



# Managing Work Assignments

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Service Manager module allows service teams to review, administer, and track service requests and their associated delivery tasks. Service Manager is a work management tool that allows service team members to:

- 1 View and complete work assignments
- 2 Forecast and manage their work load
- 3 Assign work to other members of the team
- 4 Track time spent on service requests and billable rate
- 5 Monitor and manage the service delivery process

Users of Service Manager include:

- Service Performers, see [Performing Work](#)
- Service Team Managers, see [Managing Service Team](#)
- Service reviewer, see [Reviewing Tasks](#)
- Authorizers, see [Authorizing Tasks](#)
- Overall delivery plan managers, or Project Managers, see [Managing a Project](#)

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## Delivery Process

Delivery process is a set of system defined tasks to complete a service request. When a delivery process begins, all tasks in the [Delivery Plan](#) are created:

- A Delivery Plan can comprise of both sequential tasks and concurrent tasks.
- An Ongoing [task](#) is one that has begun.
- A New Task is one that has been created, but is dependent upon the completion of a previous task before it can begin.
- A Complete Task is one that has been submitted as Done by a Service [Performer](#).

When performing work, a Service Performer:

- Logs into Service Manager.
- Browses and chooses the task to complete.
- Performs the task.
- Submits the task as complete.

## Fulfillment Management Roles

### Roles

A role combines: access to a module with one or more capabilities, and in some cases, one or more object-level permissions.


A Capability provides the means to perform certain functions within a module. For example: Browse for Services (in My Services).

A Permission grants rights to act upon an object. For example: Order for Others (of a person or OU).

Roles are organized using a hierarchical structure of containers, much like folders. This structure allows for parent-child relationships between roles, in which child roles inherit the capabilities, permissions, and members from parent roles.

### System-Defined Roles

Organization Designer module provides a large number of predefined roles for your use. These roles reflect the majority of use cases an average company may require for each of their users. Therefore, in general, these predefined roles should be suitable for the majority of roles needed. If you need additional roles, you can create a new role or better yet copy an existing role and modify it to meet your needs.

In the Organization Designer user interface, system-defined roles are marked with a .

The system-defined roles affecting the Service Manager module are grouped in the following hierarchy:

**Table 1: Types of Roles**

Request Fulfillment Roles	Roles supporting the ITIL process of Request Fulfillment, with the Solution Area of Service Operations, including Request Self-Service, Request Governance, and the management and automation of fulfillment activities.	
	<b>Subcontainers</b>	<b>Description</b>
	Fulfillment Automation Roles	Roles supporting the automation of service request fulfillment and delivery.
	Fulfillment Management Roles	Roles supporting the fulfillment of service requests.
	Request Governance Roles	Roles supporting the governance of service requests.
	Request Self-Service Roles	Roles supporting the initiation and tracking of service requests.

**Fulfillment Management Roles**

**Table 2: Roles and Capabilities**

Role	Description / Capabilities
Service Manager	<ul style="list-style-type: none"> <li>• <b>Perform Work</b>-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor.</li> <li>• <b>Manage Work</b>-Grants the Service Team view; allows user to assign work, set task priorities, reschedule task due dates.</li> <li>• <b>Create Ad-Hoc Tasks</b>-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks.</li> </ul> <p><b>Note</b> This role is used solely in migration of personnel from previous versions of Request Center. In Request Center 2007, it was referred as the Service Team Manager role.</p>
Service Performer	<ul style="list-style-type: none"> <li>• <b>Perform Work</b>-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor.</li> <li>• <b>Create Ad-Hoc Tasks</b>-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks.</li> </ul> <p>For more information, see <a href="#">Managing Work</a>, on page 28.</p>

Service Team Administrator	<ul style="list-style-type: none"> <li>• <b>Search All Performers</b>-Allows the user to search for all performers in the system from the search box in the navigation pane.</li> <li>• <b>Perform Work</b>-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor.</li> <li>• <b>Manage Work</b>-Grants the Service Team view; allows user to assign work, set task priorities, reschedule task due dates.</li> <li>• <b>Create Ad-Hoc Tasks</b>-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks.</li> <li>• <b>Perform Global Delivery Search</b>-Allows the user to search for all tasks and requisitions within the system, not just the ones assigned to the user.</li> </ul>
Service Team Manager	<ul style="list-style-type: none"> <li>• <b>Search All Performers</b>-Allows the user to search for all performers in the system from the search box in the navigation pane.</li> <li>• <b>Perform Work</b>-Grants the standard Service Manager views; allows user to check in/out tasks, complete tasks, and cancel tasks for which they are the task supervisor.</li> <li>• <b>Manage Work</b>-Grants the Service Team view; allows user to assign work, set task priorities, reschedule task due dates.</li> <li>• <b>Create Ad-Hoc Tasks</b>-Grants access to the Ad-Hoc Task link and the ability to create Ad-Hoc tasks.</li> </ul>

## Understanding Requisitions

Requisitions are the forms on which service requests are drawn up. When a service is requested within My Services, a requisition is created. Requisitions contain information on who created the request, who will receive the service, and general information about the service being requested.

The hierarchical structure of requisitions to tasks is as follows:

- Requisitions.
- Requisitions contain service requests.
- Service requests are composed of several tasks required to complete the request.

### Viewing Requisition Information

Within Service Manager, you can view requisition information by using the Requisitions view.

To view requisition information:

- Under My Views of the Navigation Pane, click **Requisitions**.
- In the Data Pane, click the requisition number for the requisition you wish to view.

## Understanding Tasks and Task Status

A task is a defined piece of work that is considered as one step in [Delivery Process](#). A task is performed by a member of a service team, and is performed in order to complete the delivery of the service.

