erwin Data Intelligence

My Action Center Guide

Release v15.0

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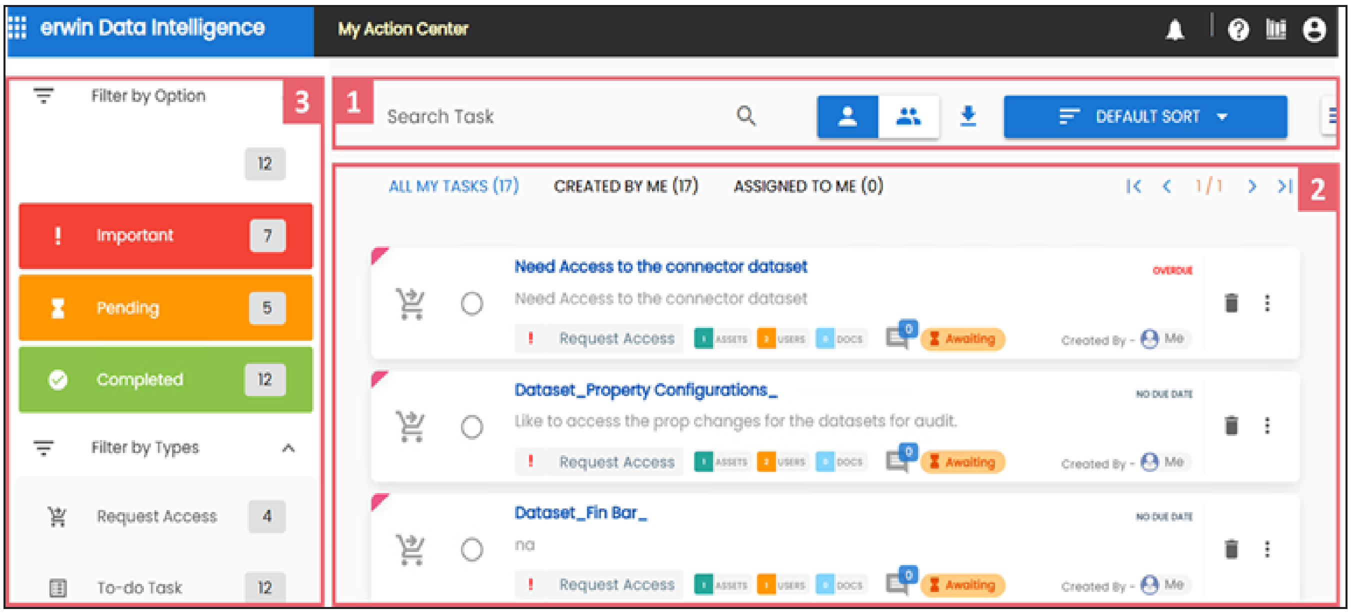
Contents

My Action Center

My Action Center allows you to manage, and track tasks assigned to you or your team members. You can also manage and track tasks created and assigned using other modules. Assignees receive notifications about these tasks and can view them in My Action Center.

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



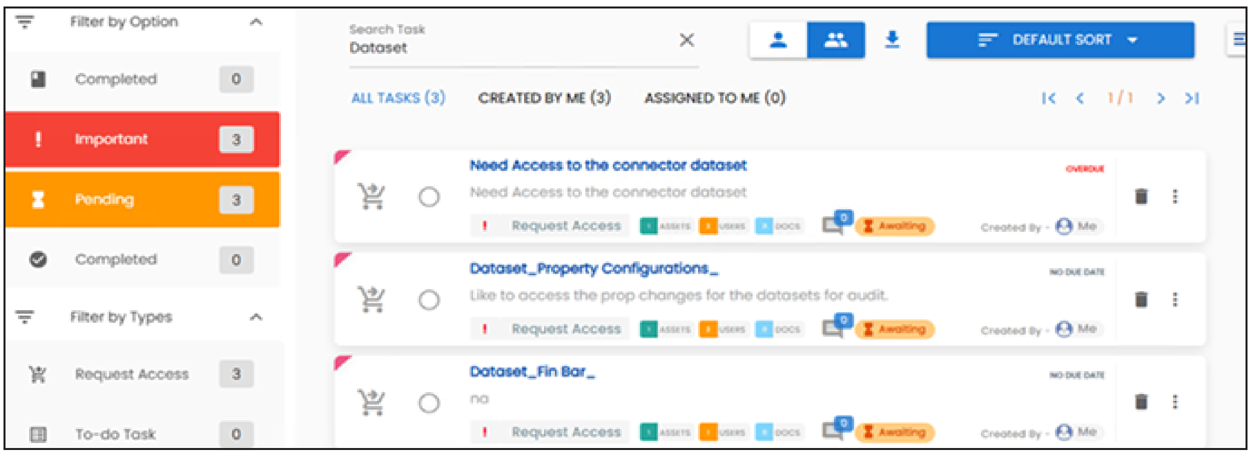
UI Section	Function
1-Utility	Use this section to search, sort, configure task types, and download the task list. Additionally, you can switch between and to view my tasks and all tasks.
2-Task List	Use this section to browse and manage tasks. It displays a list of tasks categorized under All My Tasks, 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 the 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, Dataset, search results include three important tasks, three pending tasks, and three Request Access tasks.

