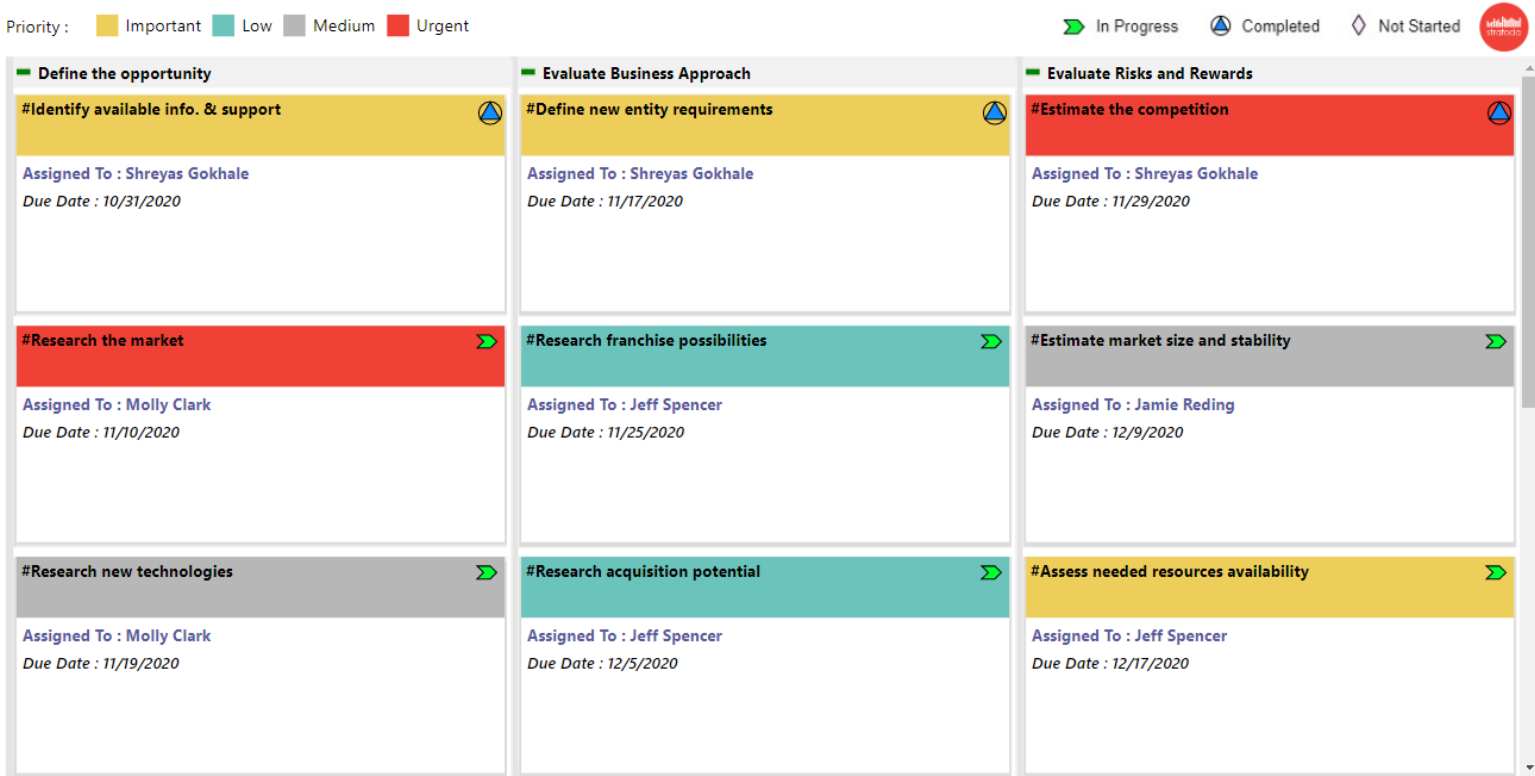


Stratada Taskboard for Power BI User Guide

The Taskboard is a Power BI custom visualization by Stratada that enables a Kanban Agile view of work. It helps in keeping track of Work Items, Stories, Bugs, Issues, Tasks in progress, their status and type along with the assigned watchers. It enables sharing the work plan and progress with the stakeholders. You can add any information to the cards and set categories and color metrics accordingly.



