

Package: certeprojects (via r-universe)

October 1, 2026

Title A Certe R Package for Department Projects

Version 1.30.14

Description A Certe R Package with functions to automate department projects using MS Teams, MS Planner, Shiny, R Markdown and Quarto. This package is part of the 'certedata' universe.

URL <https://certe-medical-epidemiology.github.io/certeprojects>,
<https://github.com/certe-medical-epidemiology/certeprojects>

Depends R (>= 4.1.0)

Imports certestyle, callr (>= 3.7.0), AzureAuth (>= 1.3.0), AzureGraph (>= 1.3.0), dplyr (>= 1.0.0), httr (>= 1.4.0), jsonlite (>= 1.7.2), knitr (>= 1.40), lubridate (>= 1.9.0), Microsoft365R (>= 2.4.0), miniUI (>= 0.1.1), pins (>= 1.1.0), quarto (>= 1.2.0), rmarkdown (>= 2.29), rstudioapi (>= 0.10), shiny (>= 1.6.0), shinyjs (>= 2.0.0), shinyWidgets (>= 0.6.2), yaml (>= 2.2.0)

Suggests certetoolbox, certemail, cli, clipr (>= 0.8.0), msgxtractr, rlang (>= 1.1.0), rvest, testthat (>= 2.0.0)

License GPL-2

Encoding UTF-8

Roxygen list(markdown = TRUE)

Config/testthat/edition 2

Config/roxygen2/version 8.1.0

Config/pak/sysreqs cmake make libuv1-dev libssl-dev libx11-dev zlib1g-dev

Repository <https://certe-medical-epidemiology.r-universe.dev>

Date/Publication 2026-10-01 09:09:09 UTC

RemoteUrl <https://github.com/certe-medical-epidemiology/certeprojects>

RemoteRef HEAD

RemoteSha 6df224903d098edae5cb584314ce915e866167c4

Contents

connect	2
get_azure_property	4
git_compare	4
pins	5
planner	6
project_consult_add	12
project_properties	13
render	15
schedule_task	16
sharepoint	18
teams	21
validation_authorisation	26
Index	28

connect	<i>Connect to Microsoft 365</i>
---------	---------------------------------

Description

These functions create a connection to Microsoft 365 and saves the connection to the certepackages package environment. The planner_*() and teams_*() functions allow to work with these connections.

Usage

```
get_microsoft365_token(
  scope = read_secret("azure.scope_list"),
  tenant = read_secret("azure.tenant"),
  app_id = read_secret("azure.app_id"),
  auth_type = read_secret("azure.auth_type"),
  R_AZURE_DATA_DIR = NULL,
  ...,
  overwrite = TRUE,
  error_on_fail = TRUE,
  immediate = FALSE
)

connect_outlook(email = read_secret("department.mail"), overwrite = FALSE, ...)

connect_planner(
  plan = read_secret("planner.name"),
  team_name = read_secret("team.name"),
  overwrite = FALSE,
  ...
)
```

```
connect_teams(team_name = read_secret("team.name"), overwrite = FALSE, ...)
```

Arguments

scope	any (combination) of "outlook", "teams", "planner", "tasks" (which is "planner" without group rights), or "sharepoint". Can also be a manual vector of Microsoft Permissions, such as "User.Read".
tenant	the tenant to use, passed on to AzureGraph::create_graph_login()
app_id	the Azure app id to use, passed on to AzureGraph::create_graph_login()
auth_type	the authentication method to use, passed on to AzureGraph::create_graph_login()
R_AZURE_DATA_DIR	the (environment value of the) path to the token file(s), as explained in AzureAuth::AzureR_dir()
...	arguments passed on to get_microsoft365_token()
overwrite	a logical to overwrite an existing connection, useful for switching accounts
error_on_fail	a logical to indicate whether an error must be thrown if no connection can be made
immediate	a logical to not wait 30 seconds before retrying to connect
email	email address of the user, or a shared mailbox
plan	name of the team's plan if team_name is not empty. Otherwise, a plan ID (for individual use).
team_name	name of the team, can be left blank to connect to an individual planner

Details

Microsoft Outlook:

To switch between different Outlook accounts, run [connect_outlook\(\)](#) with another email address, and set `overwrite = TRUE`. This will allow all certemail functions to use the newly set account.

```
# at default connects to the department mailbox:
connect_outlook()
# afterwards, this does nothing since `overwrite` is not set:
connect_outlook("user@certe.nl")
# this switches to the user account:
connect_outlook("user@certe.nl", overwrite = TRUE)
```

Using `overwrite` is needed, because running just [connect_outlook\(\)](#) afterwards again (which many certemail functions do) will otherwise change back to the default account.

Microsoft Planner:

To connect to MS Planner with a personal account, retrieve the plan ID (e.g., from the URL of the plan), and pass it on to [connect_planner\(\)](#) as `plan`, and set `overwrite = TRUE` over replace an existing connection. Make sure that `team_name` is left blank:

```
connect_planner(plan = "AAA-0aa0AaAa-aaaaAAAAAA", team_name = NULL, overwrite = TRUE)
```

Microsoft Teams:

Connecting to MS Teams can only be done on the group (= team) level. It is not possible to set up a connection without a valid team name.

Pre-loaded Settings:

When attaching this certeprojects package using `library()`, and external R process will be run in the background using the callr package to connect to MS Outlook, MS Planner, and MS Teams. This will increase speed when connecting using `connect_outlook()`, `connect_planner()`, or `connect_teams()`.

<code>get_azure_property</code>	<i>Get Azure Property</i>
---------------------------------	---------------------------

Description

This function retrieves a property from an Azure object, such as `ms_plan`, `ms_plan_task`, `ms_team`, `ms_team_member`, `ms_drive_item`.

Usage

```
get_azure_property(x, property)
```

Arguments

<code>x</code>	an Azure object
<code>property</code>	the name of the property, such as "id" or "displayName". This must exist in <code>x</code> or in <code>x\$properties</code> , and will return NA otherwise.

