Task Templates Table

This table holds records that serve as templates for automatically generated tasks. Each Template record specifies a Task related to one of the other tables. Task Templates have a Related To field, just as tasks do, and they may be linked to a specific contract, service, task workflow, or project type. Task Templates define the method of assignment, the expected number of working hours to complete, and any prerequisite tasks.

Task Templates may be combined within a Task Workflow, or they may be independent of a workflow. They can be combined to form a set of "User Selected Tasks" linked to a service or project type, or a single task template may be linked to a service for a change request.

Use Case

Task Templates are related to either the Contract, Project, Change Request, or Service Request tables using the Related To field at the top of the Task Template record.

Whenever a Task Template is used to generate a Task, a conversion is done from the Task Template table to the Task table, mapping important information in the Task Template to the Task record that is generated. This Task record is linked to the Contract, Service Request, Project, or other process table that triggered it, as well as being linked back to the source task template.

Templates can be made inactive when they should no longer be used, and that will prevent them from being generated as tasks. When the Status is changed to Inactive, an edit rule called 'Edit: Other edit actions - unlink inactive task template, handle cloned templates' will blank out any link to a task workflow, project type, or service, so that it will no longer appear as available in those services or new projects.

Template Details Tab

All the fields that users can fill out are on the Template Details tab:

Task Template: Usage

ID	397	Template Status	Active			*Related To	Contracts

*Task Title
Usage

Diagram

Sequence
1

Template Details   **History** « »

Collapse All

Task Type	Obligation	Auto-Complete?	○ Yes ● No
Task Generated from a Workflow?	No		
*Task Usage	Optional	Notify Contract Manager on Completion?	○ Yes ● No
Assign Task Based On	Person from Contract	Assign To	Contract Requester
User Selectable for Contract Types	Master Services Agreement 🔍		
Obligation Source	Contract Type		
Obligation Type	Customer		
Obligation Output	Report		
Description	Customer agrees to send an extract of their usage of our system on a monthly basis for the duration of their subscription.		
Attached Files	Attach/Manage Drag&Drop files		

- The Task Title field should not contain commas, as this prevents errors when running the task automation rules. A rule prevents task titles from having commas in them, and if a comma is stripped out, provides a popup message alerting the creator that it has been stripped.
- The Related To field links Task templates to Service Requests, Change Requests, or Projects.
- Sequence field gives a rough idea of the order of dependent tasks.
- The Task Type field is used to define how the task is used. The selected option can be used in filters, but there is no logic behind any options other than Notification and Obligation.
  - When Notification is selected, additional fields appear that allow the user to define the Email Subject and Body for notification. Notifications are also set to auto-complete.
  - When Obligation is selected, additional fields appear: Obligation Source (Contract Type / Contract Clause / Ad Hoc), Obligation Type (Customer / Internal / Customer and Internal / Partner / External), Obligation Output (Audit / Delivery / Document / Hold Private / Notification / Payment / Report / Other).

- Task Usage may be Default, Conditional, or Optional. Both Default and Conditional tasks are created with a Queued status when tasks are launched. Default tasks are set to Assigned immediately when the Assignment Trigger is met. Conditional tasks are evaluated when the Assignment Trigger is met. If the condition is false, then the conditional task is set to Not Needed. For Conditional Tasks, the condition should be defined using the variables from the Tasks table since the evaluation takes place there. Optional is the usage of a task that is not generated from a Workflow.
- The Assign Task Based On field allows you to define a task template whose resulting task is assigned to the person defined in the main record. The default of Assigned Team / Person lets you add the assigned team or person in the task template. A different value allows you to choose a variable that has been pre-configured in the Replacement Variables table. For instance, for a task related to a Change Request you will see these options:

- The choices in the Assign To field are set, edited, and created in the Replacement Variables table.
- The Number of Working Hours to Due Date field is used to set the task's Date Due once the status is marked Assigned, by adding the defined number of working hours (for the assigned team) to the current time.

Note that if you set a task to be assigned in this way, but there is no value in the selected field, then the task will not be properly assigned. For instance, there is no submitter manager defined in the Service Request record. As a backup, such tasks are assigned to the 1st Level Support Team.

Assignment Trigger

This section allows you to define the Assignment Trigger, which is used to set the status from Queued to Assigned. The options for this field are:

- **Date**: Choose from a fixed date or a relative date based on the contract. Choosing a fixed date may require the task template to be updated in the future.
- **Status**: When the contract changes to the selected status, the associated task created from the current Template is set to Assigned.
- **Creation / No Open Prerequisites**: The task is set to assigned as soon as it is created, provided the Task Usage is Default, Optional and selected, or Conditional and the condition is met.

Task Recurrence

This section allows you to set task recurrence. When Recurring Task choice is switched to Yes, new fields will appear:

- **Default Number of Occurrences**: Optional field for circumstances when number of occurrences for a task can be easily predicted, for example if the contract term is typically 5 years, there will be 5 occurrences of an annual task.
- **Recur Every**: number field to hold number of Days / Weeks / Months / Years between task occurrences.
- **Recurrence Unit**: Days / Weeks / Months / Years.

Prerequisite Tasks

If the Task Template is associated with a workflow where Enable Prerequisite Tasks is set to Yes, and the Assignment Trigger is set to Creation / No Open Prerequisites, the Prerequisite Tasks section appears.

- The Choose a Task to Add field is used to select a task for the same workflow to be a prerequisite task to this one.
- The Prerequisite Task to Remove field is used to remove a task that was previously defined as a prerequisite.

These fields are used in conjunction with the action buttons to their right. Note that prerequisite task setup is only visible and enabled if the task template is linked to a Task Workflow and if the linked field Workflow Enable Task Prerequisites = Yes. Otherwise, these fields are not be visible.

Task Steps

At the bottom of the tab is the option to set up a task checklist. If Yes is selected, then you can add individual steps and define the order the checkboxes should use.

To add steps, first check the Create New Checklist Item? checkbox, then fill out a Step Name and Step Number, then click Create Task Step. This is a handy way to provide a list of troubleshooting steps or a list of things to be done within a single task.

Related Information Tab

This tab may show the record that contains this task template. If the template is part of a task workflow, the workflow will be listed.

Automation

The automation on the Task Template table includes rules to strip out any commas from the task title, a rule to update the sequence of task templates in relation to other templates for the same workflow, and a rule to unlink inactive task templates.

In addition, the system tracks the service requests and projects for which a task template based on user selection has been generated so that users are prevented from generating the same task for the same parent record. Since change request tasks must be generated multiple times, one for each asset, we cannot block this in the same way.

Cloning Task Templates Along with a Task Workflow

Task workflows may be cloned and then modified, and when a task workflow is cloned, its task templates and any task steps are also cloned and linked to the new workflow.

Cloning reproduces all the elements of the original task template.