There are several types of tasks within Service Manager:

### Types of Tasks

<b>Ad-Hoc</b>	A new task being created by the performer while executing tasks in a predefined process, such as pricing, authorization, and service delivery.
<b>Authorization</b>	Task that requires the performer to allow a request for service or product to move forward. Lack of authorization stops the delivery process.
<b>Review</b>	Concurrent task that requires the performer to review and approve a step in the delivery process. Until the performer approves the step, the delivery process is placed on hold.
<b>Delivery Task</b>	Activity assigned to an entity that is a step in the delivery plan and has a due date.
<b>External Authorization</b>	Authorization task delegated to a system other than Prime Service Catalog.
<b>External Review</b>	Review task delegated to a system other than Prime Service Catalog.
<b>External Task</b>	Delivery task delegated to a system other than Prime Service Catalog; for example, help desk or financial systems. It has a due date and can be terminated.
<b>Monitor Delivery Task</b>	Task assigned to the Service Manager role of <b>project manager</b> that allows the manager to view the entire delivery process. It allows the manager to assign and reassign tasks, cancel the delivery process, and declare the process closed.
<b>Pricing</b>	Optional task created by Prime Service Catalog when pricing for a service is configured as "pricing required". Pricing task precedes any authorization or review task, and the action taken is to enter a price and click <b>Assign Price</b> .

### Defining Task Status

Task status is the current state of the task. The following are statuses a task may be assigned during the delivery process:

#### Task Status

<b>New</b>	Created task within the delivery process. Task is not initiated until preceding Ongoing tasks are completed.
<b>Ongoing</b>	Task that is currently active.

<b>Waiting</b>	Ongoing task that is placed on hold if an Ad-Hoc task is created that precedes the ongoing task. The ongoing task is changed to Waiting, until the Ad-Hoc task is completed.
<b>Cancelled</b>	During the delivery process, if the initiator or customer of an order cancels the order, all tasks not complete change to the Cancelled Task status. In addition, if an Ad-Hoc task is not complete once the delivery process is complete, the Ad-Hoc task changes to the Cancelled Task status, and no longer requires completion.
<b>Being Reviewed</b>	Status assigned to an ongoing review task.
<b>Reviewed</b>	Status for a task that has been reviewed and approved.
<b>Completed</b>	Status for a task that has been completed.
<b>Skipped</b>	Task that is deemed unnecessary (for example, by a branching workflow), and therefore not performed.
<b>Authorized</b>	Task that has been approved by the financial or organizational unit responsible for the service.
<b>Being Approved</b>	Status for a task that is in the process of being approved by a service group.
<b>Approved</b>	Status for a task that is approved by a service group.
<b>Rejected</b>	Status of an authorization task where the authorizer rejects the service request.

## Understanding Due Dates

Due Date is the date and time an individual task, or an entire delivery plan, should be complete. This date is determined using the durations agreed upon in the Service Level Agreement or Operating Level Agreements used in configuring the service.

The date and time is calculated based on the performer's work day, and is displayed according to the specified time zone of the performer.

Due dates are calculated at the time the requisition is submitted, and then **recalculated** once all authorizations, if any, are completed. Once this recalculation is made, the due date no longer undergoes recalculation.

### Example:

A Service Level Agreement stipulates that a particular service has three tasks:

- One authorization task - Duration for the authorization task is up to 8 business hours to complete.
- Two delivery tasks - Durations for each delivery task is up to 8 business hours to complete, totalling 16 hours.

Therefore, once the service request is submitted, the due date calculates based on a duration of 24 business hours to complete: 8 hours for the authorization and 16 hours for the delivery tasks.

The performer assigned to the authorization task only works 4 hours per day. Based on this and the 8 hour duration allowed for authorization, the due date would be 2 days after the scheduled start date and time.

Once the authorization task is complete, then the due date is recalculated. Due date is no longer based on 24 hours, but rather only 16 hours, the number of hours for delivery after all authorizations are complete.

## Understanding Queues

Queues are lists of tasks to be completed. Queues act as a repository for tasks organized by similar function, and are set up and managed in Organization Designer.

Queues are useful because they allow any person with rights to the queue to have access to the tasks. This prevents a task from being dependent on any one individual.

A service performer or manager can view a list of queues in which they perform work by expanding the list in the Navigation Pane. An individual's view of queues in Service Manager is governed by their [Fulfillment Management Roles](#).

## Using the Action Buttons

Various action buttons are available when using Service Manager, depending on your role:

### Action Buttons in Service Manager

<b>Approve</b>	Used in departmental authorizations, <a href="#">service group</a> authorizations, and financial authorizations. It is used to approve a requisition or service request. Clicking it results in the continuation of the delivery process.
<b>Cancel</b>	If this option is configured, allows a Task Supervisor to cancel a delivery task. After this action, service delivery proceeds as normal.
<b>Cancel Plan</b>	Used by Project Managers of a service delivery plan to cancel delivery of a service request during the delivery process phase. Delivery of the service request does not continue when this action is taken.
<b>Check In</b>	Moves a task from an individual's work list to the work queue to which it was previously assigned.
<b>Check Out</b>	Moves a task from a work queue to an individual's work list.
<b>Done</b>	Completes a service delivery task or an Ad-Hoc task.
<b>OK</b>	Used for departmental reviews and service group reviews.
<b>Reject</b>	Used in departmental authorizations, service group authorizations, and financial authorizations. The service request is rejected and delivery ceases to continue.
<b>Reject Selected</b>	Displays for departmental authorizations and financial authorizations where there is more than one service request associated with the requisition.
<b>Reschedule</b>	Used by Service Team Managers or Project Managers to reschedule the due date for a task in a delivery plan.
<b>Skip</b>	If configured, used by a task supervisor to skip a delivery task that has not started. Service delivery proceeds as planned, with the exception of the skipped task.

# Searching, Filtering, and Creating Views

The default view that is displayed when you log in to Service Manager module and search facilities are governed by the interaction of:

- Role, see [Fulfillment Management Roles](#)
- Queue Access, [Understanding Queues](#)
- Permissions
- OU Membership
- Transaction Status

Based on these settings and assignments, Service Manager allows you to search for various tasks and requisitions having a particular status, and for various people, queues, and/or service teams.

