Kanban Board Pro

Overview & quick start

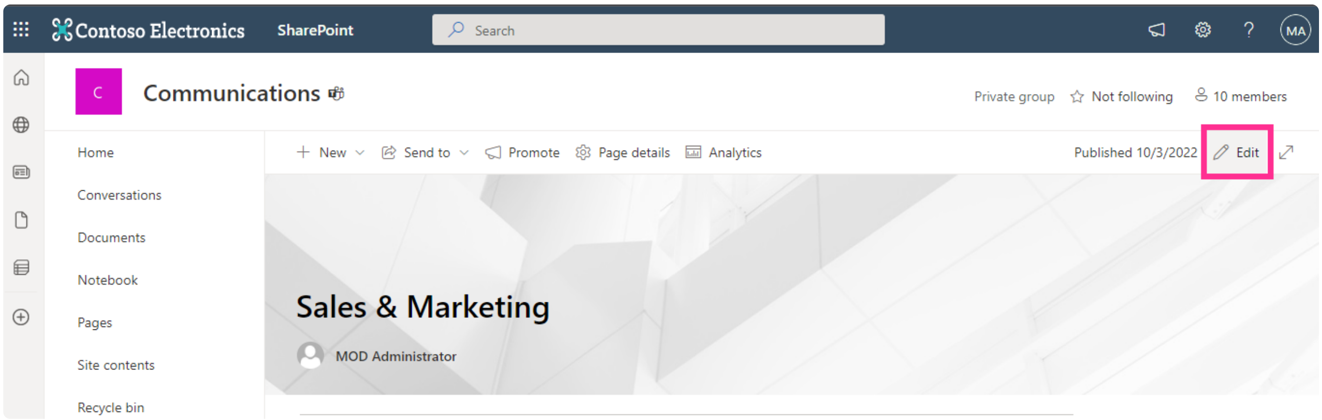
👋 About Virto Kanban Board Pro

Kanban Board Pro by Virto visualizes and manages tasks in SharePoint and Microsoft Teams. Using this component, you can display any SharePoint list as a kanban board dividing cards into columns and swimlanes (usually according to their status) and showing tasks to be done. With this visual picture of the task process, managers can quickly identify bottlenecks and blockers; less time is spent sorting out how projects are progressing due to the visual method of task management.

✨ Getting started with Virto Kanban Pro

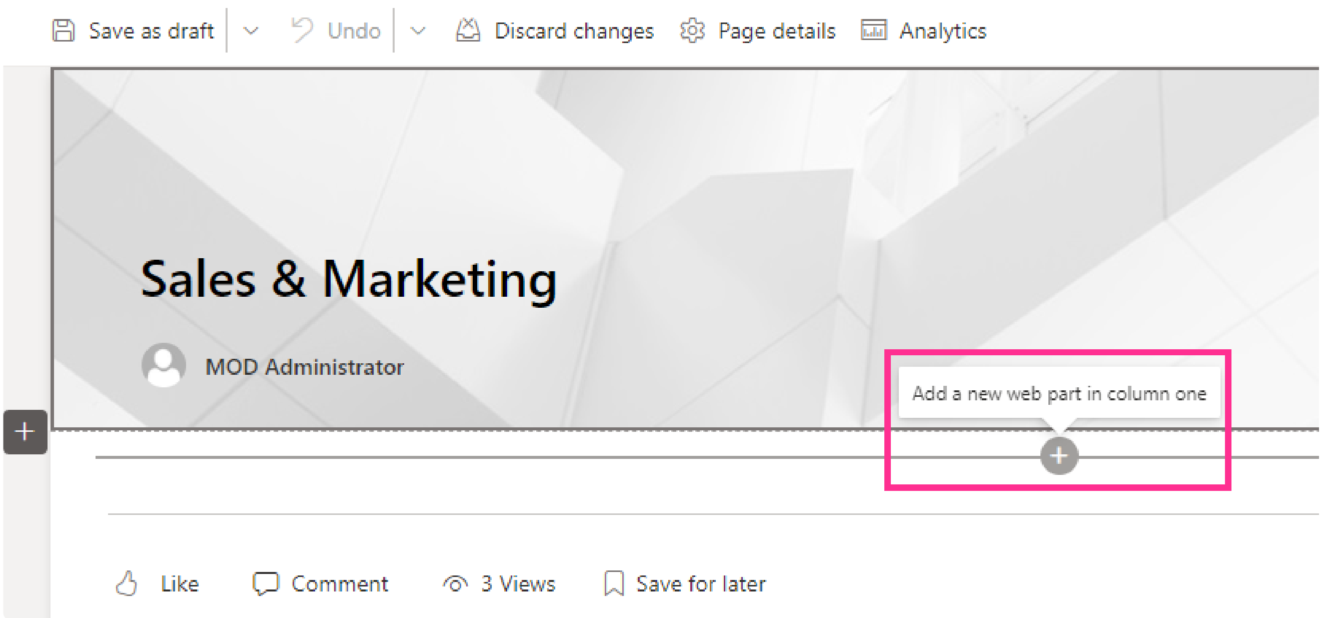
Have you just installed Kanban Board Pro to your SharePoint site but aren't sure what the next step is? We're here to help you get started.

Go to the SharePoint site page where you'd like to add Kanban Board and switch to edit mode



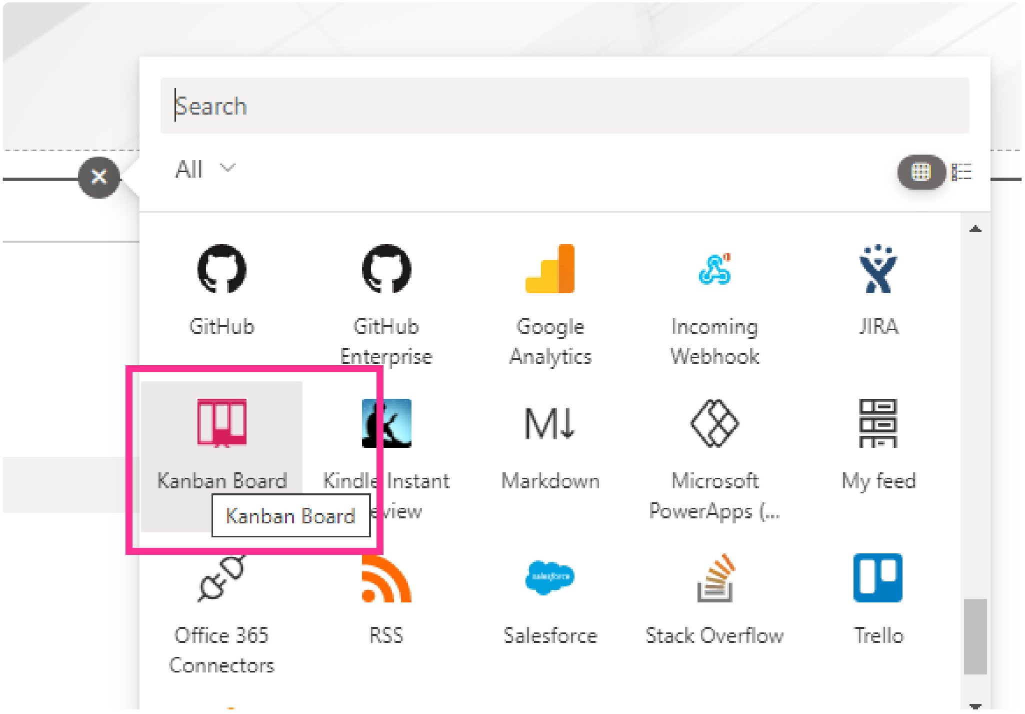
Switch to Edit page mode

Click the plus icon to add a new web part in column one.



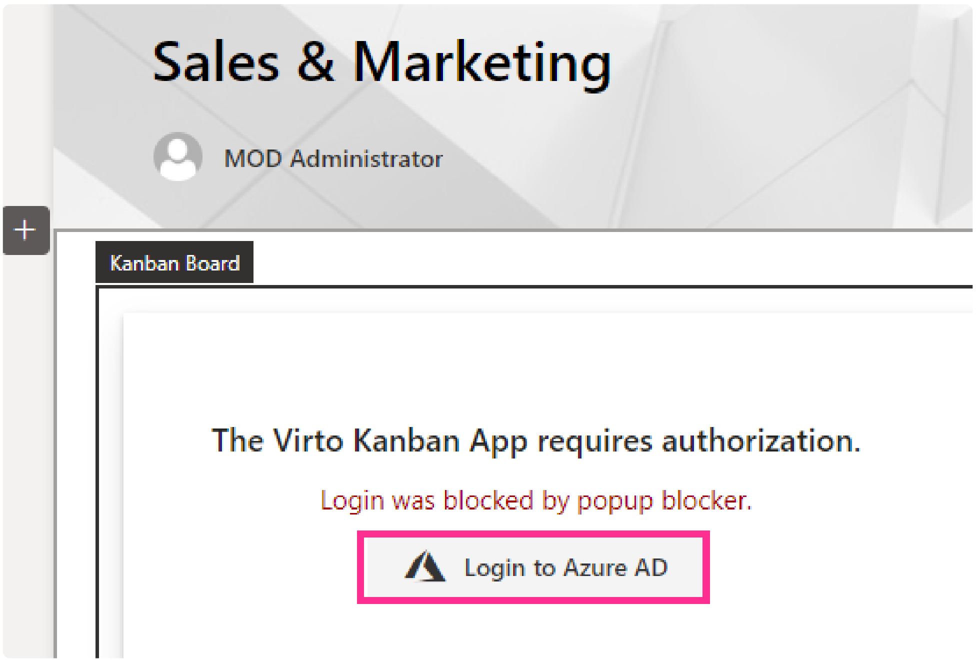
Add a new web part

Add Kanban Board and remember to republish the page.



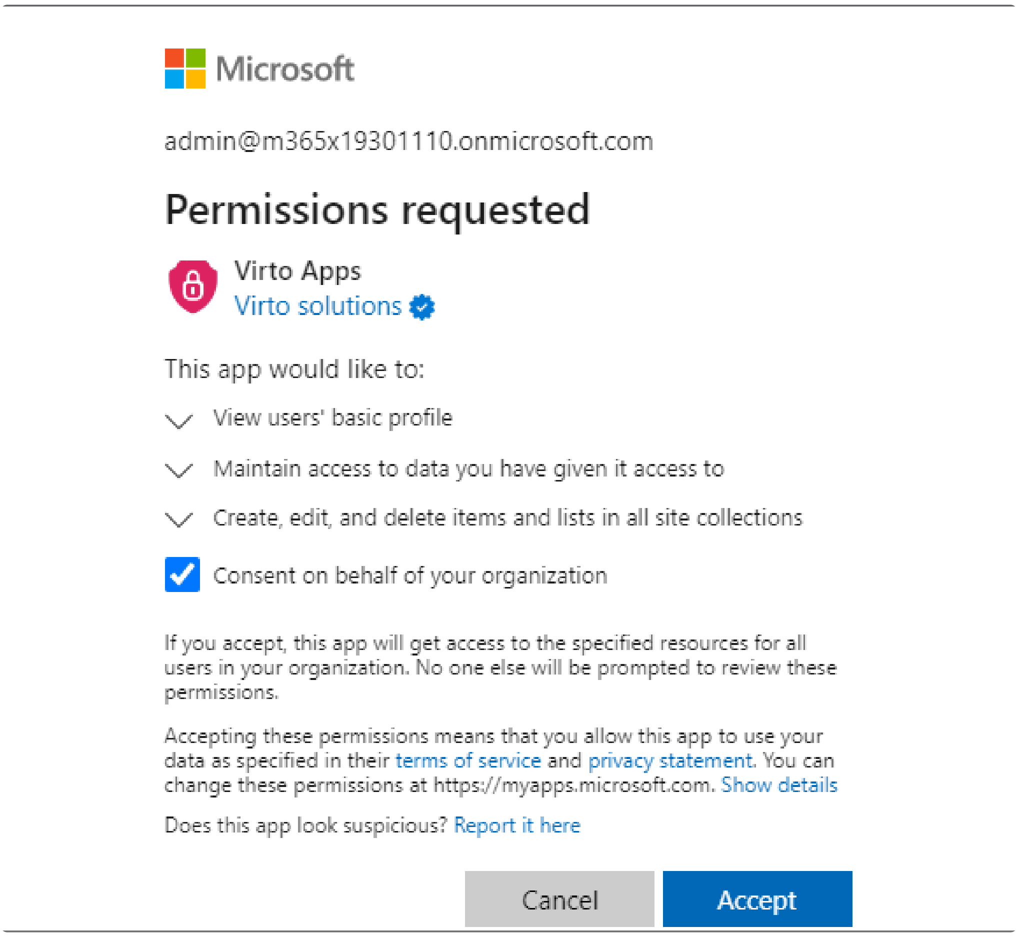
Add Kanban Board

If you see the permissions request, click "**Login to Azure AD**."



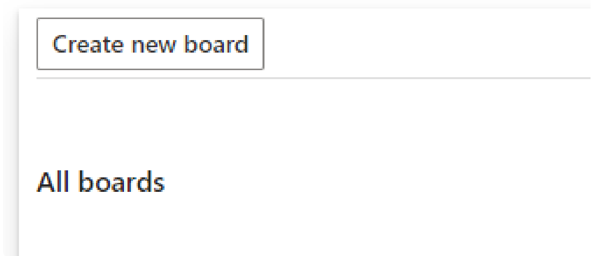
Login to start authorization

Click the checkbox for “Consent on behalf of your organization” and then click “Accept.” If you don’t have administrator rights, ask your tenant administrator to complete this step.



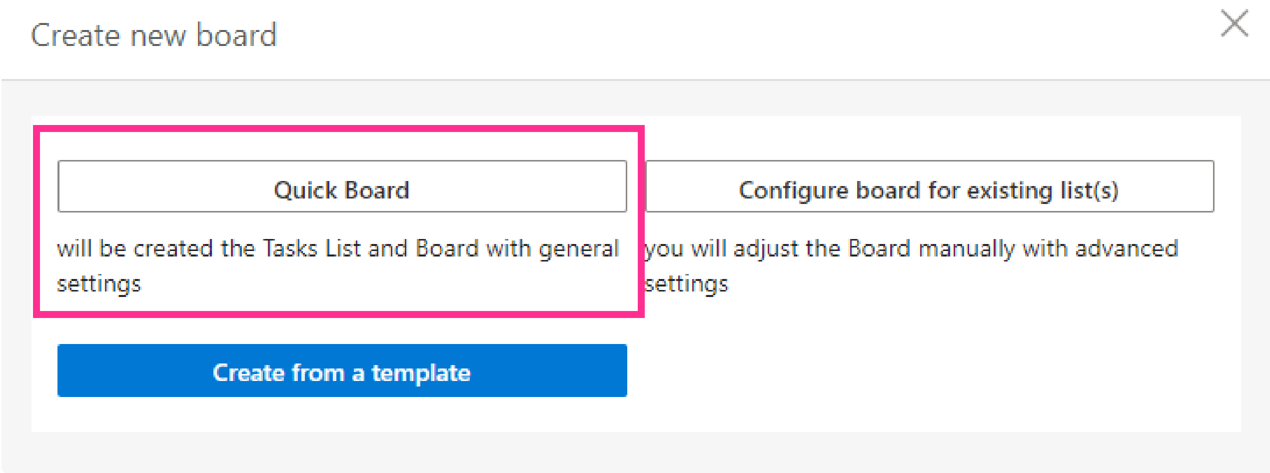
Kanban Authorization

Now you can create your first kanban board. To do this, click "Create new board."



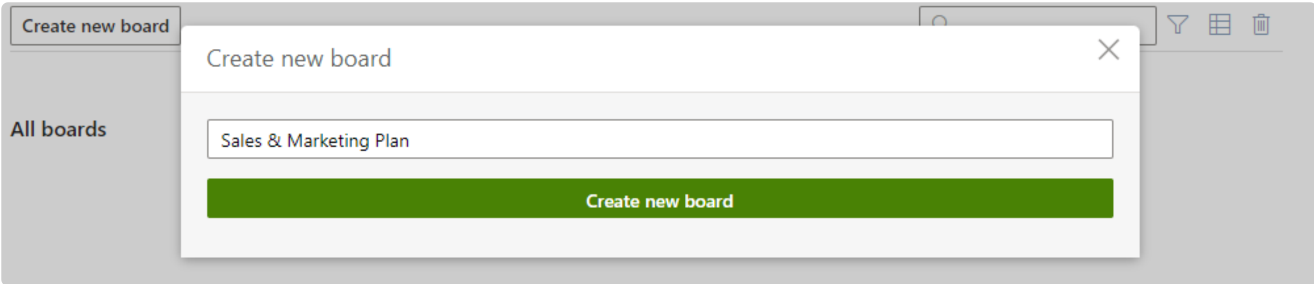
Create new board

You have three options: create a quick board, use an existing SharePoint list, or use a template. Let's create a quick board.



Choose a quick board

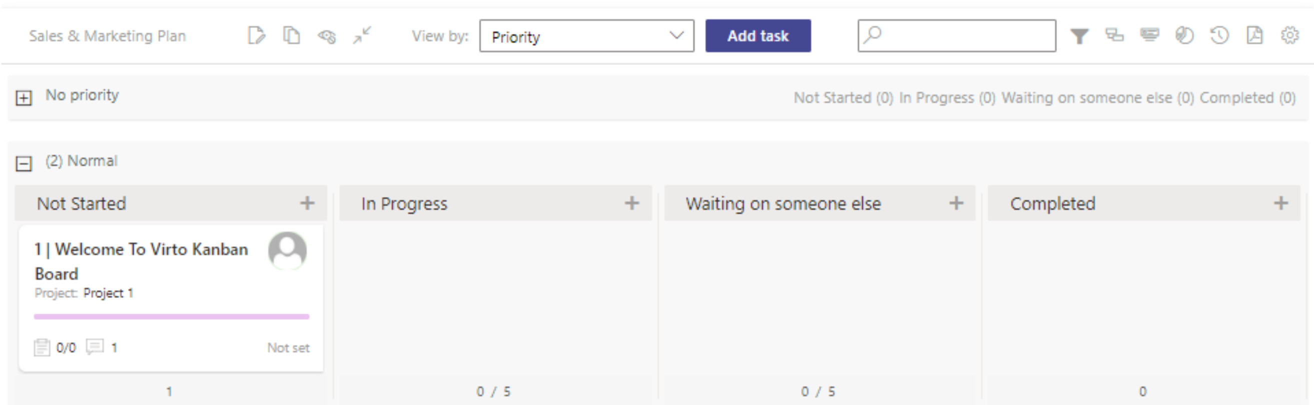
Specify a name for the first board and click “Create new board.”



Board creation

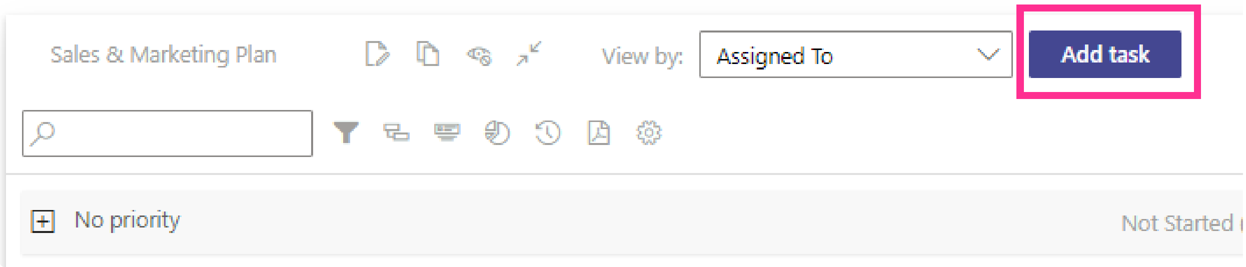
Now you will see a board containing four columns and one task.

> Every board uses a SharePoint list (or multiple lists) as a data source. When you create a quick board, the list with all the necessary fields and preferences is created automatically.



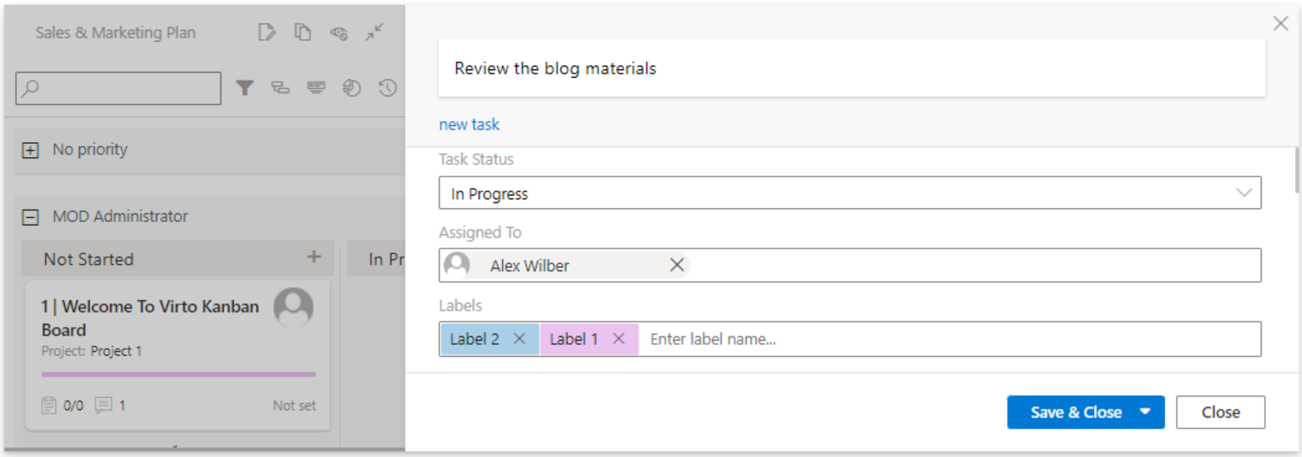
New board

Now let’s create a new task.



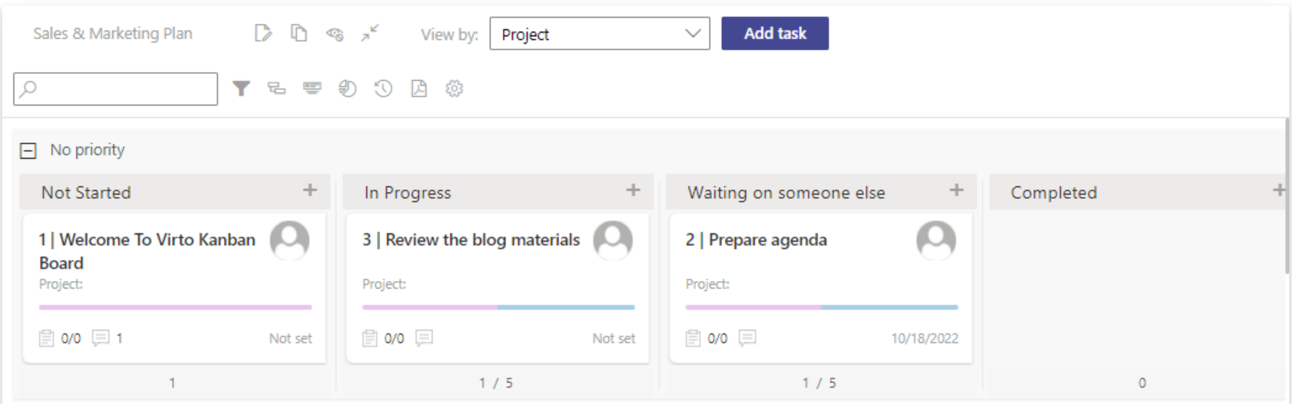
New task creation

Fill in the task form and save the task (by clicking “Save & Close”).



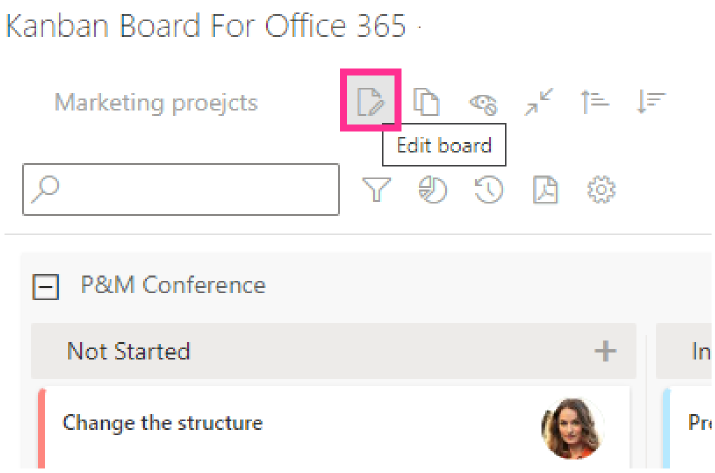
Fill in the task form

The new task will appear on your board. You can drag and drop it to change the status.



Created Kanban board

Here is your first kanban board! Later on, you can tune it as you wish using the edit board button.



