



meistertask

user guide

About MeisterTask



MeisterTask is an intuitive task management tool that lets you and your team collaborate more efficiently, helps you visualize the workload, and brings your tasks into focus.



As an online tool, MeisterTask runs inside your web browser, so you don't need to download, install or update anything, ever. With its free mobile app for iPhone and iPad you'll stay on top of your tasks even on the go.



MeisterTask is an amazing tool for freelancers, private individuals and even students, but its true potential lies in its powerful collaborative features which are perfect for the project management of small teams. On pages 8-14 you will find example projects for typical use cases.

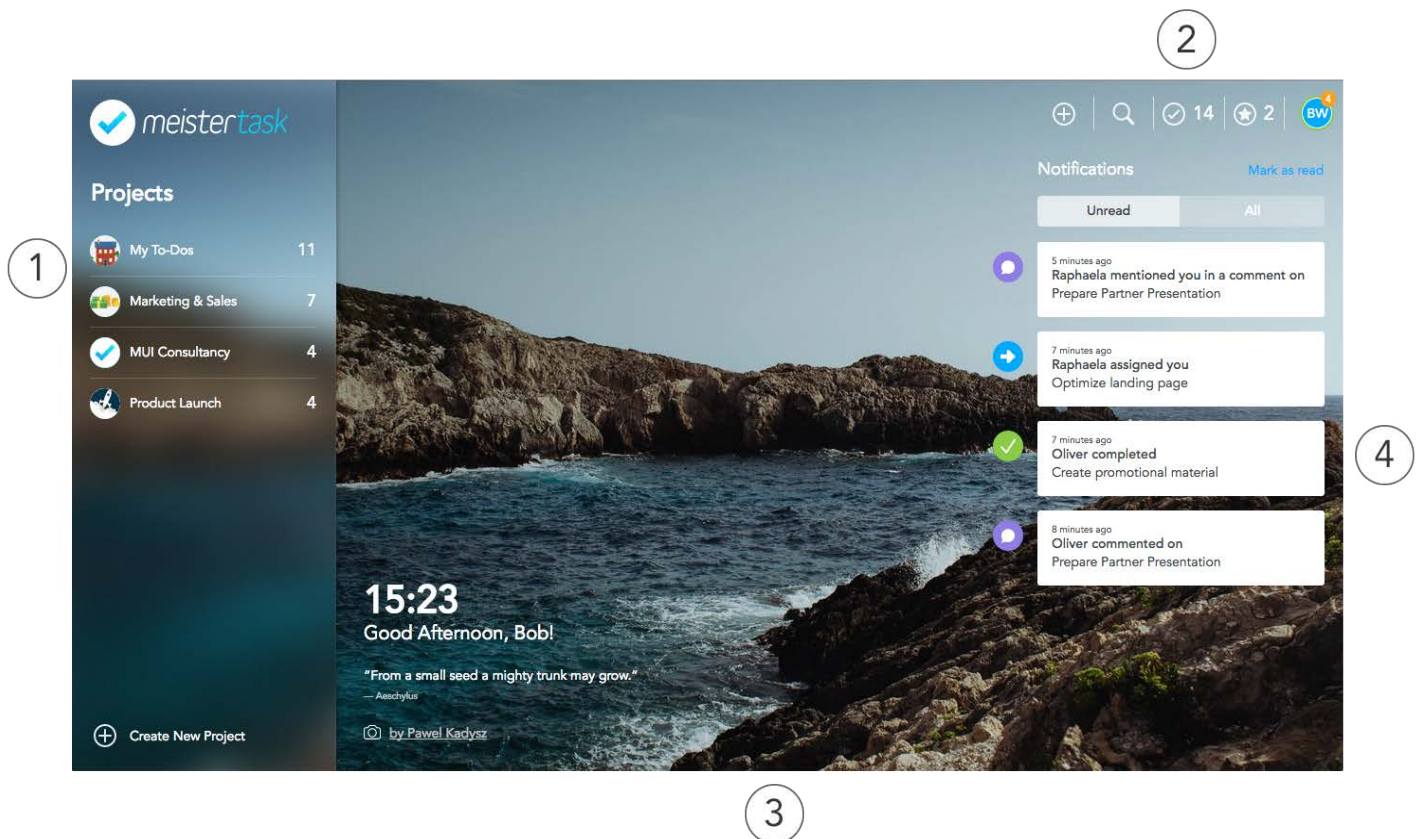
In This Guide

1. The Tool	4
1.1 The Dashboard	4
1.2 Projects	5
1.3 The Task Detail Dialog	6
2. Project Workflow	7
2.1 Static Boards	7
2.2 Flowing Boards	7
3. Use Cases	8
Business	8
3.1 Software Development	8
3.2 Marketing	9
3.3 Sales	10
3.4 Event Planning & Management	11
3.5 Social Media Agency	12
Education	13
3.6 Semester Planning	13
3.7 Creating a Student Newspaper	14
4. The MindMeister Integration	15

1. The Tool

In MeisterTask, users switch between two main views: Firstly, the **dashboard**, which offers a personalized overview of all your projects, notifications and widgets. This view is unique to every user. Secondly, the **projects** themselves, which are subdivided by sections and display all active tasks related to the respective projects.

1.1 The Dashboard



1. Project List

By default, this list displays all your active projects, ordered by the number of tasks you own in each one.

2. Widgets

The **My Tasks** widget displays *all* your active tasks from all projects, while the **Focus** widget provides a quick overview of all your tasks that are either due, overdue or were manually starred.