The visual can be configured as follows:

- Buckets (Optional)**

This is used to categorize the Tasks, Issues etc into different columns. In the above picture, Tasks under one phase are in one bucket. The 3 phases (buckets) are - 'Define the opportunity', 'Evaluate Business Approach' and 'Evaluate Risks and Potential'.

Buckets

Phase Name ▼ ✕

- Card Title (Required)**

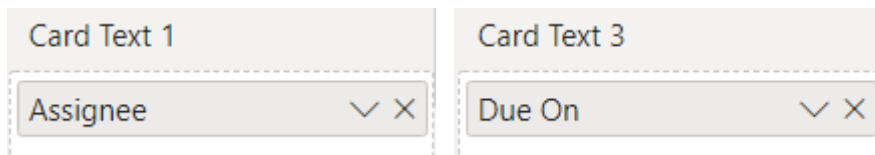
This is a required field and can be used to display Name of the Task / Issue. You can also use it to show the Task Number or other unique identifier.

Card Title

Title ▼ ✕

- **Card Text 1, Card Text 2, Card Text 3 (Optional)**

These 3 fields are optional and can be used to display additional information about the Tasks, Issues etc. In the above picture the name of the person to whom the task is assigned (assignee) is displayed in Card Text 1 and Due Date is displayed in Card Text 3 field. You can display any numerical / text data in these fields.



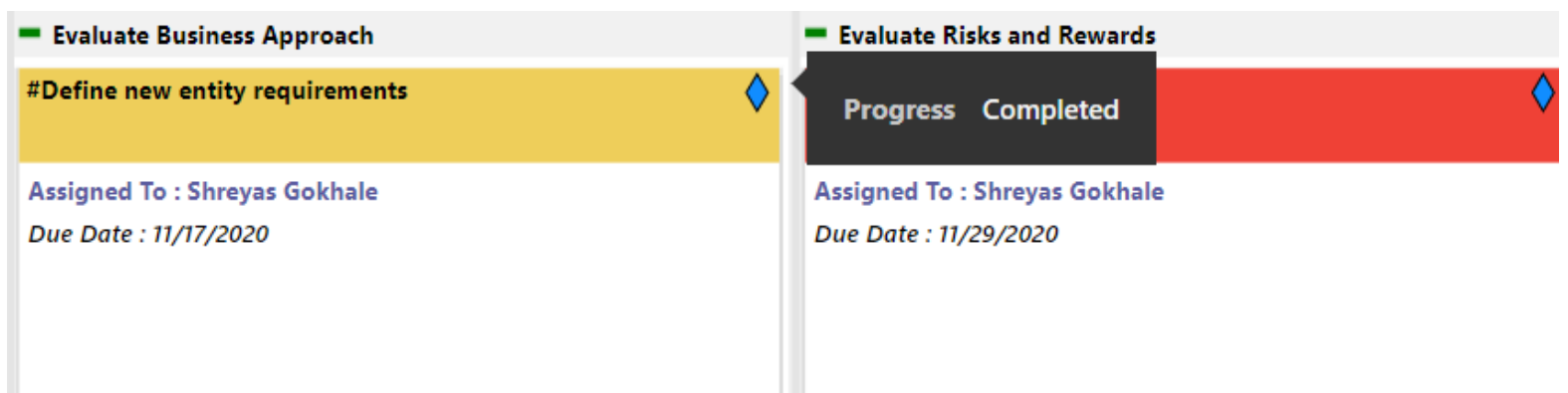
- **Card Category (Required)**

This is a required field and is used to categorize Tasks, Issues etc into different Types. While the 'Buckets' field puts items in different columns, the legend of the visual is governed by Card Category field. A different colour can be used for each category and the legend can be formatted in Format options. In the Taskboard above, every Priority is assigned a distinct colour.



