Task Management

Managing Tasks in *Xpert.NET*

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1 Introduction

Xpert.NET is a very dynamic help desk solution that can be configured in various directions. Daily routine and experience have shown that users get acquainted with the most important modules and configurations quickly. Nevertheless, some questions regarding the functionalities of the *Xpert.NET* modules often remain. Thus, the individual modules cannot be used to their full potential.

1.1 Addressees of the Document

This document mainly addresses administrators of *Xpert.NET*.

Nevertheless, end users may find useful tips on using *Xpert.NET* here as well. However, shorter documents for users and members of support are already available.

1.2 Remarks on the Content of this Document

This document describes all available functions for the administration. Nevertheless, the range of functions may vary due to configuration, licensing, and version. If you miss certain functions described in this documentation in your *Xpert.NET* installation, please contact our support directly.

1.3 Use of the Task Management

Tasks and thus the Task Management are used for emulating smaller tasks, which are not worth the configuration of a ticket schema with all its parameters, in *Xpert.NET*. Tasks can be either created individually in the Task Management or used in various combinations with tickets and from workflows. Therefore, they offer miscellaneous fields of application.

2 Basic Configuration

Various configuration arrangements are necessary for a functional Task Management:

- Various task statuses symbolizing the current processing status of a task,
- various life cycles containing information on reachable statuses and status transitions of tasks,
- task life cycles, in which individual life cycles, OLA information, and dynamic fields are combined.

The configuration of the Task Management module can be accessed via SETTINGS -> TASK MANAGEMENT.

2.1 Task Statuses

A task status is the status a task can be in. The succession of the various statuses (which status follows which) is not achieved until they are used in life cycles. Depending on the status, different actions for tasks can be made available to different users and groups.

The configuration of the task statuses can be found under SETTINGS -> TASK MANAGEMENT -> TASK STATUSES. An overview of all already created statuses for task is displayed here.

Via the button *New task status*, additional statuses can be added; via the *Actions* button on the left, already created statuses can be deleted.

2.1.1 Creating and Editing a Status

In order to create a new status, the *New task status* button can be used. Alternatively, an existing status can be edited via a double click on the desired status. In the following dialog, all the configuration settings for the status can be specified.

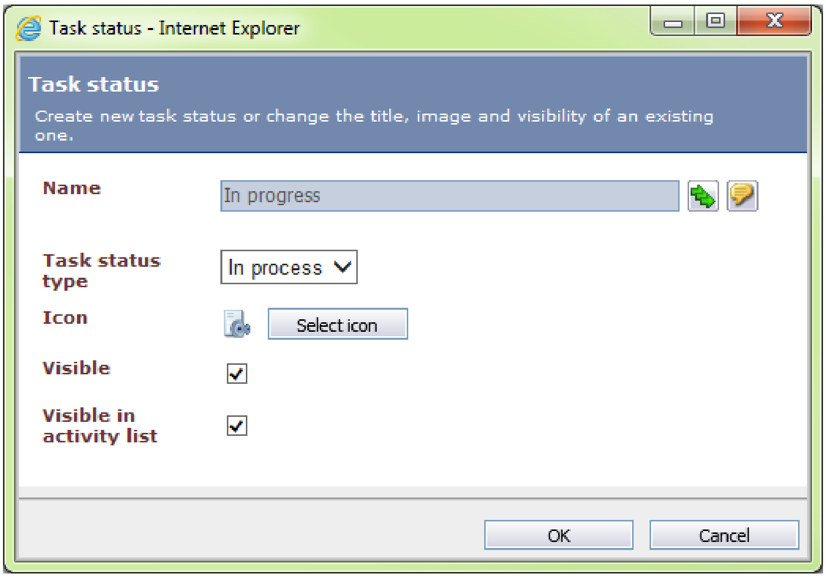

Figure 2.1: Configuration dialog of a task status

The following options can be edited here:

Name: The name of a status, as it will be displayed at various locations later on, e.g. in a task. The name can be entered localized as soon as multiple languages have been licensed.

Task status type: The status type is a rough categorization of the freely definable statuses. The list of status types cannot be edited.

Icon: The icon set here symbolizes the respective status and is displayed for a better visualization of the status in the detail view, for example. There is a predefined icon set available. However, any other icons can be used here as well. They have to be available as a .gif file with a size of 20 x 20 px.

