d.ecs task: User

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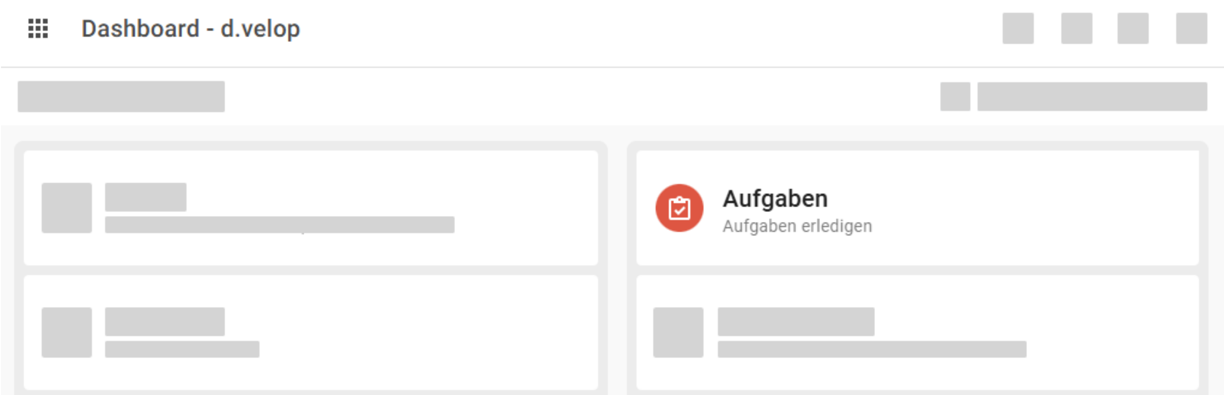
1. d.ecs task: User

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 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. Getting started

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

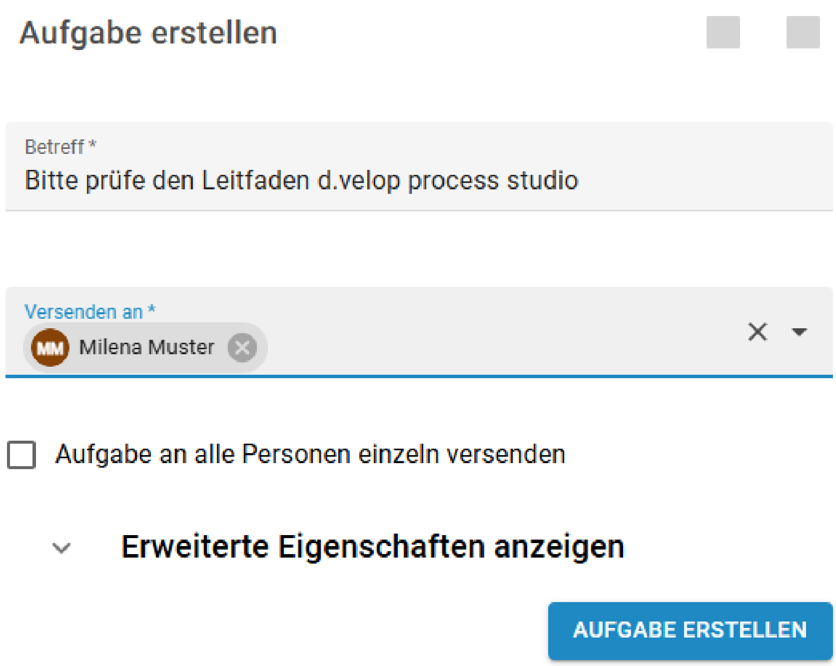
1.2.1. Creating a task for a document

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 a team member, 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 more people or groups.
4. Optionally, select **Send task to every person individually** to assign a separate task to each person if there are multiple recipients.

5. You can also enter advanced properties if you wish.
6. Click **Create task**.



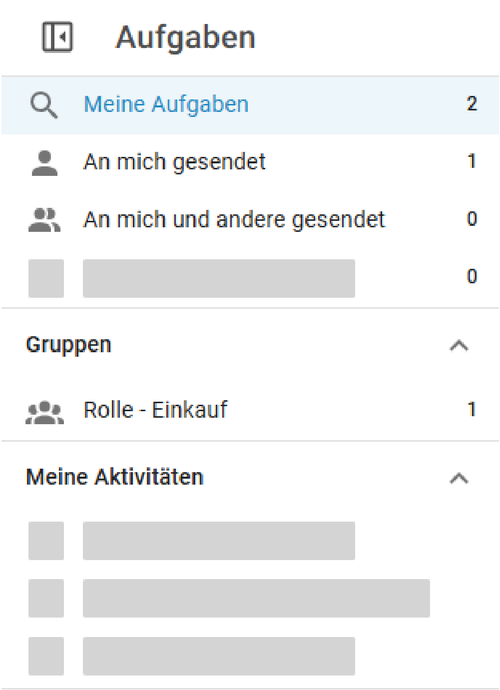
If you create the task for one or more people, it is helpful to specify advanced properties for editing the task. For example, you can enter a description to give your employees more detailed information about the task.

1.2.2. Finding a task

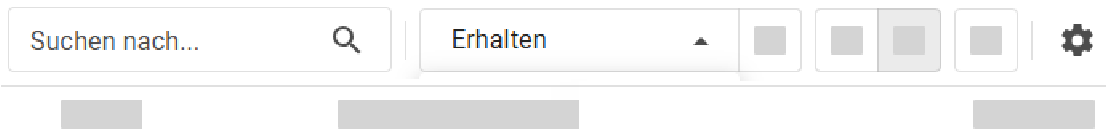
When working with tasks, you can limit your task list to specific results. This enables you to restrict the task list to the results that are important for the completion of your tasks.

The application supports your task search with the following options:

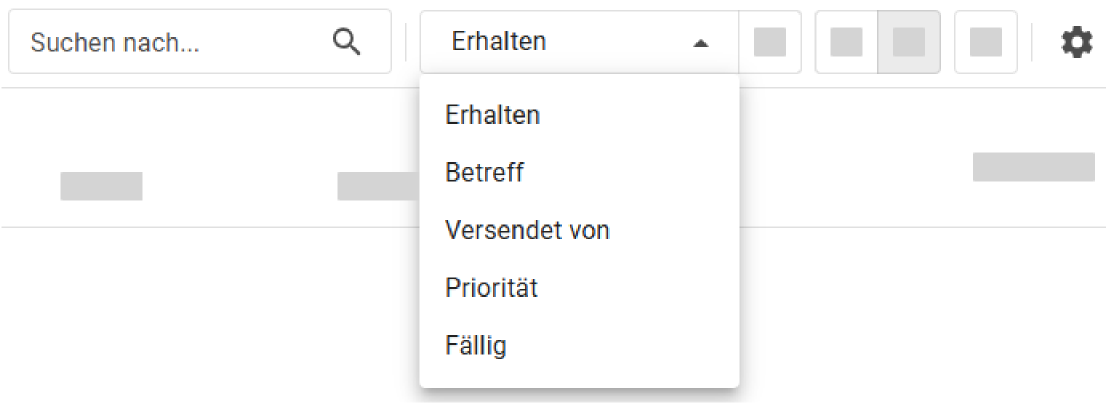
- **Different task lists**: You can limit the tasks displayed by selecting the relevant people. You can choose between the items **Sent to me**, **Sent to me and others** and the name of any group of which you are a member. In addition, planned tasks – that is, tasks with a delivery date in the future – are displayed only under **My planned tasks**.



