



meister
task

User Guide



About MeisterTask



MeisterTask is an intuitive task management tool that improves teamwork and collaboration. Its flexible, Kanban-style project boards ensure that everybody in your team is always on the same page.



MeisterTask is an online tool that runs in any standard web-browser and offers apps for Mac, Windows, iOS and Android.



MeisterTask was created for agile teams looking for a smarter, more efficient workflow. You can turn it into a true productivity hub by connecting it with other tools you use, and automate tasks to get even more done in less time!

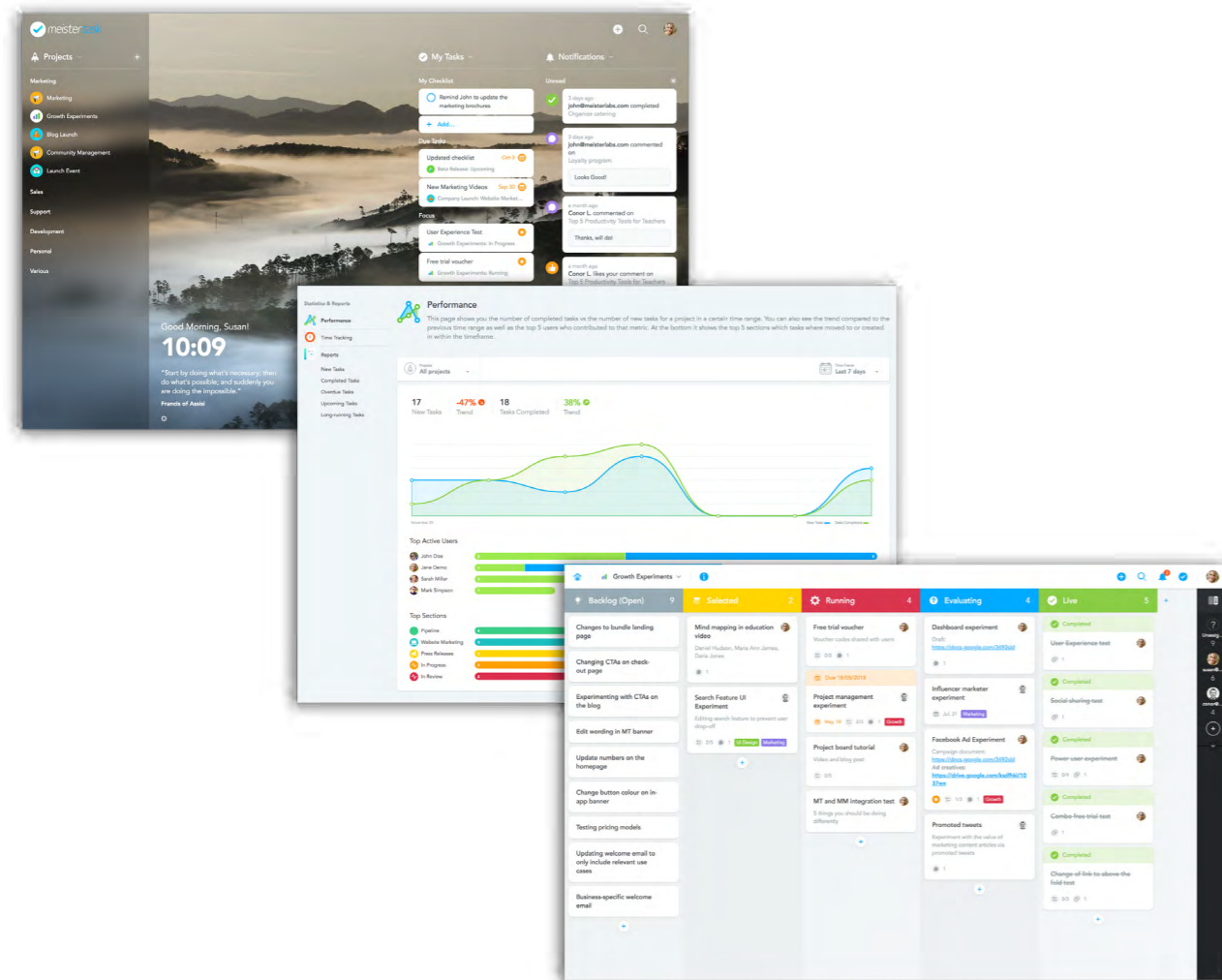
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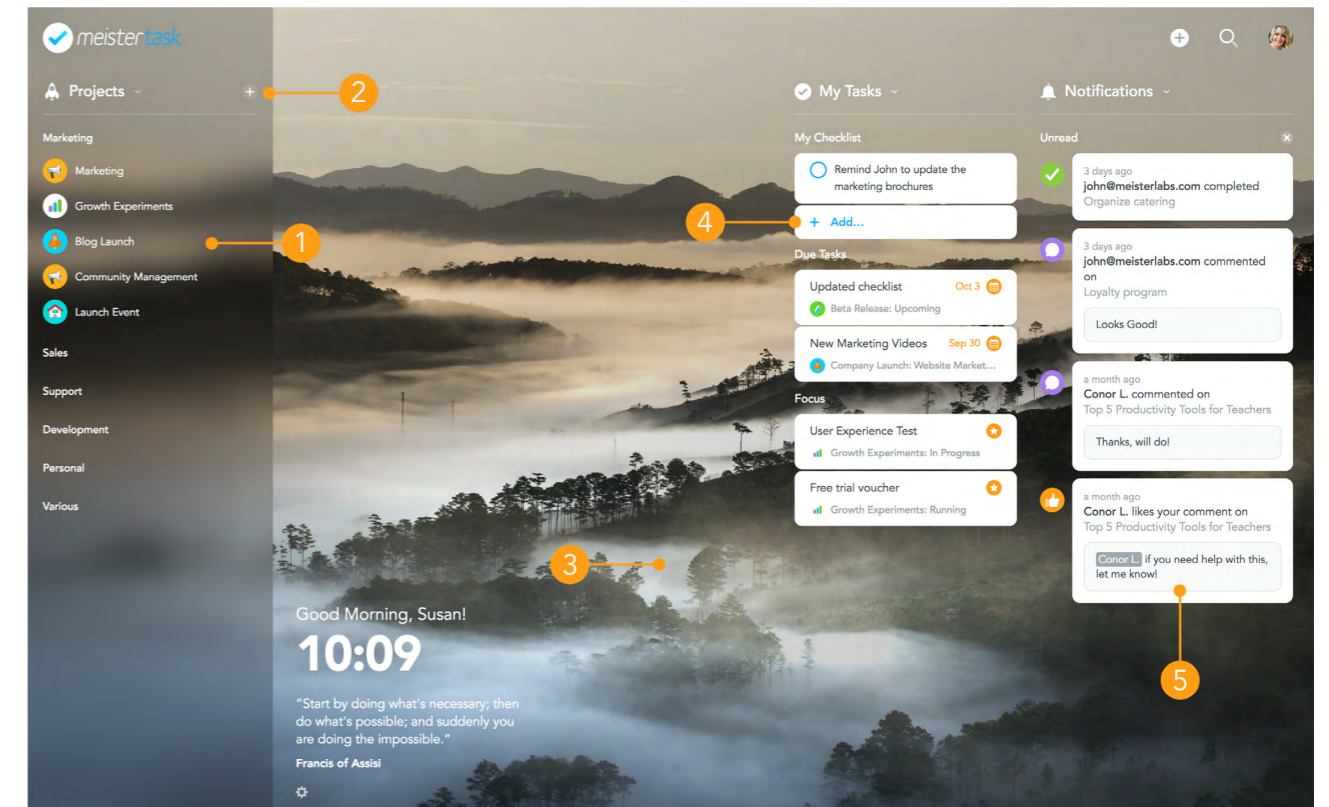
1. Getting Started