<code>git_compare</code>	<i>Git Compare Files</i>
--------------------------	--------------------------

Description

This compares two text files

Usage

```
git_compare(files = NULL, original_file = NULL)
```

Arguments

<code>files</code>	character vector, allowed to be named
<code>original_file</code>	original file path to restore file to

Description

These functions can be used to work with **pins**, developed by RStudio.

Usage

```
export_pin(
  x,
  name = NULL,
  title = NULL,
  type = NULL,
  description = NULL,
  board = pins_board()
)

import_pin(name, version = NULL, hash = NULL, board = pins_board())

remove_pin(name, version = NULL, board = pins_board())

pins_board(
  projects_channel_id = read_secret("teams.projects.channel_id"),
  account = connect_teams(),
  delete_by_item = TRUE
)
```

Arguments

<code>x</code>	An object (typically a data frame) to pin.
<code>name</code>	Pin name.
<code>title</code>	A title for the pin; most important for shared boards so that others can understand what the pin contains. If omitted, a brief description of the contents will be automatically generated.
<code>type</code>	File type used to save <code>x</code> to disk. Must be one of "csv", "json", "rds", "parquet", "arrow", or "qs". If not supplied, will use JSON for bare lists and RDS for everything else. Be aware that CSV and JSON are plain text formats, while RDS, Parquet, Arrow, and qs are binary formats.
<code>description</code>	A detailed description of the pin contents.
<code>board</code>	A pin board, created by <code>board_folder()</code> , <code>board_connect()</code> , <code>board_url()</code> or another <code>board_</code> function.
<code>version</code>	Retrieve a specific version of a pin. Use <code>pin_versions()</code> to find out which versions are available and when they were created.

hash	Specify a hash to verify that you get exactly the dataset that you expect. You can find the hash of an existing pin by looking for pin_hash in pin_meta() .
projects_channel_id	Teams channel ID of the projects
account	a Microsoft 365 account to use for looking up properties. This has to be an object as returned by connect_teams() or Microsoft365R::get_team() .
delete_by_item	Whether to handle folder deletions on an item-by-item basis, rather than deleting the entire folder at once. You may need to set this to TRUE for a board in Share-Point Online or OneDrive for Business, due to document protection policies that prohibit deleting non-empty folders.

Details

These functions from the [pins](#) package are integrated into the team's Microsoft 365 account, using the "pins" folder in the given MS Teams channel.

For Pins functions of the pins package, use [pins_board\(\)](#) as input, e.g.:

```
pin_list(pins_board())
```

The following pins functions are re-exported by this package: [pin_list\(\)](#), [pin_meta\(\)](#), and [pin_versions\(\)](#).

The [pins_board\(\)](#) function returns a [pins::board_ms365](#) object based on the "pins" folder in the Teams channel *Projects*, which is retrieved with [teams_projects_channel\(\)](#).

planner

Connect to Microsoft Planner via Microsoft 365

Description

These functions use the connection to Microsoft Planner set up with [connect_planner\(\)](#).

Usage

```
planner_browse(account = connect_planner())
```

```
planner_bucket_create(bucket_name, account = connect_planner())
```

```
planner_buckets_list(account = connect_planner(), plain = FALSE)
```

```
planner_task_create(
  title,
  description = NULL,
  startdate = NULL,
  duedate = NULL,
  requested_by = NULL,
```

```
priority = read_secret("planner.default.priority"),
checklist_items = NULL,
categories = NULL,
assigned = NULL,
bucket_name = read_secret("planner.default.bucket"),
attachment_urls = NULL,
account = connect_planner(),
project_number = planner_highest_project_id() + 1,
consult_number = planner_highest_consult_id() + 1
)

planner_create_projecttask(
  project_number,
  title,
  bucket_name = read_secret("planner.default.bucket.projecttask"),
  account = connect_planner(),
  ...
)

planner_checklist_to_projecttasks(
  task,
  bucket_name = read_secret("planner.default.bucket.projecttask"),
  ...
)

planner_task_update(
  task,
  title = NULL,
  description = NULL,
  startdate = NULL,
  duedate = NULL,
  priority = NULL,
  checklist_items = NULL,
  checklist_items_to_check = NULL,
  categories = NULL,
  categories_keep = FALSE,
  assigned = NULL,
  assigned_keep = FALSE,
  bucket_name = NULL,
  percent_completed = NULL,
  attachment_urls = NULL,
  requested_by = NULL,
  preview_type = NULL,
  order_hint = NULL,
  account = connect_planner()
)

planner_tasks_list(
```

```
    account = connect_planner(),
    plain = FALSE,
    include_completed = TRUE
)

planner_task_search(
  search_term = ".*",
  limit = 50,
  include_completed = TRUE,
  include_description = FALSE,
  account = connect_planner()
)

planner_task_find(task, account = connect_planner())

planner_categories_list(account = connect_planner())

planner_retrieve_project_id(task, account = connect_planner())

planner_task_request_validation(
  task,
  attachment_urls = NULL,
  checklist_items = NULL,
  bucket_name = read_secret("planner.validate.bucket"),
  account = connect_planner()
)

planner_task_request_authorisation(
  task,
  category_text = read_secret("planner.label.authorise"),
  bucket_name = read_secret("planner.validate.bucket"),
  account = connect_planner()
)

planner_task_authorise(
  task,
  category_text = read_secret("planner.label.authorised"),
  bucket_name = read_secret("planner.default.bucket.consult"),
  account = connect_planner()
)

planner_move_task(
  current_task_id = project_get_current_id(ask = TRUE),
  account = connect_planner()
)

planner_create_project_from_path(
  path,
```

```

    projects_path = get_projects_path(),
    account = connect_planner(),
    title = basename(path),
    ...
)

planner_user_property(
  user,
  team_name = read_secret("team.name"),
  account = connect_planner(),
  property = "id",
  as_list = FALSE
)

planner_highest_project_id(
  task = read_secret("planner.dummy.project.id"),
  account = connect_planner()
)

planner_highest_consult_id(
  task = read_secret("planner.dummy.consult.id"),
  account = connect_planner()
)

## S3 method for class 'ms_object'
as.data.frame(
  x,
  row.names = NULL,
  optional = FALSE,
  account = connect_planner(),
  ...
)

## S3 method for class 'ms_object'
as_tibble(x, account = connect_planner(), ...)

planner_task_post_message(task, message, account = connect_planner())

