erwin Data Intelligence

My Action Center Guide

Release v13.2

Legal Notices

Contact erwin

Understanding your Support

Review support maintenance programs and offerings.

Registering for Support

Access the erwin support site and click Sign in to register for product support.

Accessing Technical Support

For your convenience, erwin provides easy access to "One Stop" support for erwin Data Intelligence (erwin DI), and includes the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- erwin Support policies and guidelines
- Other helpful resources appropriate for your product

For information about other erwin products, visit http://erwin.com/.

Provide Feedback

If you have comments or questions, or feedback about erwin product documentation, you can send a message to distechpubs@erwin.com.

News and Events

Visit News and Events to get up-to-date news, announcements, and events. View video demos and read up on customer success stories and articles by industry experts.

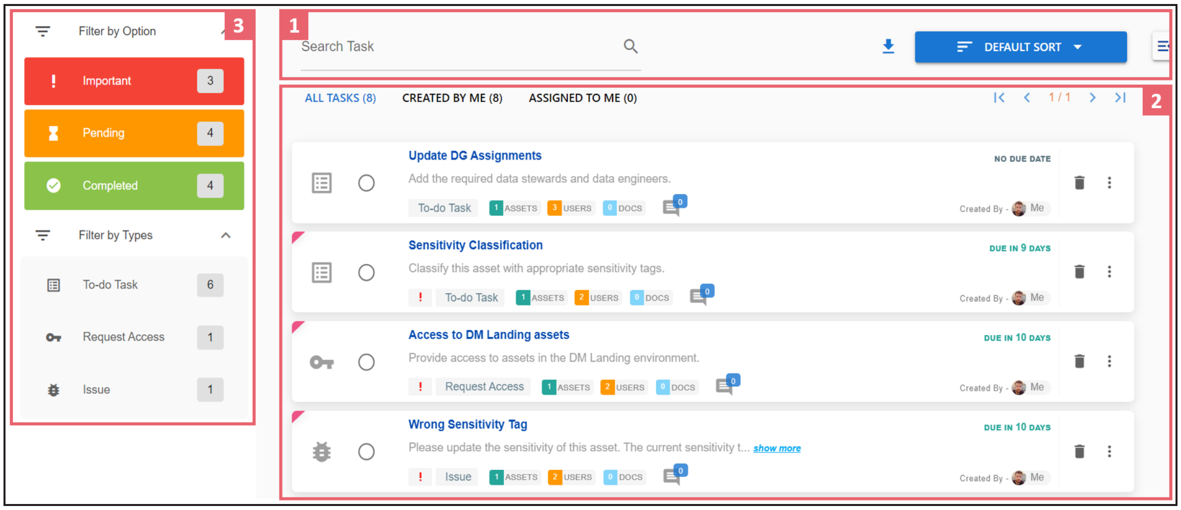
Contents

Managing My Actions

This section walks you through managing actions on tasks assigned to you or your team members. While collaborating with team members, it is necessary to create, assign, and track tasks. With My Action Center, you can manage and track tasks that are created and assigned using other modules. Assignees receive notifications about these tasks and can view them in My Action Center.

Using My Action Center

To access My Action Center, go to **Application Menu** > **My Action Center**. The My Action Center dashboard appears:



UI Section	Function
1-Utility	Use this section to search, sort, configure task types, and download the task list.
2-Task List	Use this section to browse and manage tasks. It displays a list of tasks categorized under All Tasks, Created By Me, and Assigned to Me.
3-Filter	Use this section to filter tasks based on task types.

