Background

Registration

Work Groups

Project Management

My Page

Task Board

oRooster BETA

The ecosystem for managing the productivity of your workgroup.

Overview

Go back menu

Background

oRooster is a business process and resource management tool.

Manage all your entities, projects, and tasks in one place. Customize projects and collaborate with others.

From building the team to paying the invoice, do it all on oRooster.

Go back menu

Background

Work Group
- Manage multiple entities under one account
- Easily switch between work groups
- Add members for cross-functional team collaboration

Project Management
- Manage the full lifecycle of a project
- Create milestone-based deliverables
- Easily assign and create member tasks

Resource Allocation
- Efficiently manage resources per project
- Set budgeted costs and hours per resource

Time Management
- Clock in/out or enter time per task
- Enter time as billable or non-billable
- Submit timesheet to be actioned

Invoice Management
- Easily create an invoice from approved timesheet
- View all actioned invoices in one location
- Manage merchant accounts for payment

Business Intelligence
- Dashboards to measure productivity
- View progress per individual task or overall project
- Resource utilization insights

Go back menu

Registration

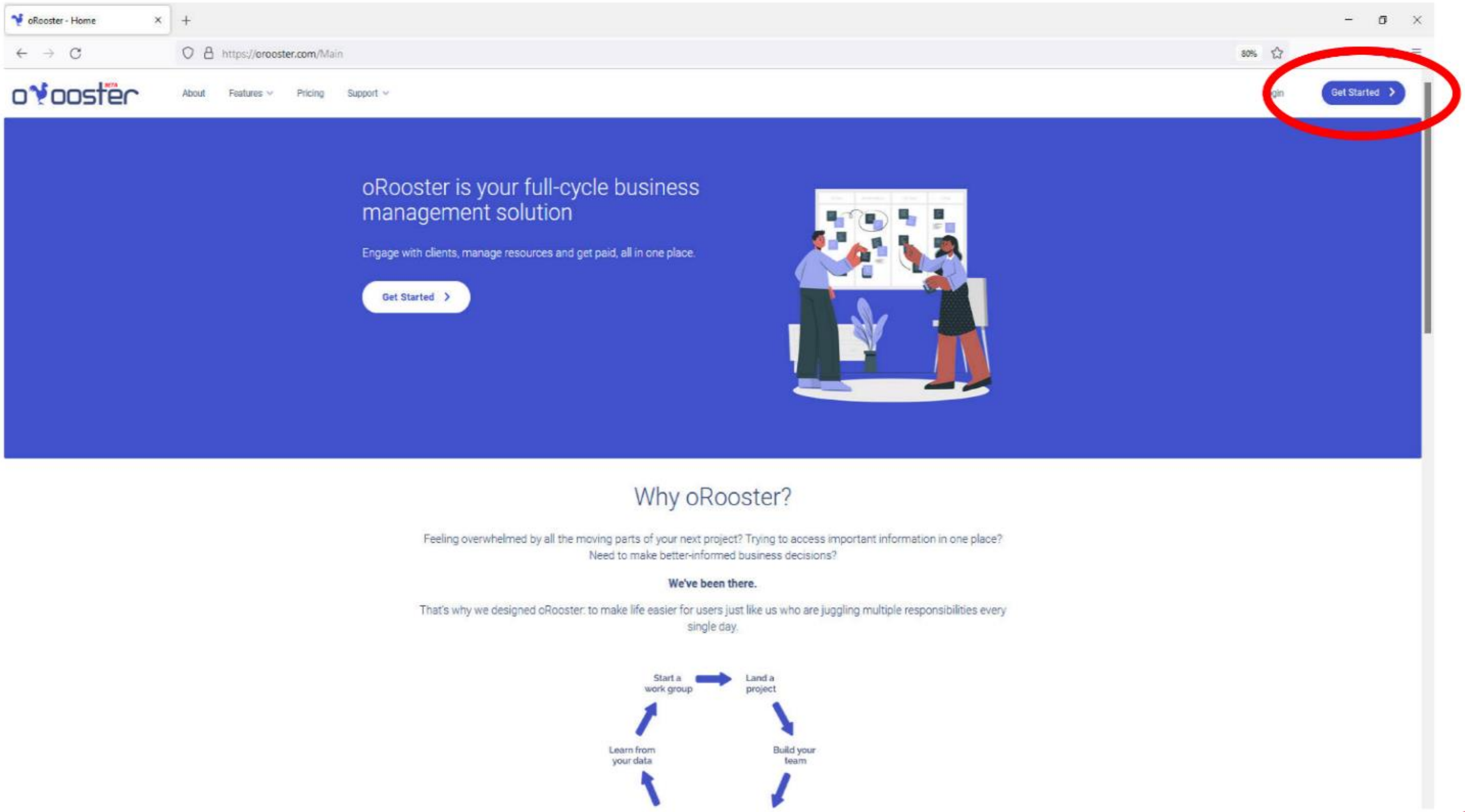
Get access to oRooster by creating your user account using the following steps.

Go back menu

2a

Go to oRooster's site

To register for an oRooster account, **go to the site** (orooster.com), and click on the "**Get Started**" button in the top right corner (highlighted in **red** below).

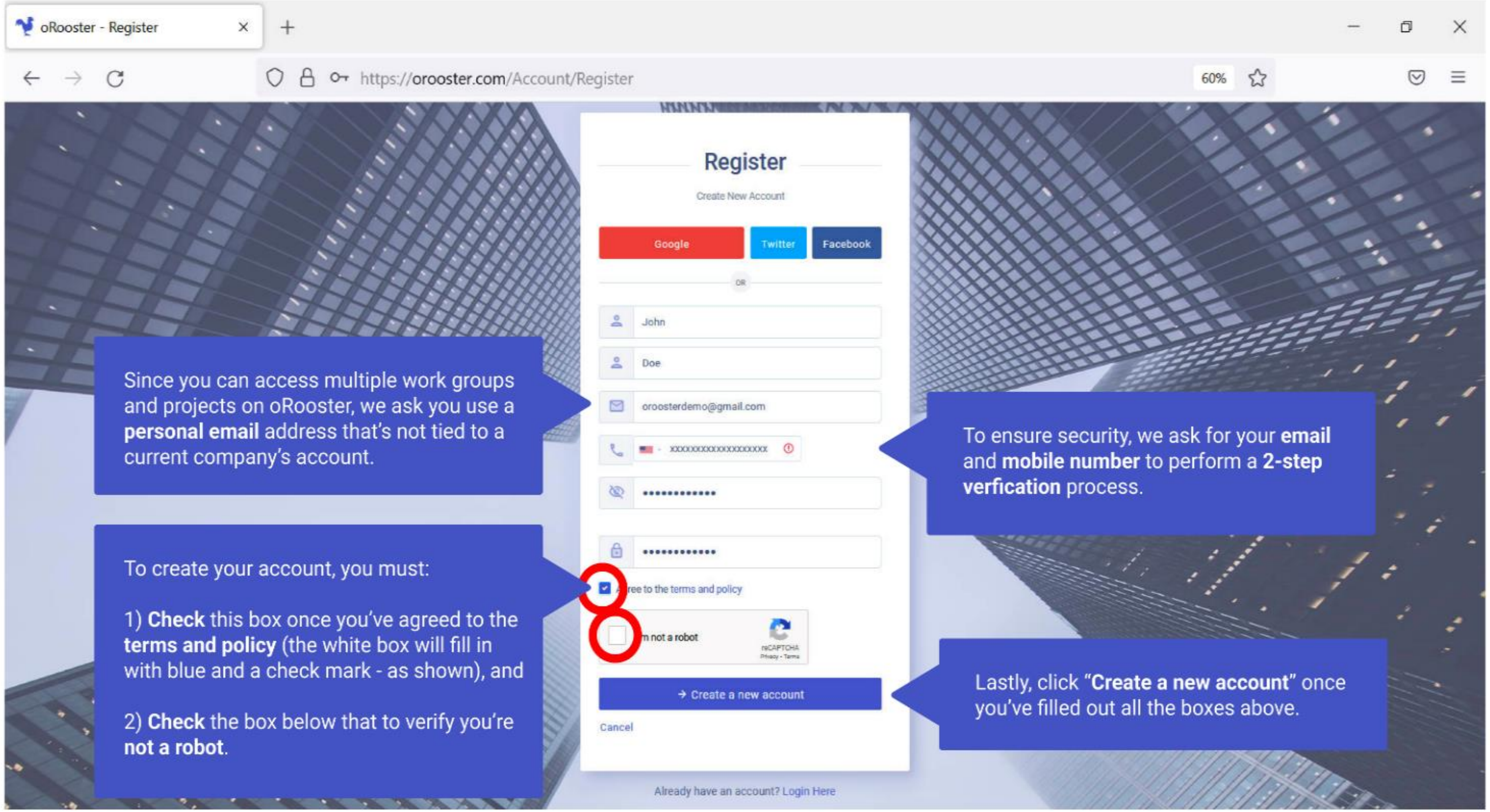


Go back Submenu

2b

Enter user info

Enter your **name**, *personal* **email**, **mobile number**, and a **password** to register.



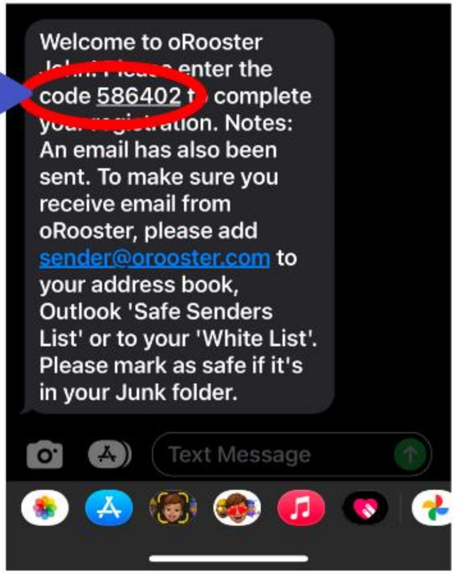
Go back Submenu

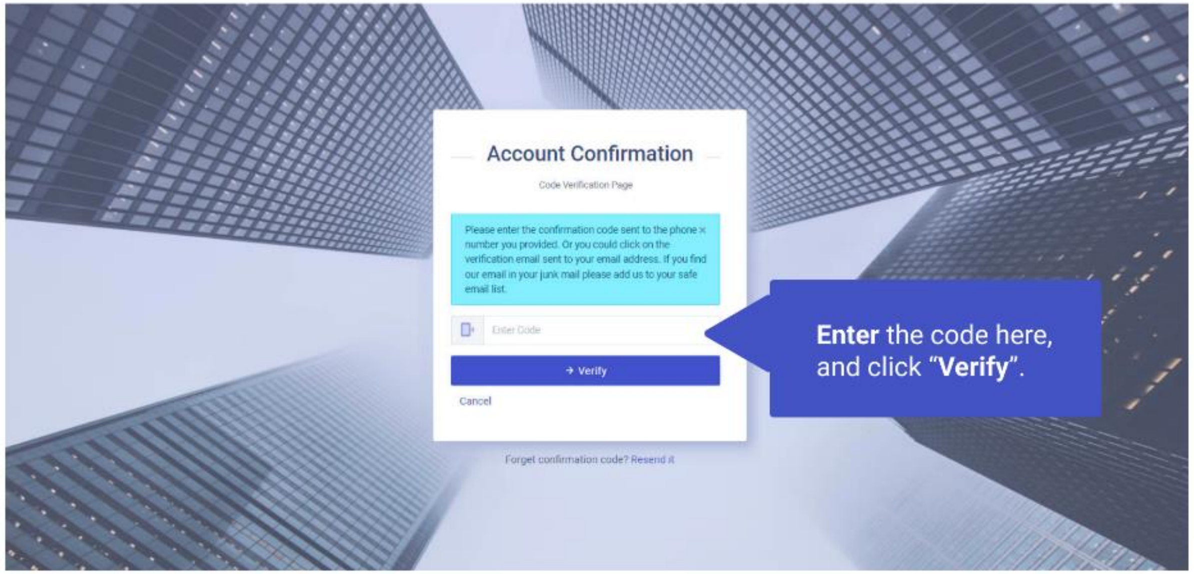
2c Confirm identity

There are 2 ways to confirm your identity: via text or email. Use the **code** sent in a text message, enter it on the oRooster website and click “**Verify**”.

Option 1: Via Text

Enter this **code** on the **oRooster website** to verify your identity.



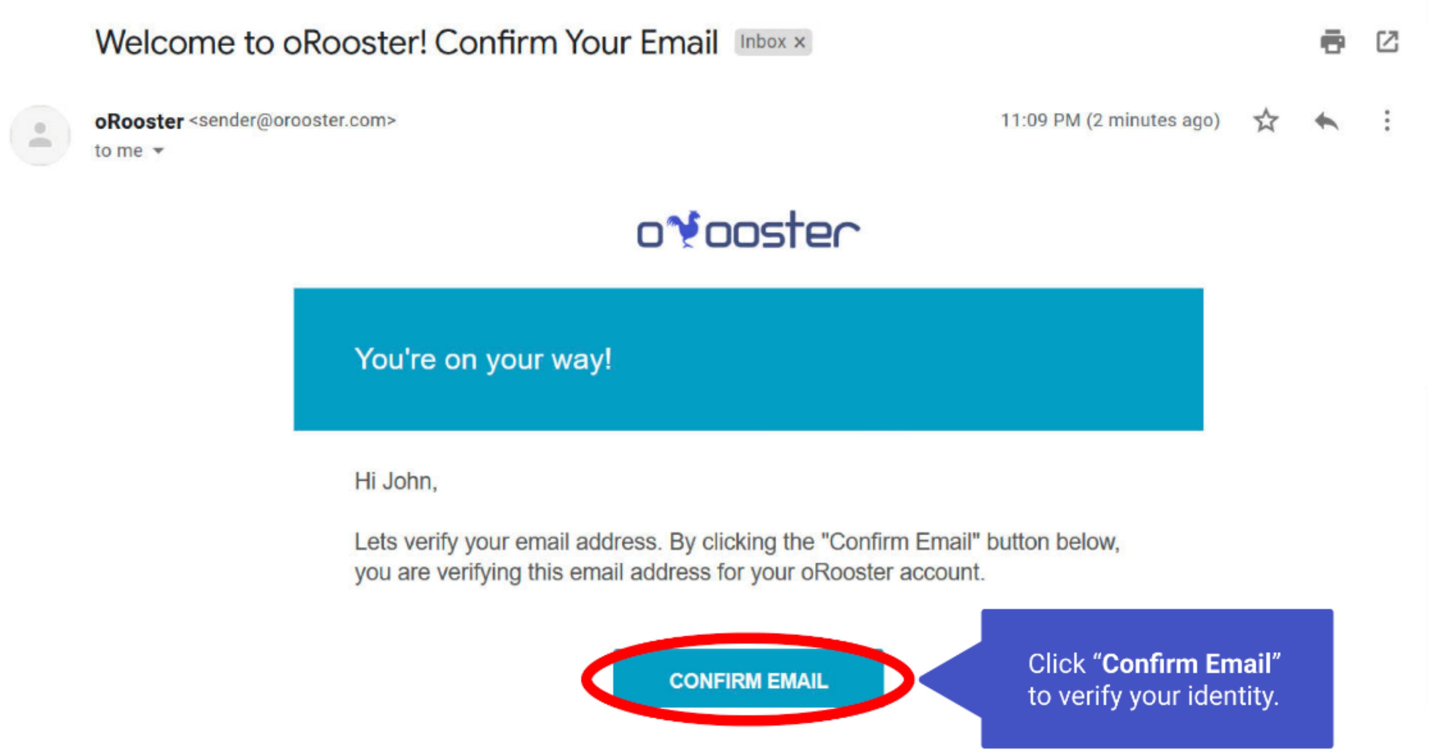


Go back Submenu

2d Confirm identity

If you're verifying your account via email, click the "Confirm Email" button that will take you to a confirmation message on oRooster's website.

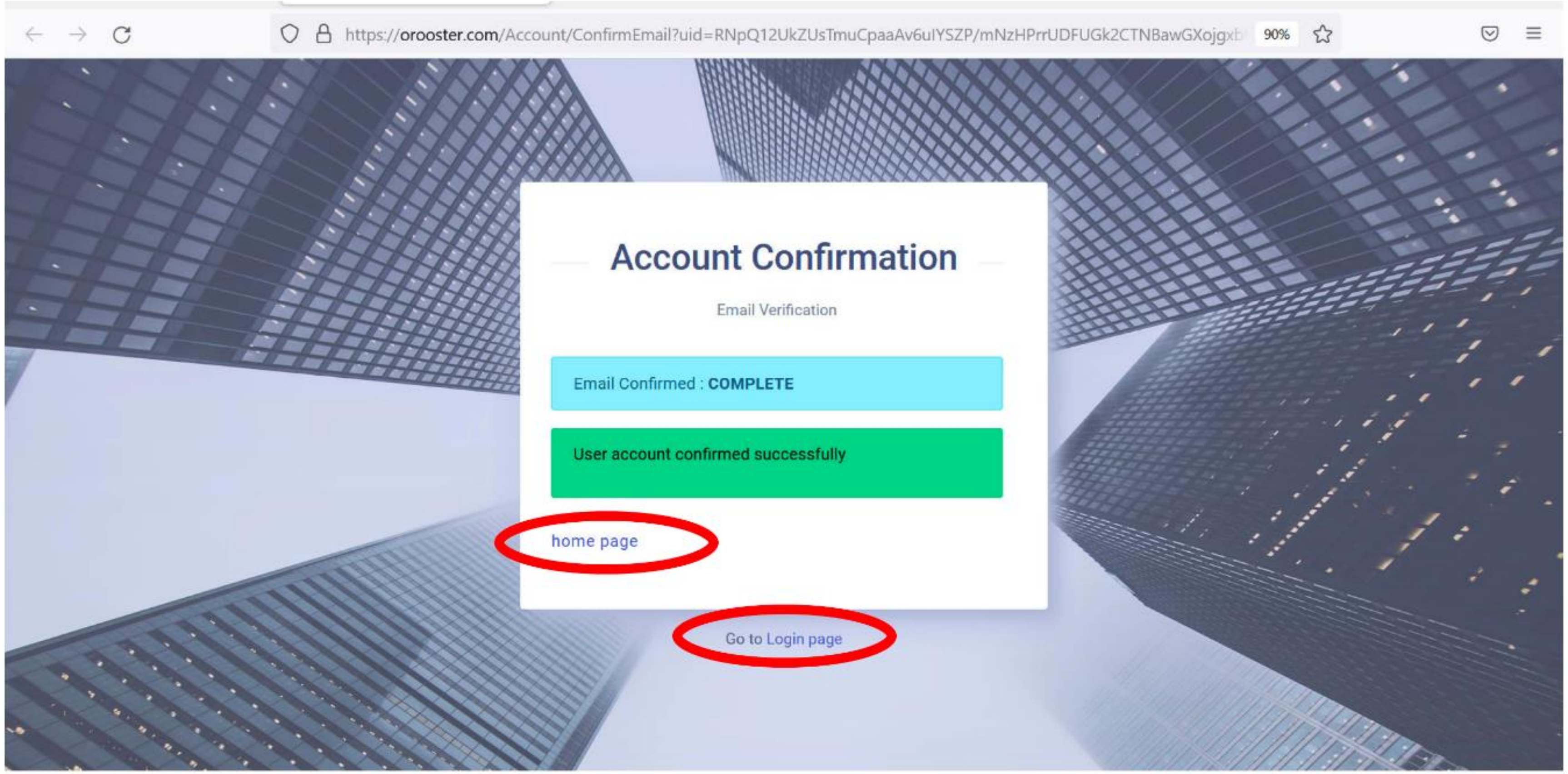
Option 2: Via Email



Go back Submenu

2e Confirmation

Once the account is verified, you should see the following **confirmation message**, and can continue to the **home** page or **login** page.



Go back Submenu

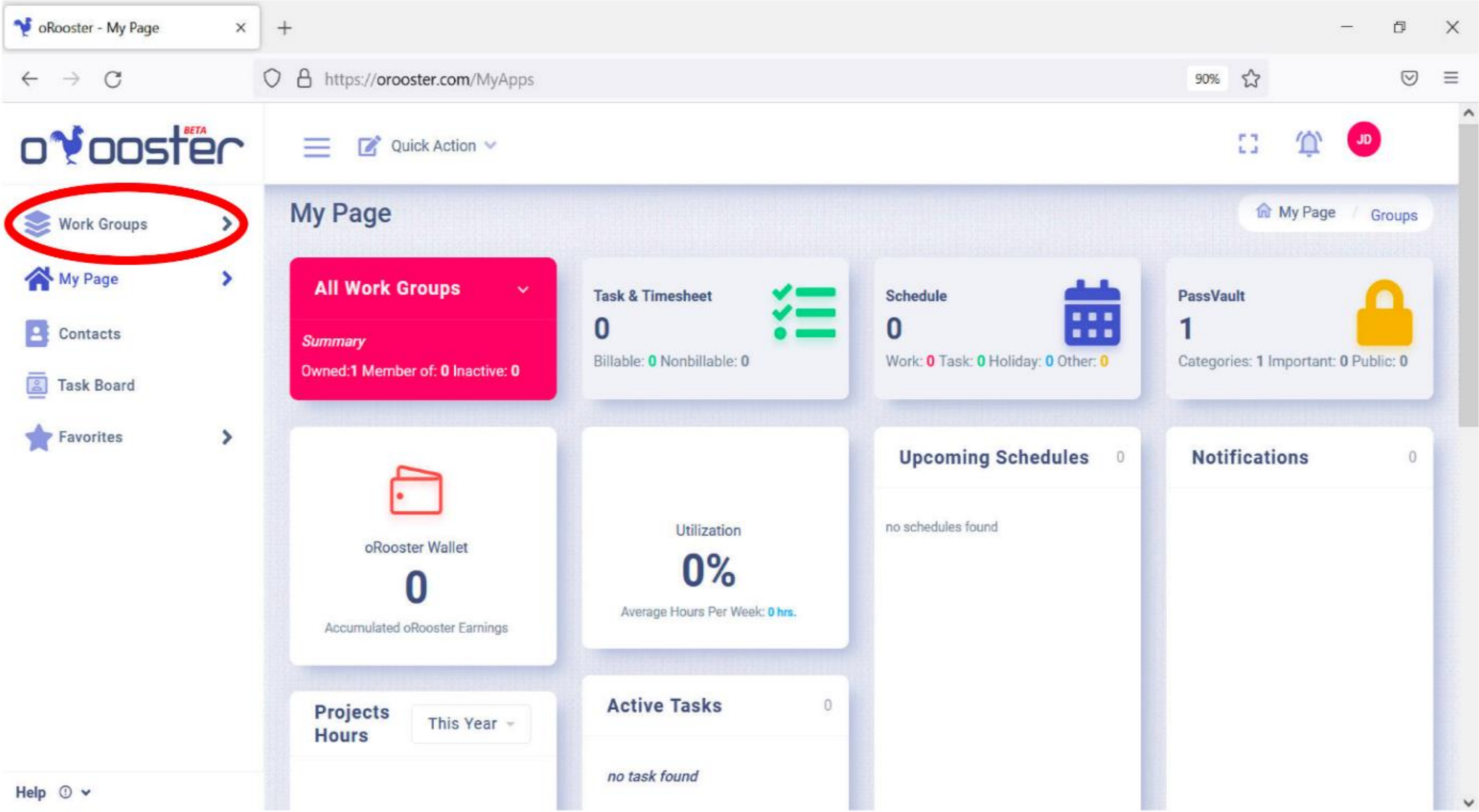
Work Group

Work Group operates at the company level. Keep all your clients, projects, and team members together so you can manage your business.

