

Virto Kanban Board Add-in for Office 365

User and Installation Guide

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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.

Name	Type	Items	Modified
Documents	Document library	32	6/23/2020 10:24 PM
Form Templates	Document library	0	6/23/2020 7:00 PM
Site Assets	Document library	8	6/23/2020 9:50 PM
Style Library	Document library	0	6/20/2020 10:14 PM
Product List	List	53	6/23/2020 7:38 PM
Kanban Board For Office 365	App		7/12/2020 3:57 PM

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.

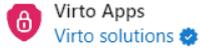
Step 4

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.



avlinnik@80jx7q.onmicrosoft.com

Permissions requested



This app would like to:

- Maintain access to data you have given it access to
- Read and write user and shared calendars
- Read user mailbox settings
- Sign in and read user profile
- Read all users' basic profiles
- Create, edit, and delete items and lists in all site collections
- Access mailboxes as the signed-in user via Exchange Web Services
- Consent on behalf of your organisation

If you accept, this app will get access to the specified resources for all users in your organisation. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their [Terms of Service](#) and [Privacy Statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

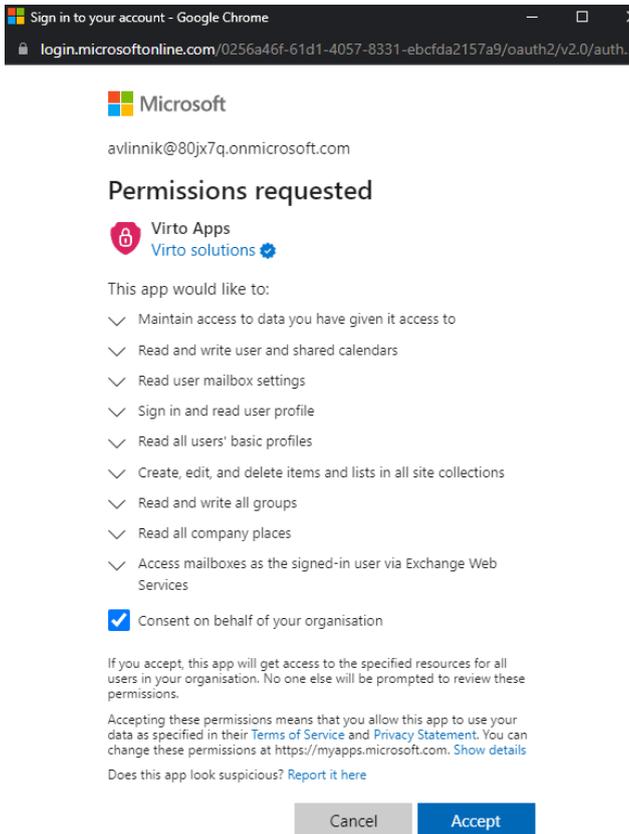
Cancel

Accept

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.

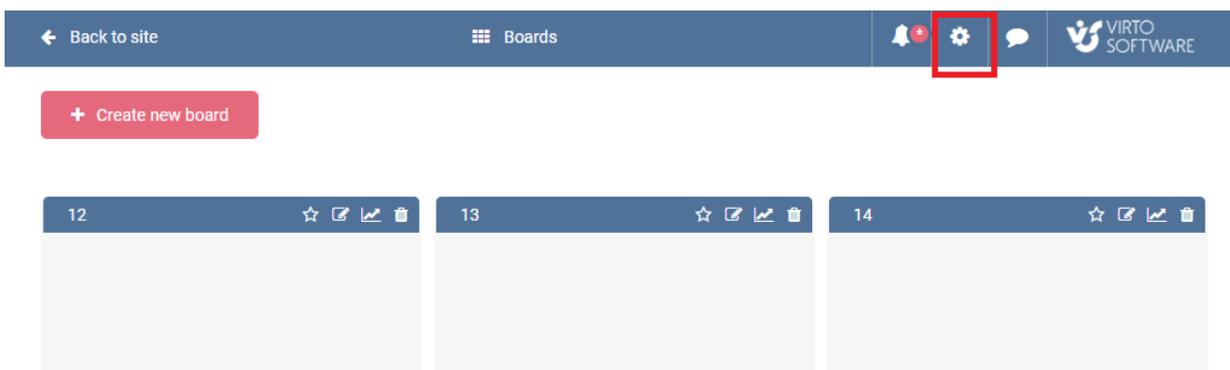
Important note: current Virto Kanban users may also receive the authorization request. In this case, please ask your SharePoint administrator to add the Virto Kanban application. Or, if you are the administrator, accept the request described above.

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](#).



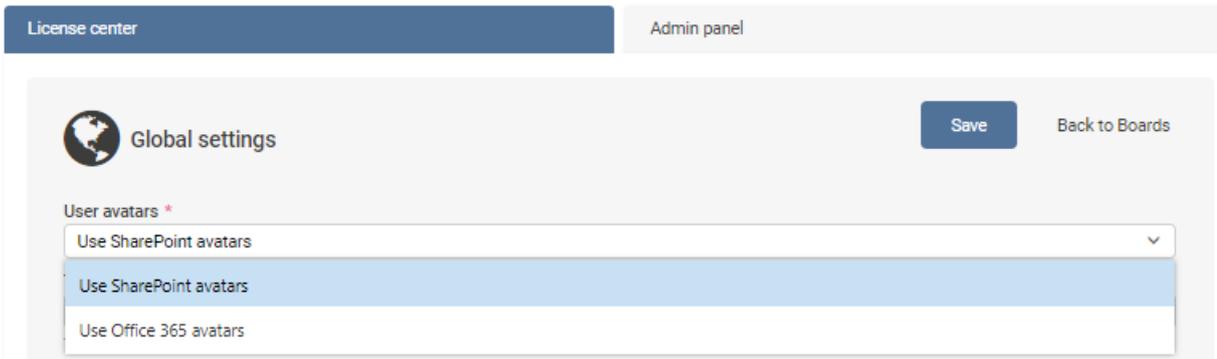
Note: when you install Virto Kanban App from the Office Store, 30-days free trial period is activated. If the trial period is over and you have not made a purchase yet, you can continue using Virto Kanban for free **with full functionality for 3 users.**

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

Save Back to Boards

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.

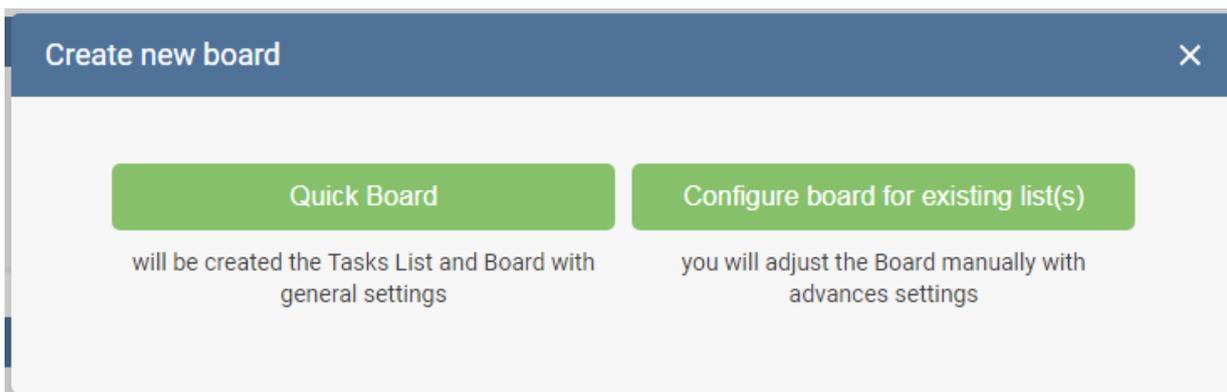
You can find the description of every role in the [Virto Kanban Board Permissions Guide](#).

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

Boards Page

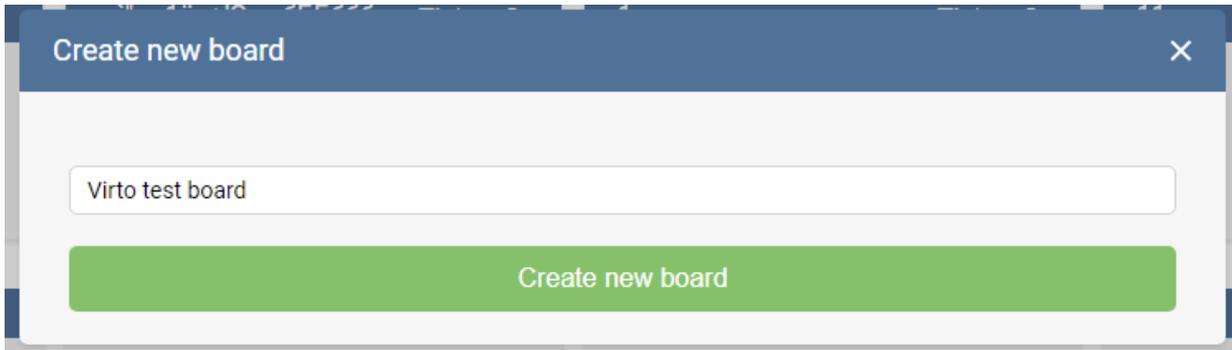
All existing boards from current site collection will be displayed on the boards page. There you can adjust an existing board or create a new one.

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.

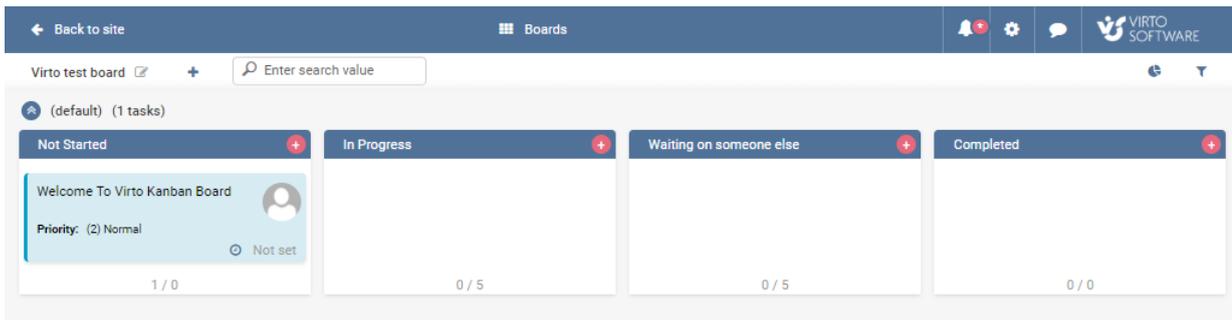


Creating a Quick Board

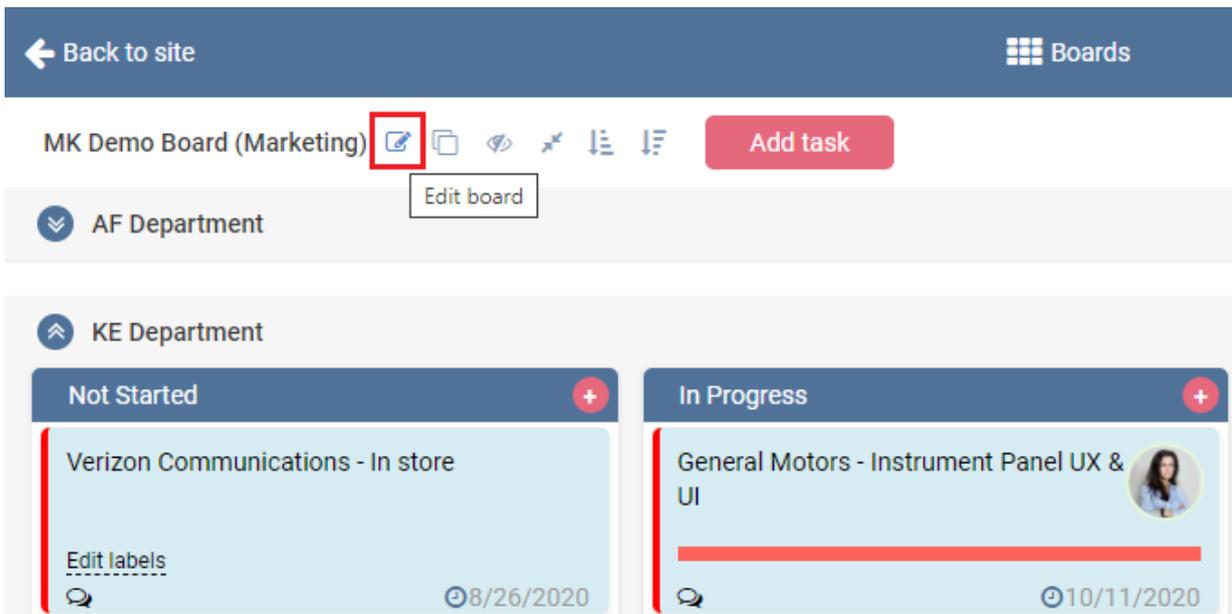
To create a new board quickly with “Quick board” feature, type a board name and customize it later.



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.

The screenshot shows the 'List Setup' tab selected. The 'Board name' field is highlighted with a red box and contains the text 'MK Demo Board (Marketing)'. Below it, the 'Board description' field contains 'Demonstration board with pack of test tasks for screenshots and video'. To the right of the description field are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'List Setup' tab selected. The 'Board name' field contains 'Virto Board 1' and the 'Board description' field contains 'Virto test board'. Below the description field is an unchecked checkbox labeled 'Make Board accessible on the current Site only.'. Under the 'Board lists' section, there are two links: 'Demo from VirtoWay Team Site' and 'WTasks from VirtoWay Team Site'. A prominent red button labeled 'Open lists picker' is located below these links. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows a 'Select list' dialog box. At the top, there's a title bar with a close button. Below it, 'Select site *' is set to 'Virtoway Team Site' and 'Available Content Types' is set to 'Task'. A search bar is on the right. Under 'Selected Lists:', two lists are shown: 'MK Demo Multiple Lists from Virtoway Team Site' and 'AB1 from Virtoway Team Site'. The main area contains a grid of list cards, each with a blue checkmark icon and a list name. The 'AB1' card has a small checkmark below it. At the bottom, there are 'Save' and 'Cancel' buttons.

Fields and Content Types

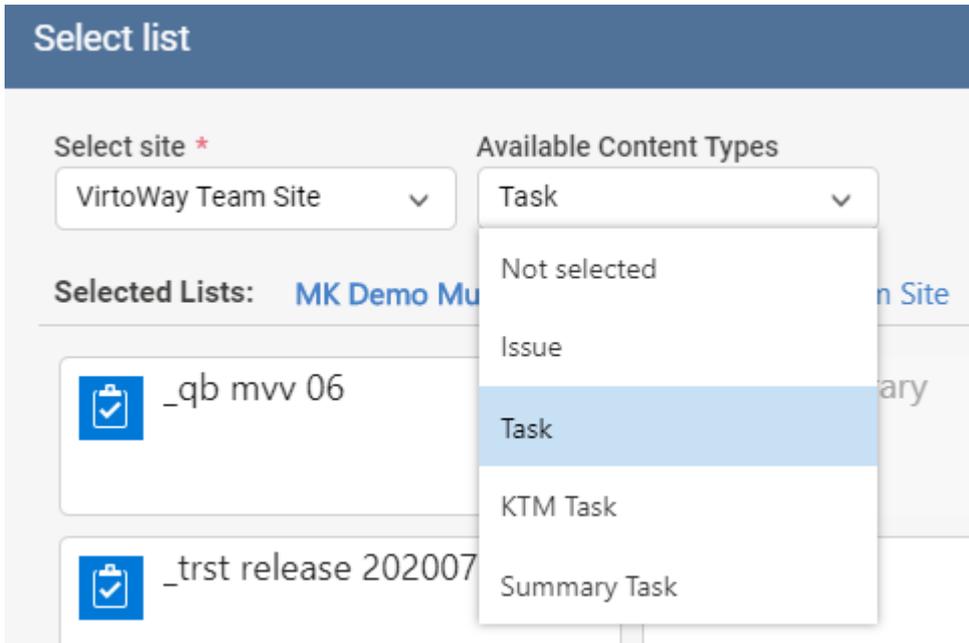
To adjust the board correctly, it is required to know how the fields of different types correspond to future board card fields. This is especially important, when you need to merge multiple lists in a single board.

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.

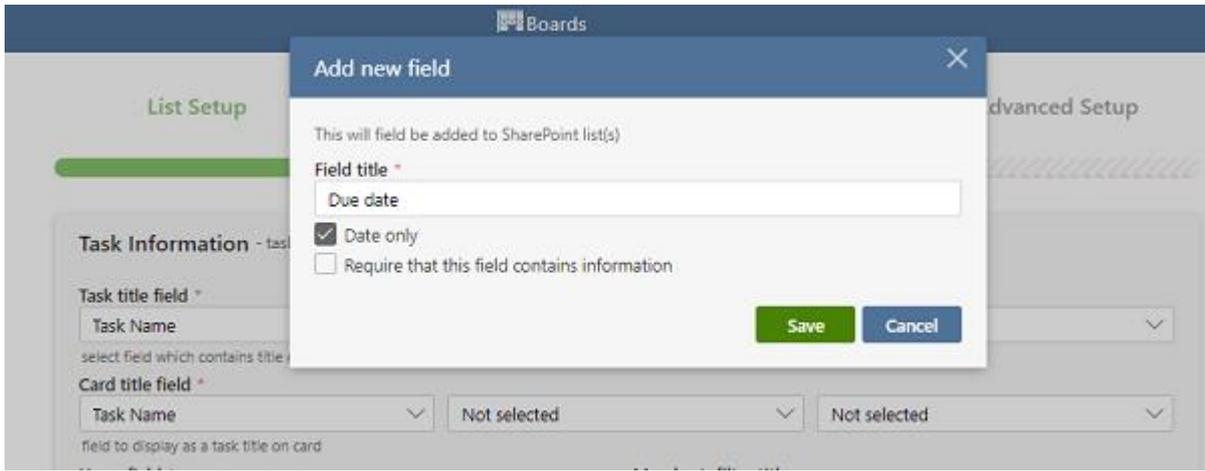
Adding Fields to Custom List

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

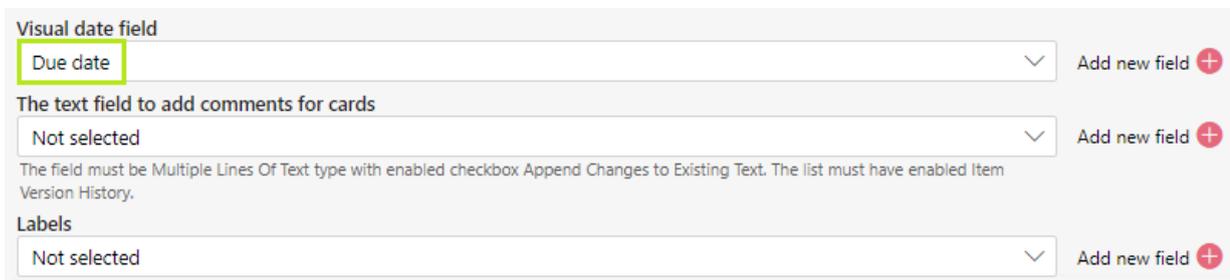
Start creating a list and choose "Create a board for existing list(s)". Choose a list from your SharePoint site in the list picker. When you have chosen a list and switched to the "Task Information" step, take a look at the fields. Some of them are already chosen, and some of them are not selected.

