d.velop

d.ecs task: User

Table of Contents

1. d.ecs task: User

1.1. Basic information on the application

This chapter contains product notes and general information.

1.1.1. About d.ecs task

d.ecs task is an application for the management of 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 via the user interface. Apart from the subject and the recipient of a task, you can optionally predefine additional properties such as the context, the priority, the due date or the reminder date. Moreover, you can create a task based on a document in a result list so that you can 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 task list allows you to view tasks assumed by other recipients. In this special view, tasks can be returned to the previous group of recipients.

1.2. Getting started

In this topic, you can learn about the basic functions of the application.

1.2.1. Creating a task for a document

You can create a task based on a document in order to automatically add the document to the task as an attachment. Creating a task for a document can be helpful if you want to have a document checked by an employee, for example.

This is how it works

1. Open the document, e.g. from the list of search results.
2. Select **Create task for document**.
3. Enter one or multiple recipients.
4. Optionally, select **Deliver individual task to every assignee** to assign a separate task to each assignee if there are multiple assignees.
5. You also have the option to enter advanced properties.

If you create the task for one or more employees, it is helpful to specify advanced properties for editing the task. For example, you can enter a description to give your employees more detailed information about the task.

1.2.2. Finding a task

When working with tasks, you have the option of limiting your task list to specific results. This enables you to reduce the task list to the results which are important for the completion of your tasks.

The application supports your task search with the following options:

- **Filtering recipient lists**: You can limit the displayed tasks by selecting task recipients. You can choose between the items **Sent to me**, **Sent to me and others** and the name of any group of which you are a member.
- **Searching for contents**: To filter the task list by contents, enter a keyword in the input field and confirm your input. The search includes the properties **Subject**, **Sender**, **Context** and task-specific metadata.
- **Sorting the task list**: You can sort the task list by applying the filters **Received**, **Subject**, **Sender**, **Priority** or **Due**. You can also use the sorting order button to reverse the order of the list of results.

1.2.3. Forwarding a task to another user

Situations may arise in which you want to forward one of your tasks to a co-worker. Let's assume you opened the attachment of a task and found out that you are not the recipient for the document. You have the option of forwarding the task to another user.

This is how it works

1. Select the task in the task list.
2. Select **Forward**.
3. Enter the name of the user in the input field and select him/her.
4. Optionally, enter a comment for forwarding.
5. Select **Forward**.

1.2.4. Withdrawing a task already edited by another user

Tasks can be sent to multiple recipients or groups. In addition, multiple users can have access to a task, e.g. due to delegations or the release of task lists. However, a task sent to multiple users can only be edited by one user at a time. If a task you have to edit is already being edited by another user, you can withdraw the editing from the current user.

This is how it works

1. Select the three dots (**More actions**) and click **Show tasks processed by other recipients**. You will now find tasks in the task list that are currently being processed by other users.
2. Select the respective task.
3. Select **Withdraw task**.

You are now the assignee of the task yourself.

1.3. Additional functions and settings

You can find additional functions supporting you during day-to-day work with the application in this section.

1.3.1. Forwarding a task already adopted by another user

If you have been assigned the **Administrator** role, you can forward tasks that are personally addressed to one user to another user.

This is how it works

1. Choose **Show task list of another user > Administer task lists**.
2. Enter the name of the user whose task list you want to view and confirm your selection with **OK**.
3. Select the task you want to forward.
4. Select **Forward**.
5. Enter the name of the user you want to forward the task to.
6. Optionally, enter a comment for forwarding.
7. Select **Forward**.

1.3.2. Adding responsibility rules

You can specify a responsible person for individual task types to keep track of things when working in a team. The person responsible for a task type can view all tasks of a context and can forward them to other users if necessary.

You can use the property **Context** to specify a permission for task contexts. You can use metadata to further refine the permission. You can only access the internal metadata of the task. Additional information from other systems (as e.g. document properties) is not available. You can only add responsibility rules for tasks which have been created via API.

To be able to add permissions for task contexts, you need to have been assigned the **Administrator** user role.

Let’s assume you want to create a permission for employees in the accounting department who are responsible for all tasks with the context **Invoice**.

This is how it works

1. Open the **Configuration feature**.
2. Under **Task settings**, select the entry **Responsibility rules**.
3. Add a new entry.
4. Use a unique name for the task type, e.g. “Invoice”.
5. Select the **Context** property and enter **Invoice** as the comparison value.
6. You also have the option of adding conditions that the tasks must fulfill. For example, you can enter the metadata “Location” and the comparison value “Berlin” to limit the permission to invoices for this location.
7. Confirm the dialog.
8. Under **Responsible users**, enter the persons or groups you want to give permission.
9. Save your changes.

The permitted users can now select the “Invoice” task list.

1.3.3. Forwarding tasks in one’s area of responsibility

When you are responsible for a type of task, you can also see tasks which are currently edited by other people. You can only see the tasks for which you have permission. You have the option of forwarding the tasks in your area of responsibility to other users.