Go back menu

3a Navigate to "Work Groups"

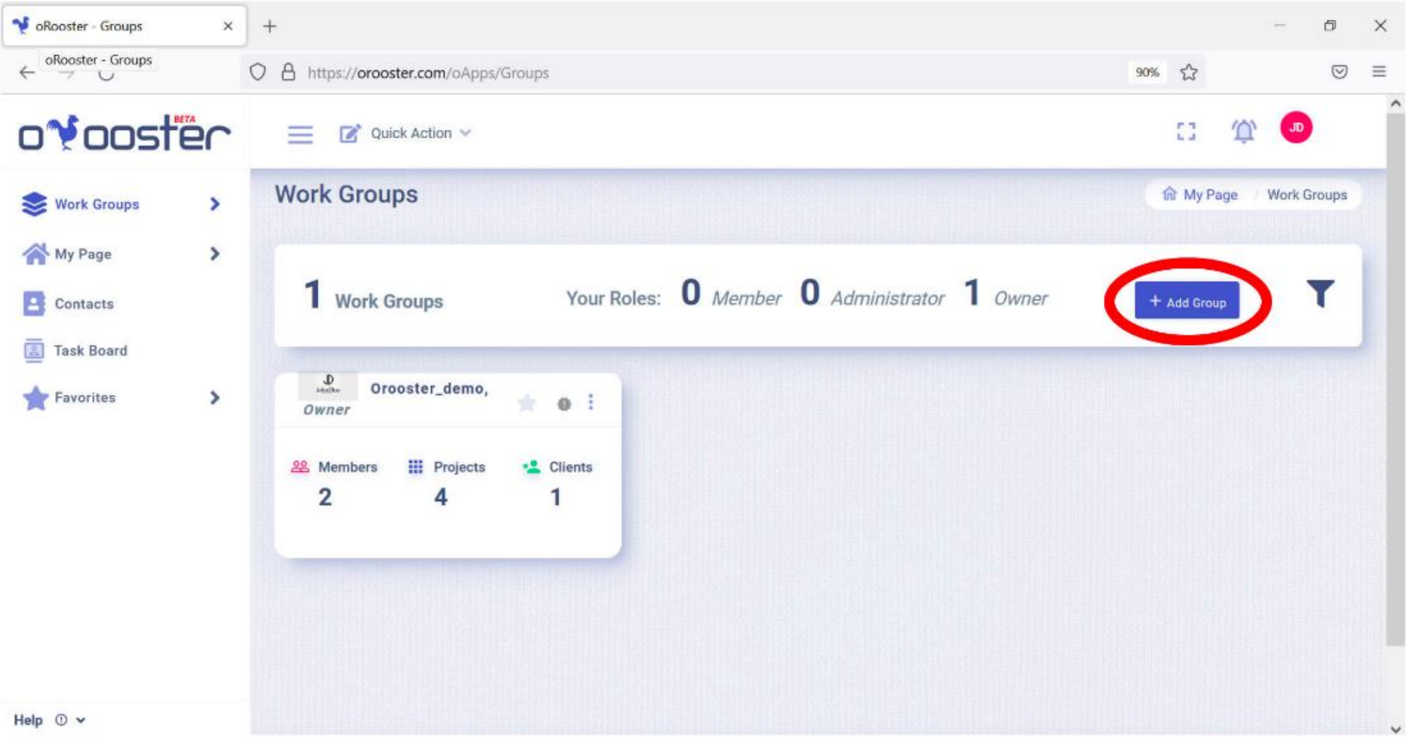
Navigate to the **left navigation menu**, and click on "**Work Groups**" to go to the "Work Groups" dashboard.

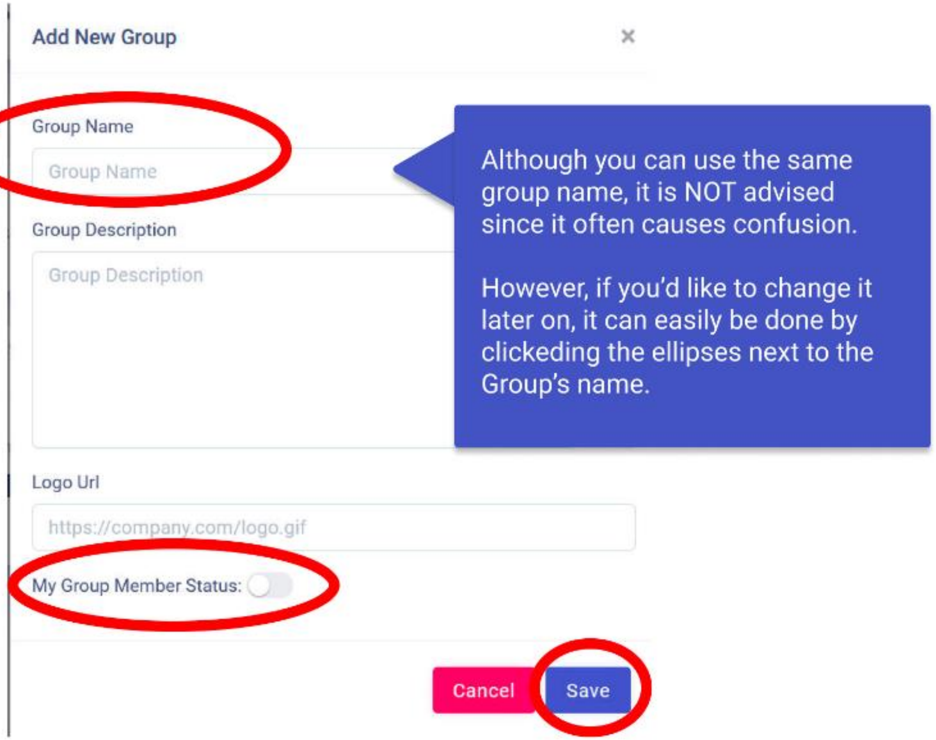


Go back Submenu

3b Enter Work Group info

Select “**Add Group**”. Enter a **work group name** & **description**. If you want to be added as an active member of the group, select “**My Group Member Status**”. Click “**Save**”.



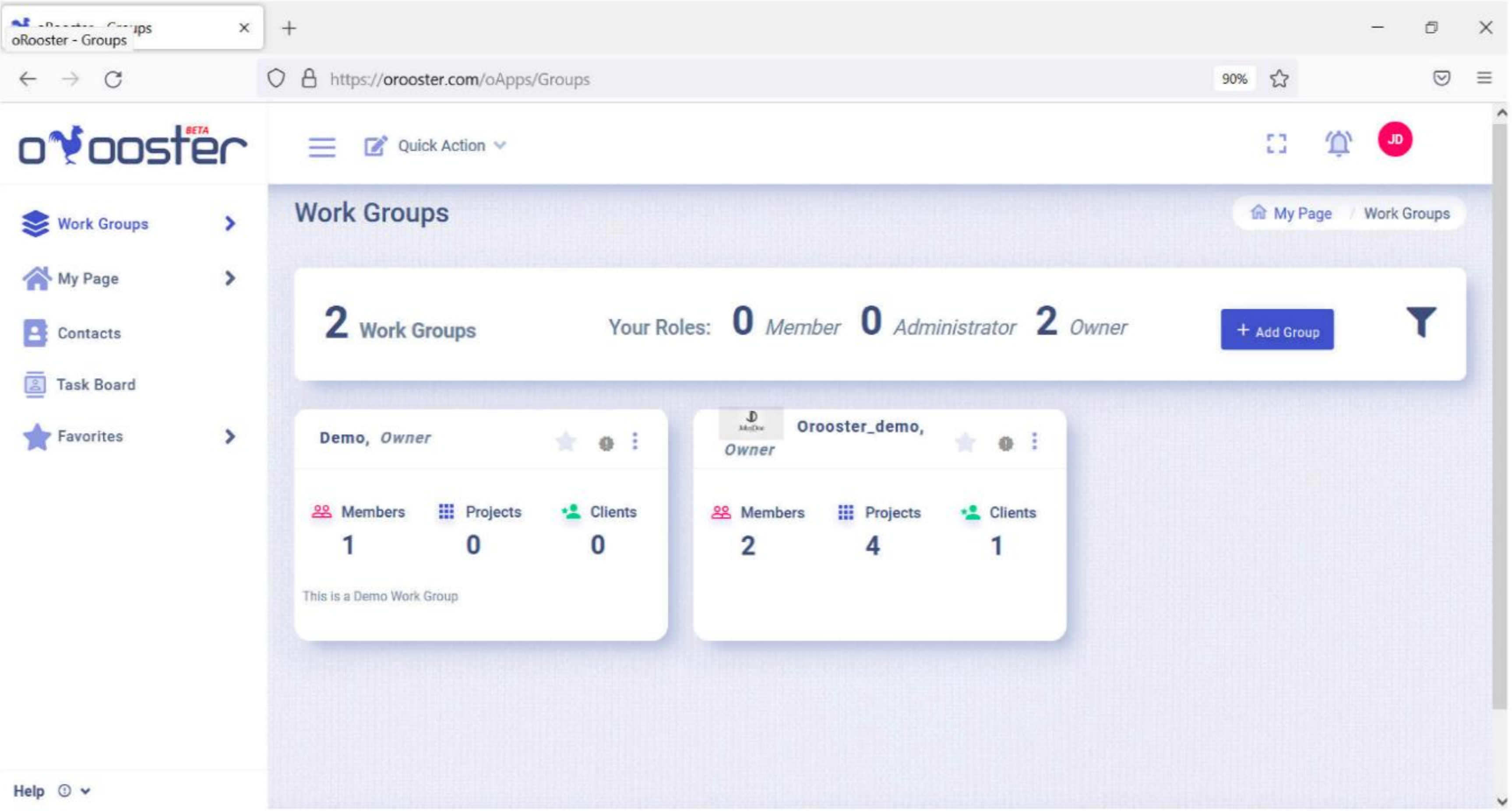


Go back Submenu

3c

Work Group created

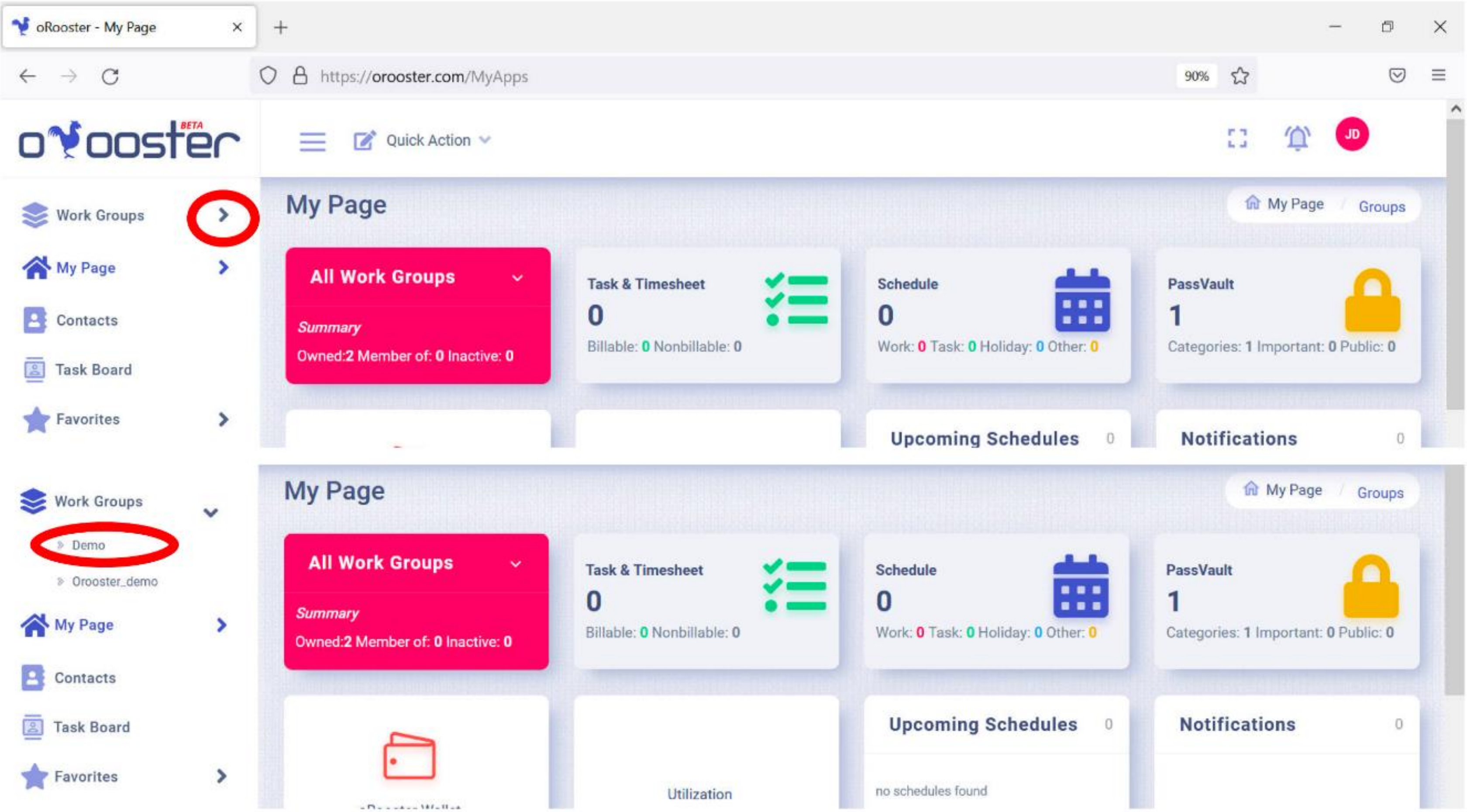
Once your work group is created, you should see the view below. And now you're ready to move on to the next steps!



Go back Submenu

3d Select work group

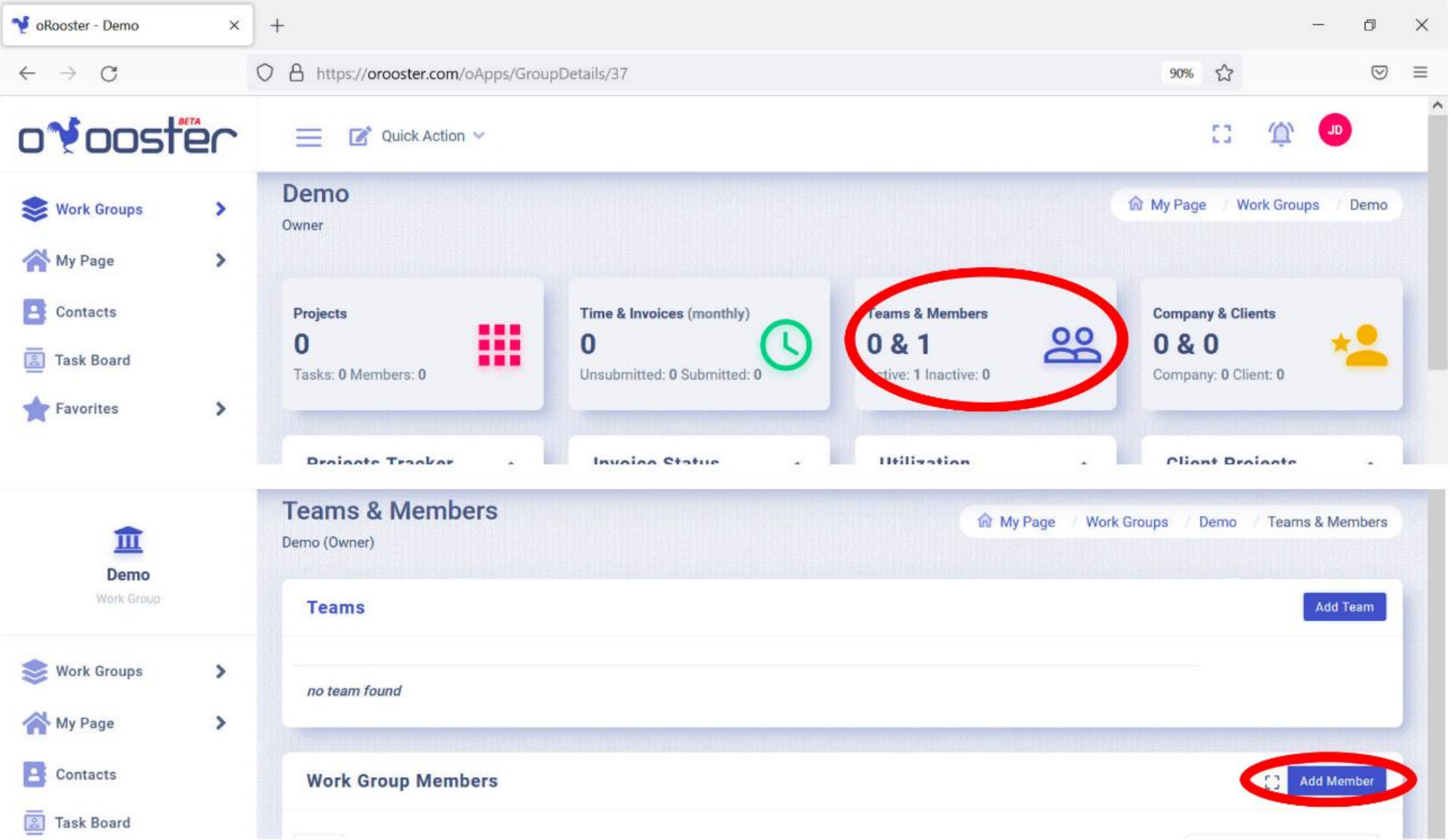
Navigate to **left navigation menu** and select **“Work Groups” drop-down**. Click on **work group name** to go to the work group’s details.



Go back Submenu

3e Add Members

We recommend creating Teams and categorizing members into Teams. To do this, select **Team & Members** card. Then, click on **Add Members***.



* Note: By default, the owner of the work group will already be added.

Go back Submenu

3f Enter member info

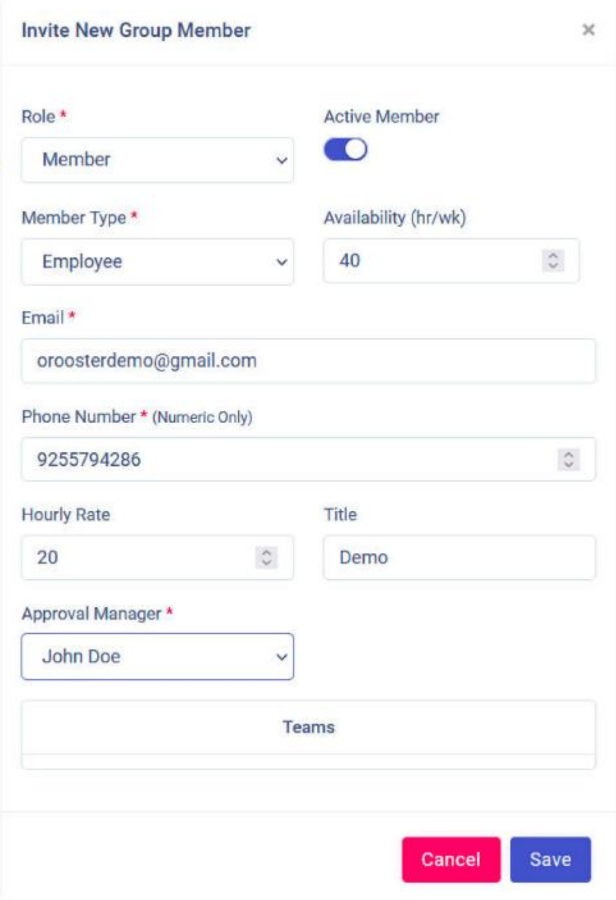
At least enter the member's **role**, member **type**, whether they're an "**Active Member**" (toggle to right to switch to "Yes"), **email**, **phone number**, and the **Approval Manager**. Click "**Save**" to send the invite.