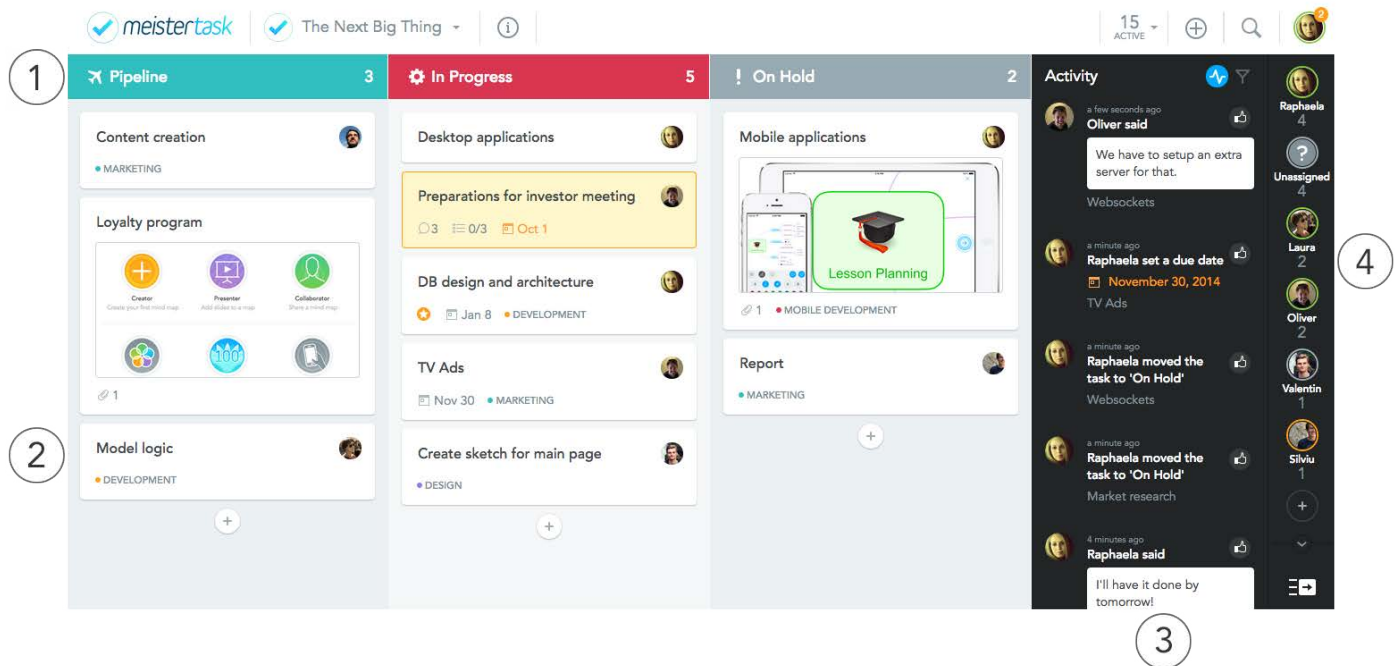
3. Background Image

Manually select a background image that reflects your mood, or let us display a random new one every day.

4. 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*.

1.2 Projects



1. 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.

2. Tasks

All tasks related to a project are displayed in the form of tiles that can be moved freely from section to section.

3. Activity Stream

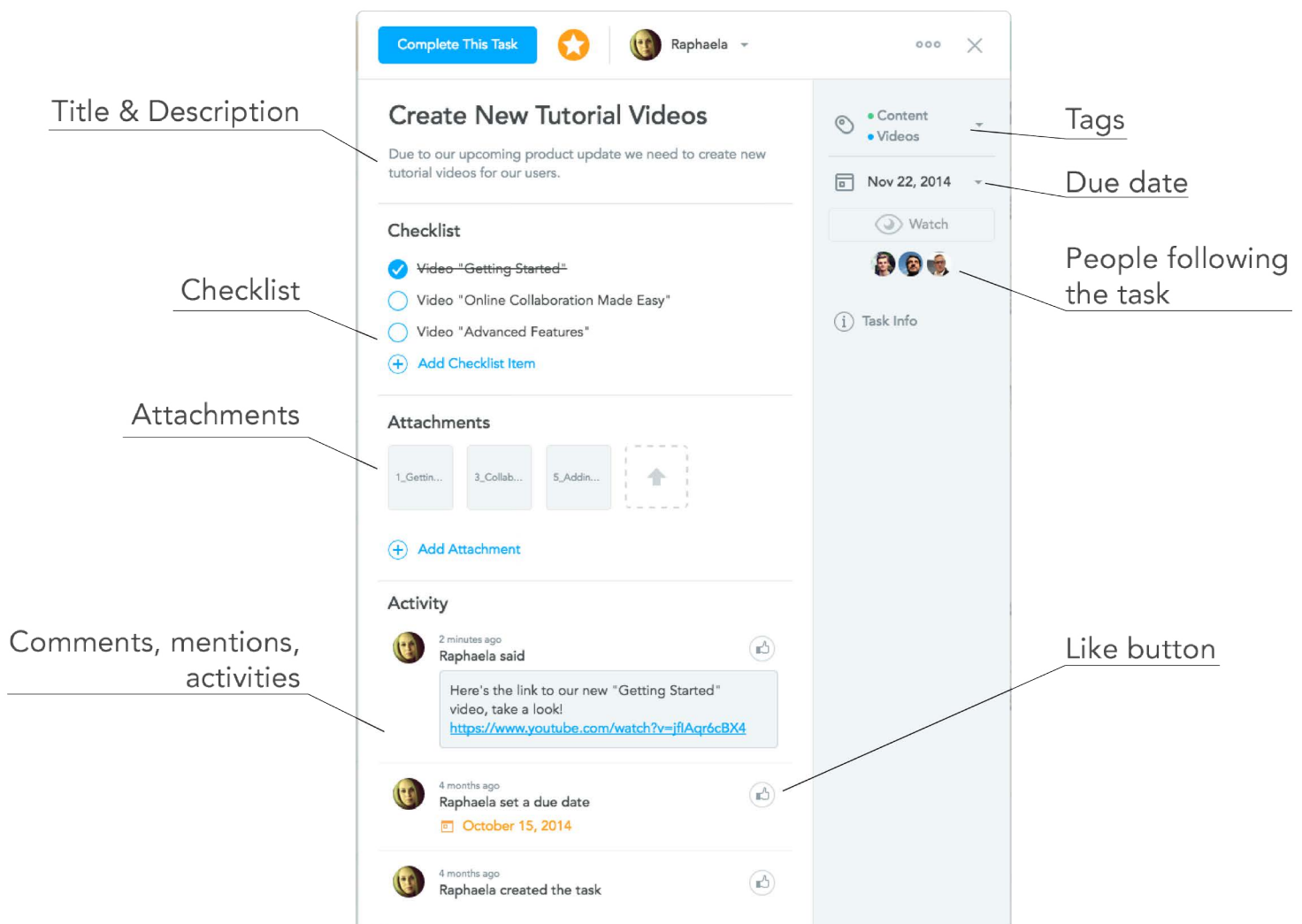
The Activity Stream displays all actions and changes made inside the project by you and your team members.