In MeisterTask, you switch between three main views:

1. The **DASHBOARD**, which offers a personalized overview of all your projects, notifications and tasks. This view is unique to every user.
2. The **PROJECT BOARDS**, which are divided into vertical sections that tasks can move through on their way to completion. Changes made to a shared project board are instantly visible to all project members.
3. The **STATISTICS & REPORTS** area, which offers insights into your team's productivity and tracked time. This area also includes a simple calendar view. It's accessible for all **PRO** and **BUSINESS** users.



2. The Dashboard



1. Project List

The project list on the left displays all your active projects.

You can re-order projects by dragging them into another position, or create project groups for a better organization. To display archived or team projects, click on the word 'Projects' and select a different view.

2. Create or Import Projects

Use the + button to create a new project from scratch or to import an existing project from Trello, Asana or Wunderlist.

3. Background Image

Upload a background image

that reflects your mood or let MeisterTask display a different one for you every day.

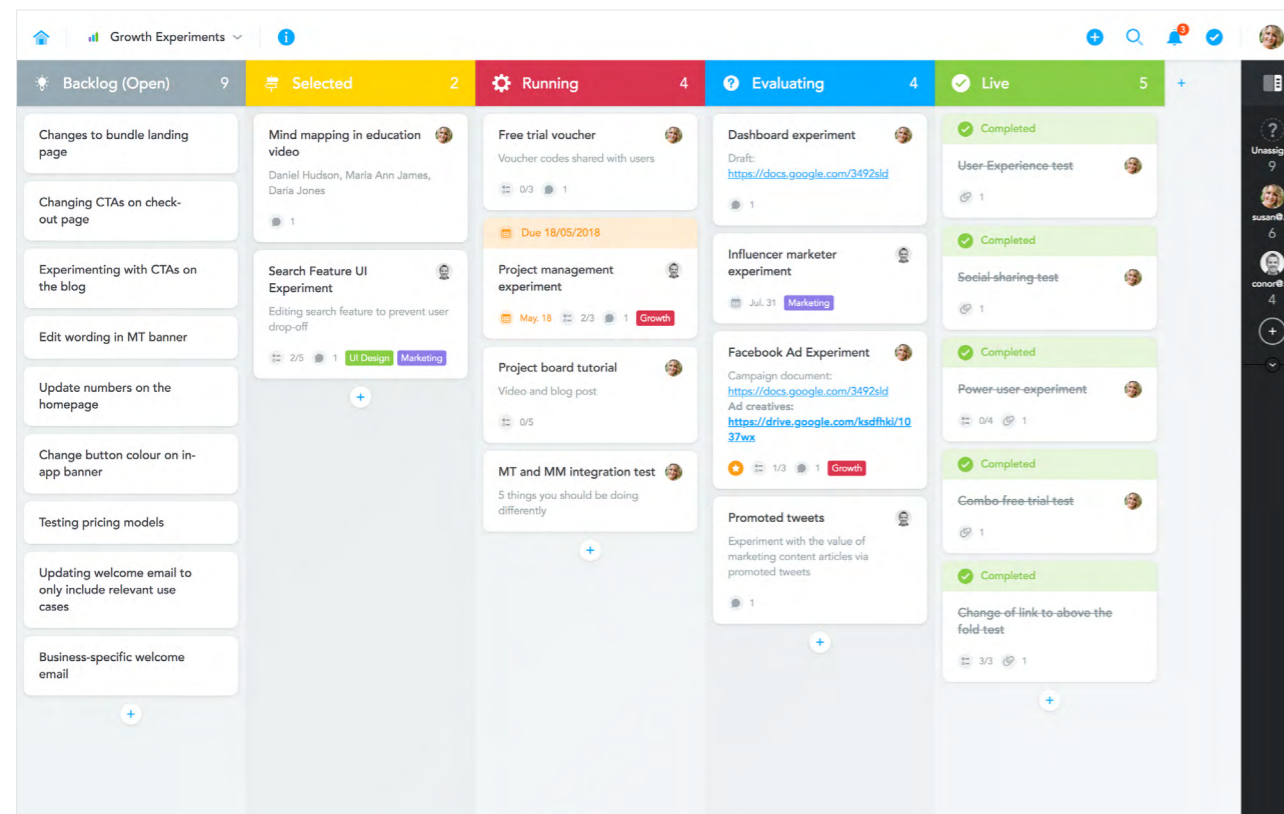
4. My Tasks

This is where you see a list of your open tasks, starting with due tasks and tasks in your FOCUS. At the top, you can also display a personal checklist that is not associated with any project.

