



# **Kanban Board App for Office 365 and Teams**

## **User Permissions Guide**

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# 1 What are Kanban User Permissions for?

Customizing user permissions in Kanban makes it possible to define access to information for Kanban users, groups of users, departments, or divisions. By defining the permissions, you can set who can see the information and who does not.

It is also possible to create **per-board permissions** and define **default user permissions** for your tenant or your specific board. Default permissions define the board permissions of a user with a license if his permissions were not configured on the individual level.

User permissions can provide access for the actions as follows:

- viewing the information,
- editing information,
- ability to manage settings.

To understand the logic of Virto Kanban permission please keep in mind that the Kanban board visualizes the information that is stored in your SharePoint list. To perform the edit action on the board, the user must have permission to edit the SharePoint list item and save it.


Though Virto Kanban permissions cannot exceed or override SharePoint user permissions, it can give you an unprecedented flexibility and enable you to bring new essential scenarios to life.

There are 3 roles in the Virto Kanban Board App:

- [License Manager](#);
- [Board admin](#);
- [A user with default or defined board permissions](#).

## 2 License Management

### License Center

You can manage licenses in the **License Center** block of settings. To open it, click gear icon  in the right upper corner and choose the “License Center” tab.

Boards

License center

Admin panel

Edition: Standard Edition  
 Status: Valid  
 Domain: virto365.sharepoint.com  
 Licensed users limit: 14 / 100 assigned  
 Expires on: 30 June 2021  
 Payment duration: Yearly

**Subscribe to Virto ONE Cloud and save up to 77% of separate apps price**

- 100 + users across my company will use Virto Apps (minimum purchase for Virto One Cloud is 50 users)

Kanban Board	V1 Standard	V1 PRO	V1 Ultimate
\$1.08 user/mo	\$1.58 user/mo	\$2.46 user/mo	\$2.92 user/mo
Downgrade now	Your plan	Upgrade now	Upgrade now
Agile Task Management for SharePoint Online	You save \$1 578 Best for companies that need to increase general productivity in Office 365	You save \$3 726 Best for companies that need to increase general productivity and project management in Office 365	You save \$6 993 Best for companies that need to get maximum flexibility in Office 365

In the “License Center” block you can:

1. check the license status,
2. manage the subscription (renew or upgrade it),
3. add or delete license to the users,
4. add or delete individual license admins or SharePoint groups.

Assigning a license does not imply you assign a user permissions to the boards. A user can have a license and may not have access to the board, if you set it that way via the [Admin panel](#).

## Users with License

The whole list of users with given licenses is displayed in the “Users with a license” list.

You can add SharePoint user Groups in this field. Upon addition, you will see the list of users, not a group name. You can insert numerous SharePoint Groups here; the user will only be added once.

So, do not be afraid of duplicates.

**Users with a license**

Today 60d **6m+**  
Last login time

Add and delete users and groups

a.v.linnik_gmail.com#ext#@virt...	Adilya Barmakova	Alexander Siniouguine
Alexey Linnik	Anna Timofeeva	Dmitry Bobrovsky
Dmitry Leytner	Eileen Dempsey	Ekaterina Zhernosek
Eugeny Listopad	Gennadiy Andrianov	Maria Kosareva
Tatiana Sushchenko	Vladimir Motorin	Enter a name or email address...

Type or paste users and groups, comma delimited

If you have an enterprise license, the “Users with a license” field does not appear, because there is no limit for licenses in this case.

### Last login time slider

The slider on the right highlights users of your organization who has not used the Kanban for some time. You can move the slider to change the period of time and define this way if there are inactive users and for how long they have not been using the tool.

**Users with a license**

Today 22d **6m+**  
Last login time

Add and delete users and groups

Adilya Barmakova	Alexey Linnik	Dmitry Bobrovsky
Eugeny Listopad	Gennadiy Andrianov	Tatiana Sushchenko
Vladimir Motorin	a.v.linnik_gmail.com#ext#@virt...	Alexander Siniouguine
Anna Timofeeva	Developer Virtosoftware	Dmitry Leytner
Dmitry Melnikov	Eileen Dempsey	Ekaterina Zhernosek
Larisa Remneva	Maria Kosareva	Enter a name or email address...

