

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 nearly every direction. Daily routine and experience have shown that, while most administrators familiarize themselves with the most important modules and configurations after some time, many questions remain unanswered and much potential unused, due to a lack of knowledge.

This document is supposed to help you with the orientation in the Task Management module of *XPert.NET*. For this purpose, it describes the respective configuration options step by step.

1.1 Addressees of the Document

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

However, end users can find useful tips on using the tool as well. But it is certainly not a good idea to provide end users with this document, as it includes information that is of no value to them. If you, as an administrator, would like to compile a slim document for your end users in order to help them to use this tool, it is certainly possible to adopt some of the passages. There are, however, smaller, slimmer documents for users and members of support already available.

1.2 Remarks on the Content of this Document

In this document, all the functions of the Ticket Management module will be named and described. The scope of the functional range on every system can, however, fluctuate, because of different factors. Generally, the most important factors are the modules licensed. Additionally, we - as the *XPert.NET* support - can activate or change certain functions according to customer requests in order to achieve certain results. Moreover, *XPert.NET* is in constant development and therefore new functions are added constantly. So it is also important, which version you have installed on your system.

Thus, you may find functions in this document, which you will not find in your system. If this happens, and you would like to obtain further information on activating these functions, please contact development@isonet.ch 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, on your *XPert.NET*. Tasks can be either created individually in the Task Management or used in various combinations with tickets. Therefore, they offer miscellaneous fields of application.

2 Configuration of the Task Management

You can access the Task Management module via *SETTINGS* → *TASK MANAGEMENT*. Here, you have the option to create task statuses, life cycles, and schemas.

2.1 Task Statuses

After using this link, you can see an overview of all the task statuses already created.

Via the button *New task status*, you can add additional statuses; via the *Actions* button on the left, you can delete already created statuses.

2.1.1 Creating and Editing a Status

If you want to create a new status, simply click on the *New task status* button. Alternatively, you can edit an existing status by double clicking on the designated status. In the window now opening, you can enter all the settings for the status.

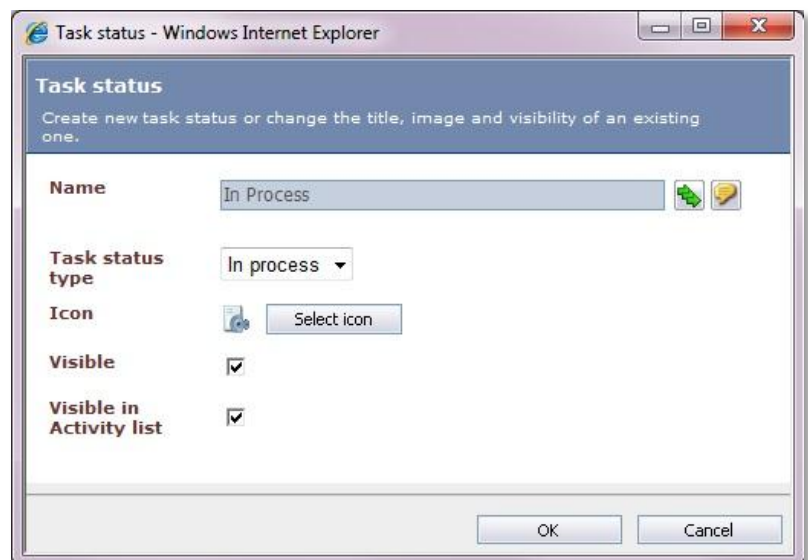


Figure 2-1

The following options can be edited here:

Name: Enter a significant name for the task status here. In case of multiple system languages, you can enter an individual name for every language, which will be displayed as a friendly name for users using the respective language.

Task status type: Via the task status type, you can roughly categorize your task status.

Icon: Select a matching icon for the status here. The icon will make the distinction easier later on. You can either upload your own icon or select one from a predefined set of icons. The icon is displayed at the size of 20x20 pixels. If your icon is bigger or smaller than that, it will be scaled accordingly.

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

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

Here, you can create and manage various life cycles. Via the *New life cycle* button top right, you can create new life cycles. The *Actions* menu on the left side can be used for deleting them. Via a double click, you can open already existing life cycles.

2.2.1 Creating and Editing a Life Cycle

If you want to edit a life cycle, double click on the designated life cycle or create a new one. In the subsequently opening dialogue now, the life cycle can be configured entirely.