5. Notifications

Notifications keep you up to date about what's happening in your team. You'll get notified whenever someone mentions you in a comment or makes changes to a task you are *watching*.

3. Projects



Sections

A project is divided into multiple sections. How many sections you have and how you name and arrange them is totally up to you. To edit the name, color or icon of a section, click into the section header. To add a new section, click on the + button that appears when you hover between two section headers. Rearrange sections via drag and drop.

Tasks

All tasks related to a project are displayed in the form of tiles that can be moved freely from section to section. Due or overdue tasks turn yellow. Old and inactive tasks turn gray. You can create new tasks using

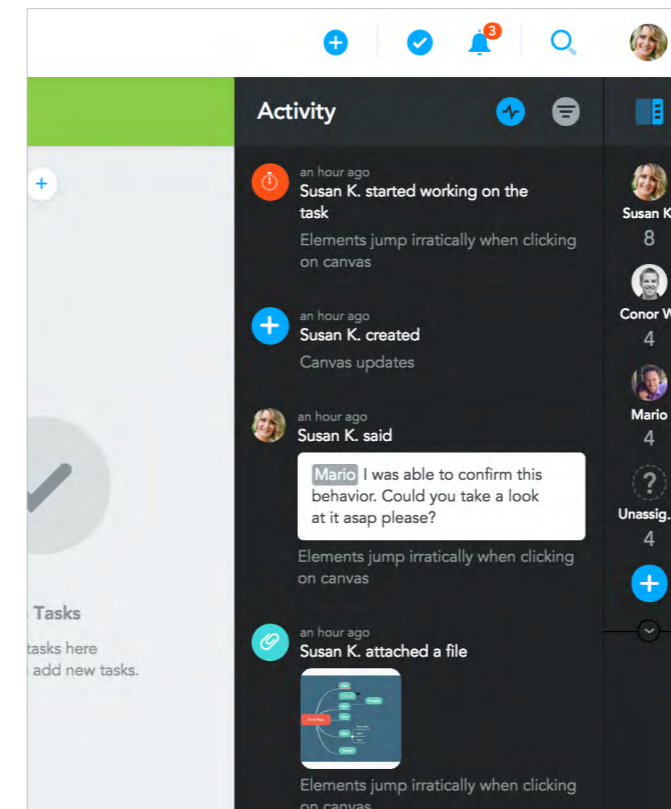
the + buttons at the bottom of each section, or using the N key as a shortcut.

Project Background

Choose between various background colors and images or simply upload your own, via the project properties (i).

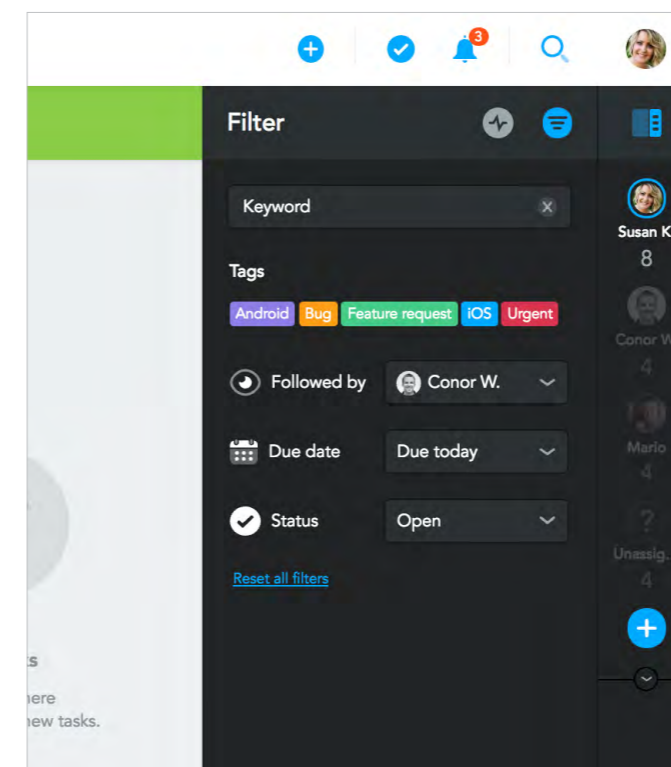
Members Bar

The members bar on the right shows the avatars of all project members along with the number of active tasks they own in it. Click on an avatar to quickly filter the project for tasks assigned to that specific team member. Click on the + button to invite more people to the project.



