

Task Management

Tasks Overview

Managing Your Tickets with Tasks

Tickets should always be managed by a single group to allow for unity and customer relationship. The same group should manage the ticket from request to completion. A Task is a unit of work that needs to be completed as a step in resolving a ticket, but cannot be done by the assigned Support Member alone.

- If the solution to a ticket involves more than one action, procedure, or process, consider dividing the solution into separate Tasks.
- If the solution to a ticket involves more than one Support Group, instead of reassigning the ticket, simply assign the action as a task under the ticket.

Dividing the solution into separate Tasks can help you to better manage and monitor the incident request as it moves toward resolution. Smart IT allows you to add Tasks to incidents, work orders, and change requests.

Task and Task Groups

You can use a Task Template to add a Task to a ticket, or you can create an ad hoc Task. Task Templates are predefined Tasks that you can quickly add to an incident request. An ad hoc Task is created manually without using a Template. When using Task Templates, you can also add Tasks that are divided into subTasks. A Task that has subTasks is called a Task group. SubTasks in a Task group are called "children" of the Task group.

Although Tasks and Task groups are related to specific tickets, information about the Tasks and Task groups is stored on a separate Task form. You can relate an unlimited number of Tasks or Task groups to a ticket.

Creating Tasks

Introduction

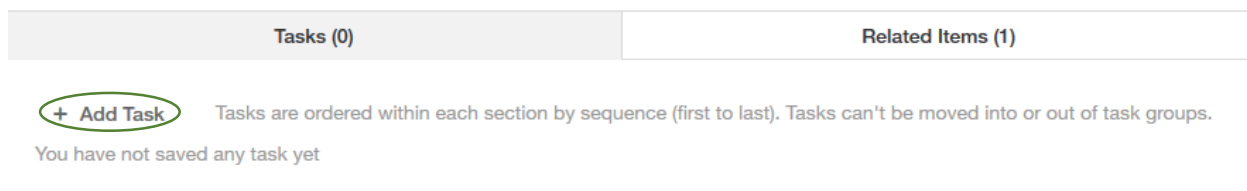
On the Tasks section on the ticket, users can perform the following actions:

- Add Blank Task—Add a new Task
- Add Task from Template—Add a Task by using a Task Template
- Reorder Tasks—Reorder the Tasks listed in the Tasks section

Adding a Task

You add Tasks directly from the ticket.

1. Open the ticket you need to add the Task to.
2. On the **Tasks** tab, click **+ Add Task**.



3. Select one of the following choices:

- **Add a blank Task**—Select this option to create the Task from a single Task Template, or to create an ad hoc Task.
- **Add a Task from a Template**—Select this option to create a Task from a single Task Template or Task group Template.

4. For an ad hoc Task, provide the **Task title**, **description**, and **priority**.

The screenshot shows a form with three main sections. On the left, there is a 'Task Title (required)' field with a placeholder 'Type a title for this task'. Below it is a 'Priority (required)' dropdown menu currently set to 'Low'. On the right, there is a 'Task Description' field with a placeholder 'Type a description of the problem'.

If creating an ad hoc Task, the option to fill out the ticket fields using at Template is still available under **Select Task Template**.

(Optional) If you are using a Template, you can search for a Template by typing a part of the name in the search field. Alternatively, you can filter the list of Templates using the following criteria:

Type	Activity type
Single Tasks	Manual —An action (for example, replacing a cable) is performed by a person
	Automatic —A predefined instruction is automatically executed by the Task
Task Groups	Standard —A flow mechanism establishes how the Tasks relate to each other
	Sequencing —Sequencing strictly specifies the order of Tasks

The screenshot shows a dialog box titled 'Select Task Template'. It has two dropdown menus: 'Type' set to 'Single tasks' and 'Activity Type' set to 'Manual'. Below these is a search bar with a magnifying glass icon and the text 'Type to search templates'.

From the search results, select the Task to use to create the Task.

5. **Save** the Task.

After adding a Task, update Task details. For example, schedule a start and stop time, add attachments, or select an assignee. If the ticket is auto-assigned, the Task uses the assignment rules of your organization.

Task Management

Adding Attachments to Tasks

When using Smart IT on mobile devices, you can attach files from the following locations:

- Files stored on the local devices.
- Files stored on cloud storage such as, Google Drive, Dropbox, OneDrive, and Box.

On iOS devices, the Add Attachment option, and on Android devices, the From files and Dropbox options enables you to attach files that are on cloud storage when you create or edit change requests, and when you add a comment.

Admin Note: The administrator can configure the attachment criteria, and the supported file extensions in BMC Remedy ITSM, in the Attachment Security tab of the Server Information form.

