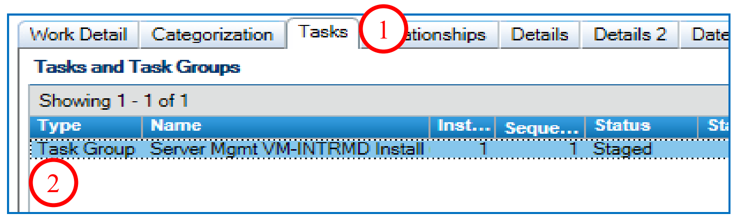
REMEDY ITSM -TASK MANAGEMENT
TASK CREATION

TASK MANAGEMENT

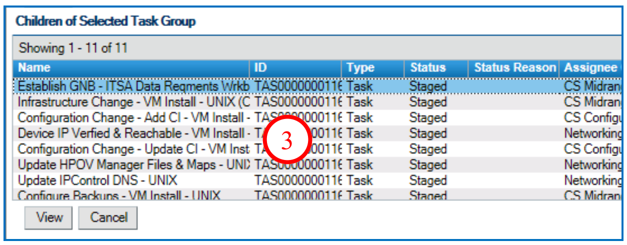
A Task can be added to a fulfillment record as a predefined single task, a group of predefined tasks, or an ad-hoc / on the fly task.

WHERE DO I FIND TASKS ON A FULFILLMENT RECORD?

1. If tasks exist on a fulfillment record (Incident, Change or Work Order) you will locate them on the **Tasks tab** of that record.



2. A **Task Group** can be used to manage group-ings of many tasks.



3. The **tasks** displayed are those that are required to complete the fulfillment record. When a task is assigned to a support group or individual the assignee receives no-tifications to perform the various task activities.

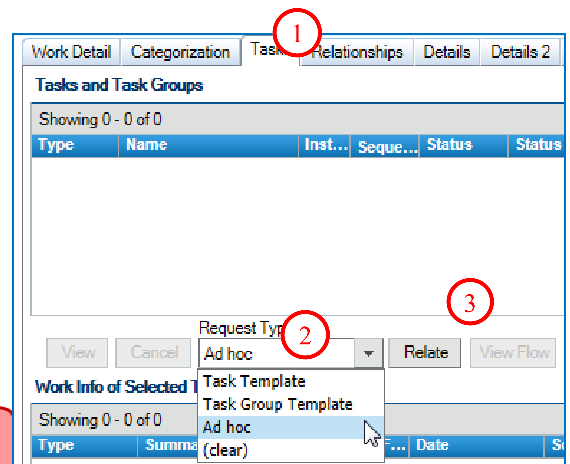
ADDING TASKS OR A TASK GROUP TO A FULFILLMENT RECORD

1. Go to the **Task tab**
2. Under **Request Type** select the drop down arrow and make a selection based on your requirement

- **Task Template**—when adding a single task that has been previously built using a template
- **Task Group Template**—when adding a predefined set of tasks that have been put together to form a Task Group
- **Ad Hoc**—create a task , or multiple tasks, on the fly, and add it to the fulfillment record

3. Click **Relate**

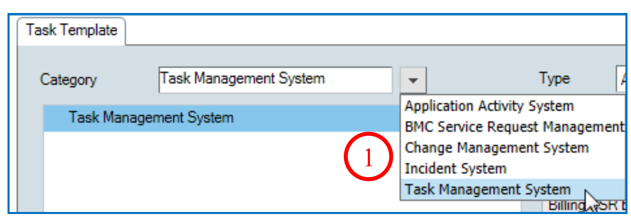
Note: you can click 'view flow' to see a read only view of the task flow in the task group!

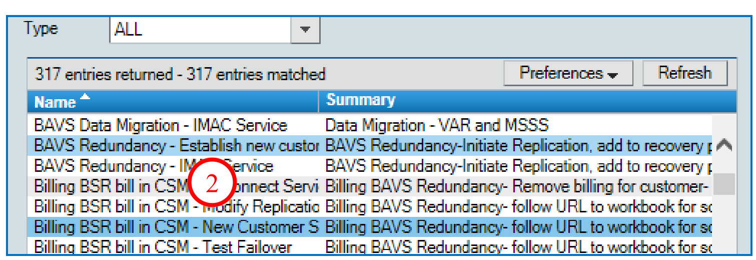


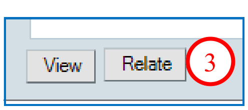
SELECTING A TASK OR TASK GROUP

Task Template Selection **(Single Task)**

1. Select **a Category** (Task Management System typically)
2. Select a **Task record** from the entries in the table
3. Click **Relate—**your task will be added to the task list of the fulfillment record

