



## Specification Drive | DM Drive | Jobs - Basic Module

Knowledge base article #6266



### Note

For the functionalities described below, the license *Basic Module* is required.  
All jobs can be used both with Drive | DM installations and Drive | DM Cloud.



### Caution

Depending on the amount of data and the frequency a job is running, jobs can cause a high load on the server.

### Drive | DM Workflow Notification Job

This job monitors modifications within workflow statuses and sends email notifications.

Available functions:

- Sending daily workflow overviews
- Options for sending daily workflow overviews:
  - Defining a time for the daily sending of email notifications
  - Defining the tasks to be included in the daily overview (new, claimed but not due, due and overdue)
  - Defining email subject and email text
  - Specifying the users to whom no daily workflow overview is to be sent
- Email notification for changed statuses within the workflows of the respective user
- Options for email notifications for changed statuses within the workflows of the respective user:
  - Specifying the tasks to be monitored (new tasks, due tasks, overdue tasks)
  - Defining email subject and email text
  - Specifying the users not to be notified if workflow statuses change
- Automatic actions if the status of workflow task changes:
  - Specifying the workflow templates and the workflow steps to be monitored
  - Specifying the status changes (new, due, overdue, completed, canceled) of the workflow tasks for which actions are to be performed
    - Email notification (Selection of the user to be notified if workflow statuses do change)
    - Changing space fields if the workflow is related to a space
    - Changing document fields for all documents of a workflow

### Drive | DM LDAP Synchronization Job

This job synchronizes users and groups between an LDAP directory and Drive | DM.

Available functions:

- Specifying LDAP parameters
- Comprehensive synchronization options:
  - Synchronizing users and groups between an LDAP directory and Drive | DM
  - Synchronizing modifications (nice names, email addresses and department of the respective user) made to users from an LDAP directory with users in Drive | DM having the same login name
  - Synchronizing the group assignment from an LDAP directory with Drive | DM allows a central user configuration via LDAP
- Possible email notification after each synchronization containing the following information:
  - All users having been exported to Drive | DM

- All users who could not be exported to Drivve | DM
- All modifications made to those users having been synchronized from an LDAP directory to Drivve | DM

### **Index Export Job**

This job exports index data for spaces, documents or workflows from Drivve | DM into the CSV format.

Possible use case: Further processing by third-party systems or reporting purposes

Available functions:

- Specifying whether index data for spaces, documents or workflows are to be exported
- Defining search conditions for the spaces, documents or workflows to be exported
- Specifying the index fields to be exported
- Selection of field separators for the export file
- Selection of the folder the export file is saved to
- Defining a name for the export file
- Determining whether the file is overwritten with new data or whether the new data is appended within the file
- Possibility to send the export file via email
- Specifying whether new values are assigned to certain fields of the exported data

### **Workflow Trigger Job**

This job starts workflows for documents meeting specified conditions.

Available functions:

- Selection of the workflow template to be used
- Defining search conditions for the selection of documents for workflows are to be started
- Selection of document fields to be used as workflow names
- Determining that only those documents are to be considered having been modified after a configurable date

### **Drivve | DM Retention Time Check Job**

This job deletes documents the retention period of which has expired.

Available functions:

- Verifying the retention periods of documents
- Deleting all documents
  - with an expired retention period
  - for which the period within the recycle bin has been expired
- Email notification on deleted documents
- Automatic start of workflows for documents with an expired retention period
- Automatic modification of index fields for documents with an expired retention period

### **Record Actions Job**

The job executes the following optional actions, if a search condition is met for documents or spaces:

- Send an email with a list of documents or spaces if the search condition is met.
- Update index field values of the matching documents or spaces.

### **DATEV Export Job**

The job exports booking records from Drivve | DM into the DATEV ASCII format.

This file format can be imported again into the DATEV booking software.

Available functions:

- Configuration of the required DATEV properties.
- The export is filtering the records of the current configured fiscal year.
- The exported booking records are set to the status "exported" in Drivve | DM.