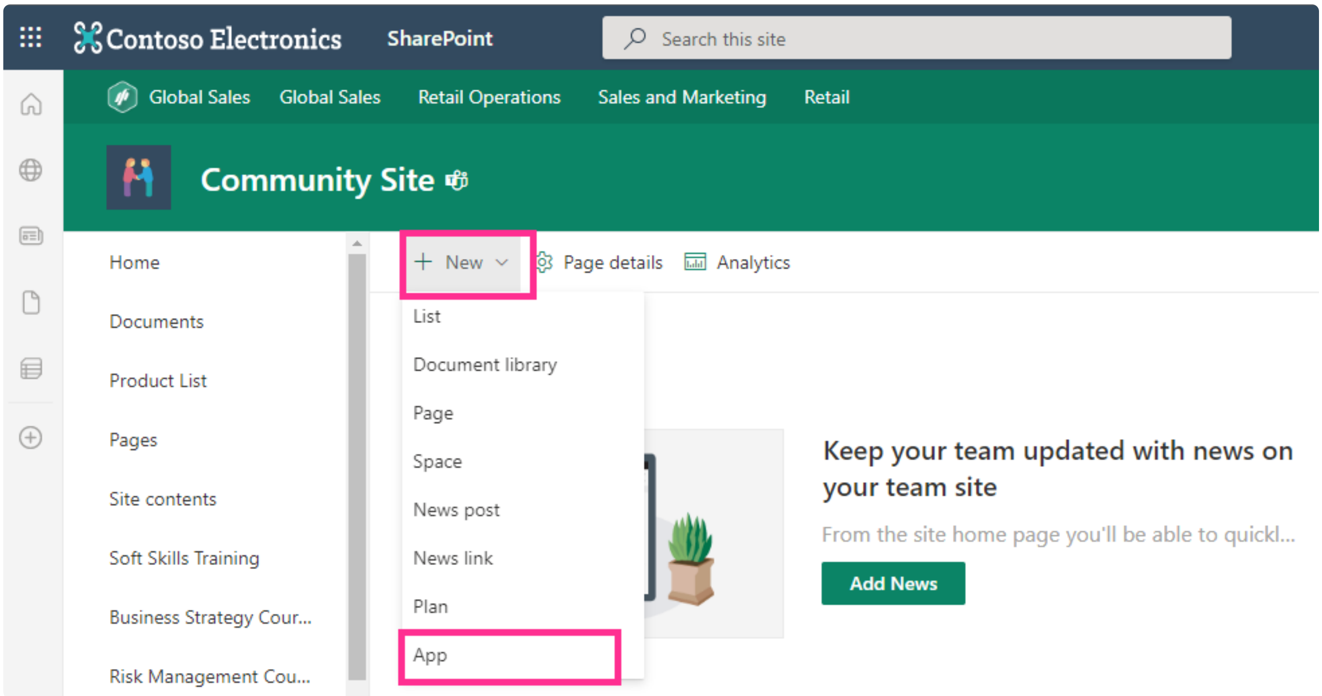
Edit board

Book a **free 15-minute meeting** with our technical team if you have any questions regarding setup, features, or pricing.

installation & configuration

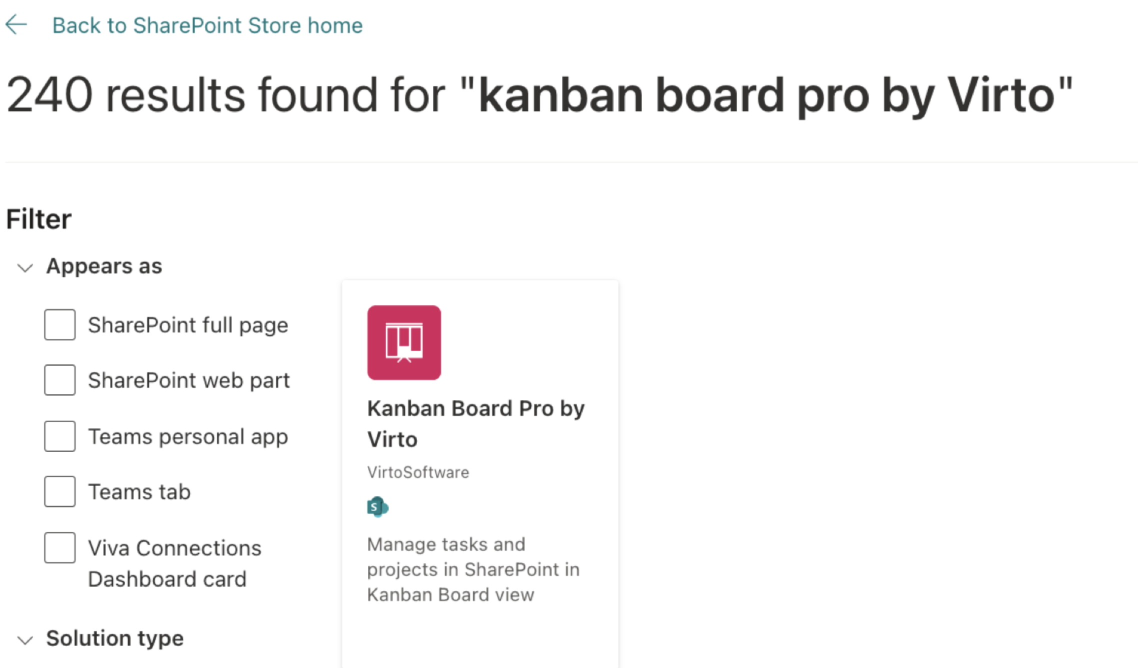
Installing Kanban Board Pro by Virto

Open the SharePoint site where you want to add the Kanban Board app and choose “**App**” in the “**New**” drop-down menu.



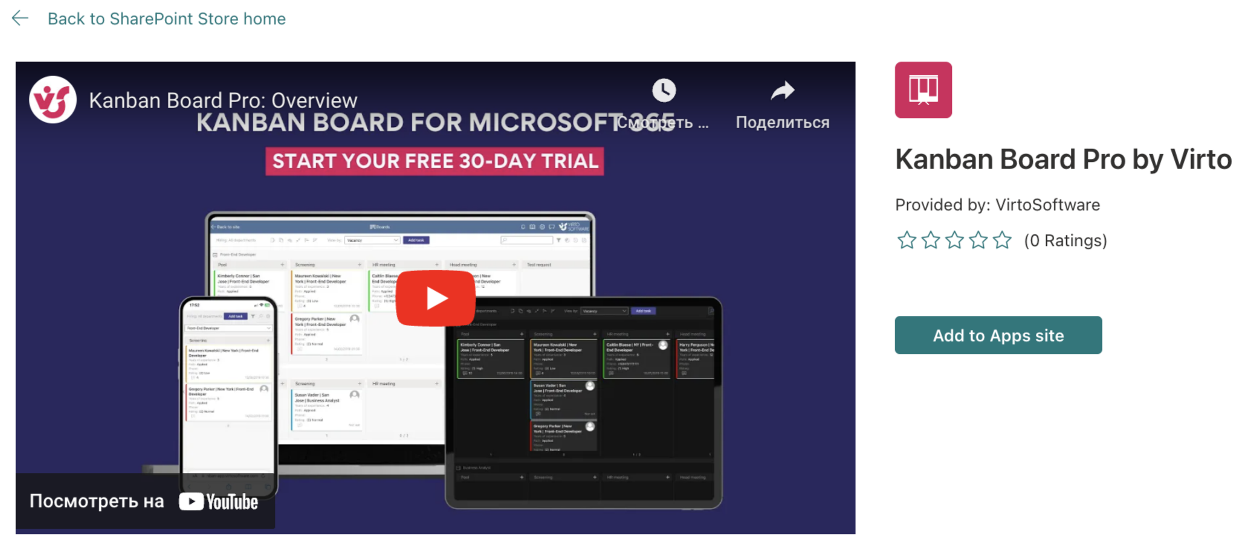
Add new app

Search for "**kanban**" and find Kanban Board Pro by Virto in the list of available apps in the SharePoint store.

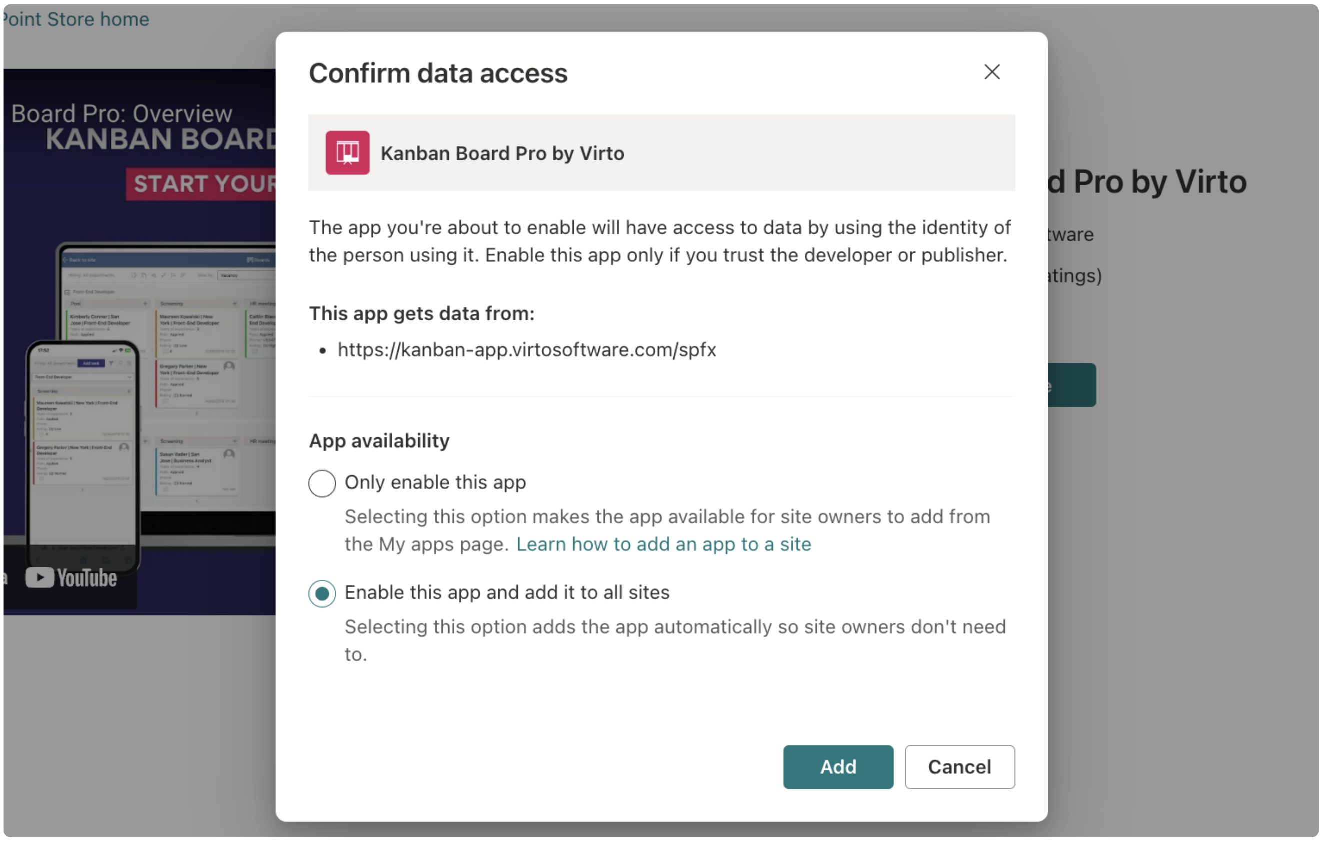


Search for Kanban Board Pro by Virto

Click **on the "Kanban Board Pro by Virto**" app.



Click "**Add to Apps site.**"

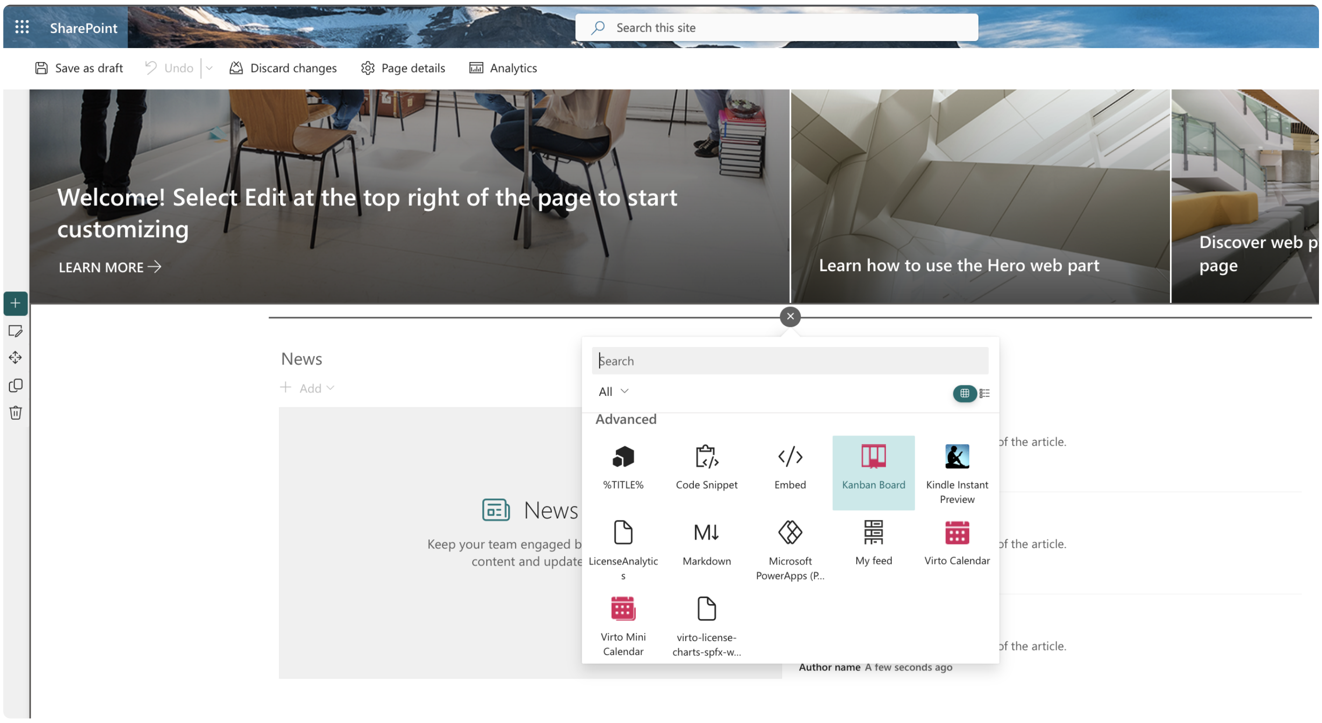


Then "**Confirm data access**" window will pop up. Kanban Board Pro can be added to all tenant sites (second option) or just allowed to be added by a SharePoint administrator (first option).

If you choose the first option (**Only enable this app**), you will need to add an app to each site where you want to use it.

> **Note**: if you use Calendar Overlay Pro and has already given permission to this app, you won't need to do it for Kanban Board Pro.

Now you can add the app to your SharePoint site, just like you add any other app.



Add Kanban Board Pro to your site page

Adding Kanban Board to a page

When you have installed Kanban Board by Virto to your SharePoint site, you can add it to site pages as a web part. Open the page where you'd like to add the Kanban Board app and switch to edit mode.

Click “Add a new web part.”

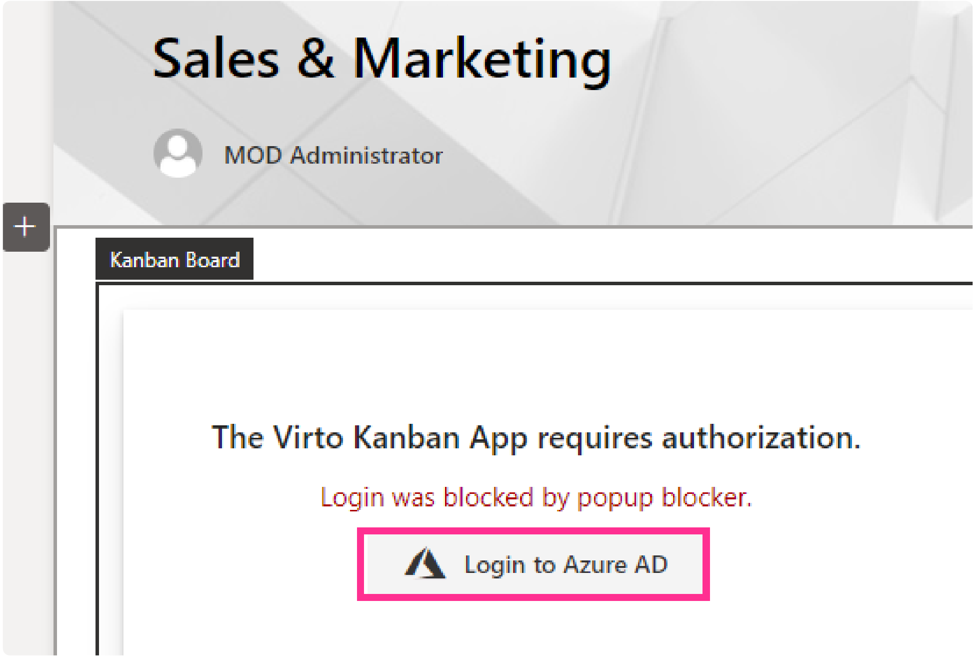
Search for Kanban Board Pro and select it.

Republish the page.

Now the Kanban Board app will be available on the chosen SharePoint site.

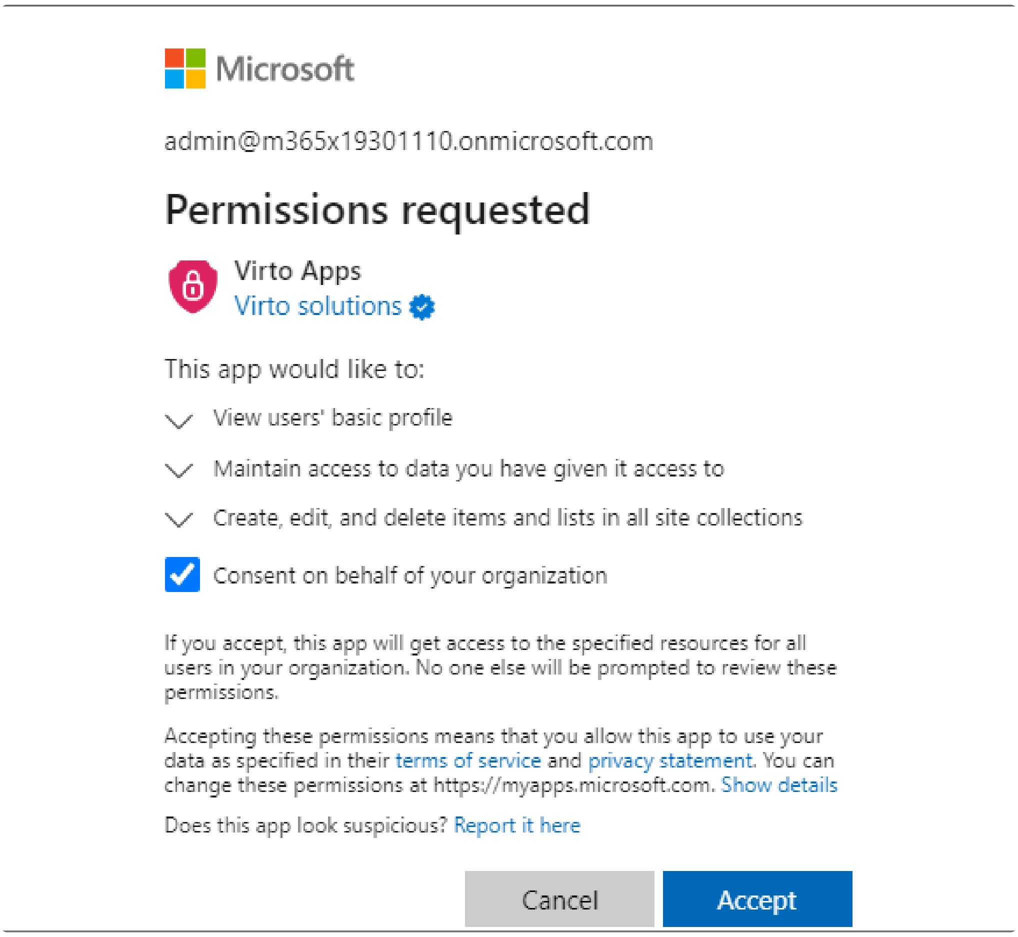
Kanban authorization

If you have installed the Virto Kanban Board app and see the permissions request, click "**Login to Azure AD**."



Login to sart authorization

Click the checkbox for “Consent on behalf of your organization” and then click “Accept.” If you don’t have administrator rights, ask your tenant administrator to complete this step.



Kanban Authorization

Permissions & system requirements

System requirements

Operating System

SharePoint Online / Office 365

Browser

Microsoft Edge, Google Chrome, Mozilla Firefox, Microsoft Internet Explorer 11.

Kanban Board Pro permissions

What are Kanban Board Pro user permissions for?

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

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 their permissions are not configured individually.

User permissions can enable users to carry out the following actions:

- view the information,
- edit information,
- manage settings.

To understand the logic of Kanban Board's permissions, please keep in mind that Kanban Board visualizes the information that is stored in your SharePoint list. To edit information on the board, the user must have permission to edit and save the SharePoint list item.

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

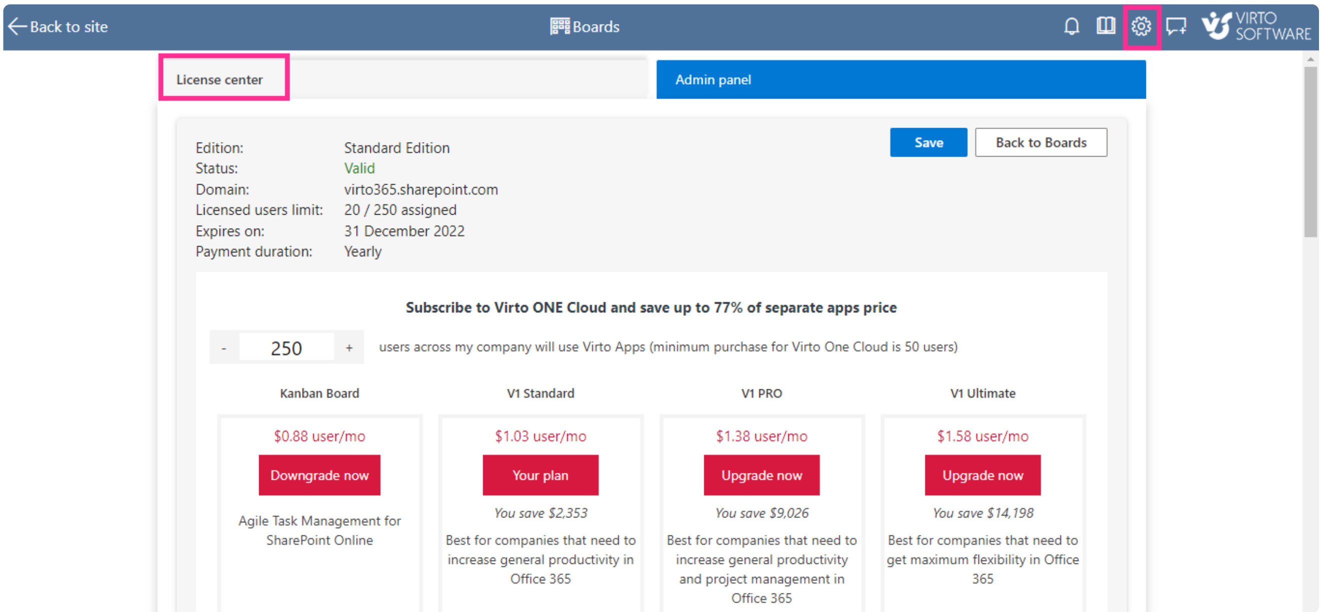
There are three roles in the Kanban Board app:

- license manager
- board admin
- a user with default or defined board permissions

License management

License center

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



License center tab

You can use the license center block for these actions:

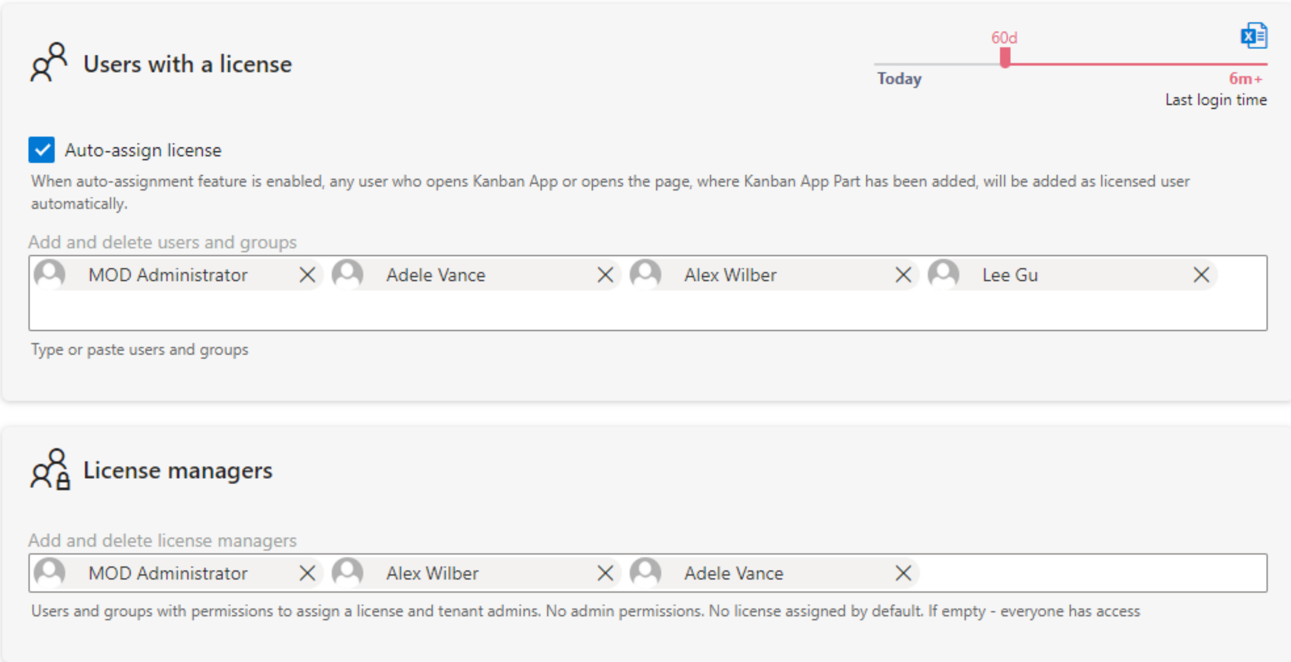
- check the license status
- manage the subscription (renew or upgrade it)
- add licenses to users or delete licenses
- add or delete individual license admins or SharePoint groups

Assigning a license does not assign user permission to the boards. A user can have a license without having access to the board if you set it up that way in the admin panel.

Users with a license

The complete list of users with licenses is displayed in the “**Users with a license**” list (scroll down in the “**License center**” tab to find it). You can add SharePoint user groups in this field. In addition, you will see the list of users, not a group name. You can insert numerous SharePoint groups here; each user will only be added once, so you do not need to worry about duplicates.

Enable the "**Auto-assign license**" feature, if you need to assign users a license automatically when they're trying to access Kanban Board Pro for the first time.

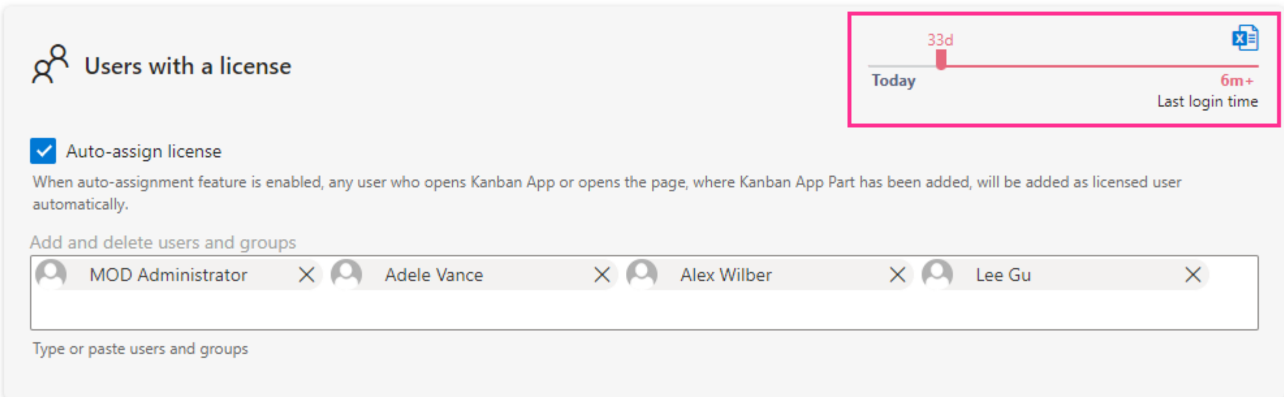


Users with a license

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.