Activity Stream

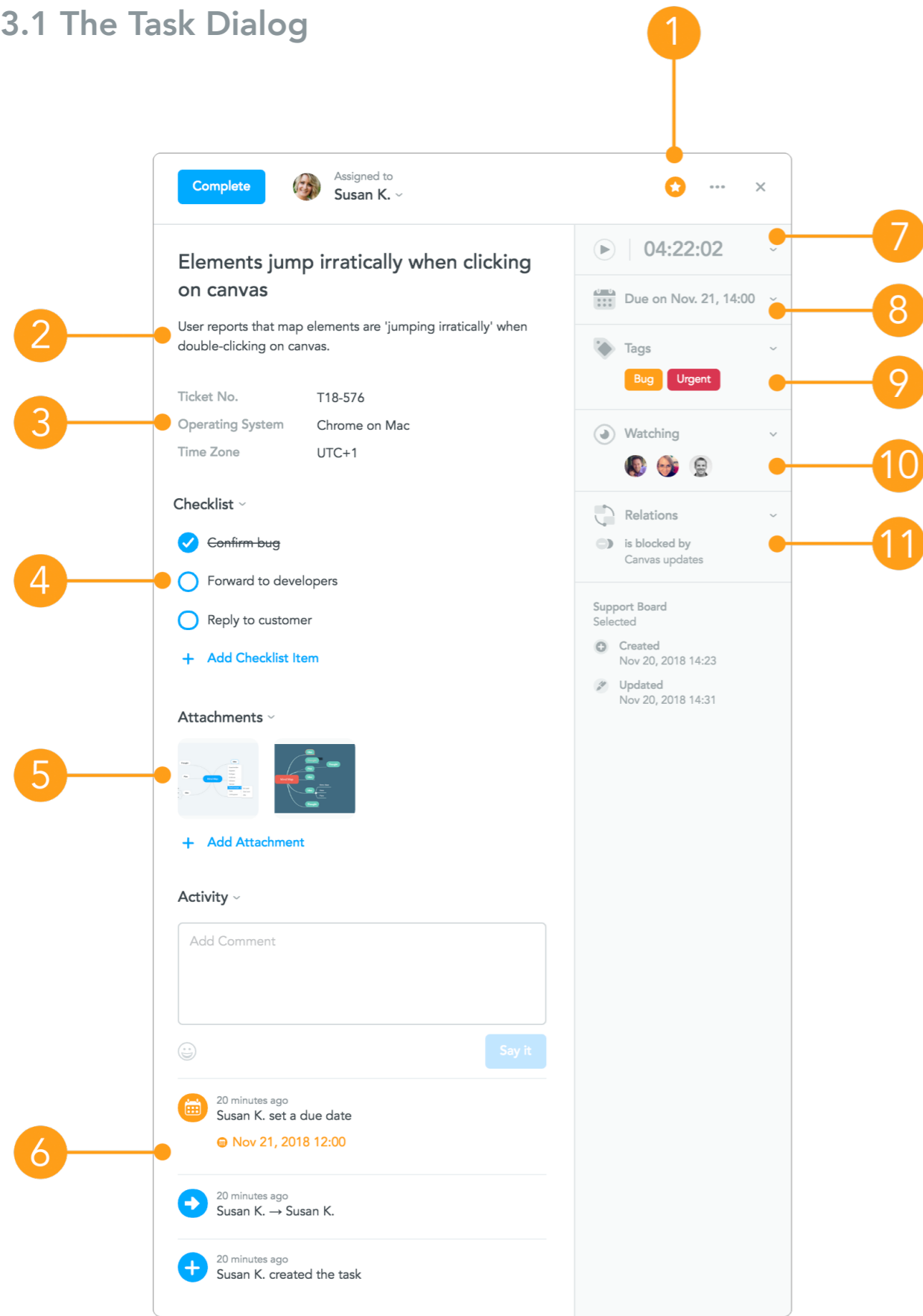
Click on the icon at the top of the members bar to open the activity stream. The stream displays all actions and changes made inside the project by you and your team members in chronological order. Click on any action to quickly open the task it belongs to and get more information.



Filters

Switch to project filters by clicking on the filter icon at the top of the activity stream. Filter tasks by status (open vs. completed), tags, due date, assignee, followers (aka watchers) or keyword.

3.1 The Task Dialog



Clicking on a task tile opens the task dialog, which contains all the information related to the task.

1. FOCUS

Click on the star button to add tasks to your FOCUS. Those tasks will show up separately on your dashboard.

2. Description

Add a detailed description with Markdown formatting to your task.

3. Custom Fields

Business users can define custom fields for each of their projects, which are then shown below the description of their tasks.

4. Checklists

Split bigger tasks into multiple checklist items and check them off as you go along. In the project settings, you can pre-define checklists, which you can then quickly load into tasks to use again and again.

