REMEDY ITSM– TASK MANAGEMENT

TASK UPDATE AND COMPLETION

FINDING YOUR ASSIGNED TASKS

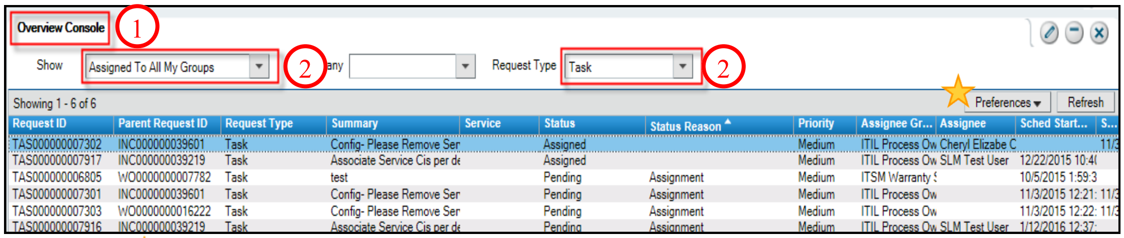
When a task is assigned to you or your group you will receive a Remedy email notification informing you of the assignment of the record.

Note: An individual Task ID is prefixed with TAS a set of tasks, a Task Group, is prefixed with TGR.

There are several ways to find your tasks:

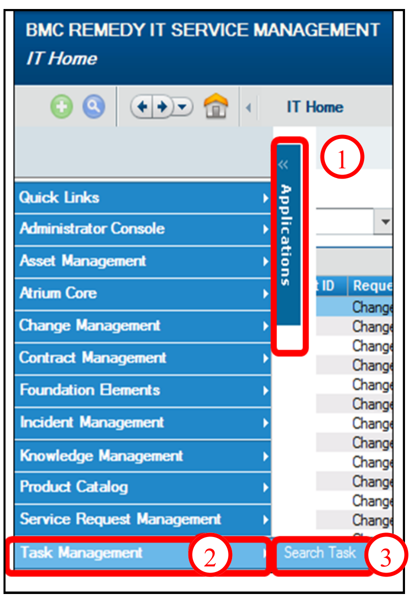
Overview Console: When a Task is assigned to you or your group it will show up in the **1.Overview Console**, pending the search criteria such as **2. Show and Request Type** and be available for you to access.

You will see data pertaining to each task record as per the headings in the table; *ID, Parent ID, Request Type, Summary, status, status reason, Dates etc.*



Tip: *If you do not see* ***Status Reason*** *in your table headings, click on* ***Preferences*** *and then* ***New Column****. Select Status Reason from the list.*

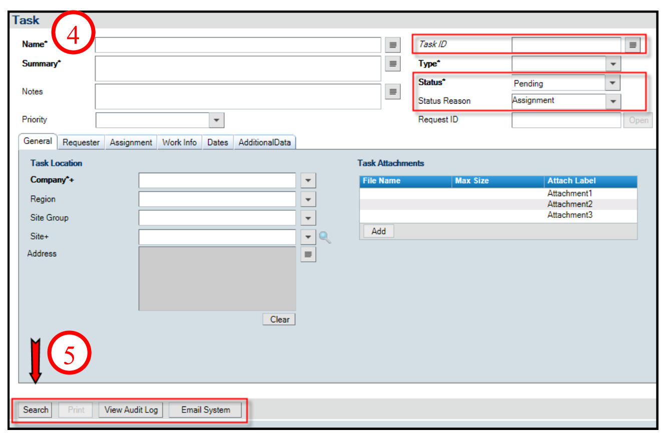
When you locate your assigned Task record **double click** to open it.