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.

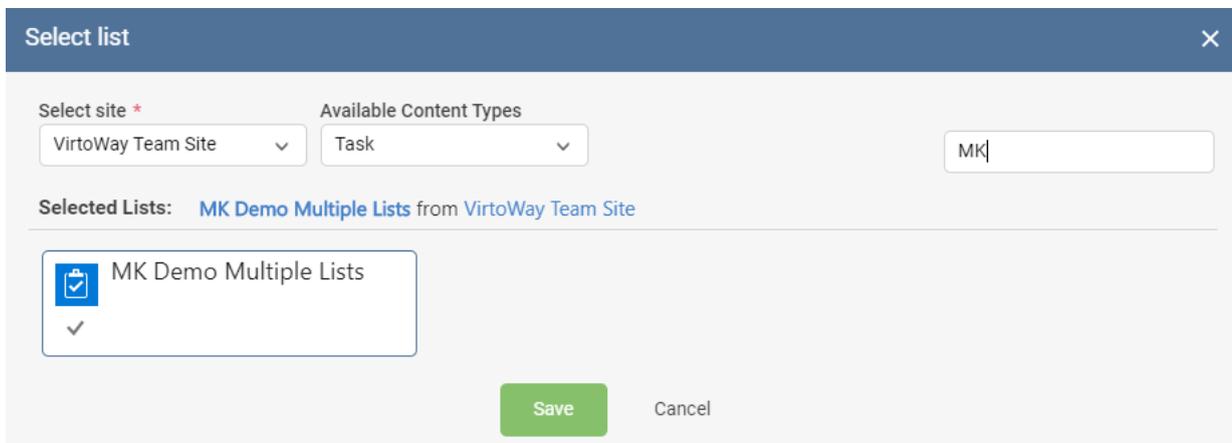


The option of adding fields is available for all users with the right of creating fields.

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.

Select list

Select site *

Available Content Types

Selected Lists: [MK Demo Mu](#) [n Site](#)

[_qb mvv 06](#)

[_trst release 202007](#)

Task

Not selected

Issue

Task

KTM Task

Summary Task

Select list ✕

Select site *

Available Content Types

Selected Lists: [MK Demo Multiple Lists](#) from [VirtoWay Team Site](#) [AB1](#) from [VirtoWay Team Site](#)
[AB2](#) from [VirtoWay Team Site](#) [AB3](#) from [VirtoWay Team Site](#)

<input checked="" type="checkbox"/> _qb mvv 06	<input type="checkbox"/> _test library	<input checked="" type="checkbox"/> _test release 201007-2
<input checked="" type="checkbox"/> _trst release 202007 -3	<input checked="" type="checkbox"/> 11111	<input checked="" type="checkbox"/> 123321123321
<input checked="" type="checkbox"/> AB1 ✓	<input checked="" type="checkbox"/> AB2 ✓	<input checked="" type="checkbox"/> AB3 ✓
<input checked="" type="checkbox"/> Agile Kanban	<input checked="" type="checkbox"/> AL1	<input type="checkbox"/> Alert for Announcements

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.

Select list

Select site *
Virtoway Team Site

Available Content Types
Task

Selected Lists: **MK Demo Multiple Lists** from **Virtoway Team Site**

_qb mvv 06

_test library

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).

List Setup | Board Setup | Cards Setup | Advanced Setup

Board [Save] [Cancel]

Board name *
Demonstration

Board description
Demonstration board with pack of test tasks for screenshots and video

Make Board accessible on the current Site only.

Board lists *
Sales&Marketing Demo from Virtoway Team Site
[Open lists picker]

Templates - save and load settings to (from) template file

[Save the board as a template] [Export board settings] [Import board settings]

[Save] [Cancel]

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

Cannot export
ID; Completed; Modified; Created; Created By; Modified By; Attachments;

Available fields

available values		selected values
Goal	>	Due Date
Points	<	Labels
Order		Parent ID
		Priority
		Project

Include content

[Preview data](#) [Export to file](#) [Cancel](#)

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”).

Export
✕

Task Name: Medicare - Platform for better handling patients

Predecessors:

Priority: (1) High

Task Status: Waiting on someone else

% Complete: 0.5

Assigned To: mk@virtoway.com

Description:

Start Date: 13.08.2020 00:00.00

Due Date:

Parent ID:

KanbanComments:

Labels: Needs duscussion; Partnership; Test Mode; Meetings; Ideas; Changes; Conference room

Project: AF Department

Task Name: Sony Digital - Mobile App and Website

Predecessors:

Priority: (2) Normal

Task Status: Deferred

% Complete: 0.5

Assigned To: mk@virtoway.com

Description: Prepare the concept, the detailed plan is required. Present before the deadline to discuss and...

Start Date: 28.10.2020 00:00.00

Due Date: 21.07.2021 00:00.00

Preview data
Export to file
Cancel

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.

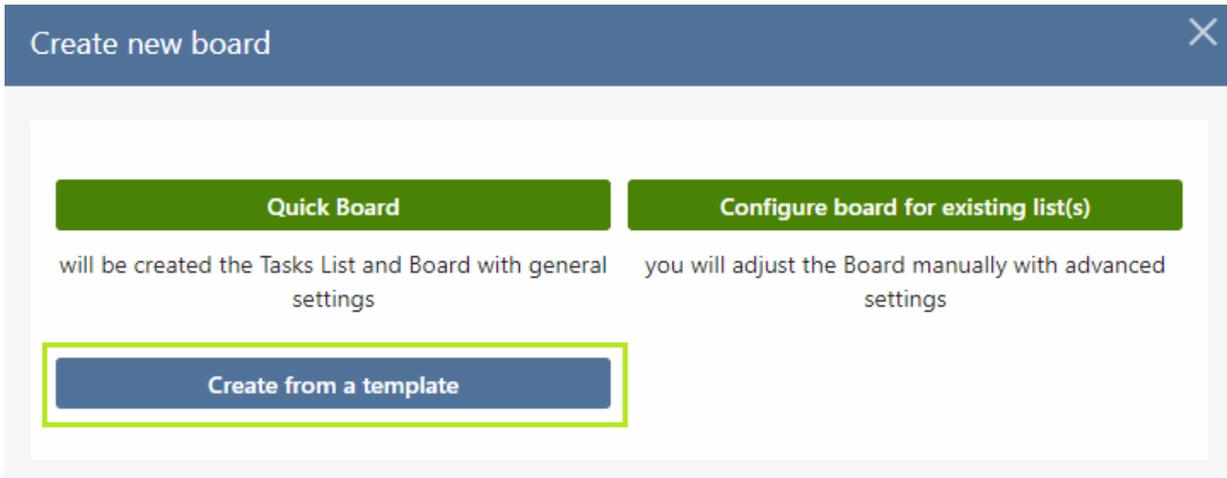
← Back to site
📅 Boards

+ Create new board

Favorite Boards

★ ✎ 🕒 🔄 🗑️ Agile Kanban	★ ✎ 🕒 🔄 🗑️ Contracts
★ ✎ 🕒 🔄 🗑️ Demonstration Demonstration board with pack of test tasks ...	★ ✎ 🕒 🔄 🗑️ Help Desk
★ ✎ 🕒 🔄 🗑️ Hiring Database hiring database	★ ✎ 🕒 🔄 🗑️ Marketing VirtoSoftware
★ ✎ 🕒 🔄 🗑️ MK Demo Multiple Lists	

Now click “**Create from a template**” — the button we’ve added in this update.

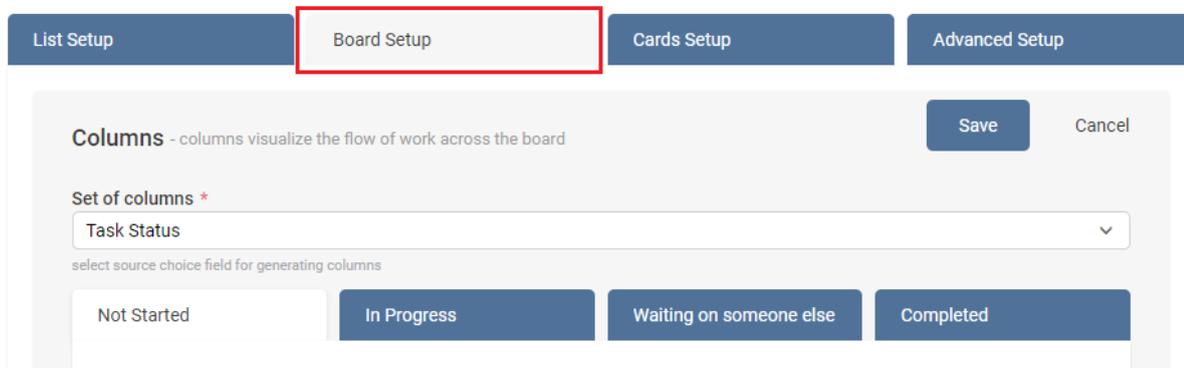


Then choose the previously saved template file from your disc and start working.

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.

Columns - columns visualize the flow of work across the board

Save Cancel

Set of columns *

Task Status

select source choice field for generating columns

Not Started In Progress Waiting on someone else Completed

Title *

Not Started

Column value

Not Started

Max work tasks *

20

The maximum number of tasks displayed in this column. Setting it to 0 specifies no limit.

Count +

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.

Not Started In Progress Completed Deferred ... Waiting on som...

Title *

Deferred

Column value

Deferred

Delete

Move left

Move right

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

Completed ... Waiting on someone...

Delete

Move left

Move right

Insert left

Insert right

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

Not Started Tasks In Progress

Title *

Not Started Tasks

Column value

Not Started

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.

Enable WIP restrictions

WIP limit for each swimlane *

2

If WIP limit is exceeded, the column tickets count for each swimlane will be highlighted. If “Enable WIP restrictions” is activated, new tickets addition is blocked. Setting to 0 specifies no limit.

Max work tasks *

20

The maximum number of tasks displayed in this column. Setting it to 0 specifies no limit.

Count +

WIP-limit appears at the bottom of the column.

In Progress

Write webinar agenda
Hours: 2
Task Name: Write webinar agenda
Due Date: 9/29/2018
9/13/2018 11:23 PM

Publish post
Hours: 3
Task Name: Publish post
Due Date: 9/21/2018
9/19/2018 10:57 AM

Publish ads
Hours: 3
Task Name: Publish ads
Due Date: 9/27/2018
9/19/2018 8:09 PM

3 / 2

“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.

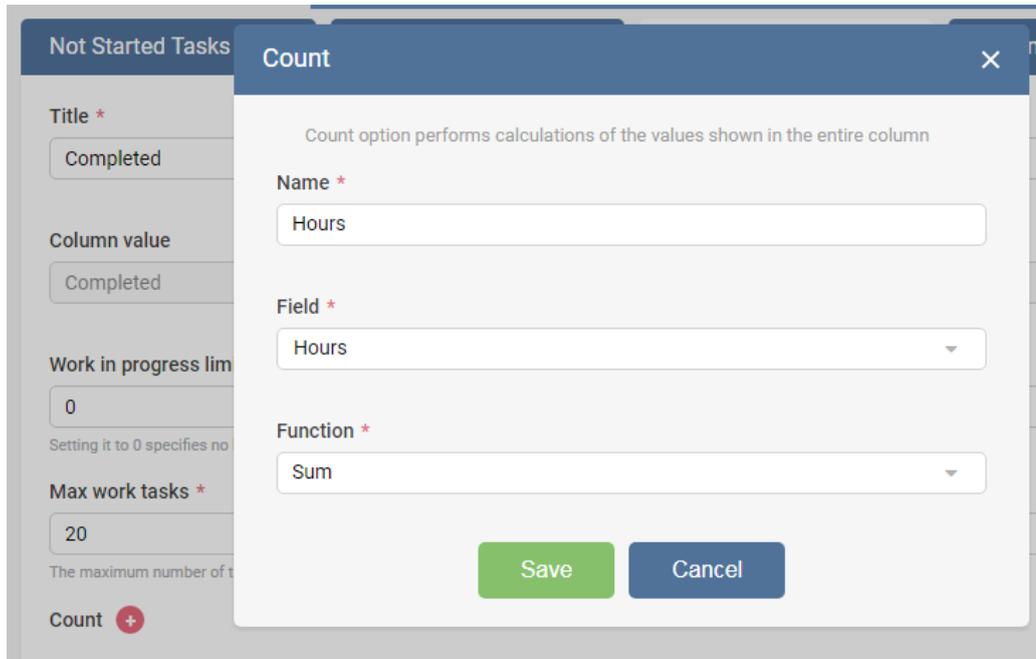
If WIP limit is exceeded, the column tickets count for each swimlane will be highlighted. If "Enable WIP restrictions" is activated, new tickets addition is blocked. Setting to 0 specifies no limit. Default swimlane has no limit.

Max work tasks *

The maximum number of tasks displayed in this column. Setting it to 0 specifies no limit.

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.

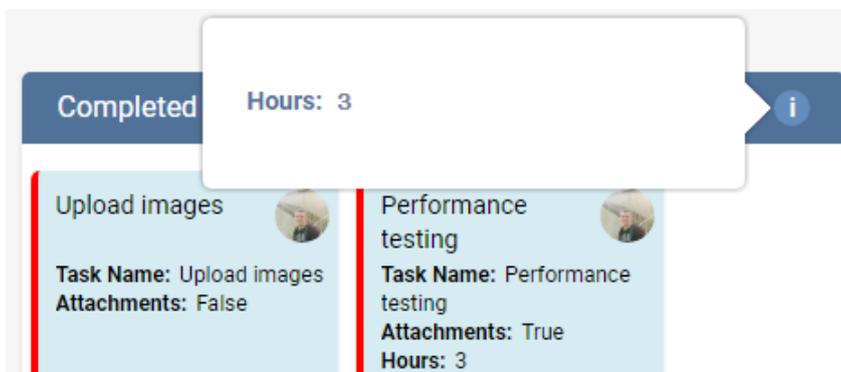
Click "+" next to the "Count" and set values in appeared pop-up window, then click "Save" to save the settings.



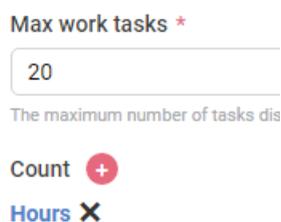
Current version of Virto Kanban has two functions – Sum and Average.

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.

add swimlane +

(default lane) Name *

(1) High (1) High

(2) Normal

(3) Low

Delete

Move up

Move down

You can rename swimlanes.

AF Department

KE Department

Name *

AF Department

Value

AF Department

Is collapsed by default

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.

AF Department

KE Department

Name *

AF Department

Value

AF Department

Is collapsed by default

AF Department

KE Department

Not Started +

Verizon Communications - In store

Edit labels

8/26/2020

JPMorgan Chase - Financial Dashboard

Edit labels

8/26/2020

In Progress +

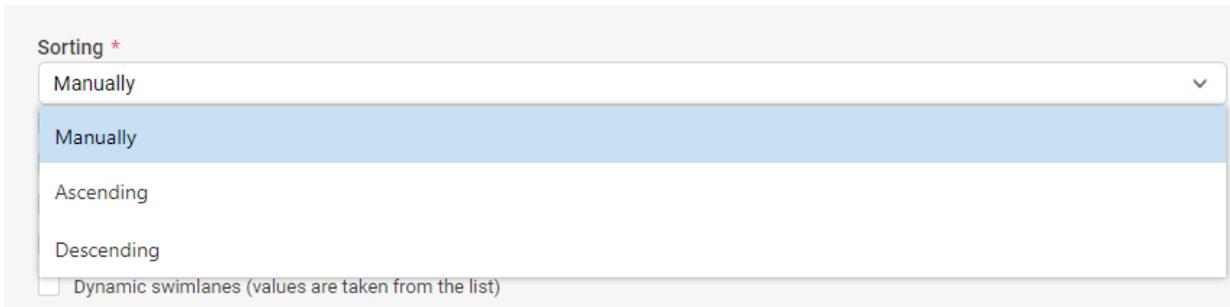
General Motors - Instrument Panel UX & UI

10/11/2020

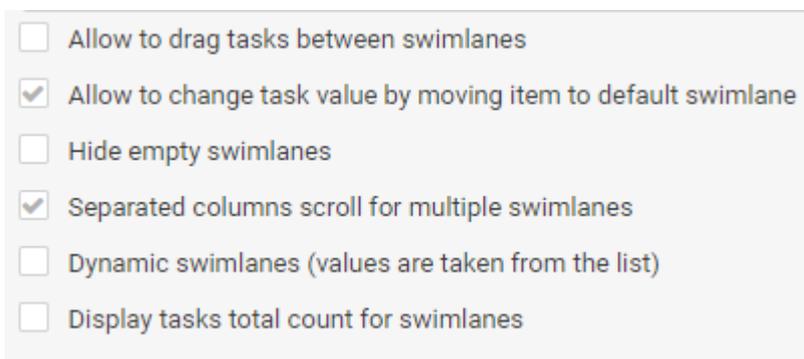
General Electric - Tablet App

8/14/2020

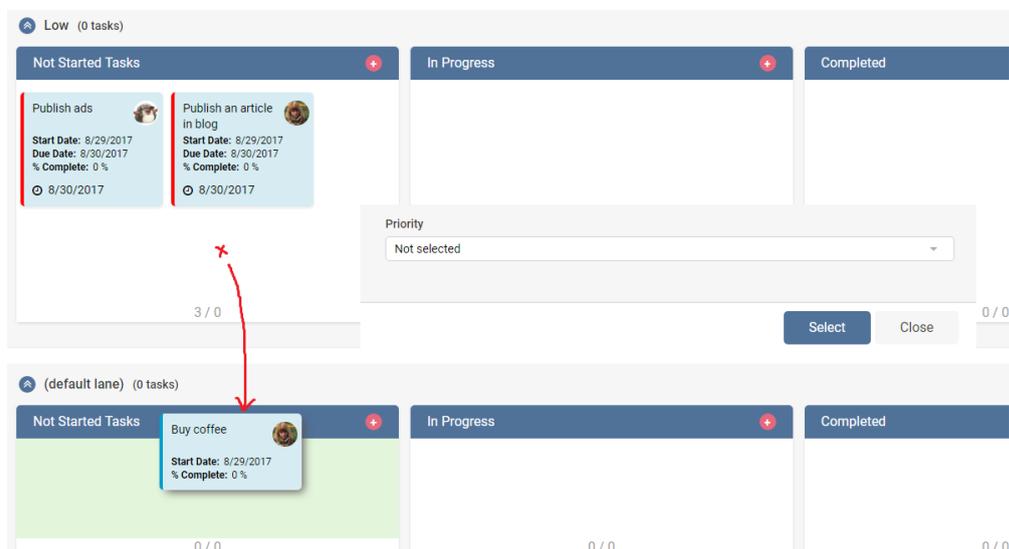
You can apply the task sorting feature to change the order of tasks inside a column or inside a row.