5. Attachments

Quickly attach reference files, mock-ups or mind maps to your tasks. Upload from your local hard drive or directly from your connected Dropbox, MindMeister, Box or Google Drive account.

6. Activity Feed

See the entire change history of your tasks, add comments and mention other team members.

7. Time Tracking

Track time inside MeisterTask and easily edit time slips. You can also use our Harvest integration if you already have an account there!

8. Due Date & Time

Add a due date and due time to your tasks. Get notified when tasks become due.

9. Tags

Add one or multiple tags to your tasks for easy grouping and filtering.

10. Watchers

Add Watchers to tasks to ensure all stakeholders are kept in the loop about task updates. Watchers receive automatic notifications when comments are added to the task or changes are made.

11. Relations

Mark tasks as related, blocked or blocking. Get notified when blockages are removed.

4 Automations

Automations help your team work more consistently and efficiently by automating steps in your workflow.

You can define one or multiple automations for each section in your project boards, and you can choose whether to run the action only for new tasks (that is, tasks that are either created or moved to that section) or whether to also apply it to preexisting tasks in that section.

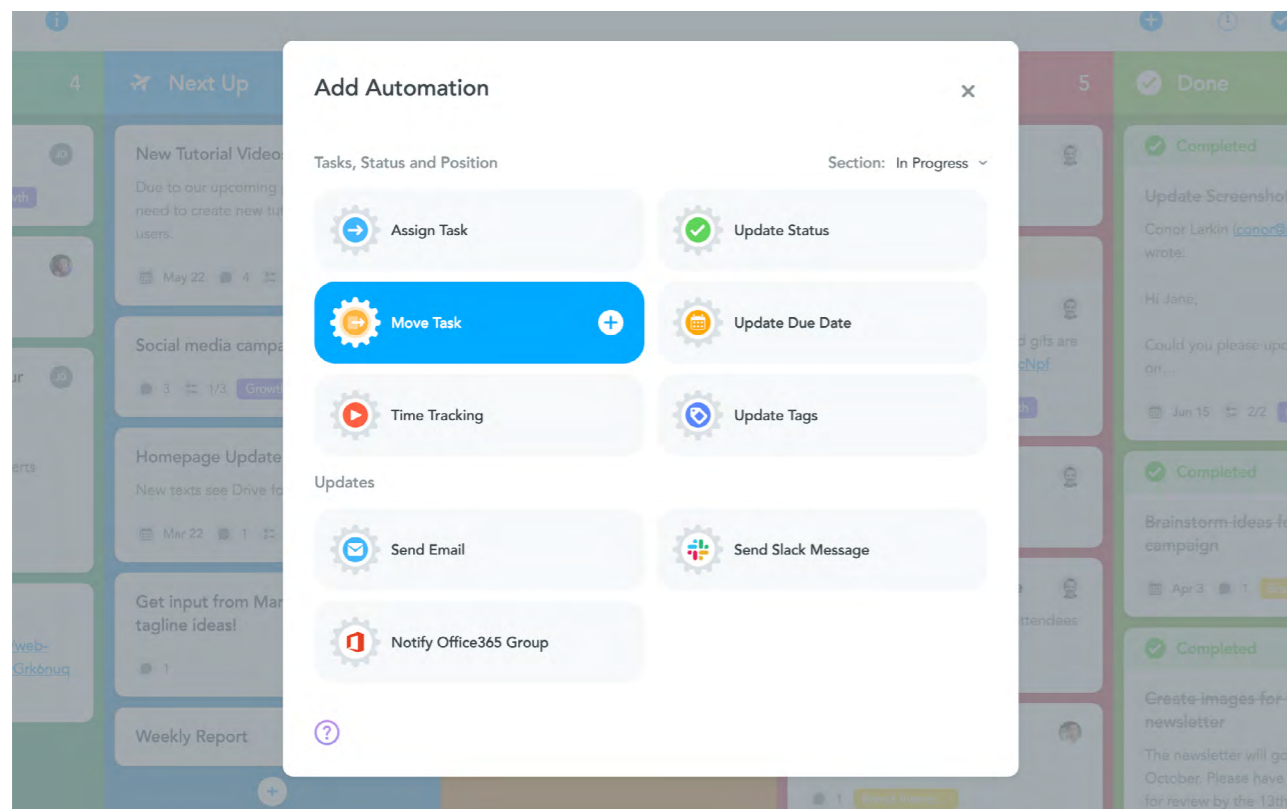
How to set up automations:

Step 1: Click the (i) button in the top bar of your project and select Project Properties.

Step 2: Switch to the Automations tab and select “Add Automation”.

Step 3: Select the automation of your choice.

Step 4: Select a section and specify the automation. Confirm with Done.

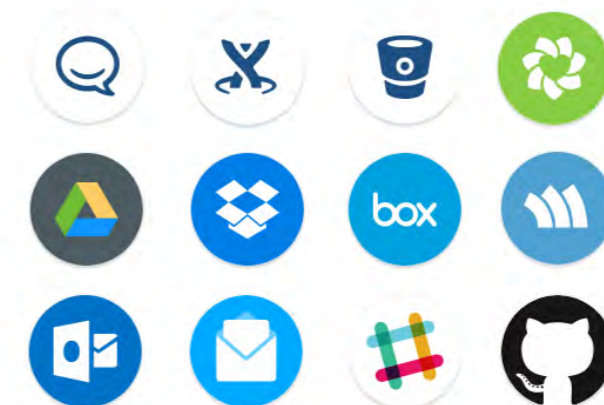


5 Integrations

MeisterTask integrates with the tools your team already uses and loves. For instance, you can send issues from GitHub straight into your sprint board, or help your support team work more efficiently by connecting their project board with Zendesk. Most integrations can be enabled via the Project Properties.