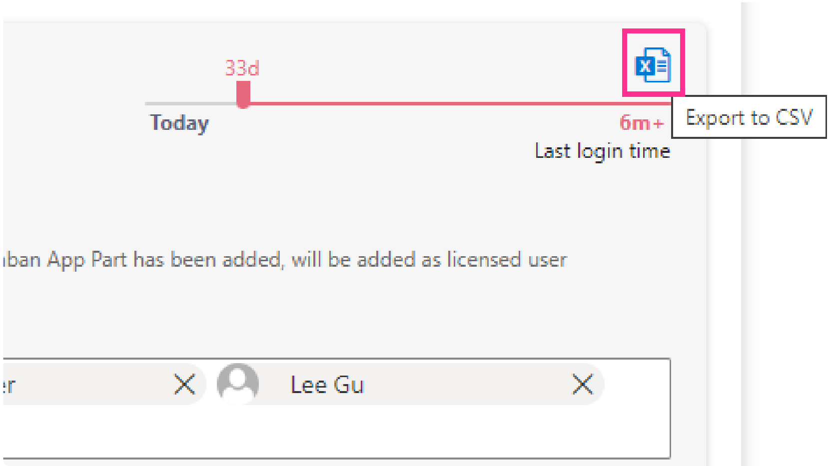
Last login time slider

The slider on the right highlights users of your organization who have not used Kanban Board for some time. You can move the slider to change the time and determine whether users are inactive (they will be highlighted in red) and how long it has been since they last used the tool.



Last login time slider

You can also export the list of users in CSV format. The list will contain the name of the licensed users, their email, and their last login time.

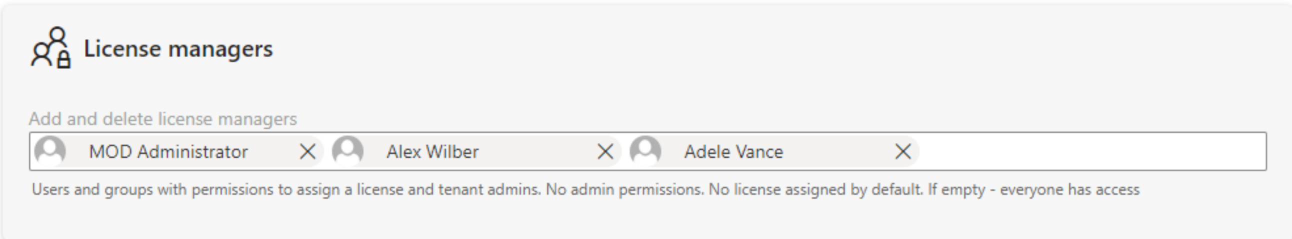


Export to CSV

License manager

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

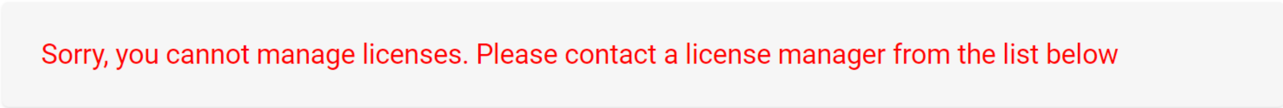
This is done to simplify the migration of the existing boards into the new permissions model.



License managers

License management is available only for the users added to the “License managers” field. Here are five things about license management to keep in mind:

- **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.
- **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 them 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.
- **If there is at least one user added to the license manager field** and someone is trying to access the license center, they will see the message below and should request access from the license manager.

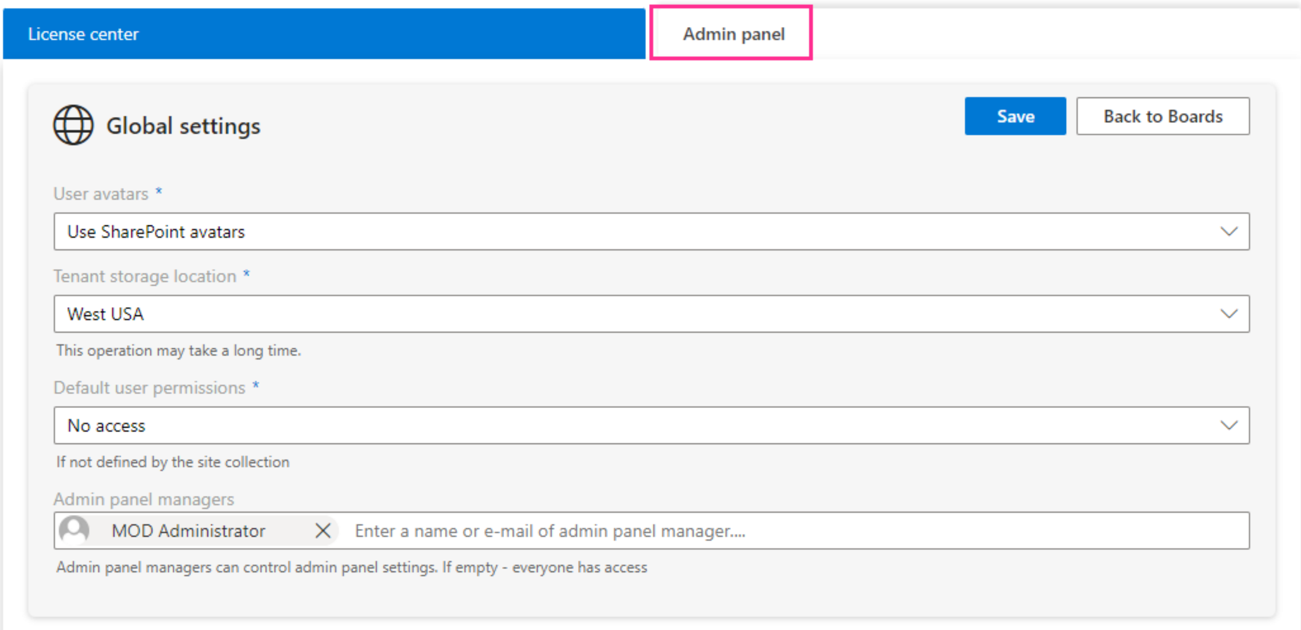


Alert message

- **If you are not a licensing manager**, you can find license managers in the “**License managers**” block of the license center (in the “**Add and delete license managers**” field).
- **If you accidentally lost the license admin permissions**, you can request them 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.

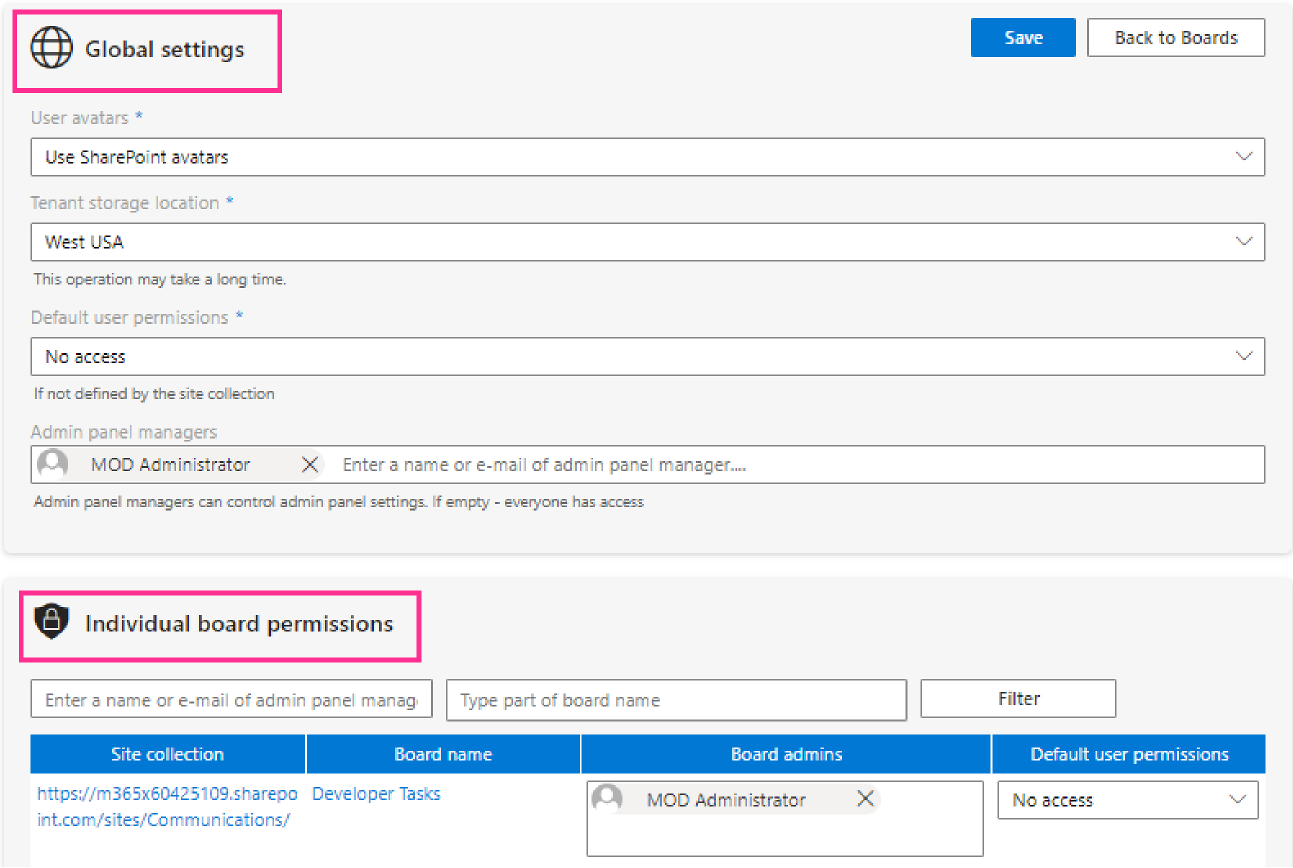
Admin panel settings

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



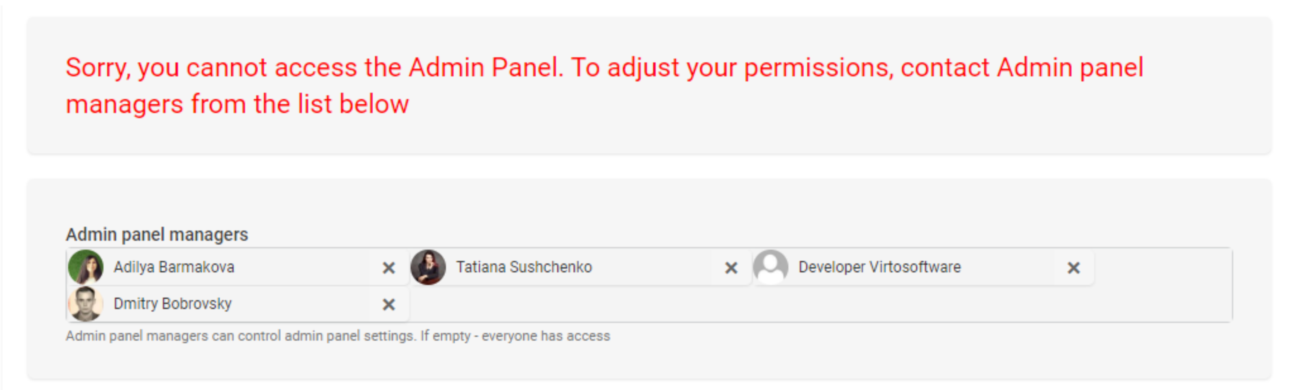
Admin panel

- For new users/accounts or while installing the trial version, the admin panel menu will open for the subscription administrator. The administrator is shown in the “**Admin panel managers**” field.
- If you were the admin in the previous version of the permissions, you will be added as an admin panel manager.
- With the new permission model, you are no longer able to delete the last admin panel manager. The current user will be automatically added to “**Admin panel managers**” upon refresh.
- The page of admin panel settings consists of two blocks: global settings and individual board permissions.



Global settings and Individual board permissions

- If you are not added to the admin panel managers list, you cannot access this block of settings. If you see the following notification, please contact one of the admin panel managers; they can provide you with access.



Cannot access alert message

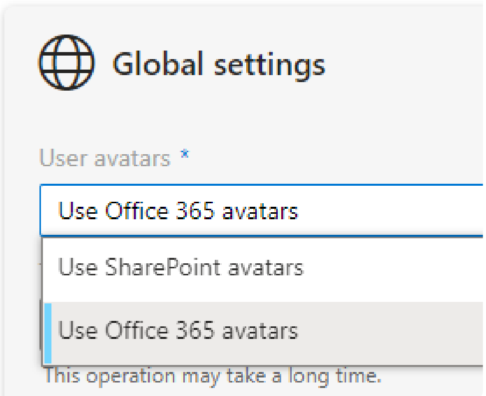
If you accidentally lost admin panel permissions, request it back from any of the current admin panel managers (just use the gear icon in the upper right corner and open “**Admin panel**”).

Global settings

Global settings define what actions will be available for general users for the whole Kanban Board app.

Global settings

The “**User avatars**” setting allows using avatars from SharePoint or Office 365.



Use avatars

The “**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 your board on our side. Everything is kept on your SharePoint instance, in Microsoft’s cloud.

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

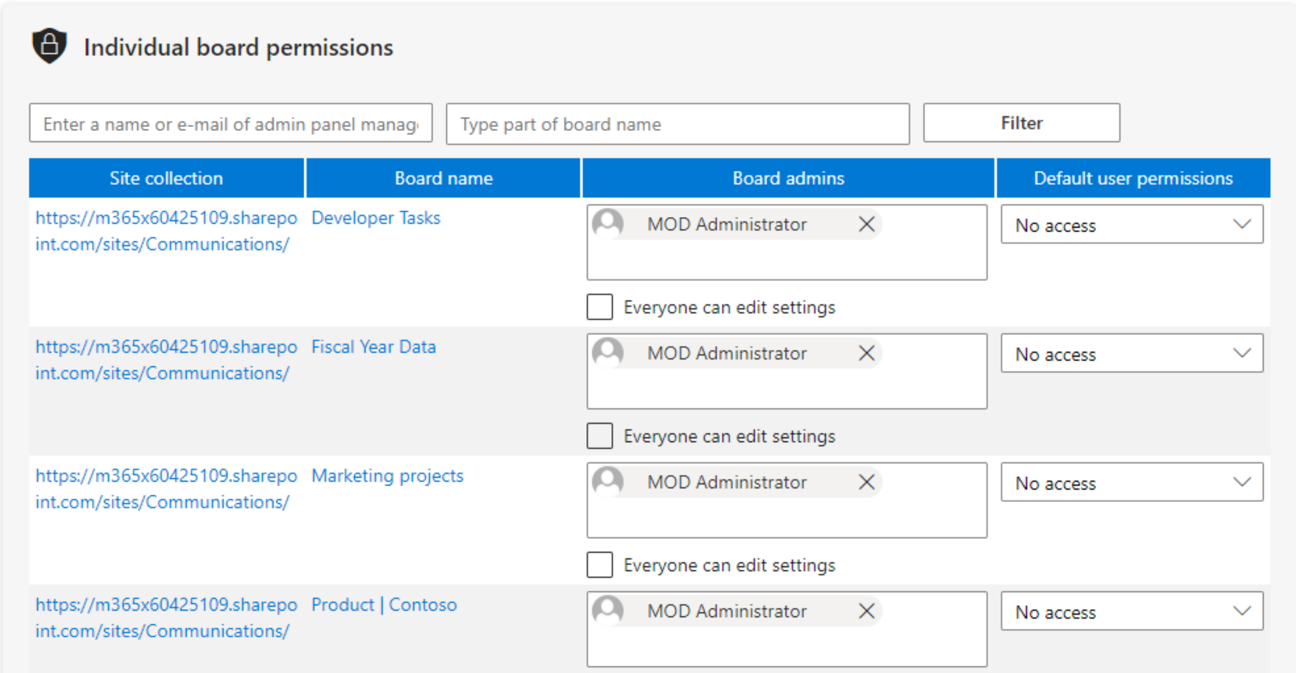
The “**Admin panel managers**” field allows you to add people who can manage the admin panel.

Remember to click “Save” if you have made any changes to the global settings to apply them.

Individual board settings

This block consists of two fields for entering data 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.

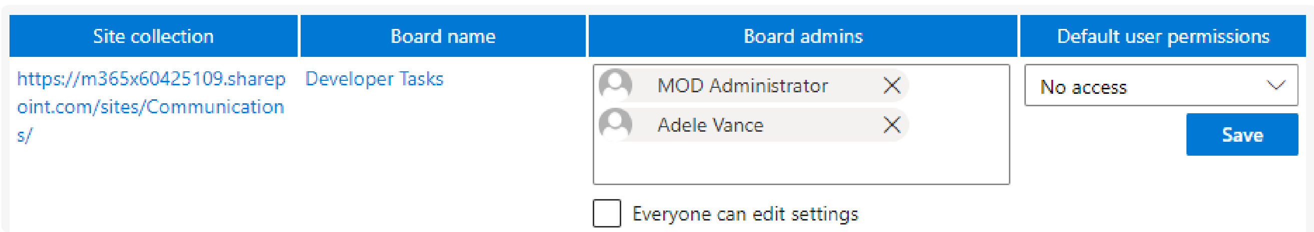


Individual board permissions

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, epy user on behalf of whom it is added appears in the "**Board admins**" field.
- **Default user permissions** are displaying the default access settings predefined for this board.

When any changes are made to the "**Board admins**" or "**Default user permissions**" columns, the "**Save**" button will appear next to the changed field. Click it to save the changes in the table.



Save the changes

Types of board permissions

The following types of board permissions are available:

No access—users with "no access" cannot view or edit boards or lists. If they try to open the board page, an "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, delete, or clone cards.

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

Edit only own tasks — this permission setting allows users to manage (view, edit, add, clone, and delete) assigned cards. They can view the boards, cards, attached files, history, and charts.

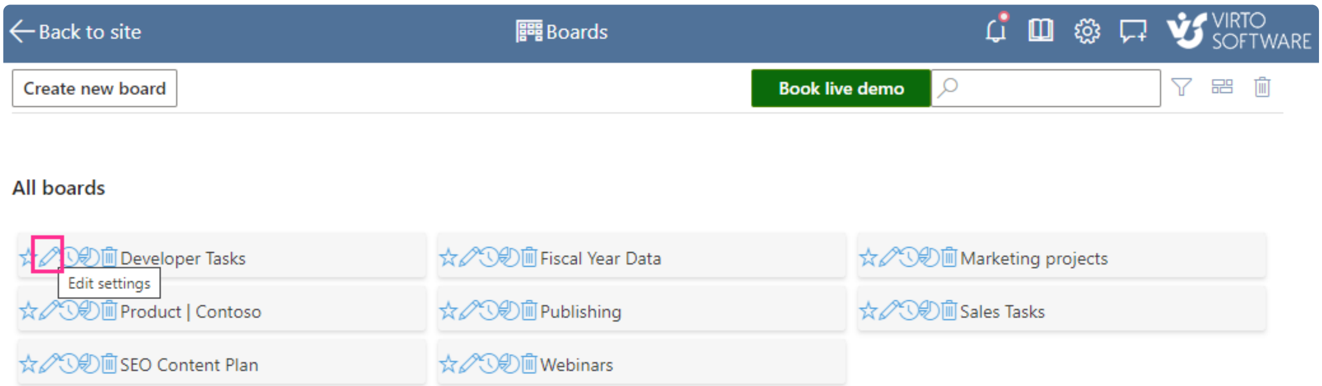
Pay attention to the default user permissions. If you are a board admin, you can override them for a specific board.

Detailed permissions for an individual board

In addition to individual board permissions, you can specify detailed permissions for the boards. You can open the detailed permissions settings in two ways.

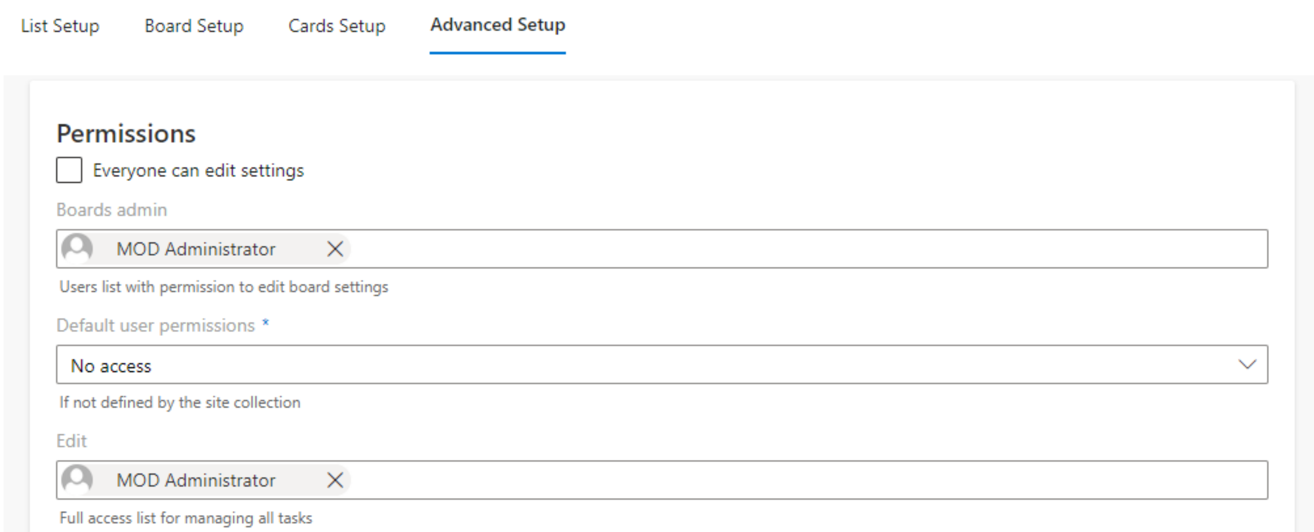
Option 1

First, click the edit settings icon next to the required board in the boards list.



Edit board

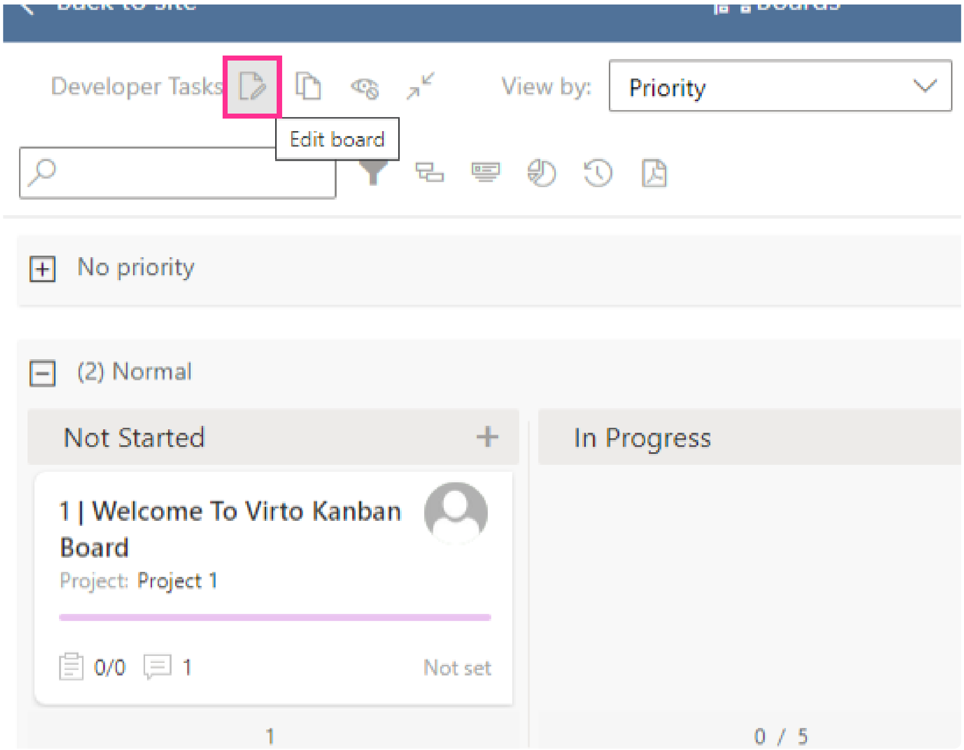
Then open the “**Advanced Setup**” tab and scroll down to “**Permissions**.”



Permissions in Advanced setup

Option 2

Alternatively, when you are already on the board page, click the edit board icon next to the board title.



Edit board

Then open the "**Advanced Setup**" tab and scroll down to "**Permissions**" as described above. This is how the full block of detailed board permissions looks.

Board permissions

Use the "**Everyone can edit settings**" checkbox to provide access to the settings for all users.

The "**Boards admin**" field defines users with access to the board settings.

You can see here the same "**Default user permissions**" field with the same value you would see in the admin panel. You can add SharePoint groups to these fields or select a default access level for all users with a license.

Types of detailed permissions

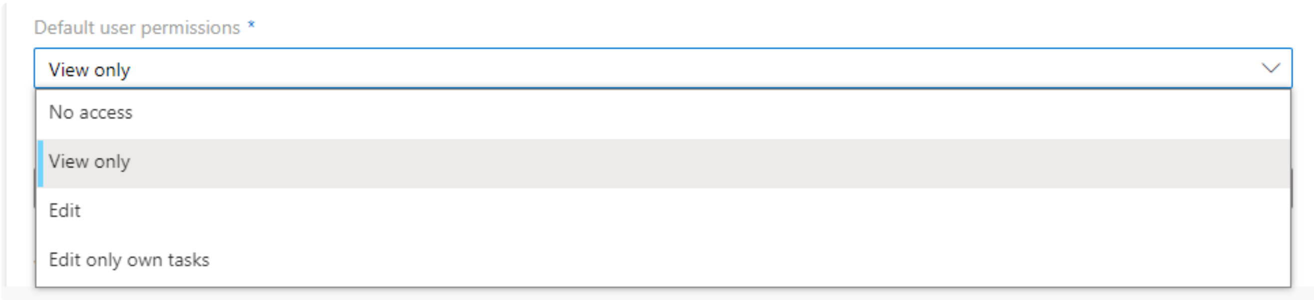
Here are the types of detailed permissions for individual boards.

Edit—users with “edit” permission have full access to 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, 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, or history. This field has higher priority than others.

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



Default permissions

Only board admins can delete boards.

A user can only be added to a single content permissions field (edit, edit only own tasks, view only, or no access). If we add a user to a field and they are already selected in another field, then an error is displayed: “**User permissions are already specified**.” You can assign them to edit, edit only own tasks, view only, or no access by adding the user to the corresponding list.

Boards migration

If you are an existing customer and your board is being migrated, the situation may arise where the board owner is not known. In these cases, we automatically enable the “**Everyone can edit settings**” checkbox.