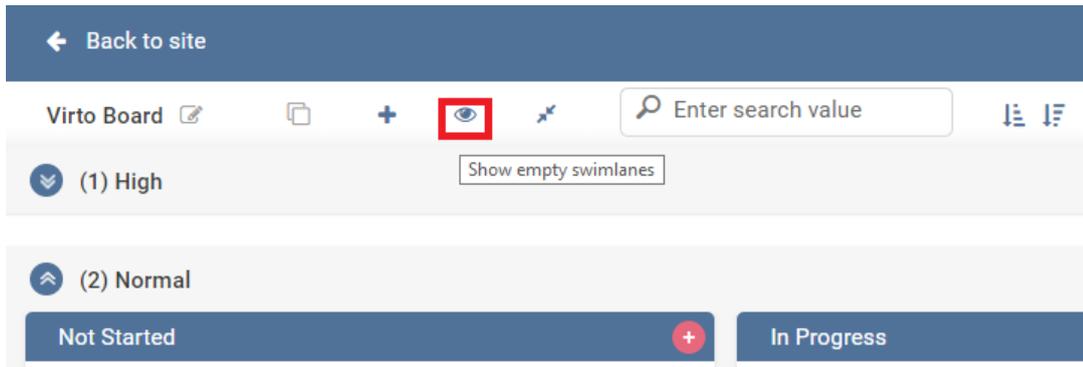
Sorting manually means sorting with drag-and-drop feature. You can also sort tasks in descending or ascending order by title.



- 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 project.
- 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.

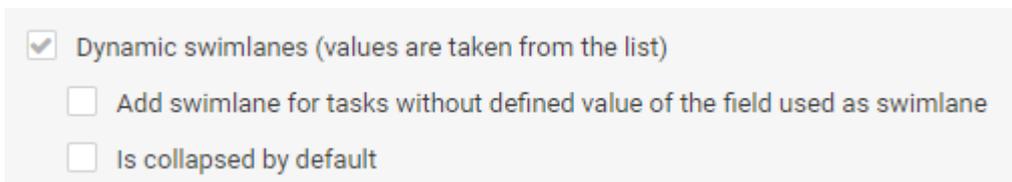


- 3) “**Hide empty swimlanes**” option allows you to hide swimlanes that don’t contain any tasks at the moment. You can show them again using the button on the board header.



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

Display tasks total count for swimlanes

Select columns that will be used in tasks total count for each swimlane

Not Started

In Progress

Waiting on someone else

Completed

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.

High priority (5 tasks)

Not Started Tasks	In Progress	Completed
<ul style="list-style-type: none"> Write webinar agenda Start Date: 8/24/2017 Due Date: 8/24/2017 % Complete: 0 % 8/24/2017 Performance tuning Start Date: 3/1/2016 Due Date: 9/15/2016 % Complete: 0 % 9/15/2016 Team meeting +2 Start Date: 3/31/2016 Due Date: 3/9/2016 % Complete: 0 % 3/9/2016 <p>3 / 0</p>	<ul style="list-style-type: none"> Presentation Start Date: 8/23/2017 Due Date: 8/26/2017 % Complete: 50 % 8/26/2017 Departmental budget Start Date: 8/24/2017 Due Date: 8/24/2017 % Complete: 50 % 8/24/2017 <p>2 / 0</p>	<ul style="list-style-type: none"> Buy coffee Start Date: 8/29/2017 % Complete: 100 % Upload images Start Date: 6/4/2016 Due Date: 5/6/2016 % Complete: 100 % 5/6/2016 Performance testing Start Date: 7/29/2016 Due Date: 7/30/2015 % Complete: 100 % 7/30/2015 <p>3 / 0</p>

Views & Filters

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

Views & Filters Views & Filters description

Allow filter by user

Sales&Marketing Demo
Select list views to apply them as filters

available values

- All Tasks
- Late Tasks
- Completed
- My Tasks
- Gantt Chart
- Calendar

selected values

- Upcoming

Save Cancel

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

Views & Filters Views & Filters description

Allow filter by user

Sales & Marketing Demo
Select list views to apply them as filters

available values

All Tasks

Apply

Filters

Members

- Anna Timoni
- Maria Kosareva

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

Enter search value

Waiting on someone else

Exxon Mobile - Internal communications app

10/8/2020

Completed

American Airlines - Responsive Website

Not set

Apply

Current views

Tasks

Not selected

Filters

- Tasks in August
- Urgent tasks
- Personal filter

Members

- Alex Ant
- Dmitry Leytner

You can define which list views to use as filters.

Views & Filters Views & Filters description

Allow filter by user

Sales&Marketing Demo
Select list views to apply them as filters

available values

- All Tasks
- Completed
- Gantt Chart
- Calendar

selected values

- Late Tasks
- Upcoming
- My Tasks

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

Apply

Current views
Sales&Marketing Demo

Upcoming

- Not selected
- Late Tasks
- Upcoming
- My Tasks

 Anna Timofeeva

Cards Setup

Continue your board adjustment in the cards setup tab.

List Setup Board Setup **Cards Setup** Advanced Setup

Task Information - task appearance Save Cancel

Task title field *
Task Name

select field which contains title of task

Card title field *
Task Name Not selected Not selected

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).

Task Information - task appearance

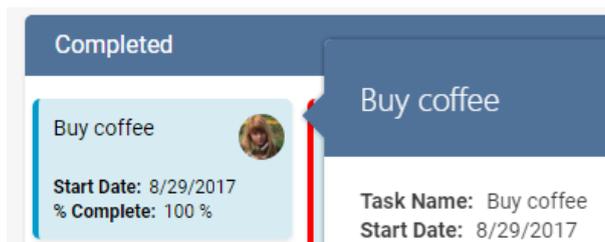
Task title field *

Task Name

Card title field *

Task Name Not selected Not selected

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).

Task title field *

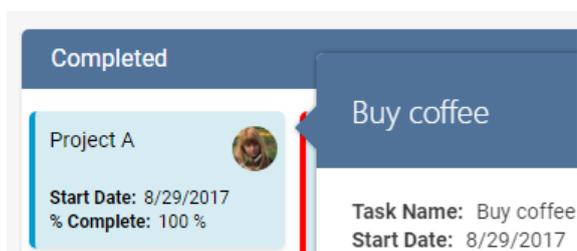
Task Name

select field which contains title of task

Card title field *

Project

field to display as a task title on card



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.

Users field *

Assigned To

Assigned To Assigned To

Created By

Modified By

Labels

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.

Visual date field

Start Date

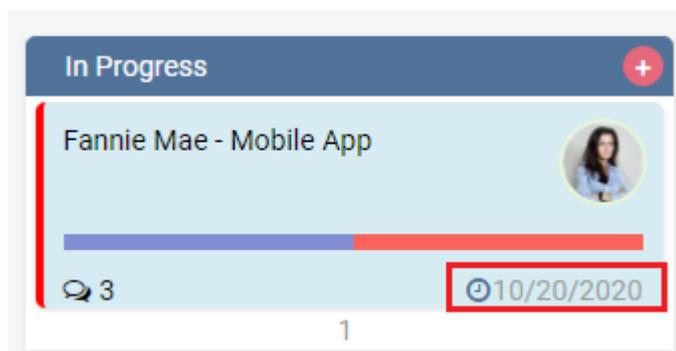
Not selected

Start Date

Due Date

Modified

Created



Labels

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

Labels

Labels

Allow users with edit rights to add new labels



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

Settings › Edit Column ⓘ

Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes
- No

Enforce unique values:

- Yes
- No

Type each choice on a separate line:

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

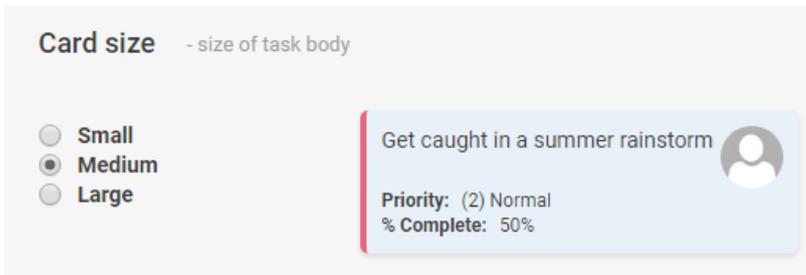
Just choose this column in the cards setup settings block.

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.

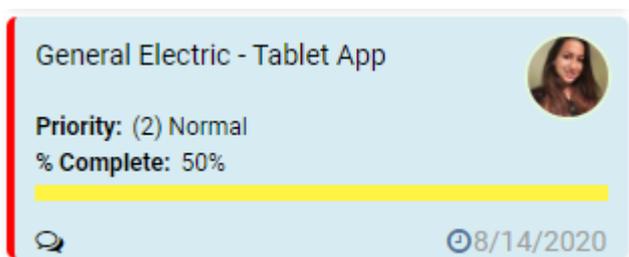
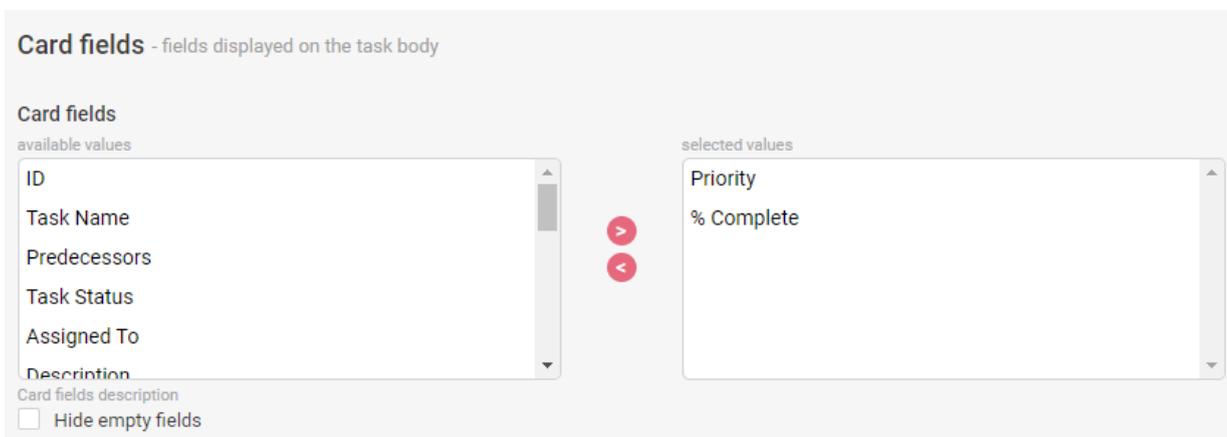
The screenshot shows a Kanban board interface. On the left, there's a sidebar with a 'Back to site' button and a 'Boards' header. Below that, there's a task card titled 'MK MK test' with an 'Add task' button. The main area shows a task card in edit mode. The card title is 'MK MK TEST ITEM #1' and the description is 'IMedicare - Platform for better handling patients'. The 'Task Status' is 'In Progress', 'Assigned To' is 'Maria Kosareva', and 'Priority' is '(1) High'. The 'Labels' section shows two labels: 'needs duscussion' (green) and 'partnership' (yellow). A color picker is open over the 'partnership' label, showing a yellow color with hex code #fff343.

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.

Tooltip - task callout settings

Tooltip fields

available values

- ID
- Task Name
- Predecessors
- Task Status
- Assigned To
- Parent ID

selected values

- Description
- Due Date
- Labels

Callout fields description

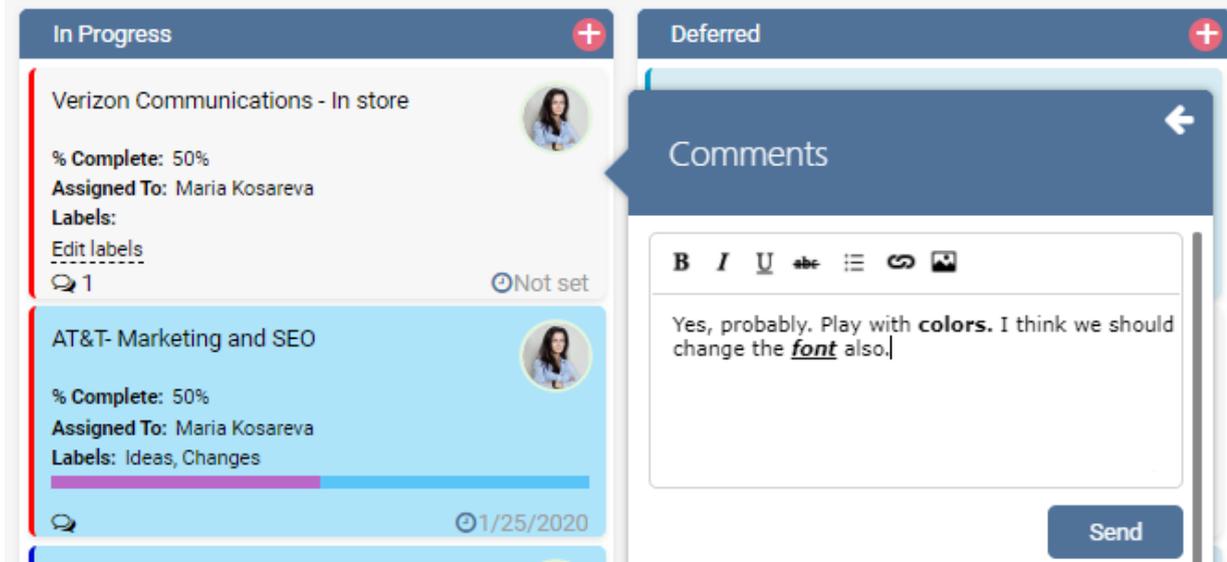
The screenshot shows a task board with two columns: 'In Progress' and 'Waiting on someone else'. The 'In Progress' column contains three task cards: 'Sony Digital - Mobile App and Website' (80% complete, due 10/26/2020), 'UnitedHealth Group - Website' (30% complete, due Not set), and 'Daimler - Digital Brochure' (50% complete). A tooltip is open over the 'Sony Digital' task, displaying its details: Description: 'Prepare the concept, the detailed plan is required. P resent before the deadline to discuss and...', Due Date: '10/26/2020', and Labels: 'Needs discussion, Partnership, Test Mode'. The tooltip also shows the user's name 'Maria Kosareva' and an 'Edit' button.

Comments

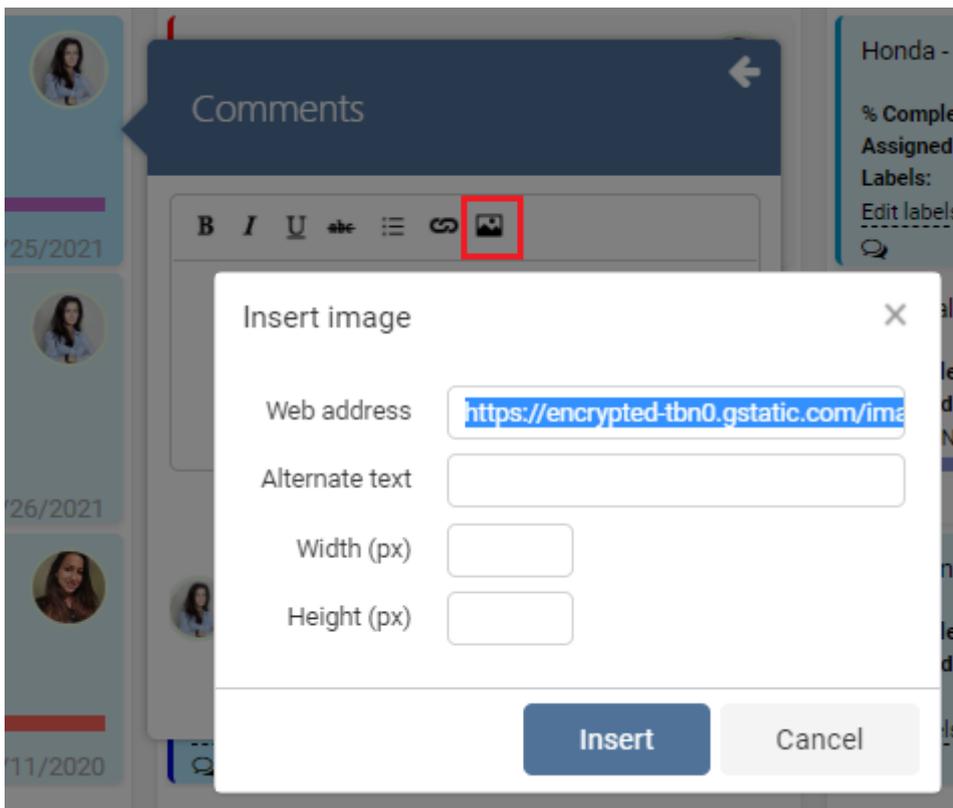
You can add comments to your tasks. Click the comment icon and type the message you'd like to leave.

This screenshot shows the same task board as above, but with a comment box open for the 'Sony Digital - Mobile App and Website' task. The comment box has a title 'Comments' and a text area containing the text 'How is it going?'. Above the text area is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, and Image. A 'Send' button is located at the bottom right of the comment box.

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.

