d.velop

d.ecs task: Administrator
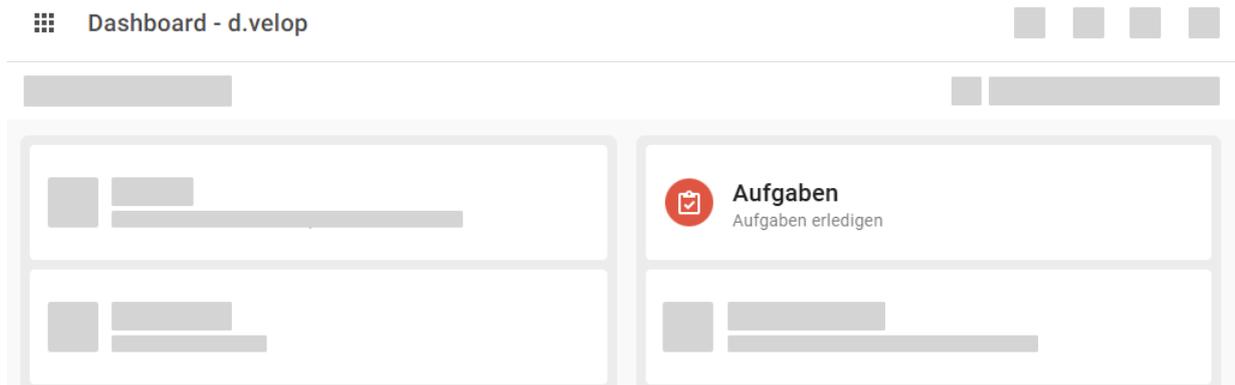
Table of Contents

1. d.ecs task: Administrator

1.1. Basic information on the application

In this chapter, you can find notes on the product and general information.

1.1.1. About d.ecs task

d.ecs task is an application for managing tasks.

Using context actions, you can create new tasks and complete tasks, among other things.

You have different options for creating tasks: You can create tasks automatically using an interface or manually. In addition to the subject and the recipient of a task, you can choose to specify additional properties such as the context, priority, a due date or a reminder date. Moreover, you can create a task based on a document in a result list and add the document as an attachment to the task.

You can forward a task to other persons or groups and mark it as read or unread.

In the context of workflows, for example, tasks are delivered automatically. For tasks in workflows, the default view for the editing of tasks is replaced by a specific editing dialog for the respective workflow step.

In a task list, you can view all tasks sent to you or to a group you are a member of. You can sort and filter a task list by different criteria. An advanced list allows you to view tasks that have been taken on by other people. In this special view, tasks can be returned to the original recipients.

1.2. Installation and uninstallation

You can find information on the installation of d.ecs task in this section.

1.2.1. System requirements

Please refer to the central system requirements for d.velop products (on-premises). You can find deviating or more extensive system requirements in this documentation.

The application requires a JDBC driver for the communication with the DBMS.

For Microsoft SQL Server the JDBC driver is included in d.ecs task.

For Oracle Database the JDBC driver is not provided by d.velop AG. Use a JDBC driver type 4, compiled for Java version 11, to ensure the communication with the DBMS. If you use an older version of the database for which no corresponding JDBC driver version for Java version 11 is available, use a driver that is compiled for Java version 8 or higher.

1.2.2. Installation of d.ecs task

You install the software exclusively with d.velop software manager. If an application is required for different products, the corresponding software packages are also installed automatically.

For further information on installing the software, see the d.velop software manager manual.

1.2.3. Installation of updates for d.ecs task

If you already have an older version of the application installed, you can use d.velop software manager to update it. Since d.ecs task was not installed with d.velop software manager until version 1.4.0, you first have to add d.ecs task as a new product in d.velop software manager when updating from version 1.4.0 (or earlier). The data of your previous installation is tranferred automatically.

After installing the updates, you may have to adjust the database configuration.

This is how it works

1. Install or update d.ecs task with d.velop software manager.
2. Open the feature **Configuration** on the start page of the application.
3. Select **Tasks and processes > Tasks > Database**.
4. Select **Upload driver** optionally to update the JDBC driver. If this button is not available, the database driver was transferred automatically. Continue with the next step.
5. Select **Update structure** optionally, to update the database structure. If this button is not available, updating the database structure is not needed. In this case, updating is completed.
6. Restart d.ecs task if you had to update the database structure.

When updating from an older version, please also note the following important notes.

Updating a cluster installation

If you use multiple instances of the application, you need to ensure that all instances are updated with the same configuration. Install updates for your cluster installation by switching off all instances except for one, and first only update this instance. Then, execute the setup wizard on all other instances.

Update to version 1.2.0

After you have updated the application, you have to perform the following configuration.

Updating the system user

As of version 1.2, d.ecs task uses an own secure authentication key for the communication with other apps. A system user is therefore no longer needed. If your system user has been configured with a user name and a password, no action is required. If you update d.ecs task from version 1.1 and have configured an API key for the system user, you have to remove the API key now.