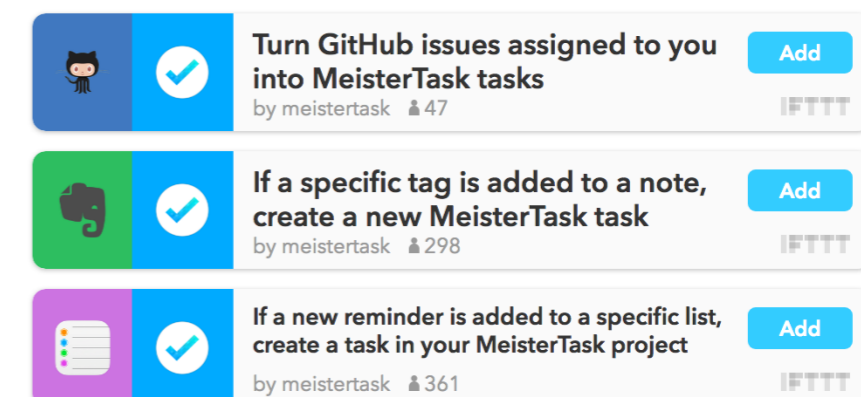
5.1 Native Integrations

MeisterTask integrates with Slack, GitHub, Zendesk, and many other tools. For a complete and up-to-date list, please visit our integrations page at www.meistertask.com/integrations.



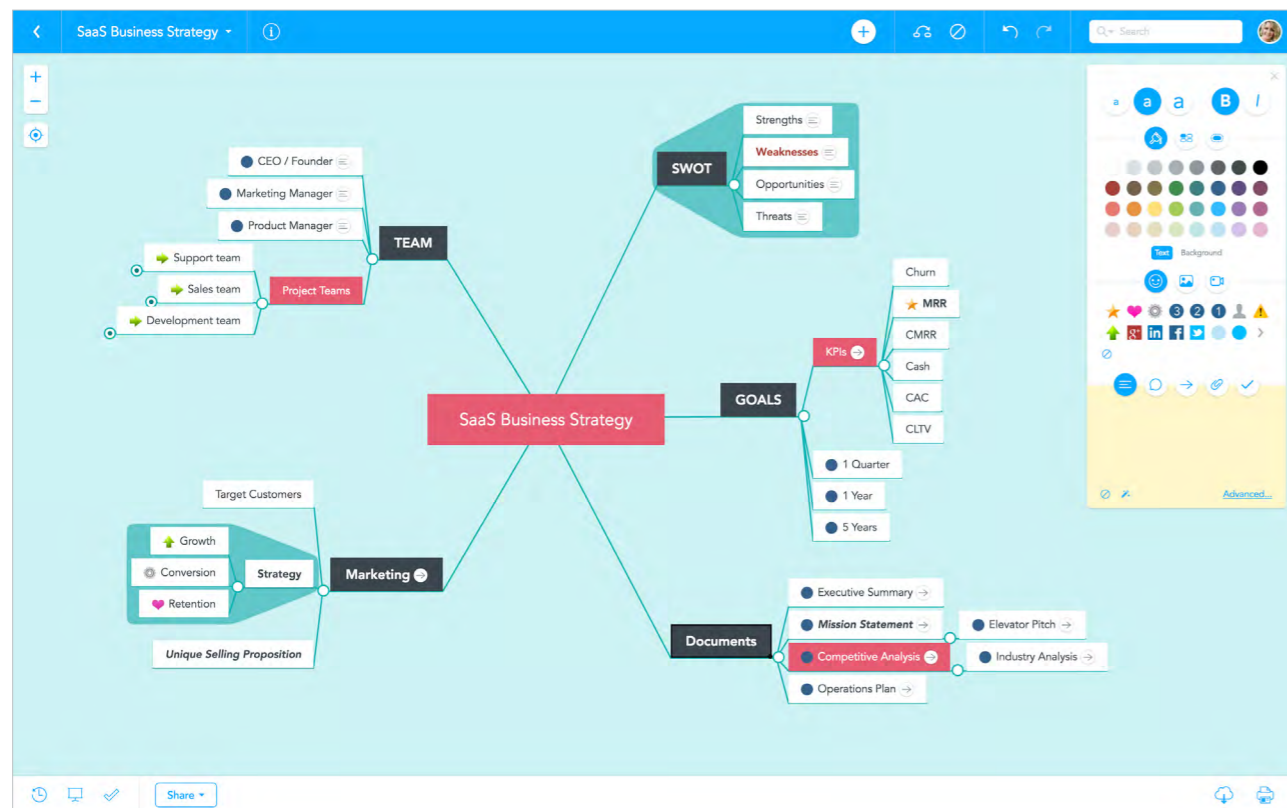
5.2 IFTTT and Zapier

IFTTT (If This Then That) and Zapier are platforms that help you connect MeisterTask with even more of your favorite apps and platforms. Signing up for either service is free, and you can create new automations in a matter of seconds.