The screenshot displays a Kanban board with two columns: 'In Progress' and 'Deferred'. The 'In Progress' column contains three items, each with a 50% completion status and assigned to Maria Kosareva. The 'Deferred' column is currently empty. A 'Comments' modal is open, showing a comment from Maria Kosareva on July 6, 2021, at 1:41:39 PM. The comment text is 'I think it should look like this. Any thoughts?' and includes a circular flow diagram with five nodes: 'Research' (yellow), 'Design' (green), 'Development' (teal), 'Testing' (blue), and 'Deployment' (green), connected by arrows in a clockwise cycle.

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.

Name and Type

Type a name for this column.

Column name:

KanbanComments

The type of information in this column is:

Multiple lines of text

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

 Yes No

Number of lines for editing:

6

Specify the type of text to allow:

- Plain text
 Rich text (Bold, italics, text alignment, hyperlinks)
 Enhanced rich text (Rich text with pictures, tables, and hyperlinks)

Append Changes to Existing Text

 Yes No

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

[Home](#)
[Test Subsite](#)
[Community Subsite](#)
[Infrastructure&Transport](#)
[Special Projects](#)
[Explorations](#)
[Den](#)

Settings ▸ Versioning Settings

Content Approval

Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Require content approval for submitted items?

 Yes No

Item Version History

Specify whether a version is created each time you edit an item in this list. [Learn about versions.](#)

Create a version each time you edit an item in this list?

 Yes No

Keep the following number of versions:

Keep drafts for the following number of approved versions:

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.

Card fields

available values

- Due Date
- Parent ID
- Completed
- Points
- Labels
- Project

selected values

- Priority
- % Complete
- KanbanComments**

Card fields description

Hide empty fields

Tooltip - task callout settings

Tooltip fields

available values

- Start Date
- Parent ID
- Completed
- Points
- Project
- Modified

selected values

- Description
- Due Date
- Labels
- KanbanComments**

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

Comments

B I U abc   

Working on it...]



Send

 Maria Kosareva new

How is it going?

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

Sony Digital - Mobile App and Website 

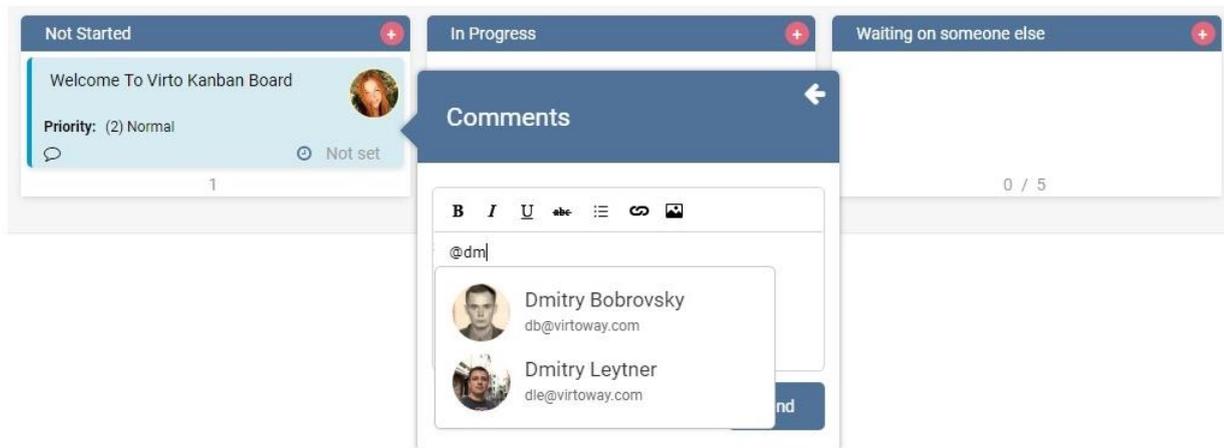
Priority: (2) Normal

% Complete: 80%

KanbanComments: Working on it...

 2 10/26/2020

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.

Short view - short view settings

Short view fields

available values	selected values
ID	Description
Task Name	Due Date
Predecessors	Attachments
Priority	Assigned To
Task Status	

Short view fields description

Full view new/edit full view

Full view fields

available values	selected values
Predecessors	Assigned To
Parent ID	Description
Goal	Start Date
Order	Due Date
	KanbanComments

Full view fields description

open form by double click

Styles

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

Border color * #009ccc
Color of the marker on the left side of a task

Body color * #d6ecf2
Task's body color

Font color * #000
Task's font color

Style rules

Add style rule

Suggested Style rules

Adjust settings to fit your list's fields and values before enabling, Inherited from other styles

Overdue

Name *
Overdue

Border color #ff0000
Color of the marker on the left side of a task

Body color Inherited from other styles
Task's body color

Font color Inherited from other styles
Task's font color

Conditions

And/Or	Field	Operator	Value
+ x	Due Date	is less than	@Today
+ x	And	Due Date	is not null

+ Add new clause

DueDate is less than 2 days

High Priority

Low Priority

You can set custom conditions and color-code tasks according to a condition rule. There are 4 suggested style rules already customized. You can deactivate 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.

Project A
✖

Name *

Border color

style rule color of the marker on task's left side

Body color

task body color with applied style rule

Font color

task font color with applied style rule

Conditions

	And/Or	Field	Operator	Value
+ ✖		Project	is equal to	Project A
+ ✖	Or	Assigned To	is equal to	39;dh@virto.com
+ Add new clause				

Time consuming tasks
✖

Name *

Border color

style rule color of the marker on task's left side

Body color

task body color with applied style rule

Font color

task font color with applied style rule

Conditions

	And/Or	Field	Operator	Value
+		Hours	is greater than	5
+ Add new clause				

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

In Progress
+

Presentation

Project: Project C

🕒 9/2/2017

Departmental budget

Project: Project A

🕒 9/1/2017

Performance testing

Hours: 8

Project: Project B

🕒 9/1/2017

3 / 0

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.

You have completed general Board configuration. You can adjust additional settings now or later.

Advanced Setup

Go to Board

Advanced Setup

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

The screenshot shows the 'Advanced Setup' tab selected in a navigation bar. Below the navigation bar, there is a 'Filters' section with the title 'Filters' and a subtitle 'Filters description'. To the right of the title are 'Save' and 'Cancel' buttons. A red 'Add filter' button is visible. Below it, a filter card is shown with the text 'High priority' and two icons (a plus sign and a trash can) on the right side.

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.

Filters

[Add filter](#)

Urgent tasks
📄 🗑️

Name *

is enable by default

Conditions operator

AND

OR

Conditions

	And/Or	Field	Operator	Value
+ X		Due Date	is greater than or e	@Today- 3
+ X	And	Due Date	is less than	@Today+ 1

[+ Add new clause](#)

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”.

📄 Apply

Current views

Tasks

Not selected

Filters [📄](#)

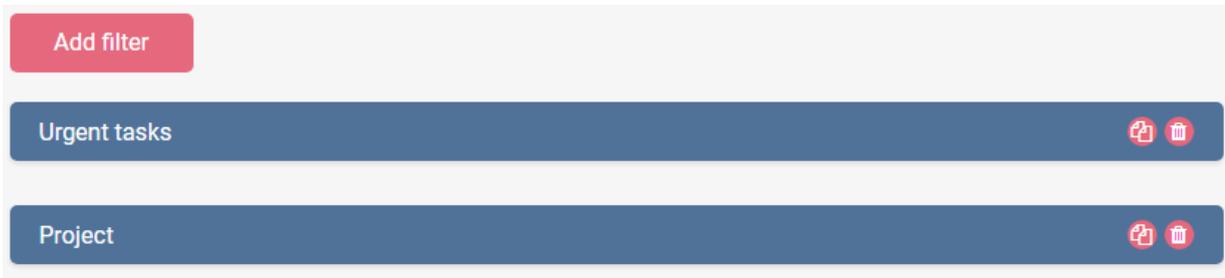
Tasks in August

Urgent tasks
✓

[👤 Personal filter](#)

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.

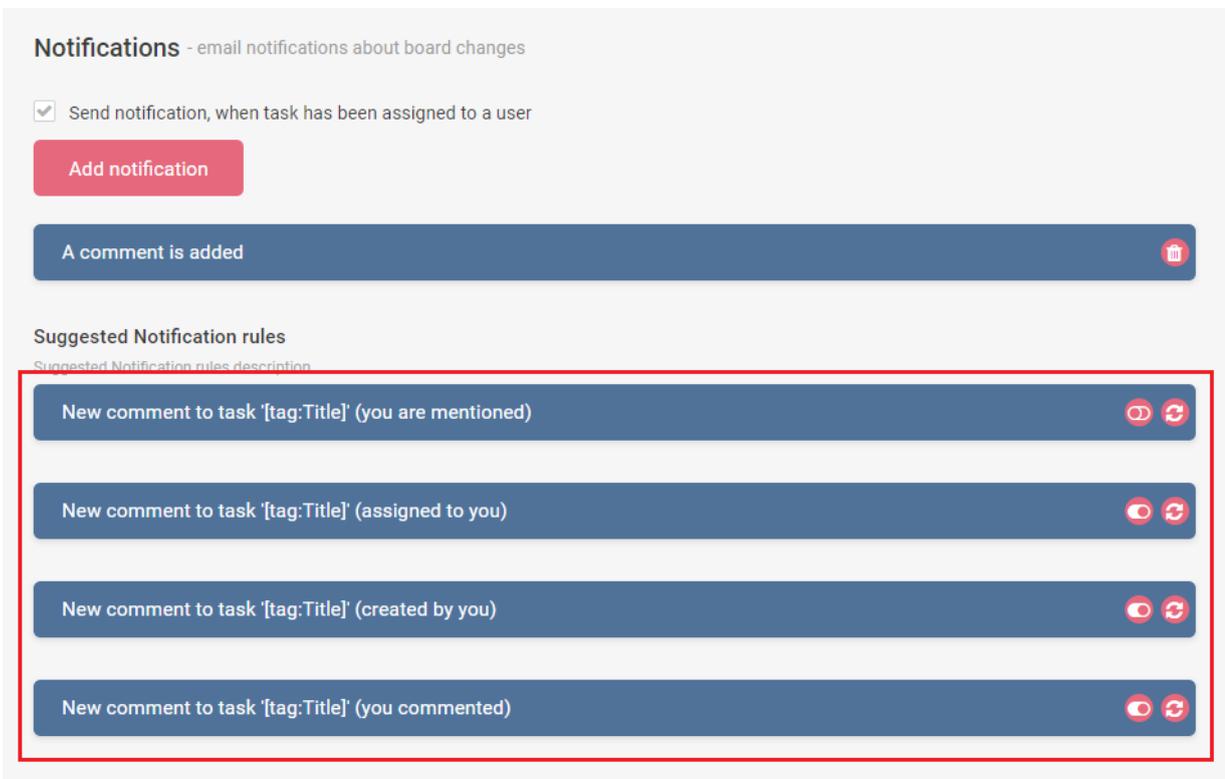
You can copy or delete a filter, using the icons in the right upper corner of a filter.



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.

The screenshot shows a 'Task Watchers' dialog box overlaid on a task list. The task list on the left includes items like '55 | Release documentation', '33 | Reporting part 1', and '5 | Labels'. The dialog box has a title bar 'Task Watchers' with a back arrow. It contains three sections: 'Any task updates', 'Comments', and 'Ignore admin comments rule'. Each section has a text input field with the placeholder 'Enter a name or email address...'. The 'Ignore admin comments rule' section is highlighted with a red border. At the bottom, there are 'Save' and 'Cancel' buttons.

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

The screenshot shows a notification configuration form. The title bar reads 'New comment to task [tag:Title] (you are mentioned)'. Below the title bar, there is a checkbox to 'Enable this notification to allow mentioning users in comments'. The 'Notification title' field contains the text 'New comment to task [tag:Title] (you are mentioned)'. Below the title field is a rich text editor with various formatting options (bold, italic, underline, etc.). At the bottom, there are 'Insert tags' and 'Insert field values' sections with buttons for 'Recipient Name', 'Board Link', 'Task Link', 'Comment value', 'Add one by one', 'Old value', 'Task Name', and 'Add'.

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

Notifications - email notifications about board changes

Add notification

Completed task 🗑️

Notification title *

Completed task

Users receiving this notification *



Alex Shell



Michael Rava



Enter a name or email address...

Conditions

Task Name

is equal to

Product testing

Task Status

is equal to

Completed

Condition +

Permissions

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

Permissions

Everyone can edit settings

Boards admin



Maria Kosareva



Enter a name or email address...

Users list with permission to edit board settings

Default user permissions *

No access

If not defined by the site collection

Edit



Maria Kosareva



Enter a name or email address...

Full access list for managing all tasks

View only



Anna Timofeeva



Enter a name or email address...

Users or (and) groups list with permission to view this board

No access

Users or (and) groups list with no access to this board

Please check for detailed permissions information in the [Virto Kanban Board Permissions Guide](#).

Additional

Additional options are placed into this block of settings.

Additional

- Show/Hide "Add new task" button
- Allow editing directly on card

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

The screenshot shows a Kanban board interface. At the top, there is a navigation bar with a "Back to site" button and a "Boards" menu. Below this, the board title "MK Demo Board (Marketing)" is displayed with several icons. A red box highlights the "Add task" button. The board content shows two columns: "Not Started" and "In Progress". The "Not Started" column contains a task card for "Ford Motor - In-dash UI" with a priority of (1) High and 0% completion. The "In Progress" column contains a task card for "Sony Digital - Mobile App and Website" with a priority of (2) Normal and 80% completion. A red box highlights the "Add task" button.

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

The screenshot shows two task cards side-by-side. The left card is for "Sony Digital - Mobile App and Website" with a priority of (2) Normal. The right card is the same task, but the "Priority" field is underlined and a dropdown menu is open, showing options: (None), (1) High, (2) Normal, and (3) Low. A red box highlights the "Priority" field on the left card.

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.

The screenshot displays the Virto Office 365 Kanban Board App interface. At the top, there is a navigation bar with a 'Back to site' link, a 'Boards' menu, and a search bar. Below the navigation bar, the main content area is divided into two sections: 'AF Department' and 'KE Department'. Each department section contains four columns representing different task stages: 'Not Started', 'In Progress', 'Waiting on someone else', and 'Completed'. Each column contains task cards with details such as task name, priority, completion percentage, and due date. For example, in the 'AF Department', the 'Not Started' column has two tasks: 'Ford Motor - In-dash UI' and 'BNP Paribas - Android App'. The 'In Progress' column has two tasks: 'Sony Digital - Mobile App and Website' and 'UnitedHealth Group - Website'. The 'Waiting on someone else' column has two tasks: 'Exxon Mobile - Internal communications app' and 'Samsung - Digital Market Place'. The 'Completed' column has two tasks: 'American Airlines - Responsive Website' and 'AT&T Marketing and SEO'. The 'KE Department' section follows a similar structure with tasks like 'Verizon Communications - In store', 'General Motors - Instrument Panel UX & UI', 'Cardinal Health - Promo Landing', and 'CVS Health - UX for In-store app map'.

Copy to the Clipboard

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

This close-up screenshot focuses on the header area of the Kanban board. At the top left, there is a 'Back to site' link. Below it, the board title 'MK Demo Board (Marketing)' is displayed along with several icons: a document icon (highlighted with a red box), a magnifying glass, a share icon, and a list icon. To the right of these icons is a red 'Add task' button. Below the header, the first two columns of the board are visible: 'Not Started' and 'In Progress'. The 'Not Started' column contains a task card for 'Ford Motor - In-dash UI' with a priority of (1) High and 0% completion. The 'In Progress' column contains a task card for 'Sony Digital - Mobile App' with a priority of (1) High and 80% completion.

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

The screenshot shows a Kanban board with three columns: 'In Progress', 'Waiting on someone else', and 'Completed'. A task card for 'Sony Digital - Mobile App and Website' is highlighted in the 'In Progress' column. A red box highlights the copy icon on the task card, with a tooltip that says 'Copy this task link to clipboard'. The task details are shown in a modal window:

- Task Name:** Sony Digital - Mobile App and Website
- Description:** Prepare the concept, the detailed plan is required. Present before the deadline to discuss and...
- Due Date:** 10/26/2020
- Labels:** Needs discussion, Partnership, Test Mode
- Assigned To:** Maria Kosareva

The screenshot shows the 'Boards' interface. A task card for 'SALES&MARKETING DEMO ITEM #3' is highlighted. A red box highlights the copy icon on the task card, with a tooltip that says 'Copy this task link to clipboard'. The task details are shown in a modal window:

- Task Name:** SALES&MARKETING DEMO ITEM #3
- Task Status:** In Progress
- Assigned To:** Maria Kosareva
- Labels:** Needs discussion, Partnership, Test Mode
- Priority:** (1) High

Add Task

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

The screenshot shows a Kanban board with three columns: 'Not Started', 'In Progress', and 'Waiting on someone else'. A red box highlights the 'Add task' button at the top of the board. The board contains several task cards:

- Not Started:** Ford Motor - In-dash UI (Priority: (1) High, % Complete: 0%, Due Date: 10/2/2020)
- In Progress:** Sony Digital - Mobile App and Website (Priority: (1) High, % Complete: 80%, Due Date: 10/26/2020)
- Waiting on someone else:** Exxon Mobile - Internal communications app (Priority: (2) Normal, % Complete: 50%, Due Date: 8/31/2020)

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

The screenshot shows a Kanban board titled "MK Demo Multiple Lists". At the top, there is a "Back to site" button and a "Boards" icon. Below the title, there are icons for editing, copying, and filtering, followed by an "Add task" button. A dropdown menu is open, showing two options: "MK Demo Multiple" (assigned to "Virtoway Team") and "Sales&Marketing" (assigned to "Virtoway Team"). The board itself has a "default lane" with a "Not Started" swimlane. Two task cards are visible: "JPMorgan Chase - Financial Dashboard" (due 8/26/2020) and "Medicare - Platform for better handling patients" (due 8/14/2020, assigned to Maria).

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

The screenshot shows a Kanban board titled "AF Department" with a "Not Started" swimlane. A red box highlights a plus sign (+) in the top right corner of the swimlane header. Below the header, a task card is visible: "Ford Motor - In-dash UI" (priority: High, 0% complete, due 10/2/2020).

Hide/Collapse Swimlanes

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

The screenshot shows a Kanban board titled "MK Demo Board (Marketing)". At the top, there is an "Add task" button and a red box highlighting an eye icon with a slash through it, representing the "Hide empty swimlanes" button. The board has two swimlanes: "Not Started" (containing "Ford Motor - In-dash UI") and "In Progress" (containing "Sony Digital - Mobile App and Website" with 80% completion).

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

← Back to site Boards

Demonstration 📄 🔍 🔄 📌 View by: Project Add task

Collapse all swimlanes

🏠 AF Department

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.