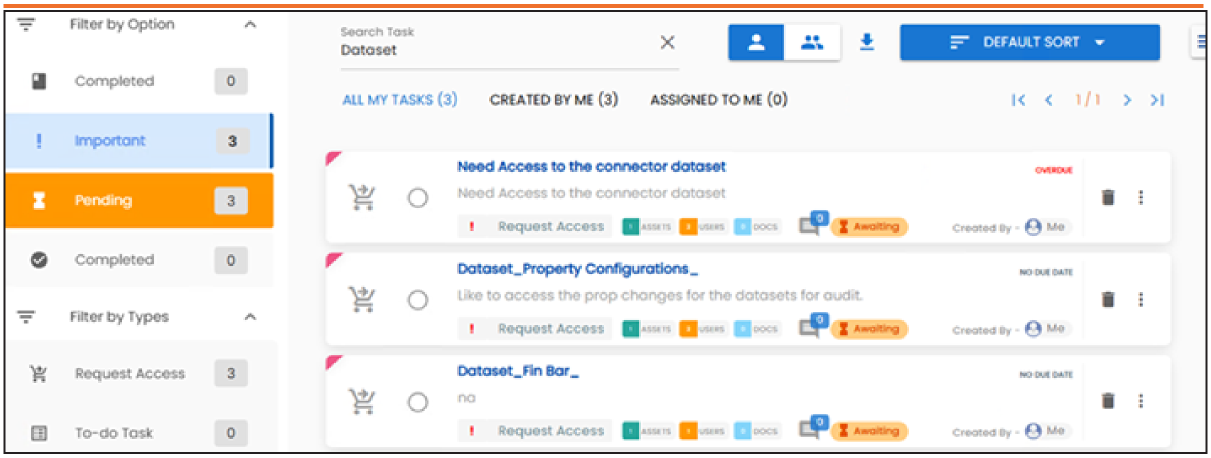


You can narrow down these search results on task status. Under the **Filter by Option**, click a filter.

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 display three tasks under the All My Tasks list.

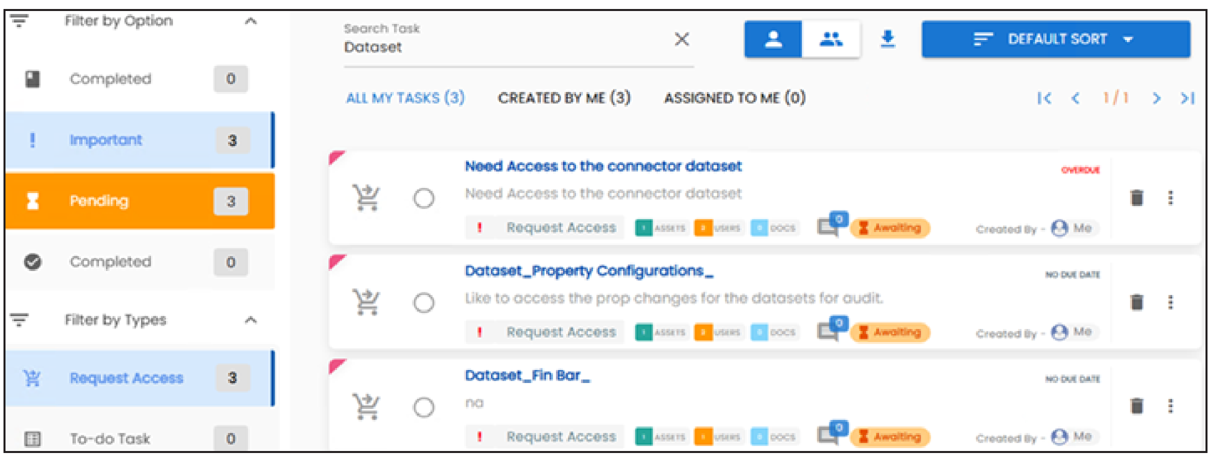
Filtering and Searching Tasks



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, two filters, Important and Request Access are applied. The search result displays three tasks under the All My Tasks list.



Similarly, you can apply other filters to reduce the search results to a meaningful result set. Additionally, you can switch between the following options:

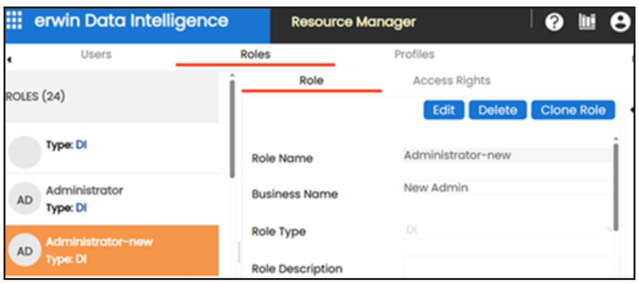
- **My Tasks** ( ): Displays tasks created by or assigned to you.
- **All Tasks** ( ): Displays all tasks.

The **All Tasks** option is available only when the **View All Task** checkbox is selected for the user under the Permission Tree section in the Resource Manager module. For more information on enabling this option, refer to the [Enabling All Tasks Option](#) topic.

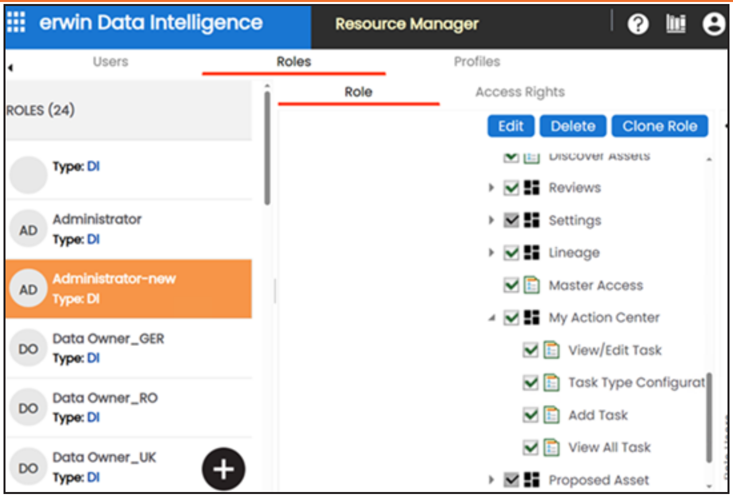
Enabling All Tasks Option

To enable All Tasks option, follow these steps:

1. Go to the **Application Menu** > **Data Catalog** > **Resource Manager**.
2. By default, the **Users** tab opens.
3. Click the **Roles** tab.
4. On the Roles tab, click **Role**.