- **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**, **Sent by**, **Context** and task-specific additional data.



- **Sorting the task list**: You can sort the task list by applying the filters **Received**, **Subject**, **Sent by**, **Priority** or **Due**. You can also reverse the sort order of the result list. If you are using the table view rather than the list view, you can sort the task overview by clicking on the header of the corresponding table row.



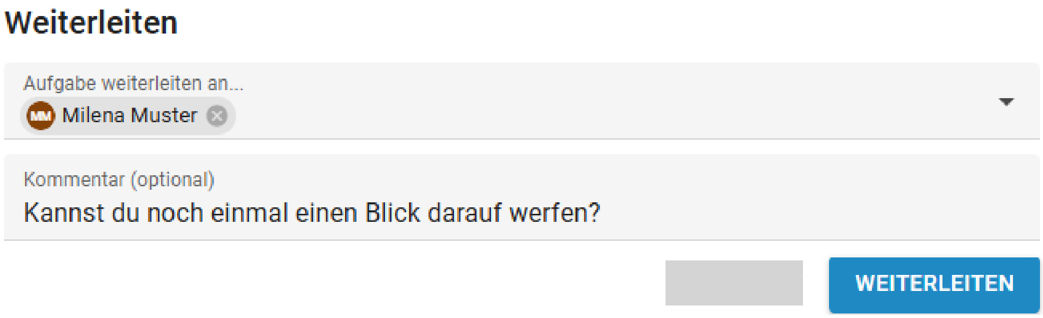
1.2.3. Forwarding a task to another person

Situations may arise in which you want to forward one of your tasks to another person. Let's assume you opened the attachment of a task and found out that you are not the correct person to receive the document. In this case, you can forward the task to another person.

This is how it works

1. Select the task in the task list.

2. Select **Forward**.
3. Enter the name of the person in the input field and select this person.
4. Optionally, enter a comment for forwarding.
5. Click **Forward**.



1.2.4. Withdrawing a task already edited by another person

You can send tasks to several people or groups. In addition, multiple people can have access to a task, e.g. due to delegates or the release of task lists. However, a task can only be edited by one person at a time. If a task that you are supposed to edit is already being edited by another person, you can withdraw the task from the current person.

This is how it works

1. Select the gear icon (**Additional settings and actions**) and click **Show tasks of other persons in progress**. The task list now also contains tasks that are currently being edited by other people.

2. Select the respective task.
3. Click **Withdraw task**.

You have now taken over the task yourself.

1.3. Additional functions and settings

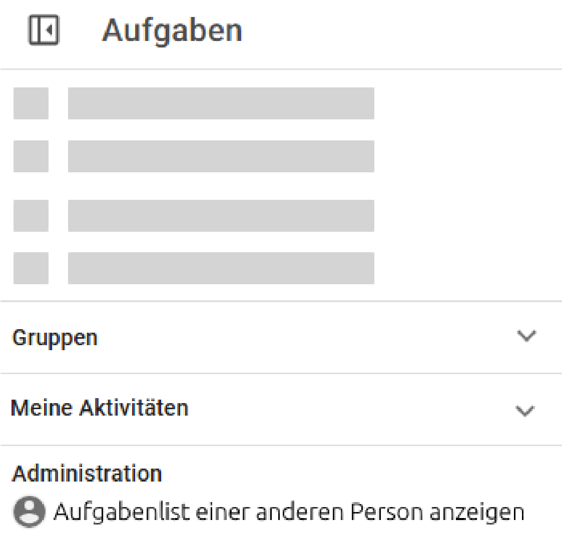
You can find additional functions supporting you during day-to-day work with the application in this section.

1.3.1. Forwarding a task already taken on by another person

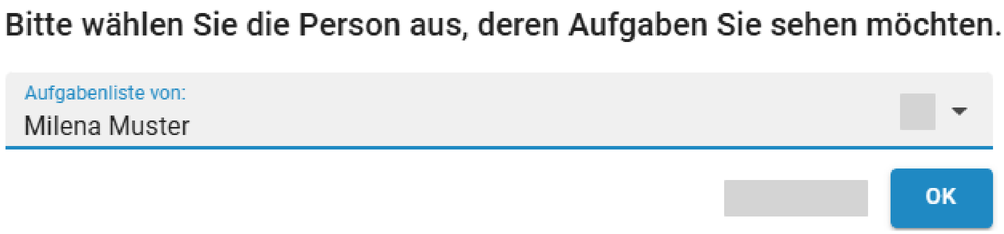
If you have been assigned the **Administration** role, you can forward tasks that are personally addressed to one person to another person.

This is how it works

1. Select **Show task list of another person**.



2. Enter the name of the person and click **OK**.



3. Select the task you want to forward.
4. Click **Forward**.
5. Enter the name of the person to whom you want to forward the task.
6. Optionally, enter a comment for forwarding.
7. Click **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 people 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 created via API.

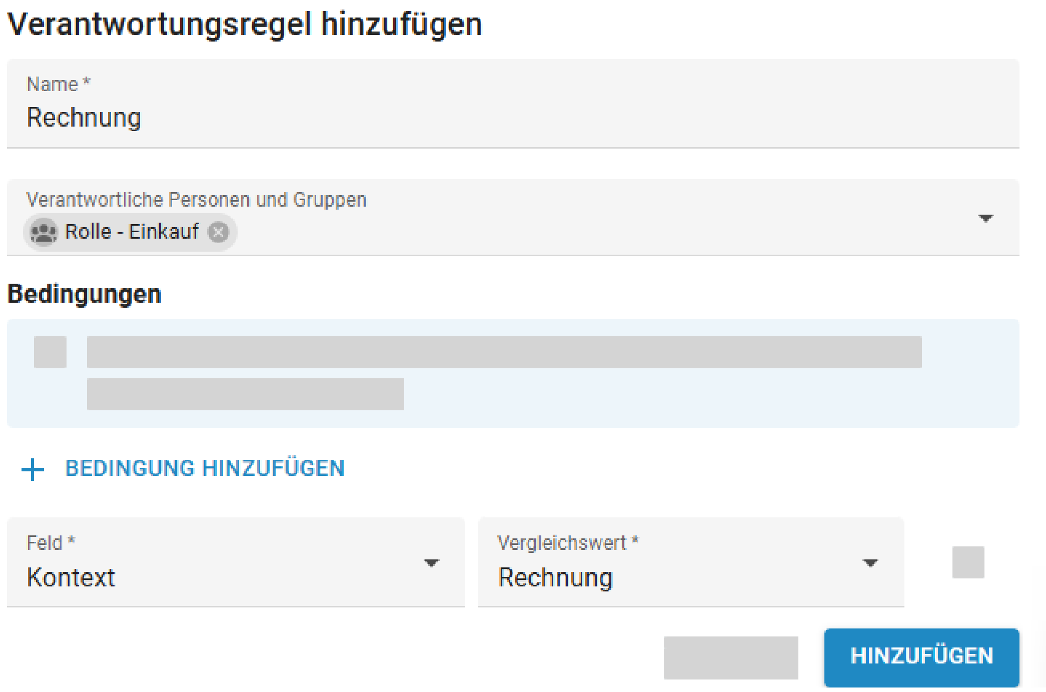
In order to add permissions for task contexts, you need to have been assigned the **Administration** user role.

