

Background

Registration

Work Groups

Project  
Management

My Page

Task Board



The ecosystem for managing the productivity of your workgroup.

# Overview

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**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**.





# Registration

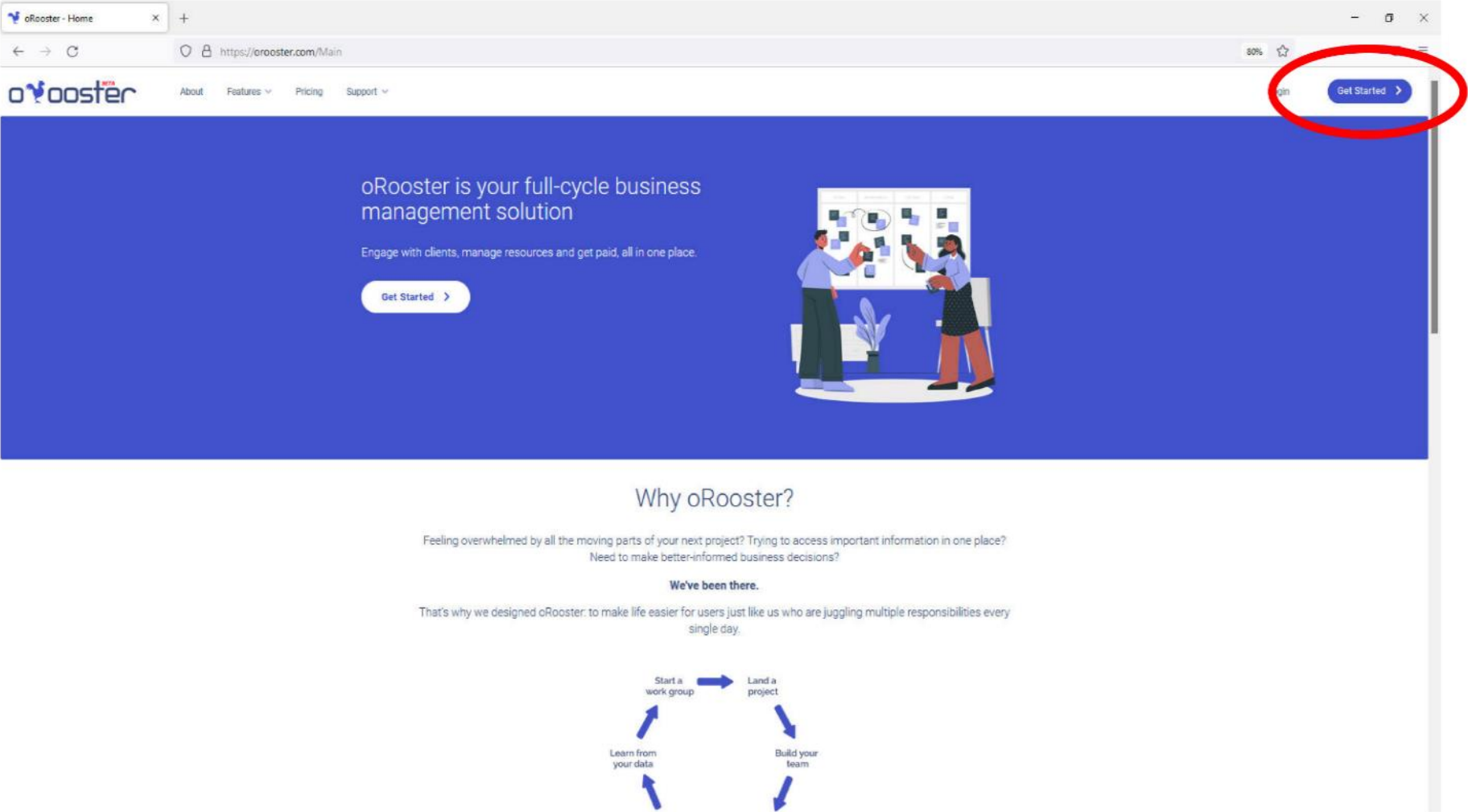
Get access to oRooster by creating your user account using the following steps.

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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).



## 2b

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

The screenshot shows a web browser window with the URL <https://orooster.com/Account/Register>. The registration form is titled "Register" and includes the following elements:

- Buttons for "Google", "Twitter", and "Facebook" login options.
- Input fields for "John" (first name), "Doe" (last name), "oroosterdemo@gmail.com" (email), and a mobile number (partially masked with "x").
- Two password input fields, both masked with "x".
- A checkbox labeled "I agree to the terms and policy" which is checked and circled in red.
- A checkbox labeled "I'm not a robot" next to a CAPTCHA image, which is also circled in red.
- A blue button labeled "→ Create a new account" and a "Cancel" link.
- A link at the bottom: "Already have an account? Login Here".

Four blue callout boxes provide additional instructions:

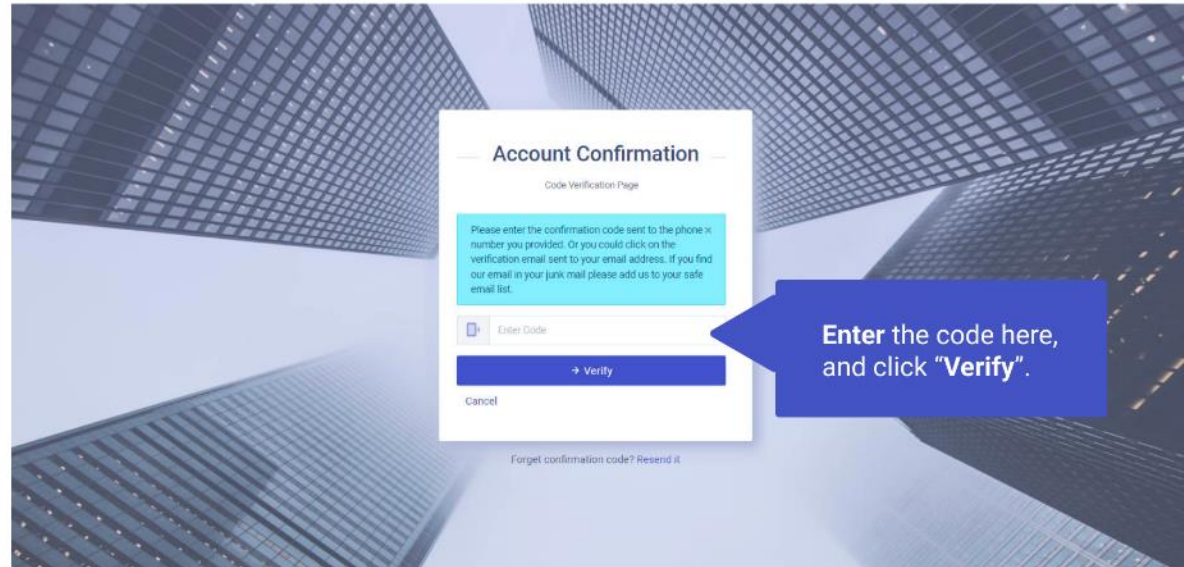
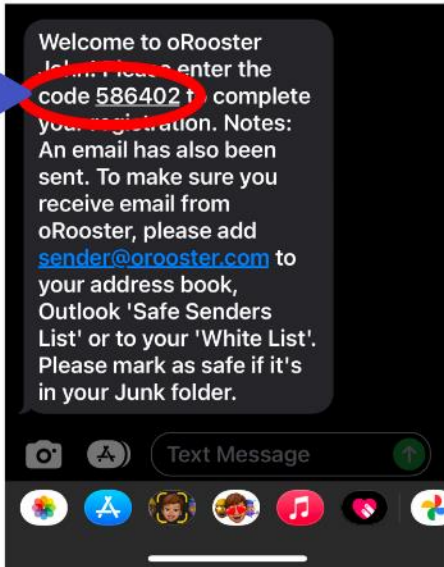
- Left callout:** "Since you can access multiple work groups and projects on oRooster, we ask you use a **personal email** address that's not tied to a current company's account."
- Bottom-left callout:** "To create your account, you must:  
1) **Check** this box once you've agreed to the **terms and policy** (the white box will fill in with blue and a check mark - as shown), and  
2) **Check** the box below that to verify you're **not a robot**."
- Right callout:** "To ensure security, we ask for your **email** and **mobile number** to perform a **2-step verification** process."
- Bottom-right callout:** "Lastly, click **\"Create a new account\"** once you've filled out all the boxes above."

## 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.

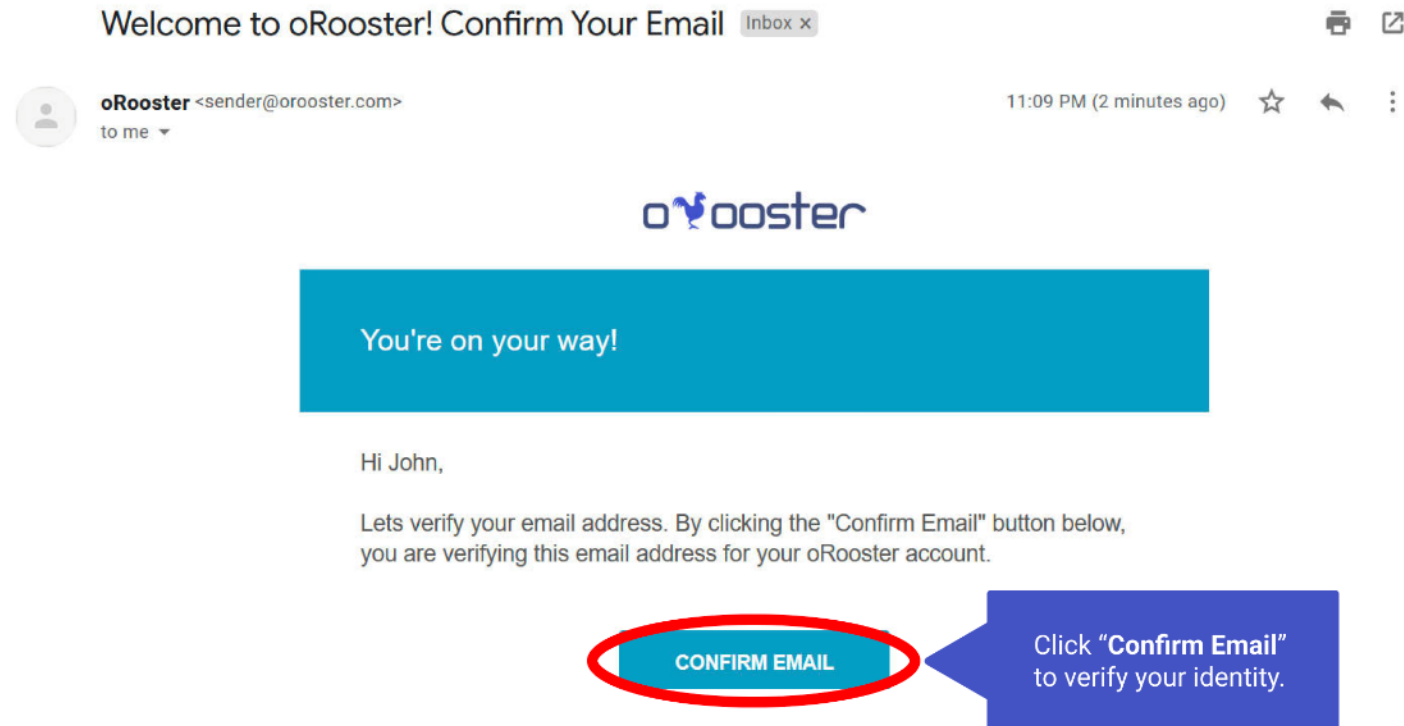


Enter the code here, and click "**Verify**".



