

erwin Data Intelligence

My Action Center Guide

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Managing My Actions

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:

Ŧ	Filter by Option	, 3	1	Search 1	Task	Q	± [E DEFAULT SORT	•		Ξ
!	Important	3	F	ALL TASK	(S (8)	CREATED BY ME (8) ASSIGNED TO ME (0)		IK K 1/:	>	×	2
X	Pending	4				Update DG Assignments		NO DUE DATE			
0	Completed	4		Ξ	0	Add the required data stewards and data engineers.		Created By - 🌰 Me	Î	:	
Ŧ	Filter by Types	^	-			Sensitivity Classification		Created By - 👹 MB			
⊞	To-do Task	6		⊞	0	Classify this asset with appropriate sensitivity tags. I To-do Task I ASSETS 2 USERS 0 DOCS 20		Created By - 🍩 Me	Î	:	
07	Request Access	1	1	0-7	\bigcirc	Access to DM Landing assets Provide access to assets in the DM Landing environment.		DUE IN 10 DAYS	÷		
¢	Issue	1		•1	0	! Request Access 🚺 ASSETS 🔁 USERS 💿 DOCS 🗐		Created By - 🍘 Me	-		
			1	ă	\bigcirc	Wrong Sensitivity Tag Please update the sensitivity of this asset. The current sensitivity t show more		DUE IN 10 DAYS	Î	:	
				-	0	! Issue 1 Assets 2 Users 1 DOCS		Created By - 🍘 Me	-		

UI Sec- tion	Function
1-Util- ity	Use this section to search, sort, <u>configure task types</u> , and download the task list.
	Use this section to <u>browse and manage tasks</u> . It displays a list of tasks categorized under All Tasks, Created By Me, and Assigned to Me.
3-Filter	Use this section to <u>filter tasks</u> based on task types.

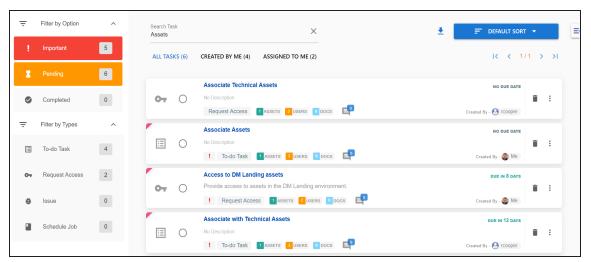
Filtering and Searching Tasks

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

Ŧ	Filter by Option	^	Search Tas Assets	sk	×	Ŧ	E DEFAULT SORT	•			
1	Important	5	ALL TAS	KS (5)	CREATED BY ME (4) ASSIGNED TO ME (1)		I< < 1/	1 >	×I		
z		5	-		Associate Assets						
0	Completed	0		0	No Description ! To-do Task 1 Assets 1 users 10 poces 1		NO DUE DATE	Î	:		
Ŧ	Filter by Types	^	-		Access to DM Landing assets		DUE IN 8 DAYS				
∷	To-do Task	4	От (07	0	Provide access to assets in the DM Landing environment. ! Request Access 1 Assets 2 Users 0 Docs		Created By - 🍥 Me	Î	:	
07	Request Access	1		0	Associate with Technical Assets No Description		DUE IN 12 DAYS	î			
ŧ	Issue	0		0	I To-do Task I Assets Users Docs		Created By - 😣 rcooper	1	:		
	Schedule Job	0		\bigcirc	Associate Assets No Description		DUE IN 14 DAYS		;		
				0	! To-do Task 1 Assets 1 Users 1 pocs		Created By - 🍣 Me		·		

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.

Ŧ	Filter by Option	^	Search Task Assets	X	E DEFAULT SORT 🔸 🖃
1	Important	1	ALL TASKS (1)	CREATED BY ME (1) ASSIGNED TO ME (0)	IC < 1/1 > >I
X	Pending	1	,	Access to DM Landing assets	DUE IN 8 DAYS
0	Completed	0	OT ()	Provide access to assets in the DM Landing environment. Request Access	Created By - 🏀 Me
Ŧ	Filter by Types	^		· reguest Aucess Prosens Doces Prova	Ursated D) - 📷 mo
∷	To-do Task	0			
07	Request Access	1			
#	Issue	0			

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 \equiv .

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

Task Type Configuration	×
Add New Task Type	+
Task Types	
To-do Task	/ Ō
Request Access	1
issue	1

2. In the Add New Task Type box, enter a new task type and click $\stackrel{(+)}{-}$.

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

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

Configuring Task Types

Task Type Configuration	×
Add New Task Type	+
	0 / 25
Task Types	
To-do Task	1 0
Request Access	/ Ō
Ssue Issue	/ Ō
Schedule Job	/ Ō

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.

Search Task	Q 6 ¹	E DEFAULT SORT 👻
ALL TASKS (8)	CREATED BY ME (8) ASSIGNED TO ME (0)	I< < 1/1 → >I
	Update DC Assignments Add the required data stewards and data engineers.	© COMPLETED
	To-do Task 1 Assets 3 Users 0 Docs	Created By - 🍥 Me

To further manage tasks, follow these steps:

1. On a task tile, click .

The available options appear.

Managing Tasks

	۲	Update DC Assignments Add the required data stewards and data engineers.		COMPLETED
		To-do Task 1 Assets 3 Users 0 Docs	=	View Task Details
	0	Sensitivity Classification Classify this asset with appropriate sensitivity tags.	1	Edit Task Details
		! To-do Task 1 Assets 2 Users 0 Docs E	ж.	Disable Notification
От	0	Access to DM Landing assets Provide access to assets in the DM Landing environment.	8	Download Chat as Text
	0	! Request Access 1 assets 2 users 0 docs	\sim	Send Chat as Email
-		Wrong Sensitivity Tag	x	Mark as Pending
益	\bigcirc	Please update the sensitivity of this asset. The current sensitivity t show more		1 E

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

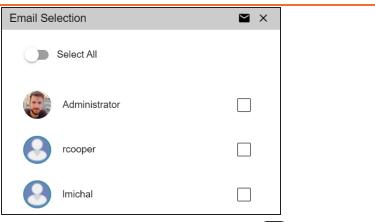
Use this option to download chat related to a task in the TXT format.

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.

Managing Tasks



Select the required users, and then click \blacksquare . 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 \mathbf{I} .

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