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

This is how it works

1. Open the feature **Configuration**.
2. Under **Tasks** in the area **Tasks and processes**, 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. Enter the technical key of the metadata in this field.
7. Under **Responsible persons and groups**, enter the people or groups to which you want to give permission.



8. Click **Add**.
9. Save your changes.

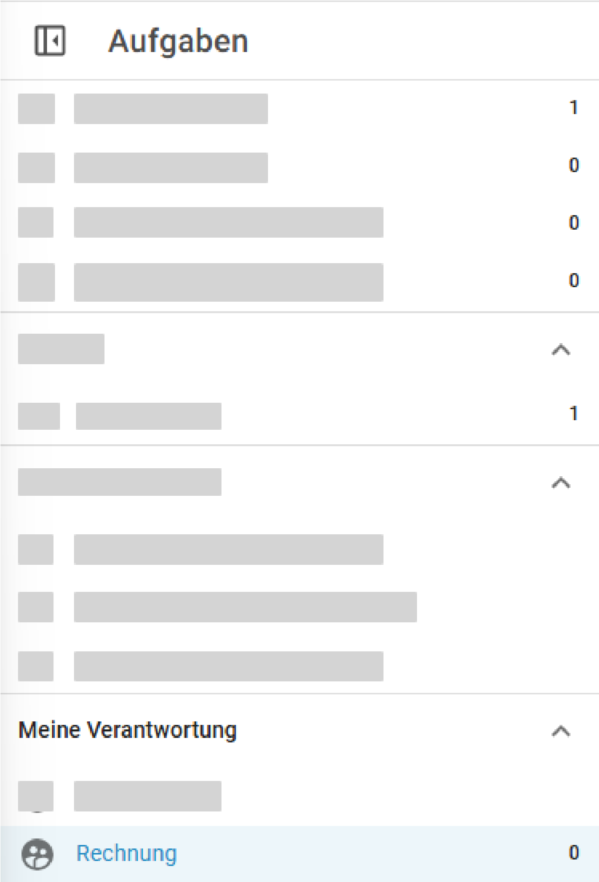
The permitted people can now select the “Invoice” task list.

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 can forward the tasks in your area of responsibility to other people.

This is how it works

1. Select the task type under **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 in the sidebar. The task lists are grouped according to the groups available to you, your activities and the tasks for which you are responsible.

The child task lists contain all tasks that have been assigned to you. 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 as well as to other people.
- **My planned tasks:** The task list contains all tasks that are already planned for you and will be sent to you in the future.

Groups

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 to which tasks were assigned. 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, the task 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 or that were created in your name (e.g. by a process).
- **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 the 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.

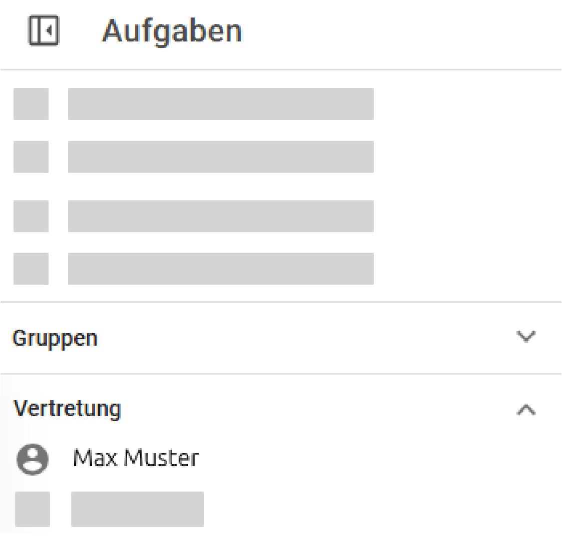
1.3.5. Standing in for another person

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 person, you can stand in for this person and manage their tasks. You can display the person's task list when this person has registered as absent.

Let's assume you have a colleague called John Smith 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. Under **Delegate** in the side bar, select the entry for **John Smith** to view all tasks that were sent to them as the sole recipient.



3. 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.

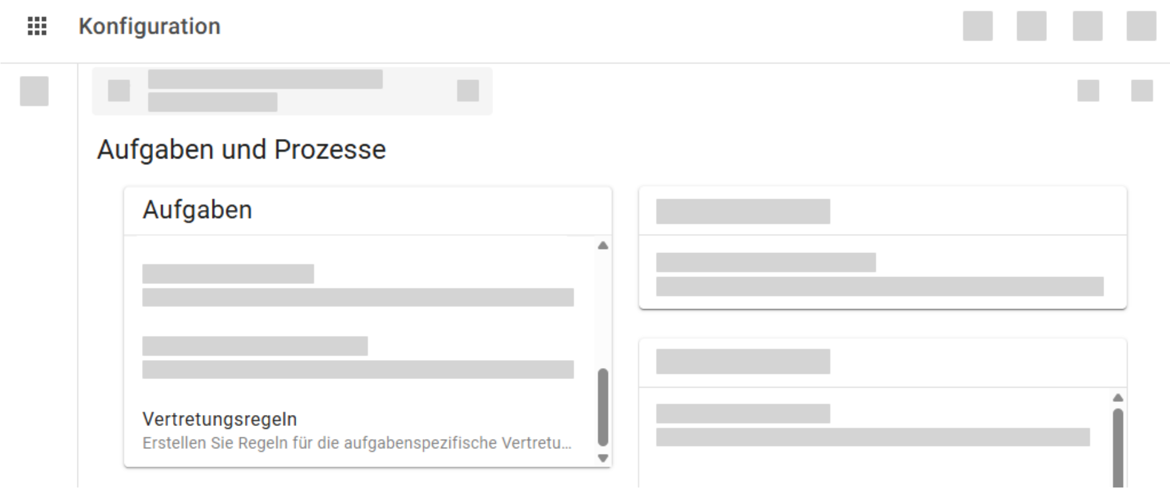
However, there may be situations in which you want to specify a different person as your delegate for certain task types. Specifying another person as your delegate can be useful if you want the person to stand in for all tasks with the context **Invoice**, for example. You can use metadata to further refine the delegated tasks. You can only access the internal metadata of the task. Additional information from other systems (as e.g. document properties) is not available.

