Service Desk: Tasks

Service Desk provides an easy interface where college and department administrators can create requests and track the status of their requests, while Sponsored Research Services (SRS) team members can be assigned to requests and manage request queues.

The Tasks feature in Service Desk provides a streamlined way to track pending actions on cases, improving communication and reducing the need for external tracking tools and email status checks.

This document is a companion to the Success Factors training video found at https://performancemanager8.successfactors.com/sf/learning?destUrl=https%3a%2f%2fuc%2eplateau%2ecom%2flearning%2fuser%2fdeeplink%5fredirect%2ejsp%3flinkId%3dITEM%5fDETAILS%26componentID%3dResearch%5fServiceDeskTasks%26componentTypeID%3dCOURSE%26revisionDate%3d1787577960000%26targetStudentSysGUID%3d%26actingAs%3d%26fromSF%3dY&company=UCPROD

What Are Tasks?

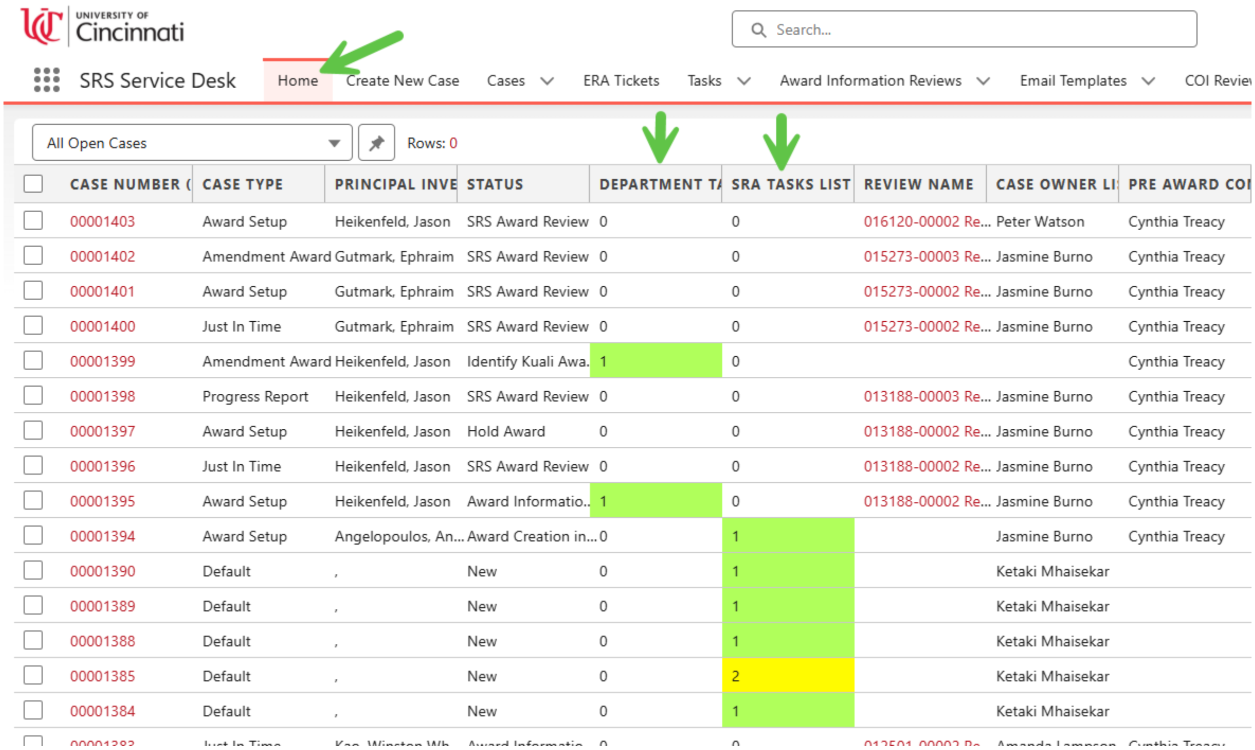
Tasks are action items that are associated with a case. They help clarify:

- **Who** is responsible for what;
- **What** needs to be done; and
- **When** it's due.

