Virto Kanban Board Add-in for Office 365

User and Installation Guide

Contents

System/Developer Requirements

Operating System

Microsoft Windows Server 2008, 2012

Server

- *SharePoint Release 2013 (*Microsoft Office SharePoint Server 2013; Microsoft .NET Framework 4.5)
- *Office 365.*

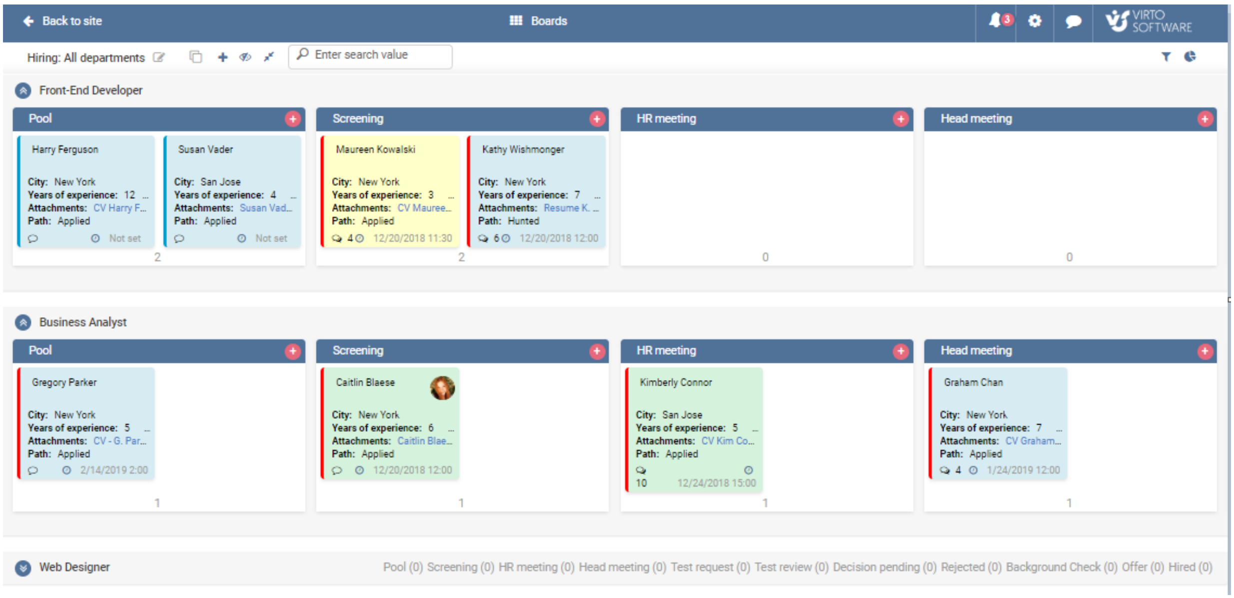
Note: *This product is not compatible with SPS 2003, SPS 2010 and WSS v2.*

Browser

Microsoft Internet Explorer, Mozilla Firefox, Opera, Google Chrome.

Virto Kanban Board for Office 365 Adjustment

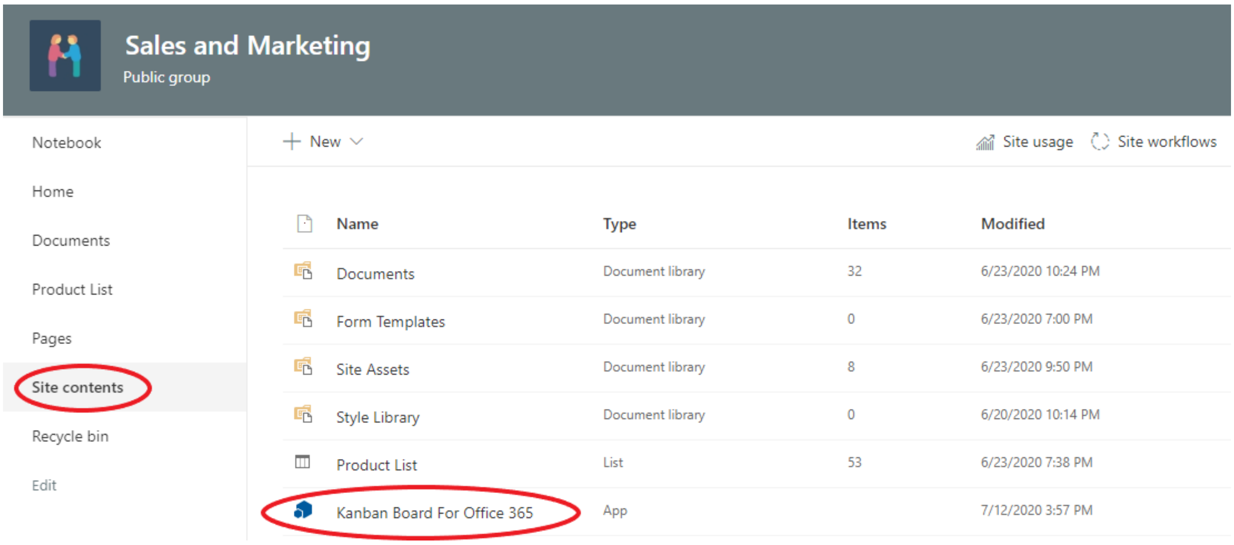
Virto SharePoint Kanban Board Add-In is a tool intended to visualize and manage tasks in SharePoint. Using this component, you can show any SharePoint lists as a Kanban Board, where cards are divided into the columns and swimlanes, usually depending on the status and showing the tasks to be done. With this visual picture of the task process, managers can quickly reveal bottlenecks and blockers of workload. Less time is spent on sorting out how projects are coming along due to the visual method of tasks management.



Installation

You can learn how to install the app from the video or in the post of our SharePoint blog.

When Virto Kanban Board Add-in for Office 365 is installed, open the "Site Contents" section of your SharePoint site, select "Kanban Board for Office 365" from the list of available apps and start using.



Click on link with app name to configure the app.

New Authorization (Coming soon)

Now the authorization process is quite different from the previous versions. The changes will be invisible to Azure App users. In other cases, you may need to do two additional steps to finalize the installation and enable full Kanban functionality to its users.

So, the first part of the installation process is the same.

Step 1

Open the SharePoint site page where you want to add the App. Switch to Edit mode and click "+" to add the App.

Step 2

Search for Virto Kanban App in the SharePoint Store and install it as you usually do (**steps 2-3** described in this blog post).

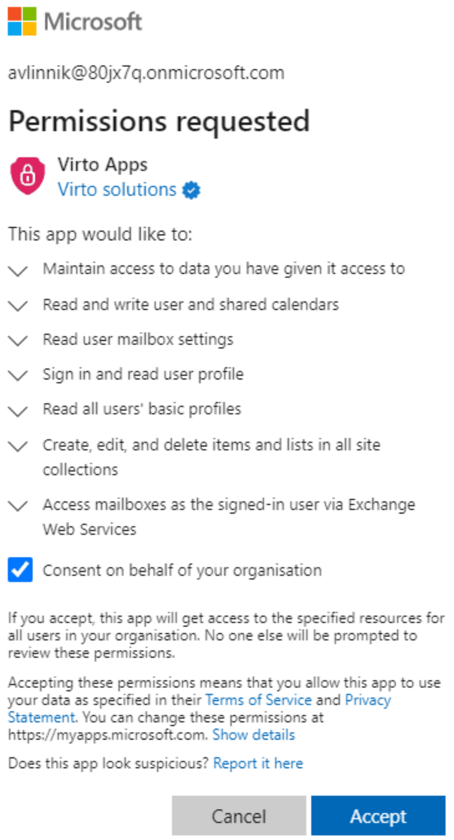
Step 3

Add installed Virto Kanban as a web part to the SharePoint site page.

Starting from here, you will see two authorization requests.

Step 4

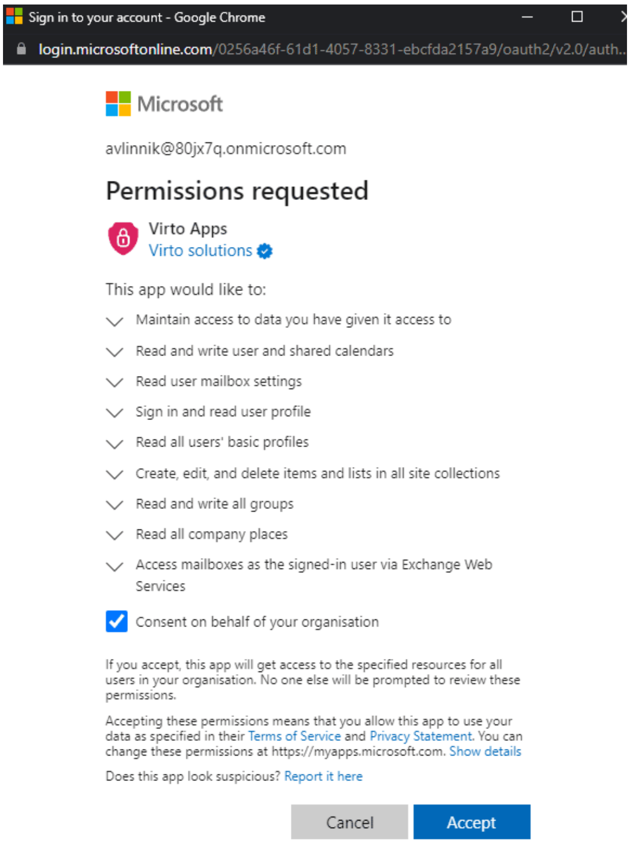
After you've added the installed App, you will see the first **Authorization message**. If you have tenant administration rights, click "**Accept**." If not — please refer to your tenant administrator to do this.



Step 5

Now go back to the Kanban settings. You will see that Virto Kanban requires additional permissions. If you have tenant administration rights, click "**Grant Required Permission**."

Then choose the "Consent on behalf of your organization" checkbox and click "Accept." If you do not have administrator privileges, please refer to your tenant administrator to do this.



After that, Virto Kanban Board will be available to tenant users with its full functionality.

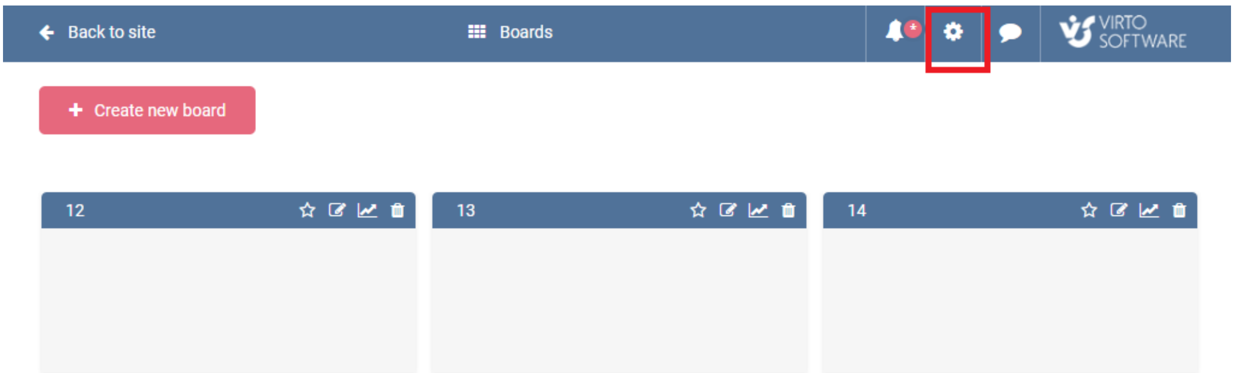
***Important note*: current Virto Kanban users may also receive the authorization request. In this case, please ask your SharePoint administrator to add the Virto Kanban application. Or, if you are the administrator, accept the request described above.**

If you need any help with Virto Kanban authorization, don't hesitate to get in touch with our support team at support@virtosoftware.com or submit a ticket.

License and Permissions

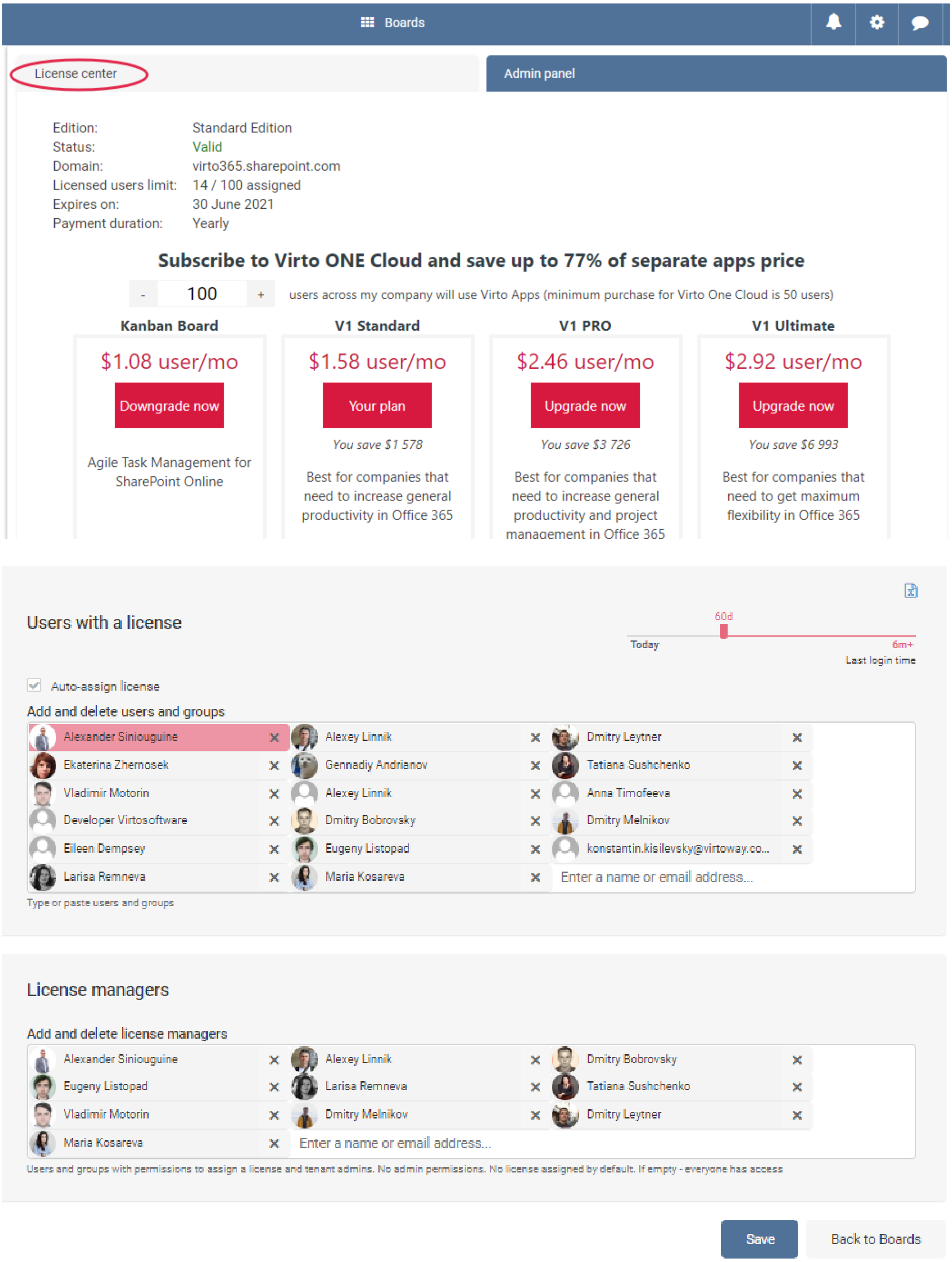
To configure license and permission settings, click the gear icon in the top left corner.

Note: *learn more about license management and permissions in the* ***Virto Kanban Board Permissions Guide***.



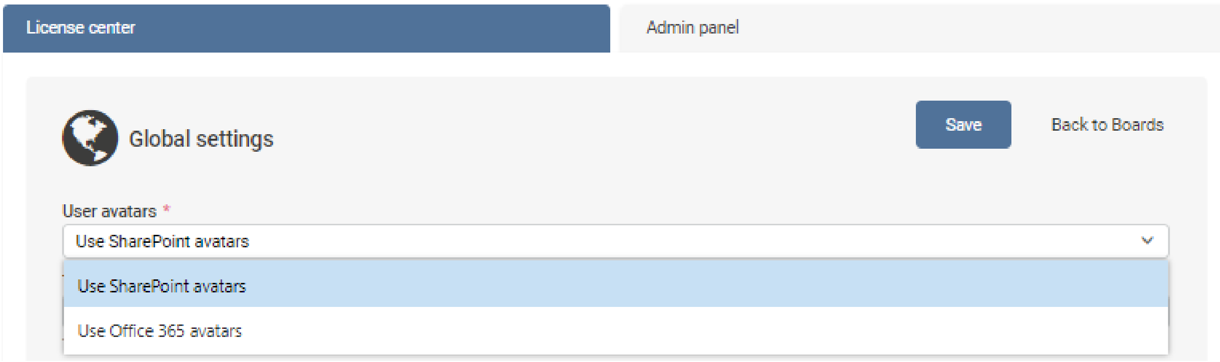
***Note**: when you install Virto Kanban App from the Office Store, 30-days free trial period is activated. If the trial period is over and you have not made a purchase yet, you can continue using Virto Kanban for free **with full functionality for 3 users**.*

In the license center you can check the status of your license and add users to the license.



You can also define the type of a user avatar displayed on Kanban boards (Office 365 avatars or

SharePoint ones). Open the "Admin Panel" and select the type you need in the dropdown.



There you can select users allowed to edit Kanban Settings. If external users have access to your SharePoint site collection, you can also add them by typing their full email addresses.

There are 3 roles in the Virto Kanban Board App:
- License Manager;
- Board admin;
- A user with default or defined board permissions.

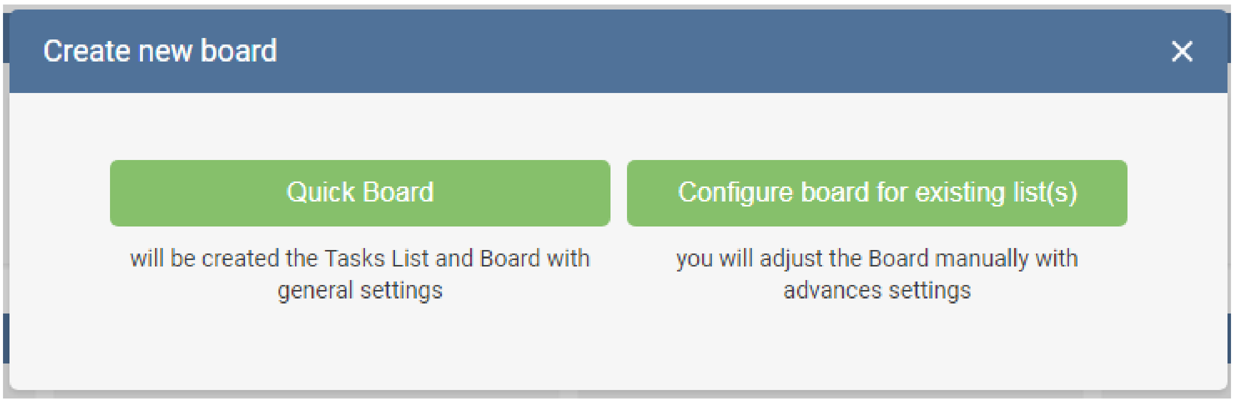
You can find the description of every role in the **Virto Kanban Board Permissions Guide**.

Then you can return to the previous page and create a new board or choose an existing board to edit it.

Boards Page

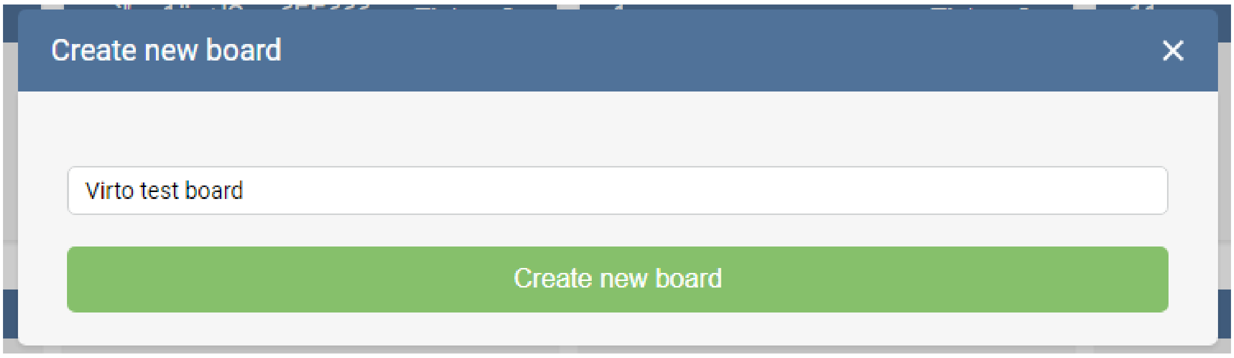
All existing boards from current site collection will be displayed on the boards page.
There you can adjust an existing board or create a new one.

If you have no previously configured boards on this page, you will be offered to create a new board with a new list or configure an existing list.

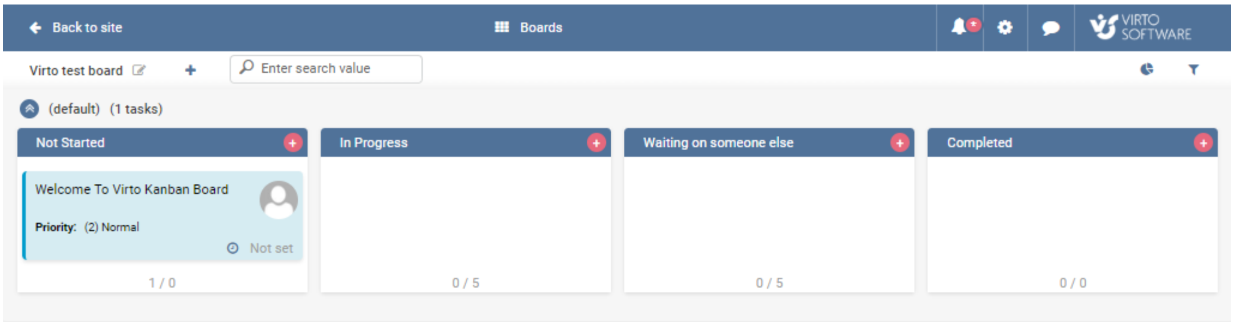


Creating a Quick Board

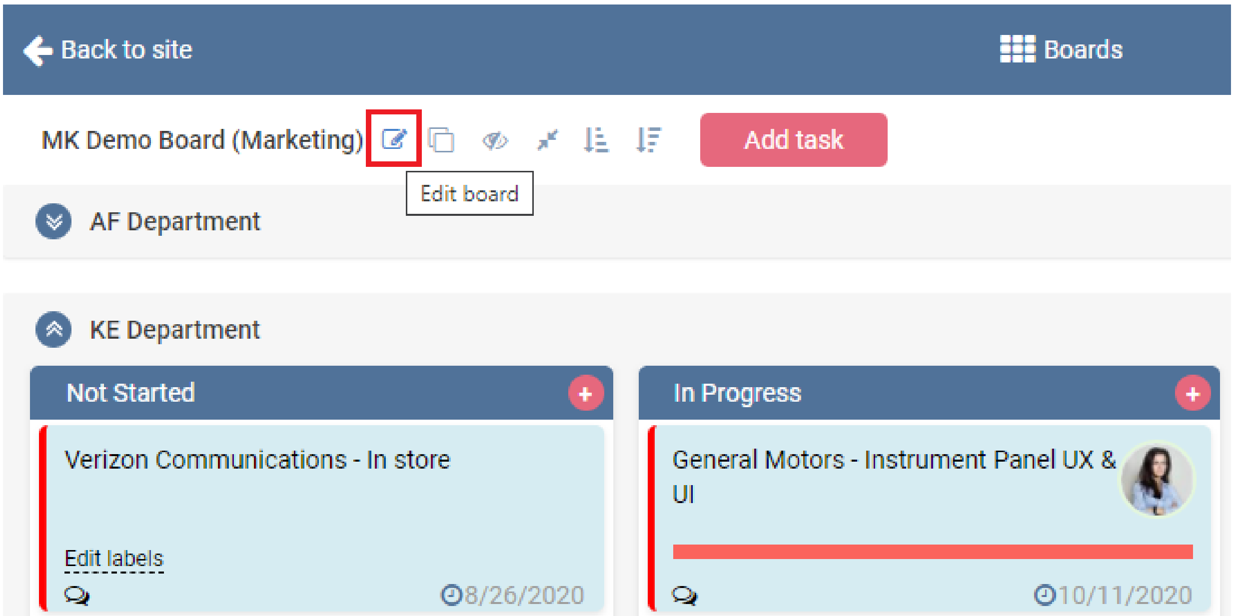
To create a new board quickly with "Quick board" feature, type a board name and customize it later.



The list with the same name will be created. You can see the test task and default set of columns. You can adjust this board by clicking Edit icon next to the board name.

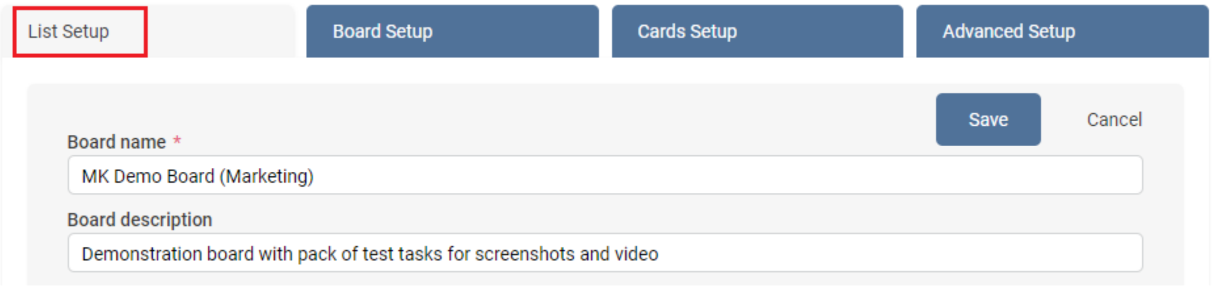


The second option is to configure an existing list. Click “Edit board” to start.



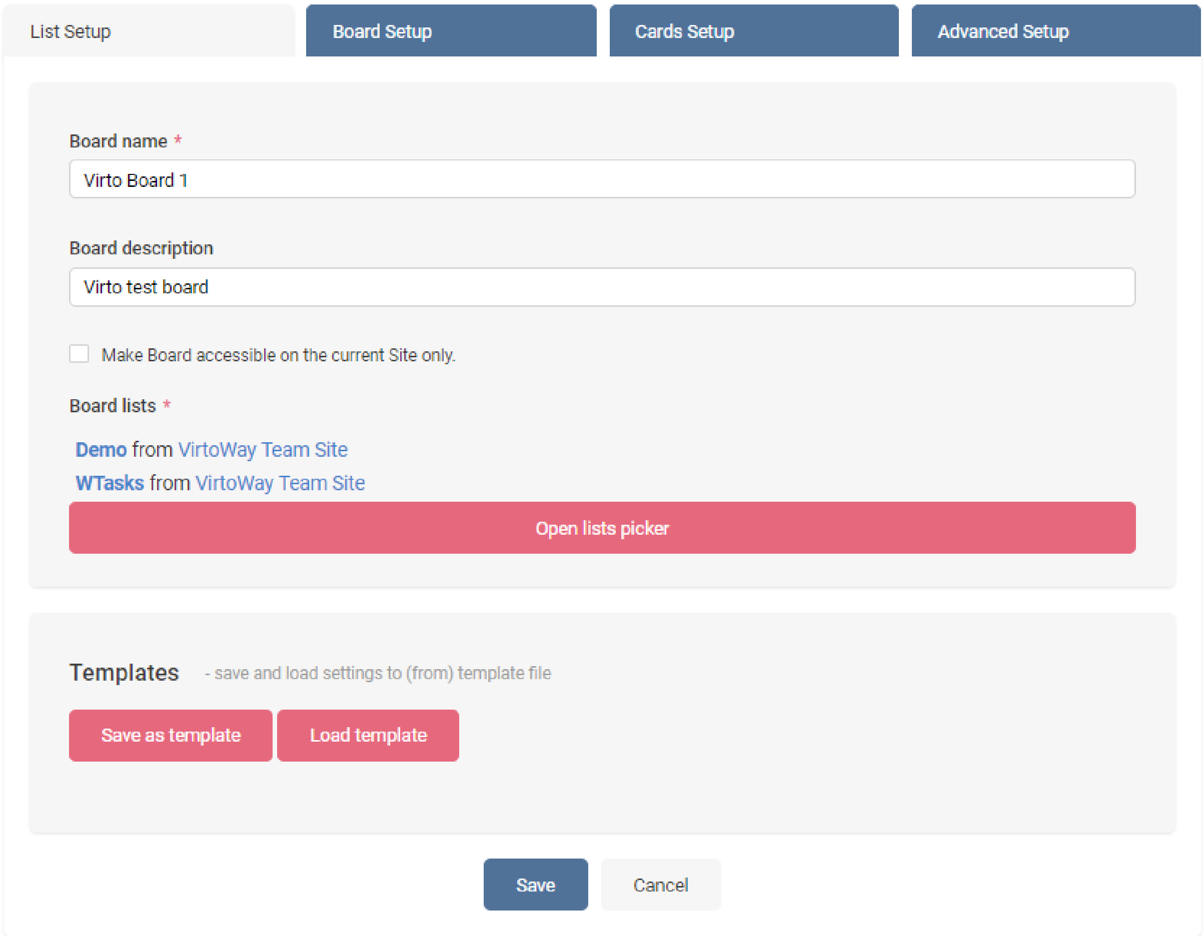
List Setup

Start creating and adjusting a new board in the list setup tab.



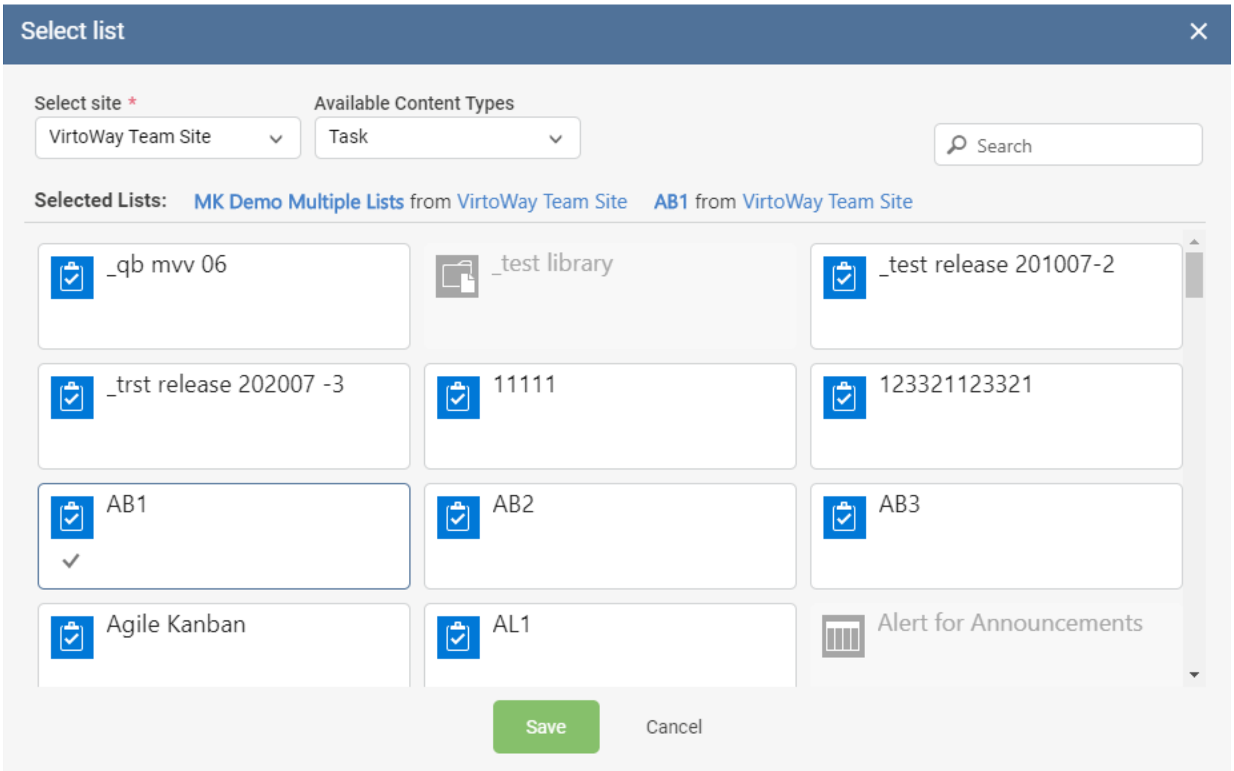
Add New Board

Type a board name, add a description (optionally), and click lists picker to select SharePoint list(s) from the site collection, which contain the data you will display on the Kanban board.



Choose a List

List picker allows you to choose several lists with the same content type to display on Kanban board. The dropdown menu contains the current site collection's sites and subsites.



Fields and Content Types

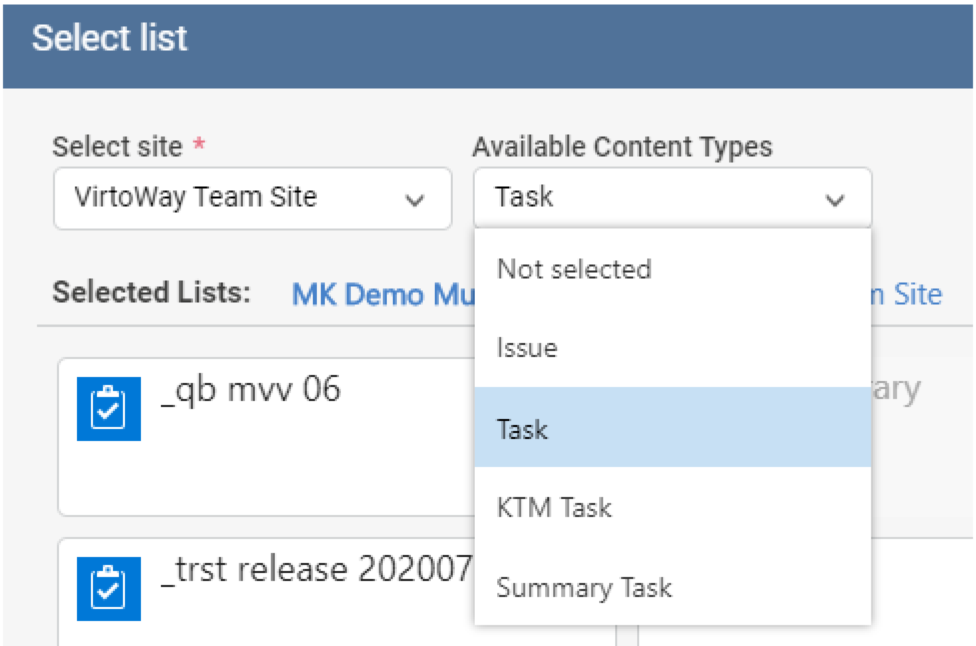
To adjust the board correctly, it is required to know how the fields of different types correspond to future board card fields. This is especially important, when you need to merge multiple lists in a single board.

Available Content Types dropdown allows you to select the lists containing the chosen content type. The "**Task**" content type is the most appropriate for the Kanban board and usually contains all fields required for a board creating.

However, you should check the set of fields of the source list before choosing it (it will be unavailable in the list picker in case it does not contain the required fields). A SharePoint list used as a source for a Kanban board must have at least one "**Choice" field** and a "**User" field**. The choice field is used for displaying swimlanes and the user fields will let you assign users.

To use swimlanes, you check that the SharePoint list contains fields with several values, such as **"Choice", "Multichoice", "User", "Lookup", "Boolean"**, etc.

To have an ability of adding comments, check for a "**Multiple Lines of Text**" type column. This field will be used for keeping comments in the list.



***Note**: you can use a library as a Kanban source, where library files are presented as Kanban cards. The library must have at least one choice field to be used for the set of swimlanes.*

The table below shows the list columns compatibility. These columns taken from 2 or more SharePoint lists can be merged and used as:
- Kanban columns;
- Kanban swimlanes;
- required fields for a board (such as Task Title field)

For example, if List 1 is a Task list and has the “Assigned to” field renamed to the “Users” field and List 2 is a custom list with the “Created by” field renamed to the “Users” field, this field “Users” will be available on a board as a column or swimlane when both lists are merged.

If List 1 has the “Assigned To” field and its copy “Copy of list 2” list has the renamed field “Assigned Users”, these fields will be available to edit and displayed on the Kanban Board, but you can’t use them as columns or swimlanes.

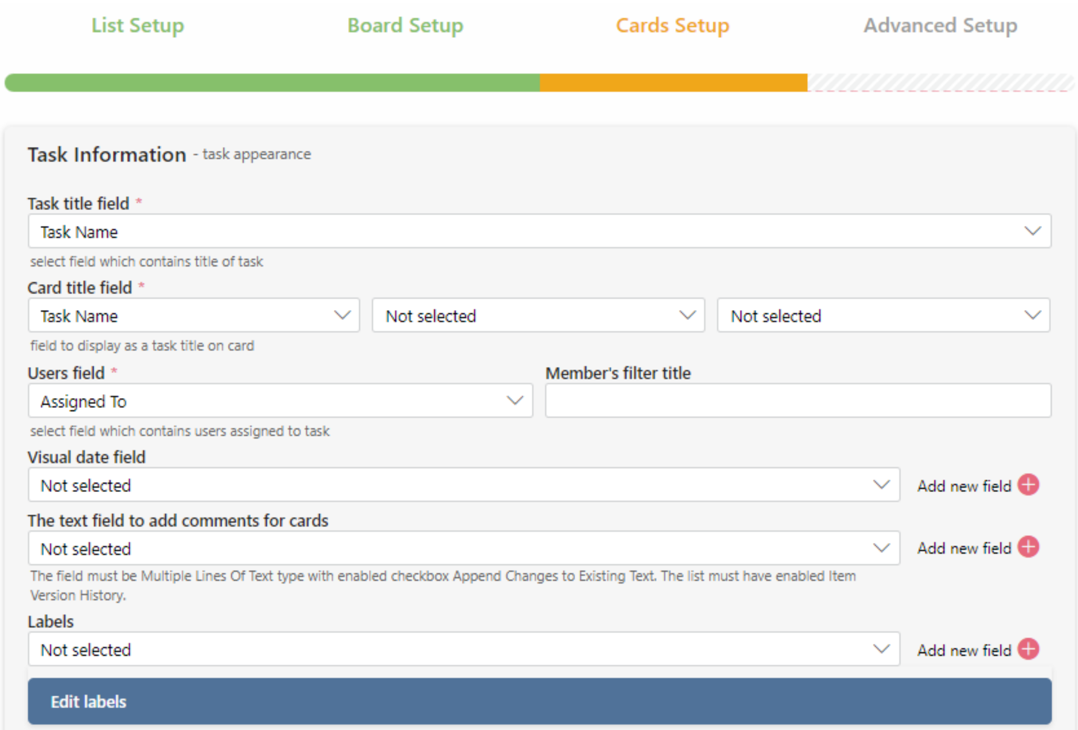
List1				List 2				Available to overlay
Field Title	Field Type	Field Internal Name	Content Type	Field Title	Field Type	Field Internal Name	Content Type	+ yes - not
Title1	Text	Title	Task	Title1	Text	Title1	Task	+
Title1	Text	Title1	Task	Title1	Text	Title1	Custom	+
Title1	Text	Title1	Task	Title1	Text	Title	Task	+
Title1	Text	Title1	Task	Title1	Text	Title	Custom	+
Title1	Text	Title1	Task	Title1	Number	Title1	Task	-
Title	Text	Title1	Task	Title1	Text	Title1	Task	-

***Note**: if you’re changing the fields applied for the board and the new values do not appear, open the board settings (“Edit”) and click “Save” one more time. This will let you to update the cash data on the server and apply the changed settings.*

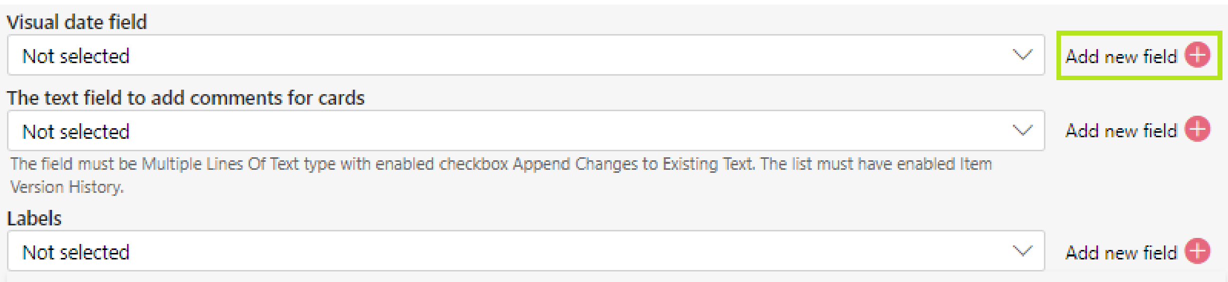
Adding Fields to Custom List

Kanban Board App for Office 365 allows adding fields to a custom list, when you're creating a board from an existing list.

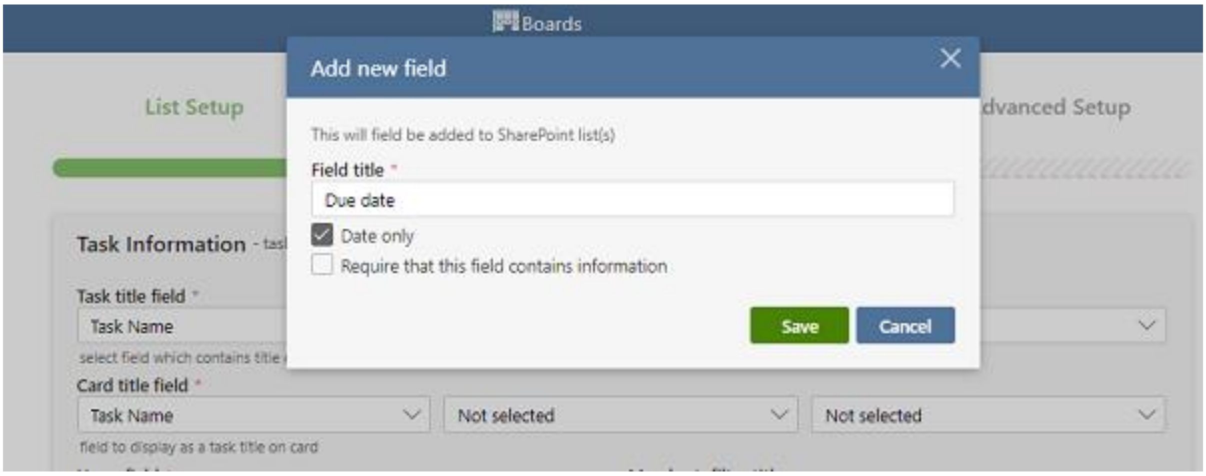
Start creating a list and choose "Create a board for existing list(s)". Choose a list from your SharePoint site in the list picker. When you have chosen a list and switched to the "Task Information" step, take a look at the fields. Some of them are already chosen, and some of them are not selected.



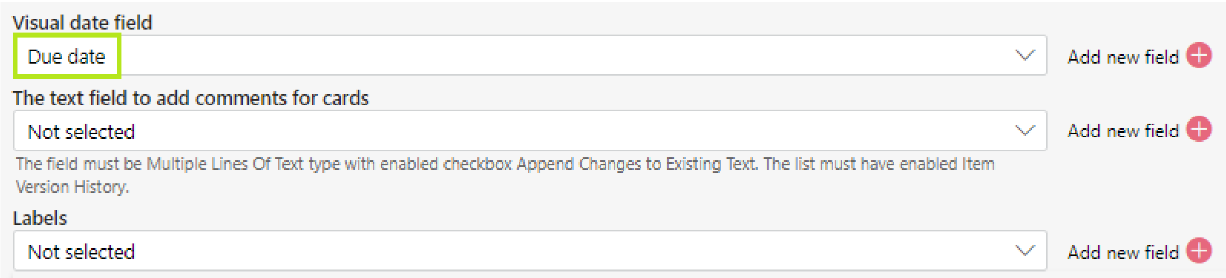
You should choose the following fields: the visual date field, a text field for comments, and labels field. And in case the list does not contain an appropriate field, just click "**Add new field**" next to it. No need to navigate to the list settings and add fields. You're creating a board and adding the required fields right here and at this very moment.