Search Task:

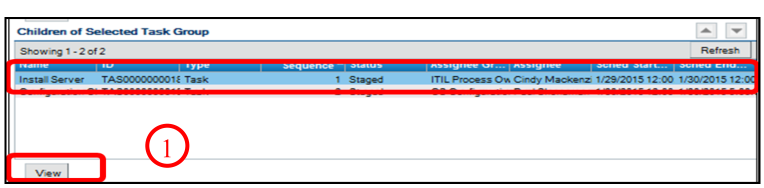
From the **1. *Application* Fly Out Menu** go to **2. *Task Management—> 3. Search Task***

- **4.** On the ***Search Task*** screen define the criteria you wish to use to search for your task such as the *Task ID, Status, Status Reason, Summary* etc.
- **5.**Click **Search**



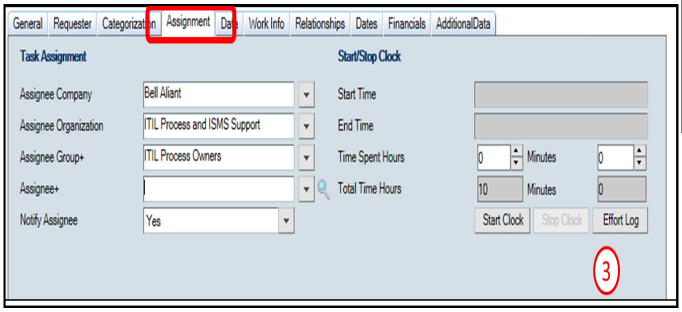
MODIFYING A TASK

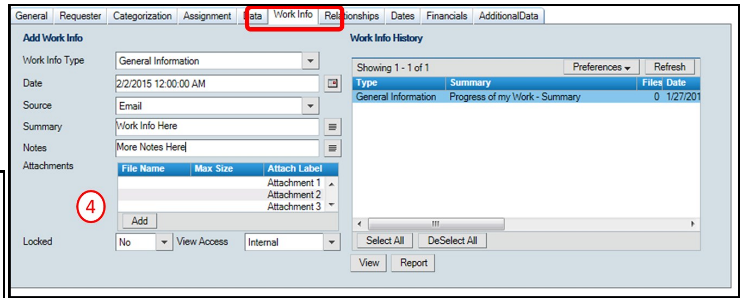
1. Open your assigned task record; from the console, by searching or ***from within the task tab of a fulfillment record*** *- Double click the selected Task record or highlight and click* ***view***
2. On the Task Management form update the fields you wish to update
3. Click on the **Work Info** tab to add notes to the task pertaining to work you would have done.
4. Click **Save**



CLOSING A TASK

1. Open your assigned task record; from the console, by using *Search Task* or from within the task tab of a fulfillment record
2. On the Task record update the following
3. ***Assignment Tab***—Effort / Time you spent on the task

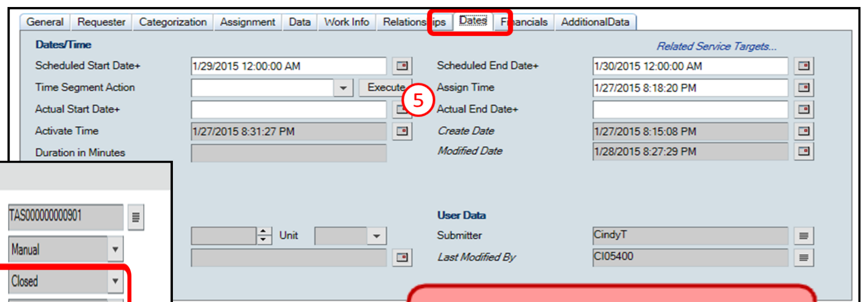


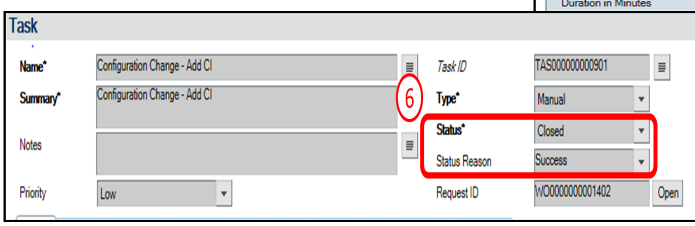


4. ***Work Info Tab***—add notes to the task pertaining to work you have completed

