Using Visual Task Board

A ServiceNow Task Management Module

DTi
DELIVERING TECHNOLOGY
THAT INNOVATES

Department of Technology &Information

TABLE OF CONTENTS

VISUAL TASK BOARDS

Visual Task Boards (VTB) transforms the navigation of lists and forms into an interactive graphical experience.

VTBs allows users to create, view and update multiple task records, which appear as cards that can be moved between lanes, activity streams.

To access VTBs from Service Now (SN), on the left navigation, scroll down to "***Self Service"***, you will see the following:
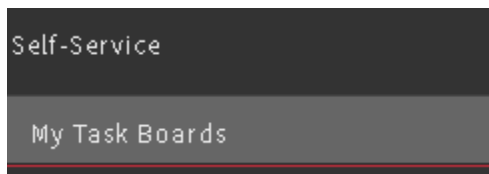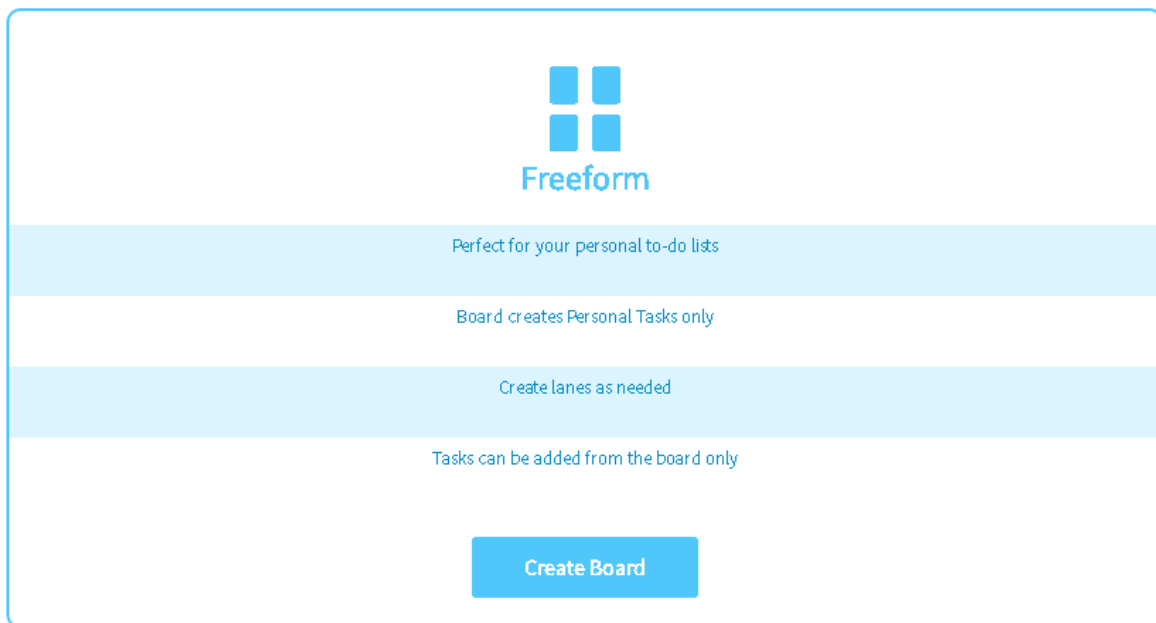
Creating Task Boards

Click on **My Task Boards,** you will see the following:

Welcome to Visual Task Boards!

Enhance the way you work with Visual Task Boards, a powerfully simple way to visualize and interact with tasks on the ServiceNow platform.

Create a Visual Task Board from any list of tasks (Incidents, Problems, Requests, etc.) for a brand new perspective on your teams' work in progress – all at a glance and in real-time.

Freeform

Perfect for your personal to-do lists

Board creates Personal Tasks only

Create lanes as needed

Tasks can be added from the board only

Create Board

If after see the above screen, you click the X on the form you will not see the above again, and will be taken directly into freeform VTB.

