SysAid

Tasks/Projects

Module

Project and Task Management Module

The *Project* and *Task Management* tool is available in the full version of SysAid and in the full version 30-day trial. This module is not available in the free version.

Contents

This feature, has been designed for task and project management, and allows members of staff to:

- Track progress
- Track resource usage (personnel)
- Allocate time wisely
- Keep record of all activities and perform a search on them
- Store relevant documentation
- Review and record all versions of the project (A version numbering system operates providing the user with a review of changes made to the project over time).

With **Project and Task Management**, one can focus upon improving time management, track expended resources and oversee the successful completion of project deliverables. User-specific customization is available in **Project and Task Management**. The **Project and Task Management** interface simply lets you manage multiple-projects, add file attachments and input detailed information on project milestones and on personnel.

Working in the task interface you can easily build step by step your project, by detailing all tasks necessary you come closer to fulfilling the project's goals. All service requests associated with a project can be reviewed.

You do not need a large project in order to use the Project and Task Management module. You may just want to plan one task or schedule recurrent tasks; SysAid easily helps you do it.
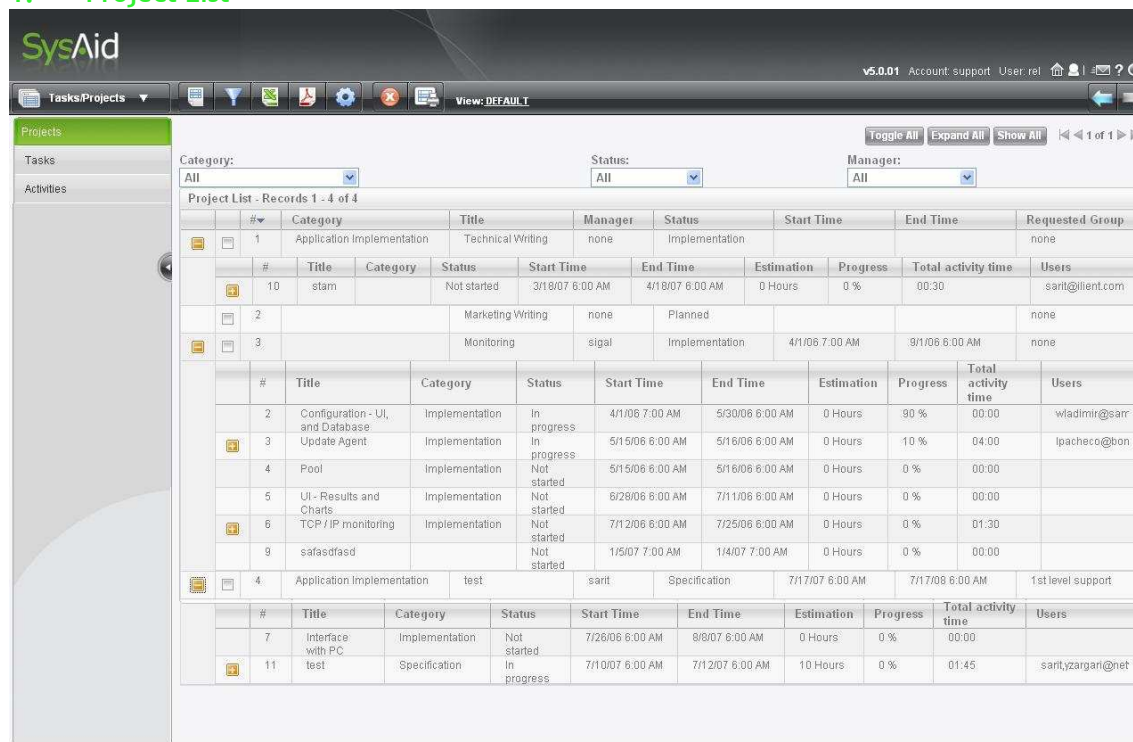
PROJECTS

Creating a project

A **project** is a clearly defined undertaking with a timeframe, a goal, and steps to achieve this goal. A project is comprised of tasks. Examples of projects are to create an application, test a system, or install and integrate new software.

1. Projects can be listed and created on the **Project List** page.

2. Go to **Tasks/Projects** in the sidebar. The **Project List** screen will open (Figure 1).

1.   Project List

3. You can create a new project by clicking the **New** icon. A new window called **General Details** will open.

2. General Details Page of a New Project

1. It is recommended to fill in as many fields as possible in this form. In the example above we have completed all the fields. When you will first open the **General Details** page you will be assigned a Project # number, which will appear at the top of the page. Once you have saved the **General Details** page and subsequently returned to the **General Details** page, the title of the project will appear next to the project number.