Type or paste users and groups, comma delimited

**Users with a license**

Today 150d **6m+**  
Last login time

Add and delete users and groups

Adilya Barmakova	Alexey Linnik	Dmitry Bobrovsky
Eugeny Listopad	Gennadiy Andrianov	Tatiana Sushchenko
Vladimir Motorin	a.v.linnik_gmail.com#ext#@virt...	Alexander Siniouguine
Anna Timofeeva	Developer Virtosoftware	Dmitry Leytner
Dmitry Melnikov	Eileen Dempsey	Ekaterina Zhernosek
Larisa Remneva	Maria Kosareva	Enter a name or email address...

Type or paste users and groups, comma delimited

You can also export the list of users into the csv format. The list will contain the name of a licensed user, e-mail, and the last login time.

## License Manager

License managers can be added/deleted in the “License managers” block on the bottom of the license center. If the field is empty, everyone has access to license management.

This is done to simplify the migration of the existing boards into the new permissions model.

**License managers**

Add and delete license managers

Dmitry Bobrovsky × Tatiana Sushchenko × Eugeny Listopad ×  
 Alexey Linnik × Adilya Barmakova × Maria Kosareva ×

Enter a name or email address...

Users and groups with permissions to assign a license and tenant admins. No admin permissions. No license assigned by default. If empty - everyone has access

Save Back to Boards

License management is available only for license managers and to the users added to the “License managers” field. Here are 4 items of license management to keep in mind:

1. **A license manager is not obliged to have a license.** The first person handling the subscription becomes a license manager. This person can add other users or SharePoint Groups as license managers as well.
2. **If the license manager field is empty, everyone has access.** The probability of this event is very low, because of the special precautions taken. If at least one license manager is added, you cannot delete him from the field. If you delete the last license manager upon saving your changes, you will be added as a license manager again. This is done to avoid the accidental deletion of all license managers.
3. **If there is at least one user added to the license manager field** and someone is trying to access the license center, he will see the message below and should request access from the license manager.

Boards

License center Admin panel

Sorry, you cannot manage licenses. Please contact a license manager from the list below


**License managers**

Add and delete license managers

Adilya Barmakova ×

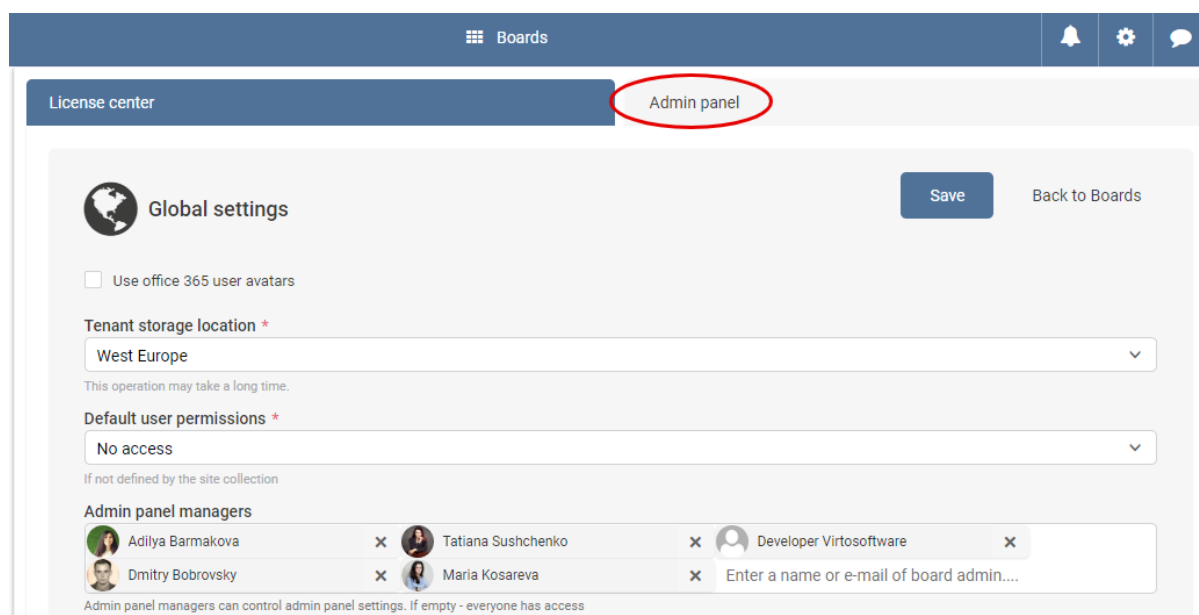
Users and groups with permissions to assign a license and tenant admins. No admin permissions. No license assigned by default. If empty - everyone has access

4. **If you are not a licensing manager,** you can find license managers in the “License managers” block of the license center (“Add and delete license managers” field).