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

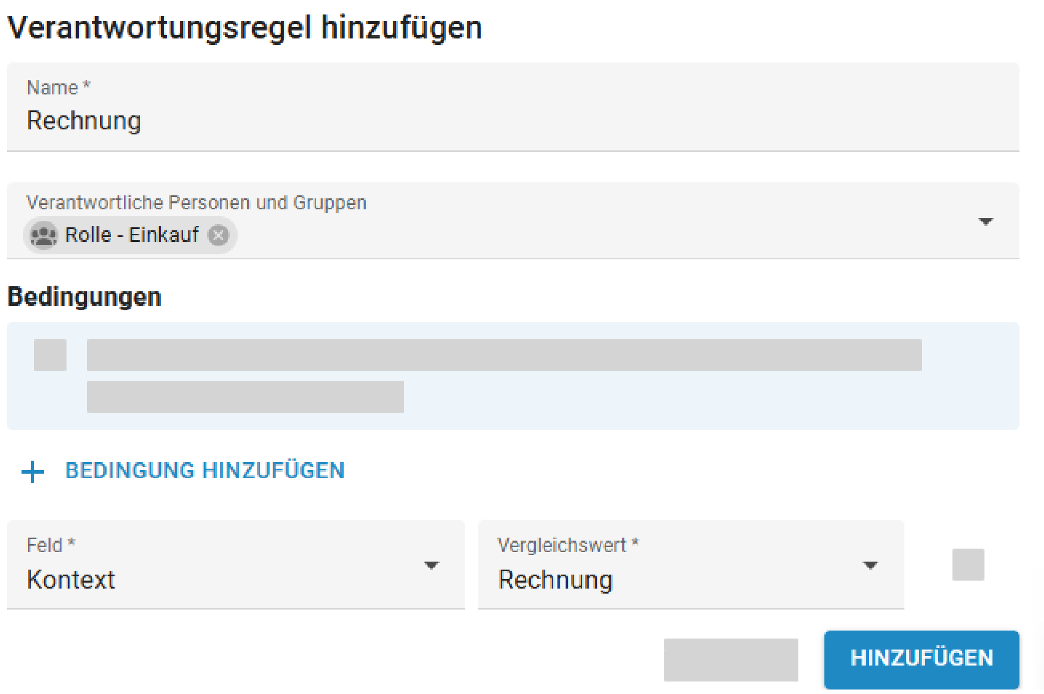
Let's assume you want to create a delegate rule for all tasks with the context "Invoice".

This is how it works

1. Open the feature **Configuration**.
2. Under **Tasks** in the area **Tasks and processes**, 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. Enter the technical key of the metadata in this field.
7. Click **Add**.



8. Save your changes.

All people can now configure a specific delegate for this delegate rule.

1.3.7. Defining a delegate for certain task types

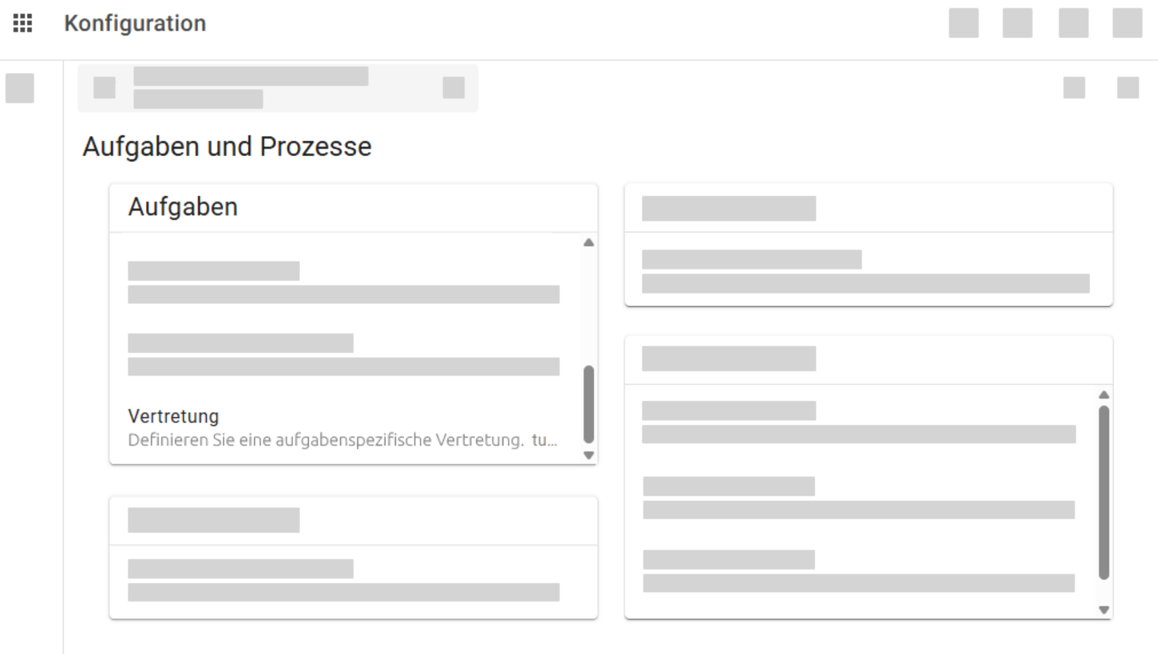
In your profile, you can specify a default delegate who can manage your tasks while you are absent. Your default delegate can manage all your tasks by default.

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

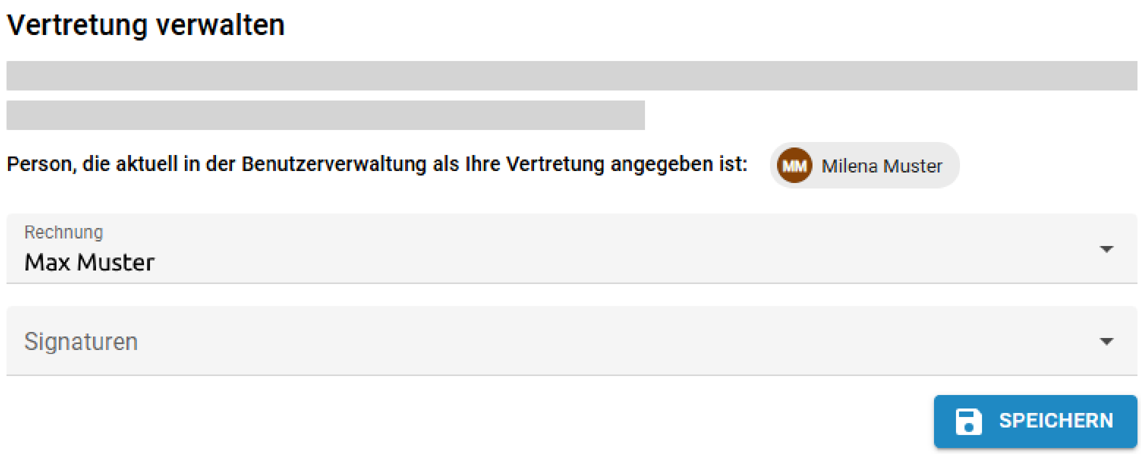
Let's assume you want to specify a person other than your default delegate for tasks of the type **Invoice**. Your administrator has already created a delegate rule called "Invoice" for this task type.

This is how it works

1. Open the feature **Configuration**.
2. Under **Tasks** in the area **Tasks and processes**, select the entry **Delegate**.



3. For the "Invoice" delegate rule, enter a person to stand in for you.



4. Save your changes.

If you do not make an entry 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 delegate, you can exclude these task types from delegation using a delegate rule. These task types can then no longer be managed by any other people.