```

Arguments

account	a Microsoft 365 account to use for looking up properties. This has to be an object as returned by connect_planner() or via AzureGraph::create_graph_login() \$get_group(name)\$g
bucket_name	name of the bucket
plain	return as plain names, not as Azure objects
title	title of the task
description	a description for the task. A vector of length > 1 will be added as one text separated by white lines.

startdate	a date to use as start date, use FALSE to remove it
duedate	a date to use as due date, use FALSE to remove it
requested_by	name of the person(s) who requested the task, this will be added as first line to description
priority	a priority to set. Can be ranged between 0 (highest) and 10 (lowest), or: "urgent" or "dringend" for 1, "important" or "belangrijk" for 3, "medium" or "gemiddeld" or FALSE for 5, "low" or "laag" for 9. Priorities cannot be removed - the default setting is 5.
checklist_items	character vector of checklist items
categories	names of categories to add, can be multiple, but must exactly match existing category names
assigned	names of members within the plan - use NULL to not add members in planner_task_create() , and use FALSE to remove all existing members in planner_task_update()
attachment_urls	URLs to add as attachment, can be named characters to give the URLs a title. If they are Excel, PowerPoint or Word files, a preview will be shown on the task.
project_number	the new project number to assign. Use NULL or FALSE to not assign a project number. Defaults to the currently highest project ID + 1.
consult_number	the new consult number to assign. Use NULL or FALSE to not assign a consult number. Defaults to the currently highest consult ID + 1.
...	arguments passed on to planner_task_create()
task	any task title, task ID, or ms_plan_task object (e.g. from planner_task_find())
checklist_items_to_check	names/titles of checklist items that need to become checked
categories_keep	add categories that are set in categories instead of replacing them, defaults to FALSE
assigned_keep	add members that are set in assigned instead of replacing them, defaults to FALSE
percent_completed	percentage of task completion between 0-100
preview_type	type of preview - the checkbox on a task card. Can be "automatic", "noPreview", "checklist", "description", "reference". When set to "automatic" the displayed preview is chosen by the app viewing the task.
order_hint	order of the task
include_completed	also search completed tasks
search_term	search term, can contain a regular expression. When searching for project numbers (such as "p201 - Some text", or "p201" or "201"), only titles will be searched for the project number.
limit	maximum number of tasks to show
include_description	also search the description, which requires additional queries and lowers speed

category_text	text of the category to use
current_task_id	Project (p-)number of the project to update
path	location of the folder that has to be converted to a project. This folder will be renamed to contain the new project number.
projects_path	location of the folder that contains all department projects
user	a user name, mail address, or Certe login name
team_name	name of the team, can be left blank to connect to an individual planner
property	property to return, can be "id", "name" or "mail"
as_list	return the full list of members as list , split into Eigenaars (Owners) / Leden (Members). This ignores user.
x	an <code>ms_object</code>
row.names	NULL or a character vector giving the row names for the data frame. Missing values are not allowed.
optional	logical. If TRUE, setting row names and converting column names (to syntactic names: see make.names) is optional. Note that all of R's base package <code>as.data.frame()</code> methods use <code>optional</code> only for column names treatment, basically with the meaning of <code>data.frame(*, check.names = !optional)</code> . See also the <code>make.names</code> argument of the <code>matrix</code> method.
message	character string containing the chat message. Use @Name to mention plan members, where Name is matched against known members via planner_user_property() .

Details

[planner_task_search\(\)](#) searches the title and description using case-insensitive regular expressions and returns an `ms_plan_task` object. In interactive mode and with multiple hits, a menu will be shown to pick from.

[planner_task_find\(\)](#) searches task title or ID, and returns an `ms_plan_task` object. It is used internally by a lot of `planner_*` functions, very fast, and does not support interactive use.

[planner_retrieve_project_id\(\)](#) retrieves the p-number from the task title and returns it as [integer](#).

Use [planner_create_project_from_path\(\)](#) to convert any folder (and any location) to a project folder, by (1) assigning a project number, (2) creating a Planner task and (3) moving the old folder to the department's projects folder.

[planner_highest_project_id\(\)](#) retrieves the currently highest project ID from the dummy project.

[planner_highest_project_id\(\)](#) retrieves the currently highest project ID from the dummy project.

[planner_highest_consult_id\(\)](#) does this for consults.

Using `as.data.frame()` or `as_tibble()` on an `ms_object`, such as `ms_plan_task`, will return the properties and details of the object as a `data.frame`. For transforming many `ms_objects` to a `data.frame`, use `as.data.frame()` or `as_tibble()` in `lapply()` and bind the list of objects together. For example, this retrieves a tibble with the properties and details of all tasks:

```
library(dplyr)
planner_tasks_list() |>
  lapply(as_tibble) |>
  bind_rows()

# also works for other 'ms_object's, such as 'ms_channel':
teams_channels_list(plain = FALSE) |>
  lapply(as_tibble) |>
  bind_rows()
```

[planner_task_post_message\(\)](#) posts a message to the Task Chat of a Planner task (beta Graph API). Any @FirstName LastName pattern in message is resolved to a user mention. Names are matched using [planner_user_property\(\)](#). Unresolved names are kept as plain text with a warning.

project_consult_add *Add Project Or Consult Using Shiny*

Description

This is a Shiny app to add a new project: it creates a project folder locally [or in Teams](#), generates the required Quarto or R Markdown or R file, and creates a [new task in Planner](#). These functions come with RStudio addins to quickly access existing projects. For consults, it only adds a Planner task and creates the card in the background.