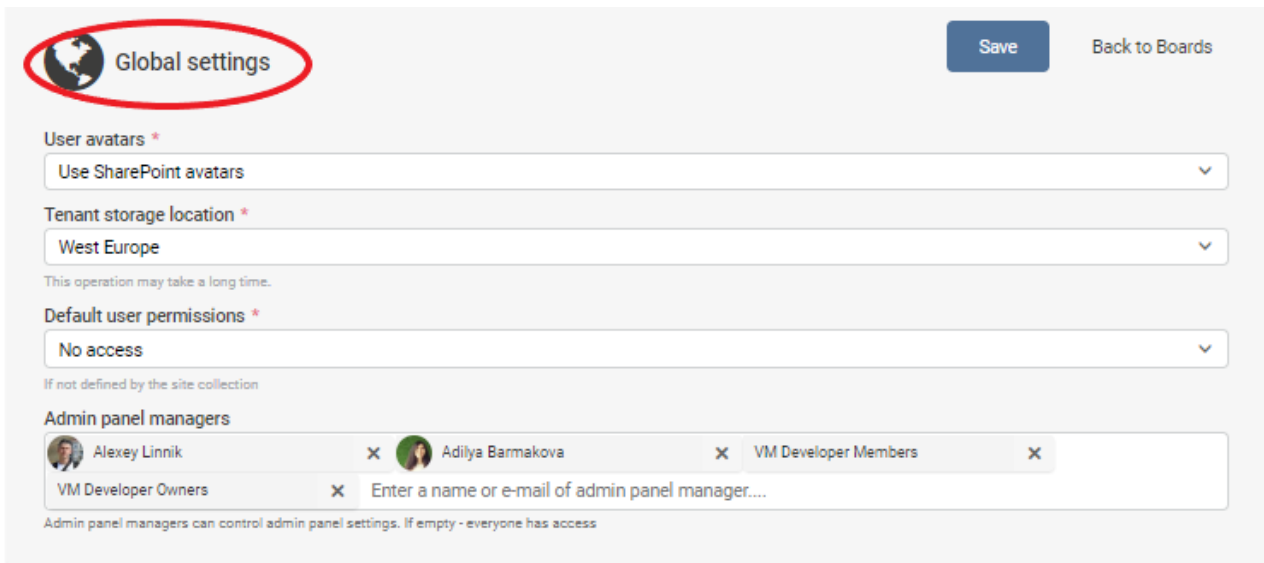
5. If you accidentally lost the license admin permissions, you can request it back from any of the current License admins. For this purpose, the gear icon  is always displayed. If you are not a license admin, you will only see the list of admins there.

### 3 Admin Panel Settings

To open permissions settings, use gear icon  in the upper right corner and open the “Admin panel” tab.



1. **For the new users/accounts** or while installing the trial version, the Admin panel menu opens for the subscription administrator. Administrator is shown in the “Admin panel managers” field.
2. **If you are the Admin in the previous version of the permissions**, you will be added as an Admin panel manager.
3. Since the new permission model is active, you are not able to delete the last Admin panel manager. The current user will be automatically added to “Admin panel managers” upon refresh.
4. The page of admin panel settings consists of two blocks: “**Global Settings**” and “**Individual board permissions**”.



