

Manual

Everything about working with DeciDesk: from the organization structure and actions to projects, meetings and the archive.

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What is DeciDesk

1.1 What DeciDesk records

DeciDesk records what is decided in a meeting, who gets which action item and when it must be done, and follows that until it is ticked off. Every agreement therefore always lives somewhere: with a meeting, with an action, or in the archive. There is no in-between step where something can linger without an owner.

Everything in DeciDesk comes down to three questions: what was agreed, who has it, and when must it be done.

1.2 The parts

PART	WHAT IT IS
Structure	The organization chart of your company: who works under whom. It determines who sees what and to whom you can hand out work.
Action	A piece of work that one person ticks off, with an owner and a deadline.
Project	An action with smaller actions underneath it. The project keeps its own owner, deadline and history.
Meeting	A meeting in DeciDesk: who takes part, the conversation (chat and recordings), the summary and the action items that come out of it.
Series	A meeting that repeats, for example every Monday. Each time is its own meeting (an episode), with the report of the previous time next to it.

ACTION AND PROJECT

An action is a piece of work that one person ticks off. As soon as you hang actions underneath it, it is a project. There are no other kinds, and a project can in turn contain projects; there is no limit to that.

The organization structure

2.1 The line

DeciDesk works with people, not with departments or teams. Everyone in the organization sits under exactly one manager; together that forms a tree from the board to the shop floor, in as many layers as your organization really has. That tree is called the line, and it determines two things:

- **Seeing.** You see your own work and the work of everyone below you, all layers deep. Whoever is above you sees your work in the same way.
- **Handing out.** You give work to yourself or to anyone in a layer below yours, in whichever branch. When a layer is skipped, the direct manager of the receiver always gets a notification: the line is never passed unnoticed.

In short: **seeing follows your own branch, all layers deep; handing out may reach any layer below yours.** Whoever stands above the receiver stays responsible for the work and can therefore always follow it.

2.2 Building the organization chart

The organization chart lives under **Organization > Structure**. Administrators build and maintain it:

- **The first person.** In the Still to assign list, click Assign next to a person and choose At the top of the line. That person becomes the top of the tree.
- **Everyone below.** Drag a person onto the card of their manager, or use Assign and pick the manager from the list.
- **Moving people.** Dragging always works, also later. Whoever moves a person automatically takes their whole branch along.
- **Multiple tops.** An organization can have more than one top, for example two directors side by side.

Building and rearranging the structure sends no notifications: you can set up and rebuild the tree in peace.

2.3 Inviting people and roles

You invite new colleagues under **Organization > Users**. With the invitation you immediately choose the manager, so someone lands in the right place in the tree at their first sign-in. There are three roles:

ROLE	MEANING
Member	Works with their own actions, projects and meetings, within what the line shows.
Administrator	Additionally manages the structure and the users, and sees everything within the company.
DeciDesk Owner	Like an administrator, plus billing and the organization settings.

Seeing and handing out in practice

2.4 What the line means for each role

An example with four layers: Emma leads the company, Daan works under her, Lars under Daan, and Nora under Lars.

- **Emma** (layer 1) sees the work of Daan, Lars and Nora, and can hand out work to all three directly.
- **Daan** (layer 2) sees the work of Lars and Nora, and hands out to Lars and Nora.
- **Lars** (layer 3) sees the work of Nora, and hands out to Nora.
- **Nora** (layer 4) sees only her own work.

When Emma hands something directly to Nora, Lars gets a notification: work has been placed with someone below him. He remains the manager, sees the action in his overviews as usual and can reassign it if needed. This way a decision from the top can land directly with the person who will do the work, without sidelining the layers in between.

WHY DOWNWARD YES AND UPWARD NO

Handing out to someone beside or above you is not possible: work in an organization goes from top to bottom, and whoever hands it out must be able to oversee it. Downward any depth is allowed, but never unnoticed: the manager of the receiver always hears about it.

2.5 The exception: the meeting

There is one deliberate exception. In a meeting, the person who assigns the action items may assign to all participants of that meeting, even when they stand beside or above him in the line. The decision was taken there together, so the work may be placed directly with whoever will do it. Outside the meeting the layer rule simply applies again.

Actions

3.1 What an action is

An action is a piece of work that one person ticks off. Every action has:

- **An owner:** the person who has the work. Always exactly one person.
- **A deadline:** when it must be done.
- **A creator:** whoever created it. The creator can always keep following the action, even when the work sits somewhere else.
- **A status:** Open In progress Done or Archive. Only the owner or someone above them sets the status; nothing is ever ticked off automatically.

