

Taskray Onboarding 101

The complete guide to getting started with Taskray.

TASKRAY MORE THAN
PROJECT
MANAGEMENT

Provided by  **Spekit**



Spekit Main Prod Org



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1. 1. Taskray Onboarding Training Overview 🎨

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Definition

This Onboarding Training sequence will cover the following topics:

1. Accessing Taskray

- [Lightning](#)
- [Classic](#)

2. [Taskray Structure Basics](#)

- [Projects](#)
- [Task groups](#)
- [Tasks](#)
- [Checklists](#)

3. [Taskray Project Views](#)

- [My Work View](#)
- [Kanban View](#)
- [Row View](#)
- [Plan View](#)
- [Calendar View & Agenda](#)
- [Portfolio](#)
- [Template Performance View](#)

4. [Toolbar](#)

5. Sidebars

- [Left Sidebar](#)
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6. [Info Tab](#)

7. [Template](#)

8. [Hands-On Exercise](#)

2. 2a. Accessing Taskray - Lightning

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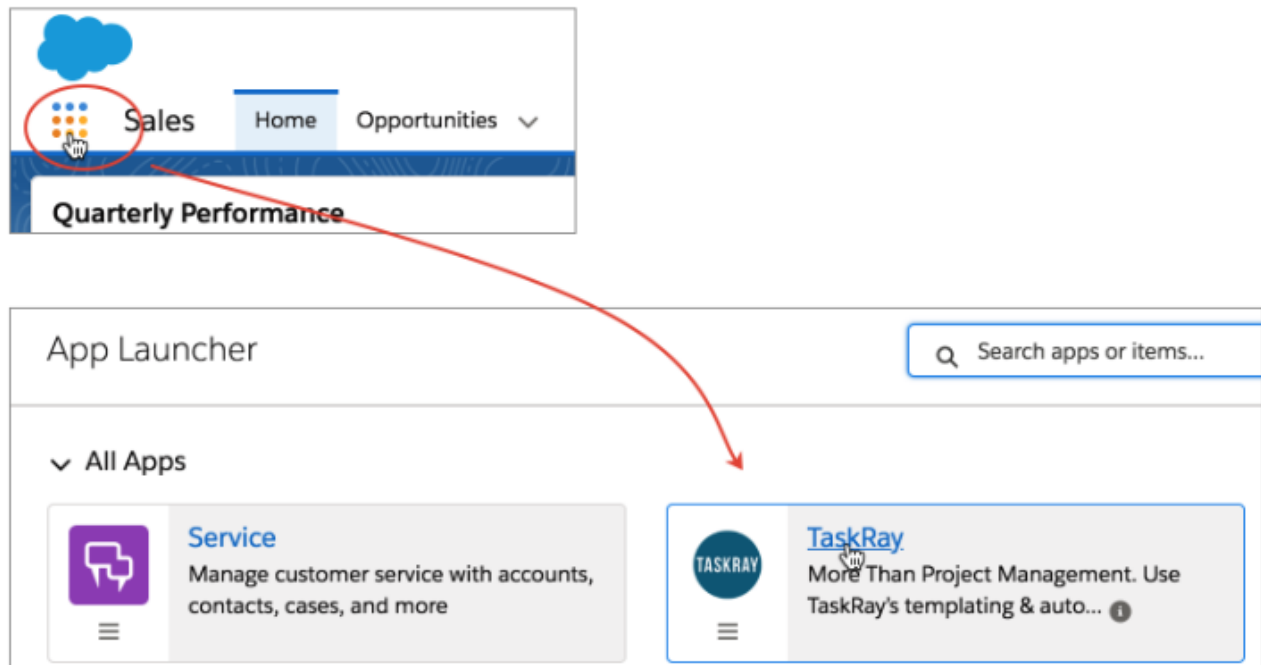
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Definition

The TaskRay Lightning App will allow users to access TaskRay and manage projects and tasks all in one place.

To access, click on the **App Launcher** icon in the Salesforce navigational toolbar and select the **TaskRay app** from one of the tiles.

Once selected, users should see a set of predefined tabs in the Salesforce navigational toolbar along with a tab to access the TaskRay app.



3. 2b. Accessing Taskray - Classic

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Definition

If you are using Salesforce Classic, you can find the TaskRay app by clicking on the **App Menu** in the top right corner of the page and selecting TaskRay.

This will display a set of predefined tabs along with a TaskRay tab to access the app.

TaskRay will have full functionality when accessed through Salesforce Classic.

4. 3. Taskray Structure Basics 🧩

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Definition

As you begin working in TaskRay, it is important to understand the basics of how you can structure your work. In summary, TaskRay is a collection of custom objects.