## Search Methods

There are three search methods in Service Manager:

- Navigation Pane search - Searches for queues, performers, or service teams.
- Task Pane search - Searches for tasks.
- Filter and search - Filters the current data pane view, search for tasks using multiple criteria, and create views.

## Global Search

When conducting a normal search, results that display reflect those tasks that you have been granted permission to view. On the other hand, you may have been given permission to search for all tasks within the system that fit the search criteria, not just the ones you are allowed to see. This permission is granted using Organization Designer by your administrator, therefore check with your administrator for assistance.

If granted this permission, a Global Search check box displays next to the [Conducting Task Pane Search](#), and when conducting a [Searching, Filtering, and Creating Views](#).

This allows you to either search only those tasks that you have been given permission to view, or click **Global Search** to view all tasks within the system that meet your search criteria.

## Conducting Task Pane Search

The Task Pane Search enables you to locate tasks based upon your search criteria and status criteria.

The search criteria and status criteria available to you are determined by the Service Manager view in which you begin your search.

Task Pane Search

Service Manager View	Search Criteria	Status Criteria
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<ul style="list-style-type: none"> <li>• <a href="#">Available Work</a></li> <li>• <a href="#">My Work</a></li> <li>• <a href="#">My Late Work</a></li> <li>• <a href="#">Work Forecasts</a></li> </ul>	<ul style="list-style-type: none"> <li>• Flag</li> <li>• Priority</li> <li>• Attachment</li> <li>• Requisition</li> <li>• Due Date</li> <li>• Task Name</li> <li>• Service Name</li> <li>• Initiator</li> <li>• Customer OU</li> <li>• Customer Name</li> <li>• Performer</li> <li>• Queue</li> <li>• Schedule Start Date</li> <li>• Effort</li> <li>• Task Type</li> </ul>	<ul style="list-style-type: none"> <li>• New</li> <li>• Ongoing</li> <li>• Cancelled</li> <li>• Under review</li> <li>• Completed</li> <li>• Skipped</li> <li>• Authorized</li> <li>• Being approved</li> <li>• Approved</li> <li>• Rejected</li> <li>• Reviewed</li> <li>• All New - Finds all that are in any of the following statuses: New, Ongoing (Waiting), and Scheduled.</li> <li>• All Ongoing - Finds all that are in any of the following statuses: Ongoing, Under Review, and Being Approved.</li> <li>• All Closed - Finds all that are in any of the following statuses: Completed, Cancelled, Rejected, Skipped, Approved, and Reviewed.</li> <li>• All Tasks - Finds all tasks regardless of status.</li> </ul>
<p>Requisitions</p>	<ul style="list-style-type: none"> <li>• Requisition</li> <li>• Submit Date</li> <li>• Service Name</li> <li>• Initiator</li> <li>• Customer OU</li> <li>• Customer</li> <li>• Expected Duration</li> <li>• Current Cost</li> <li>• Created Date</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing</li> <li>• Cancelled</li> <li>• Closed</li> <li>• Rejected</li> <li>• Delivery Cancelled</li> </ul>

To search retrieved tasks:

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- Step 1** On the Home page, choose a search criteria from the Task Search drop-down list.
- Step 2** Specify associated search criteria in the field that appears after you choose an initial criteria.
- Step 3** Choose a status criteria from the Status drop-down list.
- Step 4** Click **Search**.  
Search results appear in the Data Pane.
- 




**Note**

If you search for tasks associated with a flag of a specific color, and the search results yield a task associated with a flag of a different color, that is because the status of the task has changed from that associated with the specified flag to that of the different flag. For example, a blue flag task may appear as a red flag task if the task has changed to a late status.

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## Sorting by Column Heading

You can quickly sort the current task information displayed in the Data Pane by column heading, in either ascending or descending order, by clicking the sort arrow for that column.

An ascending or descending arrowhead signifies that the column is being sorted accordingly, while  signifies that the column is currently not sorted.

## Filtering and Searching

Filter and Search is a powerful tool that enables you to expand your search for a task or requisition beyond the limitations of the basic [Conducting Task Pane Search](#).

Using Filter and Search you can:

- Show and hide columns
- Set filters using Boolean expressions
- Apply your settings to search in the current view
- Save your settings as a new view

To effectively use Filter and Search, you must have a basic understanding of the following concepts:

- The difference between a [task](#) and a [requisition](#).
- The difference between a [customer](#) and an [initiator](#).
- The lifecycle of tasks and requisitions, and the status which can be associated with each, such as New, Being Approved, Ongoing, Cancelled, Completed, and so on.

- The task types for which you are responsible, such as Monitor Task, Authorization Task, Delivery Task, External Task, and so on.

## Searching for a Task

You can search for a particular task using Filter and Search from any of the task-based views.



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**Note** You cannot search for a task from the requisitions view.

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- You can use one or more of the filters, in any set of combinations, which are available to you in the Filter and Search window.
- There are no restrictions imposed on the basis of permissions or task status. You can, therefore, locate a task for which you are unable to perform work.
- The ability to locate a task does not change any of the permissions, including dictionary permissions, associated with that task.

To search for a particular task using filter and search:

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- Step 1** On the home page, click the view name associated to the tasks you wish to view.
- Step 2** Click **Filter and Search**.
- Step 3** Choose your search and filter criteria. See [Filter and Search Criteria](#).
- Step 4** If you wish to save your criteria, type a new view name in the **Save view as** field, and then click **Save**.
- Step 5** Otherwise, once you complete all your selections, click **Apply Now**.
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## Searching for a Requisition

You can search for a particular requisition using Filter and Search only from the Requisitions view.



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**Note** Requisitions contain a limited amount of information which is generally not useful to a typical service performer.