**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.

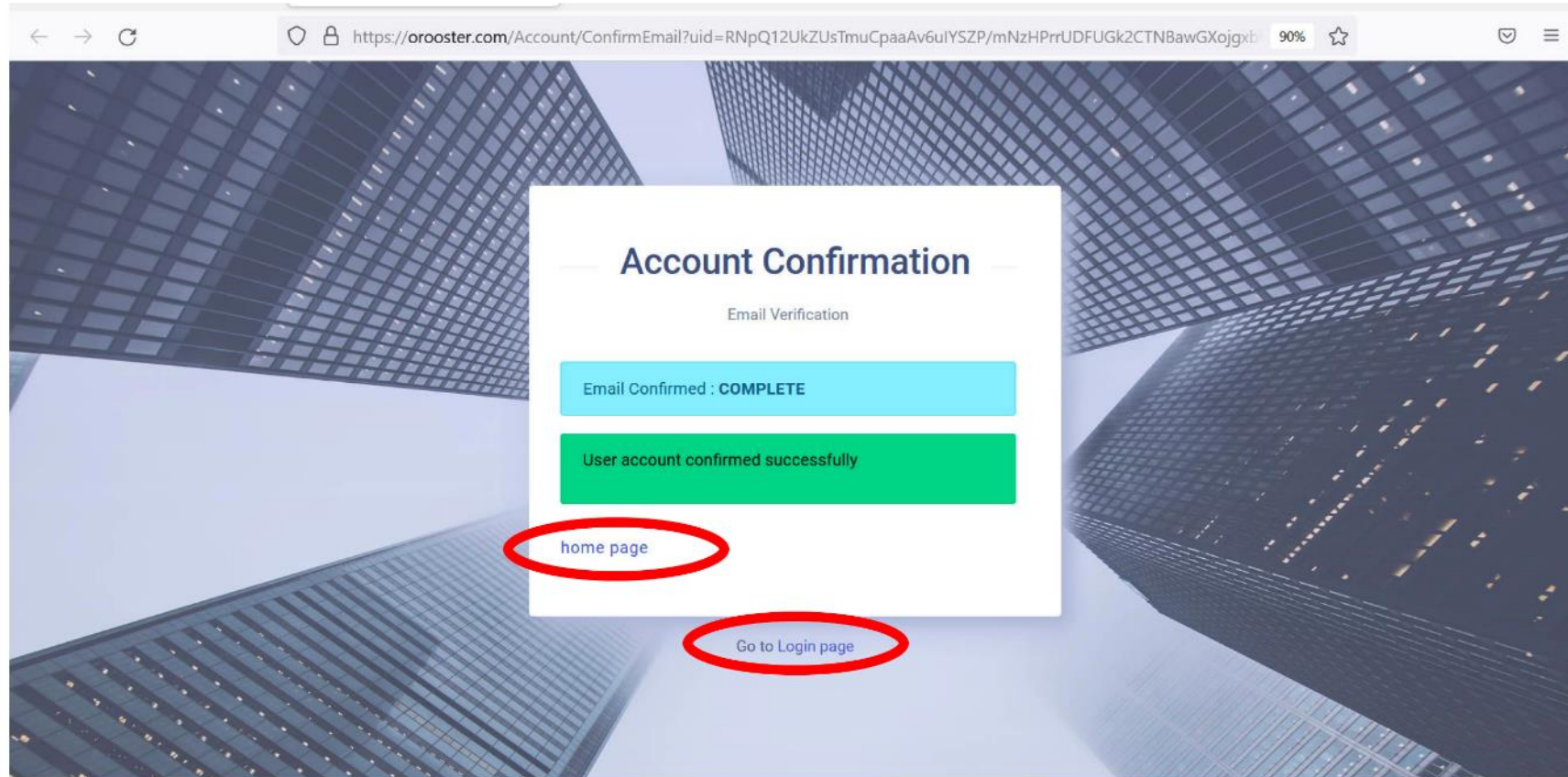
## Option 2: Via Email



2e

## Confirmation

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



# Work Group

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

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# Work Group

## Create a Private Work Group

3a

### Navigate to “Work Groups”

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

The screenshot shows the oRooster web application interface. The browser address bar displays 'https://orooster.com/MyApps'. The left navigation menu is visible, with the 'Work Groups' item highlighted by a red circle. The main content area shows the 'My Page' dashboard with various widgets: 'All Work Groups' (Summary: Owned: 1, Member of: 0, Inactive: 0), 'Task & Timesheet' (0 tasks, Billable: 0, Nonbillable: 0), 'Schedule' (0 tasks, Work: 0, Task: 0, Holiday: 0, Other: 0), 'PassVault' (1 vault, Categories: 1, Important: 0, Public: 0), 'oRooster Wallet' (0 accumulated earnings), 'Utilization' (0% average hours per week), 'Upcoming Schedules' (no schedules found), 'Notifications' (0 notifications), 'Projects Hours' (This Year), and 'Active Tasks' (no task found).

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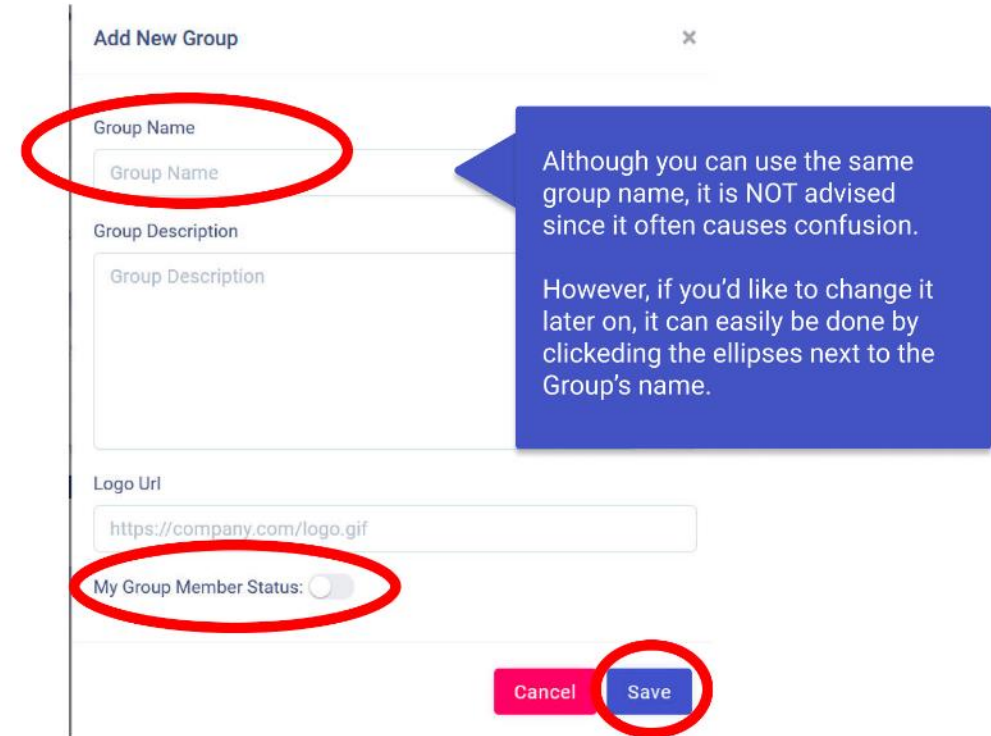
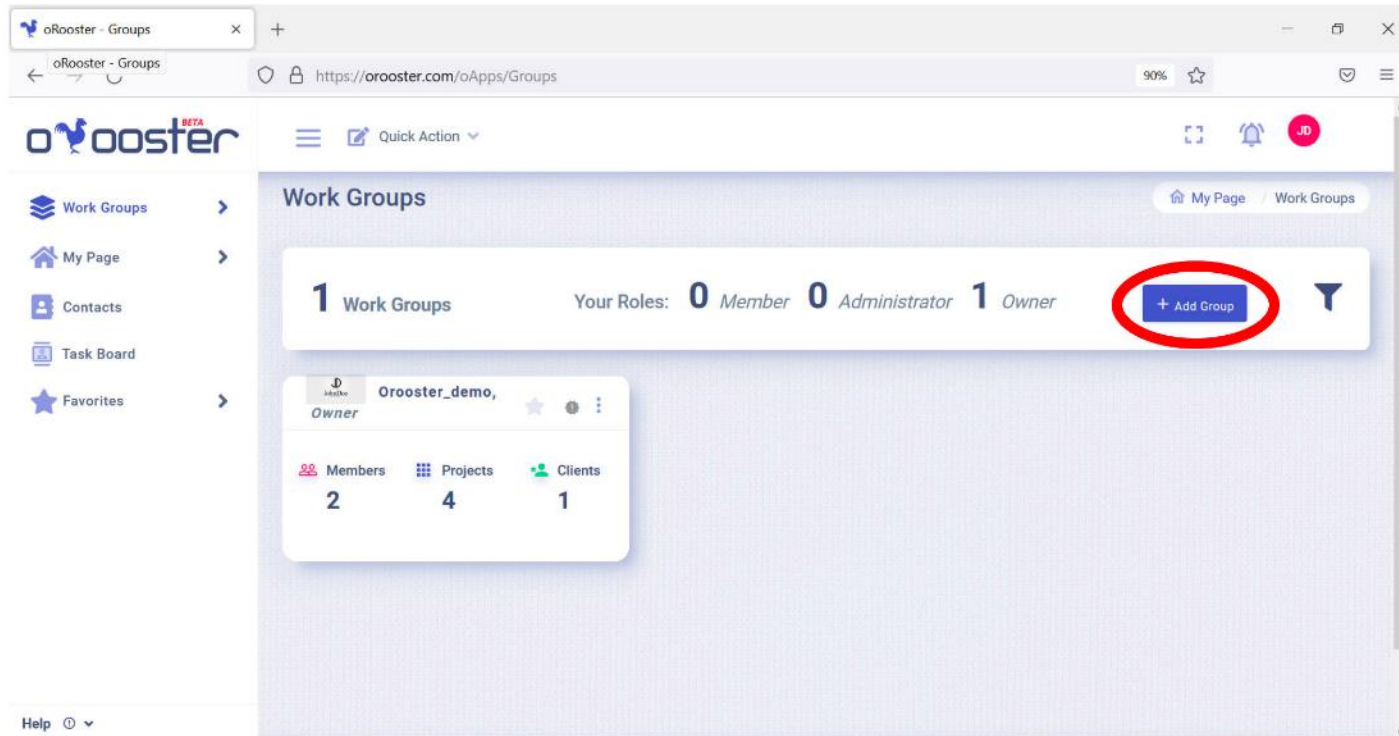
# Work Group

## Create a Private Work Group

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!

The screenshot shows the 'oRooster - Groups' page in a web browser. The URL is <https://orooster.com/oApps/Groups>. The page title is 'Work Groups'. The user's profile is 'JD'. The page shows a summary of work groups: '2 Work Groups' and 'Your Roles: 0 Member, 0 Administrator, 2 Owner'. There is a '+ Add Group' button. Below the summary, there are two work group cards:

Work Group Name	Role	Members	Projects	Clients
Demo, Owner	Owner	1	0	0
Orooster_demo, Owner	Owner	2	4	1

The 'Demo, Owner' card also includes the text 'This is a Demo Work Group'.

# Work Group

## Invite Users to Work Group

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.

