



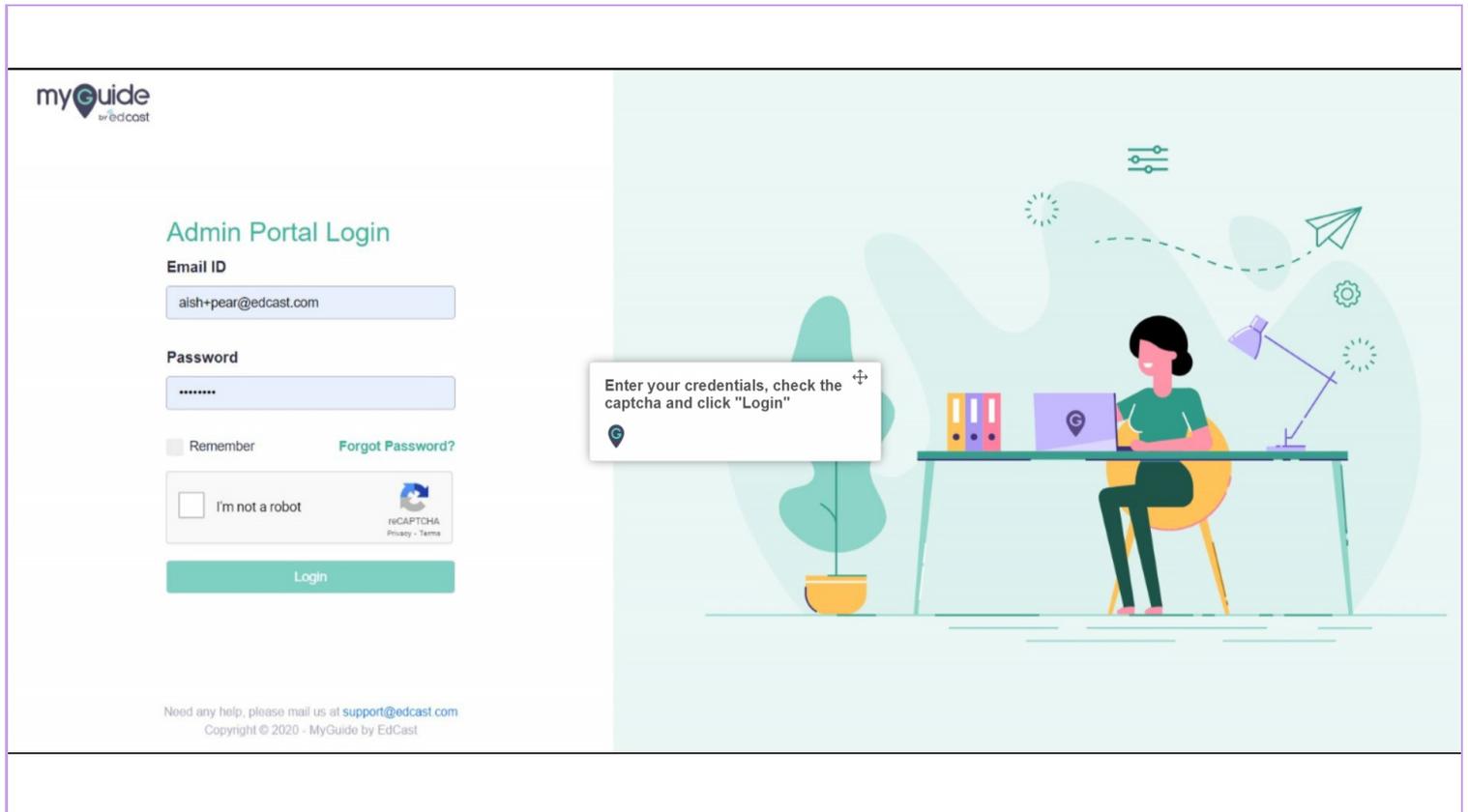
## How to configure Task List

## Step: 01

- Task Lists allow admins to assign workflow guides to their employees as a part of their onboarding/training process; employees can access these guides by clicking on the task list widget and play them one by one in any order.
- Admins create task lists by selecting guides from their respective organizations in the MyGuide Admin portal; they then assign these task lists to users.
- To access the task lists, users simply have to click on the task list widget  appearing on the left side of their browser.
- In this guide, you will learn how to configure a Task List and how to view guides on a Task List.

## Step: 02

Enter your credentials, check the captcha and click "Login"



**myGuide**  
by edcast

### Admin Portal Login

**Email ID**

**Password**

Remember [Forgot Password?](#)

I'm not a robot  reCAPTCHA  
Privacy - Terms

[Login](#)

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Enter your credentials, check the captcha and click "Login"

## Step: 03

Enter the OTP that has been sent to your registered email id and click on "Verify Account"

**myGuide**  
by edcast

### Verify Account

OTP has been sent to Please enter the one time password to verify your account

**OTP**

Verify Account

Didn't receive an OTP? 37 seconds

[Back to Login](#)

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Enter the OTP that has been sent to your registered email id and click on "Verify Account"

## Step: 04

1) Click on "Task List" tab

The screenshot displays the myGuide by EdCast dashboard interface. On the left, a dark sidebar contains a list of navigation items: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The 'Task List' item is highlighted with a red border. The main content area shows a breadcrumb 'Dashboard' and three summary cards: '1 ORGANIZATIONS', '2 APPLICATIONS', and '2 USERS'. A callout box with a location pin icon points to the 'Task List' item in the sidebar, containing the text 'Click on "Task List" tab'. The top right of the dashboard shows a 'Download' button and a user profile for 'Aishwarya'. The footer includes the copyright notice 'Copyright © 2020 - MyGuide by EdCast' and a support email address 'support@edcast.com'.

