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Introduction

Purpose
The purpose of this Student Guide is to provide Remedy users with the necessary information to find, create, update, and close Tasks in Remedy.

Scope
This Student Guide addresses the use of Tasks within the Remedy Incident and Change modules. With regards to Change tickets, this document focuses only on the creation and completion of Tasks for the Implementation Phase.

The target audience for this document is second level support staff but the information may also benefit Manitoba eHealth management and Service Desk staff.

Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📚</td>
<td>This icon will point to reference sources that contain more information on the topic.</td>
</tr>
<tr>
<td>📝</td>
<td>This icon indicates that the information is an important business rule, principle or standard in the Incident or Change Management process.</td>
</tr>
<tr>
<td>🔴</td>
<td>This icon warns of the consequences of doing or not doing a certain action.</td>
</tr>
<tr>
<td>💡</td>
<td>This icon identifies a tip or a shortcut.</td>
</tr>
</tbody>
</table>
Tasks and eHealth Processes

The following documents provide details on the Manitoba eHealth Incident Management and Change Management processes.

- Incident_Mgmt Process Guide
- Incident_Mgmt Process Principle Guide
- Incident_Mgmt Process Workflow
- Change_Mgmt Process Guide
- Change_Mgmt Process Principle Guide
- Change_Mgmt Process Workflow

See the “References” section on page 31 for a description of how to access these documents.

Incident Management

Tasks should only be used when Incident Type = User Service Request.

- Incident (Service Request) → Task(s)
- Incident (Break/Fix) → No Tasks

Tasks should not be used in Break/Fix situations because they do not have automated escalations and resolution targets that drive the rapid restoration of service that is needed when a service is degraded or down.

Change Management

- The use of the Task feature in Remedy is optional for Change tickets. If a Change Coordinator decides not to use the Task feature, then all Task details and assignments must still be documented within the RFC (Request For Change) as part of the Implementation or Release Plan.
- The Task feature should NOT be relied upon to secure resources or communicate Task assignment.
- Do not create a Task for work that should be submitted as a separate RFC.
Overview of Tasks

Ticket Relationships

Tasks may be used in Remedy to assign work that needs to be performed in order to fulfill a service request or a request for change. Tasks are created from within an Incident or Change (parent) ticket. Multiple Tasks may be associated with each parent ticket (no limit).

You must close all child Tasks in order to close the parent ticket. The following messages will appear if you try to resolve an Incident or complete an RFC that has open Tasks.

- There are open tasks that exist for this incident. Please close these tasks before resolving this incident (ANERR 45354)
- This Change Request has at least one open task or task group. Close all children tasks before setting Change Status to Completed orClosed (ANERR 45075)

Change Ticket Task Phases

In a Change ticket, Tasks may be associated with one of three phases in the parent RFC: Review, Business Approval, Implementation.

The Phase in which the Task is created determines when it will become active in the lifecycle of the parent ticket.

1. **Initiate**
   - Review Tasks initiate when Process flow changes to Initiate Approval

2. **Business Approval**
   - Business Approval Tasks initiate when Process flow changes to Review & Authorize

3. **Implementation**
   - Implementation Tasks initiate when Process flow changes to Implement Normal

This document focuses on Implementation Tasks only.
## Task Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staged</td>
<td>The Task has been created but is not yet active (the Task cannot be completed); usually because the parent ticket has not been moved to the appropriate Status or another Task must be completed first</td>
<td>Automatic</td>
</tr>
<tr>
<td>Pending</td>
<td>The Task is now active</td>
<td>Automatic</td>
</tr>
<tr>
<td>Assigned</td>
<td>• Pending - An individual has not yet been assigned to the Task</td>
<td>Manually selected</td>
</tr>
<tr>
<td></td>
<td>• Assigned - The Task is assigned to an individual and may be completed</td>
<td>Manually selected</td>
</tr>
<tr>
<td>Work in Progress</td>
<td>The Task has been started; populates the Actual Start Date of the Task</td>
<td>Manually selected</td>
</tr>
<tr>
<td>Pending</td>
<td>The Task has been temporarily put on hold</td>
<td>Manually selected</td>
</tr>
<tr>
<td>Closed</td>
<td>The Task has been completed or canceled</td>
<td>Manually selected</td>
</tr>
</tbody>
</table>

### Task Workflow

**INCIDENT TICKET**

Service Request! → Submitter
- Create Incident ticket (new ticket or existing template)
- Set Incident Type to User Service Request