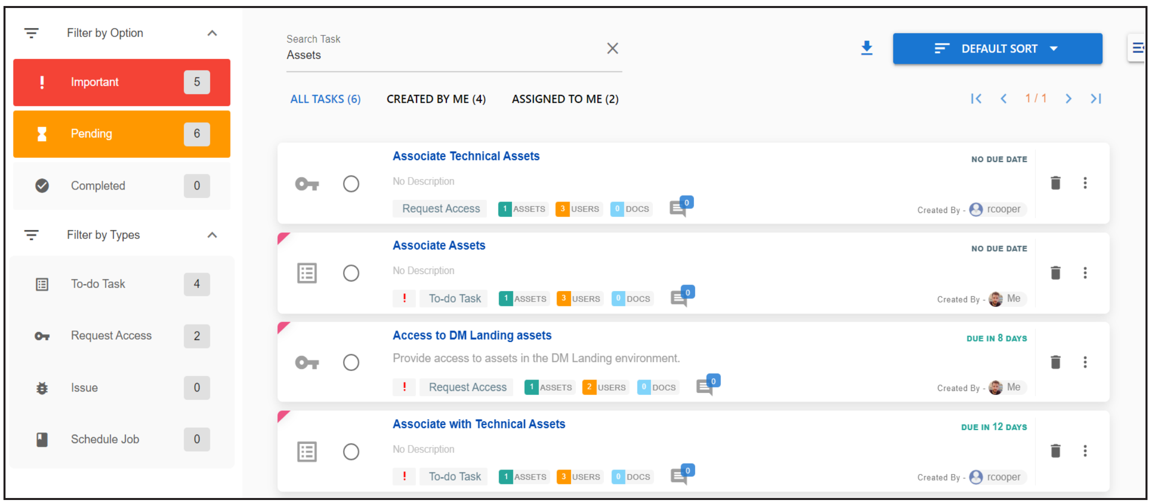
Filtering and Searching Tasks

To get you started with managing tasks, this topic walks you through the filter and search mechanisms.

To filter and search tasks, in the search box, type a keyword and press enter.

The search results appear. You can view number of tasks based on their status (Important, Pending, and Completed) and types (To-Do task, Request Access, Issues, and so on).

For example, in the following image, for a keyword, Assets, search results include five important tasks, six pending tasks, four To-Do Tasks, and two Request Access tasks.

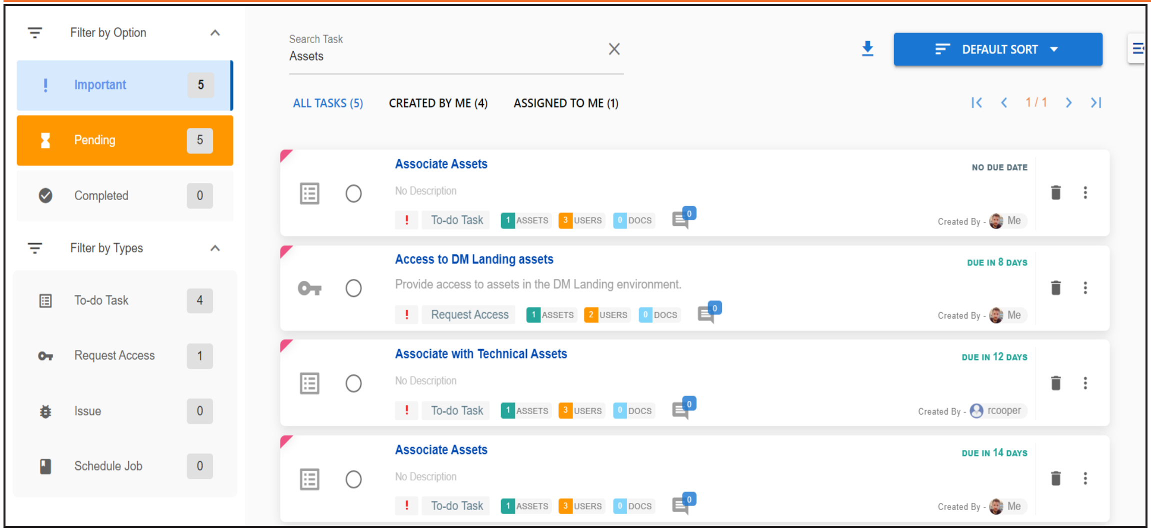


You can narrow down these search results on task status. Under the **Filter by Option**, click a filter.

The applied filter turns blue, and the search results change based on the applied filter.

For example, in the following image, a filter, Important is applied. The search results displays five tasks under the All Tasks list.