# Step: 05

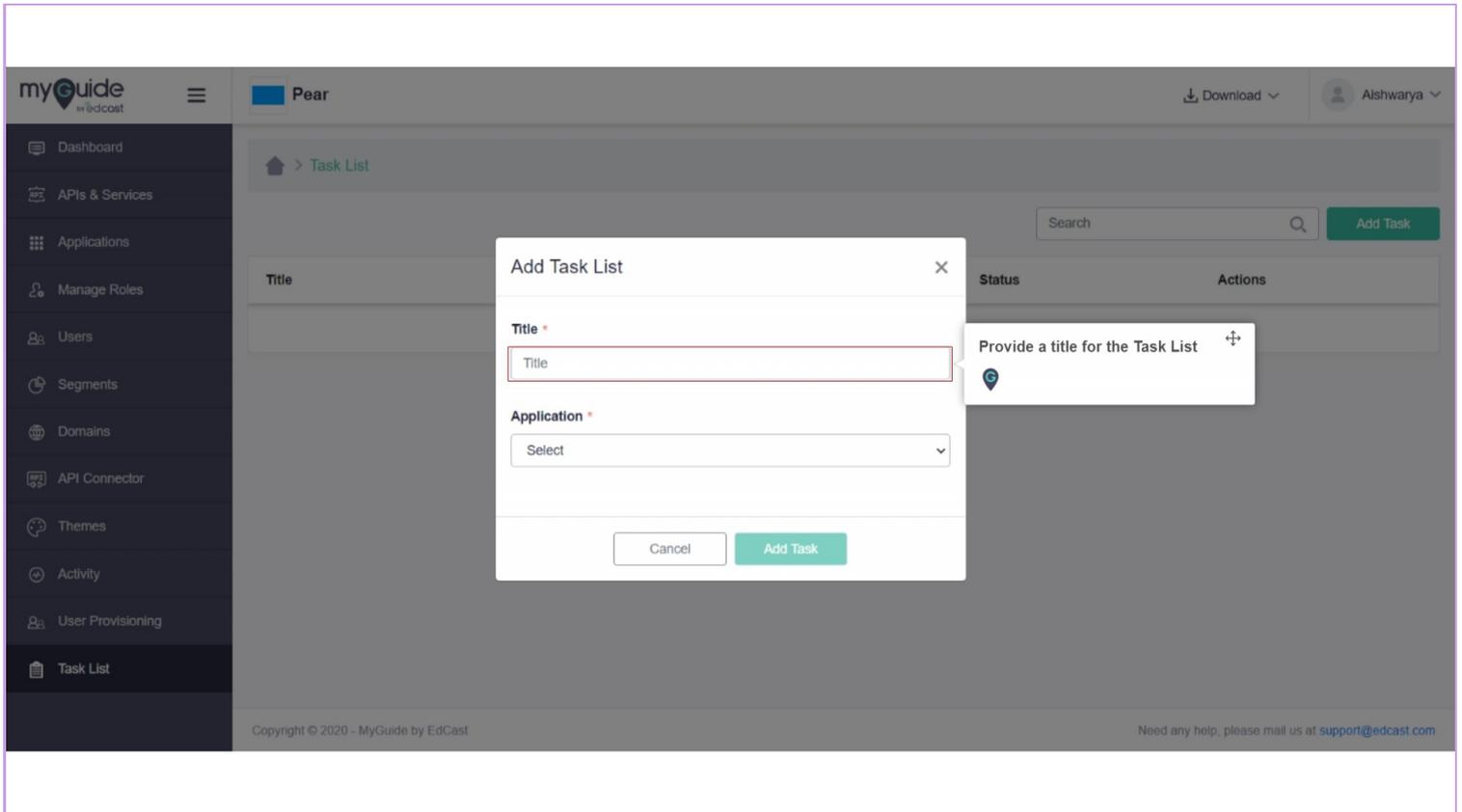
1) Click on "Add Task"

The screenshot displays the myGuide by EdCast web application interface. On the left is a dark sidebar menu with options: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List (highlighted). The main content area is titled 'Pear' and contains a breadcrumb 'Task List'. A table with columns 'Title', 'Application', 'Leaderboard', 'Status', and 'Actions' is shown, with the message 'No Data Found' in the center. A green 'Add Task' button is located in the top right corner of the table area. A white callout box with a location pin icon and the text 'Click on "Add Task"' points to this button. The footer contains copyright information and a support email address.

