Lab Guide

Managing Team Workload:

Collaboration with Visual Task Boards and Connect

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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 1.0
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.

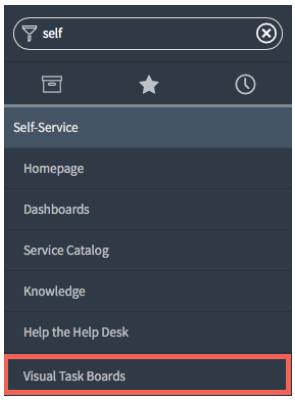
Flexible Boards are created from the column menu of a non-choice field, such as **Number** or **Short Description**. Use a Flexible Board when you want to visualize existing task records, but want to use specialized values for lane names. Updates to task records are reflected on the platform; but lane 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 changes 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 originally used to create the board.

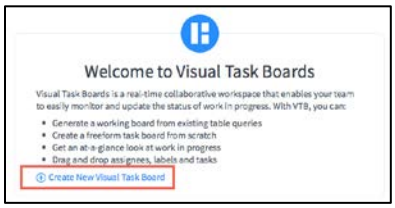
Create a Freeform Board

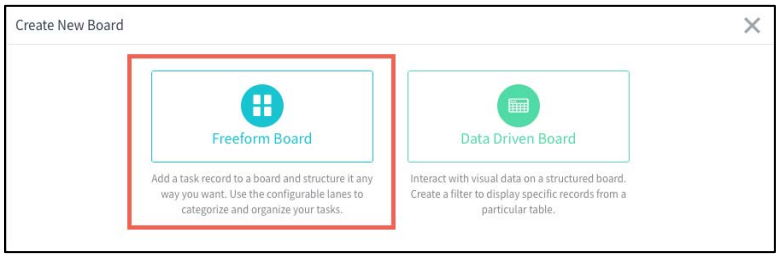
Lab 1.0 Create Boards

1. Navigate to **Self-Service > Visual Task Boards**.

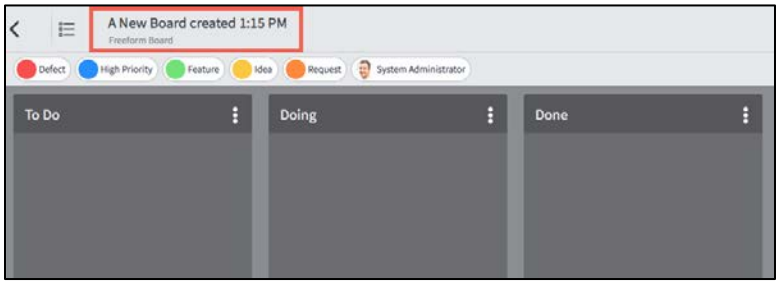


2. Click (+) Create Freeform Board and in the follow-up screen on **Freeform Board** to create a new Freeform Board.

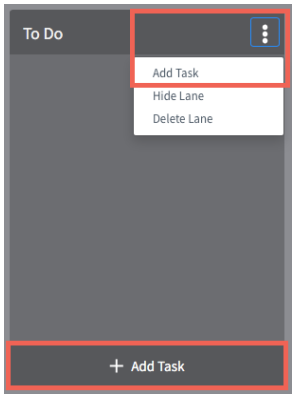




3. Click the default title [**A New Board created hh:mm PM**] to rename the board.



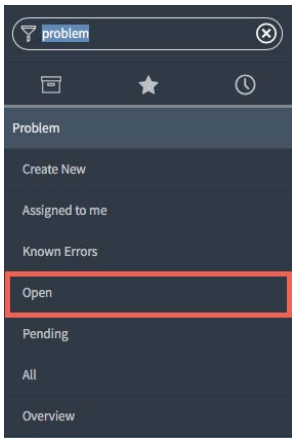
4. Click **Add Task** to create a task within a lane.



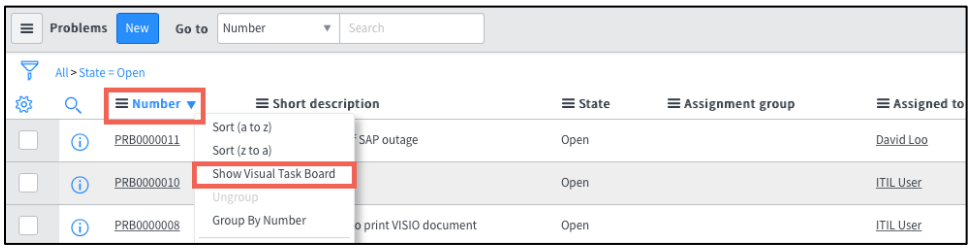
Create a Flexible Board

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

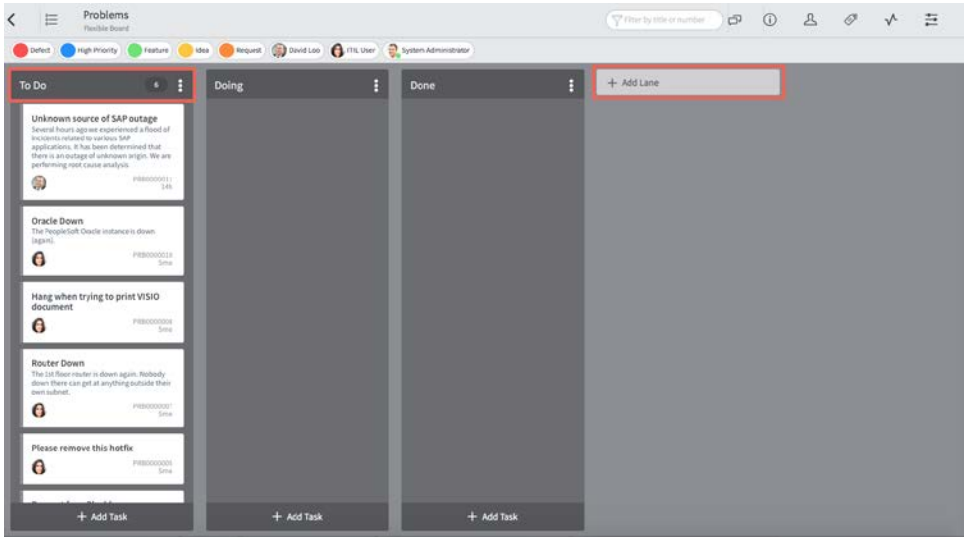
1. Navigate to **Problem > Open**.



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



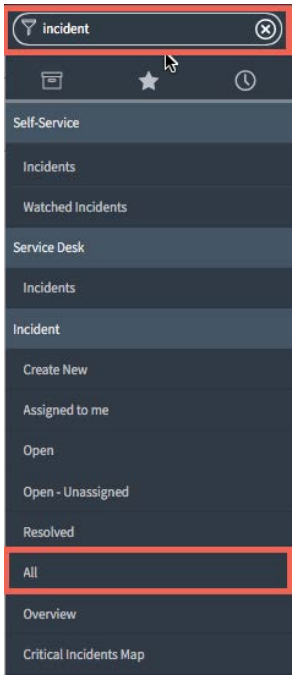
3. Click [**Lane Heading]** to edit lane names or click **Add Lane** to introduce new lanes to the board.



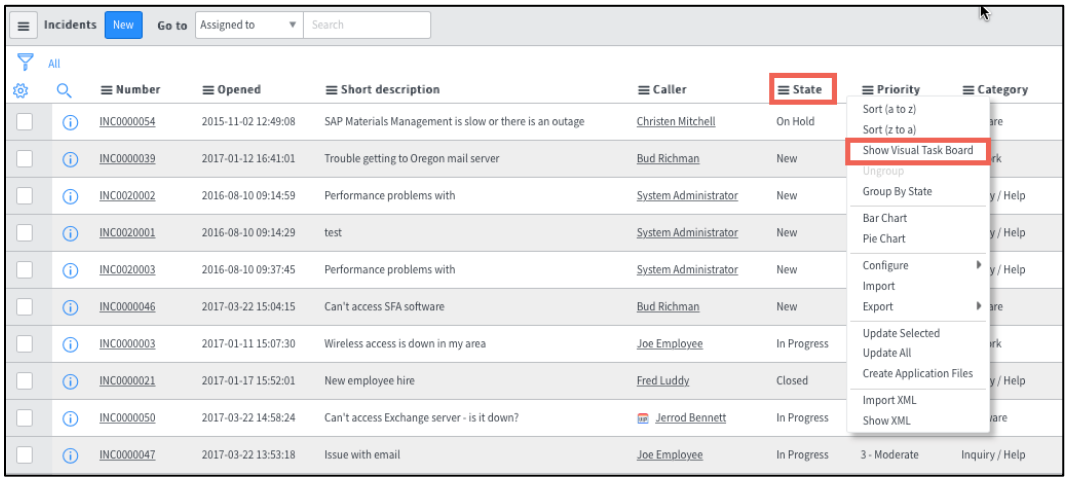
Create a Guided Board

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

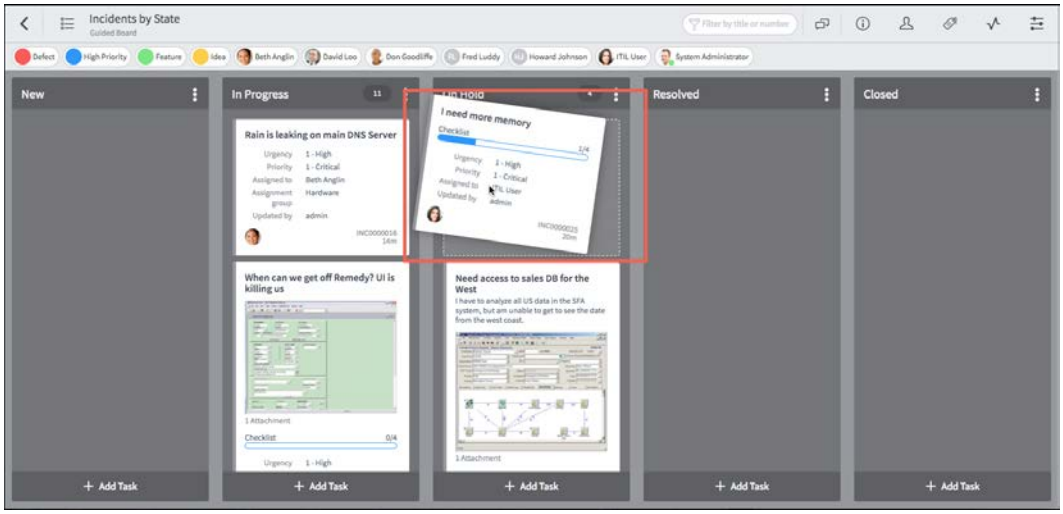
1. **Navigate to Incident > All**.



2. Right-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.



Lab Goal

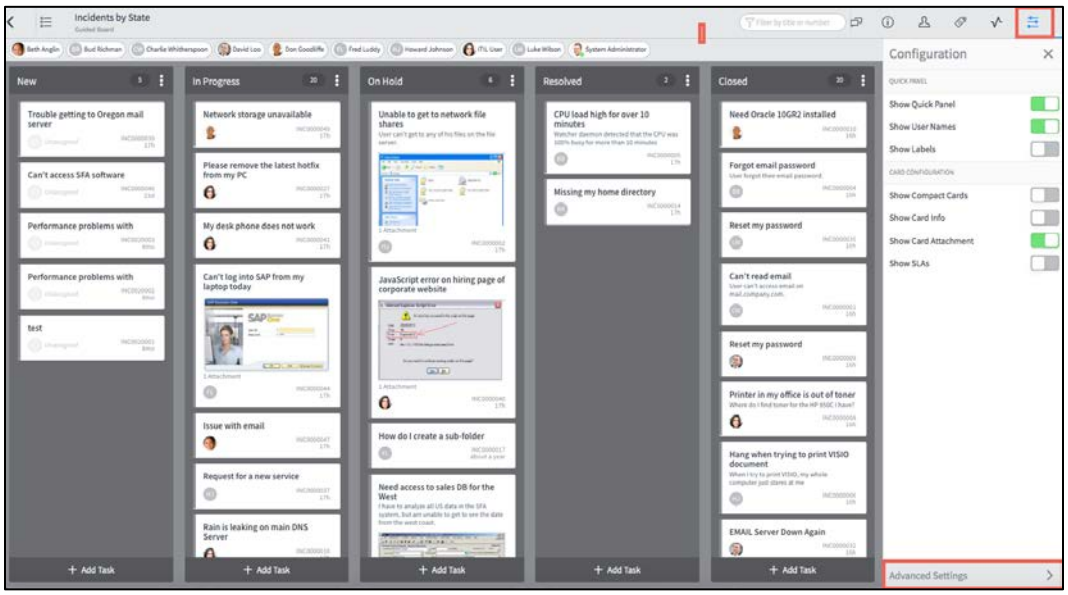
This lab explains how to configure the Visual Task Board preference options to best suit your needs.