Kanban Board Features & Settings

Creating a kanban board

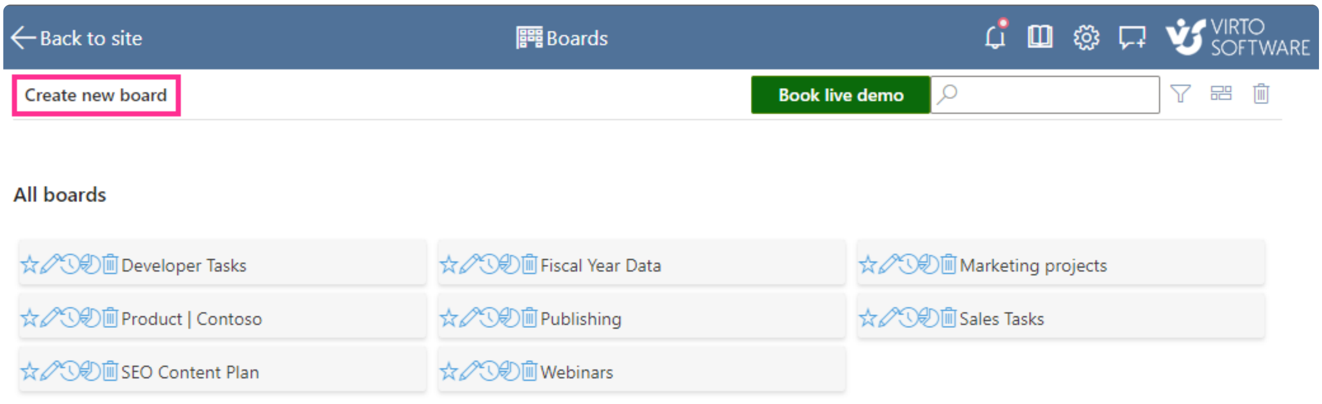
There are three options for creating a new kanban board.

- **From an existing SharePoint list**—in this case, you need to choose a list you wish to use as a data source for your board. Traditionally, a task list is used for a kanban board, but you can use any custom list from SharePoint. If any required fields are missing, you’ll be able to add them in the board settings.
- **Create a quick board**—if you don’t know which list to choose or you don't have an appropriate list already, you can create a quick board. When creating a quick board, the list with all the necessary fields and preferences will appear in the system automatically.
- **From a board template**—Kanban Board Pro supports saving board templates. You can then use these templates when you create a new board.

Creating a quick board

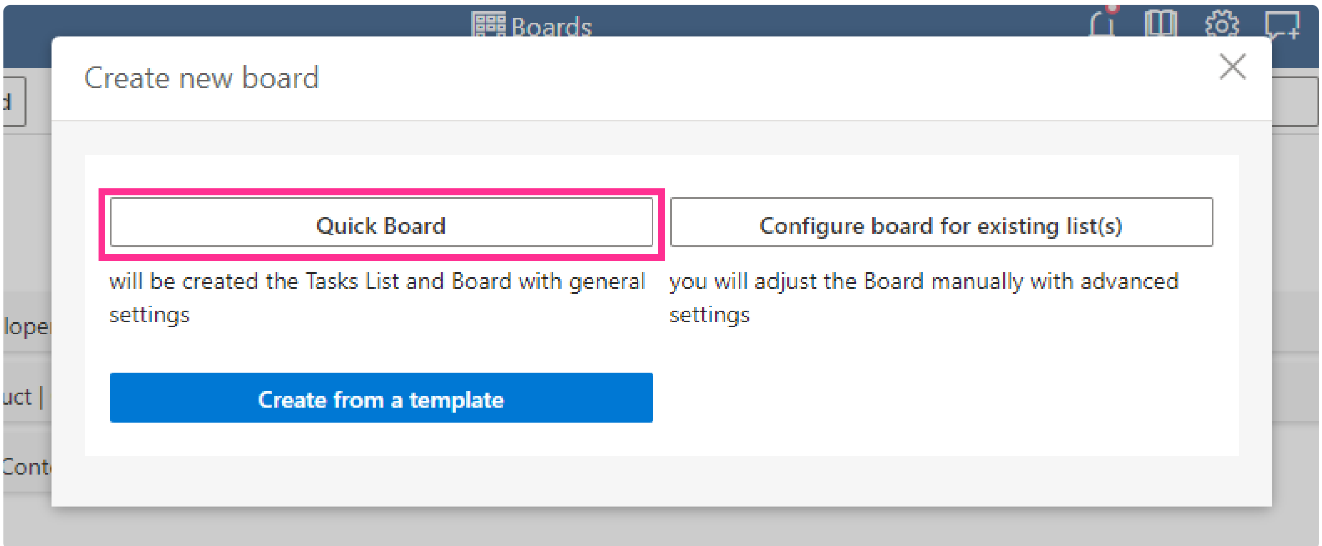
Use the quick board feature when you need to create a new board quickly. The SharePoint list with all the necessary fields and preferences will be created automatically.

To create a quick board, open the “**Boards**” list at the top of any kanban board and click “**Create new board**.”



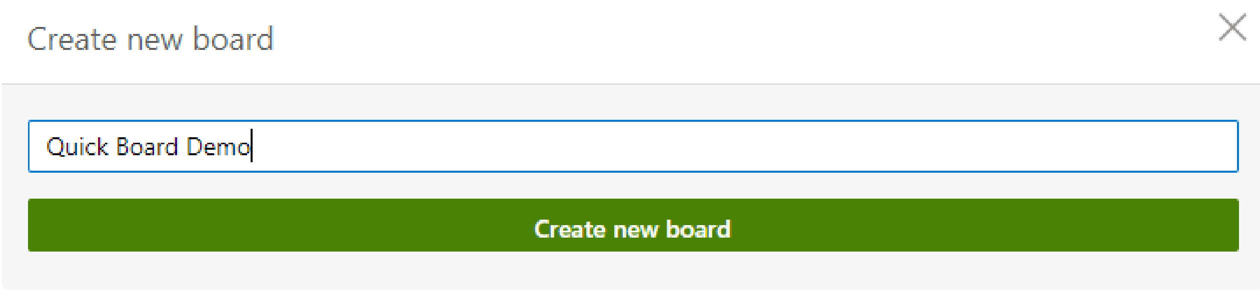
Create new board

Select the “**Quick Board**” option.



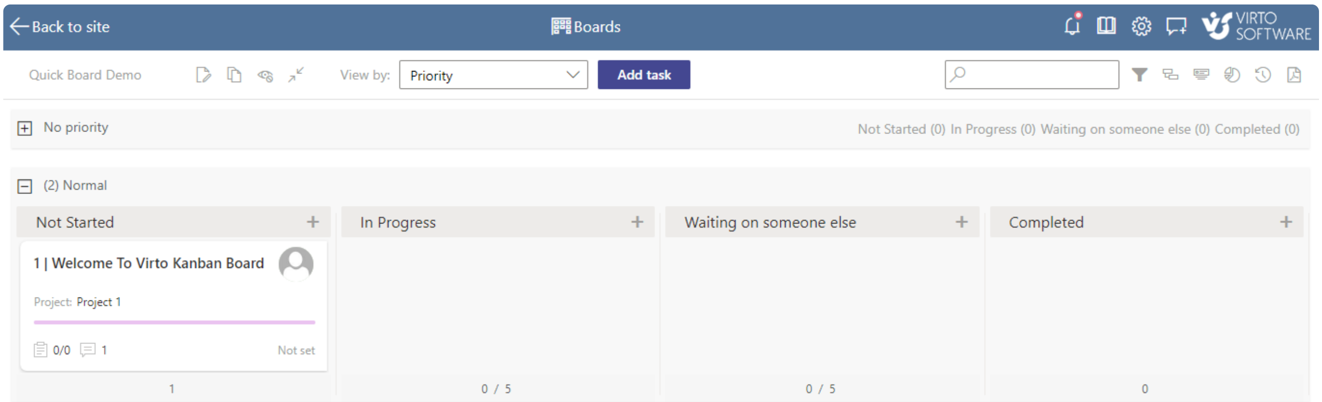
Quick board option

Specify the name for the new board, and click “**Create new board**.”



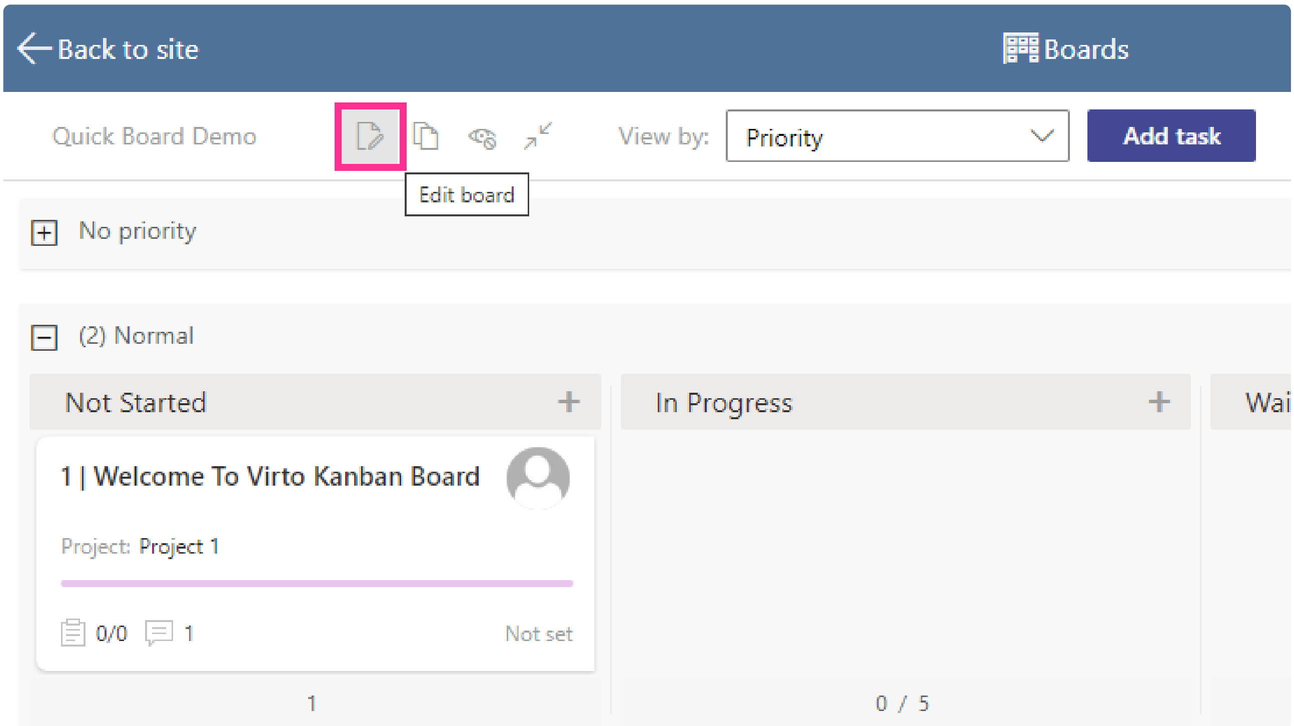
Specify the board name

A list with the same name as the new board will also be created. You can see the demo task and default set of columns on the newly created board.



New board

To change the board settings and adjust it as needed, click the edit board icon next to the board name.



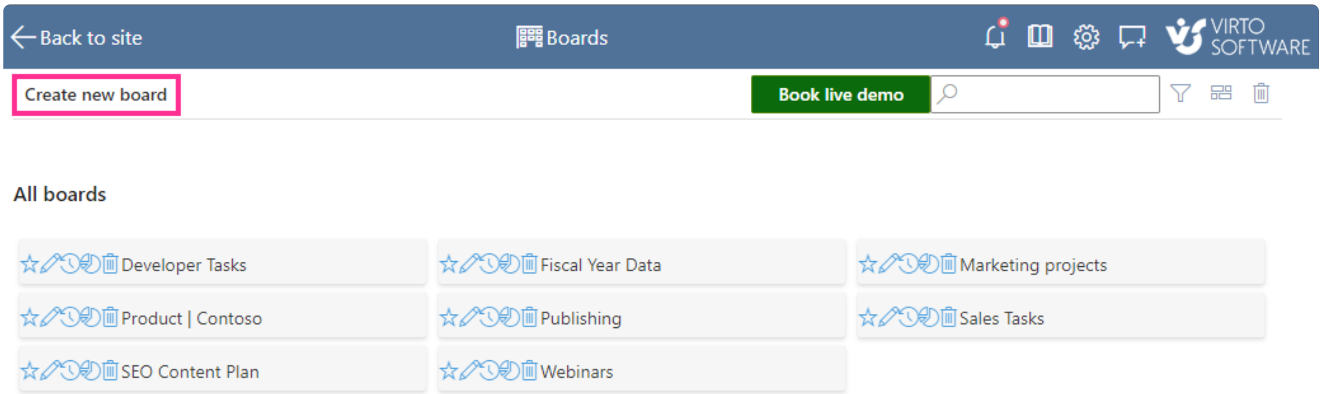
Edit board

See "List setup", "Board setup", "Card setup" and "Advanced setup" sections to find detailed information about Kanban board settings.

Quick boards have swimlanes organized by a project by default. You can change it by choosing the desired view from the "View by" drop down menu. Read more about how to work with swimlanes when creating a quick board in the **Swimlanes** *section.*

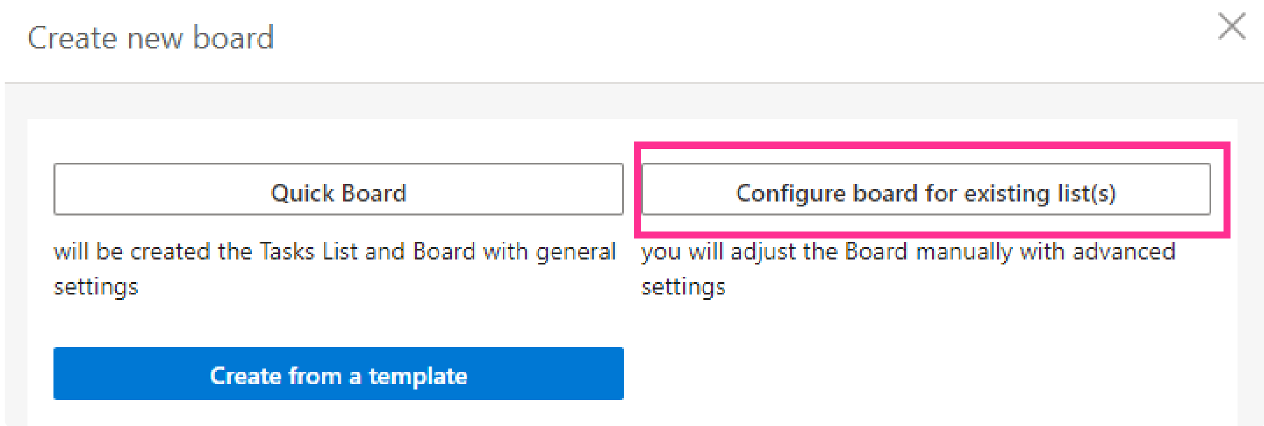
How to configure board for an existing list

You can use existing SharePoint lists to create a new board: open the “**Boards**” list on the top of any kanban board and click “**Create new board**.”



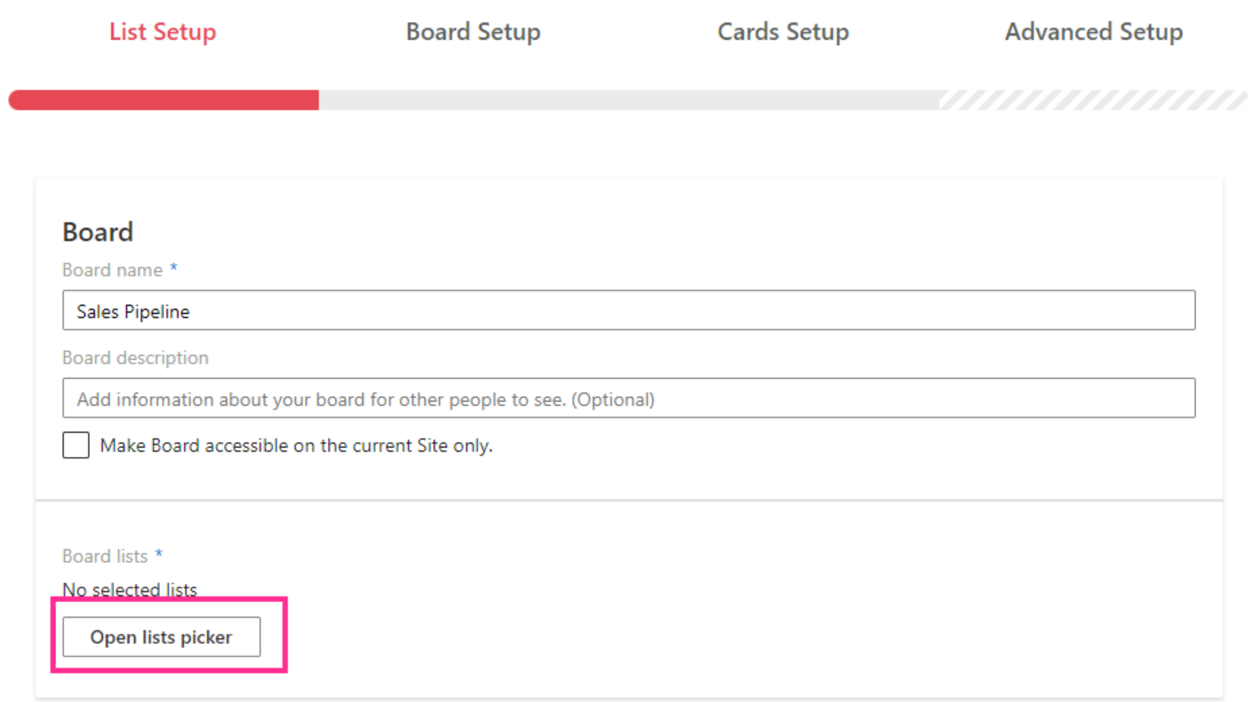
Create new board

Select the “Configure board for existing list(s)” option.



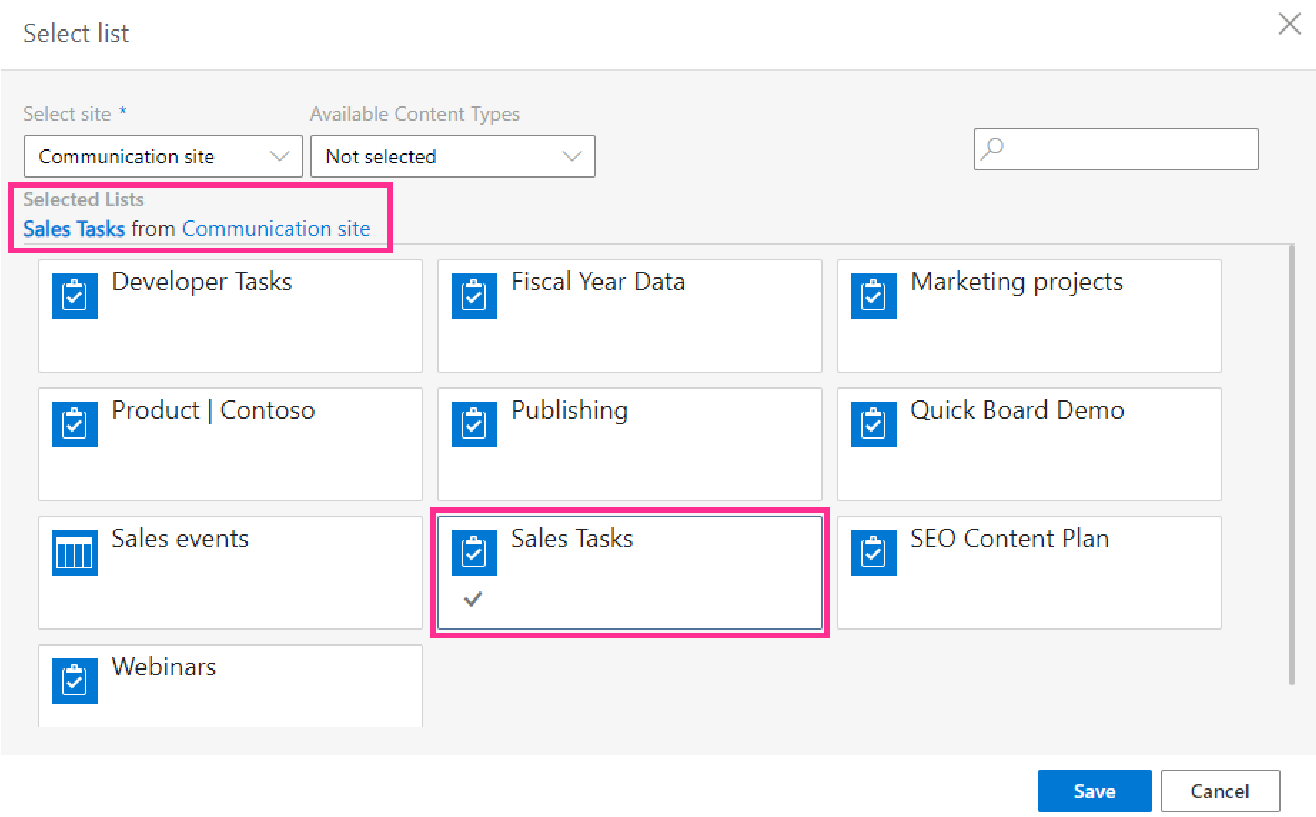
Configure board for existing list

Specify the board name and click “Open lists picker.”



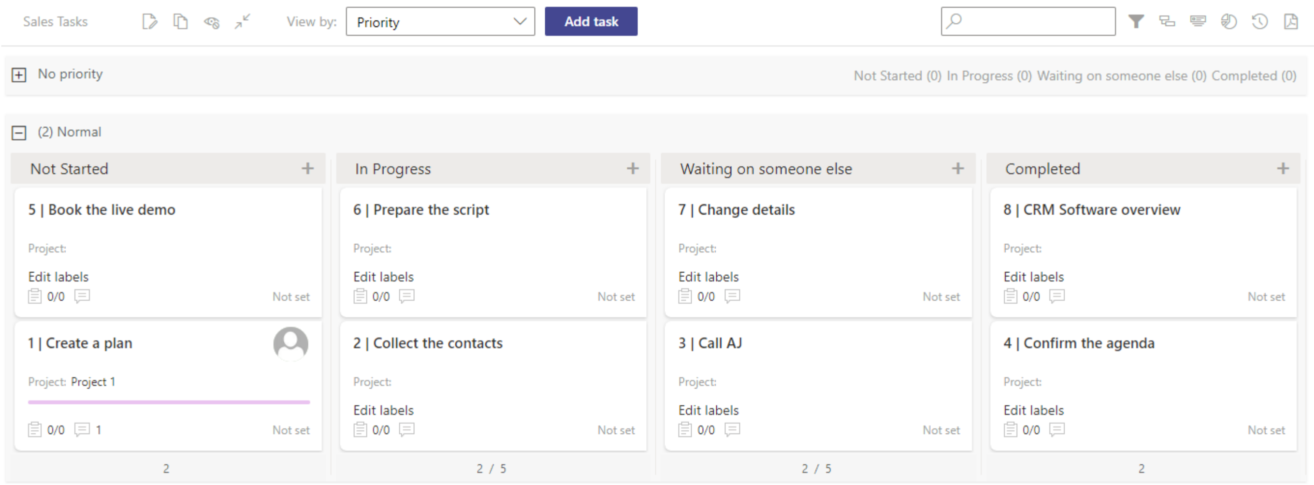
Open lists picker

Choose the list for your board and click "**Save**."



Choose a list

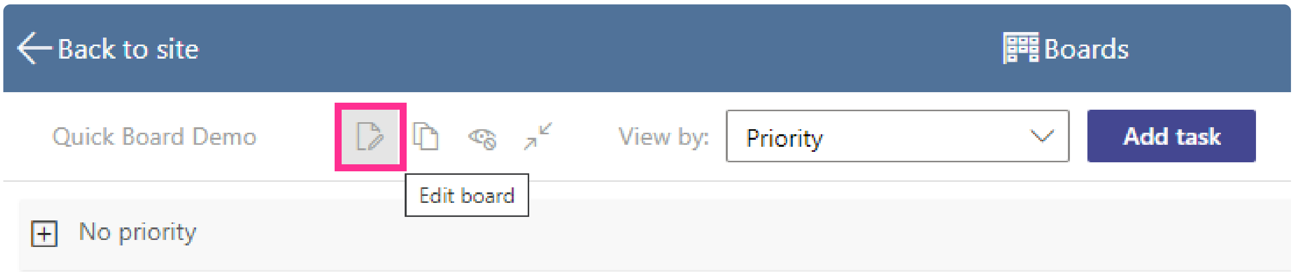
Then navigate between all the tabs and adjust the board as described in the "List setup", "Board setup", "Card setup," and "Advanced setup" sections.


Sales Tasks
View by:
Priority
Add task
No priority
Not Started (0) In Progress (0) Waiting on someone else (0) Completed (0)
(2) Normal
Not Started
In Progress
Waiting on someone else
Completed
5 | Book the live demo
Project:
Edit labels
0/0
Not set
6 | Prepare the script
Project:
Edit labels
0/0
Not set
7 | Change details
Project:
Edit labels
0/0
Not set
8 | CRM Software overview
Project:
Edit labels
0/0
Not set
1 | Create a plan
Project: Project 1
0/0
1
Not set
2 | Collect the contacts
Project:
Edit labels
0/0
Not set
3 | Call AJ
Project:
Edit labels
0/0
Not set
4 | Confirm the agenda
Project:
Edit labels
0/0
Not set
2
2 / 5
2 / 5
2

New board

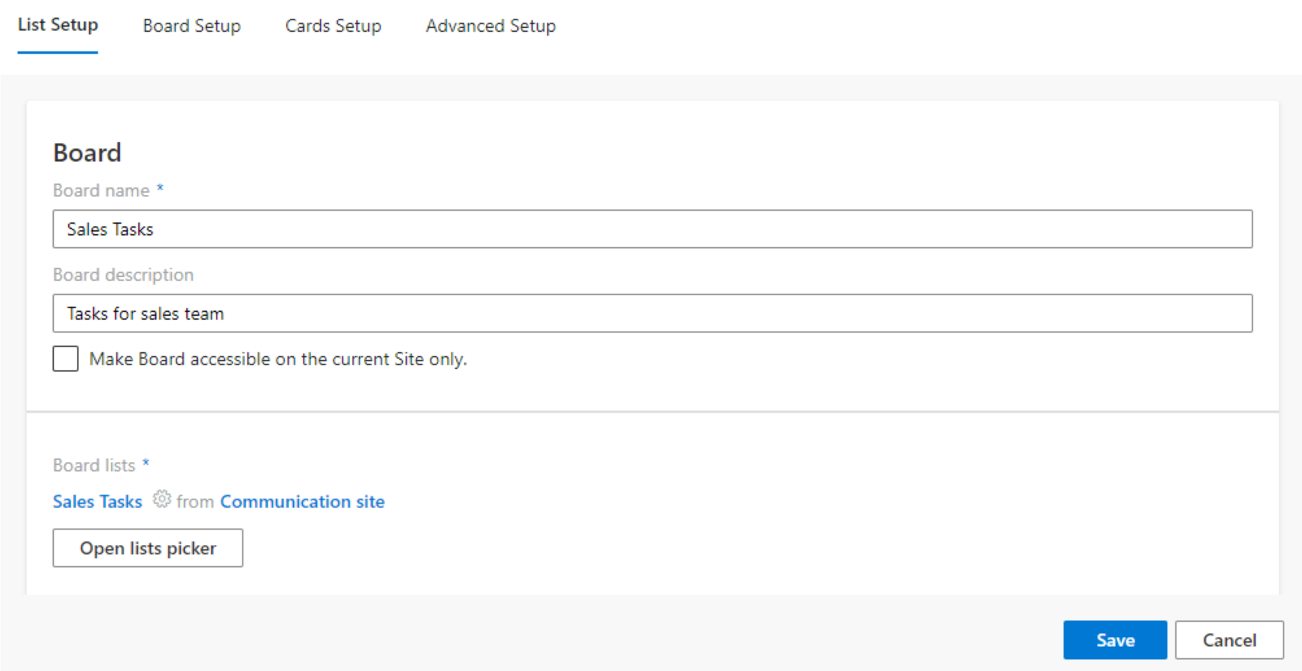
List setup

This is the first tab to adjust if you create a new board for an existing list. To change the settings for a current board, click the edit board icon next to its name.