Visible: When this option is activated, the task will be visible. Thus, this option can be deactivated for a status a finished task is supposed to have, in order to prevent the task from being visible in the task overview, for example.

Visible in activity list: When this option is activated, a task with this status will be visible in the activity list.

2.2 Task Life Cycle

The life cycle of a status is defined by the statuses to be passed through and reached as well as the dependencies between them. Thus, a structure of status dependencies has to be preplanned for every life cycle. In doing so, a start and end status have to be defined, which have to be reachable. Furthermore, every status apart from the end status has to have further reachable statuses.

The configuration of the task life cycles can be found under SETTINGS -> TASK MANAGEMENT -> TASK LIFE CYCLES. An overview of all previously created life cycles for tasks is displayed here.

The various life cycles can be created and managed here. Via the button *New life cycle* top right, new life cycles can be created. The *Actions* menu on the left allows for deleting them. Via a double click, already existing life cycles can be opened and edited.

2.2.1 Creating and Editing a Life Cycle

For creating a new life cycle, the button *New life cycle* can be used. As an alternative, a double click on an existing life cycle will open it for editing. The entire configuration of the life cycle can be performed in the dialog opening subsequently.

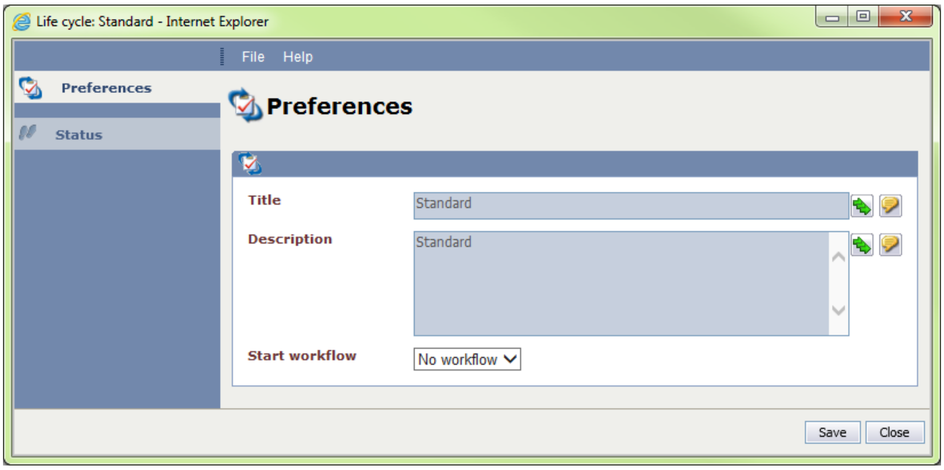

Figure 2.2: Configuration dialog of a task life cycle

The following options can be configured on the *Preferences* tab:

Title: The name of the life cycle. It can be entered localized as soon as multiple languages have been licensed.

Description: A description of the life cycle can be entered here. It can be localized as well.

Start workflow: The task workflow specified here will be run through by every task based on a schema using this life cycle. Only workflows with the type *Task* can be used here. Further information can be found in the *Workflow Management* documentation.

On the *Status* tab, the various statuses for the life cycle can now be configured.