This is how it works

1. Select the task type under **My tasks** > **My responsibility** to view the tasks in your area of responsibility.
2. Select the desired task in the task list.
3. Optionally, enter a comment for forwarding.
4. Use **Forward** to forward the task to another person or group.

1.3.4. Useful information about task lists

When working with tasks, you can select different task lists. Using different task lists enables you to always find the exact tasks you need to complete your work. Which task lists are available to you will depend on whether you are a member of a group and whether you are responsible for certain task types. The **My tasks** task list is selected by default.

You can select other task lists from the drop-down list. The task lists are grouped according to the groups available to you, your activities and the tasks you are responsible for.

Available groups

The child task lists contain all tasks for which you are entered as recipient. You can select between the following task lists:

- **My tasks:** This task list contains all tasks that have been sent to you.
- **Sent to me**: This task list contains all tasks that were sent only to you.
- **Sent to me and others**: This task list contains all tasks that were sent to you and other users.
- **My planned tasks:** The task list contains all tasks that are already planned for you and will be sent to you in the future.

If you are a member of a group, you can also select a task list with the same name as the group. A separate task list is displayed for each group. This task list contains all tasks sent to the particular group.

My activities

When you complete or forward a task from your personal task list, it no longer appears in your task list. If you still want to keep track of these tasks, you can use the child task lists for created, forwarded and completed tasks:

- **My created tasks:** This task list contains all tasks that you created.
- **My forwarded tasks:** This task list contains all tasks that you have forwarded.
- **My completed tasks:** This task list contains all tasks that you have completed. Completed tasks are displayed only until the end of their retention period.

My responsibility

If you are responsible for a specific task type, you can select an additional task list for this task type. Which tasks are displayed in this list is determined by the responsibility rules. The name of the task list is the same as the name of the corresponding rule.

1.3.5. Standing in for a user

When working in teams, it can be useful to appoint a delegate for tasks delivered solely to you. If you were specified as a delegate by another user, you can stand in for this user and manage their tasks. You can display the user's task list when they have registered as absent.

Let's assume you have a colleague named Martin Bauer who has named you as his delegate. He registered as absent, and now you want to manage his tasks.

This is how it works

1. Open your task list.
2. Click **Show task list of another user**.
3. Select Martin Bauer from the **Delegate for** menu to view all tasks that were sent to him as the sole recipient.
4. Select a task to display it.

You can now complete the task yourself or forward it to another person.

1.3.6. Setting up delegate rules for certain task types

You can specify a default delegate for your tasks for when you register as absent. Your default delegate can manage all your tasks by default.

However, there may be situations in which you want to specify a different user as your delegate for certain task types. Specifying another user as your delegate can be useful if you want the user to stand in for all tasks with the context "Invoice", for example.

If you have been assigned the **Administrator** user role, you can define delegate rules that allow users to specify one additional delegate per delegate rule.

Let's assume you want to create a delegate rule for all tasks with the context "Invoice".

This is how it works

1. Open the **Configuration** feature.
2. Under **Task settings**, select the entry **Delegation rules**.
3. Add a new entry.
4. Use a unique name for the task type, e.g. "Invoice".
5. Select the **Context** property and enter **Invoice** as the comparison value.
6. You also have the option of adding further conditions that the tasks must fulfill. For example, you can enter the metadata "Location" and the comparison value "Berlin" to limit the delegate rule to invoices for this location.
7. Confirm the dialog.
8. Save your changes.

All users now have the option to configure a specific delegate for this delegate rule.

1.3.7. Defining a delegate for certain task types

In your profile, you can specify a default delegate who can manage your tasks while you are absent. Your default delegate can manage all your tasks by default.

In your organization, there may be task types that are always handled by a particular user. In this case, you have the option of specifying a user other than your default delegate for certain task types. To be able to specify a different user, your administrator must have already created a delegate rule for the task type.

Let's assume you want to specify a user other than your default delegate for tasks of the "Invoice" type. Your administrator has already created a delegate rule called "Invoice" for this task type.

This is how it works

1. Open the **Configuration** feature.
2. Under **Task settings**, select the entry **Manage delegates**.
3. For the "Invoice" delegate rule, enter a user to stand in for you under **Delegate**.
4. Save your changes.

If you enter nothing for a task type, your default delegate will manage these tasks.

1.3.8. Excluding delegation for certain task types

In your absence, your delegate can manage your tasks. If you do not want tasks of a certain type to be viewed or edited by your delegates, you can exclude these task types from delegation using a delegate rule. These task types can then no longer be managed by any other user.

If a task meets the criteria for excluding delegation, it can never be viewed or edited by a delegate. Even if another delegate rule would allow this type of task to be managed, the delegation exclusion overrides this other rule.

If you have been assigned the **Administrator** user role, you can exclude certain task types from the delegation.

Let's assume you want to exclude all tasks with the context "HR" from delegation.

This is how it works

1. Open the **Configuration** feature.
2. Under **Task settings**, select the entry **Delegation rules**.
3. Add a new entry.