The screenshot displays the oRooster web application interface. The browser address bar shows the URL <https://orooster.com/MyApps>. The page title is "oRooster BETA". The left navigation menu includes the following items: Work Groups, My Page, Contacts, Task Board, Favorites, Work Groups (expanded), Demo, Orooster\_demo, My Page, Contacts, Task Board, and Favorites. The "Work Groups" item in the top navigation menu is circled in red. The "Demo" item in the expanded "Work Groups" menu is also circled in red. The main content area shows the "My Page" dashboard with the following widgets: "All Work Groups" (Summary: Owned: 2, Member of: 0, Inactive: 0), "Task & Timesheet" (0, Billable: 0, Nonbillable: 0), "Schedule" (0, Work: 0, Task: 0, Holiday: 0, Other: 0), "PassVault" (1, Categories: 1, Important: 0, Public: 0), "Upcoming Schedules" (0), and "Notifications" (0). The bottom section of the dashboard shows a "Utilization" widget with a folder icon and the text "no schedules found".

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3e

### Add Members

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

The screenshot shows the oRooster web application interface. The top navigation bar includes the oRooster logo, a 'Quick Action' dropdown, and user profile information (JD). The main content area is divided into two sections. The first section, titled 'Demo' (Owner), displays four summary cards: 'Projects' (0), 'Time & Invoices (monthly)' (0), 'Teams & Members' (0 & 1), and 'Company & Clients' (0 & 0). The 'Teams & Members' card is circled in red. Below this section is the 'Teams & Members' page, which shows a 'Teams' section with 'no team found' and a 'Work Group Members' section with an 'Add Member' button circled in red.

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



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

Invite New Group Member

Role \* Active Member

Member

Member Type \* Availability (hr/wk)

Employee 40

Email \*

oroosterdemo@gmail.com

Phone Number \* (Numeric Only)

9255794286

Hourly Rate Title

20 Demo

Approval Manager \*

John Doe

Teams

Cancel Save

**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.

# Work Group

## Invite Users to Work Group

3g

### Member status

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

The screenshot shows the 'oRooster - Demo' web application interface. The main content area is titled 'Teams & Members' and shows a 'Demo' work group. Under the 'Work Group Members' section, a table lists two members. The first member, 'Email sent: Pending Confirmation (Member)', is circled in red. The second member is 'John Doe (Owner)'. Both members have a utilization of 0%.

MEMBER	PHONE	TEAM	TITLE	PROJECTS	UTILIZATION
Email sent: Pending Confirmation (Member) oroosterdemo@gmail.com	2330241648554		Demo	0	0%
John Doe (Owner) oroosterdemo@yahoo.com	+233501064139			0	0%

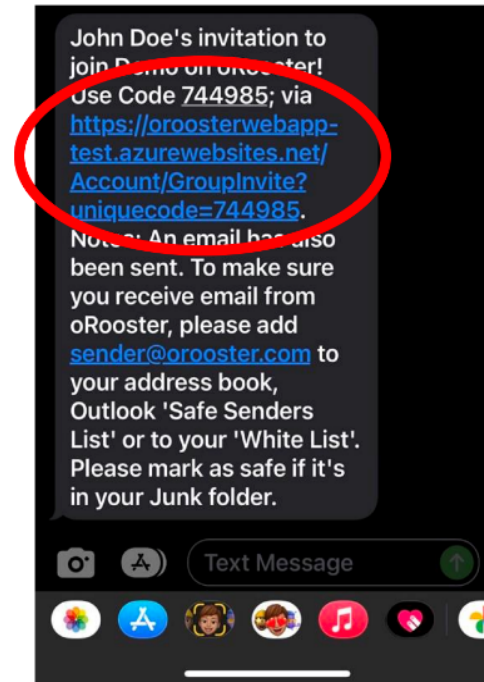
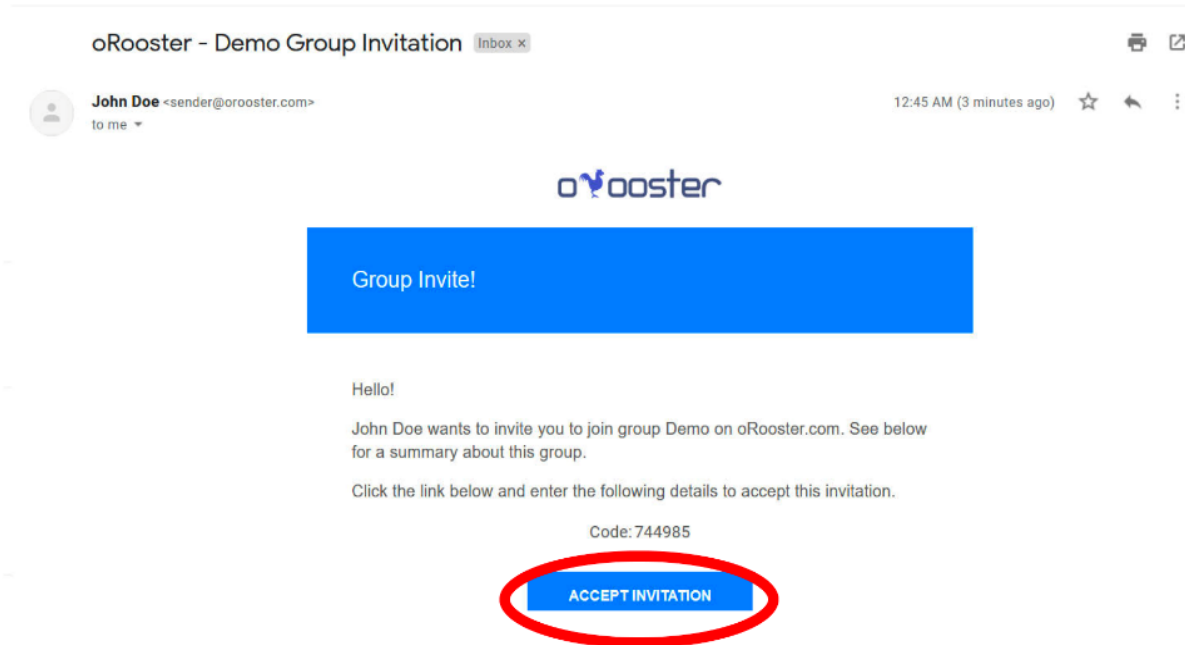
# Work Group

## 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**.

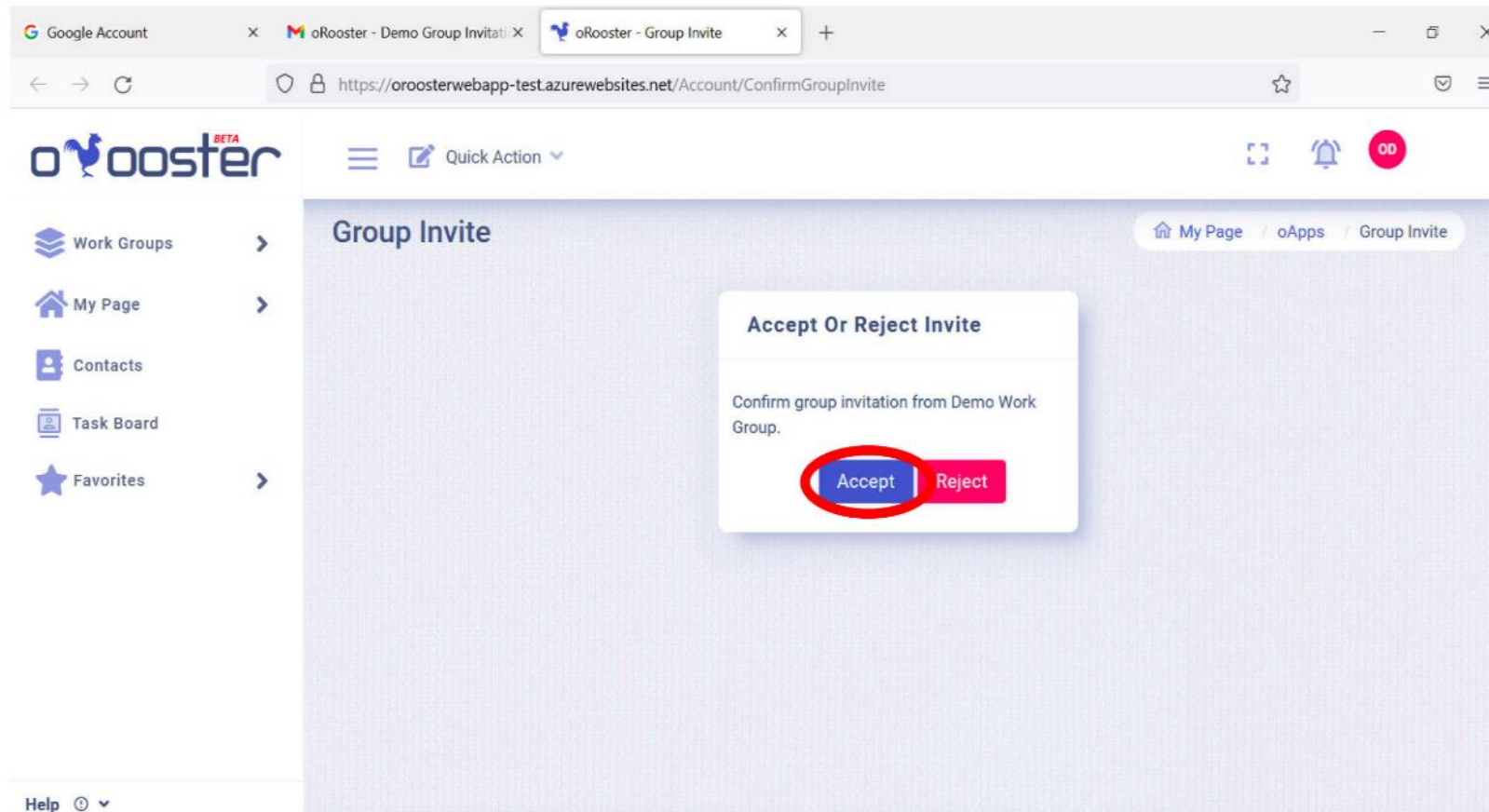


Go back Submenu

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.