Note: after a task is closed it cannot be reopened

5. ***Dates Tab***—populate both the ***Actual Start Date*** and the ***Actual End Date*** if not auto populated
6. Select a **Status Reason** to describe how the task was closed, and then click **Save**



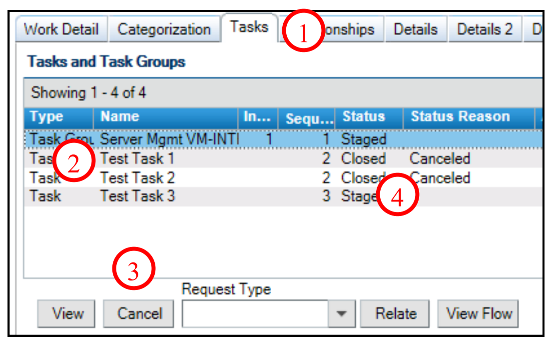


Note: after a task is closed it cannot be reopened

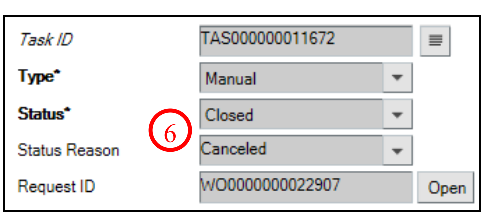
CANCELING A TASK

From within the Fulfillment Record (WO, CRQ or INC)

1. Click on the **Tasks Tab**
2. **Select** the Task record in the table that you wish to cancel,
3. Click **Cancel**
4. Answer **"Yes"** to the question "Are you sure you want to cancel this task or task group?" The Task is Closed, with a Status Reason of "Cancelled"



From Search Task



5. Populate the **TAS ID** or other known search criteria, click **Search**
6. Modify the **Status** of the Task to "Closed" with a **Status Reason** of "Cancelled"
7. Click **Save** in the bottom, left corner

Note: Clicking the Refresh button will update the table to the latest results.

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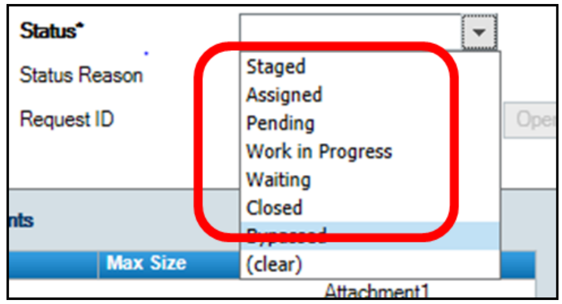
STATUS TRANSTIONS OF A TASK—TASK LIFECYCLE

A Task has several status within it's lifecycle

- **Staged**—status of all Tasks where the fulfillment record is still in planning,
- **Assigned**—the Task is ready to be worked on *(aka..scheduled)*
- **Pending** - to be used when the Task is 'on hold'
- **Work in Progress** –to be selected when a Task is being worked on
- **Closed** - when the work on the Task is completed

Tip: *Using a status of 'Pending' with a Status Reason other than 'assigned' will stop the OLA clock.*

Note: When all Tasks on a fulfillment record are Completed the fulfillment record will move to a status of Completed



REASSIGNING A TASK

- On the **Assignment tab** of your assigned Task click the drop down arrows to modify the assigned information; organization, group and assignee if applicable.
- Click **Save**

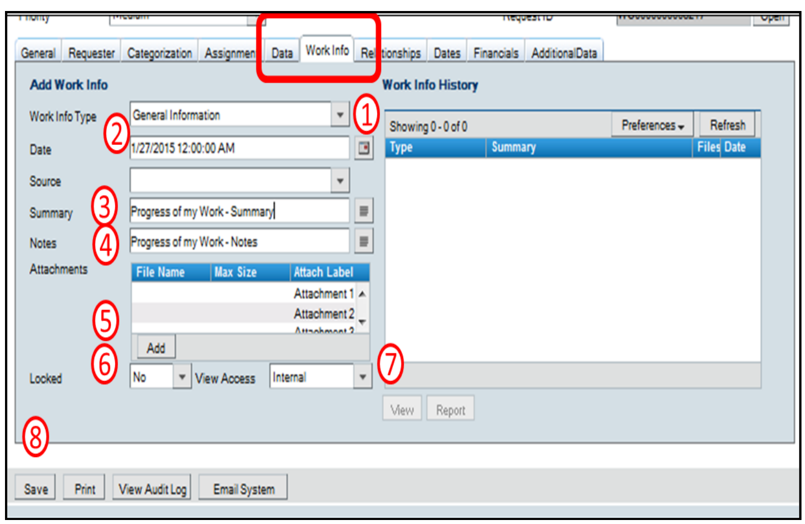
The new Assignment Group will receive an email notification of the assignment of the Task.