Submitter/Inc. Assignee
- Add Tasks >> Ad hoc or Task Template
- Include required details in Task form
- Review & establish Task sequence

Queue Mgr
- Open each Task & assign resource

Inc. Assignee
- Change Status of Incident to In Progress to activate the first Task

Task Assignee
- View Task and update as required; enter Task’s Actual Start Date
- To automatically populate Task’s Actual Start Date, change Status to Work In Progress
- Add applicable Task details. For example:
  - Work Info (Details)
  - Dates
  - Attachments
  - Status (if req)

Task Assignee
- Close Task by updating Status to Closed; enter task’s Actual End Date
- When Status is set to “Closed”, Status Reason automatically defaults to “Success”

Inc. Assignee
- Ensure all Tasks are closed and all details are logged; resolve & close the Incident

An automatic notification is sent to each assignee based on Task sequence.
CHANGE TICKET

The following workflow is for **Implementation** Tasks.

### Task Notifications

The following system generated email notifications will be sent for Tasks (no escalations):

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Trigger</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queue Manager</td>
<td>Task is assigned to his/her group and the Task Status = Pending (i.e. the Task is active but no one has been assigned to it)</td>
</tr>
<tr>
<td>Task Assignee</td>
<td>Task Status = Assigned</td>
</tr>
<tr>
<td>Task Assignee</td>
<td>Someone else adds a Work Info entry into his/her Task</td>
</tr>
<tr>
<td>Owner of Parent Ticket</td>
<td>Task Status = Closed</td>
</tr>
</tbody>
</table>
Working with Tasks

Overview Console

By default, open Tasks appear at the bottom of the list in your Overview Console. The Request ID starts with **TAS**.

Task settings for the Overview Console are controlled in **Application Preferences > Task Management tab**.

If you open a Task from the Overview Console, it opens in the **main Remedy window**.

There is no Close button in this Task form. Use the Breadcrumb to get back to the Overview Console.
OPENING THE TASK CONSOLE

- Select **Applications > Quick Links > Shift + eHealth Task Management Console.**

**Quick Links**
- Home Page
- Approval Central
- eHealth Task Management Console
- AR System Report Console

If you do not hold the Shift key down before selecting eHealth Task Management Console, the Task Console will open in the main Remedy window making it difficult to get back to your Overview Console. The Shift key forces the Task Console to open in a new window.

- Select **Task Console** from the Functions section at the left side of the Incident or Change Console.

**Note:** The Task Console automatically opens in a new window from this location.

Add/remove columns, set Refresh Rate, save settings
If you open a Task from the Task Console, it opens in a separate window.

**FILTERING TASKS**

1. Select the options that you want in the **Show** and/or **Filter By** sections at the top of the Task Console.

   - **Show:**
     - Assigned To Me
     - Assigned To My Selected Groups
     - Assigned To All My Groups
     - Submitted By Me

   - **Filter By:**
     - None
     - Status
     - Territory
     - Status & Territory

   When “Assigned To My Selected Groups” is selected, you will be able to choose one of your groups from My Support Groups.

   When “Status” or “Status & Territory” is selected, you will be able to select option(s) in the Task Status section.

   When “Territory” or “Status & Territory” is selected, you will be able to choose from the Territory drop down list.

2. Click **Search**.

   Records that match the criteria appear in the table in the Task Console.

   - **Reset**
     - Reset the filters back to the default settings

   - **Refresh**
     - Refresh the Task list based on current filter settings
SEARCHING TASKS

1. Click the Search Tasks button at the top of the Task Console.
   The Task (Search) window appears.

2. Enter the criteria into the form field(s).
   - OR -
   Click Advanced search and enter the criteria into the search bar at the bottom of the form.

3. Click Search.
   Records that match the criteria appear in a results pane at the top of the search form.

When you double-click a record in the results pane at the top of the Search window, the Task will open in a separate window.

