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# Lab Guide

## Visual Task Boards:

## Interact with Work More Efficiently

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# Lab Goal

This lab explains the different types of Visual Task Boards (VTB)—Freeform, Flexible and Guided—and under which circumstances to consider using each.

It also explains how to create and name VTBs, either from an existing set of tasks, or from scratch.

**Lab 1**
**Create Visual Task Boards**

## Types of Visual Task Boards

There are three types of Visual Task Boards, Freeform, Flexible and Guided. The type you use depends on the type of tasks you intend to work with and how you envision interacting with them.

**Freeform Boards**, as the name suggests, allow you to work with any type of task; and create, name and arrange lanes however you please. Updates to task records are reflected on the platform; but lane changes are not. Freeform Boards are great for planning purposes, simple projects and personal to-do lists. By default, adding a task from a Freeform Board creates a Personal Task.

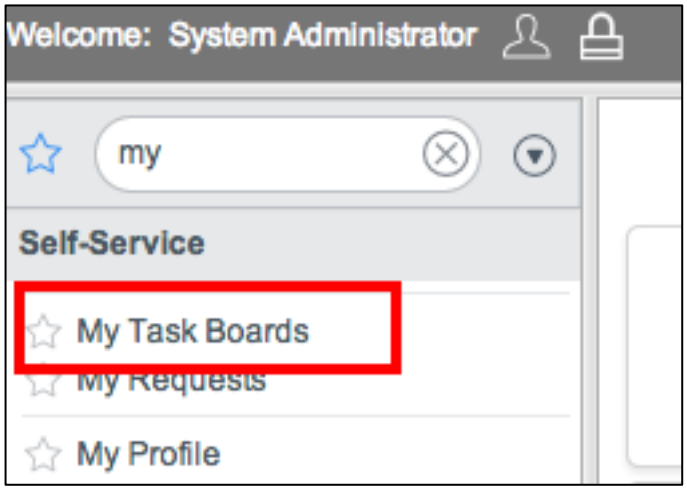
**Flexible Boards** are created from the column menu of a non-choice field, such as **Number** or **Short Description**. Use a Flexible Board when you want to visualize existing task records, but want to use specialized values for lane names. Updates to task records are reflected on the platform; but lane changes are not. By default, adding a task from a Flexible Board creates a task of the same type used to create the board originally.

**Guided Boards** are created from the column menu from a choice or reference field, such as **State** or **Assigned To**. Lane change on Guided Boards do impact task record data; so they are great for visualizing work in relation to critical parameters like state, priority and assignee. By default, adding a task from a Flexible Board creates a task of the same type used to create the board originally.

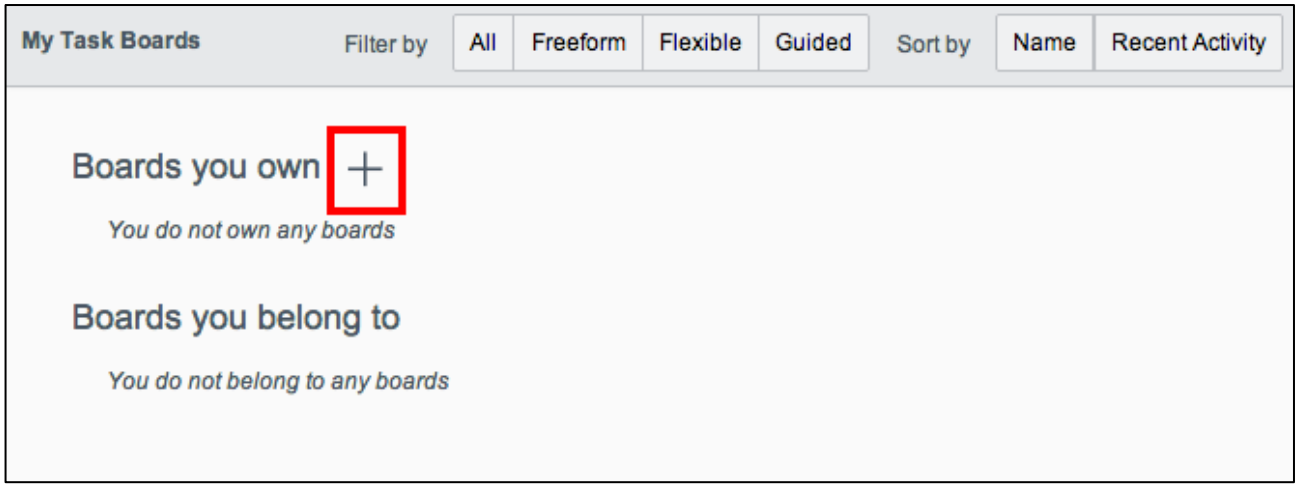
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## Create a Freeform Board

1. Navigate to Self Service > My Task Boards.

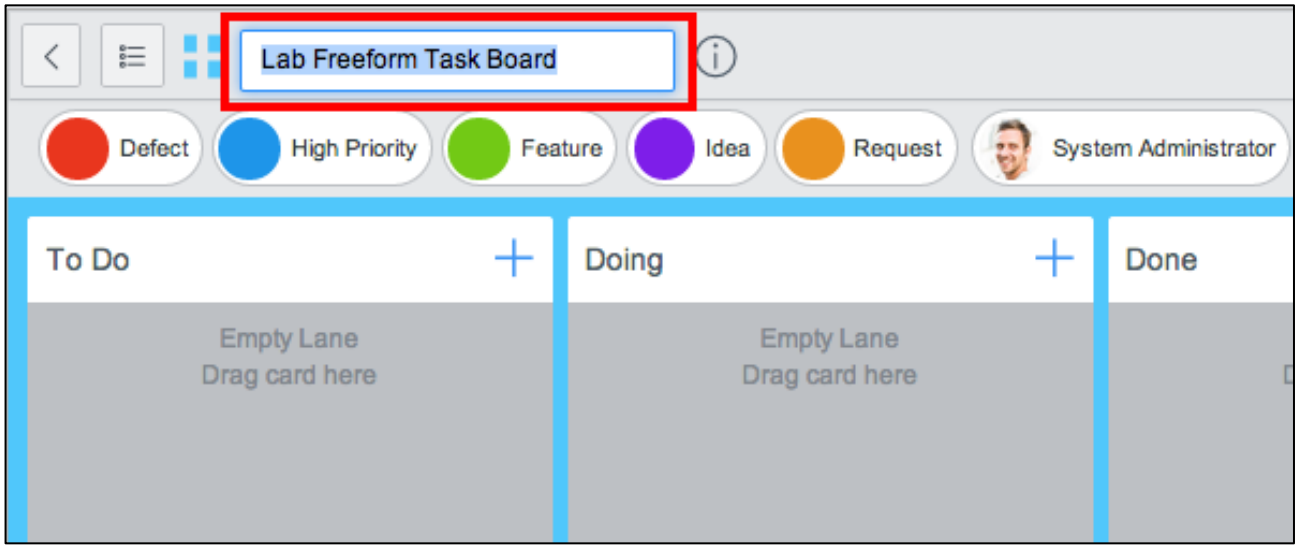



2. Add icon next to Boards You Own.

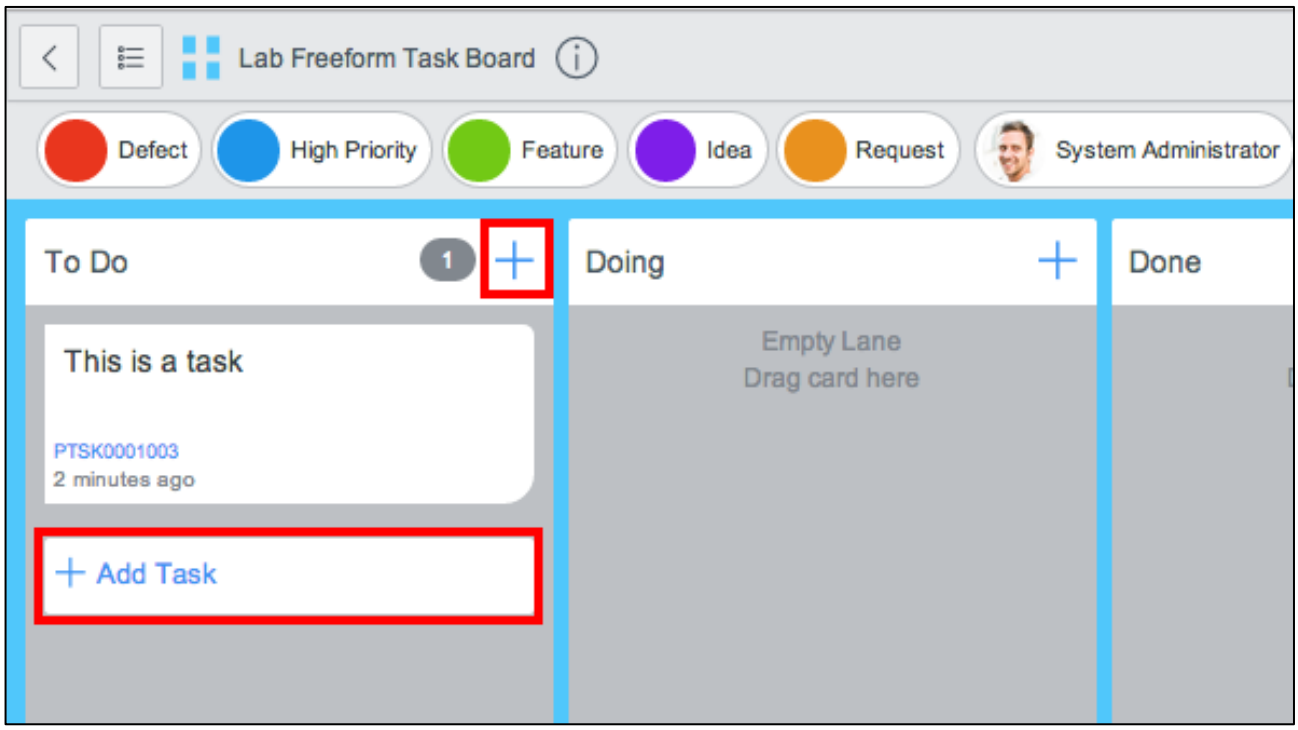



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3. Click the default title to Rename **the** board.




4. Click **Add Task** to create a task within a particular lane.

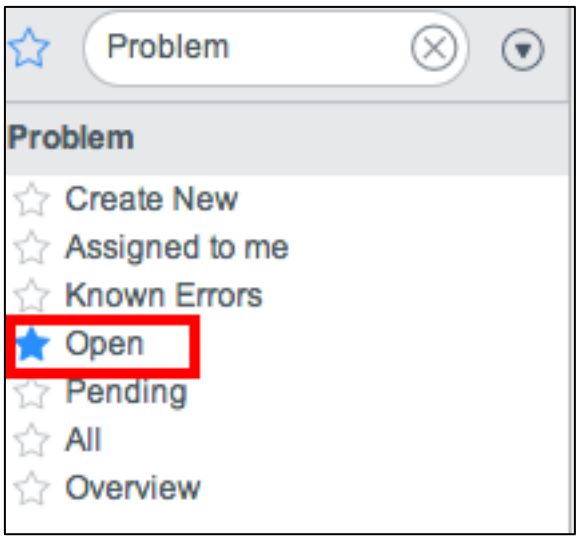



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## Create a Flexible Board

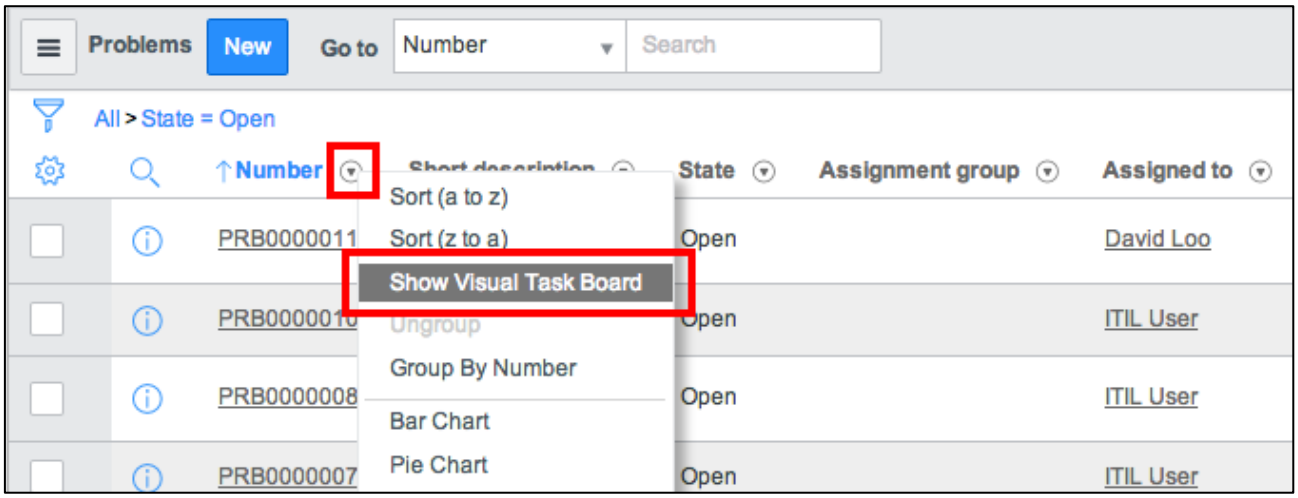
In this case, assume you want to visualize open Problems, but want to arrange them in a temporary, informal workflow.