This is how it works

1. Open the feature **Configuration** on the start page of the application after having finished the setup wizard.
2. Select the entry **System user** in the **Tasks** section.
3. Click on **Remove API key**.

Update to version 1.3.0

Please note the following steps when updating to version 1.3.0:

Additional database permissions

In version 1.3, the administrative database user requires additional permissions. Before updating the database structure, make sure that this user has permission to create views.

Microsoft SQL Server JDBC driver

As of version 1.3, you can no longer provide your own JDBC driver for Microsoft SQL Server. Version 8.2 of the driver is automatically installed by the setup.

Update to version 1.4.0

No additional steps are necessary after updating the application.

Update to version 1.5.0

No additional steps are necessary after updating the application.

Update to version 1.6.0

No additional steps are necessary after updating the application.

Update to version 1.7.0

No additional steps are necessary after updating the application.

1.2.4. Uninstalling d.ecs task

The software you installed using d.velop software manager can only be uninstalled with d.velop software manager. If the software to be uninstalled has dependencies with other software packages, you must resolve these conflicts accordingly.

For further information on uninstallation, see the d.velop software manager manual.

1.2.5. Sharing the standard port for d.ecs task

- By default, the port for d.ecs task is determined dynamically. However, you can also specify a port.

1.3. Configuring d.ecs task

You can find information on the configuration of d.ecs task in this section.

1.3.1. Configuring the database

You need a database for the application. It is assumed that you have already created a database for the application to save data in. In addition, two users are required so that the application can log into the database. For all Unicode characters to be processed correctly, ensure that you set the sorting accordingly when creating the database schema.

To configure the database, proceed as follows.

This is how it works

1. Select the feature **Configuration**.
2. Select the entry **Database** in the **Task settings** section.
3. Enter the connection data.
4. Select **Save configuration**.
5. Restart the application.

> **Note**
>
> For Microsoft SQL Server the JDBC driver is included in d.ecs task.
>
> If you use a different database, you need a JDBC driver that meets the system requirements. An appropriate JDBC driver is needed to communicate with the database management system.

1.3.2. Using a Microsoft SQL Server database

Please note the following for the use and configuration of a Microsoft SQL Server database:

- To establish a connection with the database, please enable the TCP/IP protocol for the SQL server.
- The tables are created in the default schema of the administrative database user.
- The administrative user must be authorized to create tables, views and indexes in his/her default schema.
- The runtime user must use the same default schema as the administrative user.
- In this schema, the runtime user needs the permissions **SELECT**, **INSERT**, **UPDATE** and **DELETE**.
- The two switches **ALLOW_SNAPSHOT_ISOLATION** and **READ_COMMITTED_SNAPSHOT** must be configured in the database with the value **ON**.

1.3.3. Using an Oracle database

Please note the following for the use and configuration of an Oracle database:

- The administrative user requires the permissions **CREATE TABLE, CREATE VIEW** and **CREATE SES-SION**. The tables, views and indexes are created in the schema and in the default tablespace of this user. The user needs the appropriate quota for the tablespace.
- To establish a connection with the database, a Net Listener with TCP protocol is required. Enter the port of the Listener under **Port** .
- Under **Database name** enter the service name or the SID. This name must be available on the Net Listener.
- The user names are case sensitive.
- The runtime user requires the permission **CREATE SESSION**.
- The runtime user will be assigned the permissions **SELECT**, **INSERT**, **UPDATE** and **DELETE** for the tables in the schema of the administrative user.

1.3.4. Setting up user roles

You can use the entry **User roles** in the feature **Configuration** to assign a user role to users or groups. The user groups allow you to assign certain permissions for working with tasks to the current user.

You can assign the following roles to users:

- **Administrator**: The user has permission to query tasks of other users and to forward tasks to other users. This user also has permission to set up responsibility and delegation rules.
- **System user**: The user is eligible to update task details via API and to create tasks in the name of other users.

If you want to assign a role to a user, simply enter the user name in the appropriate field and select him/her.

By default, both roles are assigned to the **GlobalAdminGroup** user after installation. You can customize the user roles according to your infrastructure.

1.3.5. Setting up a cluster

To install multiple instances of the application in a cluster, you need to ensure that all instances use the same configuration. To ensure this, a jStore with a cluster configuration must exist on each system on which the application is to be installed. This way, the installations register with the same d.ecs http gateway.

You also need to ensure that the database configuration is the same for all installations.

This is how it works

1. Terminate all instances of the application except for one. This way, you ensure that exactly one instance is configured.

2. Configure the database for the application.
3. Now, start the configured instance again to apply the changes.
4. Copy the files **conf\task-app-db.properties** and **lib\ta-jdbc-*.jar** in the installation directory of this instance.
5. Paste these files into the installation directory of all other instances of the application.
6. Now, start all instances.

You can also follow this procedure if you want to apply a change of the connection data for the database.

1.3.6. Managing the context action for creating a task for a document

The entry **Advanced administration** in the feature **Configuration** allows you to configure the context actions for creating tasks for a document as well as showing tasks for a document.