5. Click **Edit**.
6. Under Permission Tree, expand **My Action Center** and then select the **View All Task** checkbox.


erwin Data Intelligence
Resource Manager
Users
Roles
Profiles
ROLES (24)
Type: DI
Administrator
Type: DI
Administrator-new
Type: DI
Data Owner_GER
Type: DI
Data Owner_RO
Type: DI
Data Owner_UK
Type: DI
Role
Access Rights
Edit
Delete
Clone Role
Reviews
Settings
Lineage
Master Access
My Action Center
View/Edit Task
Add Task
View All Task
Proposed Asset

7. Click **Save**.

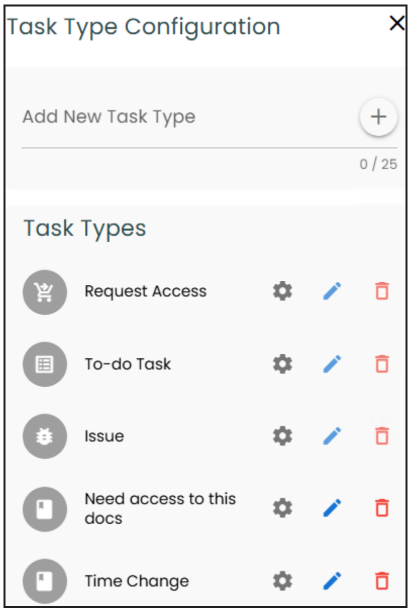
Configuring Task Types

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. Additionally, you can create custom task types depending on your requirements.

To add custom task types, follow these steps:

1. In the utility section, click .

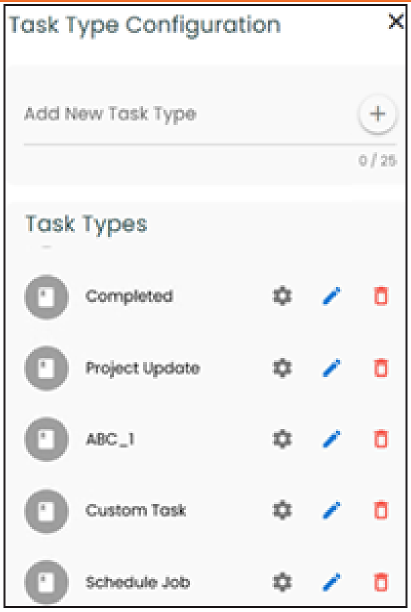
   The Task Type Configuration pane appears and displays a list of available task types.

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

   The task type is added to 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:

Configure Task Type ( )

Use this option to configure task types.

Edit ( )

Use this option to edit task types.

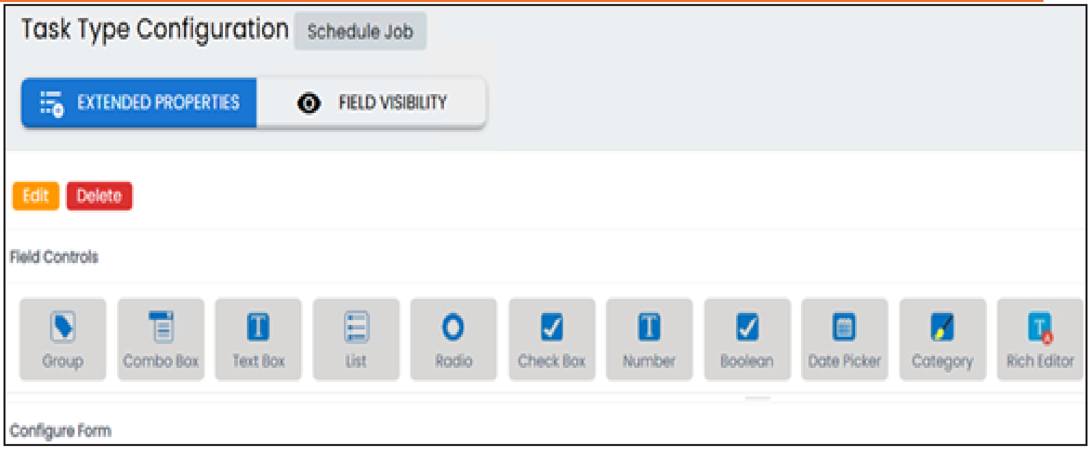
Delete ( )

Use this option to delete task types.

To configure task types, follow these steps:

1. Click .

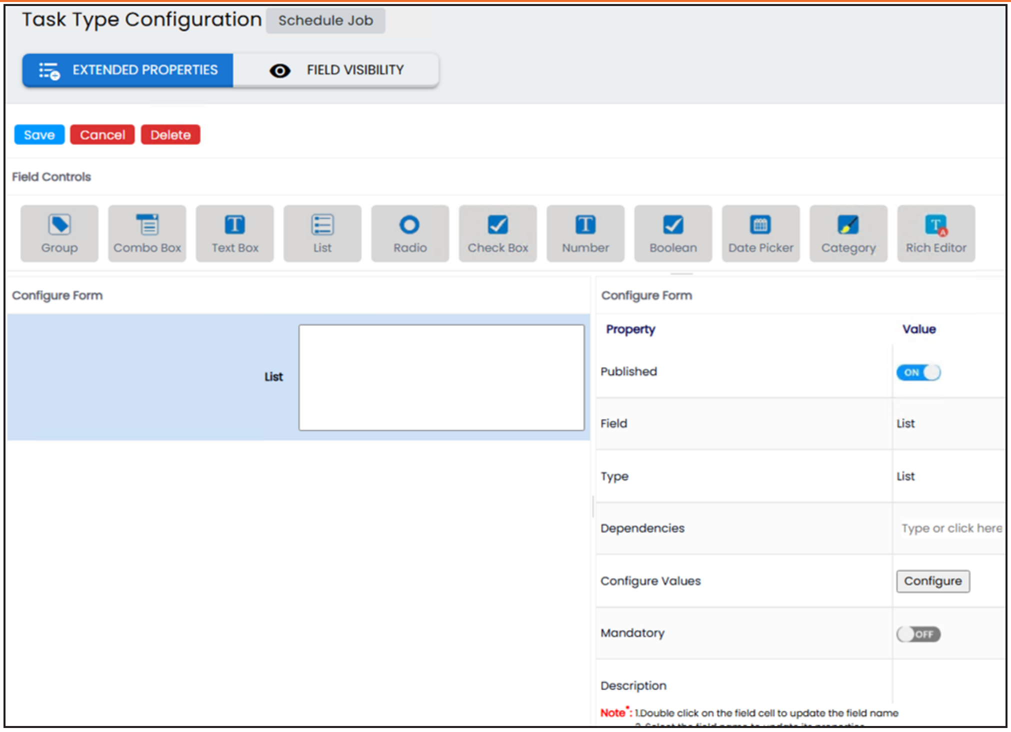
   The Task Type Configuration page appears. By default, the Extended Properties tab opens.