Specify the name for your field and save it. Choose the checkbox "Require that this field contains information" if you need it.



The added field appears. Do the same actions for other fields, if necessary. For example, in the same way you can create fields of multi-choice type for comments and labels.

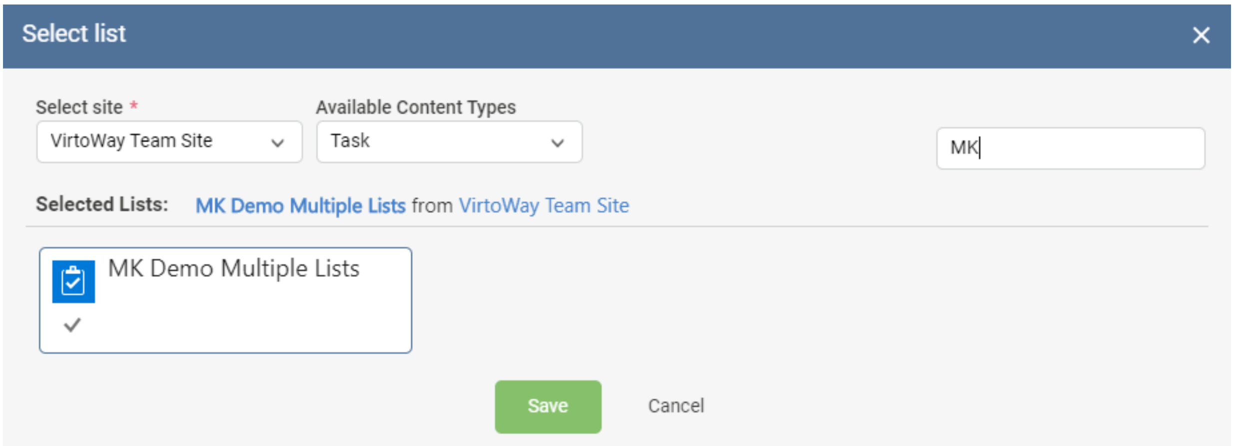


The option of adding fields is available for all users with the right of creating fields.

***Note**: make sure you have enabled the version history for the list you've chosen. Or otherwise, choose the checkbox to enable it. The version history is required for the comment field.*

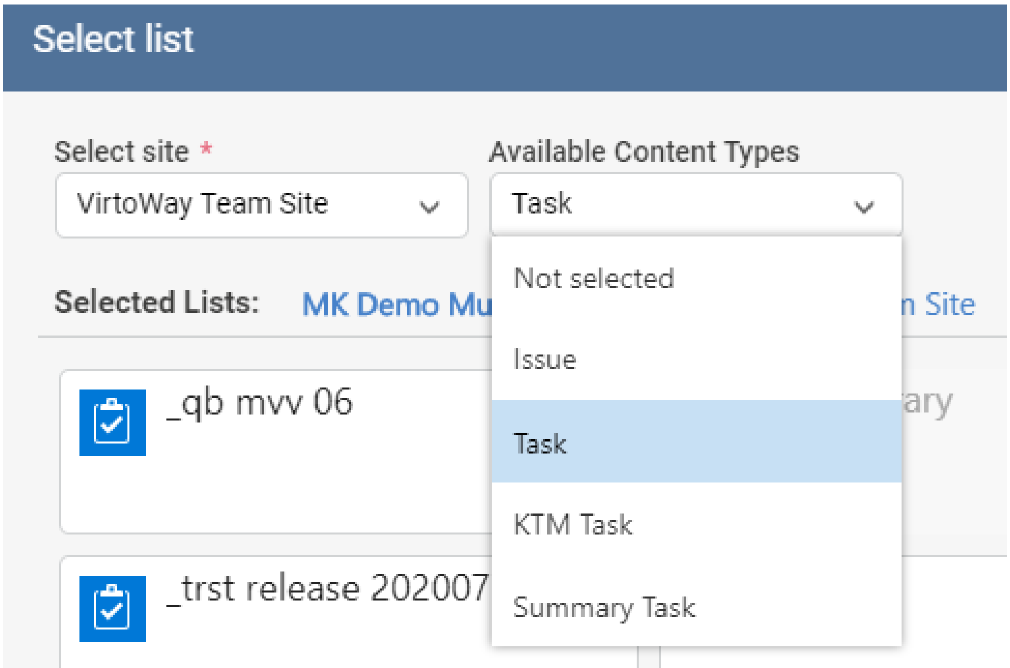
Search for Lists

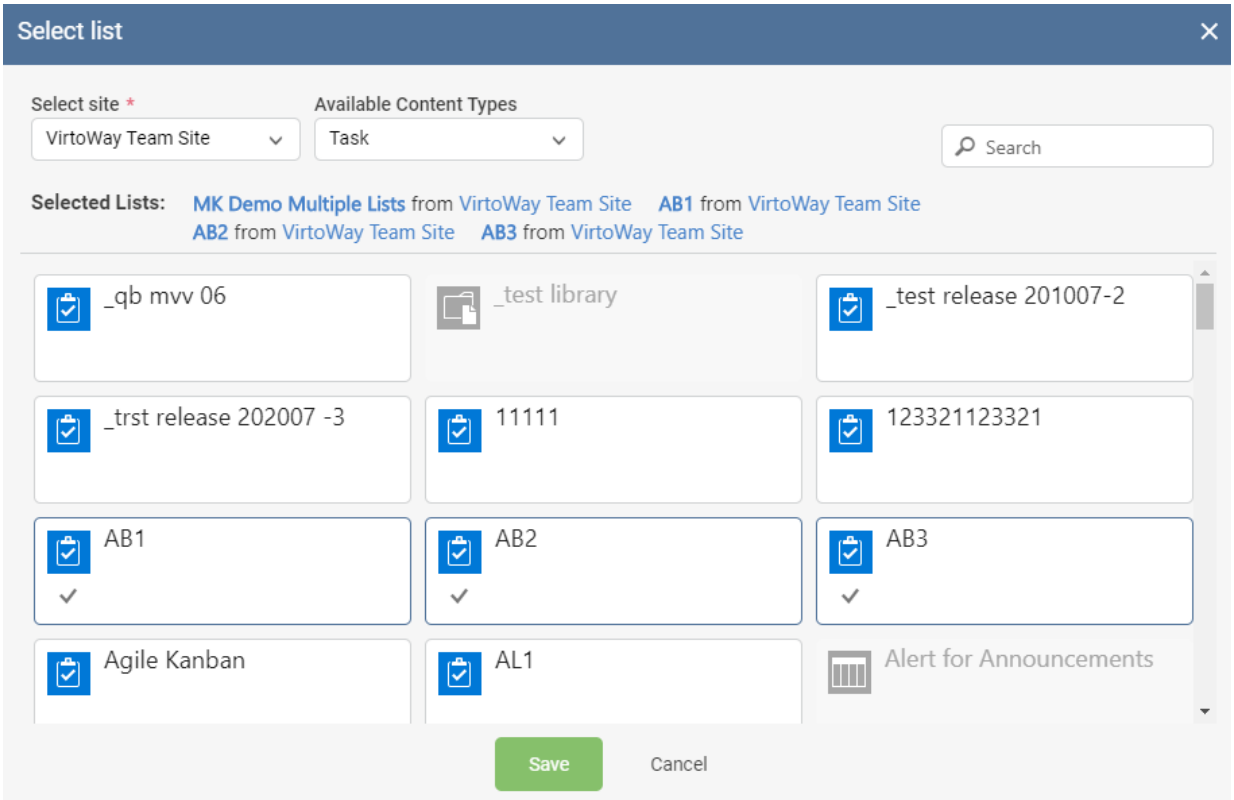
Search field allows you to filter lists by name, according to a specified parameter.



Adding Multiple Lists

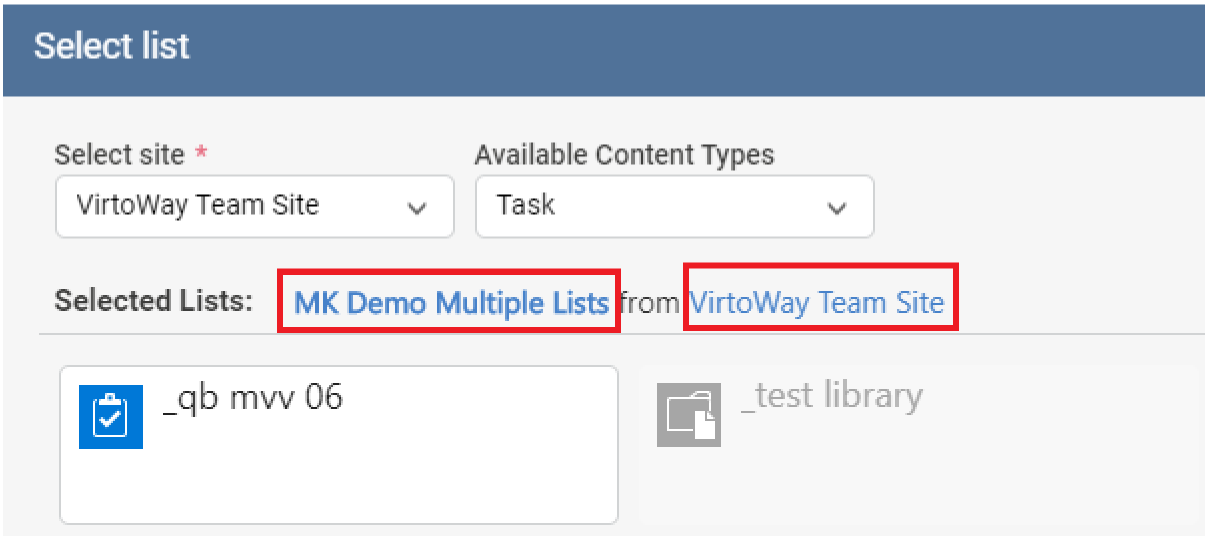
If you need to select multiple lists, choose the required content type in dropdown menu. All lists from the selected site/subsite with this content type will be available to select.





Link to the Board List

The list name contains link to this list, and you can also see the list collection where this list belongs to.

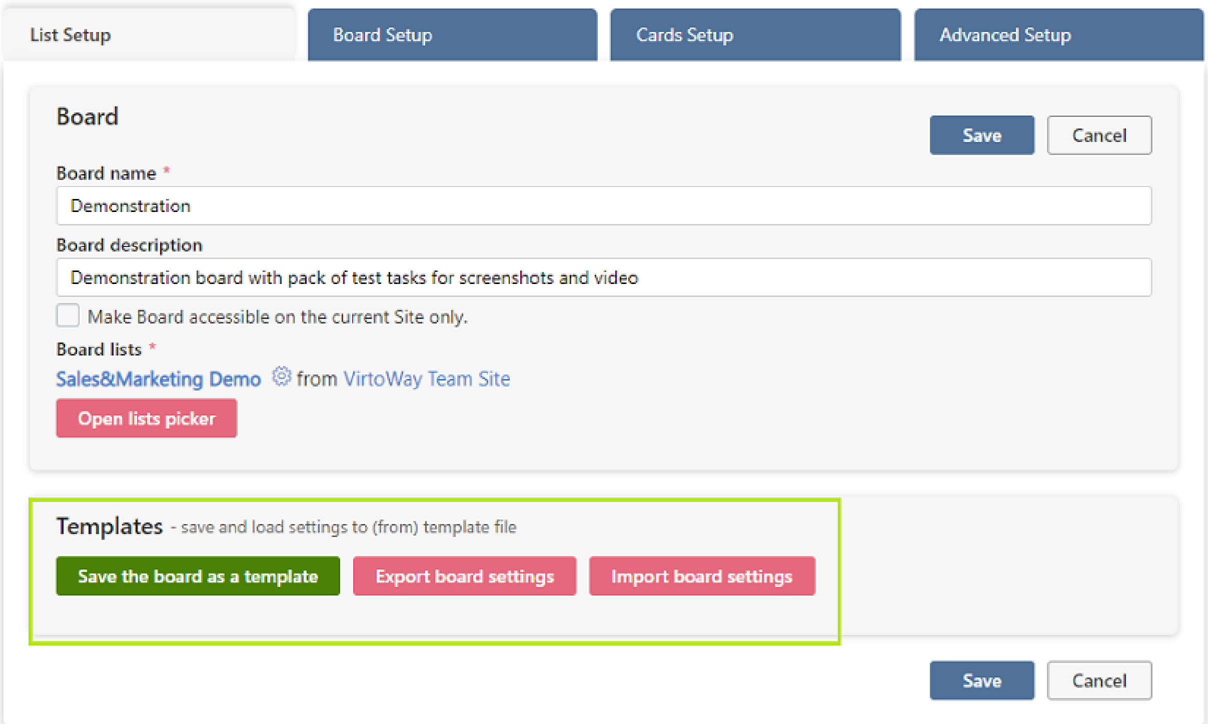


Board Templates

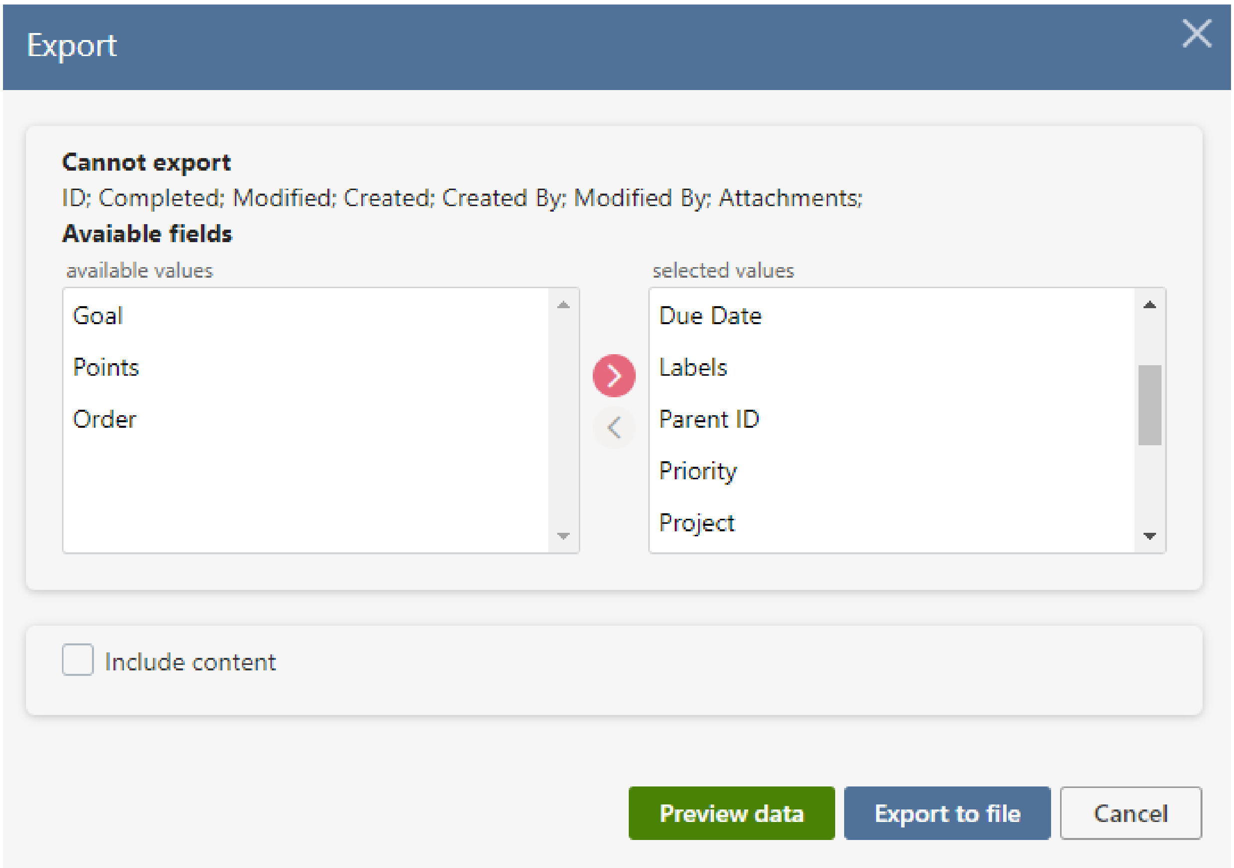
Virto Kanban Board App for O365 supports creating boards from templates.

You can find the option of saving the board as a template in the **List Setup** tab of board settings. There are three options:

- **Save the board as a template** (save a KBOT file to your disc according to chosen fields);
- **Export board settings** (save a KBOJ file to your disc with the current board settings);
- **Import board settings** (choose a file from your disc to load previously saved settings).



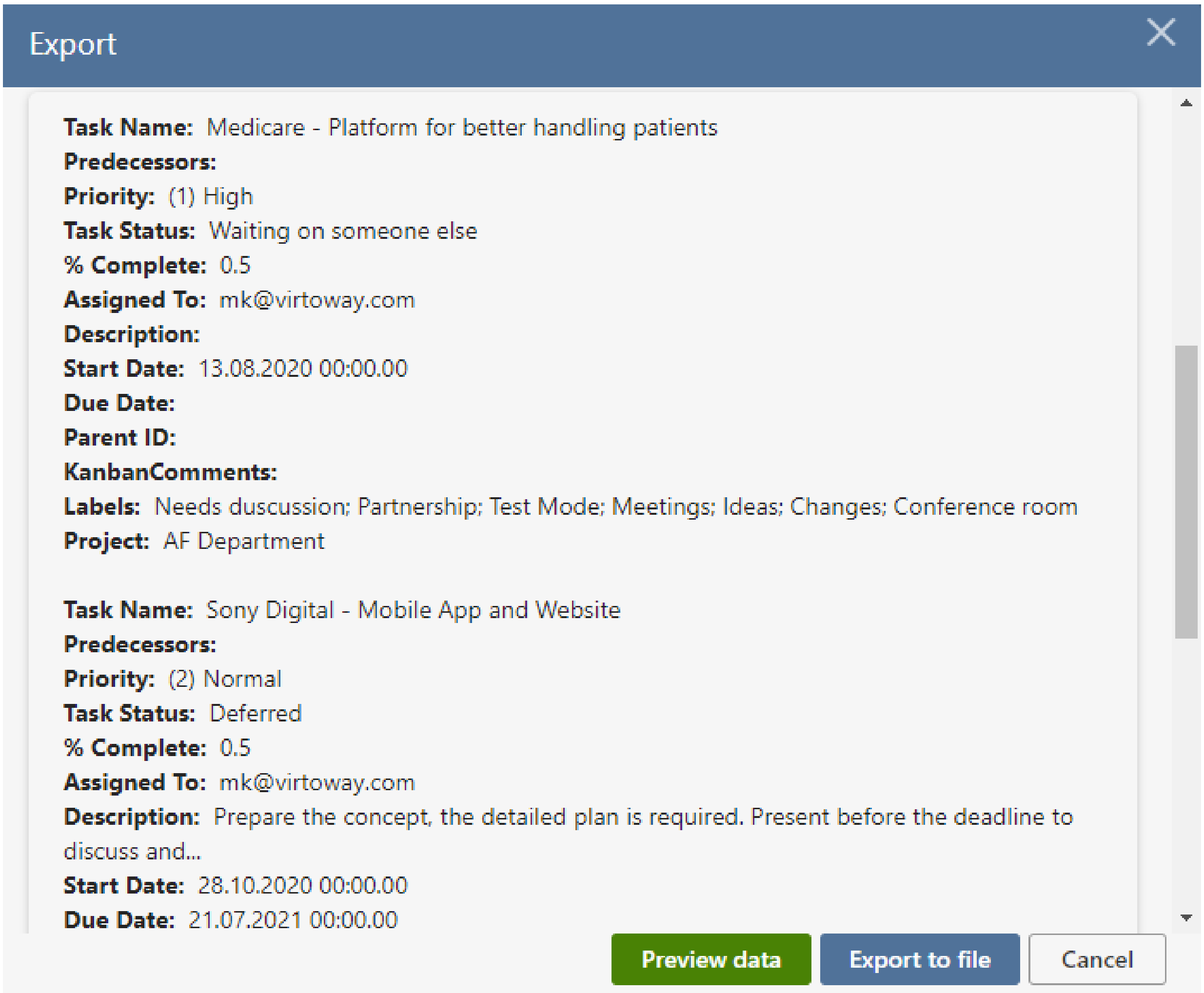
To save a template, find "**Templates**" in the List setup tab and click "**Save the board as a template**". Check the fields you would like to export and pay attention to the fields that are not included.



Export rules

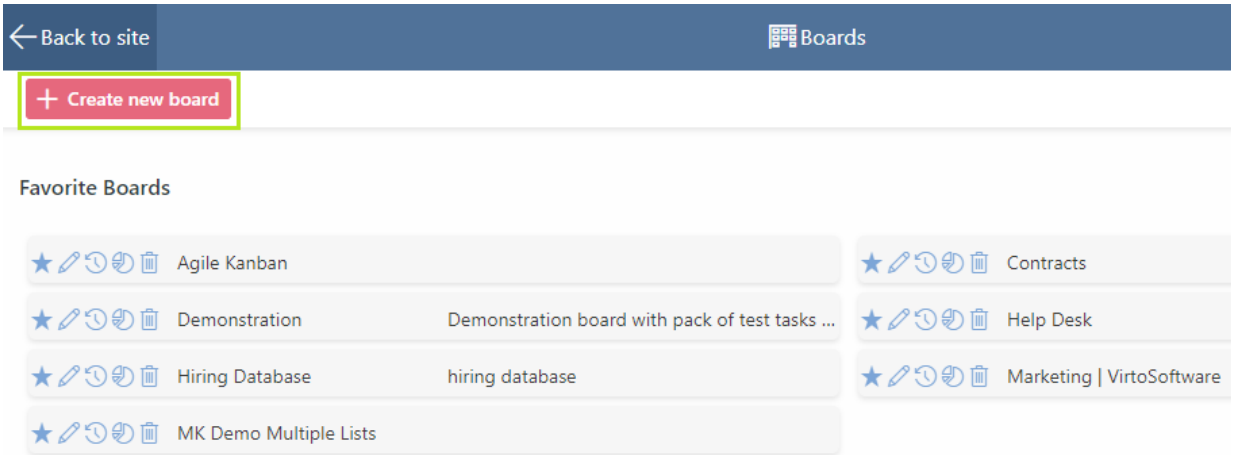
1. You can only create a template from a board if it is based on a **single list**.
2. **Not all fields can be added** to the template. For example, external Lookup fields cannot be exported. You can see the exact list of fields that cannot be exported from the board in your export window.
3. You can include **up to 50 cards** into the template. For this purpose, subtasks are counted as separate cards.
4. You **can exclude the content** and only import list fields and structure.

Make a preview before you complete the export (click “Preview data”).

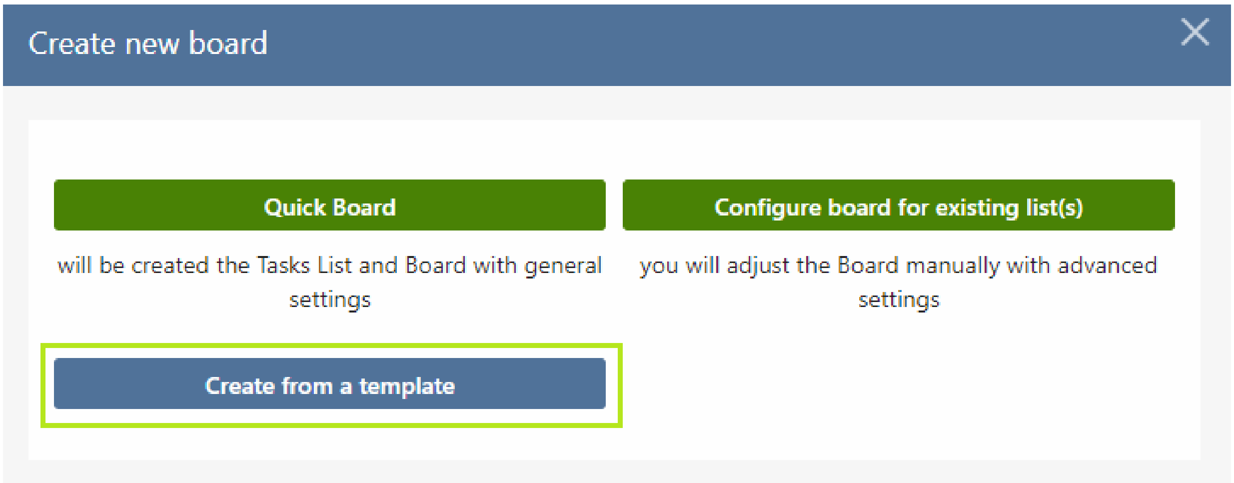


Finally, save the generated file to your disc for future use.

You also can create a new board from a template. Start creating a new board and click "Create new board" on the Boards' page.



Now click "**Create from a template**" — the button we've added in this update.

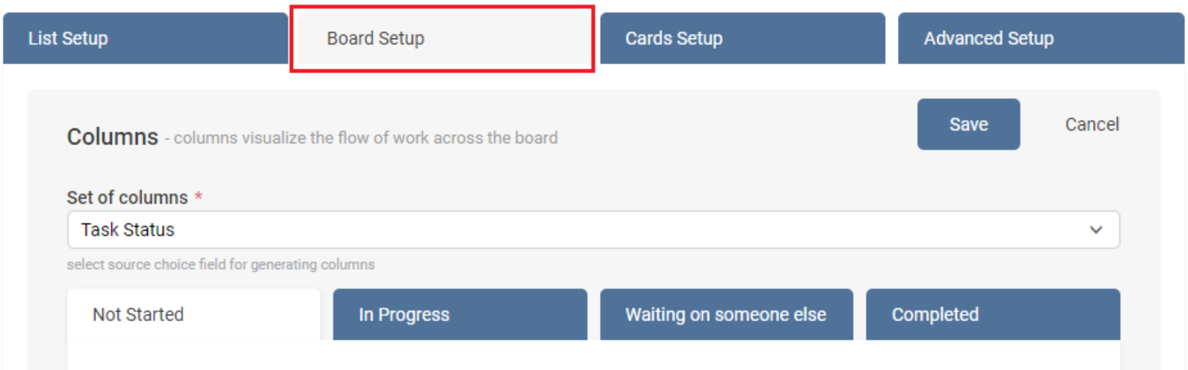


Then choose the previously saved template file from your disc and start working.

Once you create a board based on a template, you have options for customizing it to meet your specific business needs. This way you can work with templates by saving any board settings and content and then using the pre-saved files for extra quick adding of a new board.

Board Setup

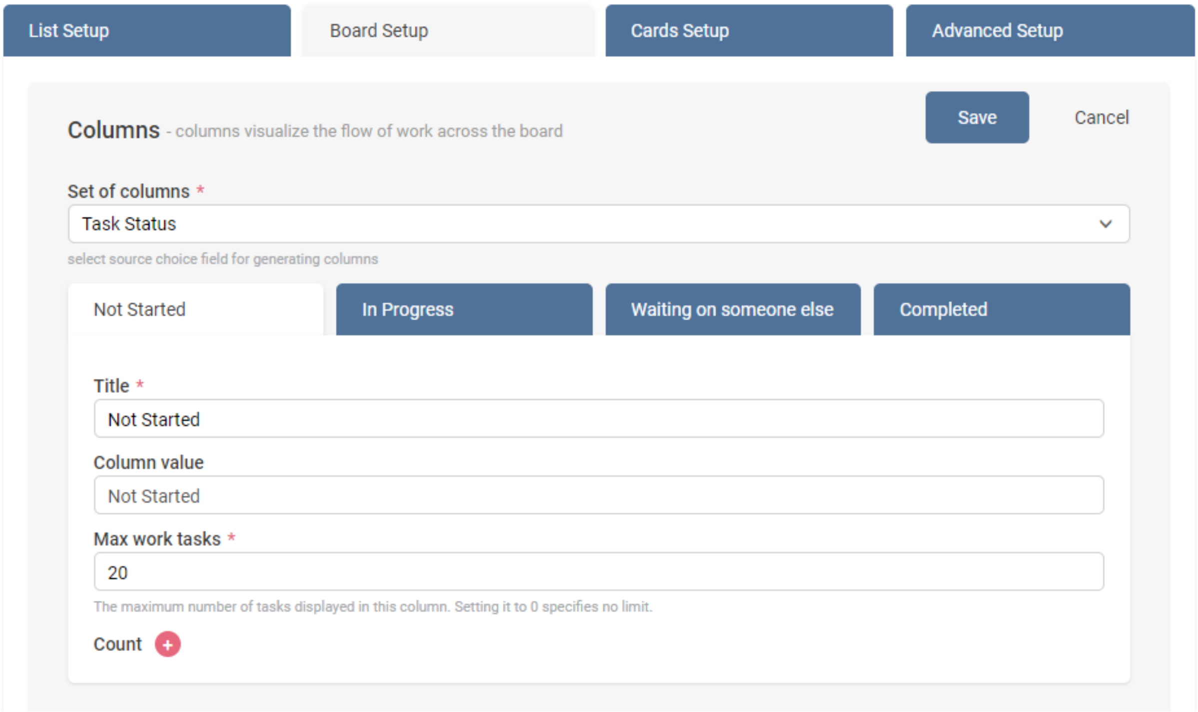
The board setup tab contains basic board settings. Continue your new board adjustment in this block of settings.



Columns

Usually columns visualize the flow of work across the board, though you may have your own concept and apply another field for columns.

Choose the “Set of columns” list field, which will be used for generating columns for Virto SharePoint Kanban. This field must be of choice type.

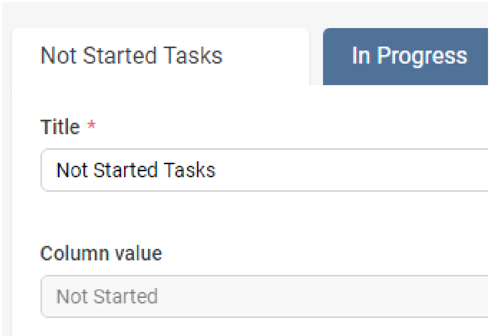


When you have assigned a field for columns, all choice values from this field will be displayed as columns. Then, you can choose the exact columns that will be displayed on board.

Click "…" next to a column name to define the position of the column (move columns left or right) or delete it.

"Insert left" and "Insert right" buttons from dropdown allow you to add back the previously deleted columns.

You can specify a custom title for each column; in this case the column name will be left unchanged in the list.

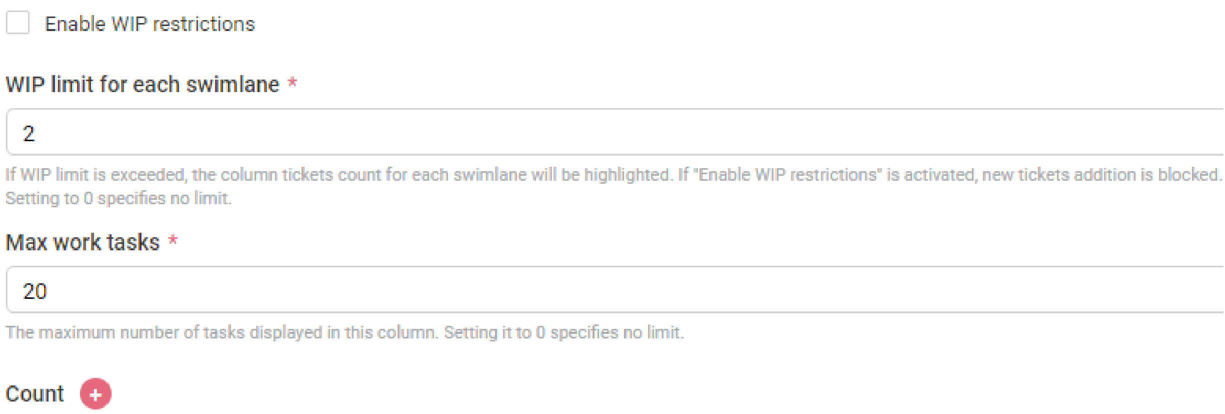


WIP Limit

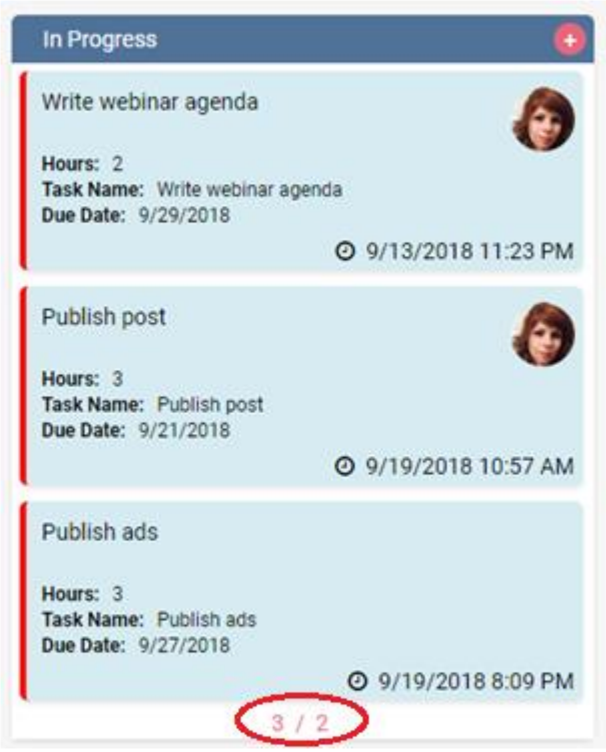
You can set the WIP limit (work-in-progress limit) and specify maximum count of items in a column. If the WIP limit is exceeded, the column will be highlighted with red. The first and the last columns do not have WIP limit.

***Note**: the WIP limits don't work in the default swimlane.*

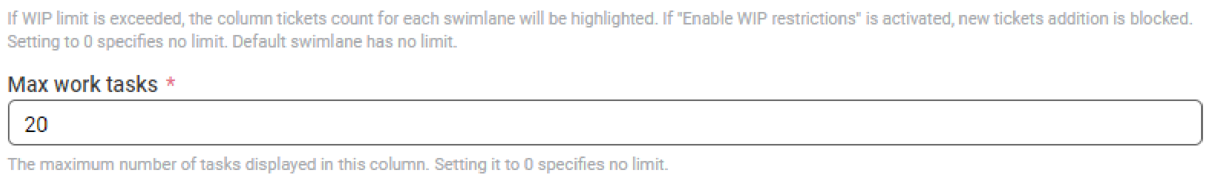
"Enable WIP restrictions" checkbox disables adding new tasks in a column with exceeded WIP-limit.



WIP-limit appears at the bottom of the column.

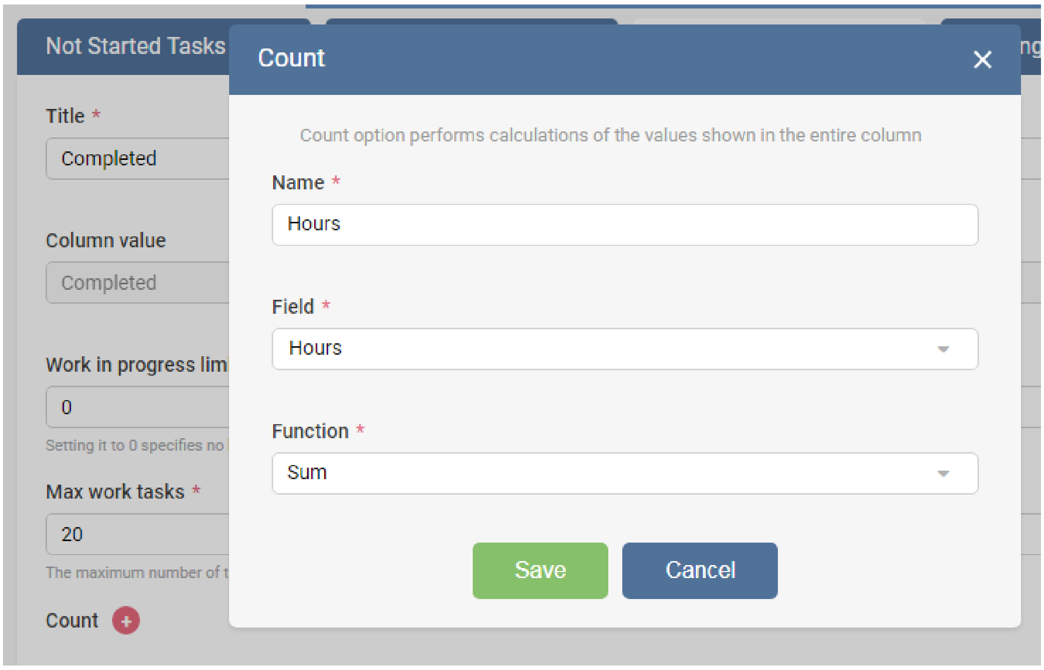


"Max work tasks" option allows you to set the count of maximum tasks available to display in this column. Setting the value to 0 specifies no task count limit. This feature may be useful if you work with large lists with a lot of tasks in a column.



With SharePoint Kanban Board, you can use the count feature to aggregate data for columns. This can be used, for instance, if a task has a "Hours" field (custom content type field), that defines the time required for task closing. You can select this field and choose the Sum function (you can also use the Average function to count average value). Now, the time required for task closing will appear above all tasks from this column.

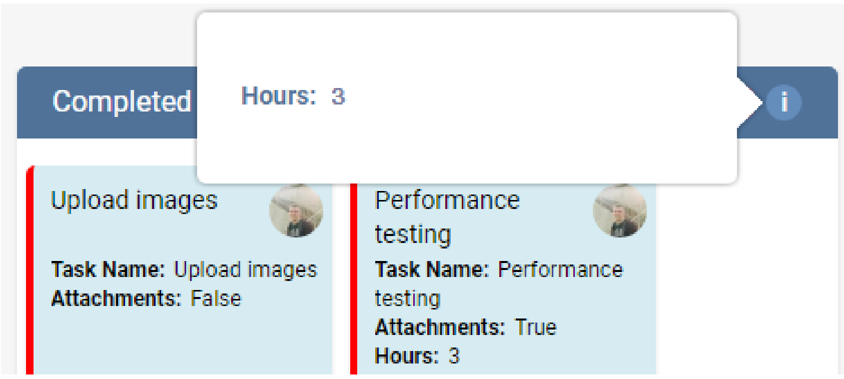
Click "+" next to the "Count" and set values in appeared pop-up window, then click "Save" to save the settings.



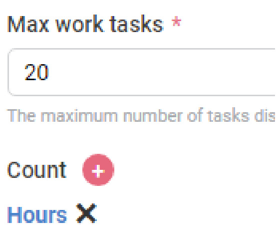
Current version of Virto Kanban has two functions – Sum and Average.

Note: selected task field must contain a number.

Now, total cCount shows the total amount of hours for "Completed" column.

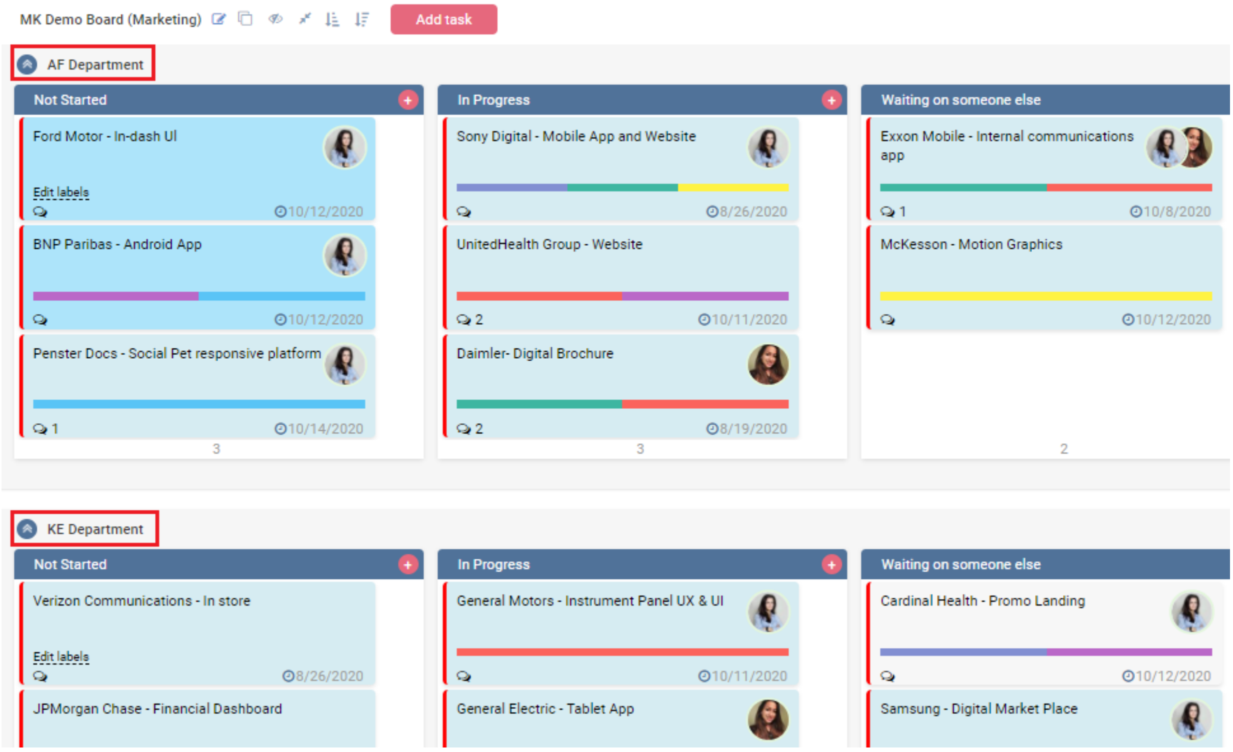


Click "X" next to the Count name to delete this Count.



Swimlanes

Swimlanes visualize different classes of work as horizontal lanes on the board.



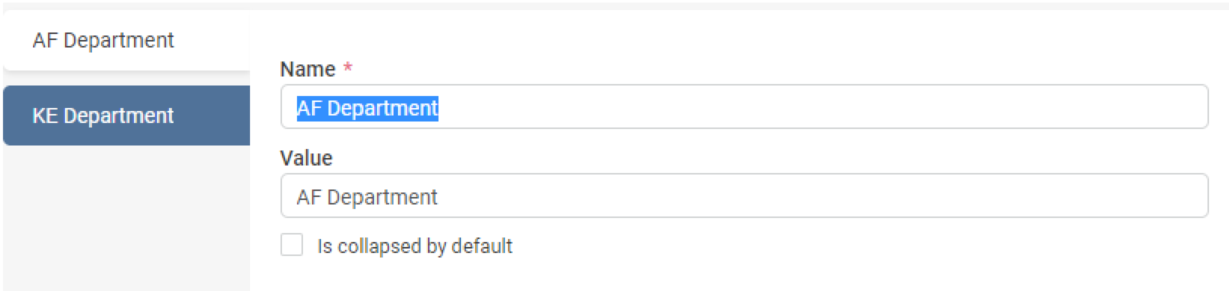
Default swimlane is used as a main Kanban section if there are no other swimlanes.
All tasks not fitting to other swimlanes conditions are automatically placed in default swimlane.

You can create swimlanes by selecting a list field. For example, you can use swimlanes to distinguish task priority (“High”, “Normal”, and “Low”) or create swimlanes by Assigned User field or a Project.

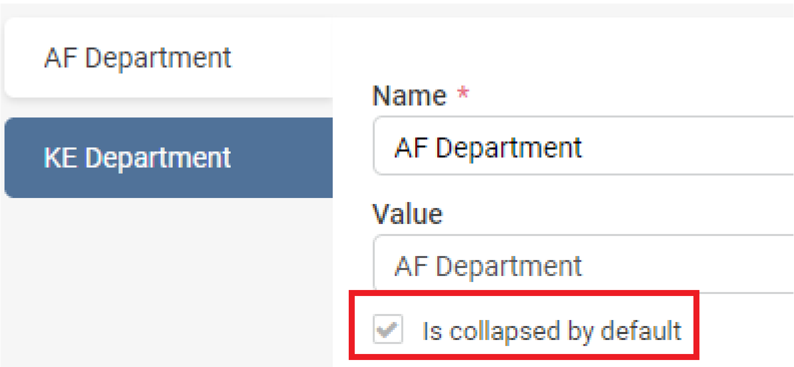
If the list fields contain several values, for examle **Choice, Multichoice, User, Lookup, Boolean, etc.**), it can be used as a swimlane field.