1. Navigate to **Problem > Open**.




2. Click the Column Heading for the **Number** column.

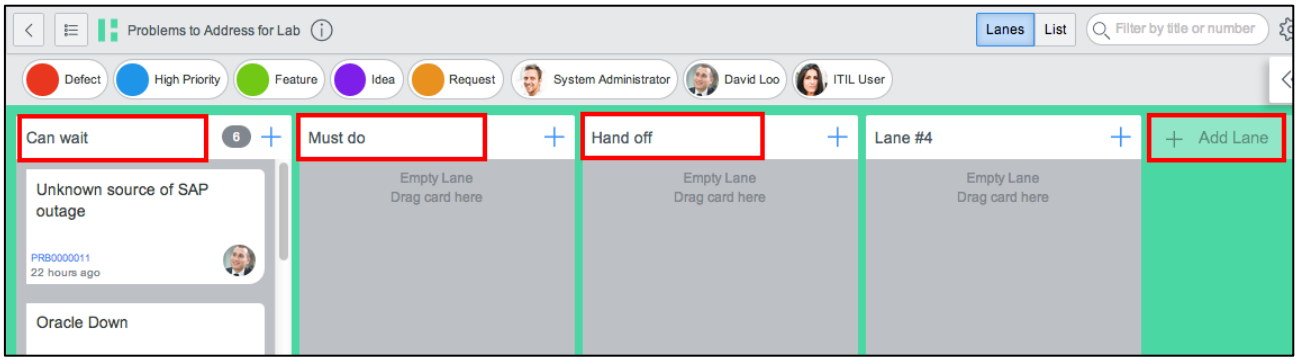
3. Select **Show Visual Task Board**.




4. Click **Lane Headings** to Edit lane names.

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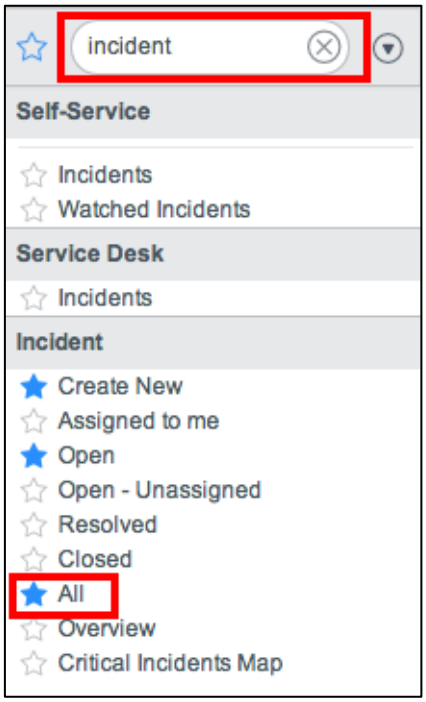
5. Click **Add Lane** to introduce new lanes to the board.




## Create a Guided Board

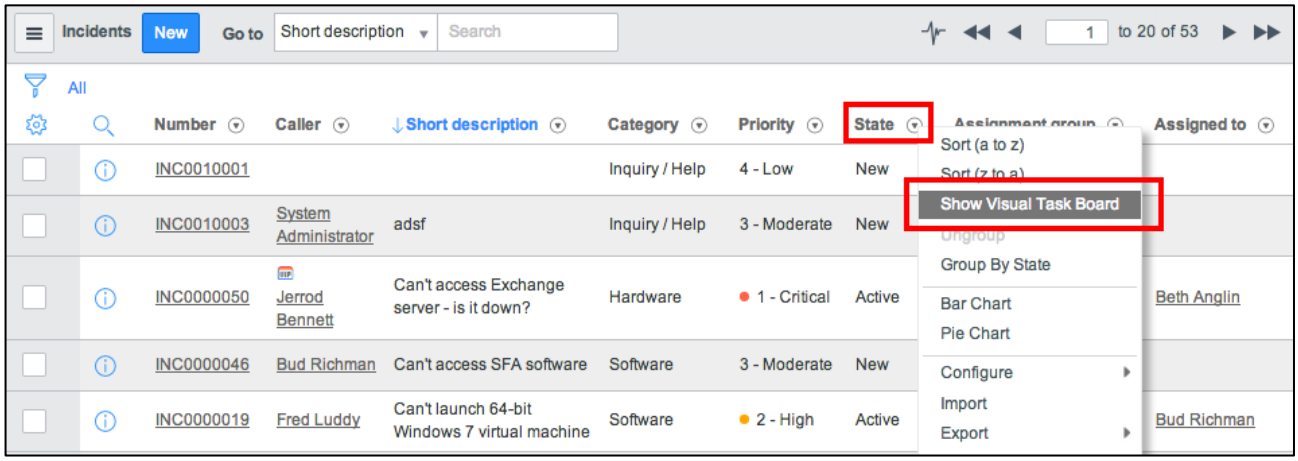
In this case, assume you want to visualize all Incidents, arranged by current State.

1. Navigate to **Incident > All**.

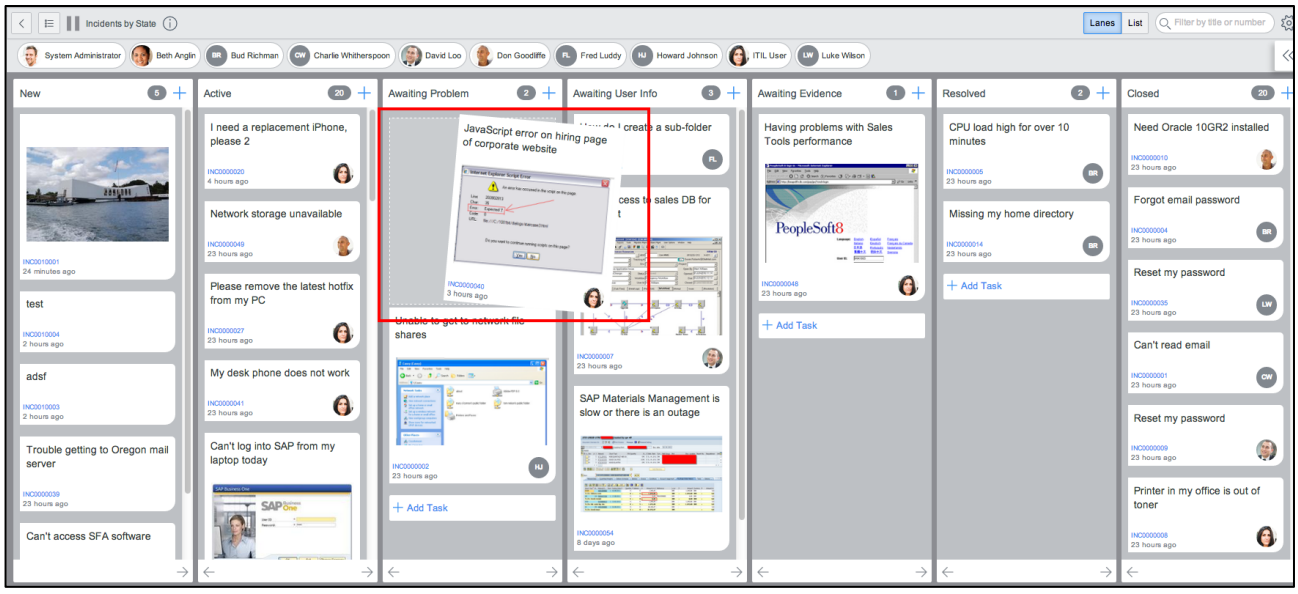



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2. Click the Column Heading for the **State** column and select **Show Visual Task Board**.




3. **Click and Hold** any card to **drag and drop** it on another lane. Because this is a Guided Board, doing so changes the State value of the task accordingly.




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# Lab Goal

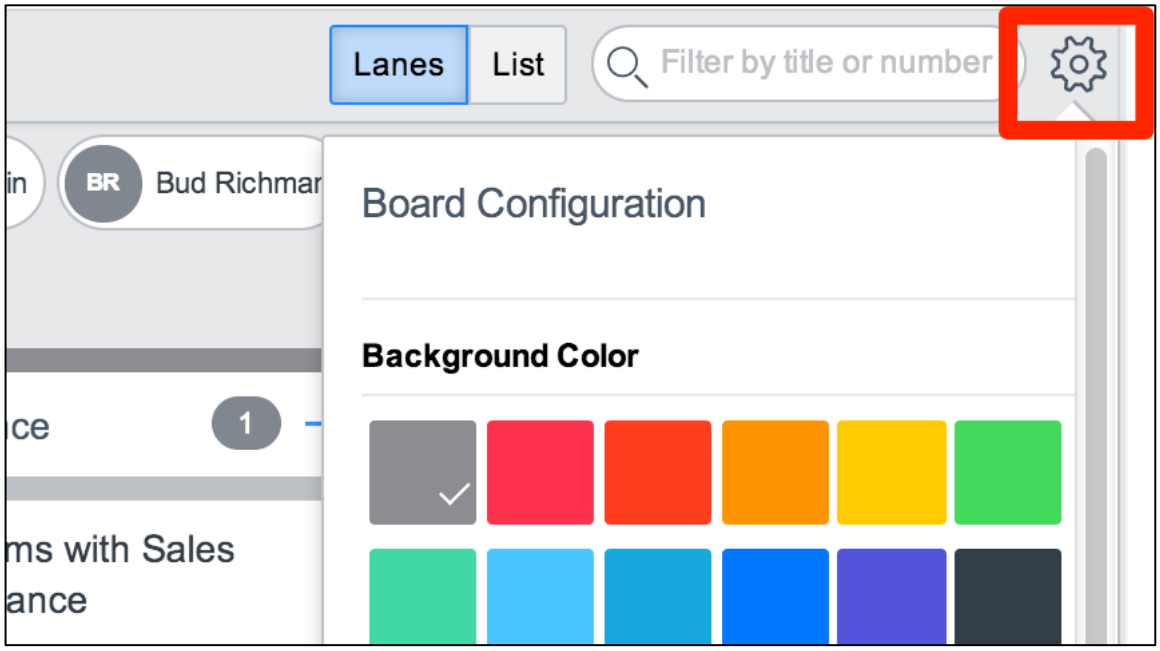
This lab explains how to configure the Visual Task Board preference options to best suit your needs.

Use this opportunity to experiment with the variety of configuration controls.

**Lab 2**
**Configure Visual Task Boards**

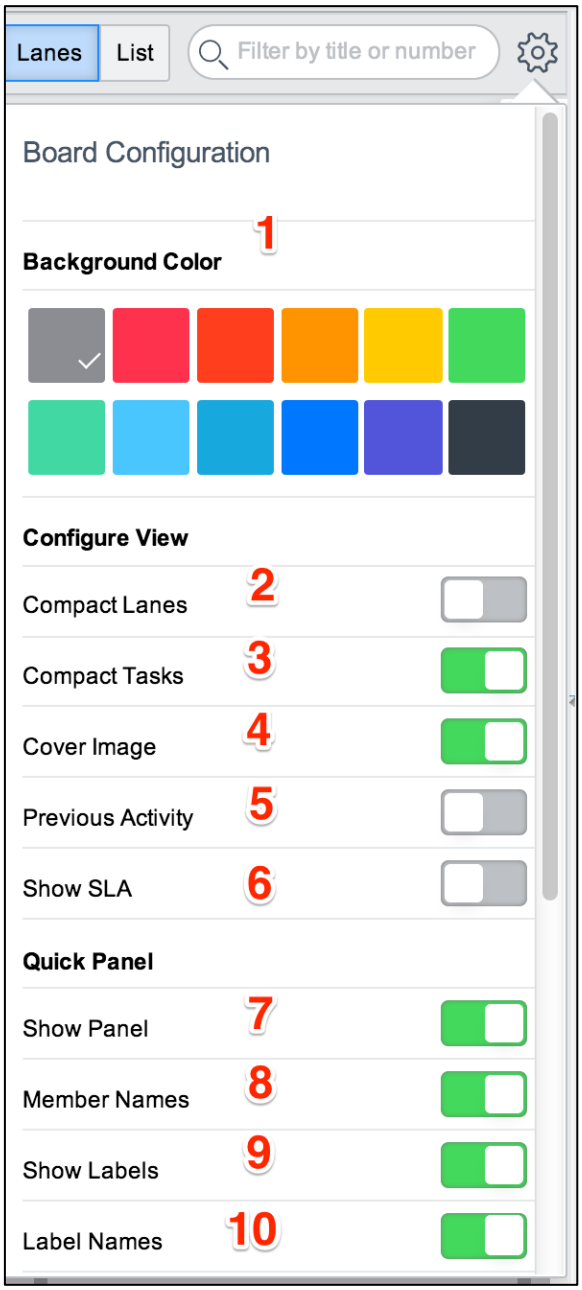
## Board Configuration Panel

1. Click the **cog** in the upper right to open the **Board Configuration Panel**.




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2. Use this opportunity to get familiar with the board's configuration settings.




1. Change board background color
2. See more lanes in less horizontal space
3. See more task cards in less vertical space
4. Include attachment thumbnails on cards
5. Include the previous value in record update events in Activity Stream (e.g., Description changed to "Do all work" *was "Do some work")*
6. Show SLA progress bar on task cards
7. Show horizontal "Quick Panel" at the top of the task board
8. Include full names of members and assignees in the Quick Panel
9. Show labels in the Quick Panel
10. Include label names in the Quick Panel

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# Lab Goal

This lab explains the features housed in the Visual Task Boards **Sidebar**.