- **Card Icon (Optional)**

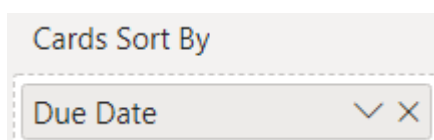
This field gives you the ability to display an icon in the top right corner of the Taskboard. You can add any metadata to this field (text, number, binary). When you hover over the icon, the data is displayed in the Tooltip. In the picture below, the progress of a Task is shown by different coloured icon.



- **Cards Sort By (Optional)**

This sorts the cards in ascending or descending order. Typically, the Due Date / Start Date column from the data is used in this field.

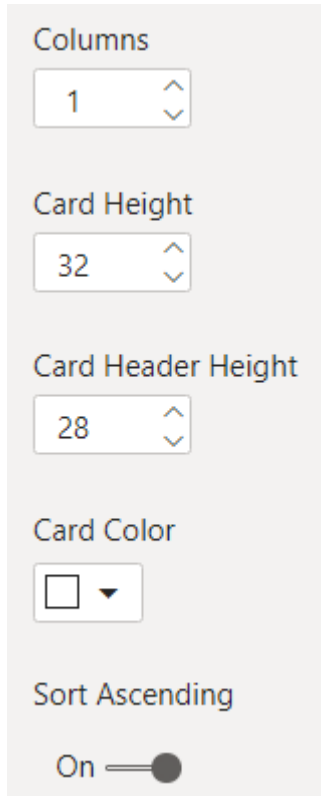
Note : This field only sorts the cards inside the bucket. You can arrange the buckets in the order of your choice from 'Bucket Settings' in Format Options. This is explained in next section.



Formatting Options :

- **Card Settings**

You can set the number of columns in each bucket. The Card Height, Card Header Height and Card Colour can be set as per your needs. If you are using 'Cards Sort By' field, you can toggle 'Sort Ascending' On / Off from here.

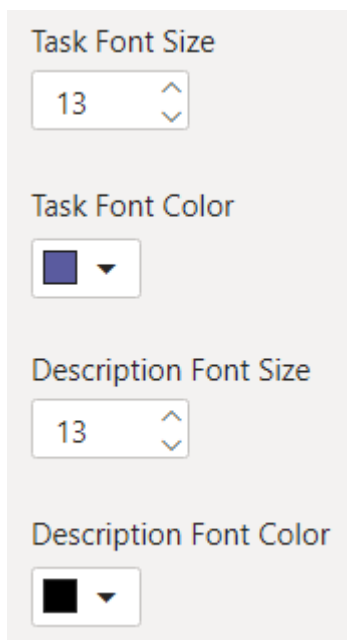


The screenshot shows a configuration panel for Card Settings. It includes five settings: 'Columns' set to 1, 'Card Height' set to 32, 'Card Header Height' set to 28, 'Card Color' with a white color swatch, and 'Sort Ascending' which is turned 'On' via a toggle switch.

If you are using Task Number / Task Outline Number in Card Title field, you will get another toggle option 'Task Number Sorting'. Turning this on will sort the cards in numerical ascending order of Outline numbers.

- **Font Settings**

You can select colour and size of all the fields used in the Taskboard from here



The screenshot shows a configuration panel for Font Settings. It includes four settings: 'Task Font Size' set to 13, 'Task Font Color' with a blue color swatch, 'Description Font Size' set to 13, and 'Description Font Color' with a black color swatch.

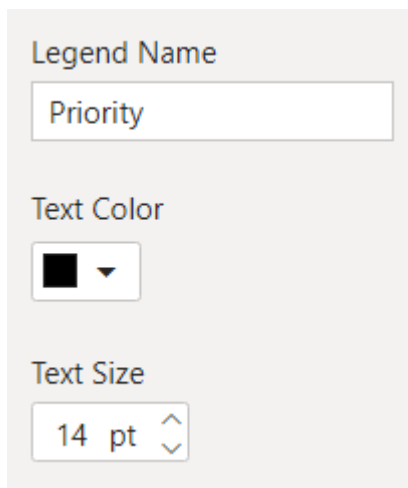
- **Category Colors**

You can set a different colour for each category from the standard unlimited colour picker.