Table 1: Contents of the General Details Page for a Project

Field	Description
Title	Main project title
Category*	The list of project categories should be set by the administrator in Customized Lists (Go to Preferences→ Customize→ Customized Lists→ List. In the dropdown menu select Project Category. Add a number in the key box and project category names in the caption box).
Status*	The list detailing the Project Status should be set by the administrator in Customized Lists (Go to Preferences→ Customize→ Customized Lists→ List. In the dropdown list select Project Status. Add a number in the key box and project status names in the caption box).
Start Time	Click on the calendar icon and select a start date
End Time	Click on the calendar icon and select an end date
Raw Est	An estimate of the number of hours the project should take.
Manager	The manager in charge of the project
Requested Group	The group that has requested the project
Total task estimation	This field contains a calculation of the total estimation of the project based on the estimations of all tasks- as filled in manually by the administrator in each task related to that project.
Calculated Progress	This field is calculated according to the summery of the progress fields in all the tasks of the project. The calculation for a project with tasks i to n is the sum of each task estimation in hours multiplied by that task progress in percentage and divided by the sum of the estimation for all the tasks: $$\frac{\sum i\text{-}n(\text{task estimation} * \text{task progress})}{\sum i\text{-}n \text{ Estimation}}$$

*Project Category and Project Status should be customized in the Customized Lists tab.

4. Click **Ok** to save.

Adding Notes, File Attachments and Version Numbers

Throughout the duration of the project you can add a supplemental description, write notes to yourself and add important attachments to the project. Click on the **Description** tab, located next to **General Details**. Add text or file attachments, click **Apply** to save. If you have added notes or a new description these will be automatically time stamped by SysAid. As you change and update the project SysAid gives a version number so that you can see all changes that were made to the **Description** and the **General Details** tab. These are viewable in the **History** tab. In the **History** tab click on __project changed__ link to view the details.

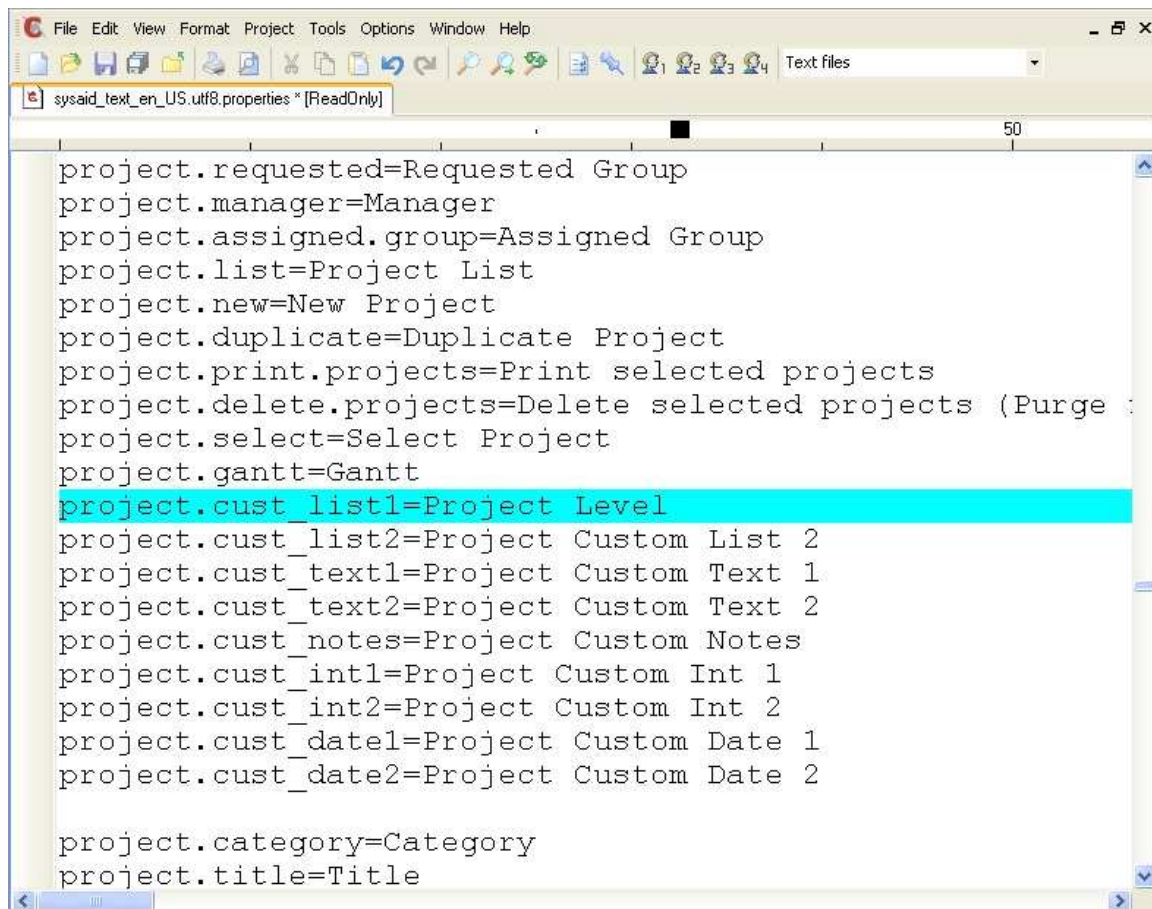## Overview of How to Add Customized Fields to Any Task or Project Page.