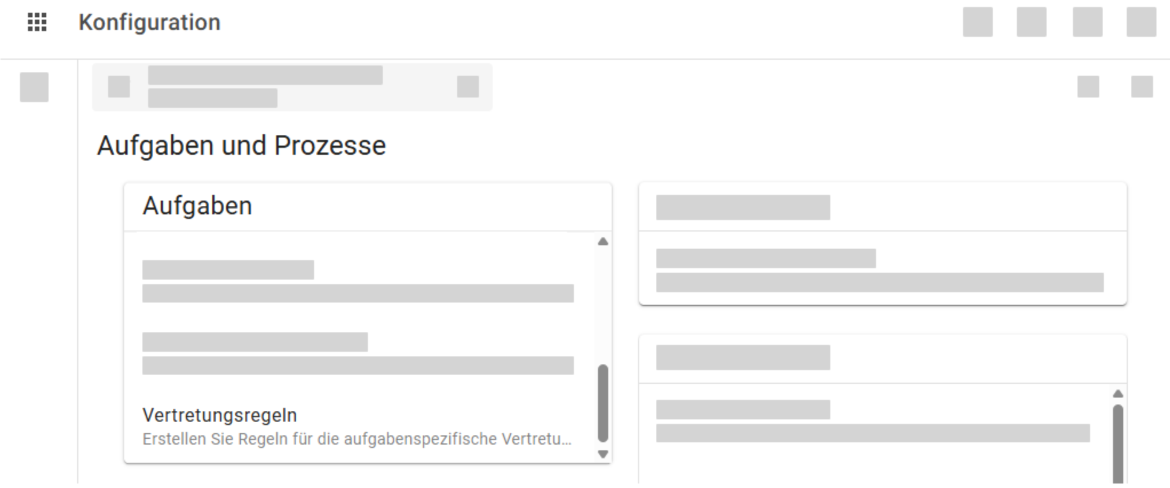
If a task meets the criteria for excluding delegation, the task cannot be viewed or edited by a delegate. Even if another delegate rule would allow this type of task to be managed, the delegation exclusion overrides this other rule.

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

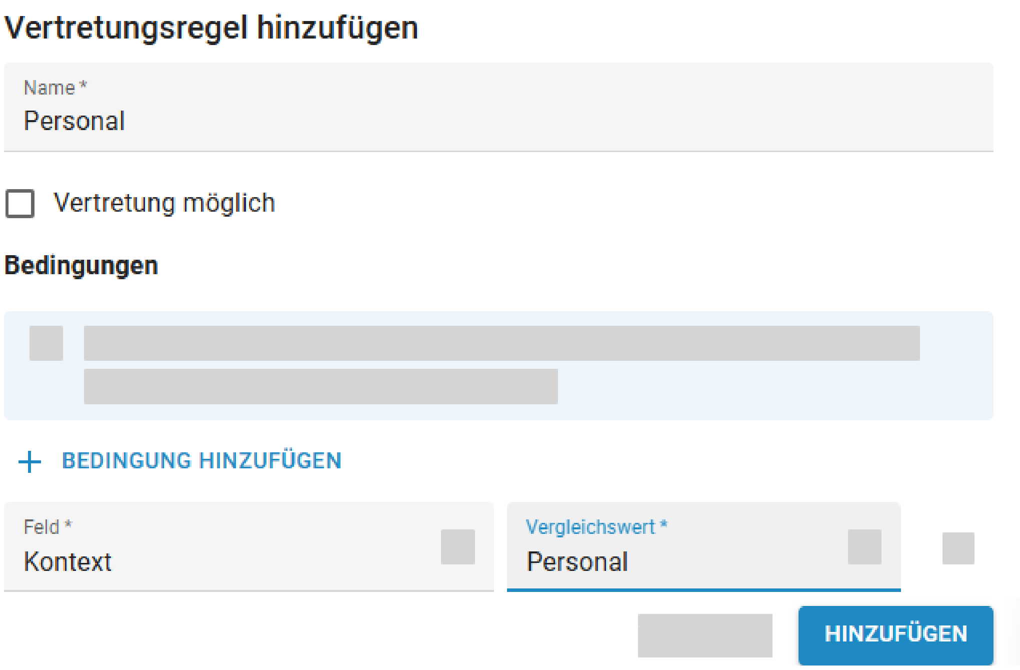
Let's assume you want to exclude all tasks with the context "HR" from delegation.

This is how it works

1. Open the feature **Configuration**.
2. Under **Tasks** in the area **Tasks and processes**, 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. Disable the **Delegation possible** option so that delegation is prohibited for this rule.



8. Confirm the dialog.
9. Save your changes.

Tasks of this type can now no longer be delegated.

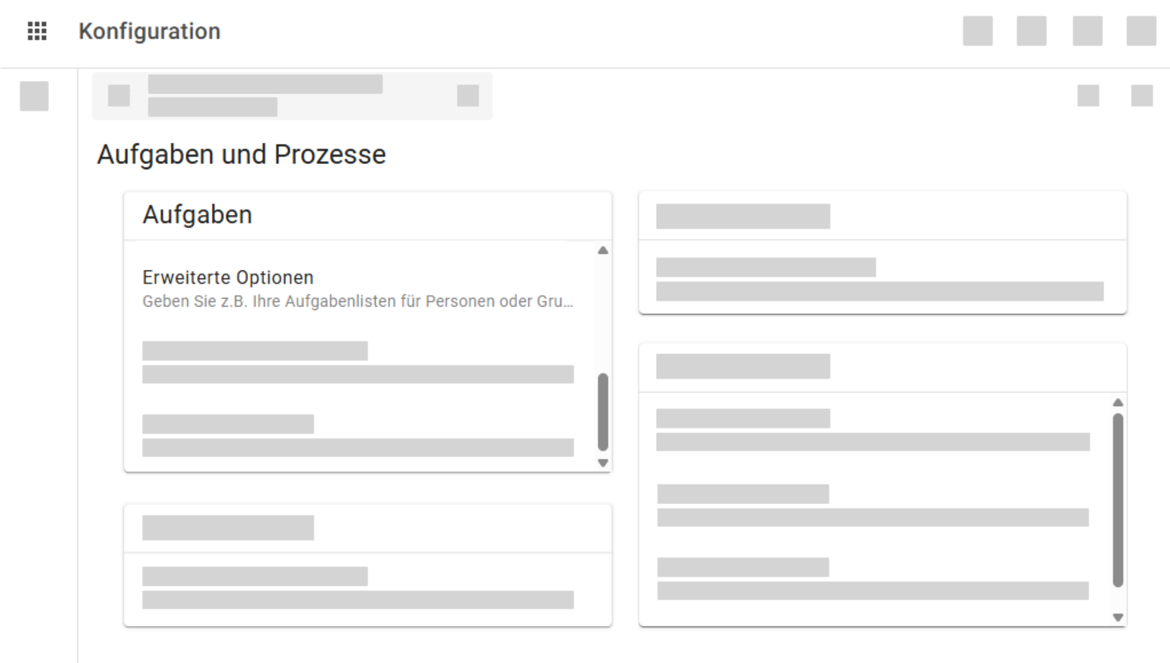
1.3.9. Releasing the task list for other people

When working as part of a team, it can be helpful to share your personal tasks with other team members. If your administrator has activated the release of task lists, you can share your assigned tasks with any number of people and groups. Tasks that were also assigned to additional persons or groups are not shared.