Title	Application	Leaderboard	Status	Actions
No Data Found				

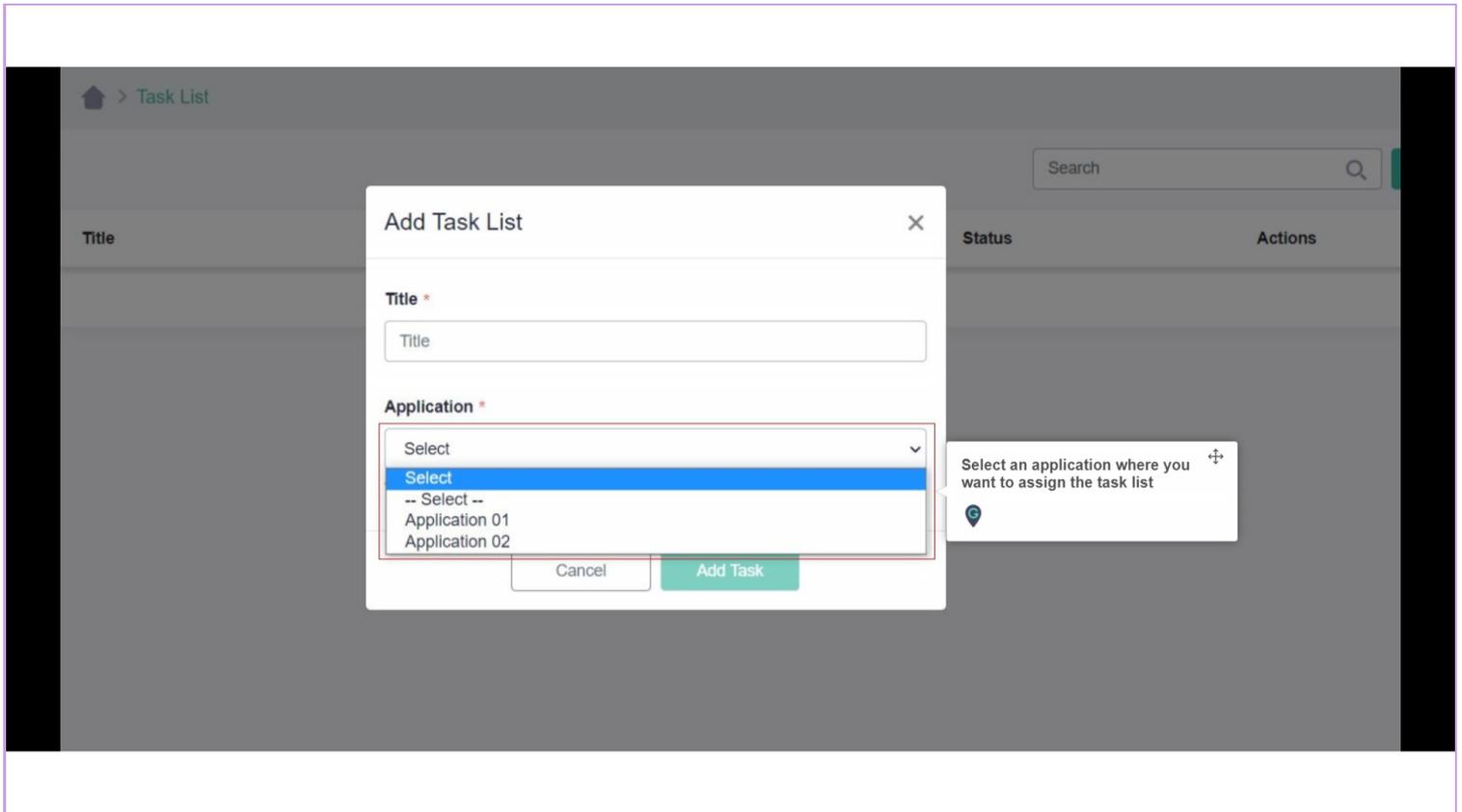
# Step: 06

1) Provide a title for the Task List



## Step: 07

1) Select an application where you want to assign the task list



## Step: 08

1) Click on "Add Task"

The screenshot displays the myGuide by EdCast web application interface. The user is logged in as 'Aishwarya' and is viewing the 'Task List' page. A modal window titled 'Add Task List' is open, allowing the user to create a new task. The modal contains the following fields:

- Title \***: A text input field containing 'LXP On Boarding'.
- Application \***: A dropdown menu currently set to 'Application 02'.

At the bottom of the modal, there are two buttons: 'Cancel' and 'Add Task'. The 'Add Task' button is highlighted with a red border. A callout box with a location pin icon points to the 'Add Task' button, containing the text 'Click on "Add Task"'. The background interface shows a sidebar with navigation options like Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The top navigation bar includes the myGuide logo, a user profile icon, and a 'Download' button. The footer contains copyright information: 'Copyright © 2020 - MyGuide by EdCast' and a support email: 'Need any help, please mail us at support@edcast.com'.

## Step: 09

Admins can set the visibility rules for the task lists so users can see them only on the configured URLs.