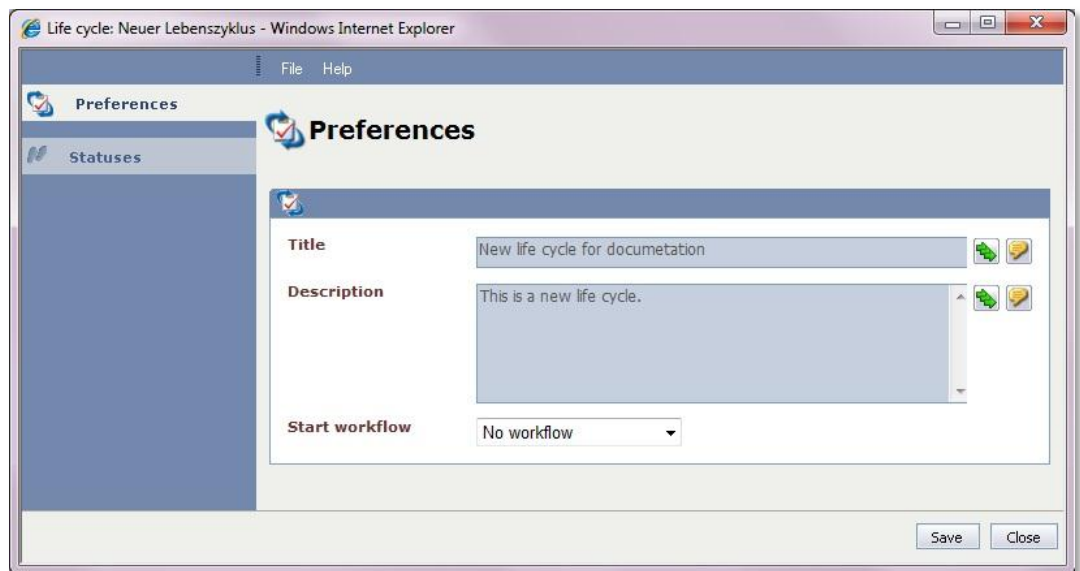


Figure 2-2

You can configure the following options on the *Preferences* tab:

Title: Enter a significant title for the life cycle here. In case of multiple system languages, you can enter an individual title for every language, which will be displayed as a friendly name for users using the respective language.

Description: Enter a description for the life cycle here.

Start workflow: Enter the task workflow to be used as soon as a task connected to this life cycle will be created here. Please mind that only workflows with the type *Task* can be used. For further information, please check the *WORKFLOW DESIGNER* document.

On the *Status* tab, you can now configure the various statuses for the life cycle.