Owner: Complete control over project

Administrator: Invite members, create and assign tasks, oversight on Task Board

Contributor: View tasks, and Task Board

Member: Oversight on project, no control



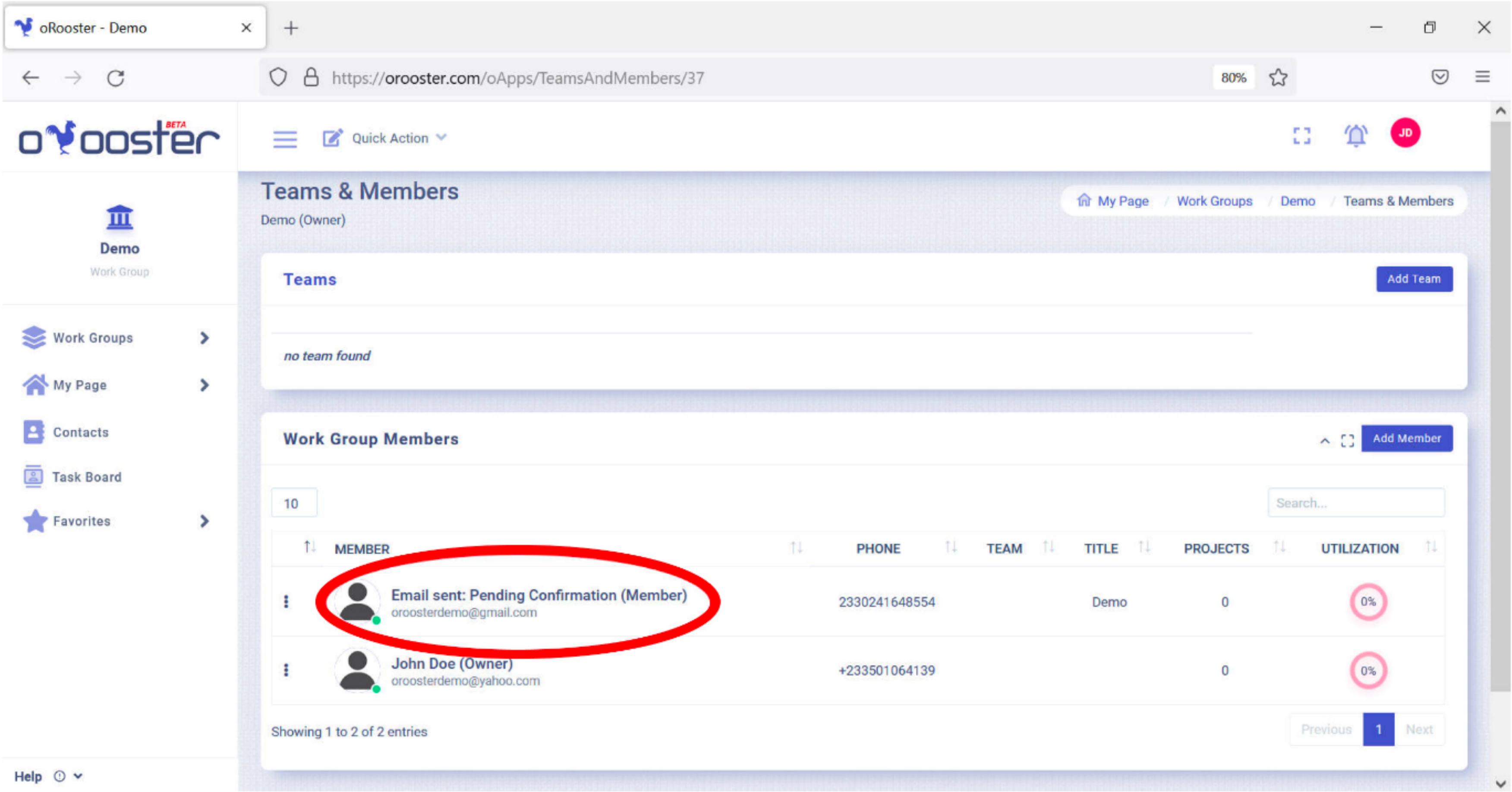
Active member will default to "Yes" when the member accepts - you can always set to "No" afterwards.

Email and **phone** number will be used to activate the member.

Go back Submenu

3g Member status

An invitation has been sent to the invite the member. You will see "**Pending Confirmation**" until the member accepts the invitation.



Go back Submenu

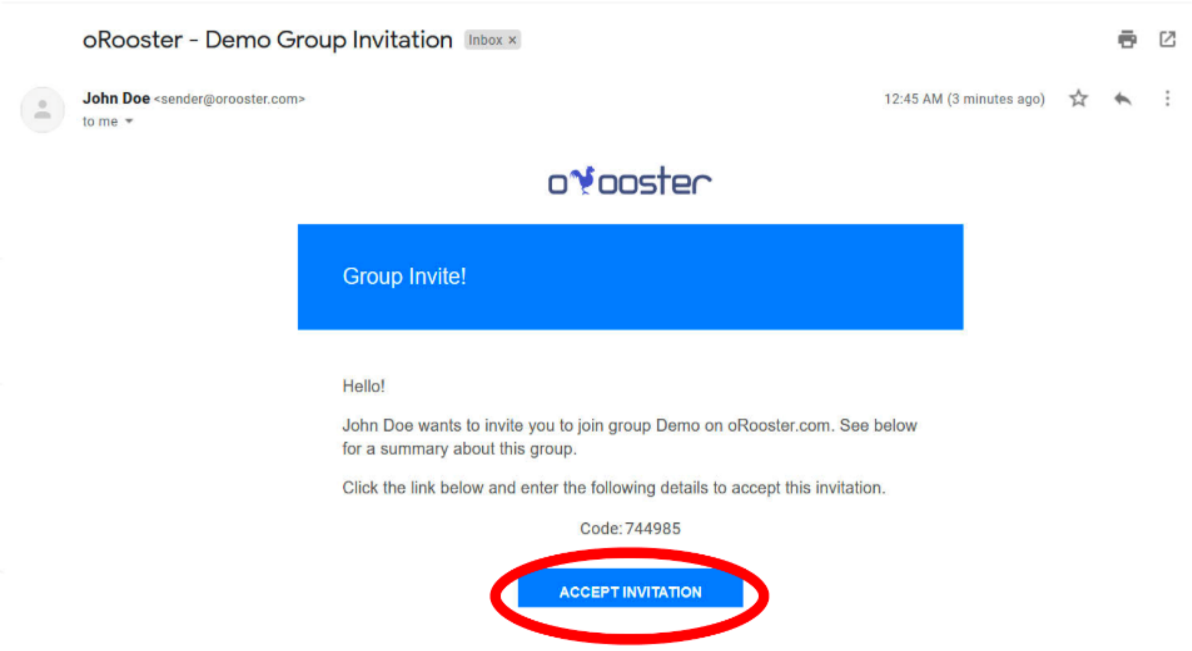
Work Group

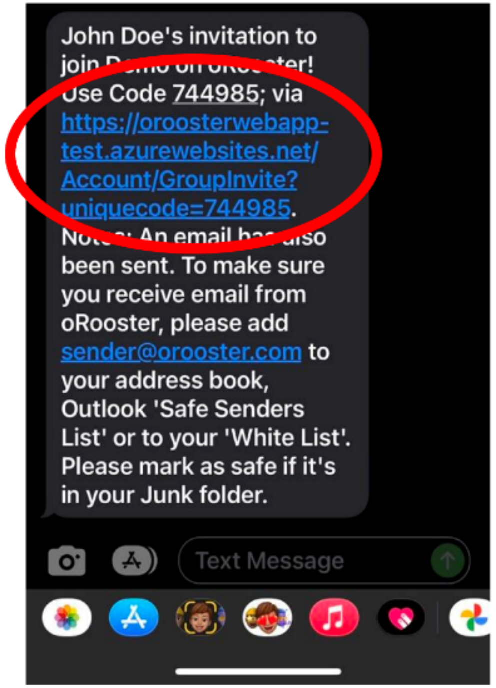
Accept Work Group Invitation

3h

Receive an email or text

Accept the work group invitation by **following the link** sent to your **email** address **or** your mobile **phone**.



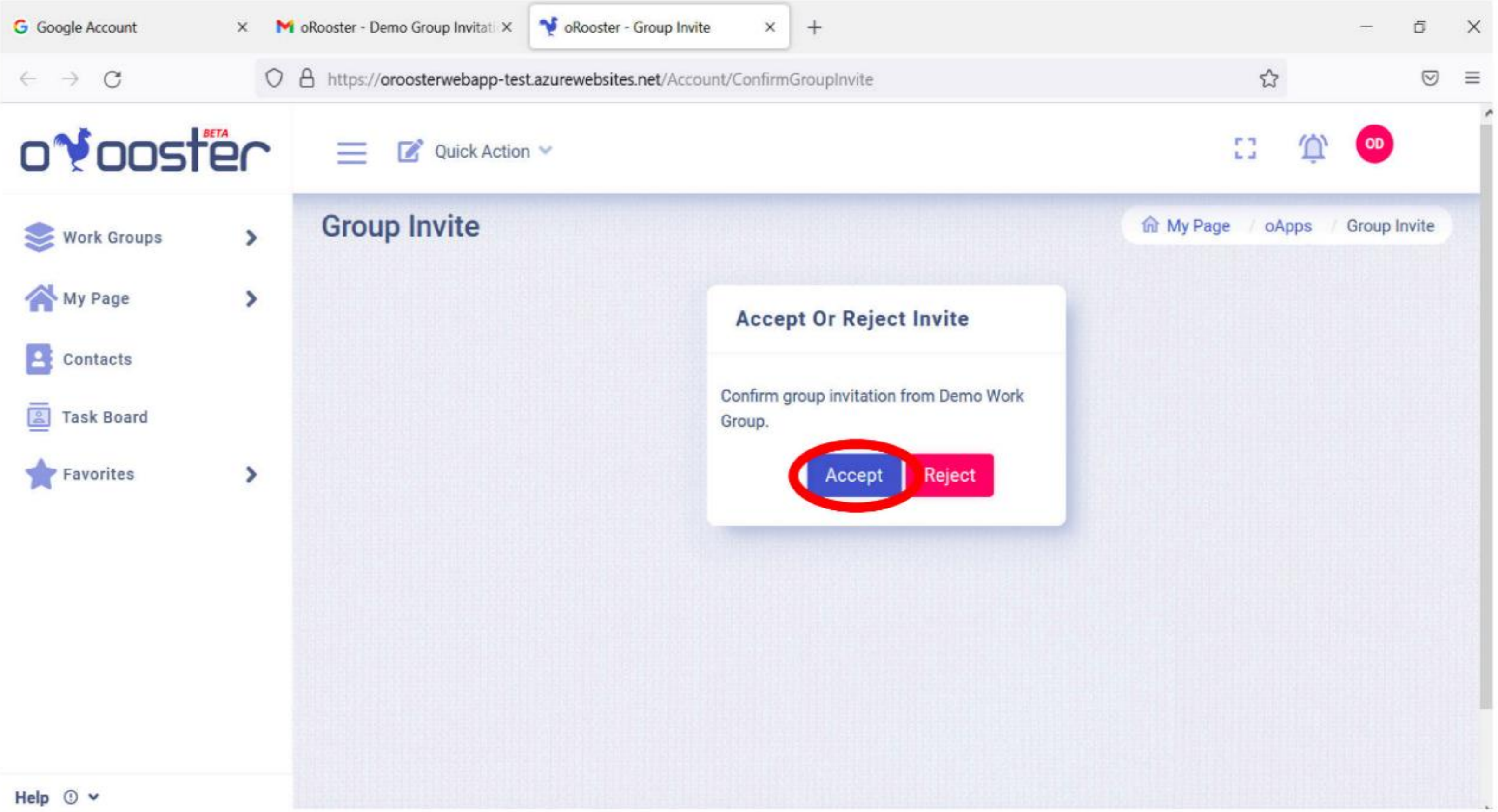


Go back Submenu

3i

Accept invitation

First, **log-in*.** Then, you'll see "Accept or Reject Invite" pop-up - click "**Accept**" to accept the invitation to the given work group.

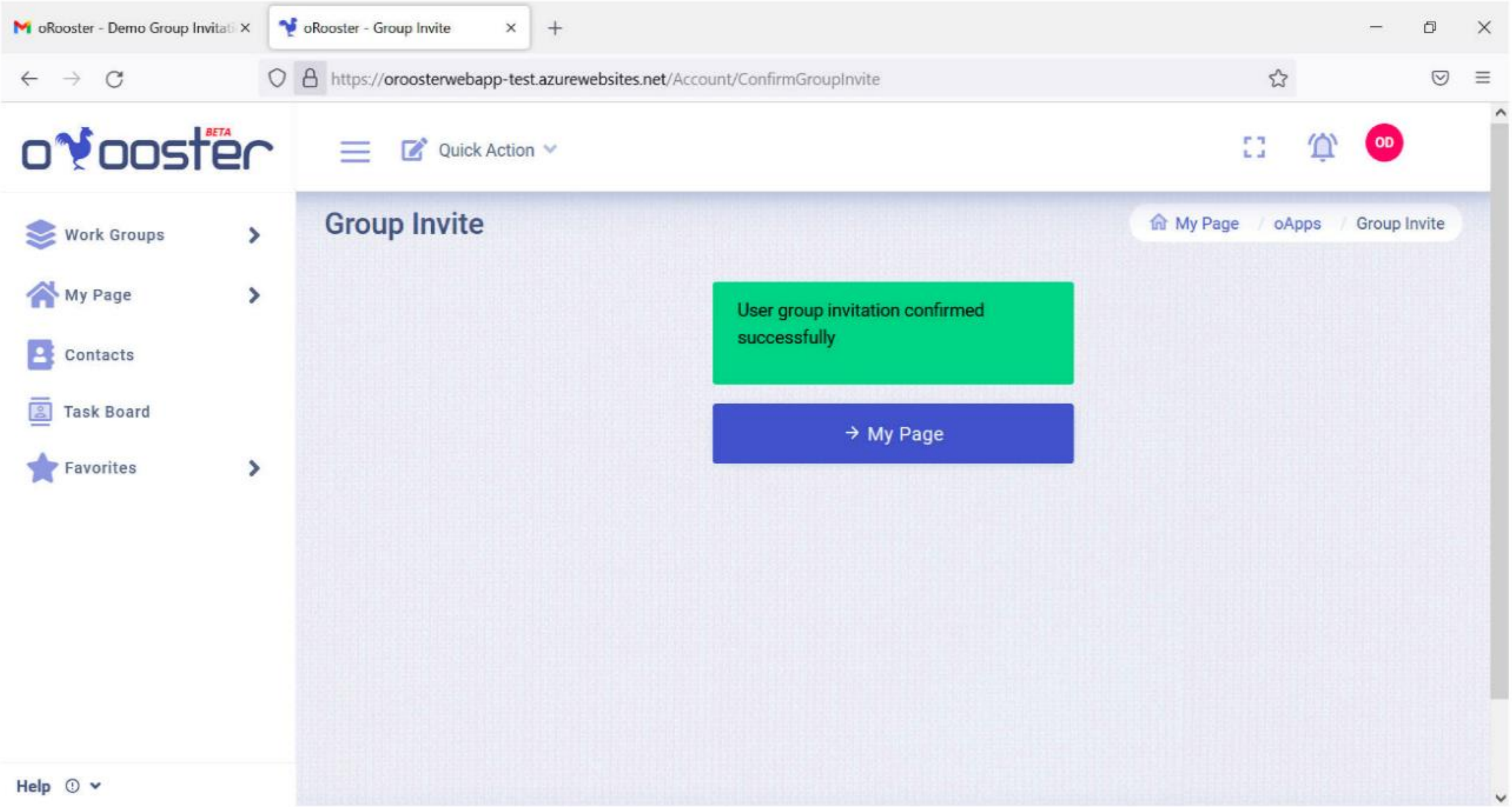


** Note: Your user account log-in does not have to be the same as the invitation email account. Depending on which oRooster account you log-in to accept the invitation, that will be the account associated with the work group. If you do not have a user account, refer to slides on "Registration".*

Go back Submenu

3j Confirmation

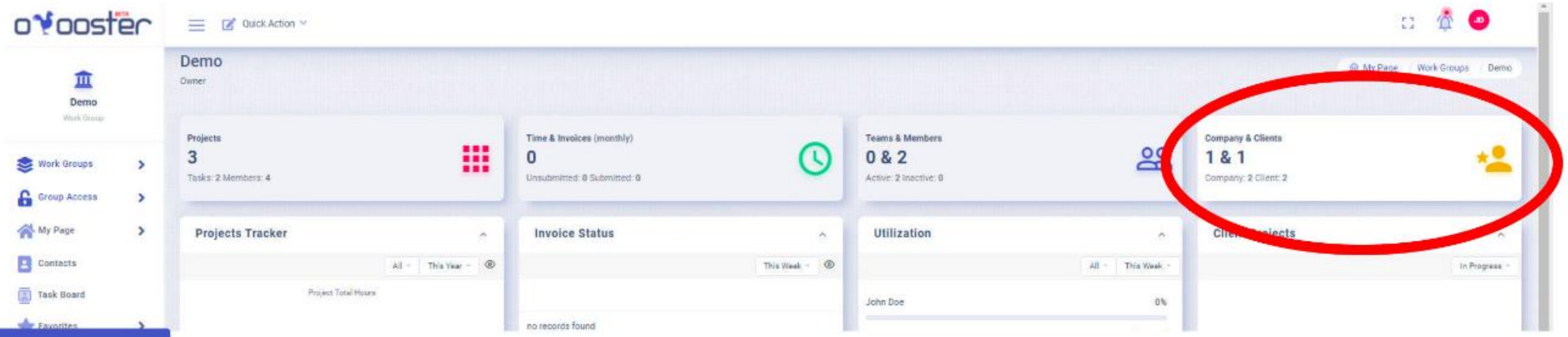
Once you've accepted the invite, you should see the view below. And now you're ready to move on to the next steps!



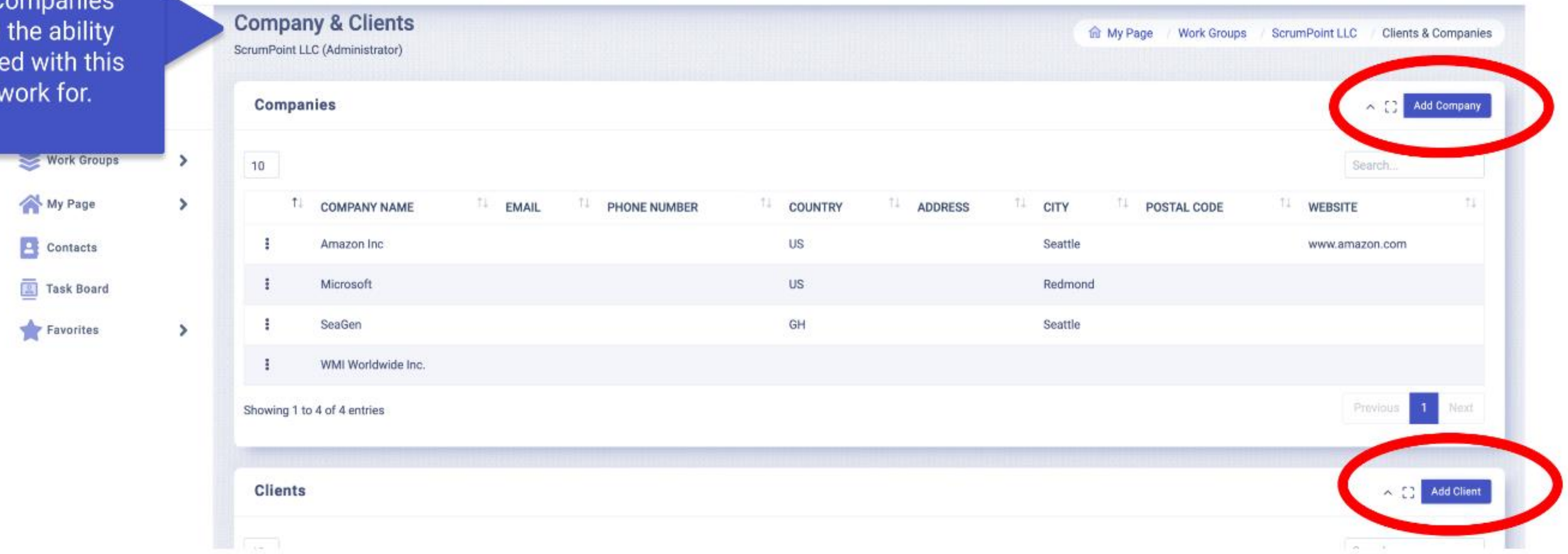
Go back Submenu

3k Select "Company & Clients"

Select **Company & Clients** card*. Then, click on "**Add Company**" or "**Add Client**" depending on your need.



Here, you see 2 sections: Companies and Clients. This gives you the ability to view all clients associated with this work group, and who they work for.



Go back Submenu

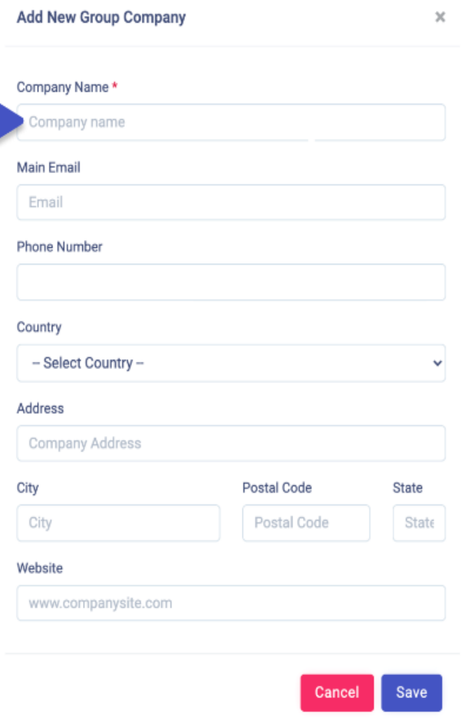
3I

Enter details

Enter the **company** or **client name** (required), but choose if you'd like to include their contact information, location, and other relevant information.

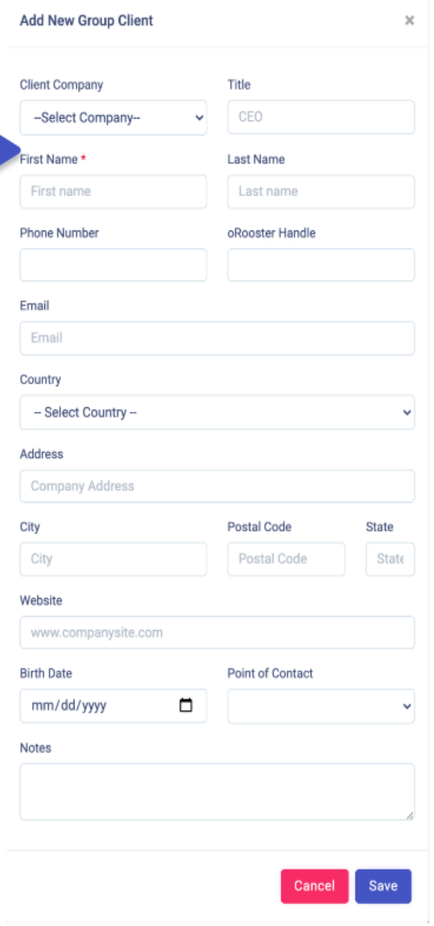
New Company

Tip: Enter the **company first** so it will appear in the drop-down menu for client information.



New Client

Select company from the drop-down list. Then, **enter person** you'd like to add to the group.