The percent symbol (%) may be used as a wildcard character.
Syntax Examples for an Advanced Search

<table>
<thead>
<tr>
<th>Search Description</th>
<th>SQL Query</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Tasks created in April 2012 and assigned to Support Staff15:</td>
<td>'Create Date' &gt;= &quot;4/1/2012&quot; AND 'Create Date' &lt;= &quot;4/30/2012&quot; AND 'Assignee+' = &quot;Support Staff15&quot;</td>
</tr>
<tr>
<td>All open Tasks assigned to any eChart group:</td>
<td>'Status*' != &quot;Closed&quot; AND 'Assignee Group+' LIKE &quot;%echart%&quot;</td>
</tr>
<tr>
<td>All Tasks that are in a status of Pending and assigned to either the Infra group or the MS-Citrix group:</td>
<td>'Status*'=&quot;Pending&quot; AND ( 'Assignee Group+&quot;=&quot;Infra&quot; OR 'Assignee Group+&quot;=&quot;MS-Citrix&quot;)</td>
</tr>
</tbody>
</table>

Working with Searches

<table>
<thead>
<tr>
<th>Objective</th>
<th>Instructions</th>
<th>Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear the current search criteria and results</td>
<td>Click the <strong>New search</strong> button.</td>
<td><img src="#" alt="New search" /></td>
</tr>
<tr>
<td>Run a recent search</td>
<td>Select <strong>Searches &gt; Run Recent</strong></td>
<td><img src="#" alt="Searches" /></td>
</tr>
<tr>
<td>Load recently used criteria into the form or search bar</td>
<td>Select <strong>Searches &gt; Load Recent</strong></td>
<td></td>
</tr>
<tr>
<td>Save a search</td>
<td>1. Run the search. 2. Select <strong>Searches &gt; Save Search</strong>. 3. Type a Search Name. 4. Click <strong>OK</strong></td>
<td></td>
</tr>
<tr>
<td>Run a saved search</td>
<td>Select <strong>Searches &gt; Run My Searches</strong>.</td>
<td></td>
</tr>
<tr>
<td>Load saved search criteria into the form or search bar</td>
<td>Select <strong>Searches &gt; Load My Searches</strong>.</td>
<td></td>
</tr>
<tr>
<td>Delete a search</td>
<td>1. Select <strong>Searches &gt; Manage My Searches</strong>. 2. Select the search to be deleted. 3. Click <strong>Delete</strong> and then <strong>Save</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
Remedy Tasks

Export or Print Search Results

To export or print search results:

1. Run the desired search.
2. In the results pane at the top of the Search window, select the records to be exported.

3. Click the Report button at the bottom of the results pane. The Report Console window appears.
5. Type a name into the Name field.
6. Click OK. The Report Console re-appears.
7. Optional: Use the Columns tab to add or remove fields to/from the report.
8. Optional: Use the Sorting and Grouping tab to sort and group the records.
10. Click Export report and/or Print report and follow the prompts to export and/or print the report.

This is a one-time export of data, not a dynamic report that can be refreshed.
Assigning a Task

Creating an Ad Hoc Task

In an Ad Hoc Task, the Task form fields are populated manually.

FROM AN INCIDENT TICKET

To create an Ad Hoc Task from within an Incident ticket:

1. Select **Tasks** from the Links section on the left.

   ![Links](Image)

   *The Incident Tasks window appears.*

2. Select **Ad Hoc** from the Request Type drop down list.

   ![Request Type](Image)

   *The Create Task window appears.*

3. Click the **Relate** button.

   *The Create Task window appears.*

4. Enter the required details into the Task form.

   **Note:** See the “Task Form Fields” section below for a description of these fields.

5. Click **Save**.

   *The Create Task window closes. The Task appears in the Incident Tasks window.*

   ![Tasks](Image)

If you close the Incident before saving it, the Tasks you created do not exist since there is no parent ticket.
FROM A CHANGE TICKET

To create an Ad Hoc Implementation Task from within a Change ticket:

1. Select the **Tasks** tab.
2. Select **Implementation** from the Phase drop down list.

   **Warning**: If Implementation is not selected, your Tasks will not be available during the Implementation stage of your RFC.

3. Ensure **Ad Hoc** is selected in the Request Type field.

4. Click the **Relate** button.
   The Create Task window appears.

5. Enter the required details into the Task form.
   **Note**: See the “Task Form Fields” section below for a description of these fields.

6. Click **Save**.
   The Create Task window closes. The Task appears on the Tasks tab.

   **Warning**: If you close the RFC before saving it, the Tasks you created do not exist since there is no parent ticket.
**TASK FORM FIELDS**

### Main Form

**Task**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name*</td>
<td>Required; Type a descriptive name for the Task</td>
</tr>
<tr>
<td>Summary*</td>
<td>Required; Type a brief description of the Task</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter a detailed description of the Task</td>
</tr>
</tbody>
</table>
**General Tab**

Enter the location where the Task will be performed.