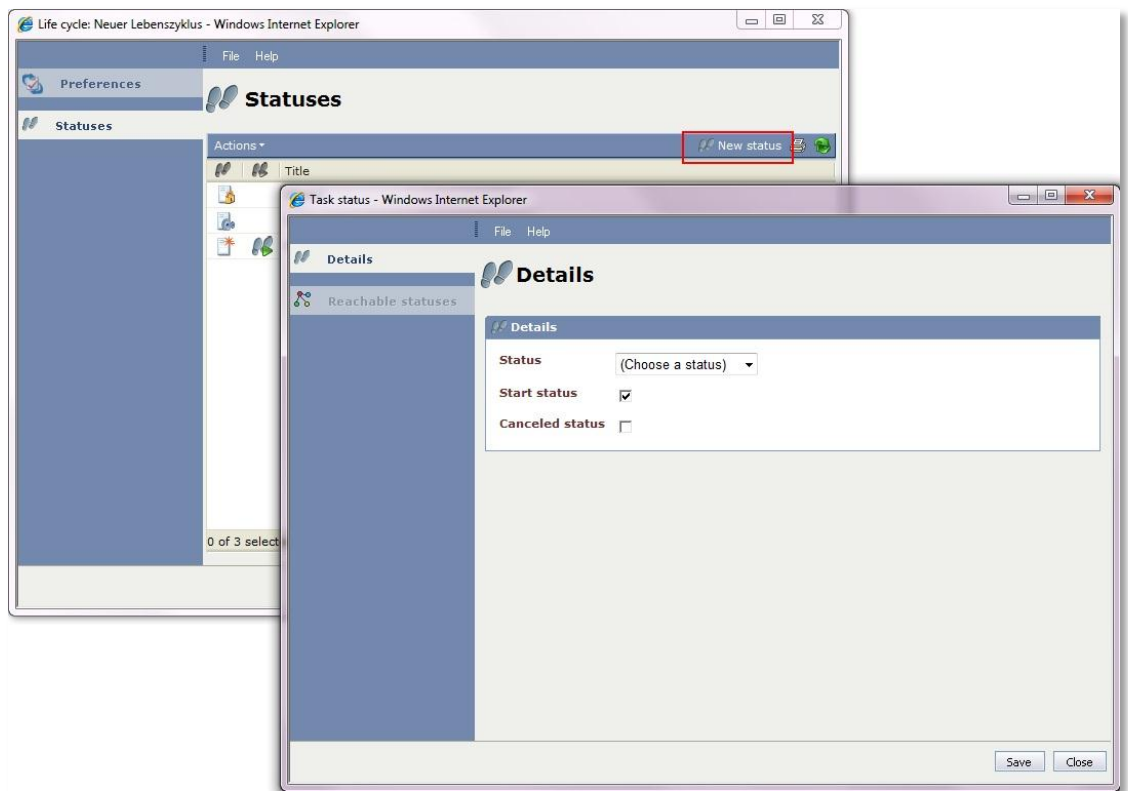


Figure 2-3

Click on the *New status* button. In the window now opening, you can select a status to be available for this life cycle's tasks. If this is the first status added, it will be set as the start status automatically.

Start status: The start status is the first status a task can obtain.

Canceled 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 *Canceled status*.

After clicking on *Save*, the second tab *Reachable statuses* will be available. You can, however, ignore it until you have created all of the designated statuses in the life cycle.

Switch to the *Reachable statuses* tab afterwards. Here, you can define the status(es) that can be reached from the current status.