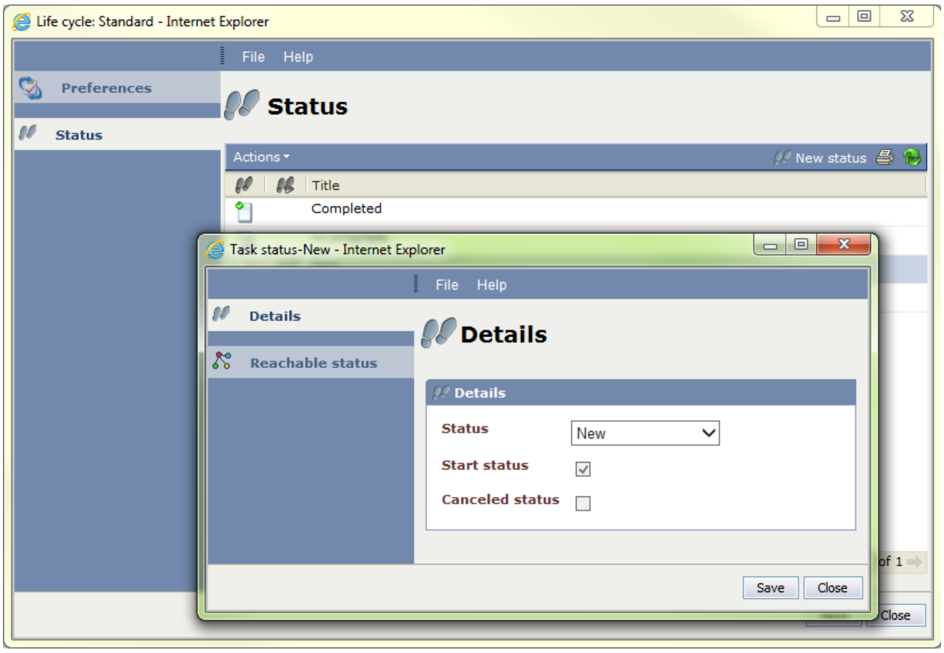

Figure 2.3:

Click on the *New status* button. In the now opening dialog, statuses to be available for this life cycle's tasks can be selected. The first status added will be set as the start status automatically.

Start status: The start status is the first status a task can obtain. The *Start status* tag can only be assigned once.

Cancelled status: This option is used for the ticket action *Cancel successor tickets and tasks*. When this action is performed in a ticket, all the tickets and tasks created from this ticket will be set to the status specified as the cancelled status.

After a click on the *Save* button, the second tab *Reachable statuses* will become available. It can, however, be ignored until all of the desired statuses have been configured in the life cycle.

On the respective *Reachable statuses* tabs, the status(es) that can be reached from the various statuses can now be defined.

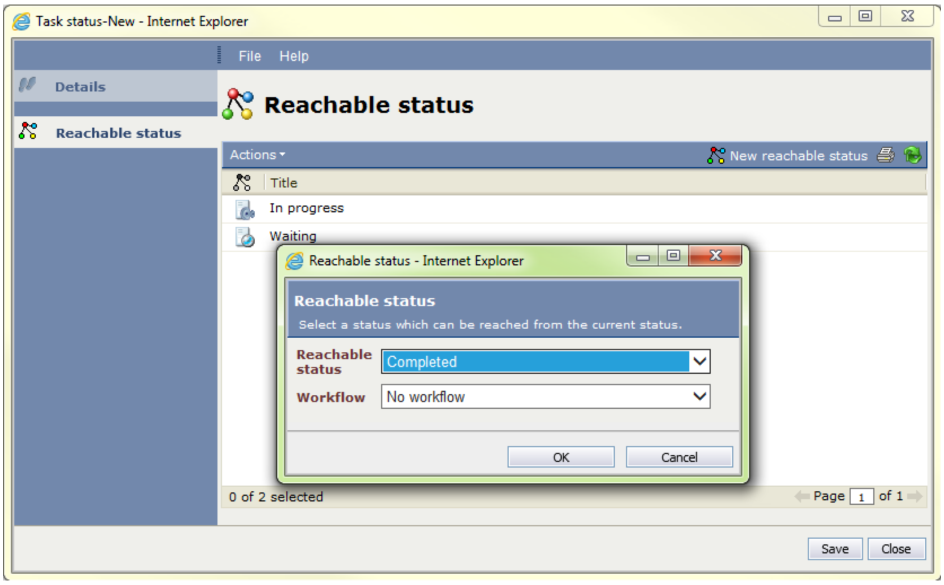

Figure 2.4: A new reachable status

In order to define a new reachable status, click on the button *New reachable status*. In the next dialog, the following options are available:

Reachable status: Select the desired reachable status here. Only the statuses added to the life cycle previously are available.

Workflow: A workflow with the type *Task* can be selected here. This workflow will be initiated simultaneously to the start workflow as as soon as a task reaches the status. The task or task workflow item will then run through both workflows at the same time.

2.3 Task Schema

In a task schema - similarly to a ticket schema - all of the settings, fields, actions, and - in lieu of Service Level Agreements - Operational Level Agreements to use this schema later on can be defined and saved.

The configuration of the task schemas can be found under SETTINGS -> TASK MANAGEMENT -> TASK SCHEMAS.

Task schemas can be composed here.