5.3 The MindMeister Integration

MeisterTask perfectly integrates with our online mind mapping tool [MindMeister](#). This means that you can turn your brainstorm into project boards, and your ideas into tasks, in a matter of seconds. It's a great way to ensure that none of your brilliant ideas fall through the cracks.



Start by planning your project in a MindMeister mind map. Each topic you create can potentially be turned into a task. When you're done, open the MeisterTask footer. Connect the mind map with an existing project in MeisterTask, or simply create a new one directly from the map. Drag & drop topics onto a user's avatar to assign tasks to them. Tasks are automatically exported with the topics' notes and links.

By turning your ideas into tasks, you ensure that they aren't forgotten in a random meeting or brainstorming map. Instead, they immediately become part of your team's workflow, ready to be dealt with.

6. Statistics & Reports

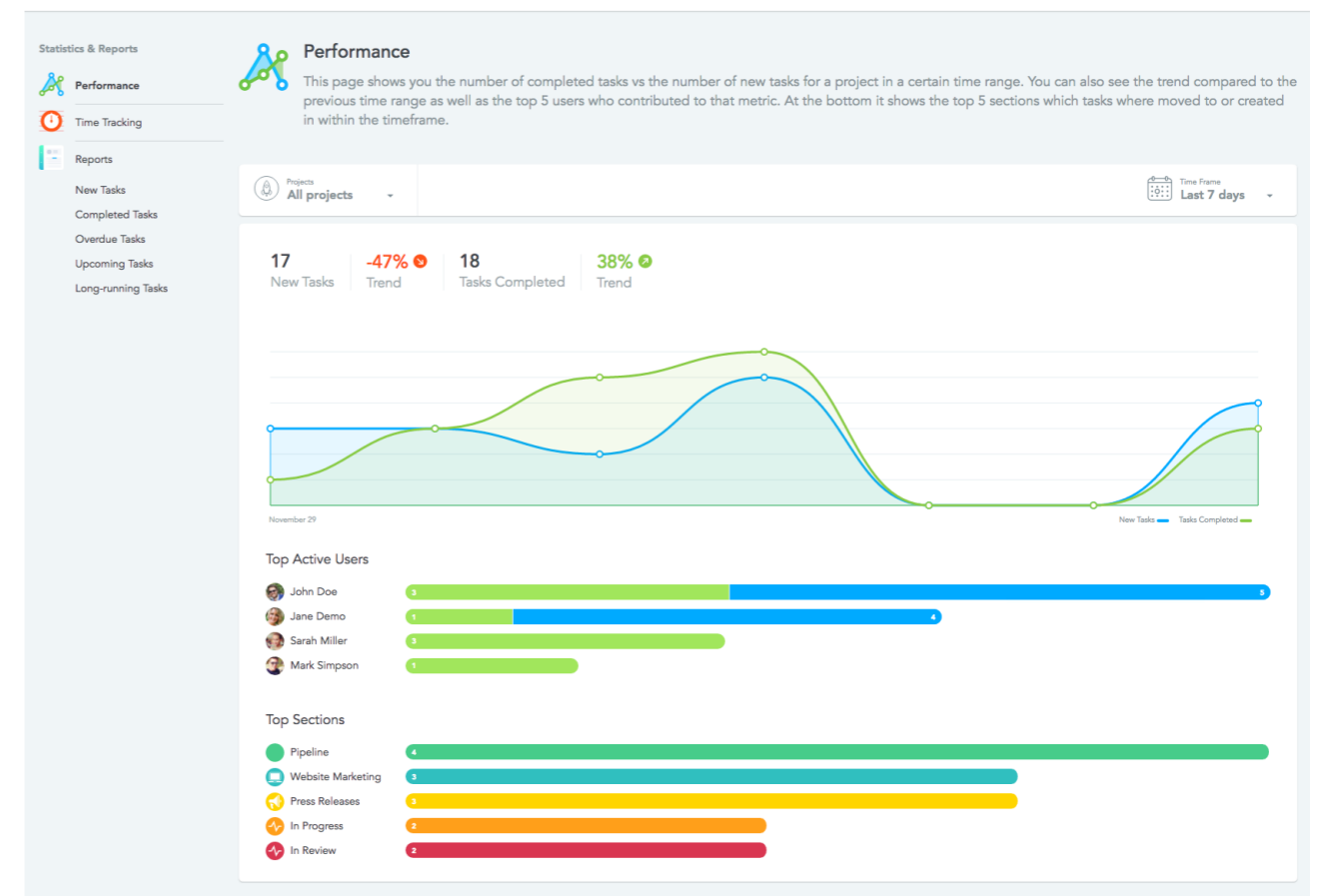
The statistics and reports area is where you can get insights into how productive your team is, which tasks are taking the longest, how much time employees are spending on tasks, and a lot more.

You can access the statistics and reports area via the account menu, which opens when you click on your user avatar.

Statistics and reports is divided into three areas: Performance, Time Tracking, and Reports.