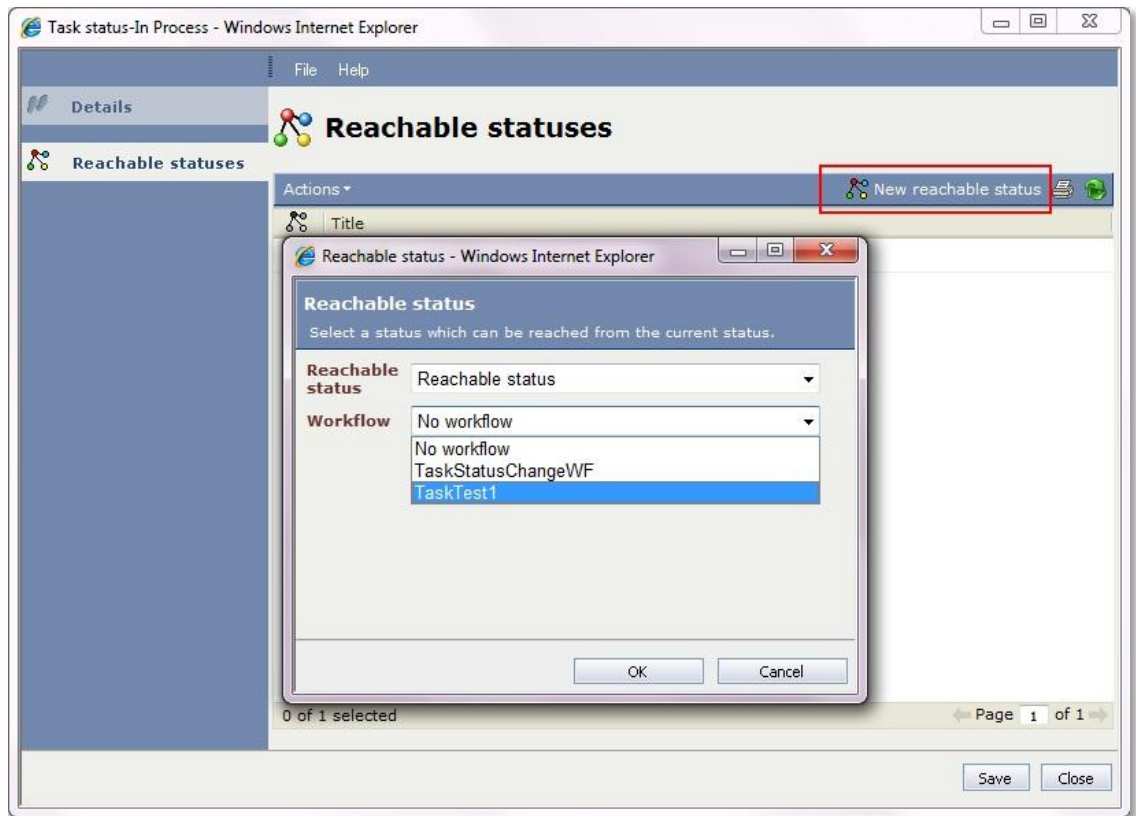


Figure 2-4

In order to define a new reachable status, click on the *New reachable status* button. In the dialogue now opening, you can configure the following options:

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

Workflow: Here, you can select a workflow to be initiated in parallel to the start workflow, as soon as a task reaches this status. The task or the task workflow item will then run through both workflows simultaneously.

2.3 Task Schema

In the menu item *Task Schema*, you have the option to create schemas for tasks. A task schema is similar to a ticket schema; similar settings can be made here.

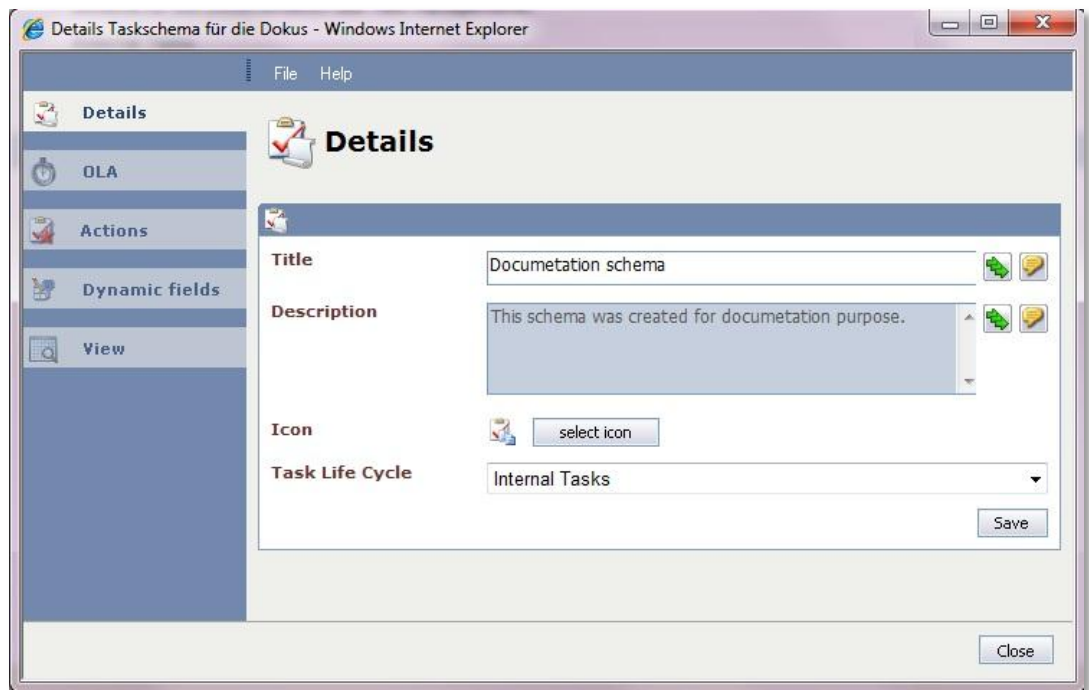


Figure 2-5

Double click on an existing schema in order to open it or click on the *New task schema* button. Subsequently, a dialogue will open, in which you can configure the entire task schema.

2.3.1 Details

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

Title: Enter a significant title for the task schema. You can enter a friendly name for every language available here as well.

Description: You can enter a short description here; when multiple languages are activated, you can enter it in different languages as well.

Icon: Select an icon for tasks using this schema.

Task life cycle: Select a previously created life cycle for tasks, which will be used by this task schema's tasks.