4. Use a unique name for the task type, e.g. “HR”.
5. Select the **Context** property and enter **HR** as the comparison value.
6. You also have the option of adding further conditions that the tasks must fulfill. For example, you can enter the metadata “Location” and the comparison value “Berlin” to limit the delegation exclusion to HR processes for this location.
7. Confirm the dialog.
8. Disable the **Delegation possible** option so that delegation is prohibited for this rule.
9. Save your changes.

Tasks of this type can now no longer be delegated.

1.3.9. Releasing the task list for other users

When working as part of a team, it can be helpful to share your personal tasks with other team members. If your administration has enabled sharing task lists, you can share your tasks with any number of users and groups.

This is how it works

1. Open the **Configuration feature**.
2. Navigate to **Tasks and processes > Tasks > Additional options**.
3. Choose the entry **Share task lists** in the **Task settings** area.
4. Enter the persons or groups with whom you want to share your personal task list.
5. Save your changes.

All the entered users and groups can now view and edit your tasks.

1.3.10. Editing a shared task

While working as part of a team, you can use the function for sharing your task list to enable all the team members to access your tasks. If a team member shares his or her task list with you, you can display and edit those released tasks at any time.

Let's assume you have a colleague called Martin Bauer who has released his personal task list for you. You want to edit his tasks.

This is how it works

1. Open your task list.
2. Click **Show task list of another user**.
3. In the menu, select **Shared task list of Martin Bauer** to view all the tasks that were sent to him as the sole recipient.
4. Select a task to display it.

You can now complete the task yourself or forward it to another person.

1.3.11. Creating planned tasks

Planned tasks are tasks that you plan to do in the future. When you create a planned task, you define a time in the future when the task will be delivered to recipients.

This is how it works

1. Open your task list.
2. Click **New task**.
3. Enter a subject.
4. Enter one or multiple recipients.
5. In the advanced properties under **Delivery**, define a delivery time for the planned task.
6. You also have the option to enter additional properties.

7. Click **Create task**.

Before the defined delivery time, recipients see planned tasks in the **My planned tasks** list. From the defined delivery time, planned tasks automatically appear in the recipients' task list. Recipients are only notified of the receipt of planned tasks from the delivery time onward.

Alternately, you can create planned tasks via API using the parameter **receiveDate**. For more information, see the API documentation for d.ecs task.

1.3.12. Adding comments to tasks

You can add comments to tasks. You can find the comments on a task in the **Comments** perspective.

This is how it works

1. In the corresponding task, switch to **Comments**.
2. Enter your comment in the **Comment** field.
3. Click on **Submit comment**.

Alternatively, you can add comments when forwarding a task, see Forwarding a task to another user. If a task has been forwarded to you with a comment, you will find the comment in the task under **Details**.

> **Note**
> A maximum of 100 comments are stored for each task. If the limit of 100 comments is exceeded for a task, the oldest comment is discarded. When the retention period of a task ends, the comments on the task are also discarded.

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. Show tasks for a document

When working with documents, it can be helpful if you can get information on already existing tasks for documents. In the detail view of a document, you can open a summary of all tasks existing for this document using the context action **Tasks for the document**.

This task overview and the displayed properties help you to recognize if a document is already checked by another colleague, for example.

1.5. Frequently asked questions

You can find answers to frequently asked questions in this section.

1.5.1. How can I view the task list of other users?

You can view the task lists of other users if you have been assigned the **Administrator** role. To view the tasks of another user, choose **Show task list of another user > Administer task lists** and then enter the name of the user.

1.5.2. How long are completed tasks kept?

When you complete a task, it is automatically deleted after a certain time. By default, tasks are retained for 30 days after completion.

In the task details, the **End of retention period** property tells you when a task will be deleted.

1.5.3. What is the purpose of the perspective "Process"?

If your task is part of a digital business process, you can see the **Process** perspective in the task details. This perspective gives you an overview of the process history so far. You can see e.g. who started the process and which tasks have already been completed or forwarded. If a process protocol exists for the process, you can still see the perspective after completing or forwarding your task.

1.5.4. How do I reset the display in the table view?

In the table view, you can reset the table columns shown and the width of the table columns to their default settings.

This is how it works

1. Click **Additional settings and actions**.
2. Click **Reset current view**.

1.5.5. How can I show and hide table columns?

You can show and hide individual table columns in the table view.

This is how it works

1. Click any cell in the header row of the table.
2. Click the three horizontal bars in the cell or press **CTRL+Enter**.
3. In the menu, go to the tab with the nine dots.
4. Select the table columns you want to display. Deselect the table columns you want to hide.

1.5.6. Why do some table rows have a document symbol in the title?

In addition to the common properties of a task, the table view also displays information about attached documents. If tasks are linked with documents from d.velop documents, a document symbol appears in the task title.

You can display all the common and advanced document properties from d.velop documents. When there are multiple values, only the first value is displayed. If you do not want to display any properties from d.velop documents, you can deactivate the properties.

This is how it works

1. Click **Additional settings and actions**.
2. Click **Show document properties** to switch the display of document properties on and off.

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.