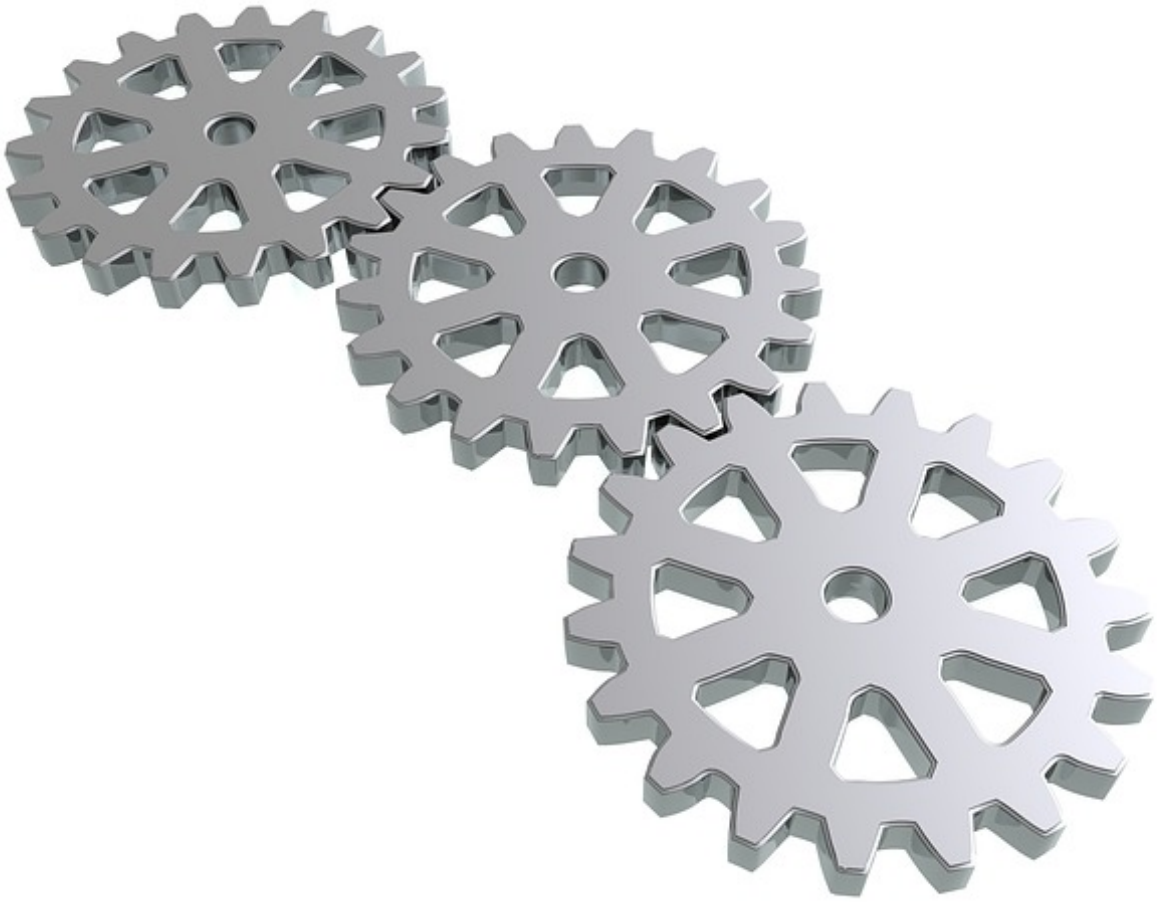
Configurations

NOTIZ

Not every action in Webdesk EWP is a configurable action! Configurable actions can be recognized by the "New configuration" button in the corresponding column of the action overview table.

Configurations most likely make up the majority of your Webdesk system. They are configured **variations** of configurable actions, **adapted** to your own wishes. An **unlimited number of configurations** can be derived from each configurable action and integrated into the menu tree as separate "apps".



In a specific configuration, you can determine which and how many fields are displayed to the user. This makes it possible to adapt **forms** or **presented information** to the needs and wishes of individual users or user groups. Examples of this are:

- A new **group calendar**, but only the vacation days of my department are visible to me
  -> Configuration derived from action **ta_getGroupCalendar.act**
- A **time booking window** with additional, special failure reasons
  -> Configuration derived from action **ta_doBooking.act**
- An **evaluation list** of project times with selected information
  -> Configuration derived from action **ptm_getOrgProjectEfforts**

Creating and editing configurations

There are basically **three ways** to open the editing window for a new configuration:

1. Directly from the action overview

In the menu tree under Menu and actions --> Actions: click the blue "New configuration" button and select the basic action to be configured

2. From the action overview table
In the menu tree under Menu and actions --> Actions: search for and select the configurable basic action in the table - click "New configuration" in the corresponding table column

3. From the action editing window
In the menu tree under Menu and actions --> Actions: select the configurable basic action by clicking the corresponding table row or the

button. Settings tab -> "New configured action" button

In each of these three cases, **two fields** must be filled in first:

- **Name:** unique name of the new configuration, ideally with a module description (e.g. "ta_MyHolidayCalendar")
- **Heading:** descriptive name of the new configuration; this also appears in the menu tree (e.g. "My vacation calendar")

After clicking **"Save"**, the new configuration is saved and numerous further **options (see below)** appear.

Once the configuration is complete, the settings are applied by clicking **"Save"** or **"Save and Close"**, and the new action configuration can be added to the menu tree.

"Settings" tab

Description	More detailed description of the action configuration and its functions
Action folder	Assignment of the action folder in which the new configuration can be found in the overview. Normally this is the same action folder as that of the master action (default value)
Menu icon	Selection of the icon with which the configured action is displayed in the menu tree
Menu icon for classic view	Selection of the icon with which the configured action is displayed in the menu tree of the classic skin
Overwrite action metadata on software update	If "Yes" is selected here, the personal settings for the configuration are overwritten during a software update and the default values are restored
Inherit permission to following action	Here a further action can be specified for which the same permissions apply as for the newly created one
Default roles	Here there is an overview of the roles that automatically receive a permission to execute the newly configured action
Unsupported viewports	By ticking the corresponding checkbox, access to the newly configured action can be blocked for certain platforms (mobile, tablet or desktop)
EDIT CONFIGURATION DETAILS	Clicking this button takes you to the action-specific settings for personalization and configuration. These configuration options differ for each configuration

	and are described module by module for the respective action.
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
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

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The options **"Use the following template"**, **"Controller"** and **"Controller pattern"** are **advanced developer options** that should only be used in consultation with Workflow Systems GmbH. For further information, please contact us directly.

"Permissions" tab

Here you will find an overview of all permissions granted for this configuration 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 configuration. This makes particular sense for configurations 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 configuration, 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 configuration 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.

"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.

Felder

Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_editAction.act
Artefakt-Typ	Action

1. /daisy/webdesk-manual-en/admin/po-overview/5479-dsy/2656-dsy.html
2. /daisy/webdesk-manual-en/admin/po-overview/5479-dsy/8588-dsy.html