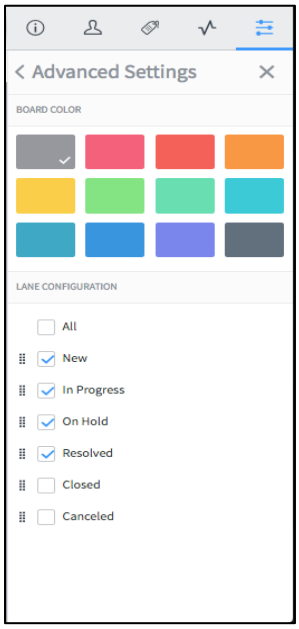
Use this opportunity to experiment with the variety of configuration controls.

Lab 2.0
Configure Visual Task Boards

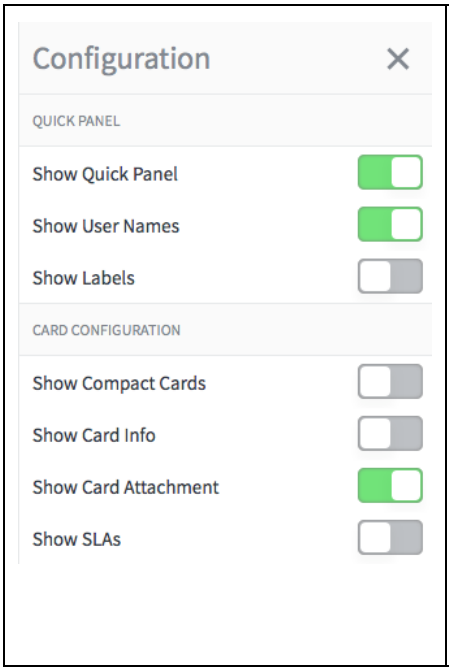
Board Configuration Panel

1. Click the Board Configuration in the upper-right to open the **Board Configuration Panel** and click on **Advanced Settings**.



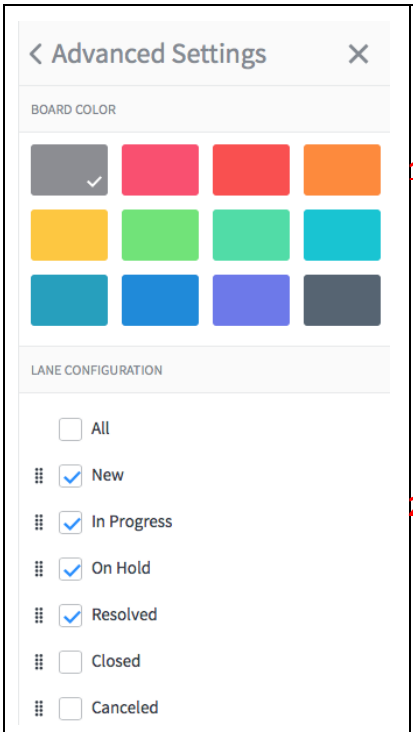


2. Use this opportunity to get familiar with the board's configuration settings.



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1) Show/Hide horizontal "Quick Panel" at the top of the task board
(**Note**: Hiding the Quick Panel will disable toggles 3-5)
2) Show/Hide full names of members and assignees in the Quick Panel
3) Show/Hide labels across the entire board
4) Toggle "Compact Mode" to see more cards in less space
(**Note**: Toggling into Compact Mode will disable toggles 7-8)
5) Show/Hide the info fields of the underlying task type
6) Include attachment thumbnails on cards
7) Show SLA progress on cards



1

2

1) Change board background color
2) Show/Hide/Rearrange Board Lanes

Lab Goal

Lab 3.0 Configure the Board

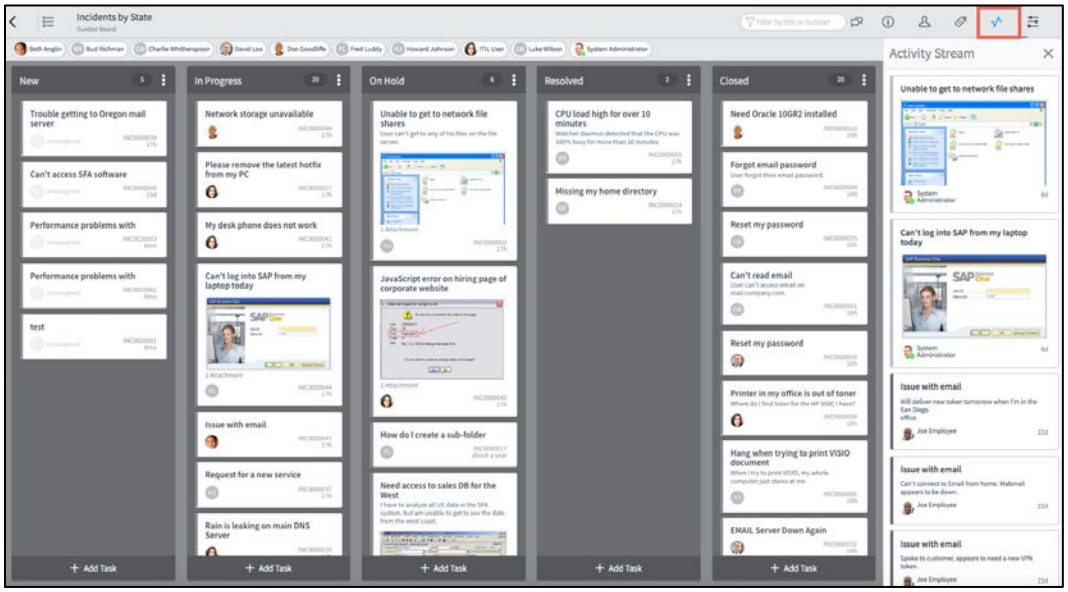
This lab explains the features housed in the Visual Task Boards **Navigation bar**.

From the Navigation bar, you can:

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

Activity Stream

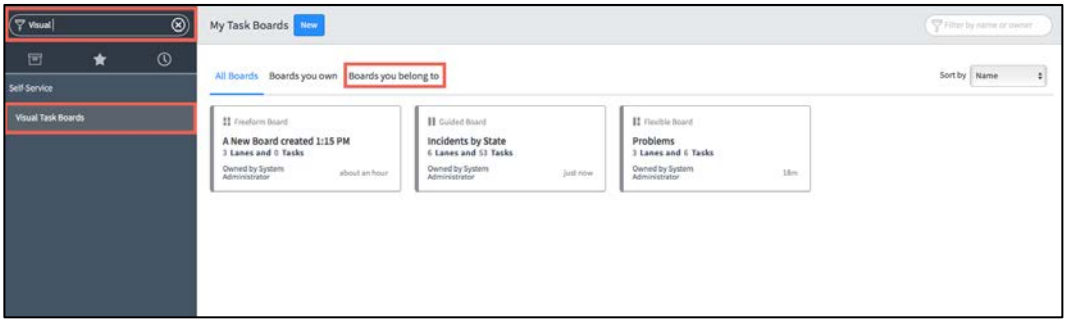
1. First, click on the Activity button in the upper-right of the **Navigation** bar to expose the Activity stream in the side bar.



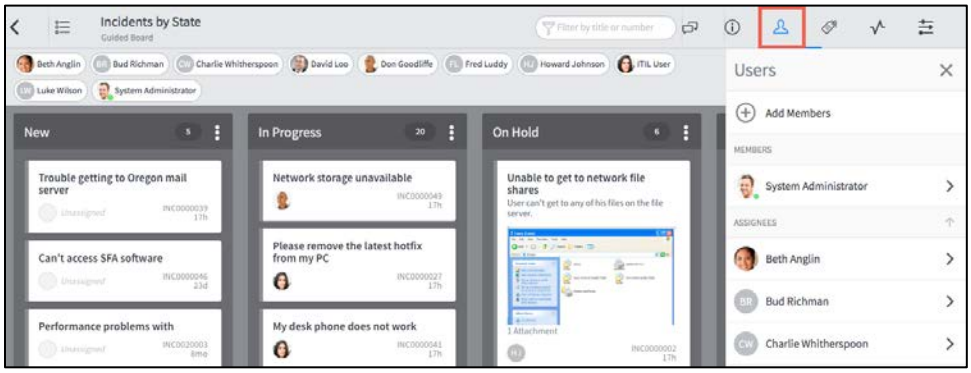
2. **Edit** or **Change** the lane of any task on the board and witness the Activity Stream update.

Manage Members

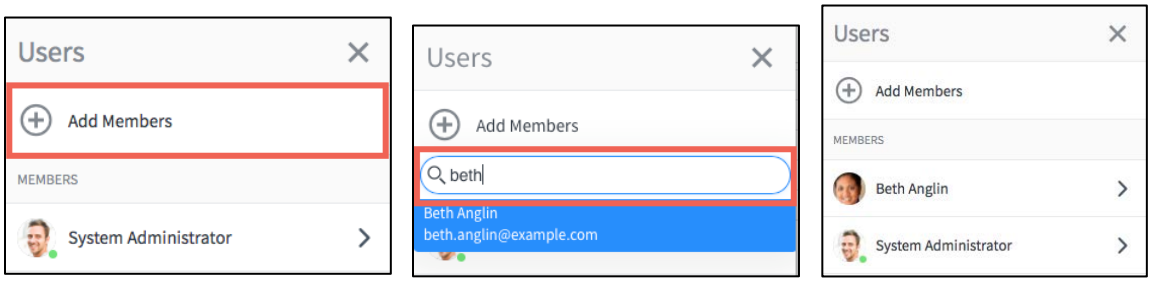
Add members to the Visual Task Board. All task board members enjoy full read-write permission to your VTB. To other members, the board appears under **Boards you belong to** on **My Task Boards**.



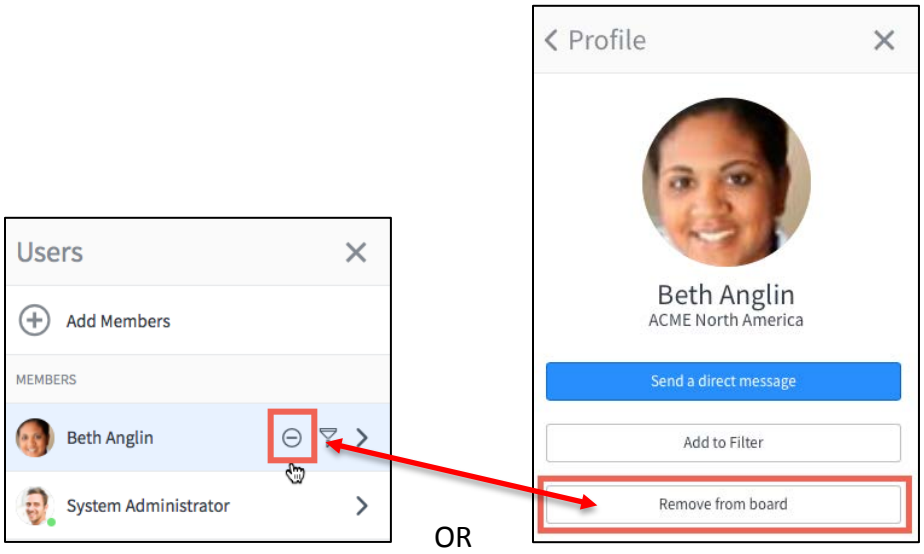
1. First, open a task board; click the user button in the upper-right of the **Navigation** bar to expose the User / Member Sidebar.



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



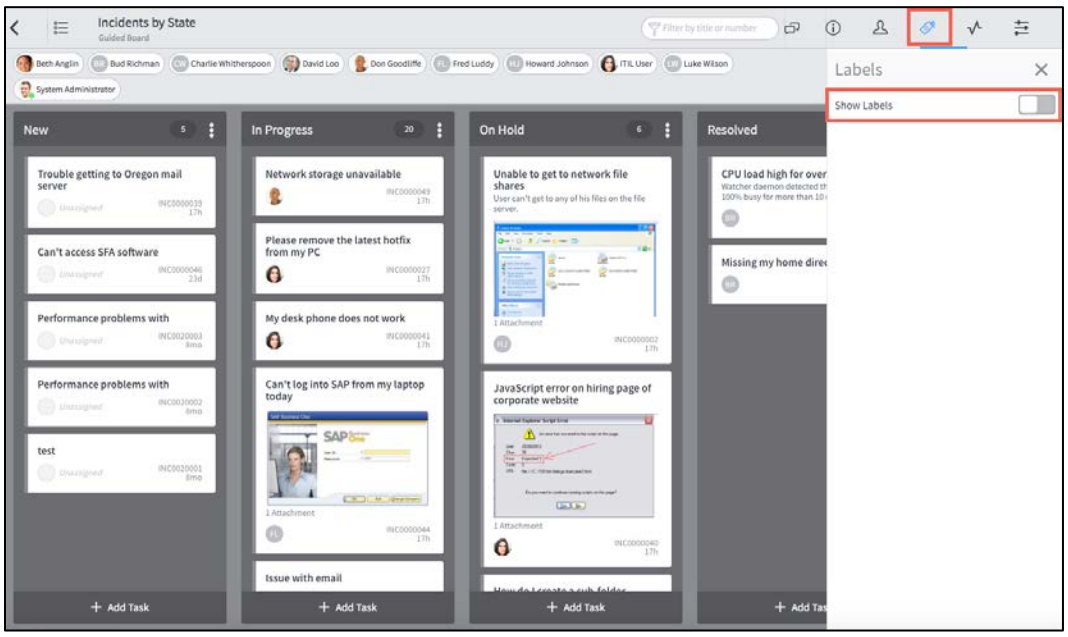
3. Remove **Beth Anglin** as a member by clicking **Edit**.