4. Members Bar

The Members Bar shows the avatars of all team members invited to the project along with the number of active tasks they own in it.

1.3 The Task Detail Dialog

Clicking on a task tile opens the Task Detail Dialog which contains all the information related to the task.



Checklists

Split bigger tasks into multiple checklist items and check them off as you go along. Pre-defined checklists also help you save time and work more consistently.

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 or Google Drive account.

Activity feed

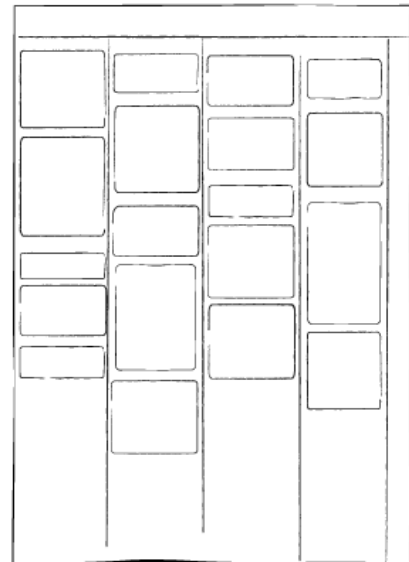
See the entire change history of your tasks, add comments and mention other team members to ask for their input. Use the Like button to show your approval of comments & actions.

2. Project Workflow

There are two distinct ways to organize your project boards in MeisterTask. We call them **Static Boards** and **Flowing Boards**.

2.1 Static Boards

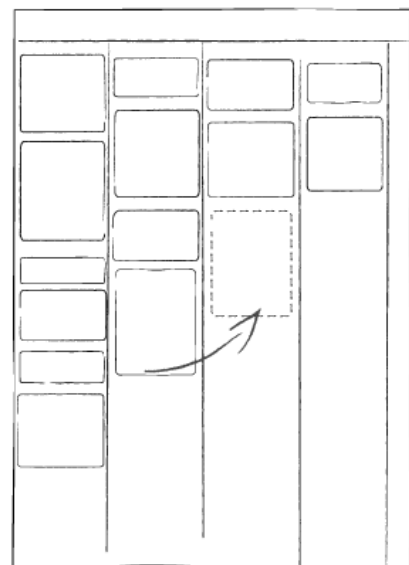
In Static Boards, your tasks are created, managed and completed all within the same section. Tasks may be reassigned to different team members or moved up or down within a section, but they generally don't move from one section to another. Static Boards are extremely flexible and **don't** require that you have a fixed workflow in place that's applicable for all your tasks.



2.2 Flowing Boards

The principle of Flowing Boards is based on the famous Kanban method, with tasks starting out in the left-most section and subsequently moving to the right until they eventually get completed.