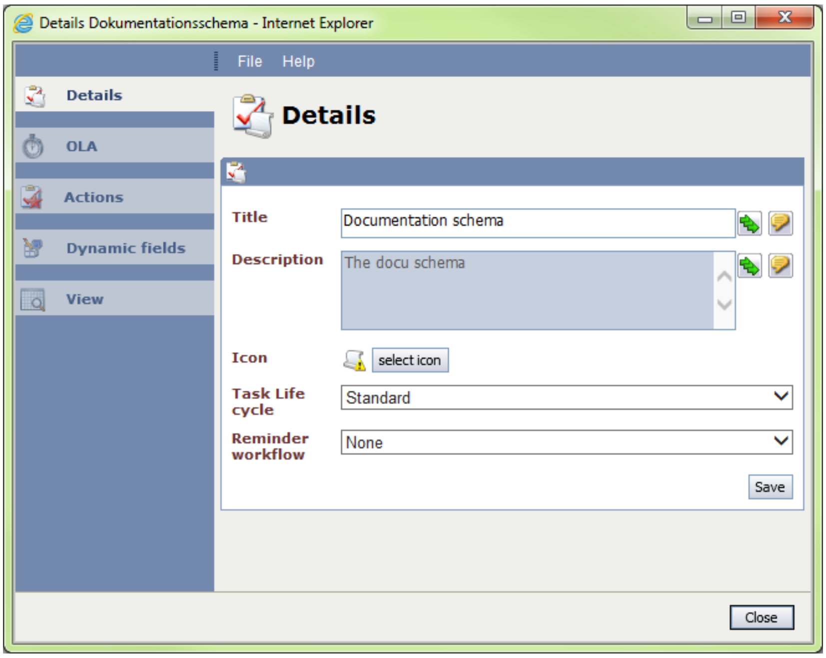

Figure 2.5: Configuration dialog of a task schema

After a double click on an existing schema, it will open. Via the *New task schema* button, a new schema can be created. A dialog will open, in which all configuration options for the new task schema can be specified. Until the first saving, only the *Details* tab will be available here.

2.3.1 Details

On the *Details* tab - the only tab available before saving a new schema - the following options are available:

Title: The name of the task schema. Schemas can have localized names as well, as soon as multiple languages have been activated .

Description: A short explanatory description can be entered here. The description can be entered localized as well.

Icon: An icon symbolizing the schema (e.g. in a linked ticket). There is a predefined icon set available. However, other icons can be used as well. They have to be available as a .gif file with the size 20 x 20 px.

Task life cycle: A previously created, matching life cycle is to be selected here.

Reminder workflow: The reminder workflow (e.g. a workflow sending an e-mail to a predefined user) is passed through by a task as soon as the date and time defined as a reminder in the task are reached.

After having entered all of the information, a click on *Save* creates the task schema. The remaining tabs on the left will now be available for this schema.

2.3.2 OLA

Here, an Operations Level Agreement (OLA) can be defined. Basically, this is a greatly simplified Service Level Agreement (SLA).

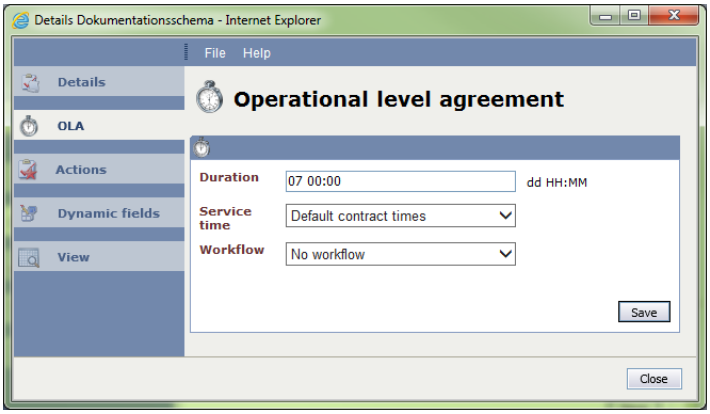

Figure 2.6: Configuration of an Operational Level Agreement

The following options can be configured here:

Duration: The duration specifies the time a task is allowed to take until the corresponding workflow is triggered. The duration has to be entered in the format *days hours:minutes* (dd hh:mm, e.g. 05 12:00 for five days and twelve hours).