Manage Labels

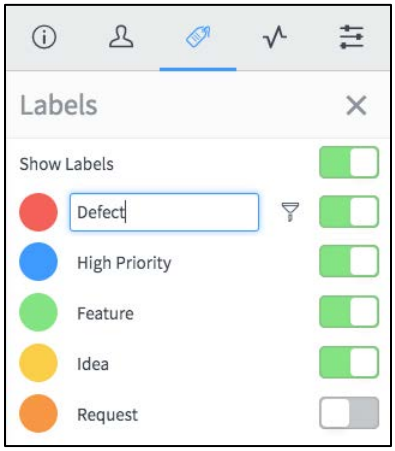
All Visual Task Boards are generated with a default set of five (5) **Labels**, which make categorization and filtering of tasks quick and easy.

1. From the Navigation bar, click the **Label** control option.



2. Switch Show Labels to **ON**.

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



Lab Goal

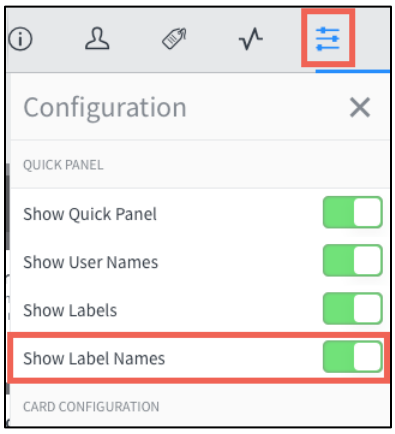
This lab explains how to perform the following from the Virtual Task Board Navigation bar:

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

Lab 4.0 Interact With the Board

Assign Members to Tasks from the Quick Panel

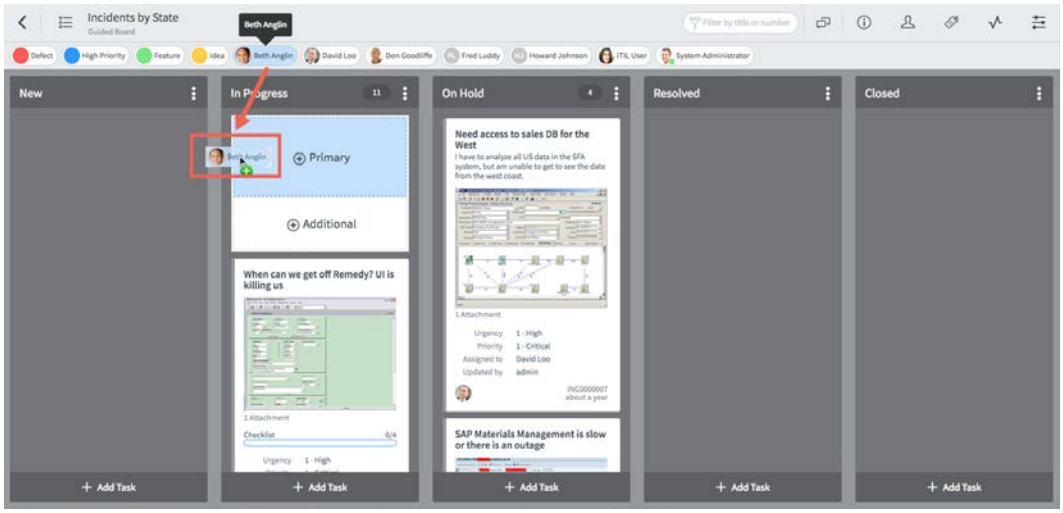
1. First, be sure **Show Quick Panel** and **Show Labels** are turned **ON** in the board configuration settings.



2. Find available **Members, Assignees** and **Labels** within the Quick Panel.

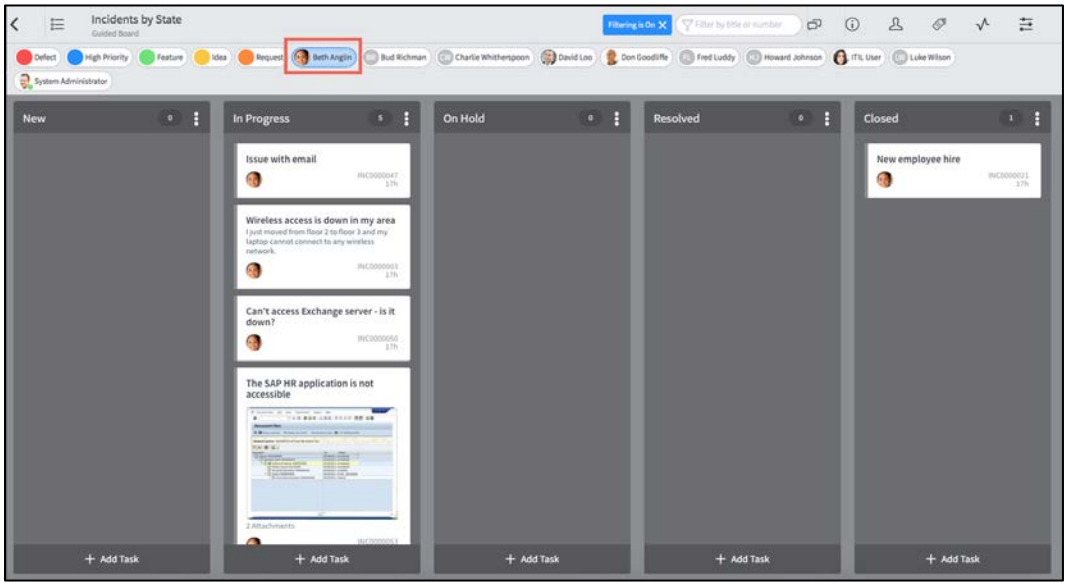


3. Click, hold, drag and drop the member name from the Quick Panel onto a task card.

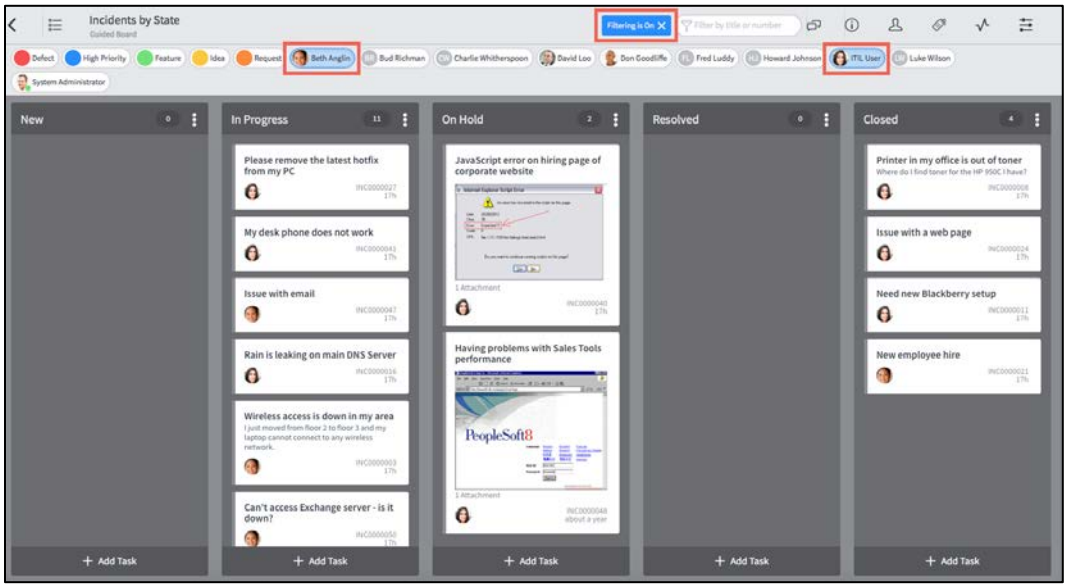


Filter Task Cards by Member(s) from Quick panel.

1. Click **Member** to filter board. When you select the **Filtering is On** indicator, it turns blue.



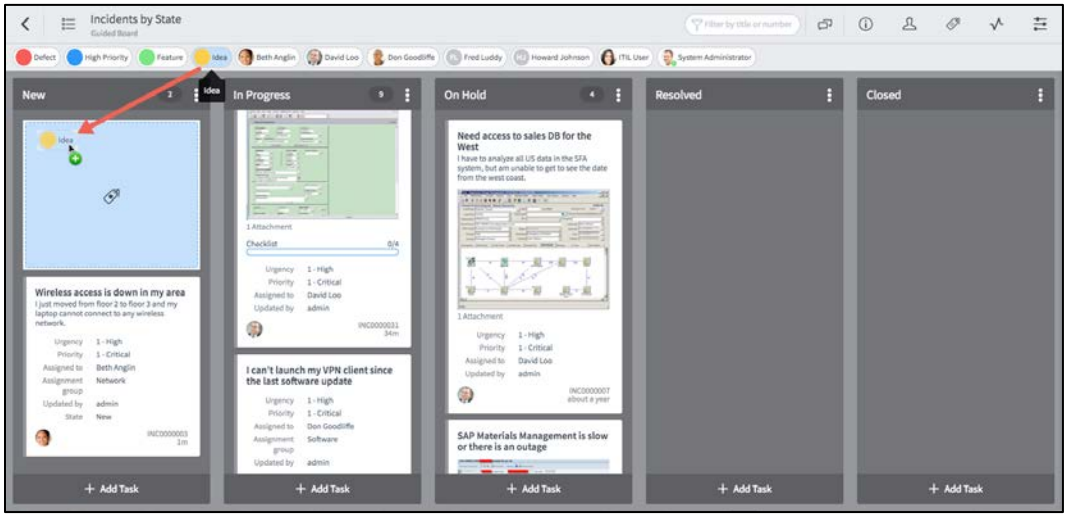
2. Click another Member to include task cards assigned to another assignee.



3. Click **Member** to remove an individual filter value; or click (**X**) in the **Filtering is On** indicator to remove all filter parameters and restore board content.

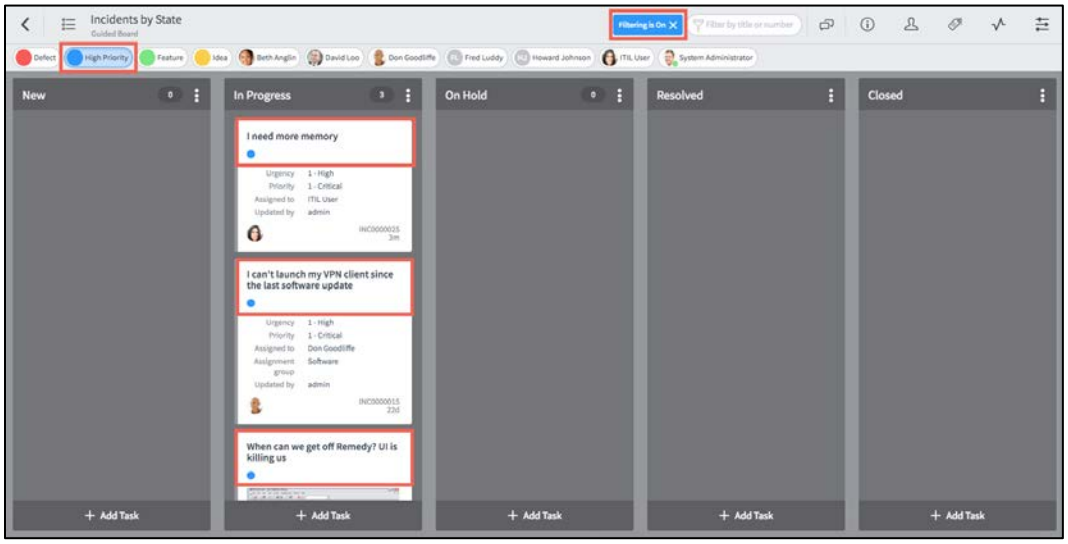
Assign Labels to Tasks from the Quick Panel

1. Click, hold, drag, and drop label from the Quick Panel onto a task card.



Filter Task Cards by Label from the Quick Panel

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



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

Lab Goal

Lab 5.0 Interact with Tasks

This lab explains how to interact with task records from Visual Task Boards.