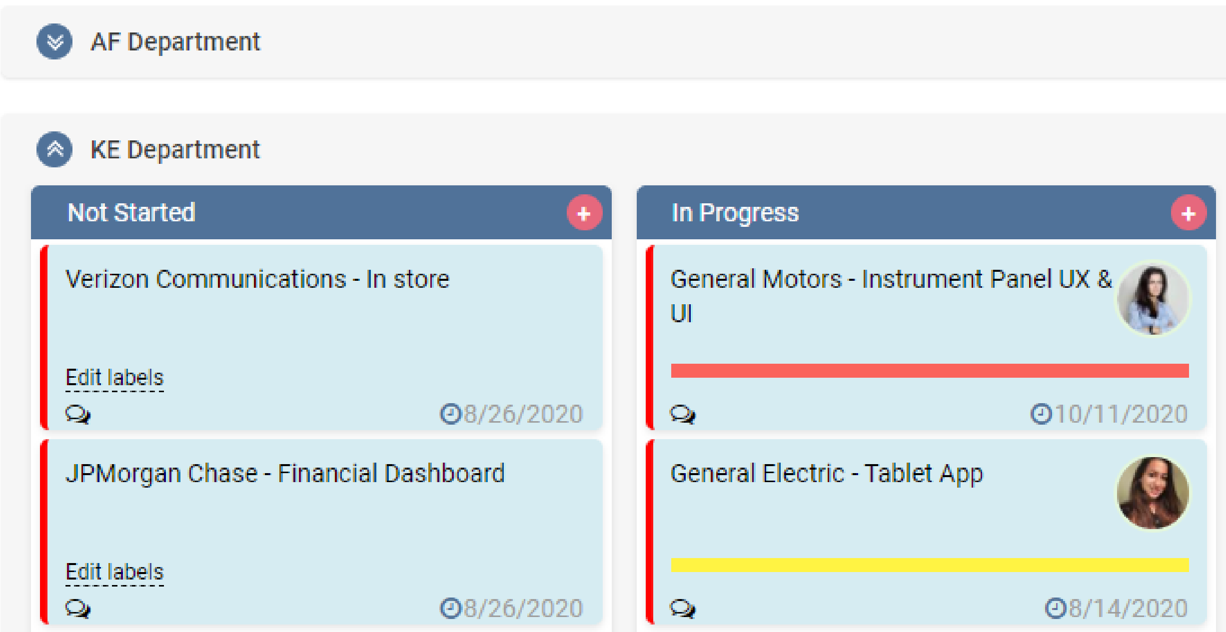
Now, you can select a swimlanes set to be displayed on Kanban Board. Click on dots to remove swimlane or move it up or down, then add more swinlanes. The default swimlane can be also deleted.

You can rename swimlanes.

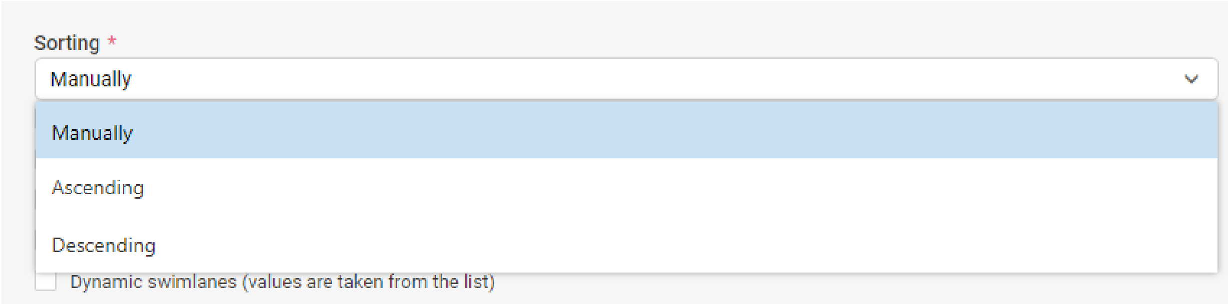


If you check the box “Is collapsed by default”, this swimlane will be collapsed in hidden view when you open your Kanban Board. Also, any swimlane is collapsed by default if it does not contain any tasks.

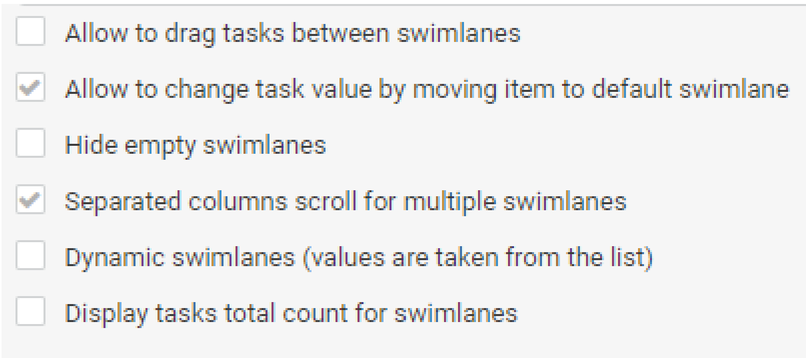




You can apply the task sorting feature to change the order of tasks inside a column or inside a row.

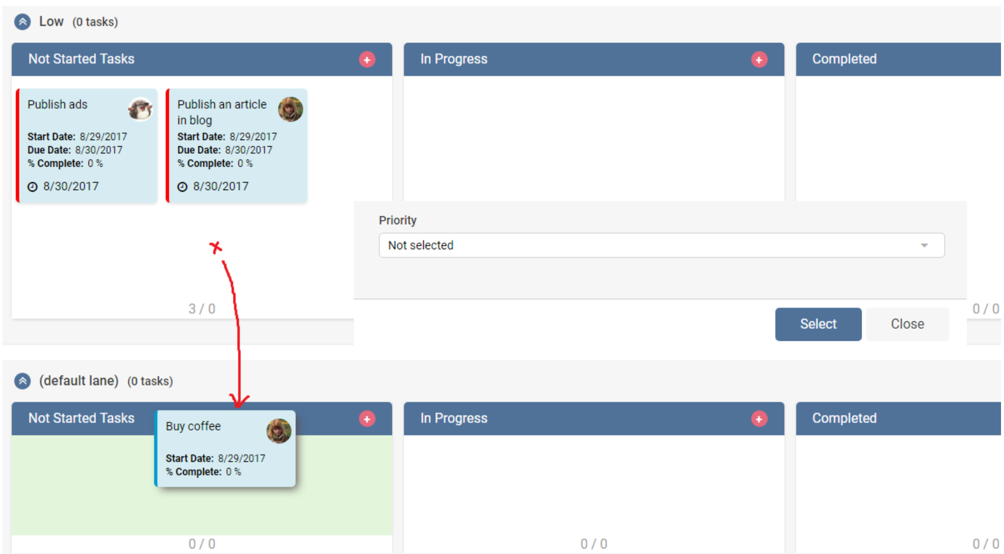


Sorting manually means sorting with drag-and-drop feature. You can also sort tasks in descending or ascending order by title.

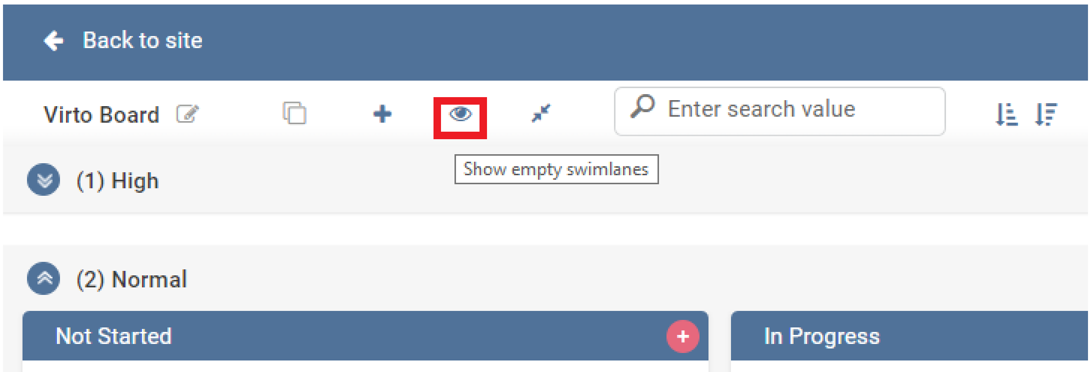


1) "**Allow to drag tasks between swimlanes**" checkbox allows you to move task between swimlanes. The task will change the corresponding field in the source list accordingly. For example, if the swimlane is defined by a project field, it will be changed to another poject.

2) "**Allow to change task value by moving item to default swimlane**" checkbox option is intended to change task value after you move it to the default swimlane. If this checkbox is selected, you should choose a new value after moving the task or leave this field empty.



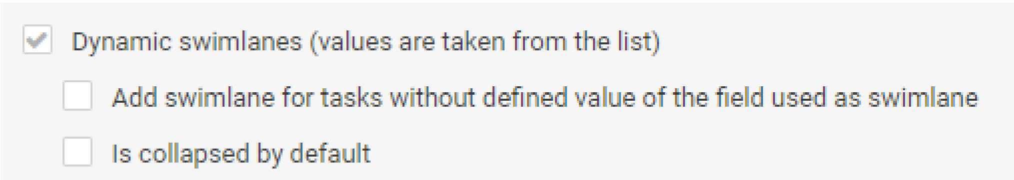
3) “**Hide empty swimlanes**” option allows you to hide swimlanes that don’t contain any tasks at the moment. You can show them again using the button on the board header.



4) “**Separated columns scroll for multiple swimlanes**” option allows you to scroll the columns of muptiple swimlanes seperately.

5) If you enable checkbox “**Dynamic swimlanes**”, the values will be taken from the list without the ability to customize them. This feature may be useful if the swimlanes set of your source list is always being changed. In this case, you don’t have to change the swimlanes settings in Kanban Board and the swimlanes will be added or deleted automatically. If you always use a concrete set of swimlanes for this board, you may disable this option and customize the swimlanes more flexible.

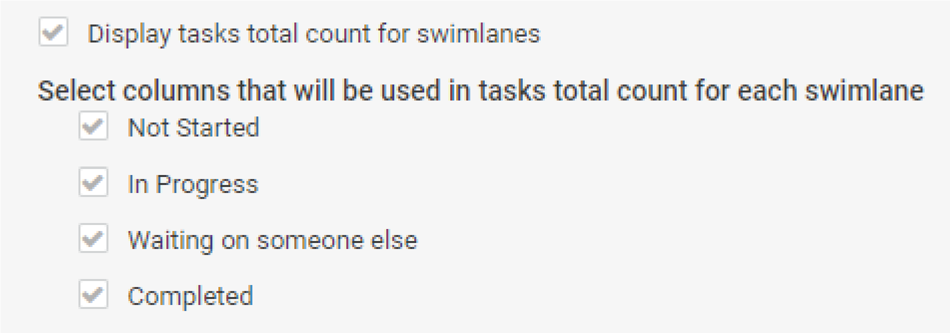
If you choose the “Dynamic swimlanes” checkbox, there are displayed more options.



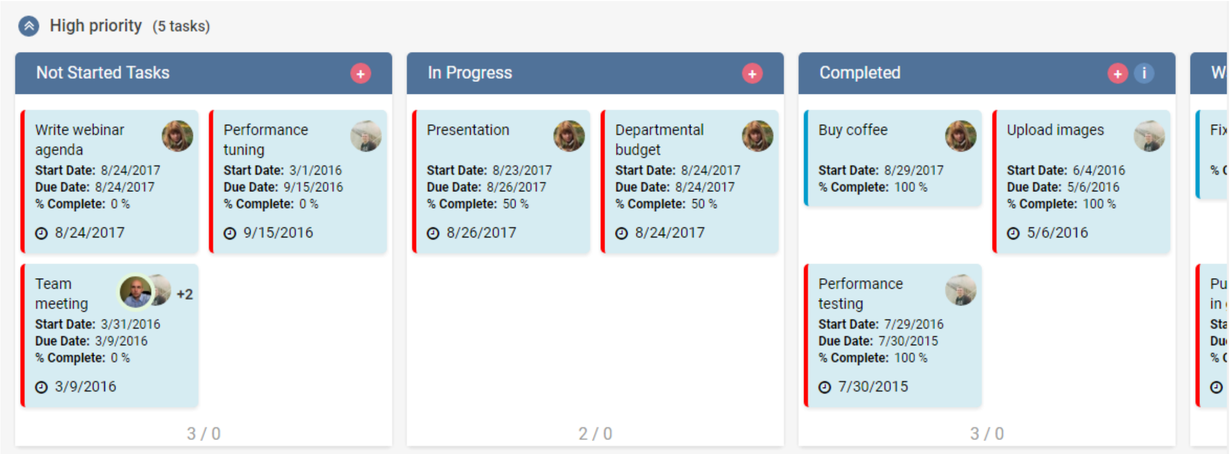
“**Add swimlane for tasks without defined value of the field used as swimlane**” option adds default swimlane, where the tasks which values don’t fit to current swimlanes set (for example, their value field is empty) are placed. You can name this swimlane.

6) “**Display tasks total count for swimlanes**” option allows you to count the number of tasks in chosen columns of a swimlane. You can check the required column to use them for calculating the total amount of swimlane’s tasks.

Total count option for swimlanes allows you to count the number of tasks in chosen columns of a swimlane. You can check the required column to use them for calculating the total amount of swimlane’s tasks.

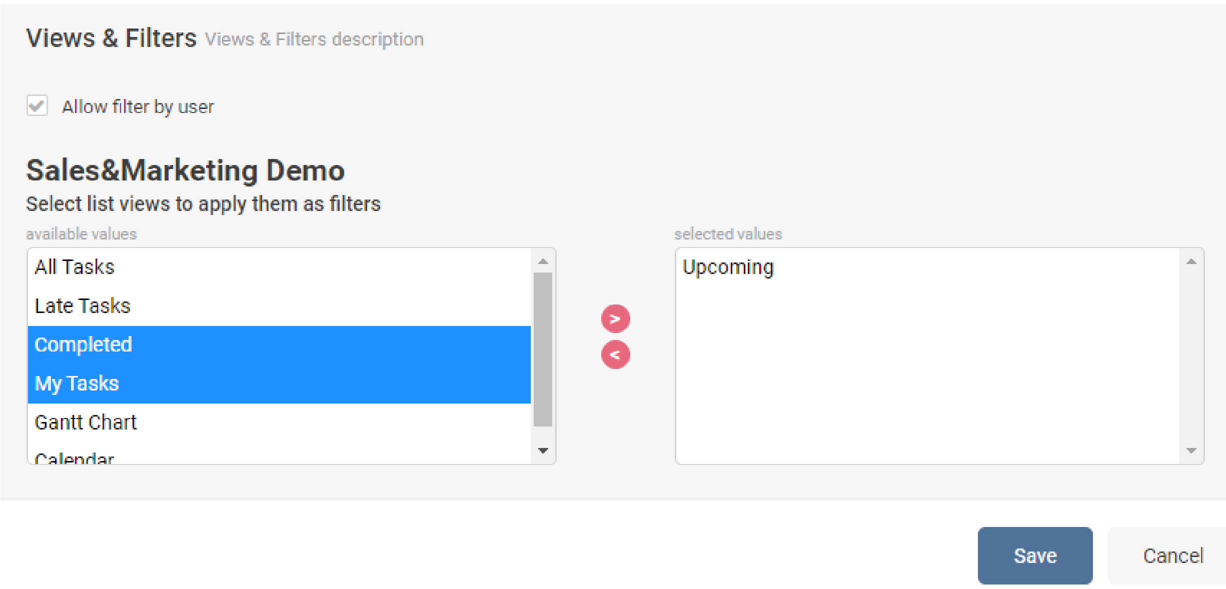


In the following example, the total count of tasks for “High priority” swimlane from the “In Progress” and “Completed” columns is 5. The column “Not started” was not calculated.

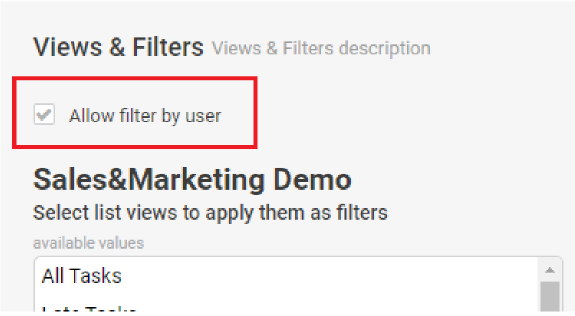


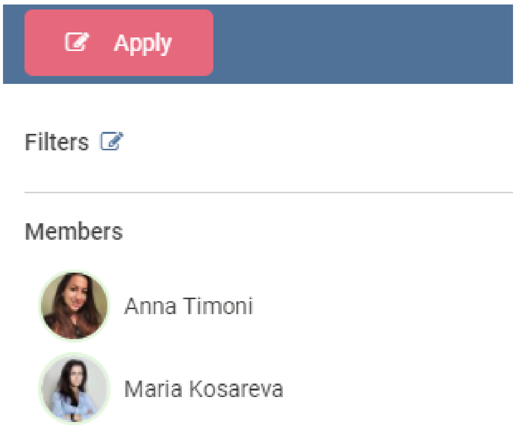
Views & Filters

You can choose list views for each list to filter tasks on the board.

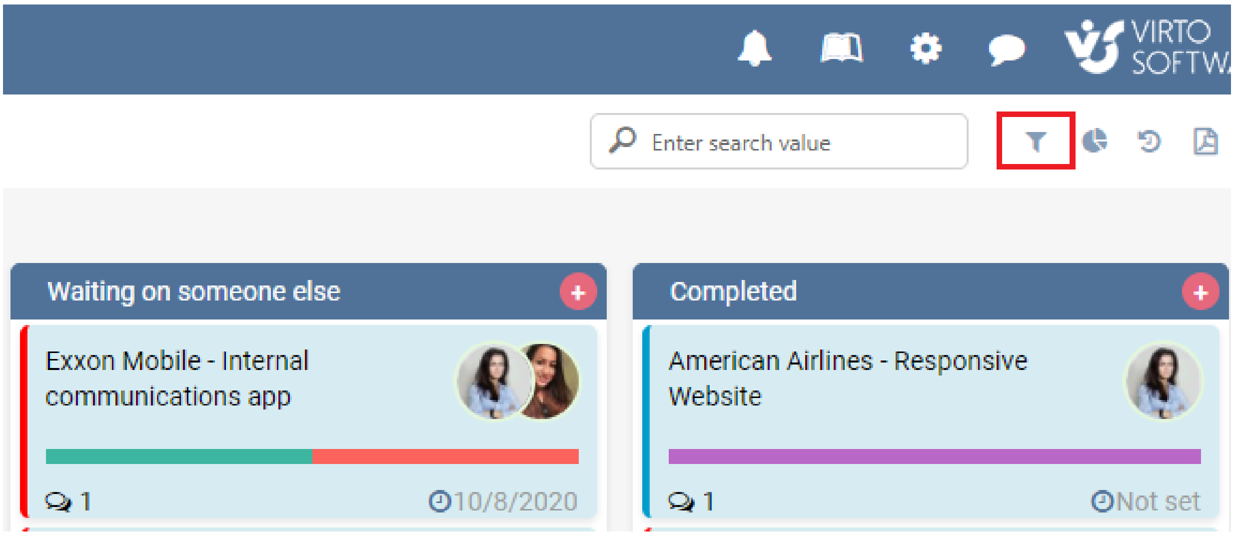


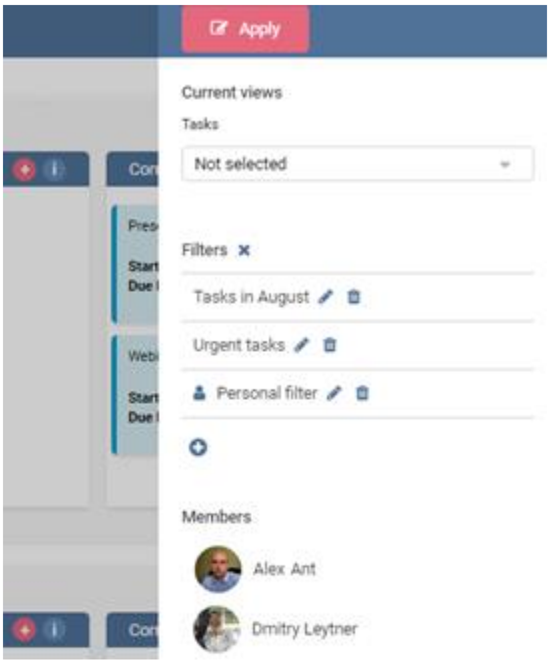
If you choose the “Allow filter by user” checkbox, user filter will be added to Filters on the board.



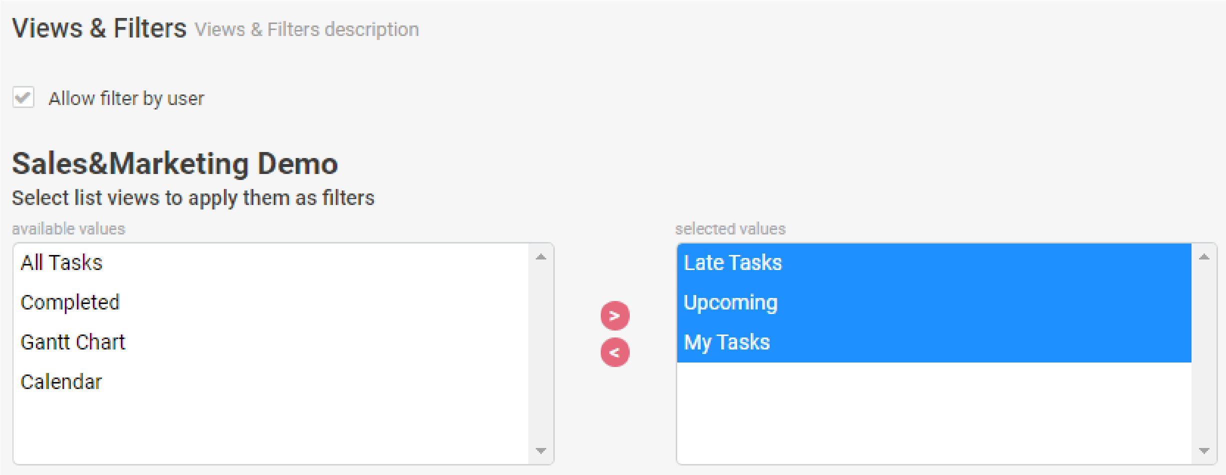


Click “Filter on” / “Filter off” button in the right upper corner to display or create filters.

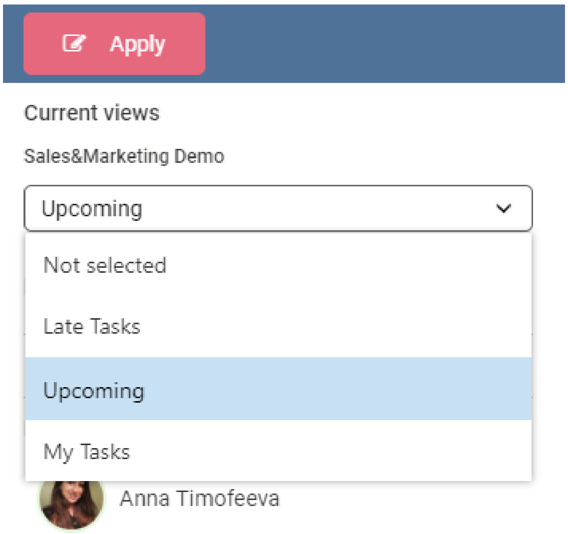




You can define which list views to use as filters.

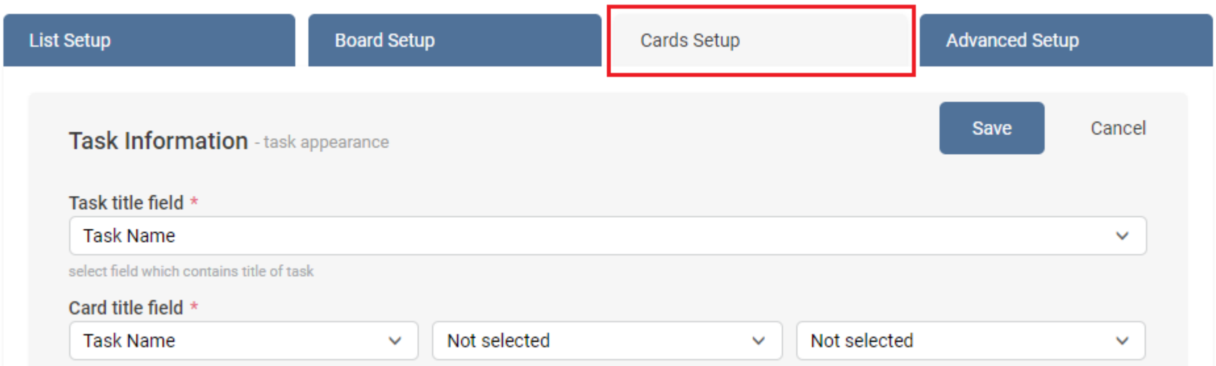


To apply the filter, click “Filters” on the Kanban board, choose a filter for a list and click “Apply”.



Cards Setup

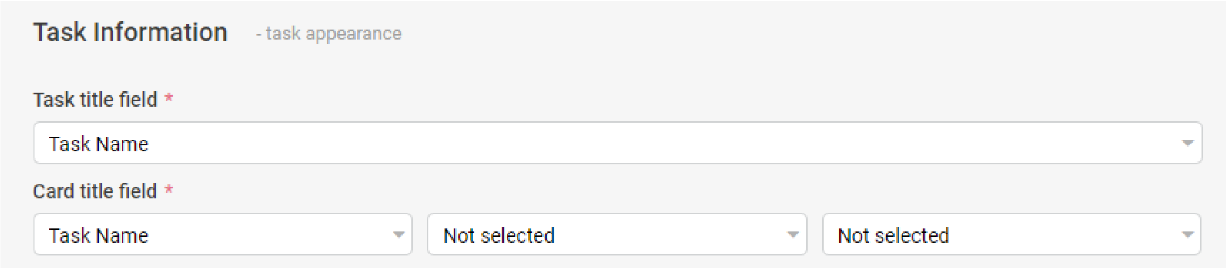
Continue your board adjustment in the cards setup tab.



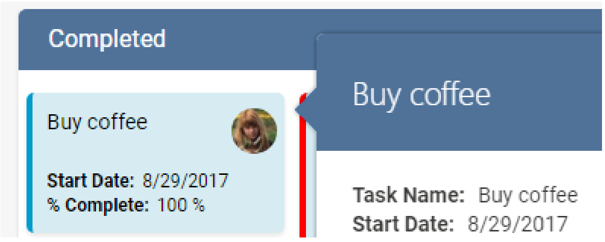
Task Information

You can customize the task information and card appearance in the “Task Information” block of settings.

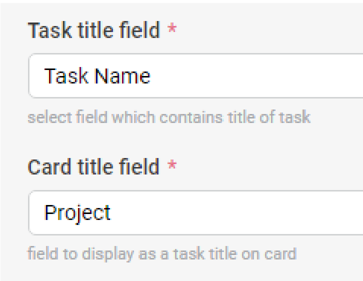
Choose a field to be displayed as a task title. You can add any list field to display it on the board (for example, task or project name).

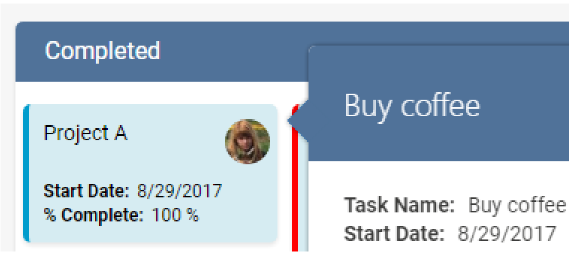


In this example, the task title field is equal to the card title field.



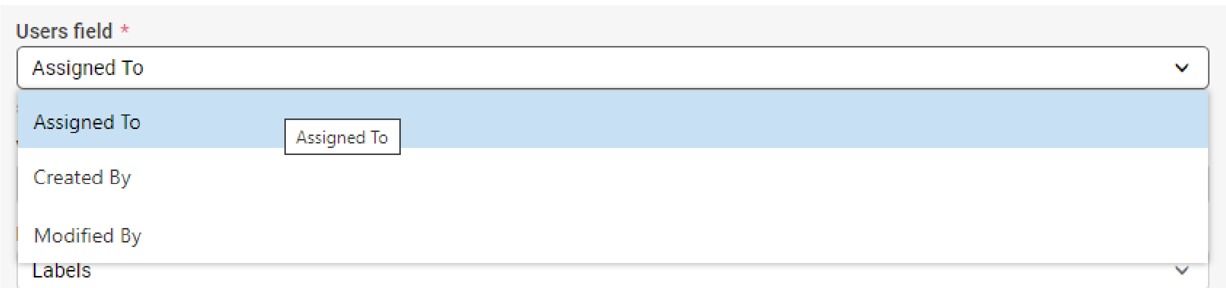
In another example, the task title field of item is an actual task name. And the Card title field for displaying on the task body contains the value from the column "Project" (the custom column added to the current Content Type).



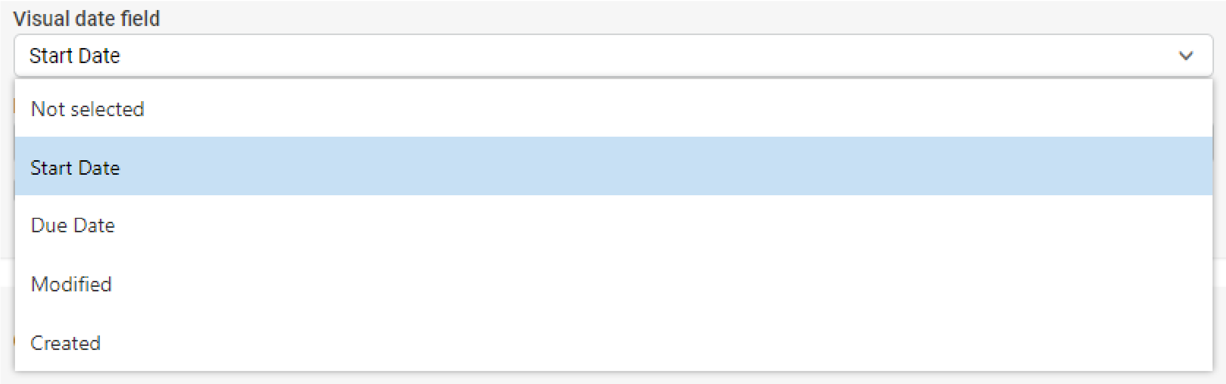


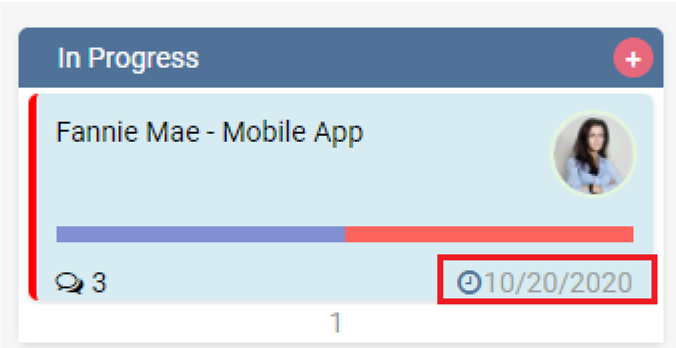
***Note**: the card title may contain up to 3 list fields.*

Then you should select from which field users assigned to a task will be taken.



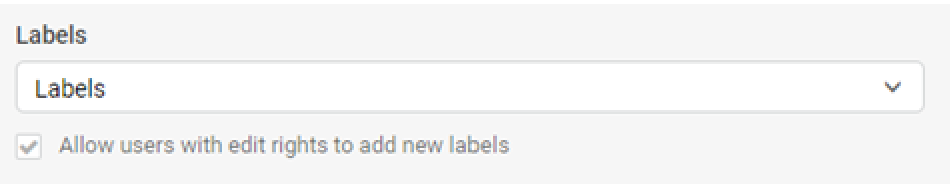
You can select a date field to display on the bottom of card. For example, you can display Due Date field to track overdue tasks on your board or use Start Date.

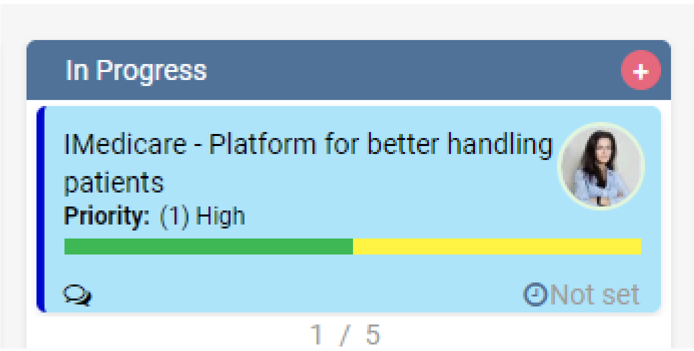




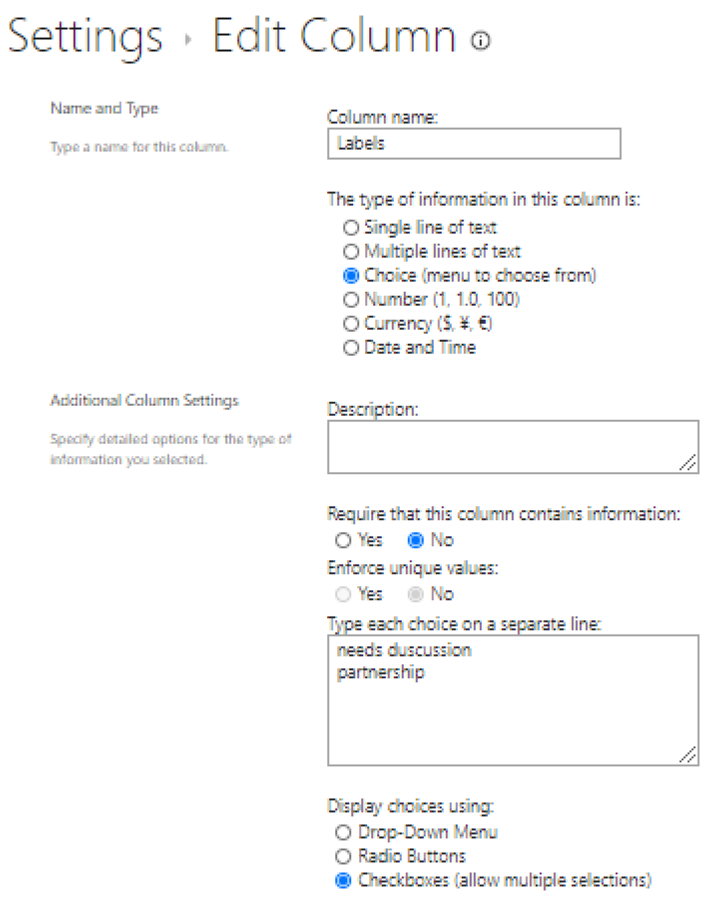
Labels

SharePoint Kanban Board labels are actually color-coded tags on Kanban cards.



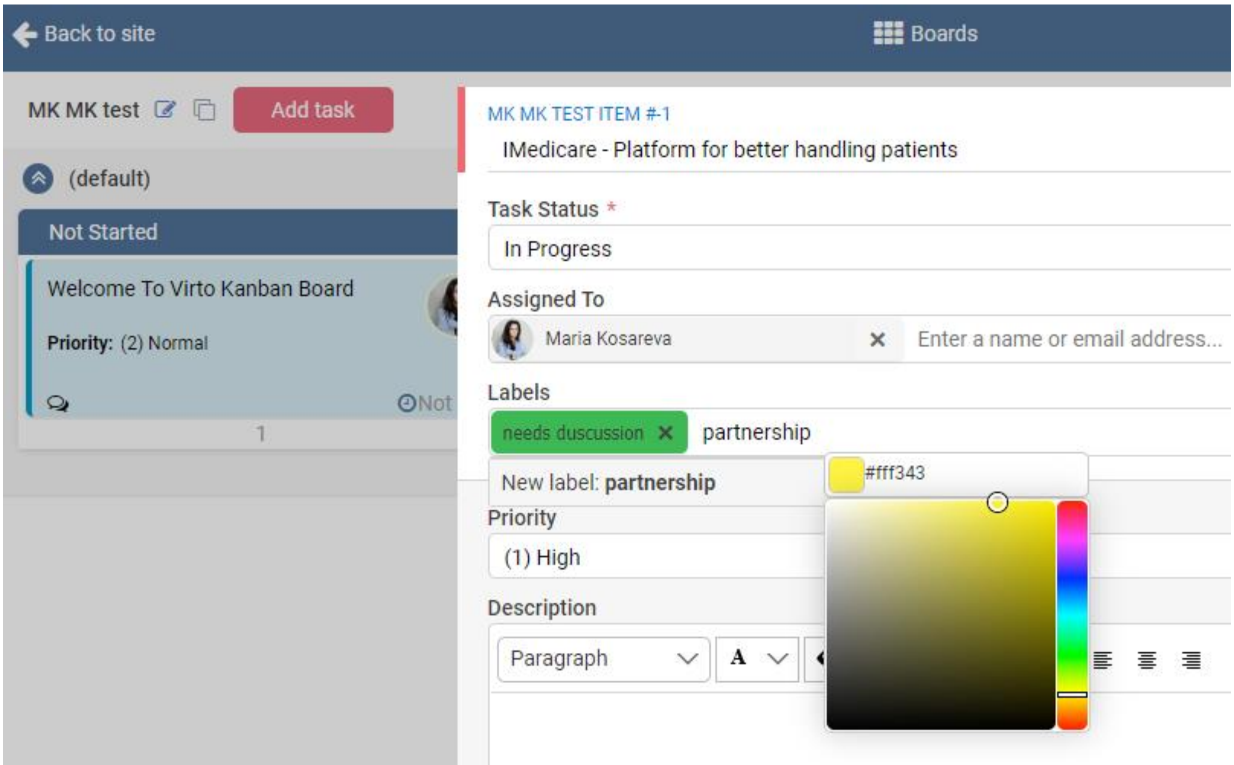


Label values are taken from a custom multichoice column added to your Kanban list.



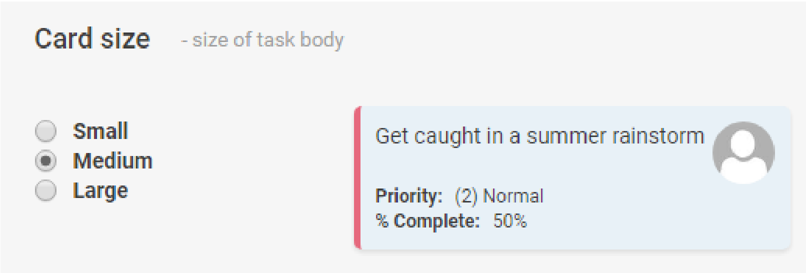
Just choose this column in the cards setup settings block.

You can also allow users with Edit permission (selected in Kanban Settings > Advanced Setup > Permissions) to create and edit labels (values from multichoice column). You have to add Labels column to Kanban card edit form to manage values and colors.

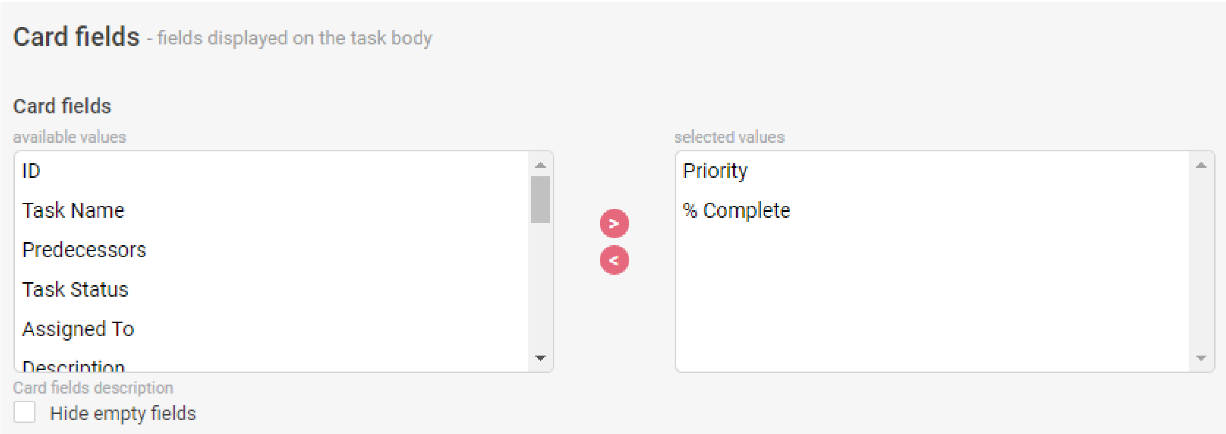


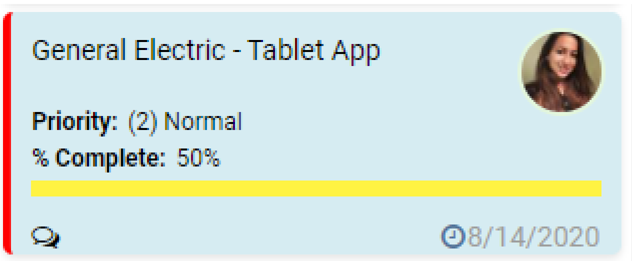
Appearance

The size of tasks on your board is also can be adjusted. You can select the Small, Medium, or Large task's size to match the board design.



Card fields settings allow you to define the set of fields displayed on task body.



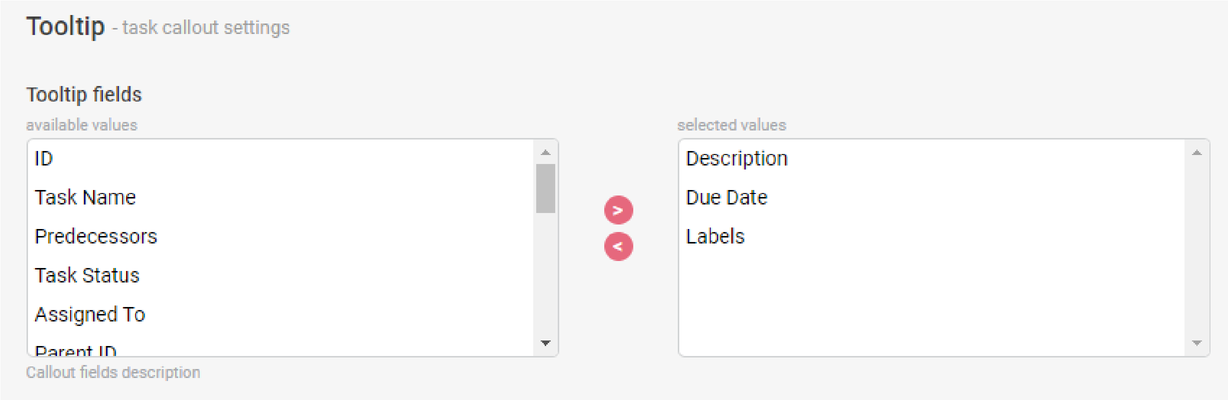


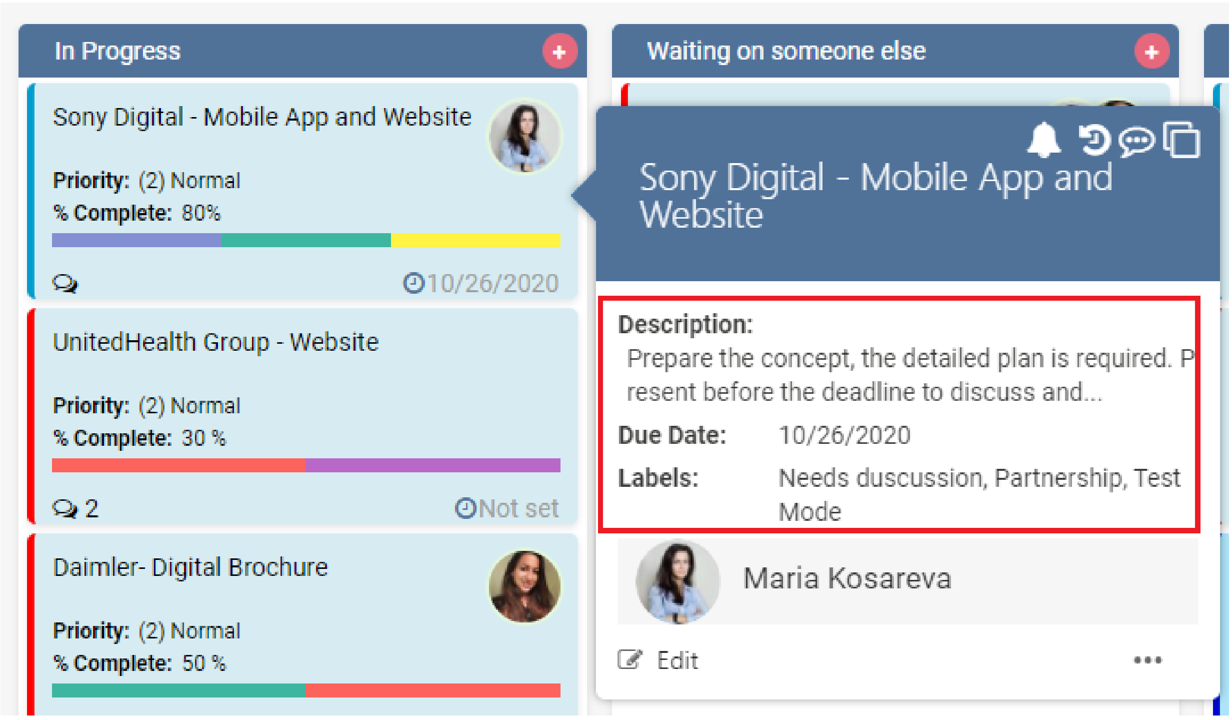
***Note**: you can allow users to add choices to fill-in choices fields.*

When you have to add some new values to the choice type fields, you usually leave the Virto Kanban interface and access a SharePoint list to make changes. Sometimes these new choice values appear during the work process and require extra time to manage them. You can enable 'Fill-in' choices feature for a column to allow end users to add choice values right on SharePoint Kanban Board.