1) Click this eye icon to set the visibility rules for this Task List

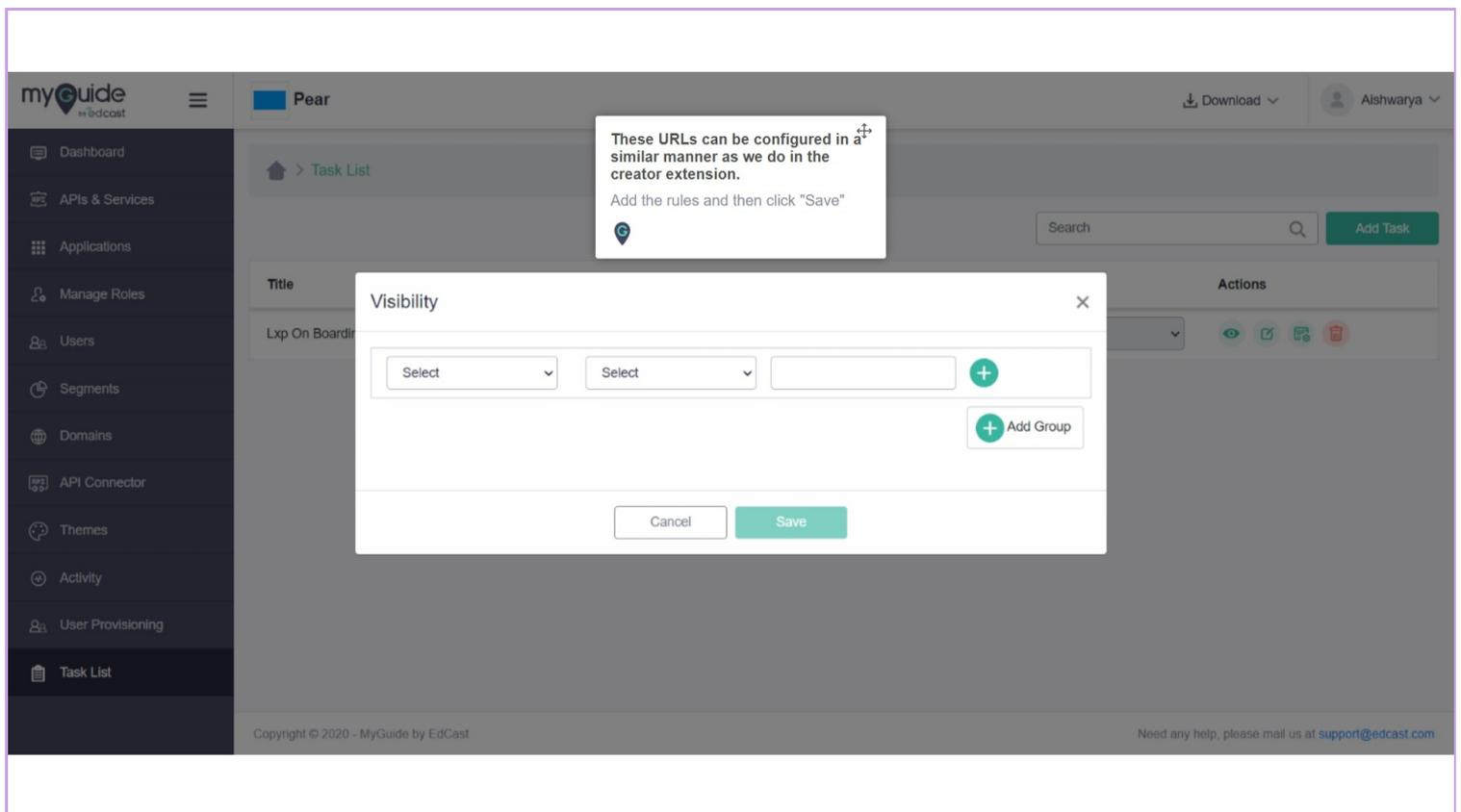
The screenshot shows the 'myGuide by edcast' interface. The top navigation bar includes the logo, a user profile for 'Pear', and a 'Download' button. The left sidebar lists various system components, with 'Task List' selected. The main area shows a 'Task List' page with a search bar and an 'Add Task' button. A table lists task lists, with one entry 'Lxp On Boarding' under 'Application 02'. The 'Actions' column for this entry contains an eye icon, which is highlighted by a tooltip. Another tooltip explains that admins can set visibility rules for task lists to restrict access to specific URLs. The footer contains copyright information and a support email address.

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02	0		   

## Step: 10

These URLs can be configured in a similar manner as we do in the creator extension.

Add the rules and then click "Save"



The screenshot displays the myGuide by edcast user interface. A dark sidebar on the left contains navigation items: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area shows a 'Task List' page with a search bar and an 'Add Task' button. A 'Visibility' dialog box is open in the foreground, featuring two dropdown menus labeled 'Select', a text input field, a green '+' button, and an 'Add Group' button. Below the dialog are 'Cancel' and 'Save' buttons. A tooltip above the dialog reads: 'These URLs can be configured in a similar manner as we do in the creator extension. Add the rules and then click "Save"'. The footer includes 'Copyright © 2020 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

# Step: 11

1) If you want to update the name or change the application, click this edit button

The screenshot displays the 'myGuide by edcast' web application interface. The top navigation bar includes the logo, a menu icon, the user name 'Pear', a 'Download' dropdown, and the user profile 'Aishwarya'. The left sidebar contains various navigation options, with 'Task List' selected. The main content area shows a 'Task List' table with the following data:

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02	0	Unpublish	

A tooltip is positioned over the edit icon (pencil) in the Actions column, containing the text: "If you want to update the name or change the application, click this edit button". The footer of the page includes the copyright notice "Copyright © 2020 - MyGuide by EdCast" and the support email "support@edcast.com".