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To search for a particular requisition using Filter and Search:

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- Step 1** Under My Views of the home page, click the **Requisitions** view.
- Step 2** Click **Filter and Search**.
- Step 3** Choose your search and filter criteria. See [Filter and Search Criteria](#).
- Step 4** If you wish to [Saving a View](#), type a new view name in the Save view as field, and then click **Save**.
- Step 5** Otherwise, once you complete all your selections, click **Apply Now**.
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## Creating Views

Filter and Search enables you to create, save, and manage personalized views. A Personalized View is a collection of search filters and other settings which you choose using Filter and Search, and then save to be reused any time you return to Service Manager.

Tips to remember:

- You can filter the standard views while you are using them, but your filter settings are not retained once you leave that view.
- You cannot permanently modify any of the standard views, such as [My Work](#), [Available Work](#), and so on.
- You can name, and save as a personalized view, any collection of filter settings you create.
- A personalized view is available to you, and only you, any time you return to Service Manager.
- Only you can modify or delete your personalized views.
- You cannot choose a personalized view as the default Service Manager view in your Preferences. Only a standard view can be chosen as the default view.
- You can neither share a personalized view with another user, nor publish it in any way.
- Only the site administrator can create new views and make them public.
- There is no way for the site administrator to selectively make a view public. Public views are visible to 100% of Service Manager users.
- You cannot hide a public view.

## Filter and Search Criteria

There are several variables you can use while [Searching for a Task](#) or [Searching for a Requisition](#) using Filter and Search:

Task	Description
Filtering Column Data	Enter the desired filter information in the Filter column.
Rows Displayed	You can choose the maximum number of rows displayed in any view.
Choosing Columns	You can choose which columns are displayed in any view.

Task	Description
Moving Columns	<p>You can change the order in which columns are displayed in any view.</p> <ol style="list-style-type: none"> <li>1 Choose a column by clicking on the column name. The shading of the column changes when it has been selected.</li> <li>2 Click the Up or Down arrow to move the column in the display.</li> </ol>
Ascending/Descending Order	You can set the display of information in a view either by Ascending or Descending order for a particular column.
Grouping	<p>You can group the display of information based on a single column.</p> <p>Results in the task pane displaying dues date sorted in ascending, and grouped within due date by service name.</p>

## Saving a View

Filter and Search allows you to create custom views for searches you conduct frequently. These views appear on the Navigation Pane under My Views. Custom views appear in *italics*.

To save a view:

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- Step 1** On navigation pane, click the view name associated to the tasks you wish to view.
  - Step 2** Click **Filter and Search**.
  - Step 3** Choose your search and filter criteria. See [Filter and Search Criteria](#).
  - Step 4** In the Save view as field, type a new view name, and then click **Save**.
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## Deleting a View

Custom views created are displayed under My Views of the Navigation Pane. These views appear in italics.

To delete a custom view:

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- Step 1** Under My Views of the navigation pane, click the view name to open the view you wish to delete.
  - Step 2** Click **Filter and Search**.
  - Step 3** In the lower left of the Filter and Search Criteria window, click **Delete This View**.
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## Performing Work

Work is performed by a Service Performer. A Service Performer is a staff member within a delivery organization that is responsible for performing work, and thus completing tasks within a delivery plan. An example of a service performer can be a member of an IT department who is in charge of all hardware inventory, and so on.

Within Service Manager, a Service Performer can:

- Browse through a list of work tasks for that particular performer. See [Browsing Work](#).
- Check out work in order to track work information while performing the task. See [Checking Out Work](#).
- Check work in to mark the work task as complete. See [Checking In Incomplete Work](#).
- Print task information. See [Printing Tasks](#).
- Use My Calendar to add task deadlines to Microsoft Outlook. See [Using My Calendar](#).

## Browsing Work

The Navigation Pane in the Service Manager home page allows:

- Service performers to view and manage their own work.
- Service managers to manage their team's assigned tasks, and assign or reassign workload, as needed.

There are several default views available in Service Manager.

Default Views in Service Manager

Default Views	Description
<a href="#">Available Work</a>	Displays ongoing tasks assigned to your queues.
<a href="#">My Work</a>	Displays ongoing tasks that you have checked out of available work, and ongoing tasks that have been assigned specifically to you.
<a href="#">My Late Work</a>	Displays ongoing tasks that have not been completed by their due date.
<a href="#">Work Forecasts</a>	Displays new tasks assigned specifically to you. These tasks have not yet started; therefore they are not yet ongoing.
Recent Requisitions	Lists all requisitions for which you have performed work.
<a href="#">Historical Requisitions</a>	Helps in migrating the completed requisitions like: "Closed", "Canceled", "Delivery Canceled" or "Rejected" status to historical transaction tables.
All Queues	Displays all queues in which you perform work.
Service Teams	A management view, displaying all service teams and members you manage.

You can create custom views to appear in the Navigation Pane. Default views appear in regular font, while custom views you create appear in italics. For more information on creating custom views, see [Creating Views](#).

To view tasks:

- 1 Expand the desired list in the Navigation Pane.
- 2 Click the **view name** to display those requisitions associated with the tasks.

You can quickly find your work by clicking My Work in the Navigation Pane's My Views list.

## Opening a Task

There are several ways to open tasks. You can:

- Open a single task
- Open multiple tasks

Once open, you can view all task information. If you wish to perform the work for this task, you must check out the task once it is open. This prevents multiple performers from completing the same task. You can then enter necessary information and mark your work as done.

### Opening a Single Task

To open a single task:

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- Step 1** Browse to view a list of tasks. See [Browsing Work](#).
- Step 2** In the Data Pane, click the requisition number of the task.
- Note** Clicking the service name or task name link displays the associated task's information in the preview pane, but does not open the task.
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### Opening Multiple Tasks

Opening multiple tasks to work, opens the tasks as tabs and you can work on them one after the other. To open multiple tasks:

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- Step 1** Browse to view a list of tasks. See [Browsing Work](#).
- Step 2** In the Data Pane, check the check box next to tasks you wish to open.
- Note** You can also open a single task by placing a check mark in a single check box.
- Step 3** Click **Open** to open the tasks.
- Step 4** To navigate between tasks, click the associated number on the navigation bar. Numbers are assigned to tasks based on where the tasks appear on the Data Pane. Tasks listed first appear first, and so forth.
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## Working With Tasks

Performing work consists of opening a task, checking it out, executing the work while entering necessary task data within Service Manager.

