

The background of the slide is a faded, sepia-toned photograph of a steam locomotive engine. The locomotive is positioned on the left side of the frame, with its front and side visible. The image is partially obscured by a large, white, arrow-shaped graphic that points from the left towards the center. The Georgia Tech logo, consisting of the letters 'GT' in a stylized font, is visible in the upper left corner of the image. The overall aesthetic is clean and professional, with a focus on engineering and technology.

**Georgia  
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CREATING THE NEXT

# Using Visual Task Boards

Quick Reference Guide

# Using Visual Task Boards

A Visual Task Board is a simple, visual way to track tasks and see the status of any task with a quick glance. There are three types of Visual Task Boards (VTB):

**Freeform** – Create your own personal tasks and customizable lanes. Totally customizable and you can create anything you want here.

**Flexible (Data Driven)** – Pull in data from a table, such as Project Tasks or Agile Stories, add additional tasks, create custom lanes, **does NOT update underlying task data.**

**Guided (Data Driven)** – Similar to Flexible board, but lanes correspond to field values and those lane names cannot be edited in most cases. Moving a task between lanes **DOES update** the underlying data. (Steps below show this version of VTB)

1. Click **Visual Task Boards** in the left navigation.

2. Click **Create New Visual Task Board**.

3. Click **Data Driven Board**.

4. In this example, select **Project Task** for the Task Table, and **State** for the Vertical Lane Field. Leave **Swimlane Field** blank for now.

The image shows a sequence of five steps for creating a Visual Task Board:

1. A navigation menu with a search bar containing "visual ta" and a close button. Below the search bar are icons for a folder, a star, and a clock. The "Self-Service" section is visible, and "Visual Task Boards" is highlighted with a blue box and a circled "1".
2. A button labeled "Create New Visual Task Board" with a plus icon, highlighted with a blue box and a circled "2".
3. A selection screen with a green circle containing a calendar icon and the text "Data Driven Board", highlighted with a blue box and a circled "3".
4. A configuration form with three dropdown menus: "Task Table" (selected: Project Task), "Vertical Lane Field" (selected: State), and "Swimlane Field (Optional)" (selected: Select Swimlane Field). The form is highlighted with a blue box and a circled "4".
5. A "Next" button highlighted with a blue box and a circled "5", next to a "Cancel" button.

# Using Visual Task Boards

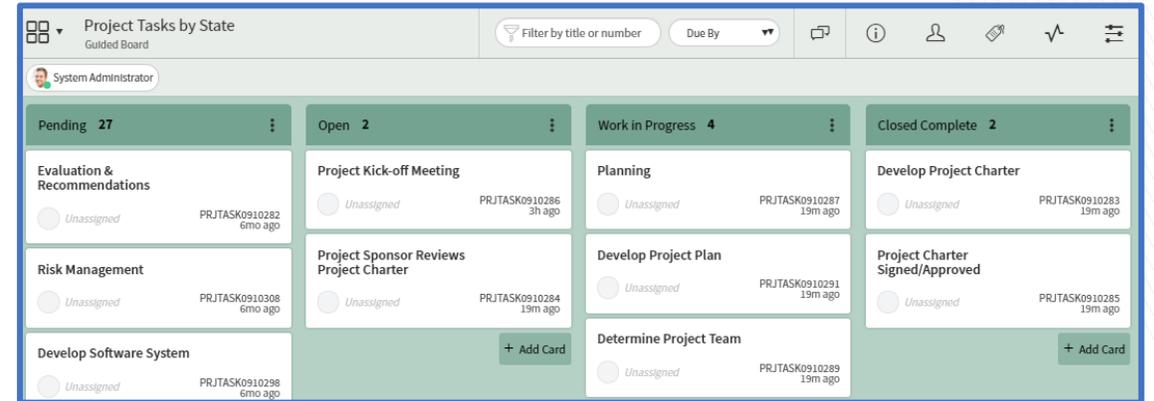
6. Select a field to filter on, such as **Project** and for select **starts with**, then enter the project name.