Tooltip

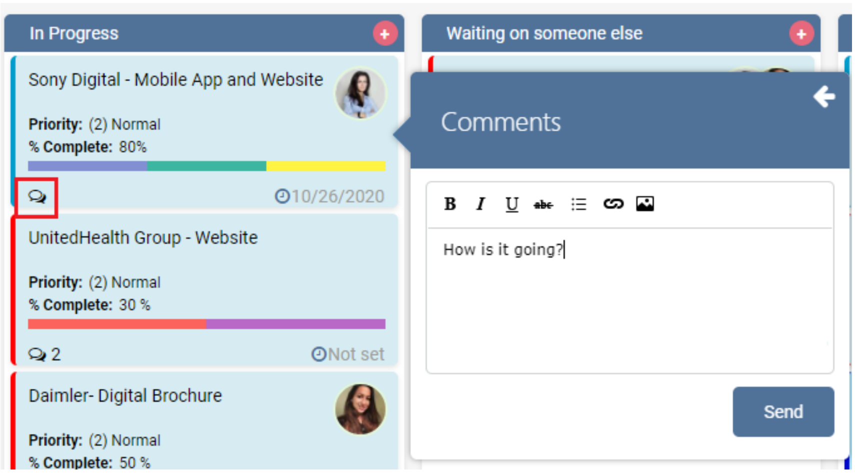
You can also define which fields will be shown in a task pop-up window — in a tooltip.



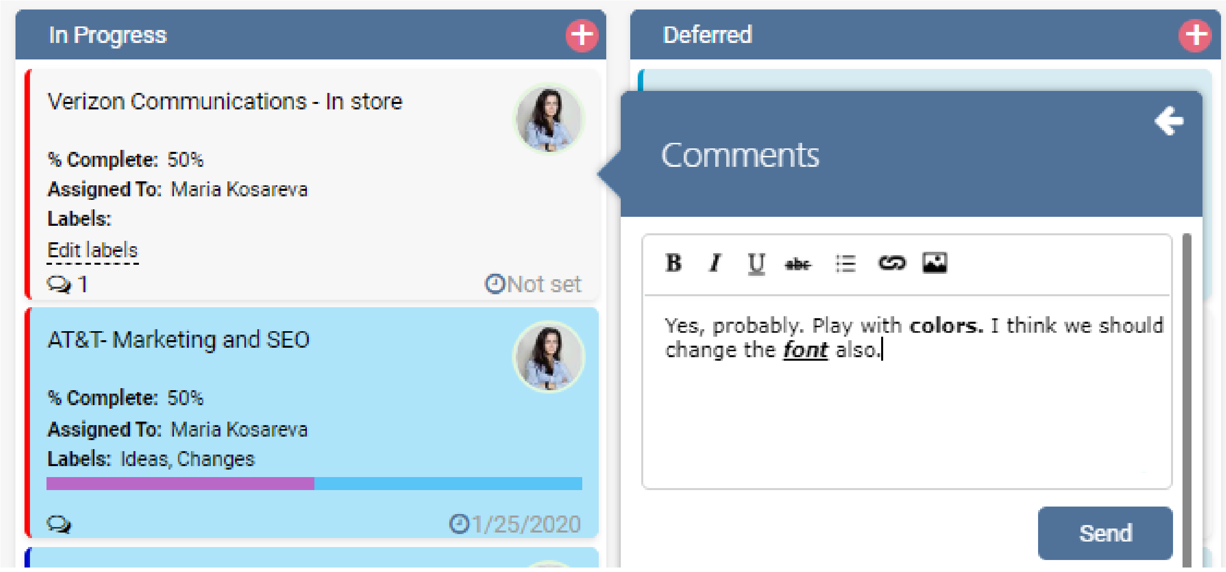


Comments

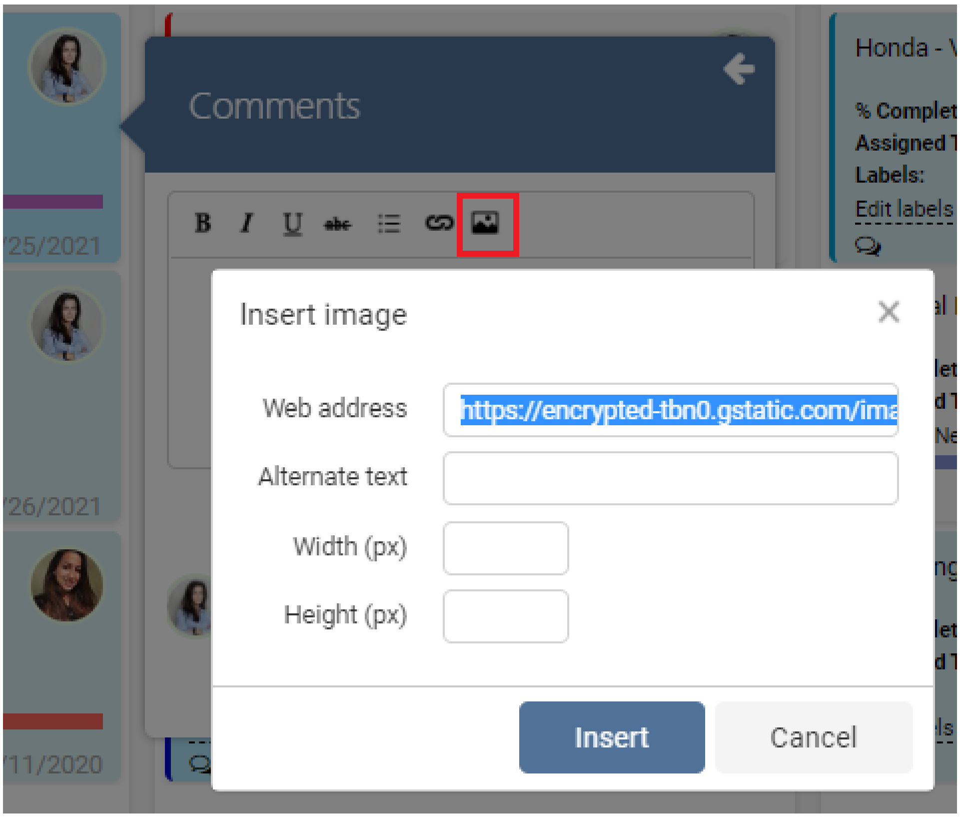
You can add comments to your tasks. Click the comment icon and type the message you'd like to leave.



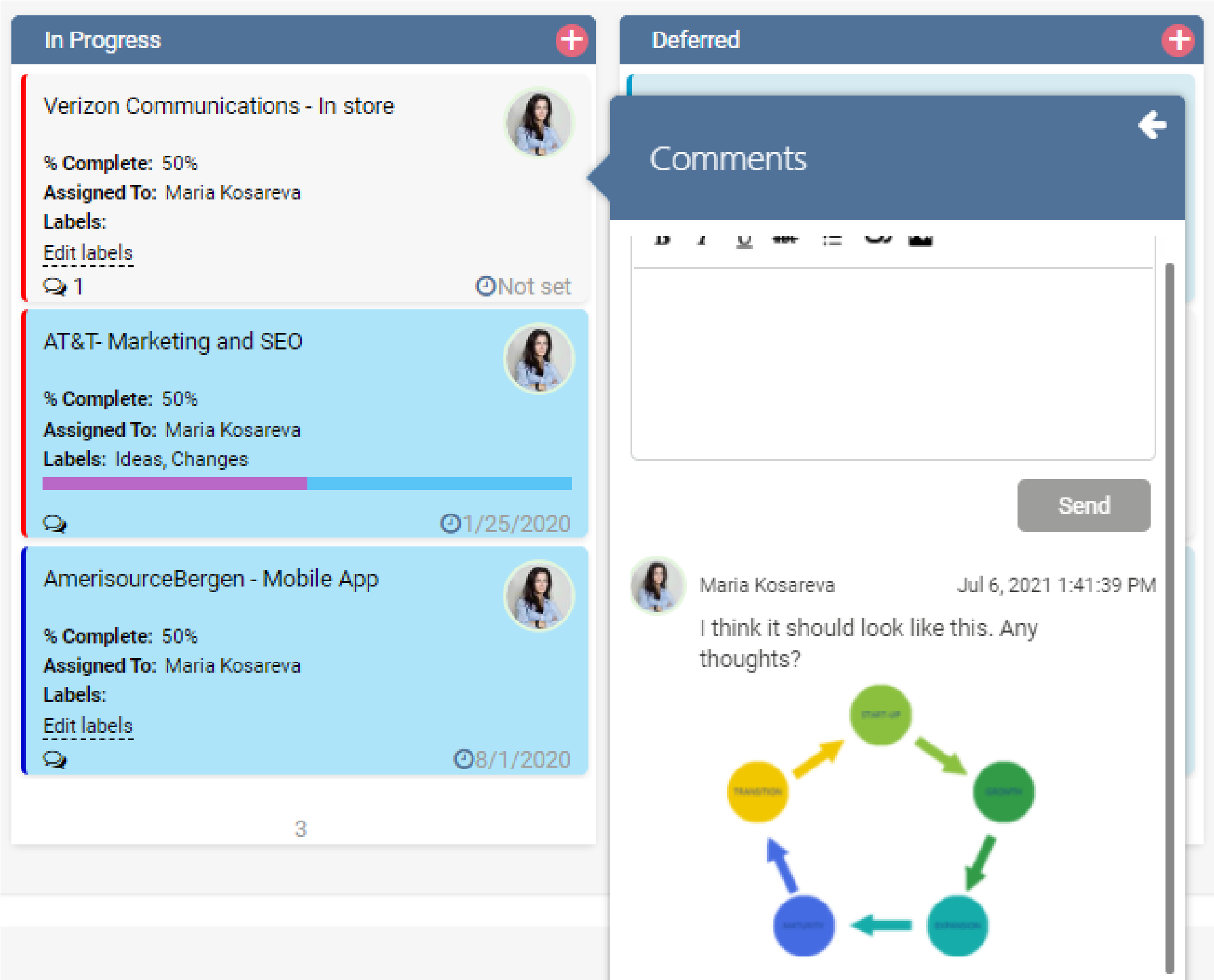
Use the font format you wish to highlight your ideas.



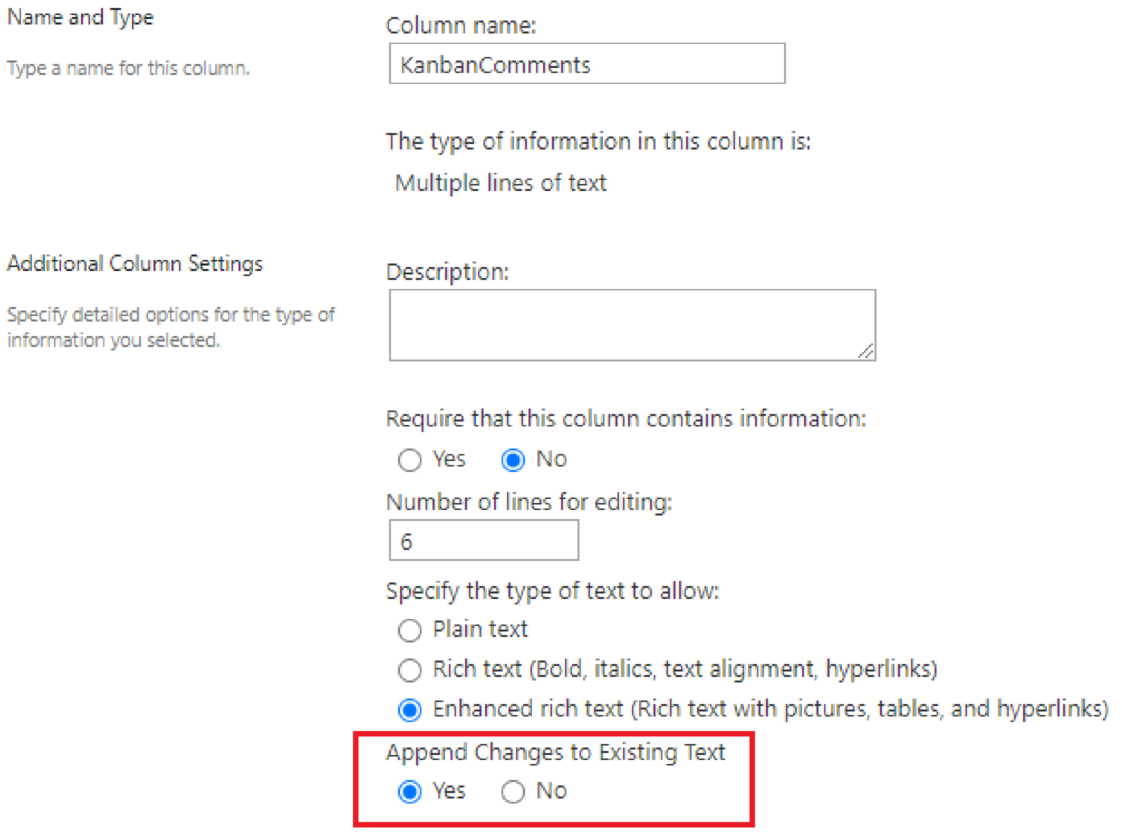
You also can attach images to the comments. Easy way to elevate your ideas visually. Click an image icon and paste the copied link to the image to attach it. Set the width and height or alternate text if you need. And click “Insert”.



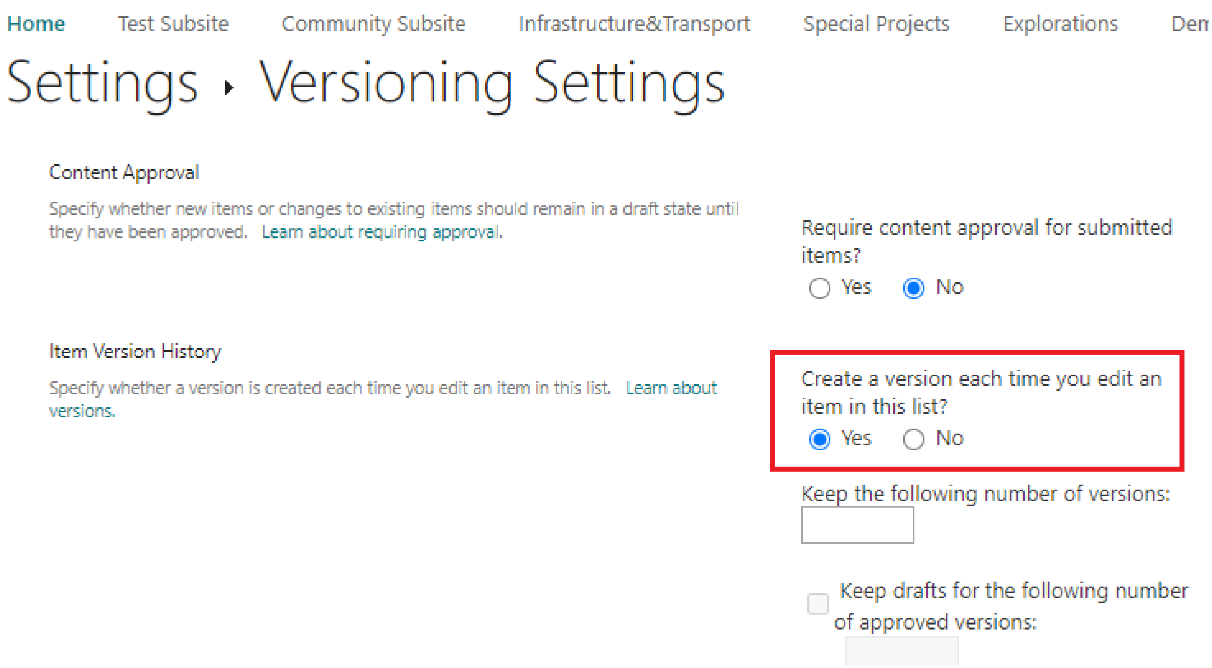
The chosen picture will appear in the comments feed.



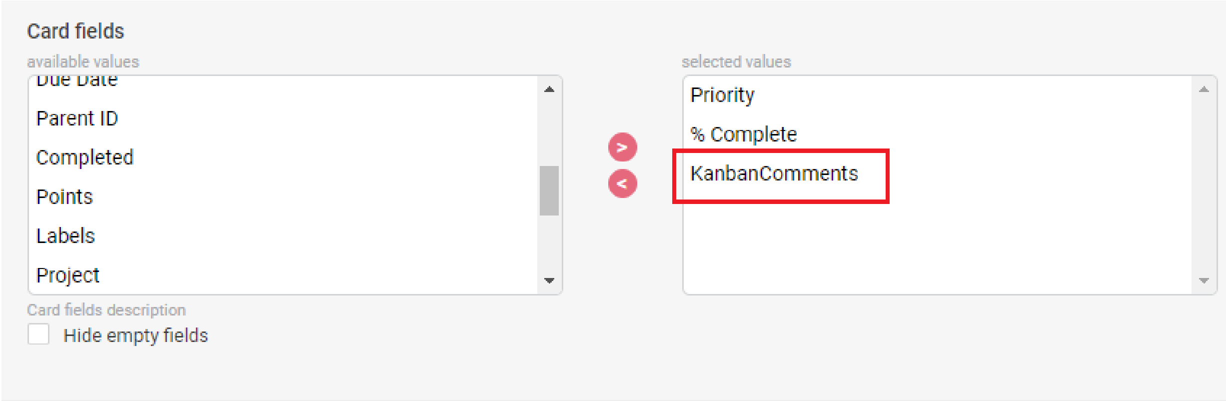
If you create your Kanban list via Virto Kanban Quick board, this list will have “KanbanComments” field by default. If you use already existing list, you need to add a text field to keep the comments. Create a custom “Multiple Lines of Text” type column added to the selected content type of your Kanban list. Please check the column has the checkbox “Append Changes to Existing Text” chosen.

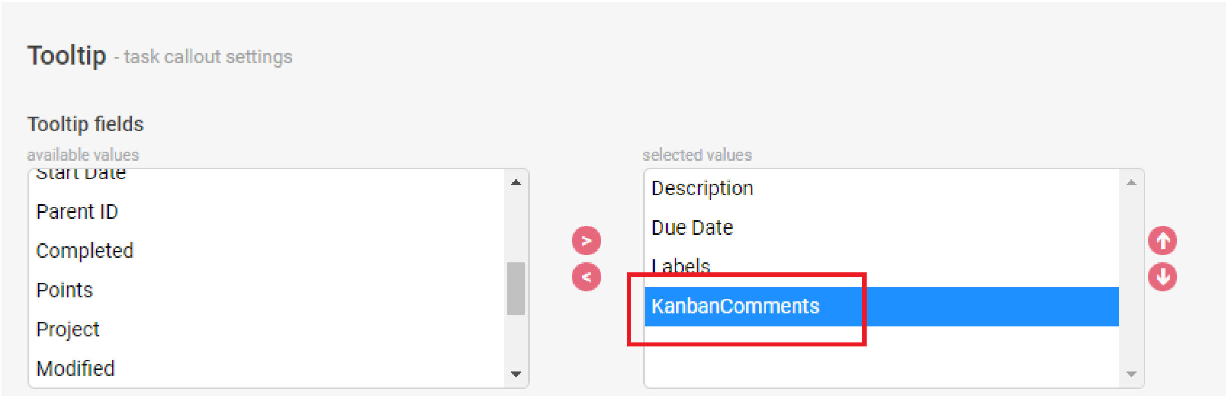


The “Item Version History” in the list versioning settings should also be enabled. Please check it.

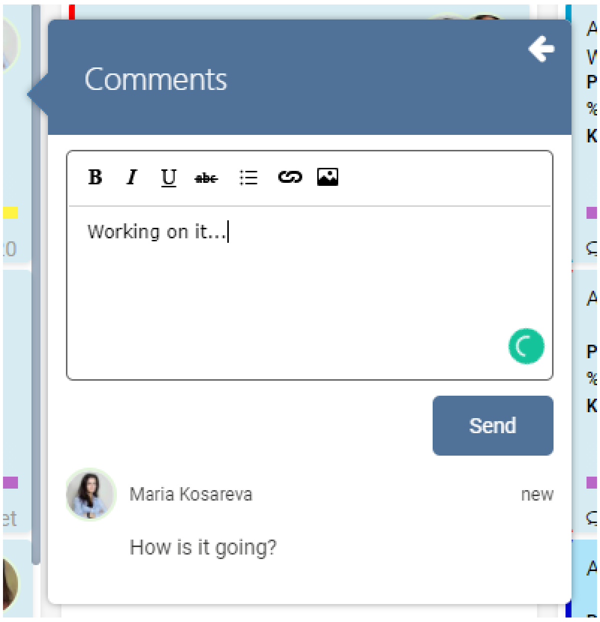


Now, you can select the field for comments in “Cards Setup” tab of Kanban Board and add it to Tooltip and Form. In the following example, a custom column “KanbanComments” was added.

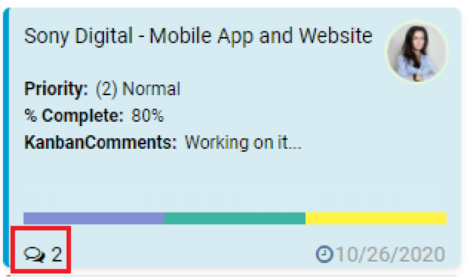




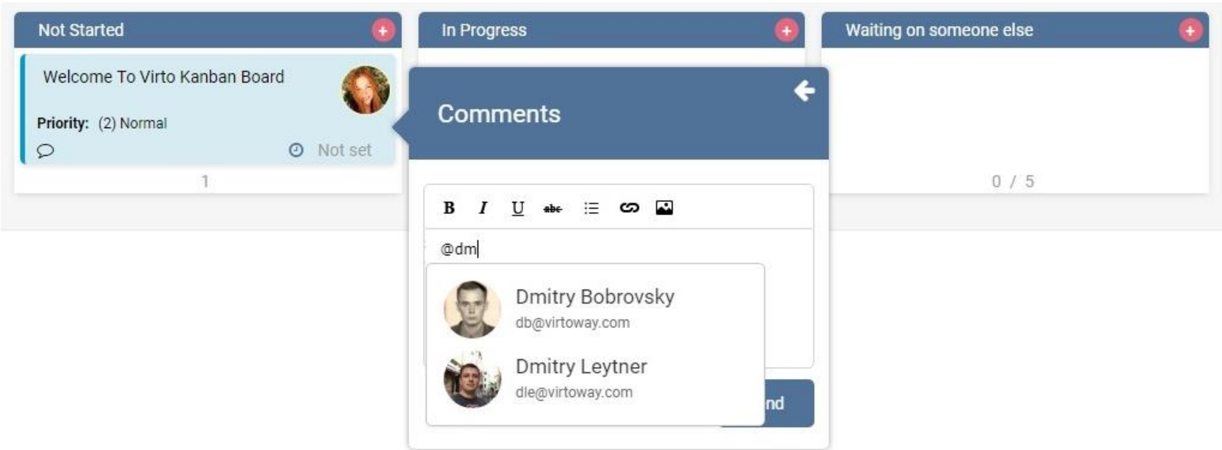
Now, comments are available from the task tooltip. You can format text, add pictures and links to comment text.



The count of task comments is displayed in the left lower corner of the task card.

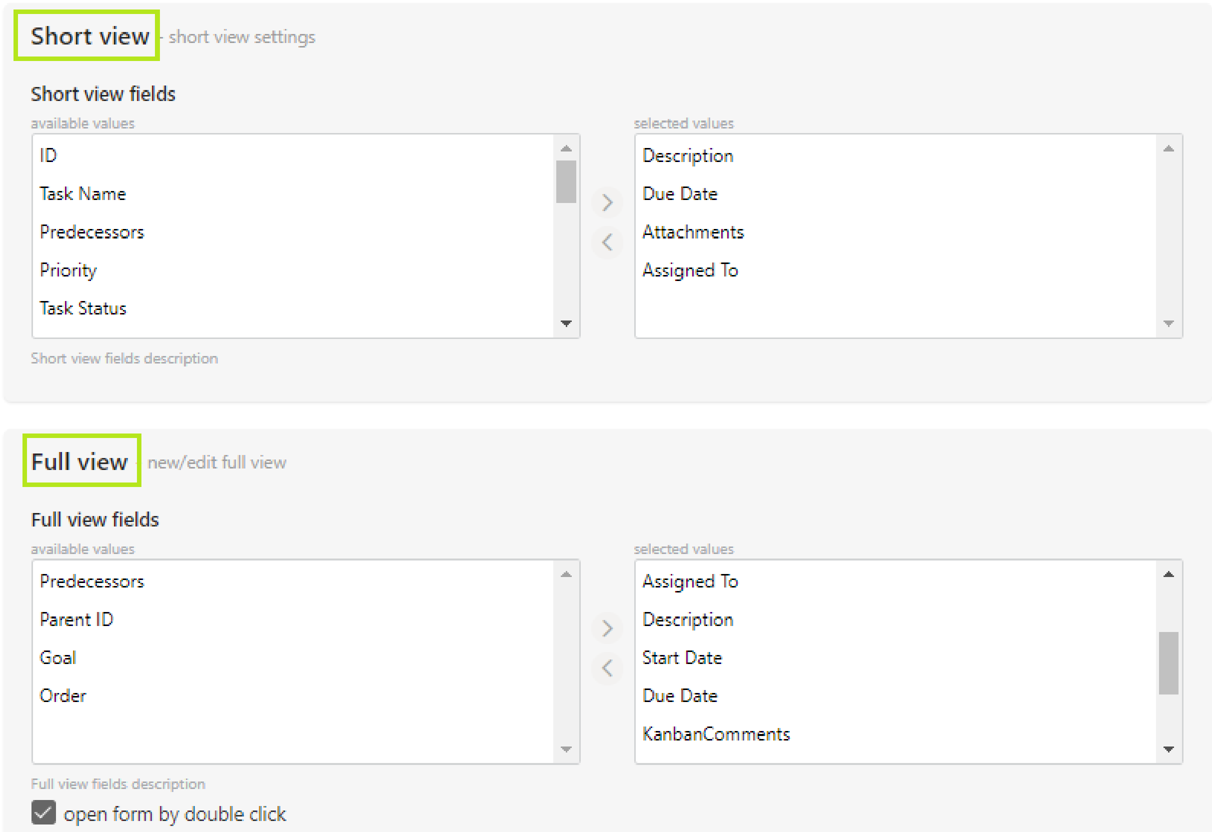


If a task requires someone's attention, you can mention this user by entering @ sign and choosing the name from the search suggestions. The selected person will receive notification about comment to the task, where he or she was mentioned. To enable this feature for board's users, you need to activate relevant notification in the board settings.



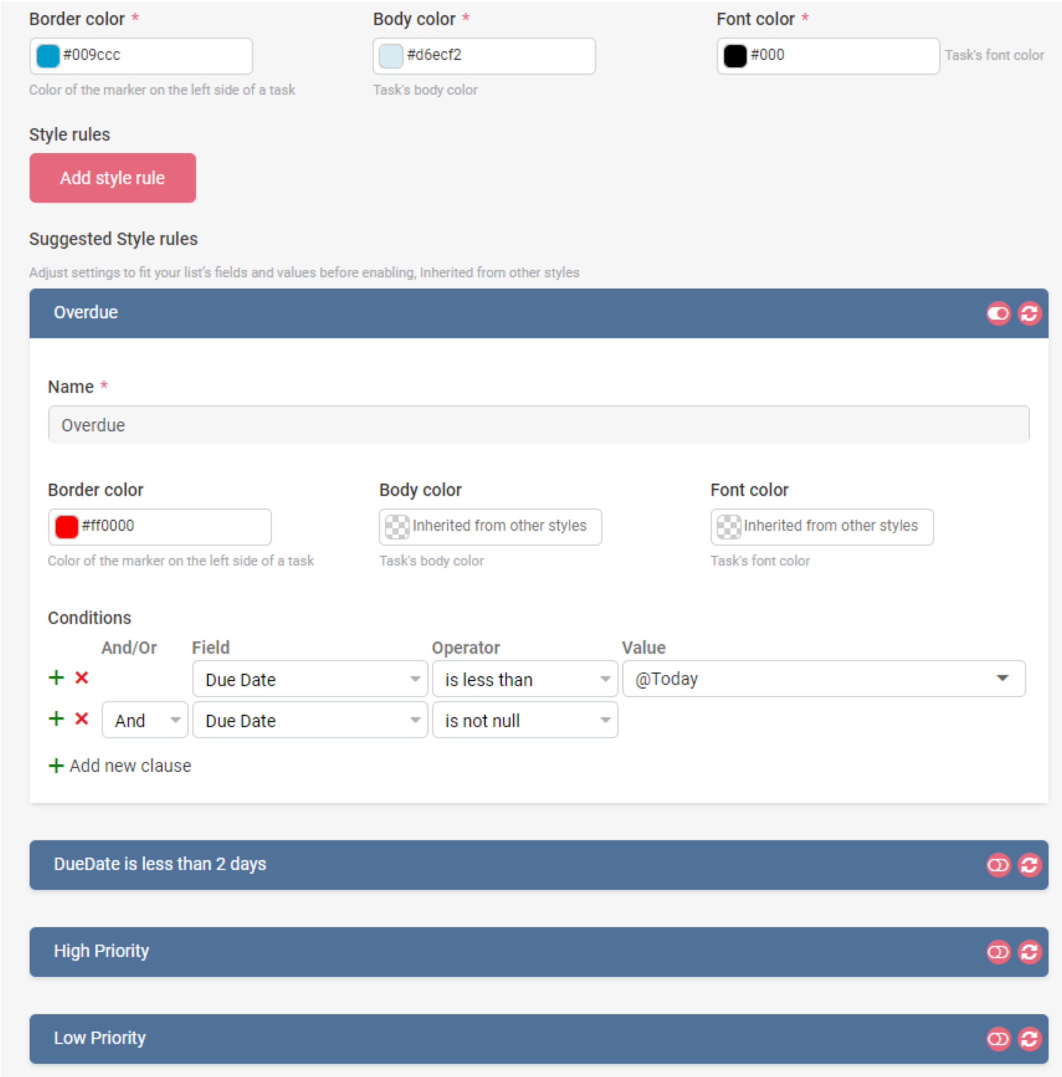
Short View/Full View

The **short view** is for the tooltip and the **full view** is for the edit form. Just remember it when you're changing the settings and decide which fields to show.



Styles

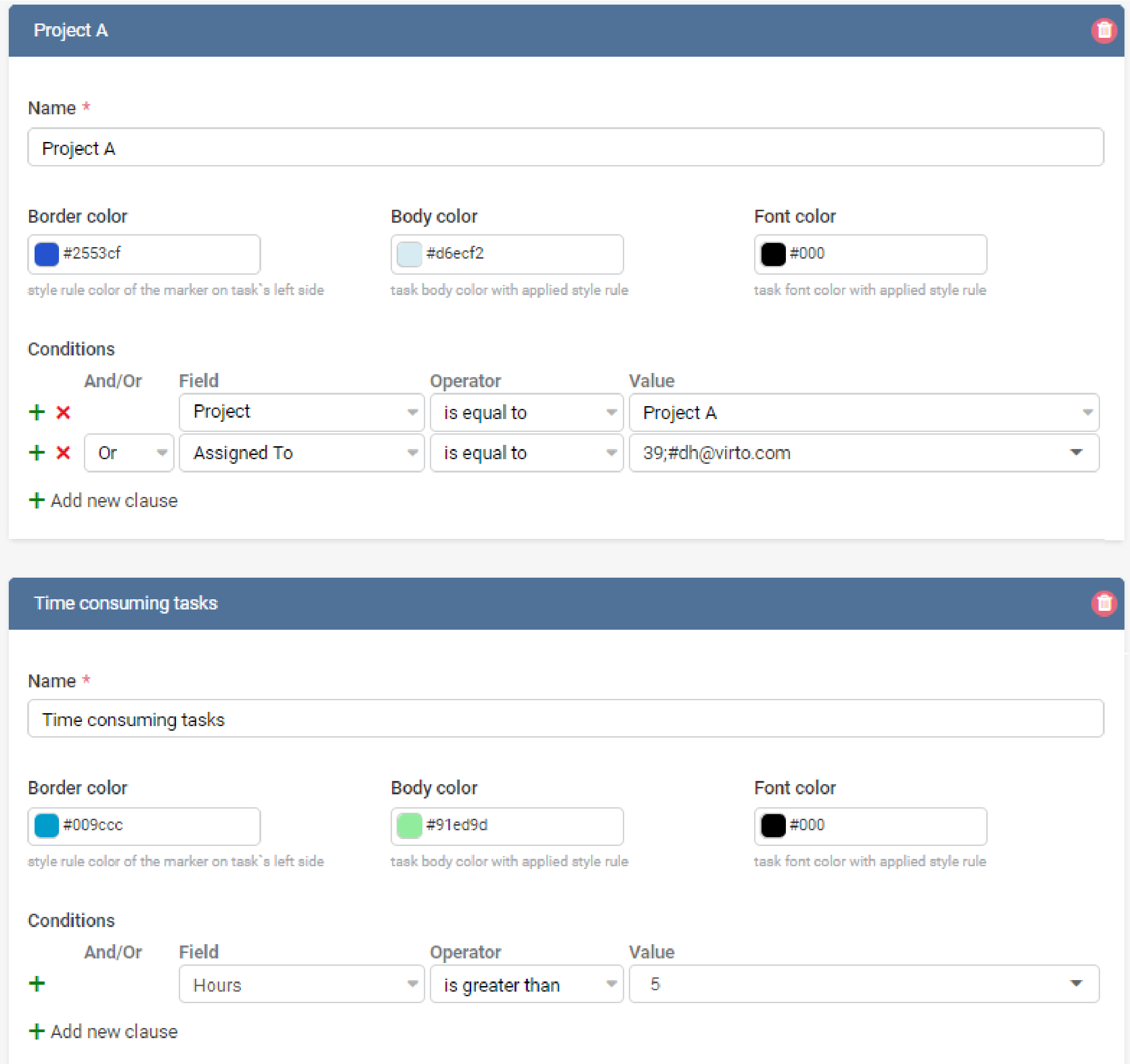
You can specify task card colors: body color, border color, and font color. There are default styles and ability to create custom ones.



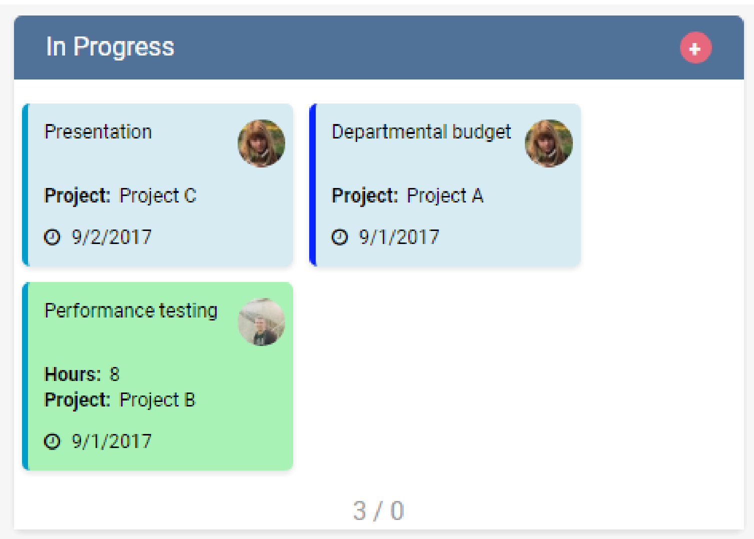
You can set custom conditions and color-code tasks according to a condition rule. There are 4 suggested style rules already customized. You can disactivate these style rules or enhance them with additional information (use reset button to apply new rule).

To create a new condition, click "Add style rule".

In the first example, the deep blue border marker is applied to all tasks from “Project A”.
In the second example, the green color marker is applied to body color of all tasks lasting longer than 5 hours.



If the condition is true for the task, it will look like the example below.



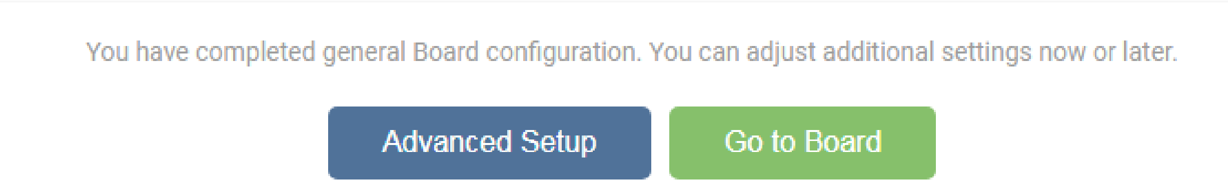
You can create another condition by clicking on "+" or delete condition by clicking "x".

If you have selected several lists to be displayed on this board, you can apply the list filter and create a precise multi-step condition for a particular list.

Note: *if you create several style rules and a task matches more than one rule, only the first rule will be used.*

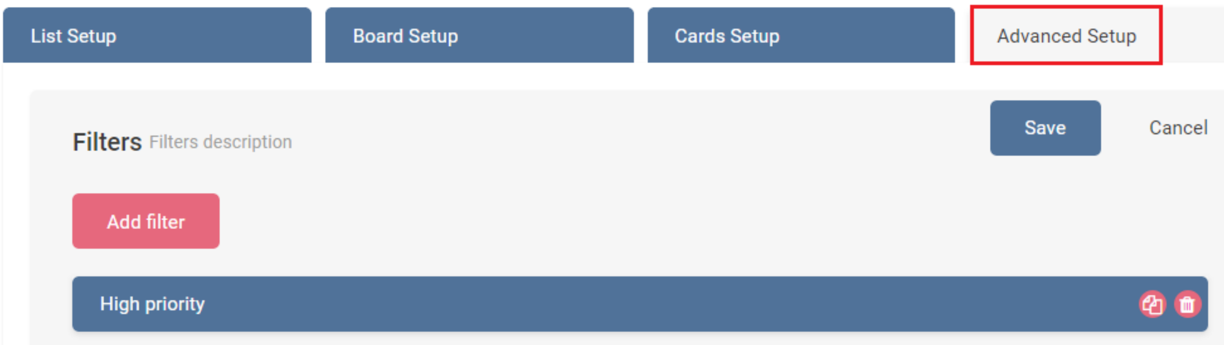
Note: *you can use drag and drop feature to place one of the created rules above the other rules and make this first rule prioritized.*

Now you can save this board or proceed to advanced settings.



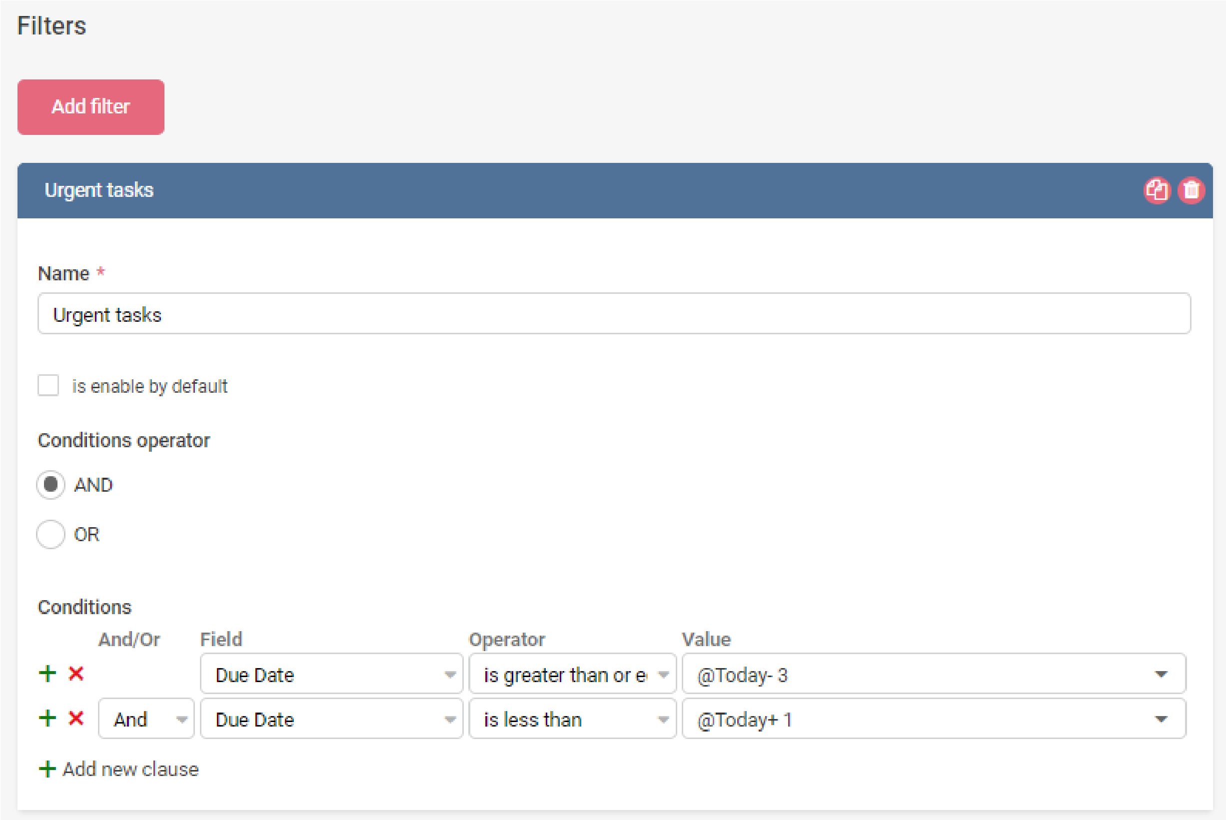
Advanced Setup

Use advanced setup settings block to complete the board adjustment. This is not required, but may be quiet useful for most cases.



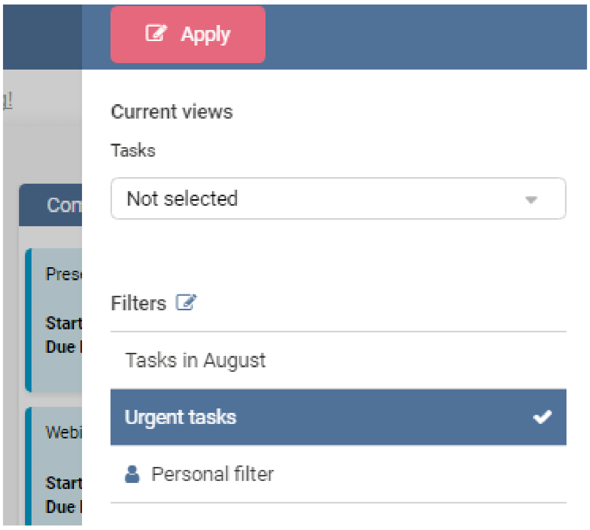
Filters

You can adjust filters for tasks. Click “Add filter” and define custom conditions. Check the box “is enable by default” to apply filter to default board view.



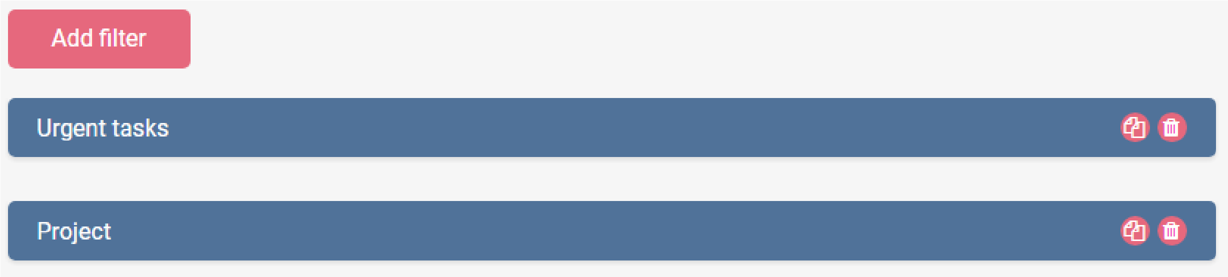
A date filter allows you to choose the date limitation manually. Today +1 is tomorrow, Today -7 is a week ago, etc. You can change "-" to "+" and type any other number of days.

