Action overview and basic actions

Via the menu tree under

MENU AND ACTIONS
--> Actions

administrators reach the action overview. Here, all basic actions, configurations and process links are clearly listed in a table - all elements can be **filtered** and **sorted** by name, action type or other criteria using the **full-text search, dropdown lists** or the **sort arrows**.

With the **search function** you can search for an action using various parameters.

- **Search by action type**
  The search by action type can be carried out using the following criteria: Action, Configuration, Process reference.
- **Search by name**
  Search for a specific action by its name (e.g. Wf_getMyToDos).
- **Search by description**
  The search criterion is a description of the action (e.g. form for managing public holidays).
- **Search by action folder**
  For the search by action folder, the installed Webdesk modules are available.

Depending on which **type of action** (action/configuration/process reference) is selected, more or less data can be edited in the following mask.

Editing basic actions

New actions can only be **configurations** of an already existing action, or **process references**.

If a new configuration is to be created, first select the corresponding action and click "**New configuration**" from there.
If a **process reference** is to be created, which allows a process definition to be integrated in the menu tree, click the "**New process link**" button.

- Depending on the procedure described above, the **action type** is automatically preset to Configuration or Process reference
- **Name**
  Name of the new action/configuration
- **Heading**
  Heading for the new action/configuration

After saving, you receive a confirmation from the server and an overview of possible settings, permissions, files and text modules.

"Settings" tab

Here you will find various options that affect the basic behavior of the action:

Description	Space for a more detailed description of the action as well as its function and behavior
Action folder	Specification of the action folder to which the action is to be assigned. The action folders are roughly divided according to the various Webdesk modules (e.g. action belongs to the Project Time module -> action folder "ptm")

Menu icon	Selection of the menu icon with which the action is displayed in the menu tree.
Custom menu icon for classic view	Selection of the menu icon for display in the classic view (1. Select collection -> 2. Select icon)
Overwrite action metadata on software update	Selection Yes/No: Should changes made by the user to the action (title, description, menu icon, classic image, classic image collection, permission for all clients) be overwritten by the default settings during a software update?
Inherit permission to the following action	Option to define an action for which the same permissions are to apply as for the current action
Default roles	List of those roles whose holders automatically have a permission for the action
Unsupported viewports	By ticking the corresponding checkbox, access to the newly configured action can be blocked for certain platforms (mobile, tablet or desktop)
HQL permission query	
Always open in new window	If this checkbox is ticked, the new action is always opened in a new browser window when called up
Is experimental	Here the new configuration can be marked with the "experimental" attribute
Prevent execution for switched users	If this checkbox is activated, the action can only be executed by the user themselves and not by administrators who have switched to this user
Use the following template	This option is developer-specific and not relevant for the user/administrator in the day-to-day use of Webdesk
Controller/Controller pattern	This option is developer-specific and not relevant for the user/administrator in the day-to-day use of Webdesk
Number of users (max. licensed)	This shows how many users are currently authorized to use this action. Below it, a limit is displayed for how many users the corresponding Webdesk license is valid

"Permissions" tab

Here you will find an overview of all permissions granted for this action as well as the option to grant new permissions. This works either as a **collective permission** via the checkbox "Permission for all clients" (see below) or, to enable individual assignment, via **various permission types.**

- **Checkbox "Permission for all clients"**
  If this checkbox is activated, **all persons of all clients** receive the permission to execute the action. This makes particular sense for basic actions with many (or all) users, as the individual assignment of person/group/client permissions is then no longer necessary.
  The dropdown list is used to define the competence target (view permission)[1] for the collective permission.
- **Specific permission**

If only individual clients/groups/persons/roles are to be able to execute the action, a detailed permission can be granted via the "New action permission" button; more on this under Granting and controlling permissions[2]

"IP Restrictions" tab

Here, access to the action can be blocked for individual IP addresses within the system or access can be granted to them. The following fields must be filled in:

Type	Selection of the restriction type: **Single:** Exclusion/permission of a single IP address **Range:** Exclusion/permission of an IP range (from-to, start and end address) **Subnet Mask:** Exclusion/permission of a subnet mask
Start address	Single: Enter the IP address to which the block/permission applies Range: Enter the IP address with which the range is to begin
End address	Range: Enter the IP address with which the range is to end
Subnet mask	Only for type "Subnet Mask": Enter the subnet mask to which the block/permission applies
Allow access	If this checkbox is ticked, the specified IP address/range/subnet mask is given permission to access the action

"Parameters" tab

These parameters are relevant for the development of Webdesk, but can be ignored in day-to-day work with Webdesk EWP.

"Files" tab

If, for example, the action to be edited is of the type "**Configuration**", several files can be assigned to the action. Each time it is saved, the file is persisted in the database as a new version. When a new action is created, this tab is empty.

"Text modules" tab

Shows all existing text modules. This is where new text modules (text blocks) or translations are created. If necessary, you can edit a text module directly from here by clicking the "Edit" button.

For **translations** it is recommended to replace the text module with a technical key: e.g. Date > becomes "AccountEvaluation_Date01". The desired translation is then entered for the corresponding language. Proceed in this way with every text module of every action/configuration until all are translated. It is recommended to leave the flag "Overwrite action metadata on software update" unchecked, as the text modules would otherwise be reset to the default value.

"Configurations" tab

Here you will find an **overview** of all **configurations derived from this action** as well as the associated details and direct links to the configurations.

"Help texts" tab

On this tab you can integrate **help texts** that match the action and can be called up by the user of the action in the header bar. It is also possible to set a URL link to an external system, for example a website with tutorials or further descriptions. Separate help text fields exist for each language that has been created.

"Access rights" tab

This option concerns future Webdesk developments and is currently not relevant for the user/administrator.

Deleting an action

To delete an action, select the action concerned from the action overview table (click it). The title bar contains the "**Delete**" button - click it.

As a security check, a popup appears asking whether you really want to delete the action. Clicking the **OK button** deletes the action from the directory.

1. /daisy/webdesk-manual-admin/2656-dsy.html?language=4
2. /daisy/webdesk-manual-admin/8588-dsy.html?language=4