Deskpro

Automatically create tasks with relative due dates

2019-09-02 - Colin Dunn - Comments (0) - Product

You don't just need to use your helpdesk for support, and increasing number of clients use Deskpro for change, workflow and task management. A common example we see in HR and Recruitment would be a set of tasks to complete when a new employee joins or leaves a company - however you can apply this process in practically any working environment.

What has been changed?

As part of our continuing efforts to improve tasks and automations you are now able to configure ticket triggers and escalations which can create a set of tasks for an agent, with **relative due dates.**

Criteria

The criteria section is a list of terms that must match before the actions are applied to the ticket.

| when | The following conditions are met: |

Department   is ▾   ✕ New Hire

> A ticket comes into a certain department

➕ Criteria

Actions

> Urgent tasks may require immediate action

These actions will apply when all of the criteria pass.

| then | The following actions will run: |

Create Task

Task Title: Fire and Safety Training

Due Date: ○ None   ● Relative time   ○ On a specific date
24   Hour(s) later ▾

Public: ☑ Yes

Creator: Current Agent ▾

Assignee: 1st Response Crew ▾

Link to ticket: ☑ Yes

Create Task

Task Title: Introduce to a Line Manager

Due Date: ○ None   ● Relative time   ○ On a specific date
7   Day(s) later ▾
Minute(s) later
Hour(s) later
Day(s) later
Week(s) later

Public: ☑ Yes

Creator: Current Agent

Assignee: Support ▾

Link to ticket: ☑ Yes

> Flexible timeframe units for different tasks

Create Task

Task Title: Determine Eligibility for Annual Performance Bonus

Due Date: ○ None   ○ Relative time   ● On a specific date
01 November 2019   UTC +9:00 ▾

Public: ☐ Yes

Creator: John Doe ▾

Assignee: Managment Team ▾

Link to ticket: ☐ Yes

> A choice between **relative** and **specific dates** still exists

➕ Action

When would we use this?

In the above example, we can see there are some main tasks to complete for a new hire.

1. The employee must immediately be familiarised with the fire exits and basic safety guidelines. **Within 24 hours of ticket creation.**

2. A suitable line manager must chosen for the employee, after they have had a change to settle in. **Within 7 days of ticket creation.**

3. The management team must review the employees Annual Bonus on a specific date.

This has infinite application, from IT Service Management, Sales and Government/Public Sector applications which require robust automation in their tasks and and workflows.

In summary?

This is a very powerful enhancement to the tasks management system, allowing you to fully automate what has previously been delicate and tiresome workflow. There is now no need for a support manager to repeatedly create or enforce deadlines, the helpdesk will take care of this.

How do we get started?

This feature will apply automatically after upgrading to 2019.7. The "Create Task" feature is available in all types of ticket trigger and escalation.