Within the platform, all ITIL processes are handled through tasks. A task is a specific type of record, controlled by the base class task. Tasks are created by users who are requesting the task to be performed, and are then updated as the task moves along the workflow. A task is created, work is performed upon it, and eventually it moves to a resolved state. Tasks allow users to request tasks, and track how they are being fulfilled by the appropriate parties. Tasks can be assigned to specific users or user groups. Many tasks are extended by child classes, such as Incident or Change.

**2 Out of Box Task Fields**

|  |  |
| --- | --- |
| **Field Name** | **Description** |
| Number | An identifying number for the task, which is used as the name of the task. Numbers are generated automatically when the task is created. Administrators can modify the number generation using [number maintenance](http://wiki.servicenow.com/index.php?title=Managing_Record_Numbering). |
| Priority | A signal of how high a priority the task should be for the assignee. When viewed on the Record List, the priority field will be color coded by degree of priority. |
| State | The status of the task, such as: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped. |
| Assigned To | The user or user group responsible with fulfilling the task. |
| Escalation | A signal of how long the task has been open. Usually, escalations are automatically configured using a Service Level Agreement. The longer the task is open, the more urgent the task is, moving from Normal to Moderate to High, and finally becoming Overdue. Like priority, this field is color coded in the list view. |
| Short Description | A short description of the task. |
| Task Type | A field which specifies the type of task, and adds a child class to extend the record. For more, see [Tables and Classes](http://wiki.servicenow.com/index.php?title=Tables_and_Classes) |

# 3 Important Task Table Fields

The following table contains a list of important **Task [task]** fields:

| **Label** | **Name** | **Type** | **Description** |
| --- | --- | --- | --- |
| Active | active | boolean | Determines whether the task is active. Useful for filtering out tasks which are complete. The business rule **task reopener** sets the active flag to **True** if the state is changed from **Closed Skipped**, **Closed Incomplete**, or **Closed Complete** to any other state. |
| Additional comments | comments | journal\_input | Allows comments to be put on a record. Each comment is inserted into the **Activity** field. For more information, see [Journal Fields](http://wiki.servicenow.com/index.php?title=Task_Table#Journal_Fields) below. |
| Approval History | approval\_history | journal | Displays the history of approvals for the record. For more information, see [Approvals](http://wiki.servicenow.com/index.php?title=Task_Table#Approvals) below. |
| Assigned To | assigned\_to | reference | A reference to the User Table, to designate a user to complete the task. Has the [reference qualifier](http://wiki.servicenow.com/index.php?title=Reference_Qualifiers) **role=itil**, which allows only ITIL users to be assignable to tasks.  Both the **Service Order** and **Project Task** tables[override](http://wiki.servicenow.com/index.php?title=Dictionary_Overrides) this reference qualifier with a reference qualifier to filter [based on Skills](http://wiki.servicenow.com/index.php?title=Skills_Management_Plugin#Filtering_Potential_Assignees_Based_On_Skills). This reference qualifier can be applied to other pages. |
| Created | sys\_created\_on | glide\_date\_time | The date and time of the first submission for the task record. |
| Description | description | string | A multi-line string field, used for a description of the record's content. |
| Escalation | escalation | integer | An indicator of how long the task has been open. Escalations are dynamically populated using [Service Level Agreements](http://wiki.servicenow.com/index.php?title=Task_Table#Service_Levels). As the task is open for longer, it moves from Normal to Moderate to High, and finally becomes Overdue. When viewed in the Record List,[Field Styles](http://wiki.servicenow.com/index.php?title=Changing_Colors_or_Field_Styles" \o "Changing Colors or Field Styles) will color code the field by state of escalation. |
| Number | number | string | An identifying number for the task, which is used as the display value of the task. Numbers are generated automatically when the task is created. To modify the number generation, see [Number Maintenance](http://wiki.servicenow.com/index.php?title=Managing_Record_Numbering). |
| Opened | opened\_at | glide\_date\_time | The date and time when the task record is opened by a human for the first time. |
| Priority | priority | integer | A choice list which signals how high a priority the task should be for the assignee. The value is calculated based on **Impact** and **Urgency**, by the business rule**calculatePriority**. When viewed in the Record List,[Field Styles](http://wiki.servicenow.com/index.php?title=Changing_Colors_or_Field_Styles) will color code the field by degree of priority. |
| Short Description | short\_description | String | A short description of the task. Used as a human-readable title for the record. |
| State | state | Integer | A choice list for status of the task:   * Pending * Open * Work in Progress * Closed Complete * Closed Incomplete * Closed Skipped |
| Sys ID | sys\_id | GUID | The [Unique Record Identifier](http://wiki.servicenow.com/index.php?title=Unique_Record_Identifier) for all records. |
| Task Type | sys\_class\_name | sys\_class\_name | A field which specifies the type of task, and adds a child class to extend the record. Dynamically populated when the record is created on the child table. For more information on extending tables, see [Tables and Classes](http://wiki.servicenow.com/index.php?title=Tables_and_Classes). |
| Time Worked | time\_worked | timer | A timer which measures how long a record is open in the form view. For more information, see [Adding a Time Tracking Field](http://wiki.servicenow.com/index.php?title=Adding_a_Time_Tracking_Field). |
| Watch list | watch\_list | glide\_list | A list of users who will receive email notifications when the record is updated. **Note:** the watch list will only receive notifications if [Email Notifications](http://wiki.servicenow.com/index.php?title=Email_Notifications) are defined. For more information, see [Configuring Watch Lists](http://wiki.servicenow.com/index.php?title=Configuring_Watch_Lists). |
| Work notes | work\_notes | journal\_input | Allows comments to be put on a record, viewable only by ***itil*** users. Each comment is inserted into the**Activity** field. For more information, see [Journal Fields](http://wiki.servicenow.com/index.php?title=Task_Table#Journal_Fields), below. |