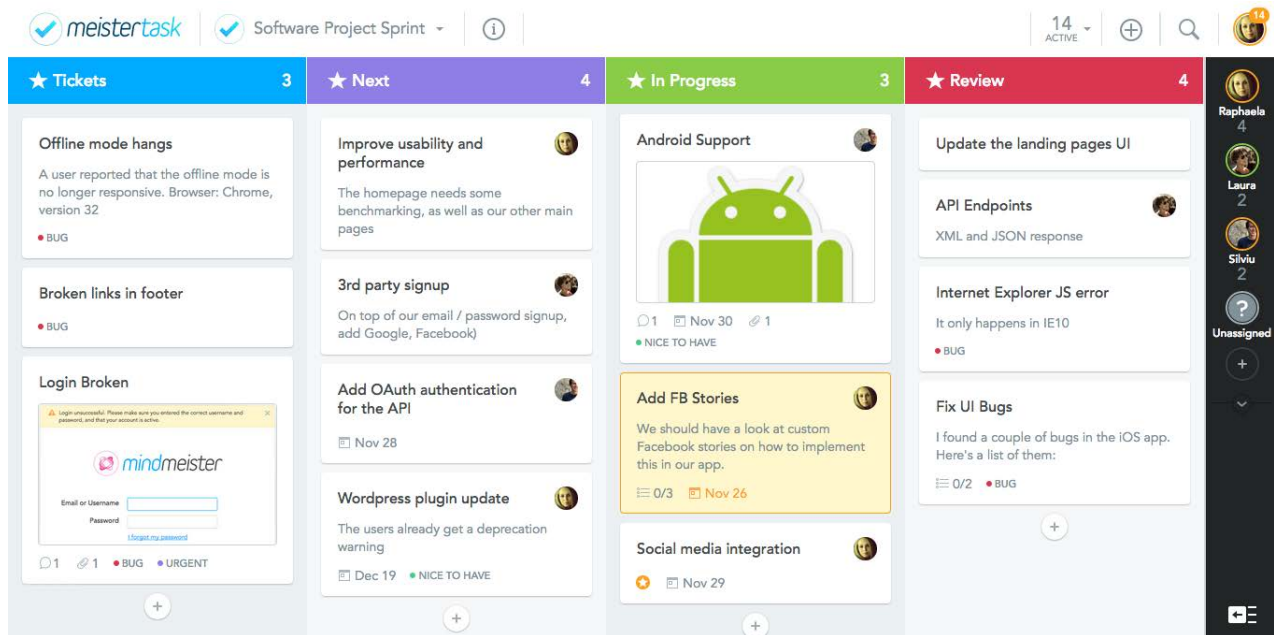
Flowing Boards are great for teams with fixed processes that predefine the different stages a task has to go through, but they are also used to represent simple temporal progresses such as PIPELINE > UP NEXT > IN PROGRESS > DONE.



3. Use Cases

Business

3.1 Software Development



Type: Flowing Board

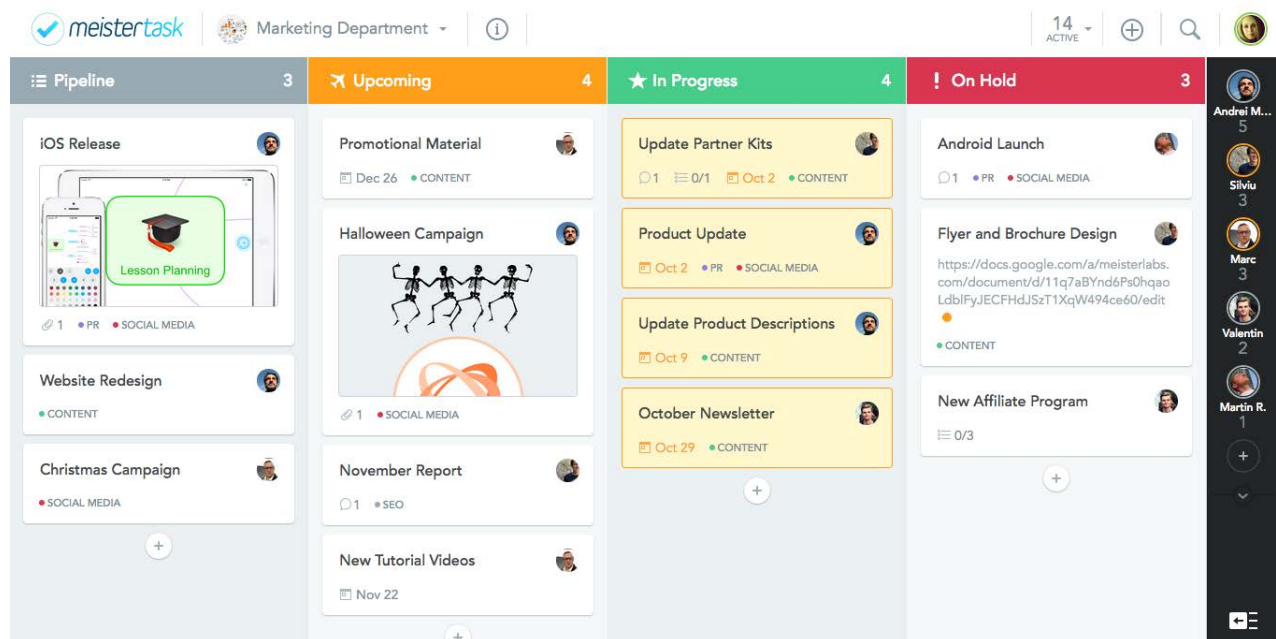
This type of project is ideal for small software development teams maintaining a tool. Through customer support tickets new tasks are added on the left, where the project manager assigns them to one of the developers. Tasks are then moved up the queue to the Next section, where they stay until a developer starts working on them. While in Review, the project manager inspects the work. Approved tasks are completed, not approved ones go back to In Progress.

Tags:

Tags are used to classify the task.

- BUG = Software bugs and errors
- NICE TO HAVE = Features of no particular importance or urgency
- URGENT = Tasks with a high priority

3.2 Marketing



Type: Flowing Board

In this project, new tasks are being added in the Pipeline section on the left and moved first into the Upcoming section, then into the In Progress section. Tasks that were already started but have to be put on hold for whatever reason are temporarily moved to the On Hold section.