The Extended Properties tab contains the following sections:

- **Field Controls**: This pane displays the available UI elements.
- **Configure Form**: Use this pane to design forms using the UI elements available in the Field Controls pane.
- **Configure Form**: Use this pane to view and edit the properties of the UI element selected in the Configure Form pane.

2. Click **Edit**.
3. Double-click or drag and drop the required UI elements from the Field Controls pane to the Configure Form pane.
4. Select the required UI element one at a time and edit their properties in the Properties pane.



The available properties differ based on the type of UI element.

Refer to the following table for property descriptions:

Property	Description
Published	Switch the **Published** option to ON to publish the field.
Field	Specifies the field label. To change the field labels, double-click the corresponding Value cell. For example, List.
Type	Specifies the type of the field. To select field types, double-click the corresponding Value cell. For example, List.
Dependencies	Defines the pick list fields that can be used as controlling fields. It works only with the Reference Data Manager connector. To define pick list fields, select the fields from the drop down list.

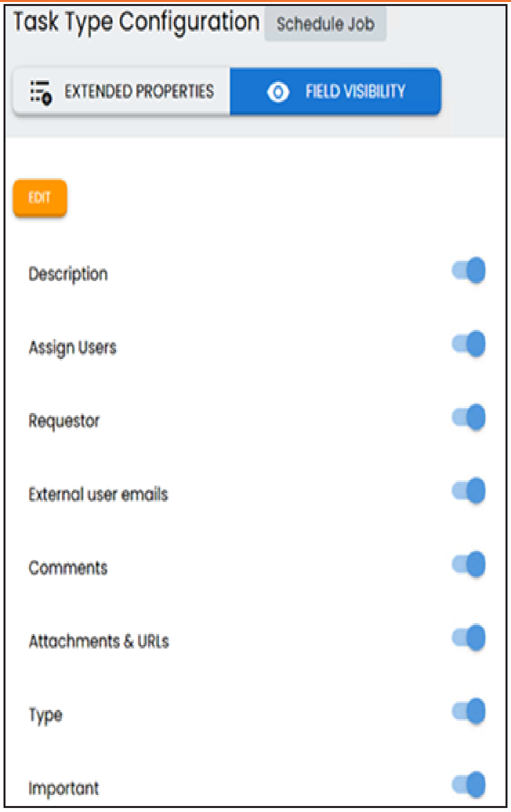
Property	Description
Configure Values	Specifies the connectors for the field. To enter option values, click **Configure**. Use the following options: ▪ [Default Connector](): Use this option to enter option values manually or using an MS Excel file. ▪ [Reference Data Manager](): Use this option to pull option values from reference tables in the Reference Data Manager.
Mandatory	Specifies whether the field is mandatory. Switch the **Mandatory** option to ON to make this field mandatory in a form.
Description	Specifies the field description. To enter field descriptions, double-click the corresponding Value cell.
Order	Specifies the order of the field on the Extended Properties tab. To enter the order number, double-click the corresponding Value cell. You can also drag and move fields in the Configure Form pane to change their order.

3. Click **Save**.

   The form is saved and available on the Extended Properties tab.

   To configure field visibility, follow these steps:

   1. Click the **Field Visibility** tab. It displays the default fields available for the task type.



2. Click **Edit**.
3. To make fields visible, switch on the required fields.
4. Click **Save**.

   The fields are configured.

Default Connector

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the default connector to import option values from an MS Excel file or enter them manually.

To configure option values using the default connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

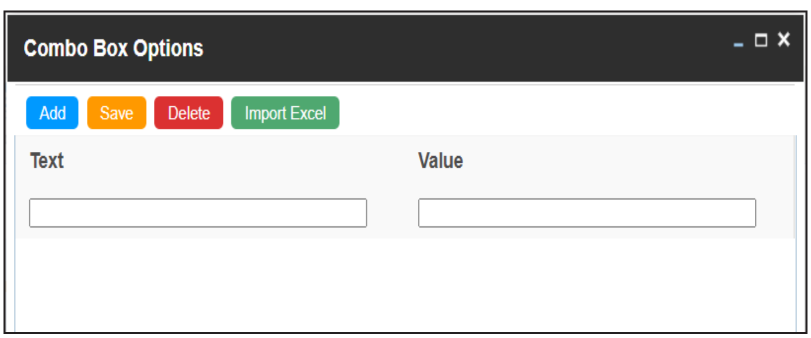
   Ensure that you are in edit mode.

2. In the **Properties** section, click **Configure**.

   The Connectors page appears.

3. On the **Connectors** page, ensure that the Default Connector option is selected. Then, click **Next**.

   The <UI_Element> Options page appears. For example, if the UI element is Combo Box, the Combo Box Options page appears.



4. Use the following options:

   Add

   Use this option to enter text and value manually.

