End User Guide for TaskOrbit Application

Contents

Chapter 1. Overview

What is TaskOrbit

Here you will get information about what is TaskOrbit.

TaskOrbit is a cloud-based project and task management platform designed to help teams organize their work, collaborate seamlessly, and deliver results faster. Whether you’re managing simple to-do lists or complex projects across multiple teams, TaskOrbit offers flexible tools like task boards, calendars, automations, and integrations — all in one easy-to-use interface.

Chapter 2. Task Management

What is task management

Here you will get information about what is task management in TaskOrbit.

Task Management in TaskOrbit is how you create, organize, and track individual work items. It lets you add due dates, assign teammates, set priorities, break work into checklists, and link tasks with dependencies or recurring schedules to keep everything on track.

How to create and manage tasks

Here you will get instructions about how to create and manage tasks in TaskOrbit.

To successfully create and manage tasks in TaskOrbit:

- You must first be logged into the application.
- You must have the appropriate user permissions to create or edit tasks within the selected project.

1. Open a project and click **“+ New Task”**.
2. Enter a **clear task title**.
3. Add a **description** with context or links.
4. Assign a **due date** and **responsible teammate**.
5. Add **checklist items** for sub-steps.
6. Attach files or add **tags**.
7. Click **Create** to save.

As a marketing coordinator, you create:

- Task: "September newsletter copy"
- Checklist: Draft → Review → Approve → Schedule
- Assignee: @Emily
- Due Date: Sept 5
- Tag: Urgent

Chapter 3. Project Management

What is project management

Here you will get information about what is project management in TaskOrbit.

Project Management in TaskOrbit is where you structure your team's work into organized projects. You can build boards, lists, or calendars, define workflow stages, invite your team, and reuse templates or milestones to guide projects from start to finish.

How to create a project board

Here you will get instructions about how to create a project board.

To successfully create a project board:

- You must be logged into the application.
- You must have permission to create new projects (typically for team leads or project managers)

1. Click **Projects > New Project**.
2. Name your project and choose a view (Board, List, Calendar).
3. Add workflow stages (columns like "To Do", "In Progress").
4. Invite team members and assign roles.
5. Start adding tasks manually or from a template.

As a product manager, you create:

- **Project:** "Q3 Product Launch"
- **Columns:** Planning → Design → Development → QA → Launch
- **Team Members:** Dev, Design, QA, Marketing

Chapter 4. Automations

What is automation

Here you will get information about what is automation in TaskOrbit.

Automations in TaskOrbit help you eliminate repetitive work. They automatically perform actions—like sending reminders or assigning checklists—based on triggers and rules you define, so your team can focus on what matters most.

How to enable prebuilt rules

Here you will get instructions about how to enable prebuilt rules.

To successfully enable prebuilt rules:

- You must be logged into the application.
- Have permissions to enable or modify automations for your workspace or project.

1. Go to **Settings > Automations.**
2. Click **Add Automation > Use Template.**
3. Choose a rule (e.g., notify on overdue task).
4. Enable the rule.

Rule: “Notify assignee when task is overdue.”

If assignee forgets a task, he or she gets an email and Slack ping automatically.

Chapter 5. Integrations

What are integrations

Here you will get information about what are integrations in TaskOrbit.

Integrations in TaskOrbit let you connect your workspace with other tools like Slack, Google Calendar, GitHub, or Zapier. This keeps your work in sync, reduces manual updates, and ensures everyone stays informed across platforms.

How to connect Calendar or Slack

Here you will get instructions about how to connect calendar or Slack.

To successfully connect Google calendar or Slack:

- You must be logged into the application.
- Have credentials for the third-party service (Google/Slack) you want to connect.
- Have authorization rights to allow TaskOrbit access.

1. Go to **Settings > Integrations.**
2. Select Slack or Google Calendar.
3. Authorize the integration.
4. Choose what to sync (e.g., due dates, new assignments).

Your due tasks appear in Google Calendar, and you get a Slack DM when assigned a new one.

Chapter 6. Dashboards and Reports

What are dashboards and reports

Here you will get information about what are dashboards and reports in TaskOrbit.

Dashboards & Reports in TaskOrbit give you a visual overview of team activity, task progress, and project health. You can use built-in dashboards or create custom reports to monitor workloads, spot bottlenecks, and share insights with stakeholders.

How to view team activity

Here you will get instructions about how to view team activity.

To successfully view team activity:

- You must be logged into the application.
- Have access rights to view dashboards and project data.

1. Click **Dashboard > My Dashboard.**
2. Use default widgets(e.g. "Task due today" , " Overdue tasks").
3. Filter by user or project.

During morning standup, you check:

- What's overdue
- Tasks completed by each team

Chapter 7. User Management and Roles

What is user management and roles

Here you will get information about what is user management and roles in TaskOrbit.

User Management & Roles in TaskOrbit is how you control who can see and do what. It lets you invite team members, assign them roles like admin, contributor, or viewer, and tailor permissions to protect sensitive data and streamline collaboration.

How to invite users

Here you will get instructions about how to invite users.

To successfully invite users

- You must be logged into the application.
- Have permission to invite new members to the workspace or project.

1. Go to **Settings > Members.**
2. Click **Invite Member.**
3. Enter email and choose a role: Admin, Contributor, Viewer.
4. Send invite.

You invite @Ravi from Finance as a Viewer to track task progress during budget planning, without giving edit access.