The **Tasks/Projects** portal contains an extensive selection of *add-in fields* which can be fully customized to meet your project needs.

1. First choose where you would like to add the new field in the **Project** or **Task** interface. Consider whether you require a text field; numeric field; a drop-down list, or a notes section to be added. The possibilities are detailed in Table 2 below under **Field Type** column. Choose a new name for this field.
2. Now go to **Preferences → Customize →Translate**.
3. In the **Translate page**, click to download the translate file. To edit the Translate file as a text file, you may use Notepad or a similar program.
4. Open the file to edit it. To look for the field name that now needs to be edited, press Ctrl + F and enter the field name as it appears in the SysAid dropdown list. For instance, you might want to change the name of the field: project.cust_list1(which appears on the left) to create a field that is useful for your purposes, let us say, "Project Level". A field such as this may specify the different levels

determined for your projects. See the table below for the exact default field names in the Translate file.

Note that in case you wish to add a customized field which is a list field, you will need to go through some more steps, which are described later.

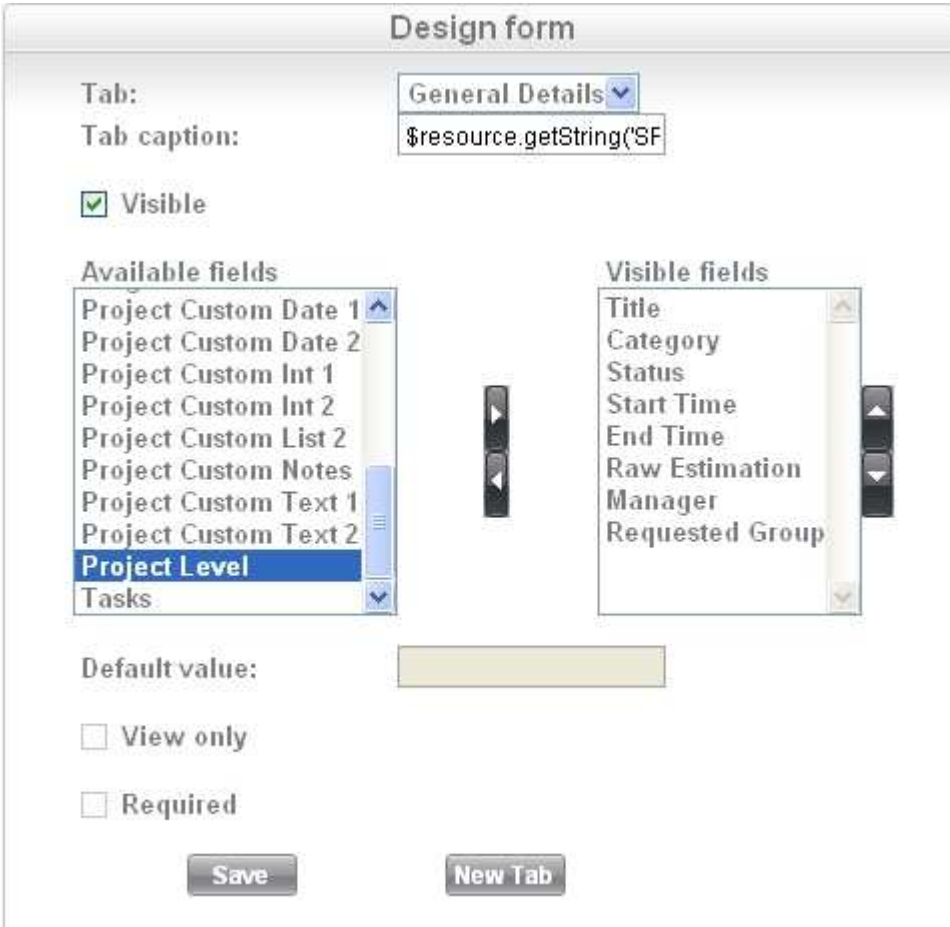### 3. Customizing a field for a Project

5. Type your new field name on the right, after the equals sign (=), (for example, "Project Level") instead of the default name (for example, project.cust_int1).

6. Save the file in an easily accessible location on your computer, for instance, on your desktop.

7. Now, from the Translate page in SysAid, upload the file you have just edited.

8. Go to the page where you want the field to appear and click on the Customize icon.

9. A pop screen will open, called **Design Form**. In the box called **Available Fields** you will now see the newly named field. Select it. Click on the arrow button to move it to the **Visible Fields** box.