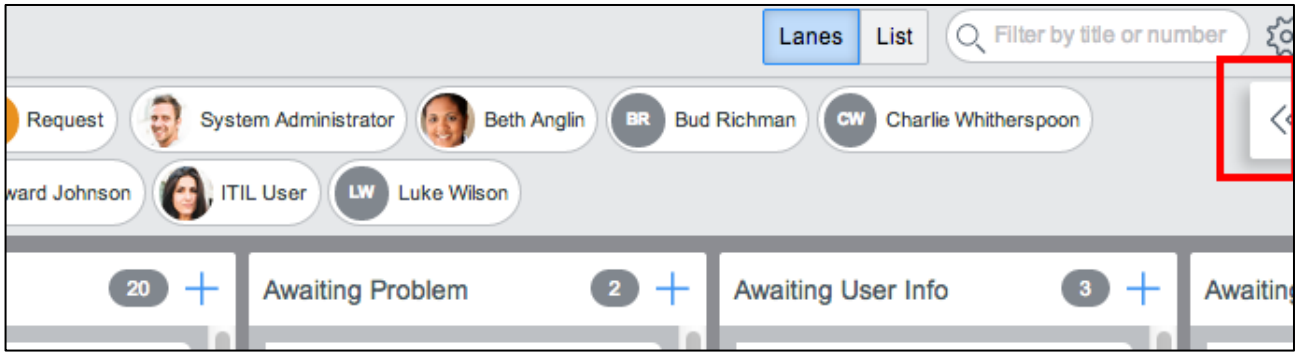
From the VTB Sidebar you can:

- Review recent board activity
- Manage members – people you permit to view and interact with your board
- Manage labels – used to efficiently categorize and filter tasks on your board

**Lab 3 Use the Sidebar**

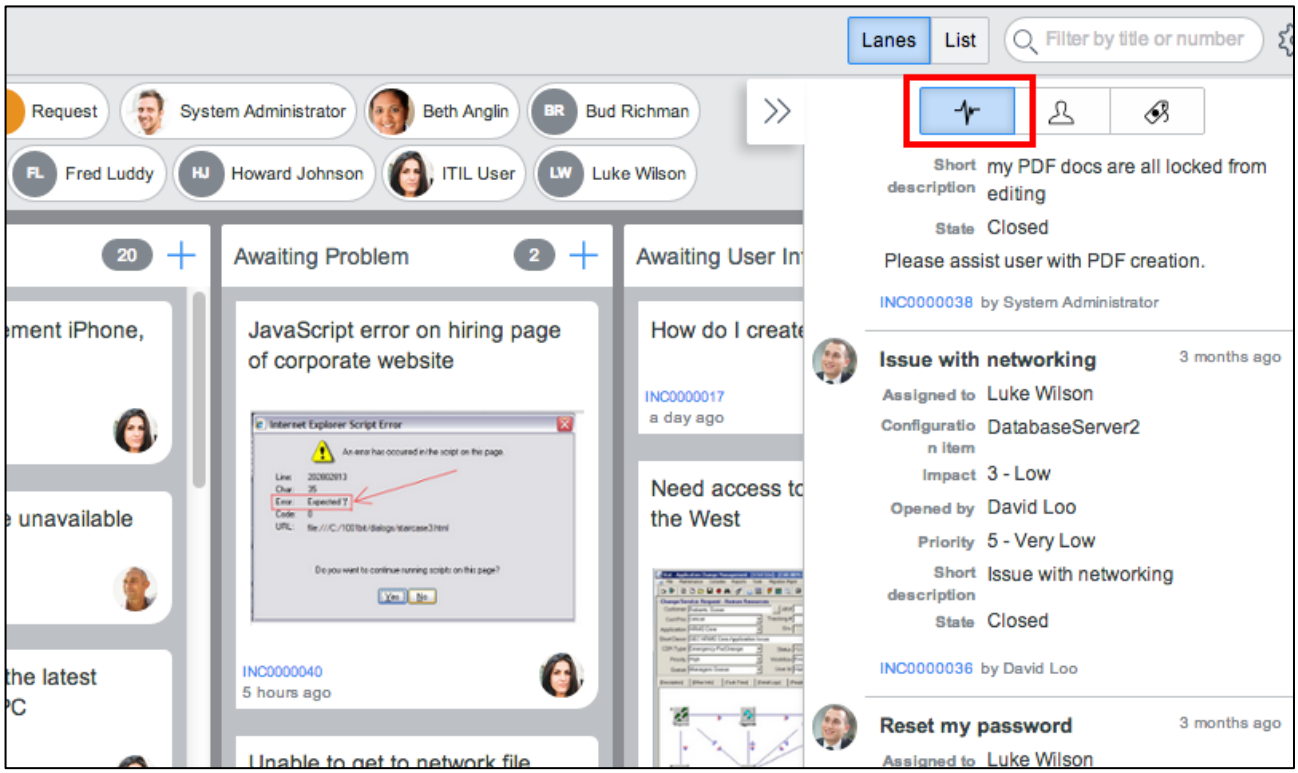
## Activity Stream

1. First, click the Sidebar Tab, upper right, to expose the VTB Sidebar.




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2. **Select** the **Activity Stream** icon on the Sidebar controller. Notice the your activity stream includes task event history prior to the creation of your board.



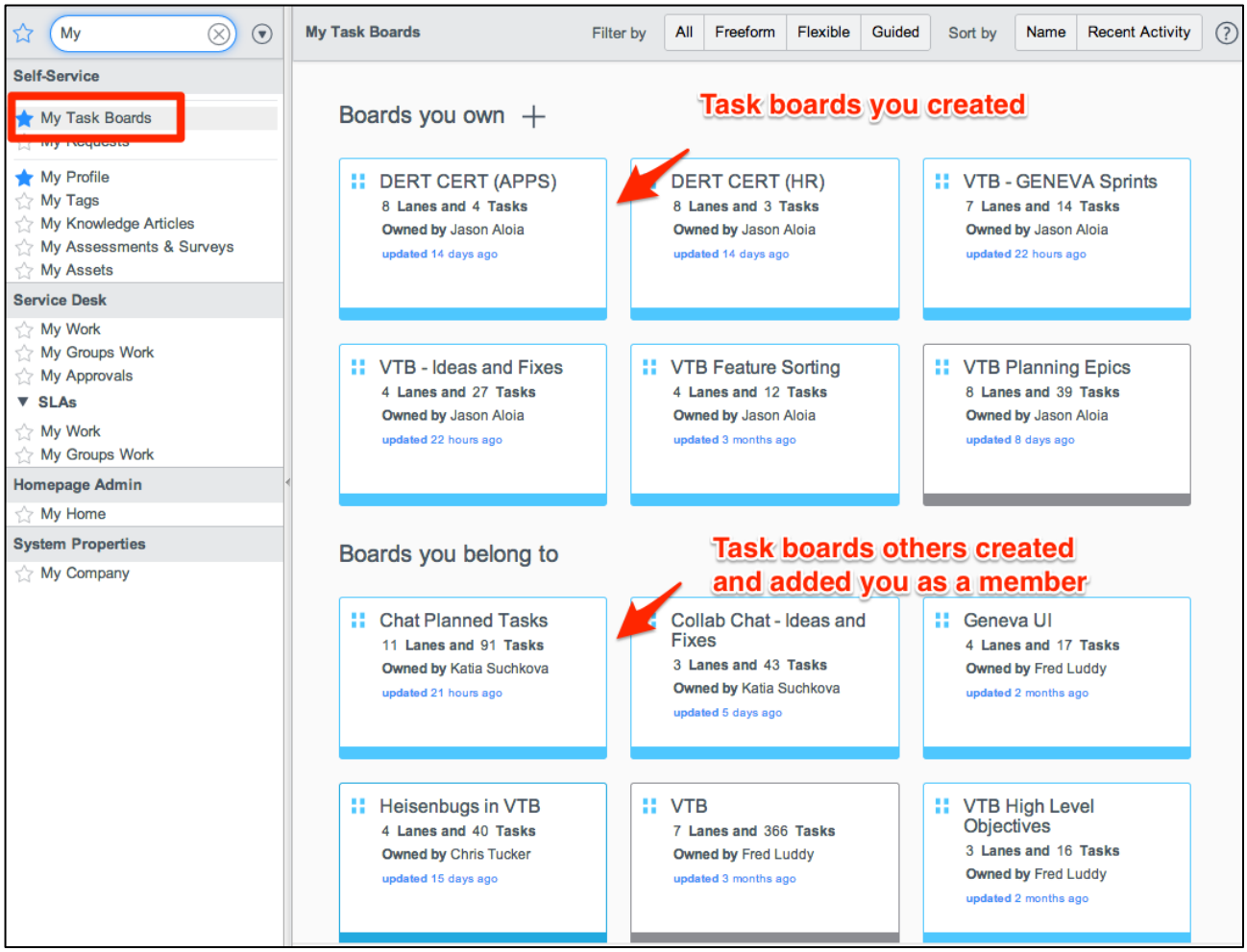

3. **Edit** or **Change** the lane of any task on the board and witness the Activity Stream update every few seconds.

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## Manage Members

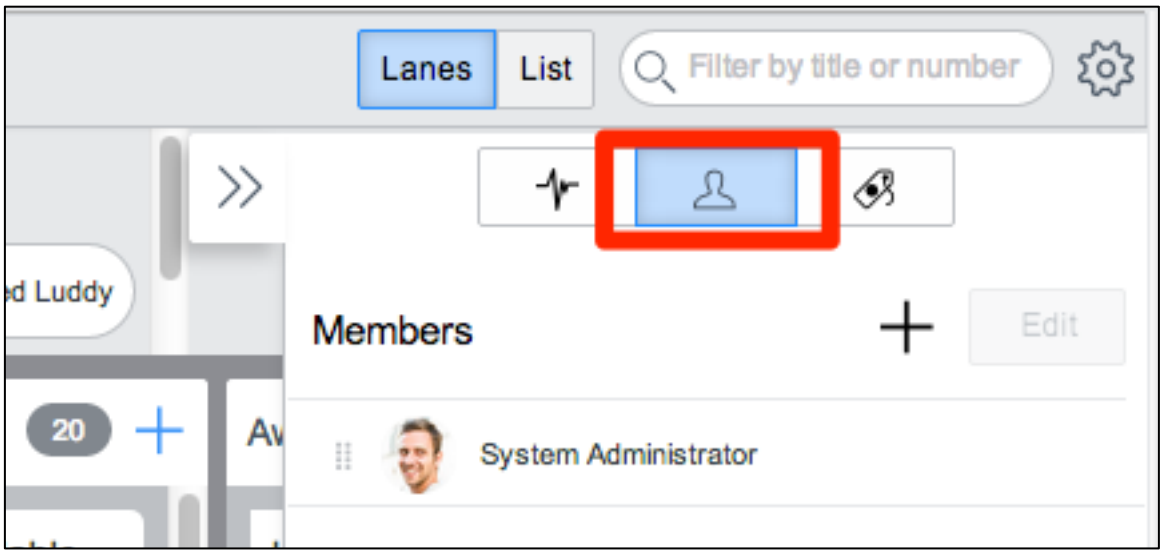
Add members to the Visual Task Board. All task board members enjoy full read-write permission to your VTB. To other members, the board appears under **Boards you belong to** on **My Task Boards**.

1. First, click the Sidebar Tab, upper right, to expose the VTB Sidebar.



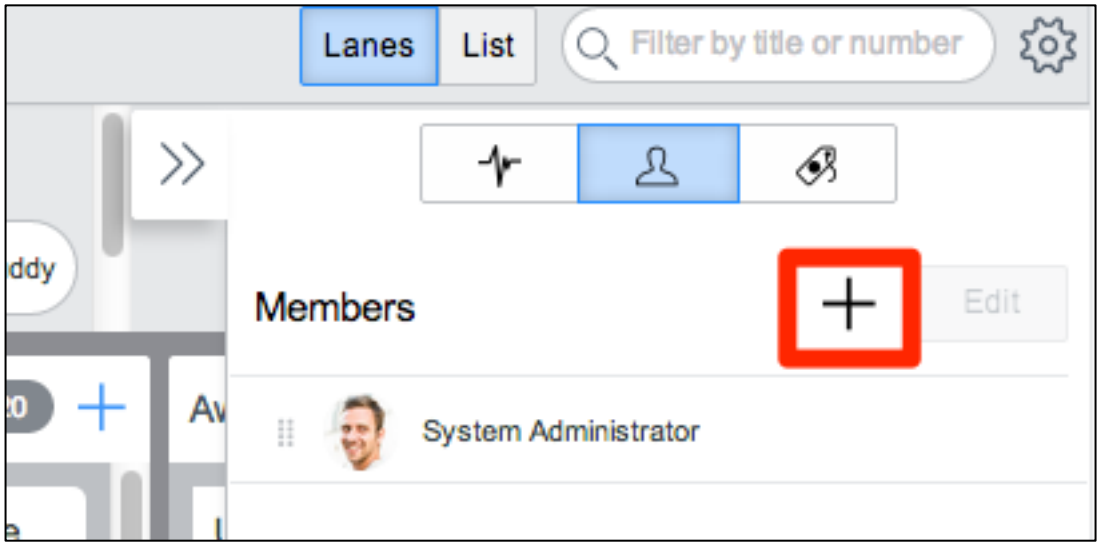

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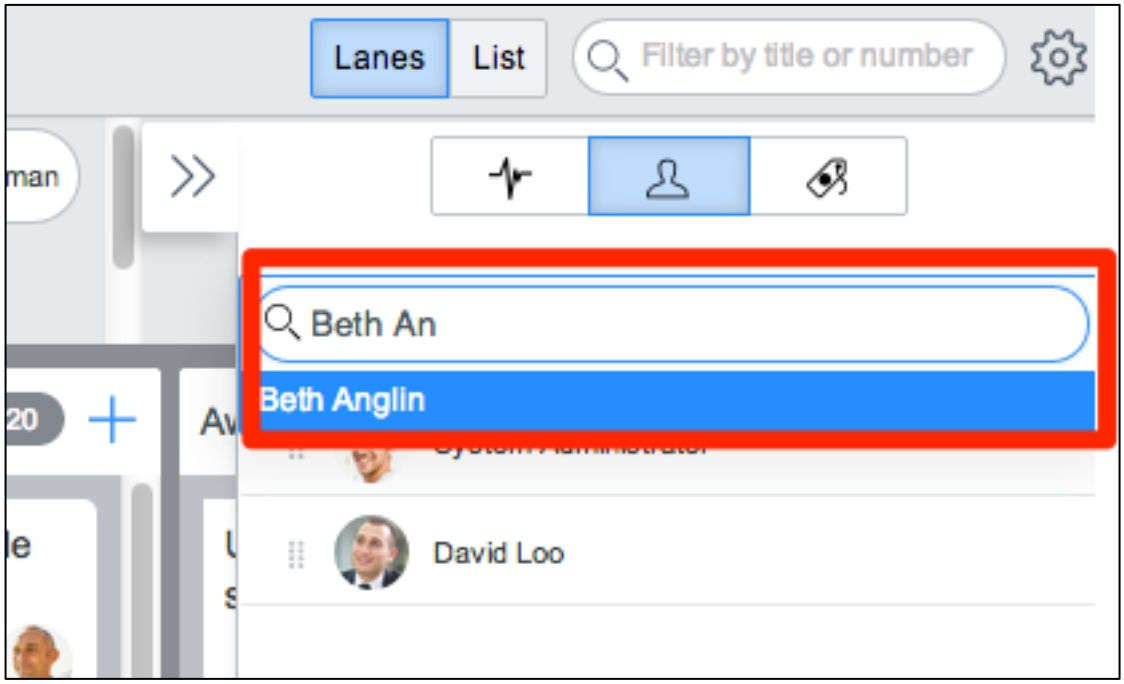
2. Enter a task board; open the **Sidebar** and **click Member** control option.