Usage

```
project_consult_add(
  planner = connect_planner(),
  teams = if (in_positron()) connect_teams() else NULL,
  channel = if (in_positron()) teams_projects_channel() else NULL,
  outlook = connect_outlook()
)
```

Arguments

planner	Microsoft Planner account, as returned by e.g. connect_planner()
teams	Microsoft Teams account, as returned by e.g. connect_teams()
channel	Microsoft Teams Channel folder, as returned by e.g. teams_projects_channel()
outlook	Microsoft Outlook account, as returned by e.g. connect_outlook()

project_properties	<i>Project Properties</i>
--------------------	---------------------------

Description

Retrieve project properties, such as the title, folder location and project number. It retrieves folder and file info from SharePoint, by using [teams_get_project_folders\(\)](#)

Usage

```
project_get_current_id(ask = NULL, account = connect_teams())

project_identifier(project_number = project_get_current_id())

project_get_folder(
  project_number = project_get_current_id(),
  account = connect_teams()
)

project_get_title(
  project_number = project_get_current_id(),
  account = connect_teams()
)

project_get_file(
  filename = ".*",
  project_number = project_get_current_id(),
  fixed = FALSE,
  account = connect_teams()
)

project_set_file(
  filename,
  project_number = project_get_current_id(),
  account = connect_teams()
)

project_set_folder(
  foldername,
  project_number = project_get_current_id(),
  account = connect_teams()
)

project_open_analysis_file(
  project_number = project_get_current_id(ask = TRUE),
  account = connect_teams()
)
```

```

project_open_folder(
  project_number = project_get_current_id(ask = TRUE),
  account = connect_teams()
)

project_add_qmd_skeleton(
  filename = NULL,
  project_number = project_get_current_id(),
  account = connect_planner()
)

get_output_folder(
  project_number = project_get_current_id(),
  account = connect_teams()
)

get_output_folder_consult()

```

Arguments

ask	logical to indicate whether the project number should always be asked. The default, NULL, will show a popup in interactive R sessions, allowing to search for projects. In non-interactive sessions, such as in Quarto and R Markdown, it will use the current working directory to determine the project number.
account	a Microsoft 365 account to use for looking up properties. This has to be an object as returned by connect_teams() or Microsoft365R::get_team() .
project_number	Planner project number
filename	name for the new Quarto file
fixed	logical to turn off regular expressions
foldername	foldername to set

Details

[project_get_current_id\(\)](#) uses [planner_task_search\(\)](#) to find a specific project based on any search string.

[project_identifier\(\)](#) generates the project identifier for print on reports and in mails: a combination of the currently logged in user (in your case: 'root'), the current date/time (format: YYMMDDHHMM), and the project number. If the project number is not available, it will only return the current user and date/time (format: YYMMDDHHMM).

[project_get_file\(\)](#) searches the SharePoint project folders. If filename is matched, it will return that file. Otherwise, it will use [regex](#) to find matching files.

[project_set_folder\(\)](#) will create the folder if it does not exist.

[project_add_qmd_skeleton\(\)](#) initializes a new Quarto skeleton for a project.

Examples

```
project_identifier(123)
```

render

Knit R Markdown or Quarto Document

Description

Runs input files through Quarto or RMarkdown, and allows Quarto to work with full paths (where Quarto itself requires relative paths). This function essentially replaces both `rmarkdown::render()` and `quarto::quarto_render()`.

Usage

```
render(input_file, output_file = NULL, quiet = FALSE, ...)
```

```
knit(input_file, output_file = NULL, quiet = FALSE, ...)
```

```
render_sharepoint(
  input_file = NULL,
  output_file = NULL,
  project_number = project_get_current_id(),
  full_sharepoint_path = NULL,
  quiet = FALSE,
  account = connect_teams(),
  output_folder = get_output_folder(project_number = project_number, account = account),
  upload = FALSE,
  ...
)
```

Arguments

<code>input_file</code>	file to be rendered, can be R Markdown (.Rmd) or Quarto (.qmd), or a lot of other formats such as .md, .ipynb and many other formats that Quarto supports .
<code>output_file</code>	Base name for single-file output (e.g. PDF, ePub, MS Word). This sets the output-file Quarto metadata. If NULL, the output filename will be based on the input filename.
<code>quiet</code>	Suppress warning and other messages, from R and also Quarto CLI (i.e --quiet is passed as command line). quarto.quiet R option or R_QUARTO_QUIET environment variable can be used to globally override a function call (This can be useful to debug tool that calls quarto_* functions directly). On Github Actions, it will always be quiet = FALSE.
<code>...</code>	arguments passed on to <code>render()</code>
<code>project_number</code>	Planner project number

full_sharepoint_path	Full path of the remote file, consisting of the project folder and the file name, such as "Project - p123/my_file.R".
account	a Microsoft 365 account to use for looking up properties. This has to be an object as returned by <code>connect_teams()</code> or <code>Microsoft365R::get_team()</code> .
output_folder	any output folder of the resulting output file, defaults to <code>get_output_folder()</code> . Can also be "sharepoint", which sets <code>upload = TRUE</code> .
upload	whether to upload the resulting output file back to SharePoint, default is <code>FALSE</code> .

Details

Functions `knit()` and `render()` are identical.

Any Quarto file (.qmd) will be rendered using `quarto::quarto_render()`. Any RMarkdown file (.Rmd) will be rendered using `rmarkdown::render()`.

`render_sharepoint()` downloads a SharePoint project file to a local temporary folder, then renders it. Either `input_file + project_number` or `full_sharepoint_path` must be given.

Value

As opposed to `quarto::quarto_render()`, which always returns `NULL`, this `render()` function always returns the output file name (invisibly).

schedule_task	<i>Schedule Task (CRON-like)</i>
---------------	----------------------------------

Description

This will `source` a project R file, or `render` any other project file, if time and user requirements are met using a CRON-like syntax (<https://cron.help>).