Go back Submenu

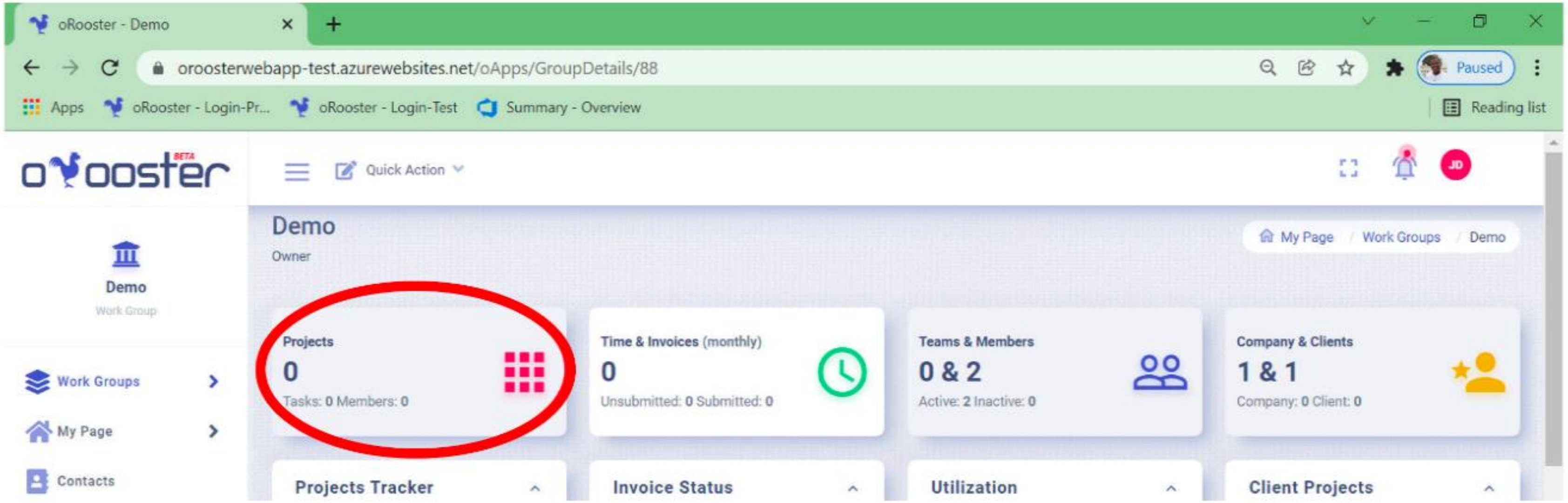
Project Management

Within your work group, you can create a project and then manage all aspects of it.

Go back menu

4a Navigate to Project dashboard

Add a project and keep track of all aspects of the project from people involved, dates, budget, and status! To begin, navigate to a **specific work group**, and the click the "**Projects**" card. Once on the Projects dashboard, click on the "Add Project" button on the top right.

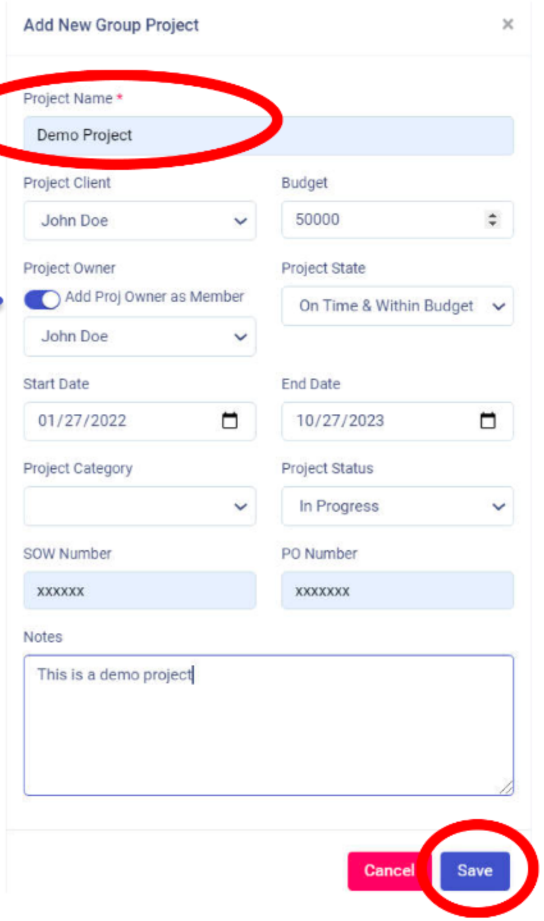


Go back Submenu

4b Enter project details

The only required aspect is to **name*** your project, but from there you can personalize it to fit your needs.

Project Owner toggle must be on (switched to the *right*) for the **Project Client** (i.e. John Doe) to be added in this project. Otherwise, a user can create a project for someone else without having them stay in it.



** Note: Once a project is created, the details can be updated throughout any point of the project by selecting the ellipsis to the left of any project.*

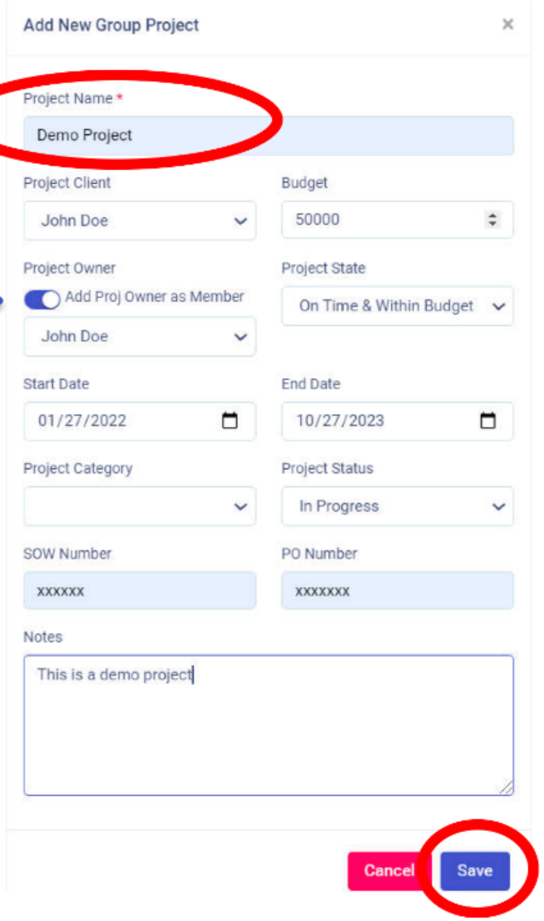
Go back Submenu

4c

Confirmation

Once the project has been created, you can see it on your project's dashboard as shown below.

Once a project is created, the details can be **updated** throughout any point of the project by selecting the **ellipsis** to the left of any project.

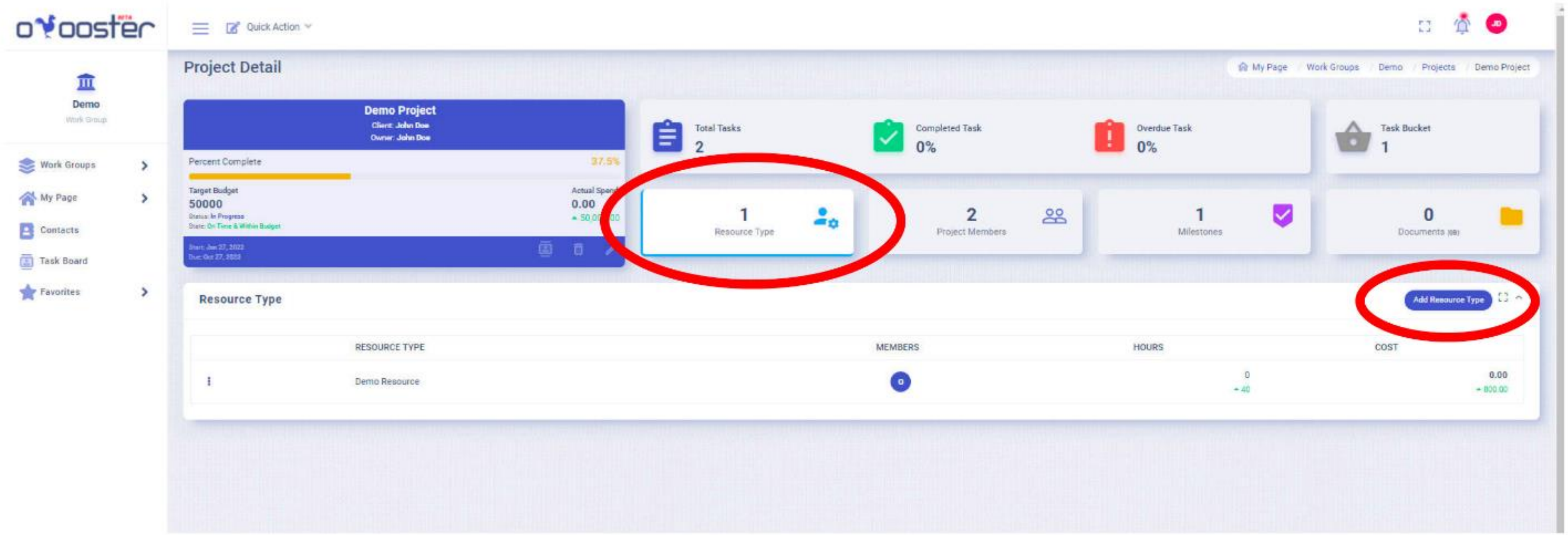


Go back Submenu

4d

Select "Add Resource Type"

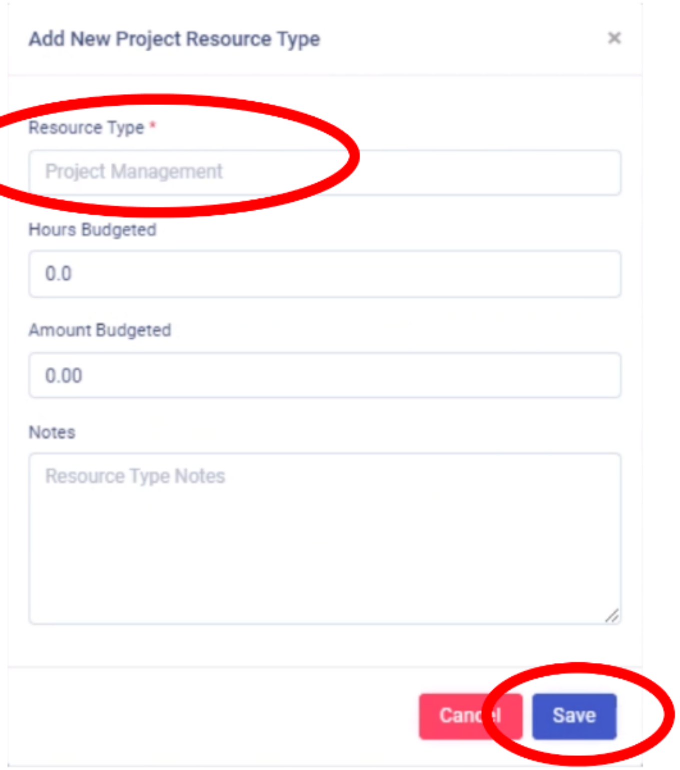
As outlined previously, navigate to the **Project dashboard**, and select a **specific project**. Then, select the "**Resource Type & Milestones**" card, and then click on "**Add Resource Type**".



Go back Submenu

4e Enter project's resource type details

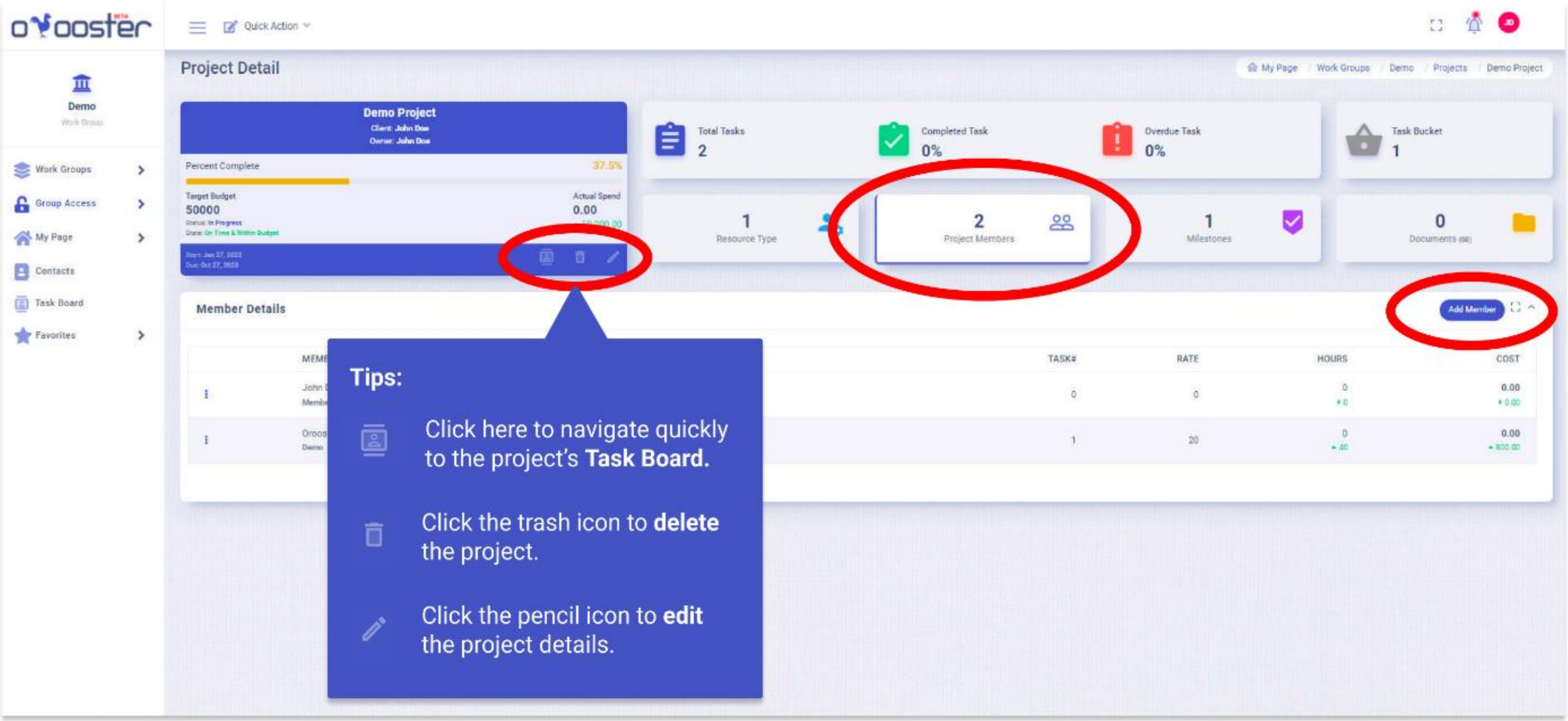
To add a new project resource category, you must enter the **resource type's title**. Option to include the **hours** and **amount budgeted** per resource, as well as any **notes**. Click "**Save**" to add the new project resource type details.



Go back Submenu

4f Add project member

To have a company, you need projects which means you need members to be a part of that project. Navigate to the **Project dashboard** (reference 4a), and select a **specific project.** Then, click the “**Members**” card, and select “**Add Member**”.

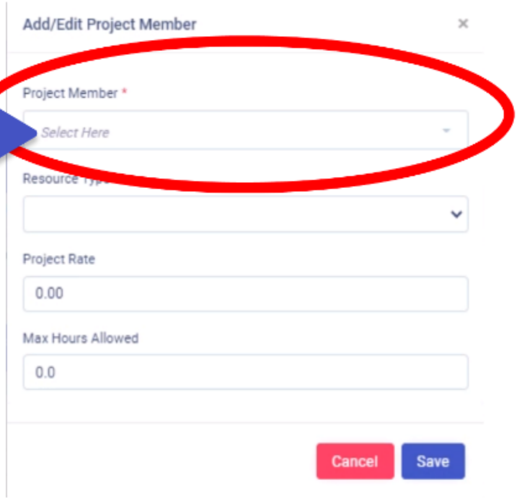


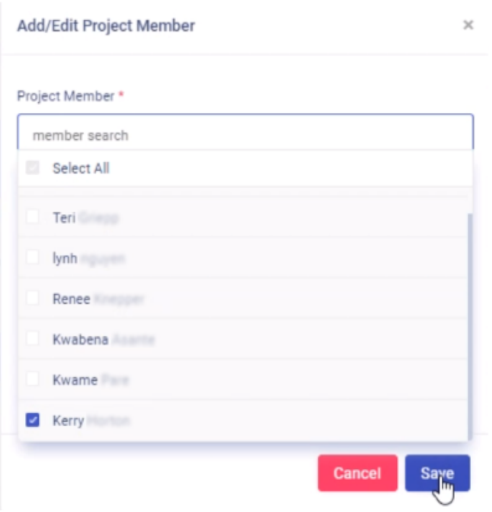
Go back Submenu

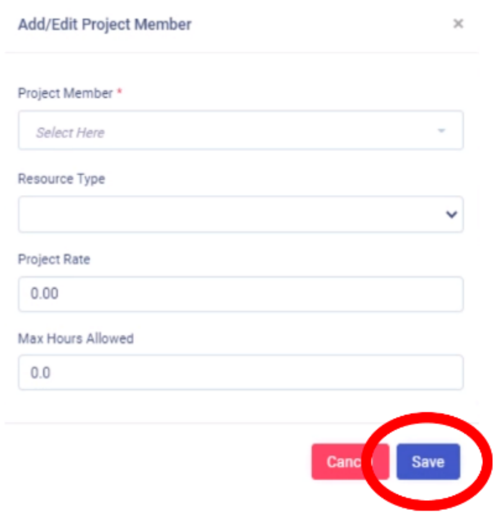
4g Enter member details

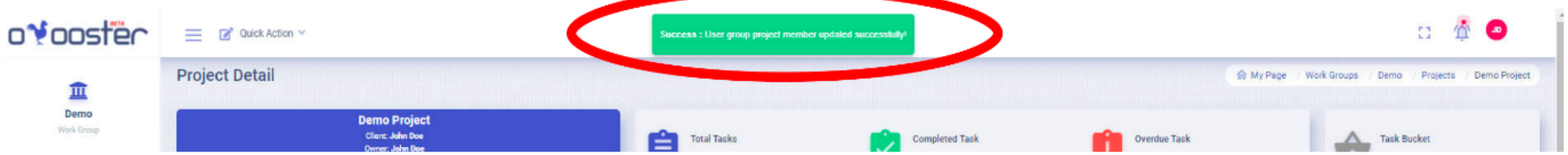
Select from the **drop-down** list which **member** you would like to add. From there you have the option to select their **resource type**, **rate**, and **maximum hours** allowed. Then, click "**Save**" to add or save any edits to the member (you will see a green pop-up at the top of the project dashboard page to show you've successfully added or updated a member to the proect).

A **user must be a member** of the work group to be added to a project.





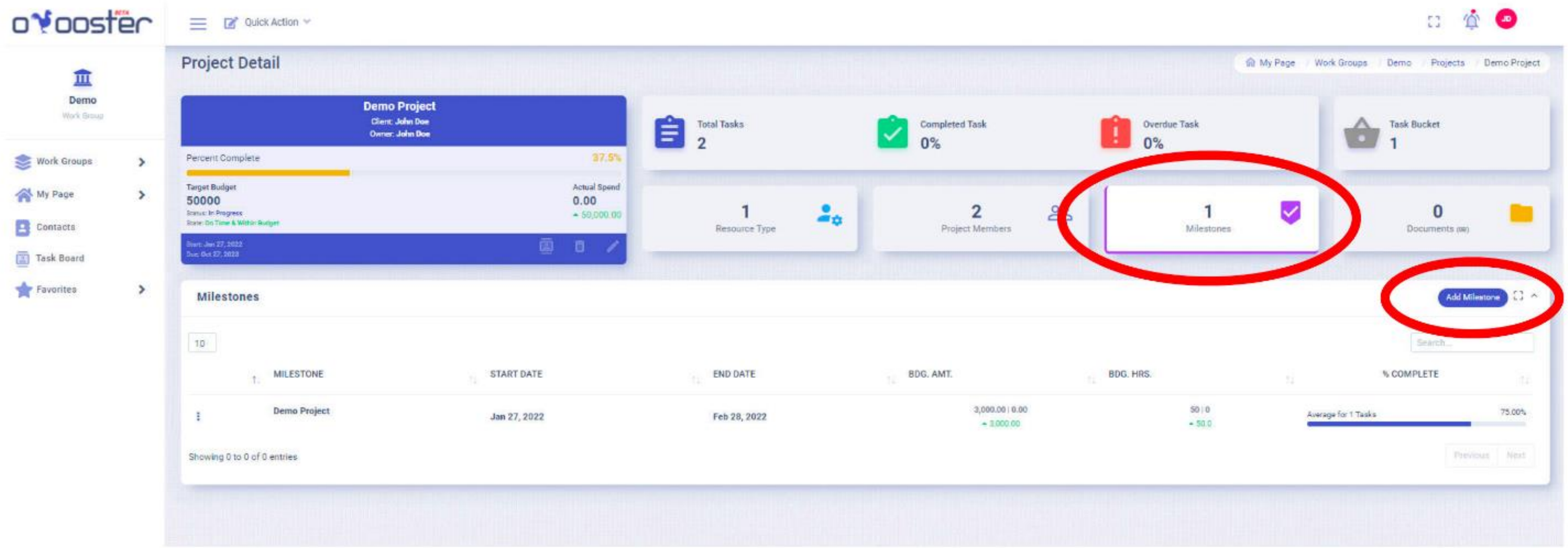




Go back Submenu

4h Select "Add Milestone"

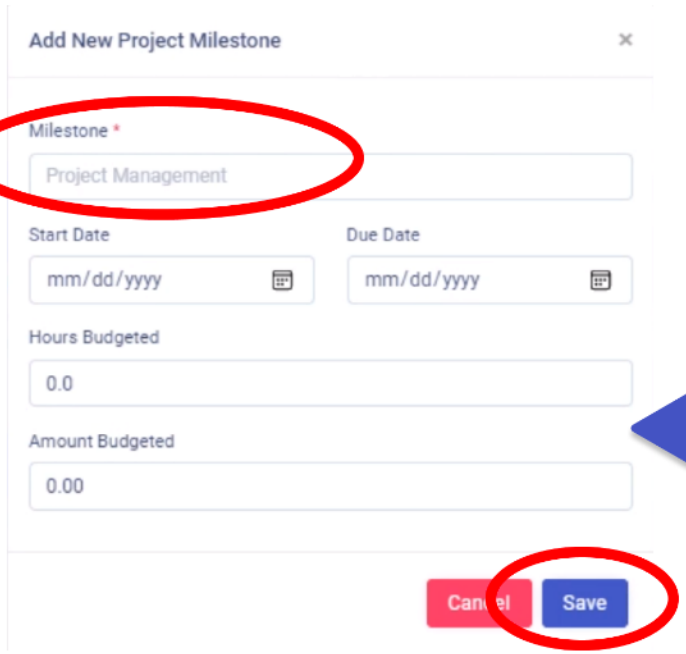
As outlined previously, navigate to the **Project dashboard**, and select a **specific project**. Select the "**Resource Type & Milestones**" card, and then click on "**Add Milestone**".



