My Focus

Task Management Internal Trainer Guide

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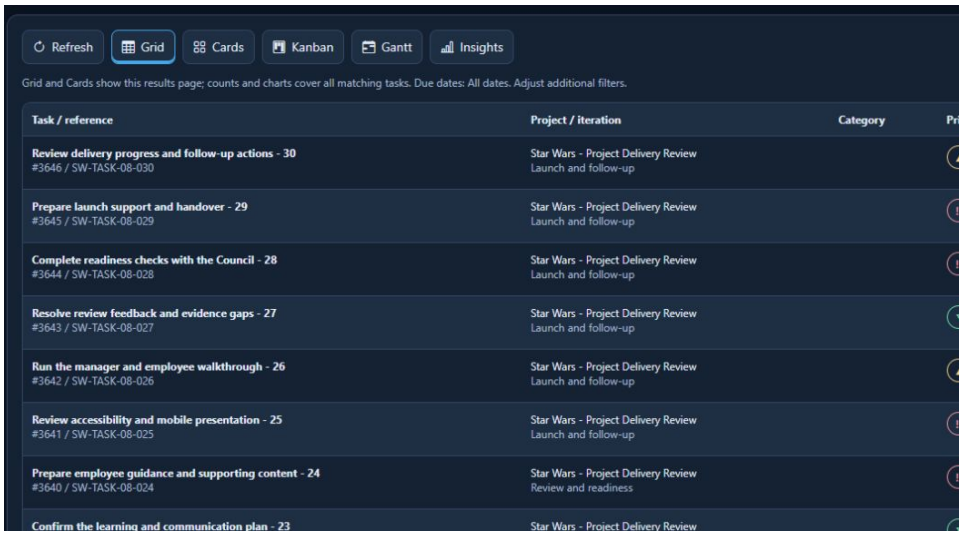
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1. Prepare the session

Teach users to find their next task, interpret filtered views and open the authoritative record. Separate advisory planning from permitted task updates.

Use thirty minutes: three for purpose/access, twelve for the walkthrough, five for configuration, five for practice and five for questions. Dates and presenters are undecided. This is Coming Soon material; At Launch copy remains held.



Task and project excerpt with fictional Star Wars work.

Prerequisites: normal signed-in user with intended module and record scope, verified fictional starting record and current deck. Keep configuration explanation separate from the employee demo. Never share credentials or real records.

2. Run the demonstration

1. Confirm personal or manager/HR scope and date/filter summary.
2. Compare Grid, Cards, Kanban and Gantt without saving.
3. Open a task and explain description, people, dates and document context.
4. Explain project/phase navigation and separate delivery/time/finance rights.

Start at Modules/TaskManagement/Pages/HRF_TASK_DASHBOARD.aspx. Rehearse with the intended ordinary persona. Explain what is visible, why it matters and which native action follows. Stop before a write unless separately authorised.

Ask why a KPI total can exceed the grid page. Expected result: the learner explains all-matching scope, current page and active criteria.

Record unanswered questions with screen, role, expected behaviour and a privacy-safe symptom. Use the normal reviewed support/knowledge process later. This pack sends no messages.

3. Explain administration and limits

Modules/TaskManagement/Lookups/HRF_TASK_MANAGEMENT_SETTINGS.aspx requires exact ADMINISTRATOR membership. Keep feature gates, project ownership/administration and ordinary scope separate.

Task 52 has newer successful local read/native PDF evidence and cross-task denial. Business writes and target concurrency remain unproven. Appearance fixtures do not accept saves, recurrence, notifications or exports.

Control or prerequisite	Use and boundary
Can every user see this	Explain actual licence, settings, group/menu rights and record scope.
Does opening it complete work	Viewing, saving, submitting, approving and external processing are separate actions.
Does a screenshot prove acceptance	Use relevant runtime, output and access evidence for each claim.

Refer to the matching user/configuration guides in ../11_Manuals. Keep UAT/deployment decisions with their owners. Master sales/QA deck comparison remains outstanding; do not claim complete alignment without reviewing that master.

4. Hand over to the consultant

Control or prerequisite	Use and boundary
Current editable deck	../01_Presentation/MyFocus_Task_Management_Overview_Final_v1.pptx
Matching narration	../02_Synthesia_Narration/Brendan_2026-10-18_Task_Management_Video_Script.txt
Reviewed captures	../05_Product_Visuals and relevant ../09_Additional_Content when present.
User and configuration guides	../11_Manuals/Task_Management_User_Manual_2026.10.1.0 and Task_Management_Configuration_Guide_2026.10.1.0 in DOCX PDF and HTML.

Before reuse, check deck and narration editions together, open the local guide and confirm the persona sees the intended record. Use the reviewed deck as fallback. A video folder alone does not establish reviewed video availability.

Reset by clearing filters, returning to the starting route and closing unsaved editors without submission. For a separately authorised write, follow its agreed native correction/reset procedure. Do not delete records or run seed/rollback scripts from this handoff.

Hand over starting state, persona role without credentials, expected results, known limits and unanswered questions. This creates no Hub publication, meeting or release date.