Usage

```
schedule_task(
  minute,
  hour,
  day,
  month,
  weekday,
  users,
  file,
  project_number = NULL,
  log = TRUE,
  ref_time = Sys.time(),
  account = connect_teams(),
  check_mail = length(users) > 1,
  check_log = length(users) > 1,
```

```

    sent_delay = 15,
    sent_account = connect_outlook(),
    sent_to = read_secret("mail.error_to"),
    log_folder = read_secret("projects.log_path")
)

```

Arguments

minute	one or more values between 0-59, or . or "*" (or NULL or left blank) for each minute
hour	one or more values between 0-23, or . or "*" (or NULL or left blank) for each hour
day	one or more values between 1-31, or . or "*" (or NULL or left blank) for each day
month	one or more values between 1-12, or . or "*" (or NULL or left blank) for each month
weekday	one or more values between 0-7 (Sunday is both 0 and 7; Monday is 1), or . or "*" (or NULL or left blank) for each weekday
users	logged in users, must correspond with <code>Sys.info()["user"]</code> . Currently logged in user is "root". This must be length > 1 if <code>check_mail</code> is TRUE.
file	file name, supports regular expression if <code>project_number</code> is set.
project_number	number of the project, must be numeric and exist in <code>planner_tasks_list()</code> . Can be NULL to use any existing file set in file.
log	a logical to indicate whether this message should be printed: <i>Running scheduled task at...</i>
ref_time	time to use for reference, defaults to <code>Sys.time()</code>
account	Teams account
check_mail	a logical to indicate whether a project was sent by a previous user, by running <code>certemail::mail_is_sent()</code>
check_log	a logical to indicate whether a log file exist for the project from a previous user
sent_delay	delay in minutes. This will be multiplied by the position of the current user in users minus 1. For example, when <code>sent_delay = 15</code> , this will be 15 for user 2, and 30 for user 3.
sent_account	Outlook account, to search sent mails
sent_to	users to send error mail to
log_folder	path that contains log files

Details

For Windows, the Task Scheduler must be set up to use this function. Most convenient is to:

1. Create an R file such as `R_cron.R` containing calls to `schedule_task()`
2. Create a batch file such as `R_cron.bat` that runs `R_cron.R` with `R CMD BATCH`
3. Set up a Windows Task Scheduler task that runs `R_cron.bat` every minute

For macOS and Linux, use the crontab to run the commands with Rscript:

```
* * * * Rscript -e 'certeprojects::schedule_task(users = "user", file = "file every minute.R", project_
0 7 * * * Rscript -e 'certeprojects::schedule_task(users = "user", file = "file at 7 AM.R", project_numbe
```

Examples

```
something_to_run <- function() {
  1 + 1
}

# units:      M H d m wd
schedule_task(., ., ., ., ., "user", "file", 123) # every minute
schedule_task(0, ., ., ., ., "user", "file", 123) # start of each hour
schedule_task(0, 7, ., ., ., "user", "file", 123) # everyday at 7h00
schedule_task(0, 7, 1, ., ., "user", "file", 123) # first day of month at 7h00
schedule_task(0, 7, ., 2, ., "user", "file", 123) # everyday day in February at 7h00
schedule_task(0, 7, ., ., 1, "user", "file", 123) # every Monday at 7h00
schedule_task(0, 7, 1, 2, ., "user", "file", 123) # every 1st of February at 7h00
schedule_task(0, 7, ., 2, 1, "user", "file", 123) # every Monday in February at 7h00
schedule_task(0, 7, 1, 2, 1, "user", "file", 123) # each February 1st if it's a Monday at 7h00
schedule_task(0, 7, 29, 2, ., "user", "file", 123) # once every 4 years at 7h00

# examples of combinations

# everyday at 7h00 and 7h30
schedule_task(c(0, 30), 7, ., ., ., "user", "file", 123)
# everyday at 7h00 and 15h00
schedule_task(0, c(7, 15), ., ., ., "user", "file", 123)
# everyday at 7h00 and 7h30 and 15h00 and 15h30
schedule_task(c(0, 30), c(7, 15), ., ., ., "user", "file", 123)
# every second Monday of the month at 7h00:
schedule_task(0, 7, c(8:14), ., 1, "user", "file", 123)
# every 15th of April at 8h30 and 16h30:
schedule_task(30, c(8, 16), 15, 4, ., "user", "file", 123)
# once per quarter at 8h00 on the first day of the month:
schedule_task(0, 8, 1, c(1, 4, 7, 10), ., "user", "file", 123)

# fall-back for failed jobs

# this will run at 8h00 if current user is "user1"
schedule_task(0, 8, ., ., ., c("user1", "user2"), "file", 123)
# it will run again at default 15 minutes later (so, 8h15), if:
# - current user is "user2"
# - project 123 has no mail in Sent Items or log of "user1" contains errors
```

Description

These functions allow for fast and easy transfer between local files and SharePoint, using [teams_projects_channel\(\)](#) to retrieve the Projects channel.