4.   **Add a Customized Filed to the Project List**

Note that you can choose that the field will be of a view-only type, and the user will not be able to edit it.

5. Customize View Only Field

10. Click **Save.** This new field will now appear in the page.

Adding a Customized List to a Project or Task Page

1. After completing steps 1-4 described above, go to **Customized Lists**. This tab is located next to the **Translate** tab.
2. In the drop-down **List** select the newly created list field. The **Key** and **Caption** boxes will be empty. You should start coding your list.
3. In the key box you should use a numeric figure. Add the text description in the caption box. Click **Add** to save this line entry.

4. You can adopt any numerical coding sequence (1, 2, 3, 4, 5 or 10, 11, 12, 13, 14), the only rule is that you cannot use the same number twice as this causes the entry to be overwritten and do not use decimal point or commas.

5. Once you have added all entries to the list, click **Save.**

6. Finally go to the page where you want to add the list. Click on the Customize icon [icon].

7. A pop screen will open, called **Design Form**. In the box called **Available Fields** you will now see the newly named list field. Select it. Click on the arrow button to move it to the **Visible Fields** box.

8. Click **Save.** This new list field will now be updated and appear in the page.

Table 2: Names of the Project and Task Fields for Customization

Field name in the Translate page	Field Type
Project	
project.cust_list1	Creates a drop-down list (text or numeric)
project.cust_list2	Creates a drop-down list (text or numeric)
project.cust_text1	Adds text field only
project.cust_text2	Adds text field only
project.cust_notes	Adds a note box
project.cust_int1	Adds a numeric field only
project.cust_int2	Adds a numeric field only
Tasks	
task.cust_list1	Creates a drop-down list (text or numeric)
task.cust_list2	Creates a drop-down list (text or numeric)
task.cust_text1	Adds a text field only
task.cust_text2	Adds a text field only
task.cust_notes	Adds a note box
task.cust_int1	Adds a numeric field only
task.cust_int2	Adds a numeric field only

Add Customized Fields to Project, Task or Activities List Page

1. To see the new customized fields in any list page (Project, Task or Activities) go to the list page you want the field to appear.

2. Click on the Customize icon . The **Customize List** pop up screen will appear.

3. In the box called **Available Fields** you will now see the newly named list field. Select it. Click on the arrow button to move it to the **Visible Fields** box.

4. Click **Save.** This new field will now appear in the list page.

Duplicate Project

An option to duplicate a project (similar to the option of duplicating a service request) simply by clicking a **Duplicate** icon is available from within a specific project.

Go to **Tasks and Projects → Projects** page.

Click to open the project you wish to duplicate.

Click the **Duplicate** icon at the top bar

The project with all its tasks is duplicated. An example for a project you might want to duplicate can be – tasks that should be preformed when a new employee joins your IT team (from a template you have created for this purpose).

TASKS

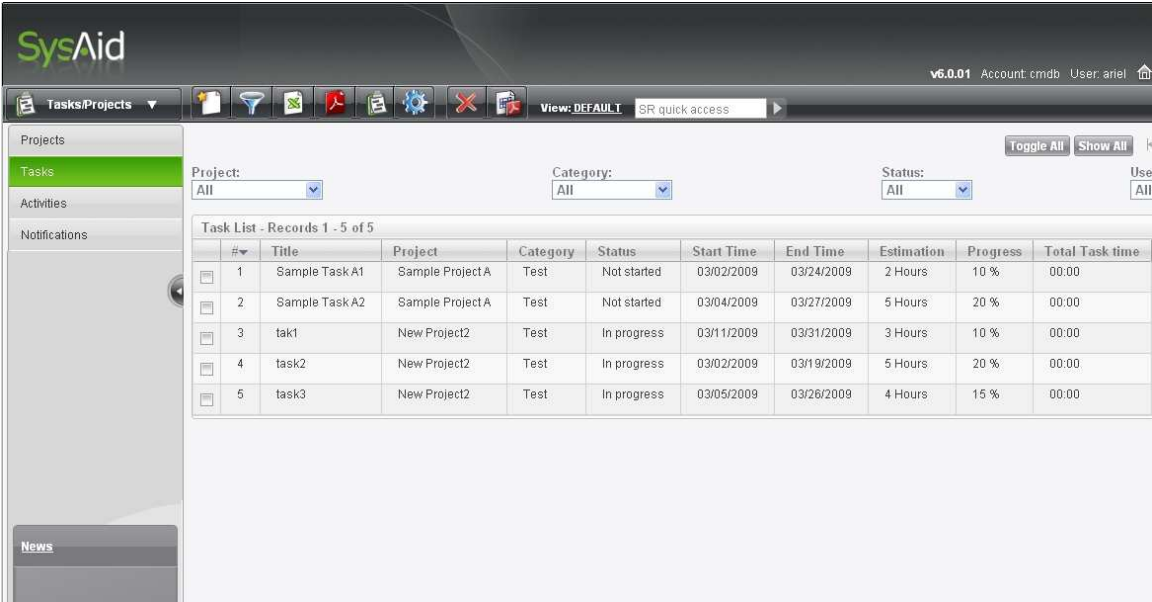## Viewing Current Tasks and Adding New Tasks