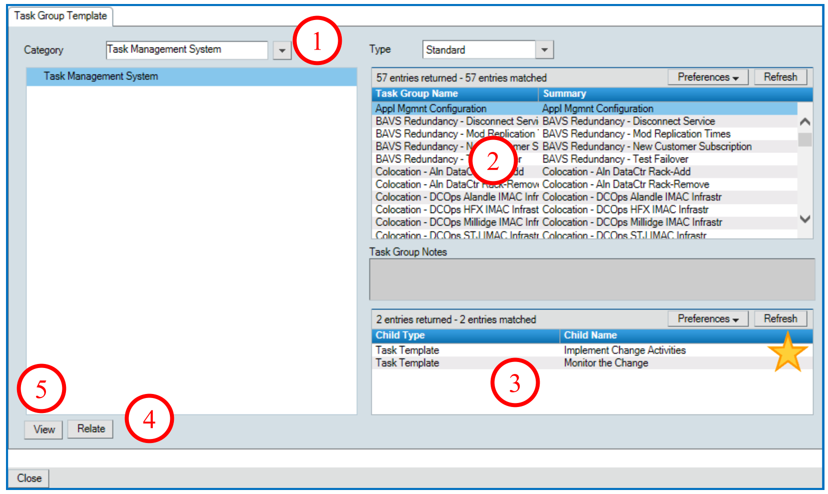






Tip: You can select mul-tiple tasks and relate all at once by holding the CTRL key while selecting the tasks to add!

SELECTING A TASK OR TASK GROUP—*CONT'D*

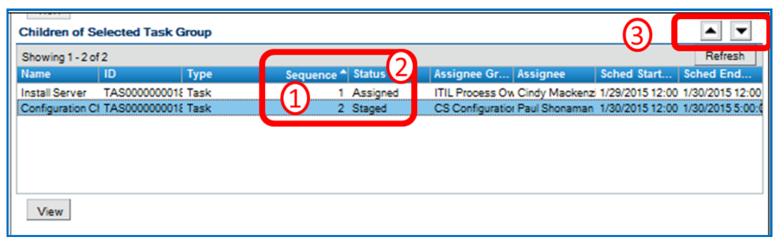


<u>Task Group Template</u> <u>Selection</u>

1. Select **a Category** (Task Management System typically)
2. Select a **Task Group record** from the entries in the table
3. You can see the list of tasks associated to the **Task Group** in the table below
4. Click **Relate**—your Task Group will be added to the task list
5. Click **View** to see the **Task Template** or the **Task Group Template** details

Tip: *In ITSP a status of 'scheduled' meant the task was ready to be worked on, in ITSM the status is 'assigned'!*

Tip: If after adding your Tasks or Task Groups you do not see them in the task tables click the **Refresh** button



<u>Task Sequencing for a Task Group</u>

When a task is 'ready to be worked on' it will be in a status of 'assigned'. Assigned Tasks may be sequenced. Sequencing provides a 'visual' indicator as to the order tasks should be completed.

1. If a person is assigned two tasks as part of one fulfillment record they will notice the tasks are sequenced. ie: 1, 2.
2. If a Task Group had 'relations' built in it will determine the order in which the group of tasks move to a status of 'Assigned'. For example a #1 Task (Assigned) may have to be 'Completed' before a #2 (Staged) Task will be moved to a status of 'Assigned'
3. Once all of your tasks are added to the fulfillment record you can **modify the sequence** in which the tasks will be performed by using the **'up and down' arrows**. The sequence number **will** change the order by which a task moves to an 'Assigned' status. As one sequence # (or set of same numbers) is Closed, the next Task (or set) in sequence will be assigned. *For example:* If you have three tasks all having a number 'one' sequence they will all go to 'assigned' status at the same time. If you have two with a sequence of number 'one' and one task with a sequence of number 'two' the task with the number 'two' sequence **will remain in a status of 'staged' until the two tasks with a number one status are 'closed'.** Your tasks will be moved out of a 'staged' status in the sequence that you give them.