Usage

```
download_from_sharepoint(  
  remote_file_name = NULL,  
  project_number = project_get_current_id(),  
  full_sharepoint_path = NULL,  
  account = connect_teams(),  
  overwrite = TRUE  
)  
  
upload_to_sharepoint(  
  local_file_name = NULL,  
  remote_file_name = NULL,  
  project_number = project_get_current_id(),  
  full_sharepoint_path = NULL,  
  account = connect_teams()  
)  
  
source_sharepoint(  
  remote_file_name = NULL,  
  project_number = project_get_current_id(),  
  full_sharepoint_path = NULL,  
  account = connect_teams(),  
  ...  
)  
  
download_file_to_sharepoint(  
  url,  
  local_file_name = NULL,  
  project_number = project_get_current_id(),  
  full_sharepoint_path = NULL,  
  account = connect_teams(),  
  ...  
)
```

Arguments

<code>remote_file_name</code>	Name of the file to search, will be used together with <code>project_number</code> and can be a regular expression. Will be passed on to project_get_file() .
<code>project_number</code>	Planner project number
<code>full_sharepoint_path</code>	Full path of the remote file, consisting of the project folder and the file name, such as "Project - p123/my_file.R".

account	a Microsoft 365 account to use for looking up properties. This has to be an object as returned by <code>connect_teams()</code> or <code>Microsoft365R::get_team()</code> .
overwrite	Whether to overwrite an existing file.
local_file_name	File name of the local file.
...	arguments passed on to <code>source()</code> or <code>download.file()</code>
url	URL to download and afterwards upload to SharePoint

Details

You must either provide `remote_file_name + project_number`, or provide `full_sharepoint_path`.

- `download_from_sharepoint()` finds a SharePoint file in the [Projects channel](#) using `project_get_file()`, and downloads it to a local temporary folder. The local filename is returned and can be used in other functions.
- `upload_to_sharepoint()` uploads any local file to SharePoint in the [Projects channel](#). The remote path is returned and can be used in other functions.
- `source_sharepoint()` runs `source()` on a SharePoint project file, by downloading it to a temporary folder first using `download_from_sharepoint()`.
- `download_file_to_sharepoint()` downloads a remote URL and then uploads the downloaded file to SharePoint using `upload_to_sharepoint()`

Examples

```
## Not run:

source_sharepoint("my_file.R", 123)

"my_file.R" |>
  download_from_sharepoint(project_number = 123) |>
  source_sharepoint()

url <- "https://examplefile.com/file-download/26"
from_internet <- download_file_to_sharepoint(url,
                                              "test-download.pdf",
                                              project_number = 123)

from_internet
#> [1] "Testproject - p123/test-download.pdf"

local_file <- download_from_sharepoint(full_sharepoint_path = from_internet)

## End(Not run)
```

teams

Connect to Microsoft Teams via Microsoft 365

Description

These functions use the connection to Microsoft Teams set up with [connect_teams\(\)](#).

Usage

```
teams_projects_channel(  
  projects_channel_id = read_secret("teams.projects.channel_id"),  
  projects_folder_id = read_secret("teams.projects.folder_id"),  
  overwrite = FALSE,  
  account = connect_teams()  
)  
  
teams_get_project_folders(  
  projects_channel_id = read_secret("teams.projects.channel_id"),  
  account = connect_teams()  
)  
  
teams_new_project(  
  task,  
  channel = teams_projects_channel(),  
  planner = connect_planner()  
)  
  
teams_browse_project(  
  task,  
  channel = teams_projects_channel(),  
  planner = connect_planner()  
)  
  
teams_list_project_files(  
  task,  
  channel = teams_projects_channel(),  
  planner = connect_planner()  
)  
  
teams_download_project_file(  
  file,  
  task,  
  channel = teams_projects_channel(),  
  planner = connect_planner()  
)  
  
teams_get_project_file(  
  task,  
  channel = teams_projects_channel(),  
  planner = connect_planner()  
)
```

```
    file,
    task,
    channel = teams_projects_channel(),
    planner = connect_planner()
)

teams_open_project_analysis_file(
    task,
    channel = teams_projects_channel(),
    planner = connect_planner()
)

teams_render_project_file(
    file,
    task,
    output_file = NULL,
    fun = rmarkdown::render,
    ...,
    channel = teams_projects_channel(),
    planner = connect_planner()
)

teams_view_project_file(
    file,
    task,
    channel = teams_projects_channel(),
    planner = connect_planner()
)

teams_upload_project_file(
    files,
    task,
    channel = teams_projects_channel(),
    planner = connect_planner()
)

teams_download_file(
    full_teams_path = NULL,
    account = connect_teams(),
    destination_dir = getwd(),
    overwrite = FALSE
)

teams_download_folder(
    full_teams_path = NULL,
    account = connect_teams(),
    destination_dir = getwd(),
    recursive = TRUE,
```

```
        overwrite = FALSE
    )

teams_upload_file(
    file_path,
    full_teams_path = NULL,
    account = connect_teams(),
    file_name = NULL
)

teams_upload_folder(
    folder_path,
    full_teams_path = NULL,
    account = connect_teams(),
    recursive = TRUE
)

pick_teams_item(
    full_teams_path = NULL,
    account = connect_teams(),
    only_folders = FALSE
)

teams_name(account = connect_teams())

teams_channels_list(account = connect_teams(), plain = TRUE)

teams_view_sharepoint(channel, account = connect_teams())

teams_send_message(
    body,
    channel,
    content_type = c("text", "html"),
    attachments = NULL,
    account = connect_teams()
)

teams_open(teams_path, channel = NULL, account = connect_teams())

teams_get_link(
    teams_path,
    share_type = c("view", "edit"),
    expire_after = "1 month",
    password = NULL,
    channel = NULL,
    account = connect_teams()
)
```

Arguments

projects_channel_id	Teams channel ID of the projects
projects_folder_id	Teams folder ID within the Teams channel
overwrite	a logical to overwrite an existing connection, useful for switching accounts
account	a Microsoft 365 account to use for looking up properties. This has to be an object as returned by <code>connect_teams()</code> or <code>Microsoft365R::get_team()</code> .
task	any task title, task ID, or <code>ms_plan_task</code> object (e.g. from <code>planner_task_find()</code>)
channel	a Teams folder object. This has to be an object as returned by <code>teams_projects_channel()</code> .
planner	a Microsoft 365 account for Planner. This has to be an object as returned by <code>connect_planner()</code> .
file	the file name to open
output_file	path of the output file
fun	function to use for rendering. Can be e.g. <code>rmarkdown::render</code> or <code>quarto::quarto_render</code> .
...	arguments passed on to fun
files	the files to upload
full_teams_path	a full path in Teams, including the Team name and the channel name . Leave blank to use interactive mode, which allows file/folder picking from a list in the console.
destination_dir	a folder to download the file or folder to, defaults to the current working directory.
recursive	download/upload all files within the folder
file_path	local path of the file to upload. Can also be an R object to save it as RDS to Teams.
file_name	a file name to use if <code>file_path</code> is an R object
folder_path	local path of the folder to upload
only_folders	only show folders, not files
plain	return as plain names, not as Azure objects
body	text of the message
content_type	type of content, must be "text" or "html"
attachments	vector of file locations of attachments to add to the message
teams_path	file location in Microsoft Teams, may also contain the channel name if channel is NULL, e.g., <code>teams_path = "channel name/test.xlsx"</code>
share_type	type of share, must be "view" (default) or "edit"
expire_after	time span after which the share link expires, defaults to "1 month", can also be e.g. "7 days"
password	password to set for share link, defaults to blank