Service time: The service times to be used are defined here, during which the previously configured duration starts to run down, e.g. 7x24. The service times will be adopted from the SLM and can be configured there as well. For further information, please check the *Service Level Management* documentation.

Workflow: The workflow selected here will be triggered as soon as the previously defined duration has been exceeded by a task.

2.3.3 Actions

Similar to the ticket actions, actions can be configured for task schemas as well. Click on the *New action* button in order to add an action to the task schema. To delete an action, the *Actions* menu can be used.

Overview of the Actions

Accept task: This action changes a task's owner. If the task has been assigned to a group, every user belonging to this group can accept the task.

Add comment: With this option, comments can be added to the task. Later is the task, this action will be available either via the *Actions* tab or via the *Comments* tab.

Assign task: Via this action, tasks can be assigned to previously configured groups by certain users or groups.

Book expense: This action allows for booking expenses to a task on the *Expenses* tab.

Change title and description: Via this action, the title field and the description can be changed later on.

Create successor task: Via this action, successor tasks can be created from the current task on the *Actions* tab.

Create successor ticket: With this action, successor tickets can be created from the respective tasks via the *Actions* tab.

Edit custom fields: Via this action, dynamic fields can be edited afterwards. As the dynamic fields cannot be filled in during task creation, it is advisable to configure this action on the start status of a task schema. The fields can then be edited under FIELDS -> DYNAMIC FIELDS.

Edit expense default values: If this action has been activated for a task schema, the default values for new expenses created from the task can be edited on the *Expenses* tab.

Edit OLA: In an already created task, the OLA can be changed afterwards via this action, e.g. if a too short default duration has been selected for a task. The OLA can be modified on the *Fields* tab by changing the start, reminder, and end date.

Edit scheduling: This action activates an additional tab under *Details*. A task for recurring assignments, which will always run through a certain workflow at a certain time, can be configured here.

Link CI: Via this action, CIs can be linked to a task of this schema.

Link task: Via this action, tasks or CIs can be linked to the current task on the *Relations* tab.

Link ticket: Via this action, tickets can be linked to the current task.

Remove linked ticket: This action removes an already existing link to a ticket.

Take over task: This action changes the owner of a task. Every configured user can accept the task.

Upload file: Via this option, file attachments can be managed by the configured users (e.g. creator, owner, etc.), similar to the file attachments of tickets and CIs.

2.3.4 Dynamic Fields

Here, you can add dynamic fields to a schema. These fields can be treated just like the dynamic fields in a CI or ticket schema. They can be configured for a certain schema, in order to meet its requirements. In order to add a dynamic field, click on the *Add field* button. If a field that is not needed any more is to be deleted, use the *Actions* menu.

A click on the *Add field* button opens a new dialog, in which a new dynamic field can be configured. After a double click on an already existing configured field, this dialog will open as well and will allow for further modifications.

Available Options

Name: Enter a name for the field here. If multiple languages are activated on your system, you can enter a friendly name for each one of them.

Type: Select the desired type of dynamic field here. Only the type *Text* is available at present.

Default value: Enter a default value here. This value will be entered into the field as default during task creation, if the user does not enter anything different.

Required: If this option is activated, this field has to be filled in when the dynamic fields are edited.

2.3.5 View

The display of the fields can be customized here. This view will not only be valid for the task itself but also for the task preview and the tickets containing this task later on. However, it can be configured in a way to make certain fields only available in certain views.

A click on *Add field* adds fields for the custom view. In order to delete existing fields from the view, the respective field can be selected with a simple click and then deleted via the *Delete* button on the right.

Depending on the selected data type (*Header data*, *Dynamic fields*, *Task view controls*), various options are available here:

Type: Select here, which data type the field is supposed to have. Available are: Header data, Dynamic fields, and Task view controls.

Fields: Select the desired field of the chosen data type here. For example, if *Dynamic fields* has been selected as a *Type*, all of the dynamic fields created will be available under *Fields*.

Label: If the field is supposed to have an additional label, it can be entered here. It can be entered localized for every activated language as a friendly name as well.

Always visible: If this option is activated, the field will always be displayed, even if it is empty.

Convert line breaks: Converts unnecessary line breaks.

Use whole row: Via this function, not two, but only one field will be used per row.