Tags:

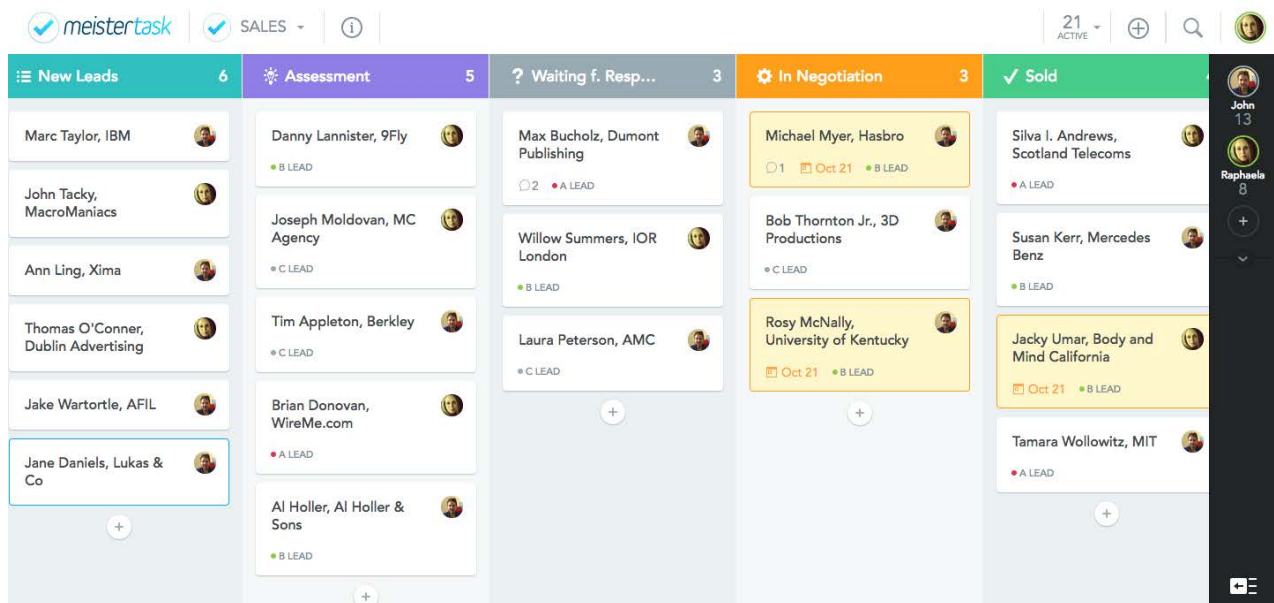
Tags are used to indicate which type of marketing the task is related to.

- CONTENT = Content marketing (blog, website, etc.)
- ADS = Print adverts, banners
- SEO = Search engine optimization tasks
- PR = Public relations (press releases, communications with journalists)
- SOCIAL MEDIA = Social media campaigns & posts



Tip: This type of project is great for small in-house marketing teams that handle many different types of tasks.

3.3 Sales



Type: Flowing Board

In this project, each task represents a sales lead. The task tiles are inserted in the New Leads section on the left. The other four sections (In Assessment, Waiting for Response, In Negotiation, Sold) correlate with the different stages of the sales funnel. Tasks move to the Sold section once the contract is signed, and stay there until the whole sale is completed.

Tags:

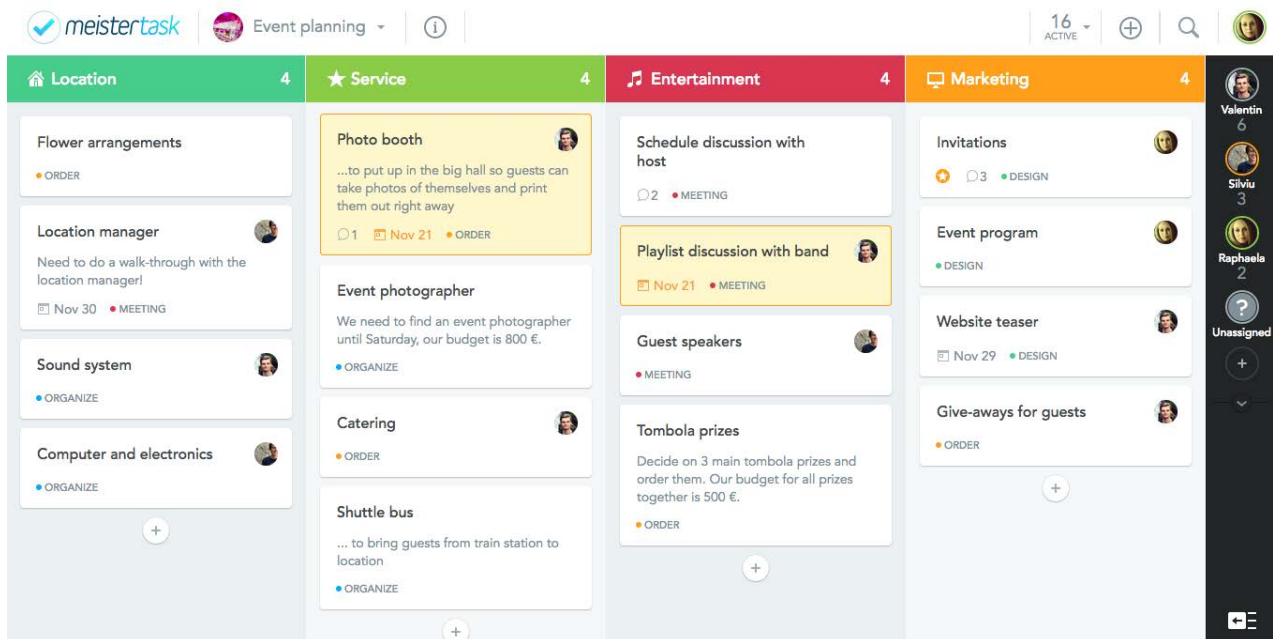
Tags are used to indicate the lead ranking.

