

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 groupings of many tasks.

Children of Selected Task Group

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Name	ID	Type	Status	Status Reason	Assignee
Establish GNS - ITSA Data Regments Wink	TAS0000000111	Task	Staged		CS Midran
Infrastructure Change - VM Install - UNIX	TAS0000000111	Task	Staged		CS Midran
Configuration Change - Add CI - VM Install - TAS0000000111	TAS0000000111	Task	Staged		CS Config
Device IP Verified & Reachable - VM Install - TAS0000000111	TAS0000000111	Task	Staged		Networking
Configuration Change - Update CI - VM Install - TAS0000000111	TAS0000000111	Task	Staged		CS Config
Update HPOV Manager Files & Maps - UNID TAS0000000111	TAS0000000111	Task	Staged		Networking
Update IPControl DNS - UNIX	TAS0000000111	Task	Staged		Networking
Configure Backups - VM Install - UNIX	TAS0000000111	Task	Staged		CS Midran

View Cancel

Work Detail Categorization Tasks Relationships Details Details 2 Date

Tasks and Task Groups

Showing 1 - 1 of 1

Type	Name	Inst...	Seque...	Status	St
Task Group	Server Mgmt VM-INTRMD Install	1	1	Staged	

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 notifications 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!

Work Detail Categorization Tasks Relationships Details Details 2

Tasks and Task Groups

Showing 0 - 0 of 0

Type	Name	Inst...	Seque...	Status	Status
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View Cancel Request Type Ad hoc Relate View Flow

Work Info of Selected Task Template Task Group Template Ad hoc (clear)

Showing 0 - 0 of 0 Type Summary Date

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

Task Template

Category Task Management System Type

Task Management System

Application Activity System BMC Service Request Management Change Management System Incident System Task Management System Billing BSR

Type ALL

317 entries returned - 317 entries matched Preferences Refresh

Name	Summary
BAVS Data Migration - IMAC Service	Data Migration - VAR and MSSS
BAVS Redundancy - Establish new custor	BAVS Redundancy-Initiate Replication, add to recovery
BAVS Redundancy - IMAC Service	BAVS Redundancy-Initiate Replication, add to recovery
Billing BSR bill in CSM - Connect Servi	Billing BAVS Redundancy- Remove billing for customer-
Billing BSR bill in CSM - modify Replicatio	Billing BAVS Redundancy- follow URL to workbook for s
Billing BSR bill in CSM - New Customer S	Billing BAVS Redundancy- follow URL to workbook for s
Billing BSR bill in CSM - Test Failover	Billing BAVS Redundancy- follow URL to workbook for s



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

View Relate



SELECTING A TASK OR TASK GROUP—CONT'D

Task Group Template Selection

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

Task Group Template

Category: Task Management System (1) Type: Standard

Task Management System

57 entries returned - 57 entries matched

Task Group Name	Summary
Appl Mgmt Configuration	Appl Mgmt Configuration
BAVS Redundancy - Disconnect Servi	BAVS Redundancy - Disconnect Service
BAVS Redundancy - Mod Replication	BAVS Redundancy - Mod Replication Times
BAVS Redundancy - New Customer Subscription	BAVS Redundancy - New Customer Subscription
BAVS Redundancy - Test Failover	BAVS Redundancy - Test Failover
Colocation - Aln DataCtr Rack-Add	Colocation - Aln DataCtr Rack-Add
Colocation - Aln DataCtr Rack-Remove	Colocation - Aln DataCtr Rack-Remove
Colocation - DCOps Alande IMAC Infr	Colocation - DCOps Alande IMAC Infr
Colocation - DCOps HFX IMAC Infr	Colocation - DCOps HFX IMAC Infr
Colocation - DCOps Millidge IMAC Infr	Colocation - DCOps Millidge IMAC Infr
Colocation - DCOps STJ IMAC Infr	Colocation - DCOps STJ IMAC Infr

Task Group Notes

2 entries returned - 2 entries matched

Child Type	Child Name
Task Template	Implement Change Activities
Task Template	Monitor the Change

View (5) Relate (4) Refresh

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

Task Sequencing for a Task Group

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.

Children of Selected Task Group

Showing 1 - 2 of 2

Name	ID	Type	Sequence	Status	Assignee Gr...	Assignee	Sched Start...	Sched End...
Install Server	TAS0000000016	Task	1	Assigned	ITIL Process Ow	Cindy Mackenz	1/29/2015 12:00	1/30/2015 12:00
Configuration Cl	TAS0000000016	Task	2	Staged	CS Configurator	Paul Shonaman	1/30/2015 12:00	1/30/2015 5:00

View Refresh (3)

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.