**Requester Tab**

Enter information about the person creating the Task (Requester) and the intended target of the Task (Requested For).

**Classification Tab**

Enter information about the operational and product categorizations for the Task.
### Assignment/Dates Tab

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignee Company</td>
<td>Select the Company, Organization, and Group to which the Task will be assigned</td>
</tr>
<tr>
<td>Assignee Organization</td>
<td></td>
</tr>
<tr>
<td>Assignee Group</td>
<td></td>
</tr>
<tr>
<td>Assignee</td>
<td>IF you have been assigned a specific resource for the Task, select his/her name from the list; otherwise, leave this field blank and the Queue Manager for the Assignee Group will assign a Task Implementer</td>
</tr>
<tr>
<td>Notify Assignee</td>
<td>Select Yes (if necessary)</td>
</tr>
<tr>
<td>Scheduled Start Date</td>
<td>Optional: Enter an estimated start date for the Task</td>
</tr>
<tr>
<td>Scheduled End Date</td>
<td>Optional: Enter an estimated end date for the Task</td>
</tr>
</tbody>
</table>

If the Assignee field is not populated when the Task becomes active, the system-generated notification will not be sent to the Assignee. Ensure names are assigned to each Task early so the Assignee receives notification that he/she can begin working on the Task.

### Relationships Tab

The Relationships tab is not being used at this time.
Using a Task Template

A Task Template may be used to automatically populate certain fields in the Task form. To have a Task Template created, submit your request via the Service Desk.

To create a Task from a Task Template:

1. Follow the steps above for creating an Ad Hoc Task but select **Request Type > Task Template**.

2. Click **Relate**.

   **The Select Template form appears.**

3. Select the template that you want to use and click **Relate**.

   **The new Task appears in the Task list.**

   To filter the list of templates, enter criteria into the top fields (E.g. Assigned Group, Product Name) and click **Search**.
Using a Task Group Template

A Task Group Template generates a Task that has two or more sub-tasks (child Tasks). To have a Task Group Template created, submit your request via the Service Desk.

CREATING A TASK FROM A TASK GROUP TEMPLATE

1. Follow the steps above for creating an Ad Hoc Task but select **Request Type > Task Group Template**.

2. Click on **Task Group Template**. The Select Template form appears.

3. Use the **Type** and/or **Task Category** fields at the top of the form to filter the list of templates.

4. Select the template that you want to use and click **Relate**. The new Task appears in the Task list. The ID starts with TGR.
VIEWING CHILDREN TASKS

Each Child Task within the Task Group must be assigned separately.

To view the child Tasks from an **Incident** or **Change** ticket, double-click the Group Task and select the **Tasks** tab.

In an **Incident** ticket, the child Tasks are also displayed at the bottom of the Incident Tasks window.
In a Change ticket, the child Tasks are also displayed at the bottom of the Tasks tab.

### Modifying a Task

1. Double-click the Task to be modified.

   ![Tasks and Task Groups](image1)

   - ID: TAS000000002157
   - Summary: Sample Task

If you do not see your Task on the Tasks tab in a Change ticket, check that the **Phase** field is set to **Implementation** (for Implementation Tasks).

![Tasks and Task Groups](image2)

The Task opens in the main Remedy window.

![Remedy Task](image3)
2. Make the necessary revisions.

3. Click [Save] at the bottom of the form.

4. Use the Breadcrumb to return to the parent Incident/Change ticket.

**Canceling a Task**

1. Select the Task to be canceled and click [Cancel].

If you do not see your Task on the Tasks tab in a Change ticket, check that the **Phase** field is set to **Implementation** (for Implementation Tasks).

The following message appears.
2. Click **Yes**. The Status of the canceled Task changes to Closed.

<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
<th>Sequence</th>
<th>Status</th>
<th>Assigned Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAS0000000002137</td>
<td>Sample Task</td>
<td>1</td>
<td>Closed</td>
<td>Application-Mgmt</td>
</tr>
<tr>
<td>TGR000000000217</td>
<td>Network/email/Shared drive</td>
<td>2</td>
<td>Staged</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** If a Task Group has been canceled, all Tasks within the Group will be Closed.

**Sequencing Tasks**

**OVERVIEW OF TASK SEQUENCING**

When you relate Tasks or Task Groups to an Incident or Change, they are automatically sequenced in the order in which you related them to the parent ticket. This sequence is strictly enforced; meaning that Task 1 must be closed before Task 2 can be completed, Task 2 must be closed before Task 3 can be completed, etc.