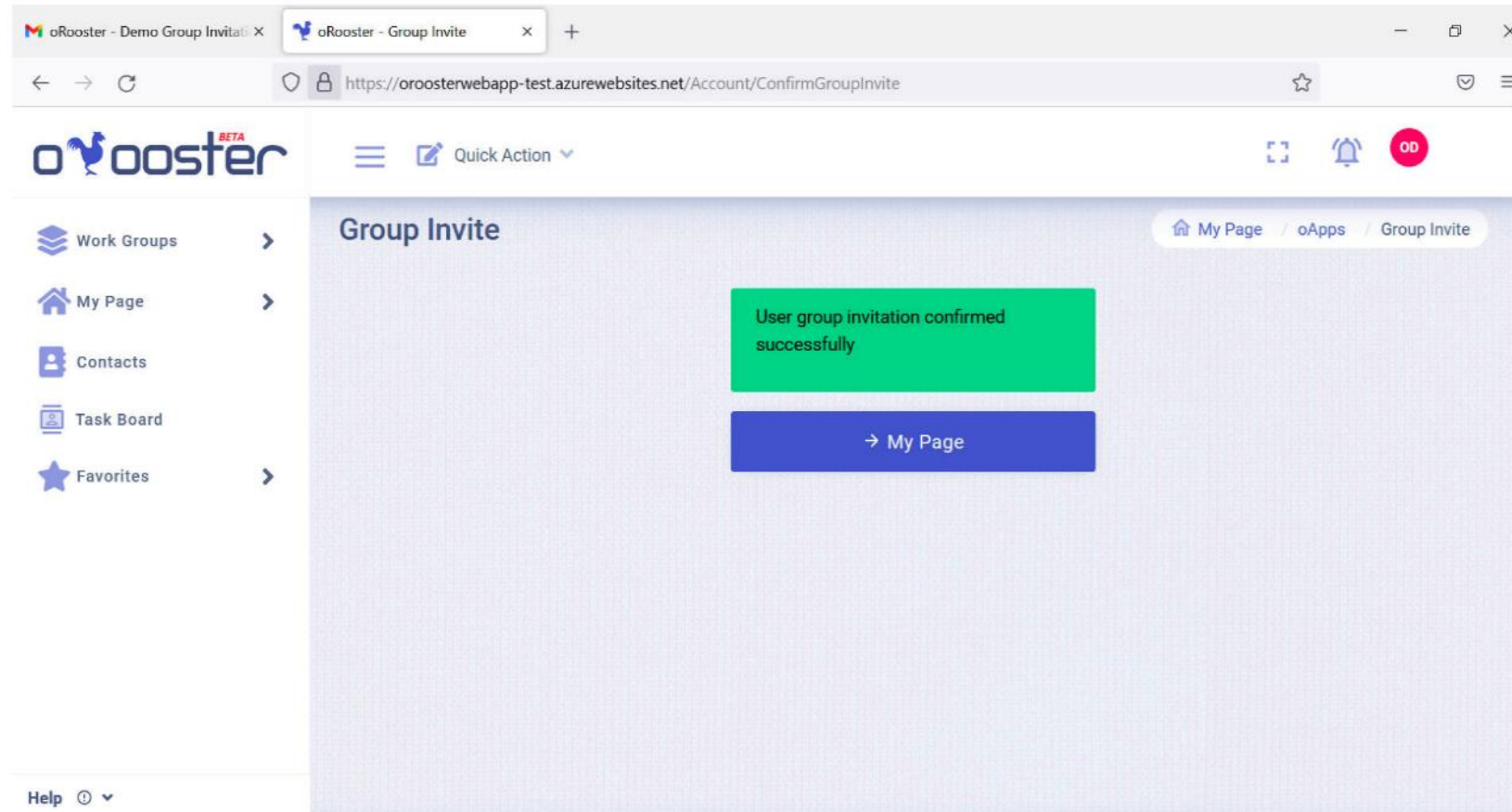


\* Note: Your user account log-in does not have to be the same as the invitation email account. Depending on which oRooster account you log-in to accept the invitation, that will be the account associated with the work group. If you do not have a user account, refer to slides on "Registration".

3j

### Confirmation

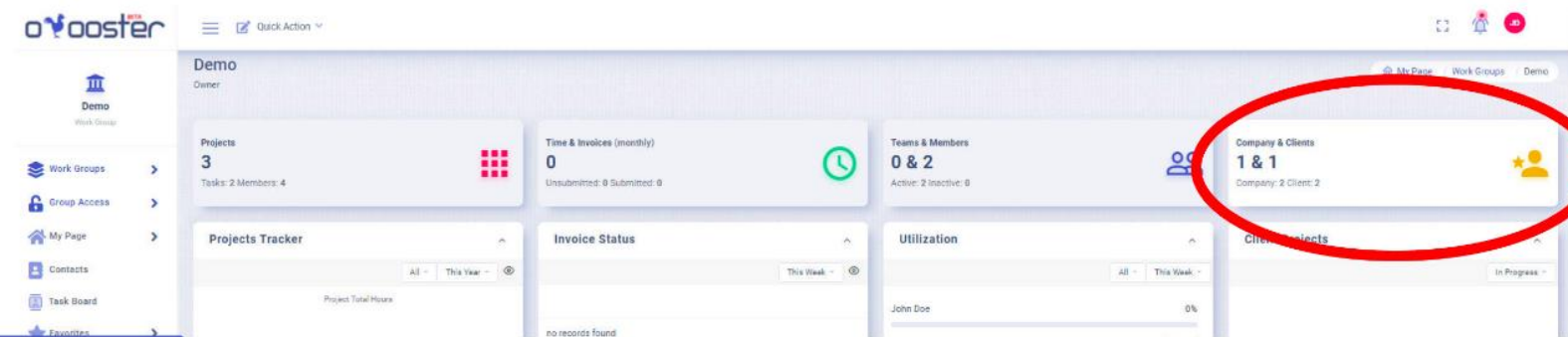
Once you've accepted the invite, you should see the view below. And now you're ready to move on to the next steps!



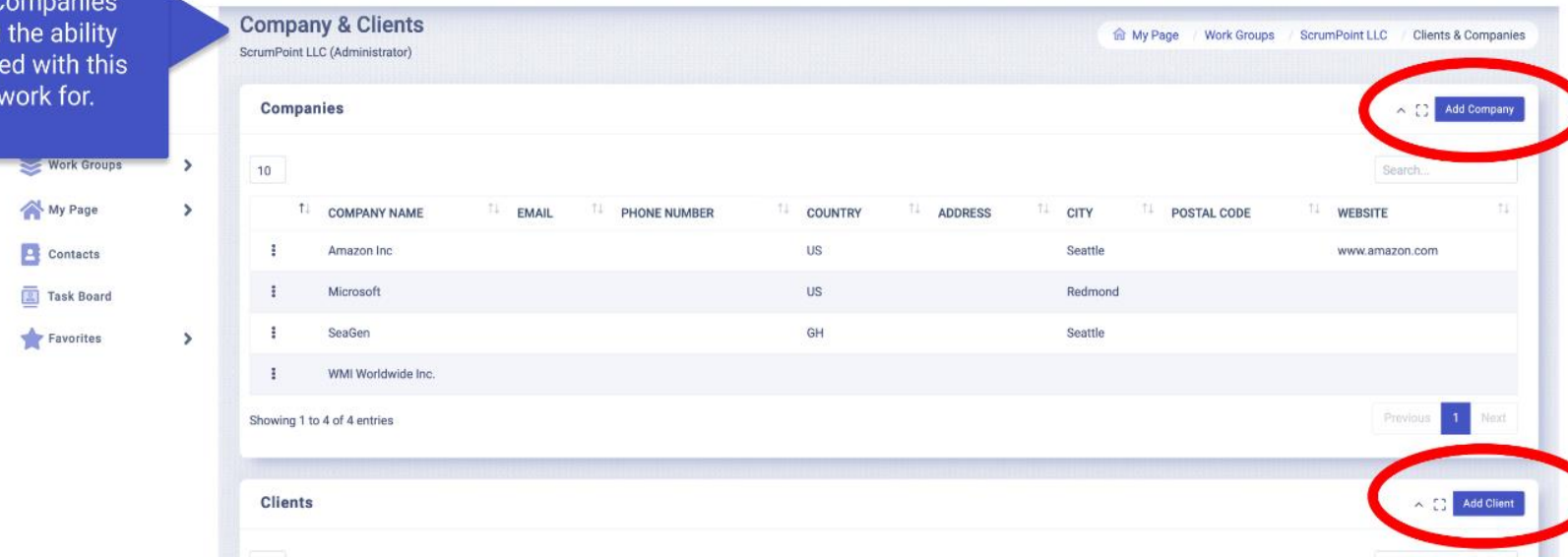
3k

## 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.



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## 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.

Add New Group Company

Company Name \*

Company name

Main Email

Email

Phone Number

Country

-- Select Country --

Address

Company Address

City Postal Code State

City Postal Code State

Website

www.companysite.com

Cancel Save

### New Client

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

Add New Group Client

Client Company Title

--Select Company-- CEO

First Name \* Last Name

First name Last name

Phone Number oRooster Handle

Email

Email

Country

-- Select Country --

Address

Company Address

City Postal Code State

City Postal Code State

Website

www.companysite.com

Birth Date Point of Contact

mm/dd/yyyy

Notes

Cancel Save

Go back Submenu

# Project Management

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

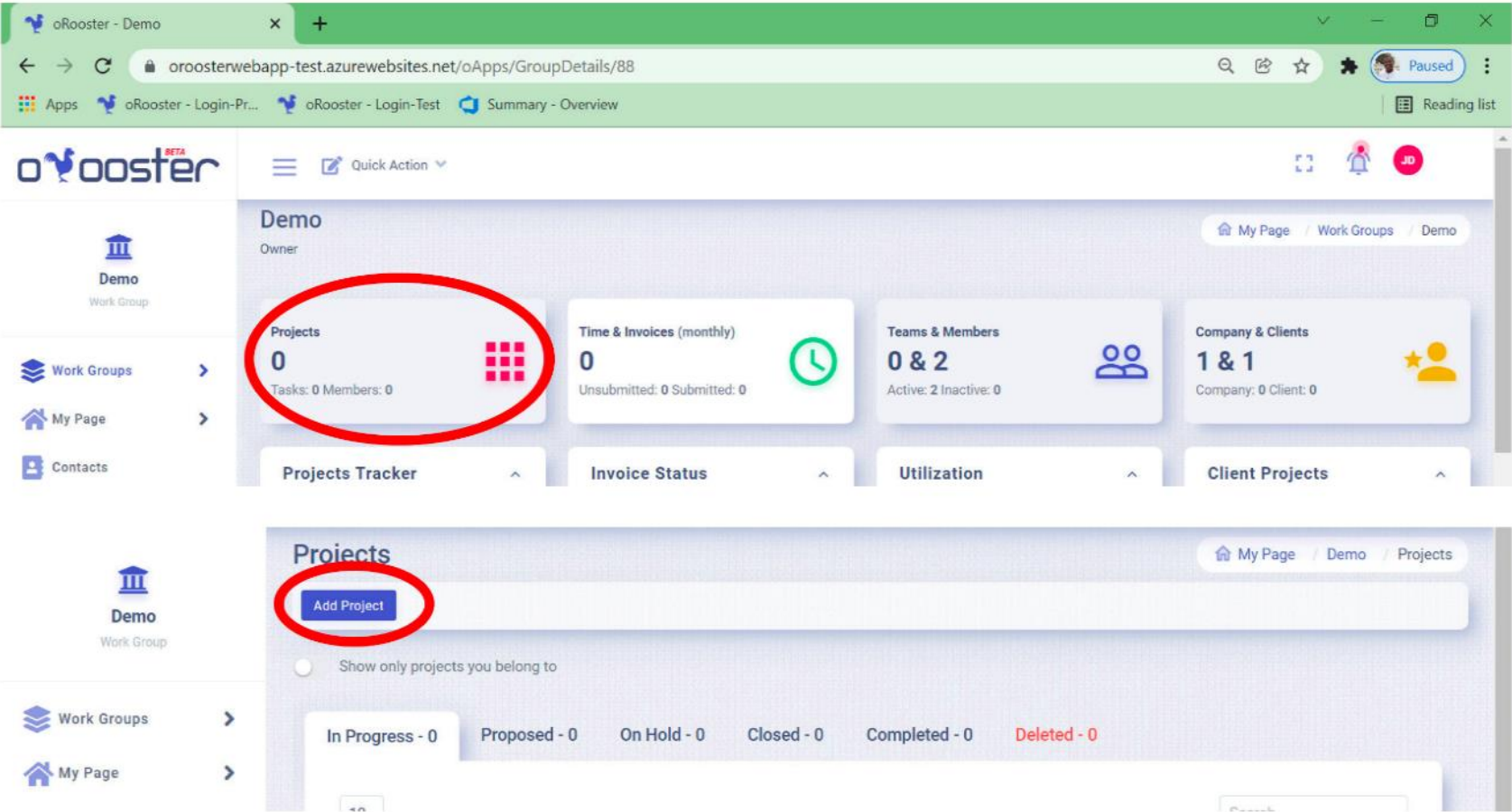
[Go back menu](#)



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 then click the **“Projects”** card. Once on the Projects dashboard, click on the **“Add Project”** button on the top right.