← Back to site Boards

Marketing Demo 📄 🔍 🔄 📌 View by: Project Add task

🏠 Blog Posts

Not Started +

Backlink Outreach for Existing Posts
Priority: (2) Normal 🕒 Not set

New Blog Post: How to Market Effectively on a Budget
Priority: (2) Normal 🕒 Not set

2

Project ▼

- Predecessors
- Priority
- Assigned To
- Parent ID
- Area
- labels:Choice
- Labels

Introduction Video to Onboard Users
Priority: (2) Normal 🕒 Not set

2 / 5

Waiting on someone else +

New video on demo
Priority: (2) Normal 🕒 Not set

1 / 5

🏠 Facebook & Video

Not Started +

New Blog Post: New Approach
Priority: (2) Normal 🕒 Not set

In Progress +

Check Activity
Priority: (2) Normal 🕒 Not set

Waiting on someone else +

Welcome Video for Best Product
Priority: (2) Normal 🕒 Not set

Move Task

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

The screenshot displays a task management interface with two main columns: "In Progress" and "Waiting on someone else".

- In Progress Column:**
 - Sony Digital - Mobile App and Website:** Priority: (1) High, % Complete: 80%, Due: 10/26/2020, 2 comments.
 - Samsung - Digital Market Place:** Priority: (2) Normal, % Complete: 100%, Due: 10/12/2020, 1 comment, Edit labels.
 - UnitedHealth Group - Website:** Priority: (2) Normal, % Complete: 30%, Due: Not set, 2 comments.
- Waiting on someone else Column:**
 - Exxon Mobile - Internal communications app:** Priority: (2) Normal, % Complete: 50%, Due: 8/31/2020, 1 comment.

View and Edit Task

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

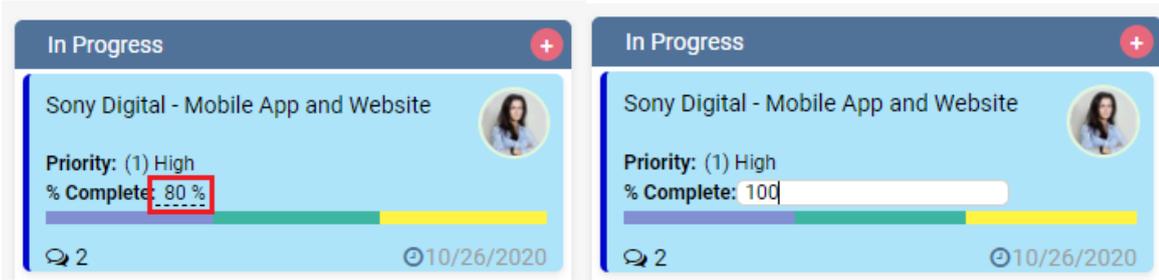
The screenshot shows the task management interface with a tooltip for the "Sony Digital - Mobile App and Website" task.

- Task Card (Left):** Priority: (1) High, % Complete: 80%, Due: 10/26/2020, 2 comments.
- Tooltip (Right):**
 - Title:** Sony Digital - Mobile App and Website
 - Description:** Prepare the concept, the detailed plan is required. P resent before the deadline to discuss and...
 - Due Date:** 10/26/2020
 - Labels:** Needs discussion, Partnership, Test Mode
 - Assignee:** Maria Kosareva
 - Actions:** Edit, ...

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.

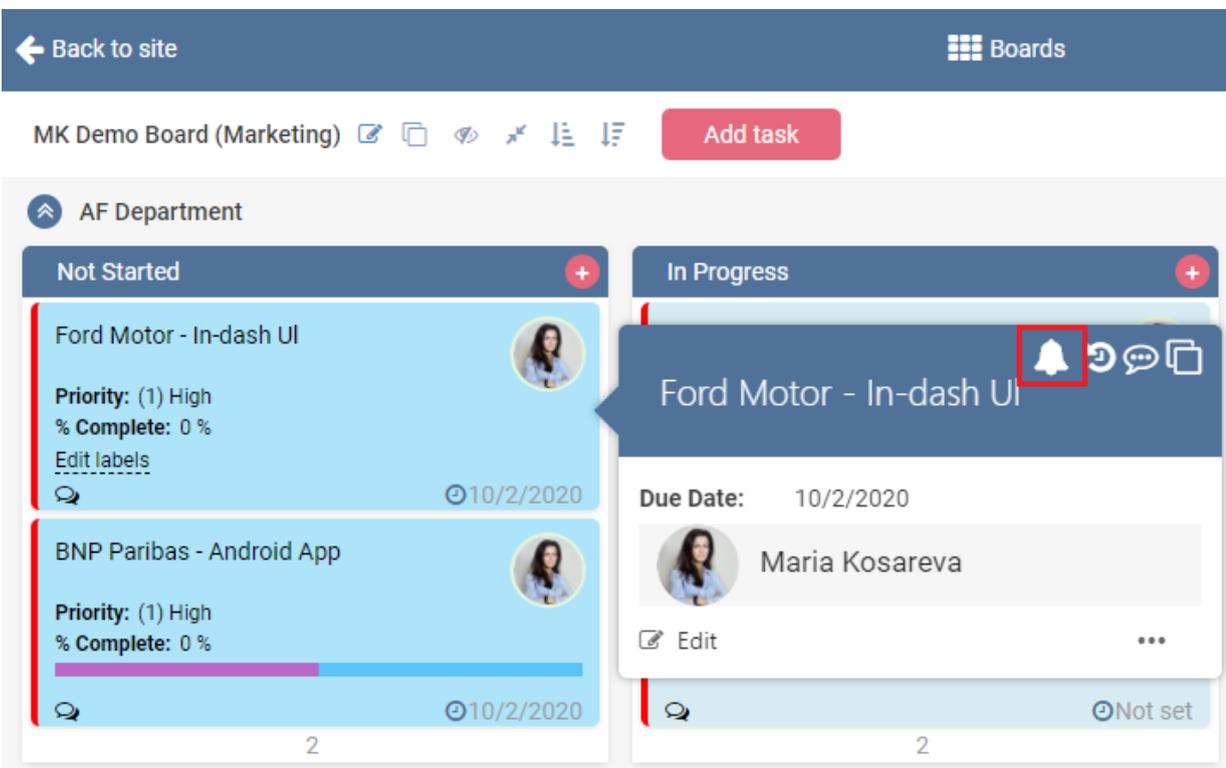
Note: by the way, if you change the percentage complete to 100, the task will be automatically

moved to the "Completed" column.

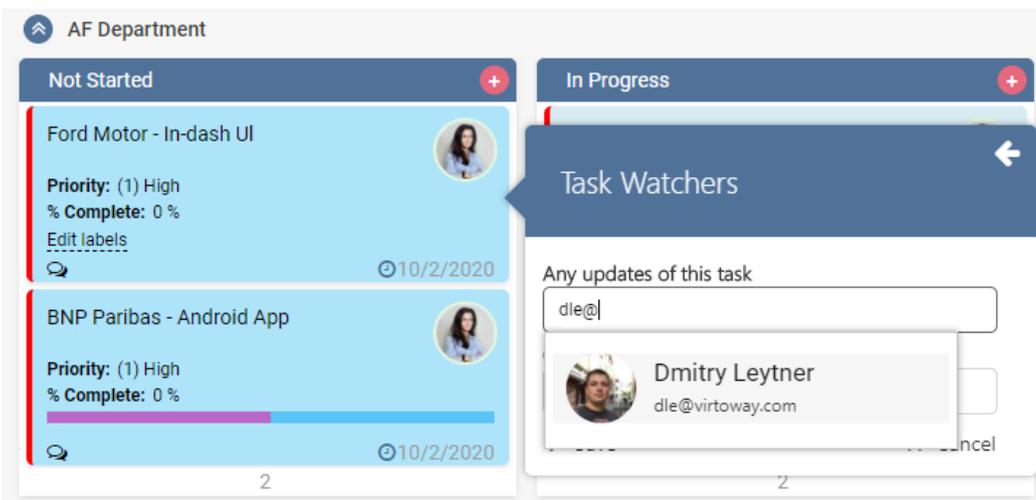


Task Watchers

Click on bell icon in the right upper corner of 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 screenshot shows a Kanban board for the 'AF Department'. There are two columns: 'Not Started' and 'In Progress'. Each column contains two task cards. The first card in the 'In Progress' column is titled 'Ford Motor - In-dash UI'. A tooltip is open over this card, displaying the task title, a due date of '10/2/2020', the user 'Maria Kosareva', and an 'Edit' button. A red box highlights the comments icon in the tooltip's header.

The comments history will appear in the tooltip as well.

This screenshot shows the same Kanban board, but the tooltip for the 'Ford Motor - In-dash UI' task is expanded to show a 'Comments' section. The section has a title 'Comments' and a back arrow. Below the title is a text input field containing 'Still working!' and a 'Send' button. A list of comments follows, each with a user profile picture, the text of the comment, and a 'new' status indicator. The comments are: 'Any changes, guys?' and 'How is it going?' by Maria Kosareva.

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.

The screenshot shows a task board with two columns: 'In Progress' and 'Waiting on someone else'. In the 'In Progress' column, there are two task cards. The top card is for 'Samsung - Digital Market Place' with a priority of (2) Normal and 50% completion. The bottom card is for 'General Motors - Instrument Panel UX & UI' with a priority of (2) Normal and 0% completion. A tooltip is open for the Samsung task, displaying its details: 'Samsung - Digital Market Place', 'Due Date: 10/12/2020', and the assignee 'Maria Kosareva'. A red box highlights the 'History' icon in the tooltip's header.

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

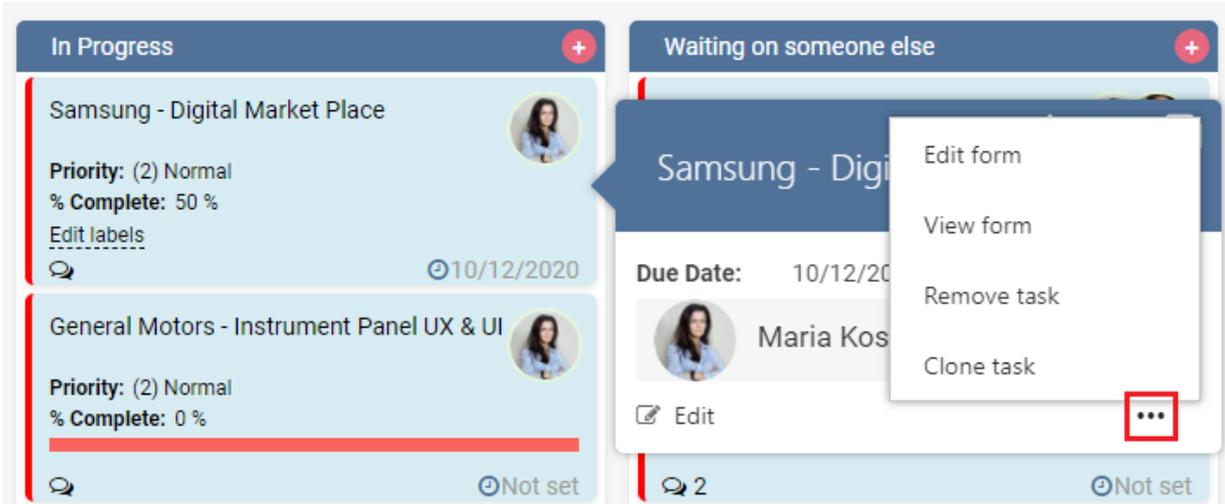
The screenshot shows the same task board as above, but with the 'History' panel open for the Samsung task. The history panel displays a table of changes:

No.	Modified	Modified By
12.0	10/23/2020 2:47:42 AM	Maria Kosareva
	Task Status In Progress	
	% Complete 50.00 %	
11.0	10/23/2020 2:29:39 AM	Maria Kosareva
	Project AF Department	
10.0	10/7/2020 9:58:53 AM	Maria Kosareva
	Project KE Department	
9.0	10/5/2020 9:40:17 AM	Maria Kosareva
	Task Status Waiting on someone else	
8.0	10/2/2020 4:31:28 AM	Maria Kosareva
	Task Status Completed	
	% Complete 100.00 %	

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

Edit/View Form and Remove/Clone Task

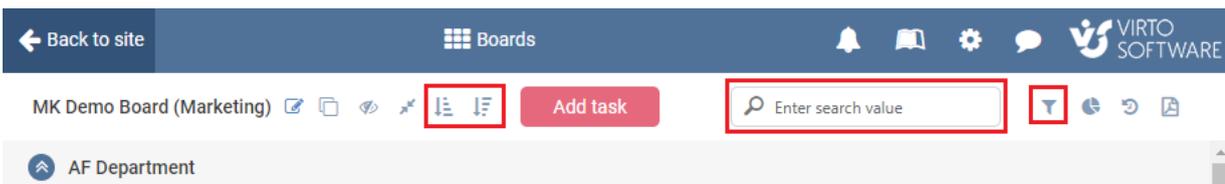
There are additional actions available when you click on dots in the tooltip: you can open edit or view form, remove task or clone it. When you clone a task, it is opened in a new task's edit form that contains all field values from the cloned task.



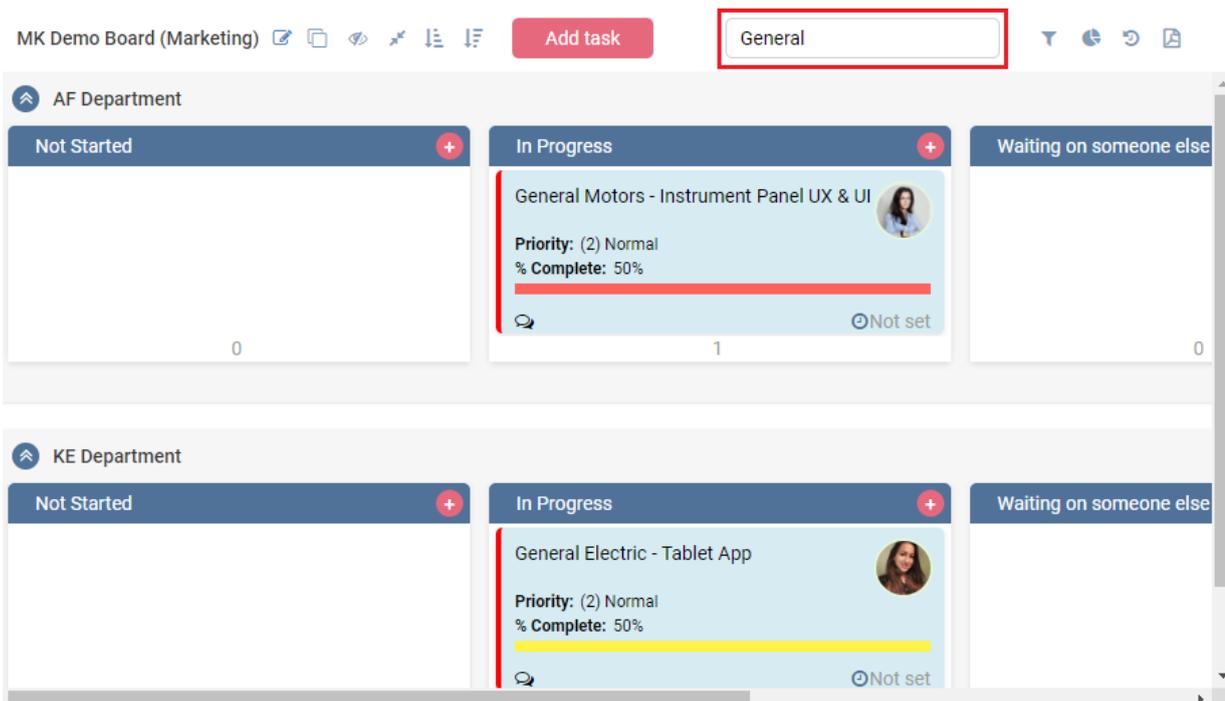
Note: Attachments and images can't be transferred to a cloned task.

Task Filters

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

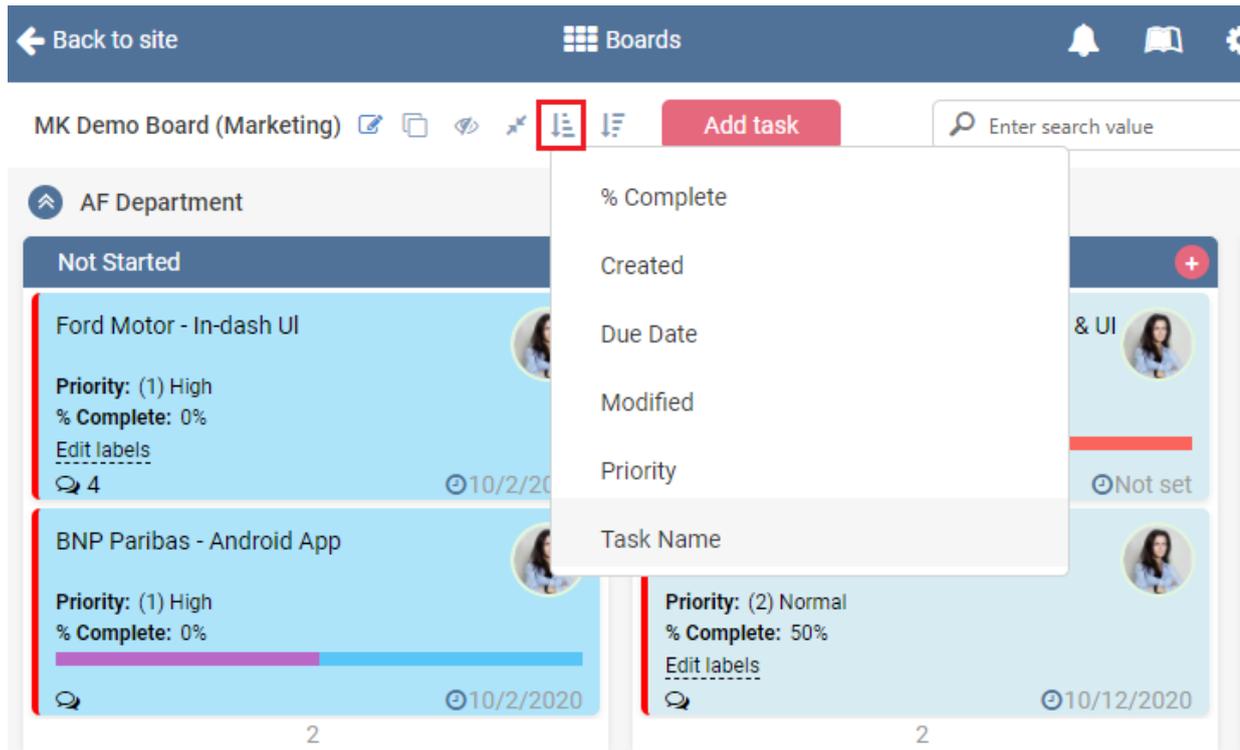


Search control allows you to show only tasks matching to any entered task values (text, numbers, and symbols) that are displayed on cards.