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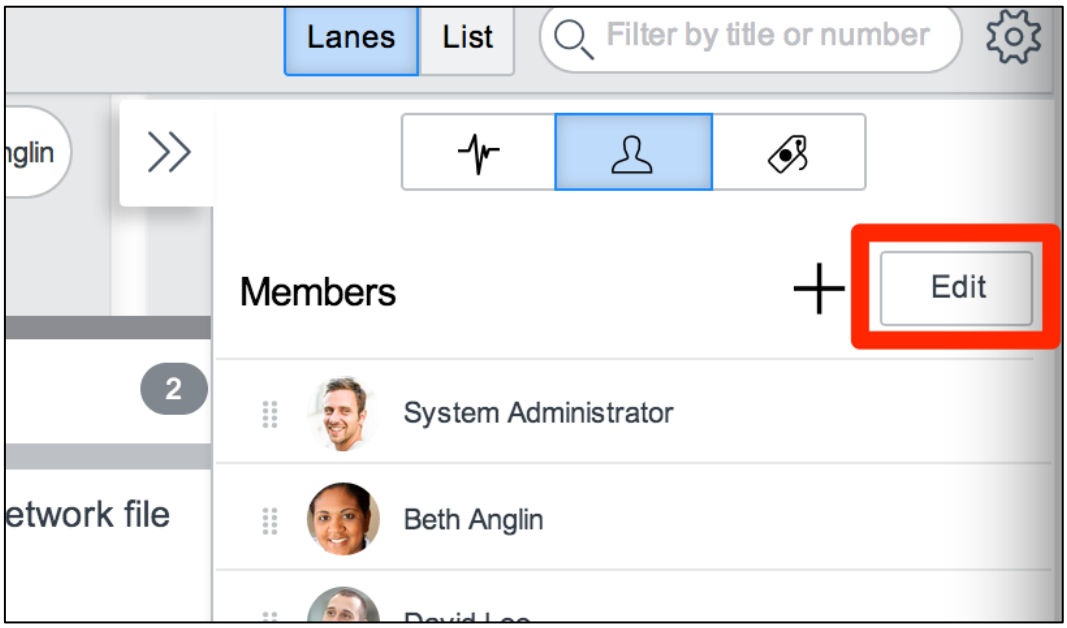
3. Click the **Add Icon ( + )**; search for and select **David Loo** and **Beth Anglin**.



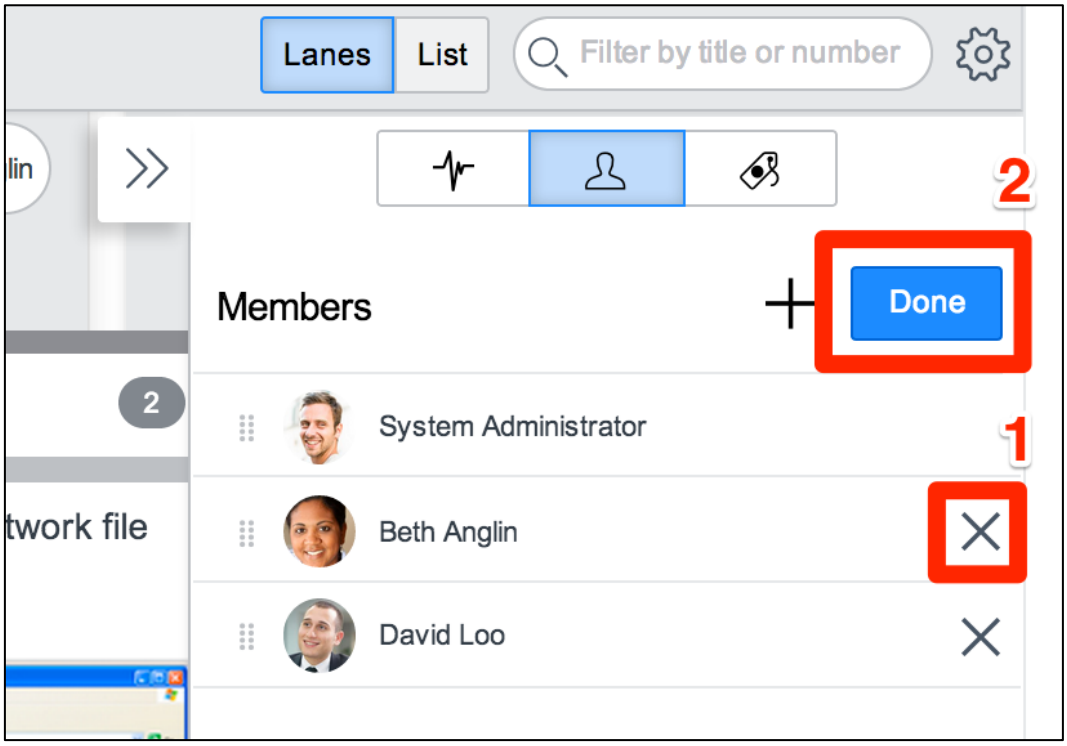




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4. Remove **Beth Anglin** as a member by clicking **Edit**.




5. Click the **Delete Icon (X)** on Beth's member record followed by **Done**.

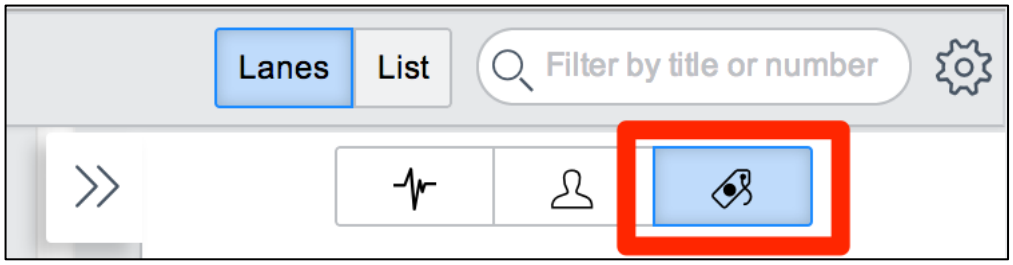



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## Manage Labels

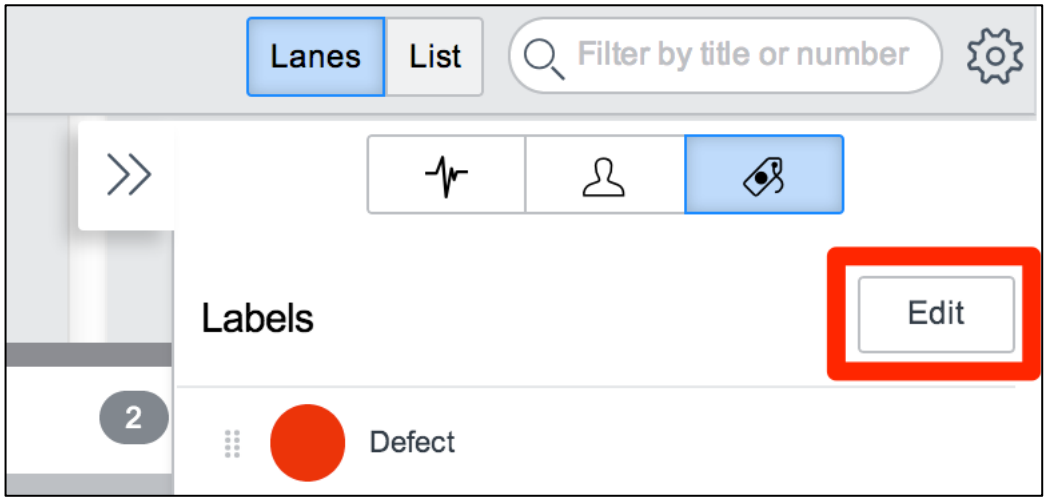
All Visual Task Boards are generated with a default set of five (5) **Labels**, which make categorization and filtering of tasks quick and easy.

1. From the open Sidebar, click **Label** control option.



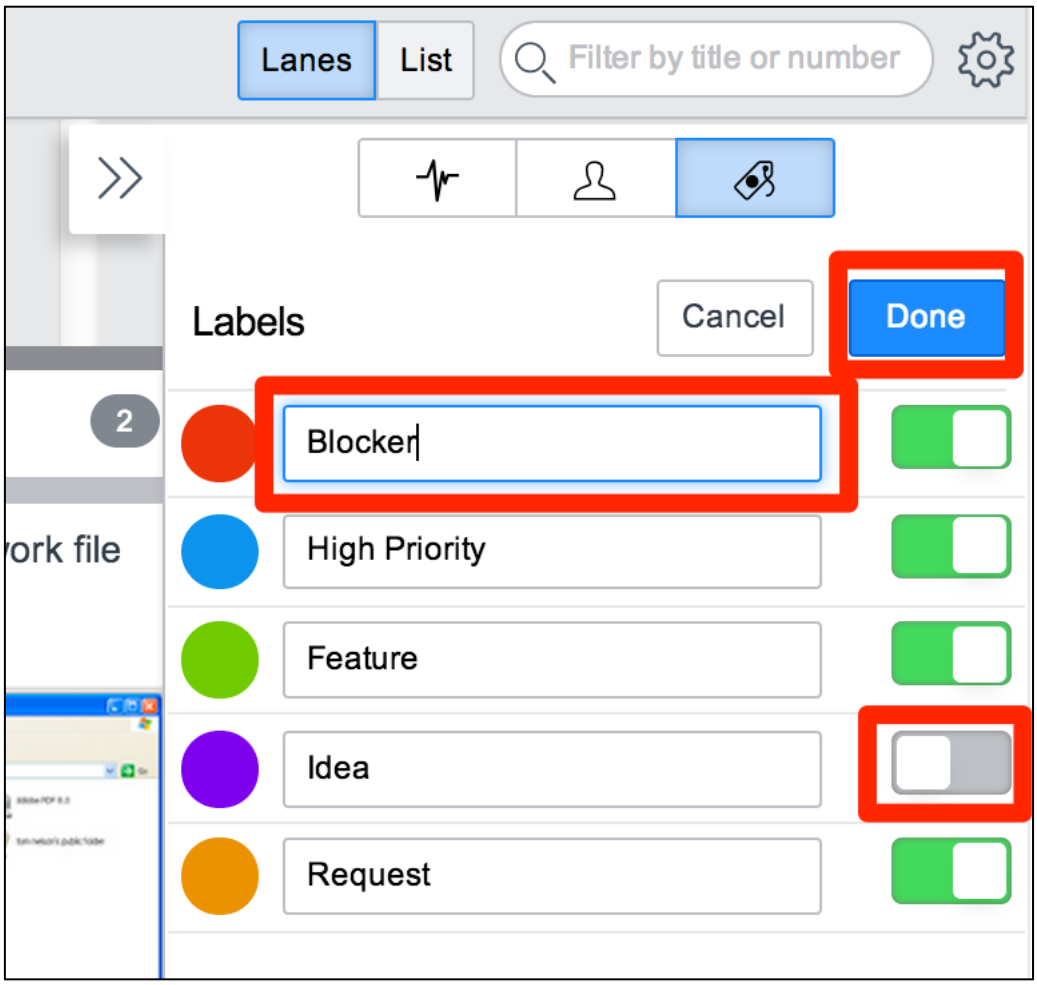

**Note**: If you see a message that reads "Labels are currently turned off," turn them off at **Board Configuration > Show Labels** (covered in Lab 2).

2. To modify the labels, click **Edit**.




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3. Edit label **names** and click a switch to enable/disable individual labels.