# Step: 12

1) Click here to manage content and add guides inside the Task List

The screenshot displays the myGuide by edcast dashboard. The left sidebar contains a menu with items: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List (highlighted). The main content area shows the 'Task List' page for the 'Pear' application. It includes a search bar, an 'Add Task' button, and a table with the following data:

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02	0		

At the bottom of the page, there is a footer with the text: 'Copyright © 2020 - MyGuide by EdCast' and 'Need any help, please mail us at [support@edcast.com](mailto:support@edcast.com)'.

## Step: 13

Administrators manage the adding and removing of guides, and they can add folders to put guides in task lists from this section.

Only published guides that belong to published folders appear here.

1) Click on "Manage Guides"

The screenshot displays the MyGuide by EdCast user interface. The top navigation bar includes the logo, a menu icon, the user name 'Pear', and a 'Download' button. The left sidebar lists various system components, with 'Task List' selected. The main content area shows the breadcrumb path 'Dashboard > Task List > Manage Content'. Below this, there are filters for 'Task List: LXP On Boarding' and 'Application: Application 02'. Two buttons, 'Manage Guides' and 'Add Folder', are visible. Two callout boxes provide instructions: one points to the 'Manage Guides' button with the text 'Administrators manage the adding and removing of guides, and they can add folders to put guides in task lists from this section. Only published guides that belong to published folders appear here.', and another points to the same button with the text 'Click on "Manage Guides"'. The footer contains copyright information and a support email address.

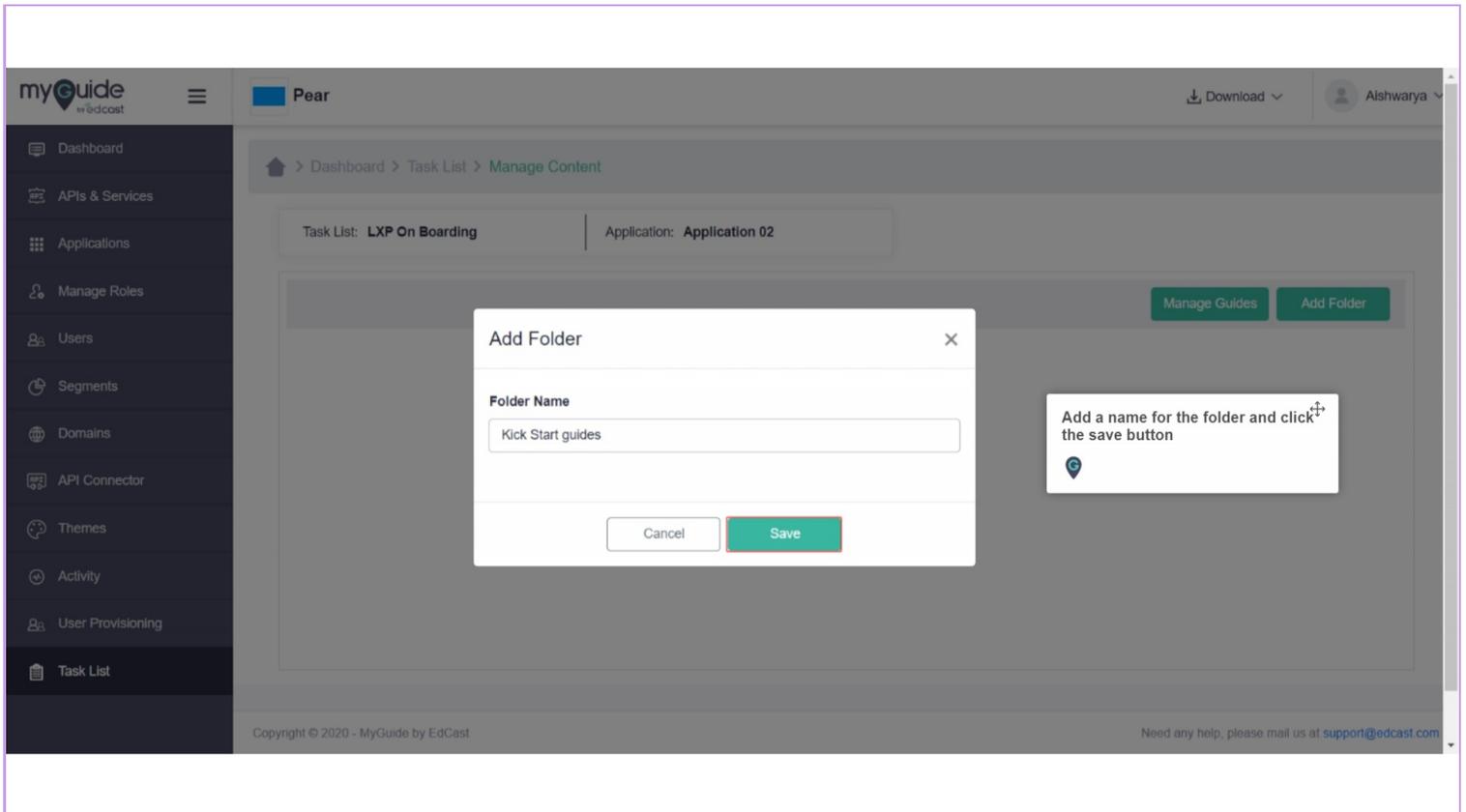
## Step: 14

Or, you can add a folder, and then add guides to it

The screenshot displays the myGuide by EdCast web application interface. The top navigation bar includes the myGuide logo, a user profile for 'Pear', and a 'Download' button. The left sidebar lists various system components, with 'Task List' selected. The main content area shows the 'Manage Content' page for 'Task List: LXP On Boarding' within 'Application: Application 02'. Two buttons, 'Manage Guides' and 'Add Folder', are visible. A tooltip message is overlaid on the right side of the page, stating: 'Or, you can add a folder, and then add guides to it'. The footer contains copyright information for 2020 and a support email address: support@edcast.com.