The main objects in TaskRay are:

- **Projects**
- **Task Groups**
- **Tasks**
- **Checklists**

The next few Speks will go over the uses for each of these objects and provide an idea of how you can incorporate each of them into your **project management process**.

5. 3a. Taskray Structure Basics - Projects

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Definition

Projects:

Projects are the top level object in the TaskRay schema. They can be used to hold a series of tasks that need to be completed to meet a specific outcome or to achieve larger business goals.

Projects can have **defined start and end dates** for completing work to reach a specific goal, or they can be used for **ongoing purposes** (no clear start or end dates).

Additionally, Projects can be used for **reporting**.

6. 3b. Taskray Structure Basics - Task Groups

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Definition

Task Groups:

While not required, **Task Groups** are a great way to **define the structure of projects** and keep tasks organized, thus improving visibility and manageability.

Task Groups can be used to **keep related tasks together** by representing phases, sprints, themes, or any other attributes that are relevant to the project.

Additionally, Task Groups can be used for **reporting purposes**.

7. 3c. Taskray Structure Basics - Tasks

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Definition

Tasks:

Tasks are the core object in TaskRay and are the main object most users interact with. You can think of tasks as pieces of work that need to be completed in order to reach a larger end goal.

In TaskRay, you can add tasks to projects or, if using task groups, add tasks directly to task groups. **Tasks can be scheduled**, allowing you to set deadlines and create dependencies between them.

As tasks are being worked on, they are moved through the **defined stages**, or status lists, of the project where the final status generally indicates task completion.

8. 3d. Taskray Structure Basics - Checklists

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Definition

Checklists:

Checklist Items are **granular steps within tasks**. They are intended to divide and detail out steps for tasks that may require multiple contributors. They are not as customizable as projects and tasks, but they are a custom object that can be automated, tracked, and reported on.

As you work on tasks, you can use Checklists to make sure that you address every **detail of the task** at hand.

You can then check off checklist items to track your progress.

9. 4. Taskray Project Views

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Definition

The TaskRay toolbar is organized into three tabs:

1. My Work tab:

- provides access to your personalized workspace where you can manage all of the tasks and checklists that are assigned to you, as well as view notifications.

2. All Work tab:

- Includes four other views that you can switch between using the icons in the tab. these include:
 - Kanban
 - Row
 - Plan
 - Calendar

3. Portfolio View:

- Under the Performance tab, **the Portfolio View** provides a way to view all or a subset of projects and task groups in a list format. In this view, you can view project information and get high-level project health insights.

Also, under the Performance tab, the **Template Performance View** is a place where you can view metrics for any TaskRay template that is used in your organization.

The next few Speks will cover these views in detail.

10. 4a. My Work View

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Definition

My Work View is a centralized place where you can view and manage all of the tasks and checklist items that are assigned to you, similar to a personalized to-do list.

By default, you will have three options for organizing and grouping tasks in this view:

1. **End Date**

1. **Start Date**

1. **Priority.**

This view allows you to view your tasks and checklist items, change their status, and complete them.

You will also see a **Notifications pane**, which will contain in-app notifications that are relevant to your work.

11. 4b. All Work - Kanban View

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Kanban View allows you to manage projects and tasks like **sticky notes on a whiteboard**. Tasks are color-coded by project for quick visual reference (project colors can be seen in the left sidebar).

By default, this view has four columns that represent different stages of the project:

1. **Holding**

1. **Prioritized**

1. **Started**

1. **Finished.**

Tasks can be moved across columns using **drag and drop** actions or by using the **Arrow** icon located on every task card.

(Click on the image to expand)

12. 4c. All Work - Row View

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Definition

In Row View, you can **group tasks** by standard and custom fields, which allows you to reorganize the list of tasks based on the specified criteria.

Using **drag and drop**, tasks can be moved between groupings. When you move a task from one grouping to another, the task details get updated based on the new grouping field value.

It is also possible to **add tasks** directly to groupings, which automatically assigns the associated grouping value to the new task.

13. 4d. All Work - Plan View

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Definition

Plan View is a **gant-like chart** for projects and tasks. In this view, you can create dependencies, schedule and reschedule tasks using drag and drop, as well as view the overall **project progress** with percentage complete status bars.

Plan View can display how tasks and projects are distributed throughout days, weeks, months, and years.

The taskbars are **color-coded** by task status, matching the colors of the columns from the Kanban View. However, if a task becomes overdue, the taskbar in Plan View will turn red regardless of its status (except Finished).