   Import Excel

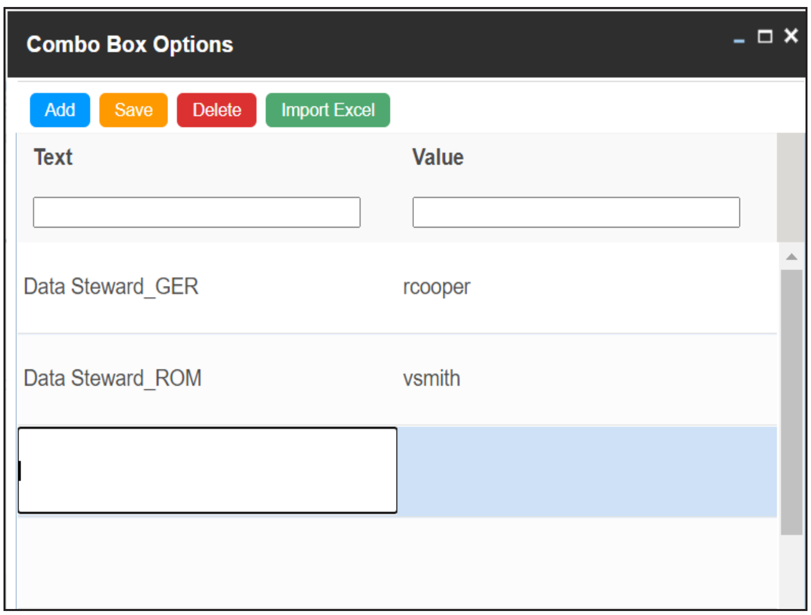
   Use this option to import options from MS Excel files.

5. After configuring option values, click **Save**.

To add option values manually, follow these steps:

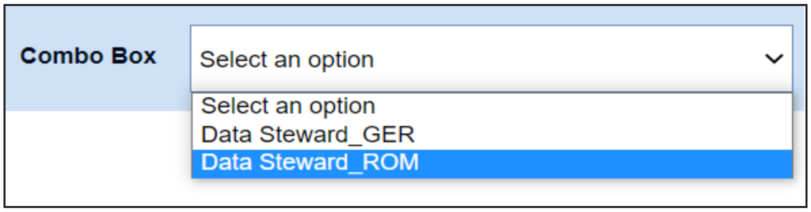
1. Click **Add**.
2. Enter values in the Text and Value fields.

   The Text corresponds to options whereas the Value corresponds to underlying value of an option. You can add as many values as needed.



3. Click **Save**.

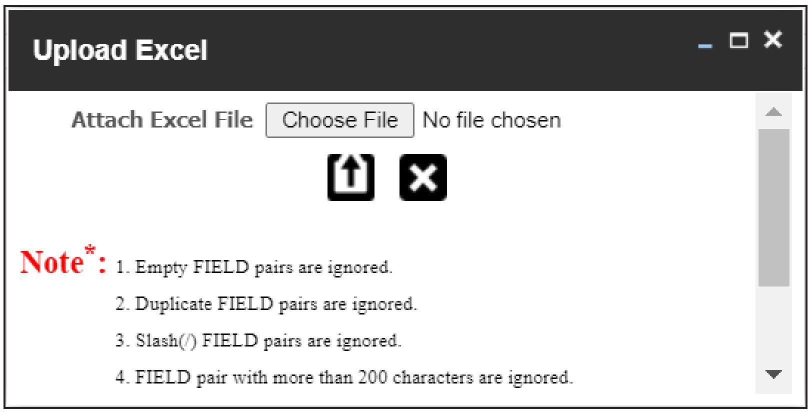
The option values appear in the UI element under the Configure Form section.



To import option values from MS Excel files, follow these steps:

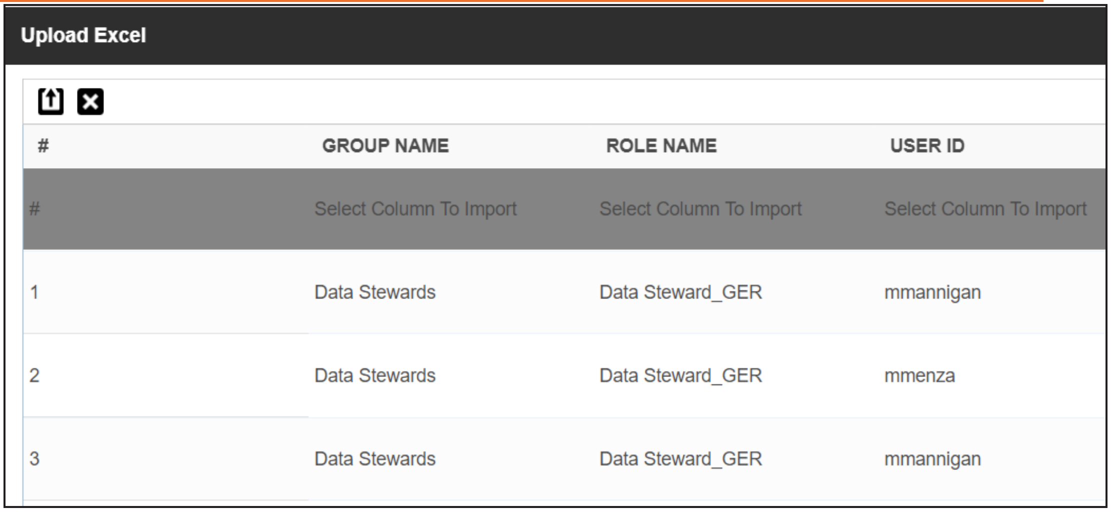
1. Click **Import Excel**.

   The Upload Excel page appears.



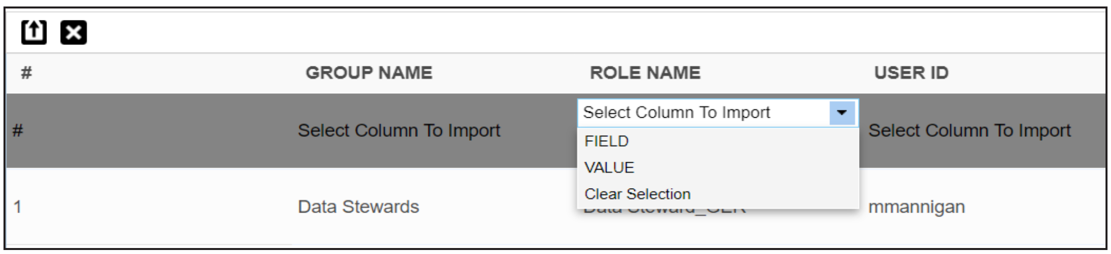
2. Click **Choose File** and select the required MS Excel file.