**Global settings** Save Back to Boards

User avatars \*  
Use SharePoint avatars

Tenant storage location \*  
West Europe

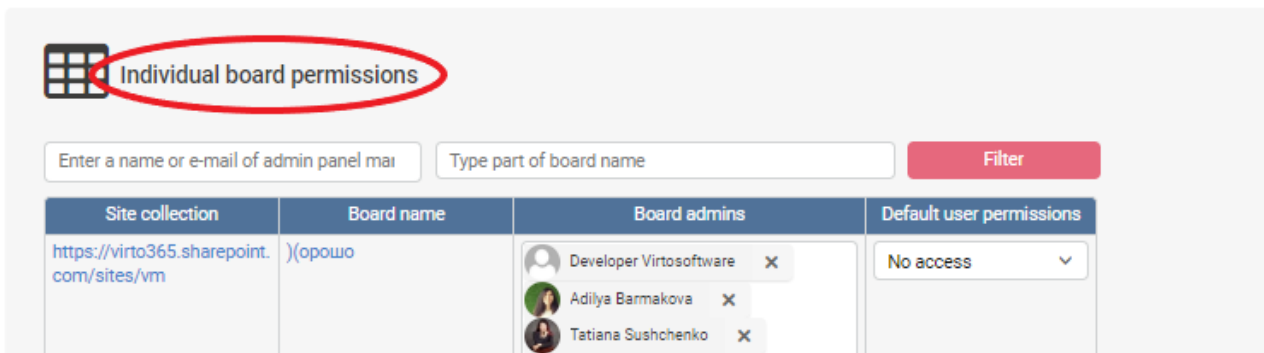
This operation may take a long time.

Default user permissions \*  
No access

If not defined by the site collection

Admin panel managers  
 Alexey Linnik x Adilya Barmakova x VM Developer Members x  
 VM Developer Owners x Enter a name or e-mail of admin panel manager...

Admin panel managers can control admin panel settings. If empty - everyone has access

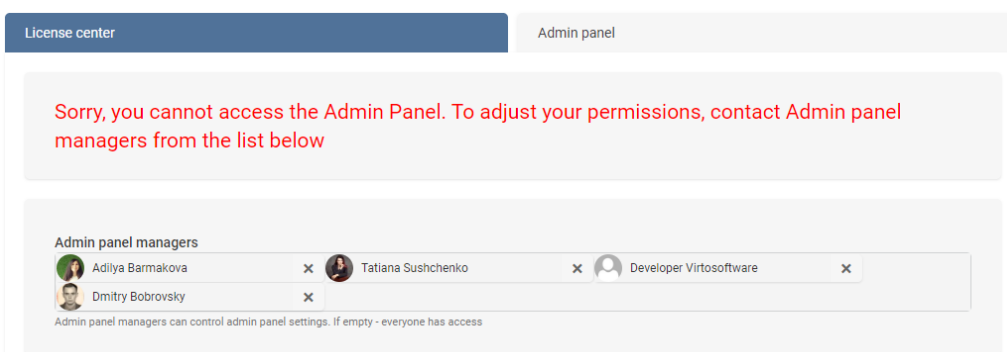


**Individual board permissions**

Enter a name or e-mail of admin panel manager  Type part of board name  Filter

Site collection	Board name	Board admins	Default user permissions
<a href="https://virto365.sharepoint.com/sites/vm">https://virto365.sharepoint.com/sites/vm</a>	)(opowio	Developer Virtossoftware x Adilya Barmakova x Tatiana Sushchenko x	No access

5. If you are not added to the admin panel managers list, you cannot access this block of settings. If you see the notification as follows, please contact one of admin panel managers to provide you with access.




License center Admin panel

Sorry, you cannot access the Admin Panel. To adjust your permissions, contact Admin panel managers from the list below

Admin panel managers  
 Adilya Barmakova x Tatiana Sushchenko x Developer Virtossoftware x  
 Dmitry Bobrovsky x

Admin panel managers can control admin panel settings. If empty - everyone has access

In case you accidentally lost the admin panel permissions, please request it back from any of the current admin panel managers (just use the gear icon  in the right upper corner and open "Admin panel").

## Global Settings



Global settings define what kind of actions will be available for users in general (for the whole Kanban app).

“**Use Office 365 avatars**” checkbox allows using avatars from Office 365.

“**Tenant storage location**” field displays the storage location of data needed to create the board layout. Please, note that we do not store the content of the board on our side. Everything is kept on your SharePoint instance.

“**Default user permissions**” field shows permissions which are set by default. For the accounts that are currently using Virto Kanban Boards, the default permission is set to Edit to provide the compatibility. It has “No access” value while the first installation and “Edit” when the app is updated.

