



cockpit
IT Service Manager

Tasks - Configuration guide

FAQ document

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Introduction

I. Objectives

- To organize and plan the recurring tasks to be carried out by the operators
- To add punctual tasks to the queue
- To assign tasks to teams and operators
- To view tasks scheduled by day or by period

II. Definitions

Task: Manual action, scheduled in a recurring or punctual manner and supported by operators.

Examples: Planning billing processing, changing backup tapes, checking locking of doors in a room, etc.

Queue: The tasks to be executed are placed in a queue and disappear from the queue when they are acknowledged by the operators.

III. Principles

- The "Tasks" module is a scheduler for the tasks to be carried out and organizes the collaboration between the operators of the teams.
- The tasks to be executed are placed in a queue and remain there until they are manually acknowledged by an operator.
- By acknowledging a task, the operator indicates that it has been processed.
- Acknowledged tasks are stored in the history, thus ensuring traceability of the actions.

Configuration

I. Task types

Menu: Tasks > Configuration > Types

Principle: A task necessarily belongs to a type, so the types must be created before the tasks.

Main parameters	
Fields	Information
Description (mandatory)	The description is the name of the type, it's unique. In the configuration menu the types appear under their description. The description appears in the lists when a type has no translation.
Color	Associate a color to a task type to better differentiate them in the lists.
Purge period	Acknowledged tasks are automatically deleted. Period after which tasks are removed from the history.
Organizations	Select the organizations where the software category appears.
Translations	Only one translation can be associated with each language. The translation used depends on the user's language.

Deletion management:

When a type associated with tasks is deleted, it is proposed to associate the tasks with a new type, thus no task is deleted.

Task management

I. List of recurring tasks

Menu: Tasks > Recurring tasks > Management

Main actions	
Actions	Information
Delete	Deleting a task does not delete tasks from the history or tasks in the queue.
Disable	Disables a task so that it is no longer inserted into the queue while retaining it. Disabling a task does not affect tasks in the queue.
Insert into queue	Inserts the task immediately into the queue, without affecting its scheduling.
Next execution	Indicates the date and time of the next scheduled execution in the schedule regardless of manual running or task status.

II. Editing recurring tasks

Menu: Tasks > Recurring tasks > Management

Objectives: To manage and schedule recurring tasks.

A. "Settings" tab

Principle: Used to describe the task and assign it.

Main parameters	
Fields	Information
Organization	A task belongs to only one organization
Team	A task belongs to only one team. An operator only sees the tasks of the teams to which they belong.
Operator (optional)	Choose an operator from the previously selected team. A task assigned to an operator remains visible to other operators. The assignment of the task can be changed by the operators when it is in the queue. Leave the field blank to explicitly assign the task to all team members.
Estimated workload	This is the time that the operator is supposed to spend completing the task. This time is taken into account for the workload estimation calculations.
Obligatory entry of workload	Active / Inactive Check this option to force the operator to enter the actual time spent executing the task.
Alert	Indicate the time scales beyond which an unacknowledged task alert is raised (2 thresholds).

	Alert 1 must be less than Alert 2.
Status	Active / Inactive An inactive task is not placed in the queue and is therefore not visible to the operators. Making a task inactive means it is no longer executed.

B. "Documents" tab

Principle: The documents associated with the task (document, link, operating mode) will be accessible directly from the task queue.

Main parameters	
Fields	Information
Related Document	Allows the task to be linked to a document in the knowledge base.
Oblige reading	Check this option to force the operator to open the knowledge base document related to the task. If the operator has never opened the current version of the associated document, they will not be able to acknowledge the task.
Associated links	Allows the task to be linked to an external element via a URL (other document base, etc.)
Procedure	Allows direct description of the task to perform.

C. "Scheduling" tab

Principle: The recurring task is placed in the queue according to a schedule.

Main parameters	
Fields	Information
Anticipation period	How far ahead of execution time the task is placed in the queue. The objective is to help operators anticipate the workload. Example: A task scheduled for 15:00 with a 30-minute anticipation period will appear in the queue at 14:30.
Time zone	Specify the time zone used to place the tasks into the queue (the default is the time zone of the organization).
Parent task	The schedule of the current task is no longer configurable because the task follows the scheduling of its parent task.
Manual scheduling	Allows a task to be configured without assigning it a schedule. The task can be inserted into the queue manually.

There are different types of schedules; to assign a schedule to a task click the "Add a schedule" button.
It is possible to add several schedules to the same task.

1. Weekly scheduling

Scheduling:

Allows scheduling of a task from one to X times a week. Just check an area to schedule the task.

The precision of the schedule is 1/4 hour. It is possible to schedule a task every 15 minutes or just once a week.

It is possible to check / uncheck the whole week, whole day or the same time each day by using the column and row headings.

Holidays:

The "Use daily schedule" option allows scheduling to be managed during holidays.

- Checked: The scheduler follows the day schedule regardless of the organization's holidays.

Example: A task planned every Monday will also be scheduled on Bank Holiday Mondays.

- Unchecked: The scheduler follows the "Holiday" schedule line during organization holidays.

Examples: If nothing is noted on the "Holiday" line the task will not be scheduled on holidays. If a task is scheduled, it will be raised for all holidays of the organization.

Examples:

- Each hour from 08:00 to 18:00 Monday to Friday, except holidays.

