task_guide

COMPASS Task Management Guide

Overview

The COMPASS Task Management system provides a robust platform for organizing, tracking, and optimizing your tasks. This guide will help you understand the features and capabilities of the system and how to leverage the AI-powered assistance to maximize your productivity.

Task Properties

Tasks in COMPASS have the following properties:

Basic Information

- **Title**: A concise description of the task
- **Description**: Detailed explanation of what needs to be done
- **Status**: Current state of the task (To Do, In Progress, Completed, Cancelled, Blocked, Under Review, Deferred)
- **Priority**: Importance level (Low, Medium, High, Urgent)
- **Project**: The project this task belongs to

Scheduling

- **Start Date**: When work on the task should begin
- **Duration**: Estimated time required to complete the task
- **Due Date**: Deadline for completing the task
- **Recurrence**: For repeating tasks (None, Daily, Weekly, Monthly, Yearly, Custom)
- **Recurrence End Date**: When a recurring task series should end

People

- **Creator**: Person who created the task
- **Assignee**: Person responsible for completing the task
- **Reviewer**: Person who will review the completed task

Organization

- **Category**: The type or classification of the task
- **Parent Task**: For hierarchical task organization
- **Dependencies**: Other tasks that must be completed before this one can start

- **Tags**: Keywords for easier searching and filtering

Progress Tracking

- **Estimated Hours**: Predicted time to complete

- **Actual Hours**: Time actually spent on the task

- **Complexity Score**: How difficult the task is (AI-calculated)

- **Health Score**: Status indicator based on progress, blockers, and timeliness

- **Blockers**: Issues preventing progress

- **Progress Metrics**: Custom metrics for measuring advancement

Working with Tasks

Creating a Task

To create a new task, provide the following essential information:

- Title (required)

- Description (required)

- Project (required)

- Start date (required)

- Priority (defaults to Medium)

- Status (defaults to To Do)

Additional fields can be filled in as needed.

Task Status Workflow

Tasks typically progress through the following statuses:

1. **To Do**: Task is created but work hasn't started

2. **In Progress**: Work has begun on the task

3. **Under Review**: Task is completed and awaiting review

4. **Completed**: Task is finished and approved

5. **Cancelled**: Task is no longer needed

6. **Blocked**: Progress is blocked by an external factor

7. **Deferred**: Task is postponed to a later time

Managing Task Dependencies

Dependencies ensure tasks are completed in the correct order:

1. Add dependencies when creating or editing a task

2. A task cannot be marked complete until all its dependencies are completed

3. The system will warn you if you attempt to create circular dependencies

Recurring Tasks

For tasks that repeat regularly:

1. Set the recurrence pattern (Daily, Weekly, Monthly, Yearly, or Custom)

2. For custom recurrence, specify the days of the week

3. Optionally set an end date for the recurrence

4. Each occurrence can be modified independently

AI-Powered Task Assistance

COMPASS uses AI to enhance your task management experience:

Task Analysis

- **Complexity Assessment**: AI evaluates task difficulty based on description and context

- **Time Estimation**: Get AI-suggested time estimates based on similar tasks

- **Health Monitoring**: Automatic calculation of task health based on progress, blockers, and timeline

Task Optimization

- **Dependency Analysis**: Identify potential bottlenecks in your workflow

- **Task Planning**: Get AI recommendations for task scheduling and prioritization

- **Risk Assessment**: Proactive identification of tasks that might face issues

Content Assistance

- **Task Description Enhancement**: Get AI suggestions to improve task descriptions

- **Progress Tracking**: AI-assisted logging of task progress

- **Blocker Resolution**: Get AI recommendations for resolving task blockers

Using RAG for Task Context

COMPASS uses Retrieval Augmented Generation (RAG) to provide contextually relevant assistance:

How RAG Works

1. Your task data is securely indexed in a vector database

2. When you ask for assistance, the system retrieves relevant task information

3. This context is combined with your query to generate highly relevant responses

Available RAG Capabilities

- **Task Retrieval**: Find specific task information quickly

- **Task Analysis**: Get insights about your tasks and workload

- **Task Summarization**: Generate concise overviews of your tasks
- **Task Planning**: Get assistance organizing and scheduling your tasks

Example Queries

- "Show me all high-priority tasks due this week"
- "What are the blockers in my current workflow?"
- "Summarize my project tasks by status"
- "Help me plan my tasks for the next sprint"
- "Which of my tasks are at risk of missing deadlines?"

Integrations

COMPASS Task Management integrates with:

Todo System

- Link tasks to smaller todo items
- Convert todos to tasks when they grow in scope
- Track both in a unified interface

Calendar

- Tasks appear on your calendar based on start and due dates
- Receive reminders for upcoming task deadlines
- Recurring tasks show up according to their recurrence pattern

Projects

- Organize tasks within project workflows
- Track project-level progress through task completion
- Analyze workload distribution across projects

Best Practices

Task Creation

- Use clear, action-oriented titles (e.g., "Implement login feature" vs "Login")
- Include acceptance criteria in the description
- Set realistic due dates and time estimates
- Use categories and tags consistently for better organization

Task Management

- Update task status regularly to reflect actual progress
- Document blockers as soon as they arise

- Break down large tasks into smaller, manageable subtasks

- Use comments to document decisions and progress

Workflow Optimization

- Review overdue tasks regularly

- Balance workload across team members

- Use the AI insights to identify process improvements

- Track historical task data to improve future estimates

Troubleshooting

Common Issues

- **Task Dependencies**: If you can't mark a task as complete, check if it has incomplete dependencies

- **Recurring Tasks**: If a recurring task isn't appearing, verify the recurrence pattern

- **Task Visibility**: If you can't see a task, check your permissions and filters

Getting Help

- Use the AI assistant for context-aware help

- Check the documentation for detailed guides

- Contact system administrators for permission-related issues