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Automatically create tasks with relative due dates

2019-09-02 - Colin Dunn - Commentaire (1) - Product

You don't just need to use your helpdesk for support, and increasing number of clients use Deskpro for change, workflow and <u>task management</u>. A common example we see in <u>HR and Recruitment</u> 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 <u>tasks and automations</u> 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. The following conditions are met: A ticket comes 3 Department ▼ X New Hire into a certain department **⊕** Criteria Actions Urgent tasks may require These actions will apply when all of the criteria pass immediate action The following actions will run: 0 Task Title: Fire and Safety Training Due Date None 24 Hour(s) later ▼ Public: ✓ Yes Create Task Creator: Current Agent Assignee: 1st Response Crew Link to ticket Yes 0 Task Title: Introduce to a Line Manager Due Date None Day(s) later Minute(s) later Flexible Public: Yes Create Task Hour(s) later timeframe units Creator: Current Agent for different Week(s) later tasks Assignee: Support Link to ticket: Yes 0 Task Title: Determine Eligibility for Annual Performance Bonus Due Date None On a specific date Relative time 01 November 2019 UTC +9:0 Create Task Public: Yes A choice between relative and specific Creator: John Doe

When would we use this?

Action

Assignee:

Link to ticket:

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

Managment Team

Yes

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

dates still exists

- 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.