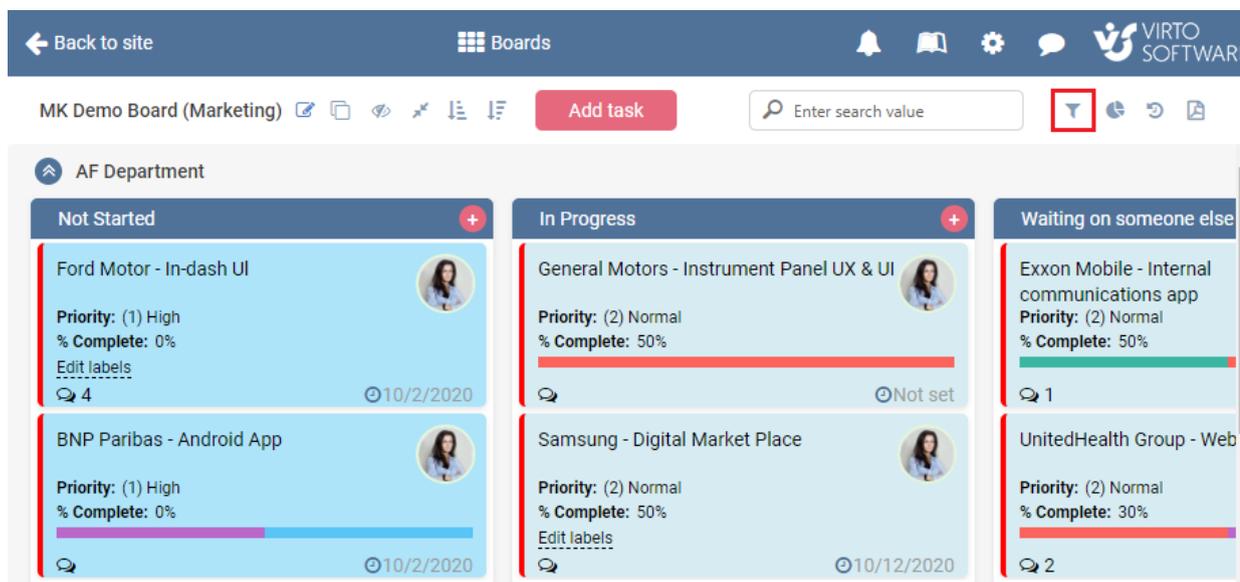


If you enable tasks sorting according to a specified field in the settings block, you may apply this

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.

The screenshot shows a Kanban board with a task card titled "Waiting on someone else". The task is "Exxon Mobile - Internal communications app" with a priority of "(2) Normal" and 50% completion. A dropdown menu is open, showing "Current views" with "My Tasks" selected, and "Members" with "Anna Timofeeva" and "Maria Kosareva" listed.

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.

Filters 

High priority

Members

Anna Timofeeva
Maria Kosareva

Define the filter parameters according to your needs.

The "Filter" dialog box shows the following configuration:
 Name: To Discuss
 is enable by default
 is available for everyone
 Conditions: Labels is equal to Needs duscussion
 +AND
 OR
 Add Conditions Set
 Save Cancel

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

Filters ✕

High priority



To Discuss



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

The screenshot shows a Kanban board interface for 'MK Demo Board (Marketing)'. At the top, there is a search bar with 'Enter search value' and a 'To Discuss' filter button highlighted with a red box. Below the search bar, the board is organized into two departmental sections: 'AF Department' and 'KE Department'. Each department has four columns: 'Not Started', 'In Progress', 'Waiting on someone else', and 'Completed'. In the 'AF Department', the 'In Progress' column contains a task card for 'Sony Digital - Mobile App and Website' with a priority of (1) High and 80% completion. In the 'KE Department', the 'In Progress' column contains a task card for 'Fannie Mae - Mobile App' with a priority of (2) Normal and 49% completion, and the 'Waiting on someone else' column contains a task card for 'Cardinal Health - Promo Landing' with a priority of (3) Low and 0% completion.

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

This image shows a close-up of the top navigation area. It includes a search bar with 'Enter search value', a 'To Discuss ✕' filter indicator, and a 'Clear filters' button highlighted with a red box. Below this, the 'Waiting on someone else' and 'Completed' columns of the Kanban board are visible.

Add more filters with “+” button.

This image shows the 'Filters' section of the interface. It lists 'High priority' and 'To Discuss' filters, each with edit and delete icons. A red box highlights the '+' button at the bottom left, indicating where to click to add a new filter.

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.

Name *

To Discuss

is enable by default

is available for everyone

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.

 Apply

Current views

Demo Tasks

Wait

Meets team

Public Lists

Demo Tasks ✓

Public Tasks

Filters 

 My tasks in October ✓

 d

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

Current views

Sales&Marketing Demo

Filters 

High priority  

To Discuss  



Members

 Anna Timofeeva

 Maria Kosareva

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.

Additional

Show/Hide “Add new task” button

Custom button text

Allow fast task creation from a column

Allow editing directly on card

Disable drag & drop

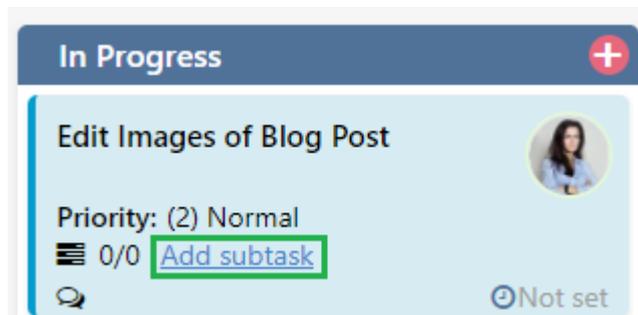
Enable Subtask/Checklist

Allow multi level

[Save](#)

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.

MARKETING ITEM #4 ✕

Edit Images of Blog Post

Details | Subtasks | Comments

Task Name	Task Status	Due Date
-----------	-------------	----------

Now fill in the form and save the subtask.

NEW TASK
✕

Subtask of Edit Images of Blog Post

Full view 🔊

Task Status
 Not Started ▼

Assigned To

Maria Kosareva
✕

Priority
 (2) Normal ▼

Description

Paragraph ▼
A ▼
🔗 ▼
B
I
U
abc
☰
☰
☰
☰
☰
☰
🔗
🖼️
🔲

Check the required extension.

Due Date
 1 Sep, 2021 📅

Save & Close
Close

The subtask appears in the list of subtasks.

MARKETING ITEM #4
📄 🔄 🔔 📁
✕

Edit Images of Blog Post

Details
Subtasks
Comments

+ Add new subtask
🔍 Task ID

Task Name	Task Status	Due Date
Subtask of Edit Images of Blog Post	Not Started ▼	1 Sep, 2021 📅 🔊
summary: 1	0/1	9/1/2021

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.

SALES&MARKETING DEMO ITEM #41    

Edit mages of Blog Post

Details Subtasks Comments

+ Add new subtask Add existing task Chevron
Chevron - Internal com...

Task Name	Task Status	Due D
Subtask of Edit mages of Blog Post 	Completed 	 
Subtask of Edit mages of Blog Post 2 	Not Started 	 
summary: 2	1/2	

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".



Verizon Communications - In store

Prepare the roadmap 

% Complete: 50%

Assigned To: Maria Kosareva

Labels:

ID: 44

[Edit labels](#)

  Not set

6

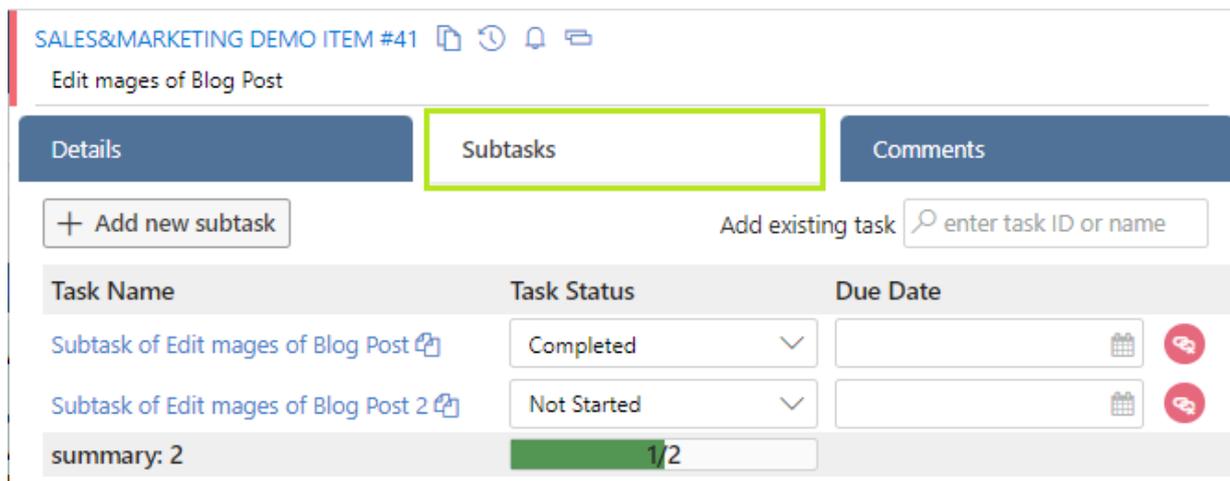
Subtask Counter

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

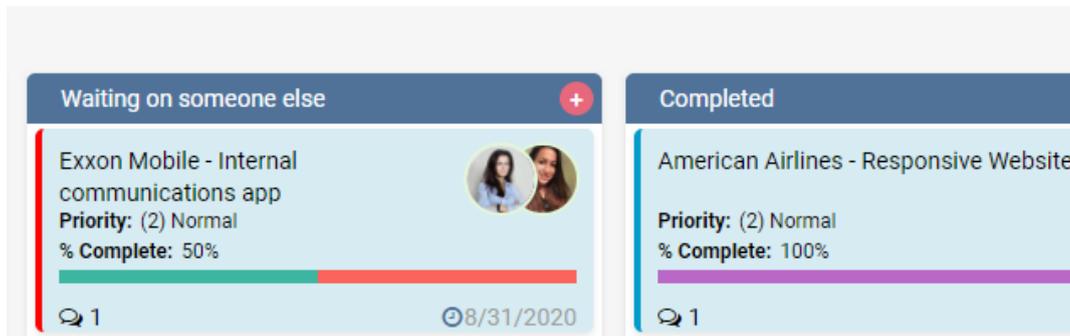
You can edit subtasks directly in the card of its parent task. Just switch to the “Subtasks” tab, make the required changes and save them.



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

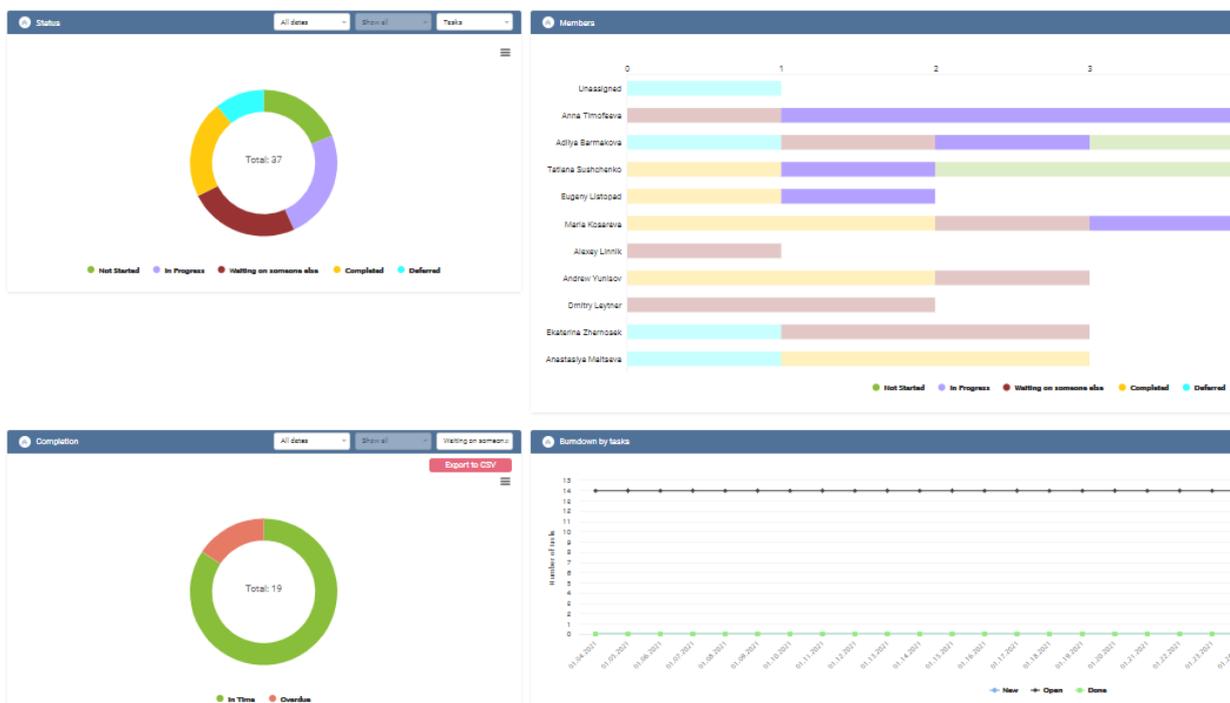
Charts

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”.

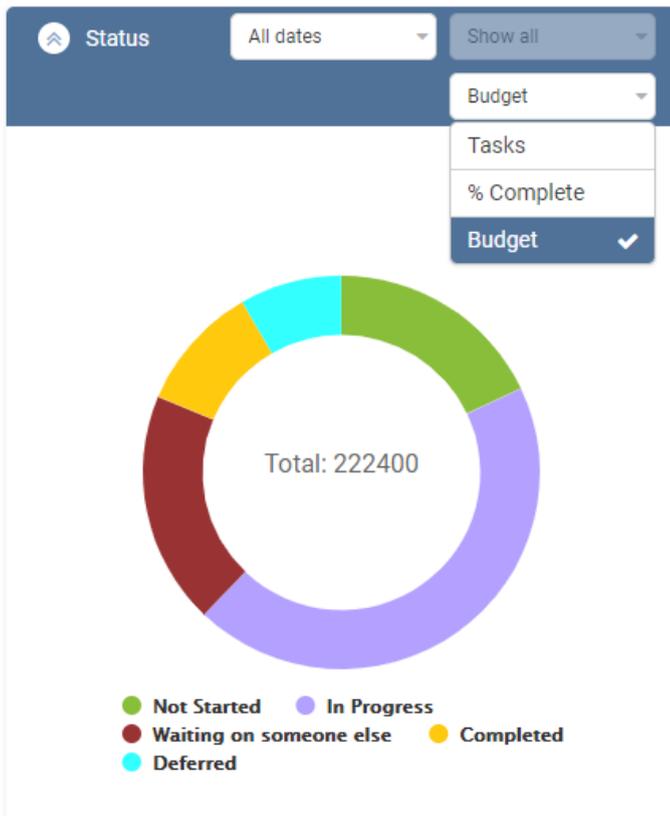
Marketing campaigns



Define the required parameters for your analysis.

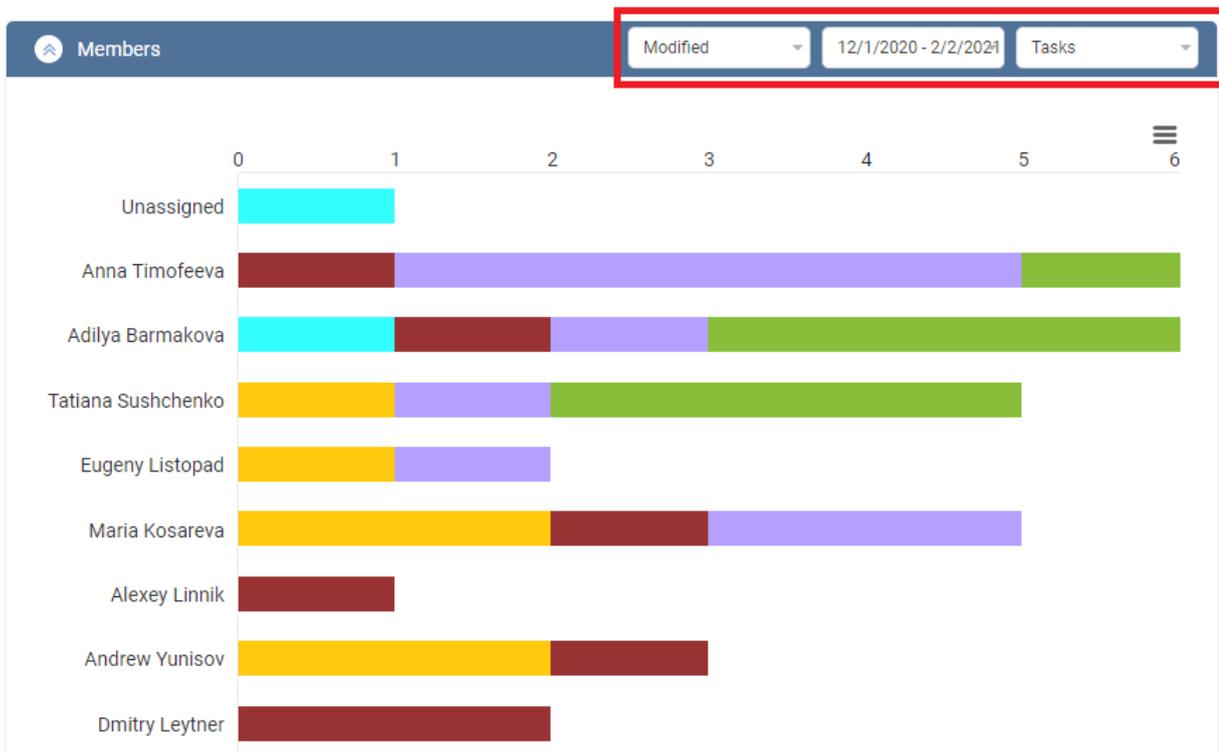
1) Status

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.