- A LEAD = Hot lead (highest ranking)
- B LEAD = Warm lead
- C LEAD = Cold lead



Tip: This type of project is great for small sales teams or individual sales people.

3.4 Event Planning & Management



Type: Static Board

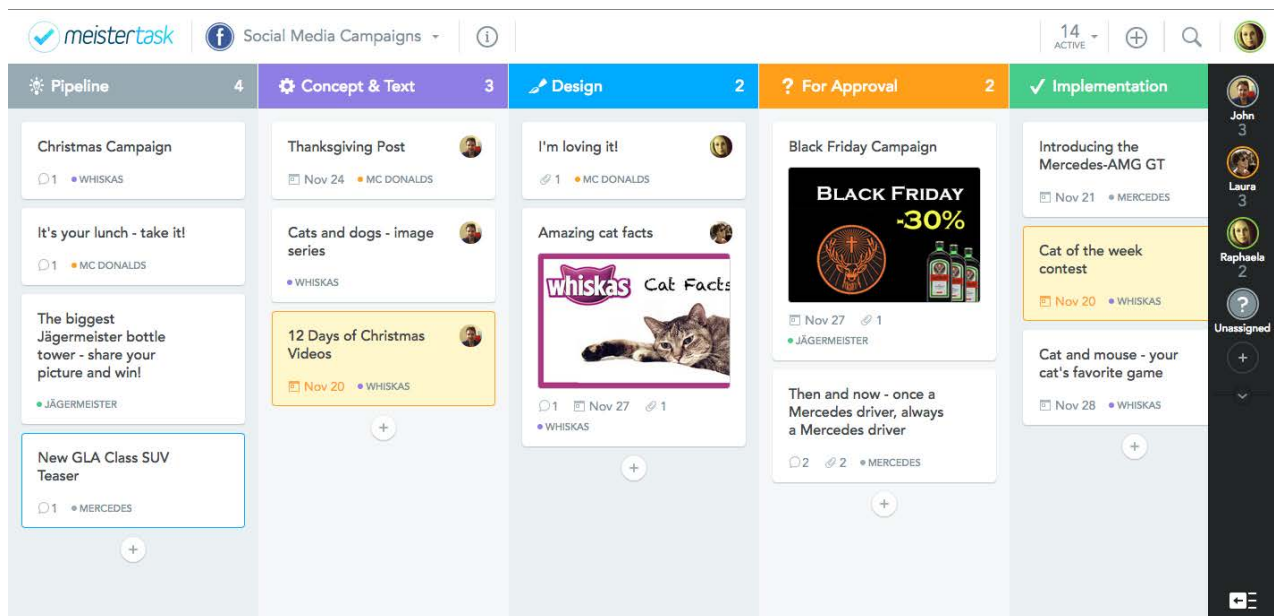
Whether it's a small wedding or a grand award ceremony, a good overview of your tasks is extremely important when it comes to organizing an event. Keeping the number of sections low will help you see at a glance what's happening in your project. Tasks are generally not moved around between sections.

Tags:

Tags are used to indicate the type of task.

- ORGANIZE = Includes research, communication and making appointments
- ORDER = Includes all types of purchases
- MEETING = Meetings with both team members and external entities
- DESIGN = All (graphic) design related tasks

3.5 Social Media Agency



Type: Flowing Board

This project is designed for a marketing agency that creates social media postings and campaigns for various clients. During strategy meetings new ideas are developed and added as tasks in the Pipeline. From there the tasks are dragged to the Concept & Text section, where they stay until a Community Manager completes this stage and moves them to the Design section, and so on.

Tags:

Tags are used to indicate which client/product a task is related to.

- MERCEDES = Social media campaigns and posts for Mercedes Benz
- WHISKAS = Social media campaigns and posts for Whiskas
- MCDONALDS = Social media campaigns and posts for McDonalds
- JÄGERMEISTER = Social media campaigns and posts for Jägermeister



Tip: This type of Flowing Board is great for all kinds of agencies whose team members have very fixed roles and whose tasks always go through the same processes.

3.6 Semester Planning

The screenshot shows the MeisterTask interface for a semester planning board. At the top, the header includes the MeisterTask logo, the semester "Winter Semester 2014/15", and a user profile icon. The board is organized into four columns, each representing a subject or course:

- Seminar 1 & 2 (5 tasks):**
 - Summarize Chapters 1-3 in Textbook (Nov 20, Homework)
 - Heart of Darkness by Joseph Conrad (Nov 21, Reading)
 - Transcribe Interviews (Research Paper)
 - Evaluate Research Results (Research Paper)
 - Final Seminar 2 (Mar 3, Exam Prep)
- Pragmatics (3 tasks):**
 - Midterm Pragmatics (Dec 17, Exam Prep)
 - Final Pragmatics (Jan 30, Exam Prep)
 - Revise Material from Unit 4 (Nov 28, Homework)
- Philosophy 101 (5 tasks):**
 - Edit Philosophy Paper (Nov 20, Research Paper)
 - Print & Bind Philosophy Paper (Feb 2, Research Paper)
 - The Dialogues of Plato by Plato (Reading)
 - Aquinas by Fr. Frederick Copleston, SJ (Reading)
 - Faith, Hope, Love by Josef Pieper (Reading)
- Cultural Studies (3 tasks):**
 - Write Analysis of Cultural Artifact (Nov 20, Homework)
 - Adorno, Theodore and Max Horkheimer. The Dialectic of Enlightenment (Reading)
 - Multiple Choice (Jan 30, Exam Prep)

Each task card also features a plus icon at the bottom for adding more details or sub-tasks.