Task detail dialog: If this option is activated, the field will be displayed in the task detail dialog.

Task preview: If this option is activated, the respective field can be seen in the task preview.

Ticket detail dialog: Via this option, the field will be displayed in the ticket detail dialog as well, if a task has been created via a ticket.

3 Task List and Task Creation

After the configuration of the task schemas has been finished, there are various options for creating and managing tasks. Tasks can be created from

- tickets,
- automatically from a workflow (via the workflow plug-ins *Create task* and *Create task activity*; further information on this topic can be found in the *Workflow Management* documentation),
- or as individual tasks in the Task Management.

3.1 Task List Structure

The Task Management can be accessed via the button *Tasks* in the side bar on the left.

This opens an overview of the tasks. There are two views available here: The first one is the folder view, in which tasks will be sorted into folders and can be created in their respective folder as well. The second view is the ticket view. Here, existing tickets will be arranged according to the ticket and process schemas they have been created from.

Please note

Tickets containing tasks will only be displayed, if at least one of the contained tasks has not been closed yet. Tickets containing only closed tasks (task status type: Closed) will not be displayed here.

New tasks, however, cannot be created in the ticket view. This is only possible via tickets. On the right, next to the folder/ticket view, an overview of the existing tasks either from the folders or the ticket schemas can be found.

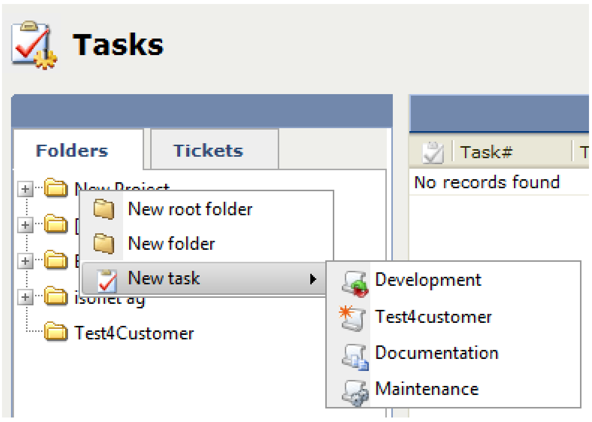

Figure 3.1: The task stage

If there are tasks listed, they can be opened via a double click. Tasks not needed any more can be highlighted and then deleted via the *Actions* menu, if the current user has the permissions to do this (see *User Management* documentation).

3.1.1 Task Creation in the Folder View

In the folder view, tasks can be created independently from tickets. In order to provide more clarity, the tasks can be sorted into a hierarchical folder structure.

A right click on the existing folder structure opens the context menu. Select either *New main folder* or *New folder* in order to expand the folder structure here.

A main folder will always be created on the topmost level. Normal folders can then be nested into these main folders arbitrarily.

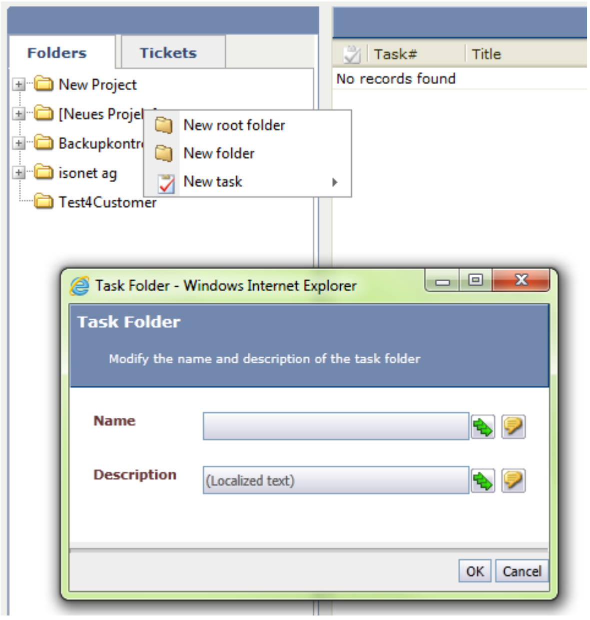

Figure 3.2: Creating a new task folder

A name and a description can be specified for every folder, as a friendly name as well as localized for every activated language.

Warning

If there is no folder in the Task Management yet, an empty tree node will be displayed in the hierarchy. In order to create the first main folder, right click on this node.