The following list is a typical sequence of tasks performed by a Service Performer to execute the work and bring it to completion.

- 1 Open your checked out task. See [Checking Out Work](#), and [Opening a Task](#).
- 2 View the task details which provide high-level information for a task. See [Viewing Task Details](#).
- 3 View the task data to review the order form information provided by the customer, and update the data, if required. See [Viewing and Editing Task Data](#).
- 4 Mark the completed activities in the checklist before you can mark the task as complete. See [Completing Checklist Items](#).
- 5 View all tasks in the delivery process and edit the necessary details. See [Viewing and Editing Delivery Process](#).
- 6 Add comments and additional information to the task. See [Adding Comments to a Task](#).
- 7 Add attachments to the task, if any. See [Adding Attachments to a Task](#).
- 8 Create Ad-Hoc tasks, if necessary. See [Viewing and Creating Ad-Hoc Tasks](#).
- 9 Enter the billable hours and information for work effort. See [Tracking Work Effort](#).
- 10 Complete the work. See [Completing Work](#).

### Checking Out Work

Before you perform a task, you must check out the task. The check out step is important because it prevents multiple performers from completing the same task. Checking out the task moves the task to your My Work. To check out work:

- 
- Step 1** Browse to view a list of tasks. See [Browsing Work](#).
- Step 2** In the Data Pane, check the check box next to the task you wish to open.
- Step 3** Use one of the following methods to check out the task:
- Click **Open** to open the task, and then click **Check Out**.
  - Click the arrow on the **More Actions** box, and then choose **Check Out**.
-



## Opening a Checked Out Work

Review the task that has to be performed by opening the task and viewing all the details of the task. To open checked out work:

**Step 1** Under My Views of the Navigation Pane, click the view name of the checked out task. For example, if you only check out work, the task will appear in your My Work view.

**Step 2** In the Data Pane, check the check box next to the task you checked out.

**Step 3** Click **Open** to open the task.  
You can now view the task's navigation links:  
Task Information

<a href="#">Viewing Task Details</a>	Displays all information about the task, including its scheduled start date, requisition details, pricing, and standard duration.
<a href="#">Viewing and Editing Task Data</a>	Displays the order form data provided by the customer, as well as any data fields used by service performers.
<a href="#">Delivery Process</a>	Displays detailed information about each task in the delivery process.
<a href="#">Adding Comments to a Task</a>	Displays user comments added by any user, system history, and allows you to add comments.
<a href="#">Adding Attachments to a Task</a>	View and add attachments.
<a href="#">Viewing and Creating Ad-Hoc Tasks</a>	Create Ad-Hoc tasks.
<a href="#">Completing Checklist Items *</a>	Displays checklist items, if any.
<a href="#">Tracking Work Effort*</a>	Enter detailed time-on-task information, and other measures of task cost.
<a href="#">Viewing Task Instructions *</a>	Displays additional task information, if any.

\* These attributes appear if configured for the current task.

## Viewing Task Details

Task Details provides high-level information for a task. To view task details:

**Step 1** Open the task for which you wish to view details. See [Opening a Task](#).

**Step 2** Click **Task Details**.

**Step 3** The Task Details page contains the following fields:

<b>Task Details</b>	Name	Name of the service task.
	Due on	Calculated due date for the particular task.
<b>Requisition</b>	Requisition Number	Click to open the Requisition Status page.
	Customer	Click to display the customer's profile.
	Customer E-Mail	Click to send an email to the customer.
	Customer Work Phone	Work phone number of the customer.
	Bill To	Click to display the customer's organizational unit information.
	Status	Requisition status.
	Initiator	Click to display the initiator's profile information.
	Created Date	Date on which the requisition was created.
	Submit Date	Date on which the requisition was submitted. Submit date may be different than create date if the requisition was initiated, but was not submitted until a later time.
	Closed Date	Completion date for the requisition.
<b>Task Information</b>	Performer	Click to display associated user or queue profile.
	Priority	Choose high, normal, or low priority.
	Scheduled Start	Calculated start time for the task, based on the service agreement.
	Due on	Calculated due date for the task, based on service agreement.
	Status	Current task status.
	Follow Up	Choose the appropriate flag for the task.
	Started On	Actual start date.
	Completed On	Actual completion date.
<b>Services</b>	Name	Click to display the task data page for this task.
	Entitlement	Indication of whether or not the service requires authorization.
	Status	Current status for the service request.
	Standard Duration	Calculated duration for the service request, based on the service agreement.
	Quantity	Number of requests of this particular service associated with this requisition.

	Unit Cost	Cost for the service.
	Subtotal	Calculated cost of service based on quantity purchased.

### Assigning a Flag to a Task

You can assign flags of different colors to a [task](#). The flag appears next to the requisition in the Data Pane, and can be a means of highlighting tasks requiring varying degrees of attention or follow-up. To add a custom flag to a task:

- Step 1** Open a task for which you wish to associate a flag. See [Opening a Task](#).
- Step 2** Click **Task Details**.
- Step 3** Choose the desired flag color from the Follow Up box.
  - Note**
    - Clear Task removes the flag from the task.
    - You cannot change a red flag that represents a late task (past the due date).
- Step 4** Click **Close** to close the Task Details page.
- Step 5** Click **Refresh** or **Open** the task to see the change.

The task list displays the flag and the Task Data page displays the chosen flag next to the due on information.

### Viewing and Editing Task Data

Task Data displays order form information provided by the customer, as well as editable fields for service performers to enter task based data.