<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
<th>Sequence</th>
<th>Status</th>
<th>Assigned Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAS0000000002128</td>
<td>Order for Incident 4235</td>
<td>1</td>
<td>Assigned</td>
<td>Application-Mgmt</td>
</tr>
<tr>
<td>TAS0000000002129</td>
<td>Receive PO for incident 4235</td>
<td>2</td>
<td>Staged</td>
<td></td>
</tr>
<tr>
<td>TAS0000000002148</td>
<td>Install item per incident 4235</td>
<td>3</td>
<td>Staged</td>
<td></td>
</tr>
</tbody>
</table>

You can, however, reassign the sequence in which Tasks and Task Groups are performed. You can also assign the same sequence number to more than one Task or children Tasks of a Task Group. If two Tasks or children Tasks of a Task Group have the same sequence number, they are considered peers. You can work on peer Tasks in any order.

<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
<th>Sequence</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAS0000000002142</td>
<td>Create VM</td>
<td>1</td>
<td>Staged</td>
</tr>
<tr>
<td>TAS0000000002143</td>
<td>Assign server names; update server name list; create server</td>
<td>1</td>
<td>Staged</td>
</tr>
<tr>
<td>TAS0000000002144</td>
<td>Update SCCM monitoring tool; update As Built if req</td>
<td>1</td>
<td>Staged</td>
</tr>
<tr>
<td>TAS0000000002145</td>
<td>Configure firewall; update As Built if req</td>
<td>1</td>
<td>Staged</td>
</tr>
<tr>
<td>TAS0000000002146</td>
<td>Assign IP; configure switches; update As Built if req</td>
<td>2</td>
<td>Staged</td>
</tr>
<tr>
<td>TAS0000000002147</td>
<td>Install &amp; configure OS and extra software packages</td>
<td>2</td>
<td>Staged</td>
</tr>
</tbody>
</table>

Peer Tasks
REASSIGNING TASK SEQUENCE NUMBERS

Tasks can only be rearranged while in a Status of Staged. It’s imperative to do any Task re-sequencing or canceling BEFORE:

- An Incident (Service Request) ticket moves to a Status of In Progress
- A Change ticket moves to a Status of Implementation in Progress

To reassign a Task sequence number:
1. Select the Task to be moved.
2. Click the **up arrow** or the **down arrow** next to the table.

From an Incident:

<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
<th>Sequence</th>
<th>Status</th>
<th>Assigned Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>TASS00000002151</td>
<td>Sample Task</td>
<td>1</td>
<td>Staged</td>
<td>Application-Mgmt</td>
</tr>
<tr>
<td>TASS00000002152</td>
<td>Test Task</td>
<td>2</td>
<td>Staged</td>
<td>Application-Mgmt</td>
</tr>
<tr>
<td>TASS00000002153</td>
<td>Testing Task</td>
<td>3</td>
<td>Staged</td>
<td>Application-Mgmt</td>
</tr>
</tbody>
</table>

From an RFC:

<table>
<thead>
<tr>
<th>ID</th>
<th>Summary</th>
<th>Sequence</th>
<th>Status</th>
<th>Assigned Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>TASS00000002142</td>
<td>Create VM</td>
<td>1</td>
<td>Staged</td>
<td>MS-Citrix</td>
</tr>
<tr>
<td>TASS00000002143</td>
<td>Assign server names; update server name list; creat</td>
<td>2</td>
<td>Staged</td>
<td>MS-Citrix</td>
</tr>
<tr>
<td>TASS00000002144</td>
<td>Update SCON monitoring tool; update As Built phase</td>
<td>3</td>
<td>Staged</td>
<td>Infra</td>
</tr>
<tr>
<td>TASS00000002145</td>
<td>Configure firewall; update As Built phase</td>
<td>4</td>
<td>Staged</td>
<td>Network</td>
</tr>
</tbody>
</table>

The selected Task moves either higher or lower in the sequence.

**Note:** Only the selected Task will be renumbered. All other Tasks retain their same sequence number.

To avoid delays in workflow, ensure that any Tasks that can be done simultaneously have the same sequence number (peer Tasks).
SEQUENCING AND CANCELED TASKS

From within an **Incident** ticket, any Staged Tasks below a canceled Task can only move **up** to the canceled sequence level (level 3 in the image below). They cannot move above this level as the canceled Task sequence becomes locked.