In order to create tasks in the folders, open the context menu again and select *New Task*. Further options will be faded in and allow for selecting a task schema for creating the new task.

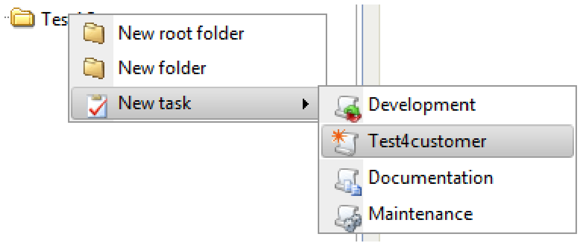

Figure 3.3: Creating a new task via the context menu

Select the desired task schema and confirm it with a click. Subsequently, a new dialog will open. As a first step, general information on the new task can be entered, irrespective of the task schema selected:

Title: A significant name for the new task can be entered here.

Description: Enter a description for the task here.

Executor: A user or user group can be selected via user browser here. The task will then be displayed in the activity list of this user or every member of this group. (A requirement for this is the start status being set to *Visible* and to *Visible in activity list*.)

Start: The start date and time of the task. On this date, the task schema's OLA will begin automatically.

Reminder: Select a time, at which the reminder workflow selected in the task schema previously is to be initiated.

End: The end date planned for the task. If an OLA has been specified for the task schema, the end date will be automatically set to the defined time after the start date. If, however, another end date is to be specified for this task, it can be entered here.

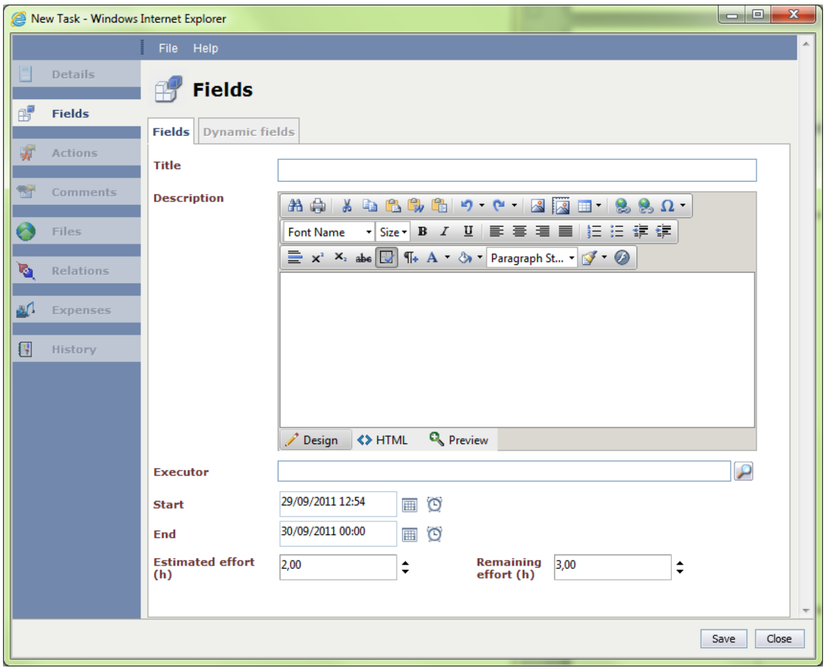

Figure 3.4: A new task

3.2 Creating Tasks from Tickets

In order to create tasks from tickets, the ticket action *Create task* is needed for the respective ticket schema. Further information on the configuration of this action can be found in the *Ticket Management* documentation.

3.3 Creating Tasks from Workflows

Tasks can be created automatically from workflows as well (plug-ins *Create task* and *Create task activity*). Detailed information on this topic can be found in the *Workflow Management* documentation.

4 Structure of a Task

Tasks have a structure similar to the tickets.