- Step 1** Check out and open the task you wish to enter task based data. See [Checking Out Work](#) and [Opening a Task](#).
- Step 2** Click **Task Data**.  
The Task Data page contains the following fields:

Task Data Details		
<b>Task Details</b>	Name	Name of the task.
	Due On	Calculated due date for the task, based on the service level agreement. See <a href="#">Understanding Due Dates</a> .
<b>Service Information</b>	Requisition Number	Requisition number associated with the task.

	Customer	Click to display customer information.
	Quantity	The number of units.
	Price Per Unit	Price for the service.
	Status	Current status of the service.
	Due On	Calculated due date for the entire service.
	Standard Duration	Calculated duration for the service, based on the accumulation of all tasks associated with the service.
	Total Price	Total cost based on the quantity of the service requested.

Other fields that display depend on the task, and are relevant to completion of the task.

**Step 3** Enter any additional information requested for the particular task.

**Step 4** Once you enter necessary information, click **Update** to save your changes. Otherwise, click **Reset** to reset to the default values. You can now re-enter your data.

**Note** You must click **Update** before navigating away from this page in order to save entered information. If you navigate to another page without clicking **Update** first, changes will not be saved.

## Completing Checklist Items

Checklist allows you to view and mark off task activities, if any, within a task. If a checklist has been configured for the task, and made mandatory, you must mark all complete before you can mark the task as complete. To view and mark off checklist items:

**Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).

**Step 2** Click **Checklist**.

**Step 3** Check the check box next to a step to mark the item as complete. To mark all items complete, click **Check All**.

**Step 4** Once you check all completed steps, click **Update Checklist** to save your changes.

**Note** You must click **Update Checklist** before navigating away from this page in order to save your changes. If you navigate to another page without clicking **Update Checklist** first, changes will not be saved. If the checklist has been configured as Required for this service, the **Done** button will not be enabled until all Checklist items have been checked.

## Viewing and Editing Delivery Process

Delivery Process displays detailed information about each task in the delivery process. For more information on delivery process, see [Delivery Process](#). To view all tasks in the delivery process:

**Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).

**Step 2** Click **Delivery Process**.

The Delivery Process page contains the following:

<b>Task Details</b>	Name	Name of the service task.
	Due On	Calculated due date for the particular task. See <a href="#">Understanding Due Dates</a> .
<b>Delivery Process</b>	Tasks	Click the task name to display Task Data information.
	Status	Current task status.
	Start Date	Actual start date and time of the task.
	Due Date	Calculated due date for the task, based on the service agreement.
	Completed Date	Actual completion date.
	Performer	User or queue assigned to completing the task.
	Supervisor	Manager for the particular task. This manager is assigned within Service Designer.
	Show Skipped Tasks	Click to show skipped tasks.
	Do Not Show Skipped Tasks	Click to hide skipped tasks.

The tasks are listed within the delivery process in chronological order.

**Step 3** To view a task within the delivery process, click the task name.

**Note** If you have permission to perform the task, the necessary [Using the Action Buttons](#) are displayed allowing you to check out and perform the task. If you do not have permission, you can only view the task information. No action buttons is displayed.

## Adding Comments to a Task

You can add comments and additional information regarding a task in the Comments and History section. Once added, your comment can be viewed by all users with access to the task, including the customer.

To add a comment to a task:

- 
- Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).
  - Step 2** Click **Comments and History**.
  - Step 3** In the Add Comment field, type your comment.
  - Step 4** Click **Add**.  
Your comment displays in the User Comments section.
- 

### Viewing Comments and History

Comments and History displays all comments entered by any user, as well as a history, or log, of system events for the particular task.

To view comments and system history:

- 
- Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).
  - Step 2** Click **Comments and History**.  
All the comments and history of the task is displayed.
- 

### Adding Attachments to a Task

You can add additional or supporting documentation to a task. Once added, attachments can be viewed by all users with access to the task.

To add an attachment to a task:

- 
- Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).
  - Step 2** Click **Attachments**.
  - Step 3** Click **Browse** to search for the attachment you wish to assign to the task, and then click **Open**.
  - Step 4** Click **Add**.  
Attachments added to tasks are governed by the Prime Service Catalog Site Administrator, who may set size limits and exclude certain file types.
- 

### Viewing and Editing Attachments

Attachments allow you to view and attach additional or supplemental documents to a task.

To view attachments:

- 
- Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).
  - Step 2** Click **Attachments**.
  - Step 3** Under **Attachments**, click the file name of the attachment you wish to view.
- 

### Deleting Attachments

You can disassociate any attachments assigned to a task by using the Attachments section of the task.  
To delete an attachment from a task:

- 
- Step 1** Check out and open the task. See [Checking Out Work](#) and [Opening a Task](#).
  - Step 2** Click **Attachments**.
  - Step 3** Check the check box next to the attachments you wish to delete from the task.
  - Step 4** To select all attachments, click **Select All**.
  - Step 5** Click **Remove Selected**.
  - Step 6** Click **OK**.
- 

### Viewing and Creating Ad-Hoc Tasks

Ad-hoc Tasks allows you to create an impromptu task not currently in the delivery process. You can specify if the new task can be completed concurrently with the current task, or if the delivery process must be placed on hold until the ad-hoc task is completed.

Ad-hoc tasks do not change the due date for the task, or for the entire service. In addition, if Pause is not chosen, then all ad-hoc tasks that are not completed by the time the delivery plan is completed are automatically cancelled.

To view ad-hoc tasks:

- 1 Check out and/or open the task. See [Checking Out Work](#) and [Opening a Task](#).
- 2 Click **Ad-Hoc Tasks**.

The Ad-Hoc page displays any current ad-hoc tasks previously created.