<u>If you need to do work on a ticket after the last Task is completed</u>:
Add a Task for yourself so that when the other tasks are completed, the ticket does not get completed until you complete your own task. Name it *Conduct final review and update effort log,* and sequence it so that it only gets assigned to you after all other tasks are completed

***Note**: Put the sequence on Tasks **BEFORE** you move your ticket out of Assigned/Draft and into an 'In Progress' status!*

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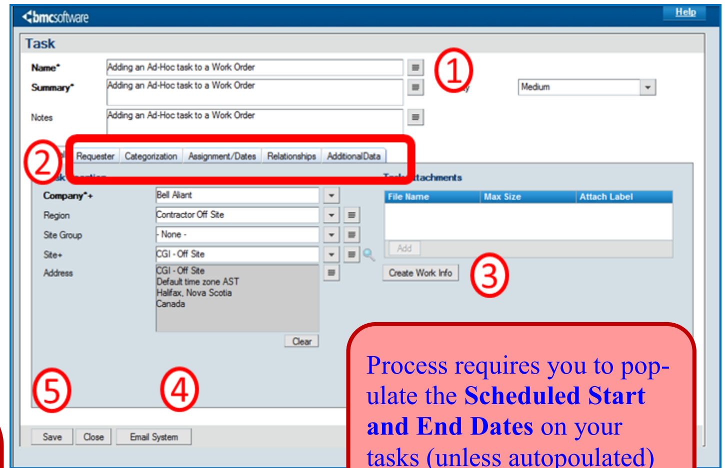
Ad–Hoc Selection

1. Populate the **Name and Summary** fields
2. Most of the required information will be pre-populated on each tab. Fill in any remaining information required **(see Note below on Task Assignment!)**
3. Click **Create Work Info** to add notes to the Task
4. Use the **Email System** button to send an email
5. Click **Save** to create the Ad-Hoc task



Process requires you to populate the **Scheduled Start and End Dates** on your tasks (unless autopoulated)

*Note: You **MUST** update the Task Assignment on the Assignment/Dates Tab! If the assignment is not provided, you will receive the error **"This task (or group) must be activated (from the parent) before it can be changed to the status: Closed "** when trying to move your Task to Closed status.*

Clicking **Clear** will clear the contents of the fields beside the clear button

Tip: *If after adding your Tasks or Task Groups you do not see them in the task tables click the **Refresh** button*

Task Sequencing for Ad-Hoc Tasks

When a task is 'ready to be worked on' it will be in a status of 'assigned'. Assigned Tasks may be sequenced, sequencing provides a 'visual' indicator as to the order tasks should be completed. When you add your tasks it **is recommended that you do so when your ticket is in its original status (assigned/ draft).**

Tip: *In ITSP this was referred to as 'Scheduled' status when it was ready to be worked on*

1. If a person is assigned two tasks as part of one fulfillment record (INC or WO) they may notice the tasks are sequenced. ie: 1, 2, 3.
2. You can see whether a Task is ready to be worked on by looking at the Status column.
3. Once all of your tasks are added to the fulfillment record you can **modify the sequence** in which the tasks will be performed by using the **'up and down' arrows**. The sequence number **will** change the order by which a task moves to an 'Assigned' status. As one sequence # (or set of same numbers) is Closed, the next Task (or set) in sequence will be assigned. *For example:* If you have three tasks all having a number 'one' sequence they will all go to 'assigned' status at the same time. If you have two with a sequence of number 'one' and one task with a sequence of number 'two' the task with the number 'two' sequence **will remain in a status of 'staged' until the two tasks with a number one status are 'closed'.** Your tasks will be moved out of a 'staged' status in the sequence that you give them.

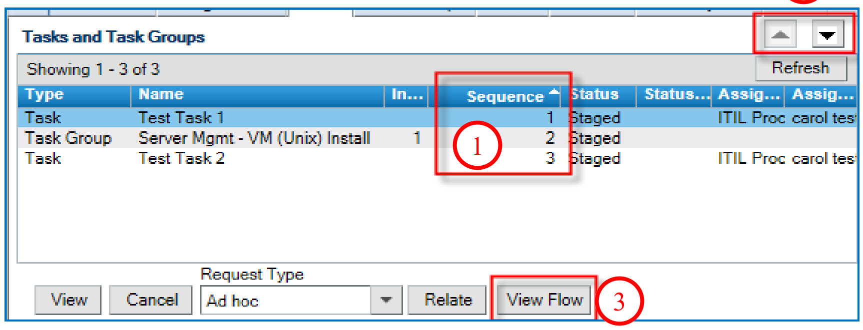
If you need to do work on a ticket after the last Task is completed:
Add a Task for yourself so that when the other tasks are completed, the ticket does not get completed until you complete your own task. Name it *Conduct final review and update effort log,* and sequence it so that it only gets assigned to you after all other tasks are completed