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

2.3.2 OLA

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

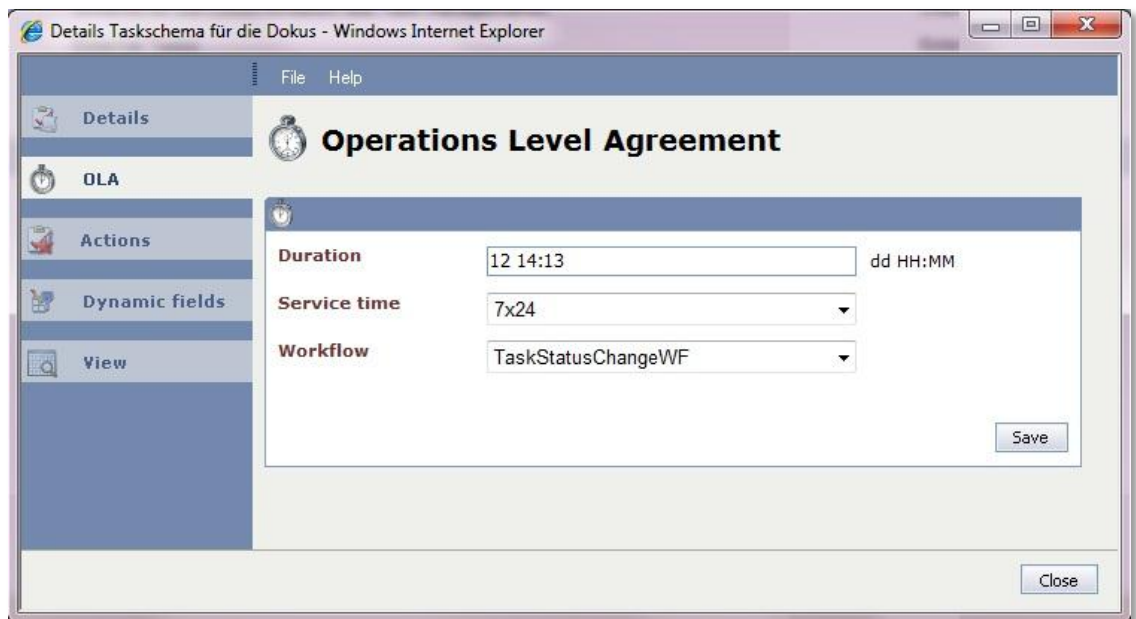


Figure 2-6

You can configure the following options here:

Duration: Enter here, how long a task of this schema is allowed to take, in the format *day hours:minutes* (e.g. 05 12:00 for five days and twelve hours).

Service time: Define the service times, during which the duration starts to run down, e.g. 7x24. The service times will be adopted from the SLM and new service times can be configured there as well. For further information, please check the SERVICE LEVEL MANAGEMENT documentation.

Workflow: Select an escalation workflow here. This workflow will be initiated for a task as soon as the duration has been exceeded.

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. If you want to delete an action, use the *Actions* menu.

Overview of the Actions

Accept task: Changes a task's owner. If a 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. This will be available in the task later on, 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.

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 to the current task can be created on the *Actions* tab.

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

Edit custom fields: Via this action, dynamic fields can be edited afterwards. Because the dynamic fields cannot be filled in during task creation, it is advisable to create this action in the start status of a task schema. The fields can then be edited via *FIELDS* → *DYNAMIC FIELDS*.

Edit expense default values: When 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: Via this action, the OLA can be changed afterwards in an already created task, e.g. if a too short default duration has been selected for this task. The OLA can be modified on the *Fields* tab, on which you can change the start, reminder, and end date.

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

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: Changes a task's owner. 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 handled 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.

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

Available Options

Name: Enter the designated name of 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 designated type of dynamic field here.

Format string: If a certain format is to be preset for the selected type, it can be entered here.

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

Example: An example will be displayed here.

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

2.3.5 View

Here, you can customize the fields' view. Later on, this view will not only be valid for the task itself but also for the task preview and the tickets containing this task; however, it can be configured in a way to make certain fields only available in certain views.

Click on *Add field* in order to add fields for the custom view. If you want to delete existing fields from the view, select the field with a simple click and click on *Delete* on the right.

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

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 designated field of the chosen data type here. For example, if you have selected *Dynamic fields* 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, you can enter it here; enter it 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's 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: Activate this option for the field to be displayed in the task detail dialogue.

Task preview: When this option has been activated, you can see the field in the task preview.