To create an ad-hoc task:

- 
- Step 1** Open the checked-out task, and click **Ad-Hoc Tasks**.
  - Step 2** Under New Ad-Hoc Task, enter the following information:  
Ad-hoc Task Information

<b>Subject</b>	Type a title for the ad-hoc task. The default entry is <RE: <i>task name</i> >.
<b>Performer</b>	Click <b>Search</b> to search for and assign a performer or queue to the ad-hoc task.
<b>Expected Duration (hours)</b>	Type the number of hours for task completion.
<b>Instructions</b>	Type any description instructions for the ad-hoc task.
<b>Pause current task until this ad-hoc task completes</b>	Check the check box if you must complete the ad-hoc task prior to completing the current task.

Fields marked with an asterisk (\*) are required.

### Step 3

Click **Start Ad-Hoc Task**.

The Ad-hoc task you just created displays in the Ad-Hoc Tasks section under the current task. The following information is provided:

Ad-hoc Task Details

<b>Subject</b>	Name of the task.
<b>Status</b>	Current status of the task. If the current task was paused, the status becomes ongoing (waiting) until the ad-hoc task is complete.
<b>Due On</b>	Calculated due date for the task. See <a href="#">Understanding Due Dates</a> .
<b>Performer</b>	Assigned service performer or queue.

Using Site Administration settings and creating Email templates for Ad-Hoc tasks, you can allow for automatic notification, including task details and instructions to be sent to the Ad-Hoc task performer.

## Tracking Work Effort

If configured for the task, Service Manager allows performers to log billable hours, information for work effort, and the cost for the work effort. This extra cost is above the cost of the service which is billed to the business unit.

To enter work effort:

### Step 1

Check out and/or open the task. See [Checking Out Work](#) and [Opening a Task](#).

### Step 2

Click **Effort**.

### Step 3

Under Add a New Task Effort Entry, enter the following information:

Task Effort Details

Category	Type of charge used for billing purposes. Choose <b>Labor</b> , <b>Materials</b> , or <b>Other</b> from the drop-down menu.
----------	---



Unit Type	Type of units, for example hours. Choose from the drop-down menu.
Quantity	Number of designated units, for example number of hours.
Date	Automatically generated date, displaying current date.
Unit Cost	Cost per unit; for example cost per hour.
Total Cost	Automatically generated cost based on quantity times unit cost.
Description	Any text describing the work effort.

Fields marked with an asterisk (\*) are required.

**Step 4**

Click **Add**.

Multiple entries may be made, documenting the efforts of multiple individuals in completion of the task.

## Viewing Task Instructions

If configured for the task, task instructions displays any additional instructions for the task.

To view task instructions:

**Step 1**

Check out and/or open the task. See [Checking Out Work](#) and [Opening a Task](#).

**Step 2**

Click **Task Instructions**.

The Task Instructions page contains the following:

Task Instruction Details

Task Details	Name	Name of the task
	Due On	Calculated due date for the particular task. See <a href="#">Understanding Due Dates</a> .
Instructional Details	Instruction	Additional instructions for the task
	Instruction URL	URL leading to further instructions, if any
	Instruction URL Description	Description of Instruction URL

## Checking In Incomplete Work

If, after checking out a task, you decide that you will not complete the task, you can return the task to the Available Work queue for other performers to check out and complete.

To check in incomplete work:

- 
- Step 1** Open the checked-out task. See [Opening a Task](#).
- Step 2** Click **Check In**.
- 

## Completing Work

Performing work consists of opening a task, checking it out, executing the work while entering necessary task data within Service Manager, and then submitting the task as done.



**Note** If you attempt to click **Done** before completing all steps, you will receive error messages listing the steps still required for completion.

---

To label a task as done:

- 
- Step 1** Open your checked out task. See [Checking Out Work](#) and [Opening a Task](#).
- Step 2** Verify that all necessary steps and information are complete for the task. You may need to check each of the following:
- Task details, see [Viewing Task Details](#)
  - Task data, see [Viewing and Editing Task Data](#)
  - Checklist, see [Completing Checklist Items](#)
  - Delivery process, see [Delivery Process](#)
  - Comments and history, see [Adding Comments to a Task](#)
  - Attachments, see [Adding Attachments to a Task](#)
  - Ad-Hoc tasks, see [Viewing and Creating Ad-Hoc Tasks](#)
  - Effort, see [Tracking Work Effort](#)
  - Task instructions, see [Viewing Task Instructions](#)
- Step 3** Click **Done**.
- Step 4** If you receive an error message, follow the instructions in the message to complete the necessary step. If you receive no error messages, then you have successfully submitted the task as completed.
-

## Printing Tasks

To print one or several tasks:

**Step 1** In the Service Manager page, check the check box next to the task you wish to print. You can print multiple tasks by checking multiple boxes.

**Step 2** Choose the desired print style from the **More Actions** drop-down menu. The following table depicts what information is provided for each print option:

	Full	Detailed	Compact	Data Only	Comments Only	Instructions Only
Task Details	✓	✓	✓	✓	✓	✓
Task Information	✓	✓	✓	✓	✓	✓
Requisition Information	✓	✓	✓	✓	✓	✓
Comments and History	✓	✓	✓		✓	
Service Information	✓	✓	✓	✓		
Task Data	✓	✓	✓	✓		
Delivery Process	✓					
Task Instructions	✓	✓				✓
Checklist Information	✓	✓				✓

The Service Manager Print window displaying the chosen tasks formatted for printing.

**Step 3** On the browser **File** menu, click **Print**.

**Note** When the mode is set to Full, Detailed, Compact, or Data Only, a grid on a service form will also be printed. However, the grid will be resized to fit the current fixed page size. Grid column widths will be proportionately increased or decreased, and the row height will vary to fit the contents of the cell.

## Using My Calendar

My Calendar tracks all ongoing tasks assigned to you that are not late. From My Calendar, you can export tasks to Microsoft Outlook. The tasks are exported as Calendar files. Once exported, you can open, add

information, and save the appointment to your Outlook Calendar. To view your assigned tasks using My Calendar, On the navigation bar, click **My Calendar**.