The success of every project is dependent upon the successful completion of a series of tasks. A task is a specific operation, usually one of many that comprise a project. Thus, tasks form smaller parts of a project. They are the steps necessary to complete the project.

A task will usually be assigned to a single individual. Different employees can work on their prospective tasks independently and concurrently.

Not all tasks belong to a project. A task may be a one off activity, for example to install Adware or be recurrent at designated intervals.

Click **Tasks** on the left menu to reach you tasks list. Note that you can display a gantt chart of all the tasks in the list, by clicking the **Tasks and Projects** icon at the top bar. The tasks that are grouped by categories will be displayed in groups.
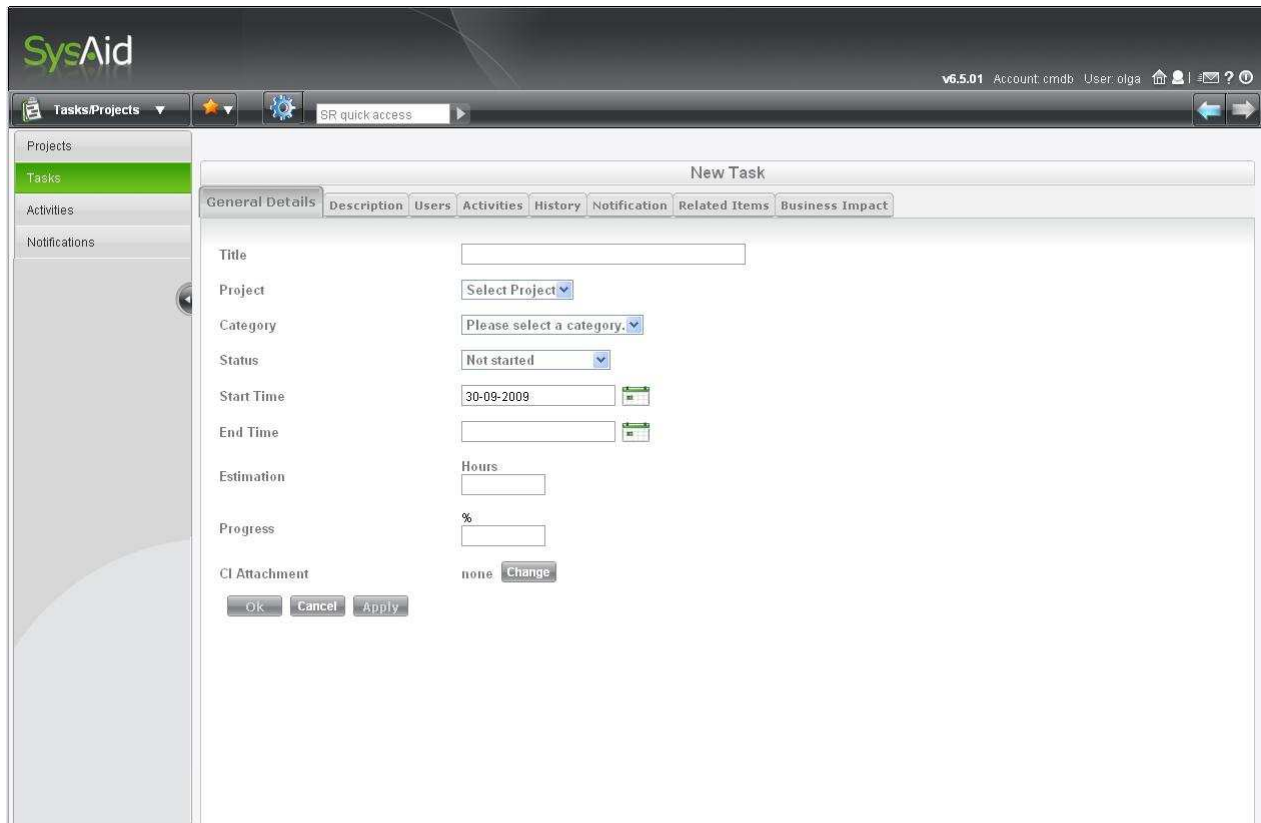
6. **Tasks List**

To enter a task that belongs to a project, go to **Tasks/Project →Projects**. Click on your project; to view your task, click on the **Task** tab, next to the **Description** tab where you can view and manage all your tasks for each project.