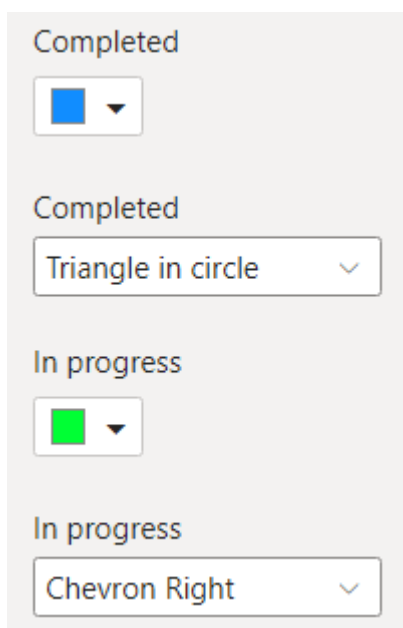
- **Legend**

You can enter the Legend Name and set the text size, colour of your choice.



- **Task Icons**

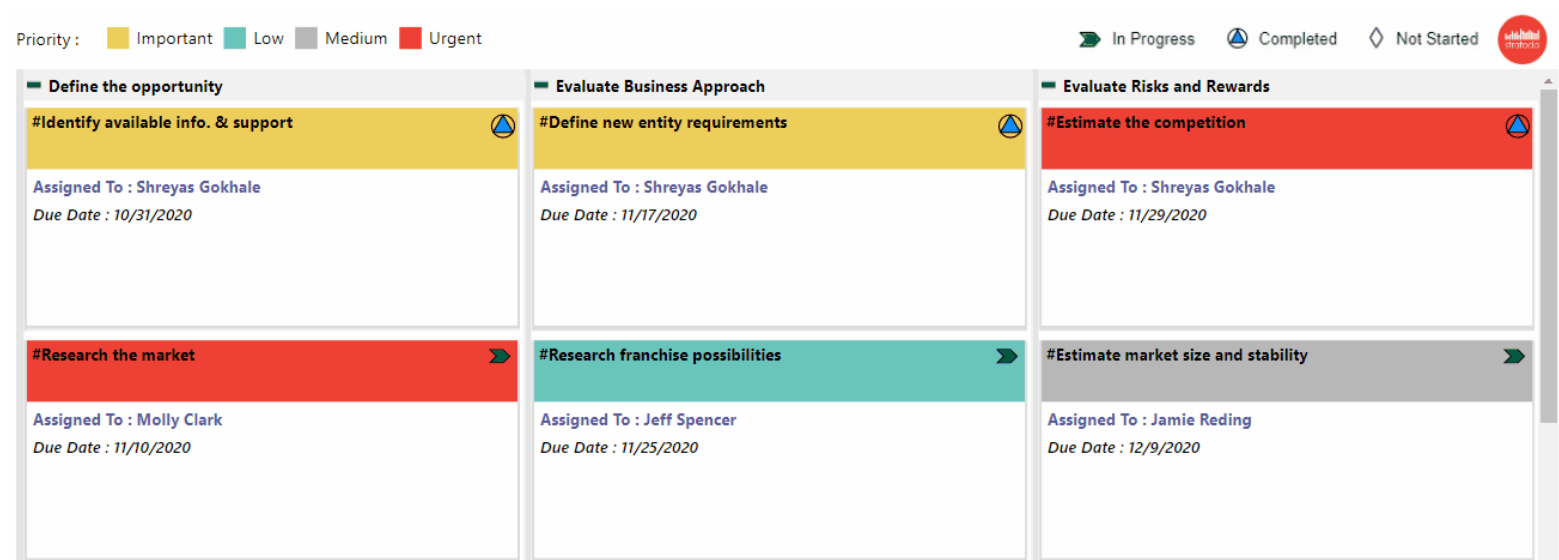
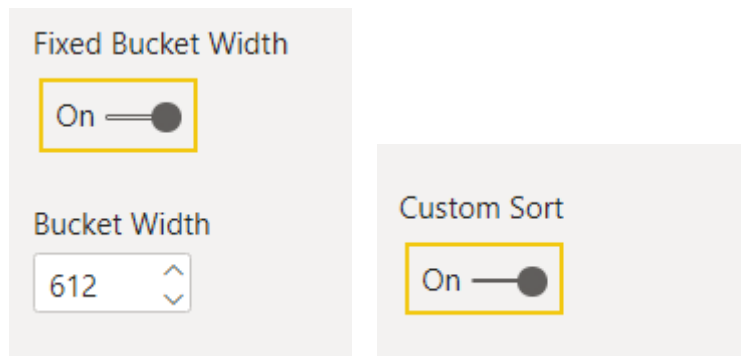
You can choose from more than 40 exotic shapes as Card Icons. Also, you can set a different colour for each Icon from the unlimited colour picker.