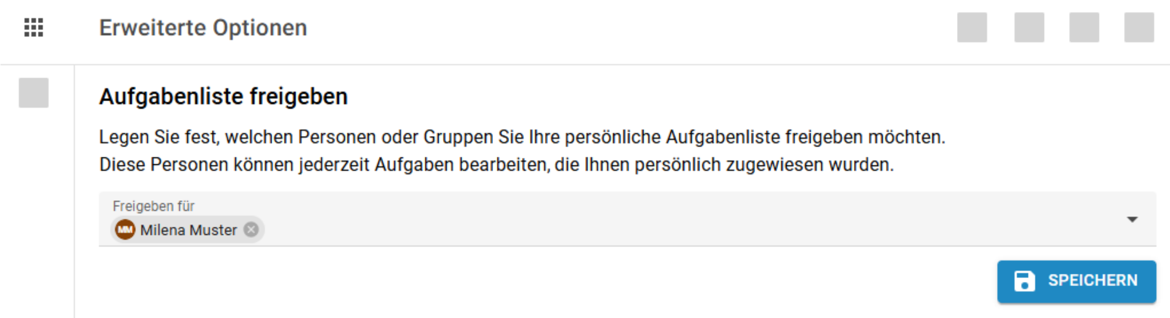
If you have been assigned the **Administration** role, you can also configure these shares on behalf of others.

This is how it works

1. Open the feature **Configuration**.
2. Navigate to **Tasks and processes > Tasks > Advanced options**.



3. In the **Share task list** area, enter the people or groups with whom you want to share your personal task list. If you have been assigned the **Administration** role, you can also select the user account the shares of which you want to configure.



4. Save your changes.

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

1.3.10. Working with layouts

You can save table views as a layout under a name of your choice and open previously saved layouts at any time. This provides a quick and simple means of switching between different table views.

A layout contains the grouping, column order, column sorting and filtering of the table view. You can create any number of layouts and share your layouts with other people.

> **Note**
>
> The following functions are only available if you have enabled the **Layouts** function under **Adjust view**. If the function is enabled and d.velop search is not available, the default layout is used.

Saving layouts

You want to save your current table view as a layout.

This is how it works

1. In the table view under **Adjust view**, select the option **Save view as layout**.
2. Enter a name for your layout.
3. Click **Save** to permanently save the table view as a layout.

You will then see your newly created layout under **Adjust view**.

Applying layouts

To apply a saved layout, click the corresponding layout name under **Adjust view**. The table view associated with the selected layout is then displayed.

The layout to be applied is saved separately for each mailbox.

Managing layouts

You can manage your saved layouts. Click **Adjust view > Manage layouts**. All your saved layouts are then listed.

You can rename, share or delete your layouts. You can access these options via the three horizontal dots.

Sharing a layout – this is how it works

1. Under **Recipients**, select the people you want to share the layout with.
2. You have the option of entering a brief description under **Message**.
3. Click **Share** to send the layout to the selected people.

These people then receive a task to accept or reject the shared layout.

> **Note**
> Note that your shared layouts are independent copies. Any changes you make to your own layouts will not be reflected in previously shared layouts.

Advanced administration options

In addition to the list of personal layouts, the administration area also contains a special list for the administration group. All members of the administration group have access to these layouts.

You should move any layouts that serve administrative purposes to the administration group. Otherwise only you can view and use these layouts.

Layouts for different groups

As an administrator, you have created specific layouts for different groups of people, such as employees in the accounting or personnel department. You have named these layouts accordingly and saved them in the administration group. With **Share layout**, you can make appropriate layouts available to the relevant group of people at any time, thus avoiding the need for manual creation.

1.3.11. Editing a shared task

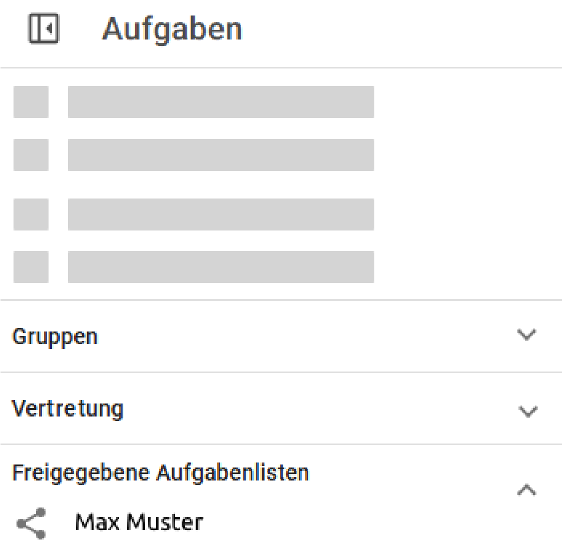
When working together as a team, you can use the function to share your task list to give each team member access to the tasks assigned to you personally. Tasks that have been assigned to additional people or groups are not displayed. If a team member shares their task list with you, you can view and edit the shared tasks at any time.

Let's assume you have a colleague called John Smith 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. Under **Shared task lists** in the side bar, select the entry for **John Smith** to view all tasks for which John Smith is the sole recipient.



3. Select a task.

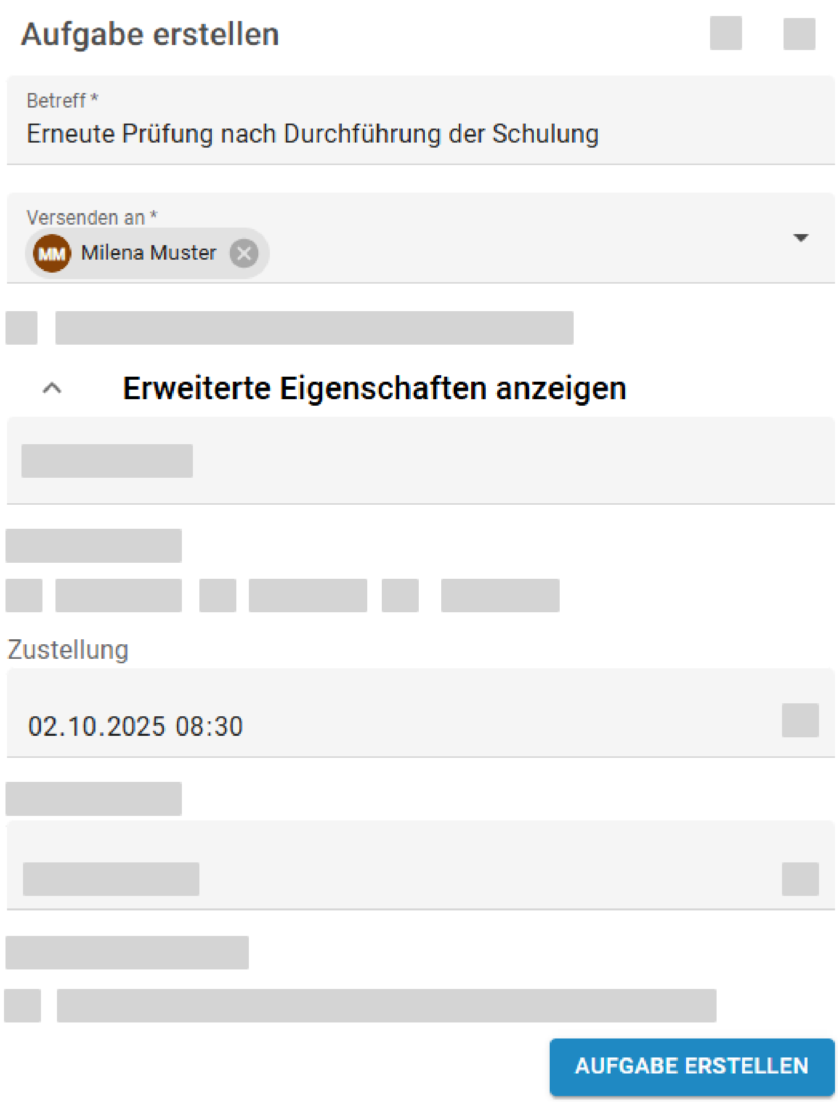
You can now complete the task yourself or forward it to another person.