   The Upload Excel page appears. It displays the data in the MS Excel file.



3. Double-click the **Select Column To Import** cell in the required column.

   The available options appear.

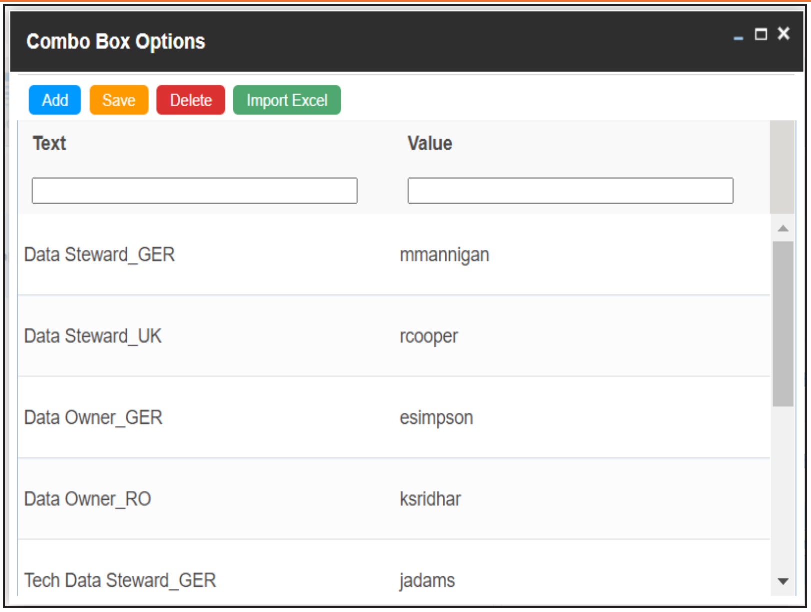


4. Select the appropriate option.

   Field corresponds to options and Value corresponds to value of an option. You can import multiple columns. Use Clear Selection to undo the selection.

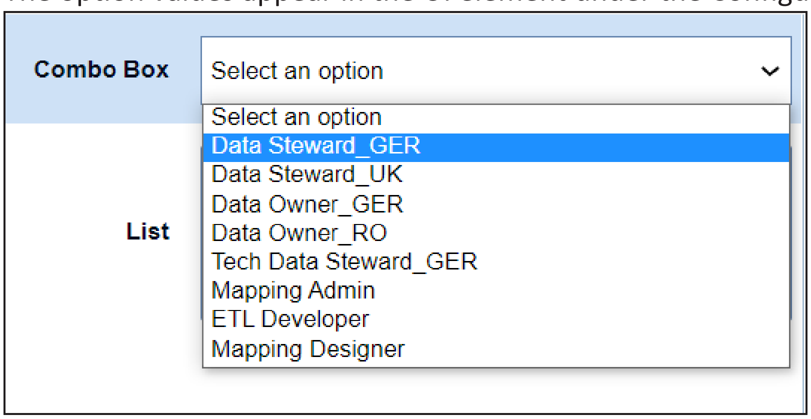
5. Click .

   The <UI_Element> Options page appears. It displays the imported columns. You can delete a row that is not required. To delete rows, click a row and then click **Delete**.



6. Click **Save**.

   The option values appear in the UI element under the Configure Form section.



Reference Data Manager

When you configure extended properties using UI elements, such as combo box, radio button, and list, you also need to configure their option values. You can use the Reference Data Manager connector to import option values from tables in the Reference Data Manager.

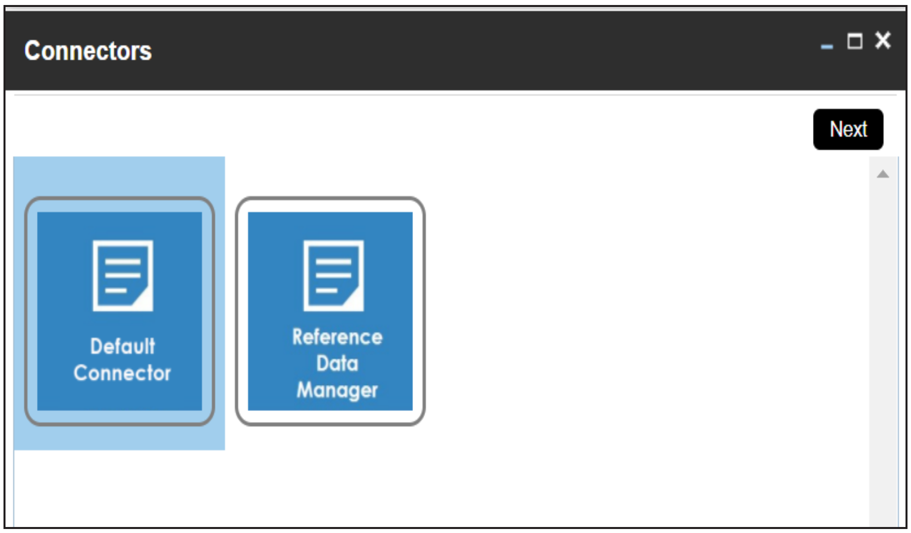
To configure option values using reference data manager connector, follow these steps:

1. In the **Configure Form** section, click the required UI element.

   Ensure that you are in edit mode.