Type: Static Board

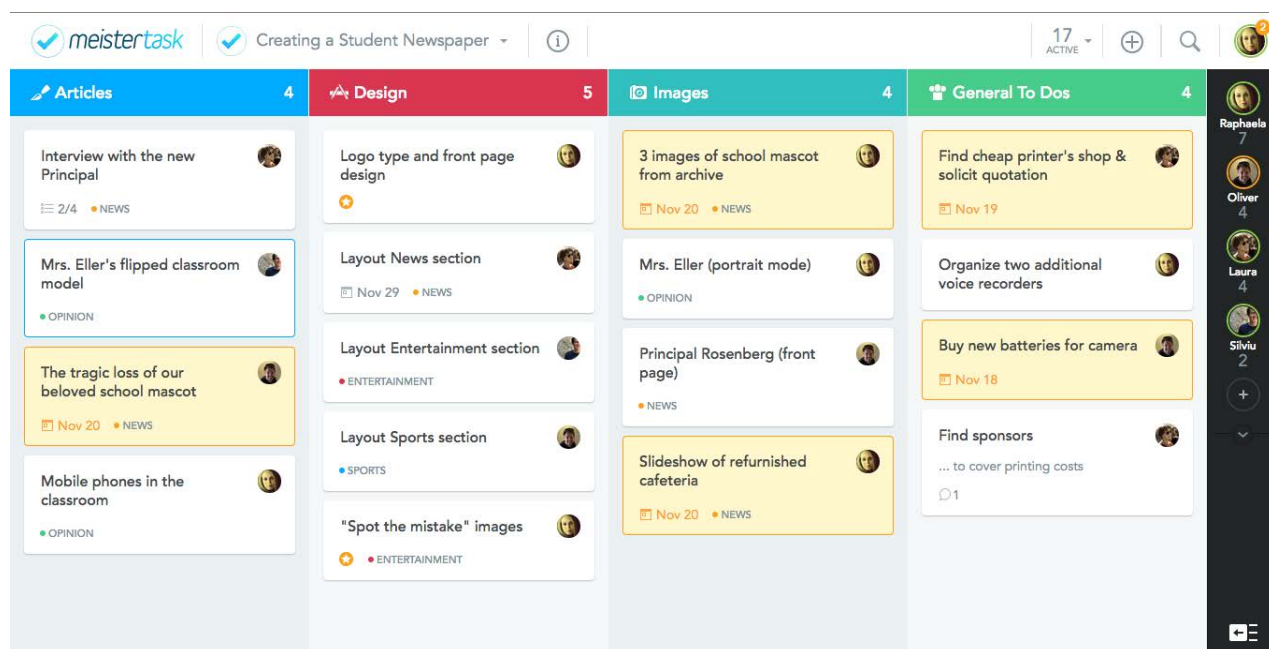
Students can use a simple project board like this to stay on top of their to-dos for school and university. In this case, each subject was assigned a section and tags are used to indicate the type of task. Alternatively, students could also create sections for different types of tasks, labeled Homework, Reading, Exam Prep and Research Papers, and use the tags to indicate the subject.

Tags:

Tags are used to indicate the type of task.

- HOMEWORK = Homework assignments
- READING = Books from the mandatory reading list
- RESEARCH PAPER = Tasks related to research papers (interviews, research, etc.)
- EXAM PREP = Necessary preparations for exams (revising, summarizing, etc.)

3.7 Creating a Student Newspaper



Type: Static Board

Virtual collaboration is one of the most important skills in the modern job market, which is why schools are emphasizing it today more than ever. Simple projects like this one can be used in various educational contexts, from creating a student newspaper (ongoing or recurring project) to completing a collaborative research project (nonrecurring).