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.

The screenshot shows a form titled "Add New Group Project" with a close button (x) in the top right corner. The form contains the following fields and controls:

- Project Name \***: A text input field containing "Demo Project", circled in red.
- Project Client**: A dropdown menu with "John Doe" selected.
- Budget**: A numeric input field with "50000" and a spinner.
- Project Owner**: A toggle switch labeled "Add Proj Owner as Member" which is turned on (to the right), and a dropdown menu with "John Doe" selected.
- Project State**: A dropdown menu with "On Time & Within Budget" selected.
- Start Date**: A date picker with "01/27/2022" selected.
- End Date**: A date picker with "10/27/2023" selected.
- Project Category**: A dropdown menu.
- Project Status**: A dropdown menu with "In Progress" selected.
- SOW Number**: A text input field with "xxxxxx".
- PO Number**: A text input field with "xxxxxxx".
- Notes**: A text area containing "This is a demo project".
- Buttons**: "Cancel" and "Save" buttons at the bottom right, with "Save" circled in red.

\* 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.

The screenshot shows a form titled "Add New Group Project" with a close button (x) in the top right corner. The form contains the following fields and controls:

- Project Name \***: A text input field containing "Demo Project", which is circled in red.
- Project Client**: A dropdown menu with "John Doe" selected.
- Budget**: A numeric input field with "50000" and a spinner icon.
- Project Owner**: A dropdown menu with "John Doe" selected, and a toggle switch for "Add Proj Owner as Member" which is currently turned off.
- Project State**: A dropdown menu with "On Time & Within Budget" selected.
- Start Date**: A date picker with "01/27/2022" selected.
- End Date**: A date picker with "10/27/2023" selected.
- Project Category**: A dropdown menu.
- Project Status**: A dropdown menu with "In Progress" selected.
- SOW Number**: A text input field with "xxxxxx" entered.
- PO Number**: A text input field with "xxxxxxx" entered.
- Notes**: A text area containing "This is a demo project".
- Buttons**: "Cancel" and "Save" buttons at the bottom right, with the "Save" button circled in red.

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”**.

The screenshot displays the 'ooster' project management interface. The main content area is titled 'Project Detail' and shows a 'Demo Project' with a 37.5% completion rate. A dashboard of summary cards includes: Total Tasks (2), Completed Task (0%), Overdue Task (0%), Task Bucket (1), 1 Resource Type (highlighted with a red circle), 2 Project Members, 1 Milestones, and 0 Documents. Below these cards is a table for 'Resource Type' with columns for RESOURCE TYPE, MEMBERS, HOURS, and COST. The table contains one entry: 'Demo Resource' with 0 members, -40 hours, and -800.00 cost. A red circle highlights the 'Add Resource Type' button in the top right corner of the table area.

RESOURCE TYPE	MEMBERS	HOURS	COST
Demo Resource	0	-40	-800.00

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 details.

Add New Project Resource Type

Resource Type \*

Project Management

Hours Budgeted

0.0

Amount Budgeted

0.00

Notes

Resource Type Notes

Cancel Save

# Project Management

## Add Project Team & Members

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”**.

**ooster** Quick Action

Project Detail

**Demo Project**  
Client: John Doe  
Owner: John Doe

Percent Complete: 37.5%

Target Budget: 50000  
Actual Spend: 0.00

Total Tasks: 2  
Completed Task: 0%  
Overdue Task: 0%

Task Bucket: 1

1 Resource Type  
2 Project Members  
1 Milestones  
0 Documents (0)

**Add Member**

**Member Details**

MEMBER	TASK#	RATE	HOURS	COST
John Doe Member	0	0	0	0.00
John Doe Demo	1	20	0	0.00

**Tips:**

- Click here to navigate quickly to the project's **Task Board**.
- Click the trash icon to **delete** the project.
- Click the pencil icon to **edit** the project details.

Go back Submenu

# Project Management

## Add Project Team & Members

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 project).

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

The image displays three sequential screenshots of the 'Add/Edit Project Member' form. The first screenshot shows the 'Project Member' dropdown menu with a red circle around it. The second screenshot shows a search results list with 'Kerry' selected, and a red circle around the 'Save' button. The third screenshot shows the 'Save' button with a red circle around it. Below the screenshots, a green success message 'Success: User group project member updated successfully!' is shown with a red circle around it. The background shows the 'Project Detail' page for 'Demo Project'.

Go back Submenu

# Project Management

## Add Project Milestones

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”**.

The screenshot displays the ooster project management interface. The main content area is titled 'Project Detail' for a 'Demo Project'. It features several summary cards: 'Total Tasks' (2), 'Completed Task' (0%), 'Overdue Task' (0%), and 'Task Bucket' (1). Below these are cards for 'Resource Type' (1), 'Project Members' (2), 'Milestones' (1), and 'Documents (0)'. The 'Milestones' card is highlighted with a red circle. To the right of the 'Milestones' card, an 'Add Milestone' button is also highlighted with a red circle. The 'Milestones' section includes a table with the following data:

MILESTONE	START DATE	END DATE	BDG. AMT.	BDG. HRS.	% COMPLETE
Demo Project	Jan 27, 2022	Feb 28, 2022	3,000.00   0.00 + 3,000.00	50   0 + 50.0	Average for 1 Tasks 75.00%

Showing 0 to 0 of 0 entries

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!

The screenshot shows a form titled "Add New Project Milestone" with a close button (x) in the top right corner. The form contains the following fields:

- Milestone \***: A text input field containing "Project Management", which is circled in red.
- Start Date**: A date input field with a calendar icon, containing the placeholder "mm/dd/yyyy".
- Due Date**: A date input field with a calendar icon, containing the placeholder "mm/dd/yyyy".
- Hours Budgeted**: A numeric input field containing "0.0".
- Amount Budgeted**: A numeric input field containing "0.00".

At the bottom of the form, there are two buttons: a red "Cancel" button and a blue "Save" button, both of which are circled in red.

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

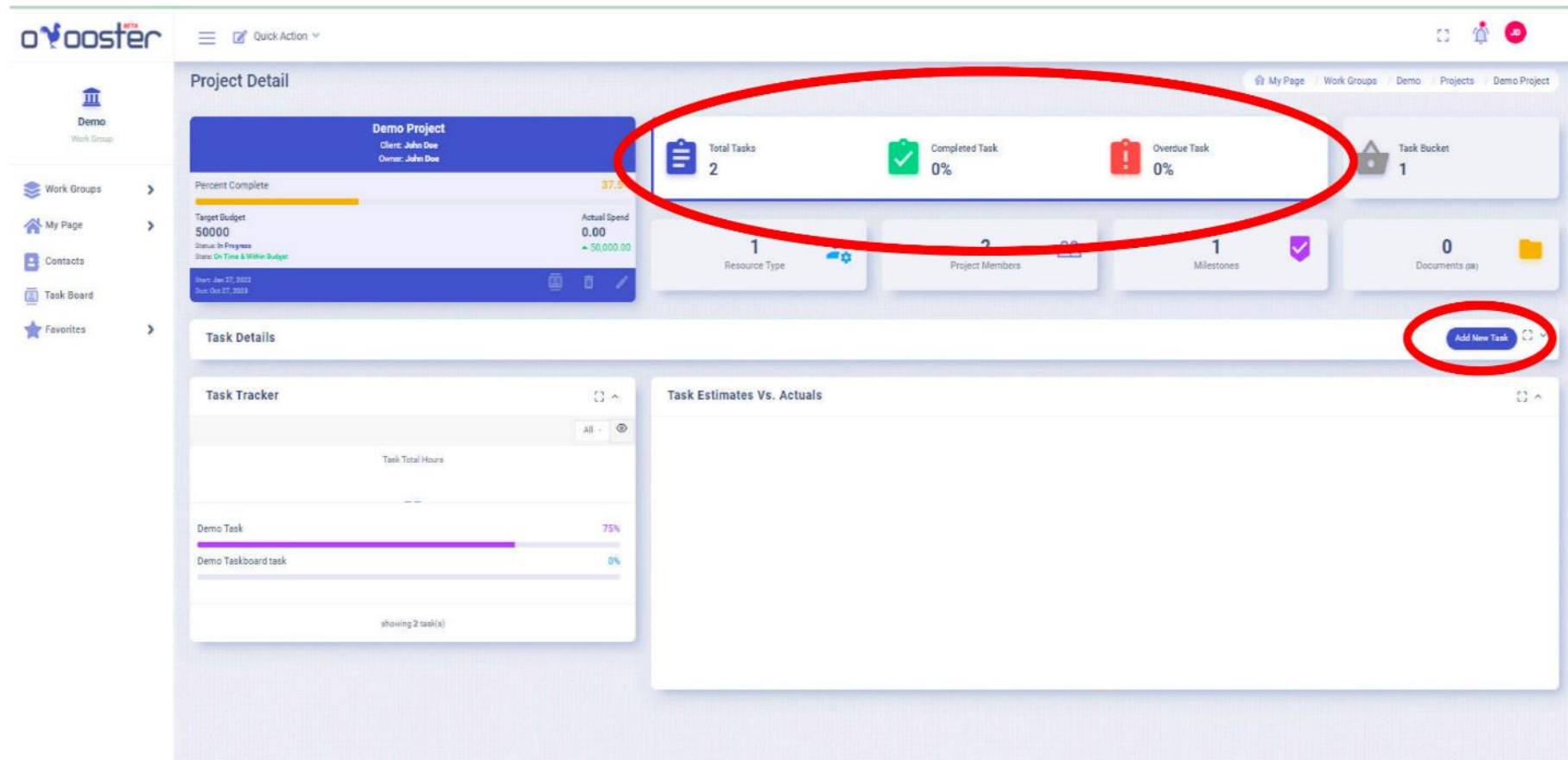
# Project Management

## Add Project Tasks

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**”.



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.

Add New Project Task

Task Name \*

Add task name

Task Type

General

Billable

Milestone

Assigned To

UnAssigned

Start Date

mm/dd/yyyy

Due Date

mm/dd/yyyy

Priority

Normal

Task Status

Estimated Time (Hrs.)

0.0

Actual Time (Hrs.)