- Chevron Left
- Chevron Right
- Arrow Up
- Arrow Down
- Arrow Left
- Arrow Right
- Triangle in circle
- Downward triangle in circle
- Left triangle in circle
- Right triangle in circle
- Up arrow in circle

- **Bucket Settings**

Here you can set the bucket width to a certain fix value. Every bucket in the Taskboard will be of corresponding width. If the buckets do not fit on the canvas, a scroll bar will appear on the bottom of the Taskboard to accommodate the extra buckets. When you toggle the 'Custom Sort' option On, you can drag and arrange the individual buckets in order of your choice. Have a look at the GIF below for better understanding.



Additional Settings :

- You can collapse any bucket by clicking on the small green – sign in the top left corner of each bucket. After collapsing a bucket, total number of cards in the bucket is displayed.

Note:

The Stratada Taskboard available on AppSource requires a license to enable full functionality. The unlicensed version has the following limitations:

1. A maximum of 3 buckets and 10 cards per bucket are supported in the standard version. If your data has more items, you will get a warning dialog box.
2. Only 1 Icon Shape (Diamond) is available for Task Icons.
3. The buckets cannot be arranged through drag and drop.

The licensed Pro Version of the Taskboard supports buckets and cards per bucket limited only by Power BI limitations. You can choose from more than 40 shapes for Card Icons. In addition, the buckets can be sorted through drag and drop.

Items / Stories

Priority: ■ 1 ■ 2 ■ 3

▲ Backlog Item ▲ Bug ◇ User Story

New	Committed	Approved	Done
<p>#Lengthy usernames not accepted ▲</p> <p>Tasks Complete : 0/0</p>	<p>#As a front-desk admin, I should be able to print breakfast coupons ▲</p> <p>Tasks Complete : 1/3</p>	<p>#Services has a bug ▲</p> <p>Tasks Complete : 0/0</p>	<p>#As a customer, I should be able to access the app on all mobile platforms ▲</p> <p>Tasks Complete : 3/3</p>
<p>#As a customer, I should be able to reserve a car ▲</p> <p>Tasks Complete : 0/1</p>	<p>#As a hotel manager, I should be able to see guest list for a date ▲</p> <p>Tasks Complete : 1/5</p>	<p>#As a customer, I should be able to have a keyless entry to my room via smartphone ▲</p> <p>Tasks Complete : 1/4</p>	<p>#Room lights are not dimming using mobile app ▲</p> <p>Tasks Complete : 0/0</p>
<p>#As a customer, I should be able to change reservation time ▲</p> <p>Tasks Complete : 0/1</p>	<p>#Search hotel works only for certain cities ▲</p> <p>Tasks Complete : 0/0</p>	<p>#As a customer, I should be able to use Bluetooth-enabled IoT Beacon sensors ▲</p> <p>Tasks Complete : 1/5</p>	<p>#As a customer, I should be able to have a responsive search experience ▲</p> <p>Tasks Complete : 4/4</p>