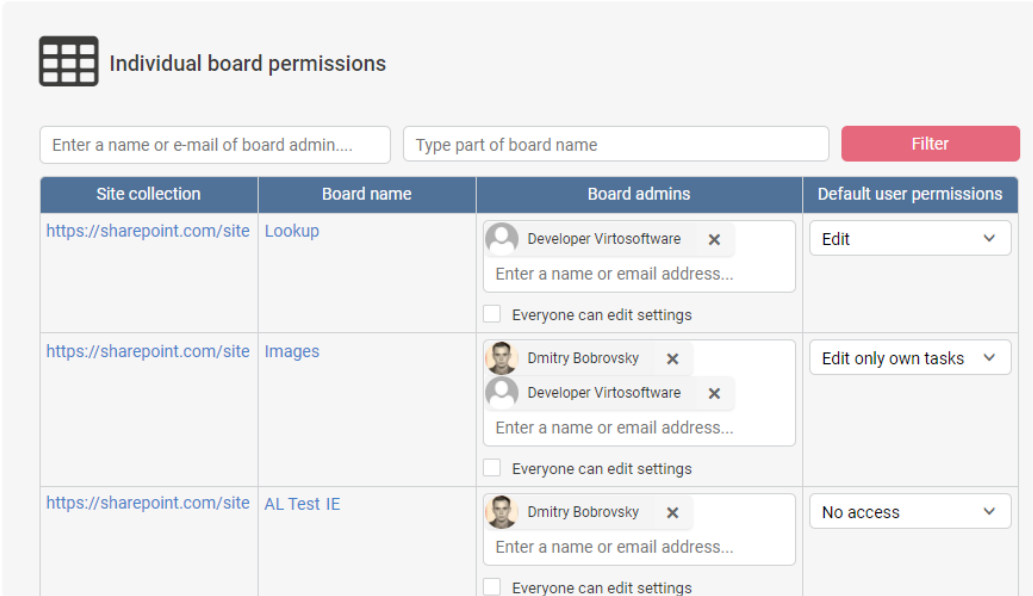
“**Admin panel managers**” field allows you to add people who can manage the Admin Panel.

Do not forget to click “Save” if you have made any changes to the global settings and need to apply them.

## Individual Board Settings

This block consists of two fields for data entering and a search button. When you click “Filter”, the table with search results is displayed.

This field is designed to allow fast editing of multiple boards.



**Individual board permissions**

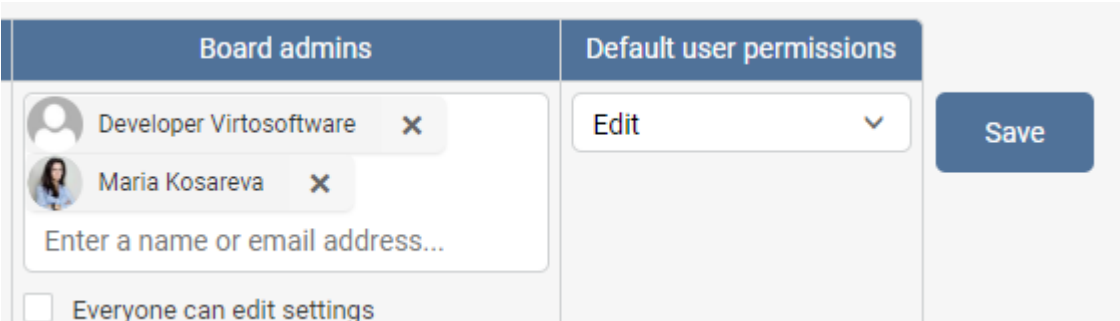
Enter a name or e-mail of board admin... Type part of board name **Filter**

Site collection	Board name	Board admins	Default user permissions
<a href="https://sharepoint.com/site">https://sharepoint.com/site</a>	<a href="#">Lookup</a>	Developer Virtosoftware ✕ Enter a name or email address... <input type="checkbox"/> Everyone can edit settings	Edit ▼
<a href="https://sharepoint.com/site">https://sharepoint.com/site</a>	<a href="#">Images</a>	Dmitry Bobrovsky ✕ Developer Virtosoftware ✕ Enter a name or email address... <input type="checkbox"/> Everyone can edit settings	Edit only own tasks ▼
<a href="https://sharepoint.com/site">https://sharepoint.com/site</a>	<a href="#">AL Test IE</a>	Dmitry Bobrovsky ✕ Enter a name or email address... <input type="checkbox"/> Everyone can edit settings	No access ▼

The table consists of four columns as follows:

- **Site collection** with a hyperlink to the site collection.
- **Board name** with a hyperlink to the board that opens in a separate window.
- **Board admins:** users with access to board settings. There is a checkbox “Everyone can edit settings” in every cell of this column. If there are no selected users in this field, the checkbox is checked by default. If the checkbox is unchecked, the field is active and available for editing. When a new board is created, a user on behalf of which it is added appears in the “Board admin” field.
- **Default user permissions** — default access settings predefined for this board.