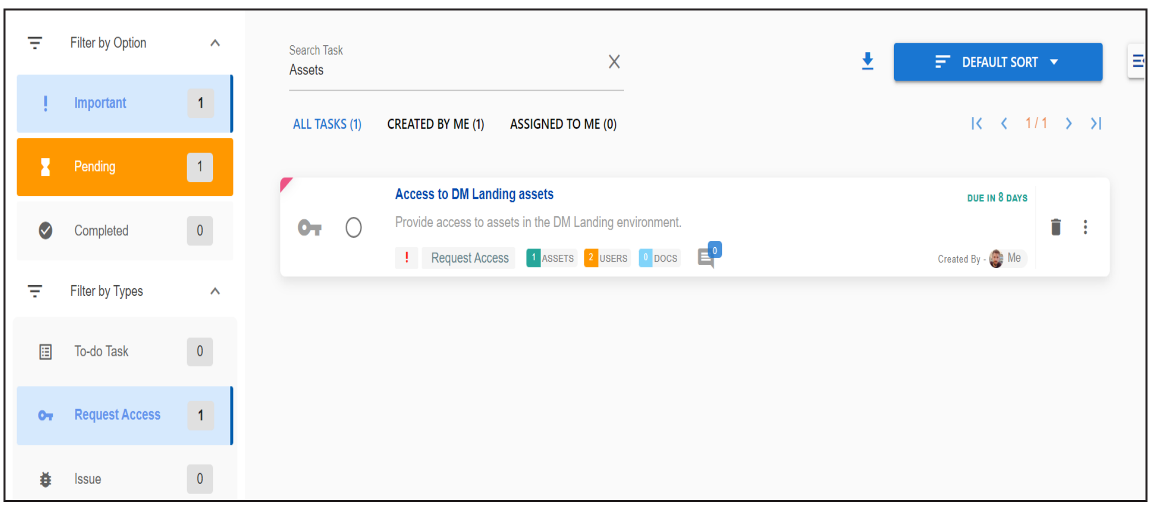
Filtering and Searching Tasks



You can narrow down the search results further based on task types. Under **Filter by Types**, click a filter.

The applied filter turns blue and the search results change based on the applied filter.

For example, in the following image, a filter, Request Access is applied. The search result displays one task under the All Tasks list.



Similarly, you can apply other filters to reduce the search results to a meaningful result set.

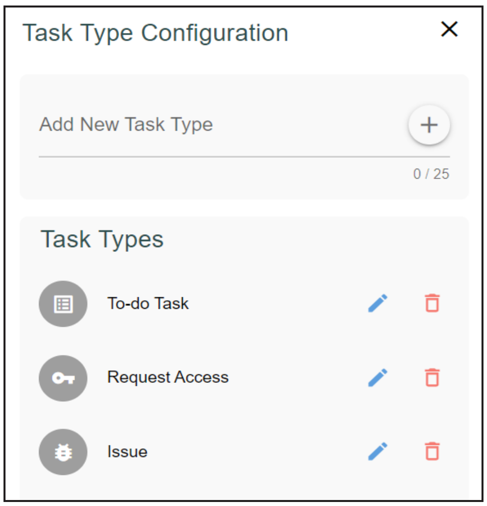
Configuring Task Types

You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.

To configure task types, follow these steps:

1. In the utility section, click .

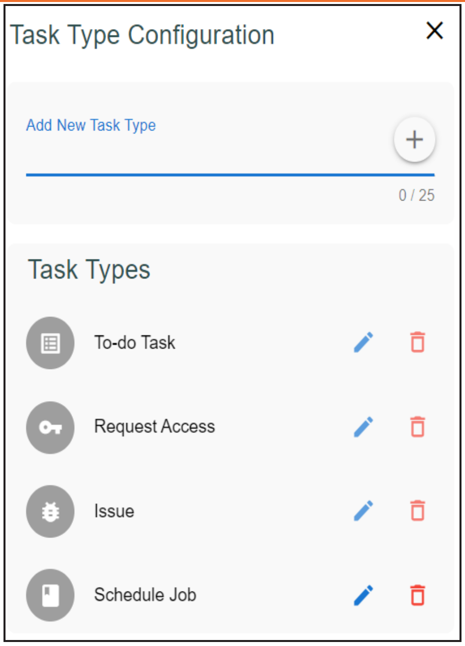
   The Task Type Configuration pane appears. It displays a list of available task types.

