

user_guide

COMPASS Frontend User Guide

Introduction

The COMPASS frontend provides a clean, intuitive interface for managing your tasks, todos, calendar events, and more. This guide will help you navigate the interface and make the most of the system's features.

Navigation

Main Sidebar

The main sidebar provides access to all major sections of the application:

- **Dashboard:** Overview of your tasks, todos, and upcoming events
- **Tasks:** Detailed task management interface
- **Todos:** Quick daily todo management
- **Calendar:** Schedule view of tasks and events
- **Projects:** Project management and organization
- **AI Assistant:** Access to the AI assistance features
- **Settings:** User preferences and application settings

User Menu

The user menu in the top-right corner provides:

- **Profile:** View and edit your user profile
- **Preferences:** Set personal preferences
- **Theme:** Toggle between light and dark mode
- **Notifications:** Access notification settings
- **Logout:** Sign out of the system

Task Management Interface

Task List View

The task list view displays your tasks with the following features:

- **Filtering:** Filter tasks by status, priority, assignee, and more
- **Sorting:** Sort tasks by due date, priority, title, etc.

- **Grouping:** Group tasks by project, status, or assignee
- **Pagination:** Navigate through multiple pages of tasks
- **Quick Actions:** Access common actions directly from the list

Task List Columns

- **Title:** The name of the task
- **Status:** Current task status with color coding
- **Priority:** Task priority with visual indicator
- **Due Date:** Deadline with warning colors for approaching dates
- **Assignee:** Person responsible for the task
- **Project:** The project the task belongs to
- **Actions:** Quick access to common actions

Task Detail View

Click on any task to view its details:

- **Basic Info:** Title, description, status, and priority
- **Dates:** Start date, due date, and duration
- **People:** Creator, assignee, and reviewer
- **Dependencies:** Tasks that must be completed before this one
- **Attachments:** Files associated with the task
- **Comments:** Discussion related to the task
- **History:** Record of changes made to the task

Creating Tasks

To create a new task:

1. Click the "New Task" button in the task list view
2. Fill in the required fields (title, description, project, start date)
3. Set additional properties as needed (priority, assignee, due date, etc.)
4. Add any dependencies or attachments
5. Click "Create Task" to save

Editing Tasks

To edit an existing task:

1. Open the task detail view
2. Click the "Edit" button
3. Make your changes to any field

4. Click "Save Changes" to update the task

Task Status Updates

To update a task's status:

1. From the task list, use the status dropdown in the task row
2. From the task detail view, use the status dropdown at the top
3. Select the new status from the available options

Task Dependencies

To manage task dependencies:

1. Open the task detail view
2. Navigate to the "Dependencies" section
3. Click "Add Dependency" to select tasks this task depends on
4. Click "Remove" next to a dependency to remove it

Task Comments

To add comments to a task:

1. Open the task detail view
2. Scroll to the "Comments" section
3. Type your comment in the text field
4. Click "Add Comment" to post

Todo Management Interface

Todo List View

The todo list provides a simplified interface for managing daily tasks:

- **Filtering:** Filter todos by status, priority, and due date
- **Sorting:** Sort by priority, due date, or creation date
- **Grouping:** Group todos by status or tags
- **Checkboxes:** Quickly mark todos as complete
- **Drag-and-Drop:** Reorder todos to arrange by importance

Todo Details

Click on a todo to see and edit its details:

- **Title:** The main description of the todo
- **Description:** Additional notes (optional)

- **Status:** Current status (Pending, In Progress, Completed, Archived)
- **Priority:** Importance level (Low, Medium, High)
- **Due Date:** When the todo should be completed
- **Tags:** Categories or labels for organization
- **Checklist:** Sub-items within the todo

Creating Todos

To create a new todo:

1. Click the "Add Todo" button
2. Enter a title for your todo
3. Add optional details like description, due date, and priority
4. Click "Create" to add it to your list

Managing Todos

Common todo management actions:

- **Complete:** Click the checkbox next to a todo
- **Edit:** Click on the todo and modify its details
- **Delete:** Click the trash icon to remove a todo
- **Convert to Task:** Click "Convert to Task" to create a full task from a todo

Using AI Features in the Interface

AI Assistant

The AI assistant is accessible throughout the interface:

1. Click the AI icon in any view
2. Type your question or request
3. The assistant will respond with relevant information

Context-Aware AI

The AI assistant is context-aware:

- In the task view, it can answer questions about your tasks
- In the todo view, it focuses on your todos
- In the calendar view, it helps with scheduling

AI Suggestions

The system provides proactive AI suggestions:

- **Task Descriptions:** Get suggestions for improving task descriptions
- **Todo Organization:** Receive tips for organizing your todos
- **Time Management:** Get recommendations for managing your schedule

Calendar Integration

Calendar View

The calendar view shows your tasks and events:

- **Day View:** Detailed view of a single day
- **Week View:** Overview of your week
- **Month View:** Broader view of your monthly schedule
- **Agenda View:** List-based view of upcoming items

Task Display

Tasks appear on the calendar based on:

- **Start Date:** When the task begins
- **Due Date:** When the task is due
- **Duration:** The length of time allocated to the task

Recurring Tasks

Recurring tasks display with special indicators:

- **Series Icon:** Shows that the task is part of a recurring series
- **Occurrence Number:** Identifies which occurrence in the series
- **Future Occurrences:** Displayed with lighter shading

Mobile Responsiveness

The COMPASS interface adapts to different screen sizes:

- **Desktop:** Full-featured interface with all columns and details
- **Tablet:** Streamlined interface with essential functions
- **Mobile:** Simplified view focusing on the most important actions

Keyboard Shortcuts

Speed up your workflow with keyboard shortcuts:

- **N:** Create new task/todo (depending on current view)
- **E:** Edit selected item
- **D:** Delete selected item

- **F**: Open filter panel
- **S**: Open search
- **Esc**: Close current dialog or panel
- **?**: Show all keyboard shortcuts

Customization

Personal Preferences

Customize your experience:

1. Go to Settings > Preferences
2. Adjust display settings like density and theme
3. Set default views for tasks and calendar
4. Configure notification preferences

Dashboard Widgets

Customize your dashboard:

1. Go to the Dashboard
2. Click "Customize" in the top-right corner
3. Drag and drop widgets to arrange them
4. Add or remove widgets based on your needs

Troubleshooting

Common Issues

- **Loading delays**: Refresh the page if content doesn't load
- **Display issues**: Try toggling between light and dark mode
- **Filter problems**: Clear all filters and start again
- **Editor not saving**: Check your internet connection

Error Messages

Common error messages and their solutions:

- **"Unable to save"**: Check your connection and try again
- **"Unauthorized"**: You may need to log in again
- **"Permission denied"**: You may not have access to this resource
- **"Validation error"**: Check that all required fields are filled correctly

Support

If you encounter issues:

1. Check the documentation for guidance
2. Use the AI assistant for context-aware help
3. Contact support through the Help menu
4. Report bugs using the feedback button