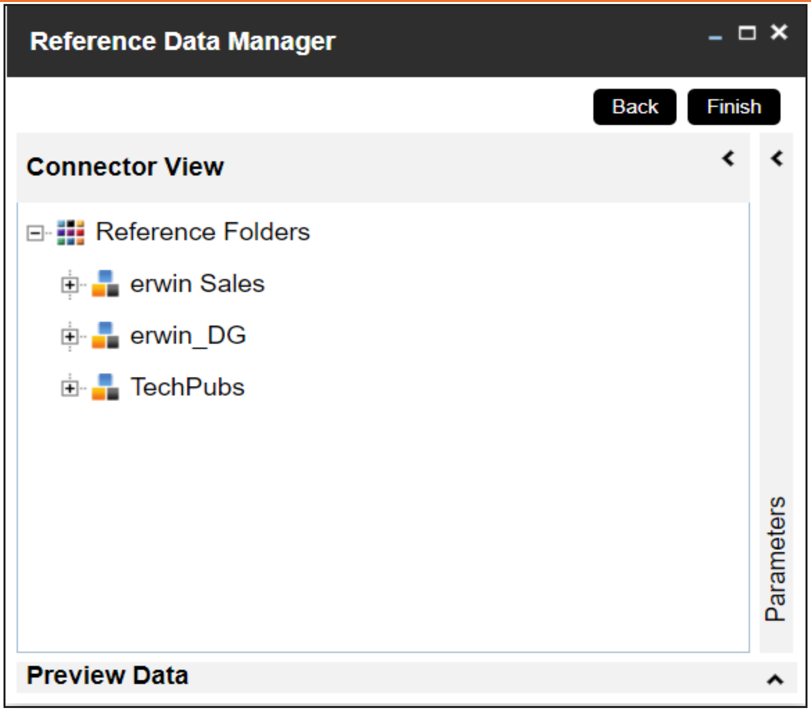
2. In the **Properties** section, click **Configure**.

   The Connectors page appears.



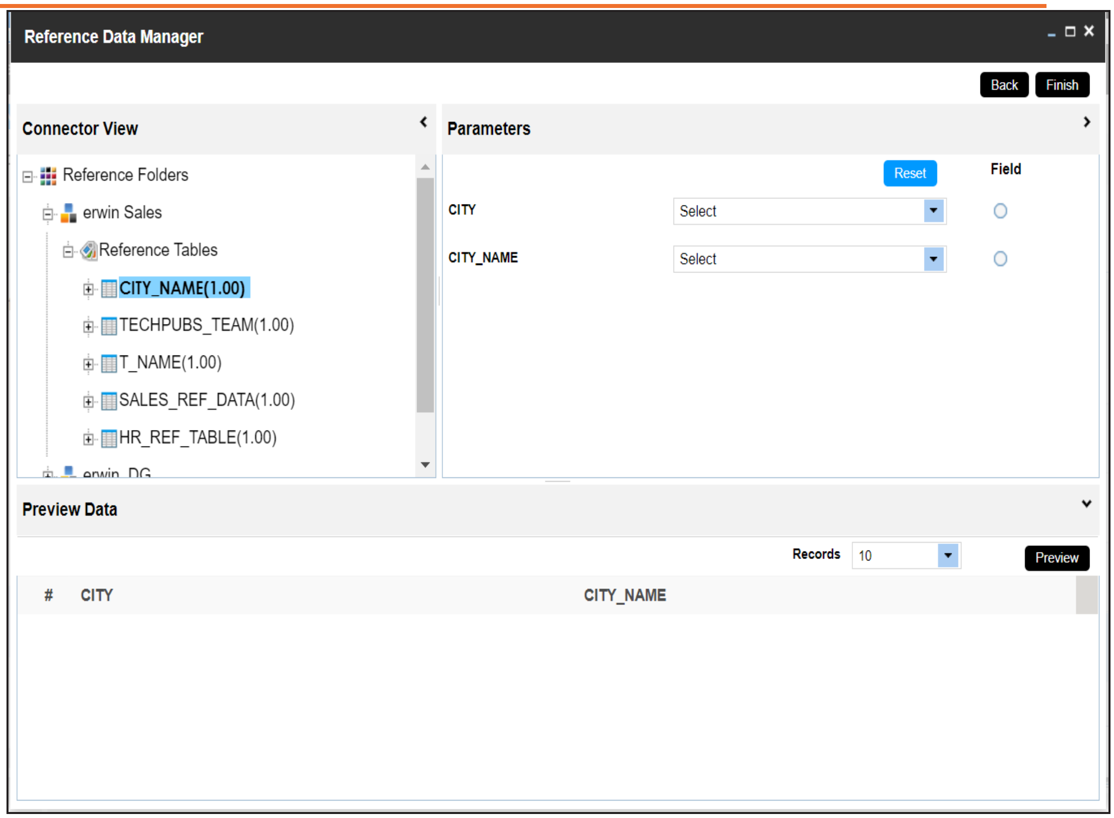
3. On the **Connectors** page, click **Reference Data Manager** and then click **Next**.

   The Reference Data Manager page appears. It displays the reference folders in the Connector View pane.



4. In the **Connector View** pane, expand a reference folder and select a reference table.

   The Parameters pane displays the columns in the reference table. You can also click Preview to view the data in the reference table.

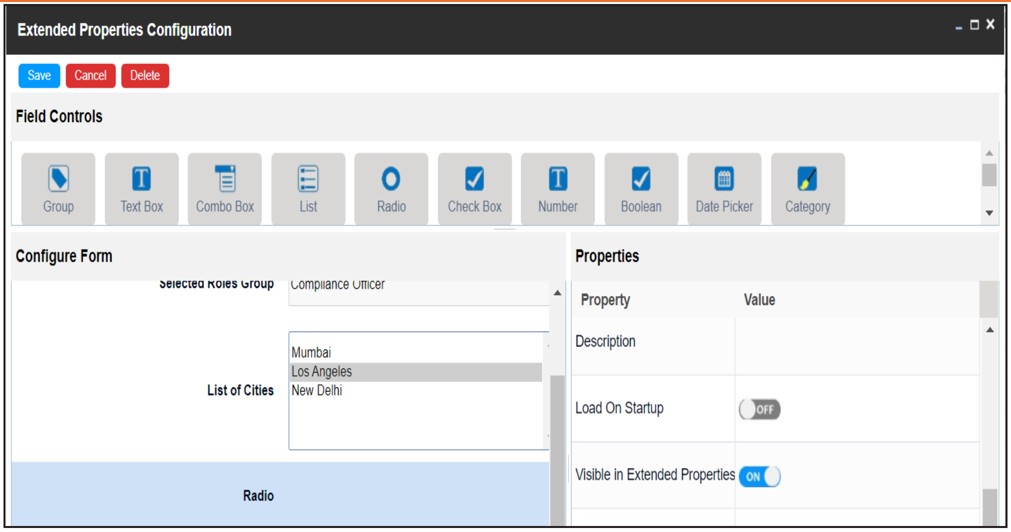


5. In the **Parameters** pane, click the radio button next to the required column.

   You can select the controlling field from the drop down option. Ensure that you define the required dependencies in the Properties pane and that the option values for controlling field are configured using the same reference column.