Products by Year & Status

Status: ■ Approved ■ Declined ■ Submitted

2020	2021	2022
<p>#Men's Apparel</p> <p>Brand Name : Umbrella Company Target Launch : 10/11/2020</p>	<p>#Home</p> <p>Brand Name : Acme Corporation Target Launch : 10/27/2021</p>	<p>#Men's Apparel</p> <p>Brand Name : Umbrella Company Target Launch : 5/30/2022</p>
<p>#Children's</p> <p>Brand Name : Acme Corporation Target Launch : 9/18/2020</p>	<p>#Children's</p> <p>Brand Name : MBF Target Launch : 5/19/2021</p>	<p>#Home</p> <p>Brand Name : Umbrella Company Target Launch : 5/15/2022</p>
<p>#Children's</p> <p>Brand Name : MBF Target Launch : 9/17/2020</p>	<p>#Home</p> <p>Brand Name : Umbrella Company Target Launch : 4/9/2021</p>	<p>#Home</p> <p>Brand Name : Acme Corporation Target Launch : 2/8/2022</p>

Tasks Grouped by Assigned To

Priority : ■ Important ■ Low ■ Medium ■ Urgent

▶ In Progress ▲ Completed ◇ Not Started



Shreyas Gokhale	Molly Clark	Jeff Spencer	Jamie Reding
#Evaluate initial profitability ◇ Bucket : Evaluate Risks and Rewards Due Date : 12/26/2020	#Interview Owners of similar business ◇ Bucket : Define the opportunity Due Date : 12/2/2020	#Review & modify strategic plan ◇ Bucket : Evaluate Risks and Rewards Due Date : 1/4/2021	#Identify operating costs ◇ Bucket : Define the opportunity Due Date : 12/21/2020
#Estimate the competition ▲ Bucket : Evaluate Risks and Rewards Due Date : 11/29/2020	#Research new technologies ▶ Bucket : Define the opportunity Due Date : 11/19/2020	#Assess needed resources availability ▶ Bucket : Evaluate Risks and Rewards Due Date : 12/17/2020	#Identify needed resources ◇ Bucket : Define the opportunity Due Date : 12/11/2020
#Define new entity requirements ▲ Bucket : Evaluate Business Approach Due Date : 11/17/2020	#Research the market ▶ Bucket : Define the opportunity Due Date : 11/10/2020	#Perform break-even analysis ◇ Bucket : Evaluate Business Approach Due Date : 12/14/2020	#Estimate market size and stability ▶ Bucket : Evaluate Risks and Rewards Due Date : 12/9/2020

Tasks Grouped by Progress

Priority : ■ Important ■ Low ■ Medium ■ Urgent



Not started		In progress		Completed	
#Interview Owners of similar business Bucket : Define the opportunity Due Date : 12/2/2020	#Identify needed resources Bucket : Define the opportunity Due Date : 12/11/2020	#Research the market Bucket : Define the opportunity Due Date : 11/10/2020	#Research new technologies Bucket : Define the opportunity Due Date : 11/19/2020	#Identify available info. & support Bucket : Define the opportunity Due Date : 10/31/2020	#Define new entity requirements Bucket : Evaluate Business Approach Due Date : 11/17/2020
#Perform break-even analysis Bucket : Evaluate Business Approach Due Date : 12/14/2020	#Identify operating costs Bucket : Define the opportunity Due Date : 12/21/2020	#Research franchise possibilities Bucket : Evaluate Business Approach Due Date : 11/25/2020	#Research acquisition potential Bucket : Evaluate Business Approach Due Date : 12/5/2020	#Estimate the competition Bucket : Evaluate Risks and Rewards Due Date : 11/29/2020	
#Evaluate initial profitability Bucket : Evaluate Risks and Rewards Due Date : 12/26/2020	#Review & modify strategic plan Bucket : Evaluate Risks and Rewards Due Date : 1/4/2021	#Estimate market size and stability Bucket : Evaluate Risks and Rewards Due Date : 12/9/2020	#Assess needed resources availability Bucket : Evaluate Risks and Rewards Due Date : 12/17/2020		

Note : All the fields used for the Taskboard must be Columns and **NOT** Measures. If you are using data from more than one table, the tables should be connected to each other.