Why Use Tasks? The SRS team uses the Tasks feature to maximize efficiency and minimize turnaround time on service requests. With Tasks, both requesters and the SRS team have visibility into all pending actions without the need for external tracking tools. This gives the SRS team a consistent and transparent way to organize their workload by due date, improving accountability and follow-up, and streamlining coverage when one team member is out of office.

How to Access and Manage Tasks:

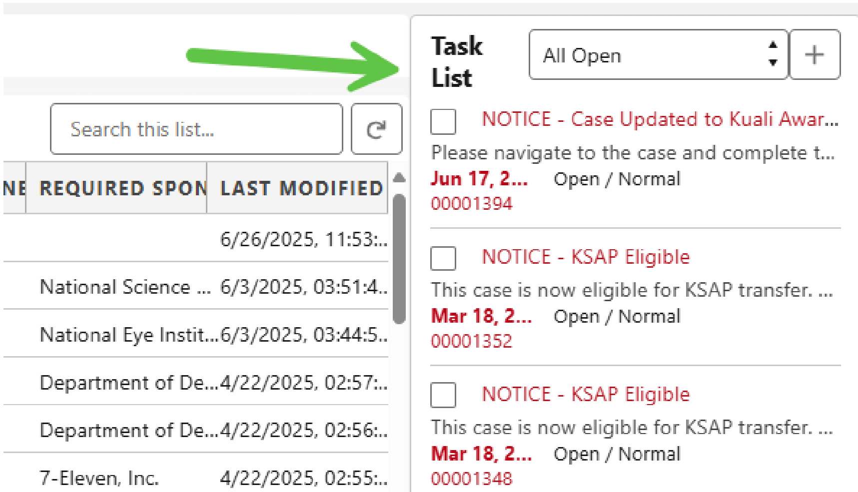
1. **The Home Screen List View** has two columns for tasks: one for tasks assigned to SRS team members and one for tasks assigned to Department staff. This view provides a quick glance at which cases have tasks assigned. The Department Tasks column has a colored box if there's a task for the department to do, and the SRA Tasks column has a colored box if there's a task for a sponsored research administrator (SRA) to do.



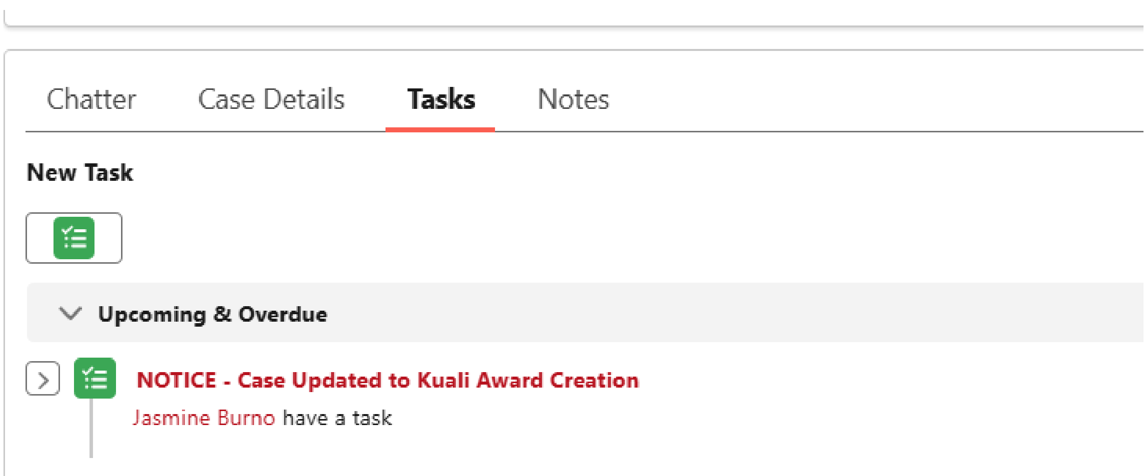
CASE NUMBER (	CASE TYPE	PRINCIPAL INVE	STATUS	DEPARTMENT TA	SRA TASKS LIST	REVIEW NAME	CASE OWNER LI	PRE AWARD CO
00001403	Award Setup	Heikenfeld, Jason	SRS Award Review	0	0	016120-00002 Re...	Peter Watson	Cynthia Treacy
00001402	Amendment Award	Gutmark, Ephraim	SRS Award Review	0	0	015273-00003 Re...	Jasmine Burno	Cynthia Treacy
00001401	Award Setup	Gutmark, Ephraim	SRS Award Review	0	0	015273-00002 Re...	Jasmine Burno	Cynthia Treacy
00001400	Just In Time	Gutmark, Ephraim	SRS Award Review	0	0	015273-00002 Re...	Jasmine Burno	Cynthia Treacy
00001399	Amendment Award	Heikenfeld, Jason	Identify Kuali Awa...	1	0			Cynthia Treacy
00001398	Progress Report	Heikenfeld, Jason	SRS Award Review	0	0	013188-00003 Re...	Jasmine Burno	Cynthia Treacy
00001397	Award Setup	Heikenfeld, Jason	Hold Award	0	0	013188-00002 Re...	Jasmine Burno	Cynthia Treacy
00001396	Just In Time	Heikenfeld, Jason	SRS Award Review	0	0	013188-00002 Re...	Jasmine Burno	Cynthia Treacy
00001395	Award Setup	Heikenfeld, Jason	Award Informatio...	1	0	013188-00002 Re...	Jasmine Burno	Cynthia Treacy
00001394	Award Setup	Angelopoulos, An...	Award Creation in...	0	1		Jasmine Burno	Cynthia Treacy
00001390	Default	,	New	0	1		Ketaki Mhaisekar	
00001389	Default	,	New	0	1		Ketaki Mhaisekar	
00001388	Default	,	New	0	1		Ketaki Mhaisekar	
00001385	Default	,	New	0	2		Ketaki Mhaisekar	
00001384	Default	,	New	0	1		Ketaki Mhaisekar	