To export tasks to Microsoft Outlook:

- 
- Step 1** Under My Calendar, click the radio button next to the tasks you wish to export to Outlook.
  - Step 2** Click **Export To Outlook**.
  - Step 3** Click **Open** to view the task as an Outlook appointment.  
The appointment displays the calculated start and end dates and times for the task.
  - Step 4** Add any necessary information to the appointment.
  - Step 5** Click **Save** and **Close** to save the appointment to your Outlook calendar.
- 

## Managing Work

There are several manager types that have an impact on Service Manager, each having different responsibilities.

### Manager Roles and Responsibility

Role	Responsibility
Project Manager	Able to use the Monitor task to assign and reassign work, cancel the entire plan, or label a plan as complete.
Service Team Manager	Able to assign and reassign tasks, and reschedule work.
Task Supervisor	Able to cancel tasks assigned for management. This is an optional role that can be enabled.
Queue Manager	Able to view a list of queues on the Navigation Pane for which the manager is responsible.

## Managing Authorizations and Reviews

### Authorizing Tasks

Authorization tasks are those that require the assigned authorizer to allow a service request or product to move forward. Lack of authorization stops the delivery process. To approve or reject an authorization task:

- 
- Step 1** Open the task assigned to you for authorization. See [Opening a Task](#).
  - Step 2** Review task information.
  - Step 3** Click **Approve** or **Reject** as appropriate.
- 

### Reviewing Tasks

Review tasks are those that require the performer to review and approve a step in the delivery process. Until the performer approves the step, the delivery process is placed on hold. To review a task:

- 
- Step 1** Open the task assigned to you for authorization. See [Opening a Task](#).
  - Step 2** Review the task information provided.
  - Step 3** Click **OK** to acknowledge that your review is complete.
- 

## Managing a Project

A Project Manager is a person, position, or queue that is in charge of monitoring all tasks for a service. When a service is ordered, a Monitor task is created that runs concurrently with the delivery process. The title of Project Manager is assigned to whoever is given the Monitor task, even if the task is reassigned to another person. In this case, the new person becomes the Project Manager.

The Monitor task allows Project Managers to access all tasks associated with the service. Project Managers can then assign and reassign performers to each task, reschedule tasks, and complete or cancel the delivery plan.

### Assigning Staffing

Project Managers can assign certain service performers or queues to a particular task within the delivery plan of the service. To do this, Project Managers use the Staffing page of the Monitor task.

To assign/reassign staffing to a task:

- 
- Step 1** Open the monitor task for the service. See [Opening a Task](#).
  - Step 2** Click **Staffing**.
  - Step 3** Under Staffing, next to the task you wish to assign or reassign a staff member, click **Search**.
  - Step 4** In the "Search for" field, enter search criteria, and click **Search** to display your search results.
  - Step 5** Under Search Results, next to the staff member to whom you wish to assign the task, click the radio button.
  - Step 6** Click **OK**.  
You return to Staffing with the new staff member assigned to the task.
  - Step 7** Repeat steps 3 through 6 for all other tasks for which you wish to assign or reassign a staff member.
- 

## Completing a Plan

As part of the Monitor task, a Project Manager can declare a delivery plan complete, independent of whether all tasks were completed within Service Manager.

To mark a delivery plan as complete:

- 
- Step 1** Open the monitor task for the service. See [Opening a Task](#).
  - Step 2** Click **Done**.
- 

## Cancelling a Plan

As a Project Manager, you have the ability to cancel a delivery plan at any time during the delivery time line.

To cancel a delivery plan:

- 
- Step 1** Open the monitor task for the service. See [Opening a Task](#).
  - Step 2** Click **Cancel**.
- 

## Managing Service Team

A Service Team Manager is a person, group, or organization unit that manages a particular service. When the particular service is ordered, this manager has access to all tasks associated with the service, assign and reassign staff members to a task, and reschedule work.

To perform all the tasks as a Service Team Manager you must be assigned Service Team Manager role within Organization Designer.

## Locating Management Tasks

There are several locations a Service Team Manager can find a list of management tasks, depending on how and what is being searched, by using the different views offered to this role. Expand the following views on the Navigation Pane.

To search for Service Team Manager tasks:

Locate Management Tasks

<b>Queues</b>	Use the Queue view to search for a task with its queue, and reassign to other queues.  <ol style="list-style-type: none"> <li>1 Click + to expand all queues.</li> <li>2 Click the queue name to display a list of all tasks assigned to that queue.</li> </ol>
<b>Service Team</b>	Use the Service Team view to search for performers within their service team, and reassign work to other performers.  <ol style="list-style-type: none"> <li>1 Click + to expand service teams.</li> <li>2 To view a list of all tasks assigned to a service team, click the service team name.</li> <li>3 To view a list of all tasks assigned to a specific team member, expand the service team, and then click the team member name.</li> </ol>

## Assigning Work

If you are a Service Team Manager, you can assign and reassign tasks to Service Team members.

To assign or reassign a task:

- 
- Step 1** Locate the tasks you wish to assign or re-assign.
  - Step 2** Check the check box next to the tasks.
  - Step 3** In the appropriate view (Queue or Service Team), locate the desired performer and click the radio button.
  - Step 4** Click **Assign**.
- 

## Rescheduling Work

Service Managers can reschedule work tasks to a different date than the generated date.

To reschedule work tasks:

- 
- Step 1** Locate the tasks you wish to reschedule.
  - Step 2** In the Data Pane, check the check box next to the task you wish to open, and then click **Open**.
  - Step 3** Click **Reschedule**.
  - Step 4** To assign a specific date, click the **Set to this date and time** option, and then enter the date and time.

The format should be consistent with the existing date and time. You can click the calendar icon to choose a date and time.

**Step 5** To assign a calculated date after a certain time, click the **Compute earliest starting date after** option, and then enter the date and time using the format provided.  
The format should be consistent with the existing date and time. You can click the calendar icon to choose a date and time.

**Step 6** To reset the duration, type the number of hours in the New Duration field.

**Step 7** Click **Set Time**.

---