## Step: 15

Add a name for the folder and click the save button



The screenshot displays the myGuide by EdCast web application interface. The top navigation bar includes the myGuide logo, a user profile for 'Pear', and a 'Download' button. The left sidebar contains a menu with options: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area shows a breadcrumb trail: Dashboard > Task List > Manage Content. Below this, there are filters for 'Task List: LXP On Boarding' and 'Application: Application 02'. A modal dialog titled 'Add Folder' is open, featuring a text input field with the placeholder text 'Kick Start guides', a 'Cancel' button, and a 'Save' button. A callout box with a location pin icon contains the text: 'Add a name for the folder and click the save button'. The footer of the page includes the copyright notice 'Copyright © 2020 - MyGuide by EdCast' and a support email address 'support@edcast.com'.

## Step: 16

# You can add more folders as per requirement

1) Click here to manage and add guides

The screenshot shows the 'myGuide by edcast' interface. The left sidebar contains a navigation menu with items like Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Manage Content' and shows a breadcrumb trail: Dashboard > Task List > Manage Content. Below the breadcrumb, there are two fields: 'Task List: LXP On Boarding' and 'Application: Application 02'. A folder named 'Kick Start guides' is listed. A callout box points to the 'Add Folder' button with the text 'You can add more folders as per requirement'. Another callout box points to the 'Manage Guides' button with the text 'Click here to manage and add guides'. The footer contains copyright information: 'Copyright © 2020 - MyGuide by EdCast' and a support email address: 'Need any help, please mail us at [support@edcast.com](mailto:support@edcast.com)'.

## Step: 17

Only published guides that belong to published folders appear here.

- 1) Select the respective checkbox for the guides you want to add to the Task list
- 2) Search the name of a particular guide from here
- 3) Click on "Save", once done

The screenshot displays the 'myGuide by edcast' interface. A 'Manage Guides' modal window is open, showing a search bar and a list of guides. The 'Save' button is highlighted in green. Callout boxes provide instructions: 'Select the respective checkbox for the guides you want to add to the Task list', 'Search the name of a particular guide from here', and 'Click on "Save", once done'. A note at the top right states 'Only published guides that belong to published folders appear here.'

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# Step: 18

1) Once you have added the guides, click this downward arrow

The screenshot displays the myGuide by edcast user interface. On the left is a dark sidebar with a menu containing items like Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Pear' and shows a breadcrumb path: Dashboard > Task List > Manage Content. Below this, there are filters for 'Task List: LXP On Boarding' and 'Application: Application 02'. A green 'Add Folder' button is in the top right of the content area. A folder named 'Kick Start guides' is listed, with a set of icons (share, refresh, delete, and a downward arrow) to its right. A white tooltip box with a red border points to the downward arrow icon, containing the text: 'Once you have added the guides, click this downward arrow'. At the bottom of the page, there is a footer with 'Copyright © 2020 - MyGuide by EdCast' on the left and 'Need any help, please mail us at [support@edcast.com](mailto:support@edcast.com)' on the right.

## Step: 19

You can see all the guides you have selected here.

1) Click "Task List" over here to go back to the home page of task lists

The screenshot shows the myGuide web interface. The top navigation bar includes the myGuide logo, a user profile for 'Pear', and a 'Download' button. The breadcrumb trail is 'Dashboard > Task List'. The main content area is titled 'Task List: LXP On Boarding' and 'Application: Application 02'. Below this, there is a section for 'Kick Start guides' with a list of tasks: 'Create Content', 'Welcome Guide', 'Update Learning Goals', 'Guide for Channel Curators', 'Assign Content', and 'Sharing a SmartCard'. Two callout boxes are present: one pointing to the 'Task List' breadcrumb with the text 'Click "Task List" over here to go back to the home page of task lists', and another pointing to the list of guides with the text 'You can see all the guides you have selected here.'.