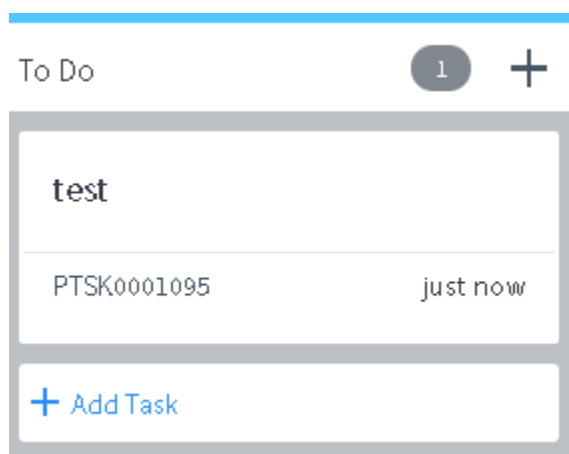Click on *Create Board* to begin using VTBs. You will now see the following:
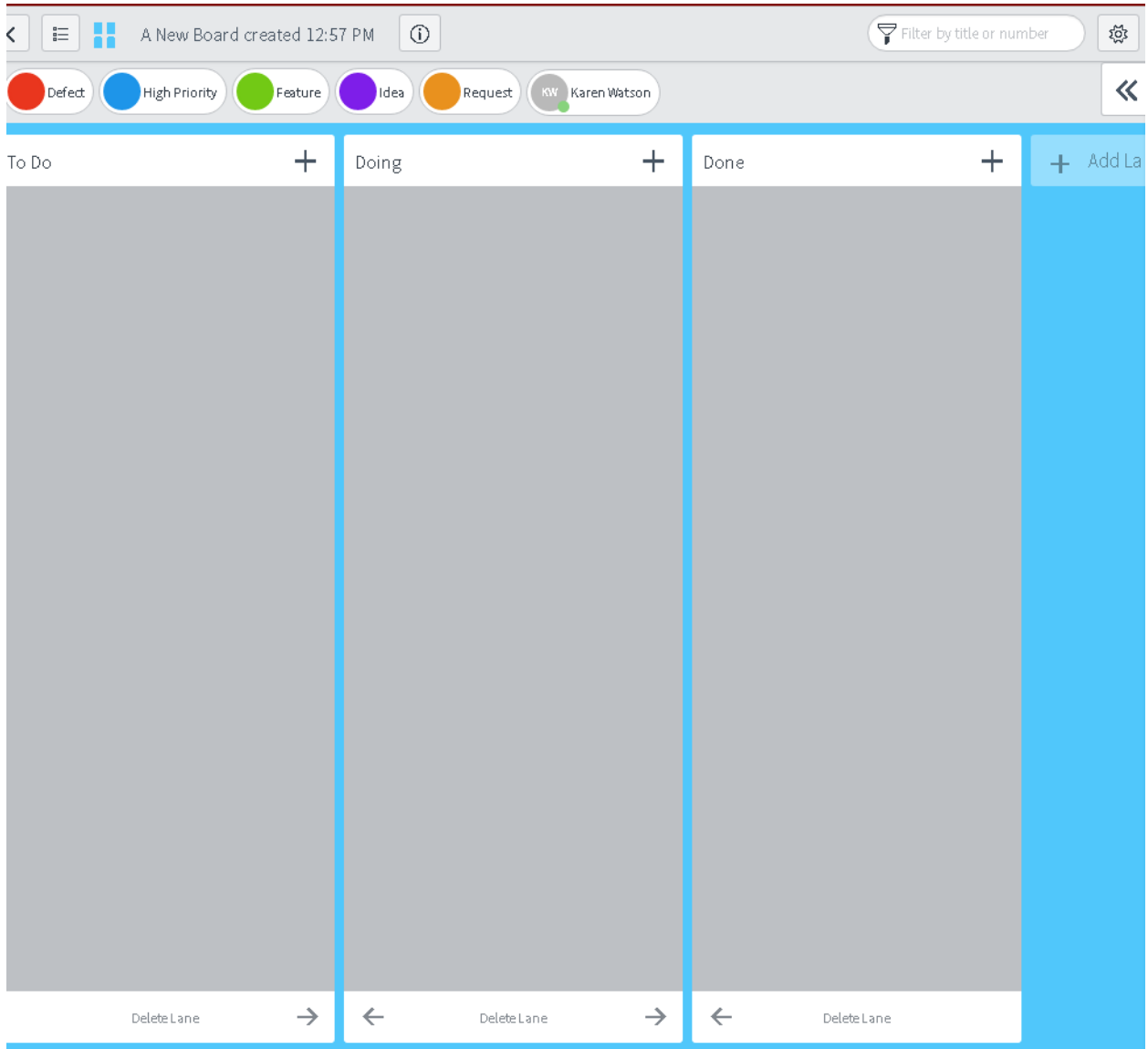
Creating Tasks