The color of the box, and the number in it, indicates how many tasks need to be done on each case: a green box shows that there is one task needing to be done on that case, yellow indicates two or three tasks, and orange indicates four or more tasks.

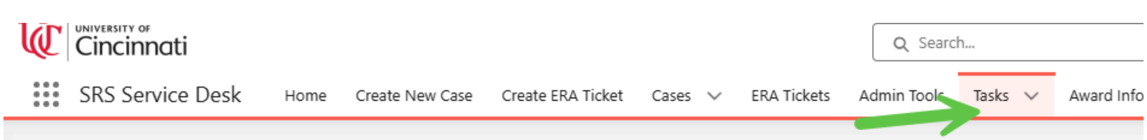
2. **The Home Screen Task List** on the right side of the home screen shows a quick view of all open tasks with basic case information for each.



3. **The Case Detail View:** When you click on a task's title or case number, a more detailed view of that task will open. Now you're viewing a specific case and can see all the pending and completed tasks that are linked to that case.



4. **Tasks Assigned to You:** Clicking the Tasks tab at the top of the Home Screen will show all your assigned tasks across cases, sorted by due date or status.



Types of Tasks:

1. **System-Generated Tasks:** These are created automatically as a case moves through the Service Desk system.

   Some of these, such as Identification of IP and Award Information Entry, are assigned based on workflow and are automatically marked as completed when the case moves to the next step.

   Other system-generated tasks with non-workflow actions, such as Budget Update, Protocol Information, and Generic Tasks, require you to manually mark them as complete.

   The table below shows the stage at which each type of task is created and how it becomes marked as complete.

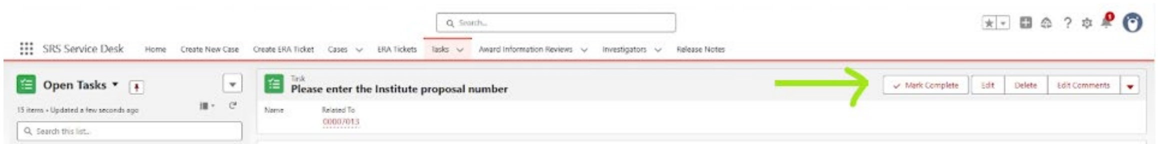
Task	Created When	Completed When
Identification of IP	When Case gets created and assigned to a particular Department Contact	When workflow advances to the next step
Award Information Entry	When SRA finishes Kuali Award Creation	When workflow advances to the next step
Budget Update	When Department Contact finishes the Award Information Entry Stage	Requires manual action to complete.
Protocol Information Needed	When SRA indicates protocol information needs to be updated	Requires manual action to complete.
Generic Task	Created by SRA and assigned to Department Contact on that Case	Requires manual action to complete.