Details

The `teams_new_project()` function:

1. Checks if there is a Planner task with the correct task title
2. Creates a new folder in Teams in the projects channel
3. Updates the task to contain the project folder URL as an attachment

The `teams_download_project_file()` function will download the given project file to a temporary location, and will return the path of this location. This makes it possible to use `source()`, `rmarkdown::render()` or `quarto::quarto_render()` using the `teams_download_project_file()` function as input.

The `teams_render_project_file()` function allows to render a Teams file. It downloads the Teams file using `teams_download_project_file()`, runs the rendering function set in `fun`, and uploads the resulting output file back to Teams using the same file name a file, but with the new file extension (such as pdf, html, or docx). It **invisibly returns** the temporary local file location, so that the output of `teams_render_project_file()` can be given to e.g. `certemail::mail()` as an attachment.

The `teams_download_file()` and `teams_download_folder()` functions use `pick_teams_item()` to select a file or folder, after which they will be downloaded to the destination folder.

The `teams_upload_file()` and `teams_upload_folder()` functions use `pick_teams_item()` to select the destination folder on Teams. **Notice** that these upload functions have not overwrite argument - Microsoft365R does not support them since overwrite means that a new file version will be created on Teams.

The `pick_teams_item()` function provides an interactive way to select a file in any Team, any channel. It returns a list with the properties `group_id`, `is_private`, `channel_id`, `item_id`, `item_name`, `item_path`, and `full_path` of the Team item.

`teams_send_message()` can also take a `data.frame`, which will be converted to HTML with `plain_html_table()`. If the input is a vector length > 1, the input will be collapsed with linebreaks.

Examples

```
## Not run:
# PROJECT-RELATED -----

# Project-related Teams function rely on existing Planner tasks.

# create a new project, which will be a folder in the Teams channel
# for this, the task 'My Planner task' must already exist
teams_new_project("My Planner task")

# the task 'My Planner task' will now contain the URL to the project

# upload a file there
teams_upload_project_file("analysis.Rmd", "My Planner task")

# render R markdown or Quarto from and to the cloud
teams_render_project_file("analysis.Rmd", "My Planner task")
# this will put the output file in the same Teams folder as 'analysis.Rmd'
```

```

teams_open("test.xlsx", "My Channel")
teams_open("my channel/test.xlsx") # shorter version, tries to find channel

# PROJECT-UNRELATED -----

# by not specifying a remote location, a file picker will show in the console:
teams_download_file()
teams_download_folder("MyTeamName/MyChannelName/MySubFolder/")

teams_upload_file("myfile.docx", full_teams_path = "MyTeamName/MyChannelName/MySubFolder/")

# also supports data frames, they will be saved as RDS
mtcars |>
  teams_upload_file("MyTeamName/MyChannelName/MySubFolder/")

## End(Not run)

```

validation_authorisation

Validation and Authorisation

Description

These functions handle validation and authorisation of files stored on a SharePoint site via the Microsoft Graph API, updating corresponding metadata fields and optionally interacting with Microsoft Planner for workflow management.

Usage

```

validate_request_file(
  drive_item,
  local_file = NULL,
  planner = connect_planner()
)

validate_file(
  drive_item,
  user = Sys.info()["user"],
  authorise_request = FALSE,
  teams = connect_teams(),
  planner = connect_planner()
)

authorise_file(
  drive_item,
  user = Sys.info()["user"],

```

```
teams = connect_teams(),  
planner = connect_planner()  
)
```

Arguments

drive_item	a Drive Item object of a file
local_file	a location of the local file. If set, this will allow a direct Positron link on the attachment of the Planner task.
planner	a Planner account, e.g. outcome of connect_planner()
user	a Cert user, who is member of the SharePoint site where file is stored
authorise_request	option to request for authorisation after validation
teams	a Teams account, e.g. outcome of connect_teams()

Details

The functions in this set operate on Microsoft 365 Drive Items (class `ms_drive_item`) and are designed to work within a controlled document workflow involving SharePoint and Planner:

- `validate_request_file()` creates a label on a Planner task requesting validation for a file.
- `validate_file()` writes a timestamp and user ID to the file's metadata to record validation, using the authenticated Teams token. If `authorise_request = TRUE`, it also triggers a request for authorisation by labelling a task in Planner associated with the parent folder of the file.
- `authorise_file()` writes a timestamp and user ID to the file's metadata to reflect authorisation of the file. It also labels the associated Planner task to indicate successful authorisation.

All API calls use the Microsoft Graph API and require appropriate OAuth tokens via Teams or Planner accounts. The structure assumes SharePoint lists are configured with custom metadata columns for validation and authorisation tracking.