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



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



SELECTING A TASK OR TASK GROUP—CONT'D

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

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.

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

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.

Name	ID	Type	Sequence #	Status	Assignee Gr.	Assignee	Sched Start	Sched End
Install Server	TAS00000000010	Task	1	Assigned	ITS, Process On	Cindy Mackenzie	1/29/2015 12:00	1/30/2015 12:00
Configuration CI	TAS00000000010	Task	2	Staged	CS Configuration	Paul Shoramen	1/30/2015 12:00	1/30/2015 5:00

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**

Tasks and Task Groups

Showing 1 - 3 of 3

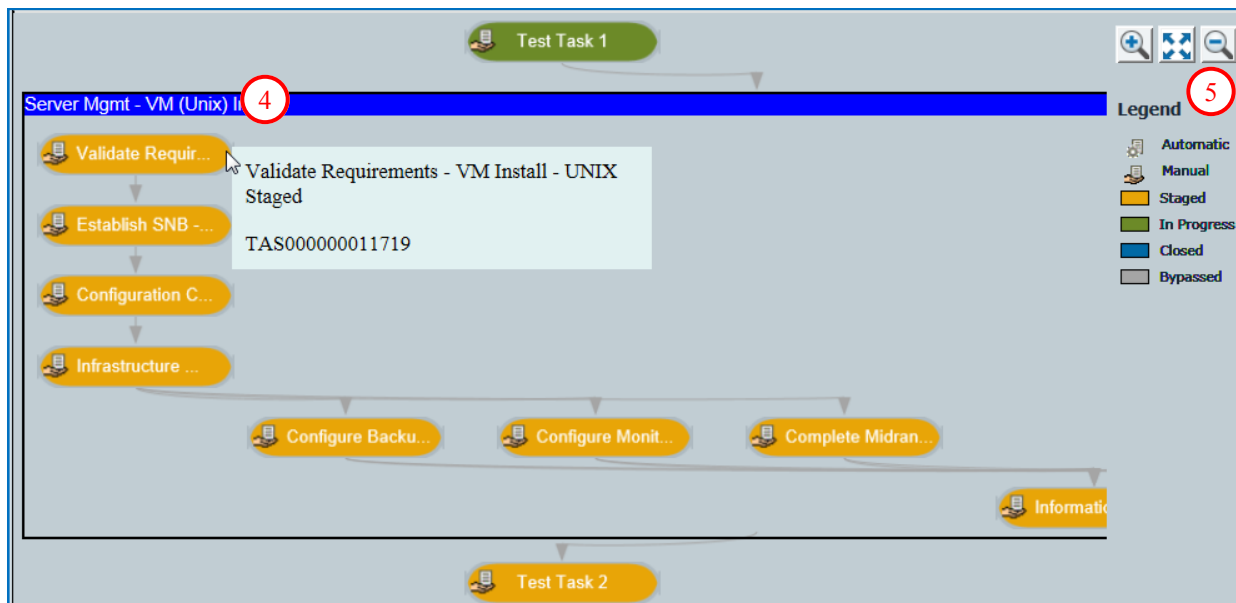
Type	Name	In...	Sequence	Status	Status...	Assig...	Assig...
Task	Test Task 1		1	Staged		ITIL Proc carol tes	
Task Group	Server Mgmt - VM (Unix) Install	1	2	Staged			
Task	Test Task 2		3	Staged		ITIL Proc carol tes	

Request Type: Ad hoc

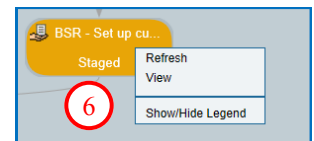
View Cancel Relate View Flow

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.

Children of Selected Task Group

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Name	ID	Type	Sequence	Status	Status...	Assign...
Remove BMC Monitoring - UNIX	TAS00	Task	1	Staged		
Final Backup of device - UNIX	TAS00	Task	2	Staged		
Remove from Backups - UNIX	TAS00	Task	3	Staged		

Children of Selected Task Group

Showing 1 - 9 of 9

Name	ID	Type	Status	Status...	Assign...	Assign...	Sched...
Establish SNB - ITSA Data Reqments Wr	TAS00	Task	Staged			CS Midra	