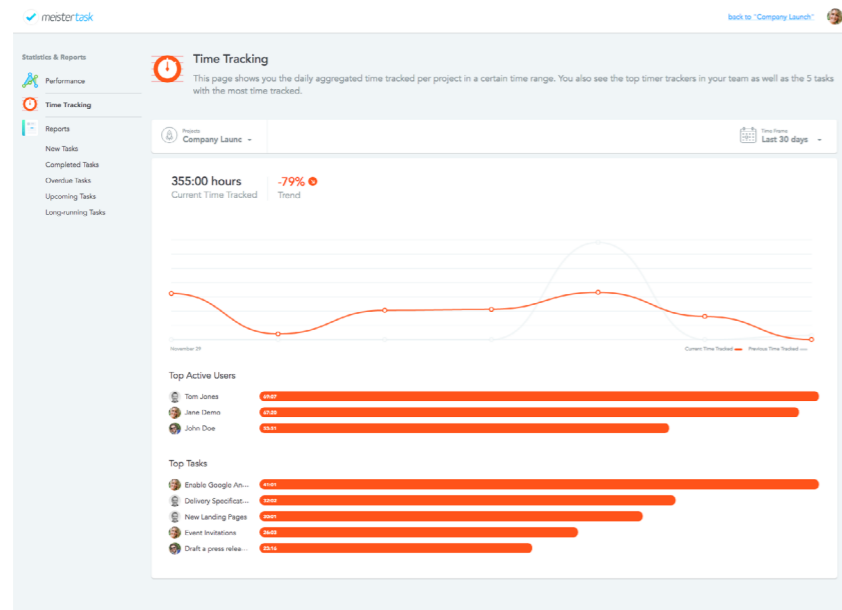
6.1 Performance

The performance area shows the number of completed tasks vs the number of new tasks for a project in a certain time range. You can also see the trend compared to the previous time range at a glance.



6.2 Time Tracking

The time tracking area shows the daily aggregated time tracked per project in a certain time range. You also see the top time trackers in your team as well as the 5 tasks with the most time tracked.



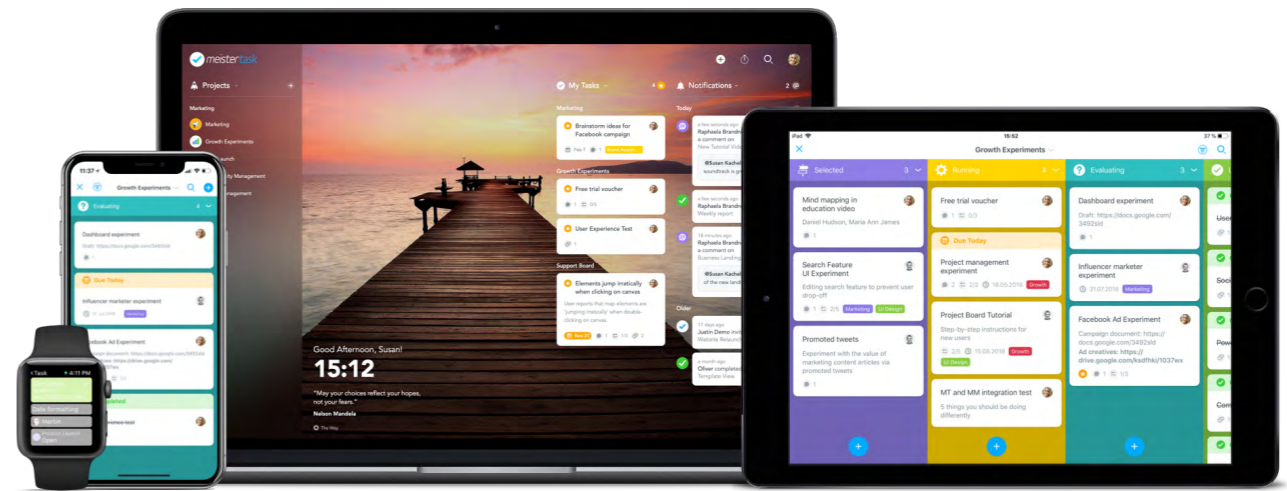
6.3 Reports

In this area you can view and export individual reports about new, completed, overdue, upcoming or long-running tasks. In each report you can either show tasks of all users and/or all projects, or narrow the selection down to a specific assignee/project.

Name	Created	Assigned to
Upload Promo Video	Apr 06 2015	Jane Dennis
Create Google display ad	Apr 06 2015	Mark Simpson
Homepage Video	Apr 06 2015	Sarah Miller
Enable Google Analytics	Apr 06 2015	Jane Dennis
Select Agency	Apr 06 2015	Tom Jones
Submit to PR Outlets	Apr 06 2015	Mark Simpson
Event Invitations	Apr 08 2015	Jane Dennis
Catering & Beverages	Apr 09 2015	John Appleseed
DJs & Bands	Apr 09 2015	John Doe
HTML5 Demo Animations	Apr 16 2015	Jane Dennis
Responsive Design	Apr 16 2015	Mark Simpson
VoiceOver Artists	Apr 16 2015	John Doe
Compile final build	Apr 16 2015	Tom Jones
Delivery Specifications	Apr 16 2015	Tom Jones
Event Decorations	Nov 25 2016	John Doe
New Landing Pages	Nov 25 2016	John Doe
Create Demo Video	Nov 25 2016	Tom Jones
Set up Wordpress blog	Nov 29 2016	Tom Jones

7. Apps

MeisterTask is a web-based task manager and as such runs in any standard web-browser. Additionally, MeisterTask offers native wrappers for Mac and Windows, which house the web app. Want to stay on top of your to-dos while you're on the go? No problem with MeisterTask's native mobile apps for iPhone, iPad, Apple Watch and Android devices. These apps come with offline functionality, which means you can even access your projects when you're not connected to the internet.





www.meistertask.com

Try it now!