2. **Tasks Created by SRS Team Members:** These can include tasks that might be unique to a particular case or that are based on specific follow-up needs. As an example, if required documents are missing from one particular case, an SRA will create a task called “Upload required documents in the Kuali award record” for that case and assign the task to the department contact.

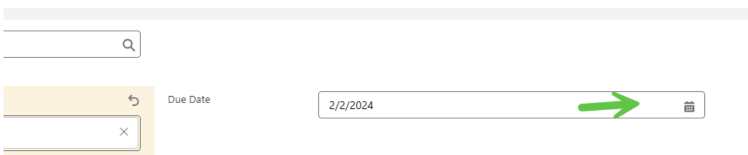
3. **Self-Created Tasks**: All users can create tasks manually and assign them to themselves as a to-do list. Examples of this type of task could include “Confirm budget approval with department chair” or “Request missing document needed for SRS review”.

Managing Tasks:

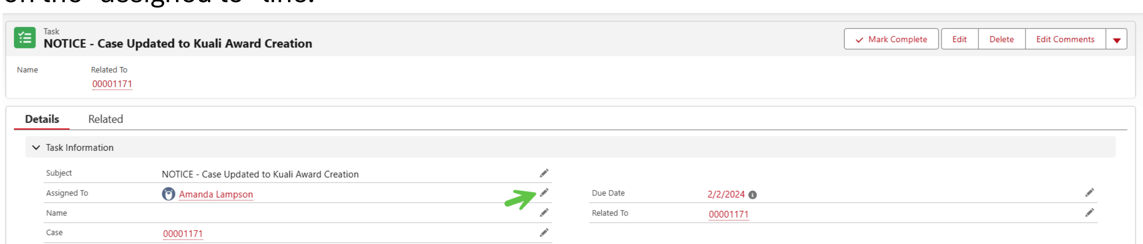
- **How to Change a Task's Status to Complete**:
  Open the task and set the status to Complete by clicking the "Mark Complete" button in the upper right corner.



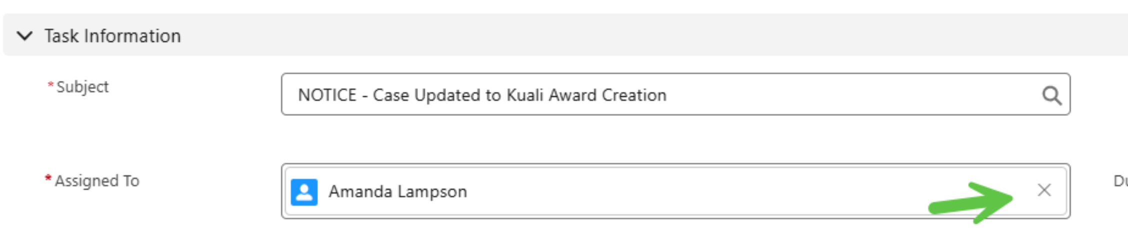
- **How to Change a Task's Due Date:**
  Click on the calendar icon next to the due date. Select a new date and click Save at the bottom.



- **How to Reassign a Task to Another Person**: When a case gets re-assigned to a different pre- or post-award person, then any tasks associated with that case will automatically be reassigned as well. However, you can also manually reassign a single task to another pre- or post-award person without reassigning the whole case. To do this, click on the pencil icon on the "assigned to" line.



  Click the X next to the current name to clear it.



  Search for the new name and click save at the bottom. In this screen, you can also change the subject line so that the task is described accurately at all stages of completion.

Best Practices for using Service Desk and Tasks:

- **Check your Task List View daily** to make sure you stay on top of all your deadlines.
- **Use due dates** to prioritize your work.
- **Keep each task's status updated** to reflect your progress.
- **Use the Comments section** to provide additional information and updates on pending tasks.
- **Avoid using spreadsheets or external trackers for anything that Tasks can do**.