Assigning Tasks

Tasks can be assigned to the same person, to several people, or to a support group. The person or support group to whom the Task is assigned is the **Task implementer**. After a Task or Task group is assigned to a Task implementer, the Task implementer receives notifications to perform each of the assigned Tasks. Task implementers can log their progress as they complete each Task.

When you create or edit a Task, you can quickly assign it to yourself by using the [Assign to me](#) link. You will see the Assign to me link only if you belong to the same support group to which the Task is assigned.

- If you are part of only one support group, after you click the [Assign to me](#) link, the Task is assigned to you without opening the **Update Assignment** pane.
- If you are part of multiple support groups, when you click the [Assign to me](#) link, the **Update Assignment** pane is displayed on the Task profile. The system searches for support groups to which you belong across all support companies, support organizations, and support groups. You must select one of the search result and save the selection.

When a Task is assigned to you, it appears in the Ticket Console as separate ticket. When you open the Task, it has a link back to the parent ticket, which you can open to see the full context of the Task.

Reorder Tasks

If there is a change in the priority of planned Tasks, you can change the Task sequence as required. Smart IT provides the capability to change Task sequences of Staged Tasks by dragging them from within the Task list or by manually updating their sequence number.

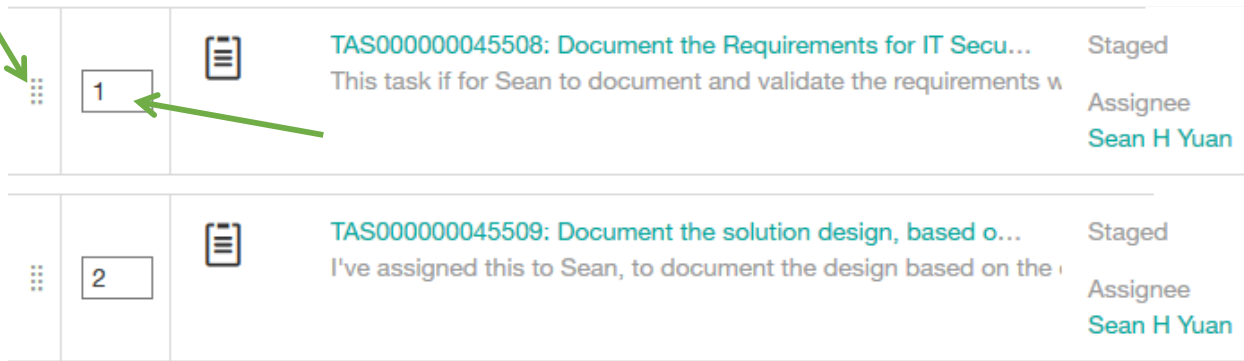
Considerations





When reordering Tasks, consider the following:

- Only Staged Tasks can be reordered.
- The Task list is in the Edit mode when moving Tasks and you cannot click a Task to work on it, in this mode.
- A Task that is a part of a Task group cannot be moved outside the parent Task group. However, the entire Task group can be moved as a single unit.
- A Task cannot be moved above a Task or Task group that is closed or bypassed.
- Child Tasks with Standard Task group cannot be moved. Only child Tasks with Sequencing Task group can be moved.
- Nested Tasks are read-only and cannot be reordered.
- Nested Task groups can be reordered, but Tasks within nested Task groups cannot be reordered.
- For change management Tasks, when Task phasing is enabled, you cannot drag a Task from its existing phase to another phase. The same rule applies to Task groups.

Reorder Tasks

1. From the ticket, scroll down to the Task list.



	<input type="text" value="1"/>	 TAS000000045508: Document the Requirements for IT Secu... This task if for Sean to document and validate the requirements w	Staged Assignee Sean H Yuan
	<input type="text" value="2"/>	 TAS000000045509: Document the solution design, based o... I've assigned this to Sean, to document the design based on the	Staged Assignee Sean H Yuan

Tasks that can be reordered have a grabber and a sequence number input box.

2. Click or tap the drag and drop icon and move the Task to the desired place in the Task list.
3. When you drag a Task to a new position in the Task list, the sequence of all Tasks is automatically updated.
4. If you want two Tasks to run in parallel, you must manually enter the sequence number for the Tasks in the input box provided.
5. The **Save** and **Revert** options are enabled when you move any Task.
6. Click or tap **Save** after you have completed reordering your Task list.

Reordering can move a staged Task to an active state, for example, to the **Assigned** state. As long as you are in the **Edit** mode, you can continue to reorder this Task. Once you save your changes, you cannot reorder these Tasks as they are now active.