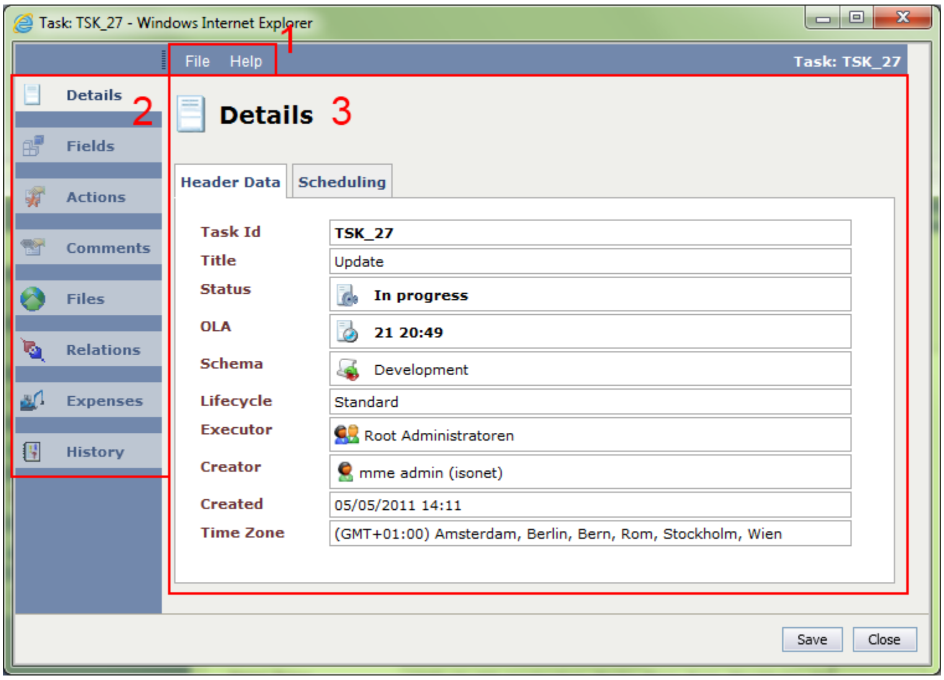

Figure 4.1: A task on the *Details* tab

The top menu (1) offers the options to print an overview of the task and to close the task view under *File*. The system help and information on the system version can be found under *Help*.

In the function bar (2), there are various tabs available for displaying as well as adding new information on the task.

The main window (3) displays all the information on the currently active tab.

4.1 Details

The *Details* tab displays an overview of the task on the *Header* data tab, e.g. the task ID, the title, or the task schema used. If the task action *Edit scheduling* has been configured for a task schema, its configuration can be finished on the *Scheduling* tab.

Scheduling

A schedule can be used in order to configure a task for recurring assignments, so that it will always run through a certain workflow at certain times.

4.2 Fields

Two tabs are displayed under *Fields*: *Fields* and *Dynamic fields*. The *Fields* tab displays the fields that can be filled in during task creation and that are available for every created task, irrespective of the task schema. Via the two task actions *Change title and description* and *Edit OLA*, the fields can be modified afterwards as well.

The second tab *Dynamic fields* contains the fields that can be configured independently for each task schema. If the action *Edit custom fields* has been activated, the fields can be edited as well.

4.3 Actions

Currently pending actions, e.g. *Assign task* or *Link ticket*, as well as workflow activities are displayed here and can be performed by the user.

4.4 Comments

Comments on the task are displayed here. If the action *Add comment* has been activated, they can be added here as well.

4.5 Files

The task's file attachments are displayed here and can be added and deleted, if the respective action - *Upload file* - has been activated.

4.6 Relations

Links to CIs, tickets, and tasks are displayed here. If the respective actions have been configured, links can be added and removed as well.

4.7 Expenses

The expenses for the respective task are displayed here. Various expenses, e.g. expenses generated by solving the task, can be recorded for a task.

4.8 History

Actions that have been either performed by the user or automatically by the system are listed here chronologically in order to facilitate clarity.

5 Statistics and Change Management

5.1 Statistics

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Valid until	Cancellation
Document name	Task Management 2015-1_EN

5.2 Change Control

Version	**Date**	**Executed by**	**Comments**
1.0	01.07.2008	Marco Mehl	Created
1.1	20.08.2009	Maik Wisatzke	New design/new figures
3.0	07.09.2010	Maik Wisatzke	Complete revision
3.1	09.09.2011	Marco Mehl/Maik Wisatzke	Added note on empty Task Management and closed tasks in tickets
3.8-1	10.09.2013	Maik Wisatzke	Completed linguistic revision, new features
3.10-1	29.07.2014	Anna Hajduk	Updated and revised
2015-1	12.06.2015	Alexander Schmidt	Updated for 2015

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