0.0

% Complete

0

Completed Date

mm/dd/yyyy

Summary

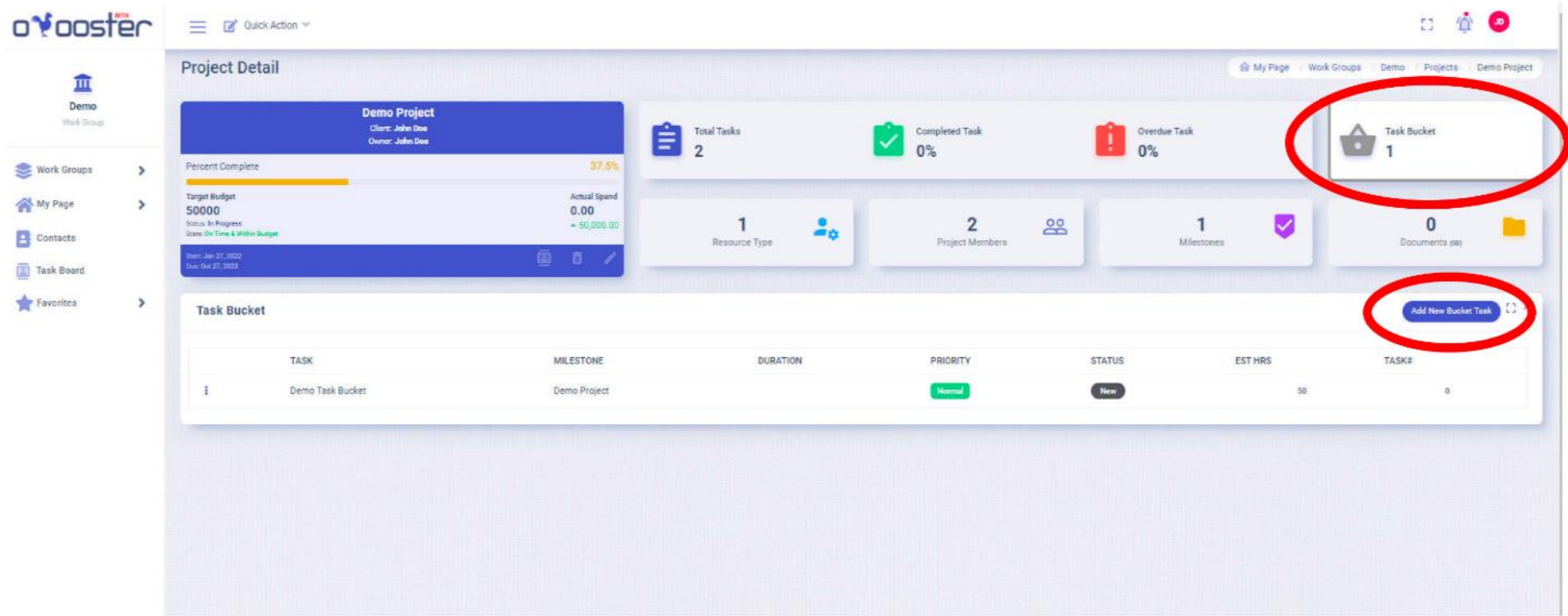
Additional details

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

4|

### 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"**.



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.

The screenshot shows the 'Add New Library Task' form with the 'Details' tab selected. The 'Members' tab is also visible and circled in red. The form includes fields for Task Name, Task Type (General), Billable (toggle), Milestone, Start Date, Due Date, Priority (Normal), Task Status, Estimated Time (0.0), and a Summary text area. At the bottom are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Add New Library Task' form with the 'Members' tab selected. The 'Members' tab is circled in red. Below the tab is a table with columns 'MEMBER' and 'TITLE'. The table contains two rows: 'John Doe' (Member) and 'Orooster Demo Member' (Demo). A 'Select all' button is at the bottom of the table. At the bottom of the form are 'Cancel' and 'Save' buttons.

MEMBER	TITLE
<input type="checkbox"/> John Doe	Member
<input type="checkbox"/> Orooster Demo Member	Demo

The screenshot shows the 'Add New Library Task' form with the 'Members' tab selected. The 'Save' button at the bottom right is circled in red. The table and 'Select all' button are visible above it.

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”**.

The screenshot displays the ooster project dashboard. The left sidebar contains navigation options: Demo (Work Group), Work Groups, My Page, Contacts, Task Board, and Favorites. The main content area is titled 'Project Detail' for 'Demo Project'. It features a summary card with 'Percent Complete' at 37.5%, 'Target Budget' of 50000, and 'Actual Spend' of 0.00. Below this is the 'Document Library' section, which includes a 'New folder' button and an 'Upload New Files' button. The 'Upload New Files' button is circled in red. A table below the library section shows columns for NAME, TASK, FILE TYPE, DATE UPLOADED, and SIZE, with the message 'no documents found'.

NAME	TASK	FILE TYPE	DATE UPLOADED	SIZE
no documents found				

# Project Management

## Document Library - Upload File

40

### 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"**.

Add New Project Document

Upload Document \*

Choose File No file chosen

Document Name \*

file name

Parent Folder

select folder

Task

Description

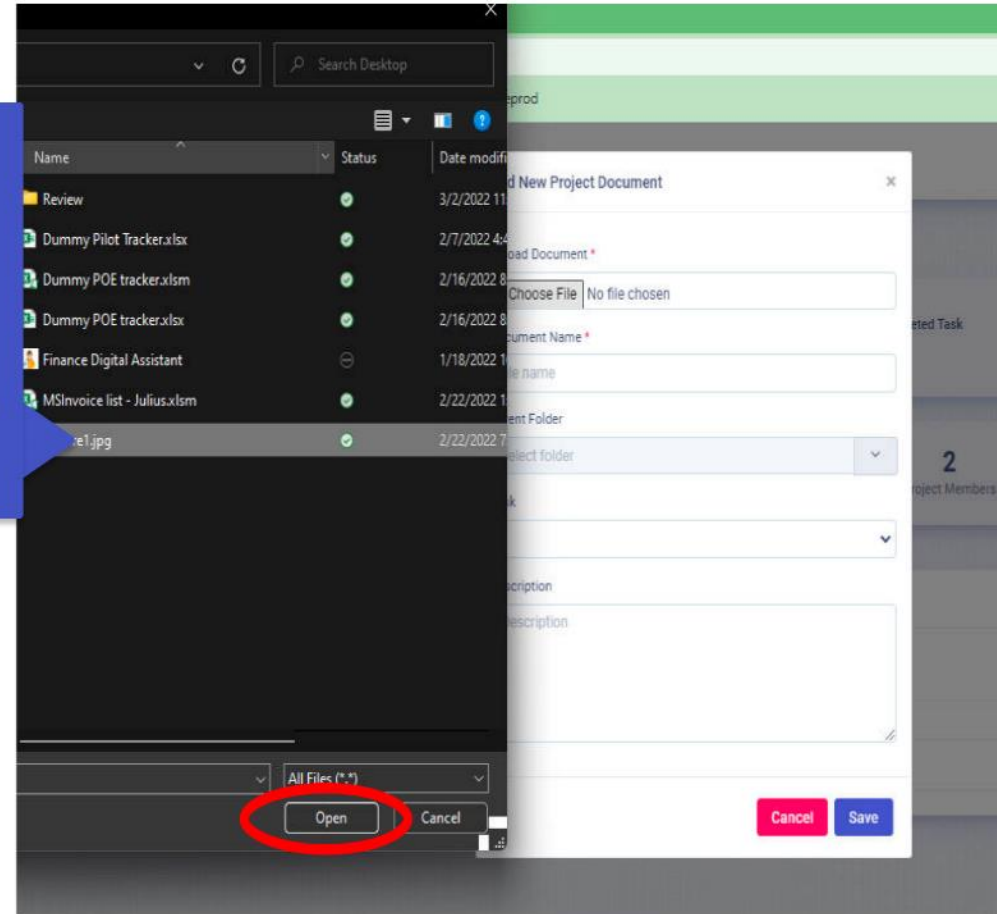
Description

Cancel Save

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 (shown on the right).

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



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.

The screenshot shows the 'My Page' dashboard in the oRooster application. The 'Task & Timesheet' card is highlighted with a red circle. Below it, the 'Tasks' tab is also highlighted with a red circle. A table of tasks is visible, with a callout pointing to the edit icon (three dots) next to the task name.

**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.

TASK	PROJECT	RESOURCE TYPE	START DATE	DUE DATE	PRIORITY	STATUS	EST. HRS.	ACT. HRS.	% COMPLETE
Demo Task	Demo Project		2/17/2022		Normal	Planning	0	0	0%

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.

The screenshot shows the ooster application interface. On the left sidebar, the 'Timesheet' tab is highlighted with a red circle. The main content area displays a table with columns: TASK, PROJECT, RESOURCE TYPE, START DATE, DUE DATE, PRIORITY, STATUS, EST. HRS., ACT. HRS., and % COMPLETE. A single entry is shown for 'Demo Task' under 'Demo Project' with a start date of 2/17/2022, priority 'Normal', and status 'Planning'. The table shows 0 estimated and 0 actual hours, and 0% completion. A search bar and pagination controls are also visible.

The screenshot shows the ooster application interface with the 'Timesheet' tab selected in the top navigation bar. The main content area displays a 'My Timesheet' section with a date selector set to 02/13/2022 and a 'Copy Previous Week Tasks' button. Below this is a table showing hours for each day of the week (SUN to SAT) and a total. The table shows 0 hours for all days and a total of 0 hours.

PROJECT TASK	TASK TYPE	STATUS	SUN 2/13/2022	MON 2/14/2022	TUE 2/15/2022	WED 2/16/2022	THU 2/17/2022	FRI 2/18/2022	SAT 2/19/2022	HRS. TOTAL
		Total	0	0	0	0	0	0	0	0

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 entries, you can either click the 1) blue “+” button or 2) “Copy Previous Week Tasks”.

The screenshot shows the 'Task & Timesheet' interface in the ooster system. The 'Timesheet' tab is active. A table displays task data for the week of 2/13/2022 to 2/19/2022. Two callouts are present: one pointing to the 'Copy Previous Week Tasks' button and another pointing to the blue '+' button. A 'Manage Invoice' button is also visible.

TASK TYPE	STATUS	SUN 2/13/2022	MON 2/14/2022	TUE 2/15/2022	WED 2/16/2022	THU 2/17/2022	FRI 2/18/2022	SAT 2/19/2022	HRS TO
Total		0	0	0	0	0	0	0	

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.

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”**.

New Time Entry

Select Task \*

-- select task --

or Add new task from Project

slide if entry is for new task

or Add new task from Task Bucket

slide if entry is for new task from bucket

Day Week

PunchIn Date \* 01/22/2022

PunchIn Time \* 04:07 PM

PunchOut Date \* 01/22/2022

PunchOut Time \* 04:07 PM

Punchout Hours \* 0.00

Notes

time entry notes

Cancel Save

New Time Entry

Select Task \*

Meetings

or Add new task from Project

slide if entry is for new task

or Add new task from Task Bucket

slide if entry is for new task from bucket

Day Week

Week Date

01/16/2022

Sun.	Mon.	Tue.	Wed.	Thur.	Fri.	Sat.
01/16	01/17	01/18	01/19	01/20	01/21	01/22
0	0	0	0	0	0	0

Notes

time entry notes

Cancel Save

New Time Entry

Select Task \*

Meetings

or Add new task from Project

slide if entry is for new task

or Add new task from Task Bucket

slide if entry is for new task from bucket

Day Week

Week Date

01/16/2022

Sun.	Mon.	Tue.	Wed.	Thur.	Fri.	Sat.
01/16	01/17	01/18	01/19	01/20	01/21	01/22
0	0.5	0.5	0.5	0.5	0.5	0

Notes

time entry notes

Cancel Save

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.

This screenshot shows the 'New Time Entry' form. The 'or Add new task from Project' toggle is circled in red. Below it, the 'Add task name' field is visible. The 'Day' tab is selected, and the punch-in and punch-out times are set to 04:16 PM on 01/22/2022. The punchout hours are 0.00. The 'Save' button is highlighted in blue.

This screenshot shows the 'New Time Entry' form. The 'or Add new task from Project' toggle is checked. The 'Select Project' dropdown menu is circled in red. The 'Task Name' field is empty. The 'Day' tab is selected, and the punch-in and punch-out times are set to 04:16 PM on 01/22/2022. The punchout hours are 0.00. The 'Save' button is highlighted in blue.

This screenshot shows the 'New Time Entry' form. The 'Task Name' field is filled with 'Meetings'. The 'Day' tab is selected. The 'Save' button is circled in red. The punch-in and punch-out times are set to 04:16 PM on 01/22/2022. The punchout hours are 0.00.

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.

This screenshot shows the 'New Time Entry' form. The 'Add new task from Task Bucket' toggle is highlighted with a red circle. Below it, the 'Day' and 'Week' tabs are visible, with the 'Day' tab selected. The form includes fields for 'PunchIn Date', 'PunchIn Time', 'PunchOut Date', 'PunchOut Time', and 'Punchout Hours'. The 'Notes' field contains the text 'time entry notes'. At the bottom, there are 'Cancel' and 'Save' buttons.