At this point you are ready to create and assign tasks. Click on the "*+ sign*" to create tasks.
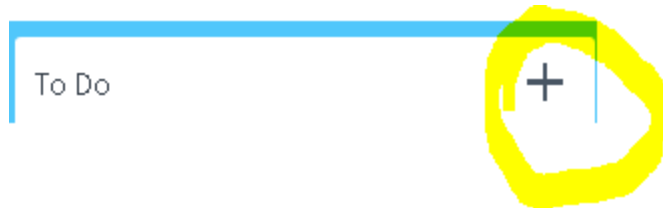
After clicking the plus sign a box will appear:

You will have to enter a name of the task, when you do and hit "*enter*" a new task will be created. You can continue to hit the "*+ Add Task*" to continue creating tasks.

Assigning Tasks

After you have created your tasks, "*double click*" in the task box, the below screen will appear:

There are several things you can do from this screen. You can click "**Add a Description**", to add a description to the task. You can click "**Add a comment**", to add comments.

To assign the task, make sure you are the on the person, see the yellow highlight above, you will then see the Add Primary Assignee link, click the "**Add Primary Assignee**" link and a pop-up search box will appear so you can select the person you want to assign the task to.

To add an attachment to the task make sure you are on the paper clip, select "**Add Attachment**", your document library will appear, select the document you want to add, by either clicking it once, it will be displayed in the file name box at the bottom of the screen, then click "**Open**",
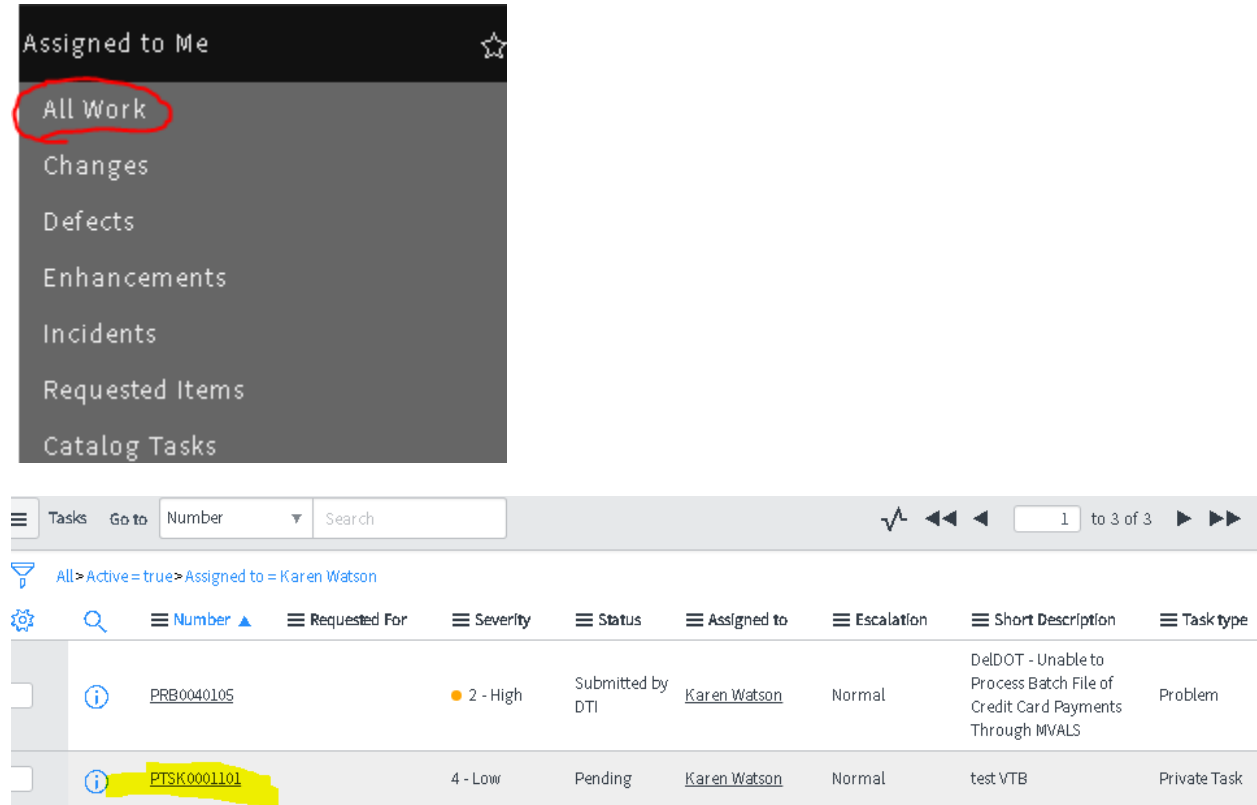