Move Cards

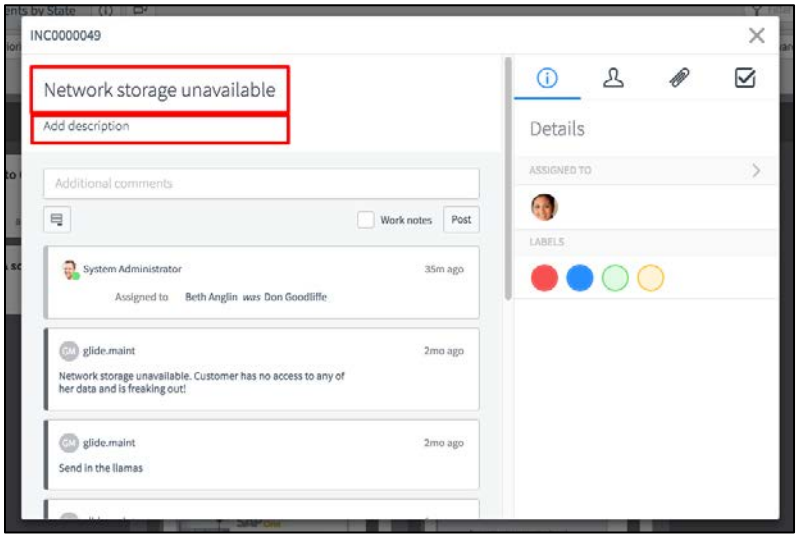
You can rearrange the task cards of the board however you like. But be aware of what, if any, impact these actions have on the task data.

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 lane to another **change task record data** according to the action taken. On **Flexible** and **Freeform** boards, neither horizontal nor vertical movements change underlying task record data.

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.

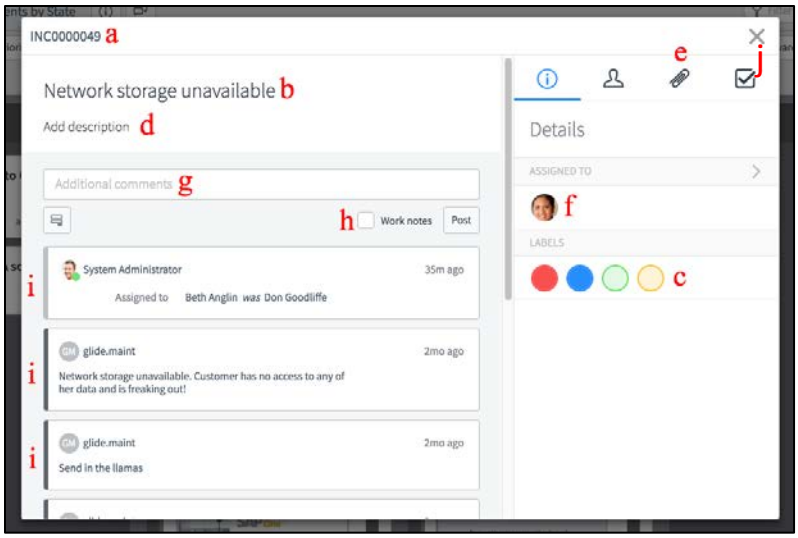
3. Press **ESC** to avoid saving the change.

Access Card Details

For more agile interactions with task records, use the VTB 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.

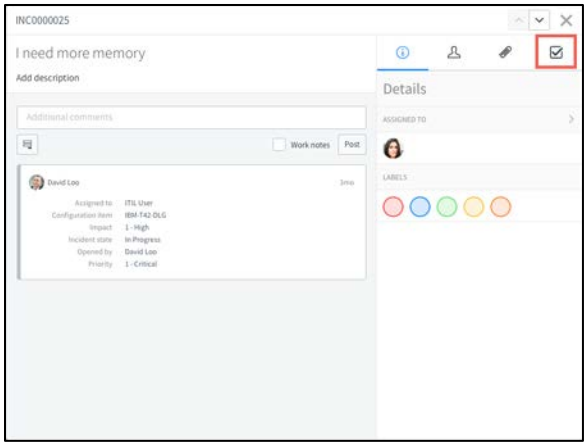


Direct link to task's comprehensive **Classic Form**
Editable Short Description
Add / Remove Labels
Editable Description
Add / Remove Attachments
Add / Remove Assignee
Write a comment
Write a work note
Task Activity Stream
Checklist

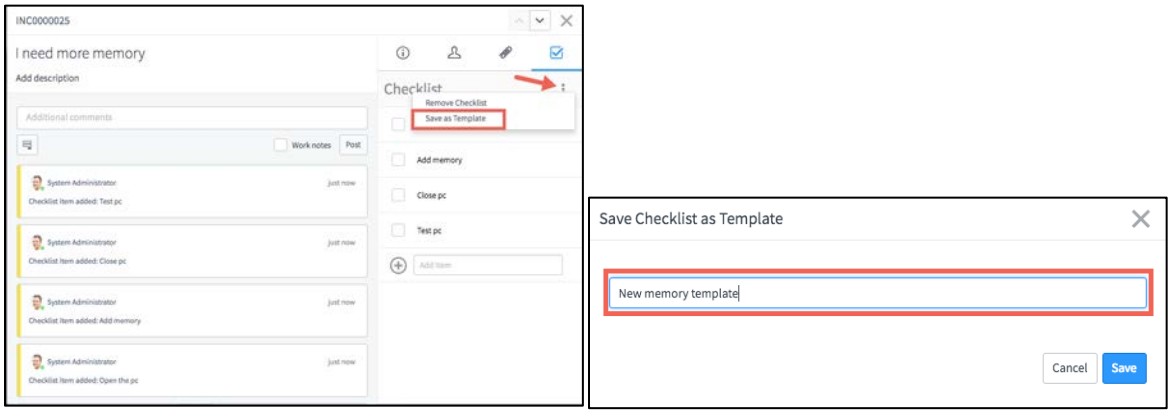
Checklists help track the progress of tasks on your Visual Task Board.

1. Open a card and click on the check list button.

2. Create a few checklist items (notice that the checklist items are also added to the activity stream).

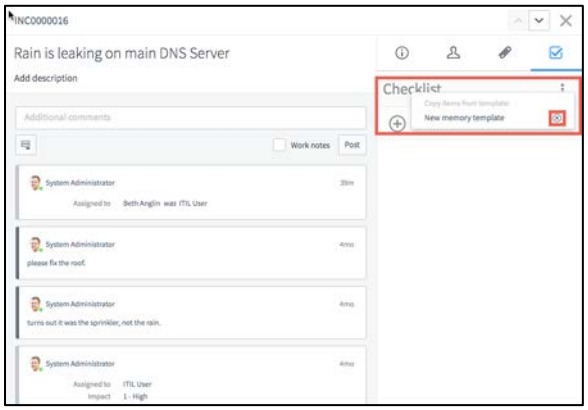


3. Create a template based on the added checklist items. Click the **Checklist menu** and select **Save as Template**.



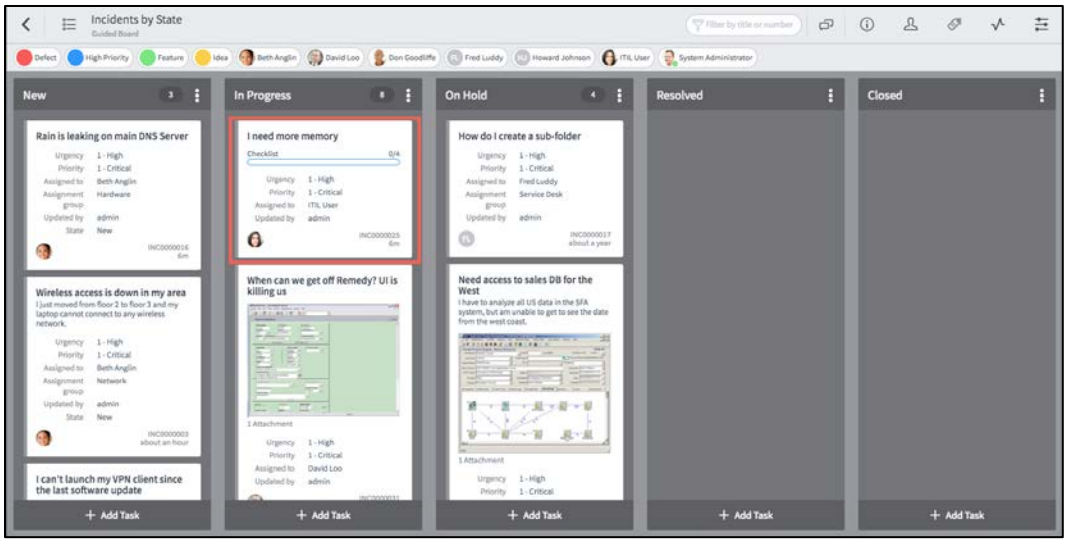
The created template can be reused in other tasks by selecting the template via the checklist menu.

4. Open a new task, click the checklist, and select the created template.



(Delete the template option with the cross button)

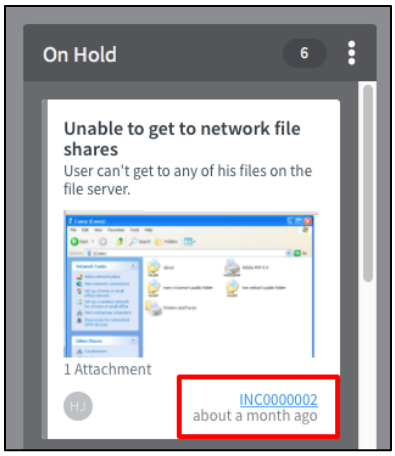
5. The progress of the checklist is visible in the card.



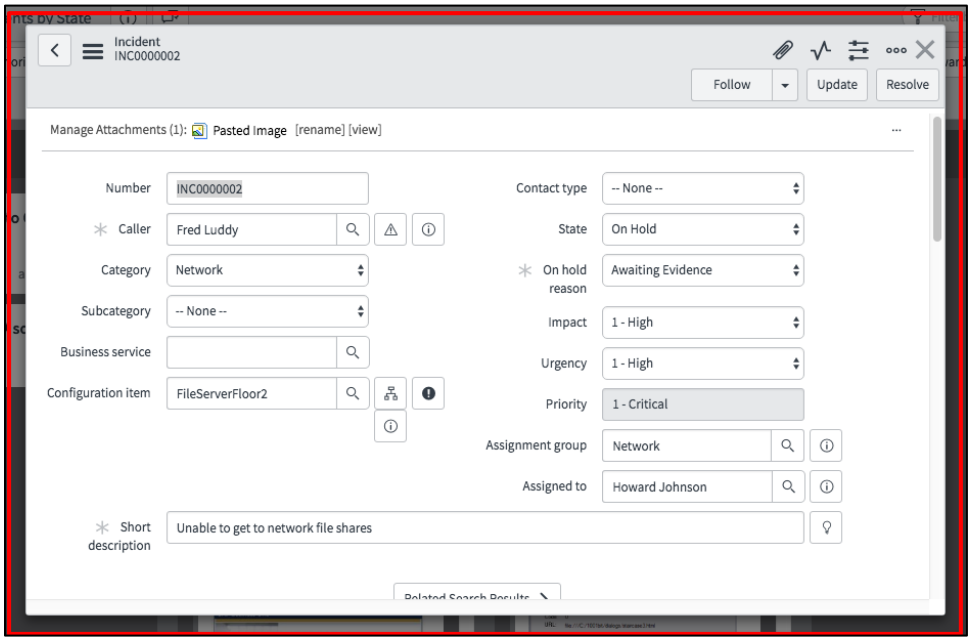
Access Task Record Classic Form

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

1. Click **record number** link to access task **Classic Form**.



2. Classic Form displays in a modal.



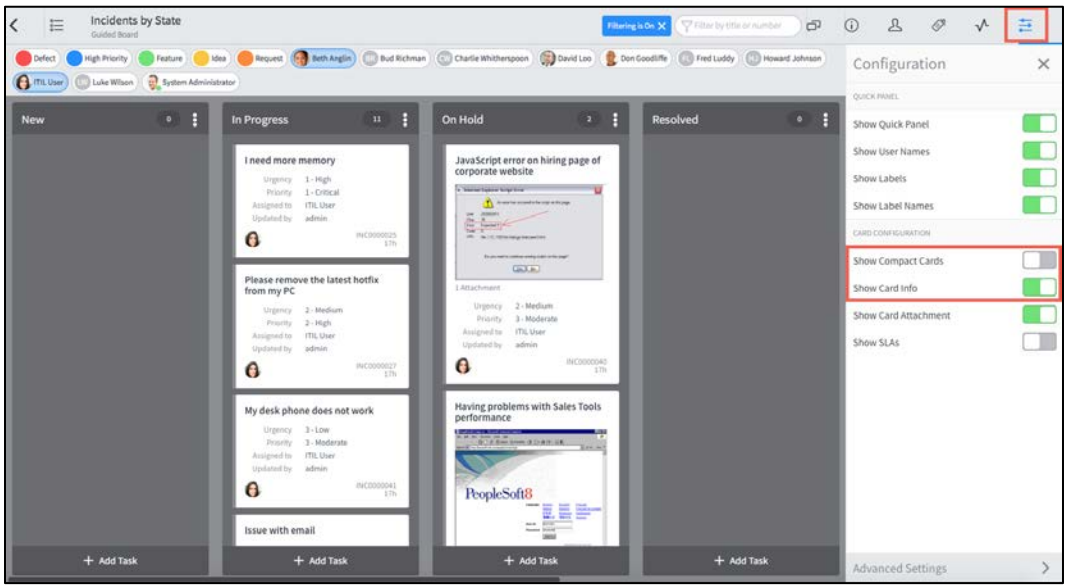
Lab Goal

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.