This screenshot shows the 'New Time Entry' form. The 'Select Task Bucket' dropdown menu is highlighted with a red circle. The 'Day' and 'Week' tabs are visible, with the 'Day' tab selected. The form includes fields for 'PunchIn Date', 'PunchIn Time', 'PunchOut Date', 'PunchOut Time', and 'Punchout Hours'. The 'Notes' field contains the text 'time entry notes'. At the bottom, there are 'Cancel' and 'Save' buttons.

This screenshot shows the 'New Time Entry' form. The 'Day' tab is highlighted with a red circle. The form includes fields for 'PunchIn Date', 'PunchIn Time', 'PunchOut Date', 'PunchOut Time', and 'Punchout Hours'. The 'Notes' field contains the text 'time entry notes'. At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button also highlighted by a red circle.

# Projects

## Schedule - Adding Events

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 indicate that calendar is being hidden on your general calendar view.

+ Add New Event

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.

MON	TUE	WED	THU	FRI	SAT	SUN
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16

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.

The screenshot shows a form titled "Event Detail" with a close button (x) in the top right corner. The form contains the following fields and controls:

- Title \***: A text input field with the placeholder "Add title". This field is circled in red.
- All Day Event**: A checkbox that is currently unchecked.
- Start Date \***: A date input field with the placeholder "mm/dd/yyyy" and a calendar icon, followed by a "Select Time" dropdown menu.
- End Date \***: A date input field with the placeholder "mm/dd/yyyy" and a calendar icon, followed by a "Select Time" dropdown menu.
- Schedule Type \***: A dropdown menu.
- Show Event in Work Group**: A label with an information icon, followed by a "Select Group" dropdown menu.
- Description**: A text area with the placeholder "Write some description (optional)".
- Save**: A blue button, circled in red.
- Cancel**: A grey button.

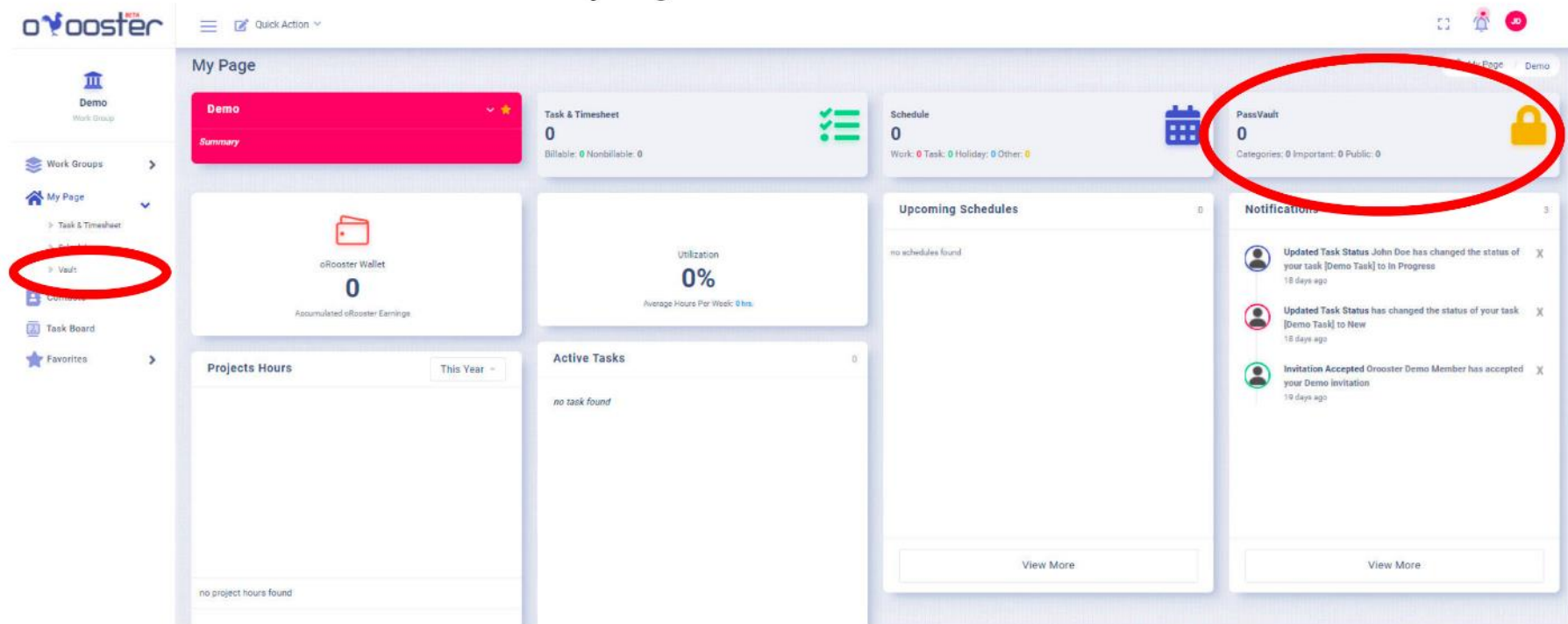
Select a specific Work Group to show on all calendars to all members.



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”**.



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.

The screenshot displays the ooster Vault interface. On the left, there is a sidebar with navigation options: Demo, Work Groups, Group Access, My Page, Contacts, Task Board, and Favorites. The main area shows 'Vault' with '0 Sites Total' and 'You shared: 0 Shared with you: 0'. A blue '+ Add New Item' button is circled in red, with a dropdown menu showing 'Add Link' and 'Add Category'. To the right, the 'Add New Category' form is open, featuring a 'Category Name' input field, a 'Group Description' text area, and 'Cancel' and 'Save' buttons at the bottom.

# Projects

## Adding Bookmarks & Passwords

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.

The screenshot shows the oRooster Vault interface. On the left is a navigation sidebar with options like 'Work Groups', 'Group Access', 'My Page', 'Contacts', 'Task Board', and 'Favorites'. The main area is titled 'Vault' and shows '0 Sites Total' and 'You shared: 0 Shared with you: 0'. A blue '+ Add New Item' button is circled in red, with a dropdown menu open showing 'Add Link' and 'Add Category', both also circled in red. To the right, a modal form for adding a link is displayed. The 'Title\*' field is circled in red. Other fields include 'Site Name', 'Link' (with 'https://websiteslink.com' entered), 'User Name', 'Email', 'Password', 'Tag (25 characters max)', 'Description', and 'Notes'. At the bottom of the form, 'Cancel' and 'Save' buttons are visible, with 'Save' circled in red.

If you include your password here, it will be stored and encrypted to ensure secure access.

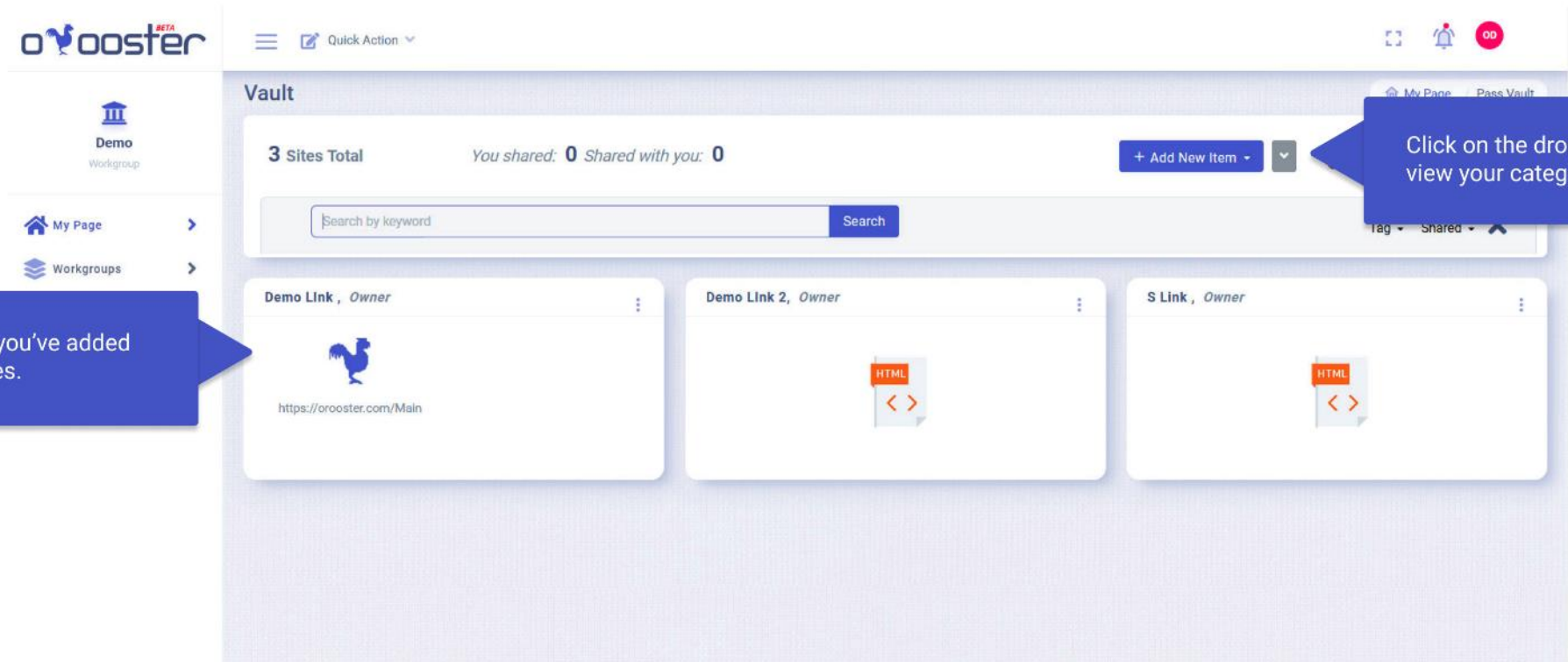
Once saved, you must enter in your oRooster login information to gain visibility of your password for that given site.

Go back Submenu

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### 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.

# 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.

The screenshot displays the oRooster web application interface. The browser address bar shows the URL <https://oroosterwebapp-test.azurewebsites.net/MyApps>. The application header includes the oRooster logo, a 'Quick Action' dropdown, and user profile information. The left navigation menu is visible, with the 'Task Board' option highlighted by a red circle. The main content area, titled 'My Page', contains several dashboard widgets: a 'Demo Summary' card, a 'Task & Timesheet' card showing 1 task (0 billable, 1 nonbillable), a 'Schedule' card showing 1 task (0 work, 0 holiday, 1 other), a 'PassVault' card showing 3 items (1 category, 0 important, 0 public), an 'oRooster Wallet' card showing 0 accumulated earnings, a 'Utilization' card showing 0% average hours per week, an 'Upcoming Schedules' card for February 23, 2022, and a 'Notifications' card with 6 items. At the bottom, there are 'Projects Hours' and 'Active Tasks' sections, with the 'Active Tasks' section showing a progress bar for 'Demo Task' at 75%.