# Step: 20

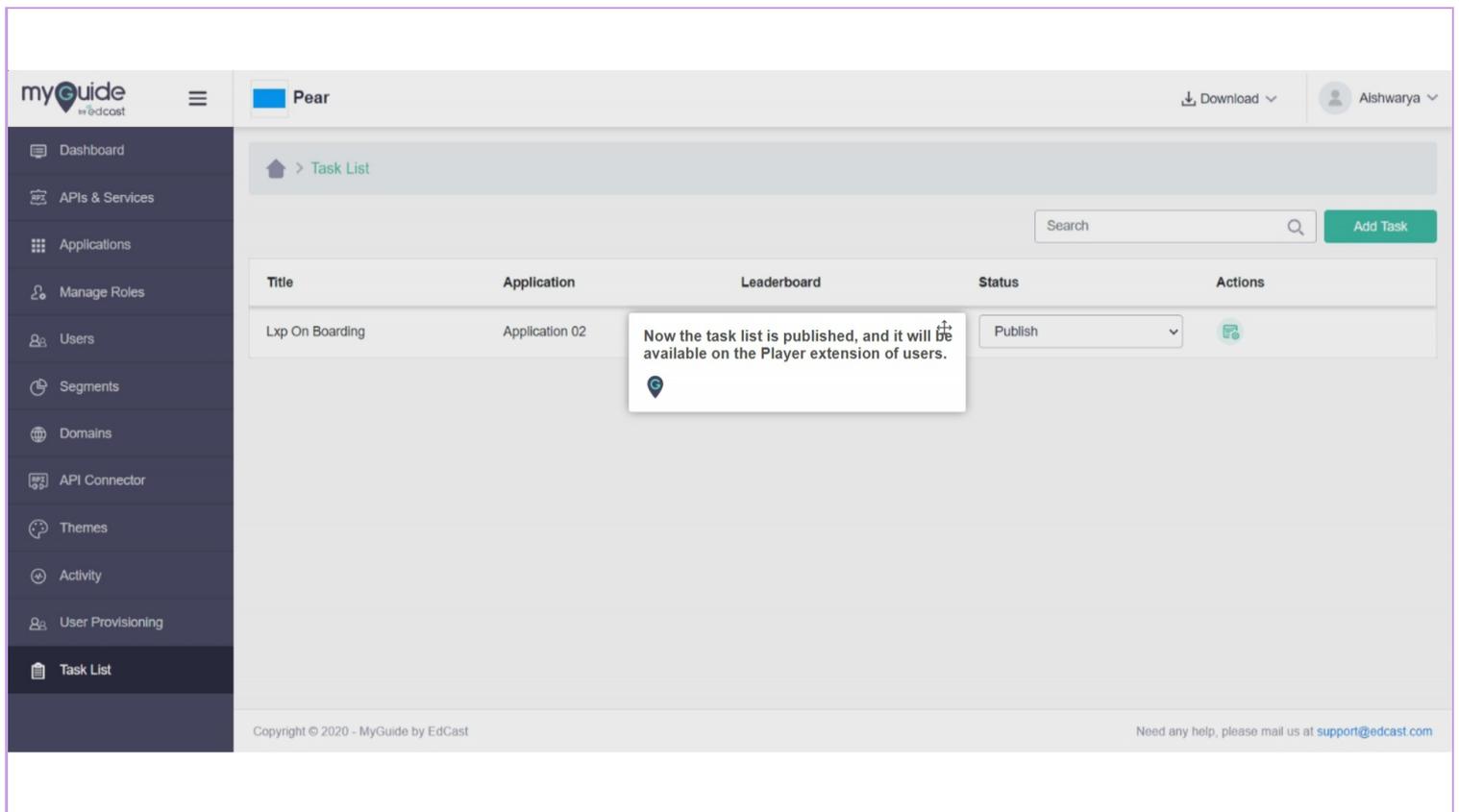
1) From the status section select "Publish"

The screenshot shows the MyGuide by EdCast web application interface. The top navigation bar includes the logo, a hamburger menu, the user name 'Pear', a 'Download' button, and the user profile 'Aishwarya'. The left sidebar contains various navigation options, with 'Task List' selected. The main content area displays a 'Task List' table with columns for Title, Application, Leaderboard, Status, and Actions. A tooltip points to the 'Status' dropdown menu, which is open and shows 'Unpublish', 'Publish', and 'Unpublish' options. The 'Publish' option is highlighted. The footer contains copyright information and a support email address.

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02		Unpublish Publish Unpublish	

## Step: 21

Now the task list is published, and it will be available on the Player extension of users.



The screenshot displays the myGuide by edcast web application interface. The top navigation bar includes the myGuide logo, a menu icon, the user name 'Pear', a 'Download' button, and a user profile dropdown for 'Aishwarya'. The left sidebar contains a navigation menu with items: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List (which is highlighted). The main content area shows a breadcrumb trail for 'Task List', a search bar, and an 'Add Task' button. Below this is a table with the following structure:

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02	Now the task list is published, and it will be available on the Player extension of users.	Publish	

At the bottom of the page, there is a copyright notice: 'Copyright © 2020 - MyGuide by EdCast' and a support link: 'Need any help, please mail us at [support@edcast.com](mailto:support@edcast.com)'.