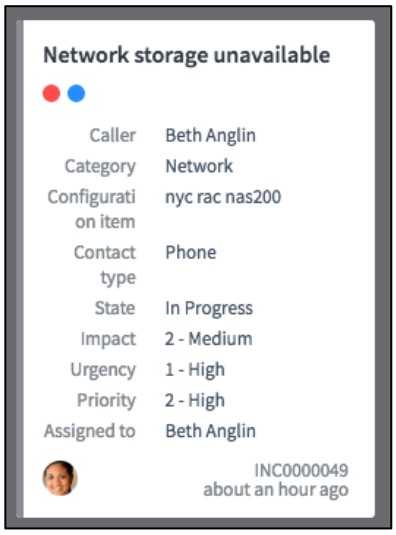
For this lab, use a board composed of **Incidents.**

Lab 6.0
Customize the Cards

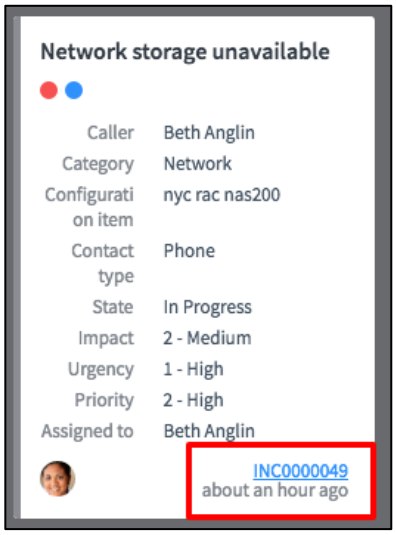
1. Open Board Configuration and be sure **Compact Task** is **OFF** and **Show Card** Info is **ON**.



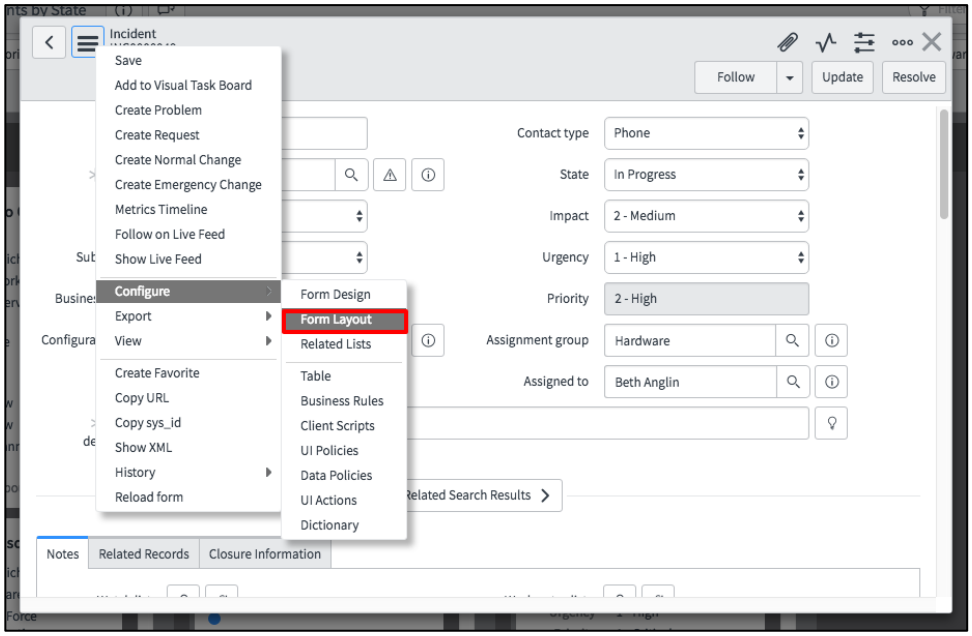
2. In this lab, suppose you also want to see **Created by** values on your cards; a sample of which should look like the example:



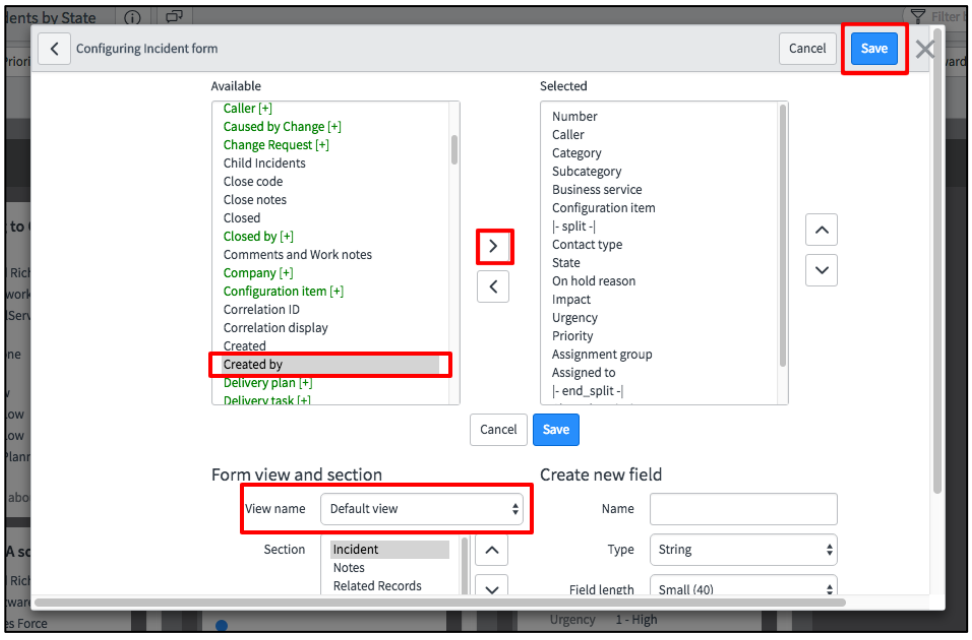
3. To modify the fields shown on the card, click the **sys_id** link to go to the **Classic Form**.



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

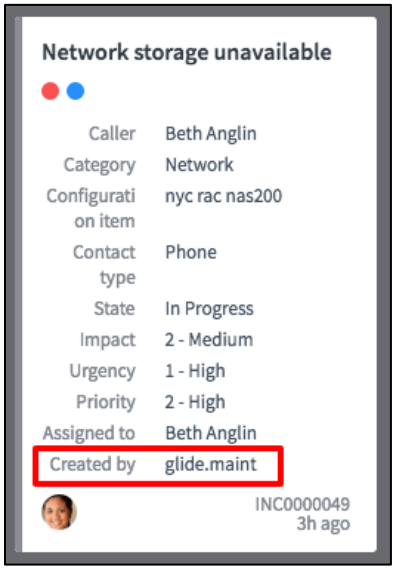


5. Verify that **Default View** is the selected **View Name**. Select **Created by** from Available fields and move it over to **Selected** using the(**>**).



6. Click **Save**.

7. Reload the task board by navigating away and coming back, or refreshing the browser.
8. **Created by** should now appear on the cards.



Lab Goal

Lab 7.0
Modify
Board Filter

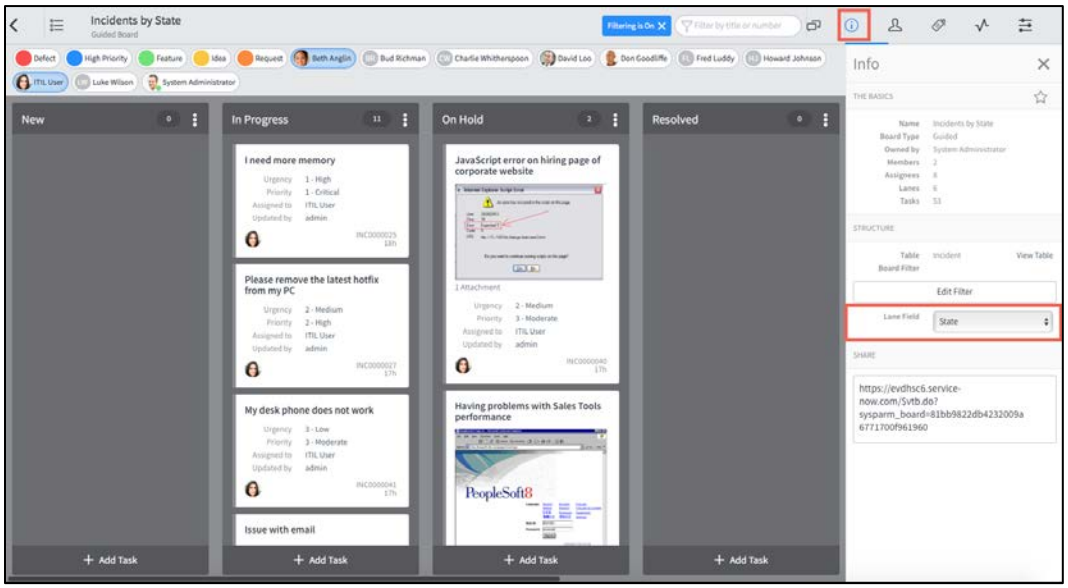
This lab explains how to modify the filter that governs the tasks that feed into your Visual Task Board.

Modify VTB Filters

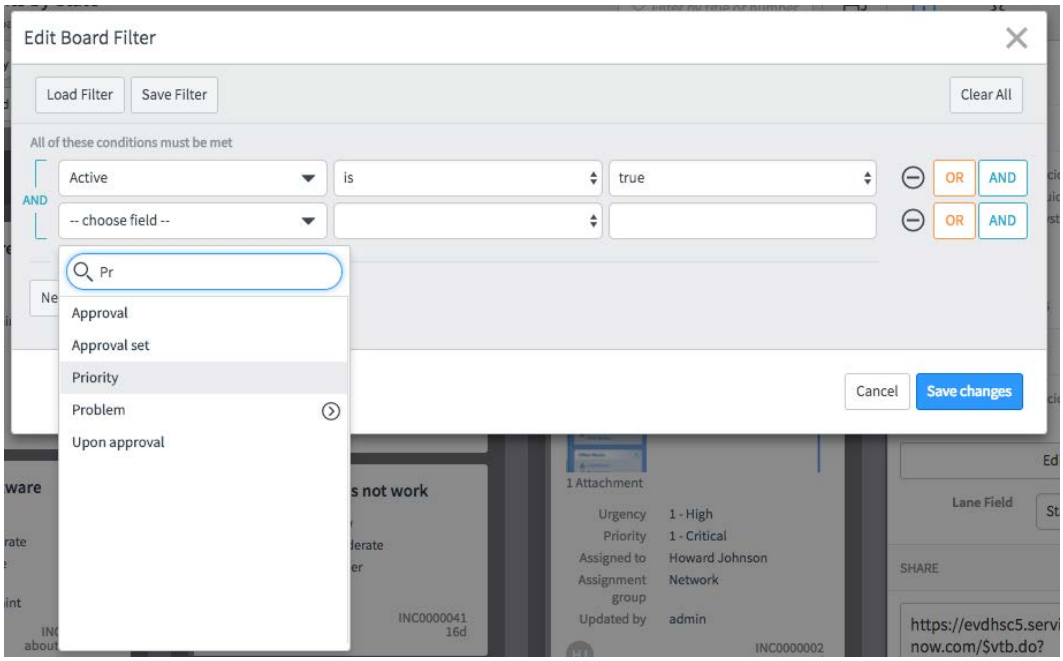
You may encounter the need to modify the filter queries behind a Visual Task Board after it has been created – just as you optimize List filters over time.

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

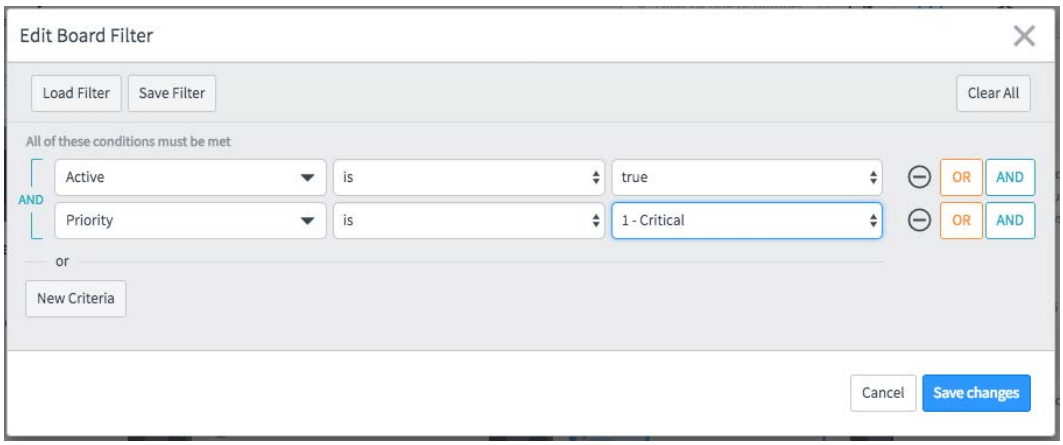
1. Open the **Board Info** menu to see the Board Filter section. Select the **Edit Filter** button to expose the **Edit Board Filter** modal.