To apply the new filter, click "Filters" on board and choose an appropriate one. Then click "Apply".



If you choose multiple filters, all the tasks that fit the selected filter will be shown. If you need to make a more detailed sorting, use required filter conditions in a single filter. Just click "Add new clause" and create new sorting option for the same filter.

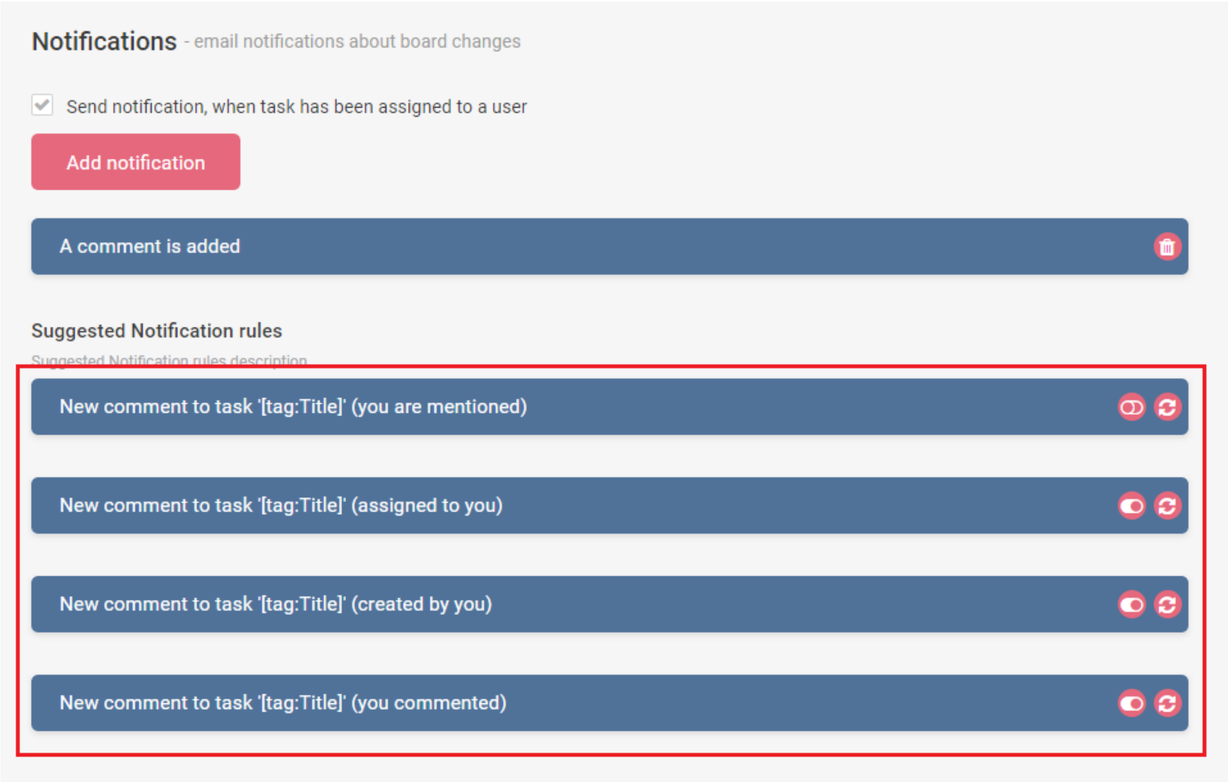
You can copy or delete a filter, using the icons in the right upper corner of a filter.



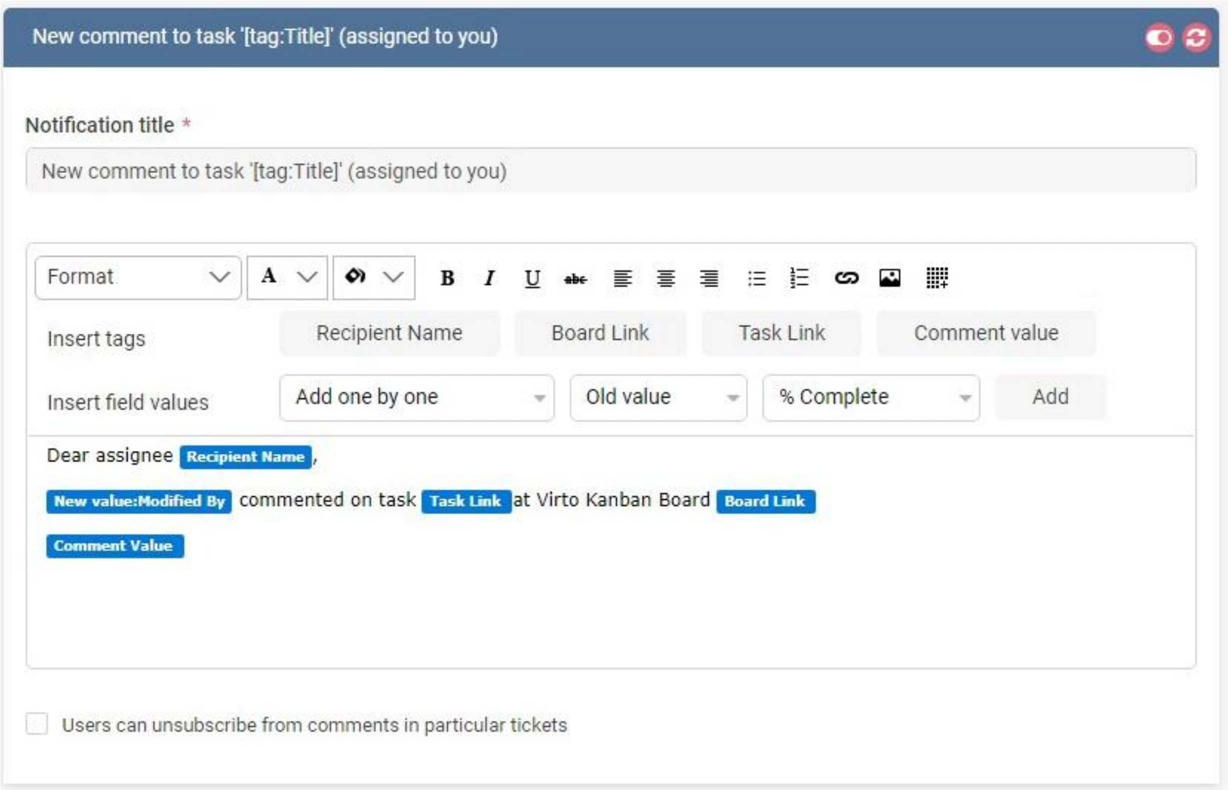
Notifications

You can create email notifications about any Kanban board changes. Create conditions and define the list of users who will receive email notifications concerning these changes.

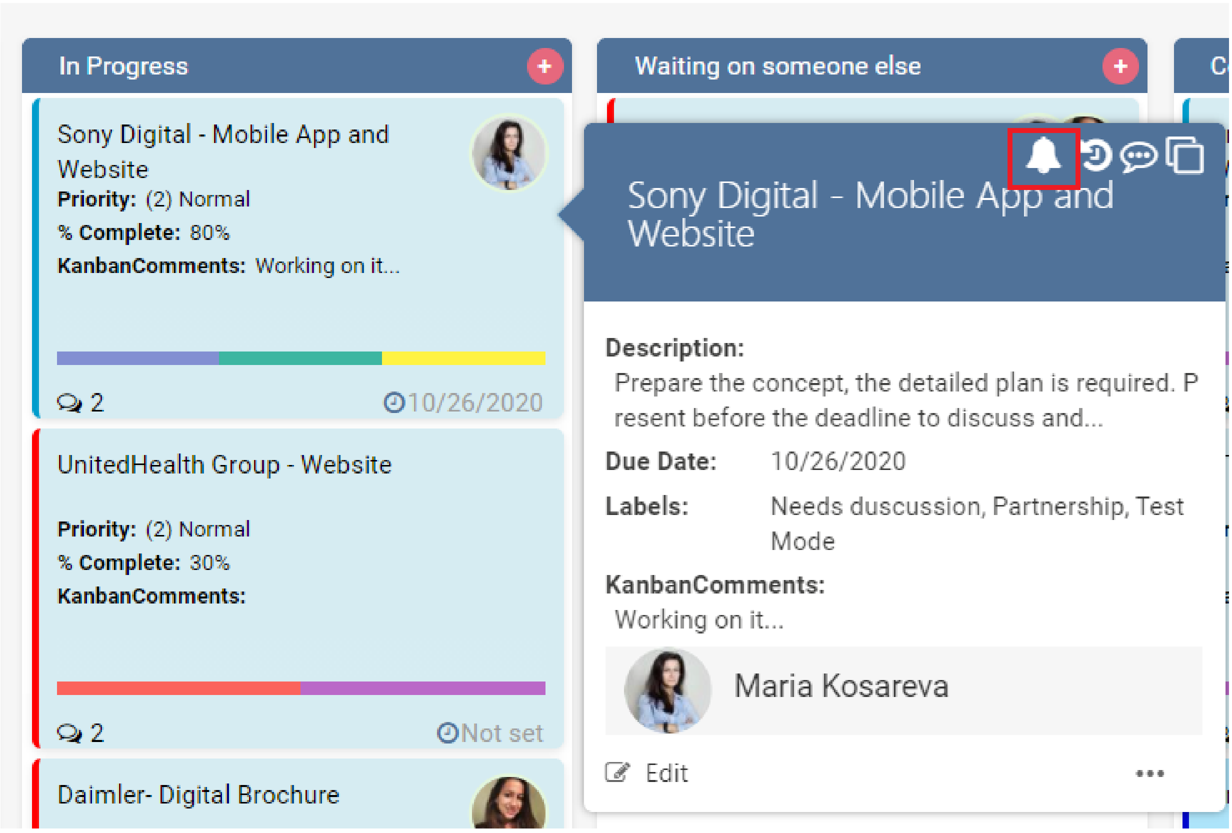
There are 4 default notifications which inform about new comments.

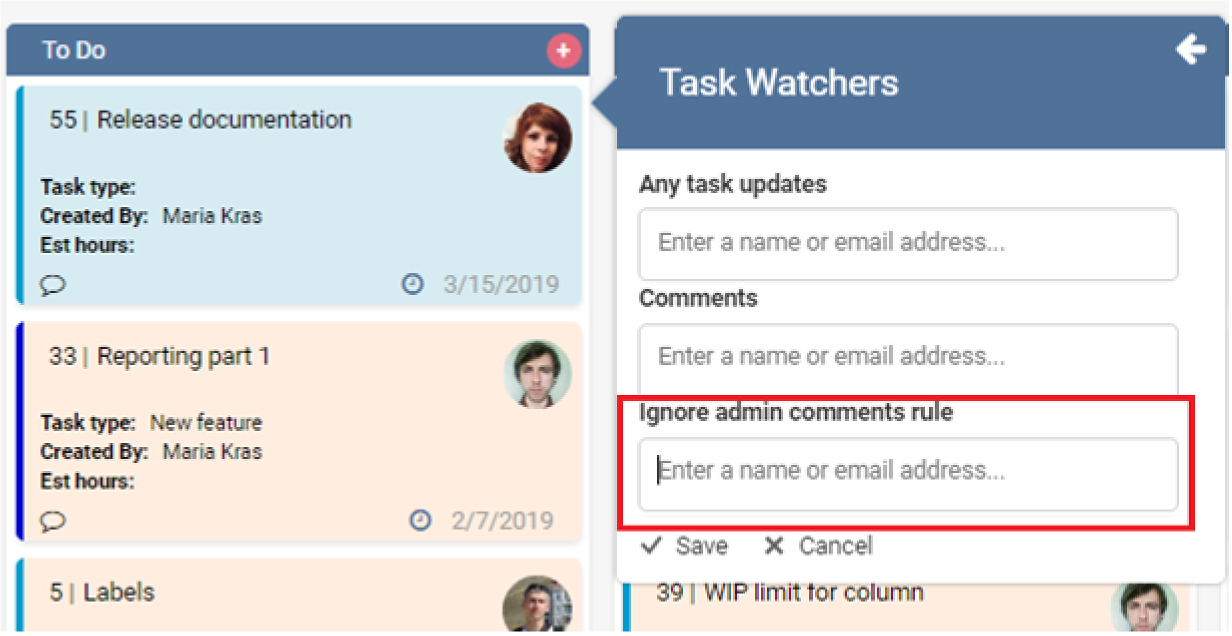


These notifications have customized email body.

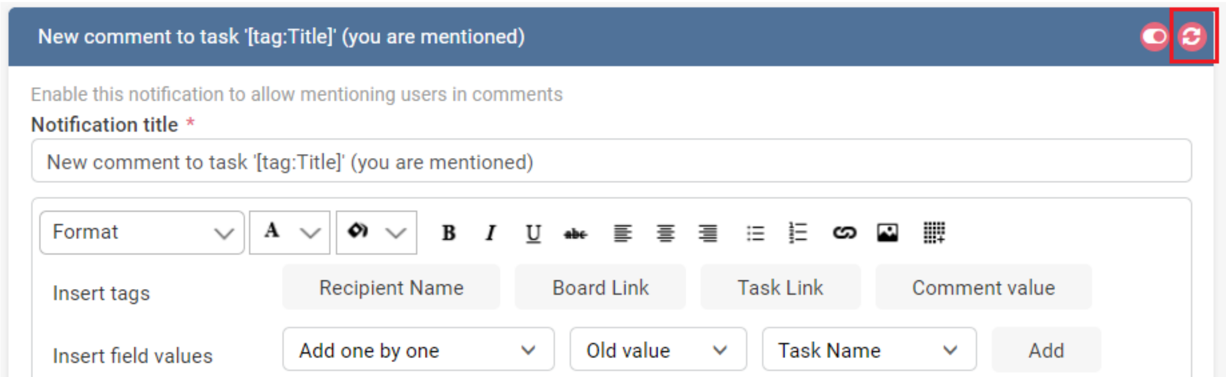


You can allow users unsubscribe from these alerts using checkbox "Users can unsubscribe from comments in particular tasks". In this case, users can enter their email in "Task Watchers" pop-up to unsubscribe from current task notifications. Click the bell icon in the tooltip.

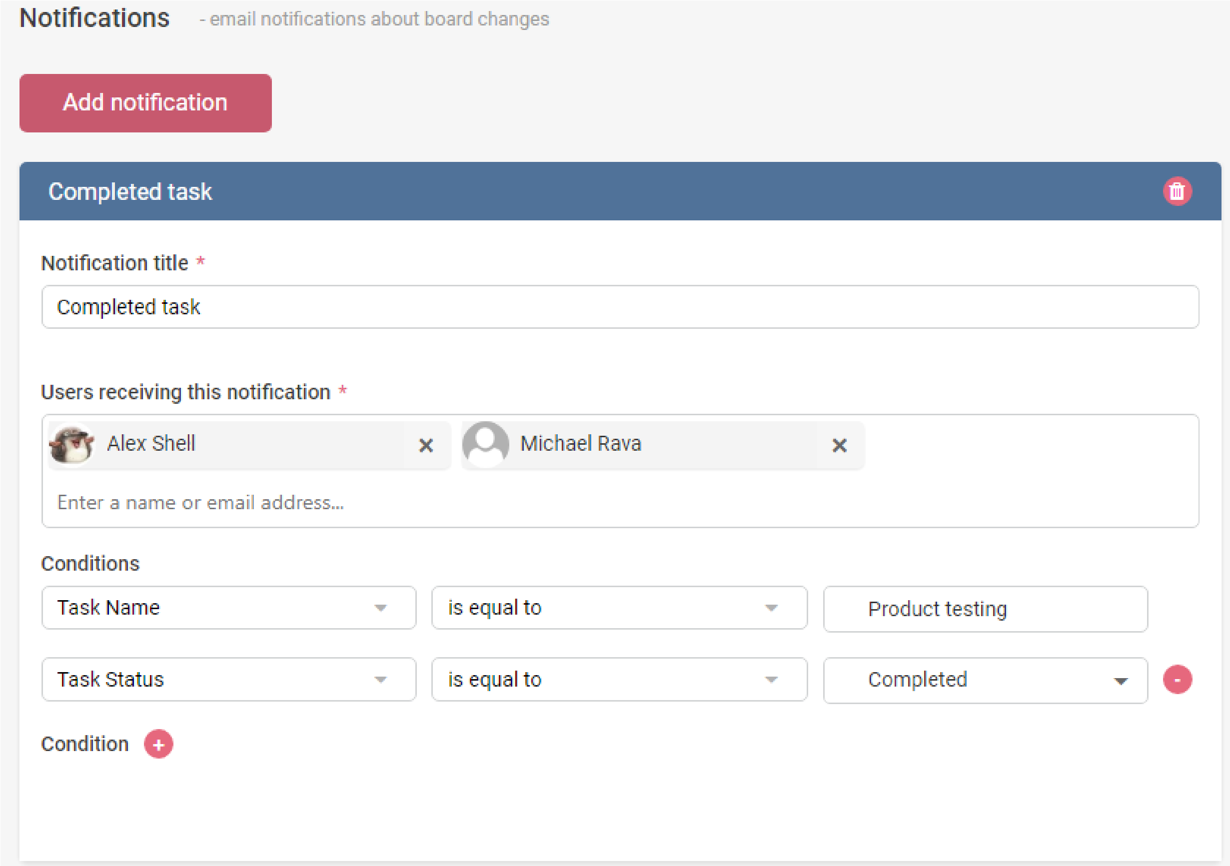




You can also deactivate these notifications or enhance them with additional information (use reset button to apply new notification form).

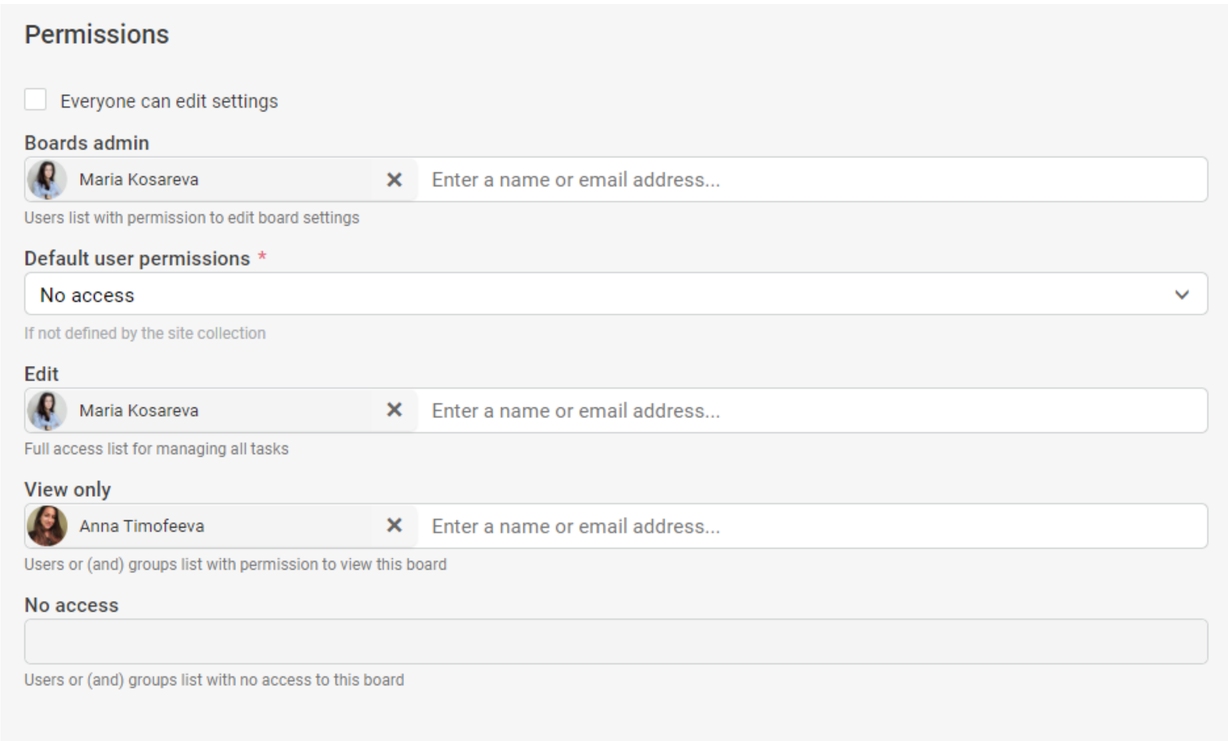


In the following example, 2 users will receive notifications when the “Product testing” task will be completed.



Permissions

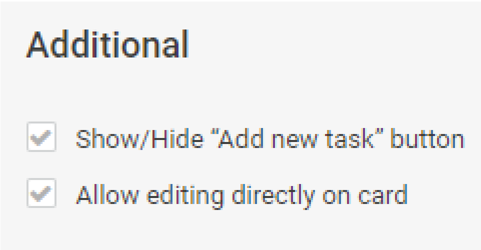
You can define board admin, set default permissions, define users with edit/view/no access rights.



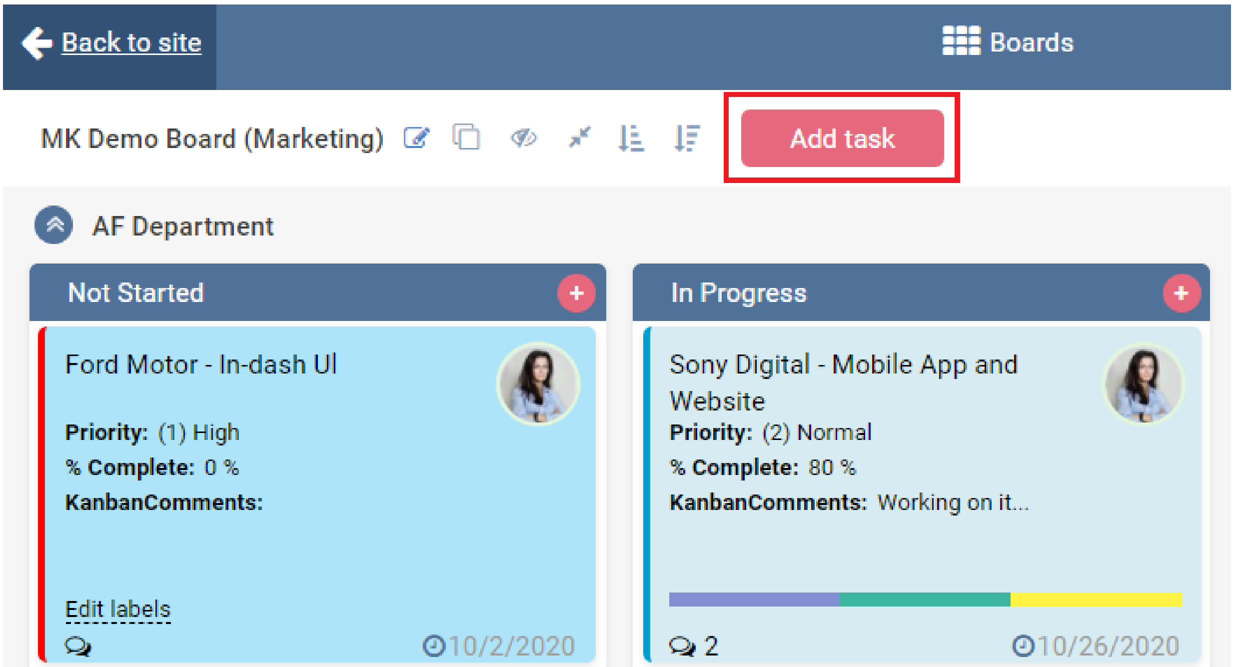
Please check for detailed permissions information in the ***Virto Kanban Board Permissions Guide***.

Additional

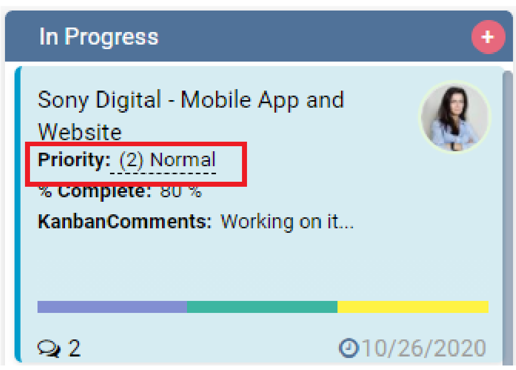
Additional options are placed int this block of settings.

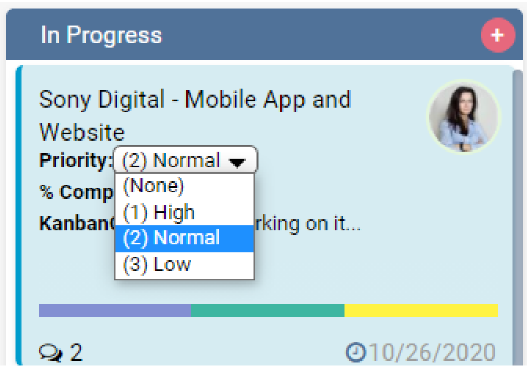


Select the checkbox "Add new task" to show the add button on the board.



The "Allow editing on card" option allows to edit task values right from the card. If you pit a cursor on the field in the card and it appears as underlined, you can edit thie field right on the card. Use this option to edit task fields without opening the full edit form.

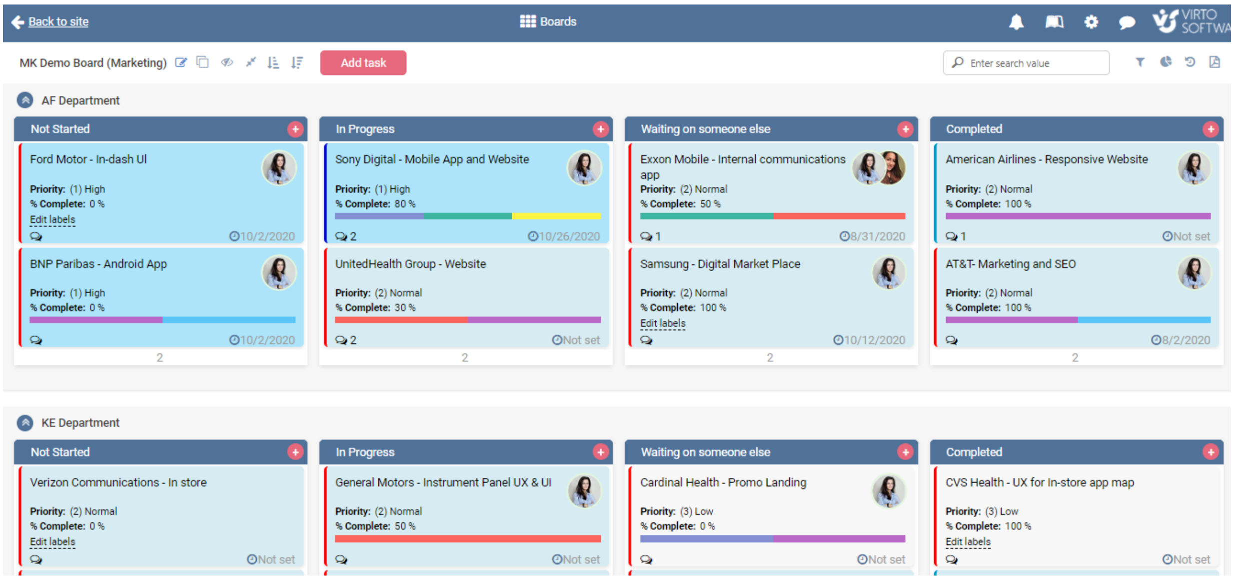




Using Virto Office 365 Kanban Board App

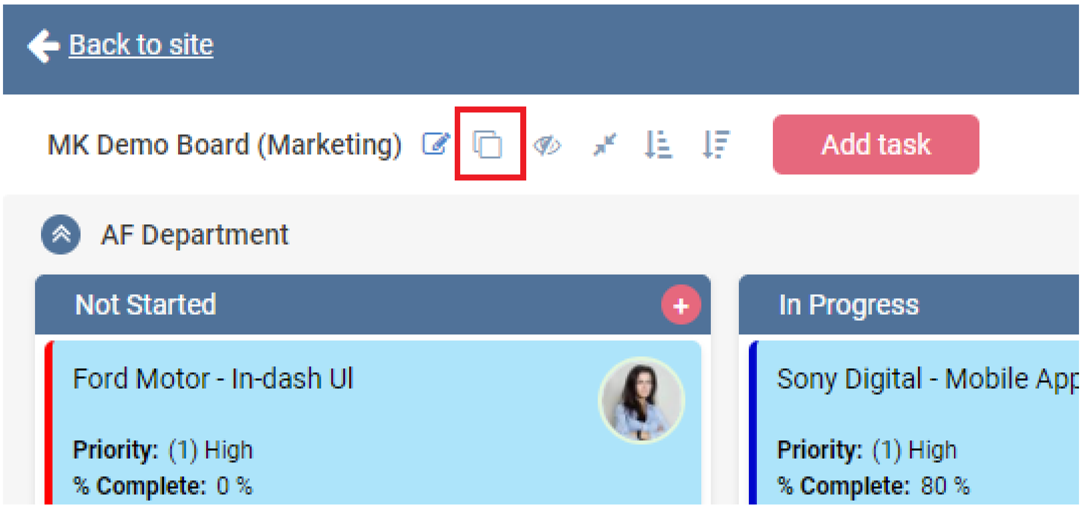
Managing Tasks

Virto Office 365 Kanban Board App allows users to manage tasks grouped in columns and rows (swimlanes) according to their values.

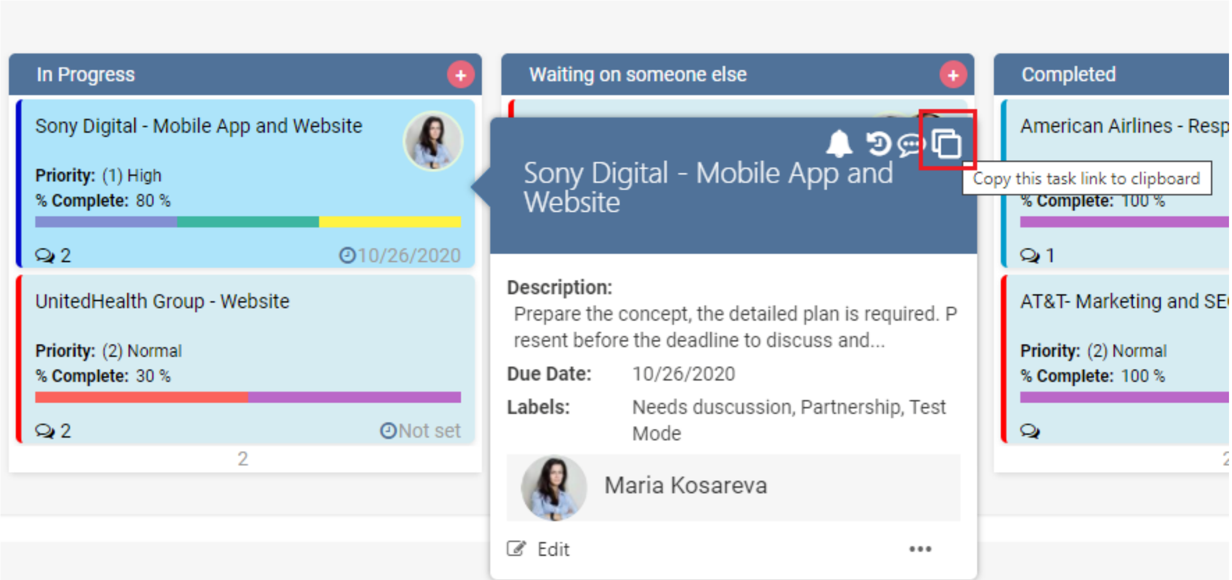


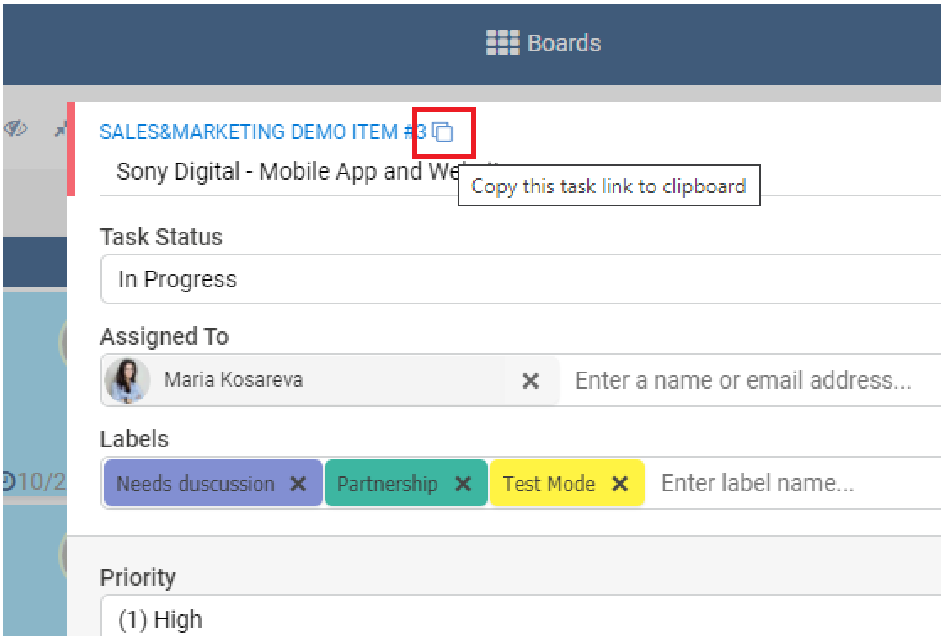
Copy to the Clipboard

Use the “Copy” button on the board header to copy the board link to your clipboard.



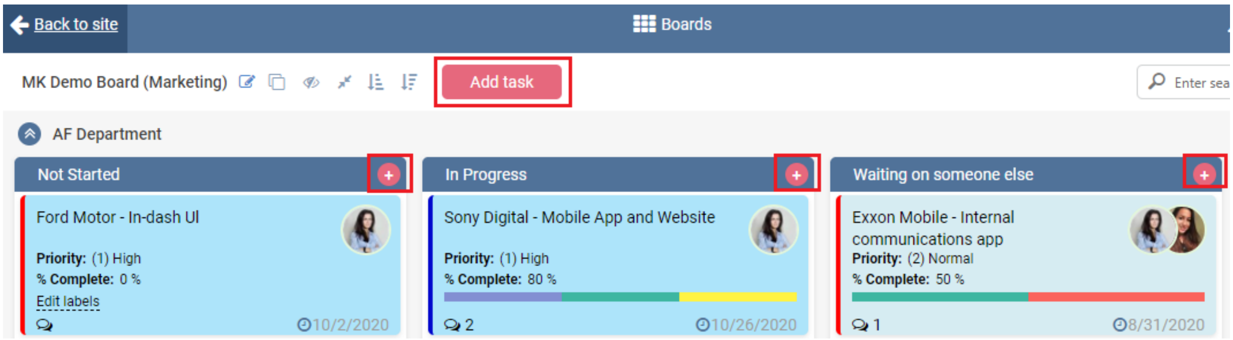
You can also copy link to a task from the tooltip or task edit form.



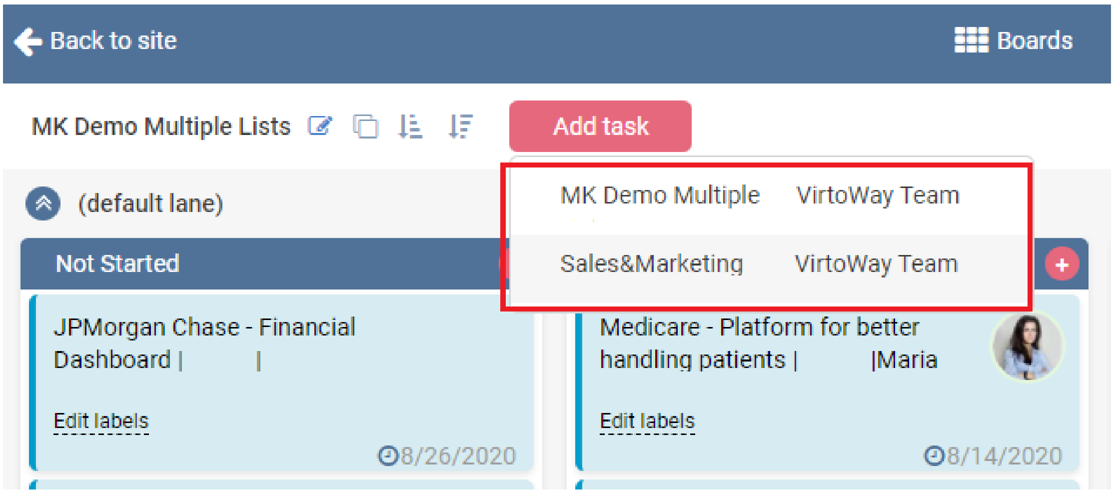


Add Task

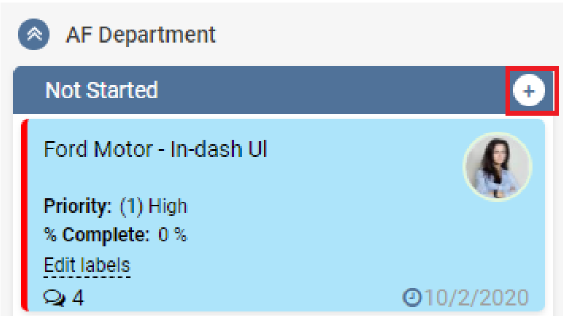
Use "Add task" button to add new tasks to this board.



If there are multiple lists added to the board, select a list where this task should belong to.

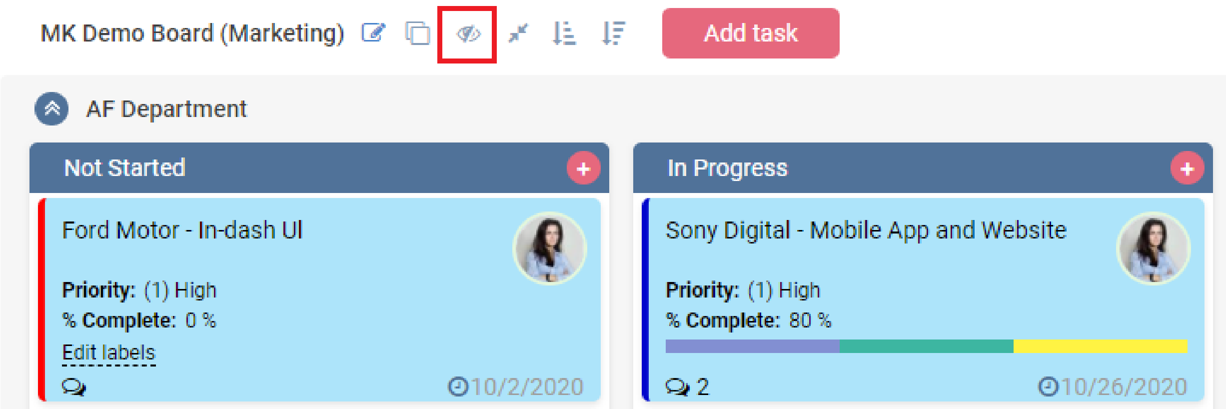


You may also use "+" to add a task directly to a required column or swimlane.

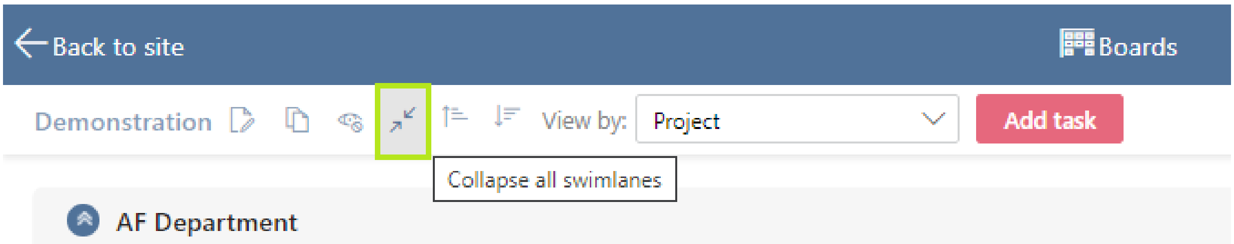


Hide/Collapse Swimlanes

Use "Hide empty swimlanes" button to hide all swimlanes that do not contain any tasks at the moment.

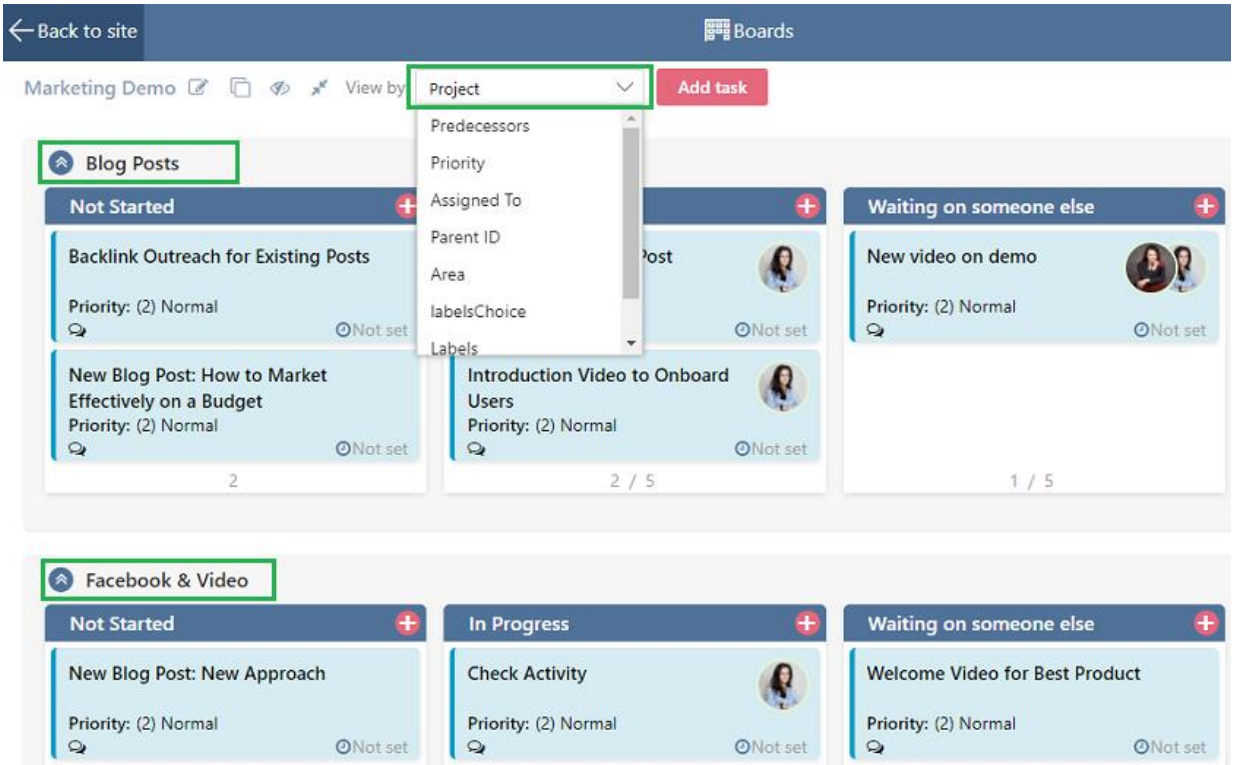


You can collapse or show all the swimlanes at once. Use the special icon.