2. In the Add New Task Type box, enter a new task type and click .

   The task type is added tp the list of available tasks.

   For example, in the following image, a task type, Schedule Job is added.



Use the following options to manage task types:

Edit ( )

Use this option to edit task types.

Delete ( )

Use this option to delete task types.

Managing Tasks

Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on a task tile, click the radio button.

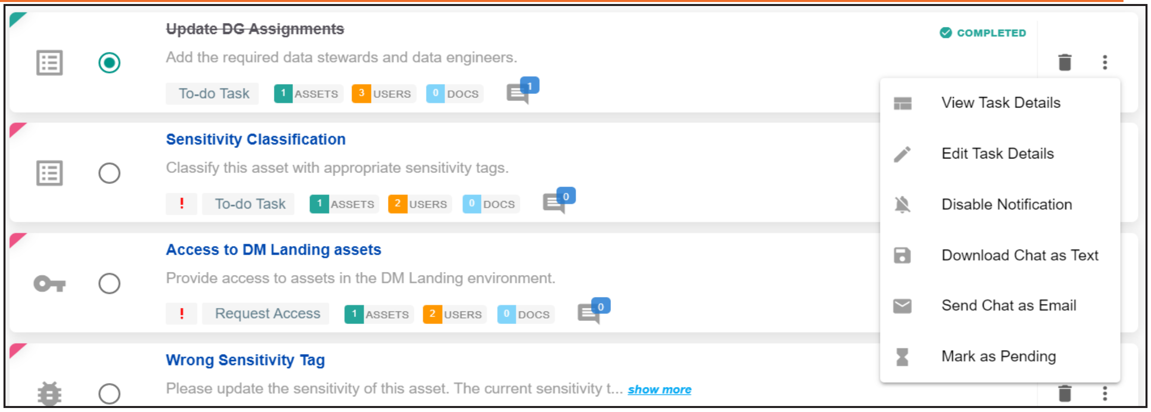
The task is moved to the list of completed task.

For example, in the following image, the task, Update DG Assignments is marked complete.

To further manage tasks, follow these steps:

1. On a task tile, click ⋮.

   The available options appear.



2. Use the following options to work on tasks:

View Task Details

Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

Alternatively, you can also click a task tile to view its details.

Edit Task Details

Use this option to update task details.

Disable Notification

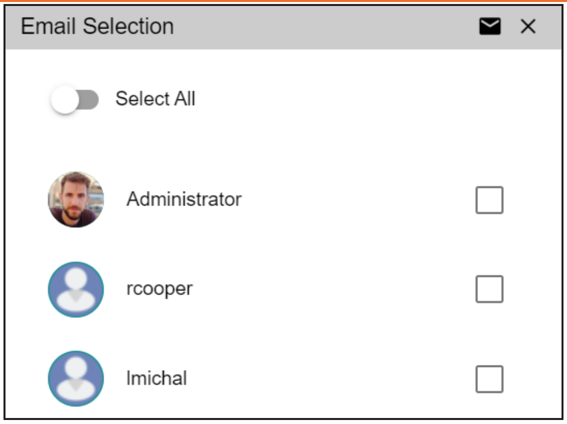
Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to a task receive them.

Download Chat as Text

Use this option to download chat related to a task in the TXT format.

Send Chat as Email

Use this option to share the chat related to a task via an email. Click **Send Chat as Email**.
The Email Selection page appears. It displays a list of users assigned to the task.



Select the required users, and then click . An email is sent to the selected users.

Mark as Pending

This option is available for a completed task. Use this option to mark a task as pending.

To delete a task, on a task tile, click .

You can delete a task only if you have created it.