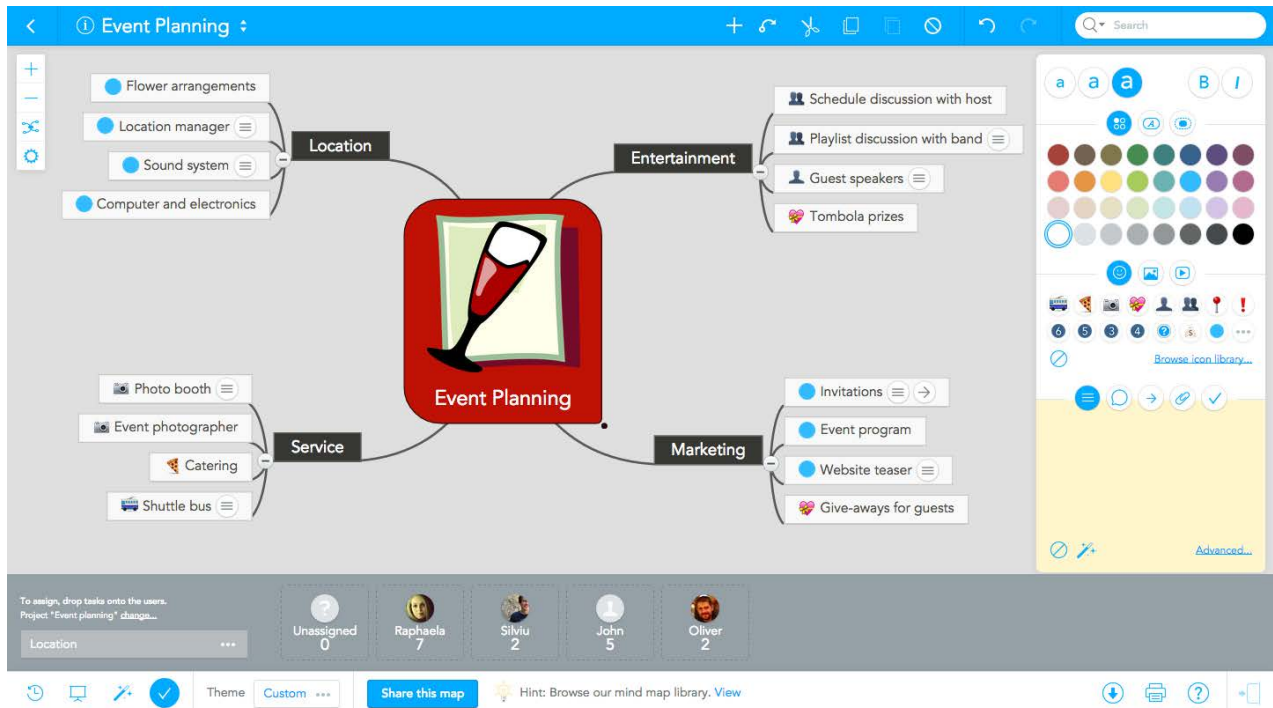
Tags:

Tags are used to indicate which section in the newspaper a task is related to.

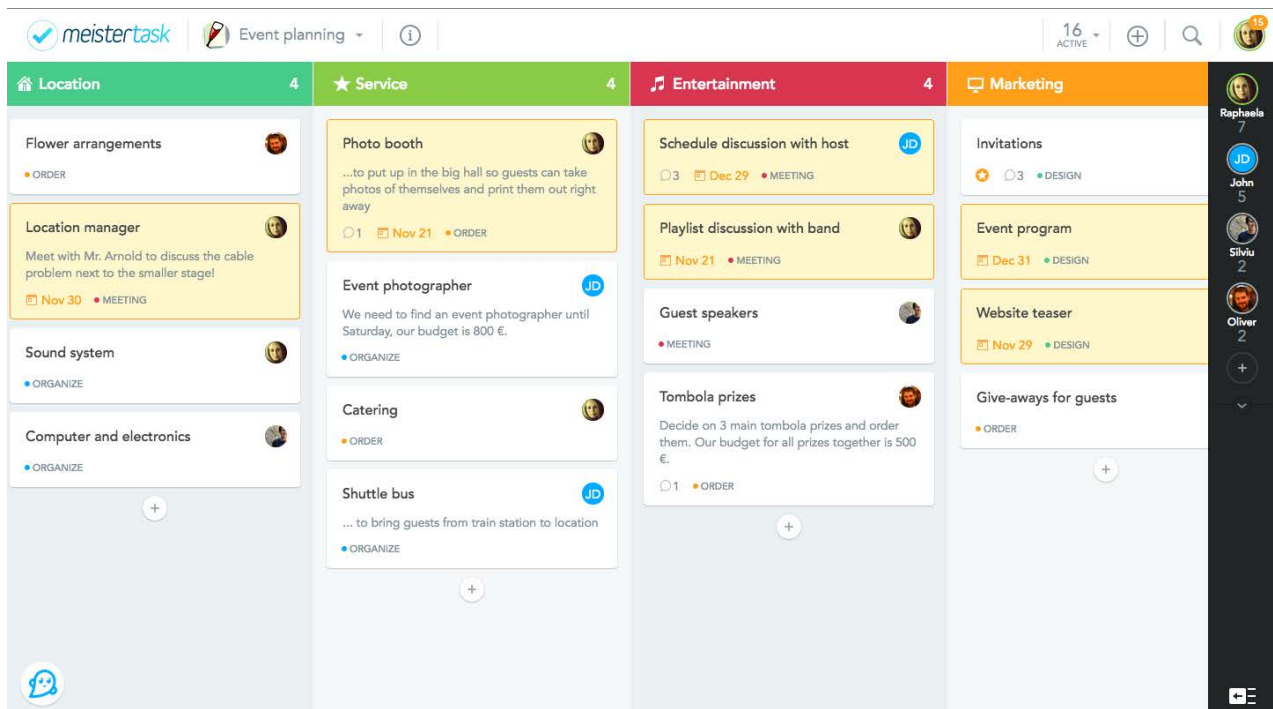
- OPINION = Opinion section
- NEWS = News section
- ENTERTAINMENT = Entertainment section
- SPORTS = Sports section

4 The MindMeister Integration

MeisterTask perfectly integrates with the online mind mapping tool MindMeister. Together, the tool suite offers a seamless visual workflow from first idea to finished project.



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.





www.meistertask.com

Try it now!