7. Click **Create**.

8. The VTB displays the data based on the filters you created.

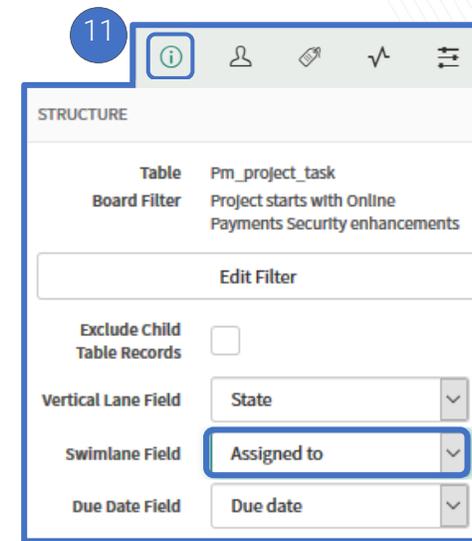
9. Double click to change the name. Notice under the name it says **Guided Board** which indicates changes made on the VTB will change the underlying data on the Project task itself.

10. Click the three dots icon, then select **Hide Lane** to hide vertical lanes you do not need to see.

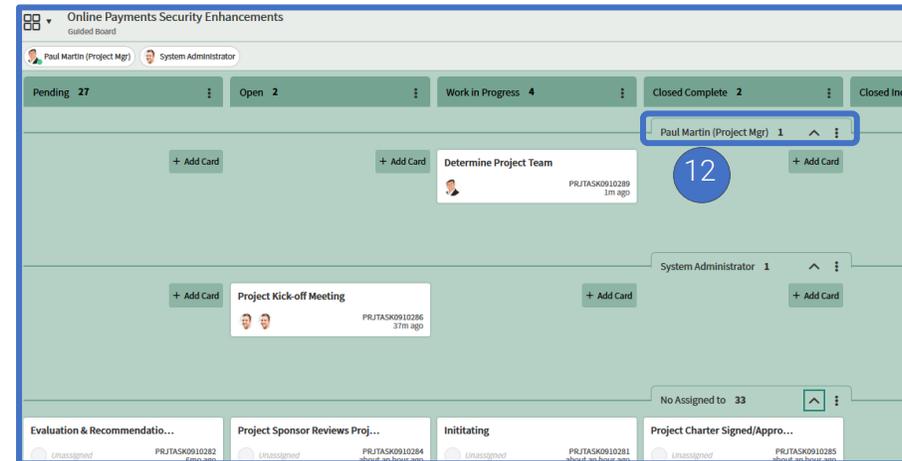


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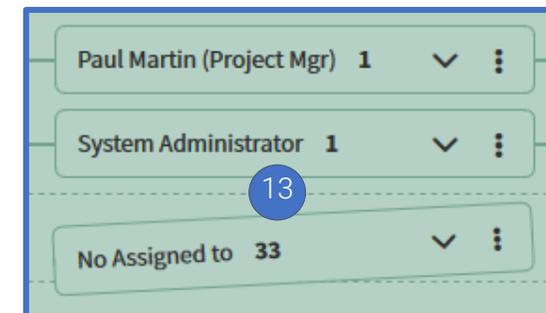
11. Click the info icon to edit the filter, change the Vertical Lane Field or add a horizontal swimlane. In the **Swimlane Field**, select **Assigned to**, then click **Ok** on the popup box.



12. This adds a horizontal swimlane to the VTB and groups it by Assigned to.



13. You can reorder the horizontal swimlanes by grabbing the swimlane "tab" and dragging it above or below other swimlanes.



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14. Click the silhouette icon to share the VTB with others.

15. Click **Add Members**, then search for the members you would like to add.

16. From the Quick Panel at the top, you can drag and drop members into the tasks **Primary (Assigned to)** or **Additional (Additional assignee list)** fields of the task.