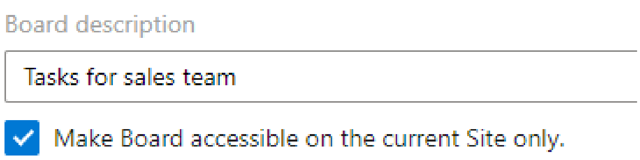
Edit board

In the “**List Setup**” tab, you can change the board name, add a description (optional), and choose a SharePoint list (or multiple lists) from a site collection. This list contains the data that will display on the kanban board.



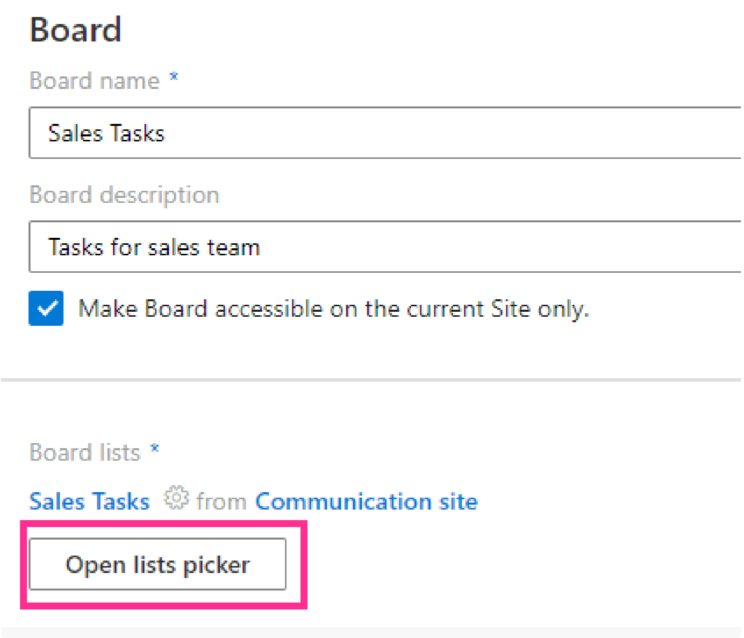
List setup

You can make the board accessible only on the current SharePoint site.



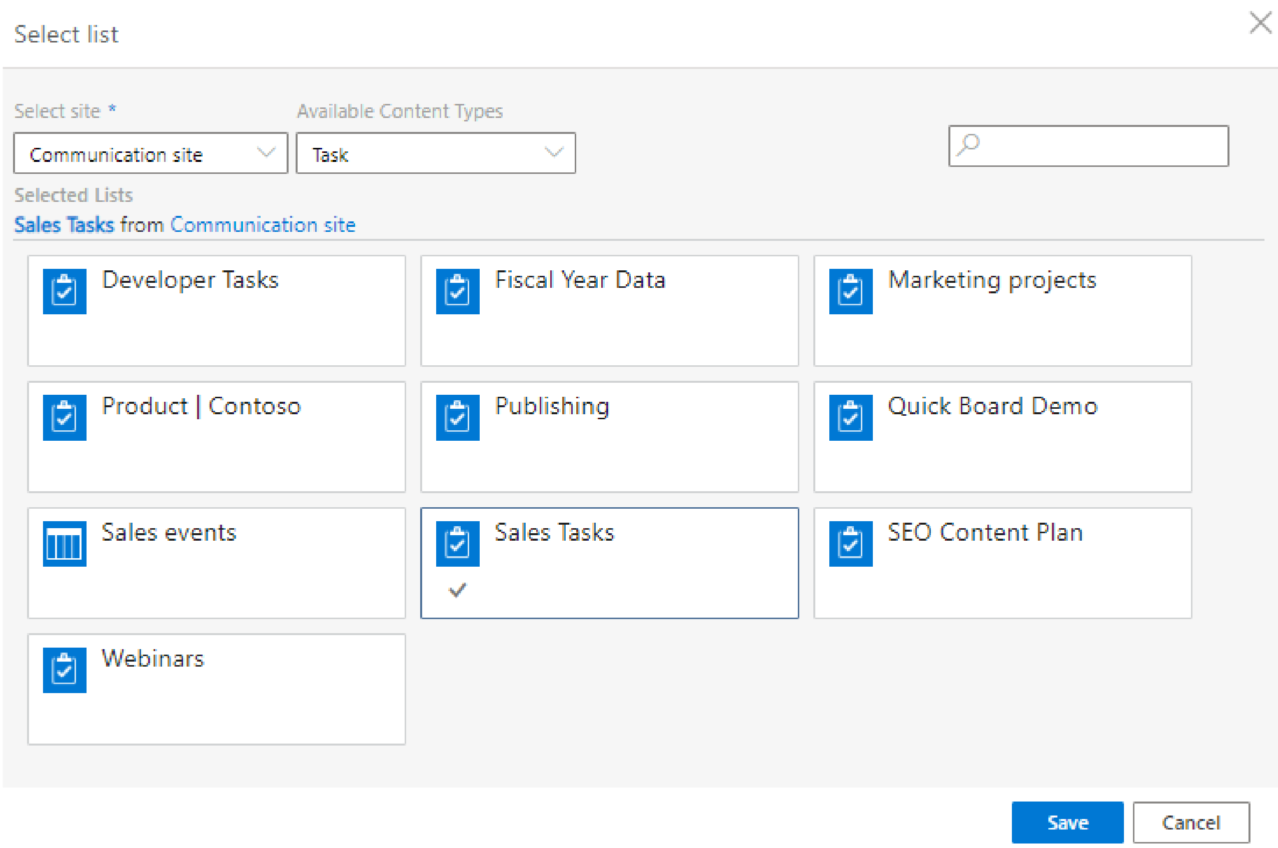
Make the board accessible only for the current site

To choose a list or multiple lists, click "**Open lists picker**."



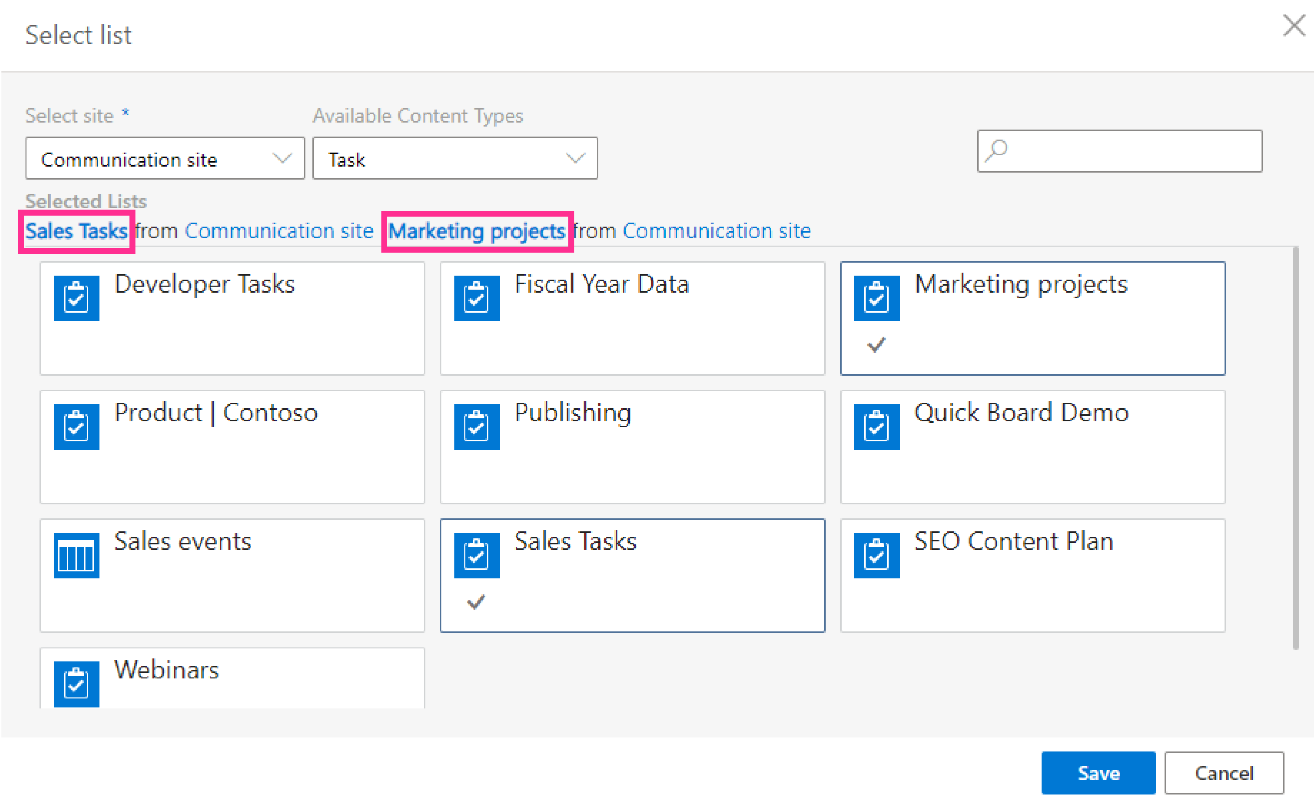
Lists picker

In the lists picker, choose the site collection and then the list(s).



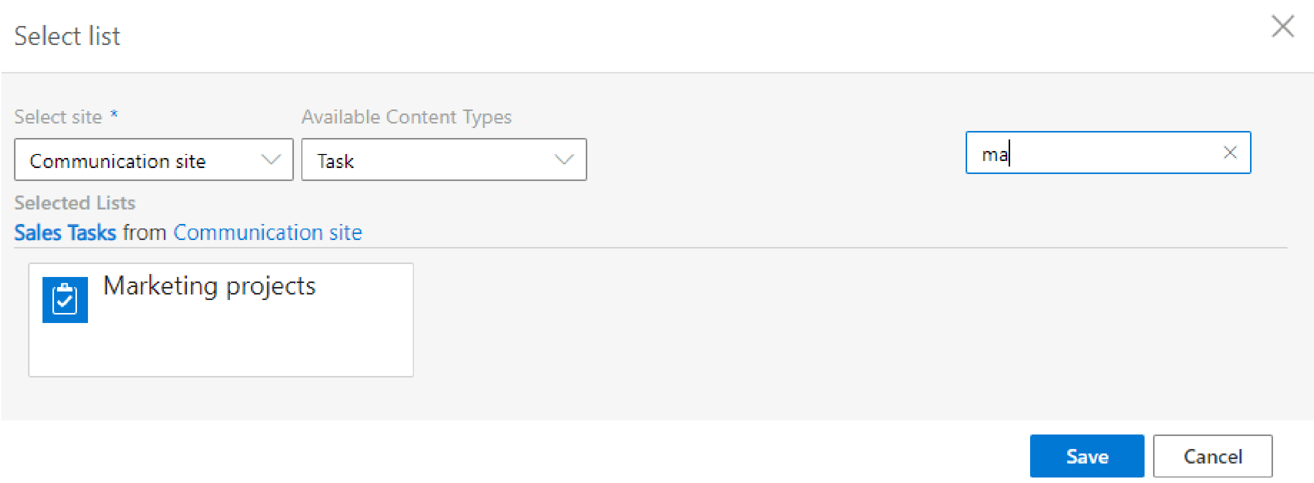
Lists picker

Pick more than one list if you need to combine them into a single board. The chosen lists are clickable: click them to view the list in Sharepoint if you need to.



Pick multiple lists

Use the search string if you cannot find the list you need.



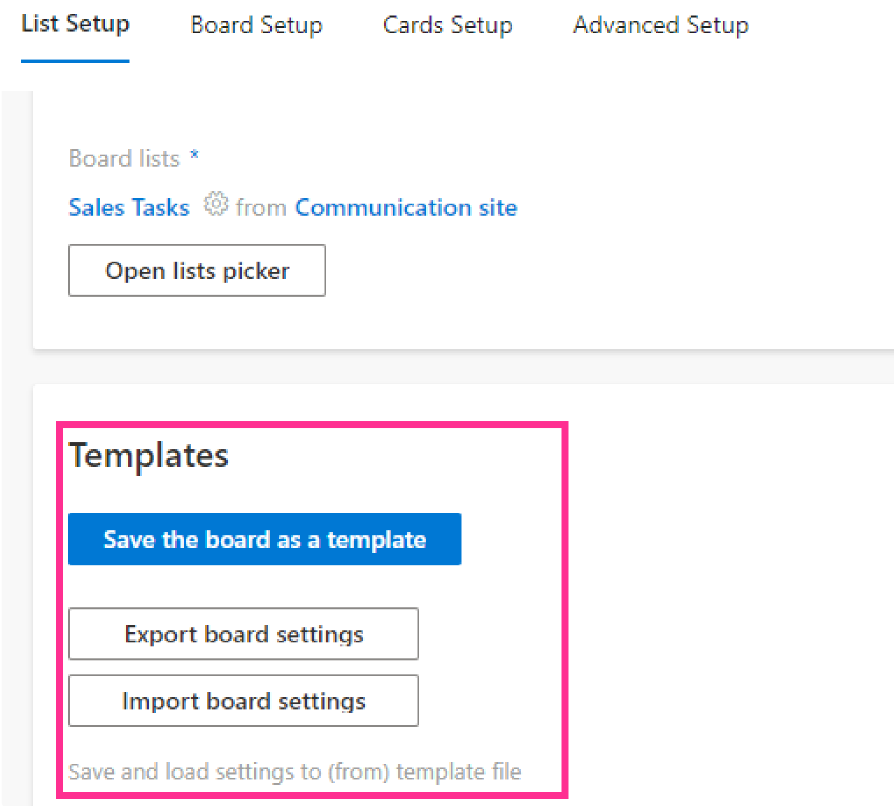
Search string

The "**List setup**" tab also contains the "**Board templates**" block described in the "**Board templates**" section.

Save the settings before you move to another tab.

Board templates

Kanban Board Pro by Virto for Office 365 supports creating boards from templates. Open the "**List Setup**" tab in the board settings (click the edit board icon next to board name to access the settings) and scroll down to the "**Templates**" block.

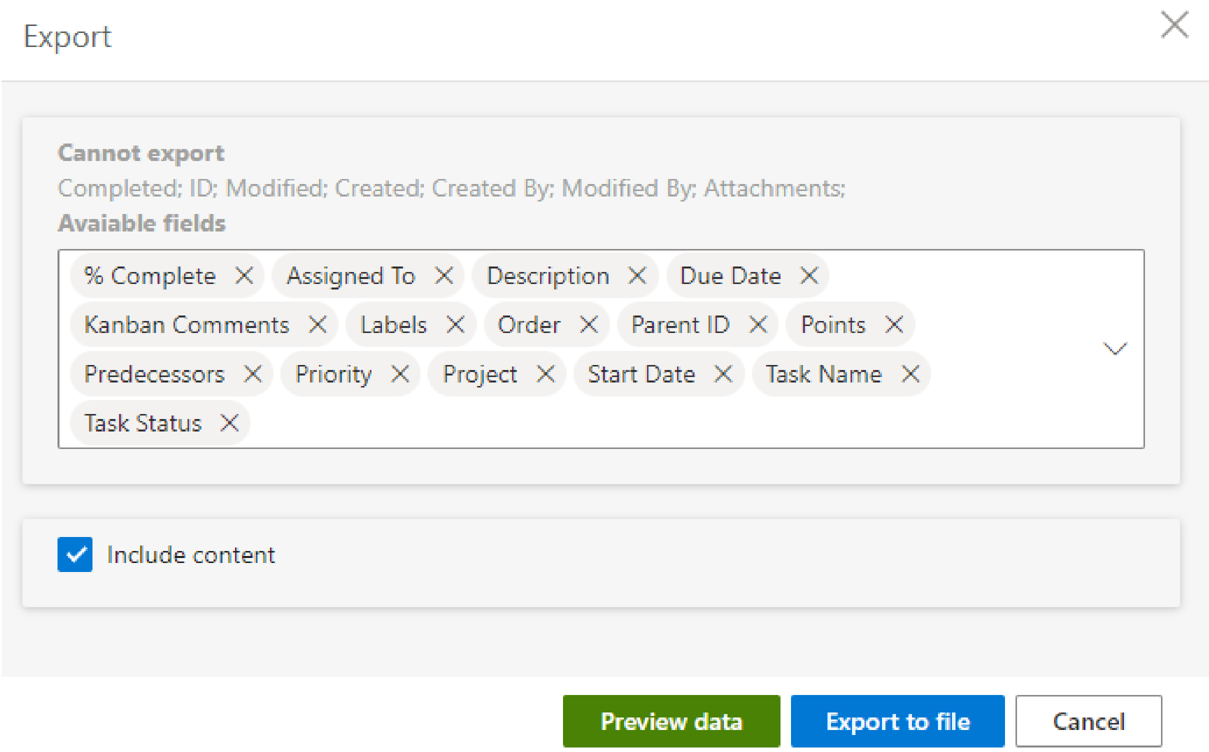


Templates block

There are three options for using board templates:

- **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** (select a file from your disc to load previously saved settings)

To save the current board as a template, click "**Save the board as a template.**" Select the fields you would like to export and pay close attention to the fields that are not included. If you check the "**Include content**" box, the board template will save the content as well as list fields and structure.

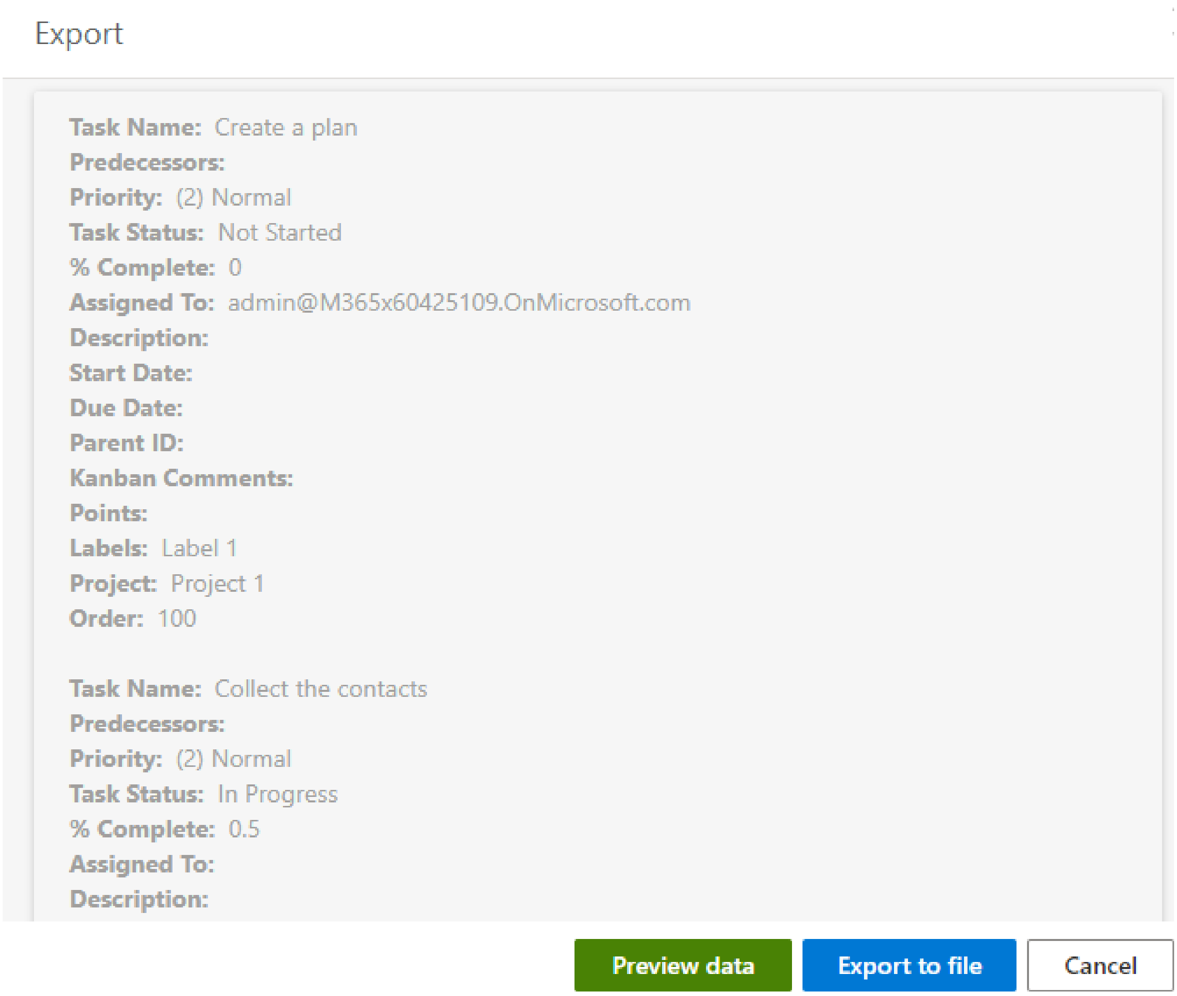


Save current board as a template

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** in the template. For this purpose, subtasks are counted as separate cards.
4. You **can exclude the content** and only import list fields and structure.

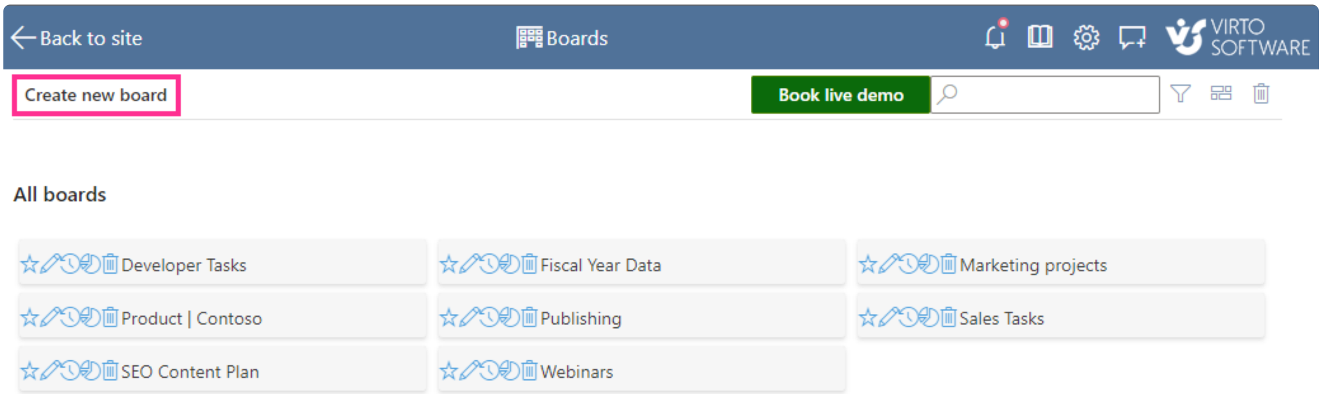
Make a preview before you complete the export by clicking “**Preview data**”.



Preview data

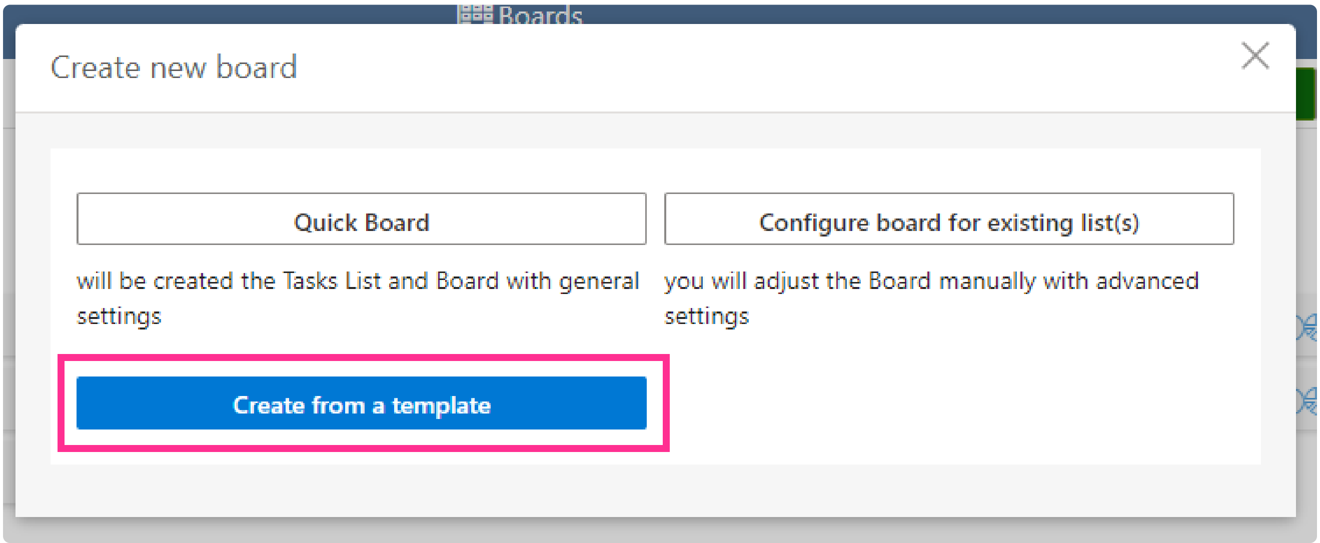
Finally, save the generated file to your disc for future use by clicking "**Export to file**."

You also can create a new board from a template. Start creating a new board and click “**Create new board**” on the boards page.



Create new board

Now click “**Create from a template**.”