When there are any changes in “Board admins” or “Default user permissions” columns, “Save” button appears next to the changed field. Use it to save the changes in the table.



**Board admins** **Default user permissions**

Developer Virtosoftware ✕  
 Maria Kosareva ✕  
 Enter a name or email address...  
 Everyone can edit settings

Edit ▼ **Save**

## Types of Board Permissions

The following types of board permissions are available:

**No access** — users with “no access” permission cannot view or edit boards and lists. If he/she tries to open the board page, “Access denied” message appears (“You do not have permission to perform this action or access this resource”).

**View only** — “view only” users can view the boards, cards and attached files, history, and charts. These users cannot create new cards and delete/clone existing ones.

**Edit** — users with “edit” permission can view, add, edit, clone, and delete the board elements (cards and attachments). Can view history and charts.

**Edit only own tasks** — ability to manage assigned cards (view, edit, add, clone, and delete). It is allowed to view the boards, cards, and attached files, history, and charts.

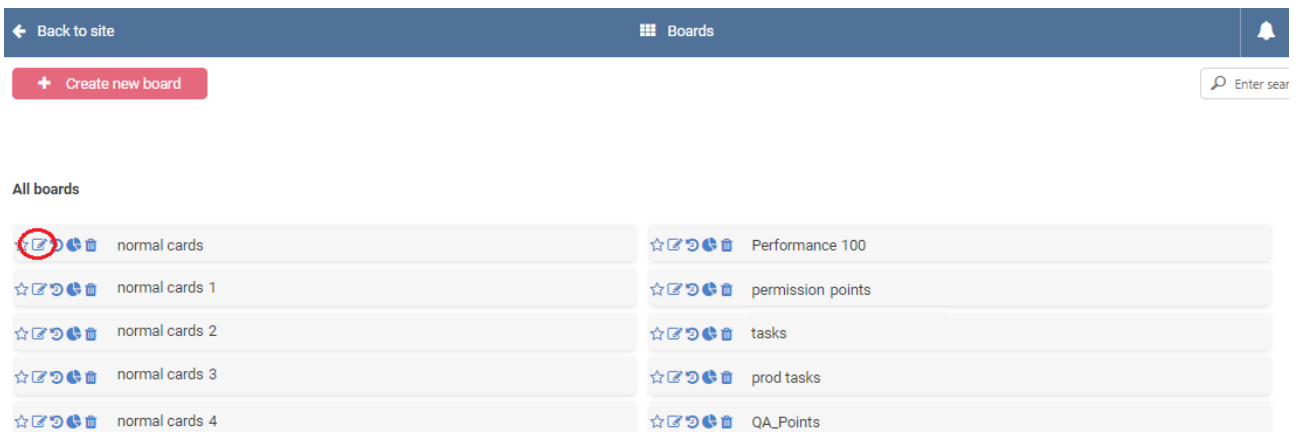
Pay attention to the default user permissions. If you are a board admin, you can override them for a specific board.

## 4 Detailed Permissions of an Individual Board

Besides individual board permissions, you can specify detailed permissions for the boards. It is possible to open detailed permissions settings in two ways.

### Option 1

- 1) Click “Edit” next to the required board in the boards list.



- 2) Open the “Advanced Setup” tab and roll down to “Permissions”.