To create a new task, click on the **New** icon , under **Tasks**. A **General Details** page will open. Specify your task by filling out the form. It is recommended to add as many details as possible, as this information will help you managing the task in the future.

7.   **General Details Page for a Task**

Table 3: Contents of the General Details Page for a Task

Field	Description
Title	Task title
Project	Name of the project the task is part of
Category*	The list of task categories should be set by the administrator in Customized Lists (Go to Preferences→ Customize→Customized Lists→ List. In the dropdown list select Project Category. Add a number in the key box and project category names in the caption box).
Status*	The list detailing the Project Status should be set by the administrator in Customized Lists (Go to Preferences → Customize →Customized Lists → Project Category. Add Task Status names in the caption box).
Start Time	Click on the calendar icon to select a start date
End Time	Click on the calendar icon to select an end date
Est (hrs)	Hours you estimate that this task will take.
Progress (%)	The % of progress accomplished on this specific task. This field should be added if you want to take advantage of viewing your tasks via a gantt chart.

*Project Category and Project Status should be customized in Customized Lists tab.

View Tasks in a Gantt

To view graphically all of your tasks and timelines for a certain project go to the **Gantt** tab.

1. Go to **Tasks/Projects → Projects,** click on a project. One of the tabs contains the Gantt.
2. If you do not see anything make sure that you entered dates for the **Start** and **End time** fields and a value for the **Progress** (%) field for each of your tasks. In the Gantt, the green color relates to the percentage of progress you have already made. The grey part relates to the time needed to complete the task. This calculation is automatically made by SysAid based upon the Progress field.

3. To print the Gantt, right click on your mouse, and select **Print Picture**.

   It is impossible at the moment to print the Gantt using the **Print** icon ![pdf icon]
   at the top of that page.

8. **Gantt Chart displaying the grouping of tasks per category**
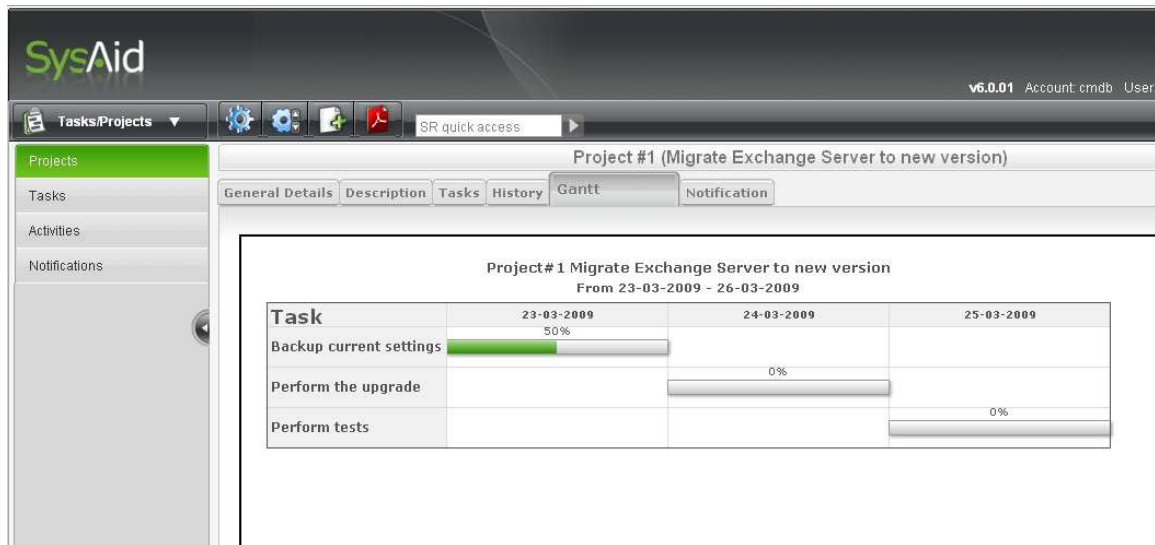
Business Impact

Under this tab you can choose to attach a CI to tasks. SysAid can displays the business impact of each task. Click the 'Change' button to choose a CI to attach to the task, and define the CI relations. To learn more about the advantages you can gain from defining relations in your CMDB, please consult the CMDB Guide.

History and Version Numbers

The **History** function is an automated feature of SysAid. Whenever you change any information of the project in **General Details** or in the **Description** tab SysAid time stamps this change, records the change and gives it a version number. Click on the **History** tab, the most recent changes appear at the top of the **History** table, in descending order. In the **History** tab click on **project changed** to view the details.