1.3.12. Creating planned tasks

Planned tasks are tasks that you are planning for the future. When you create a planned task, you define a time in the future when the task will be delivered.

This is how it works

1. Open your task list.
2. Click **New task**.
3. Enter a subject.
4. Enter the name of one or more people to whom you want to forward the task.
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, the specified people see planned tasks in the **My planned tasks** list. From the defined delivery time, the planned tasks automatically appear in the task list for the relevant person. People to whom a task is sent are only notified of the receipt of planned tasks from the delivery time onward.

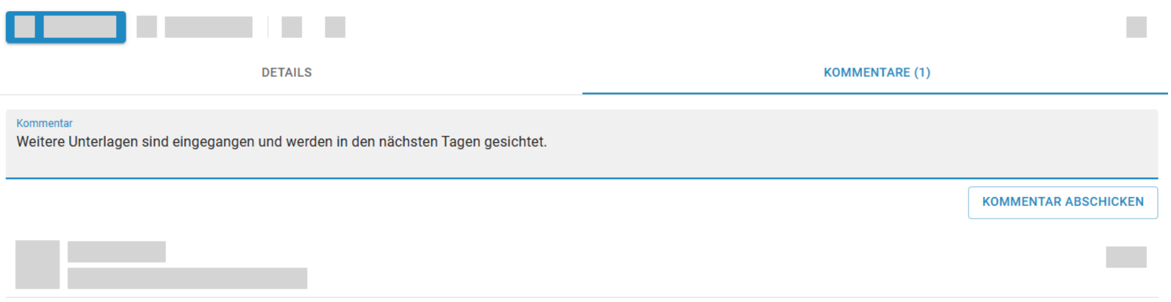
Alternately, you can create planned tasks via API using the parameter **receiveDate**. For more information, see the API documentation for d.ecs task.

1.3.13. Adding comments to tasks

You can add comments to tasks. You can find the comments relating to a task under **Comments**.

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 person. 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.

1.3.14. Setting up a task reminder

You can set up reminders for your tasks. A task that you have set up for a reminder will be listed in the **My planned tasks** category until the delivery date that you have set for the reminder.

This is how it works

1. Open the task for which you want to set up a reminder.
2. Click **(Edit later)**.
3. Select the delivery date.
4. If necessary, select whether you want to be notified by e-mail again when the task is delivered. You will only be notified if notifications are enabled in your system.
5. Click **Adopt**.

> **Note**
> The change of the delivery date is logged in the task history.

1.3.15. Changing the delivery date of a planned task

You can change the delivery date of a task planned for you.

This is how it works

1. Open the planned task.
2. Click **Change date**.
3. Select the delivery date.
4. Click **Adopt**.

> **Note**
> The change of the delivery date is logged in the task history.

1.3.16. Immediate delivering of a planned task

You can deliver a task that has been planned for you immediately. The task will then be moved to your task list.

This is how it works

1. Open the planned task.
2. Click **Deliver now**.

> **Note**
> The manual delivery of a planned task is logged in the task history.

1.3.17. Editing a task that you created

You can edit tasks that you created yourself.

This is how it works

1. Under **My activities**, select the **My created tasks** area.
2. Select the task that you want to edit.
3. Click **Edit**.
4. Edit the relevant fields.
5. Click **Apply**.

> **Note**
> If the delivery date is in the past, the corresponding field is cleared. The persons under **Send to** cannot be edited.

1.3.18. Editing individual tasks

After completing a task, your next task will open in the detail view by default. If you would like to return to the task list instead, you can use the **Edit tasks separately** setting.

Please note that this means you will no longer be able to use the sidebar to switch between tasks within the detailed view of a task.

This is how it works

1. Open the task list.
2. Click on the gear icon (**More settings and actions**).
3. Click on **Edit tasks separately**.

> **Note**
> If you use multiple selection to open multiple tasks, the **Edit tasks separately** setting is ignored.

1.3.19. Deleting a task that you created

You can delete tasks that you created yourself.

This is how it works

1. Under **My activities**, select the **My created tasks** area.
2. Select the task that you want to delete.
3. Click **Delete** and confirm the prompt.

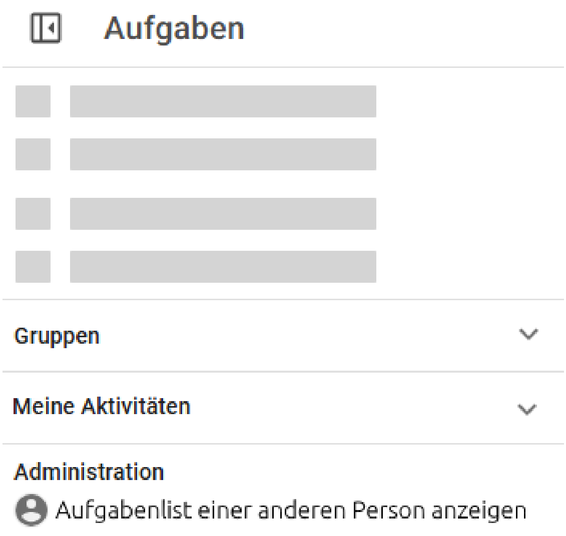
> **Note**
> Tasks may have been created in your name as part of automated processes. You cannot delete these tasks yourself.

1.3.20. Deleting other people's tasks

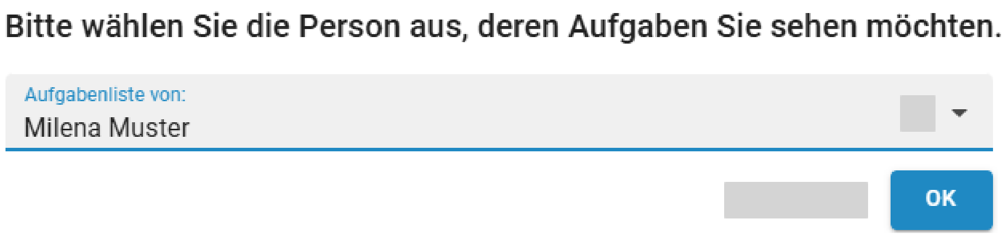
If you have been assigned the **Administration** role, you can delete tasks that are to be processed by other people.