Reminder: *Put the sequence on Tasks **BEFORE** you move your ticket out of Assigned/Draft and into an 'In Progress' status!*

Note: *Once your tasks are moved out of staged and the sequenced assignment begins you cannot add tasks to the sequencing; new tasks will be in a status of 'assigned' immediately!*

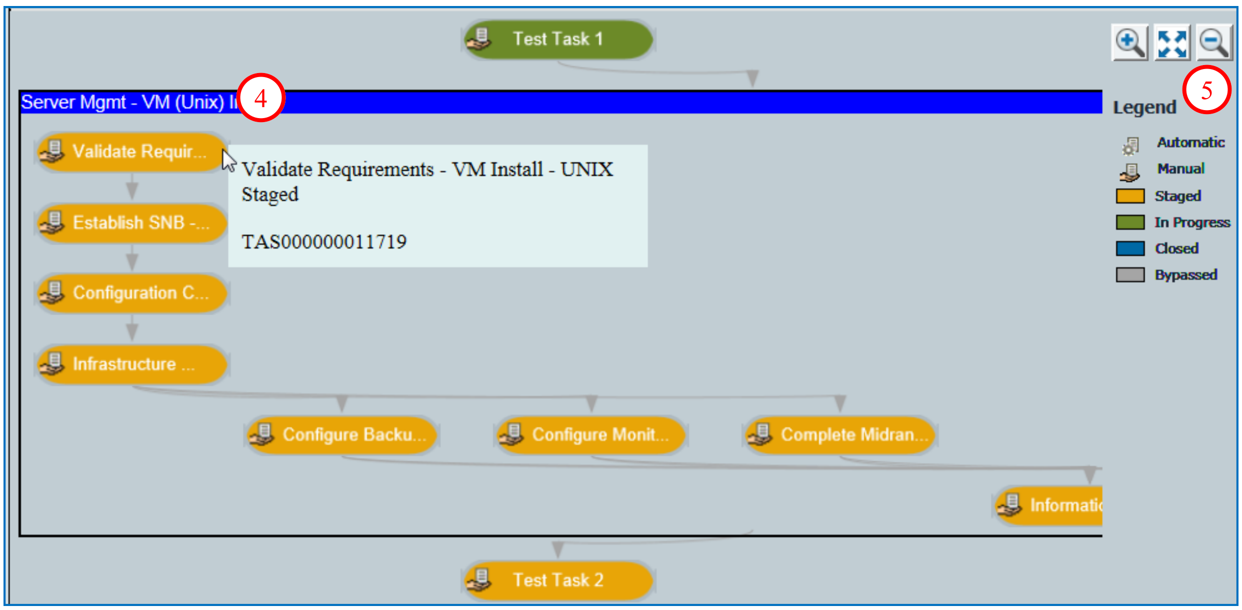
VIEWING TASK SEQUENCING

1. Task Sequencing can be viewed a couple of ways. To see how the Ad Hoc Tasks and the Task Groups associated to the WO are sequenced, with respect to each other, look at the **Sequence** column in the **Tasks and Task Groups section.**
2. You can modify this sequence using the **up/down arrows** on the right
3. You can also view the sequence of tasks in a flow diagram by clicking on **View Flow**

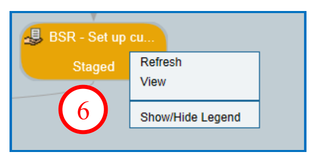


In this view you can clearly see the sequence and the status of each task (Ad hoc and Task Group) by level and color.

4. Hover over a task cell to see the full task name, status and ID, or



5. Use the magnifying glasses, or arrows to modify your view and the level of detail displayed
6. Right clicking on a task cell provides you with the option to view/update the task or to refresh the task to pick up any changes to status that may have been made.



Note: Sequence is not visible WITHIN all Task Groups in the ***Children of Selected Task Group*** *section. If you do not see the sequence for the Task Group here, follow Step #3 above—Highlight the Task Group in the* ***Task and Task Groups*** *section and click View Flow.*