or you can double click on the file you want attached and it will be automatically attached to your task.

Viewing your Tasks

To see all tasks assigned to you from the left nav, click "**Assigned to Me"**, that expands the section. Select the option "**All Work**", all work assigned to you will be displayed in the center of the screen. See the screenshot below:
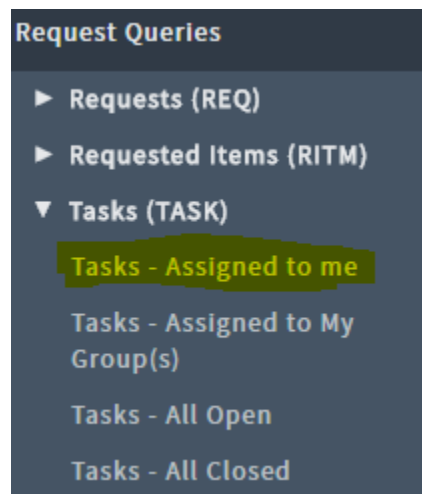

As you can see from the above, one visual task is assigned. Additionally, you will be able to view your visual task from clicking "**Request Queries**", and scrolling down and selecting "**Tasks – Assigned to me**". See the below:

Visual task will begin with PTASK. You will also see your tasks from on the ITIL Homepage and they can appear on your personalized or team homepage.