3.2 Creating an action

Actions come into being in three places:

- **On their own**, via the button on the Actions page: title, owner, deadline, and optionally a description.
- **From a meeting:** manually, or by accepting an AI suggestion (chapter 5). The action stays linked to the meeting, so it is always clear where it came from.
- **In a project:** as part of the project (chapter 4).

You choose the owner from yourself and everyone in the layers below you. Whoever is assigned an action receives a notification with title and deadline; when the assignment skips a layer, the direct manager of the receiver hears about it too (chapter 2).

3.3 Passing on and reassigning

Work moves in two ways, and it always stays the same action with the same history:

- **Passing on.** The owner passes the action to someone in a layer below them, via the Assign to field on the action page. That way work gets placed more concretely along the way.
- **Reassigning.** Whoever stands above the owner can move the action: to themselves or to someone else, for example in case of illness or departure.

Passing on makes no copy: there is always one action, with one owner and one status. When the last owner ticks it off, it is done for everyone.

Deadline and postponement

3.4 Who sets the deadline

The deadline belongs to handing out: whoever gives the work says when it must be done. After that, only the responsible person above the owner (or an administrator) can change the date. The owner cannot move their own deadline, and that is deliberate: otherwise every deadline becomes optional.

3.5 Asking for postponement

When a deadline cannot be met, the owner asks for postponement, right on the action:

- The owner writes an update, ticks **Propose new deadline** and picks a date with an explanation.
- The responsible person sees the proposal on the action and approves or declines it with one click.
- On approval the deadline moves, and the whole conversation stays in the updates as the record.

WHY THIS RULE

Postponement is allowed, but only visibly and agreed. Because the proposal sits on the action itself, the agreement about the new date can be found later just as easily as the original deadline.

3.6 Updates, description and notes

- **Updates** are the progress messages on the action, for everyone who sees the action. They can be typed or **spoken**; spoken updates are transcribed automatically.
- **The description** records what exactly is meant: the what and why.
- **Notes** are personal scratch work of whoever opens the action; they are visible on that page only.

3.7 Reminders around the deadline

DeciDesk watches the date by itself: the owner gets a reminder when the deadline comes close and a signal when it passes. The responsible person sees overdue work in their own overviews and in the week status (chapter 7).

The timeline: who did what, when

3.8 The timeline

Every action page has a timeline that records what happened from the very first moment, in plain sentences. It cannot be edited and cannot be erased: even when a part is removed later, the timeline keeps what it was and who had it.

EXAMPLE OF A TIMELINE

Lars ticked off this action

24 Sep 2026, 16:02

Daan assigned this action to Lars

22 Sep 2026, 09:15

Emma assigned this action to Daan

21 Sep 2026, 10:40

Emma created this action

21 Sep 2026, 10:38

Other sentences you may come across: *Daan turned this action into a project*, *New action for Nora Visser: Review the draft budget*, *Sven removed the action for Milan: Request the old quotation*, and *Lars reopened this action* when finished work had to come back after all.

3.9 Recurring actions

Work that returns every week or month you set up once. When creating it, tick **Recurring** and choose the rhythm: daily, weekly on fixed days, or monthly on a date or a fixed weekday, optionally with an end date.

- As soon as the current one is ticked off, the next one is ready automatically with the right deadline.
- The series can be paused, changed or stopped from any action in the series; what already exists simply stays.

The Actions page

3.10 Reading and filtering

The Actions page shows everything you are allowed to see, grouped by status. The filters sit at the top:

- **Mine / Others / All:** only your own work, only your people's, or both.
- **Person:** filter on one of your people. The page switches to Others by itself.
- **Status and search:** by status group, or free search on title, meeting or owner.

Actions that are part of a project do not appear loose in the list: you see the top of each tree, and the work underneath it lives on the project page itself. When you search or filter, everything is searched flat so nothing becomes unfindable.

3.11 Deleting

Deleting is reserved for the responsible person above the owner or an administrator, always with a confirmation first. If the action was part of a project, the timeline of that project records who deleted which action and whose it was. For work that is simply finished, deleting is not needed: it moves to the archive by itself (chapter 8).

RULE OF THUMB

Ticking off is the normal way, archiving happens by itself, deleting is the exception. That keeps the history complete.

Projects

4.1 From action to project

Sometimes an action turns out to be more work than one person can tick off. Then you split it up: you add the first action underneath it, and from that moment it is a project. It stays the same item, with the same owner, the same deadline and the same timeline; there is simply a list of actions underneath it now, and the page shows them as a table. The way back exists too: a project without open parts can become a plain action item again.

You can also start a project on its own, via **Projects > Create project**: a name, an owner and optionally a deadline. The actions follow naturally.