Go back Submenu

4i Enter milestone details

Creating a milestone – big or small – helps keep projects moving in the right direction. Enter a **title** for the milestone, **date range**, and a **budget for both hours and amount**. Click “**Save**” to add the new project milestone. Now specific tasks can be linked to a milestone to help break up a large project!

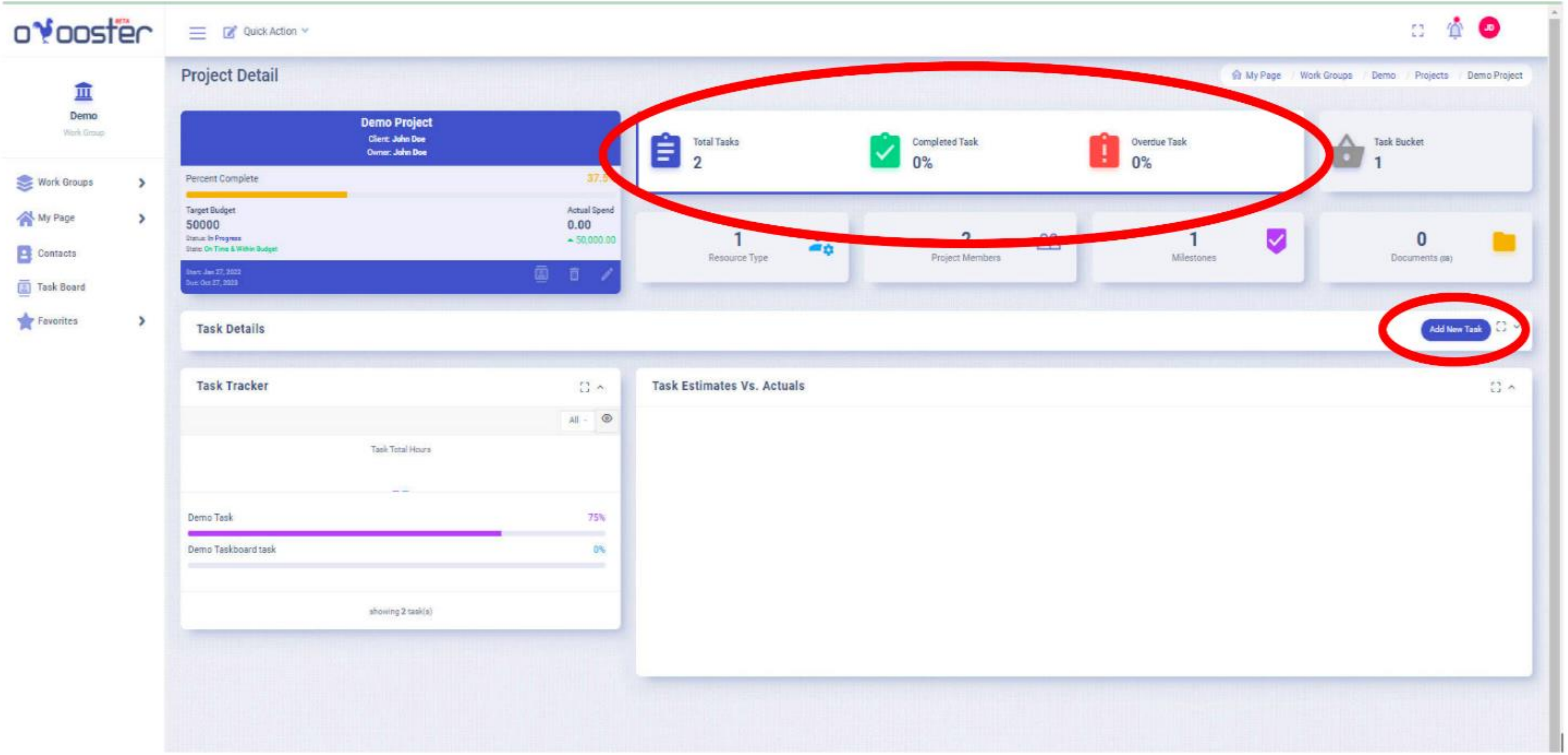


It is best to enter in a rough estimate for hours and amount – it can always be adjusted later.

Go back Submenu

4j Navigate to project tasks

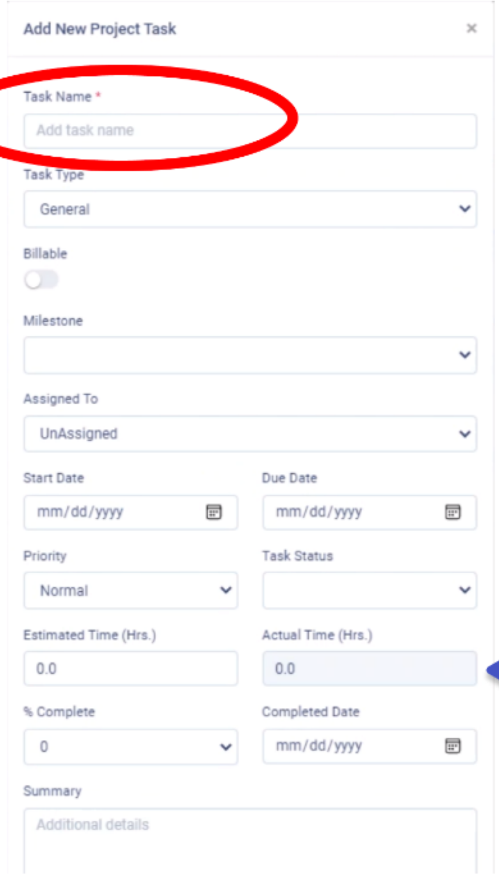
As outlined previously, navigate to the **Project dashboard**, and select a **specific project**. Click on “**Project Tasks – Completed – Overdue**” to view task details. Select “**Add New Task**”.



Go back Submenu

4k Enter task details

Enter the **task name.** Option to indicate the **resource type** or **milestone** that the task is associated with; set the **timeline** of the project, as well as its **priority** and **current status;** and add **extra details** in a text box, or attach files if needed. Scroll down to "**Save**" new project task details.



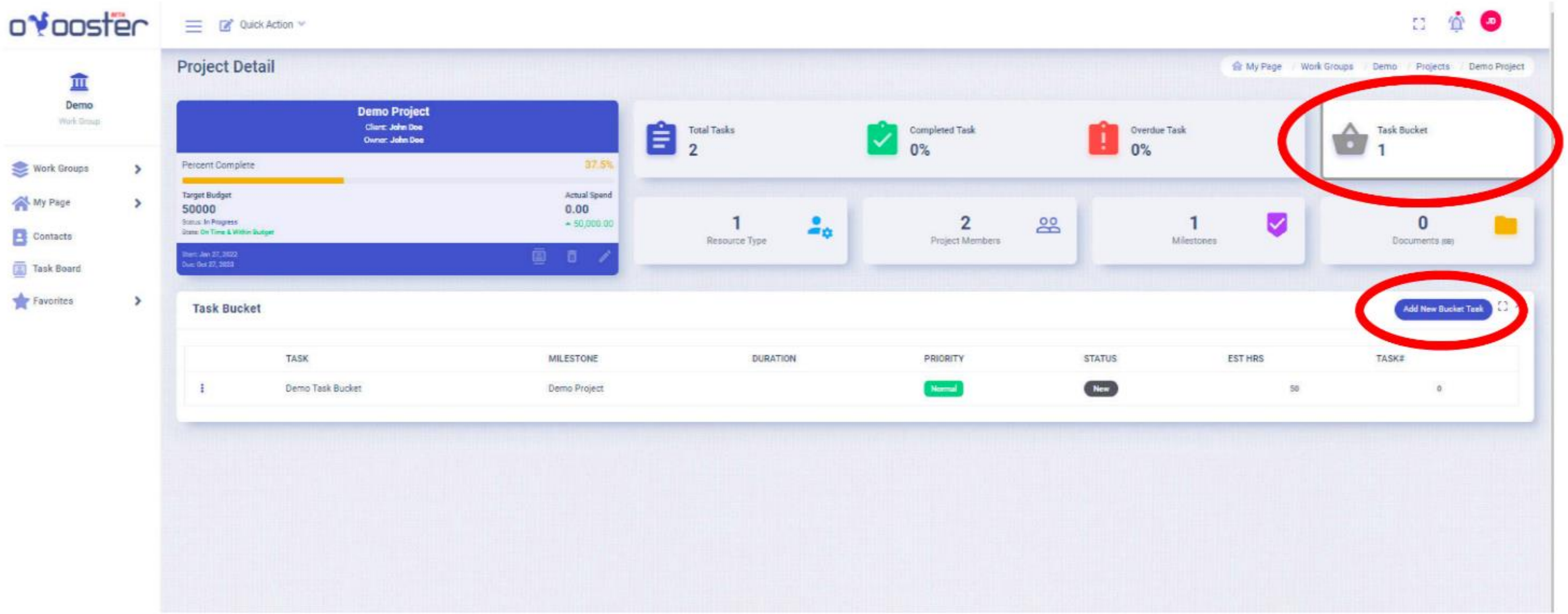
When beginning a project, the time can be **estimated**. Then, the "**Actual Time**" is adjusted as members log time under this task.

Go back Submenu

4l

Select “Task Bucket”

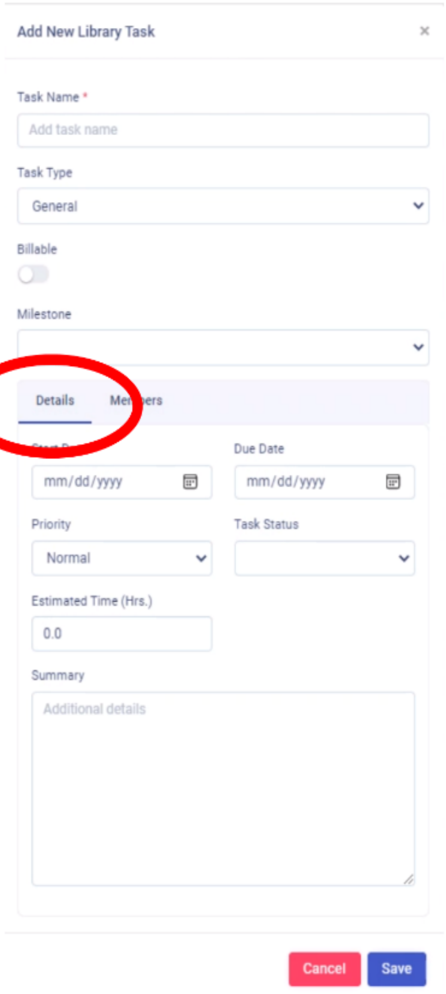
In “Task Bucket” view all the tasks that have been assigned to the given project, and be able to mass assign a task to multiple members within that group. To do this, navigate to the **Project dashboard** (reference 4a), and select a **specific project**. Select the “**Task Bucket**” card, and click on “**Add New Task Bucket**”.

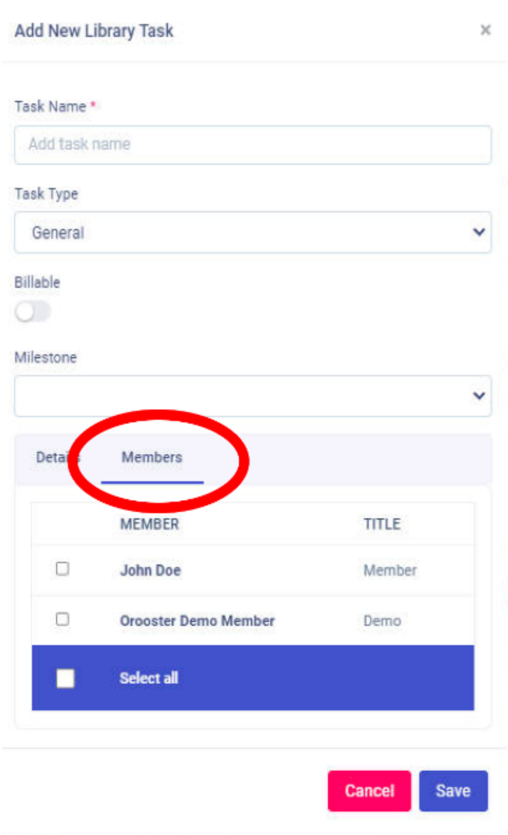


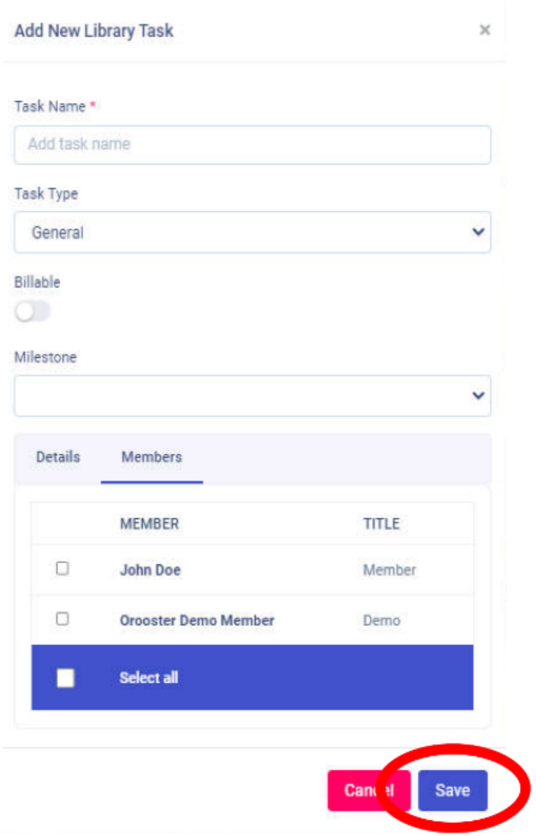
Go back Submenu

4m Enter task bucket details

Enter **Task Name**. Under the **"Details" tab**, you can include the **task type**, if it's **billable** or not, **milestone**, **start/end date**, **priority** status, **task status**, **estimated hours**, and **summary.** Select the **"Members" tab** to easily **add multiple members** to that new task. Click "**Save**" to assign the new task.



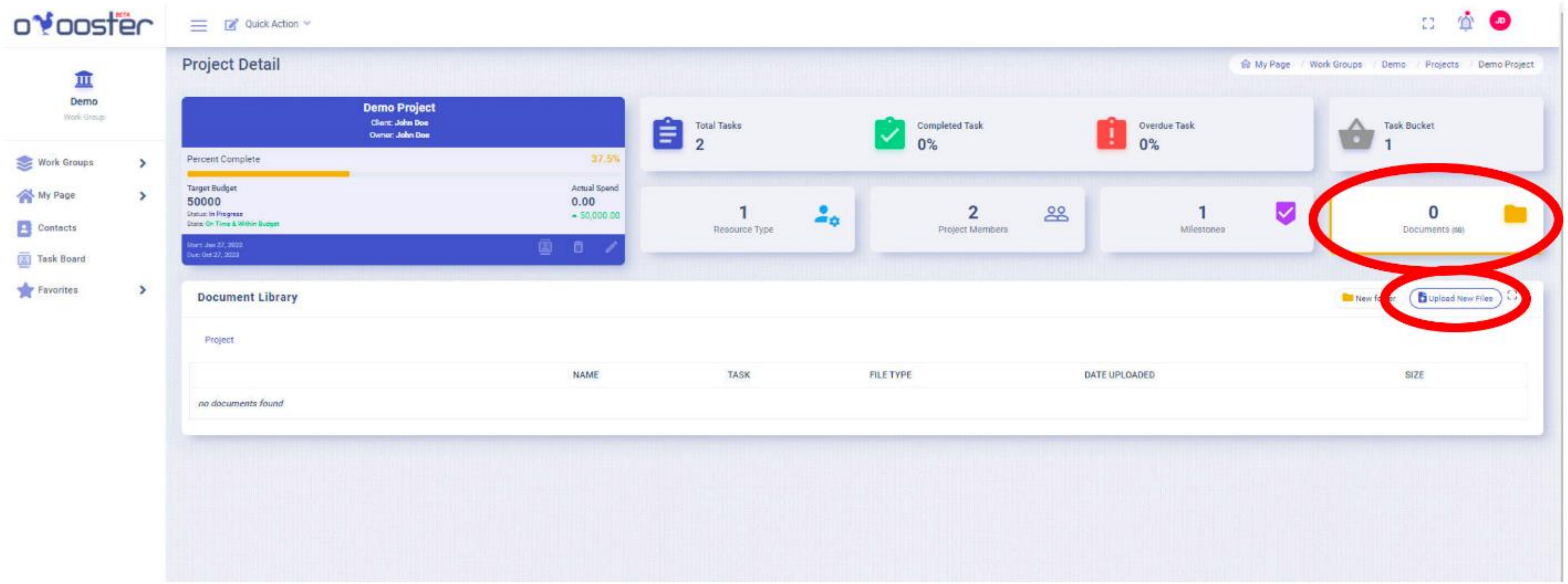




Go back Submenu

4n Select “Add New Files”

As outlined previously, navigate to the **Project dashboard**, and select a **specific project**. Create folders within your library to stay organized. Select the “**Document Library**” card, and click on “**Add New Files**”.

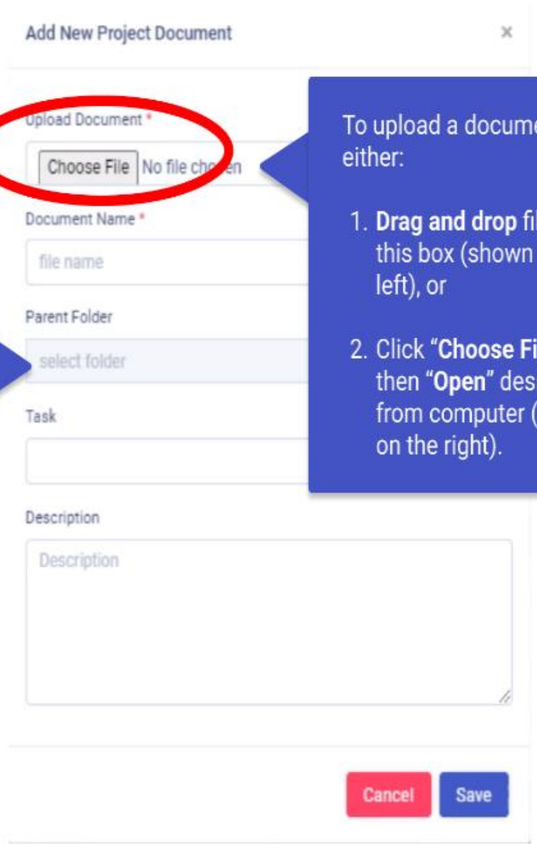


Go back Submenu

4o Enter project's resource type details

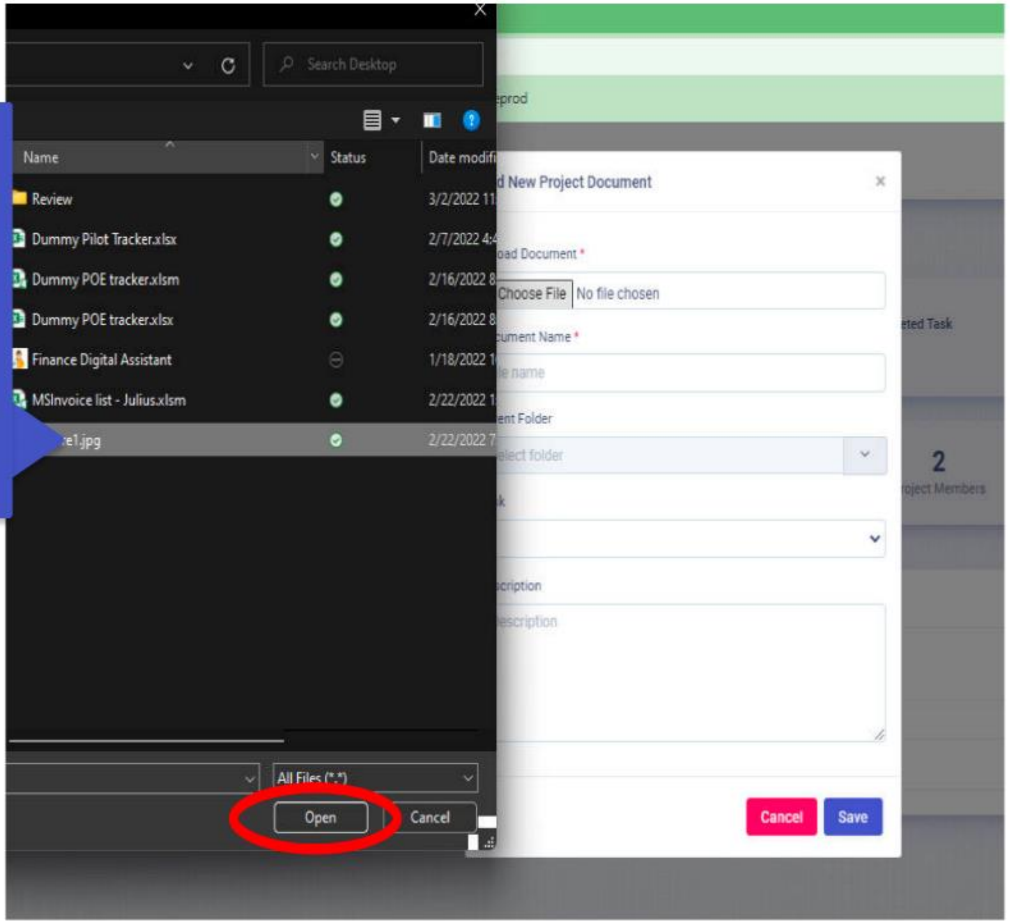
Drag and drop a file, or click on uploading area to select a file from your computer. **Rename** the document, and "**Save**".

For organizational purposes, there's an option to **create parent folders** to add your documents to, and **categorize** these documents **per milestone or task**.



To upload a document, either:

1. **Drag and drop** file into this box (shown on the left), or
2. Click "**Choose File**" and then "**Open**" desired file from computer (shown on the right).