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

3 Creating Tasks

After having finished the configuration of the tasks, you have several options for creating tasks. You can generate tasks from tickets, let them be generated automatically from a workflow (via the Workflow plug-ins *Create task* and *Create task activity*; you can find further information on this topic in the WORKFLOW DESIGNER documentation), or create individual tasks in the Task Management.

3.1 Task Management

You can access the Task Management by clicking on *Tasks* in the left side bar.

Subsequently, an overview of the tasks will open. 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 their ticket and process schemas.

WARNING

Tickets containing tasks will only be displayed, if at least one of the 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 here. This is only possible via tickets. On the right, next to the folder/ticket view, you can find an overview of the existing tasks either in the folders or the ticket schemas.

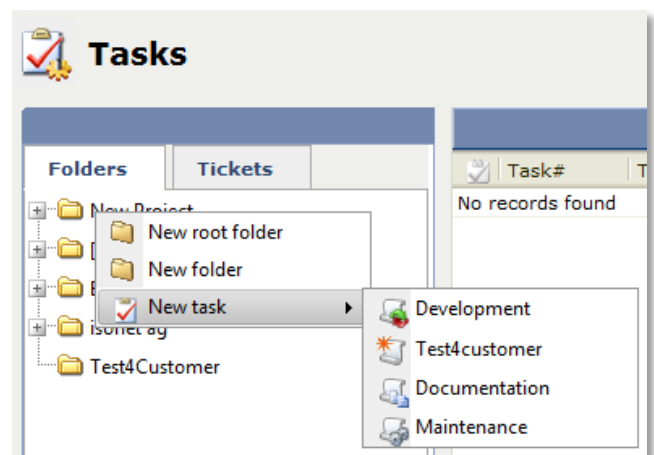


Figure 3-1

If there are tasks listed, you can open them 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 rights to do this (see also the USER MANAGEMENT documentation).

3.1.1 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.

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

WARNING

As soon as a folder has contained a task, it will not be possible any more to delete this folder via the context menu.

If you create a main folder, it will always be created on the top level. Normal folders can be interlaced in any order in those main folders.

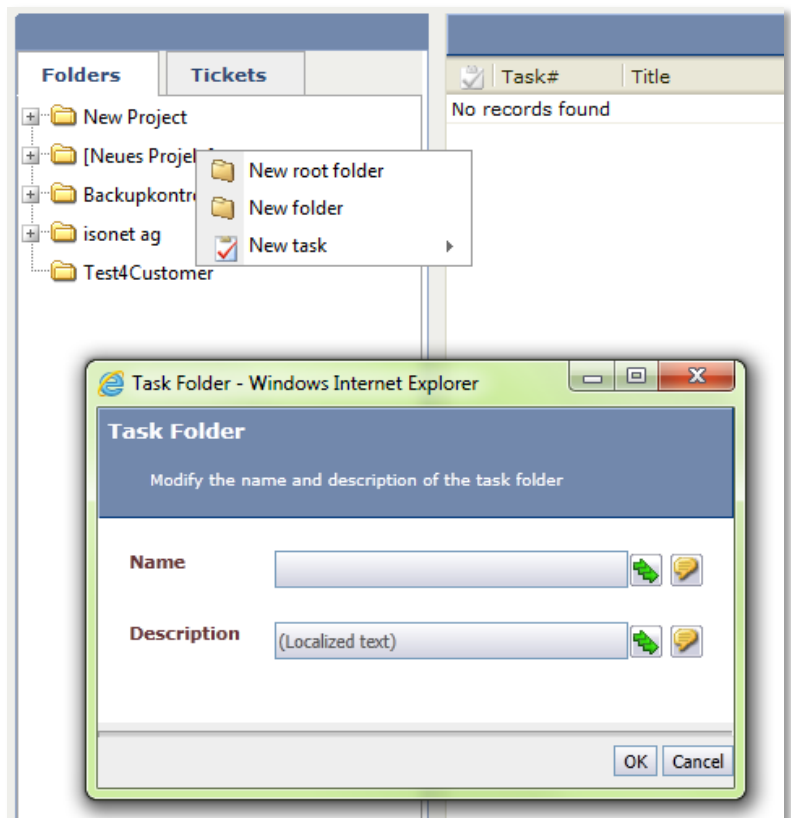


Figure 3-2

It is possible to specify a name and a description in every activated language for every folder.