4.2 The rules

- **A part is never done later than the whole.** The deadline of an action in the project stays within the deadline of the project. DeciDesk guards that everywhere: when adding, when editing and in postponement proposals.
- **The project does not tick itself off.** The progress bar shows how many parts are done, but only the owner decides when the whole is truly finished.
- **A project with open parts cannot be closed.** As long as an action is open, DeciDesk accepts no Done or Archive on the project.
- **Whoever has work in the project belongs to the project.** There is no separate member list: the owner and everyone with an action in the tree together form the project.

4.3 Projects inside projects

When a part itself turns out bigger as well, it becomes a project inside the project in exactly the same way. There is no limit to that:

EXAMPLE

New website live on 1 March **Project** Timo Berger **In progress**

- └ Rewrite the copy Lars Jansen **Done**
- └ Arrange photography **Project** Lars Jansen **Open**
 - └ Book the photographer Nora Visser **Open**

The project page and the overviews

4.4 The project page

The project page shows everything at a glance: the actions as a collapsible table with the owner, deadline and status per row, a progress bar, the meetings attached to the project, and the timeline. Nested projects fold open and closed with an arrow, like folders in a file explorer.

The table shows at most five layers at once. When a branch goes deeper, it says **There is more under this project** with the button **View the full structure**: a page of its own that shows the whole tree from top to bottom, however deep it goes. Every row clicks through to that action or project.

4.5 The Projects page

The Projects page shows the projects you are allowed to see, as a tree. Everyone sees their own top: the director sees the layer-one project with everything underneath it; a team lead sees the highest project within their own part of the organization. Search looks through the whole tree.

4.6 Meetings on a project

When you attach a meeting to a project (chapter 5), the people of the project take part automatically, and the meeting appears on the project page. Action items you create in such a meeting land in the tree of the project by themselves.

FOR THE RESPONSIBLE PERSON

Whoever handed out a project never has to chase anything: the project page shows all layers at once, including what is done and which deadline is at risk. Supervision takes no action at all; only the owners update the actions and tick them off.

Meetings

5.1 Creating: people and a question

You create a meeting with a title, the people you invite and optionally the question that needs an answer. You invite people, not groups; whoever creates the meeting takes part automatically. Invitees get a notification and see the meeting in their overview.

- **Under a project:** choose the project when creating. The people of the project join automatically; extra guests you add separately.
- **Adding guests later:** click the participant counter on the meeting page and add someone. For a recurring meeting you then choose: only this time, or every time from now on.

5.2 The conversation

- **Chat:** the conversation of the meeting, with @mentions to address someone. Everything stays with the meeting.
- **Attachments:** documents that belong to the meeting, attached directly to it.
- **Recording:** record the meeting with a phone, or let the note-taker bot join an online meeting. The recording is transcribed automatically and appears as a transcript in the conversation.

5.3 What the AI does

- **Summary:** one click and the AI summarizes the whole conversation, including transcripts of recordings.
- **Action suggestions:** on request the AI suggests action items based on what was discussed, with a sensible owner and deadline. You accept them with one click, adjust them or skip them; no action ever comes into being without a person looking at it.

Statuses and management

5.4 The status of a meeting

Every meeting has a status. DeciDesk keeps it up to date automatically, following the course of the meeting:

STATUS	MEANING
Open	Input or a decision is still needed.
In execution	The decision has been taken; actions are still open.
Finished	Decided and handled. This also happens by itself as soon as the last action from the meeting is ticked off.
Archive	History: out of view by default, always findable.

When the AI is in doubt, it chooses Open. Setting the status yourself is always possible via the status pill; the AI then leaves it alone until new messages arrive.

5.5 Who manages the meeting

Changing the status, adding participants and deleting the meeting is reserved for whoever is involved in the meeting: the creator, participants or managers of participants with responsibility of their own, and administrators. Deleting always asks for a confirmation; for an episode of a series you then choose whether only this time is cancelled or the whole repetition stops.

ACTION AND MEETING STAY LINKED

Action items from a meeting stay linked to that meeting. From the action you click back to the meeting it came from, and on the meeting you see what happened to the decisions.

A meeting in practice

5.6 A meeting in practice

This is how a meeting runs from start to finish:

- Emma creates the meeting with her three responsible people and the question: do we switch to the new planning system.
- The conversation runs in the chat; the in-person meeting is recorded and transcribed.
- The AI summarizes and suggests three action items. Emma accepts two and adjusts the third.
- The actions land with the right people, each with a deadline. The meeting switches to In execution.
- Two weeks later the last action is ticked off; the meeting sets itself to Finished, and a week later everything sits in the archive.

Nobody sent around a minutes document, and yet everything can be found afterwards: what was said, what was decided, and what came of it.

Recurring meetings

6.1 Creating a series

For standing meetings (the Monday meeting, the monthly management meeting) you tick **Recurring** when creating and choose the rhythm, just like with recurring actions. The meeting of that moment is the first episode; everyone you invite is a standing member of the series.