Go back Submenu

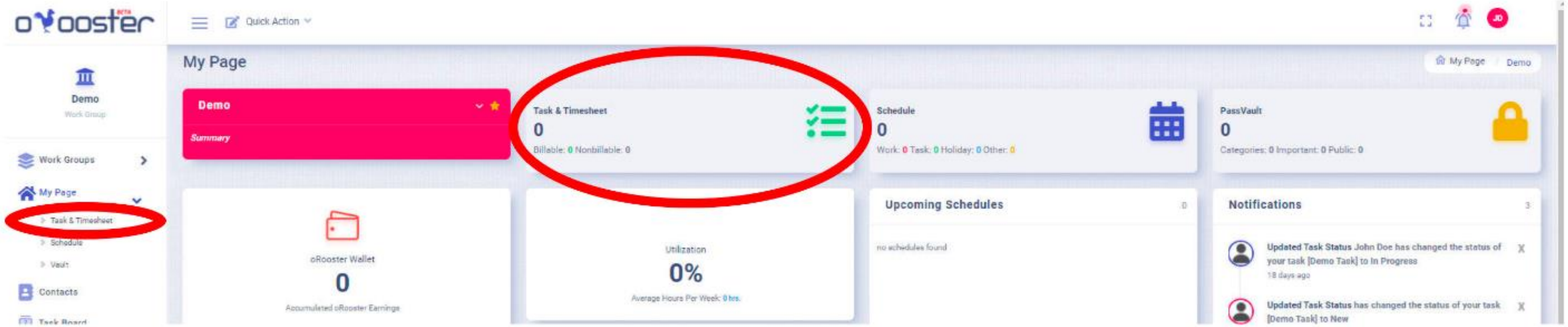
My Page

Access project milestones, Tasks & Timesheet, events, bookmarks, and passwords.

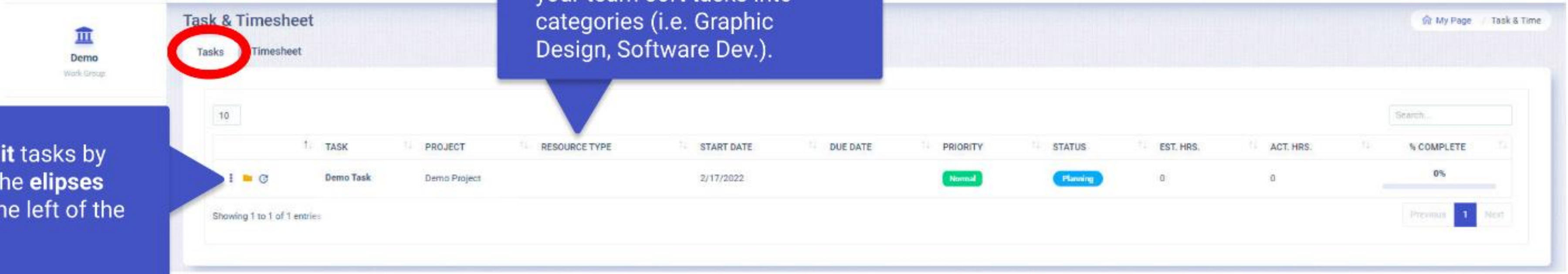
Go back menu

5a View Tasks

Navigate to "**My Page**", make sure you've selected a specific Work Group, click on "**Task and Timesheet**" card, and select "**Tasks**" **tab** to view all your tasks, the project the task is associated with, the group, resource type, milestone, dates, priority, status, estimated hours, actual hours, and percent complete.



Resource Type helps you and your team sort tasks into categories (i.e. Graphic Design, Software Dev.).

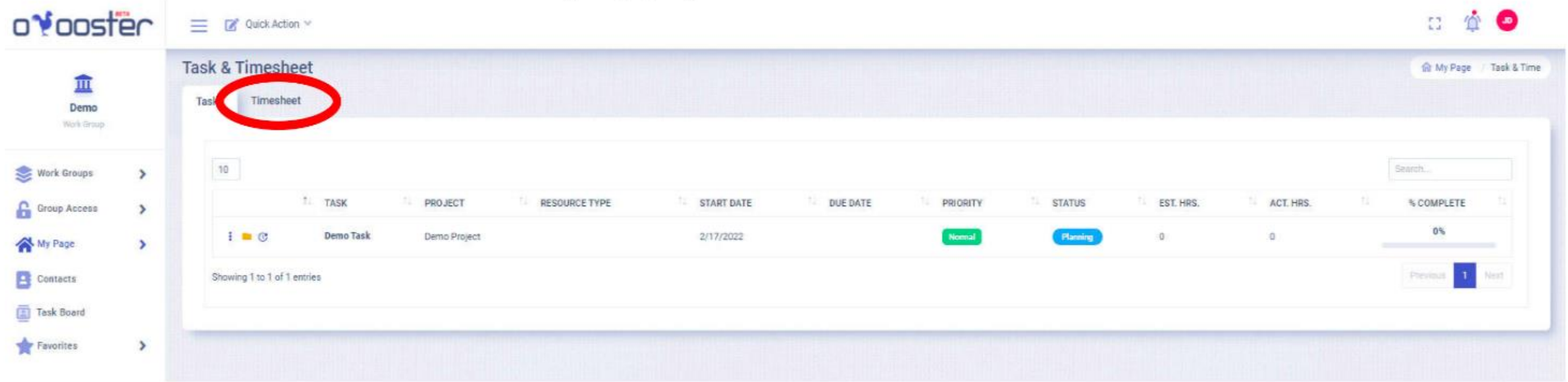


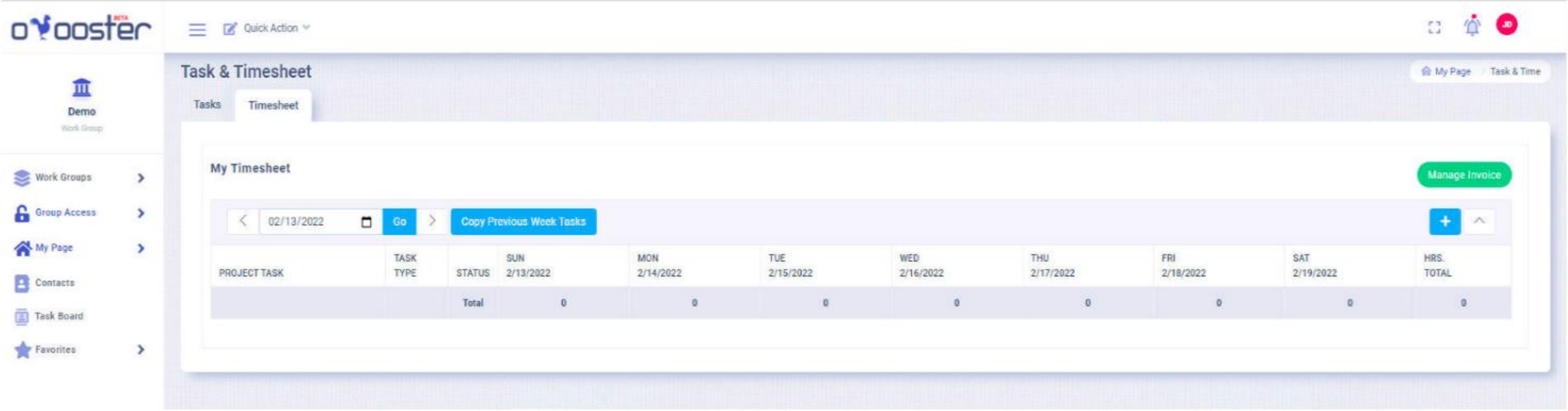
Option to **edit** tasks by clicking on the **elipses** (3 dots) to the left of the task name.

Go back Submenu

5b View Timesheet

Select "**Timesheet**" **tab** to view your timesheet for the selected week, and see your hours broken down by day, project, and task.

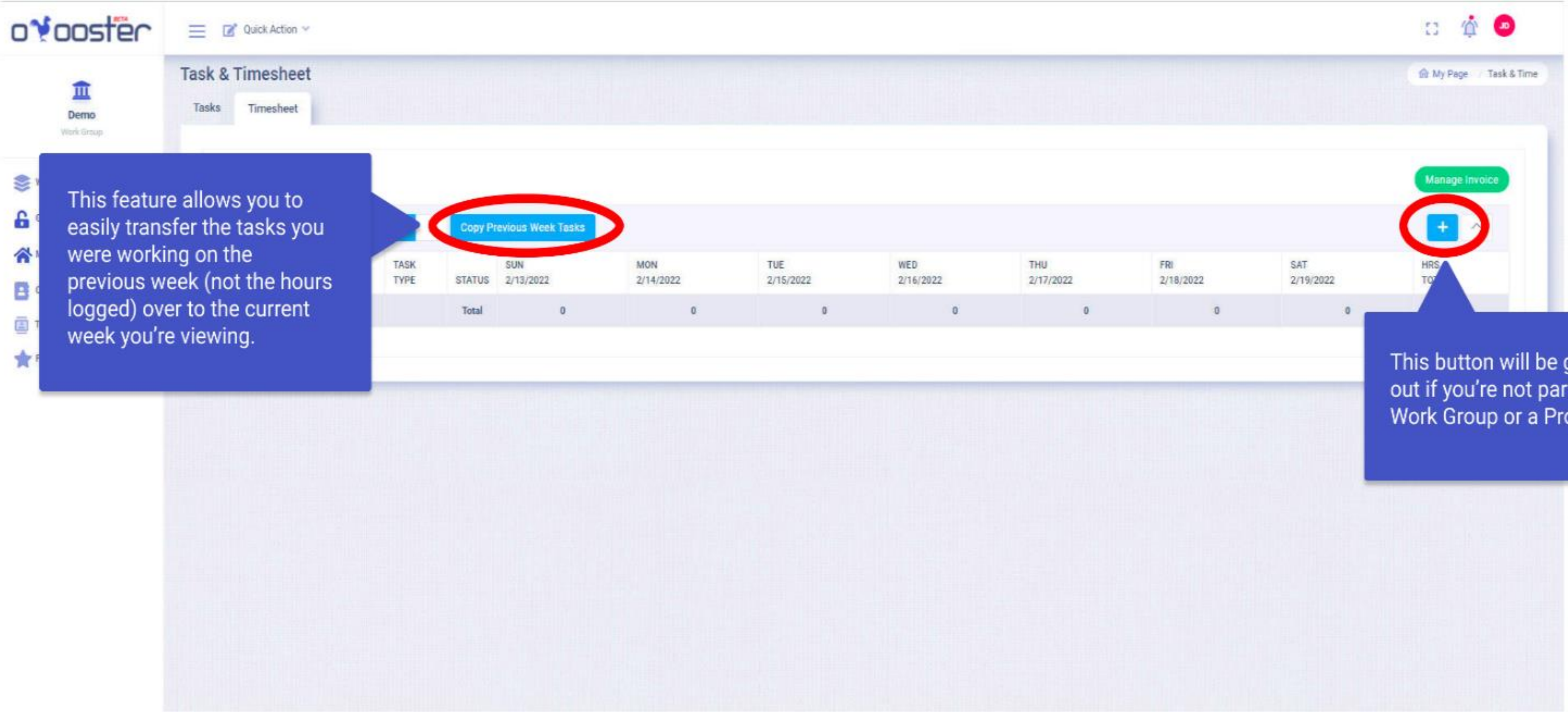




Go back Submenu

5c Add a new time entry

Navigate to "**Task & Timesheet**" and make sure you've selected a Work Group and are on the "**Timesheet**" **tab.** To **add new time entires,** you can either click the 1) **blue "+" button** or 2) "**Copy Previous Week Tasks**".



This feature allows you to easily transfer the tasks you were working on the previous week (not the hours logged) over to the current week you're viewing.

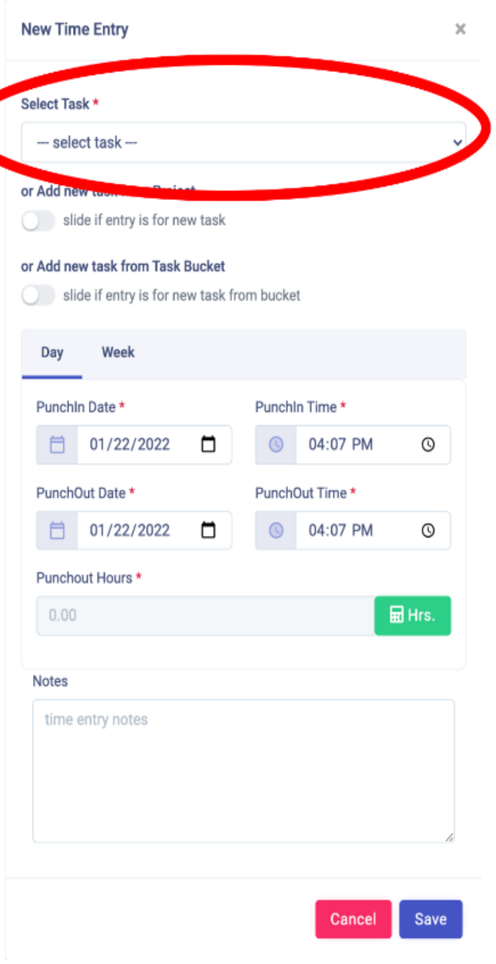
This button will be grayed out if you're not part of a Work Group or a Project.

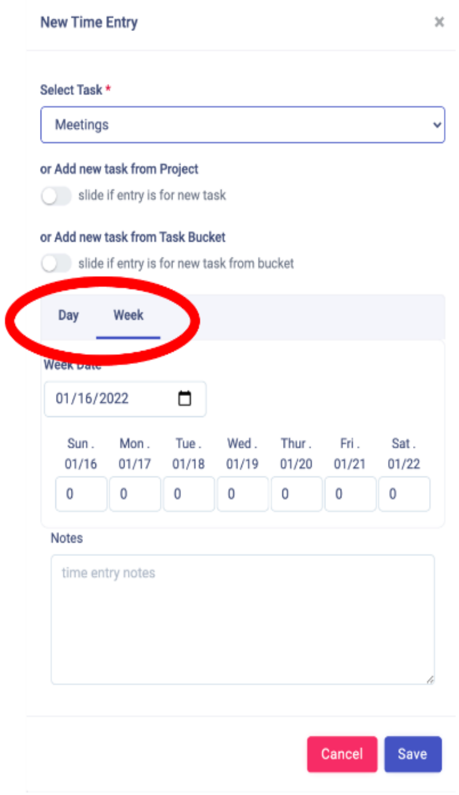
Go back Submenu

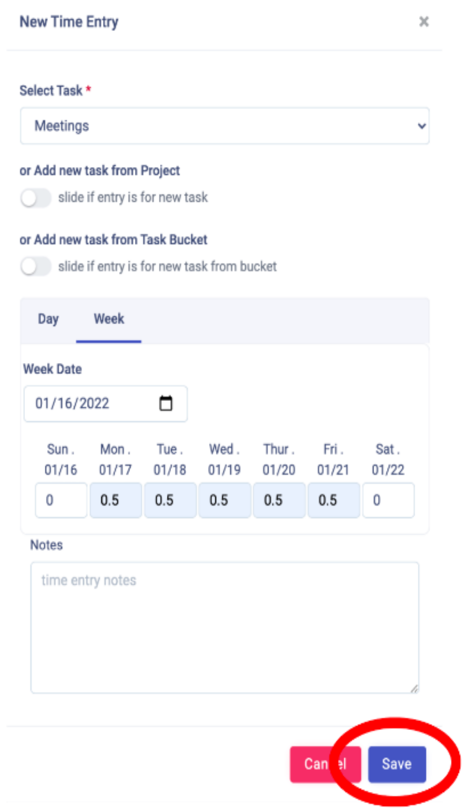
5d

Enter new time entry for existing task

Select an **existing task from the drop-down** list. If you are **making an entry for multiple days**, select the **"Week"** view and enter in a **total** amount of **hours per day**. Otherwise, enter in the **start and end time** under the **"Day" tab** and click **"Save"**.





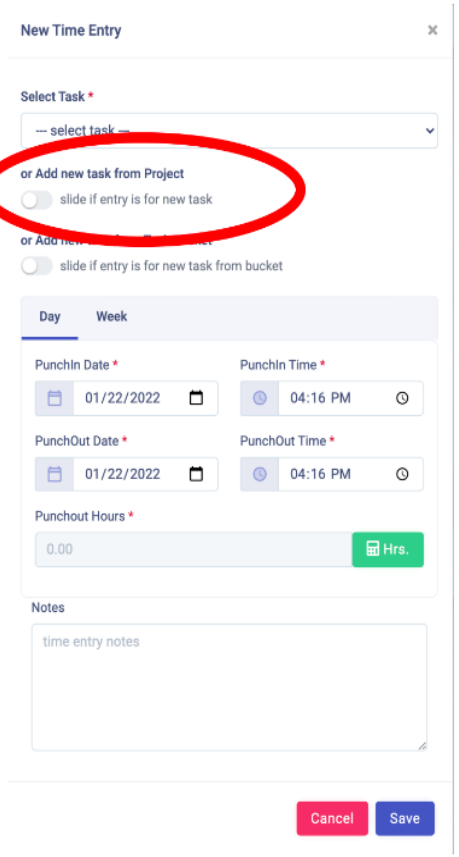


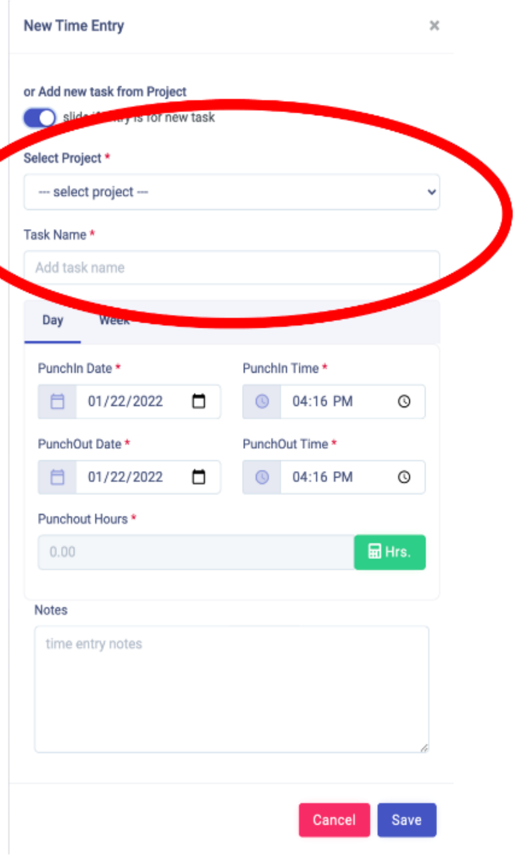
Go back Submenu

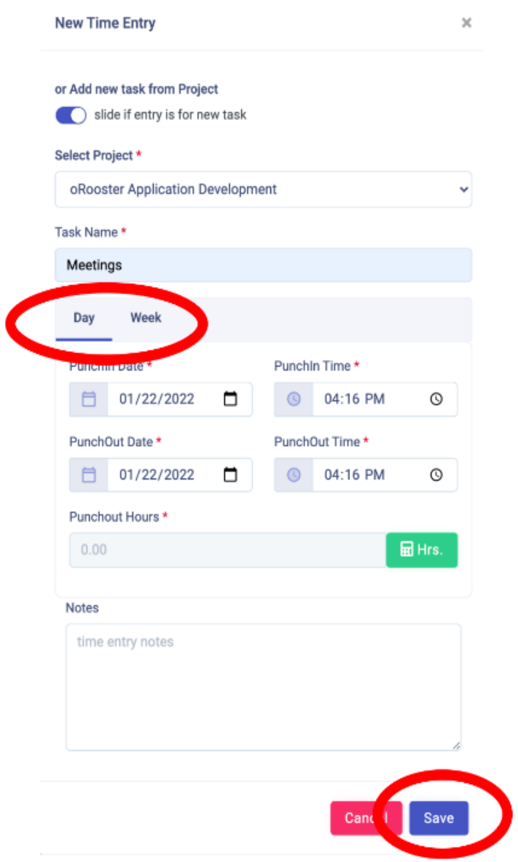
5e

Enter task details

If you are adding time for a task not yet created, click the "**Add new task from project**" toggle. Select from the drop down menu the **project** the task is associated with. Enter the new task's **name**, and like before, enter the **time** under **"Day" or "Week" tab.**