Index

`as.data.frame()`, 11
`as.data.frame.ms_object (planner)`, 6
`as_tibble()`, 11
`as_tibble.ms_object (planner)`, 6
`authorise_file`
 (validation_authorisation), 26
`AzureAuth::AzureR_dir()`, 3
`AzureGraph::create_graph_login()`, 3, 9

`board_connect()`, 5
`board_folder()`, 5
`board_url()`, 5

`certemail::mail()`, 25
`certemail::mail_is_sent()`, 17
`connect`, 2
`connect_outlook (connect)`, 2
`connect_outlook()`, 3, 4, 12
`connect_planner (connect)`, 2
`connect_planner()`, 3, 4, 6, 9, 12, 24, 27
`connect_teams (connect)`, 2
`connect_teams()`, 4, 6, 12, 14, 16, 20, 21, 24, 27

`data.frame`, 11, 25
`download.file()`, 20
`download_file_to_sharepoint`
 (sharepoint), 18
`download_from_sharepoint (sharepoint)`, 18

`export_pin (pins)`, 5

`get_azure_property`, 4
`get_microsoft365_token (connect)`, 2
`get_microsoft365_token()`, 3
`get_output_folder (project_properties)`, 13
`get_output_folder()`, 16
`get_output_folder_consult`
 (project_properties), 13

`git_compare`, 4

`import_pin (pins)`, 5
`integer`, 11
`interactive`, 14

`knit (render)`, 15
`knit()`, 16

`lapply()`, 11
`library()`, 4
`list`, 11
`logical`, 3, 14, 17, 24

`make.names`, 11
`Microsoft365R::get_team()`, 6, 14, 16, 20, 24

`ms_drive_item`, 4
`ms_plan`, 4
`ms_plan_task`, 4, 10, 11, 24
`ms_team`, 4
`ms_team_member`, 4

`new task in Planner`, 12

`or in Teams`, 12

`pick_teams_item (teams)`, 21
`pick_teams_item()`, 25
`pin_list()`, 6
`pin_meta()`, 6
`pin_versions()`, 5, 6
`pins`, 5
`pins::board_ms365`, 6
`pins_board (pins)`, 5
`pins_board()`, 6
`plain_html_table()`, 25
`planner`, 6
`planner_browse (planner)`, 6
`planner_bucket_create (planner)`, 6
`planner_buckets_list (planner)`, 6

planner_categories_list(planner), 6
 planner_checklist_to_projecttasks
 (planner), 6
 planner_create_project_from_path
 (planner), 6
 planner_create_project_from_path(), 11
 planner_create_projecttask(planner), 6
 planner_highest_consult_id(planner), 6
 planner_highest_consult_id(), 11
 planner_highest_project_id(planner), 6
 planner_highest_project_id(), 11
 planner_move_task(planner), 6
 planner_retrieve_project_id(planner), 6
 planner_retrieve_project_id(), 11
 planner_task_authorise(planner), 6
 planner_task_create(planner), 6
 planner_task_create(), 10
 planner_task_find(planner), 6
 planner_task_find(), 10, 11, 24
 planner_task_post_message(planner), 6
 planner_task_post_message(), 12
 planner_task_request_authorisation
 (planner), 6
 planner_task_request_validation
 (planner), 6
 planner_task_search(planner), 6
 planner_task_search(), 11, 14
 planner_task_update(planner), 6
 planner_task_update(), 10
 planner_tasks_list(planner), 6
 planner_tasks_list(), 17
 planner_user_property(planner), 6
 planner_user_property(), 11, 12
 project_add_qmd_skeleton
 (project_properties), 13
 project_add_qmd_skeleton(), 14
 project_consult_add, 12
 project_get_current_id
 (project_properties), 13
 project_get_current_id(), 14
 project_get_file(project_properties),
 13
 project_get_file(), 14, 19, 20
 project_get_folder
 (project_properties), 13
 project_get_title(project_properties),
 13
 project_identifier
 (project_properties), 13
 project_identifier(), 14
 project_open_analysis_file
 (project_properties), 13
 project_open_folder
 (project_properties), 13
 project_properties, 13
 project_set_file(project_properties),
 13
 project_set_folder
 (project_properties), 13
 project_set_folder(), 14
 Projects channel, 20

 quarto::quarto_render, 24
 quarto::quarto_render(), 15, 16, 25

 regex, 14
 remove_pin(pins), 5
 render, 15, 16
 render(), 15, 16
 render_sharepoint(render), 15
 render_sharepoint(), 16
 rmarkdown::render, 24
 rmarkdown::render(), 15, 16, 25

 schedule_task, 16
 schedule_task(), 17
 sharepoint, 18
 source, 16
 source(), 20, 25
 source_sharepoint(sharepoint), 18
 Sys.time(), 17

 teams, 21
 teams_browse_project(teams), 21
 teams_channels_list(teams), 21
 teams_download_file(teams), 21
 teams_download_file(), 25
 teams_download_folder(teams), 21
 teams_download_folder(), 25
 teams_download_project_file(teams), 21
 teams_download_project_file(), 25
 teams_get_link(teams), 21
 teams_get_project_file(teams), 21
 teams_get_project_folders(teams), 21
 teams_get_project_folders(), 13
 teams_list_project_files(teams), 21
 teams_name(teams), 21

- teams_new_project (teams), [21](#)
- teams_new_project(), [25](#)
- teams_open (teams), [21](#)
- teams_open_project_analysis_file
 (teams), [21](#)
- teams_projects_channel (teams), [21](#)
- teams_projects_channel(), [6](#), [12](#), [19](#), [24](#)
- teams_render_project_file (teams), [21](#)
- teams_render_project_file(), [25](#)
- teams_send_message (teams), [21](#)
- teams_send_message(), [25](#)
- teams_upload_file (teams), [21](#)
- teams_upload_file(), [25](#)
- teams_upload_folder (teams), [21](#)
- teams_upload_folder(), [25](#)
- teams_upload_project_file (teams), [21](#)
- teams_view_project_file (teams), [21](#)
- teams_view_sharepoint (teams), [21](#)

- upload_to_sharepoint (sharepoint), [18](#)

- validate_file
 (validation_authorisation), [26](#)
- validate_request_file
 (validation_authorisation), [26](#)
- validation_authorisation, [26](#)

- working directory, [14](#)