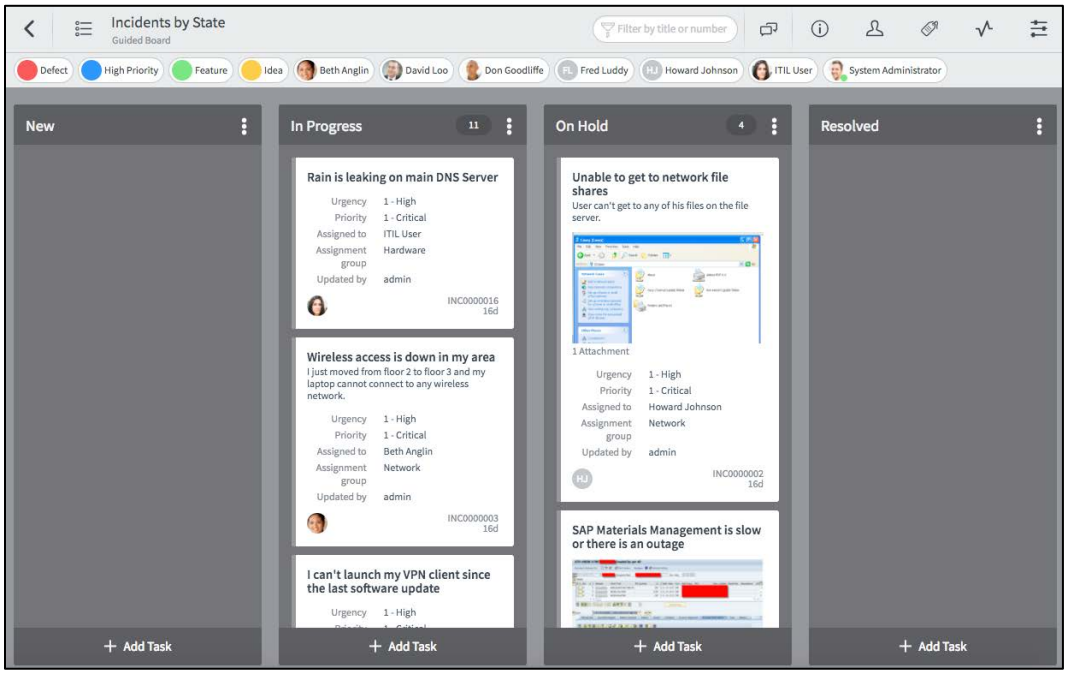
2. From the **Edit Board Filter** modal, use the **AND** button to add an additional filter condition. Select the **Priority** field from the newly created filter condition.



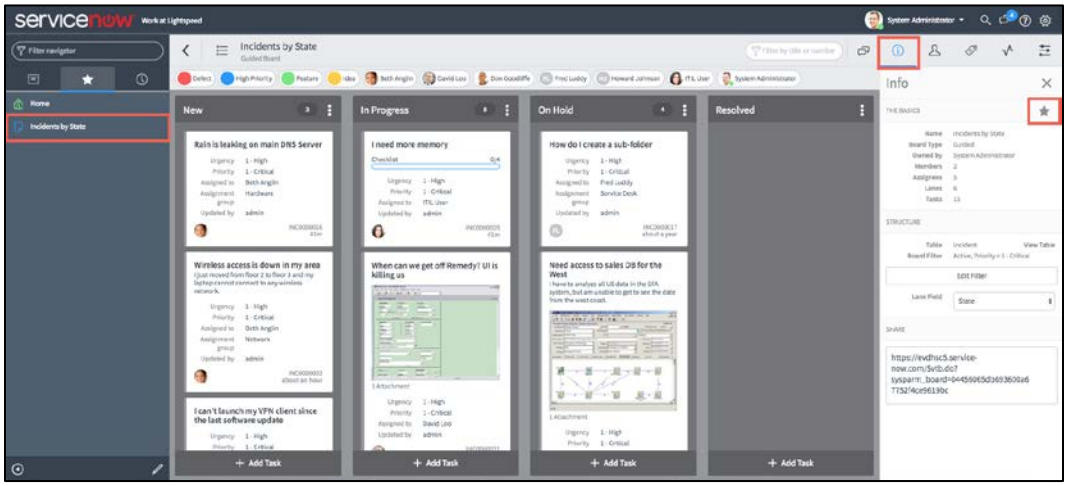
3. Set the Filter Condition such that **Priority** is **1 – Critical**. Click the **Save changes** button to apply the updated filter.



4. Only Critical incidents display on the board.



5. Add this Visual Task Board to your favorites via the **Navigation Info button.** Click on the **star** and verify if the **VTB** is added to your **Favorites bar**.



Lab Goal

This lab explains how to modify the field that governs the lanes in your Visual Task Board.

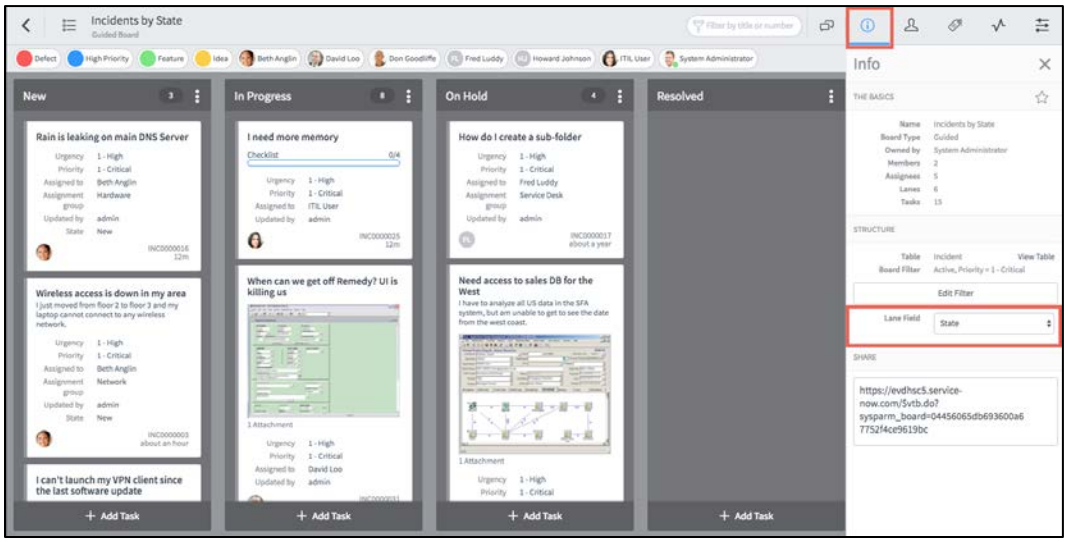
Lab 8.0 Modify the Lane Field

Modify the Lane Field

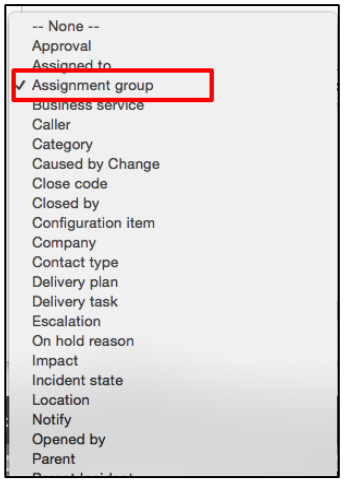
You may encounter the need to change the field that is associated with the lanes in your Visual Task Board.

For this lab, you create the task board with the lanes bound to the State field. In this case, you may wish to view the board by the Assignment Group field instead of the State field.

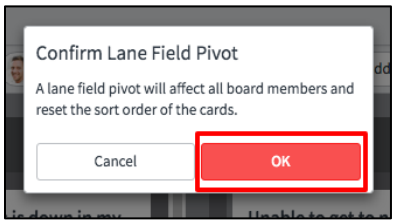
1. Open the Board Info menu to see the Lane Field. Select the **Lane Field** dropdown list to expose the lane field options.



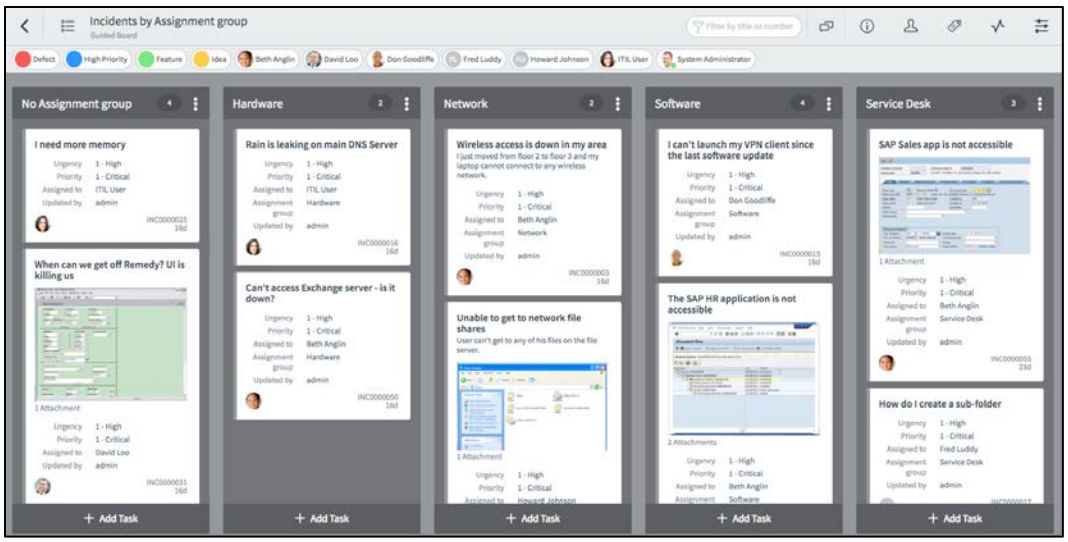
2. Select the **Assignment Group** field to pivot the lane field from State to Assignment Group.



3. Click **OK** to confirm.



4. Verify the changes to the lane headers.



Lab Goal

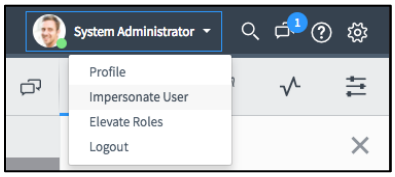
This lab explains how to create a Visual Task Board conversation so that board members can collaborate in real-time in the context of a board.

- Create VTB Connect conversation
- Manage Members

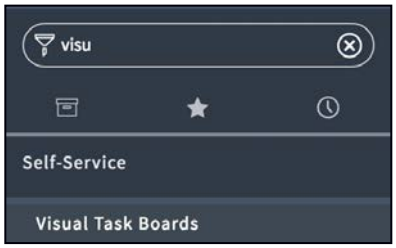
Lab 9.0
Create a VTB Conversation

Create a Visual Task Board Conversation

1. Impersonate to Beth Anglin. In the upper-right corner, select the dropdown next to the user and click on **Impersonate User.**