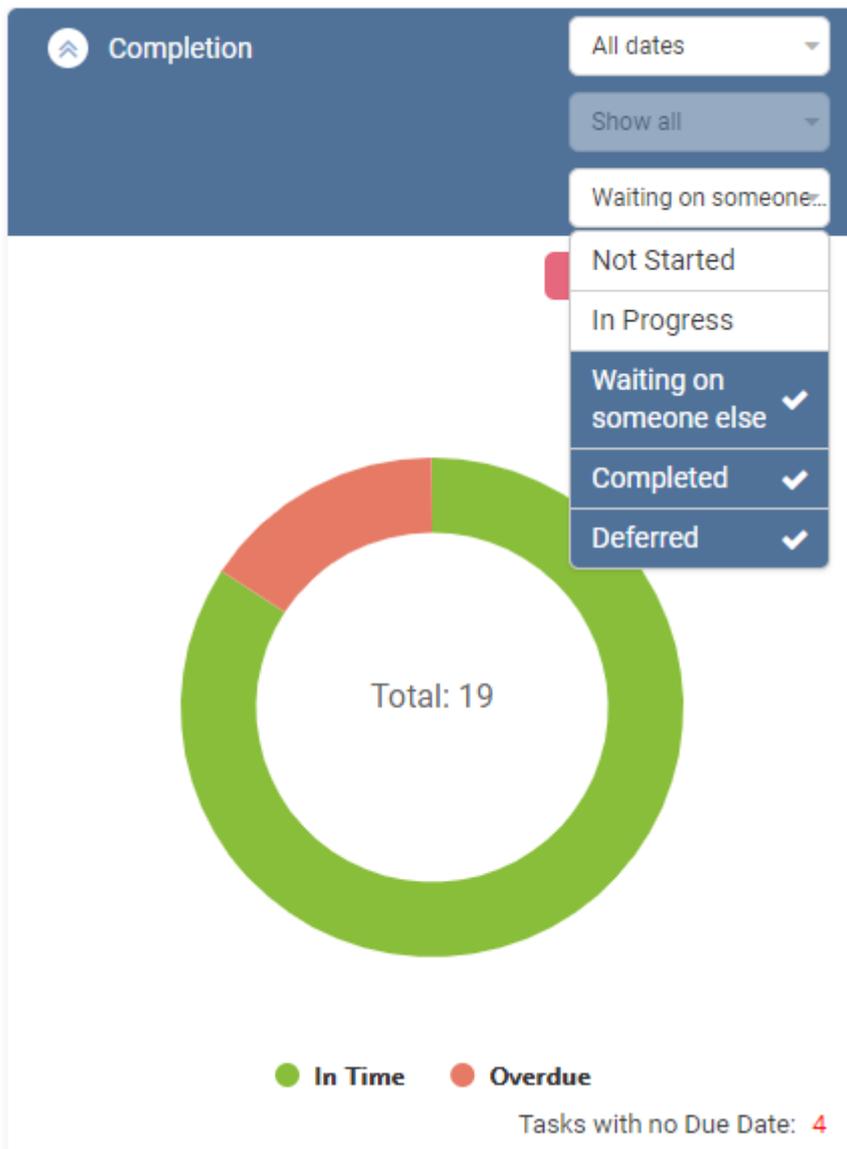
2) Members

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.

Completion All dates

Show all

Waiting on someone...

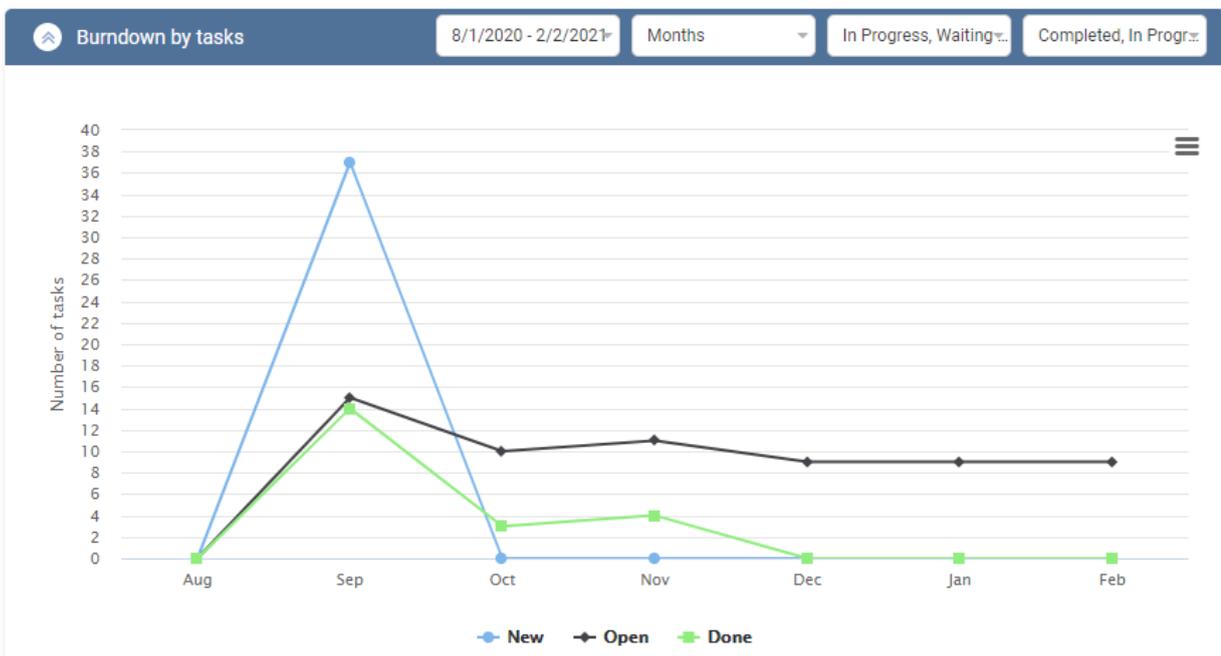
Export to CSV

Marketing campaigns.csv

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.

Charts - specify charts to display on charts page

Status chart
 Members chart
 Completion chart

Burndown chart
 Lead Time chart

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.

Charts - specify charts to display on charts page

Status chart
 Members chart
 Completion chart

Burndown chart
 Lead Time chart

Available for

Users or (and) groups list with permission to view charts of the board

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.

The screenshot shows a Kanban board for 'MK Demo Board (Marketing)'. The board is divided into four columns: 'Not Started', 'In Progress', 'Waiting on someone else', and 'Completed'. Each column contains task cards with details like priority, completion percentage, and due dates. A red box highlights the board history icon in the top right corner of the board area.

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.

← Back to site Boards [Icons: Bell, Book, Gear, Chat, Virtosoftware Logo]

MK Demo Board (Marketing) [✎](#)

Last month Priority, Task Status Modified by not selected **Create** [Icons: Refresh, Grid]

Modify date	Title	Changed fields	New value	Modified By
9/30/2020 9:46:49 AM	UnitedHealth Group - Website	Task Status Project	Waiting on someone else AF Department	Maria Kosareva

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.

← Back to site Boards [Icons: Bell, Book, Gear, Chat, Virtosoftware Logo]

MK Demo Board (Marketing) [✎](#) [Icons: Copy, Paste, Print, Filter, Sort] **Add task** Enter search value [Icons: Filter, Refresh, Print]

AF Department

Not Started	In Progress	Waiting on someone else	Completed
Ford Motor - In-dash UI Priority: (1) High % Complete: 0% Edit labels 4 10/2/2020	Sony Digital - Mobile App and Website Priority: (1) High % Complete: 80% 2 10/26/2020	Exxon Mobile - Internal communications app Priority: (2) Normal % Complete: 50% 1 8/31/2020	American Airlines - Responsive Website Priority: (2) Normal % Complete: 100% 1

← → ↑ This PC > Documents > Virtosoftware

Organize New folder

- VS_NewsArticles
- OneDrive - Virtoway
- Microsoft Teams Chat Files
- Notebooks
- Вложения
- This PC
- 3D Objects
- Desktop
- Documents
- Downloads
- Music
- Pictures
- Videos
- Local Disk (C:)

Name

- Downloaded Documentation
- iCal Export Files
- MS Store
- Newsletter
- Offers&Promo
- VS Guides
- VS Video
- VS_NewsArticles
- whp-hide-posts.0.5.3

File name: MK Demo Board (Marketing).pdf

Save as type: Adobe Acrobat Document (*.pdf)

Managing your Kanban Boards

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

← Back to site **Boards** [notification] [bookmarks] [settings] [chat] VIRTO SOFTWARE

MK Demo Board (Marketing) [edit] [copy] [share] [refresh] [list] [filter] **Add task** [search] Enter search value [filter] [refresh] [share]

AF Department

Not Started	In Progress	Waiting on someone else
Ford Motor - In-dash UI Priority: (1) High	Sony Digital - Mobile App and Website Priority: (1) High	Exxon Mobile - Internal communications app Priority: (2) Normal

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

← Back to site **Boards**

+ Create new board

Favorite Boards

Marketing	MK Demo Board (Market...	MK Demo Multiple Lists
Marketing projects	Demonstration board with pack of test tasks for screenshots and video	

All boards

_MVB Personal View of T...	_test mv lib	_test release 201007-2

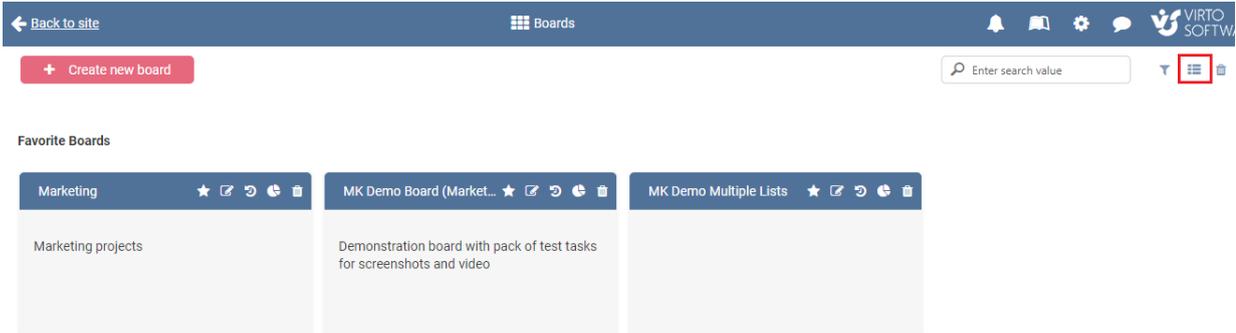
You can edit board settings from this view or go to setting right from the board view by clicking on edit icon on the right side of the board name.

Favorite Boards

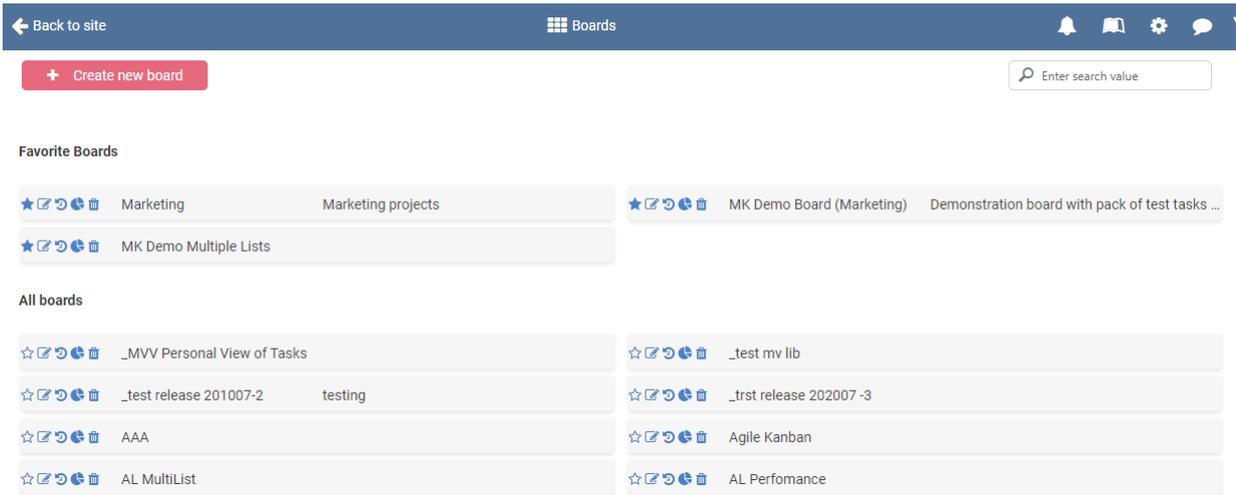
Marketing [star] [edit] [refresh] [share] [trash]

Marketing projects

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



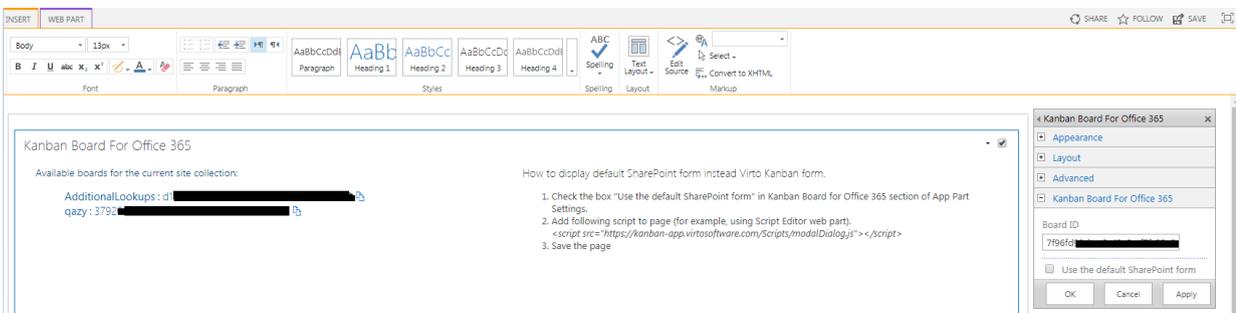
Now the boards are shown in the list view as follows.



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.

The screenshot shows the 'Kanban Board For Office 365' settings dialog box. The 'Appearance' tab is active. The 'Title' field is 'Kanban Board For Office 365'. The 'Height' section has 'No. Adjust height to fit zone.' selected. The 'Width' section has 'No. Adjust width to fit zone.' selected. The 'Chrome State' is 'Normal'. The 'Chrome Type' is 'Default'. The 'Layout' and 'Advanced' tabs are collapsed. The 'Kanban Board For Office 365' section is expanded, showing the 'Board ID' field with the value 'e27c134a-c9ee-4e64-9521-3ec'. The checkbox 'Use the default SharePoint form' is checked and highlighted with a yellow circle. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

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

The screenshot shows the SharePoint interface with the Script Editor, Kanban Board web part, and the Kanban Board configuration pane. The script editor contains a script snippet for the Kanban Board web part. The configuration pane shows the appearance settings for the Kanban Board web part.

Script Editor

EDIT SNIPPET

Kanban Board

Available boards for the current site collection:

Type to filter

- _MVV Personal View of Tasks
- a16ebfd8-f75f-4bf5-a839-2ac7fe52ce36
- _test mv lib
- 92eb72e4-77c7-48d4-a8b4-aa9e143cf63e
- _test release 201007-2
- cd758860-837e-40f0-ac5f-28064a51d0b6
- _trst release 202007 -3
- da31a243-f02a-42b8-9c6b-1902d9a0b955

How to display default SharePoint form instead Virto Kanban form.

1. Check the box "Use the default SharePoint form" in Kanban Board for Office 365 section of App Part Settings.
2. Add following script to page (for example, using Script Editor web part).
3. Save the page

```
<script src="https://kanban-app.virtosoftware.com/Scripts/spmodal.js">
</script>
```

Kanban Board

Appearance

Title

Kanban Board

Height

Should the Web Part have a fixed height?

Yes 600 Pixels

No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

Yes Pixels

No. Adjust width to fit zone.

Chrome State

Minimized

Normal

Chrome Type

Default

Layout

Advanced

Kanban Board For Office 365

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

The screenshot shows the SharePoint interface with the Script Editor, Kanban Board web part, and the Kanban Board configuration pane. An 'Embed' dialog box is open, showing the script snippet being pasted into the 'Paste some script or embed code below' field.

Script Editor

EDIT SNIPPET

Kanban Board

Available boards for the current site collection:

Type to filter

- _MVV Personal View of Tasks
- a16ebfd8-f75f-4bf5-a839-2ac7fe52ce36
- _test mv lib
- 92eb72e4-77c7-48d4-a8b4-aa9e143cf63e
- _test release 201007-2
- cd758860-837e-40f0-ac5f-28064a51d0b6
- _trst release 202007 -3
- da31a243-f02a-42b8-9c6b-1902d9a0b955

How to display default SharePoint form instead Virto Kanban form.

1. Check the box "Use the default SharePoint form" in Kanban Board for Office 365 section of App Part Settings.
2. Add following script to page (for example, using Script Editor web part).
3. Save the page

```
<script src="https://kanban-app.virtosoftware.com/Scripts/spmodal.js">
</script>
```

Kanban Board

Appearance

Title

Kanban Board

Height

Should the Web Part have a fixed height?

Yes 600 Pixels

No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

Yes Pixels

No. Adjust width to fit zone.

Chrome State

Minimized

Normal

Chrome Type

Default

Embed

Paste some script or embed code below.

```
<script src="https://kanban-app.virtosoftware.com/Scripts/spmodal.js"> </script>
```

Insert **Cancel**

Using Virto Kanban Board on Modern SharePoint site

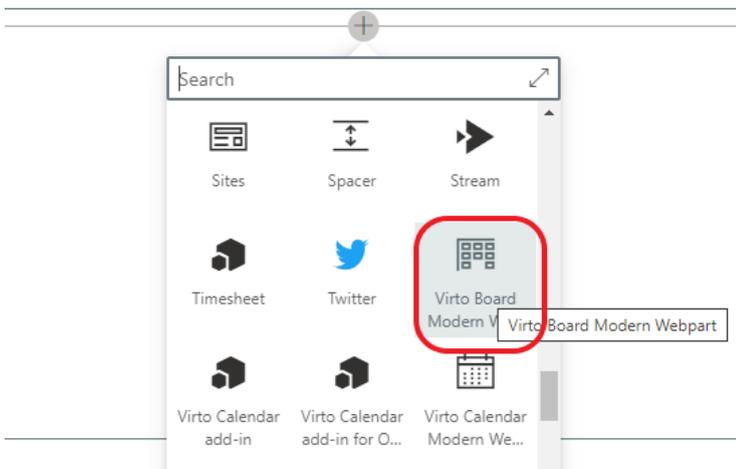
Virto Kanban Board online supports the modern SharePoint interface. You can use the Kanban online application on the **SharePoint modern sites** as well. In other words, the users of modern sites have a great opportunity of working with full Virto Kanban functionality.