Schedule Recurring Notifications

SysAid enables creating either automatic or manual recurring notifications, correlated to a task, or to a number of tasks which form a project. The recurring notification can be sent either on a single occasion, or on a daily/weekly/monthly basis. The recurring notification can be useful in two main cases: When Building a template for a recurring project – for example, the IT tasks procedure for a new employee. In this case you can configure that the different tasks in your project will always launch the sending of a certain notification, either by email, SMS, or by opening a new SR. In the case of a new employee, for instance, you can determine that whenever a new employee is added, SysAid will open an automatic service request with a list of all the different tasks that should be performed (preparing a new PC, telephone, cubical, etc.). You can also set different notifications for different tasks: for instance, "Connect a Telephone for a New Employee" notification can be sent to the logistic administrator in your organization.

To launch all tasks of your recurring project immediately, go to: **Tasks and Projects → Projects →** your recurring project **→ Notification**. Note that in the case you are scheduling a notification for a recurring project, the name you insert for the different tasks are important, because they will appear as the title of the SMS/Email/SR which will be sent automatically. From here you can launch all the tasks related to this project at once, with the titles you have entered.

9. Project Notification
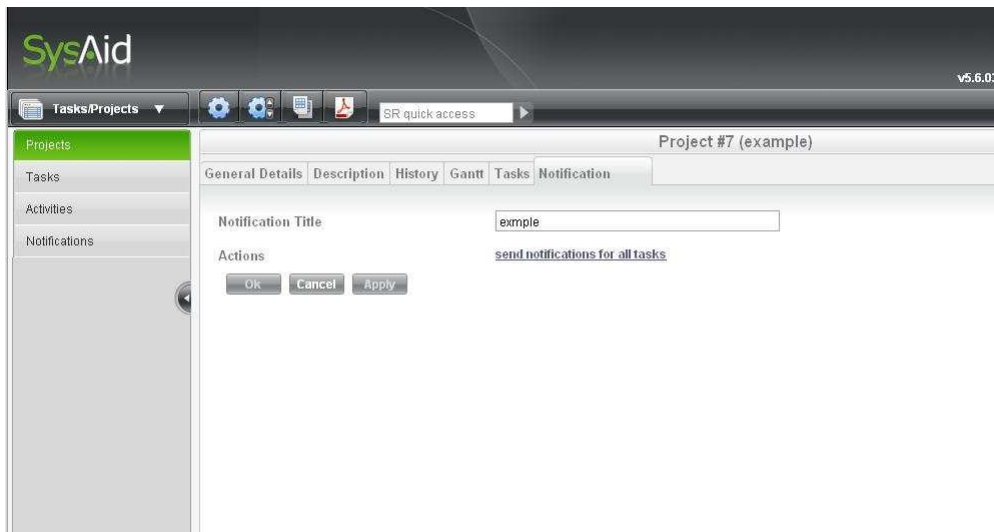
At times, an individual task should be performed regularly on certain occasions, and you wish to remind the person in charge. In this case, you can also schedule the notification. For instance, you may want to send an email notification to the IT team leader to go over the end of year checklist. You can simply schedule, for the end of December each year an email notification regarding the end-of-year checklist task.

To create a recurring event, please set a suitable notification first.

10.   Task Notification

Go to ![icon] **Tasks/Projects** → **Notifications**→ Click the **New** icon ![icon], and fill in the notification suitable for your recurring task.

Then, go back to ![icon] **Tasks/Projects**→**Tasks**, and click the **New** icon ![icon] to create a new recurring task. Under the **Notifications** tab of this task, choose your preferences for the recurring incident. Select the notification you have prepared from the dropdown menu. You can choose to send the notification once at the present moment, by clicking the button **Send once; now**.

11. Recurring Task

Navigating to Tasks – Three Options

1. One can view all tasks associated with a project by selecting **Tasks/Projects** from the sidebar; then select a project from the project list, and finally select the **Tasks** tab.

2. An alternative way of viewing task information is by clicking on **Tasks/Projects**; then click on **Task** from the sidebar menu. This opens the **Tasks List** page. All tasks for all projects are listed here. From here, if you click on a task, the **General Details** page of that task will open. In this interface you have the addition of the **User Tab**. You can add users to the **Task** list by using the **Add Users** button. Note

that you can display a Gantt chart of all the tasks in the Task List, by clicking the **Tasks and Projects** icon at the top bar. The tasks that are grouped by categories will be displayed in groups.