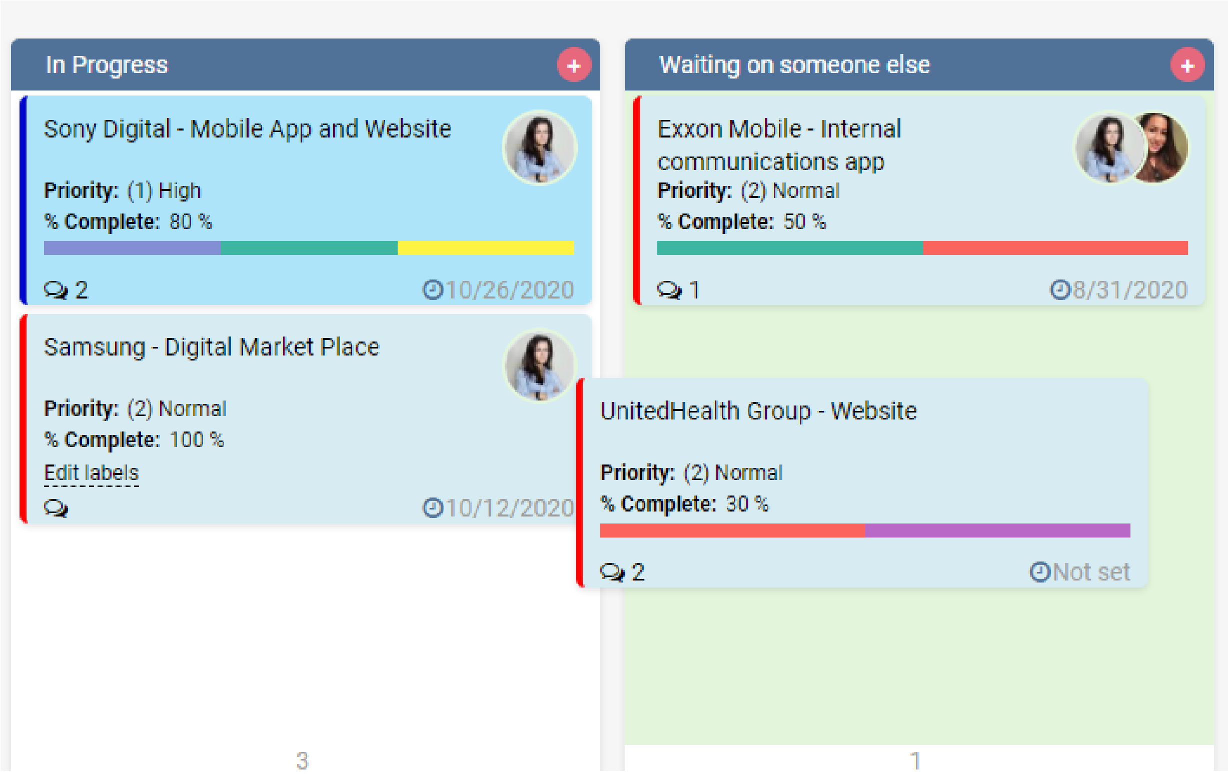
Switch Swimlanes

You can change the field directly on the board and view tasks grouped in swimlanes. No need to open the settings and make modifications. Just choose the swimlane field from the dropdown.



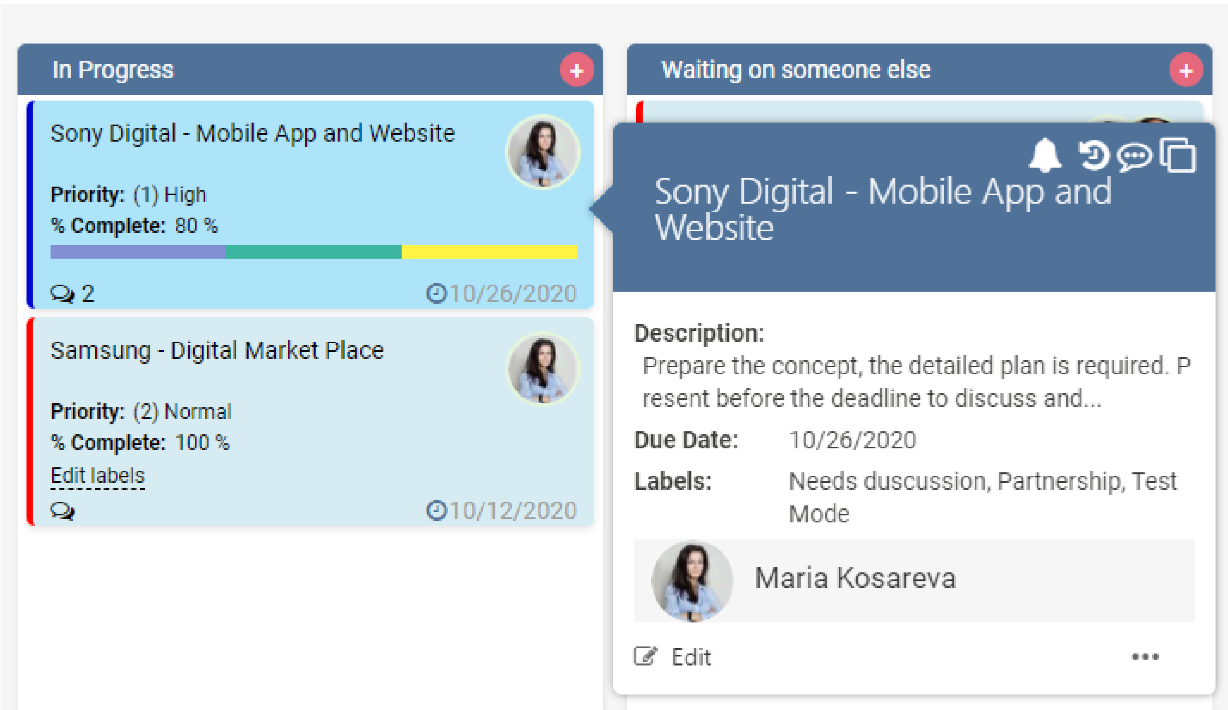
Move Task

To change the value (usually, status) of a task, drag and drop this task to the required column or row.



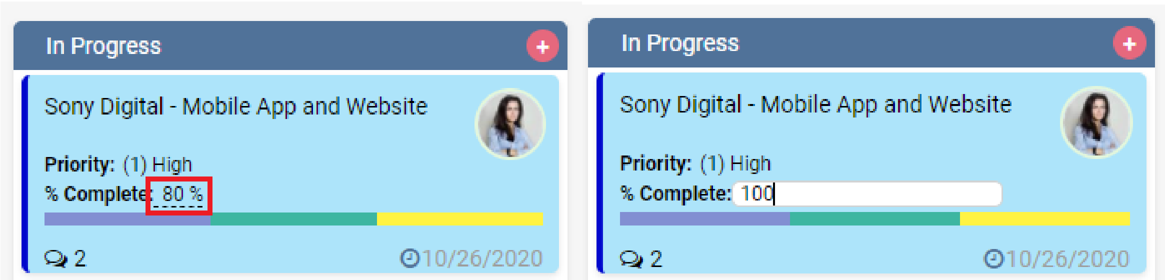
View and Edit Task

Click a task to view brief information about it in the tooltip.



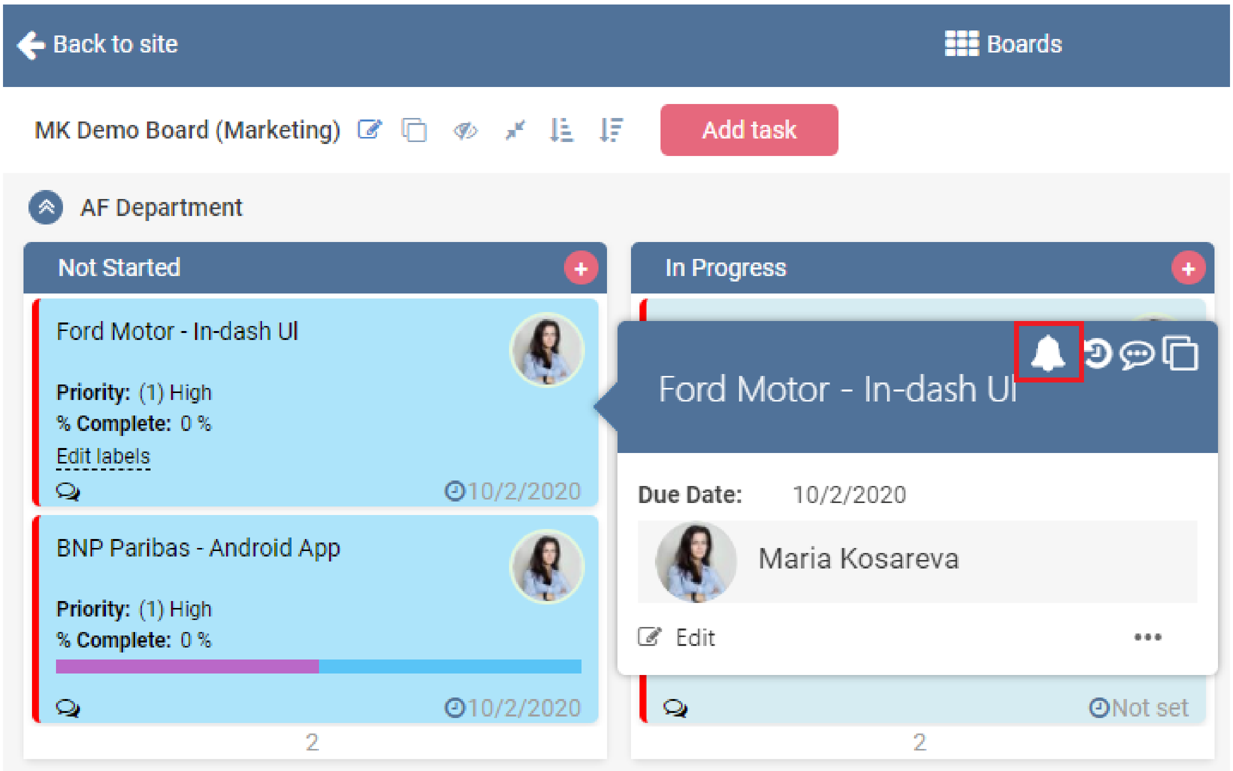
You may edit task from a full Edit form or right on the card if you have enabled option "Allow editing on card" in the settings. You can edit card fields underlined by a white dotted line. With this option, users may edit task fields without opening the full edit form.

***Note**: by the way, if you change the percentage complete to 100, the task will be automatically* *moved to the "Completed" column.*

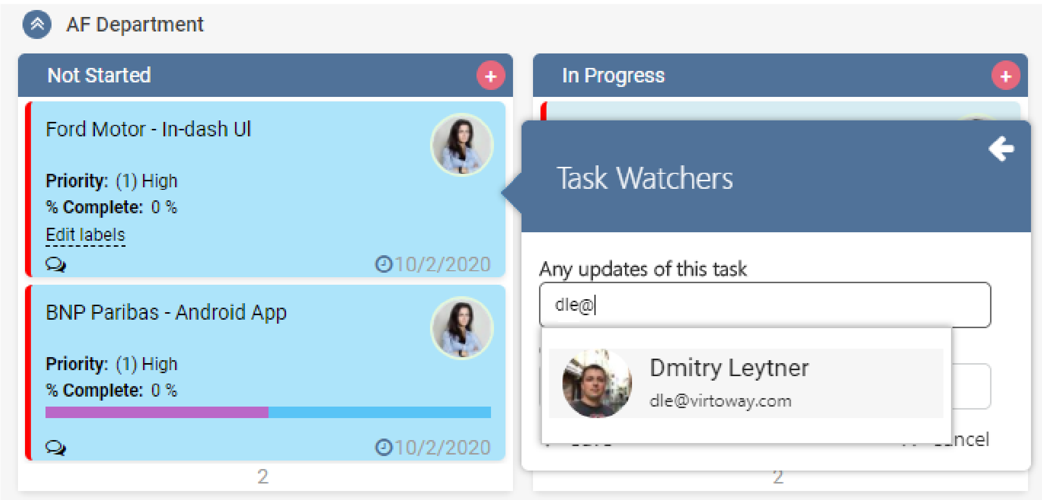


Task Watchers

Click on bell icon in the right upper corner of ϕ task tooltip to assign task watchers.

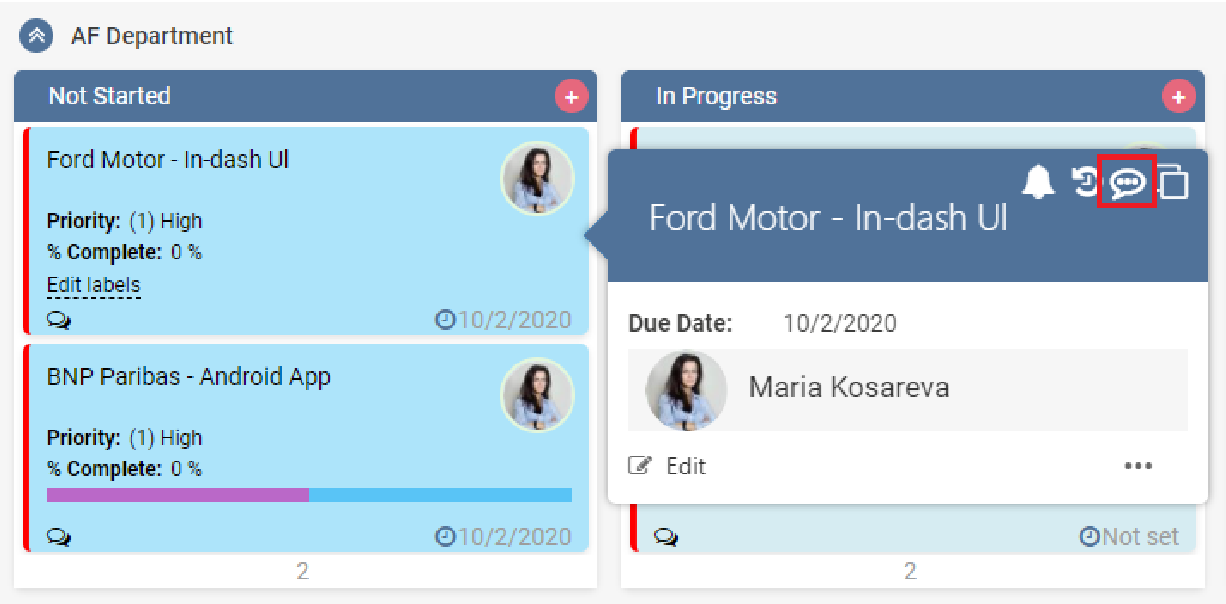


Task watchers receive email notifications about any changes in this task.

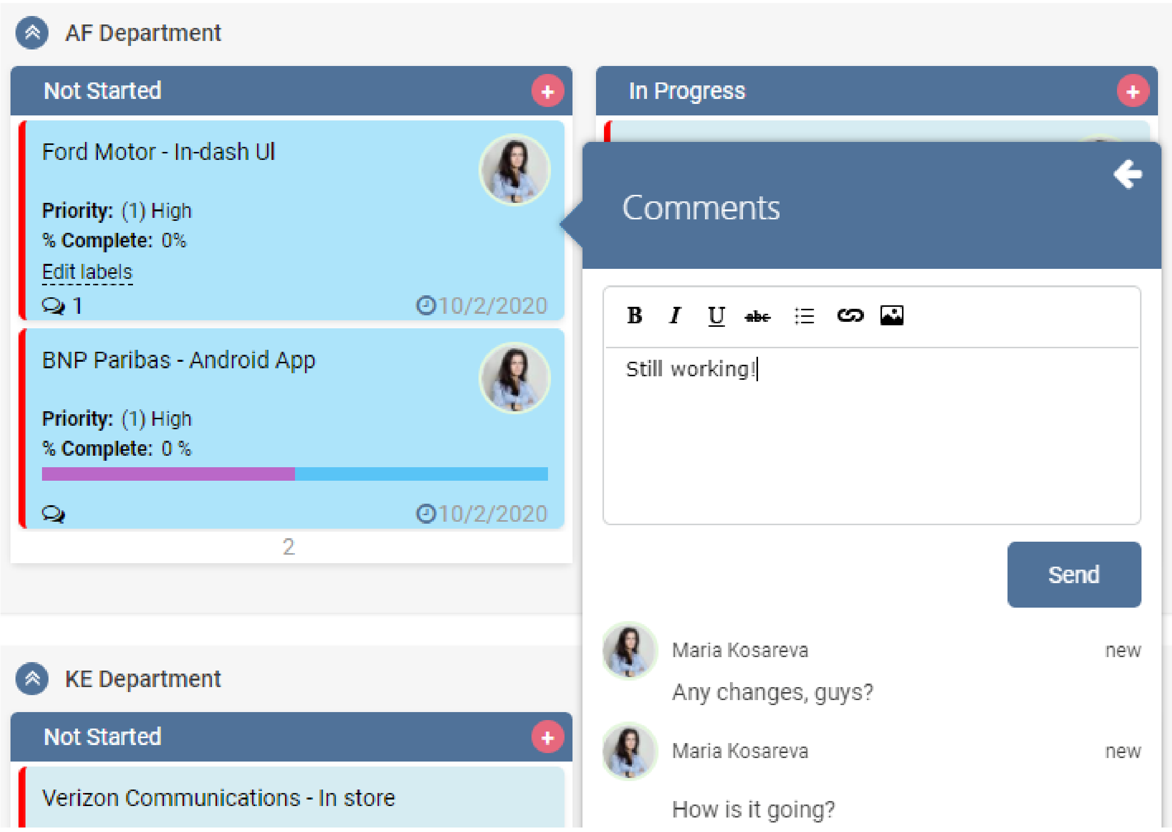


Leave Comments

You and other users can leave comments to the board tasks. To add a new comment, click comments icon on the tooltip and start typing.



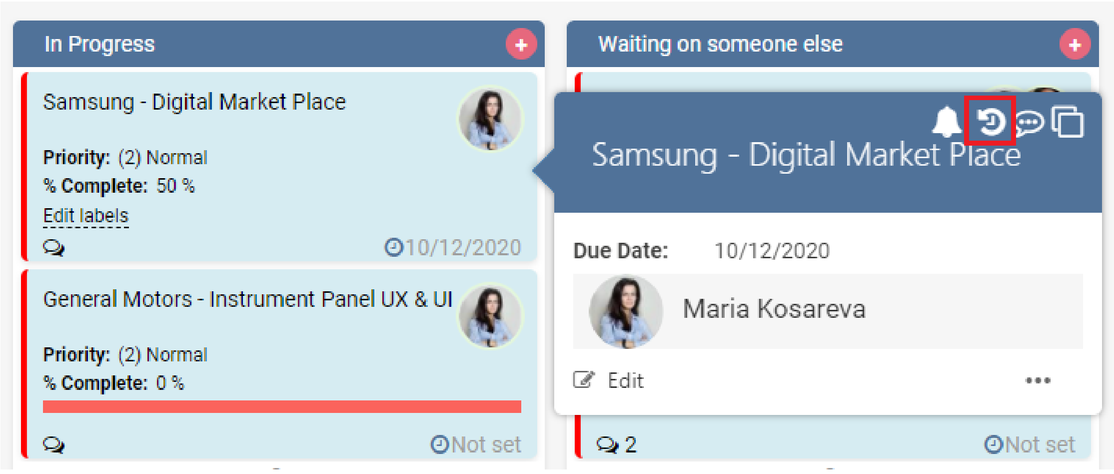
The comments history will appear in the tooltip as well.



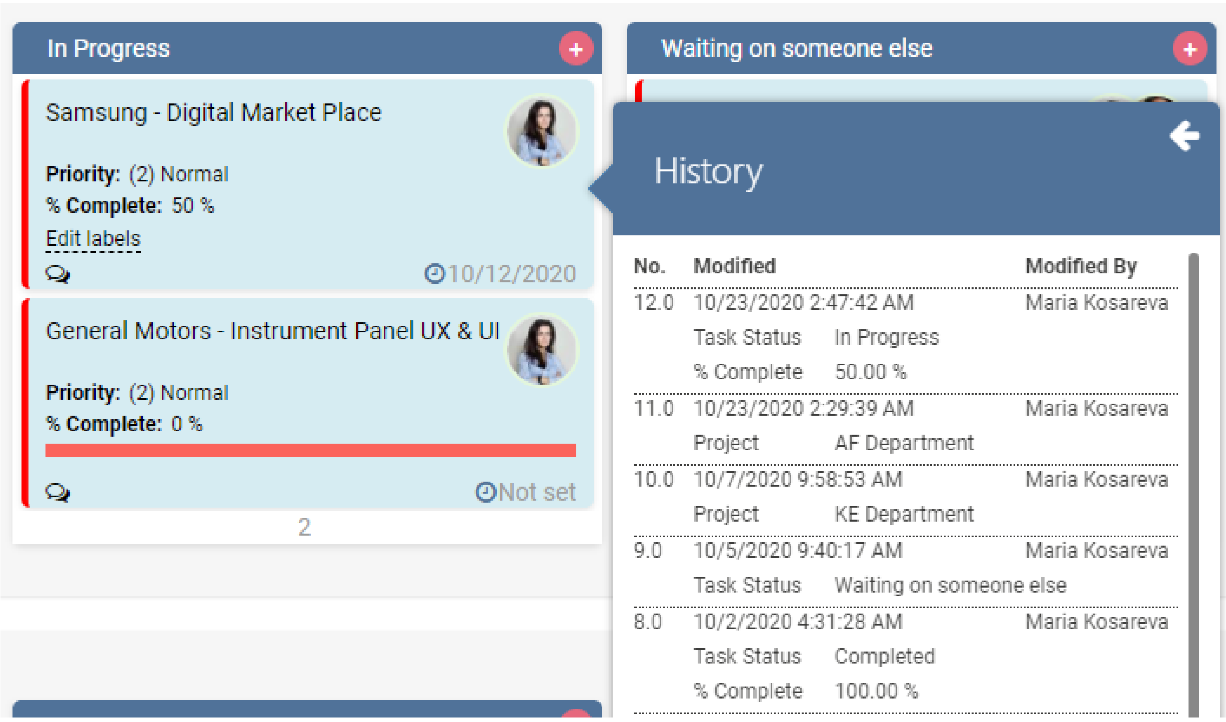
Task History

Task history is available for tasks in the tooltip pop-up.

Note: *make sure the "Item Version History" option is enabled in the list versioning settings.*



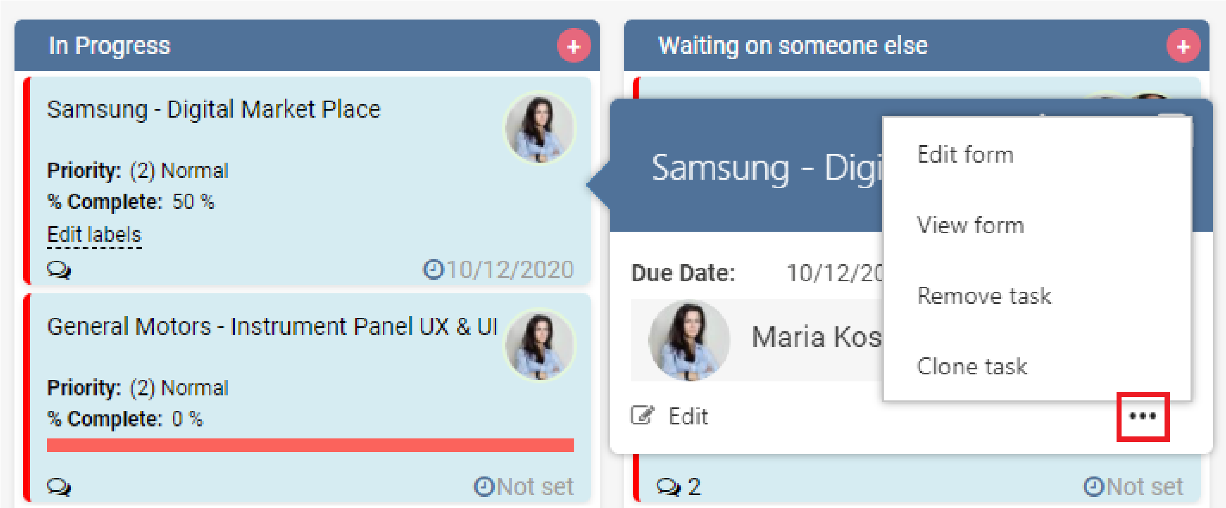
This way, you can track the task history and see all the changes.



Note*: any changes of attachments and pictures are not displayed in both task and board history.*

Edit/View Form and Remove/Clone Task

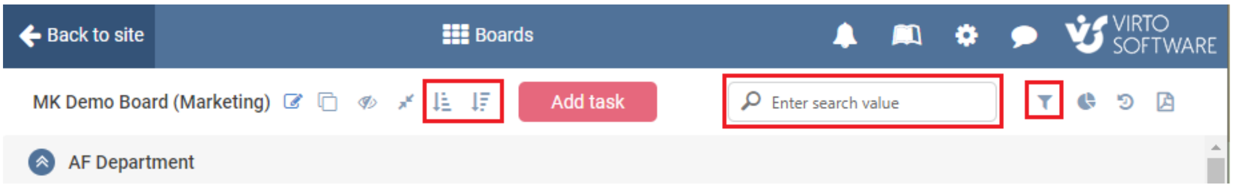
There are additional actions available when you click on dots in the tooltip: you can open edit or view form, remove task or clone it. When you clone a task, it is opened in a new task's edit form that contains all field values from the cloned task.



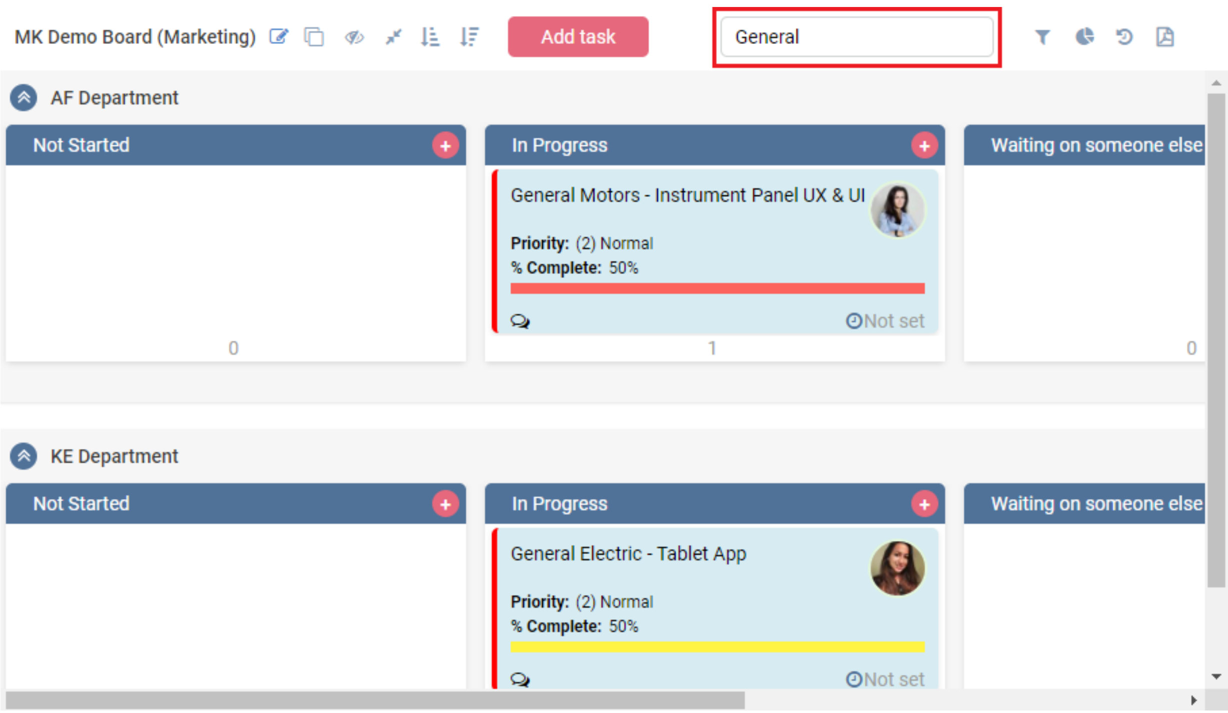
Note: *Attachments and images can't be transferred to a cloned task.*

Task Filters

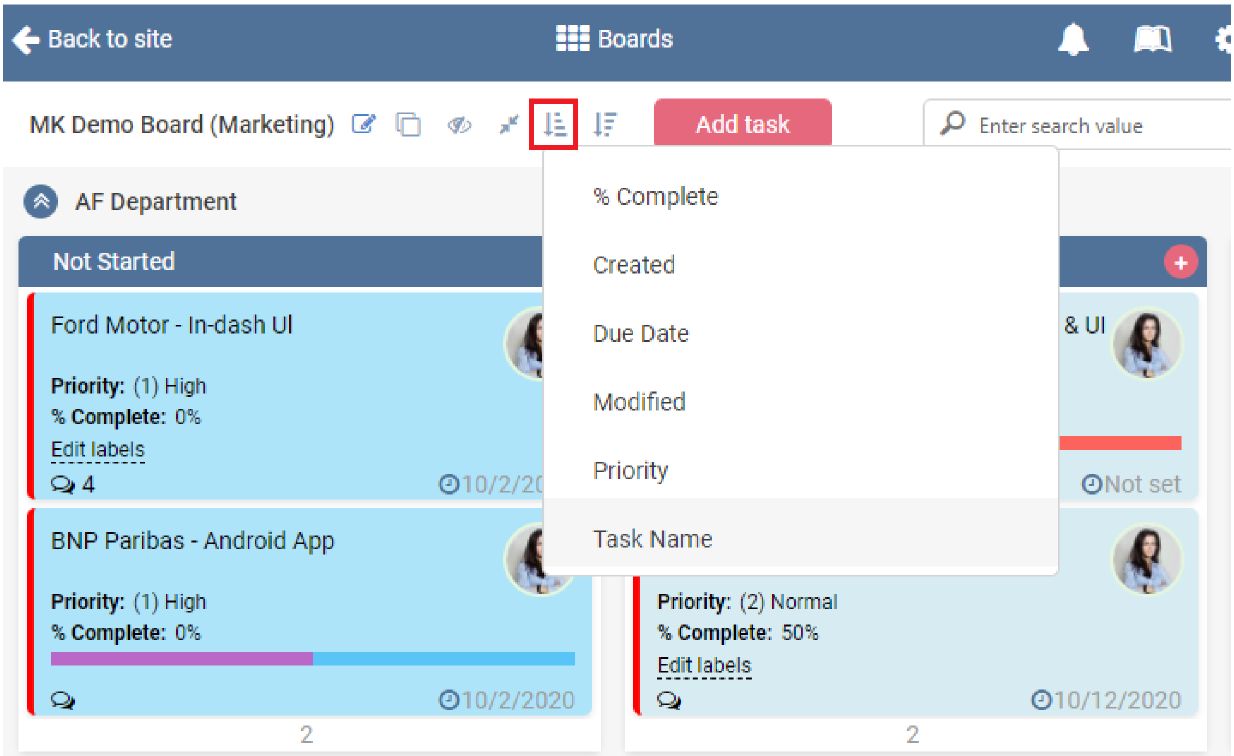
There are the following filtering options available for the Kanban Board: search control, sorting, and more specific condition filters.



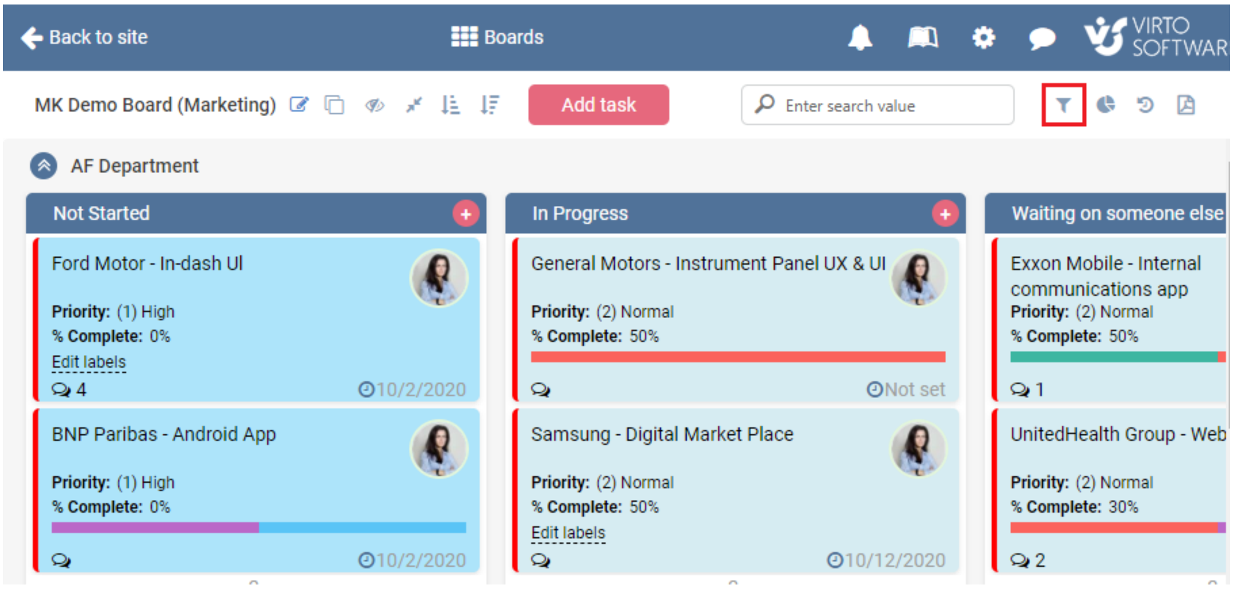
Search control allows you to show only tasks matching to any entered task values (text, numbers, and symbols) that are displayed on cards.



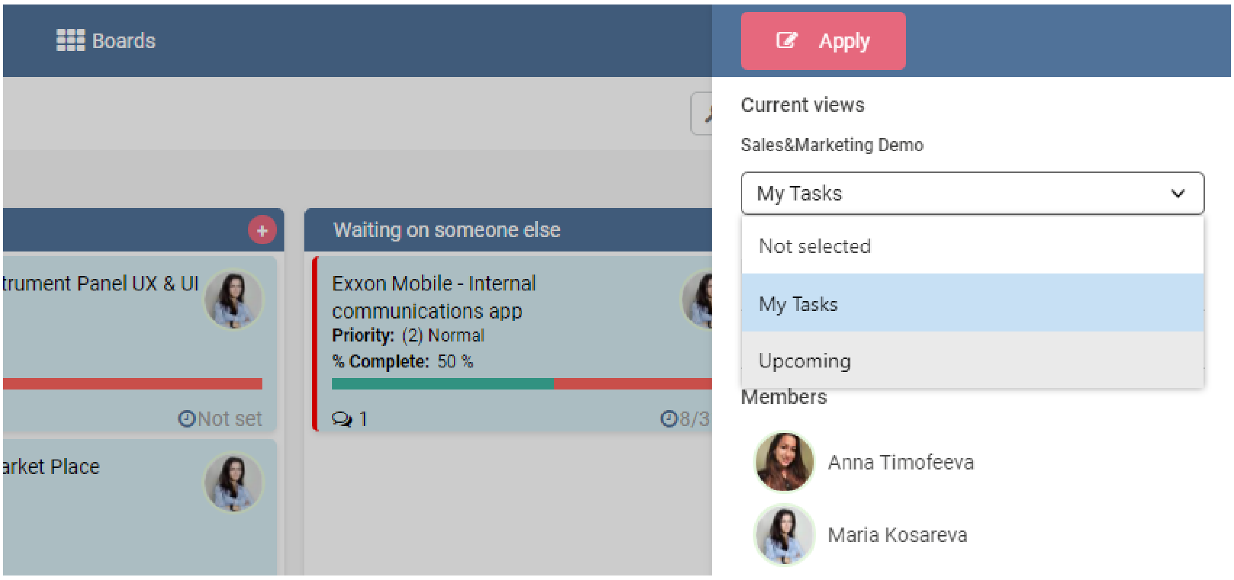
If you enable tasks sorting according to a specified field in the settings block, you may apply this filter on Kanban header and sort tasks in ascending and descending order by the selected field.



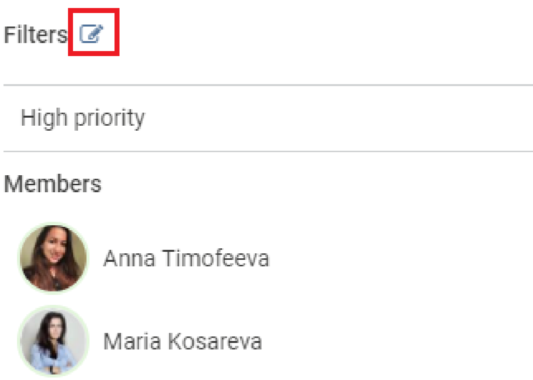
Click “Filters” icon in the right upper corner to open filters.



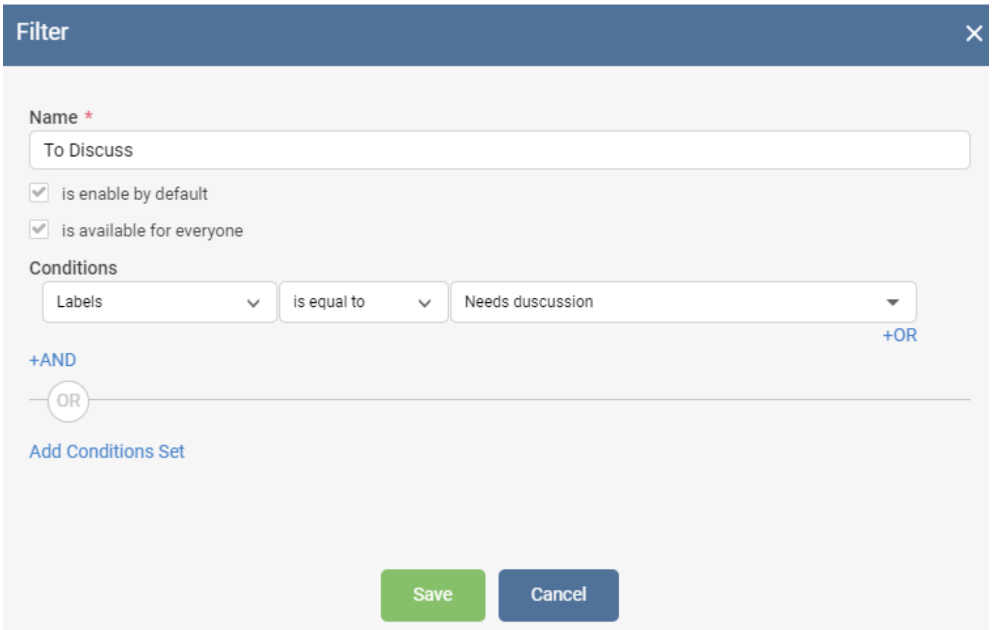
Select the required list view from the dropdown to filter tasks on the board. This option is available only if a view filter is adjusted in Settings.



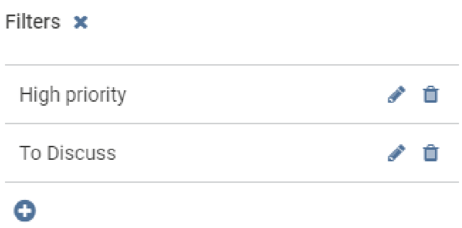
You can use custom condition filters created in the app settings ("Advanced Setup" block) or create a new filter from the board view, using the edit button next to filters.



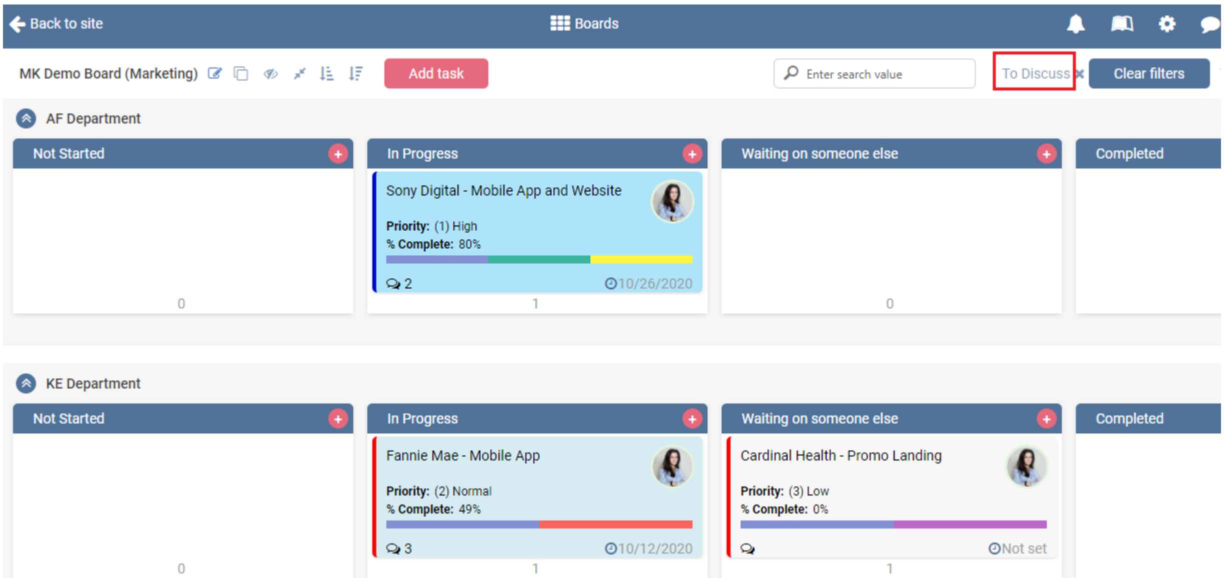
Define the filter parameters according to your needs.



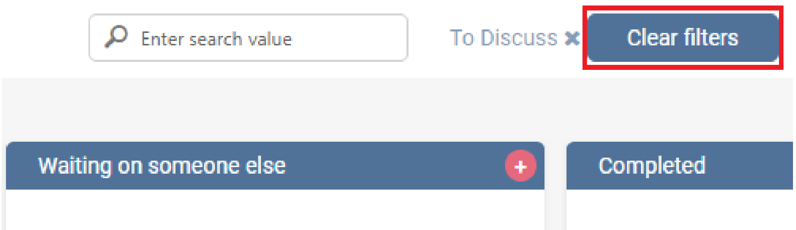
In the example below, tasks with "Needs Discussion" label are selected for the "To Discuss" filter.



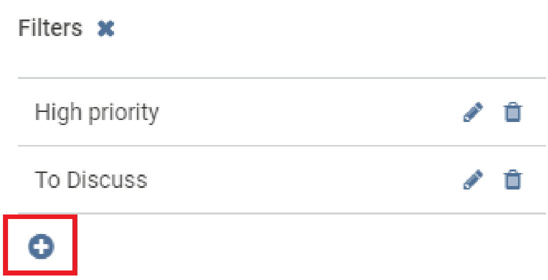
Now you can use this filter to see the tasks that need to be discussed with your team.



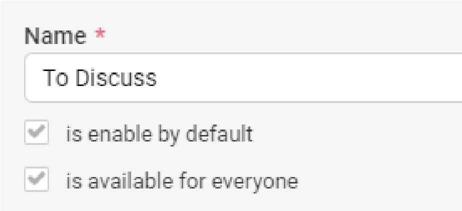
Use “Clear filters” button to clear the filters you’ve applied.



Add more filters with “+” button.

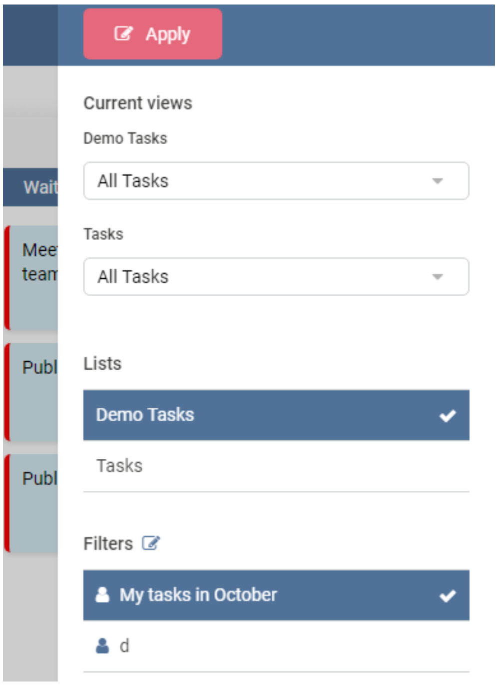


It is possible to enable this new filter by default. If you select “is available for everyone” checkbox, the filter will be visible for all users. If you do not enable this option, the filter will be saved as a personal filter and will be available only for its creator.

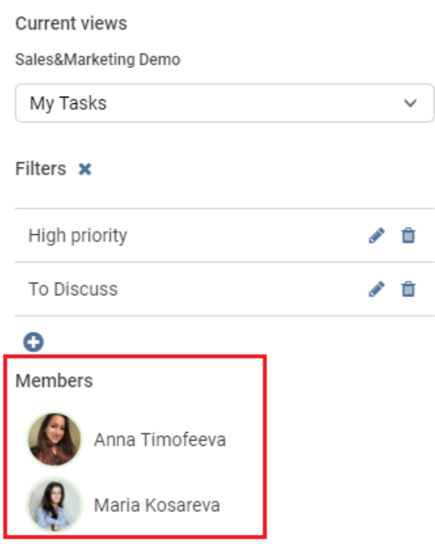


If you have multiple lists on the board, you can also use the lists filter. This filter allows you to sort tasks by the list they belong to and by other conditions as well.

In the following example, the tasks are sorted by 2 filters: My tasks with duration time in October from the "Demo Tasks" list.