## Step: 22

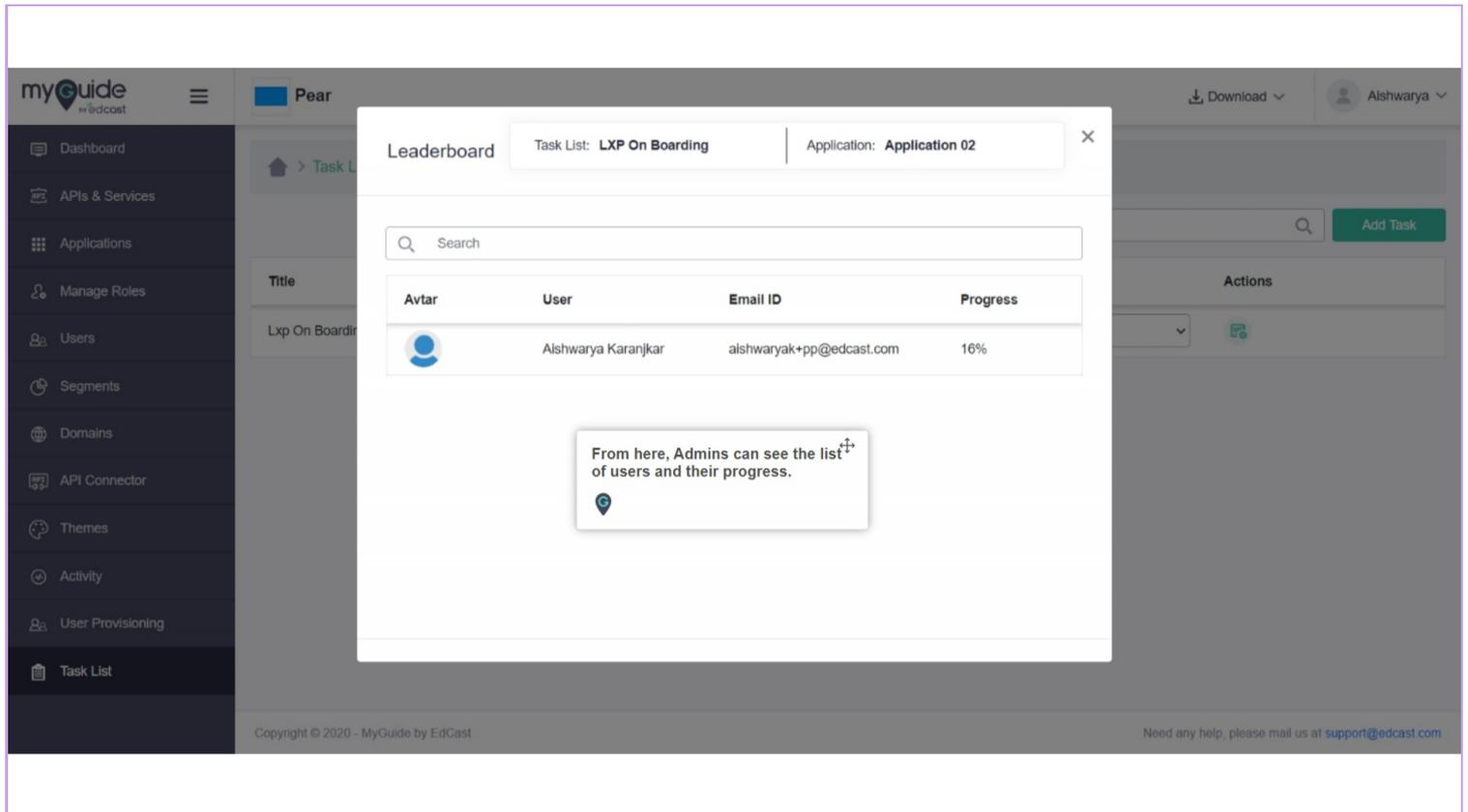
1) To check the progress of the users, click this icon below the Leaderboard section

The screenshot displays the myGuide by edcast user interface. On the left is a dark sidebar with navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List (highlighted). The main content area is titled 'Pear' and contains a 'Task List' section. At the top right of this section are a search bar and an 'Add Task' button. Below is a table with columns: Title, Application, Leaderboard, Status, and Actions. The first row shows 'Lxp On Boarding' under Title, 'Application 02' under Application, a 'Leaderboard' icon with a '1' (highlighted by a red box) under Leaderboard, 'Publish' under Status, and a green icon under Actions. A callout box points to the 'Leaderboard' icon with the text: 'To check the progress of the users, click this icon below the Leaderboard section'. The footer contains 'Copyright © 2020 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02		Publish	

## Step: 23

From here, Admins can see the list of users and their progress.



The screenshot shows the 'myGuide by edcast' interface. A 'Leaderboard' modal window is open, displaying a table of users and their progress. The modal title is 'Leaderboard' and it shows 'Task List: LXP On Boarding' and 'Application: Application 02'. The table has the following data:

Avatar	User	Email ID	Progress
	Aishwarya Karanjkar	aishwaryak+pp@edcast.com	16%

A callout box with a cursor icon points to the table, containing the text: 'From here, Admins can see the list of users and their progress.'

# Step: 24

1) If you want to delete this Task list, click here

The screenshot shows the 'myGuide by edcast' dashboard. The left sidebar contains navigation options: Dashboard, APIs & Services, Applications, Manage Roles, Users, Segments, Domains, API Connector, Themes, Activity, User Provisioning, and Task List. The main content area is titled 'Pear' and shows a 'Task List' section. A table lists tasks with columns for Title, Application, Leaderboard, Status, and Actions. The first task is 'Lxp On Boarding' under 'Application 02'. The 'Actions' column for this task includes an 'Unpublish' dropdown, a toggle, a refresh icon, and a delete icon (trash can) which is highlighted with a red box. A tooltip points to the delete icon with the text: 'If you want to delete this Task list, click here'. The footer contains copyright information and a support email address.

Title	Application	Leaderboard	Status	Actions
Lxp On Boarding	Application 02	0	Unpublish	

# Thank you

[myguide.org](https://myguide.org)