- Every next episode appears **automatically in the night of the day itself**, with the standing members in it. Your meeting list therefore never fills up with future appointments.
- As soon as the new episode appears, the previous one moves to the archive. There is always exactly one current episode.
- All episodes share the same name; the date next to the title says which one you are looking at.

6.2 The report of the previous time

From the second episode onward, a button with the date of the previous time sits at the top right. It opens a readable report, composed automatically from that conversation:

- **A heading per subject** with what was discussed and where it ended up.
- **Decided:** only for real decisions; a question or a division of tasks does not count as a decision.
- **Actions from this series:** everything agreed in earlier episodes that is still open, plus what has been finished since the previous time. An action from three episodes ago stays here too, until it is finished or archived.

6.3 Members and guests

Standing members sit in every episode and can read the report of the previous time. A guest you add to one episode; they see only that one time, and therefore not what was discussed earlier in the series. When adding, you choose the difference literally: **only this time** or **every time from now on**.

Overviews and notifications

7.1 Dashboard and Deadlines

- **Dashboard:** your starting point, with the meetings you spoke in most recently and your next deadlines.
- **Deadlines:** all open work by date, from overdue to later, with the same Mine/Others/All filters as the Actions page. For responsible people this is the watch list of their own branch.

7.2 Notifications

DeciDesk notifies you of what concerns you, in the app and by mail: work assigned to you, an invitation to a meeting, an approaching or passed deadline, a postponement proposal waiting for your approval, and an action item of yours that became a project. Security mails (such as password matters) always come immediately.

7.3 Week status and daily summary

Whoever has people below them receives the week status on Monday morning: what is open with their own direct people, what is overdue and what must land this week.

Next to that there is the daily summary by mail, for whoever has it switched on. It follows two fixed rules:

- **Notifications appear exactly once.** Every summary contains only the notifications that arrived since the previous summary. What was in yesterday's mail does not return today.
- **Deadlines stay until the work is done.** The deadline overview shows all open work that is overdue or must be done by the end of next week, sorted by urgency. As long as that action is open, it returns in every summary; a deadline further away appears once it enters that window.

When there is nothing new to report and no deadline approaches, no mail is sent that day.

7.4 Mail days

Not everyone sits behind their mail every day. Per person the administrator sets **mail days**: the days on which someone receives mail from DeciDesk. A driver who only has office time on Tuesday and Friday gets his messages bundled on the next mail day; in the app everything stays visible immediately.

Visibility, security and the archive

8.1 Who sees what

YOU ARE	YOU SEE
Employee	Your own work and the meetings you take part in.
Manager	Additionally all work of everyone below you, all layers deep, and the meetings your people take part in.
Creator	An action you created you can always keep following, wherever the work sits.
Project owner	Everything inside your project, including work of people outside your own branch. You can also manage and reassign that work.
Project member	The project you have work in, including its meetings.
Administrator	Everything within the own company.

8.2 Security

All content is stored encrypted: titles, chat messages, summaries, transcripts, updates and attachment names. Access always runs through the rules above. Requests under the GDPR, such as access or deletion, DeciDesk handles on request. Accounts of departed employees are deactivated, never erased: their name stays visible in old timelines and reports, but their access stops completely, including to recurring meetings they were a member of.

8.3 The archive

WHAT	WHEN	WHERE TO
Ticked-off action	Seven days after finishing	Archive, findable via the status filter
Finished project	Seven days after finishing	Archive, via the status filter on the Projects page
Finished meeting	Seven days after finishing	Archive, with chat and summary intact
Episode of a series	As soon as the next one appears	Archive; the report stays reachable

In the archive everything stays fully preserved, including the timeline, and it can be found via the status filters. Nothing is erased.

Glossary

TERM	MEANING
The line	The organization chart: everyone under exactly one manager. Determines seeing (your own branch, all layers deep) and handing out (any layer below yours).
Action	A piece of work that one person ticks off, with owner and deadline.
Owner	The person who has the work now and ticks it off.
Creator	Whoever created the action; can always keep watching.
Responsible person	Whoever stands above the owner in the line and oversees the work.
Passing on	The owner passes the action to someone in a layer below them.
Reassigning	A responsible person moves work from above, for example in case of illness.
Splitting up	Hanging actions under an action; that makes it a project.
Project	An action with actions underneath it. Nestable without limit.
Timeline	The fixed history of an action or project: who did what, when.
Series	A recurring meeting; every time is an episode.
Report of the previous time	The automatic overview per episode: subjects, decisions and open actions from the series.
Mail days	The days on which someone receives mail from DeciDesk; the rest is bundled.
Archive	Where finished work goes after seven days. Nothing is erased.