You can filter tasks by the board members. You can click on a user to see the tasks assigned to him.

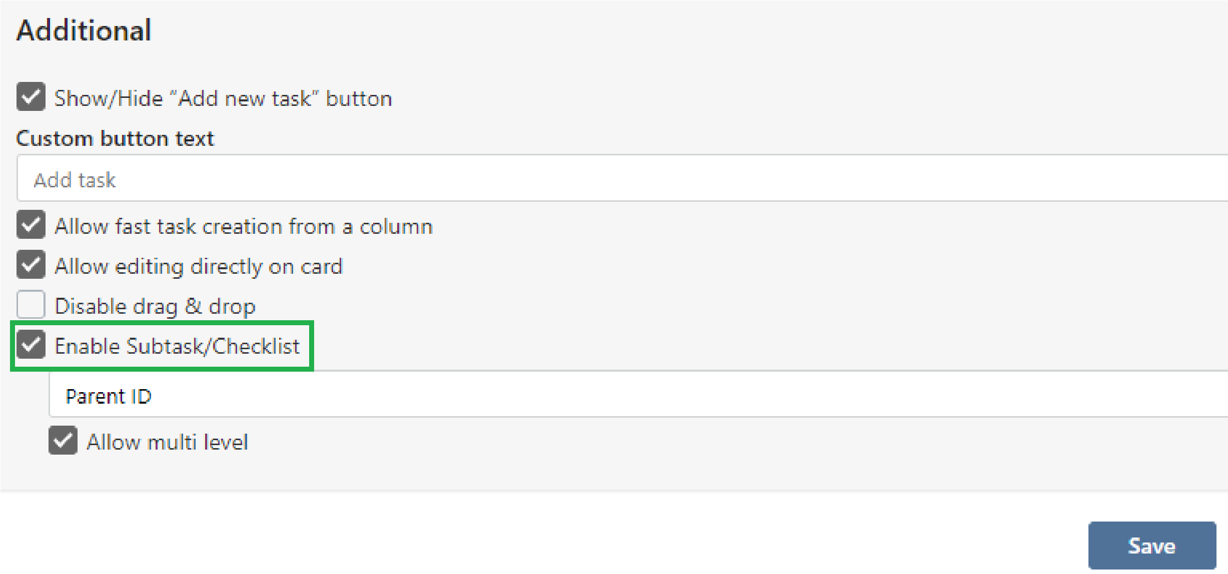


Note: The filters selected from the menu use "AND condition". Filters by a user use "OR condition".

Subtasks

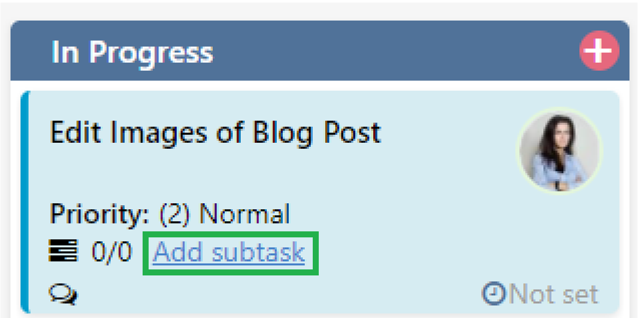
You can use subtasks to split tasks and work on them step by step.

Go to the "**Advanced Setup**" and choose "Enable subtask/checklist" to start using subtasks.

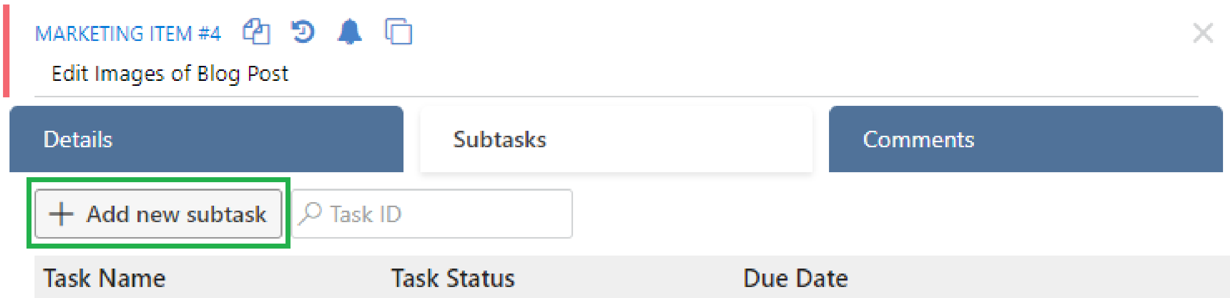


Note*: if you check the box "Allow multilevel", you can create subtasks for subtasks.*

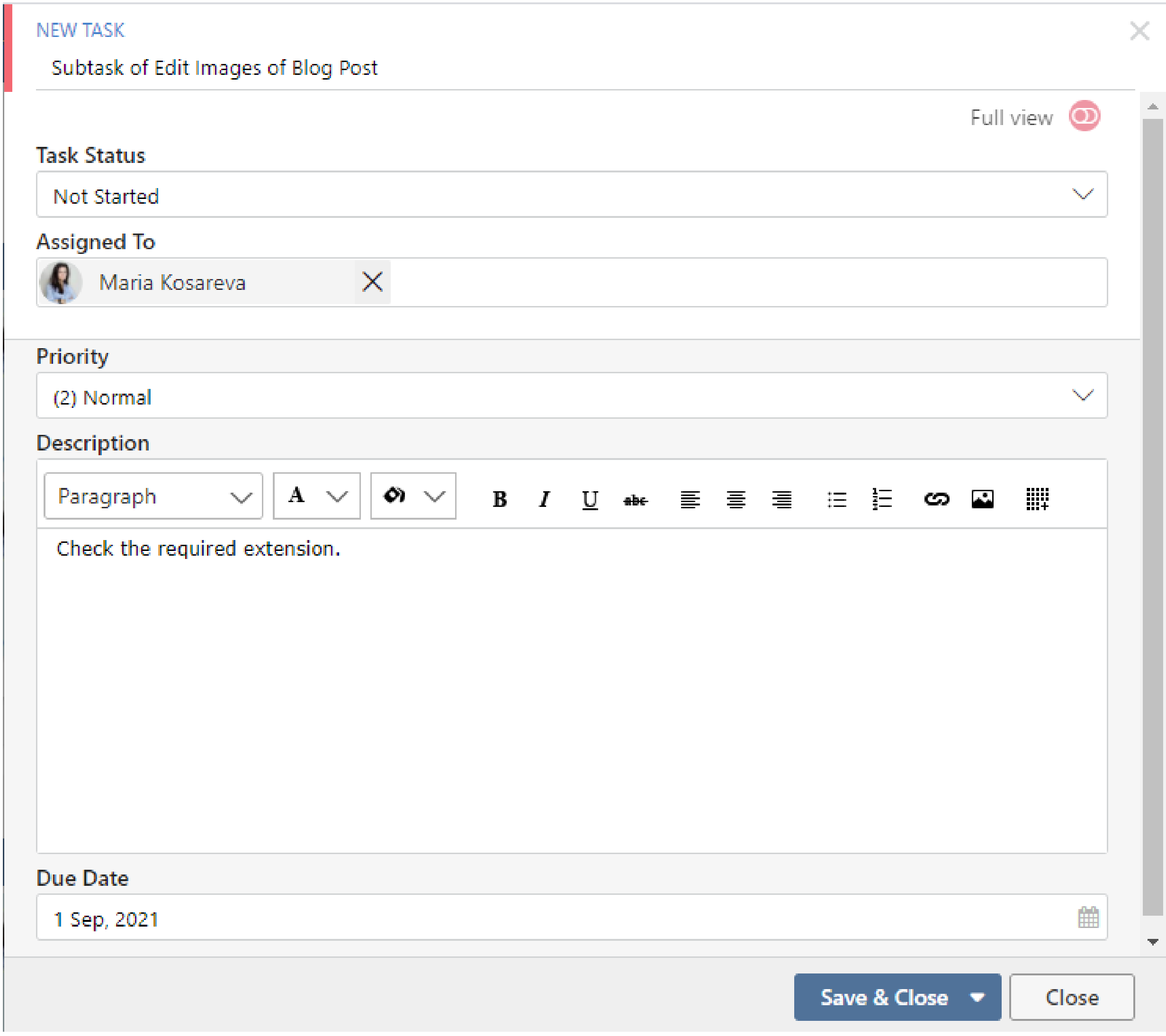
Now the "**Add subtask**" button appears on cards. Click if you need to add a subtask to this task.



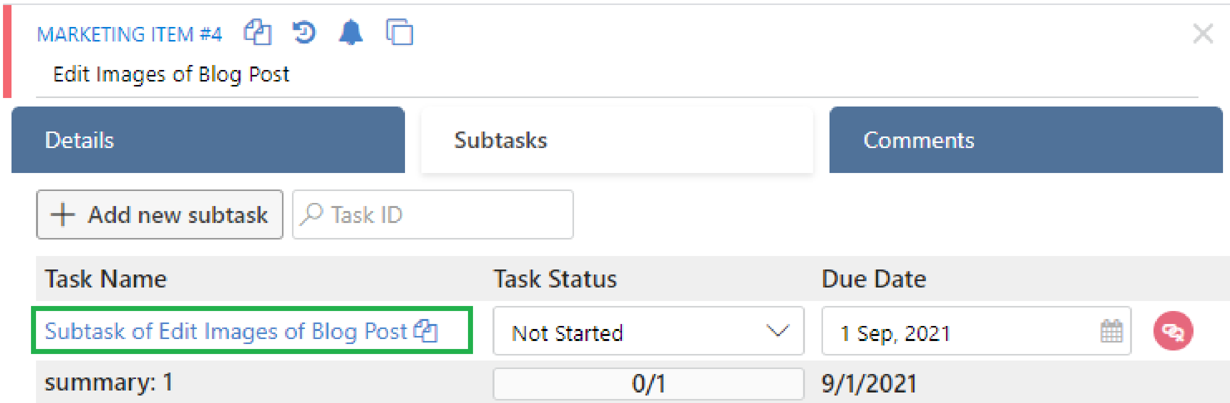
Now use the "**Add new subtask**" button.



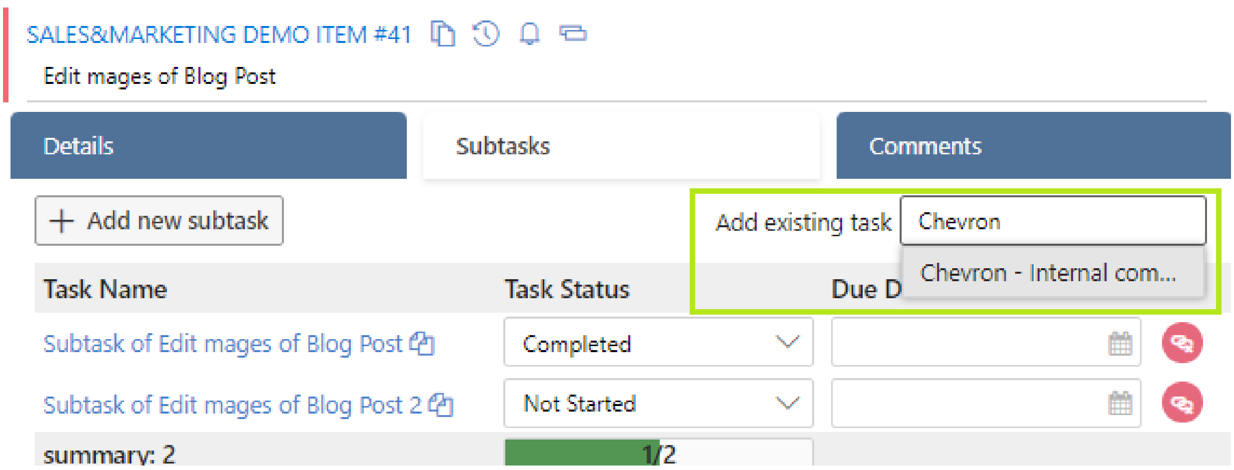
Now fill in the form and save the subtask.



The subtask appears in the list of subtasks.



Also, you can choose an existing task to be a subtask instead of creating a new one. In this case, type the task id or start typing the title to find it.



Parent ID Field

The **parent ID field** is used by default by task lists. But you can change this and use any other lookup field as a parent ID field. This may be useful if you need to group or categorize your tasks in your special way.

We use the parent ID field for quick boards because the board is made for a task list. This provides the maximum compatibility with such tools as MS Project, Gantt and etc.

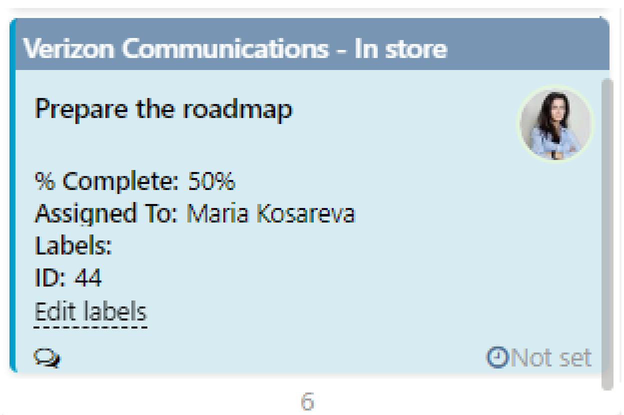
Note*: starting from 5.2.2 version you can also use external lookup for parent ID field.*

If your board is created from a custom SharePoint list, it may not contain the Parent ID field (as it is usually done by default for task list functionality). To use the subtask mode in this case, you should add at least one lookup field to it for proper work of parent-child task relations.

When you're creating a quick board, the source task list is created automatically. It already contains the Parent ID lookup field required for using the subtask mode.

View Subtasks on the Kanban Board

On the Kanban board, subtasks have also the name of their parent task (with blue background). For example, below you can see the task "Prepare the roadmap" which is a subtask of "Verizon Communications – In store".

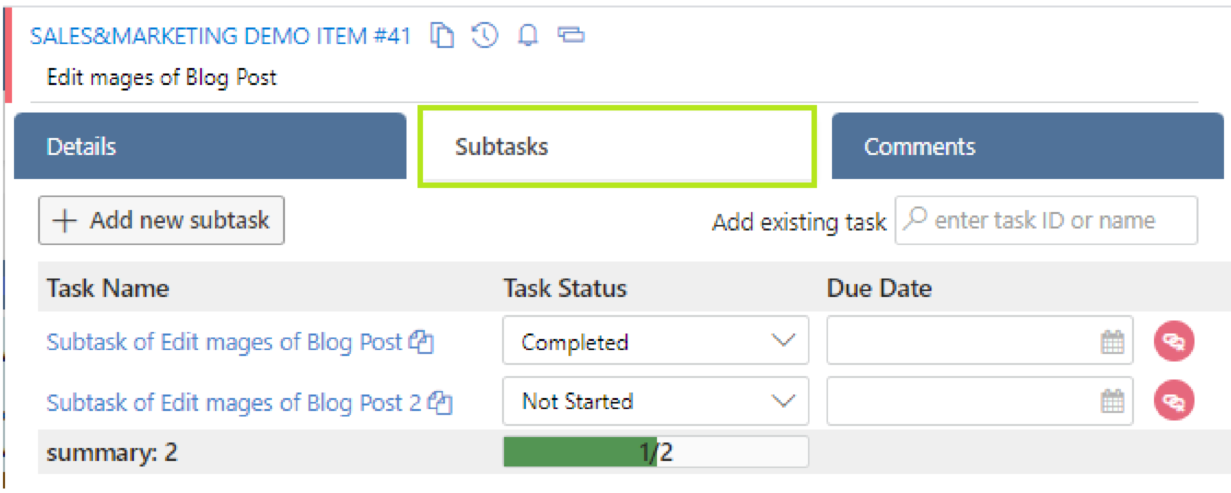


Subtask Counter

You can track how many subtasks the parent task has with help of the subtask counter. It also appears on a card when you enable the subtasks for the board. In this case, 1/2 means that the parent task has two subtasks, and one of them is in the "Completed" status.

Edit Subtasks in a Subtasks tab

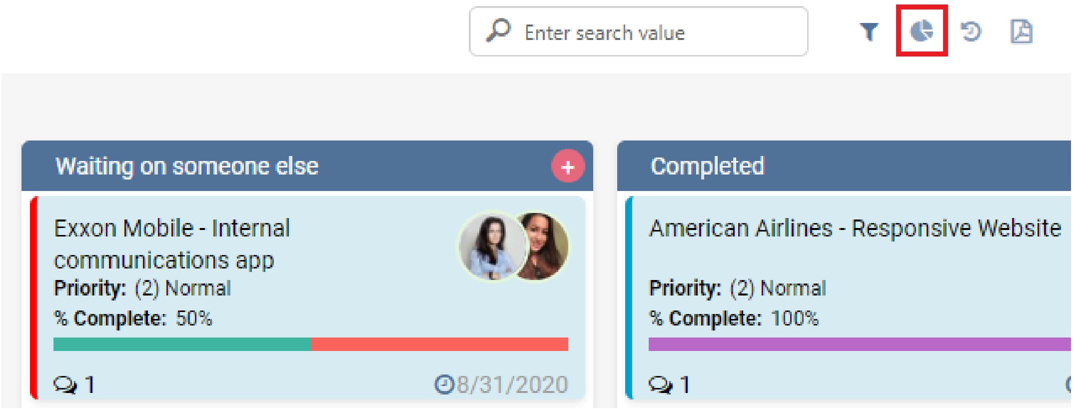
You can edit subtasks directly in the card of its parent task. Just switch to the "Subtasks" tab, make the required changes and save them.



Using subtasks is a special feature for the cases when tasks need to be split into steps.

Charts

Virto Kanban Board App supports making reports for your boards in a charts view. Click "Charts" icon in the right upper corner to open a chart view.

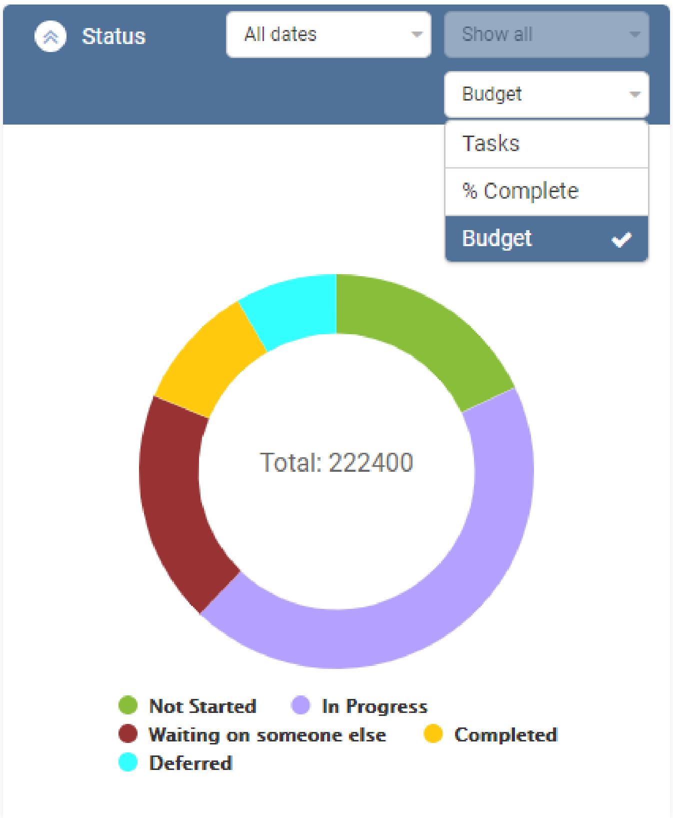


There you can see the tasks statistics displayed in four graphs — “Status”, “Members”, “Completion” and “Burndown”.

Define the required parameters for your analysis.

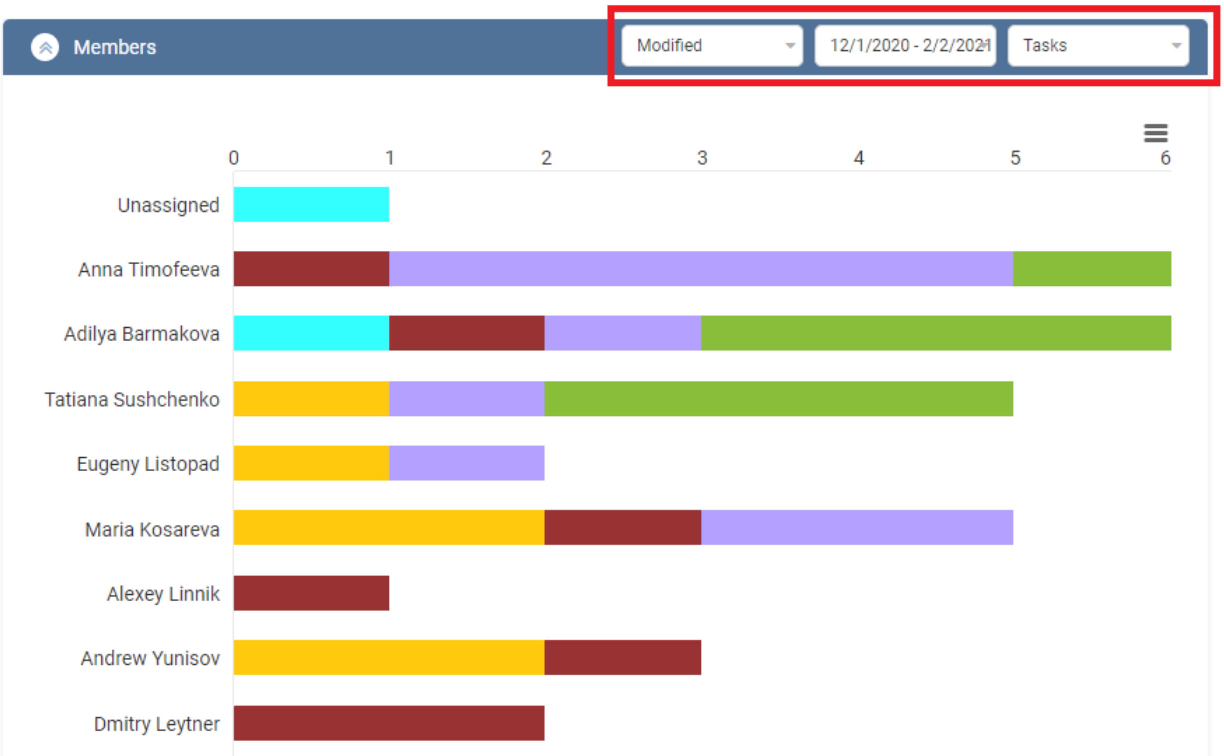
1) **Status**

Here you can choose in the dropdown the field you need, for example, Due date, the period to analyze, and the unit – number of tasks, percent, or budget. You can always save this chart as an image.



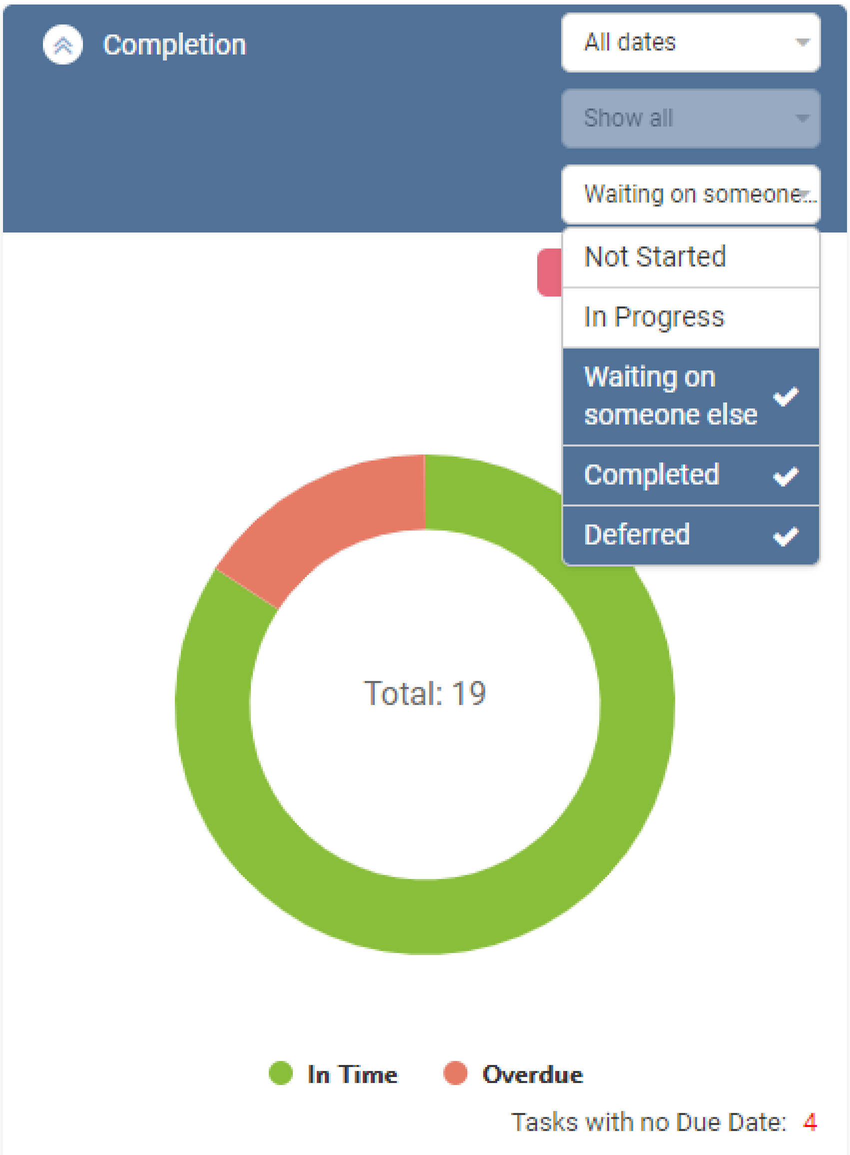
2) Members

The same idea works with the second chart – Members. For example, see the board members who modified the tasks during the last month.



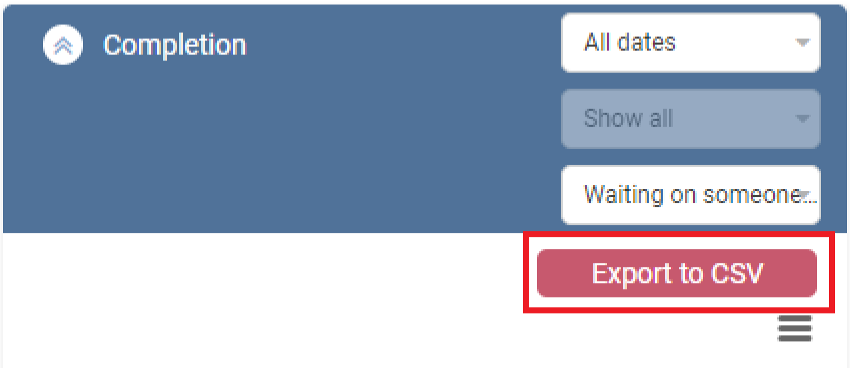
3) Completion

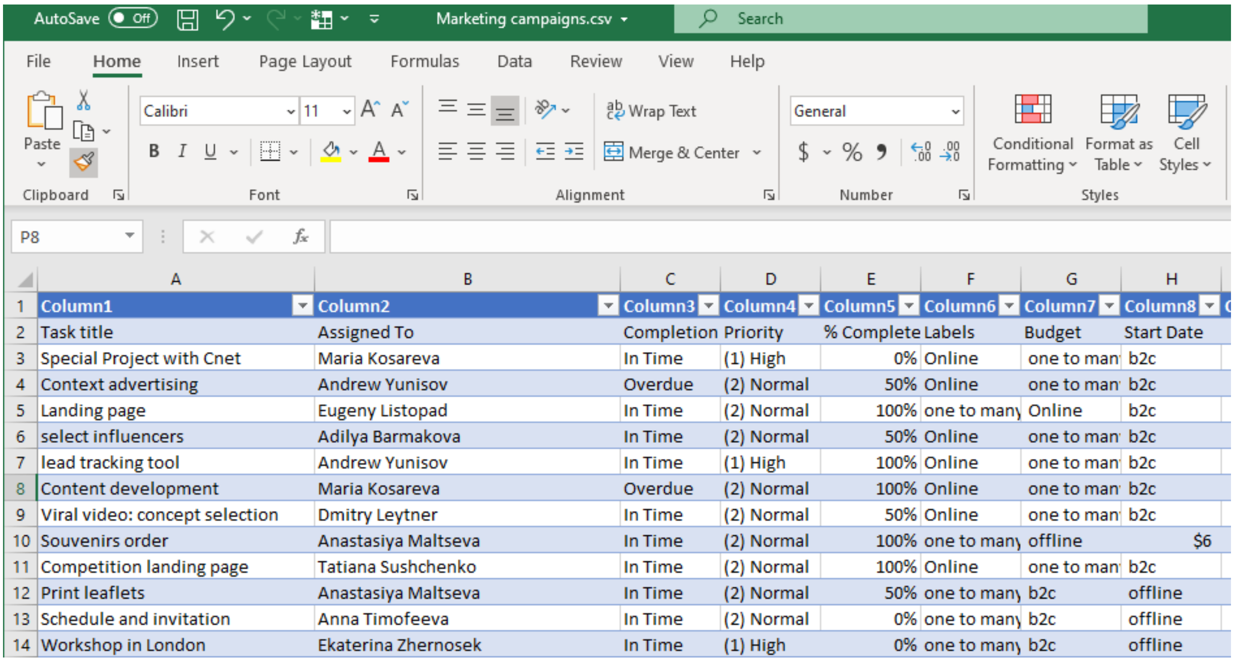
Use the “Completion” chart to see the tasks completed in-time and overdue. Since the data displayed in the chart comes from the SharePoint source list, the completed tasks may also be in other columns, such as “Deferred” or “Need someone else”. You can add them to your report as well.



***Note**: the “Completion” chart shows only the tasks with a due date set. If a task has no due date, it does not appear here on this chart (see the marker under the chart).*

To see the completion report in detail, you can export the chart to a CSV file. In this format, you can sort the tasks and for instance, see the team members responsible for the overdue tasks.

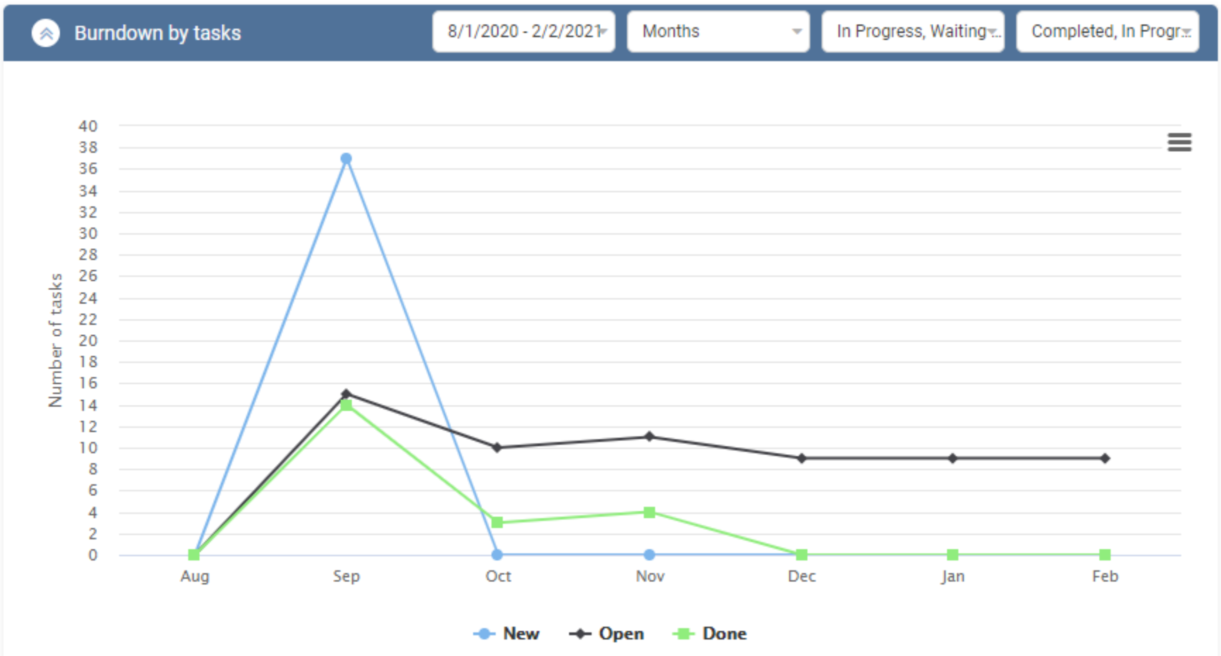




Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8
Task title	Assigned To	Completion	Priority	% Complete	Labels	Budget	Start Date
Special Project with Cnet	Maria Kosareva	In Time	(1) High	0%	Online	one to man	b2c
Context advertising	Andrew Yunisov	Overdue	(2) Normal	50%	Online	one to man	b2c
Landing page	Eugeny Listopad	In Time	(2) Normal	100%	one to many	Online	b2c
select influencers	Adilya Barmakova	In Time	(2) Normal	50%	Online	one to man	b2c
lead tracking tool	Andrew Yunisov	In Time	(1) High	100%	Online	one to man	b2c
Content development	Maria Kosareva	Overdue	(2) Normal	100%	Online	one to man	b2c
Viral video: concept selection	Dmitry Leytner	In Time	(2) Normal	50%	Online	one to man	b2c
Souvenirs order	Anastasiya Maltseva	In Time	(2) Normal	100%	one to many	offline	$6
Competition landing page	Tatiana Sushchenko	In Time	(2) Normal	100%	Online	one to man	b2c
Print leaflets	Anastasiya Maltseva	In Time	(2) Normal	50%	one to many	b2c	offline
Schedule and invitation	Anna Timofeeva	In Time	(2) Normal	0%	one to many	b2c	offline
Workshop in London	Ekaterina Zhernosek	In Time	(1) High	0%	one to many	b2c	offline

4) Burndown

You can also use burndown chart to represent the work left. The graph is formed automatically by the board tasks left. Just choose the period and start to analyze the efficiency.



Turn Off the Charts

You can turn off some of the reports. For instance, **you do not need all of them to show**. Open the board settings and find "Charts" in the "Advanced setup" tab.

Uncheck the charts you wish to hide from the dashboard. Please, remember to save the changes at the bottom of the settings page.

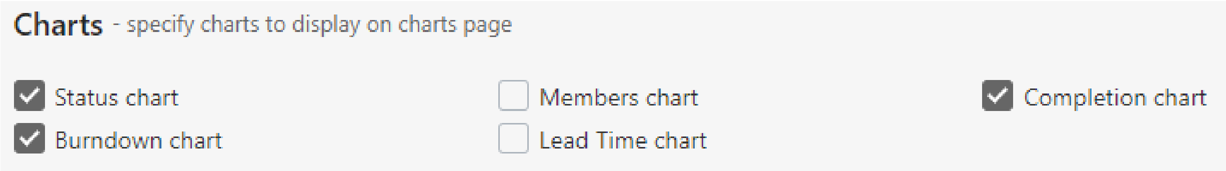
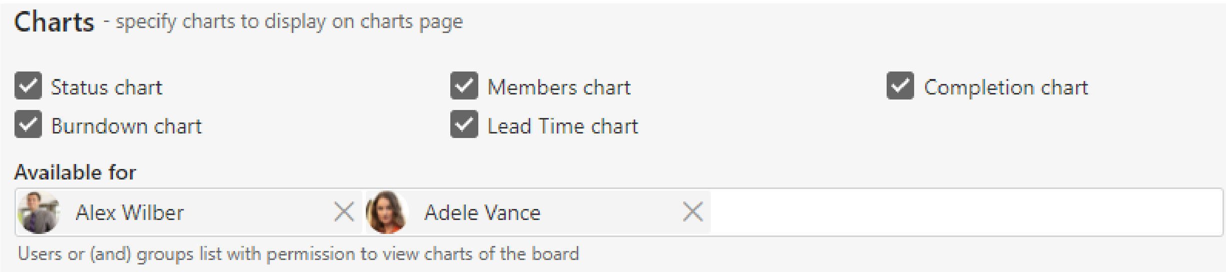


Chart Permissions

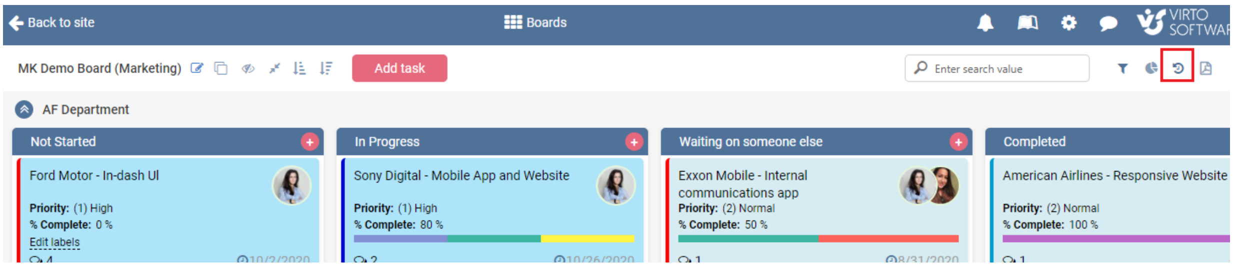
You also can **set the permissions of the charts** and choose users to view the board. This option is useful when you have financial or any other information which should not be available for all the board members. Find the user you wish to choose and add him/her to view the charts of this board. Also, save the settings.

Note*: it is also possible to choose groups.*



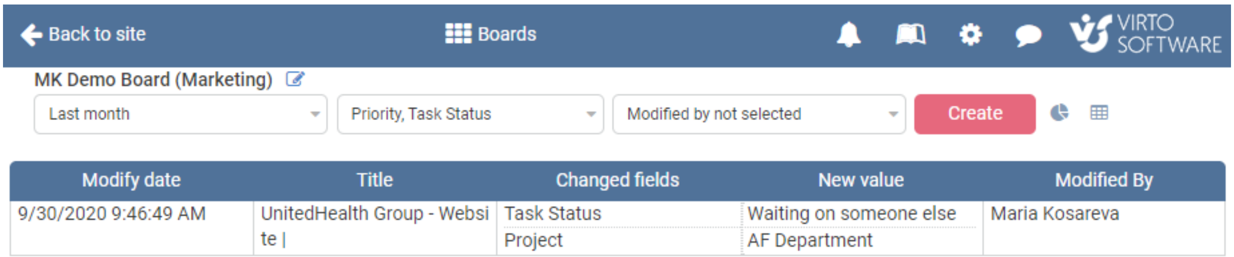
Board History

The board history icon is available in the right upper corner. This feature allows you to track the tasks history to see all changes on current board.



Note*: the Item Version History option must be enabled in list versioning settings.*

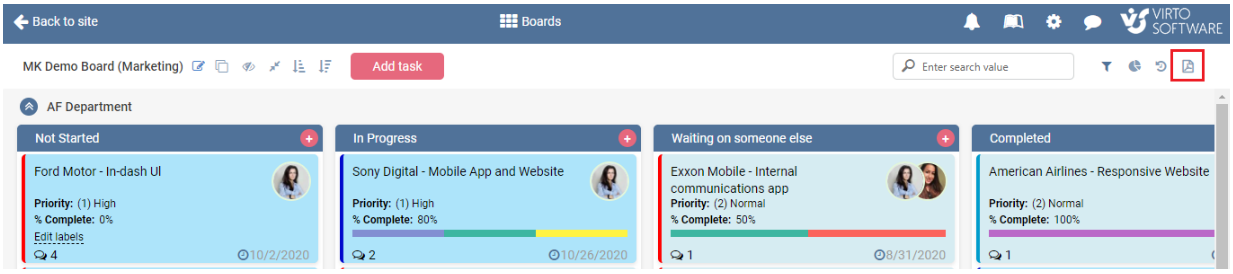
Here you can select filters to view specified changes. All the changes will be displayed.

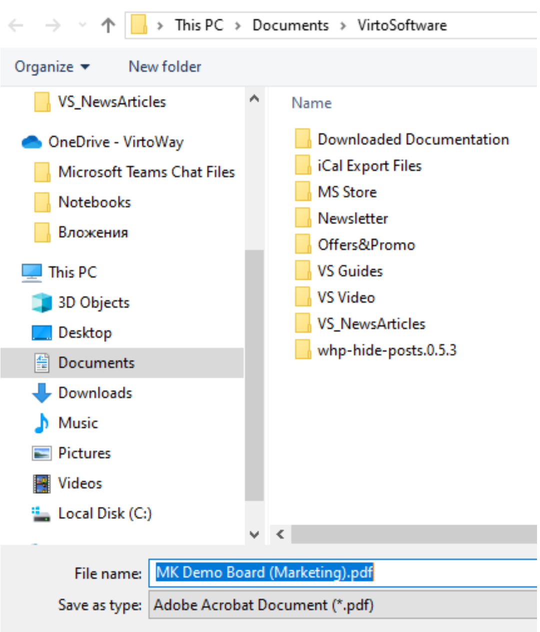


Note: *any changes of attachments and pictures are not displayed in both task and board history.*

Save to PDF

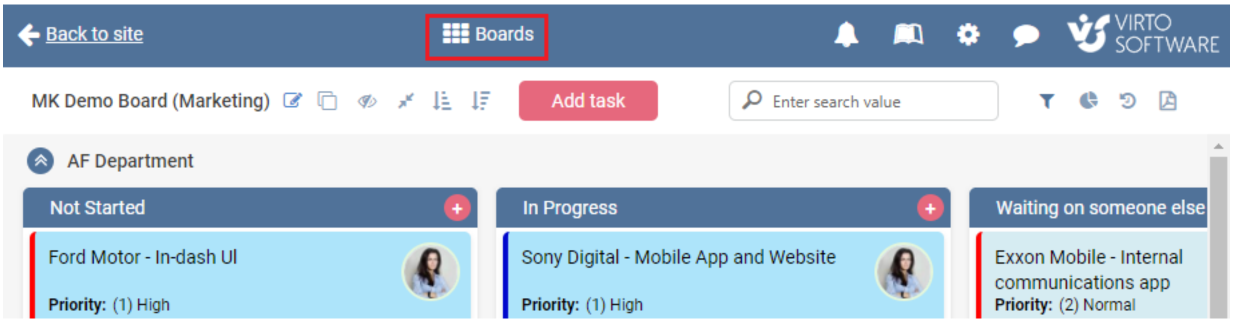
You can save your board to PDF. Click an icon in the left upper corner to save your board and choose the required format. Now you can share this file or print it for any purpose.



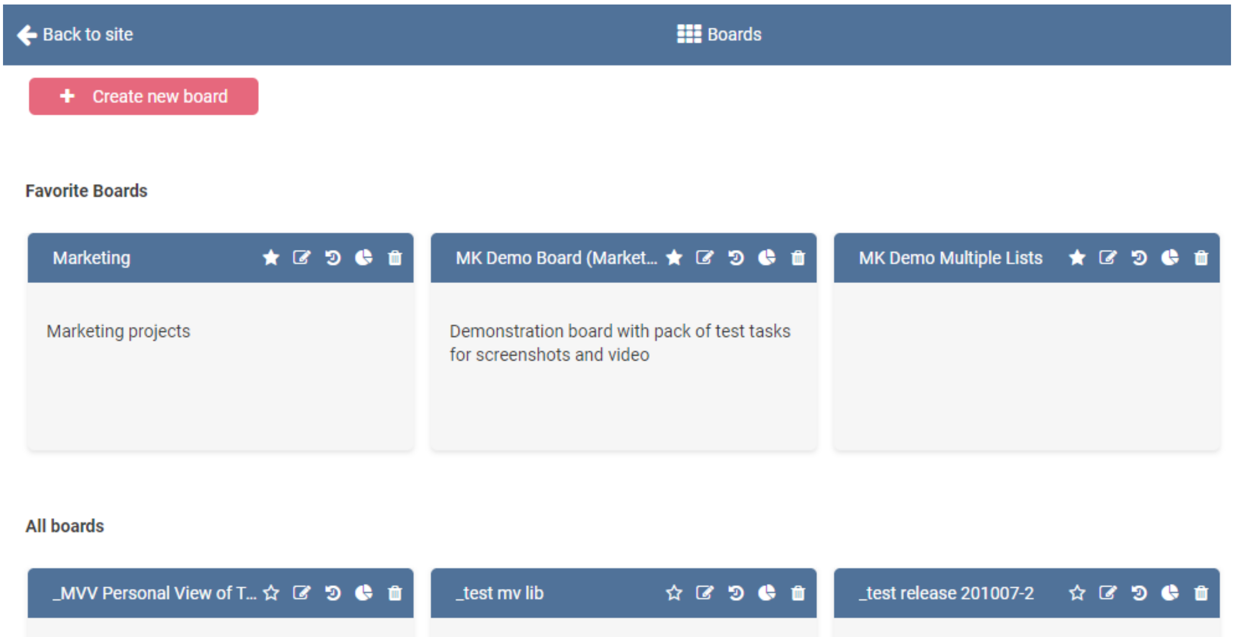


Managing your Kanban Boards

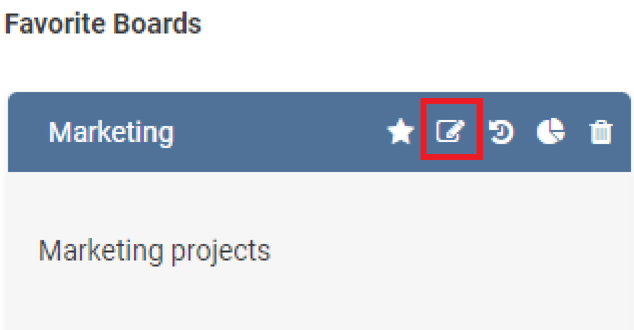
Click “Boards” in the left upper corner to view all created Kanban boards.