To start using please follow the steps below.

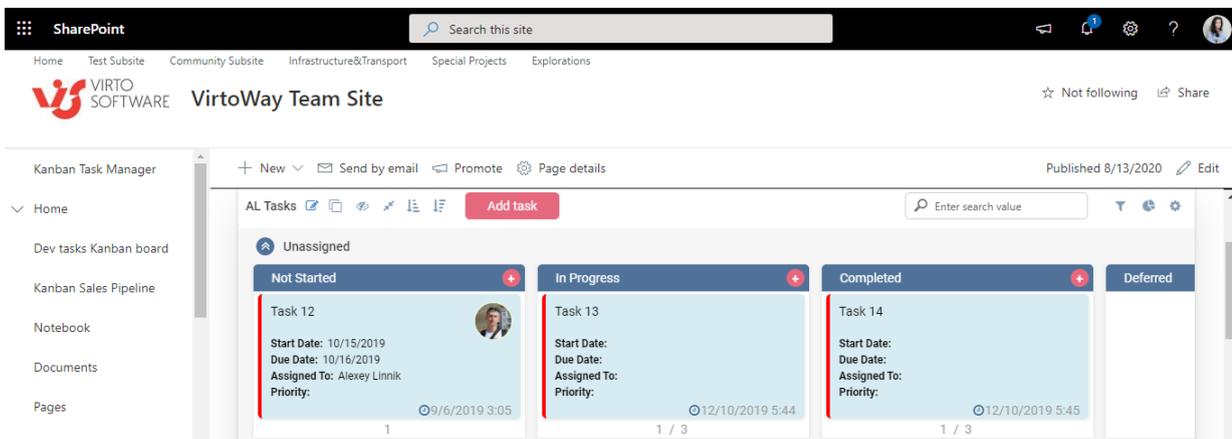
Step 1. Install the Kanban Board app to the SharePoint site or make sure it's already installed.

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

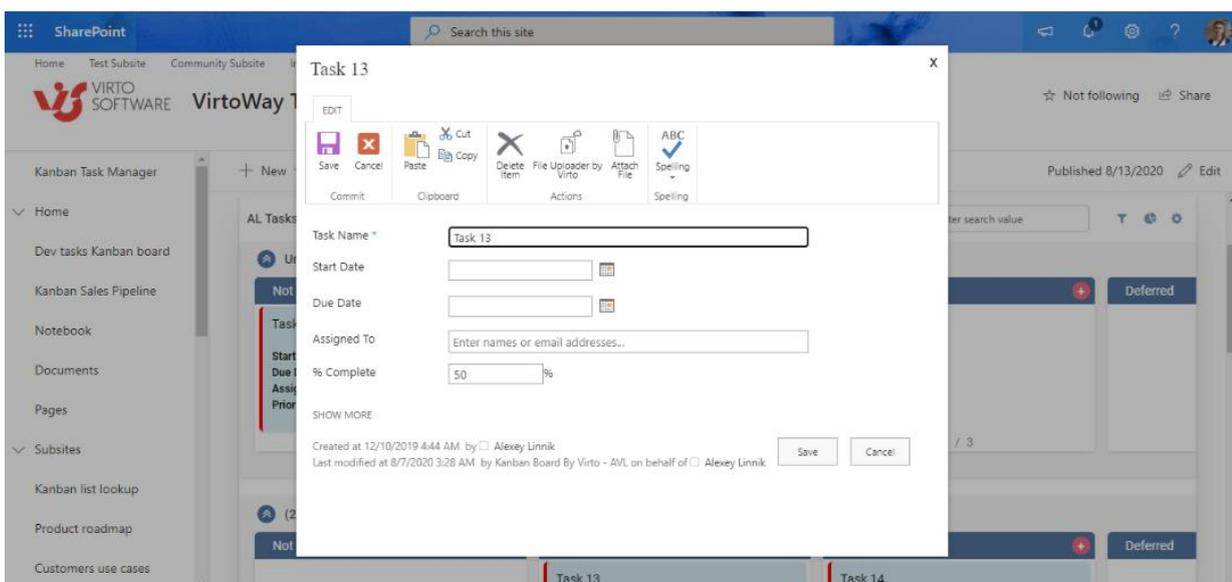
Step 3. And finally, add the “Virto Board Modern Web Part” to your SharePoint site page.



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



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



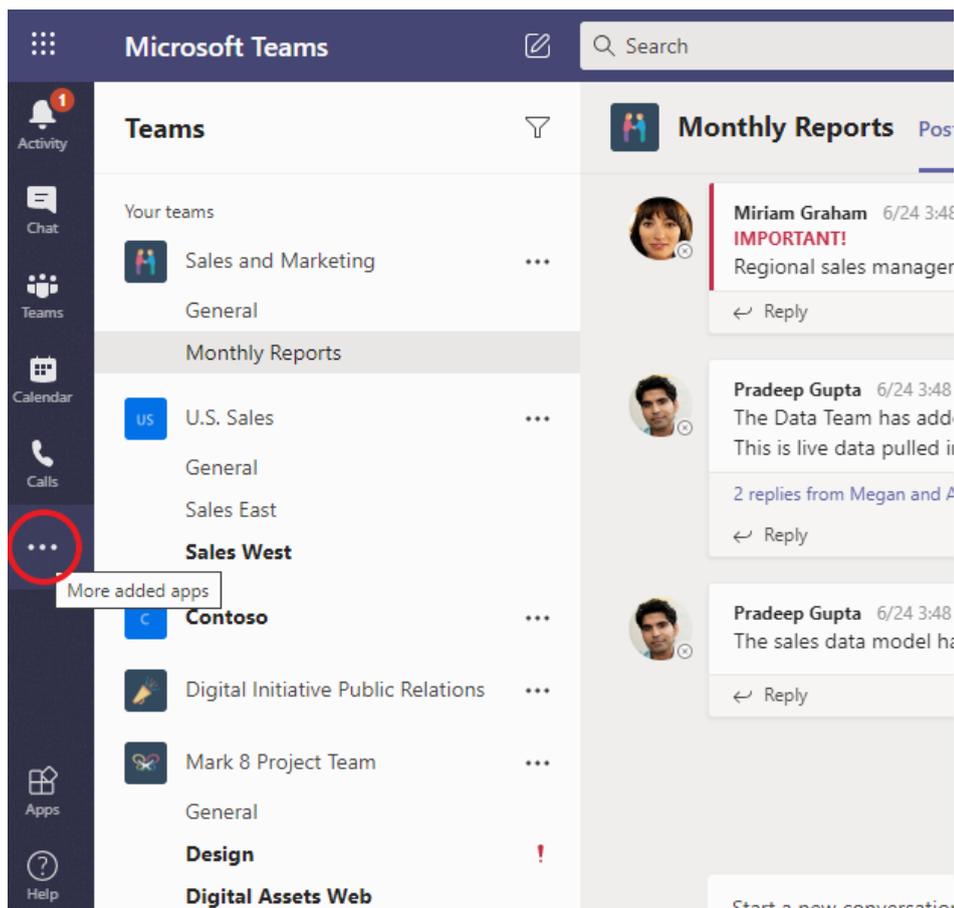
Working with Virto Office 365 Kanban Board in Microsoft Teams

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.

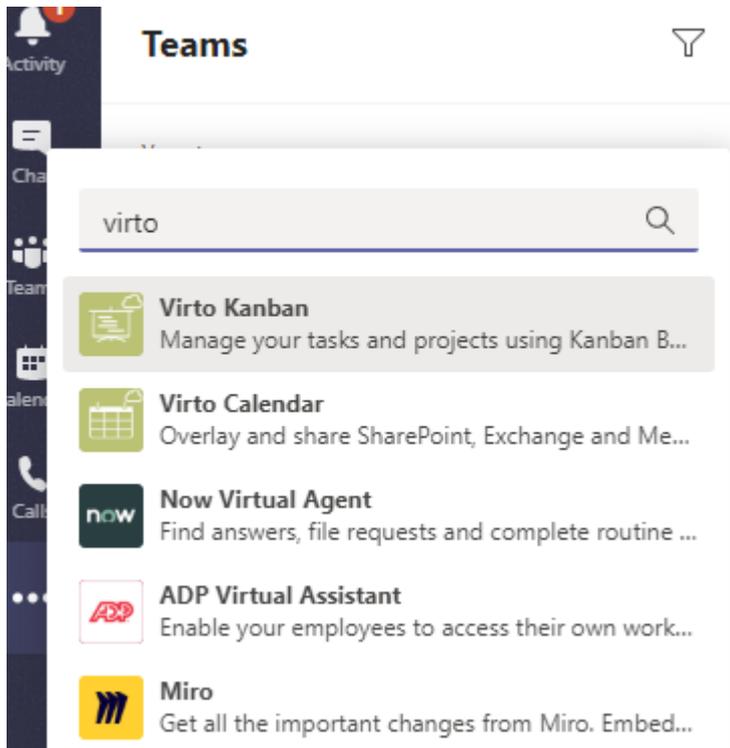
You can create and manage tasks as usual in Teams and set up board settings in SharePoint. The Kanban board customization is available in SharePoint environment only. In Teams, you can display and manage board's tasks without access to Kanban Settings.

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”.



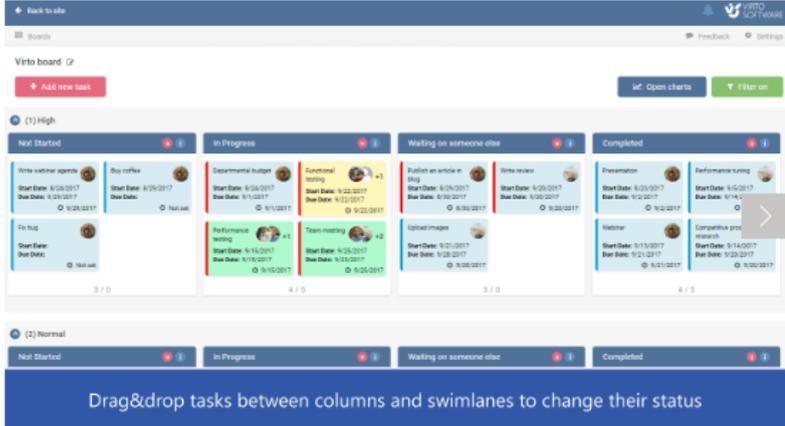
Virto Kanban
Project management, Productivity, Workflow + business management

Add to a team

About

More from Virtosoftware

Permissions



Manage your tasks and projects using Kanban Board view

Virto Kanban Board for teams is a convenient scrum board to visualize and manage tasks in SharePoint. The component displays any SharePoint task list as a Kanban/Scrum Board, where Kanban cards are divided into the columns usually depending on the

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



Select a channel to start using Virto Kanban

Virto Kanban will be available for the entire team, but you can start using it in the channel you choose.

Type a team or channel name

Sales and Marketing > General



< Back

Set up a tab

Open the channel where you've decided to add the created Kanban board, and click "Add a tab".

The screenshot shows the Microsoft Teams interface. On the left, the 'Teams' list includes 'Sales and Marketing'. The main area shows the 'General' channel with a search bar and a list of messages. A red circle highlights the '+' icon next to the channel name, with a tooltip that says 'Add a tab'. The messages include announcements from the MOD Administrator and a discussion about a conference next month.

Select the board to add.



Welcome to Virto Kanban Board!
Please configure your board before use.

Select the board you would like to see *

My Virto Kanban Board

Post to the channel about this tab

Back

Save

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.

The screenshot shows the Microsoft Teams interface. On the left, the 'Teams' sidebar is visible with various team channels. The main area shows a channel named 'General' with a sub-tab for 'Board: My Virto Kanban...'. The board itself is displayed with three columns: 'Not Started', 'In Progress', and 'Waiting on someone else'. A task card is visible in the 'Not Started' column with the title 'Welcome To Virto Kanban Board', a priority of '(2) Normal', and a status of 'Not set'. The board also includes an 'Add task' button and a search bar.

Dark Theme Mode (Coming soon)

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

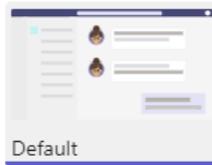
Settings



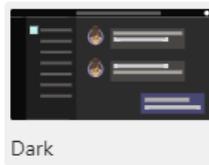
General

- Accounts
- Privacy
- Notifications
- Devices
- App permissions
- Captions and transcripts
- Files
- Calls

Theme



Default

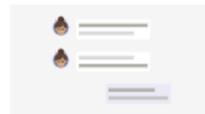


Dark

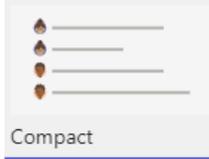


High contrast

Chat density



Comfy



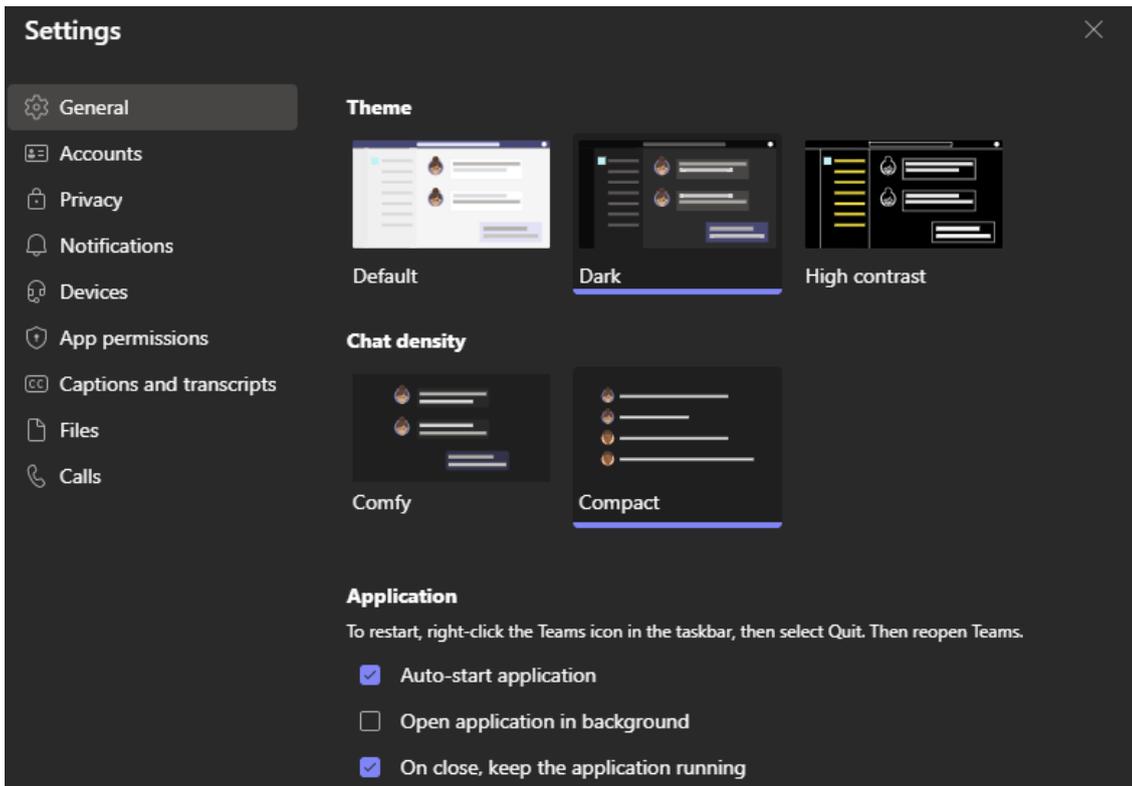
Compact

Application

To restart, right-click the Teams icon in the taskbar, then select Quit. Then reopen Teams.

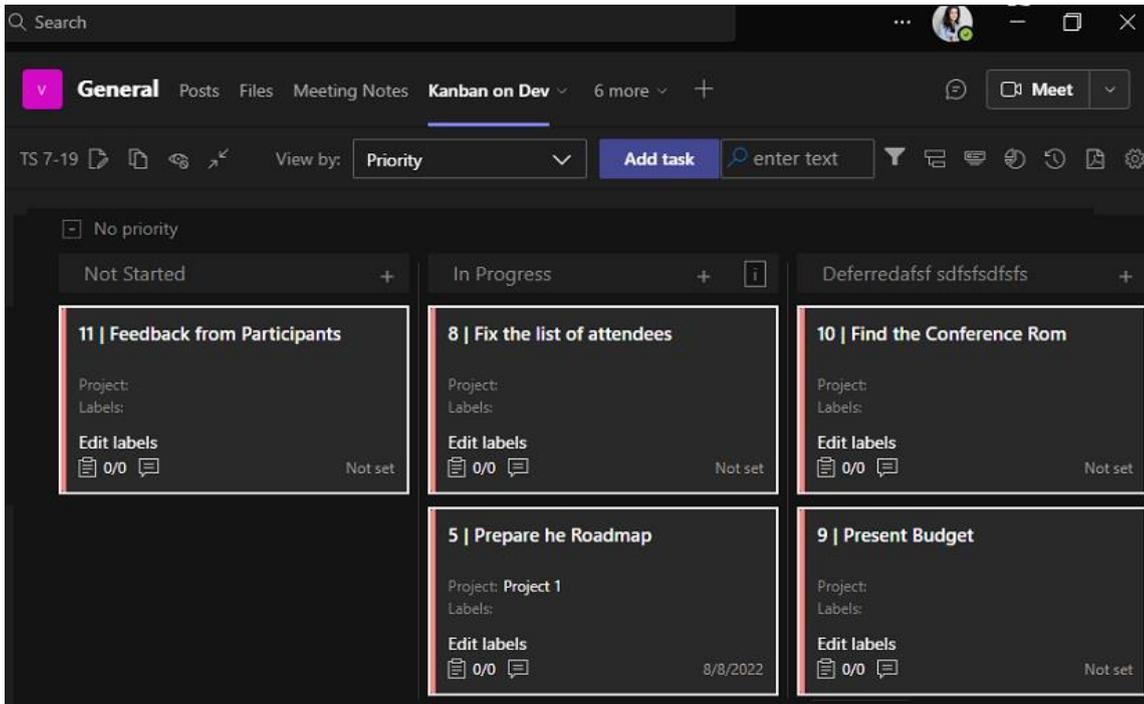
- Auto-start application
- Open application in background
- On close, keep the application running

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.