Processing your Tasks

Everyone that has an assigned task will be displayed on your VTB. The below example have 3 people assigned tasks; they are displayed at the top of the task board. Members of freeform boards have the ability to add and remove task cards and lanes.
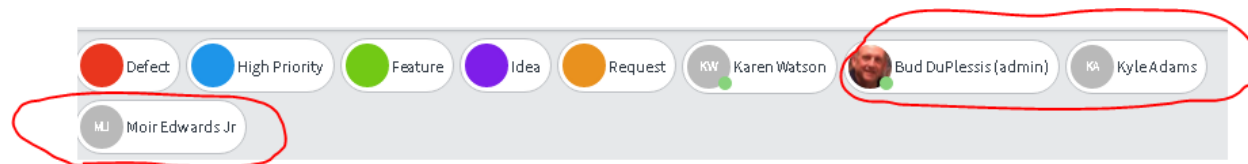
Additionally, as the status of task changes their position in the visual board can be manually moved by either using the arrows at the bottom of the screen or dragging the task to the correct lane, see the below:
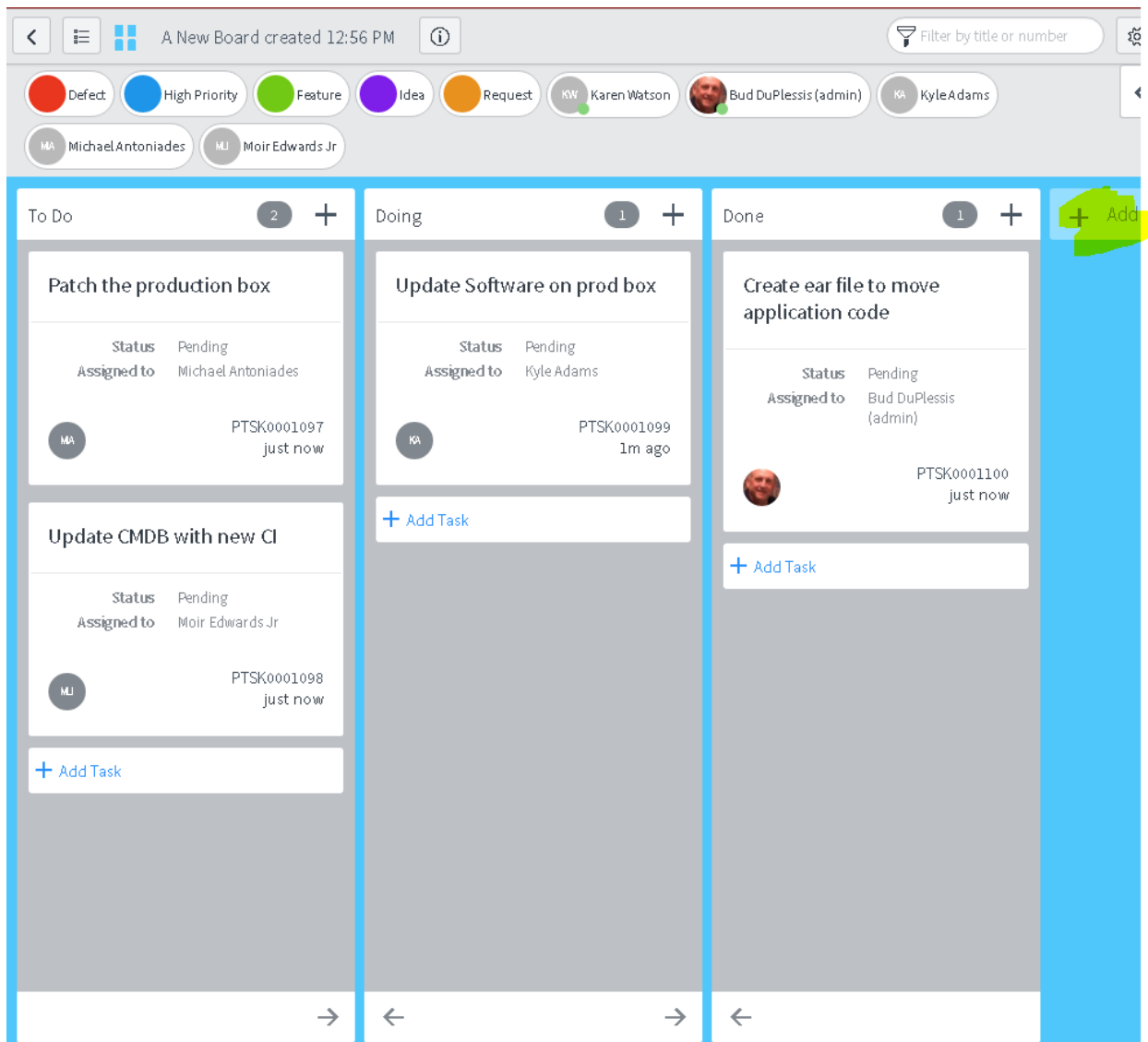
In looking at the above, it shows that two tasks are in the To Do column, one task is in the doing column and 1 task is in the done column. If additional lanes are required click on the "**+ Add Lane"**, you will be prompted to add a name to the new lane.

Additional Visual Task Board Types

In addition to the freedom task board, there are also a guided and a flexible task boards. Flexible boards and Guided boards work off of filters. Members of flexible and guided boards can add task cards; however, the cards are automatically removed when the task no longer match the filter conditions. Members of Flexible boards can define custom lanes, similar to freeform boards. However, Guided board lanes correspond to field values and cannot be edited.

For more information on Flexible and Guided Task boards please email the ServiceNow team at dti_servicenow_admin@state.de.us

For more information on Visual Task Boards, use the below link:

https://docs.servicenow.com/bundle/geneva-servicenow-platform/page/use/visual_task_boards/concept/c_VisualTaskBoardUse.html