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

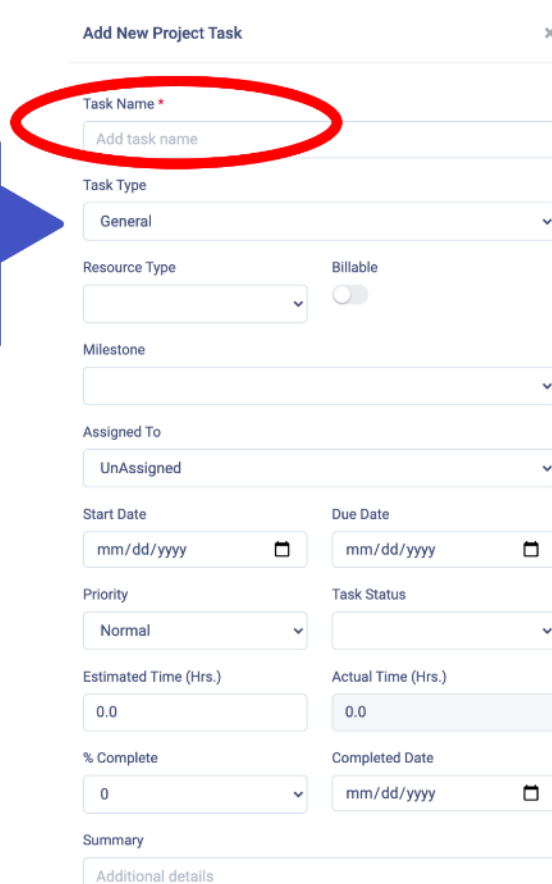
The screenshot displays the oRooster Task Board interface. The browser address bar shows the URL: `oroosterwebapp-test.azurewebsites.net/oApps/ProjectTaskBoard`. The page title is "Task Board" for "Demo Project (1)". The interface features a navigation sidebar on the left with options like "Demo Work Group", "Work Groups", "My Page", "Contacts", "Task Board", and "Favorites". The main area shows a Kanban-style task board with columns: "New" (0 items), "Planning" (0 items), "Committed" (0 items), "Approved" (0 items), "In Progress" (1 item), and "Test Ready" (0 items). A red circle highlights a "+" button in the top right corner of the "New" column. A task card is visible in the "In Progress" column, titled "Demo Task" with a 75% progress bar, project "Demo Project", and priority "Normal".

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).



The screenshot shows a form titled "Add New Project Task" with a close button (x) in the top right corner. The form contains the following fields and controls:

- Task Name \***: A text input field with the placeholder "Add task name", circled in red.
- Task Type**: A dropdown menu currently showing "General".
- Resource Type**: A dropdown menu.
- Billable**: A toggle switch.
- Milestone**: A dropdown menu.
- Assigned To**: A dropdown menu currently showing "UnAssigned".
- Start Date**: A date input field with the format "mm/dd/yyyy" and a calendar icon.
- Due Date**: A date input field with the format "mm/dd/yyyy" and a calendar icon.
- Priority**: A dropdown menu currently showing "Normal".
- Task Status**: A dropdown menu.
- Estimated Time (Hrs.)**: A text input field with the value "0.0".
- Actual Time (Hrs.)**: A text input field with the value "0.0".
- % Complete**: A dropdown menu currently showing "0".
- Completed Date**: A date input field with the format "mm/dd/yyyy" and a calendar icon.
- Summary**: A text input field with the placeholder "Additional details".

Go back Submenu



# Task Board

## Filter Task Board

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**.

The screenshot displays the 'ooster' Task Board (Admin) interface. The top navigation bar includes the 'ooster' logo, a 'Quick Action' dropdown, and a notification bell icon. The main header shows 'Task Board (Admin)' for 'Demo Project (2)'. Below this is a progress bar with columns for task stages: New (1), Committed (0), Approved (0), In Progress (1), Test Ready (0), In Test (0), Ready For Review (0), In Review (0), Prod Ready (0), and On Hold (0). A red circle highlights the top right corner of the task board area, containing icons for refresh, grid view, filter, and settings. The left sidebar shows navigation options: Demo (Work Group), Work Groups, My Page, Contacts, Task Board, and Favorites. The main content area shows a task card for 'Demo Taskboard task' (0%) and a task card for 'Demo Task' (75%).

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.

The screenshot displays the ooster Task Board (Admin) interface. The top navigation bar includes the ooster logo, a Quick Action menu, and a refresh icon circled in red. The main content area shows a task board for 'Demo Project (2)' with columns for various task stages: New (1), Committed (0), Approved (0), In Progress (1), Test Ready (0), In Test (0), Ready For Review (0), In Review (0), Prod Ready (0), and On Hold. The 'In Progress' column contains two task cards: 'Demo Taskboard task' (0% complete) and 'Demo Task' (75% complete). The left sidebar shows navigation options: Demo, Work Groups, My Page, Contacts, Task Board, and Favorites.

# Task Board

## Filter Task Board

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.

The image displays three sequential screenshots of the oVoooster Task Board interface, illustrating the 'Filter by member' feature. Each screenshot shows a sidebar on the left with navigation options like 'Demo', 'Work Groups', 'My Page', and 'Contacts'. The main area is titled 'Task Board (Admin)' for 'Demo Project (2)'. A progress bar at the top shows task counts across various stages: New (1), Committed (0), Approved (0), In Progress (1), Test Ready (0), In Test (0), Ready For Review (0), In Review (0), Prod Ready (0), and On Hold (0). Below this, a 'Default' filter is active, showing a task 'Demo Taskboard task' at 0% completion and a 'Demo Task' at 75% completion. The 'Demo Task' is assigned to 'Crooster Demo Member Demo'. In the top right corner of each screenshot, there is a filter icon (a person with a plus sign) circled in red. In the second screenshot, a dropdown menu is open, showing 'John Doe' and 'Crooster Demo Member' as options, with 'John Doe' circled in red. In the third screenshot, the 'John Doe' filter is applied, appearing as a dark grey box with an 'X' to clear it, also circled in red.

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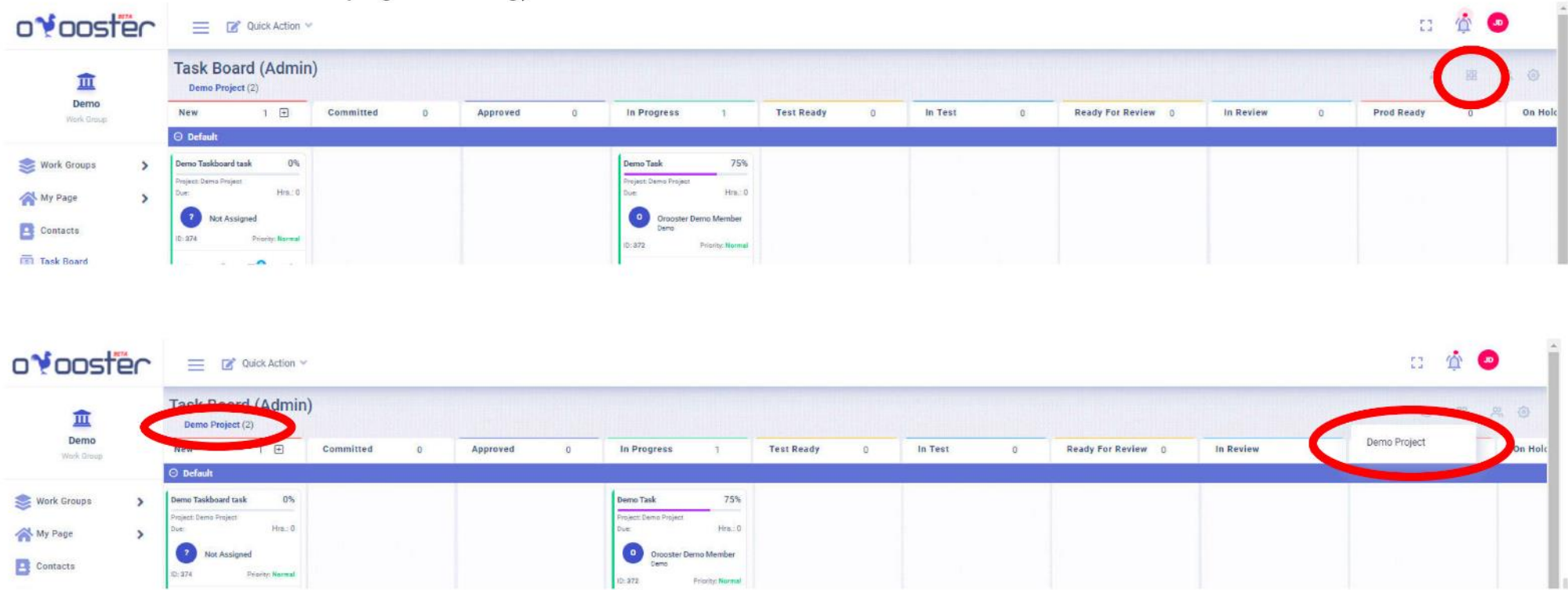
# Task Board

## Filter Task Board

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).



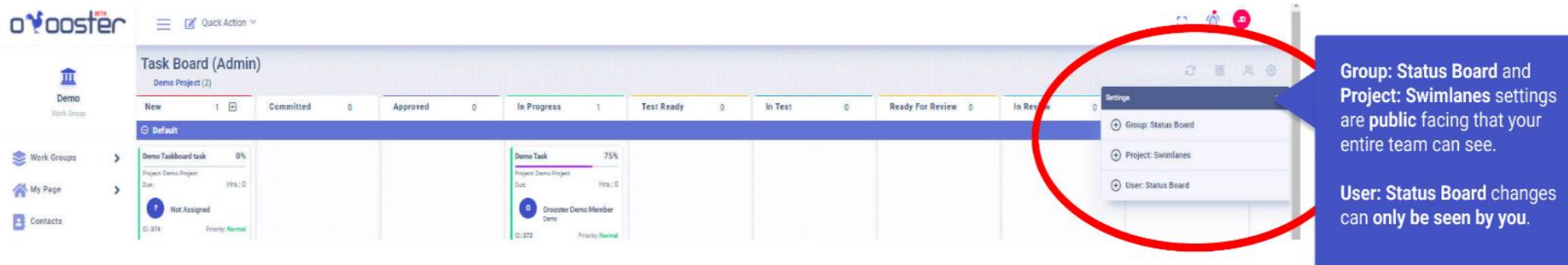
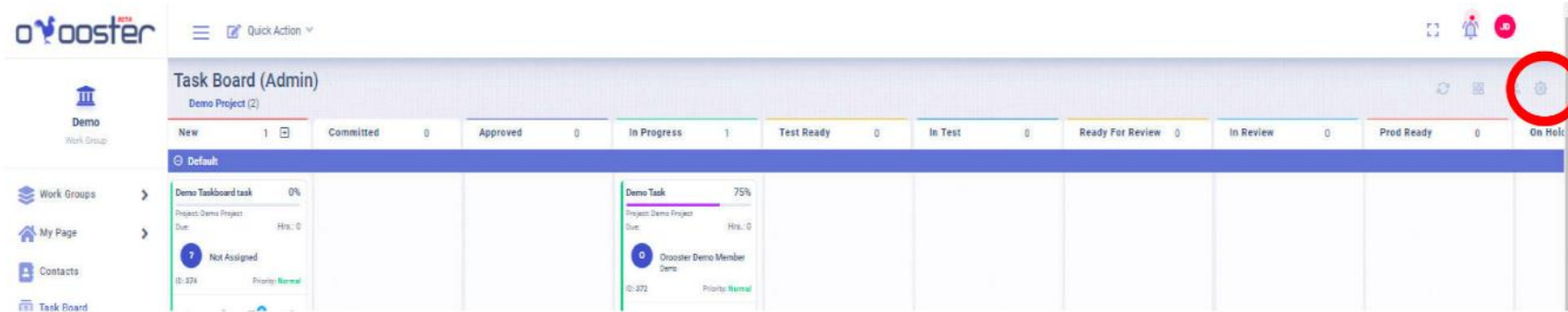
# Task Board

## Filter Task Board

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.\*





# Thank you!

If you have any questions, email [support@orooster.com](mailto:support@orooster.com)

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