4. Click **Done** when finished.

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# Lab Goal

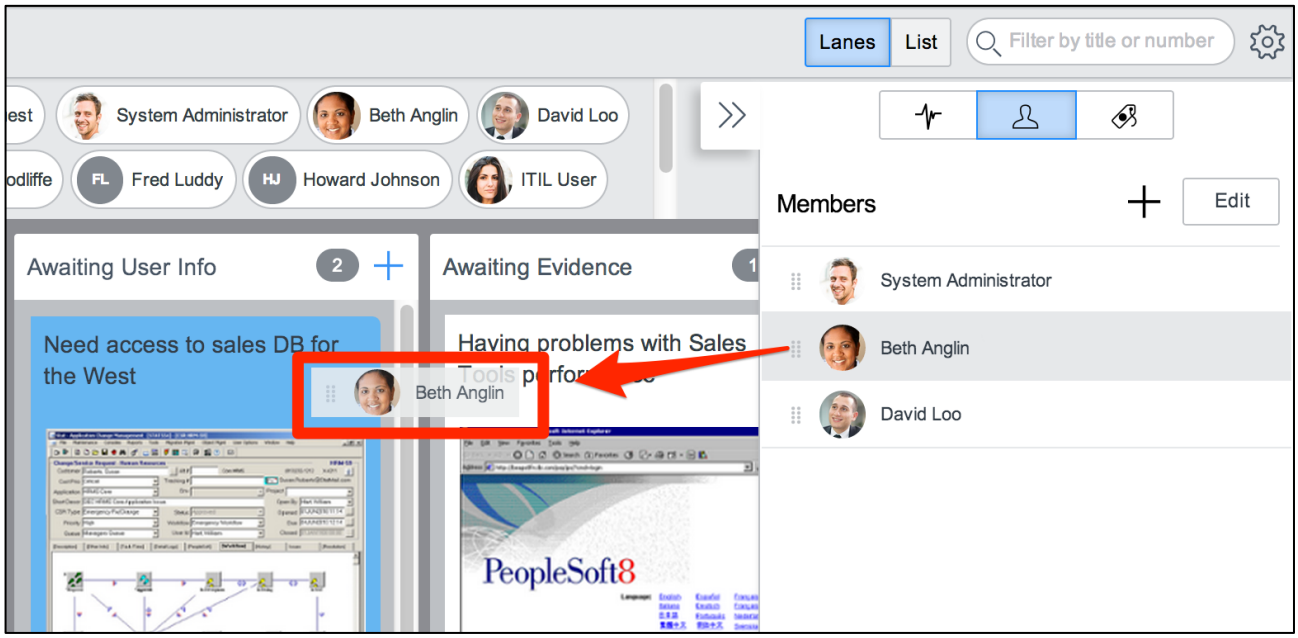
This lab explains how to perform the following from the Virtual Task Board sidebar:

- Assign members to tasks
- Filter task cards by assigned member
- Assign labels to tasks
- Filter task cards by label

**Lab 3.1 Sidebar Interactions**

## Assign Members to Tasks from the Sidebar

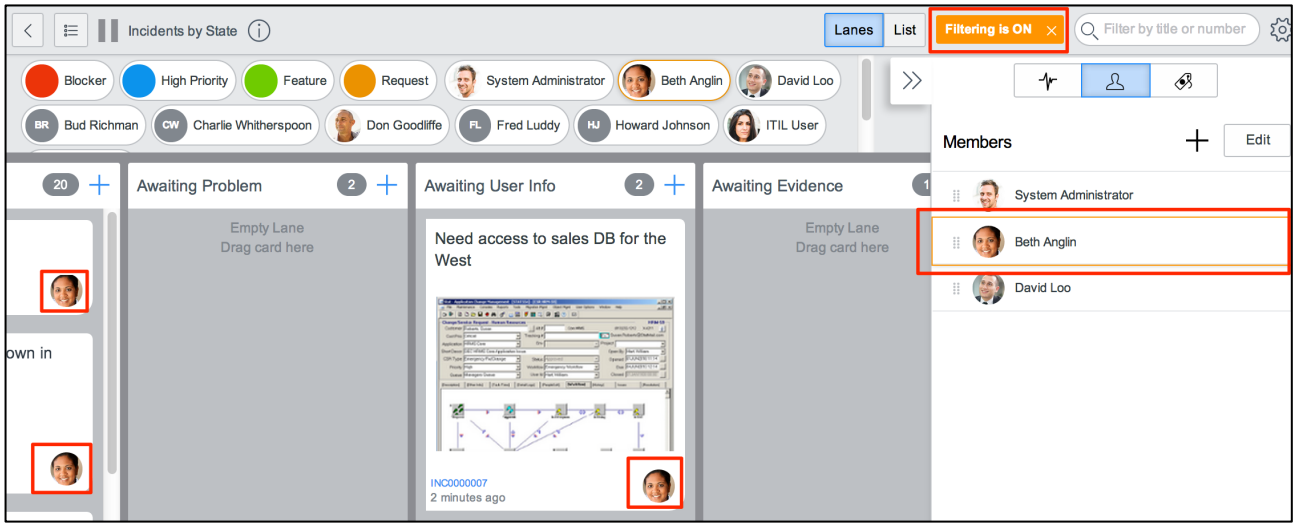
1. Open the Sidebar and click the **Member** control option.
2. Click, hold, drag and drop member name onto a task card.



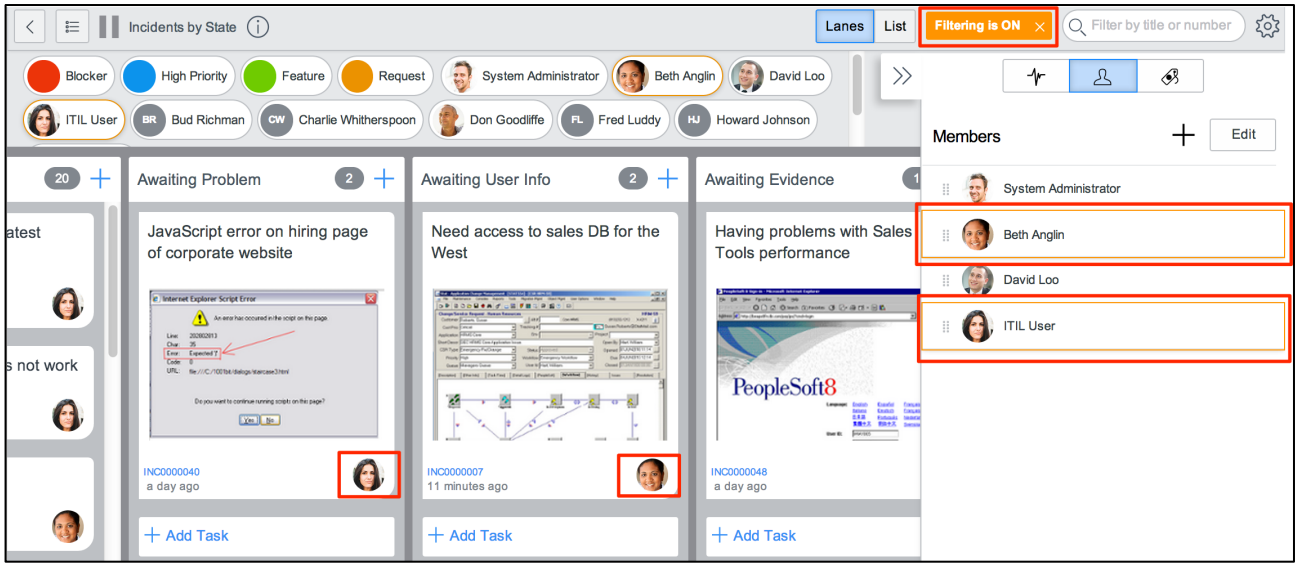

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## Filter Task Cards by Member from the Sidebar

1. Click **Member** to filter board.




2. Click another Member to include task cards assigned to another assignee.

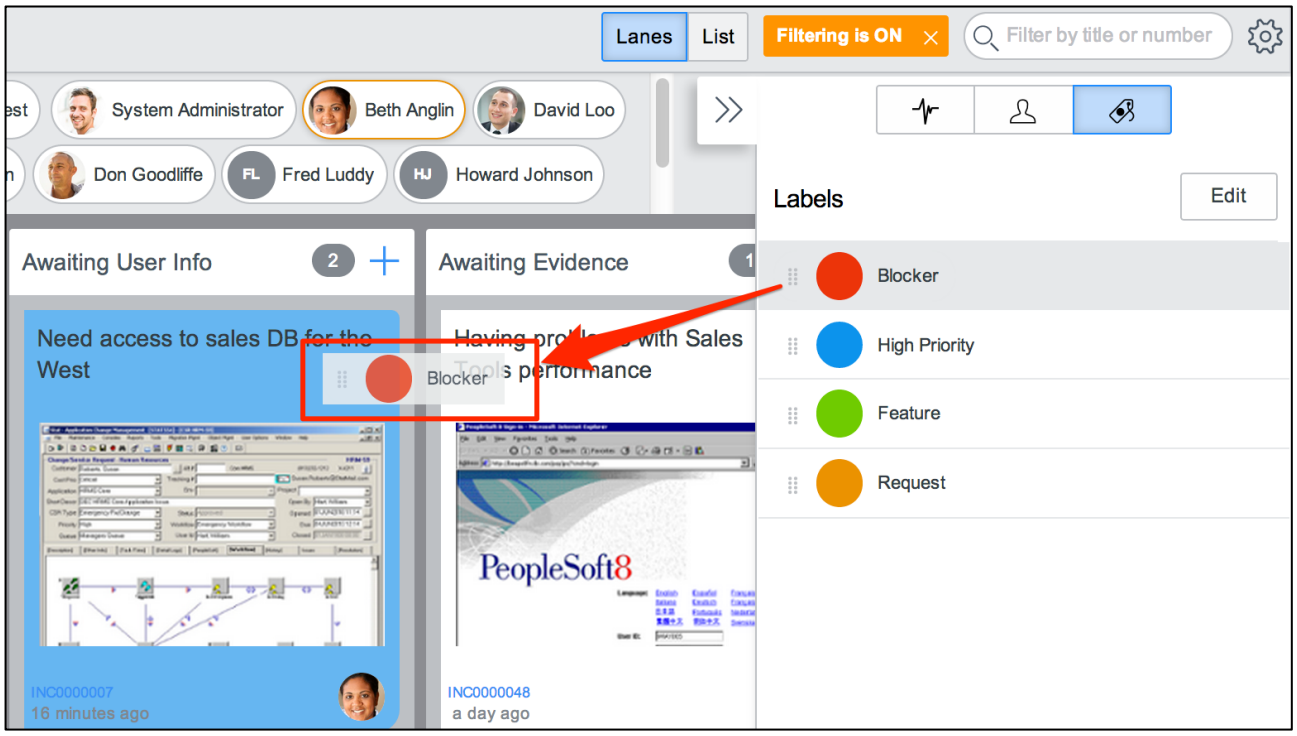



3. Click **Member** to remove individual filter value; or click [**X**] on **Filtering is On** indicator to remove all filter parameters and restore board content.

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## Assign Labels to Tasks from the Sidebar

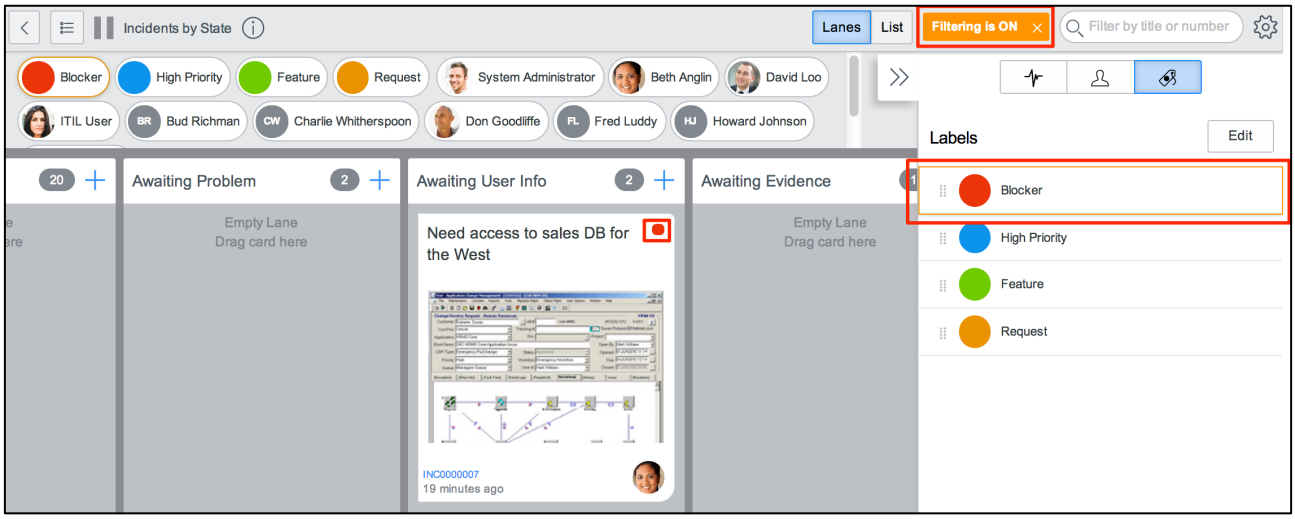
1. Open the Sidebar and click the **Label** control option.
2. Click, hold, drag and drop label onto a task card.




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## Filter Task Cards by Label from the Sidebar

1. Click **Label** to filter board.




2. Click **Label** to remove individual filter value; or click [**X**] on **Filtering is On** indicator to remove all filter parameters and restore board content.

