.g., P7D).
 - Recipients: select roles to receive the report.
 - Store for dashboard: same as above.
- **Log Only**
 - Store for dashboard: flag only; no outward notification.

4. Conditions (optional, can combine):

- Strict mode: when on, all selected conditions must be met.
- Notify Roles: select roles; set priority (Required/Preferred/Optional).
- Time Conditions: timezone, business-hours/weekdays flags, and time range (start/end).
- Project Conditions: min budget, statuses.
- Task Conditions: statuses and overdue-only flag.

5. Save. Rules require at least one action; otherwise saving is blocked.

Edit/Delete

- Edit: allowed for any rule. For system rules, deletion is disabled.
- Delete: allowed ONLY for custom rules.

Notes

- If a Notify action exists, at least one role must be selected in Notify Roles.
 - Time range defaults to 09:00–17:00 if missing.
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Message Templates

What it is

- Reusable content for notifications (Email/SMS). Attach to Notify actions in Event Rules.

Key columns

- Name
- Category: system/custom (system templates are read-only)
- Type: Email/SMS
- Status: Active/Inactive
- Created: creation date

Filtering

- Category: system/custom
- Type: email/sms

Create/Edit Template

1. Click **Create Template** or **Edit**.
2. Fill fields:
 - Template Name (required)
 - Type (required): Email or SMS
 - Email Subject (required for Email)
 - Template Content (required): supports plain text and HTML; variables as `{{VARIABLE_NAME}}` .
3. Toolbar (Email): basic tags – `strong/em`, `p`, `br`, `h2/h3`, `ul/ol`, `span`, `div`, `a` .
4. Variables: auto-detected; set human-readable labels in the Variables section. Labels are saved with the template.

5. Status: enable/disable the template.
6. Preview: shows rendered HTML (Email) or text (SMS).
7. Save: user-created templates are saved with category `custom`.

Delete

- Allowed ONLY for custom templates; system templates are read-only.

Variables

- Syntax: `{{VARIABLE_NAME}}` (alphanumeric and underscore).
- Examples: `{{PROJECT_NAME}}`, `{{TASK_NAME}}`, `{{ASSIGNEE_NAME}}`, `{{DUE_DATE}}`, `{{CREATED_BY}}`
- On save, variables are included as a map of `{ key: label }`.

Best Practices

- Keep template names descriptive (e.g., "Task Assigned – Email").
- Prefer simple, semantic HTML; a parent email layout will add header/footer.
- Avoid heavy styling; keep content focused.
- Use variables consistently and keep labels readable.

Troubleshooting

- 400 Bad Request: check required fields (Name, Type, Body; Subject for Email). Ensure variable labels are present when variables exist.
- System template not editable: by design. Create a custom template instead.
- Preview shows raw text: ensure Email type and the preview is enabled.

Security

- Do not include inline scripts or untrusted HTML.
- Server must sanitize external values on delivery.