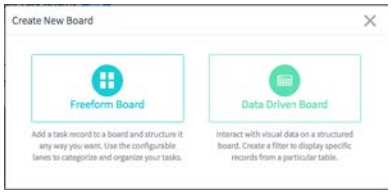


2. As Beth Anglin, navigate to **Self Service** > **Visual Task Boards**.

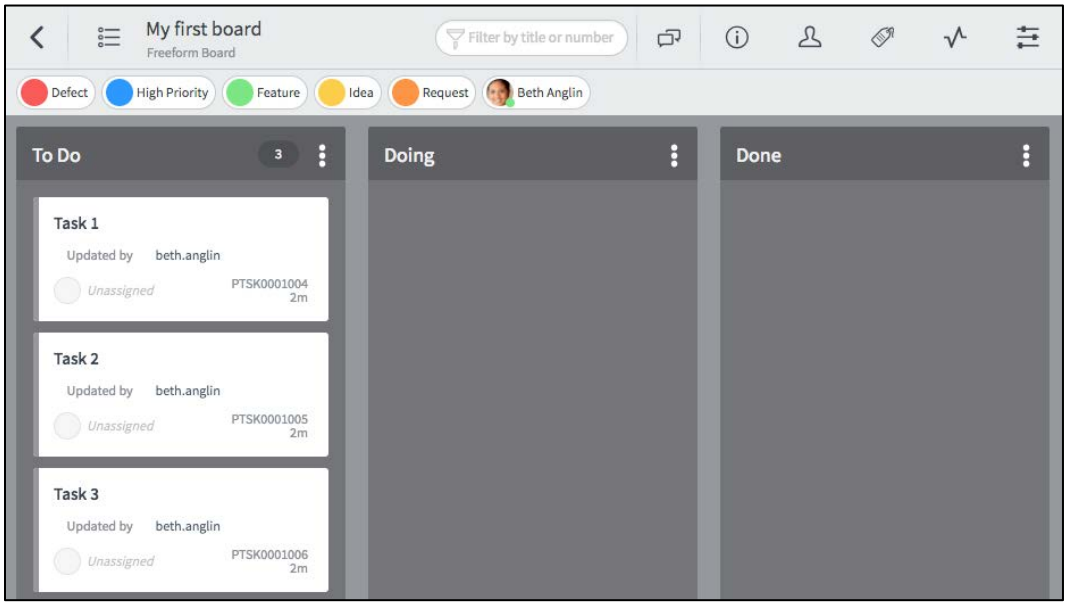


3. Click **New** and **Freeform board.**

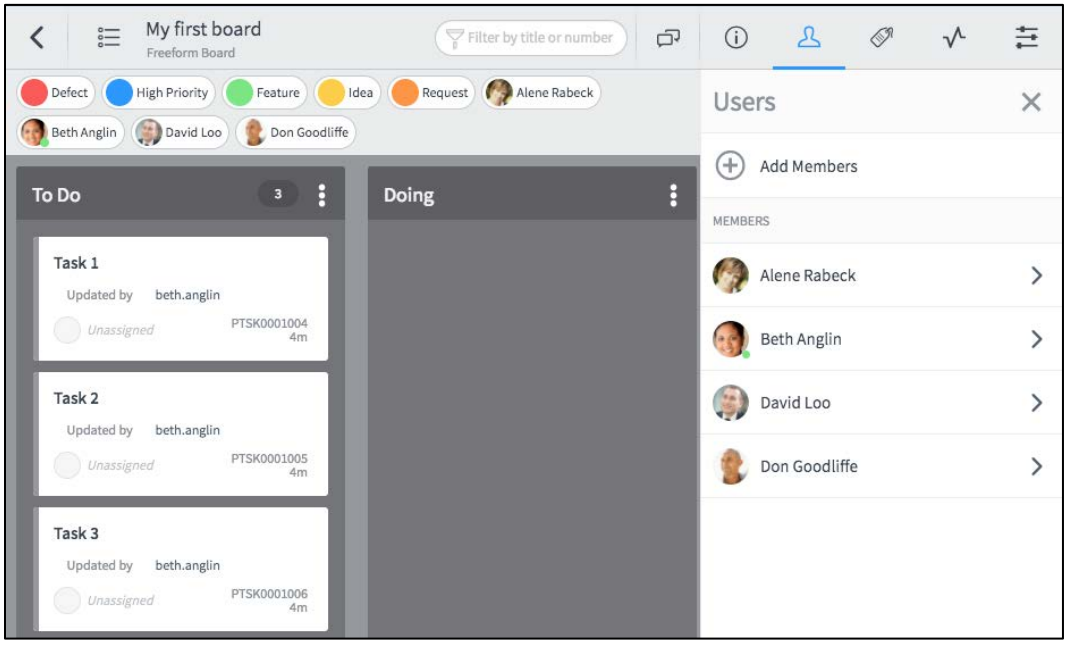




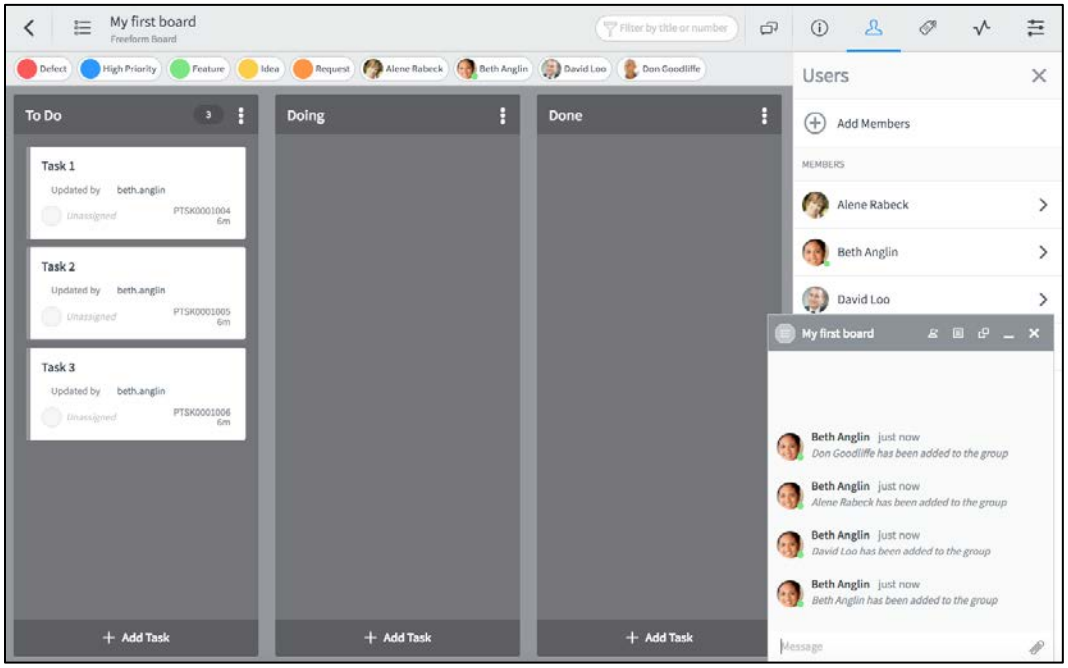
4. Name your board and create a few cards in each lane.



5. By clicking on Members in the Navigation bar, you can add **David Loo**, **Don Goodliffe** and **Alene Rabeck** to this board as members so that they can see your progress.

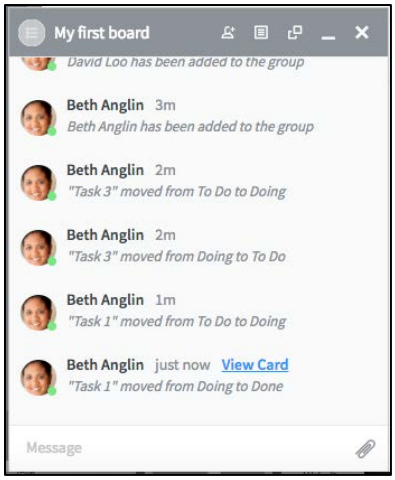


6. Connect with your board members by starting a collaboration session via Connect. Click the **Chat** icon next to the board name to initiate a real-time conversation.



Note: All board members are automatically added to a new Connect conversation.

7. Move one of your cards from the **Doing** lane to **Done** while keeping Connect Mini open.



Note: Board activity is reflected in the Connect group chat now.

Lab Goal

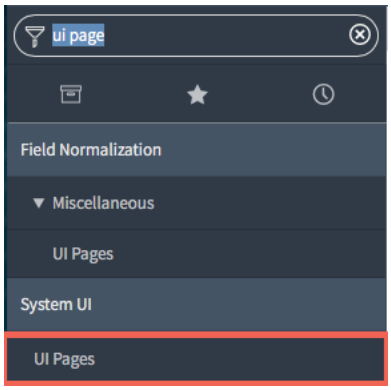
Lab 10.0 Add a Visual Task Board to a Home Page

This lab explains how to add a Visual Task board (screen and board) to a Home Page to combine different widgets with a VTB to have a centralized overview of information. The lab includes the following tasks:

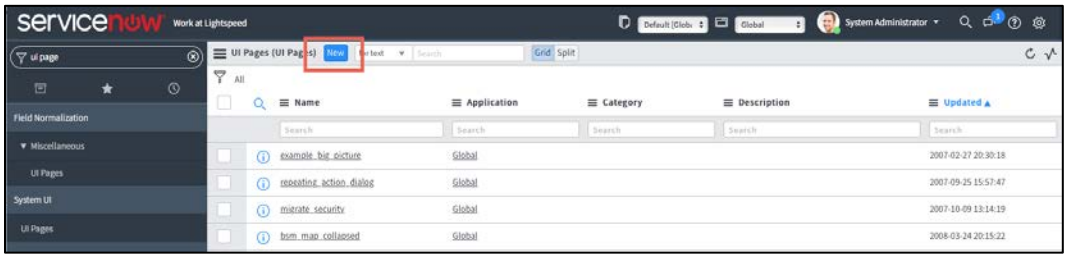
- Create a UI Page and Widget
- Add the Widget to a Homepage
- Modify the vtb_page

Create a UI Page and Widget

1. Go to **System UI > UI Page**.



2. Click **New** to add a **new UI Page**.

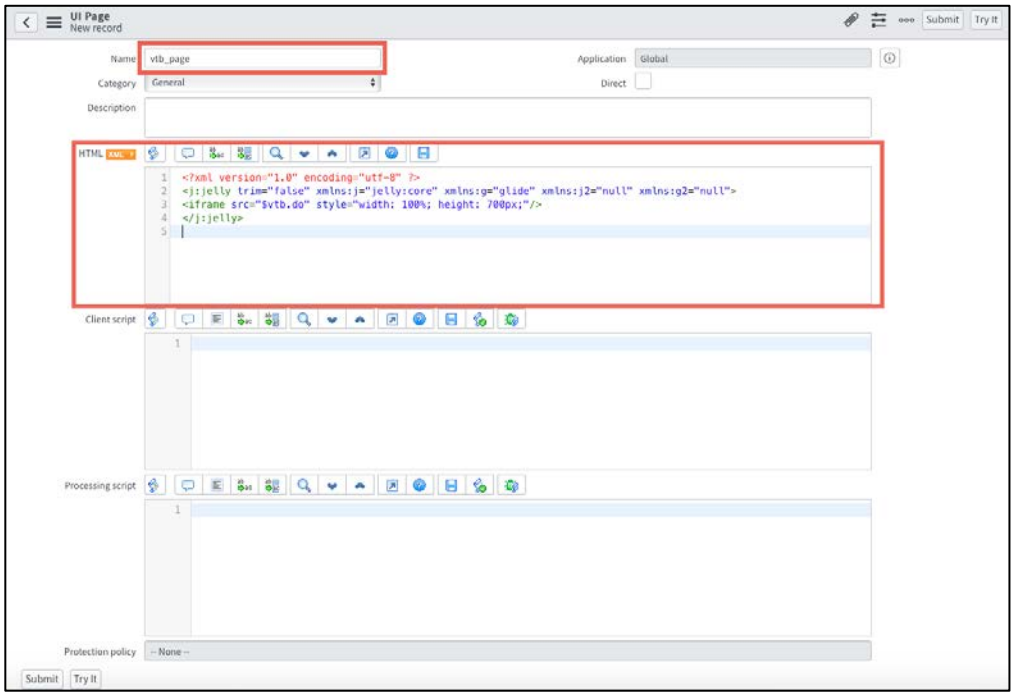


3. Add the name and the script in the new record.

   Name: vtb_page
   Script:

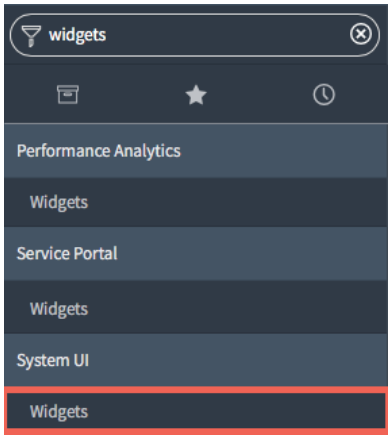
```
<?xml version="1.0" encoding="utf-8" ?>
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null" xmlns:g2="null">
<iframe src="$vtb.do?sysparm_board=aca3c06ddbf13200580ed211ce961904" style="width: 100%; height: 700px;"/>
</j:jelly>

```

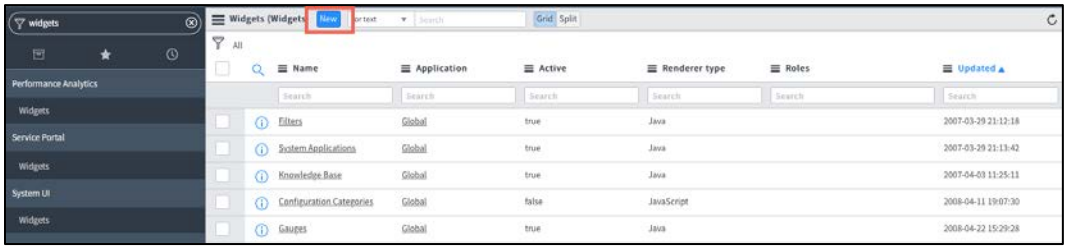


4. Click **Submit** when ready.

5. Go to **System UI > Widgets**.



6. Click **New** to create a **new Widget**.



7. Add the Name and Script to the new Widget record.

   Name: Visual Task Board.
   Script:

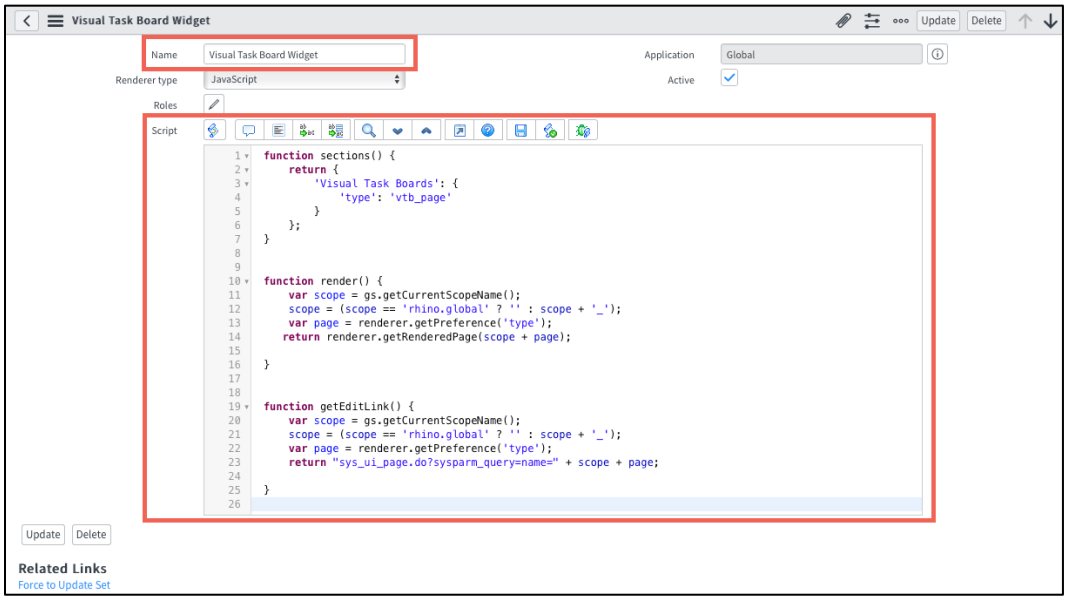
```
function sections() {
    return {
        'Visual Task Boards': {
            'type': 'vtb_page'
        }
    };
}


function render() {
    var scope = gs.getCurrentScopeName();
    scope = (scope == 'rhino.global' ? '' : scope + '_');
    var page = renderer.getPreference('type');
   return renderer.getRenderedPage(scope + page);

}


function getEditLink() {
    var scope = gs.getCurrentScopeName();
    scope = (scope == 'rhino.global' ? '' : scope + '_');
    var page = renderer.getPreference('type');
    return "sys_ui_page.do?sysparm_query=name=" + scope + page;

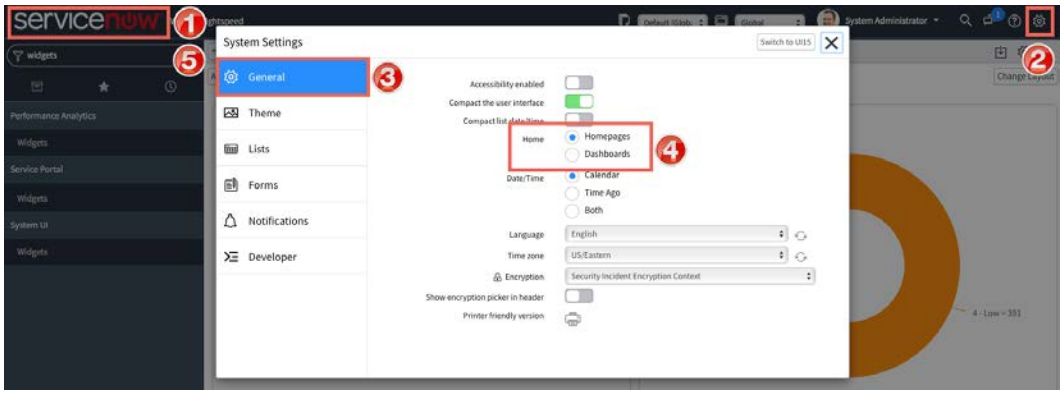
}
```



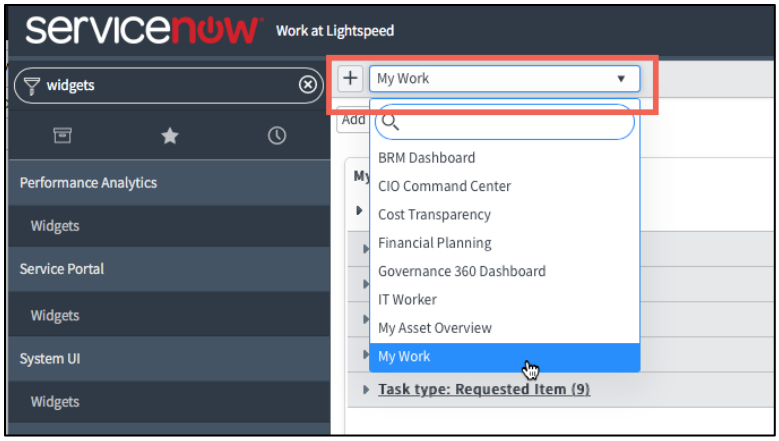
8. Click **Submit** when ready.

Add the Widget to a Homepage

1. Click the **ServiceNow logo** in the upper-left corner.
2. Select the **Settings** icon.
3. Go to **General.**
4. Select **Homepages** in the Home section.
5. Click again on the **ServiceNow** logo.

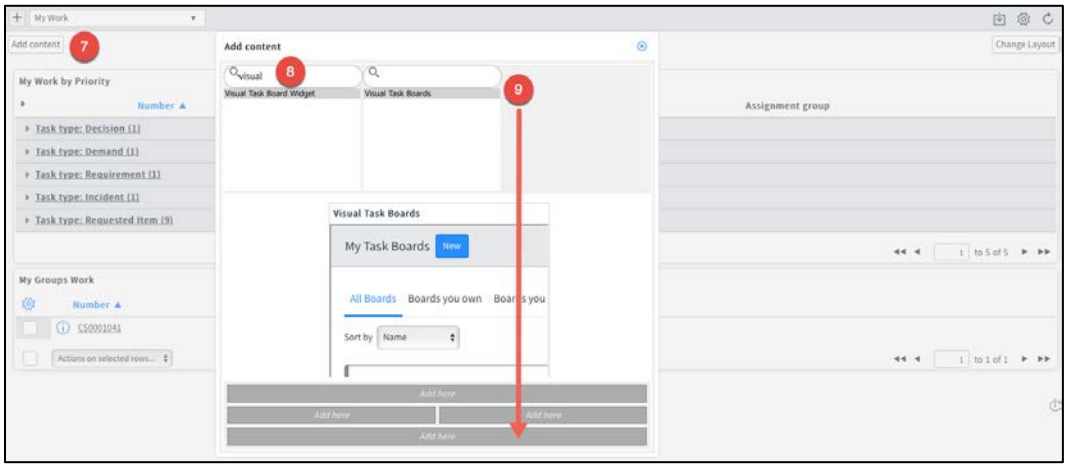


6. Select a Home page (e.g., My Work).

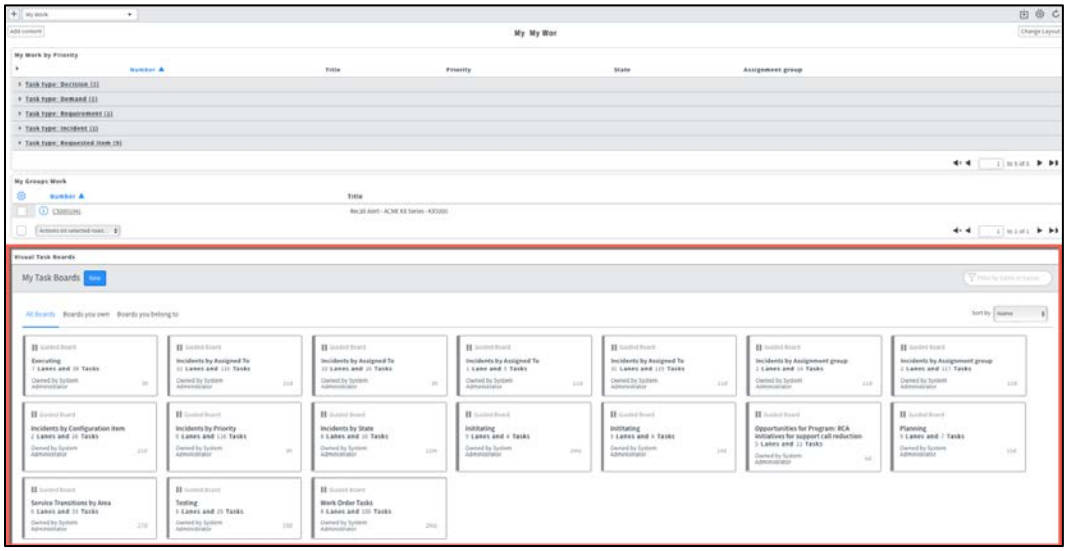


7. Click **Add content**.
8. Filter on **Visual Taks Bord**.

9. Drag and drop the **Widget** to block.



10. Return to the Home page to verify if the **VTB screen** is now visible.



Modify the vtb_page

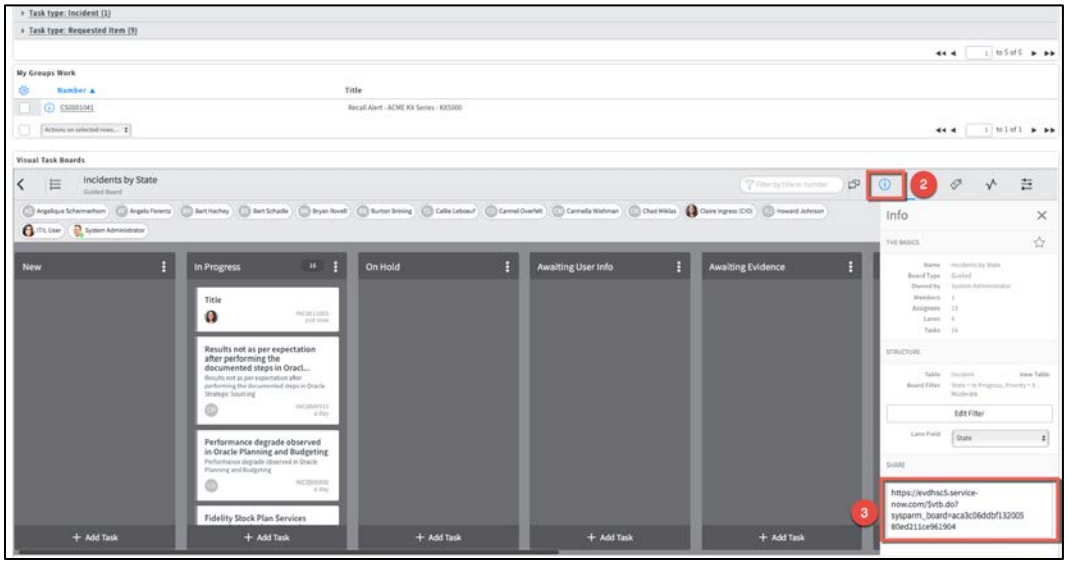
From the Home page, all relevant Task Boards are selectable. If you'd like to have a Visual Task Board in the screen, you have to change the **vtb_page**.

1. Open a VTB.

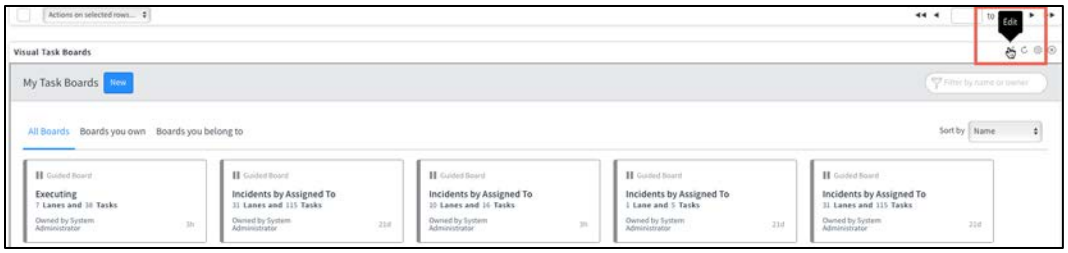
2. Click on **Menu**.

3. Copy the string started from the question mark.

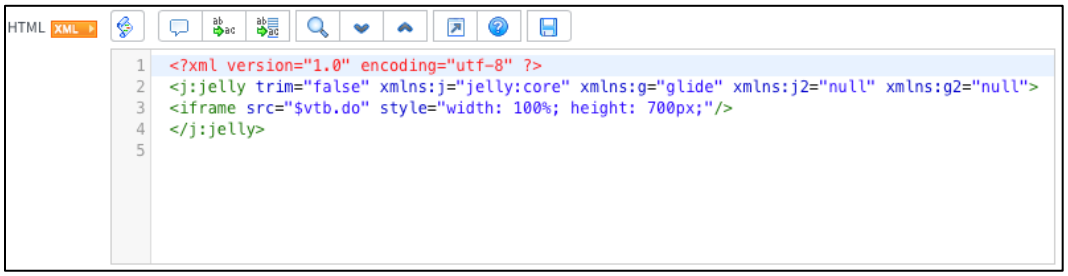
   (e.g., ?sysparm_board=aca3c06ddbf13200580ed211ce961904)



4. Return to the dashboard and click on the **Widget edit** icon.



5. Change the script by adding the string copied from the VTB.





6. Click **Submit**.

7. Return to the Home page (click the ServiceNow logo).

8. Verify that the Widget now shows the preferred Visual Task Board.