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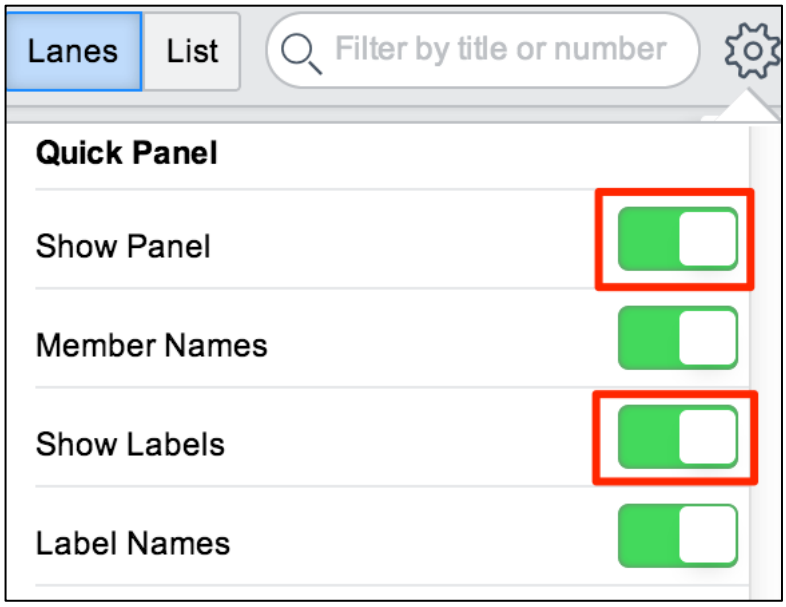
# Lab Goal

This lab explains how to perform the following from the Virtual Task Board Quick Panel:

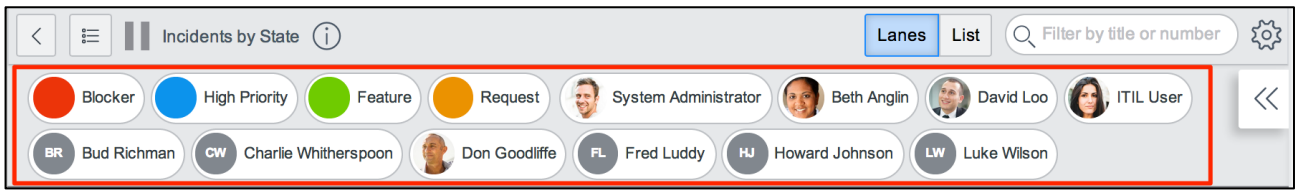
- Assign members to tasks
- Filter task cards by assigned member
- Assign labels to tasks
- Filter task cards by label

**Lab 4**
**Quick Panel Interactions**

1. First, be sure **Show Panel** and **Show Labels** are turned **ON** in the board configuration settings.

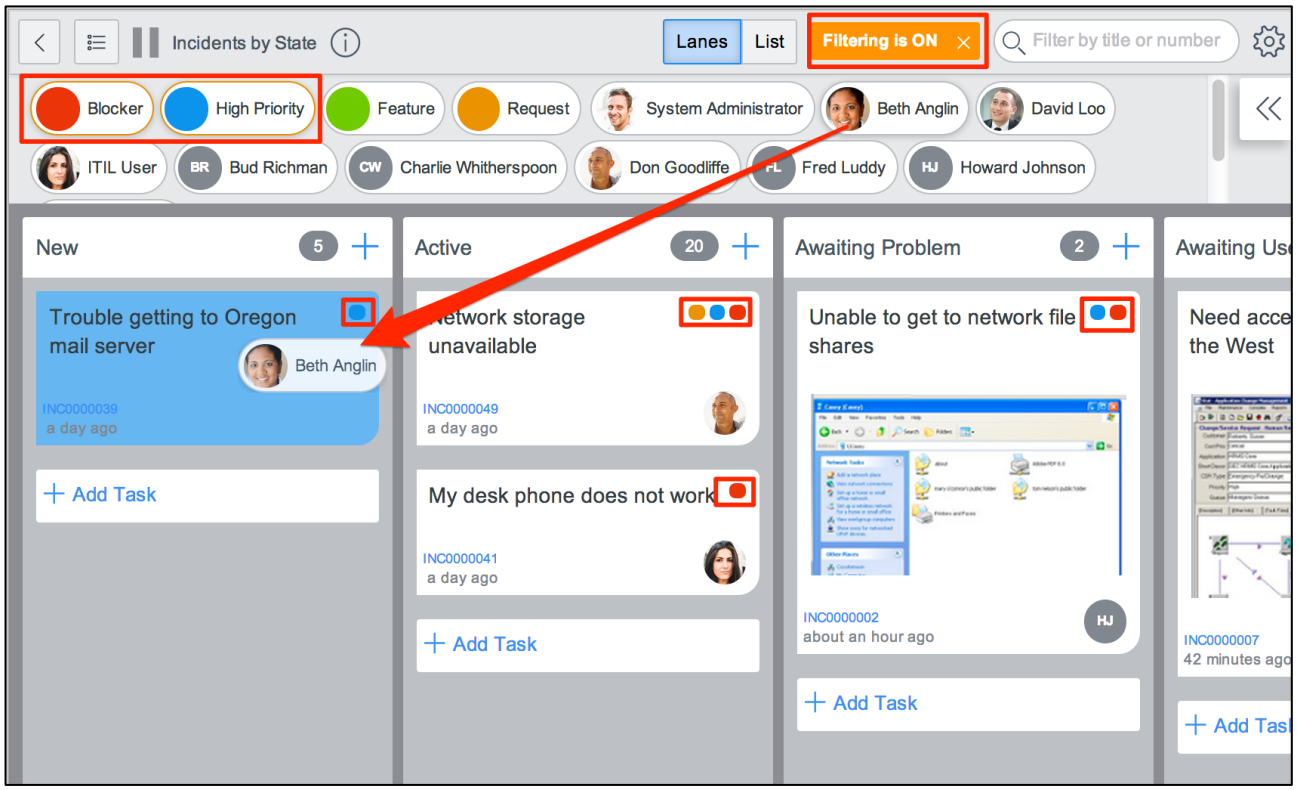



2. Find available **Members,** Assi**gnees and L**abels within the Quick Panel.




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3. Similar to the sidebar, Filter by clicking and Assign by drag-dropping values from the Quick Panel onto task cards.




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# Lab Goal

This lab explains how to interact with task records from Visual Task Boards, including:

**Lab 5**
**Interact with Tasks**

## Move Cards

You can rearrange the task cards of the board however you like. But be aware of what, if any, impact these actions have on the task data.

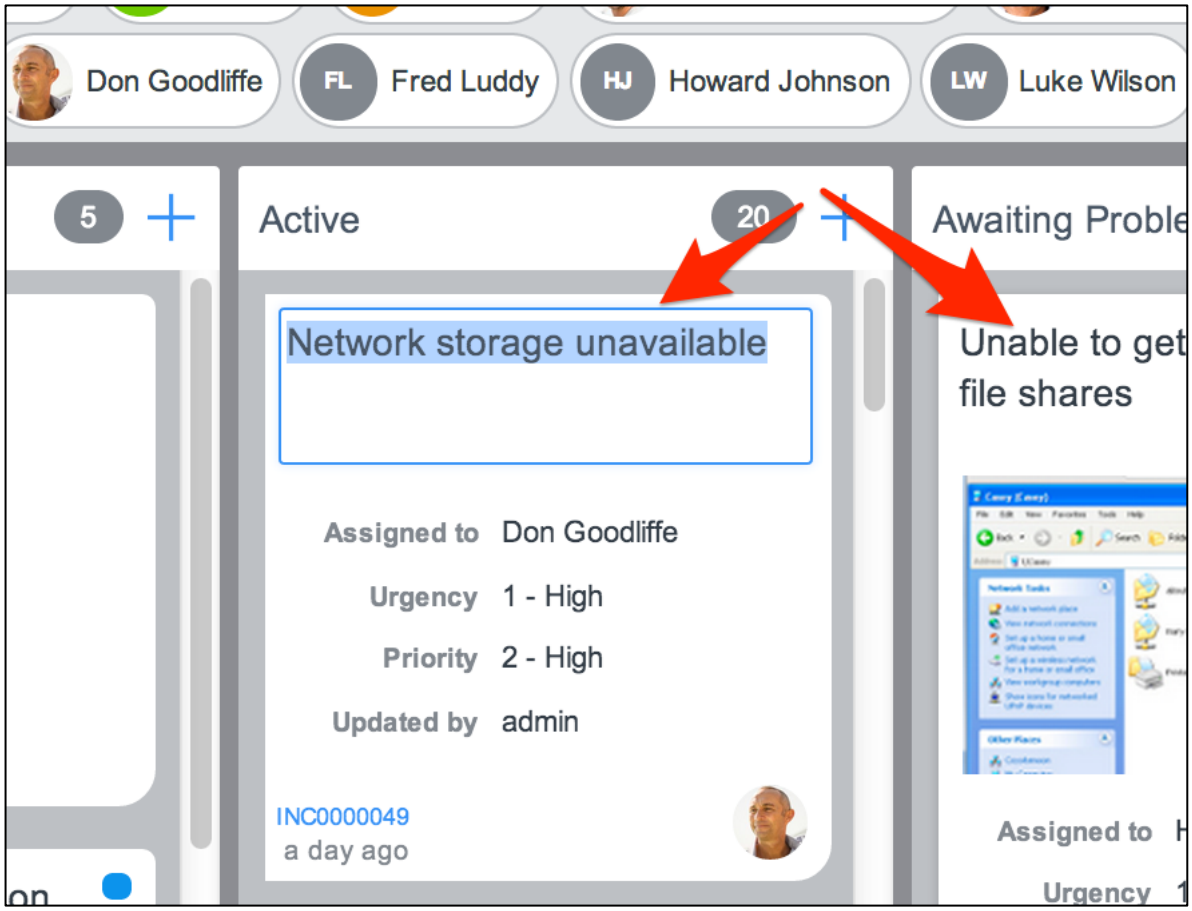
**Vertical** movements **never impact task record data**. They only change the presentation ordering of tasks on the Visual Task Board.

On **Guided Boards** only **horizontal** movements of task cards from one land to another **will change task record data** according to the action taken. On **Flexible** and **Freeform** boards, neither horizontal nor vertical movements change underlying task record data.

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## Edit Task Short Description from Cards

1. Click directly on a Short Description to modify this field in the task record from the card.




2. Press **Return/Enter** to save the change.

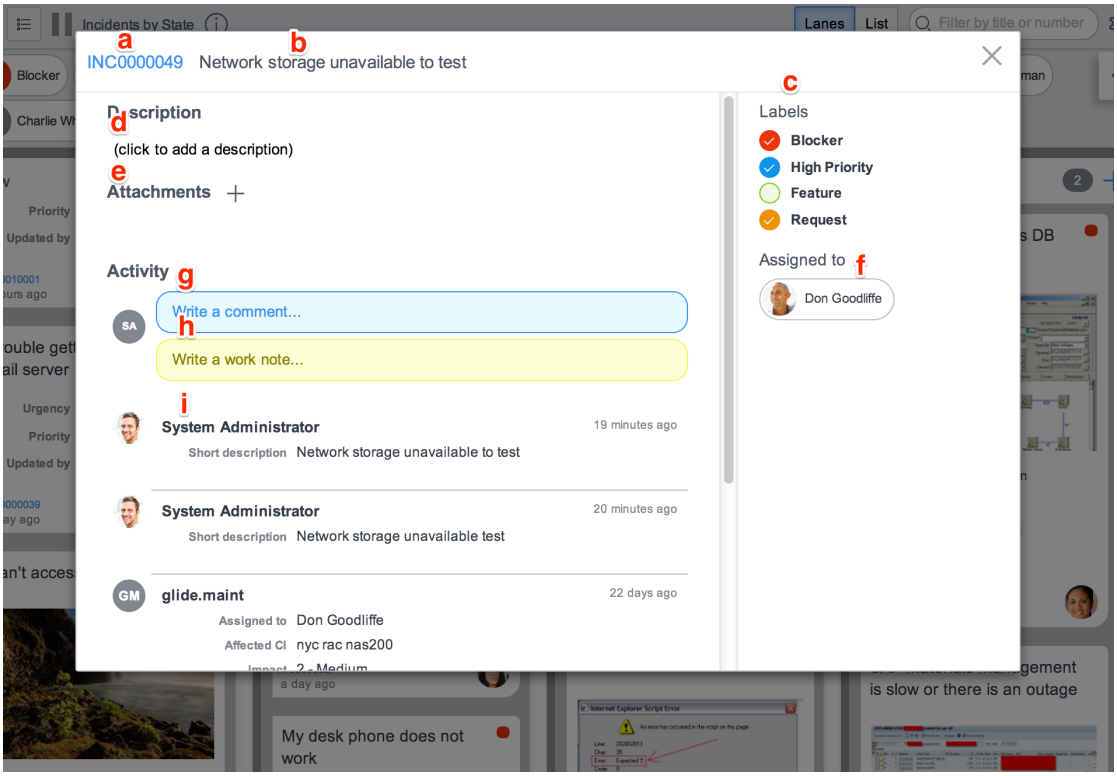
3. Press **ESC** to avoid saving the change.

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## Access Card Details

For more agile interactions with task records, use VTB's Card Details.

1. Click the body of the card to open **Card Details**.
2. From Card Details, take this opportunity to interact with frequented task data.