The screenshot shows the 'Boards' settings interface. At the top, there are four tabs: 'List Setup', 'Board Setup', 'Cards Setup', and 'Advanced Setup'. The 'Advanced Setup' tab is highlighted with a red circle. Below the tabs, there are three main sections:

- Filters:** Includes a sub-section 'Filters description' and a red 'Add filter' button.
- Notifications:** Includes a sub-section 'Notifications - email notifications about board changes' and a red 'Add notification' button. Below this is a section for 'Suggested Notification rules' with a description and four rule entries, each with a red 'on/off' toggle and a refresh icon:
  - New comment to task "[tag:Title]" (you are mentioned)
  - New comment to task "[tag:Title]" (assigned to you)
  - New comment to task "[tag:Title]" (created by you)
  - New comment to task "[tag:Title]" (you commented)
- Permissions:** This section is circled in red. It includes a checked checkbox for 'Everyone can edit settings' and a text input field labeled 'Boards admin'.

## Option 2

- 1) Or when you are already on the board page, click "Edit" next to the title of the board.

The screenshot shows a Kanban board interface. At the top, there is a navigation bar with 'Back to site', 'Boards', and a notification bell. Below the navigation bar, the board title 'Performance' is circled in red. To the right of the title is an 'Add task' button. The board is divided into four lanes: 'Not Started', 'In Progress', 'Completed', and 'Deferred'. The 'Not Started' lane contains a card titled 'Welcome To Virto Kanban Board' with a timestamp of '12/3/2019 1:51 AM'. The 'In Progress' lane contains a card titled 'Virto 1' with a timestamp of '3/5/2020 9:55 AM'.

- 3) Then open the "Advanced Setup" tab and roll down to "Permissions" the same way as described above.

The screenshot shows the 'Boards' settings interface. At the top, there is a dark blue header with a grid icon and the text 'Boards'. Below this is a navigation bar with four tabs: 'List Setup', 'Board Setup', 'Cards Setup', and 'Advanced Setup'. The 'Advanced Setup' tab is highlighted and circled in red. The main content area is divided into three sections:


- Filters**: Includes a sub-header 'Filters Filters description' and a red 'Add filter' button.
- Notifications**: Includes a sub-header 'Notifications - email notifications about board changes', a red 'Add notification' button, and a section for 'Suggested Notification rules' with a sub-header 'Suggested Notification rules description'. This section contains four blue bars, each representing a notification rule with a title and a red 'on/off' toggle and a refresh icon. The rules are:
  - New comment to task "[tag:Title]" (you are mentioned)
  - New comment to task "[tag:Title]" (assigned to you)
  - New comment to task "[tag:Title]" (created by you)
  - New comment to task "[tag:Title]" (you commented)
- Permissions**: This section is circled in red. It includes a checked checkbox for 'Everyone can edit settings' and a label 'Boards admin' above an empty text input field.

And this is how the full block of detailed permissions looks like.

**Permissions**

Everyone can edit settings

**Boards admin**

 Maria Kosareva ✕


Users list with permission to edit board settings

**Default user permissions \***

No access ▾


If not defined by the site collection

**Edit**

 Tatiana Sushchenko ✕ Enter a name or email address...

Full access list for managing all tasks

**View only**

 Dmitry Leytner ✕ 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

1. Use “**Everyone can edit settings**” checkbox to provide access to the settings for any users.
2. “**Boards admin**” field defines users with access to the board settings
3. You can see here the same “**Default user permissions**” field with the same value you would see in Admin panel. You can add SharePoint Groups to these fields, or rather select a default access level for all the users with a license, and then define the exceptions.

## Types of Detailed Permissions

Here are the types of detailed permissions for individual boards.

**Edit** — users with “Edit” permission have full access for managing all the tasks of the board. They can edit all the board content, but do not have access to the board settings.

**View only** — users with defined “View only” permission can view the board, cards and attached files, history, and charts but cannot make any changes to them.

**No access** — users with “No access” permission cannot view or edit the board, cards, charts, and history. This field has higher priority than other ones.

**Edit only own tasks** — if this permission is selected, user can edit only own tasks (except users with “Edit” permission) by default. User can also create a task but cannot assign it to someone else.

Default user permissions \*

No access

No access

View only

Edit

Edit only own tasks

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

**Only board admins can delete boards.**

A user can be added only to a single field related to content permissions (Edit, View only, No access). If we add a user to a field and he/she is already selected in another field, then verification should be held, and an error shown “*User permissions are already specified. You can select from Edit, View or No access by adding user into the corresponding list.*”

**Boards migration**

If you are an existing customer and your board is getting migrated there might happen a situation when the board owner is not known. In these cases, we automatically enable the “Everyone can edit settings” checkbox.