The Planned Task plugin provides a Planned Task [planned\_task] table that extends the Task [task] table. Planned tasks provide additional fields for tasks pertaining to time and effort as part of a planned, multi-stage process.

The Planned Task plugin is included with the [Project Management plugin](http://wiki.servicenow.com/index.php?title=Project_Management). The Project [pm\_project] table extends planned task, but any custom table can be created to extend Planned Task and leverage its fields.

# 4 Important Planned Task Table Fields

The following table contains a list of important Planned Task fields:

| **Label** | **Name** | **Type** | **Description** |
| --- | --- | --- | --- |
| Actual cost | work\_cost | currency | The actual cost of the planned task, to be compared with the **Estimated cost**. |
| Actual duration | work\_duration | glide\_duration | The actual length of time (from start time to end time) of work on the planned task, to be compared with the**Planned duration**. |
| Actual effort | work\_effort | glide\_duration | The actual time spent working, to be compared to the**Planned effort**. |
| Critical Path | critical\_path | boolean |  |
| Estimated cost | cost | currency | An estimation of the cost of the planned task, to be compared with the actual cost. |
| HTML Description | html\_description | html | A description field that accepts HTML mark-up. |
| Percent Complete | percent\_complete | decimal | A percentage of the completed effort. Generated using the **Planned effort** and **Actual effort** fields. |
| Planned duration | duration | glide\_duration | The estimated length of time (from start time to end time) of the planned task. |
| Planned effort | effort | glide\_duration | The estimated amount of time spent working on the planned task. |
| Planned end date | end\_date | glide\_date\_time | The estimated date and time for the planned task to end. |
| Planned start date | start\_date | glide\_date\_time | The estimated date and time for the planned task to start. |
| Remaining duration | remaining\_duration | glide\_duration | The difference in planned and actual duration, representing the time left for the planned task. |
| Remaining effort | remaining\_effort | glide\_duration | The difference in planned and actual effort, representing the amount of work time left for the planned task. |
| Rollup | rollup | boolean | Read-only field managed by the system that identifies the task as having child tasks. A rollup task will have a number of its fields calculated from the children so those fields will be read-only. |
| Time constraint | time\_constraint | string | A description of time constraints that apply to the planned task. |
| Top Task | top\_task | reference (planned\_task) | When different planned tasks are stacked in a hierarchy, this field populates with the highest-level parent task. For example, if Project A has a child Project B, and Project B has a child Project C, then Project C's **Top Task** is Project A. Project A's **Top Task** field will be blank. |

# 5 Planned Task Scripts

A number of business rules and one script include power the dynamic calculation of crucial Planned Task fields:

|  |  |
| --- | --- |
| **Business Rule** | **Description** |
| Set Actual Work Start Value | Sets the planned task's **Actual Start Date** when State is set to the default work state. |
| Set Close Data on Inactive | Sets the planned task's close data when task becomes inactive. |
| Recalculate | Recalculates the planned task schedule fields when one of the schedule fields changes. |
| Auto close milestones | Automatically closes milestones when they are passed. |

**1 Overview**

The time card management feature works with the Task table to record time worked on Projects, Incidents, Problems, and Change Requests. Task assignees can record time worked in the **Time worked** field on a task record or enter hours directly into their time card. Some tables support automatic time card creation based on start and end date fields.