Weekly schedule																									
Week	0h	1h	2h	3h	4h	5h	6h	7h	8h	9h	10h	11h	12h	13h	14h	15h	16h	17h	18h	19h	20h	21h	22h	23h	
	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	
Monday									✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						
Tuesday									✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						
Wednesday									✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						
Thursday									✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						
Friday									✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						
Saturday																									
Sunday																									
Holiday	<input type="checkbox"/> Use day of week planning during holidays																								

- Monday at 11:15, Wednesday at 14:30, Friday at 16:45, except holidays.

Weekly schedule																									
Week	0h	1h	2h	3h	4h	5h	6h	7h	8h	9h	10h	11h	12h	13h	14h	15h	16h	17h	18h	19h	20h	21h	22h	23h	
	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	
Monday												✓													
Tuesday																									
Wednesday															✓										
Thursday																									
Friday																			✓						
Saturday																									
Sunday																									
Holiday	<input type="checkbox"/> Use day of week planning during holidays																								

- Every Tuesday at 10:00, including holiday Tuesdays.

Weekly schedule																									
Week	0h	1h	2h	3h	4h	5h	6h	7h	8h	9h	10h	11h	12h	13h	14h	15h	16h	17h	18h	19h	20h	21h	22h	23h	
Monday																									
Tuesday											✓														
Wednesday																									
Thursday																									
Friday																									
Saturday																									
Sunday																									
Holiday																									

Use day of week planning during holidays

2. Monthly scheduling

Scheduling:

Schedules a task once a month at a fixed date and time.

It is necessary to indicate the day of the month and specify whether to count from the beginning or the end of the month.

It is possible to count the number of days by filtering:

- Every day
- Work day (Monday to Friday except holidays)
- Business days (Monday to Saturday except holidays)
- 1 particular day of the week (only Mondays for example)

Examples:

- The first of the month at noon.

Monthly schedule		
<input checked="" type="radio"/>	To be executed on the <input type="text" value="01"/> day of every month	From the beginning of the month <input type="text" value=""/> at <input type="text" value="12"/> : <input type="text" value="00"/>
<input type="radio"/>	To be executed on the <input type="text" value=""/> business day (Mon.-Sat.) of every month	
<input type="radio"/>	To be executed on the <input type="text" value=""/> workday (Mon.-Fri.) of every month	
<input type="radio"/>	To be executed on the <input type="text" value=""/> <input type="text" value=""/> of every month	

The task will be inserted:

- 1st January at 12:00
- 1st February at 12:00
- 1st March at 12:00
- etc.

- The last day of the month at midnight

Monthly schedule		
<input checked="" type="radio"/>	To be executed on the 01 day of every month	
<input type="radio"/>	To be executed on the business day (Mon.-Sat.) of every month	From the end of the month at 00:00
<input type="radio"/>	To be executed on the workday (Mon.-Fri.) of every month	
<input type="radio"/>	To be executed on the of every month	

The task will be inserted:

- 31st January at 00:00
- 28th February at 00:00
- 31st March at 00:00
- etc.

- The first work day of the month at 08:00

Monthly schedule		
<input type="radio"/>	To be executed on the day of every month	From the beginning of the month at 08:00
<input type="radio"/>	To be executed on the business day (Mon.-Sat.) of every month	
<input checked="" type="radio"/>	To be executed on the workday (Mon.-Fri.) of every month	
<input type="radio"/>	To be executed on the of every month	

The task will be inserted:

- Monday 2nd January 2017 at 08:00
- Wednesday 1st February 2017 at 08:00
- Wednesday 1st March 2017 at 08:00
- Monday 3rd April 2017 at 08:00
- etc.

- The second Saturday of the month at 20:20.

Monthly schedule		
<input type="radio"/>	To be executed on the day of every month	From the beginning of the month at 20:20
<input type="radio"/>	To be executed on the business day (Mon.-Sat.) of every month	
<input type="radio"/>	To be executed on the workday (Mon.-Fri.) of every month	
<input checked="" type="radio"/>	To be executed on the 02 Saturday of every month	

The task will be inserted:

- Saturday 14th January 2017 at 20:20
- Saturday 11th February 2017 at 20:20
- Saturday 11th March 2017 at 20:20
- etc.


3. Annual scheduling

Scheduling:

Schedules a task once a year at a fixed date and time.

Example:

- Every 22nd April at 01:38

✕	Yearly schedule	
+	Dates	
✕	To be executed on the <input type="text" value="22/04"/> 	of every year at <input type="text" value="01"/> : <input type="text" value="38"/>



4. Specific scheduling

Scheduling:

Schedules a task just once at a fixed date and time.

Examples:

- 8th February 2017 at 17:00
- 3rd May 2018 at 08:00

✕	Custom schedule	
+	Dates	
✕	<input type="text" value="08/02/17 17:00"/> 	
✕	<input type="text" value="03/05/18 08:00"/> 	

III. Punctual tasks

Menu: Tasks > Punctual tasks > New

Objective: Manually add a task to the queue.

Operation:

Enter the fields in the same way as for recurring tasks.

The "Scheduling" part is not present; it is replaced by the "Execution Date" field.

There is no anticipation delay; as soon as the task is saved it is inserted into the queue.

The task is inserted directly into the queue and will be kept in the history after acknowledgment.

Document end