



cockpit
IT Service Manager

Tasks - Utilization guide

FAQ document

Table of contents

Introduction.....	3
I.Objectives.....	3
II.Definitions.....	3
III.Principles.....	3
Processing the tasks.....	4
I.Queue management.....	4
II.History.....	5
Statistics.....	6
I.Use of graphics.....	6
II.Statistics of tasks acknowledged.....	6
III.Workload estimation.....	6
Recurring tasks.....	8
I.Scheduling.....	8
II.Tasks scheduled between 2 dates.....	8

Introduction

I. Objectives

- To control the existence of tasks in the queue
- To assign, perform and acknowledge tasks in the queue
- To view statistics on loading and processing tasks

II. Definitions

Task: Manual action, scheduled in a recurring or one-off 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.

Estimated workload: Time that the operator is supposed to need to execute the task. This time is entered in the task setup.

Actual workload: Entered when the task is acknowledged and corresponds to the time the operator spent on the execution of the task.

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.

Processing the tasks

I. Queue management

Menu: Tasks > Completions > To do

Objectives: To view, take on and acknowledge tasks

Operation:

Each line corresponds to one task execution.

Example: A task scheduled every 30 minutes will insert a line in the queue every 30 minutes.

Main parameters	
Fields	Information
Operator	A task assigned to an operator remains visible to the other operators of the team. The assignment of a task can be modified by the other members of the team. A task that is not assigned to an operator is explicitly assigned to the entire team.
Workload	This is the estimated workload entered in the task setup. It is the time that the operator is supposed to spend in the execution of the task.
Execution date	Date and time of the expected execution of the task. The task usually arrives in the queue before its execution in order to anticipate it (reading the document, operating mode, etc.), this is the anticipation period.
Delay	Indicates whether the execution of the task is late or on schedule. Green circle: the task has not reached its first alert threshold, no delay. Orange triangle: The task has reached its first alert threshold. Red square: the task has reached its second alert threshold. The deadlines are kept in the history and used in the statistics.

For each task the following actions are possible:

Actions per task	
Actions	Information
Direct acknowledgement	Acknowledging the task deletes it from the queue and saves it in the task history. The workload used is that assigned in the task parameters. The status of the task is "Success". The icon for this action does not appear when a workload must be manually entered before the task is acknowledged. The icon for this action does not appear when the linked document must be read (at least once) before the job is acknowledged.
Acknowledgement with notes	Displays a window with information about the task (organization, criticality, estimated workload, delay, etc.). Some fields can be modified: Status: Indicates whether the task was successfully executed or the operator encountered problems. The status is used in statistics. Workload: By default the workload indicated is the estimated workload, it is possible to change this.

	<p>A manually entered workload will be used in workload statistics. Manual entry of the workload may be mandatory (depending on the task parameters).</p> <p>Comments: Free text associated with this task execution and is visible in the history.</p> <p>External reference: Free text field (up to 50 characters) where ticket numbers from third party tools can be entered.</p> <p>Addition of an attachment.</p>
Assign	<p>Assigns the task to an operator in the team. Appears only if a job is not assigned to an operator.</p>
Deassign	<p>Deassigns the task from the operator, the task remains assigned to the team. Appears only if a job is assigned to an operator.</p>
Edit	<p>Displays the task setup. Changing the parameters will apply to all jobs to be placed in the queue, not to jobs already in the queue.</p>
Copy	<p>Create a new task</p>
Next run	<p>Indicates the date and time of the next execution of the task according to the schedule. Does not take into account manual insertions. For a one-time task, indicates the date and time of task execution.</p>
Create a ticket	<p>Creation of a ticket containing task elements (Description, criticality, estimated workload, etc.).</p>

II. History

Menu: Tasks > Completions > Latest acknowledgments / History

Objectives: To search for acknowledged tasks.

Operation:

- Each line corresponds to an acknowledged task.
- The "Restore" button re-injects the task into the queue, retaining its initial execution date.
- The "Execution date", "Acknowledgment Date" and "Delay" fields allow tasks executed late to be noted.
- The "Status" and "Comments" fields allow the tasks for which the operators have encountered problems to be seen.
- The "Latest acknowledgments" menu displays the last 200 acknowledged tasks.

Statistics

I. Use of graphics

All metrics graphics work on the same principles:

- The graphs can be printed and exported.
- Duration: Depending on the size of the period selected, the time unit automatically adjusts itself to time, day, or month.
- Workload: Depending on the workload to be displayed, it will be displayed in minutes or hours.
- Graphics with "Reset zoom" button: Select a zone to zoom with the mouse, click the "Reset zoom" button to return to the initial state.
- In the selection menus, check "Show graphics tables" to display the values used to construct the graphics in a table.

II. Statistics of tasks acknowledged

Menu: Tasks > Statistics

Objective:

- To obtain different views of the history of processed tasks (by team, organization, criticality, etc.)
- To evaluate past workload (by day, organization, team, etc.)

Principles:

- The "Acknowledgments" menu views are based on acknowledged tasks, the tasks still in the queue are not taken into account (including for workload calculations).
- The workload calculations graphs take into account the workload entered manually by the operator. If the operator does not change the workload, the estimated workload is used.

Operation:

The different views allow display of the statistics for acknowledged tasks:

- By periods
- Based on filters (Organization, Task Type, Criticality, etc.)
- By organization, team or operator

Note: When an operator, team, or organization does not appear, it means that there is no data for the selected period.
Example: An operator that is not visible did not acknowledge a task.

III. Workload estimation

Menu: Tasks > Load estimation

Objective: To obtain a graphical view of the workload over a past or future period

Principles:

The menu views are based on:

- The estimated workload of the tasks, in other words, the workload specified in the task setup.

Example: A task estimated at 30 minutes will count for 30 minutes even if the operator indicates 20 minutes.

- The scheduling of the tasks.

Example: A task scheduled at 8am will be counted at 8am even if it is acknowledged at 9am.

Operation:

The "Typical week" menu shows a workload graph for each day of the week:

- The granularity is 15 minutes
- Data can be filtered by organization, team, criticality, etc.
- Based on the previous week

The "Between 2 dates" menu shows a workload graph for the selected period:

- The workload is smoothed per hour or per day depending on the duration
- The data can be filtered by organization, team, criticality, etc.

Recurring tasks

I. Scheduling

Menu: Tasks > Recurring tasks > Schedule

Objective: To obtain an overview of task planning for each day of the week, for each day of the month, for each day of the year.

Operation:

Each tab corresponds to a day of the week (Monday, Tuesday, etc.) or to a period (monthly, annual). Click on the tabs to view the tasks, their scheduling and their estimated workload.

II. Tasks scheduled between 2 dates

Menu: Tasks > Recurring tasks > Between 2 dates

Objective: To list all occurrences of tasks for a future period. Allows anticipation of upcoming workloads.

Operation:

The view displays all instances of tasks that will be placed in the queue between 2 dates.

The start date of the selection must be in the future.

Note: Deleting a task from this menu deletes the task and therefore all planned schedules. It is not possible to remove only one occurrence in the queue.

Document end