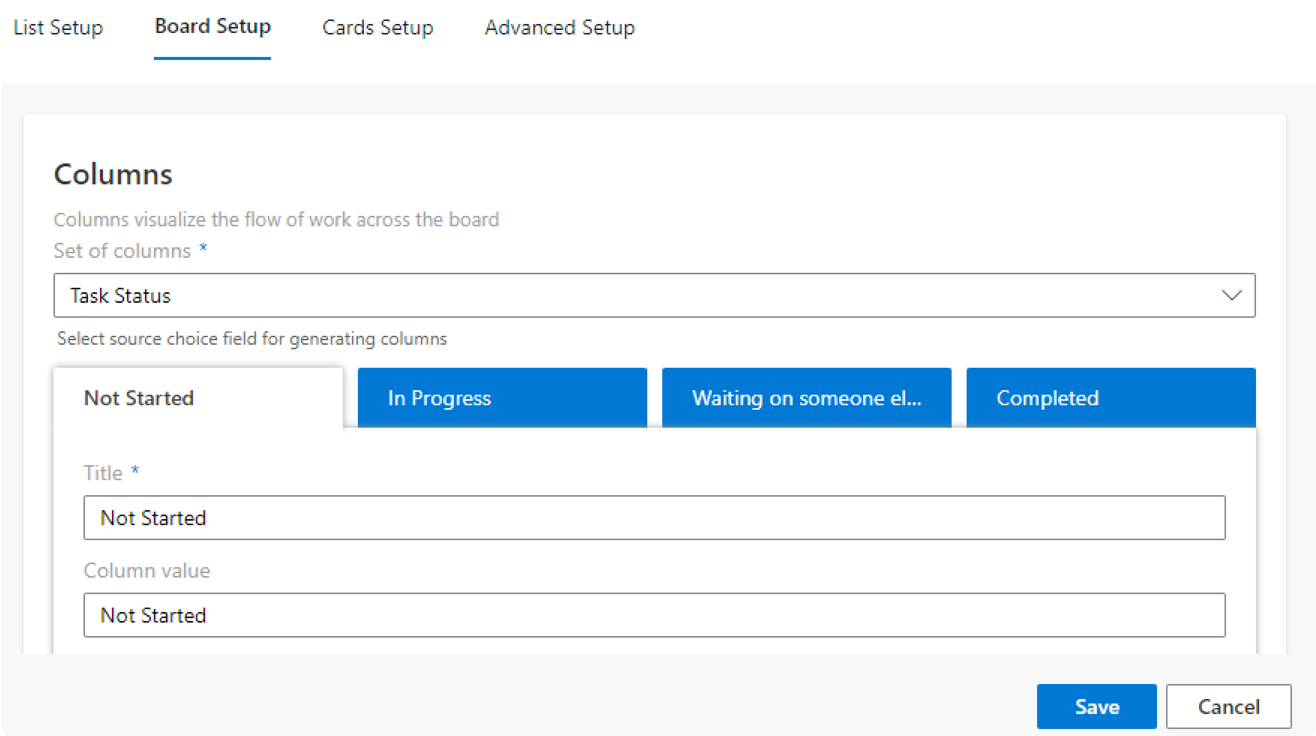
Create from a template

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

Once you create a board based on a template, you can customize 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 previously saved files to quickly add a new board.

Board setup

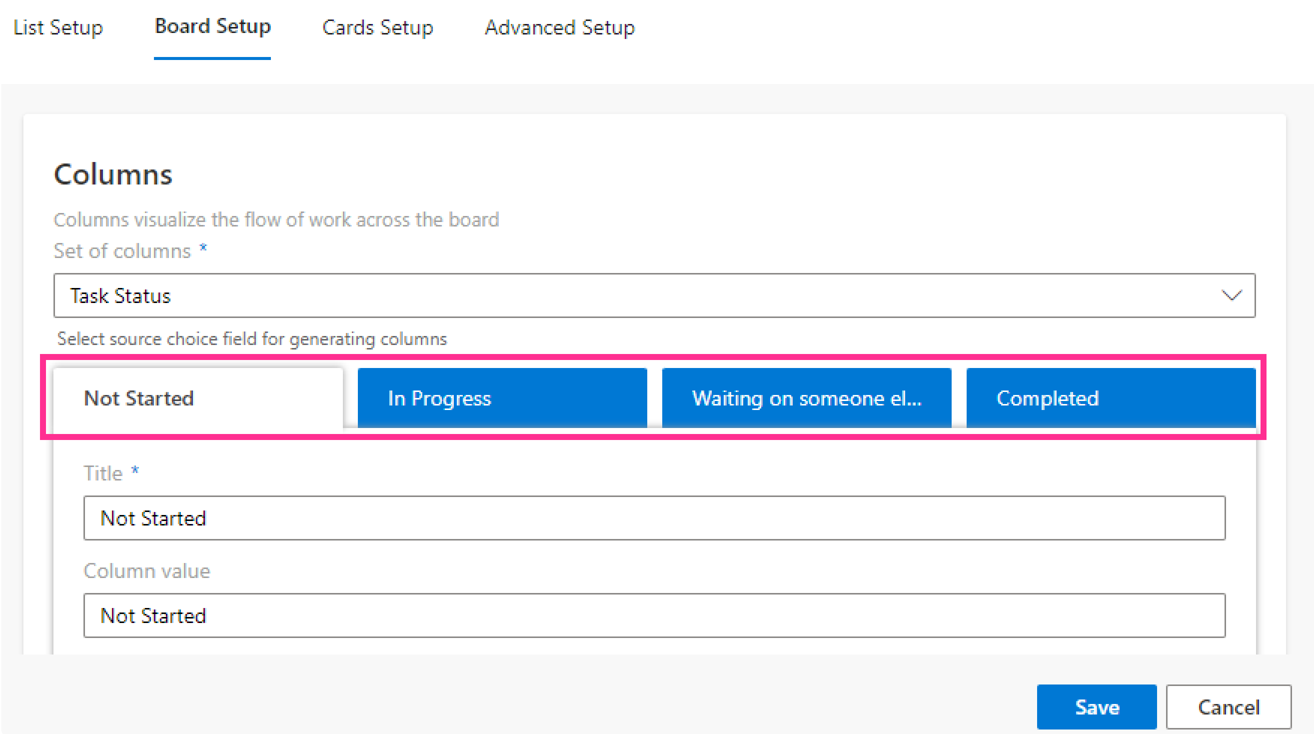
The board setup tab contains basic board settings. Continue adjusting your new board or change the current board settings here.



Board setup

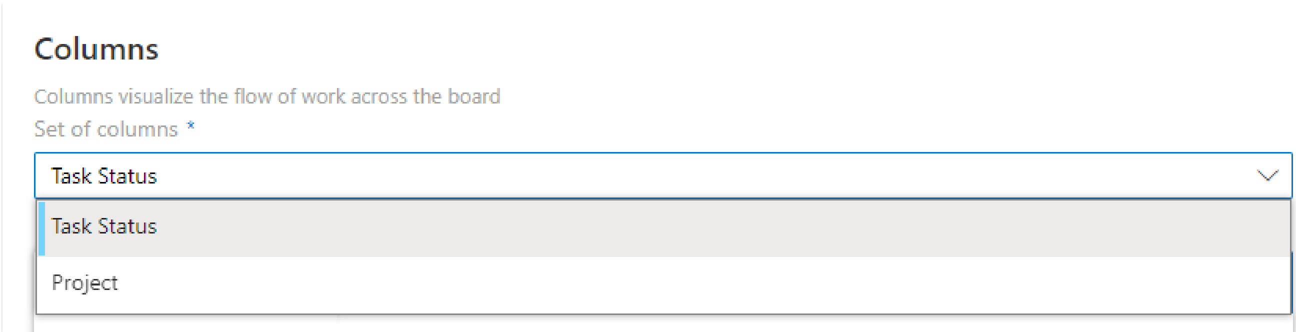
Columns

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



Column fields

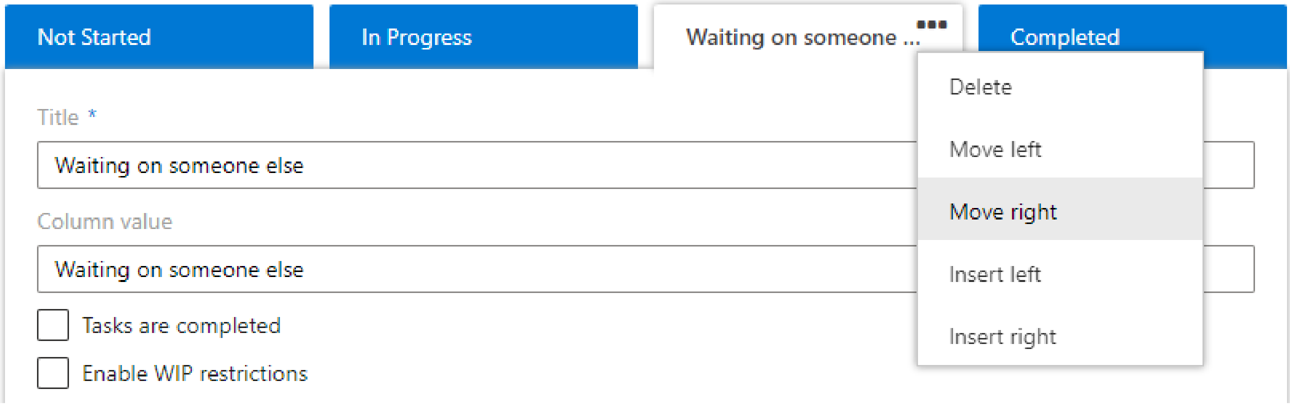
You can open the “**Set of columns**” drop-down list, which will be used for generating columns for your kanban board. The field you select must be of the “choice” type (providing a menu to choose from).



Set of columns

When you have assigned a field for columns, all choice values (that is, all menu options) from this field will be displayed as columns. You can now choose the exact columns that will be displayed on the board.

Click “…” next to a column name to define the position of the column (by moving it left or right) or delete it.



Move columns

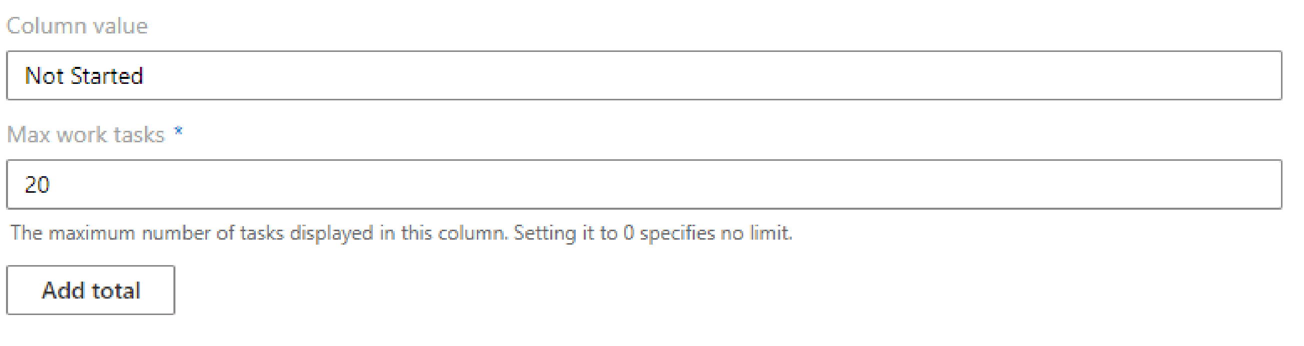
By default, all the available columns are added to the board. The “**Insert left**” and **“Insert right**” options from this drop-down list allow you to re-add the previously deleted columns.

You can specify a custom title for each column.

> The column name will stay the same in the list.

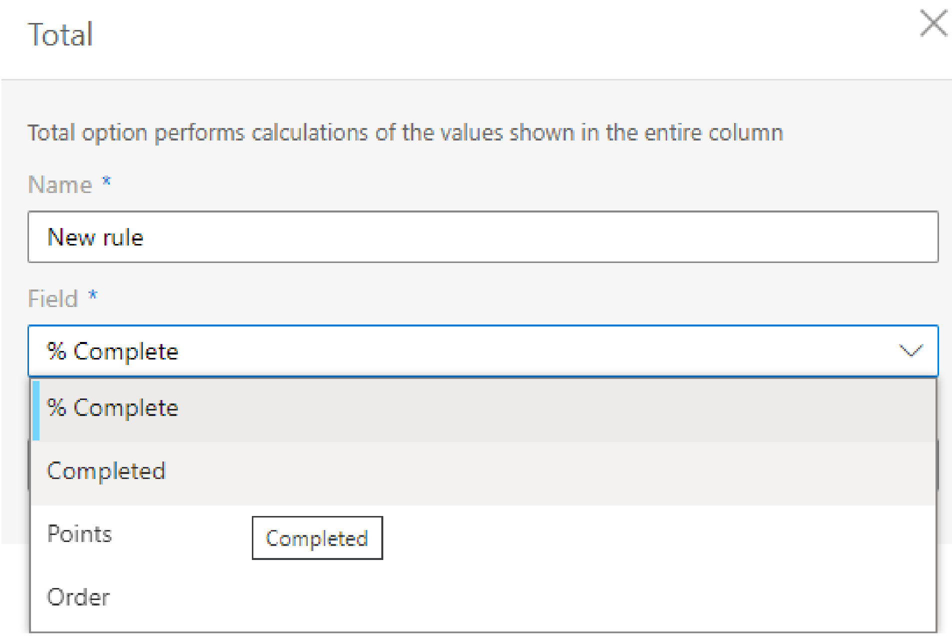
Change column name

Additionally, you can set the maximum number of tasks permitted in a column.



Maximum tasks

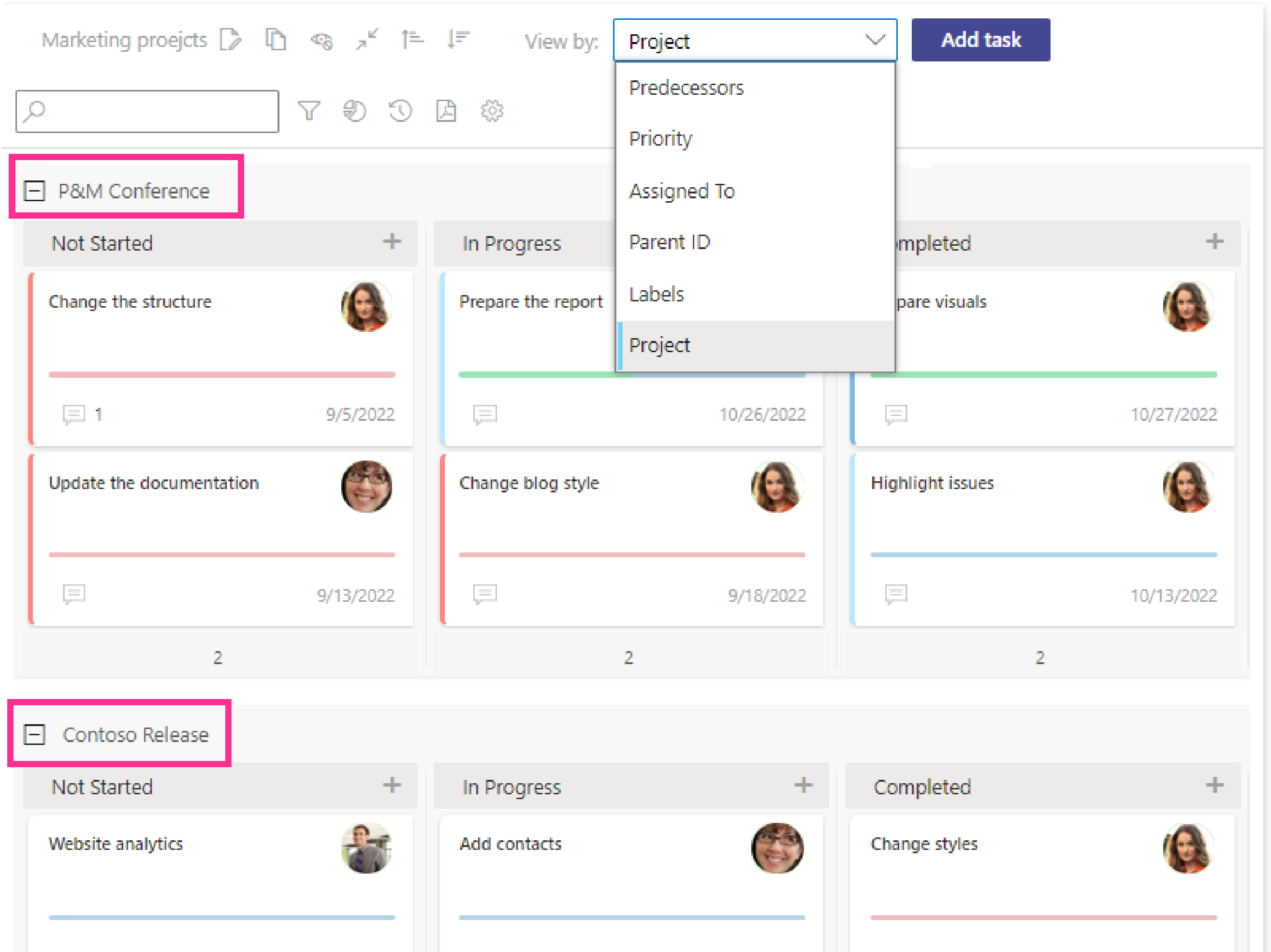
If you click "**Add total**," you can create rules for counting tasks in a column.



Calculation of values in a column

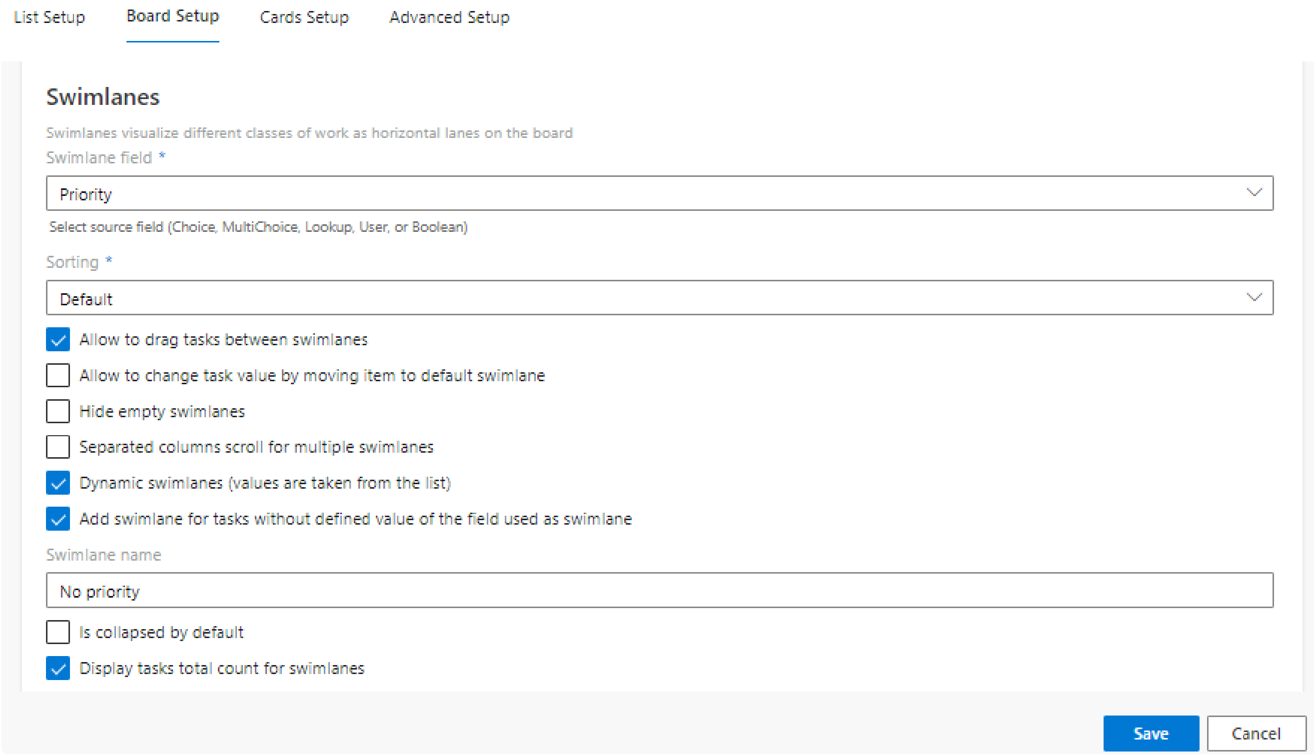
Swimlanes

Swimlanes visualize different classes of work as horizontal lanes on the board; you can group tasks by a chosen swimlane field. For example, you can group tasks by assignee, project, department, or priority. You can change the swimlane field directly on the board.



Swimlanes

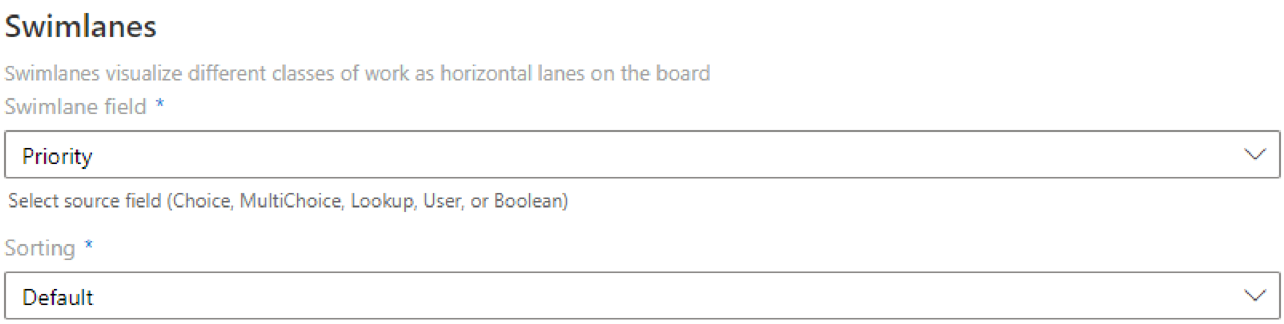
The swimlane settings are also found in the "**Board setup**" tab.



Swimlae settings

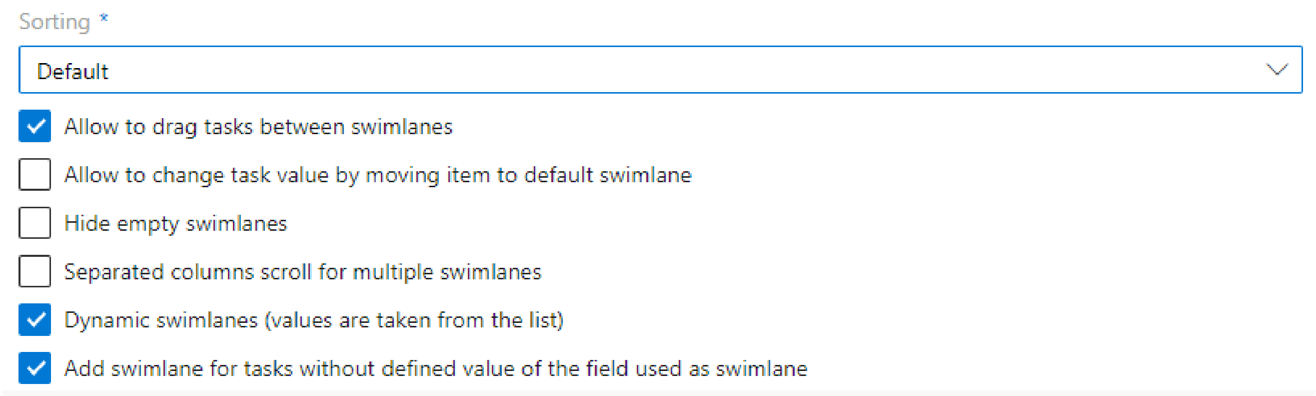
Any tasks that do not fit within other swimlanes' conditions are automatically placed in default swimlane.

> If the list field contains multiple values, for example, **choice, multichoice, user, lookup, boolean, etc.**, it can be used as a swimlane field.



Swimlane field

You can define the default sorting for swimlanes and apply various preferences with checkboxes.



Swimlane preferences

The “**Allow to drag tasks between swimlanes**” checkbox allows you to move a 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.

The “**Allow to change task value by moving item to default swimlane**” checkbox allows you to change a task's value after you move it to the default swimlane. If this checkbox is selected, you can choose a new value after moving the task or leave the field.

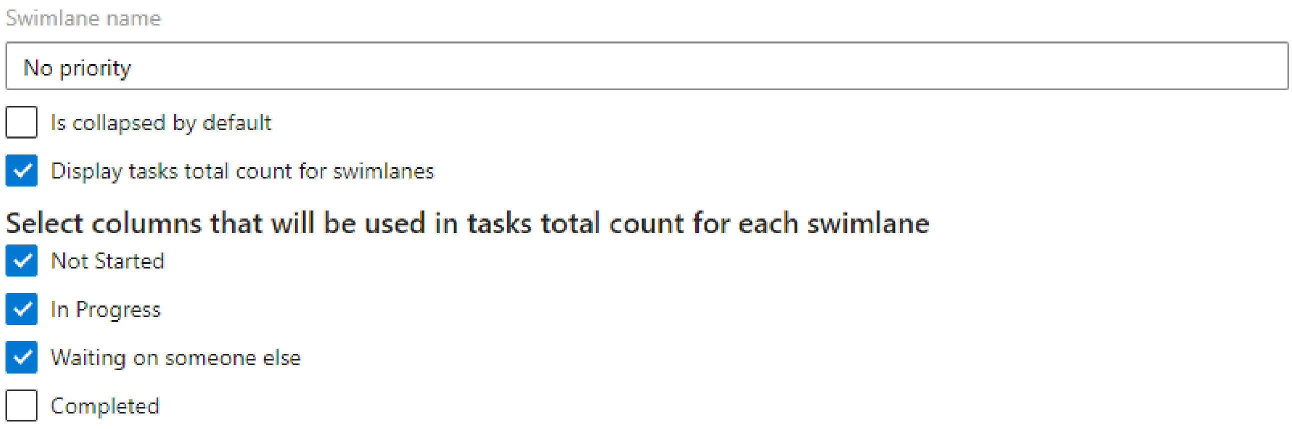
The “**Hide empty swimlanes**” option allows you to hide swimlanes that don’t contain any tasks. You can show them again using the button on the board header.

The “**Separated columns scroll for multiple swimlanes**” option allows you to scroll through the columns of multiple swimlanes separately.

If you tick the 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 won’t need to change the swimlanes settings in Kanban Board—the swimlanes will be added or deleted automatically. If you always use a special set of swimlanes for this board, you can disable this option and customize the swimlanes in more flexible way.

The “**Add swimlane for tasks without defined value of the field used as swimlane**” option option adds a default swimlane for the tasks with values that don’t fit within the current swimlanes (for example, if their value field is empty). These tasks will be placed within this default swimlane.

It is also possible to rename the default swimlane, collapse it by default, and select columns used in a total count.