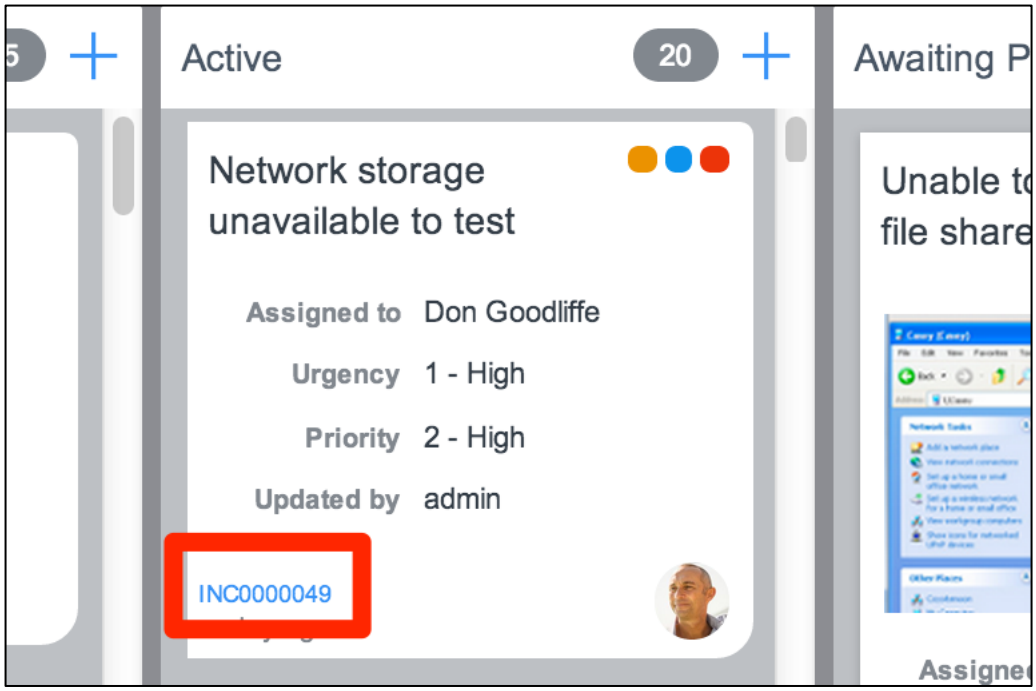

a) Direct link to task's comprehensive "Classic Form"
b) Editable Short Description
c) Add / Remove Labels
d) Editable Description
e) Add / Remove Attachments
f) Add / Remove Assignee
g) Write a comment
h) Write a work note
i) Task Activity Stream

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## Access Task Record Classic Form

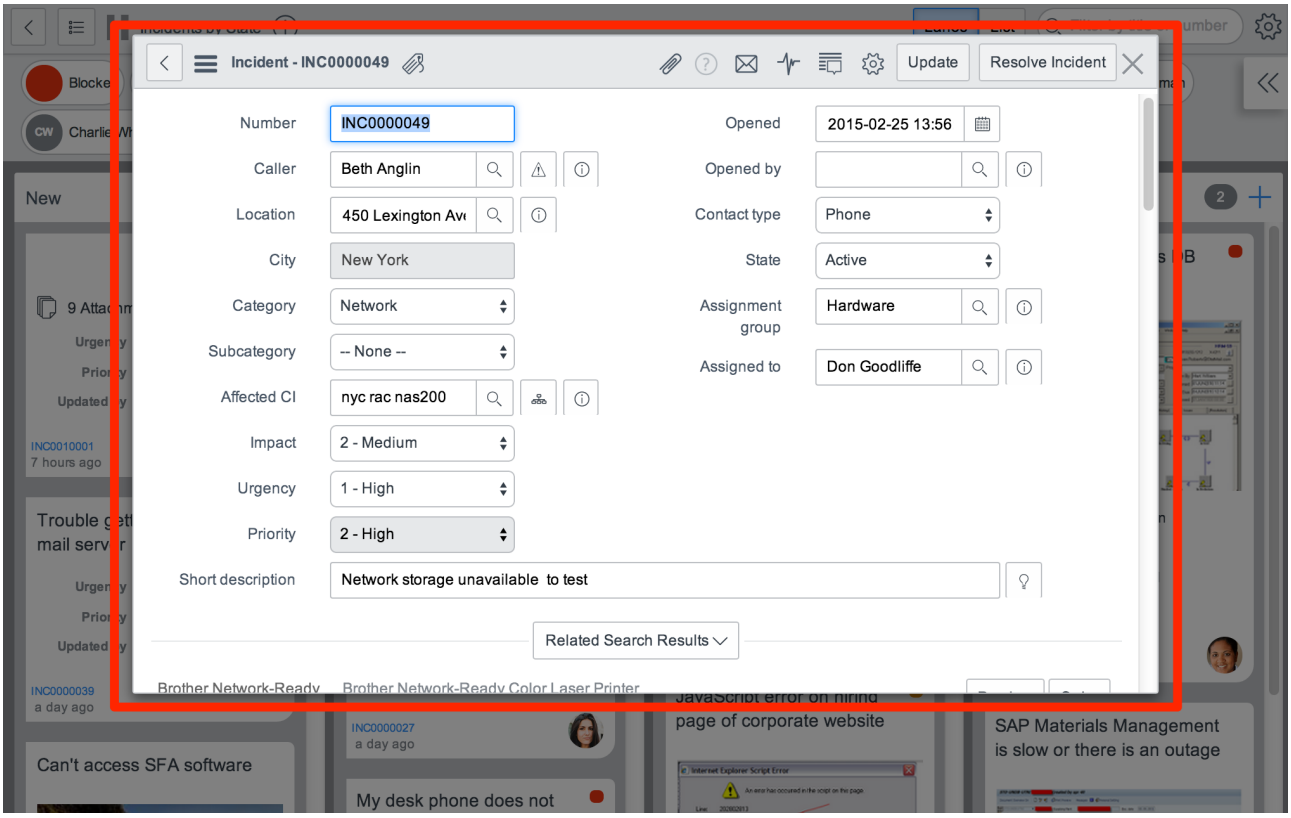
When necessary, you can quickly access the comprehensive **Classic Form** of the task record from a VTB card by clicking the **sys_id** link**.**

1. Click **sys_id** link to access task **Classic Form**




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2. Classic Form displays in a modal.




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# Lab Goal

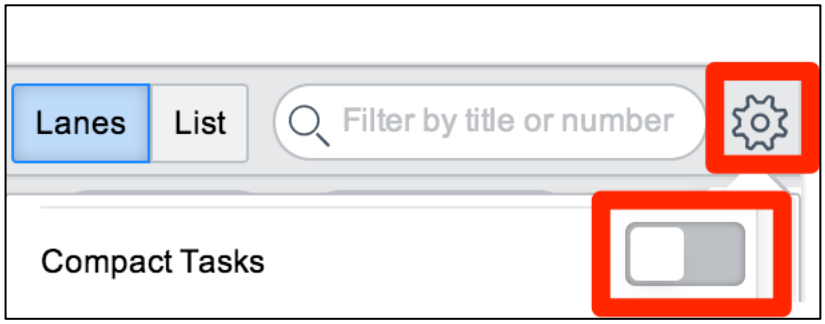
This lab explains how to customize the task data that appears on the cards.

This feature is only of value when the board is **not in Compact Task** mode.

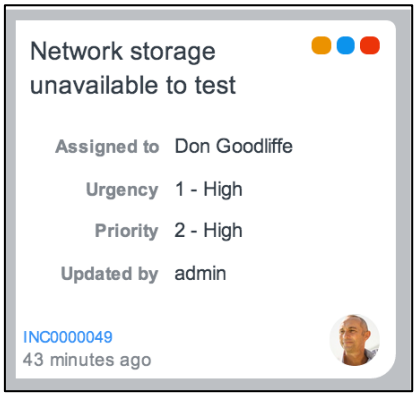
For this lab, use a board composed of **Incidents.**

**Lab 6**
**Customize the Cards**

1. Open **Board Configuration** and be sure Compact Task is **OFF**.

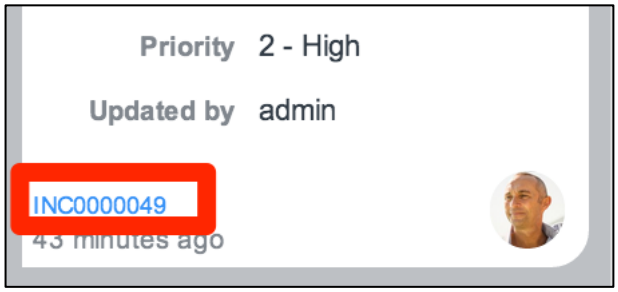



In this lab, suppose you also want to see **Created by** values on your cards; a sample of which should look like the example:

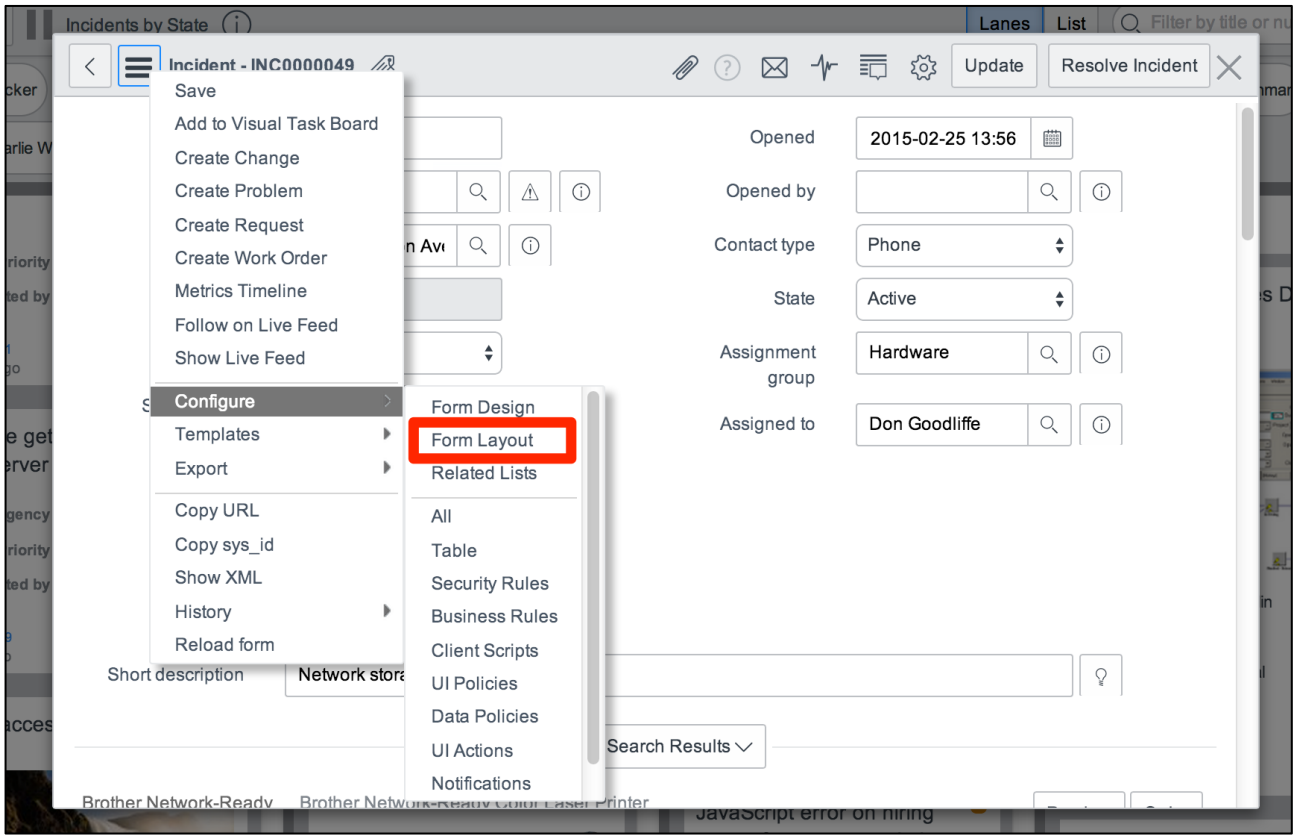



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2. To modify the fields shown on the card, click the **sys_id** link to go to the **Classic Form**.