14. 4e. All Work - Calendar View

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Definition

Calendar View visualizes task distribution and allows you to **schedule and adjust** task durations using drag and drop actions. Tasks are color-coded by project for quick reference.

From Calendar View, you can also view a task **Agenda**, which organizes tasks in chronological order and groups them by days of the week.

Each task on the Calendar and the Agenda has a **checkbox** that represents whether the task is complete. This checkbox can be checked to complete the task and **update its status**.

Calendar View- Agenda

Both the Calendar View and the Agenda can be printed by clicking on the **Print** button in the Calendar/Agenda toolbar.

15. 4f. Portfolio View

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Definition

Project View provides a way to view all or a subset of projects and task groups in a **list format**. In this view, you can view project information and get complete project health insights.

The list of projects on the board is controlled using the **Project Filters** menu at the top of the page. Using this menu, you can select to view all projects, projects that meet specific criteria, or even select to view a specific project. Additionally, the Project Filters menu allows you to create new custom project filters if needed.

In this view, you can also view complete **project health insights** in the right sidebar. Using the checkboxes next to project names, select projects and open the right sidebar **Info** tab. This will show you information and allow to make **charts** on the selected projects and their tasks, including archived tasks if there are any.

16. 4g. Template Performance View

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Definition

This view is a centralized place for analyzing the performance of any template that is used in your organization.

After selecting a template, you will see a summary of template targets, template averages (based on projects and task groups created from the template), as well as view any trends associated with the template.

Using that information, you will have **insight** into how the average performance of projects aligns with set template targets, allowing you to take **action** to further optimize the process if needed.

17. 5. Toolbar

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Definition

- The **Work tab** provides access to the four views designed for working on projects and tasks:
 - Kanban
 - Row
 - Plan
 - Calendar.
- **Show/Hide Lists** allows filtering tasks by status list ([i.e.](#) columns in Kanban View). When a status list is selected in this menu, all of the tasks from that list become hidden across the four Work views.
- **Search** is used to quickly locate a project/task group/task.

18. 6a. Sidebars - Left Sidebar

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Definition

The left sidebar allows you to navigate and filter projects and tasks.

The **Board Filters** section includes standard and custom board filters, which help control the project list in the **Projects** section, as well as the visible tasks on your board.

You can also specify which of the default board filters you want to see in the sidebar through the Settings. The sidebar can be hidden or expanded as necessary.

19. 6b. Sidebars - Board Filters

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Definition

Board filters are essentially a **combination** of project and task filters, which are designed to help you keep your workspace **organized** in TaskRay.

In the Work tab, board filters are located in the left sidebar and you can navigate between them to **filter the list** of projects in the sidebar, as well as the tasks that are visible on the board.

Out of the box, TaskRay comes with a set of the **most commonly used** board filters, plus a bonus Power Filter mode.

20. 6c. Sidebars - Right Sidebar

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Definition

- **Team:** Shows all of the team members for the selected project(s).
- **Feed:** Displays all recent Chatter activity for the selected project(s).
- **Files:** Lists all of the uploaded files for the selected project(s).
- **Time (if enabled):** Shows logged time entries and allows adding new time entries to tasks.
- **Assistant:** Contains sections that display tasks that need attention. Hidden if no tasks meet criteria.

21. 7. Info Tab

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Definition

When in any of the TaskRay Work views (Kanban, Row, Plan, or Calendar), the Info tab in the right sidebar will reflect the tasks that are visible on the board. Therefore, if the project(s) that you are viewing contains any archived tasks, the data from those tasks will not be reflected in the Info tab.

- **Info:** Contains aggregate information for selected projects: Insights and Charts.
- **Insights:** Displays information such as Snapshot, Milestones, Tasks At Risk, and Tasks By Team Member.
- **Charts:** Allows to compare and chart task data using multiple types of charts

22. 8. Templates 🧩

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Definition

Let's say that your organization has some sort of a process, or project, that occurs on a **repeatable basis**. To streamline the repeatable process, TaskRay allows you to create project templates, which can include all of the steps, or tasks, of the process.

These templates can then be **cloned** to create new projects, keeping all of the project details, tasks, and other specifications.

Use this slide plus additional slides to list the templates you have created for your organization to utilize.

It includes:

- Name of the template
- How projects will get created from templates (manually vs automatically)
- If manually then WHO will be creating the projects
- If automatically then what triggers the template clone

23. 9. Hands On Exercise 🎮

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Definition

1. Login to Salesforce and navigate to TaskRay
2. Go to My Tasks
3. Update the Task Status
4. Repeat in a different view
5. Use Chatter to communicate with a team member directly in the Task Feed
6. Find a Task with checklist items and check off some of the items