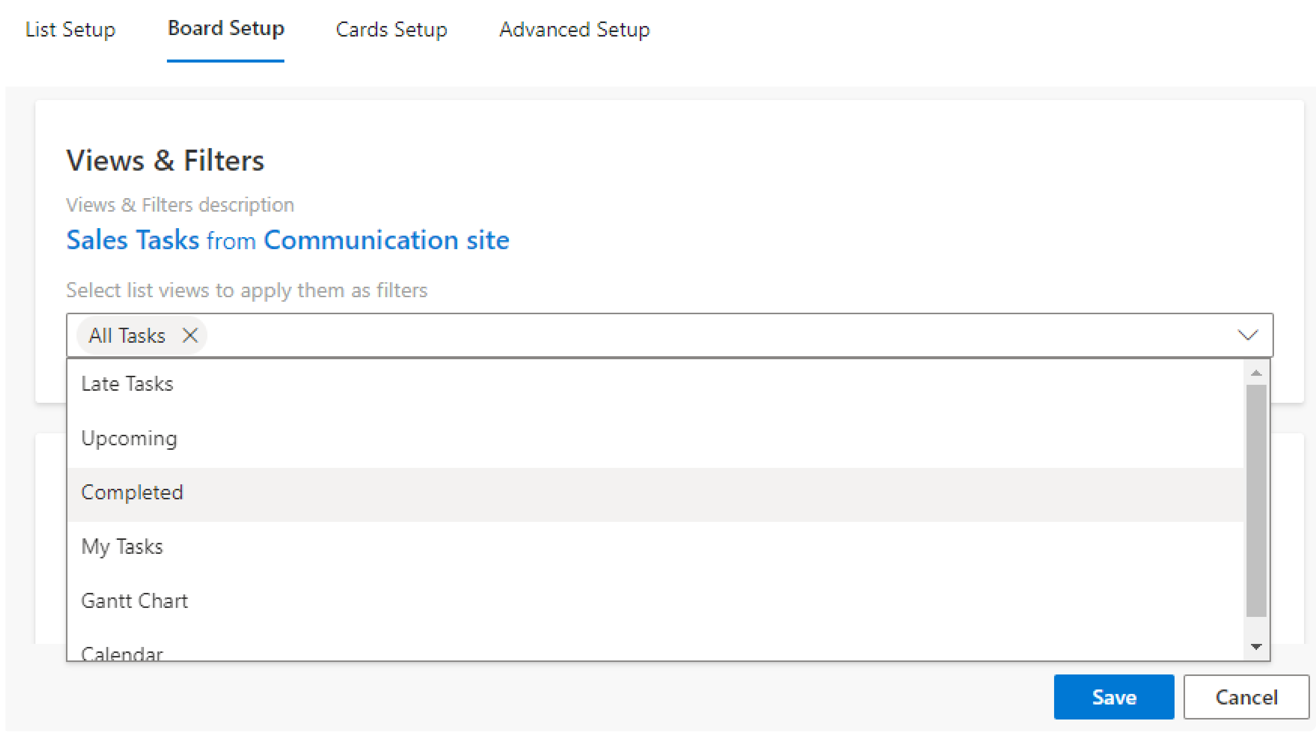


Swimlane settings

The “**Display tasks total count for swimlanes**” option allows you to count the number of tasks in selected swimlane columns. You can tick the required columns to use them for calculating the total number of tasks.

Views and filters

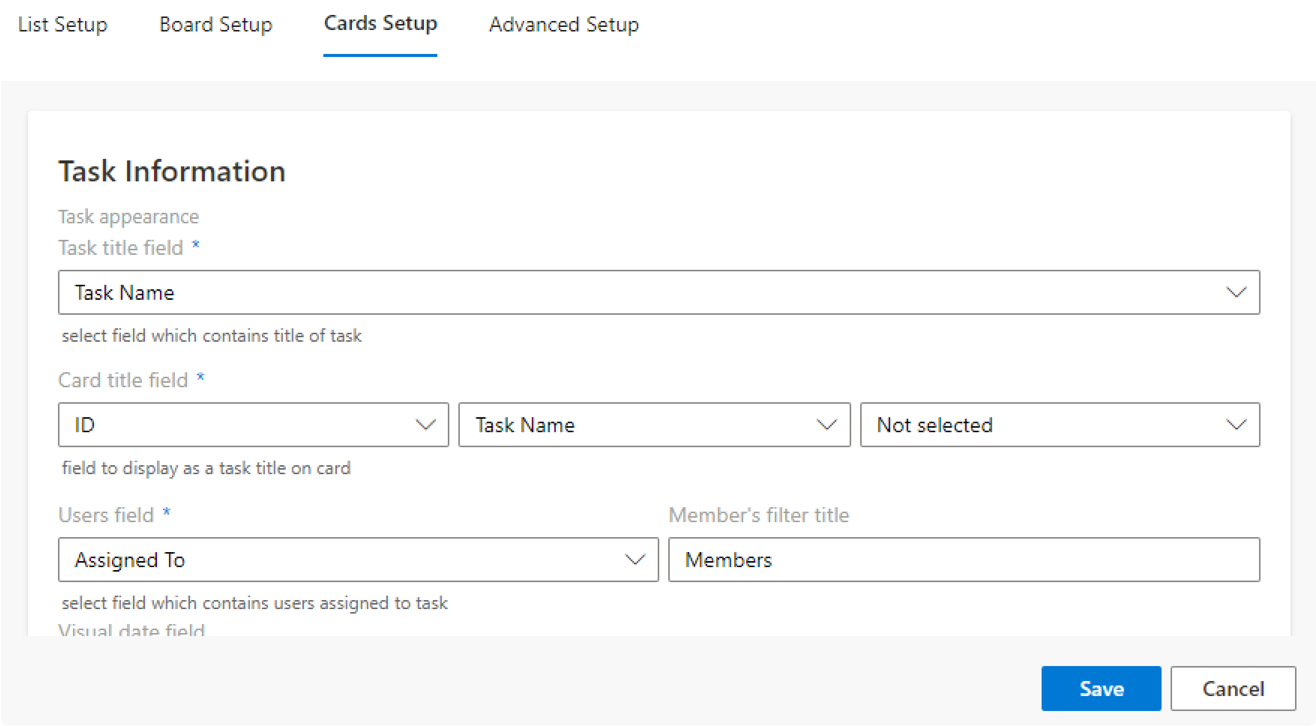
You can choose list views for each list to filter tasks on the board.



List views

Card setup

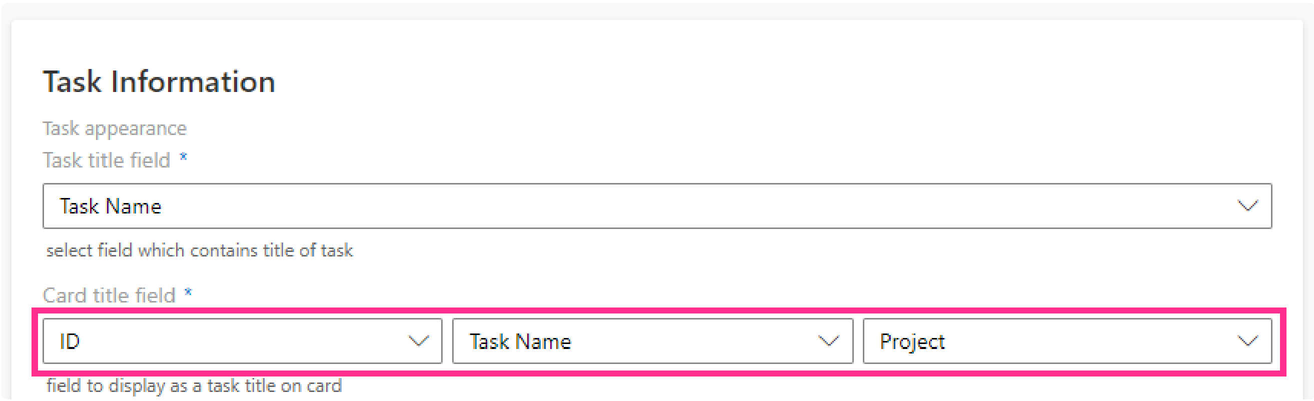
Continue your board adjustment in the “**Cards Setup**” tab. All the settings related to kanban cards and create or edit forms are found here.



Task information

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

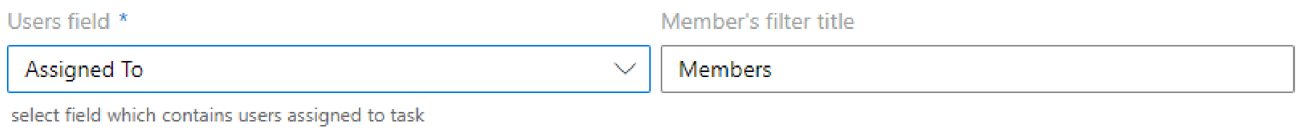
Choose a field to be displayed as a task title. You can add any list field to display it on the board (for example, task or project name).



Card title fields

A card title may contain up to three list fields.

Then select the field that contains the users assigned to the task.



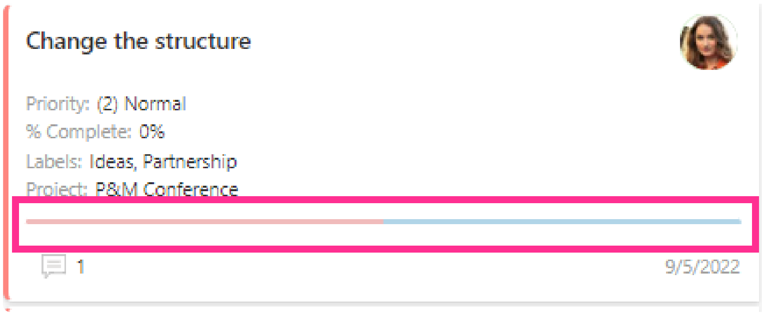
Users field

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

Due date

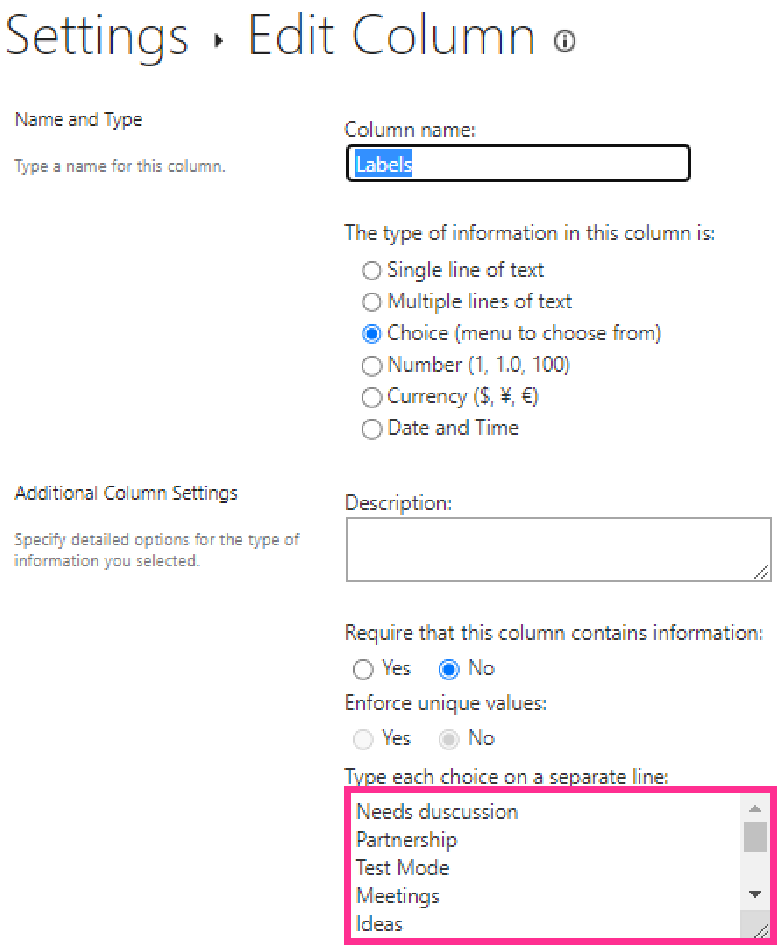
Labels

Kanban Board’s labels are color-coded tags on kanban cards.



Labels

Label values are taken from a custom multi-choice column added to your kanban list. If you navigate to a list (“**List settings**”), you can see these fields and their values



List settings

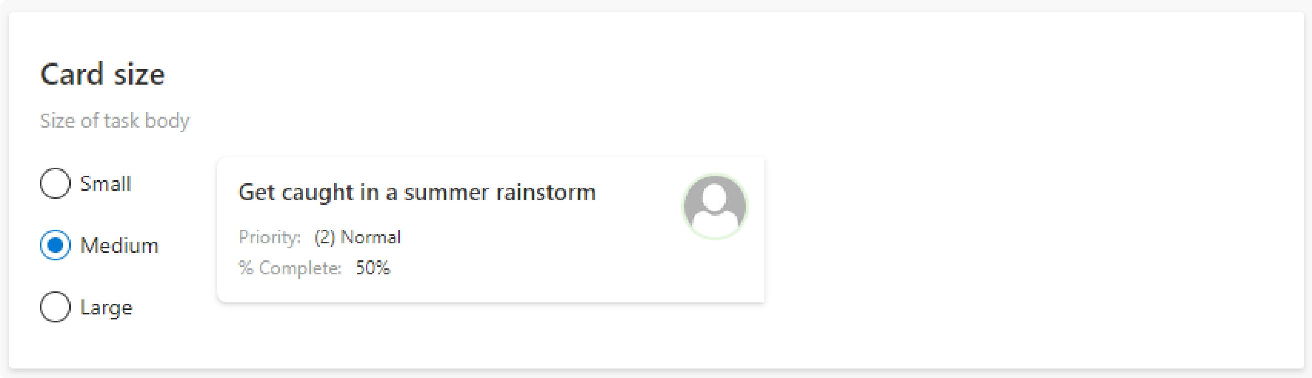
You don’t have to work with the source SharePoint list settings in Kanban Board Pro to adjust labels. Simply specify label names and choose appropriate colors for them.


Edit labels
Ideas
#eac3f0
Need conference room
Project work
Enter label name...
Add
Save
Cancel

Labels

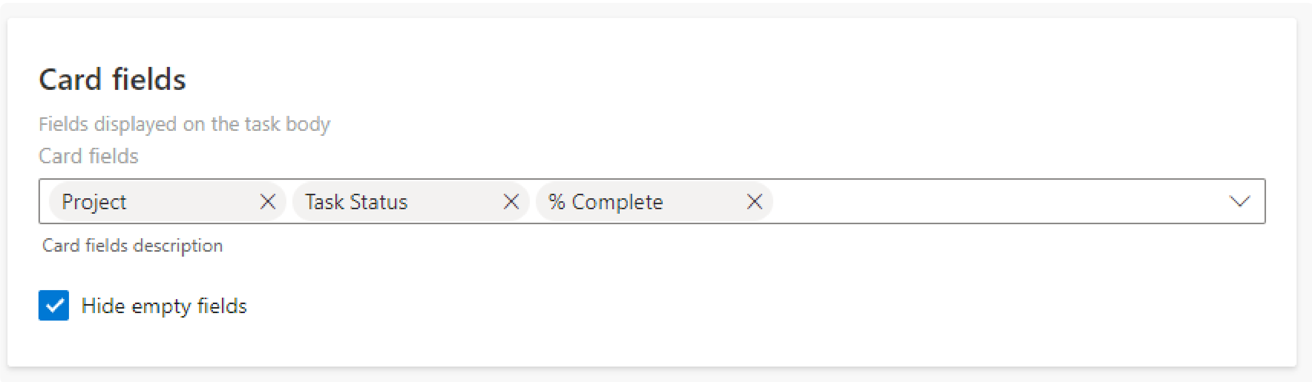
Appearance

The size of the tasks on your board can be adjusted to small, medium, or large to match the board design.



Crad size

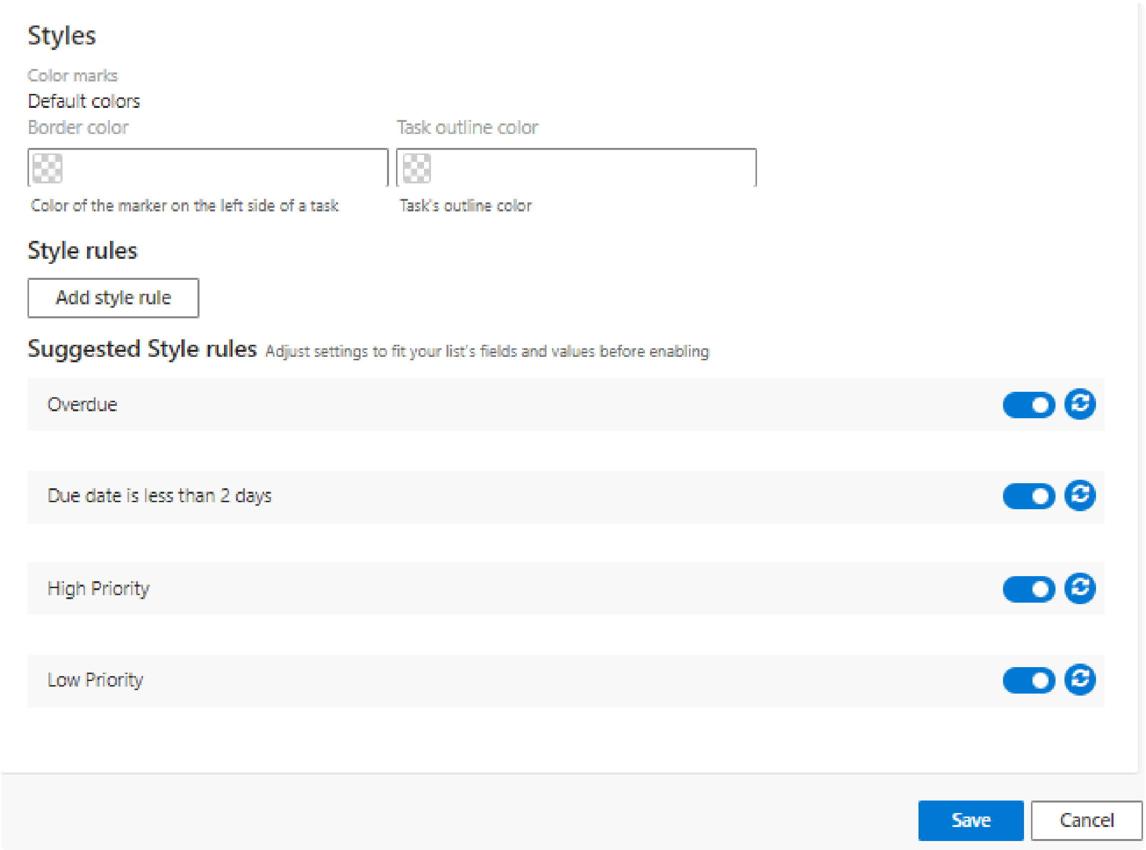
You can choose which fields to show on every card in the card field settings. Tick the “**Hide empty fields**” checkbox to hide fields with no values.



Card fields

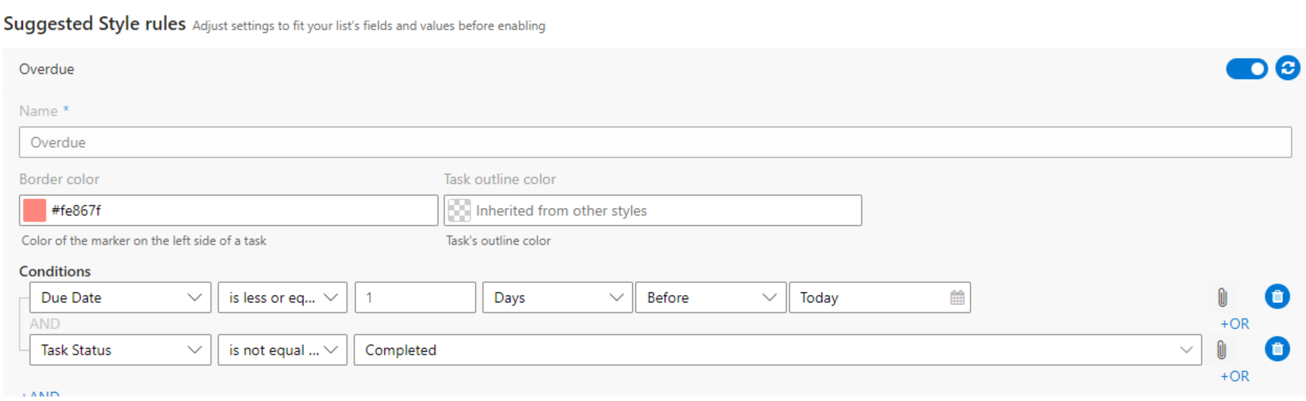
Styles

You can specify the body color, border color, and font color for your task cards. There are default styles provided by Kanban Board Pro, but you can create your own custom styles as well.



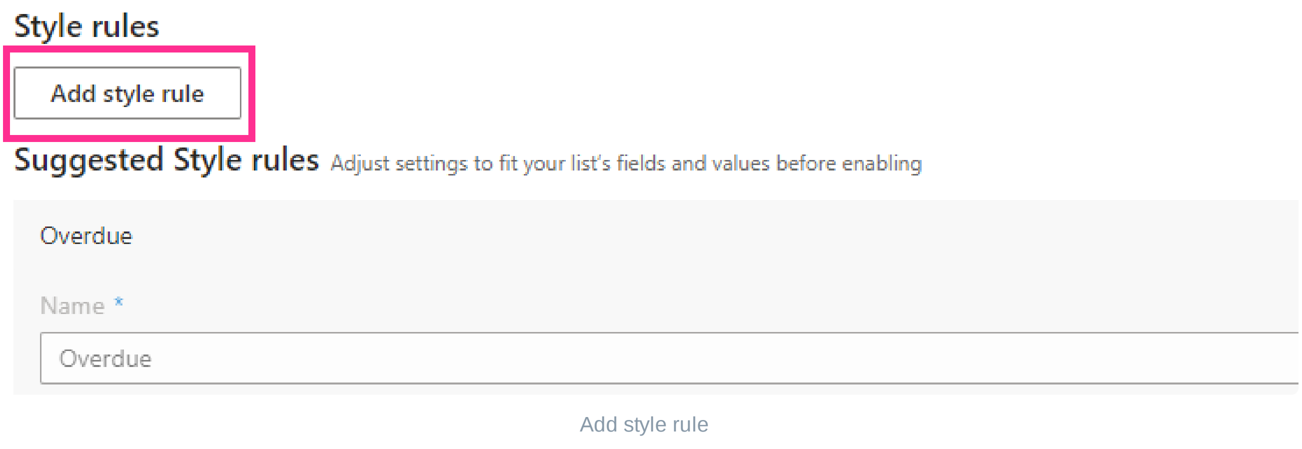
Styles

You can set custom conditions and color-code tasks according to condition rules. There are four suggested style rules already set up for you. You can deactivate these style rules or adjust them (use the reset button to apply the new rule).



Default style view

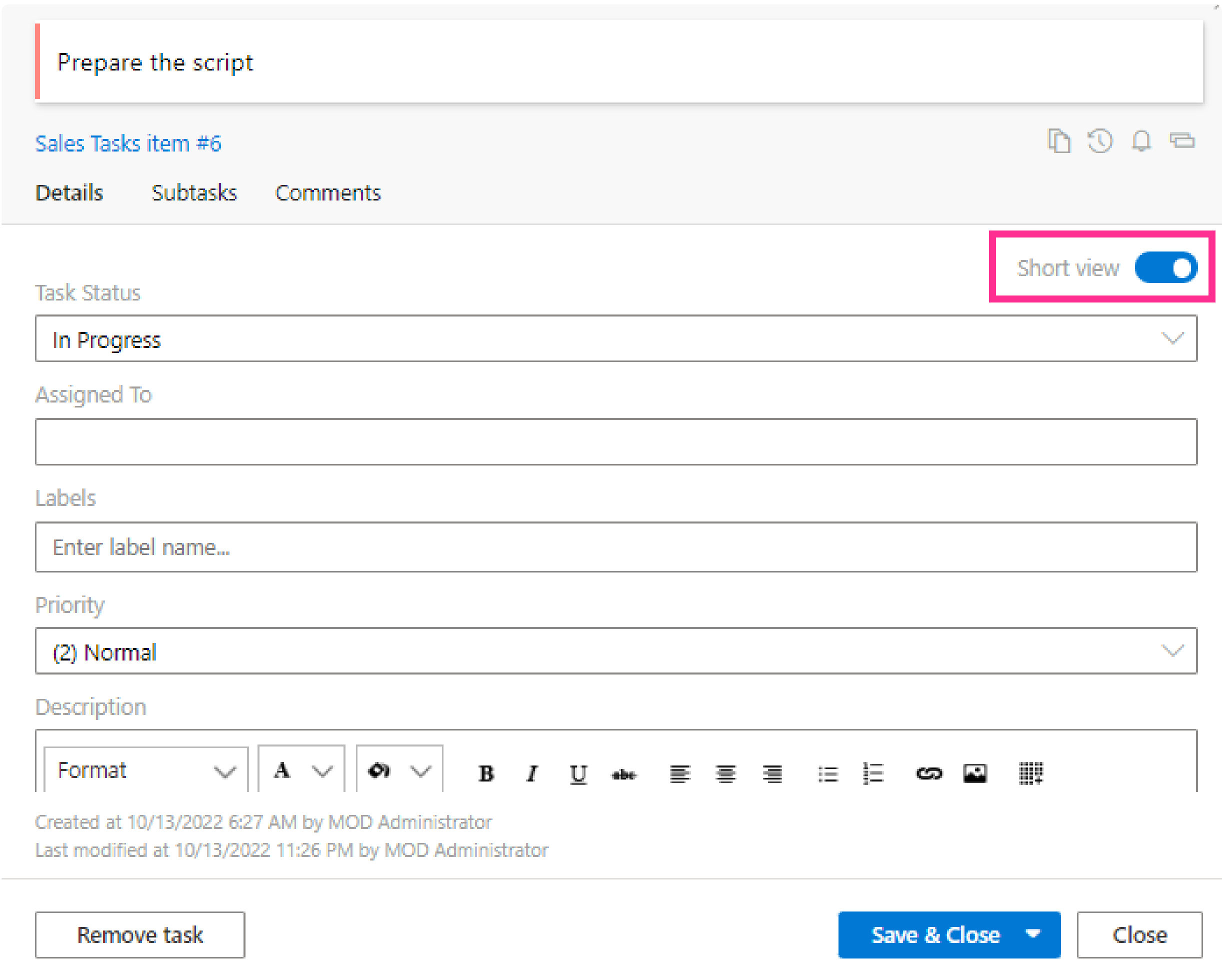
To create a new condition, click “Add style rule.”



If you create multiple style rules and a task matches more than one rule, only the first rule will be applied. You can drag and drop rules to change the priority order.

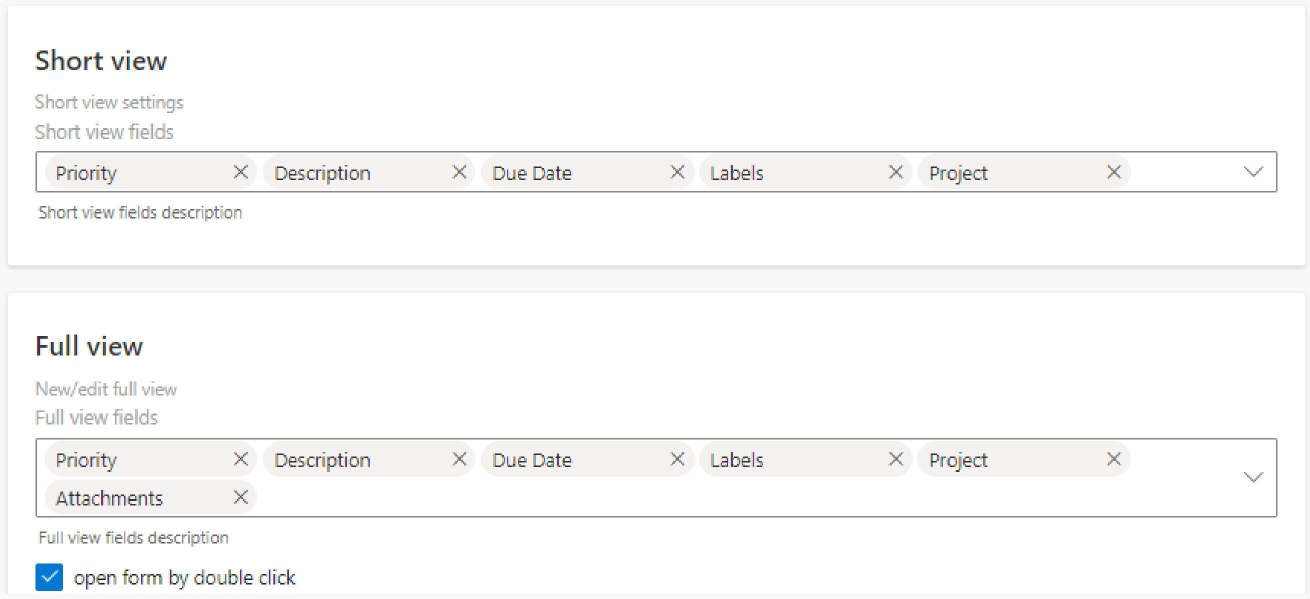
Short view and full view

When you click a card on your kanban board, its task view form opens. You can switch between the short view and full view for the selected card.