![Tasks and Task Groups Table](image)

If Tasks above a canceled Task are still in a Status of Staged, you can move them down to the number that matches the Task below the canceled one.

![Tasks and Task Groups Table](image)

![Tasks and Task Groups Table](image)

**Note:** Tasks within a Change ticket may be moved above or below a canceled Task.

**Move the unwanted Task up to the top of the list and THEN cancel it. This allows you to move the Task below up to sequence 1 since the Closed sequence is locked at 1.**
Activating a Task

The Task Assignee will not be able to complete his/her Task until it moves to a Status of ASSIGNED. To initiate this, move the Status of the parent:

- INCIDENT (Service Request) ticket to IN PROGRESS
- CHANGE ticket to IMPLEMENTATION IN PROGRESS

Tasks can only be rearranged while in a Status of Staged. Be sure to do any Task re-sequencing or canceling BEFORE activating the Task.

See “Task Statuses” on page 5 for a description of each Status.

*If the Assignee field has not yet been populated in the Task form, the Status will be Pending.

**For a Task created in the Implementation Phase.
The Status of the 1st Task is determined by the Status of the parent Incident/Change ticket. The Status of subsequent Tasks is determined by the Status of the previous Task(s) in the sequence order.

The 1st Task will move to Assigned when Incident Status = In Progress or Change Status = Implementation in Progress

This Task will move to Assigned when Task 1 is Closed

This Task will move to Assigned when Task 2 is Closed

The Task Assignee does not receive the system generated notification until the Task Status = Assigned. It is the responsibility of the owner of the parent Incident/Change ticket to make sure all Task Assignees are informed of the work they are expected to perform. This is especially important for Implementation Tasks in Change tickets.
Receiving a Task

Starting a Task

1. Open the Task from your Overview or Task Console.
2. Select **Status > Work in Progress**.

3. Click **Save** at the bottom of the Task form.

*The Actual Start Date is populated on the Dates tab.*

Updating a Task

**ADDING AN ATTACHMENT**

Click **+** to add a document or click **🔗** to add a web link. The maximum file size per attachment is 2 MB.
ADD A NOTE

1. Select the **Work Info** tab.

2. Select a **Work Info Type** that corresponds with the type of note you are adding.

3. Type your note into the **Work Info Notes** field.

4. Click **Save** at the bottom of the Task form.

   *The note appears in the Work Info History table.*

---

The content in the **Notes** field (at the top of the Task form) is searchable.
### Closing a Task

Tasks can be edited in a Status of Staged, but they cannot be closed until Status = Assigned or Work in Progress.

To close a Task:

1. Open the Task to be closed.
2. Ensure all relevant notes and attachments have been added to the Task.
3. Select the **Dates** tab and enter the **Actual Start Date** for the Task (if not already populated).
4. Select **Status > Closed**.
5. Click **Save** at the bottom of the Task form.

*The Actual End Date is populated and the Task is closed.*

```plaintext
<table>
<thead>
<tr>
<th>Task ID</th>
<th>TAS00000000000012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type*</td>
<td>Manual</td>
</tr>
<tr>
<td>Actual Start Date</td>
<td>2/22/2012 8:45 AM</td>
</tr>
<tr>
<td>Status*</td>
<td>Closed</td>
</tr>
<tr>
<td>Actual End Date</td>
<td>2/22/2012 9:33 AM</td>
</tr>
</tbody>
</table>
```

**Warning:**

Actual Start and End Dates MUST be entered in the Task in order to close it. If you change the Status to Closed and Save the Task without entering the Actual Start Date first, you will receive the following error message.

*The Actual Start Date and Actual End Date are required when closing a task. Please provide the Actual Dates before proceeding.* [ERRR 45145]
References

Manitoba eHealth Documents

To view the Manitoba eHealth Process Documents or Remedy Training Material, log into Remedy and select the Document Viewer.

RELATED PROCESS DOCUMENTS

- Incident_Mgmt Process Guide
- Incident_Mgmt Process Principle Guide
- Change_Mgmt Process Guide
- Change_Mgmt Process Principle Guide

BMC Remedy Help

For further information on working with Tasks from within an Incident ticket, please refer to Creating and monitoring tasks in the BMC Remedy Incident Management Help.

For further information on working with Tasks from within a Change ticket, please refer to the following topics in the BMC Remedy Change Management Help.

- Change coordinator role > Implement stage - Working with tasks
- Task implementer role