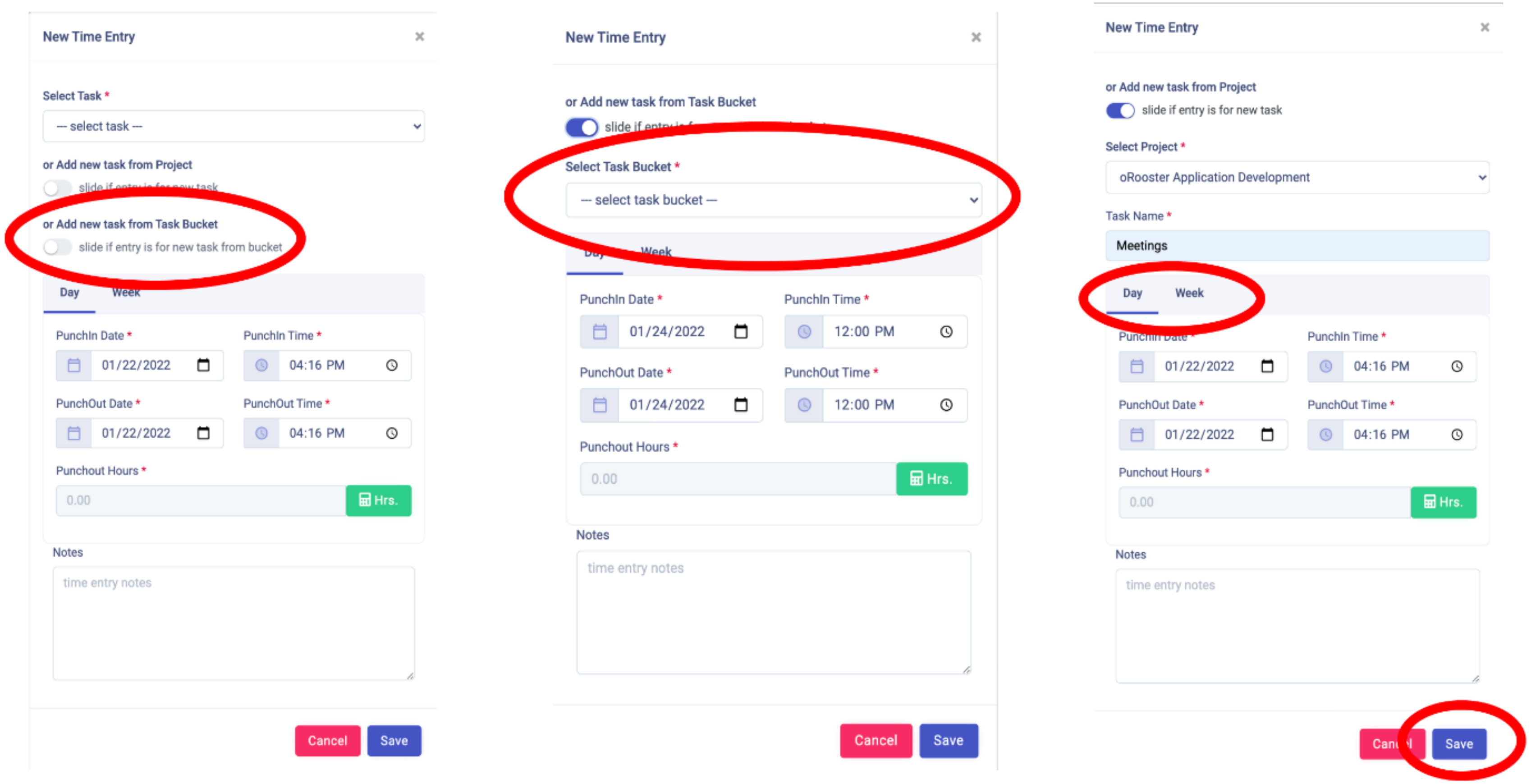




Go back Submenu

5f Enter task details

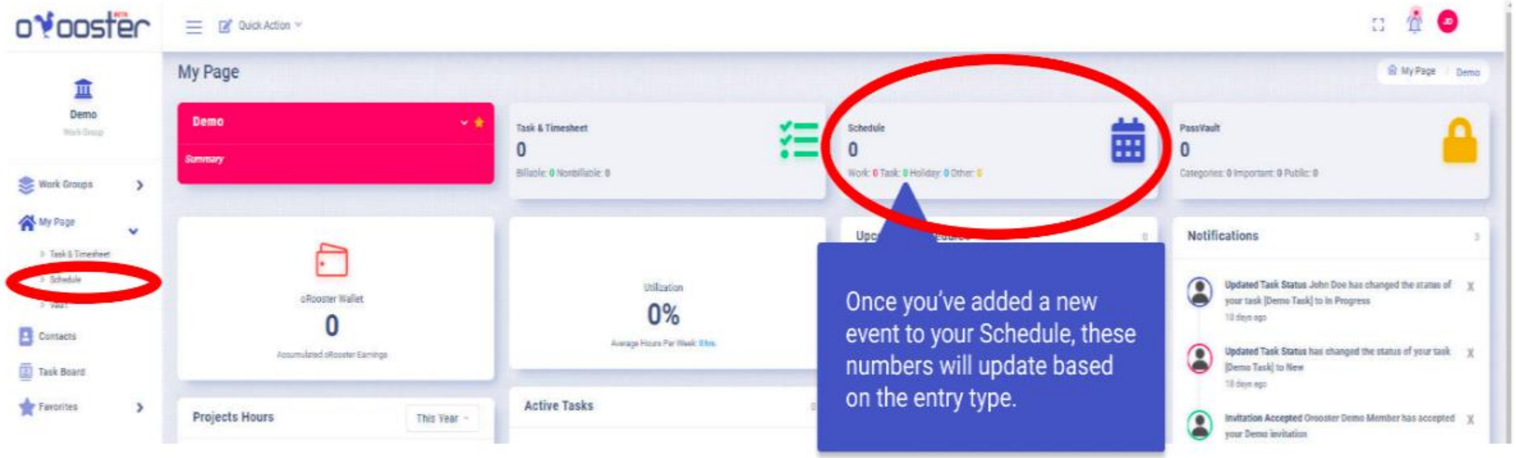
If you are adding time for a task in your Task Bucket for the first time, click the “**Add new task from Task Bucket**” toggle. Select from the drop down menu the **task bucket**. Similar to before, enter the **time** under **“Day” or “Week” tab.**



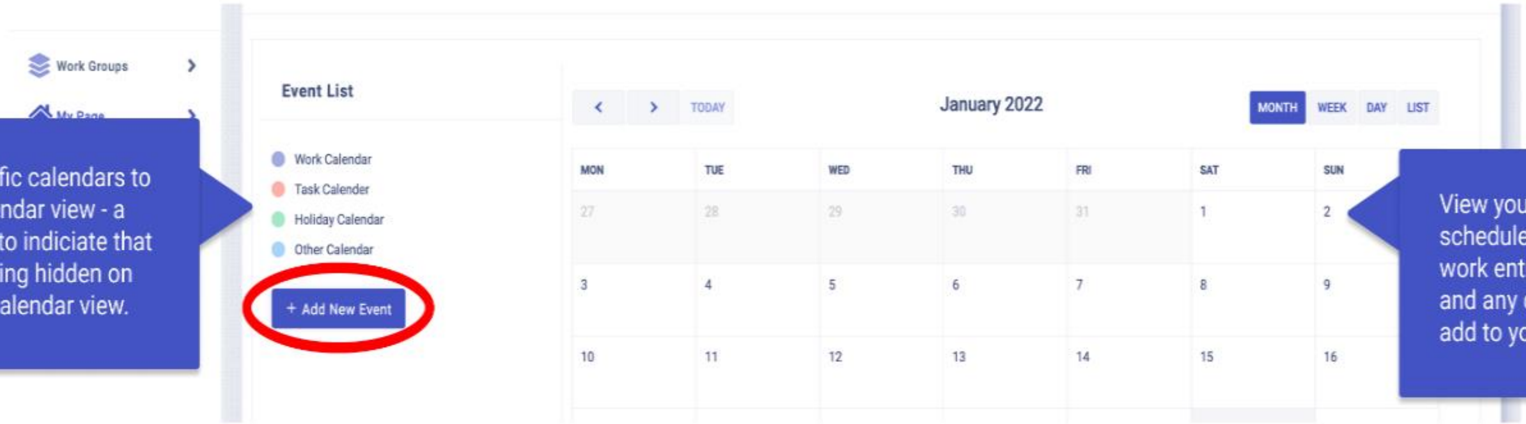
Go back Submenu

5g Navigate to "My Schedule"

Navigate to **"My Page"**, and select **"My Schedule"***. To add a new event to your schedule, click **"+ Add New Event"**.



Once you've added a new event to your Schedule, these numbers will update based on the entry type.



Click on specific calendars to filter your calendar view - a strikethrough to indiciate that calendar is being hidden on your general calendar view.

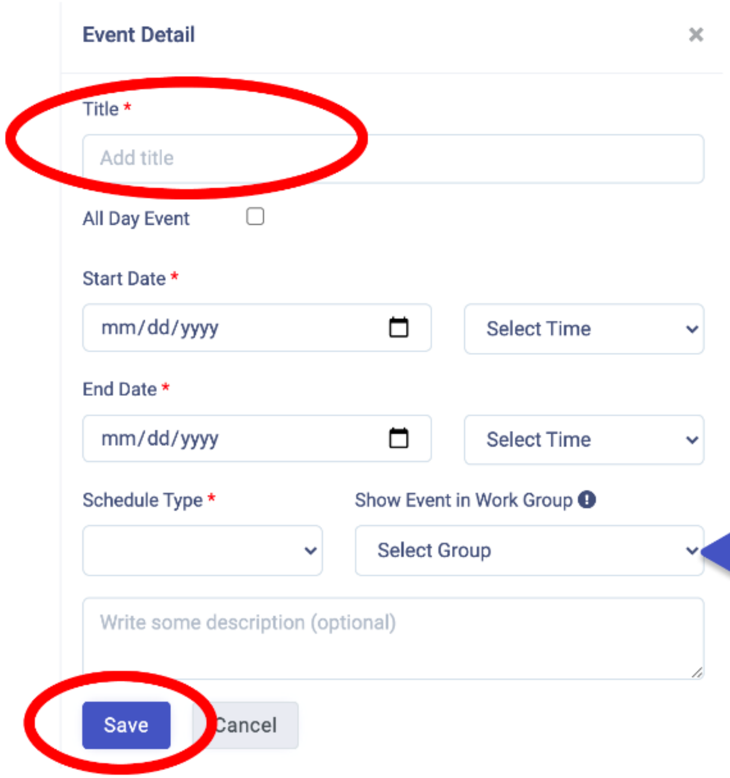
View your color coordinated schedule on the calendar - showing work entries, task entries, holidays, and any other events you want to add to your calendar.

Go back Submenu

5h

Enter event details

Enter the event **title**, **start and end date**, and the **schedule type** (determines what color the event will display as). Option to enter time details and the work group.



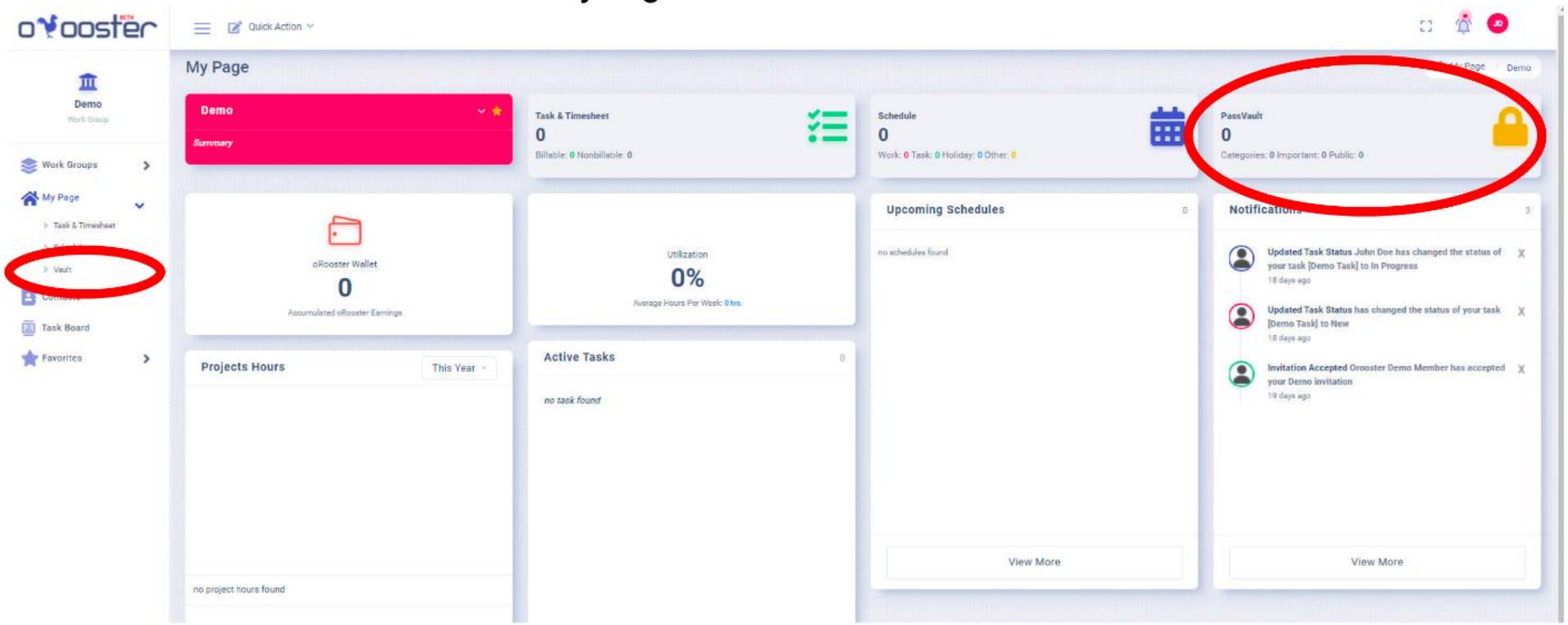
Select a specific Work Group to show on **all calendars** to **all members.**

Go back Submenu

5i

Navigate to "PassVault"

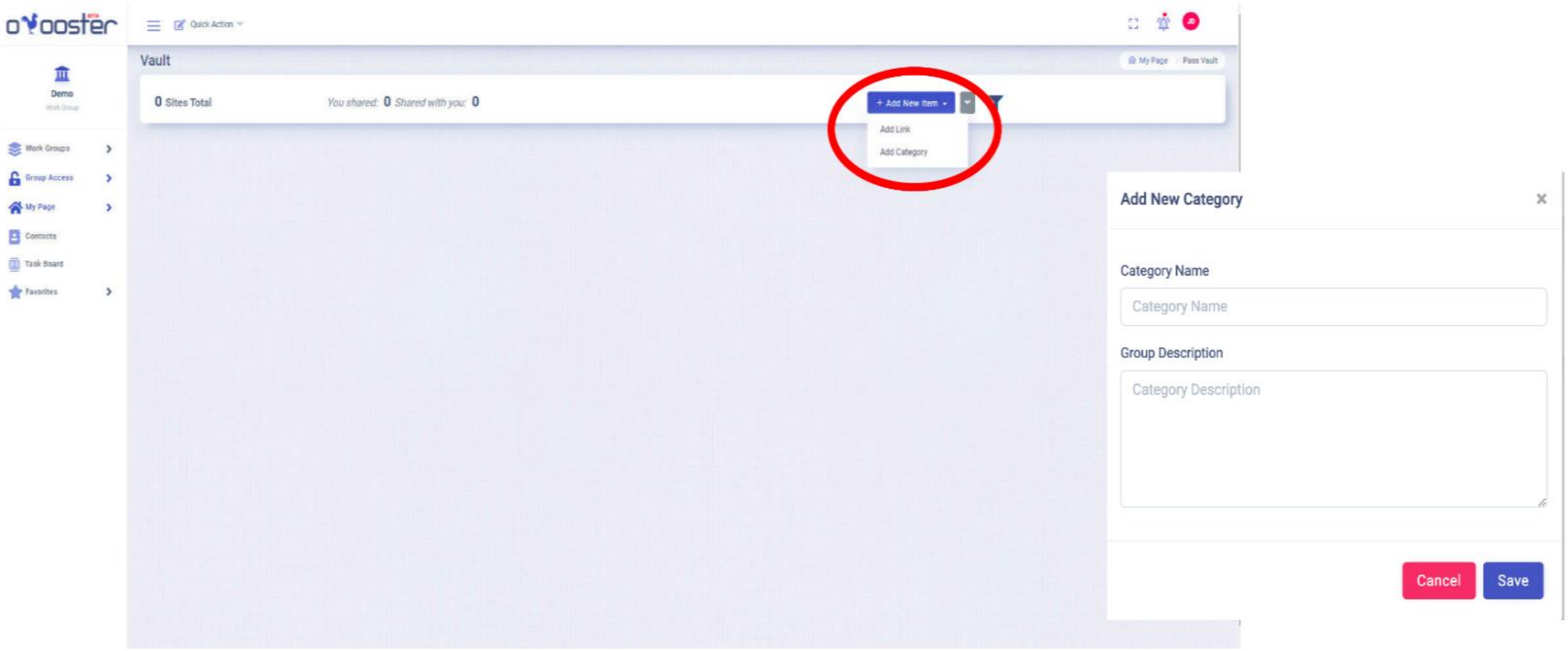
Vault allows you to bookmark websites and securely save passwords with the ability to invite others to view this information. Access PassVault by selecting "**PassVault**" on the **left navigation menu, or** from the **top right card on "My Page".**



Go back Submenu

5j Add new category

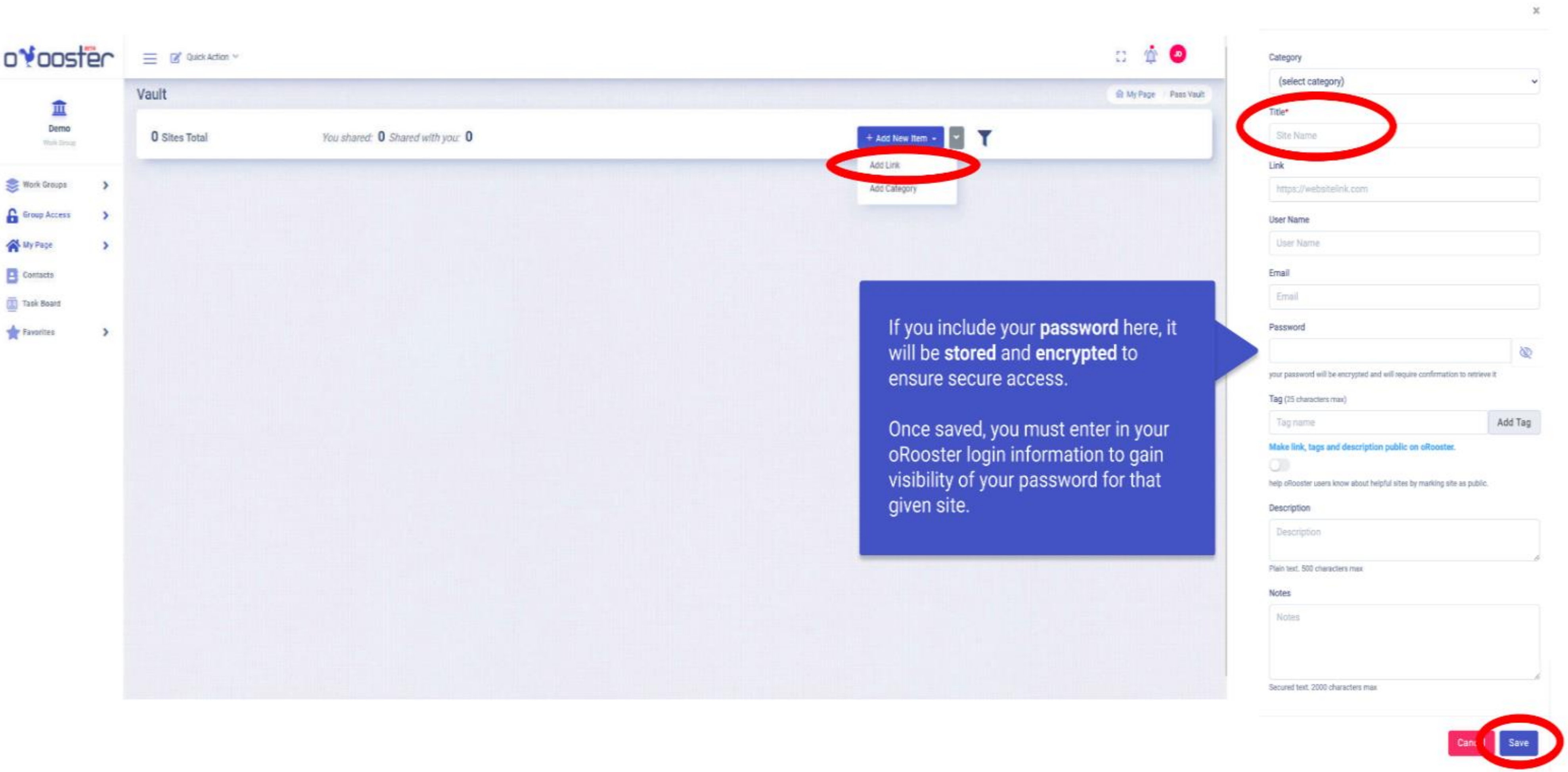
Adding categories is simple and optional - categories allows you to filter sites in Vault and find the site you are looking for in the most efficient way. To add a new category, click on the blue "**Add New Item**" button, and select "**Add Category**". Enter new category's **name** and write a brief description.



Go back Submenu

5k Add new site

To add a new web link (and password if you'd like to*), click the blue "**Add New Item**" button, select "**Add Link**", and enter **details**.

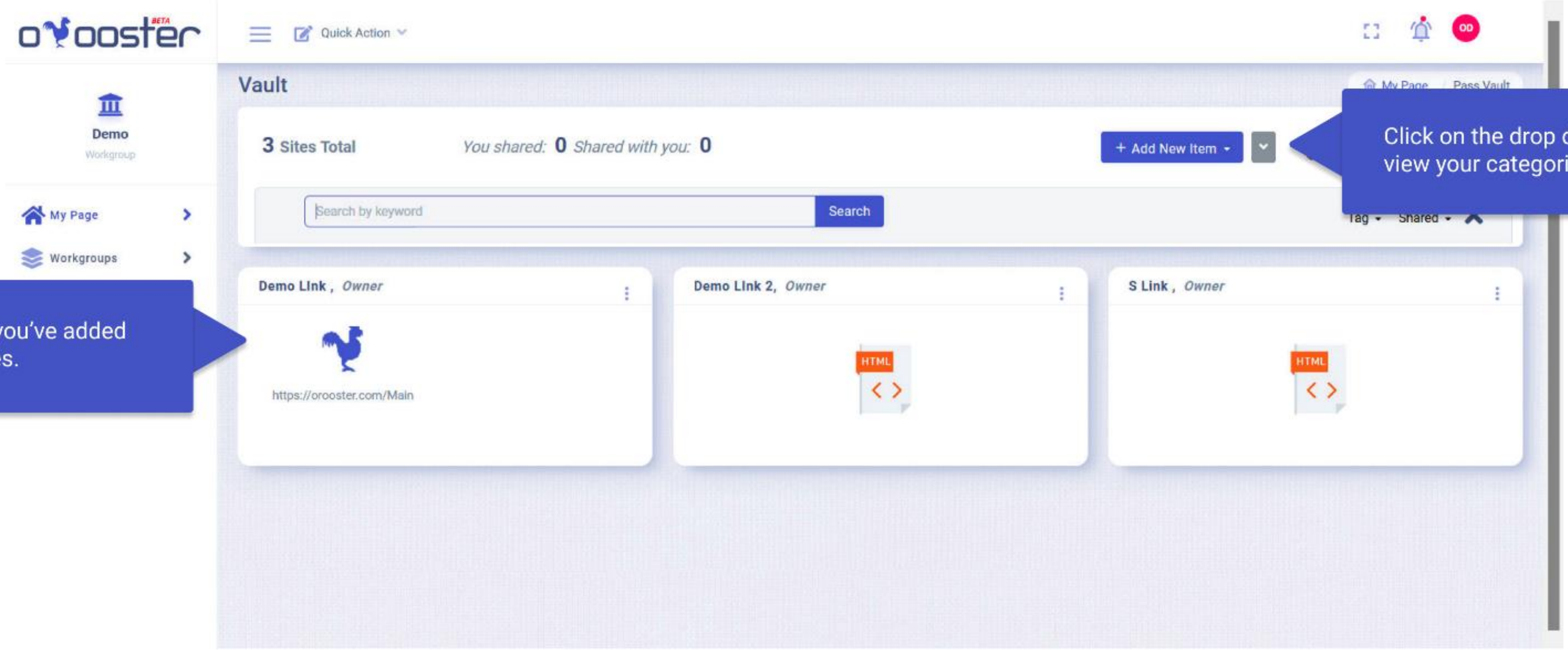


Go back Submenu

5l

Confirmation

Once you've added a new item to Vault, you should see it appear on the page.



Click on the drop down arrow to view your categories.

View the sites you've added here as modules.