You can determine the visibility of the context actions in JSON format under **Conditions for the DMS context actions**. You can find further information on the activation conditions in the API documentation of the DMSApp.

1.3.7. Enabling sharing of task lists

You can enable sharing of task lists so that users can share their personal task lists with other users.

This is how it works

1. Select the feature **Configuration**.
2. Navigate to **Tasks and processes > Tasks > Advanced administration**.
3. Activate the **Enable task list sharing** checkbox.
4. Save your change.

Users can now share their task lists with other users.

> **Note**
>
> For more information, see "Releasing the task list for other users" in the documentation "d.ecs task: User" in the d.velop service portal: https://help.d-velop.de/docs/en/pub/task-user/latest/additional-functions-and-settings/releasing-the-task-list-for-other-users.

If you subsequently disable sharing of task lists again, all the sharing configured by all users up to that point is deleted.

1.3.8. Configuring events

You can activate events for task integration in d.velop process studio. This allows you to trigger an automated process if a task is created, changed, completed or deleted.

This is how it works

1. On your d.velop documents start page, go to **Configuration > Tasks and processes > Tasks > Advanced administration**.
2. Under **Events**, activate all the events you want to use in d.velop process studio.
3. Save your change.

The activated events are now available in d.velop process studio.

1.3.9. Restricting the group type for task management

You can adjust the group type for task management. For group types that were configured already, only groups with this group type are available in the following scenarios:

- Creating or forwarding a task

- Defining a delegate for a delegate rule
- Defining a responsible person for a delegate rule
- Share task list

This is how it works

1. On your d.velop documents start page, go to **Configuration > Tasks and processes > Tasks > Advanced administration**.
2. Select the relevant group type under **Group types**.
3. Save your change.

1.4. Tips and tricks
You can find out more about tips on functions and tips for making your work easier in this section.

1.4.1. Configuring notifications
You can enable the sending of notifications to notify users of newly received tasks or to remind users of an existing task.

This is how it works

1. Select the feature **Configuration**.
2. Select the entry **Notifications** in the **Task settings** section.
3. **Enable sending notifications**.
4. Optionally, select the desired language in which the notifications should be sent.
5. Select **HTML** or **Text** as format for e-mail notifications.
6. Confirm the configuration with **Save**.

1.4.2. Setting up HTTPS
You can encrypt the communication between d.ecs http gateway and the application using HTTPS.

This is how it works

1. Create a P12 file with the name **keystore.p12** in the configuration dossier of the installation directory of the application (\conf\keystore.p12).
2. Optionally, create the file **appconfiguration.properties** in the same directory if it does not exist already.
3. Add the following lines to the file:
   keystorePass=password_of_keystore
   keyAlias=alias_of_certificate (optional, if only one alias exists in the keystore, this is applied automatically)
4. Restart the application to complete the setup.

1.5. Frequently asked questions
In this section, you can find answers to frequently asked questions.

1.5.1. How can I change the host name and the port?
The local computer name and a randomly chosen port are normally used to register the application on the d.ecs http gateway.

If you want to change this data, you can specify the changes in a configuration file. The file can be found under <installation directory of the application>\conf\appconfiguration.properties. If the file **appconfiguration.properties** does not exist, you can copy the file **appconfiguration.properties.template** in the same directory and adjust the extension.

You can enter the properties **port** and **serverName** in the file.

```
serverName=myhost.mydomain
port=8087
```

After applying a change, you need to restart the application for the changes to take effect.

1.5.2. Why is the loading indicator displayed for so long when the database configuration is saved?

When the database configuration is saved, it may occur that the loading indicator is displayed for several minutes. If this is the case, you maybe have not entered the data correctly during the configuration. You need to delete the configuration data for the database connection manually and reenter it.

How it works:

1. Exit the application via the Windows service manager.
2. Delete the file **task-app-db.properties** in the **conf** directory under the default installation directory.
3. Start the application via the Windows service manager.
4. Configure the database connection in the feature **Configuration**.
5. Restart the application via the Windows service manager.

1.5.3. How do I update the JDBC driver of the database?

When an update of the database used is available, you may need to update the JDBC driver.

This is how it works

1. End the service of the application.
2. Open the **lib** folder in the default installation directory of the application.
3. Delete the file **ta-jdbc-***.jar** (the asterisks are placeholders for the extension specific to the database management system).
4. Restart the service of the application.
5. Go to **Configuration** > **Tasks** > **Database**.
6. Click **Upload driver** and select the JAR file.
7. Restart the application.

> **Note**
> Use a JDBC driver that meets the system requirements. An appropriate JDBC driver is needed to communicate with the database management system.

1.5.4. How do I change the base address of the client?

d.ecs task generates URLs e.g. for notifications that can be opened by a client (e.g. web browser). The URLs start with the base address of the system.

You can specify an alternate base address for the URL in a configuration file if needed. The file can be found under <installation directory of the application>\conf\appconfiguration.properties\.

You can enter the property **clientBaseUri** in the file.

```
clientBaseUri=https://myhost.mydomain
```

After applying a change, you need to restart the application for the changes to take effect.

1.6. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.