OTHER ACTIONS WHEN UPDATING A TASK

Add Work Info (Work Log)

At any point in the Task lifecycle you can add a work info for tracking updates and as a means to provide information to subsequent task implementers.

1. On the **Work Details Tab** select your Work Info Type from the drop down menu selection
2. Populate the **Date** field
3. Provide a **Summary** of the Notes you are adding
4. Add the **Notes** you want to add to the Work Info
5. Add an **Attachment** by clicking Add and browsing to an attachment to be added
6. **Lock** the Work Info if you do not wish updates to be made to the notes
7. **View Access** is set to Internal for Work Order Managers to view the notes of Public for all Remedy users to have the ability to view the notes
8. Click **Save** to add the Work Info (Work Log) to your Task



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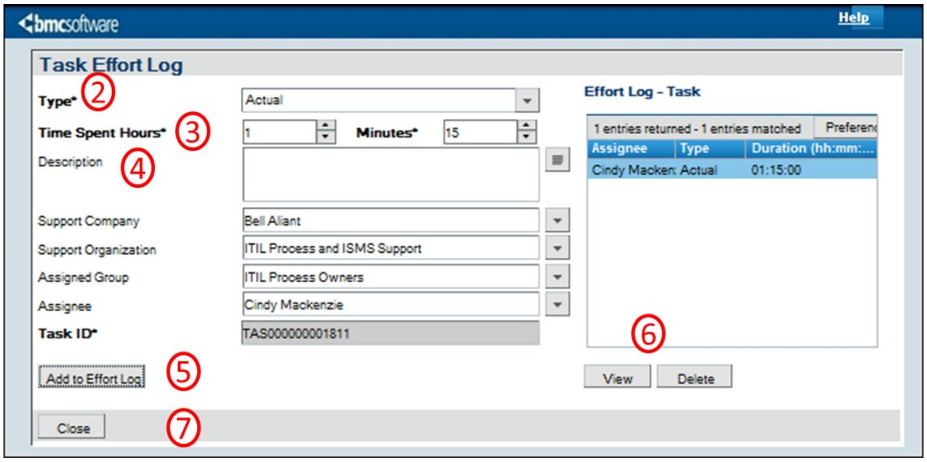
ADDING EFFORT ON A TASK

As you work on a Task you may want to track the effort spent on the Task. This is important throughout the lifecycle of the task.



1. On the **Assignment Tab** click on the **'Effort Log'** button to open the Effort Log tracking table
2. Select the **Type of Effort**
3. Add **Time Spent** in Hours or Minutes (Use the arrows to increase/ decrease the time)
4. Include a **Description** of the Effort
5. Click the **Add to Effort Log** to see your Effort appear in the Effort Log table
6. **View/ Delete—**use these buttons to view or delete effort you have added to the log
7. Click **Close** to close the Effort Log dialogue box

ADDITIONAL BUTTONS

On each Task you will see, next to the Save button, a Print, View Audit Log and a Email System buttons. They each have a function within the task.

1. **Print –**brings up an HTML format of the Task for you to Print; you can print or export the report from here

2. **View Audit Log**—provides an Audit Log of activity that has taken place throughout the lifecycle of the Task. You can also click on the 'Notification Audits' sub tab to view notifications that would have been sent pertaining to the task.

3. **Email System**—provides the capability to send an 'email' asking questions or providing information pertaining to the Task. You can search people or type in an internet email address to send your email to.