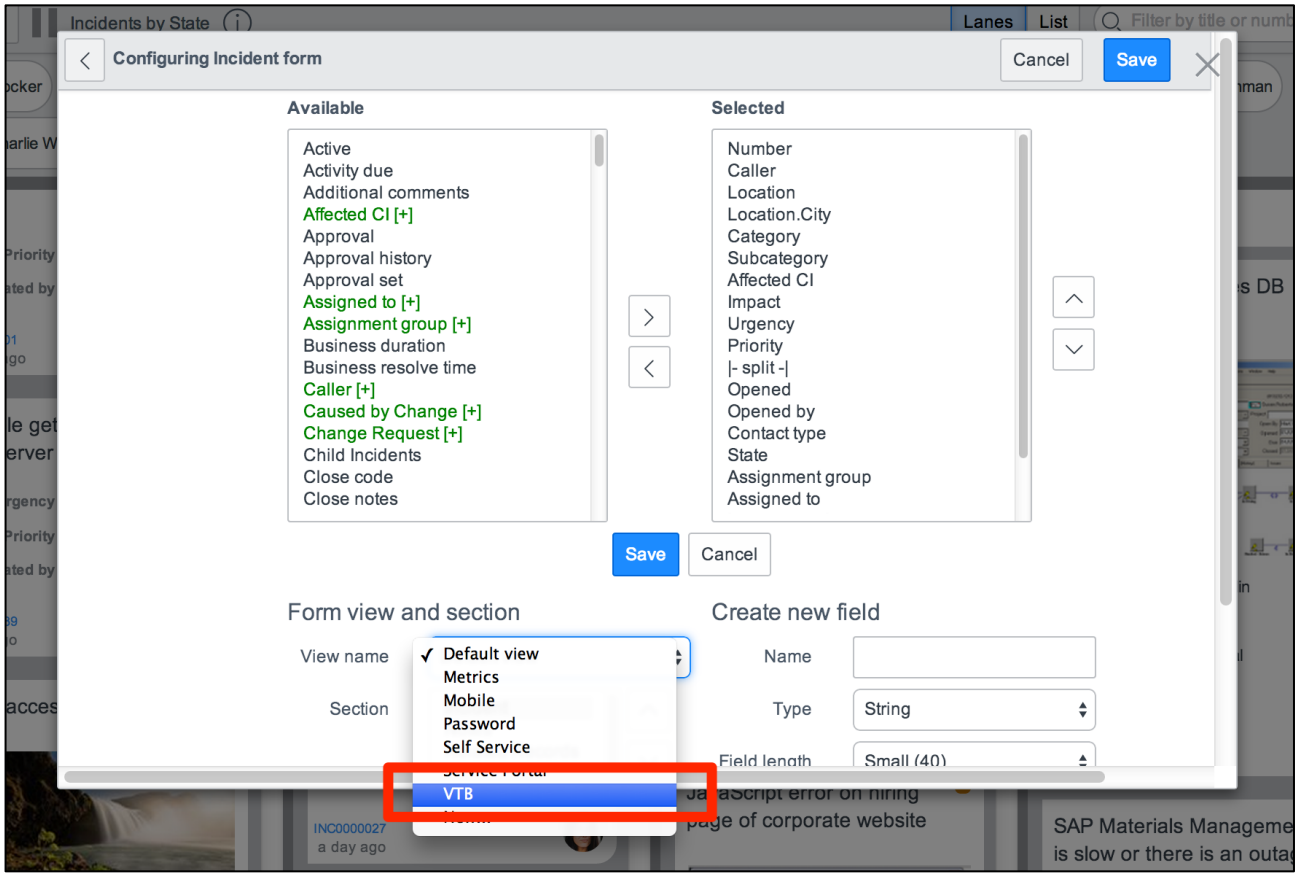



3. Select **Configure > Form Layout** from the form Menu.



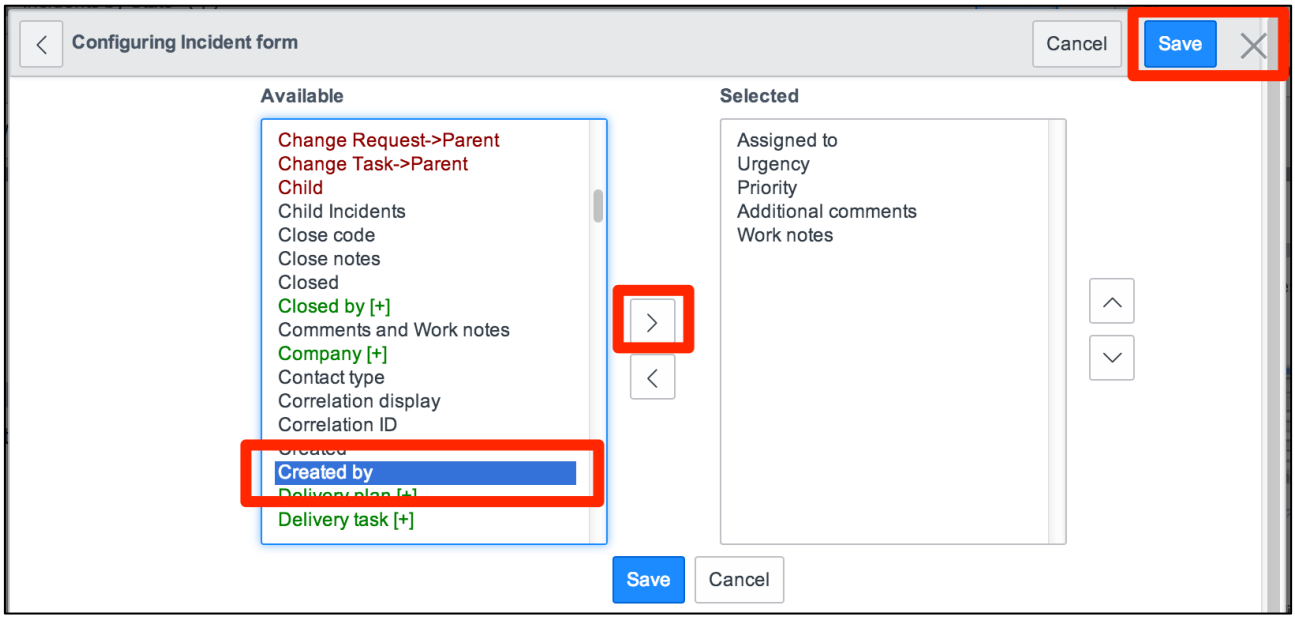

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4. From Form view and section select **View name > VTB**.




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5. Select **Created by** from Available fields and move it over to **Selected** using the **>**.

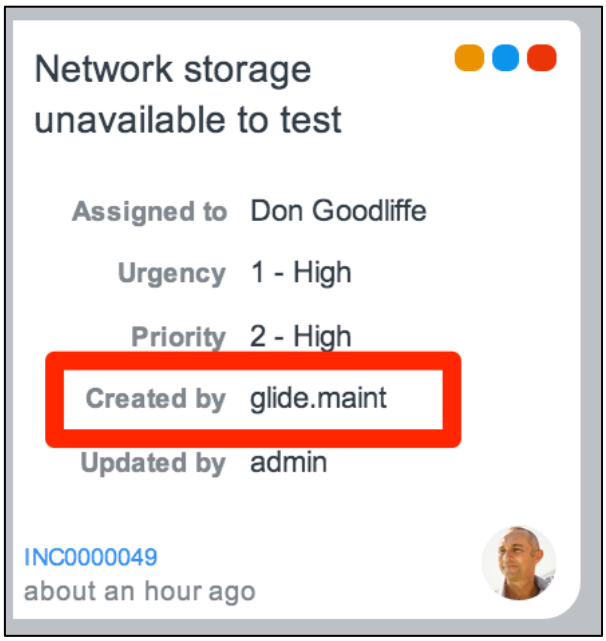



6. Click **Save**.

7. Reload the task board by navigating away and coming back, or refreshing the browser.

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8. **Created by** should now appear on the cards.




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# Lab Goal - EXTRA

This lab explains how to modify the filter that governs the tasks that feed into your Visual Task Board.

**Lab 8**
**Modify**
**Board Filter**

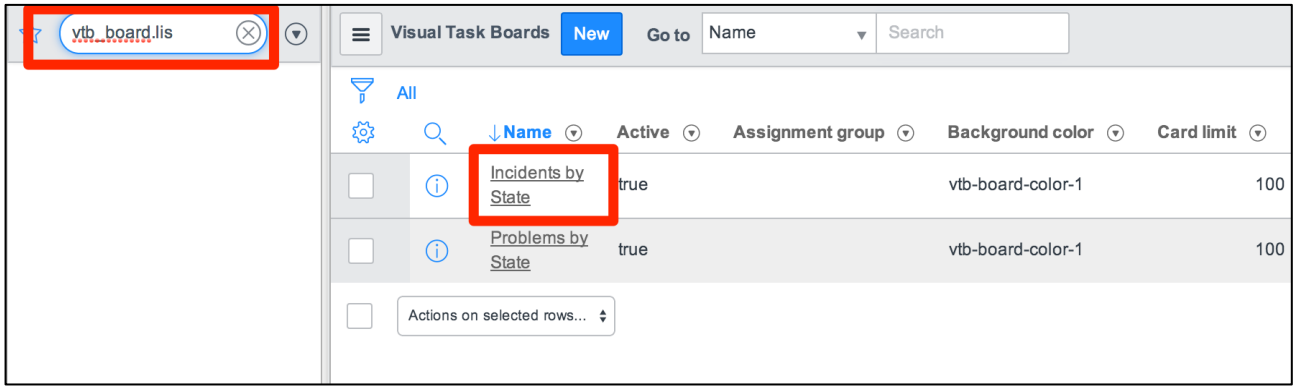
## Modify VTB Filters

You may encounter the need to modify the filter queries behind a Visual Task Board after it has been created – just as you optimize List filters over time.

**Note**: This capability will be added as a Board Configuration feature in the Geneva release. Until then, task board owners will find this workaround useful.

For this lab, you have decided you only want to see with Incidents with **Priority** of **1 – Critical**. In this case, you may wish to modify the filter of the **Incidents by State** task board.

1. Navigate directly to **vtb_board.list** by entering it into the navigator search field.
2. Select the **Incidents by State** task board record.

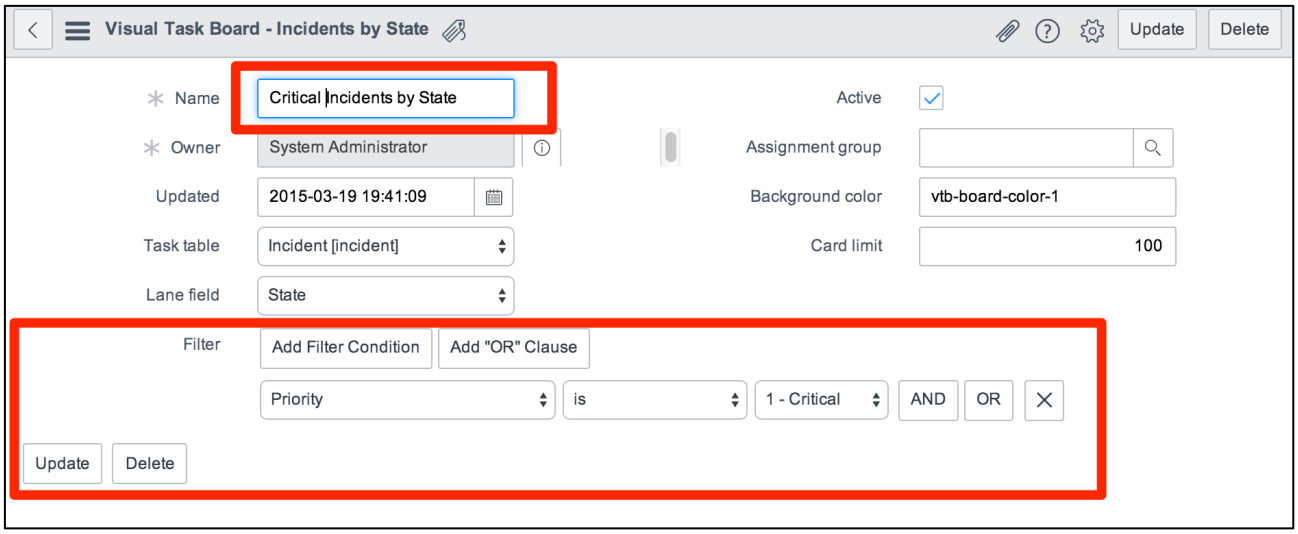



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3. Add a Filter Condition the VTB board record Filter where **Priority** is **1 – Critical**.

4. Rename the task board to reflect these modifications: change Name to **Critical Incidents by State**.

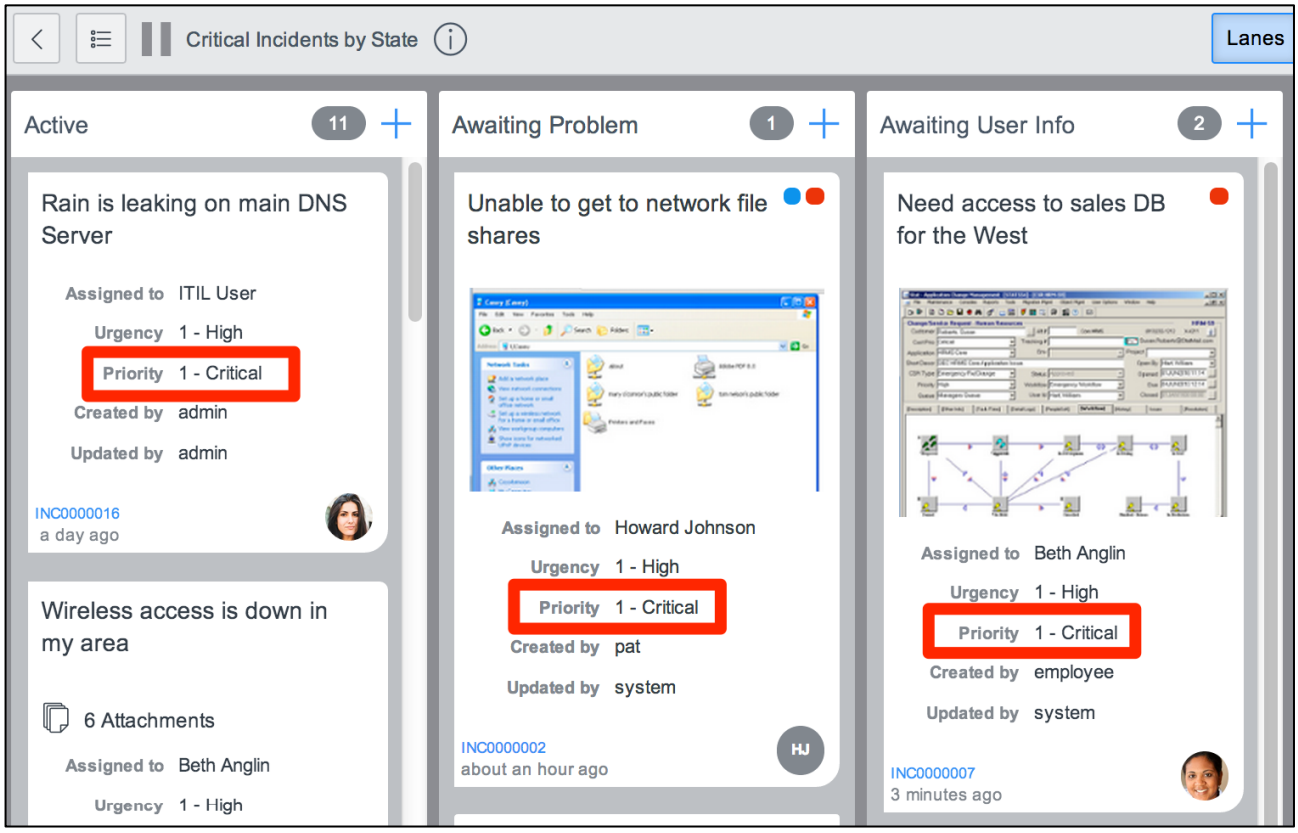
5. Click **Update**.




6. Verify the changes by navigating **to My Task Boards > Critical Incidents by State**.

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7. Only Critical incidents display on the board.




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