Time cards also have an optional approval mechanism for project managers. Administrators and other roles that act as approvers can see all the time cards for the week. All users who are in a role that is responsible for working on tasks also can access their personal time cards. Time cards can have any of the following states.

* **Pending**
* **Approved**
* **Submitted**
* **Rejected**

|  |  |
| --- | --- |
| [Note](http://wiki.servicenow.com/index.php?title=File:Warning.gif) | **Note:** *The*[*Time card management*](http://wiki.servicenow.com/index.php?title=Time_Cards#Activating_Time_Card_Management)*plugin is required to use time cards. Some of the procedures on this page require the*[*project management*](http://wiki.servicenow.com/index.php?title=Project_Management)*feature, which activates time cards automatically.* |

**2 Recording Time Worked**

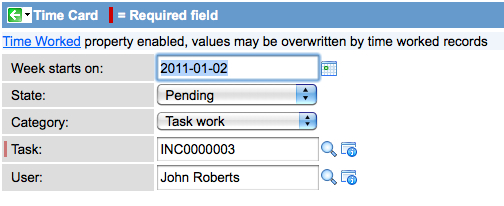
Time accrued on a project or spent working on any record in the Task table is retrieved by the time card from the **Time worked** field. This field is present on Project Task records by default, but does not appear on the Incident, Problem, and Change forms and must be added by [configuring](http://wiki.servicenow.com/index.php?title=Configuring_Forms#Configuring_Forms) the form. Time recorded in this field is used to populate an existing time card or to create a new time card if one does not already exist. This behavior is controlled by a time card [**property**](http://wiki.servicenow.com/index.php?title=Time_Cards#Properties). The **Time worked** field has a counter that acts like a stopwatch for the duration of the time spent in the record. The counter can be stopped and started by a button in the field. By default, the **Time worked** counter is enabled and begins recording the elapsed time when the record is opened. Stop the counter with the red stop sign button and restart it with the green *play* button.

Time counter started:

[Time_Worked_Started.png](http://wiki.servicenow.com/index.php?title=File:Time_Worked_Started.png)

Time counter stopped:

[Time_Worked_Stopped.png](http://wiki.servicenow.com/index.php?title=File:Time_Worked_Stopped.png)

If you are creating time cards from time worked entries, you can add the [related list](http://wiki.servicenow.com/index.php?title=Using_Related_Lists) to display the time worked records on the time card form.  
You will also notice an informational message on the time card to let you know that changes to time worked records will override values in the time card. This is displayed using a [formatter](http://wiki.servicenow.com/index.php?title=Creating_a_Formatter), which can be added or removed by configuring the form.   
[](http://wiki.servicenow.com/index.php?title=File:Time_worked_notice.jpg)

## 2.3 Managing Time Cards

The **My Time Cards > Current** module presents a page showing all of your time cards for the current week. There is also a control to **Generate Task Cards**. This button will search for all [planned tasks](http://wiki.servicenow.com/index.php?title=Planned_Task_Plugin) that are scheduled for the current time card period, if you don't already have a time card for the task.

# 3 Properties

Users with the timecard\_admin role can set time card properties by navigating to **Time Cards > Administration > Properties**.

|  |  |  |
| --- | --- | --- |
| **Name** | **Description** | **Default** |
| com.snc.time\_card.autocreate | Auto-create a user's time card when they update a task | No |
| com.snc.time\_card.time\_worked | Auto-fill a user's time card with time from their 'Time worked' entries | No |
| com.snc.time\_card.update.effort | Update the task's 'Actual effort' based on the hours entered in the time card | No |
| com.snc.time\_card.update.resource | Update the project/user's resource allocation record based on the hours entered in the time card | No |
| com.snc.time\_card.start\_day | What day should time cards start on, default is Sunday. Changing this value may create duplicate time cards for the week of the change, since time card queries are based on this value. | Sunday |

# 4 Managing Costs

When the [cost management](http://wiki.servicenow.com/index.php?title=Cost_Management) feature is enabled, time cards can be used to manage the cost of labor in the **Financial Management** application.

When a time card is marked **Approved**, the user's rate (listed in the **Labor Rate Card**) is used to generate a one-time Expense Line for the time worked. If no Labor Rate Cards apply to the user, the property **com.snc.time\_card.default\_rate** defines a default rate.

# 5 Roles

The timecard\_admin role enables users to approve, modify, and delete the time cards of other users.