PLEASE NOTE

If there is no folder in the Task Management yet, an empty tree node will be displayed in the hierarchy. In order to create a 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 to create the new task with.

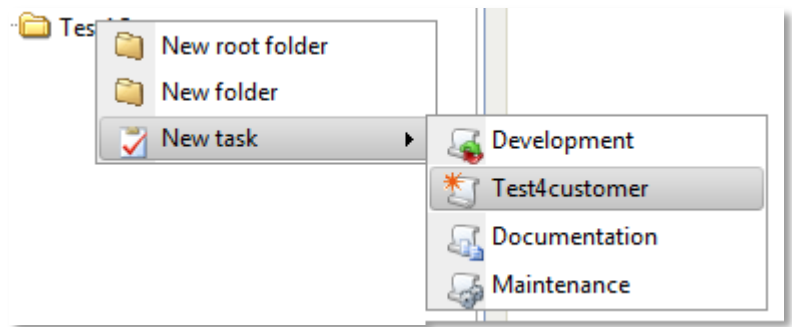


Figure 3-3

Select the designated task schema here and confirm it with a click. Subsequently, a new dialogue will open. First of all, general information on the task can be entered, irrespective of the task schema selected:

Title: You can enter a significant name for the new task here.

Description: Enter a description for the task here.

Executor Group: Select the executor group here. The task will then be displayed in the activity list of every member of this group. (A requirement for this is the start status being set to *Visible* and to *Visible in activity list*.)

Start: Enter a start date and time. 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: Enter the designated end date for the task here. If an OLA has been specified for the task schema, the end date will automatically be set to the defined time after the start date. If, however, another end date is to be specified for this task, you can enter it here.

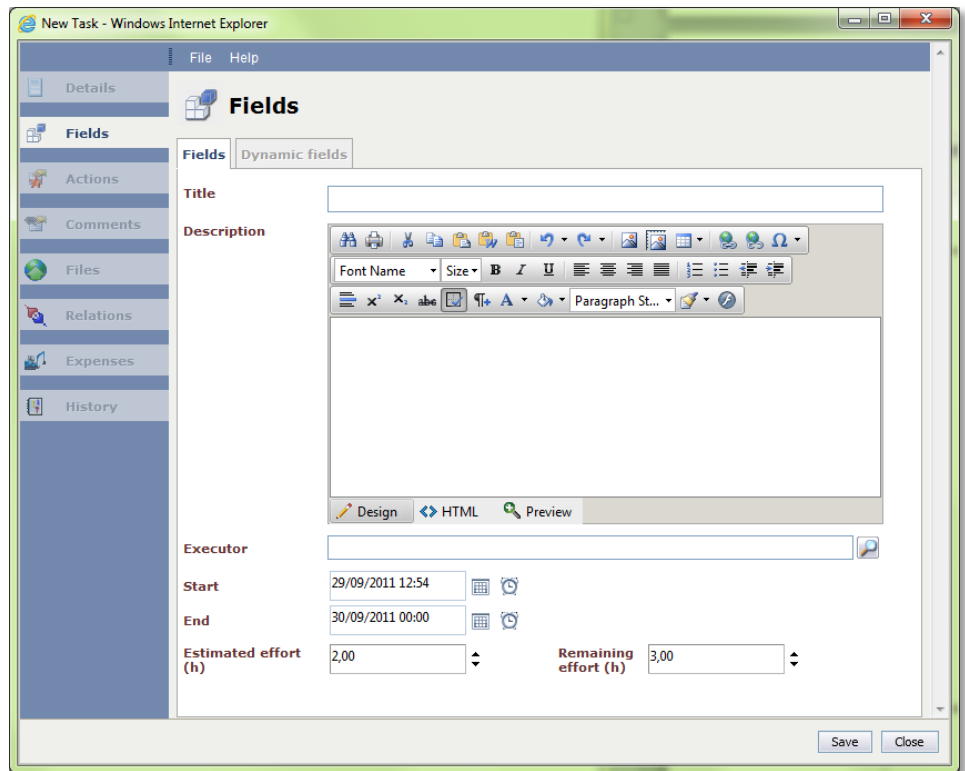


Figure 3-4

3.1.2 Creating Tasks from Tickets

If you want 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.

4 Structure of a Task

Tasks have a structure similar to the tickets.