Go back Submenu

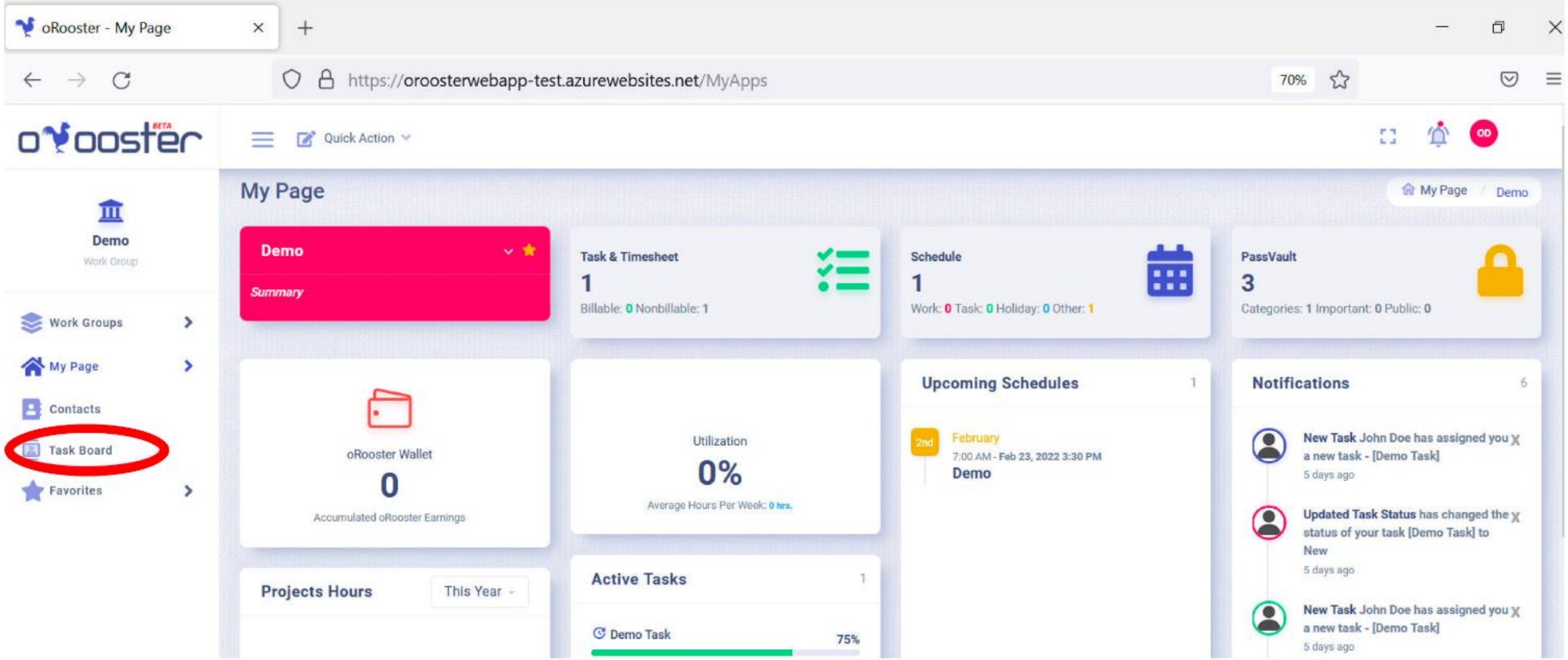
Task Board

Manage a project's progress, and assign task items to project members.

Go back menu

6a Navigate to Task Board

Navigate to “**My Page**”, and select “**Task Board**” on the far left navigation menu.

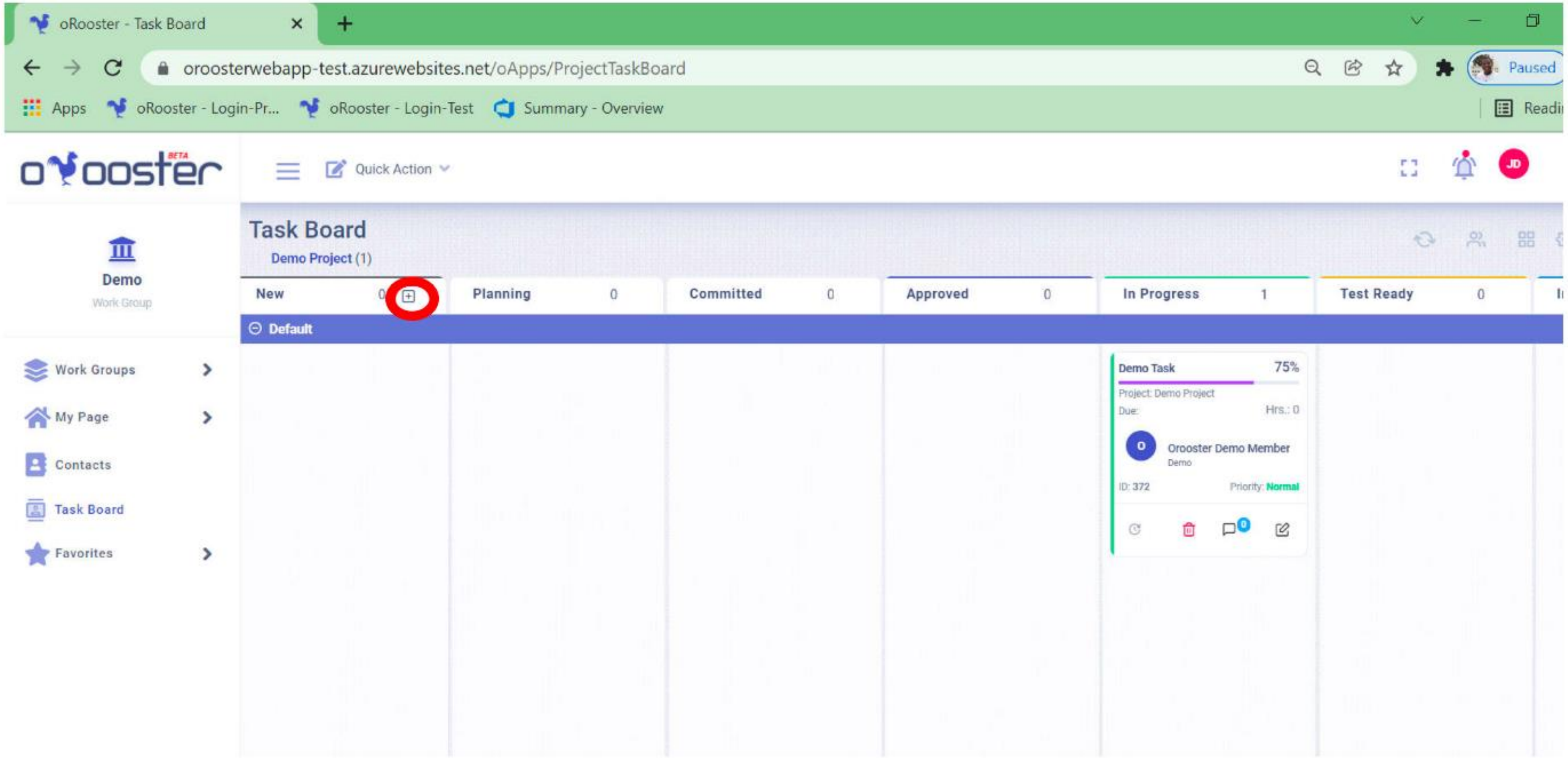


Go back Submenu

6b

Add New Item

To add a new task board item, click on "**+**" button on the top right of the "**New**" column. Same as creating a new task just in a different spot/view



Go back Submenu

Task Board

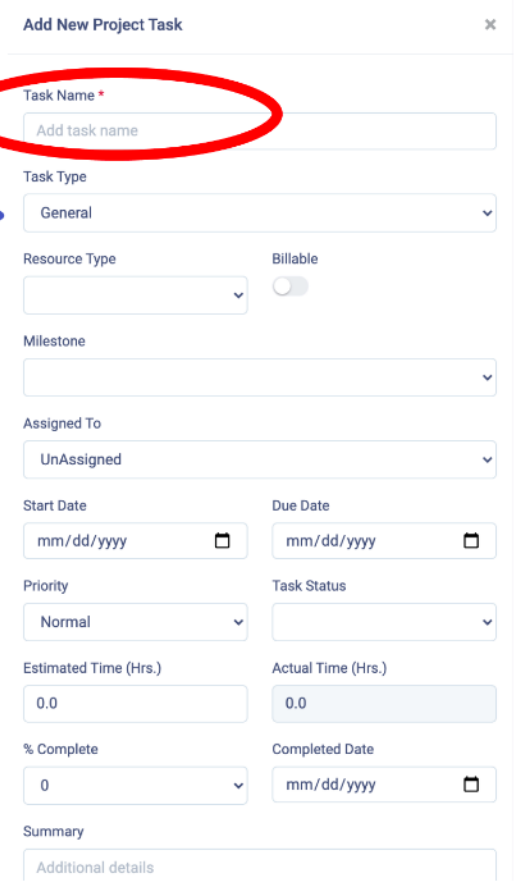
Create New Item

6c

Enter details

Must enter “**Task Name**”. Option to assign the item to a team member by clicking on the drop down menu of the “**Assigned To**” box and selecting the member from the work group list. To create new item, scroll down and click “**Save**”.

What’s unique about adding a task through the Task Board, is that someone with task board organizer capability, can assign it a **Task Type** (a swimlane).

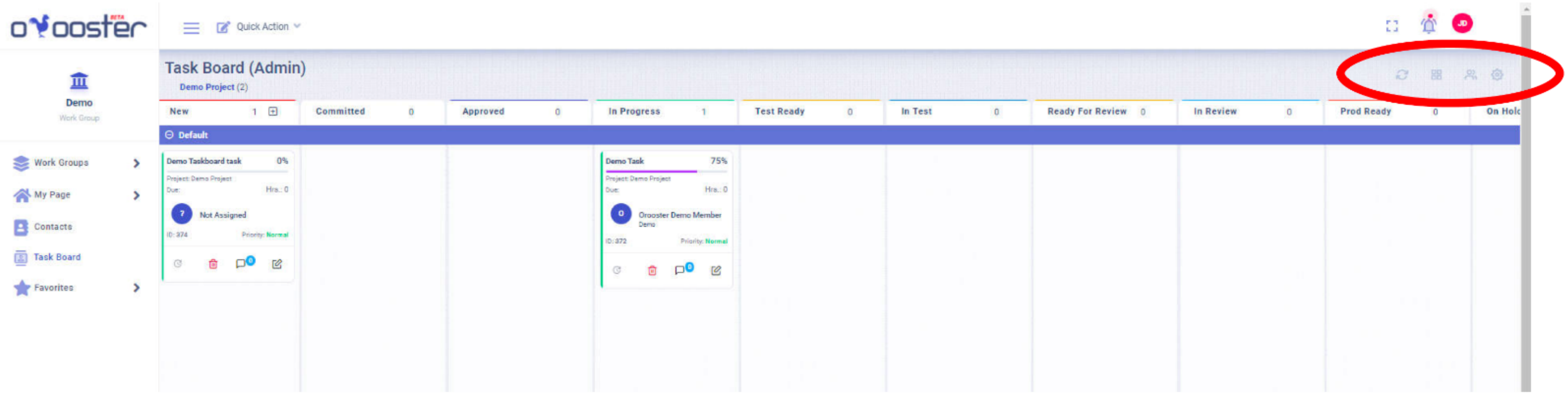


Go back Submenu

6d

Navigate to filter

Option to turn on **Auto Update**, filter the task board by **group members** and/or **work group**, and also change your **settings**.

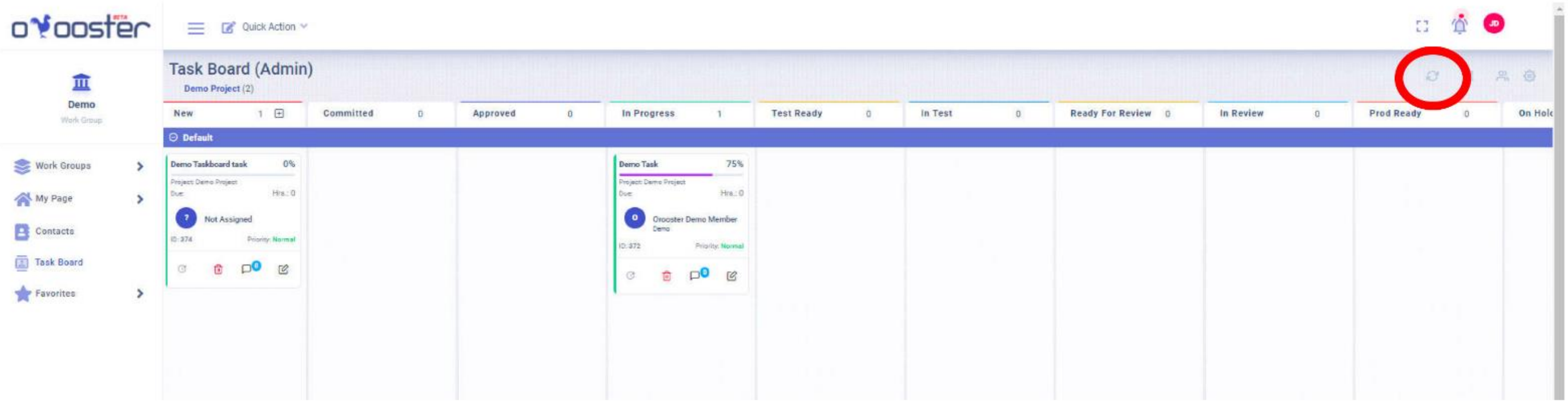


Go back Submenu

6e

Auto Update

The icon on the **far left**, is the **Auto Update** feature. Here, you can click the icon to turn it on/off. If it's **on**, the icon will **spin** and it will **automatically refresh** your board to show any new updates on items from other users. If it's **off**, the icon will be **static** and the **changes you make** will only be **visible to you** - you will have to **manually refresh** the page to see others' changes.

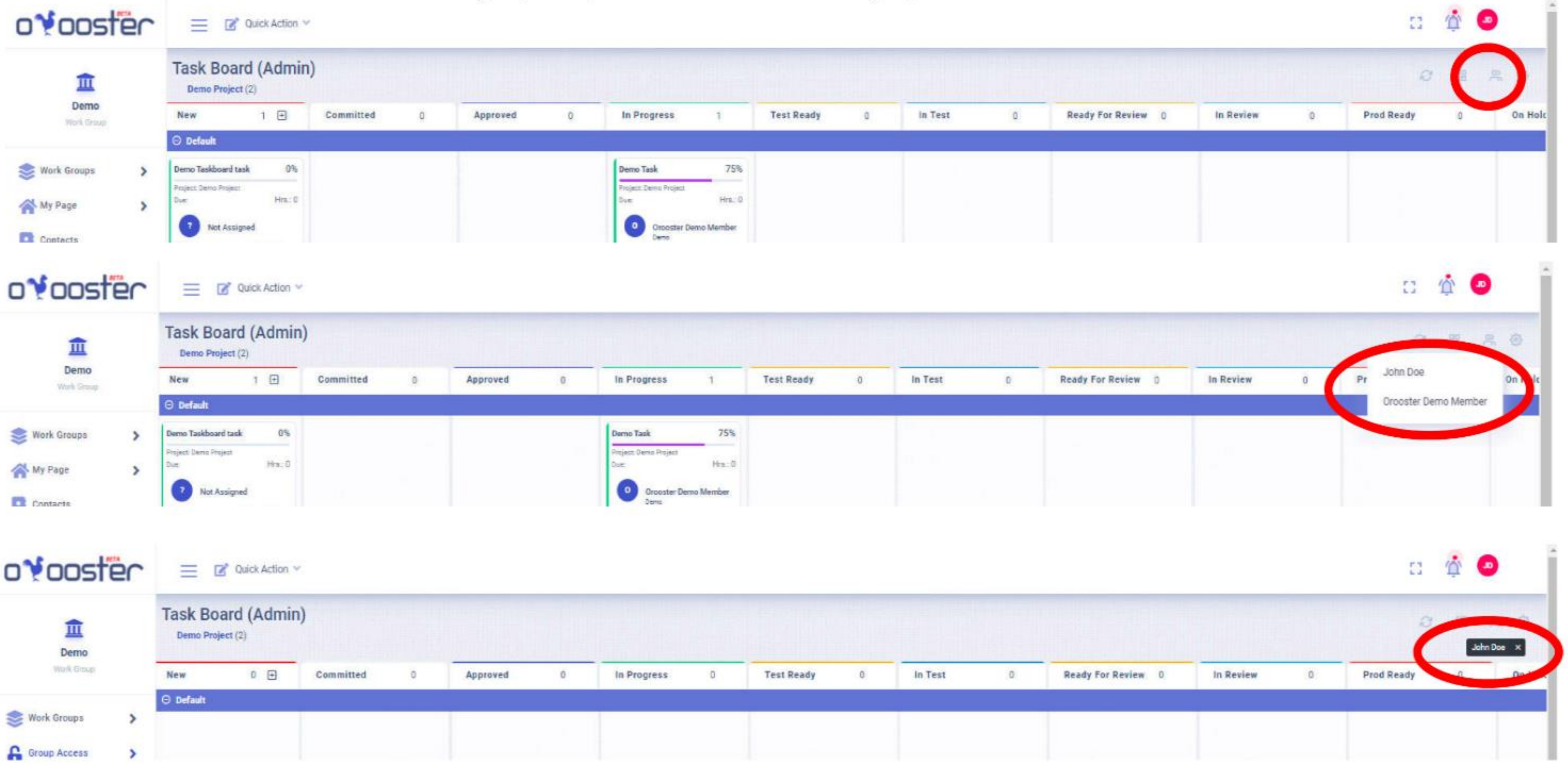


Go back Submenu

6f

Filter by member

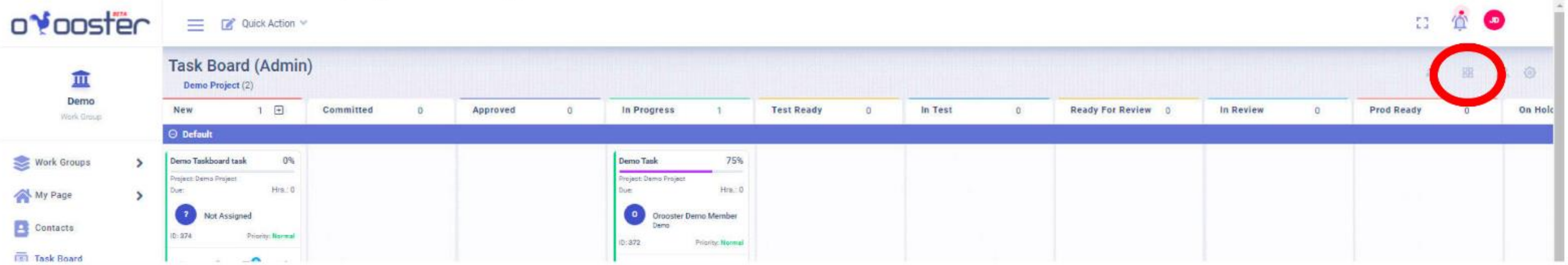
The icon on the **second to the left**, is the **filter by member** feature. Click the icon to see a **drop down** list of all the specific work group members. Select a member to see which task board items they've been assigned to (you will see the selected member appear in a dark **grey box**). Click the "**X**" on the grey box to **clear** the filter.



Go back Submenu

6g Filter by group

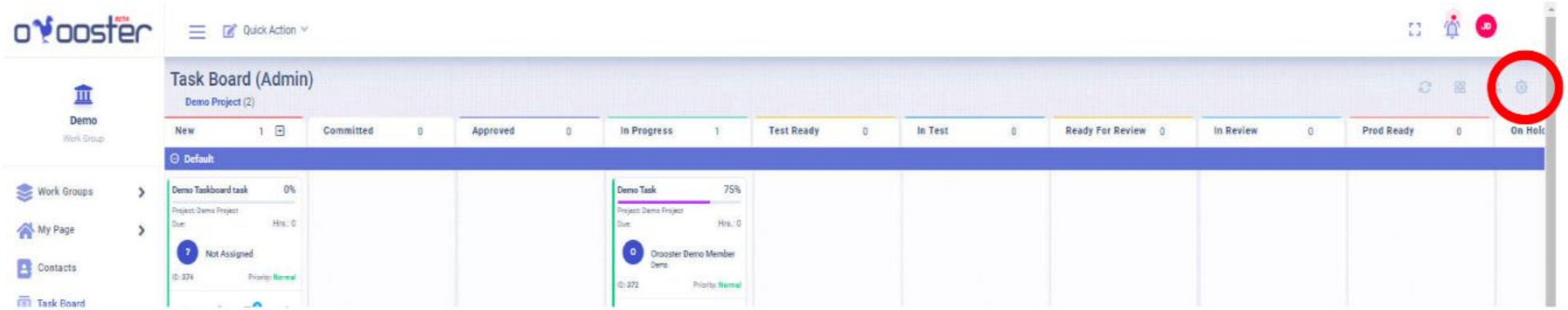
The icon on the **second to the right**, is the **filter by work group** feature. Click the icon to see a **drop down** list of all your Work Groups. Select a group to see which task board items are associated with it (you will see the selected group appear in **blue text** below the "Task Board" page heading).

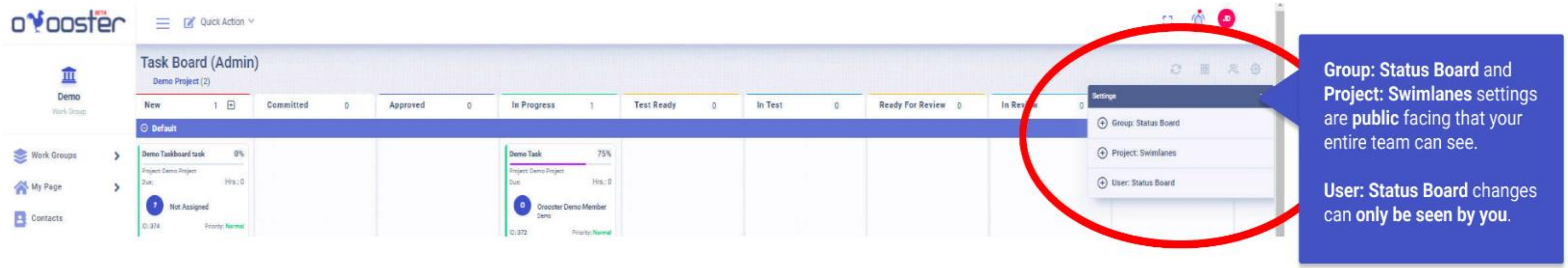


Go back Submenu

6h Filter settings

The icon on the **far right**, is the **settings** feature. Click the icon to see a **drop down** list with the option to **add a swimlane** to the team's task board, **change** the **status** color for the entire team, and **show/hide specific status columns** for yourself to see only.*





Go back Submenu

Thank you!

If you have any questions, email **support@orooster.com**

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