This is how it works

1. Under **Administration**, select the **Show task list of another person** area.



2. Enter the name of the person and click **OK**.



3. Select the task that you want to delete.
4. Click **Delete**.
5. Confirm the prompt.

1.3.21. Using the task preview

You can activate the task preview in the task overview to view the task information or attachments without opening the task itself.

This is how it works

1. Click **Toggle task preview**.
2. Use **Details** and **Attachment** to switch between the task details and task attachments.

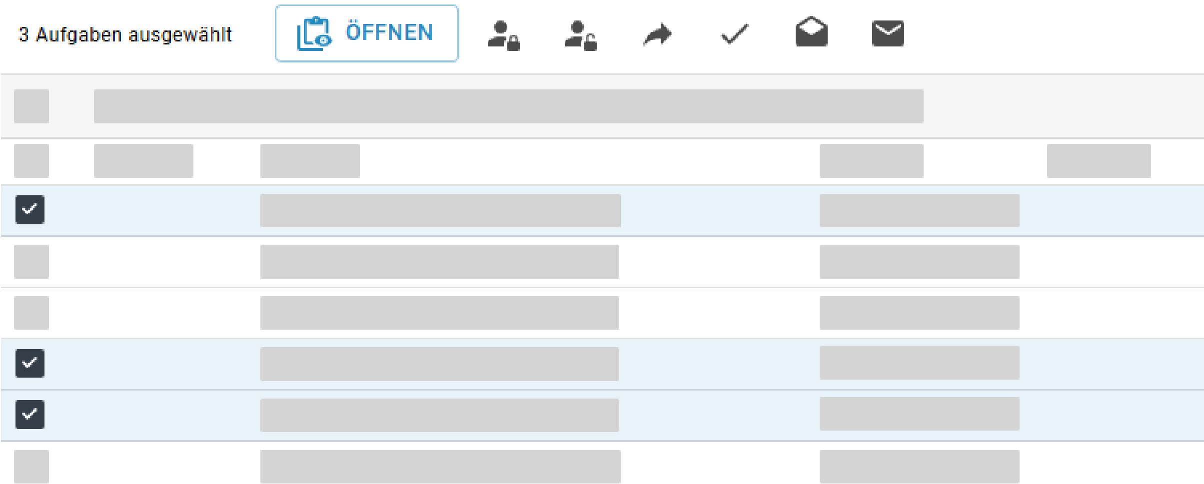
> **Note**
> You can close the task preview again by clicking **X** or **Toggle task preview**.

1.3.22. Multiple selection in the task overview

In the table view of the task overview, you can use the options in the table to select multiple tasks and, for example, close them in one step.

This is how it works

1. Select the tasks that you want to complete in the table.
2. In the action bar, click ✓ **Complete task**.
3. Confirm the prompt.



The following actions are available as multiple actions:

- Open
- Adopt/Return task
- Forward task
- Complete task
- Mark task as read/unread

> **Note**
> You cannot perform multiple actions on individual tasks. This is because a process may, for example, define that a task must be completed or forwarded only during individual processing.

1.3.23. 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 existing tasks for this document using the context action **Show tasks for the document**.

This task overview and the displayed properties help you to determine, for example, whether a document is already being checked.

1.4. Frequently asked questions

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

1.4.1. How can I view other people's task lists?

You can view other people's task lists if you have been assigned the **Administrator** role. To view another person's tasks, select the button **Show task list of another person** and then enter the person's name.

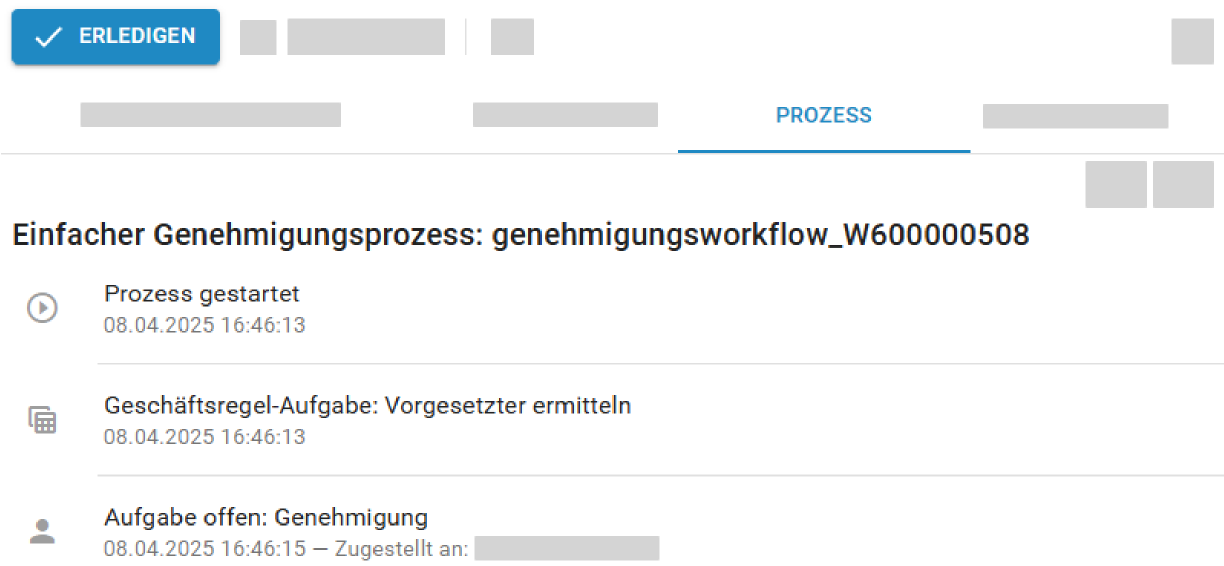
1.4.2. How long are completed tasks kept?

When you complete a task, the task 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.

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

If your task is part of a digital business process, **Process** is displayed 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.

1.4.4. 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 **Adjust view**.
2. Click **Reset current view**.

> **Note**
> This menu item is only available if you are not using the **Layouts** feature.

1.4.5. 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 **Adjust view**.
2. Click **Customize columns**.
3. In the configuration area **Customize columns**, select the table columns that you want to show or hide.
4. Close the configuration area.

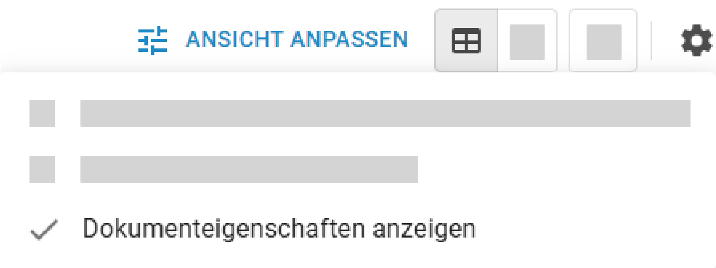
1.4.6. Why do some table rows have a document symbol in the title?

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 the gear icon (**Additional settings and actions**).
2. Click **Show document properties** to switch the display of document properties on and off.



1.5. 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.