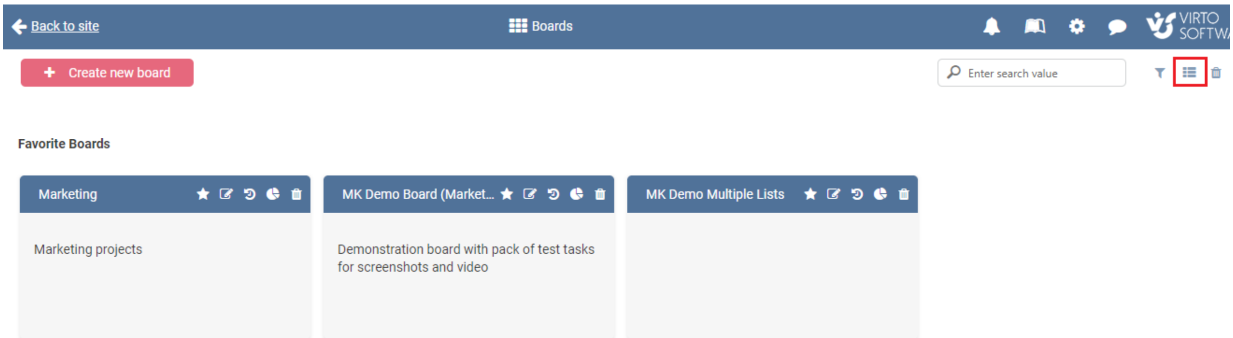
Add more boards, remove the ones you do not need any more or mark your mostly used boards with a star.



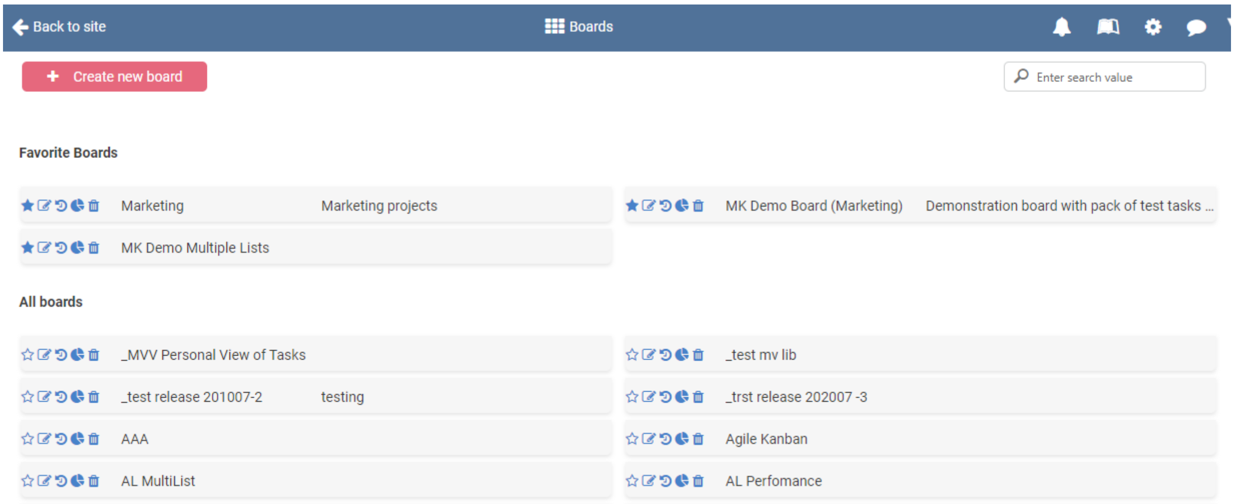
You can edit board settings from this view or go to setting right from the board view by clicking on edit icon on the right side of the board name.



You can also view the boards as a list. Click an icon in the right upper corner.



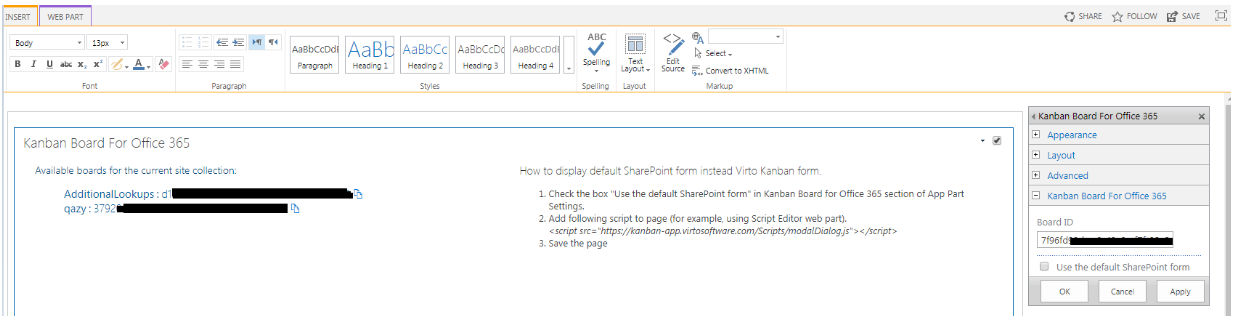
Now the boards are shown in the list view as follows.



Working with Virto Office 365 Kanban Board as an App Part

Choose specific Kanban board for a site page

You can add unique Kanban board to each site page, where Virto Kanban is added as app part. Go to “Site Settings” and edit Kanban app part.



Below the default Kanban name are displayed IDs of all available Kanbans on this SharePoint farm. Copy ID of required Kanban, which you will display as default Kanban on current site page. Paste this ID to app part properties field “Board ID”. Now this Kanban will be shown as specific

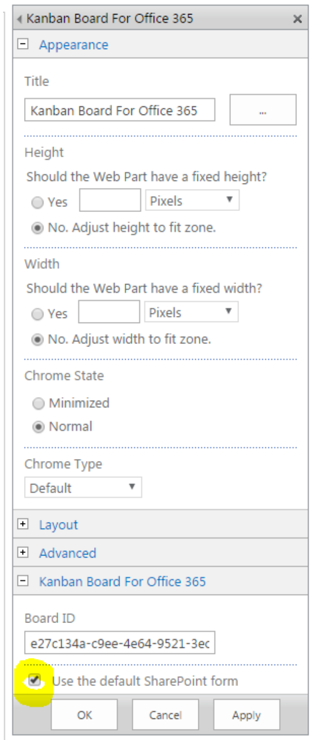
Kanban board for current page.

How to Display Default SharePoint Form instead Virto Kanban form

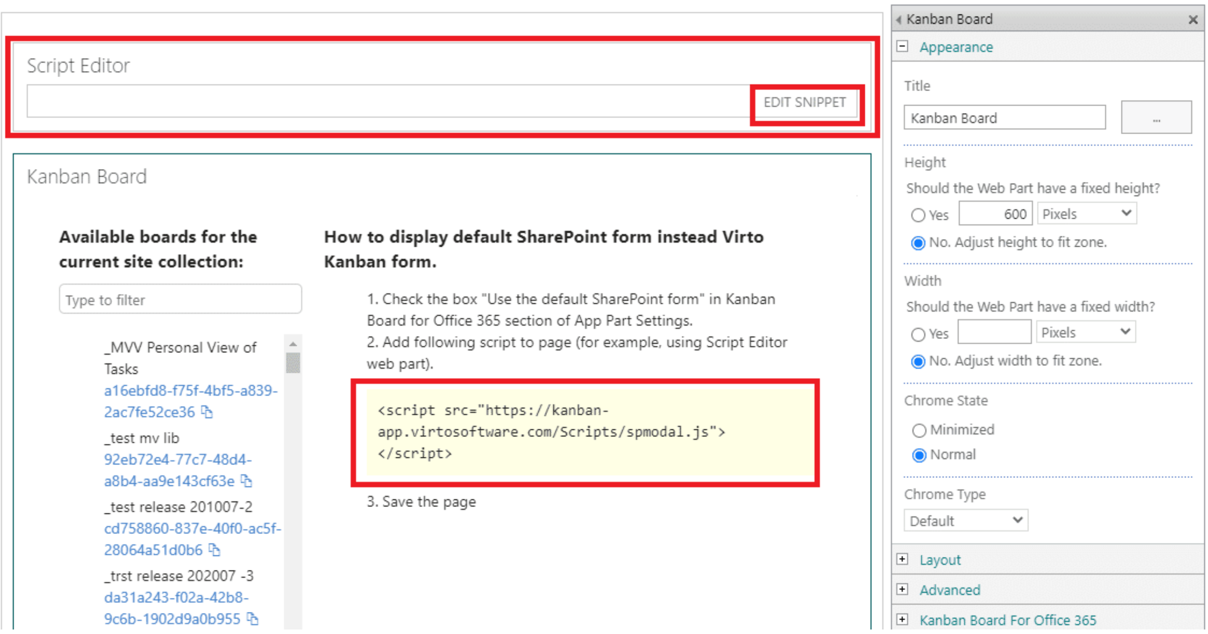
In case you're using the Virto Kanban as a web part, you should use the script as follows for correct work.

Go to the SharePoint site page where the Kanban Board as a web part is added and switch to the edit mode.

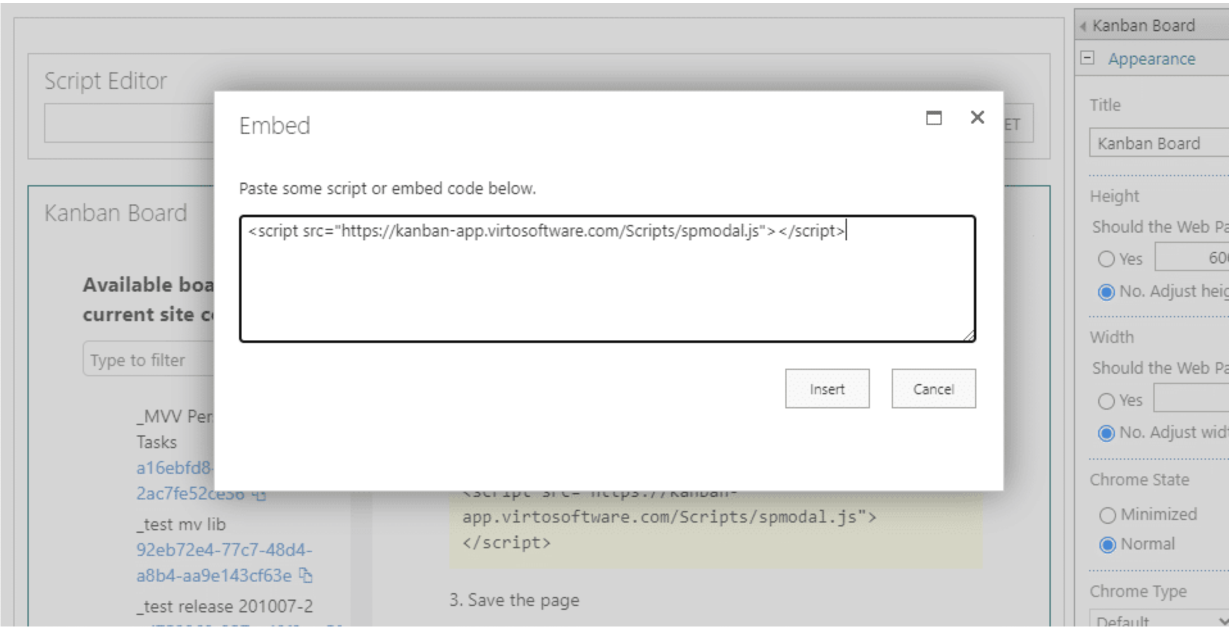
Check the box "Use the default SharePoint form" in Kanban Board for Office 365 section of App Part Settings.



Copy the script and check the box "**Use default SharePoint form**" in the Kanban Board app settings.



Insert the copied script to the Script editor added to the page and save the changes. Start using!



Using Virto Kanban Board on Modern SharePoint site

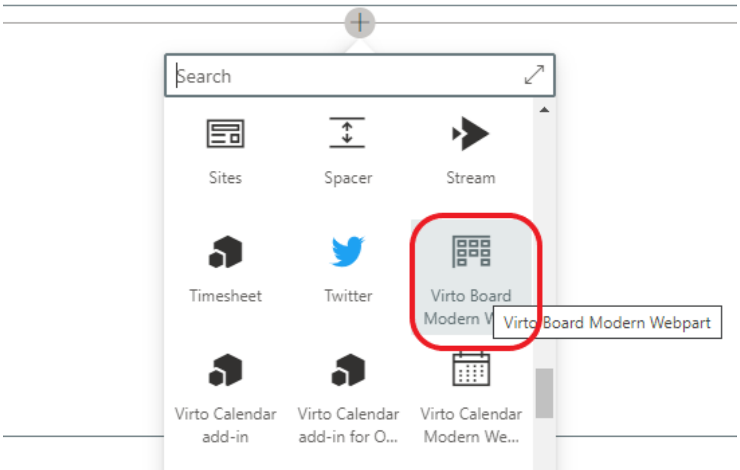
Virto Kanban Board online supports the modern SharePoint interface. You can use the Kanban online application on the **SharePoint modern sites** as well. In other words, the users of modern sites have a great opportunity of working with full Virto Kanban functionality.

To start using please follow the steps below.

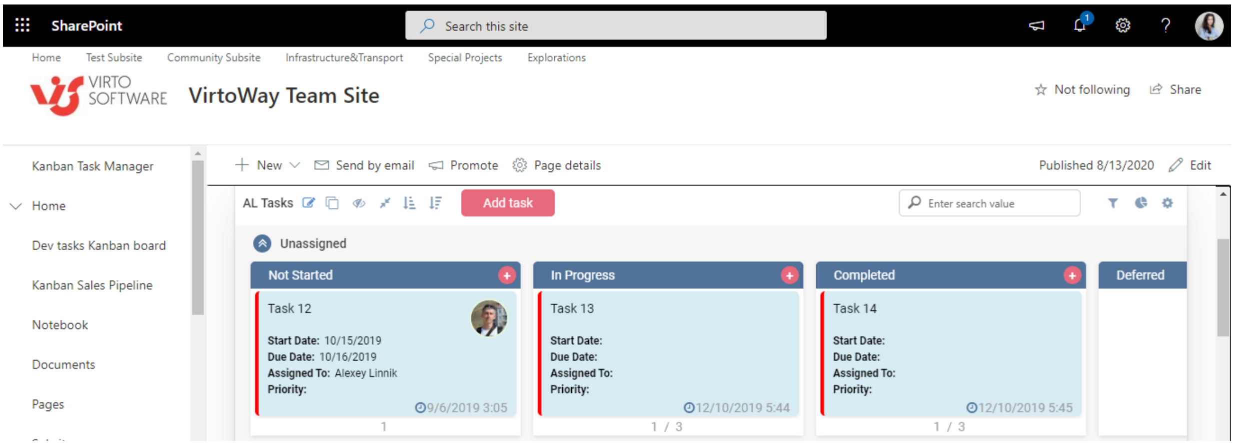
Step 1. Install the Kanban Board app to the SharePoint site or make sure it's already installed.

Step 2. [Download the Kanban Board Modern web part](#) and add it to the app catalog.

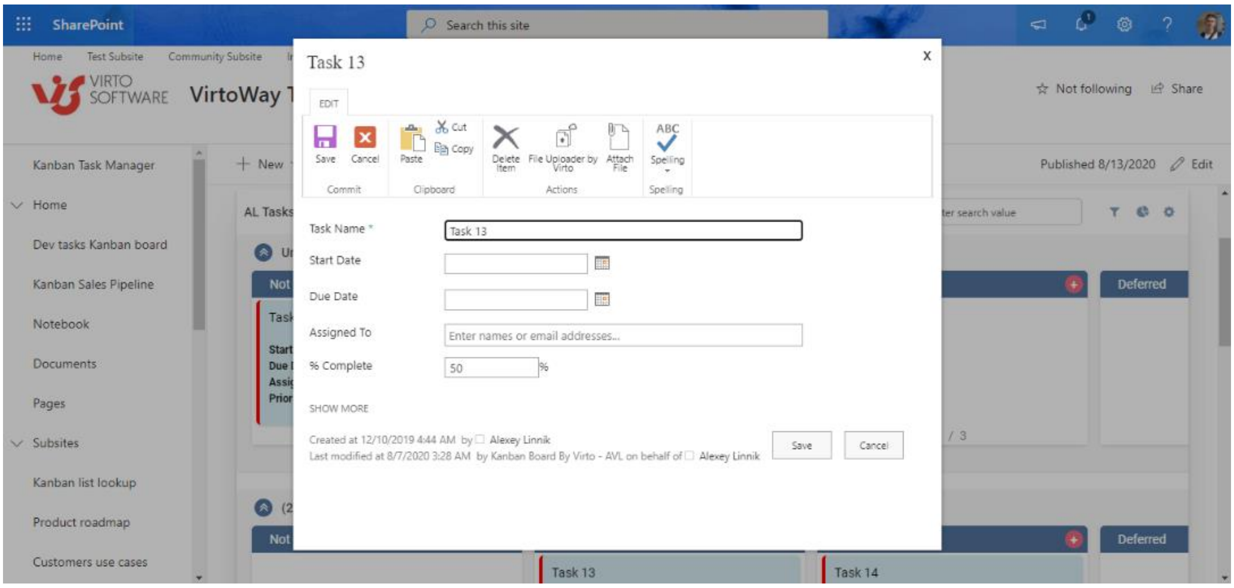
Step 3. And finally, add the "Virto Board Modern Web Part" to your SharePoint site page.



The Virto Kanban Board on your modern site looks as follows.



Or how the SharePoint form looks in the Virto Board Modern app.



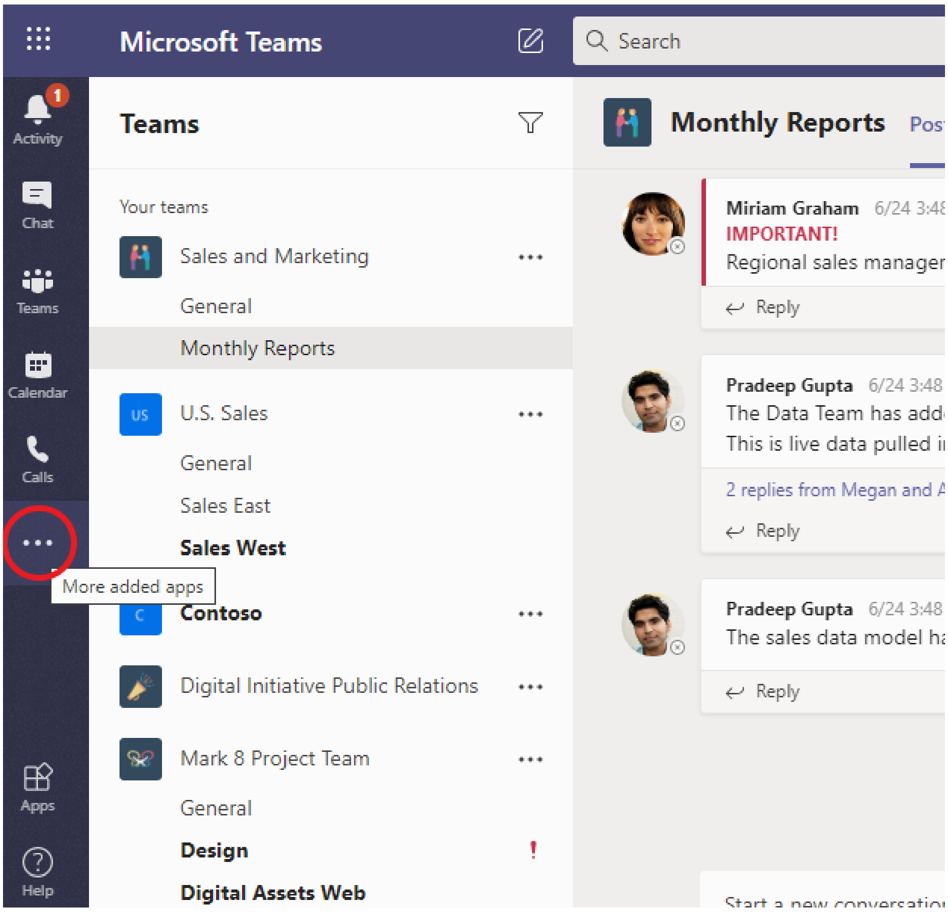
Working with Virto Office 365 Kanban Board in Microsoft Teams

If you have a customized Virto Kanban board in your SharePoint, you can add it to Teams as a separate tab. This way you will not need to switch between the applications to manage your and your team's tasks.

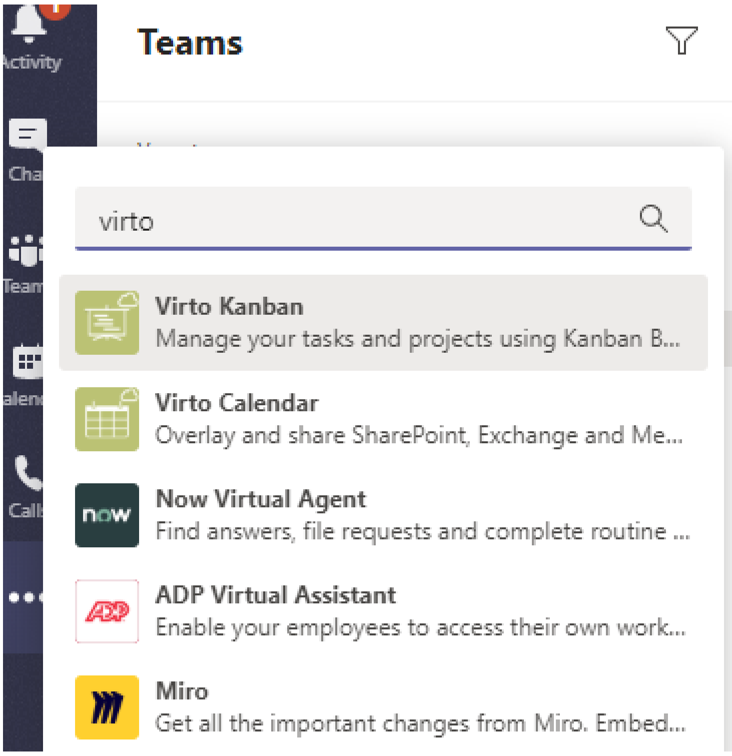
You can create and manage tasks as usual in Teams and set up board settings in SharePoint. The Kanban board customization is available in SharePoint environment only. In Teams, you can display and manage board's tasks without access to Kanban Settings.

The Kanban boards on Teams inherit user permissions from SharePoint and are invisible for external users in Teams. If a user doesn't have access to a board in Teams, a pop-up window with "Access denied" message will appear.

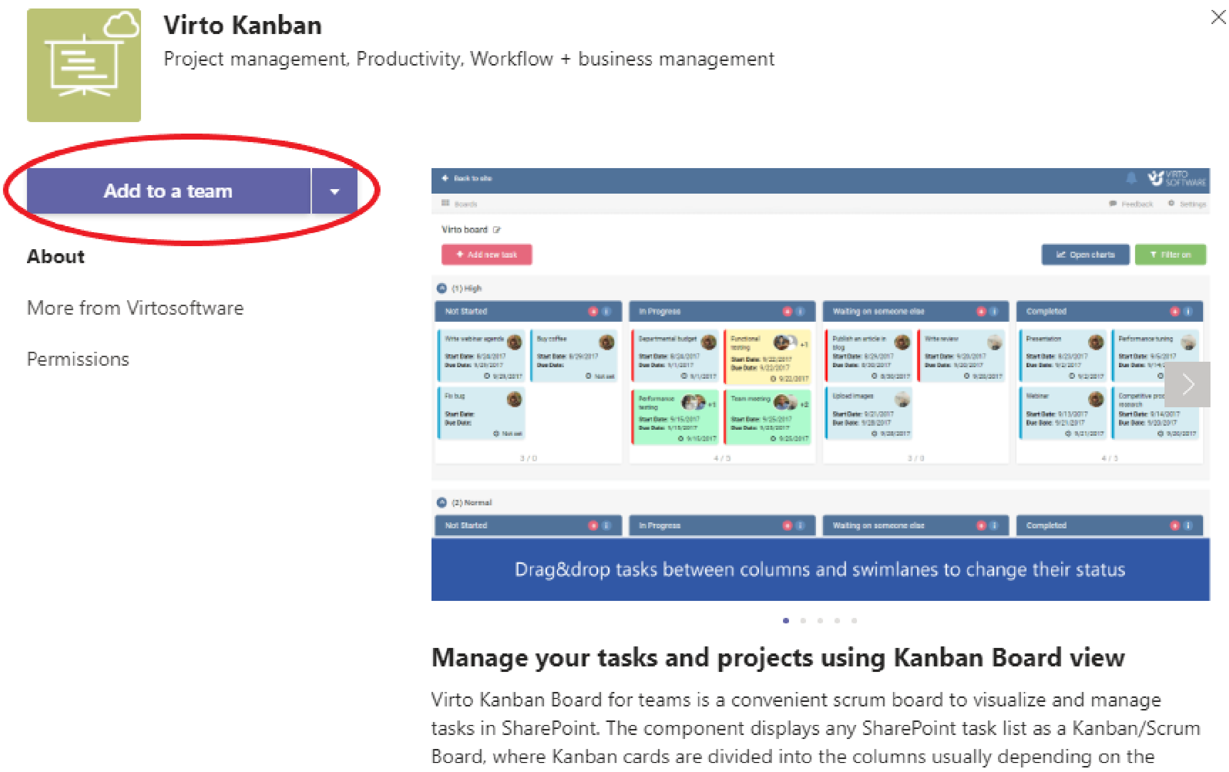
Click dots on the left menu of your MS Teams.



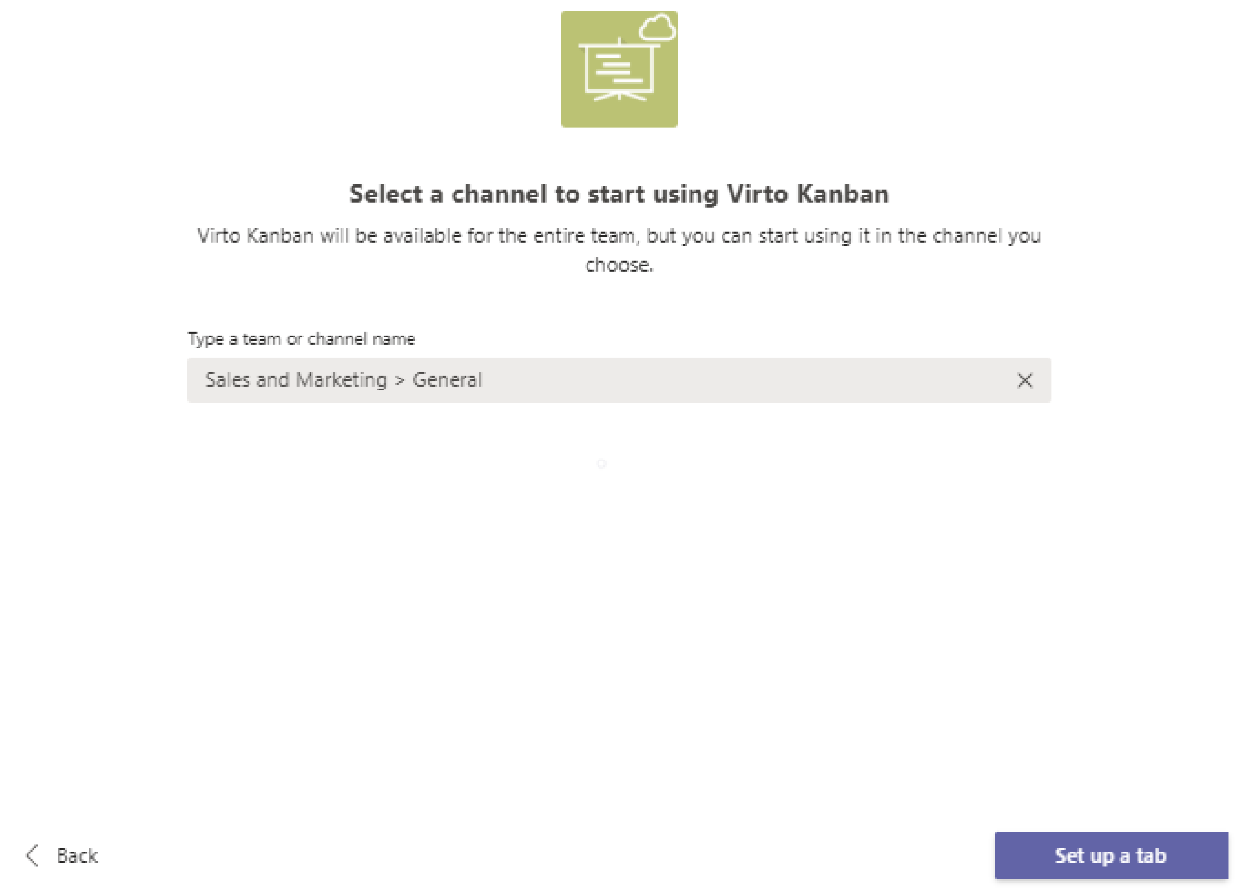
Find Virto Kanban app.



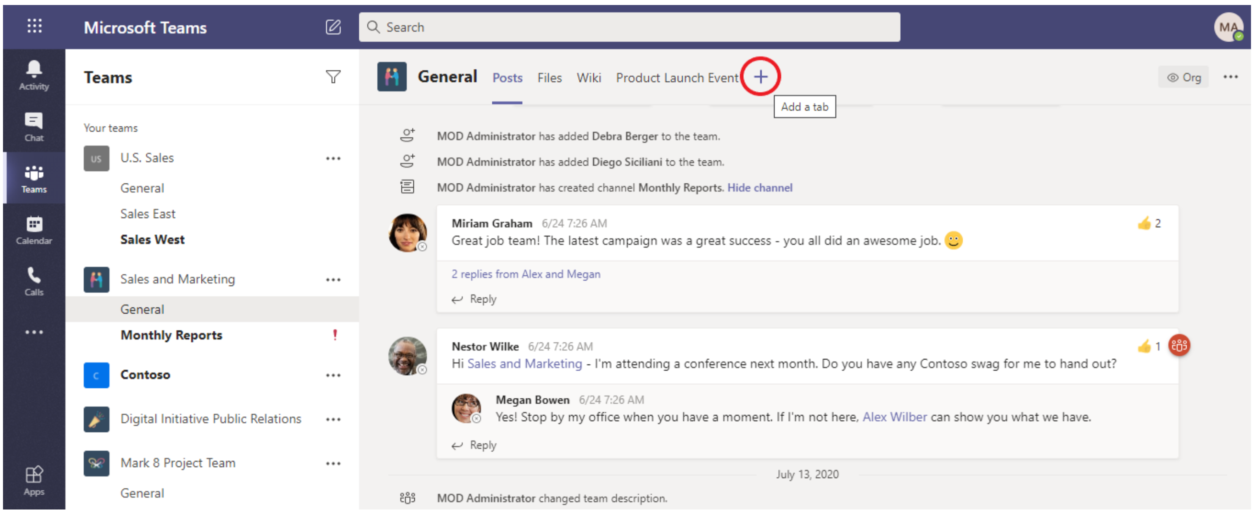
As Virto Kanban Board overview appears, click "Add to a Team".



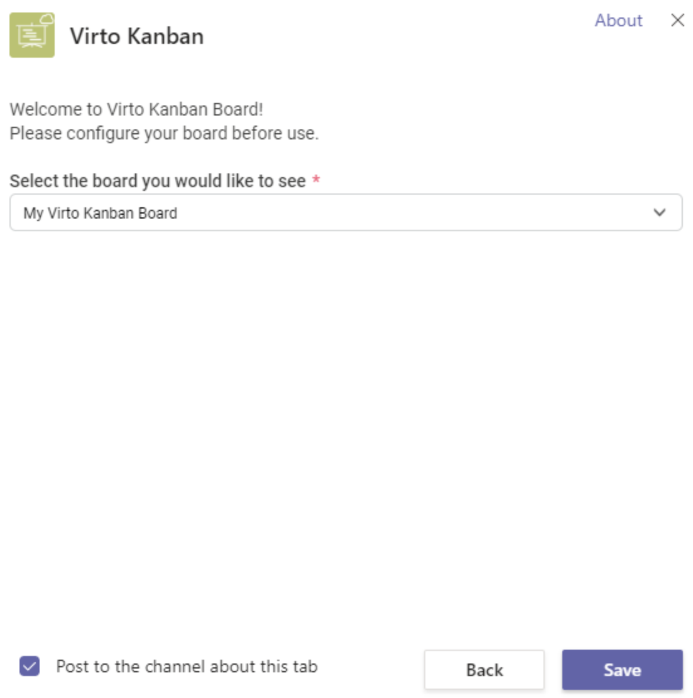
Select any of your Teams channels that you are going to add the Kanban board for. Click "Set up a tab".



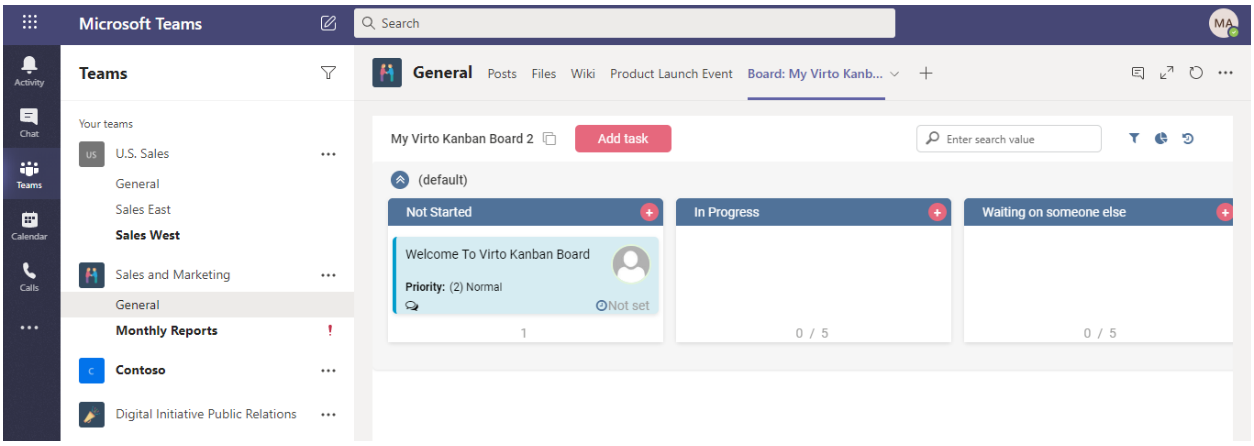
Open the channel where you’ve decided to add the created Kanban board, and click “Add a tab”.



Select the board to add.

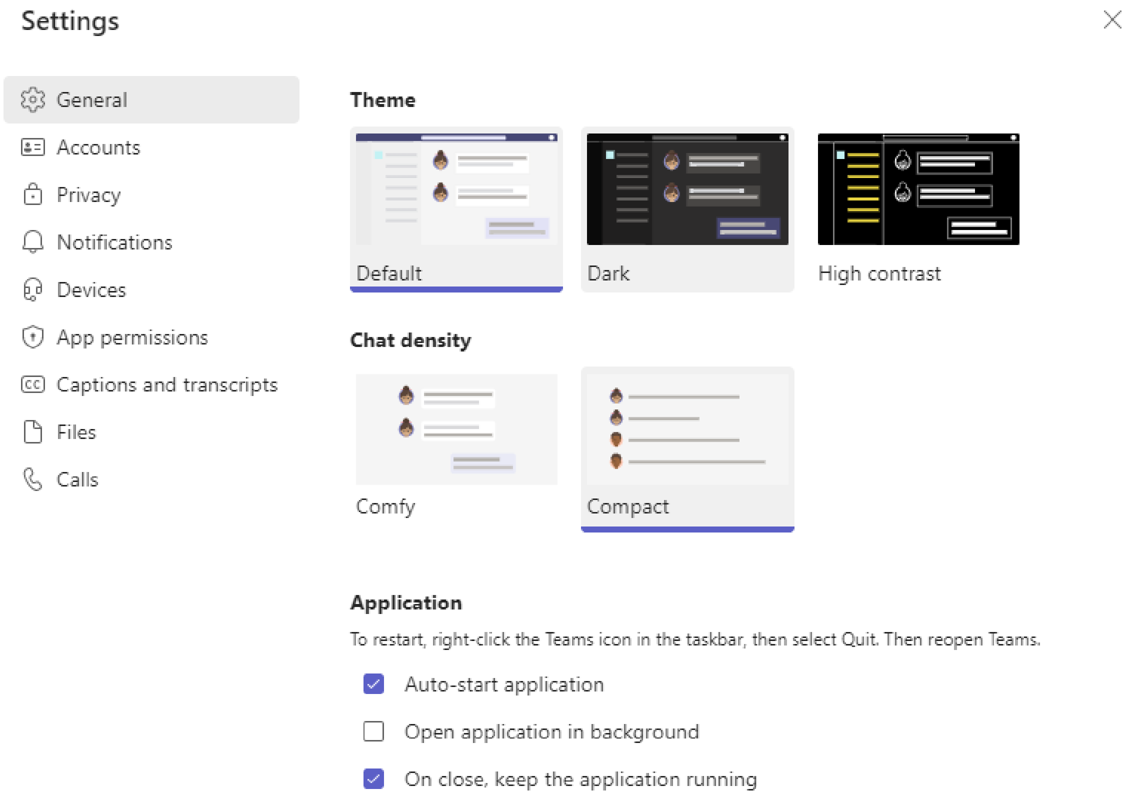


Now the board is added to your Teams channel in a separate tab. Start using it right from your Teams – create and manage tasks with Virto Kanban Board without switching to SharePoint.

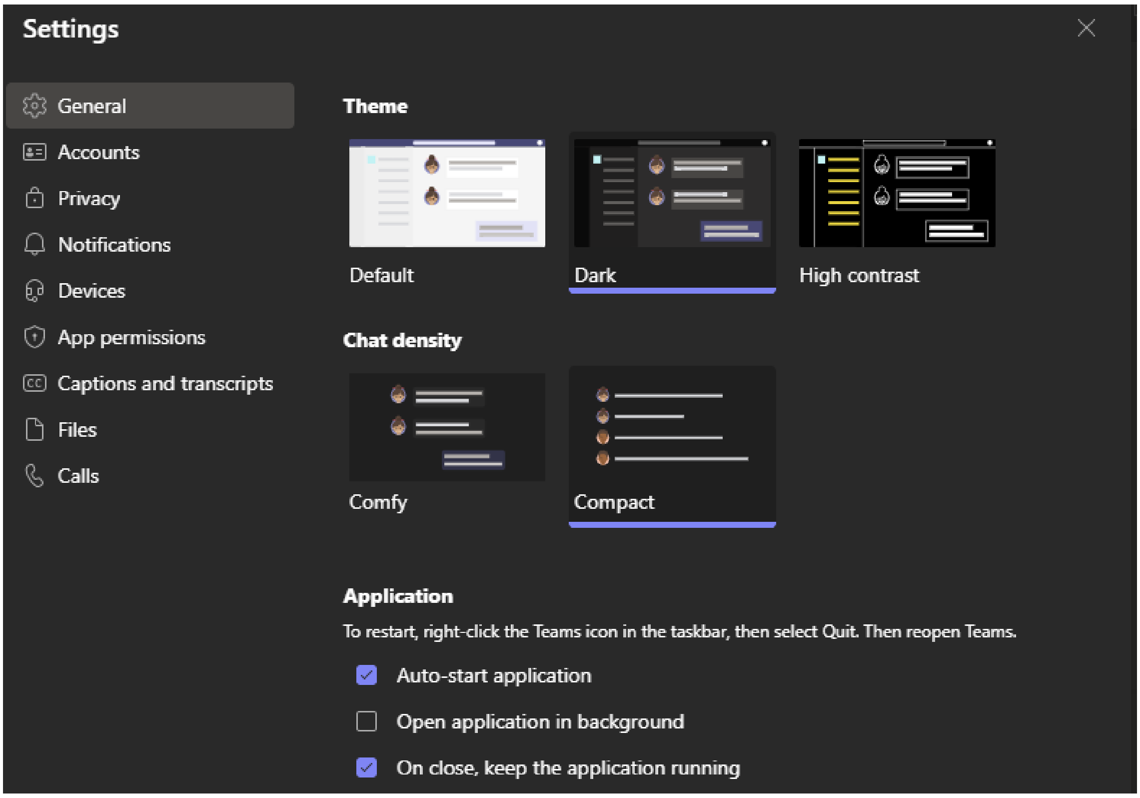


Dark Theme Mode (Coming soon)

Open Teams settings (right-click on the Teams icon in the tray) and turn on the dark theme mode.

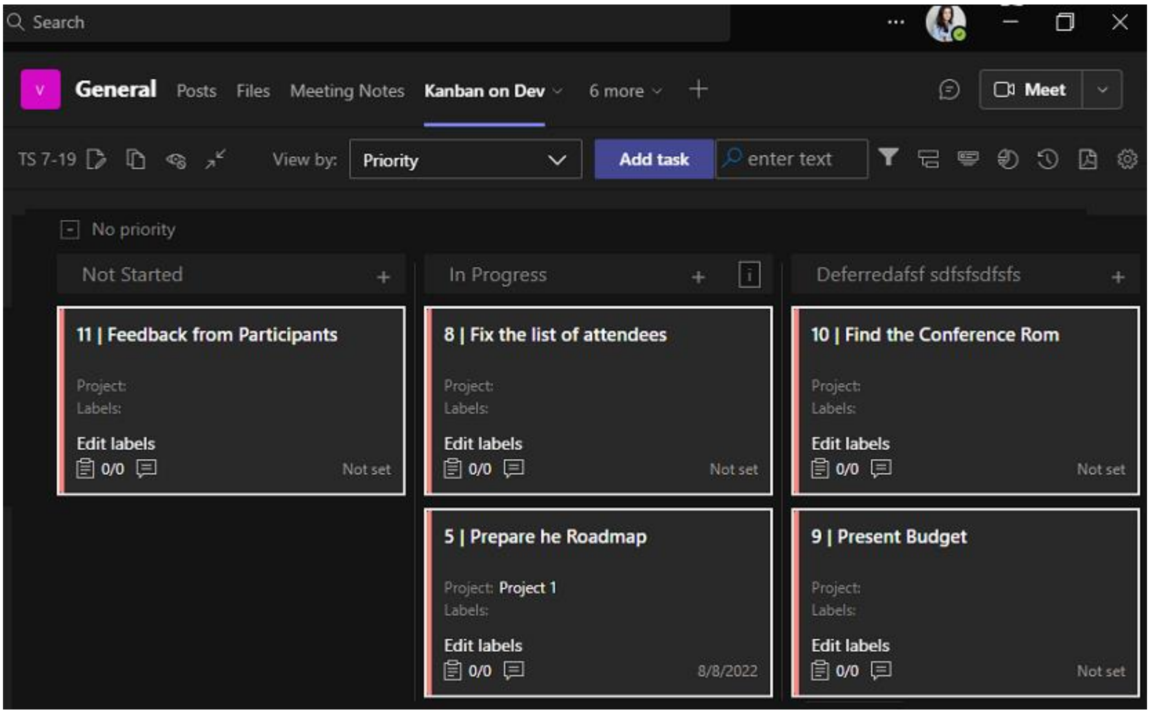


The screen will switch to the dark mode.



Now open the Teams channel where you have added the Virto Kanban Board as a separate tab. Or find how you can do this in the "How to Install Virto Kanban Board for Microsoft Teams" blog post.

The Virto Kanban Board will also become dark.



***Note**: if the board is somehow not synchronized to the Teams to mode, open the board settings (Advanced Setup) and make sure you have the checkbox "Use Microsoft Teams theme" chosen.*