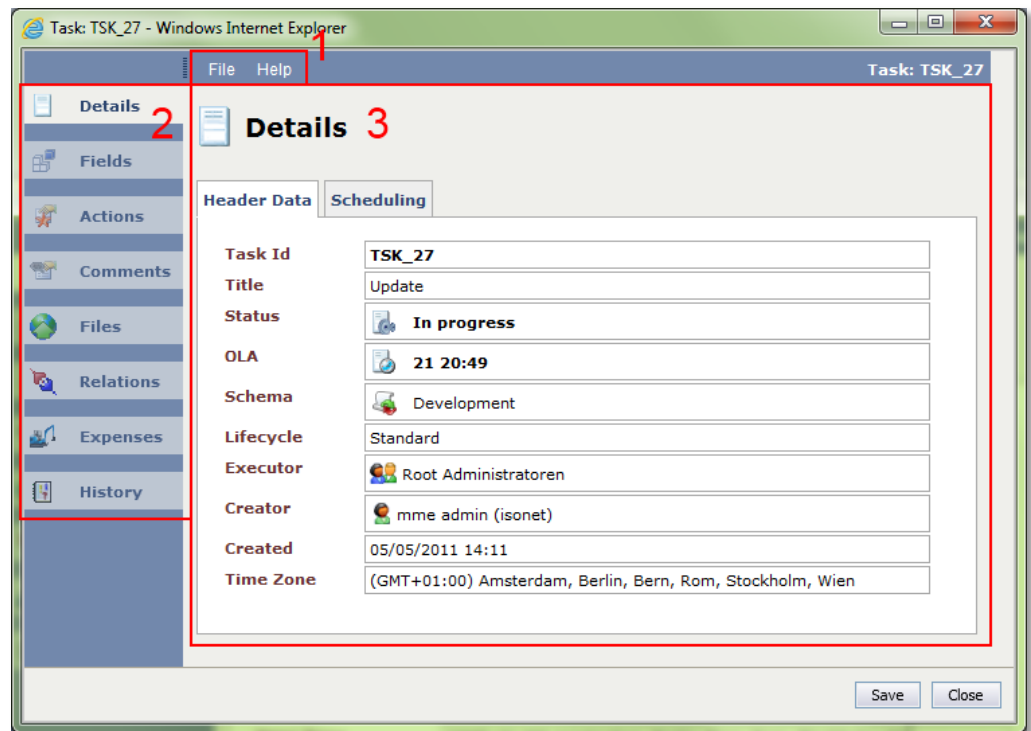


Figure 4-1

The top menu (1) contains the options to print the task's overview and to close the ticket view under *File*. Via *Help*, the system help and information on the system version can be displayed.

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

In the main window (3), all the information on the currently active tab is displayed.

4.1 Details

An overview of the task is displayed here in 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 run through a certain workflow always at certain times.

4.2 Fields

Under *Fields*, you can see two tabs, *Fields* and *Dynamic fields*. On the *Fields* tab, the fields to be filled in at task creation and available for every created task, are displayed. Via the two actions *Change title and description* and *Edit OLA*, the fields can also be modified afterwards.

On the second tab, *Dynamic fields*, the fields that can be configured independently for every task schema are displayed. If the action *Edit custom fields* has been activated, the fields can be edited here as well.

4.3 Actions

Here, currently pending actions, e.g. *Assign task* or *Link ticket*, are displayed and can be performed by the user.

4.4 Comments

Here, the comments regarding the task are displayed. If the action *Add comment* has been activated, they can be also added here.

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 task's expenses are displayed here. You can create expenses for the task here, e.g. the ones generated by solving the task.

4.8 History

Actions that have been either performed by the user or automatically by the system are listed here chronologically.

5 Statistics and Change Management

5.1 Statistics

By	Maik Wisatzke
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Replaces version	1.1
Release date	29.9.2011
Valid from	Immediately
Valid until	Cancellation
Document name	Task Management 3.1_EN

5.2 Change Control

VERSION	DATE	EXECUTED BY	CHANGE	COMMENTS
1.0	1.7.2008	Marco Mehl	Created	
1.1	20.8.2009	Maik Wisatzke	Revised	New design/new figures
3.0	7.9.2010	Maik Wisatzke	Revised	Complete revision
3.1	09.09.2011	Marco Mehl, Maik Wisatzke	Revised	Added note on empty Task Management and closed tasks in tickets

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