12. Task List which Belongs to a Project
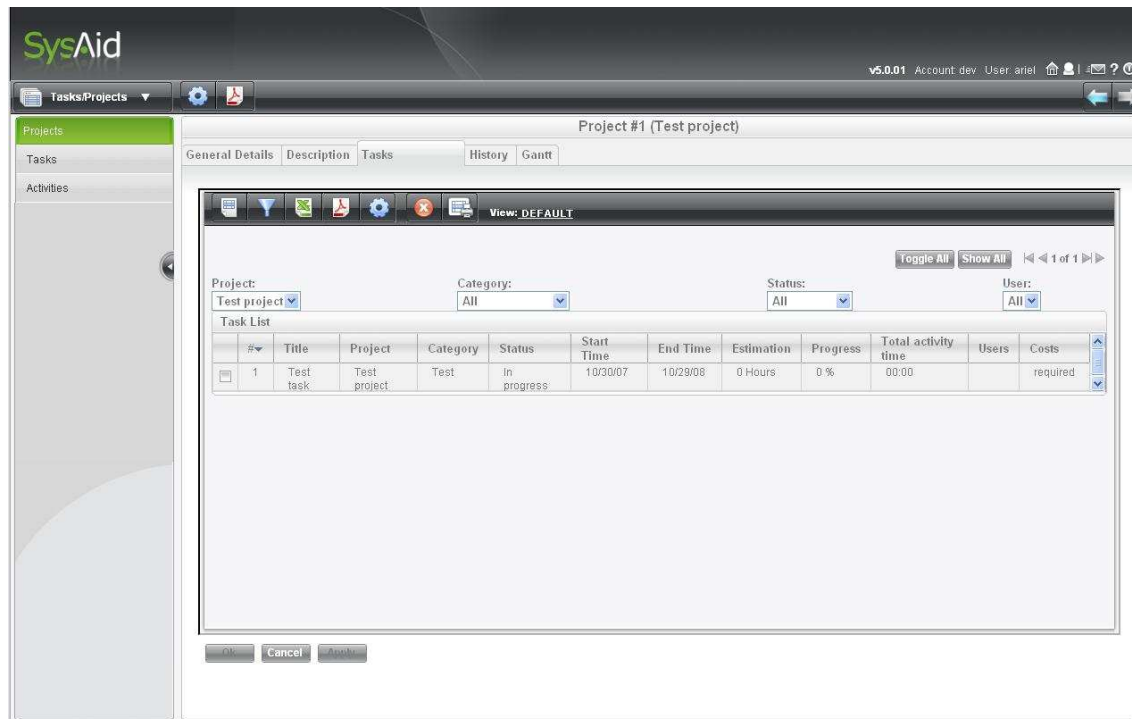
3. Finally you can access **Tasks** by clicking on **Tasks/Projects,** and then clicking on the plus image. All tasks associated with that project will be listed.

Calculating Total Activity Time on a Project

In the **Task List** page, the table has a column called **Total activity time**. The total activity time enables you, as a project leader or project manager, to know how many hours each administrator, including you yourself, worked on the project. This information can be used for billing purposes or just for administrative review. To view the activity time:

1. Go the specific task. Click on **Tasks/Projects →Tasks**. The **Task List** page will open.
2. Once you have completed working on the task, and have hours to report, click on the task you want to report hours for. Click on the **Activities** tab. The name of the task you will report your hours for will feature at the top of the page.
3. Select the username for the person who completed that task in the **User**: field, with the **Browse** button.
4. Enter a **Start Time** and an **End Time.**
5. Provide a **description** of the work undertaken.
6. Finally click **Add.** This information will move to the table under the **Activities** tab, positioned below.

Overview of Activity Time by User

SysAid lets you view the activity time on projects by a single user or by all users.

1. Go to **Tasks/Projects** sidebar → **Activities.** In the column heading called **User** you can click to see the tasks performed by users in alphabetical order.
2. Click on **Show All** at the bottom of the page to view all the users.
3. If you want to view a specific user immediately, and you know their exact username, click on the **Filter** icon.

4. In the dropdown menu called **Choose an Element**, select **User**.

5. In the blank box type the exact name of the user (exact spelling required).

6. Now click **Create This Filter** button.

7. SysAid will open a page listing of all the activities performed by that user.

8. Click on one of the activities in the list and a **Task** page will open. Here you will see listed all users that have worked on that particular task.

Customizing the Project Pages

A task that belongs to a certain project can be configured to appear in the **Project List** page. This allows users to easily navigate from a project to its tasks, and to easily create new tasks in a project. You can show a task that belongs to a certain project by selecting to view the Tasks field when customizing the project form.

1. Go to **Tasks/Projects**

2. Click on the **Customize** icon .

3. A **Customize List** screen will open. You can move fields from the **Available Columns** to **Visible Columns** by using the arrow button. For example you can add **Tasks**, to the **Visible Columns** so that you will be able to see all the **Tasks** in the **Project List** page without always having to move to the **Task** tab.

4. In the **Save as** option at the bottom of the screen you can save this as a new view or retain it as the default view. To learn more about creating different views, please read section 8 in the SysAid User Manual:
http://ilient.com/down/SysaidUserManual.pdf

5. Finally click the **Save** button.

The above customization can also be performed on the **Task** page whenever you can see the **Customize** icon and on any other page that displays this icon.