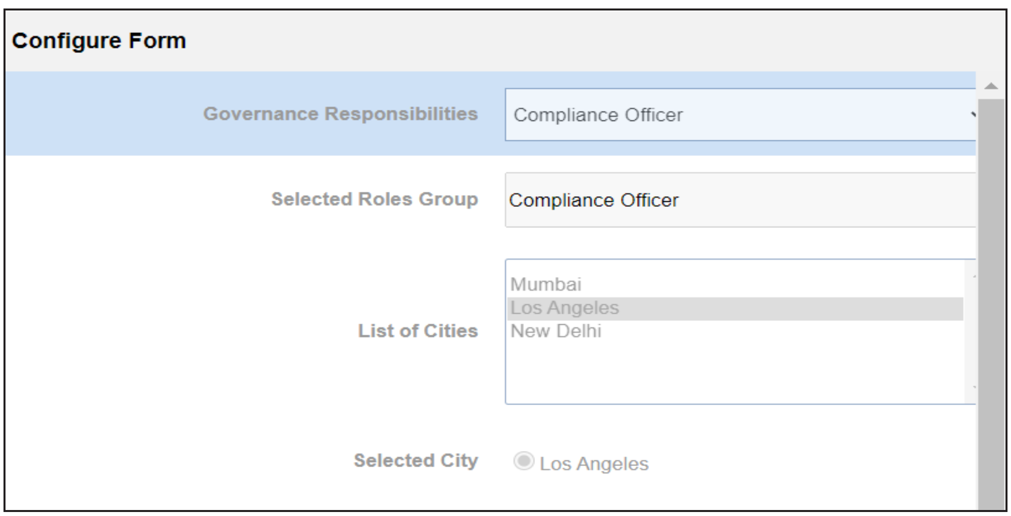
6. Click **Finish**.

   The Extended Properties Configuration page appears.



7. Under the **Properties** section, switch **Load on Startup** to **ON**.
8. Click **Save**.

   The option values are configured. For example, in the following form the List of Cities is the controlling field for Selected City. Both the fields get their option values from the same reference column.



Managing Tasks

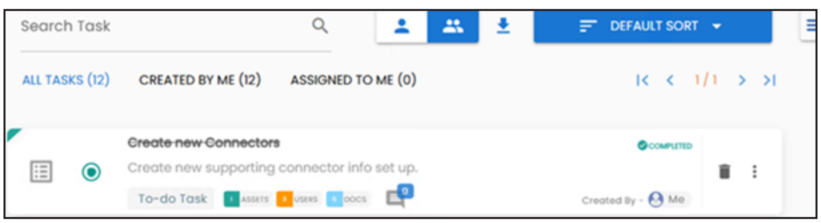
Managing tasks involves:

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

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

The task is moved to the list of completed tasks.

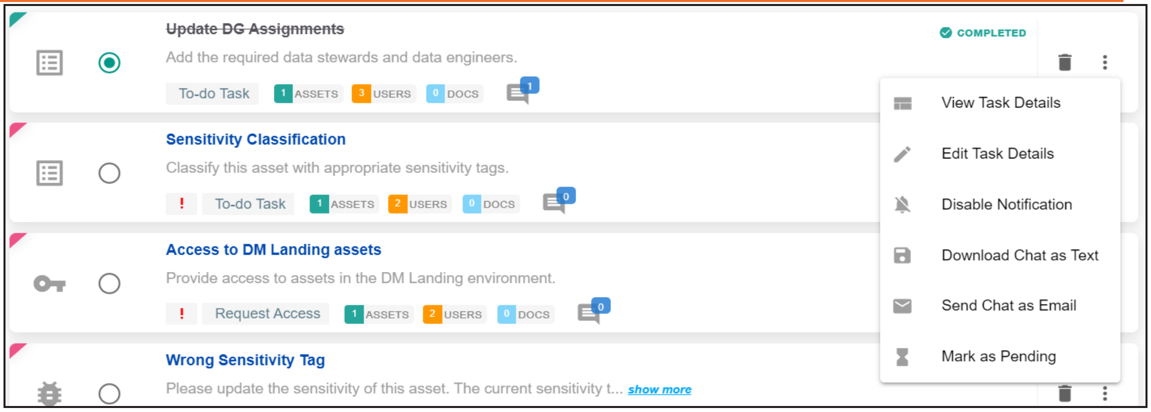
For example, in the following image, the task, Create new Connectors is marked as complete.



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.

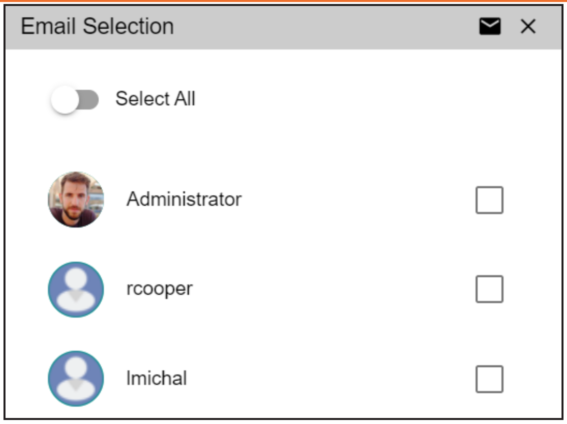
Download Chat as Text

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.