Short view and full view

In the “**Cards Setup**” tab of the settings, you can choose which fields to display for both views.



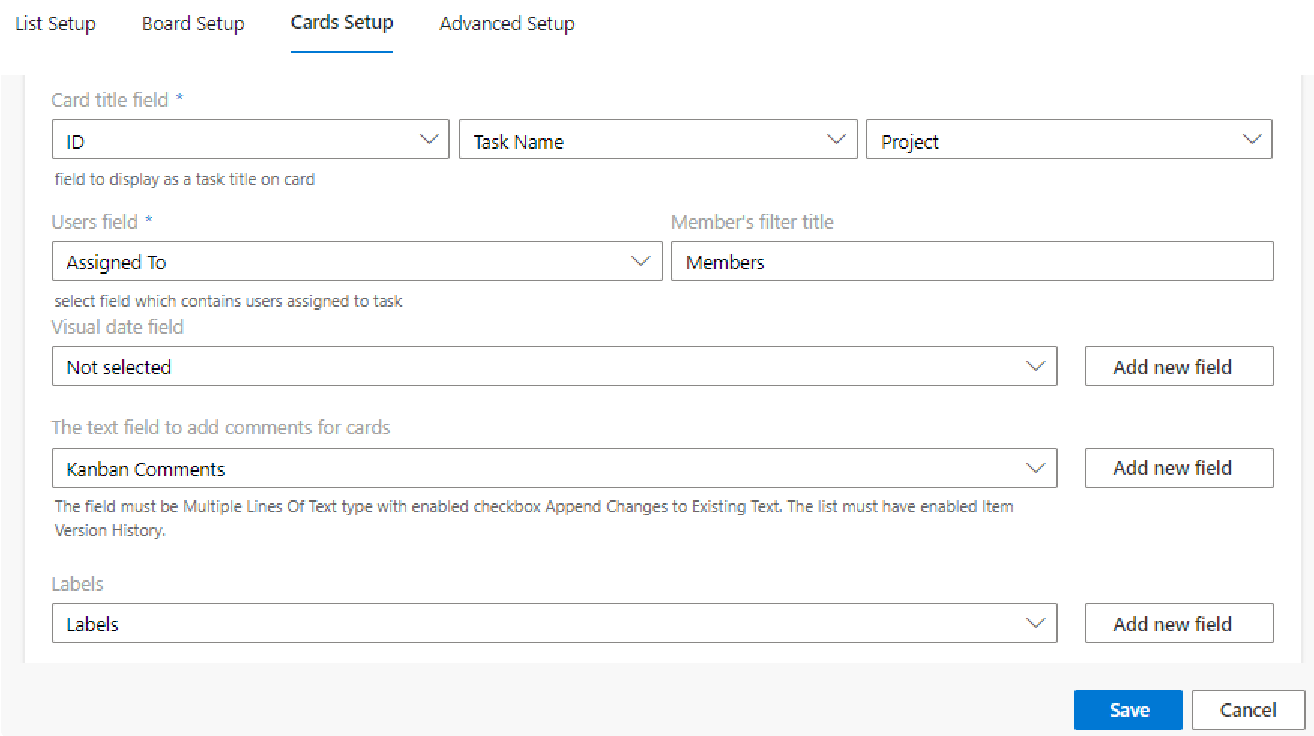
Short view and full view fields

If you tick the "**Open form by double click**" checkbox, you can open the full view by double clicking the card without needing to first open the short view and then switch to full view.

Adding fields to a custom list

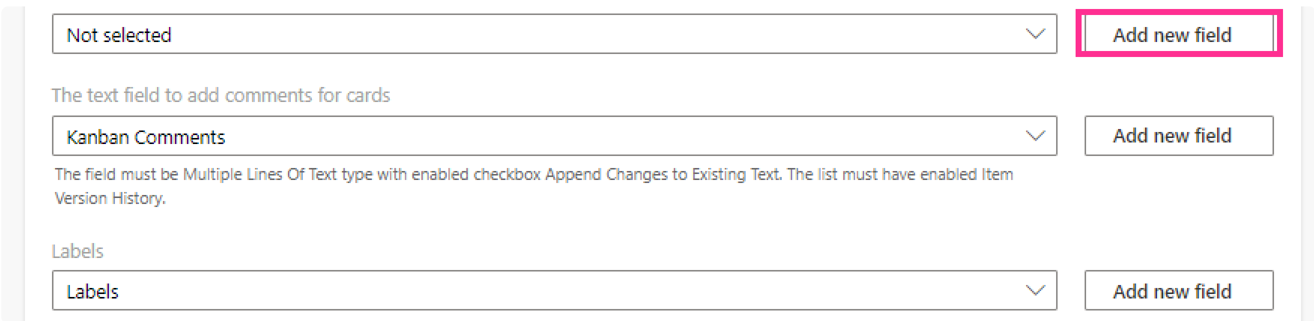
Kanban Board Pro by Virto for Office 365 allows you to add fields to a custom list when creating a board from an existing list.

When you have chosen a list and reached the “**Task information**” step (in the “**Cards Setup**” tab), take a look at the fields—some of them are already selected and others are not.



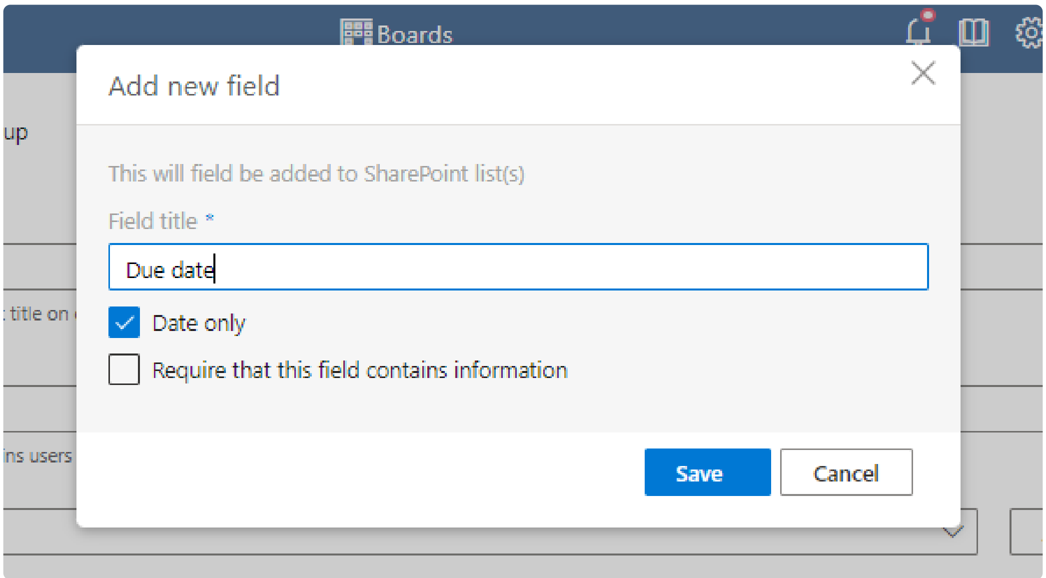
Kanban fields

Select the relevant fields for the visual date, the comments to be added to cards, and the labels. 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.



Add new fields

Specify the name of your field and save it. Tick the checkbox “**Require that this field contains information**” if necessary.



"Add new field" form

The added field will appear. Complete the same steps for the other fields if necessary. For example, in the same way, you can create fields of multichoice type for comments and labels.

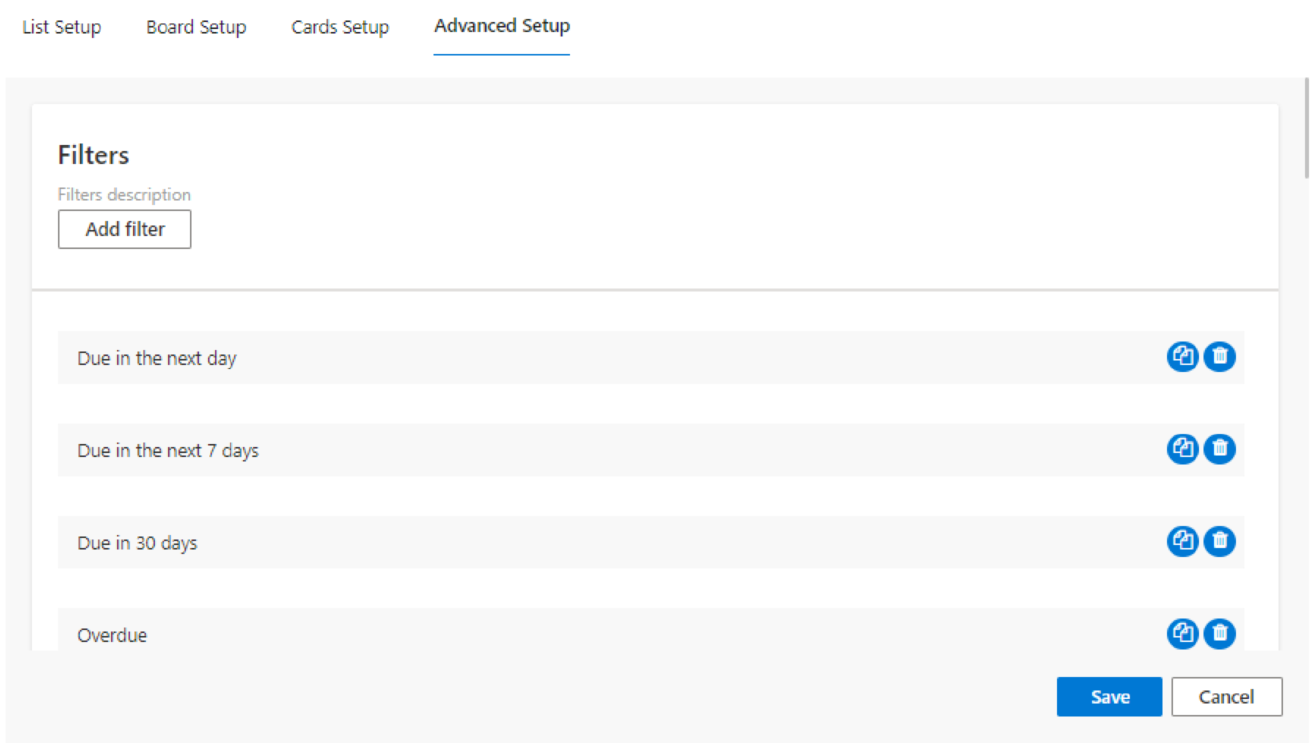
Due date field

The option to add fields is available for all users with the relevant permission level.

> *Make sure you have enabled the version history for the list you've chosen; tick the checkbox to enable it. The version history is required for the comment field.*

Advanced setup

Use the “**Advanced Setup**” settings block to complete the board adjustment. This is not required but may be useful in most cases.



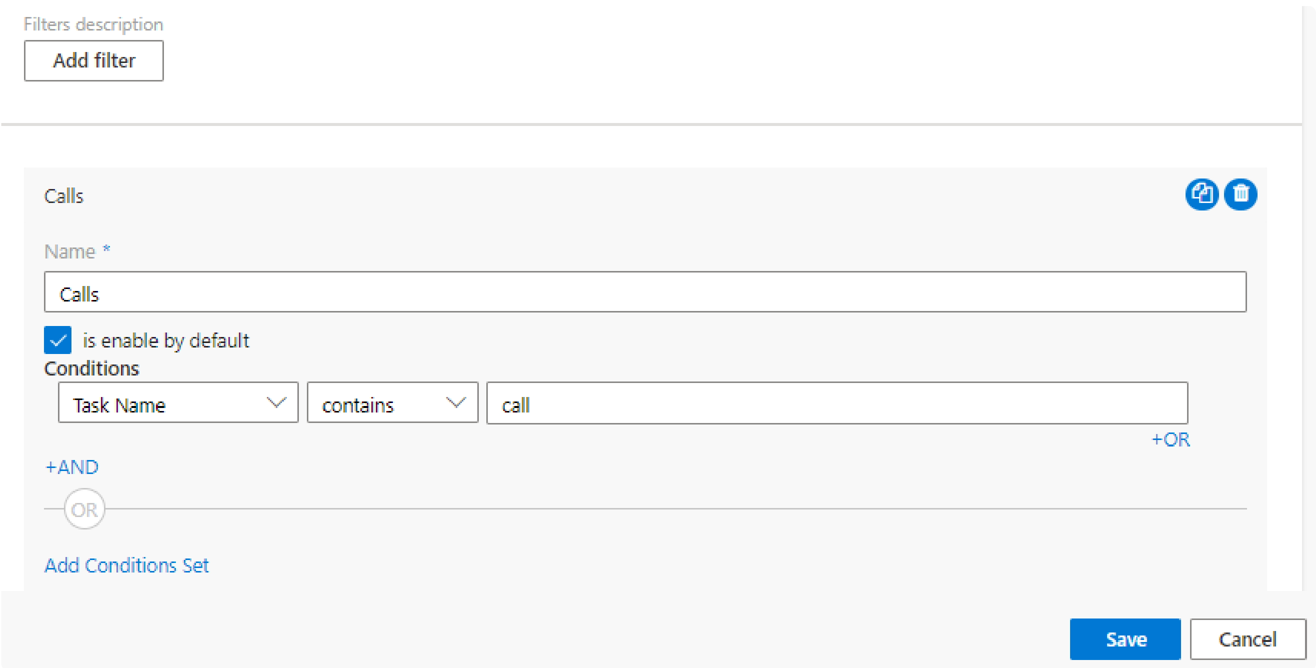
Advanced setup tab

Filter settings

You can use both default and custom filters for tasks.

Filter settings

Click “**Add filter**” and define the custom conditions. Check the box “**is enabled by default**” to apply the filter to the default board view.



New filter

You can copy or delete a filter using the icons to the right.

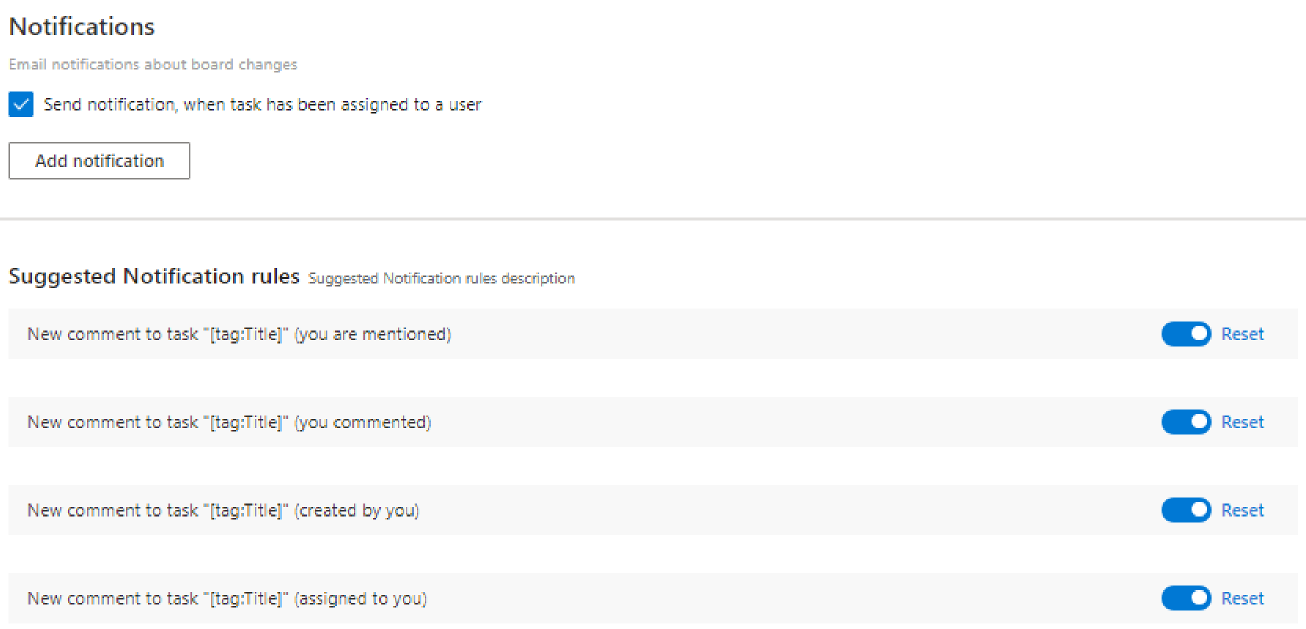
Copy or delete filters

Notifications

> The built-in Notification functionality will be disabled as of March 20, 2023.
>
> If you want to set up notifications in Virto Kanban, use Alerts and Reminders app by Virto. More info: **Alerts and Reminders**

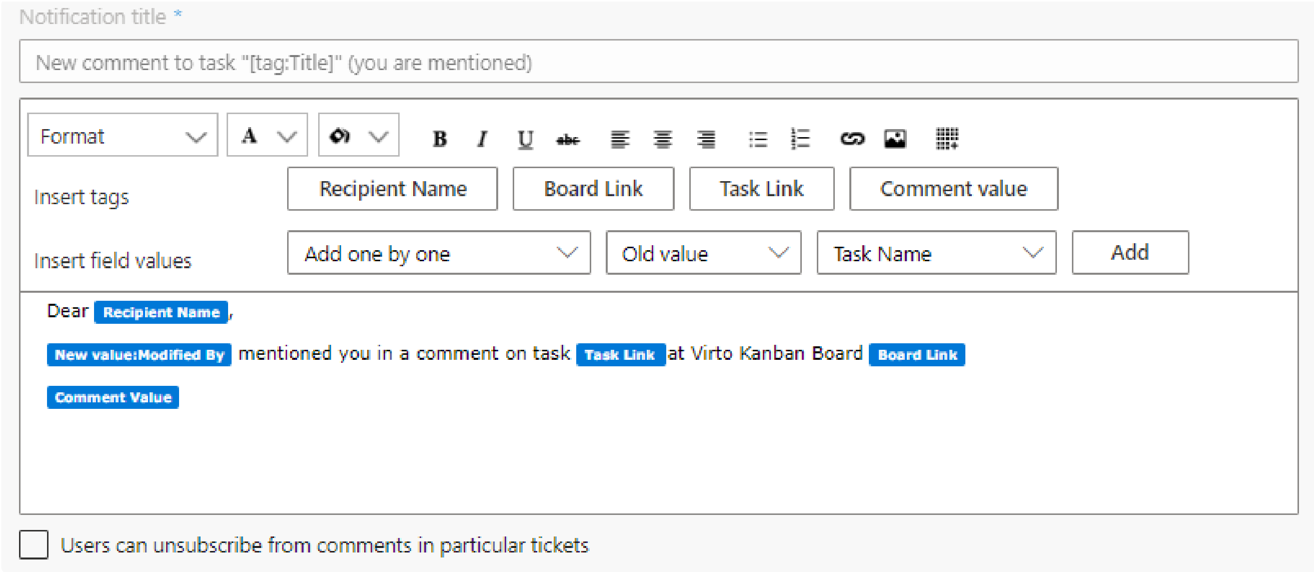
Kanban Board has a built-in alert system. You can create email notifications about any kanban board changes and use the default alerts. Create conditions and define the list of users who will receive email notifications related to these changes.

There are four default notifications as shown below.



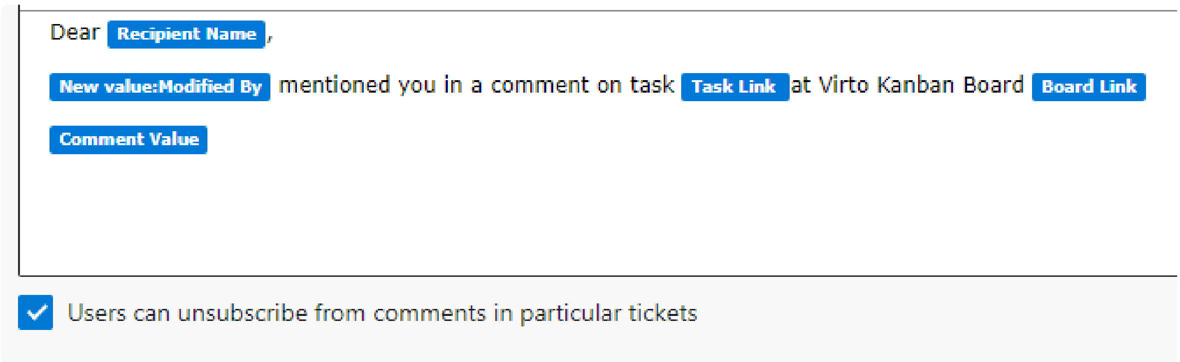
Notifications

These notifications have a customizable message body.



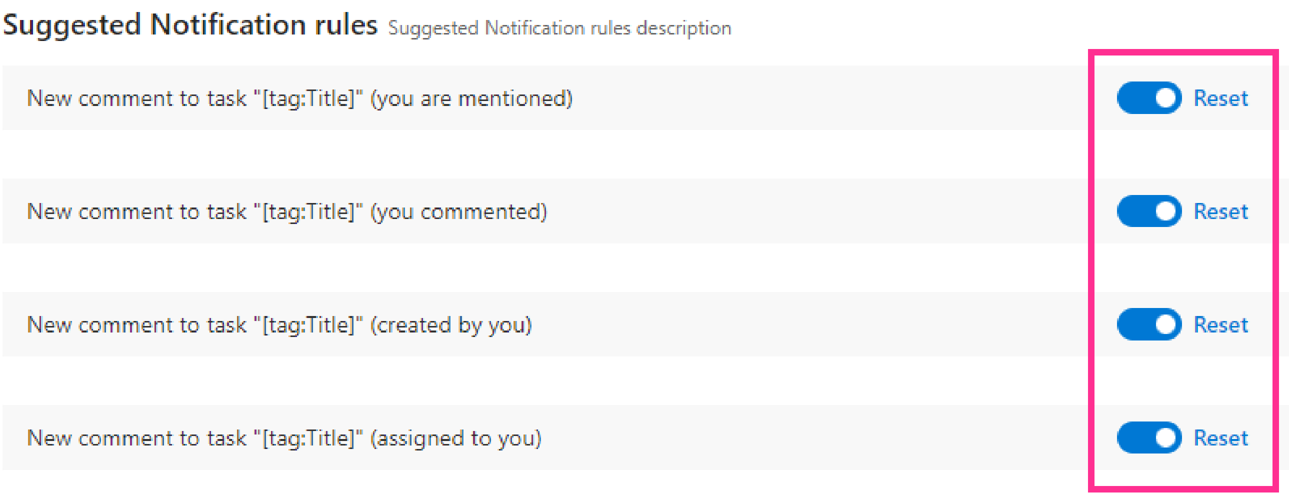
Message body

You can allow users to unsubscribe from these alerts.



Unsubscribe

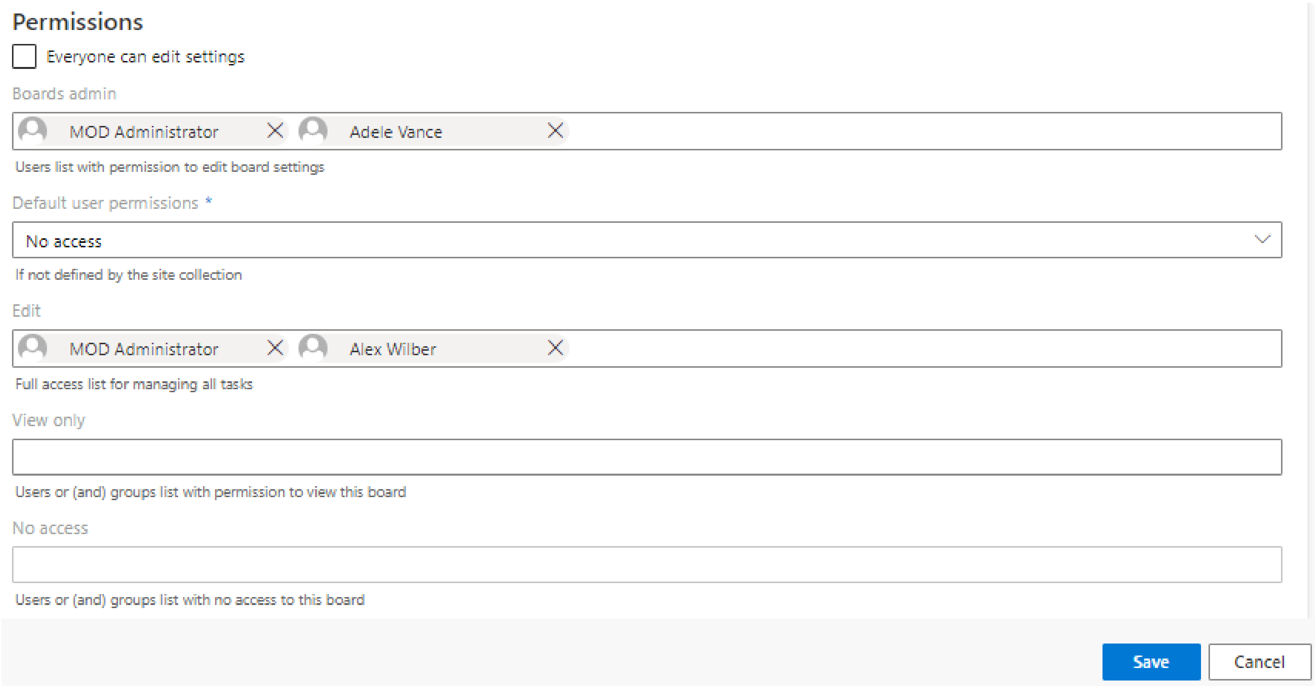
You can also deactivate these notifications or enhance them with additional information (use the reset button to apply a new notification form).



Reset notifications

Board permissions

You can define board admin, set default permissions, and define which users have edit, view only, or no access rights.



Board permissions

For detailed permissions information, see the **Kanban Board permissions** section.

Chart settings

Kanban Board Pro by Virto supports using five flexible **charts** to analyze board activities. You can decide which charts to show. You can also define which users have access to these charts.

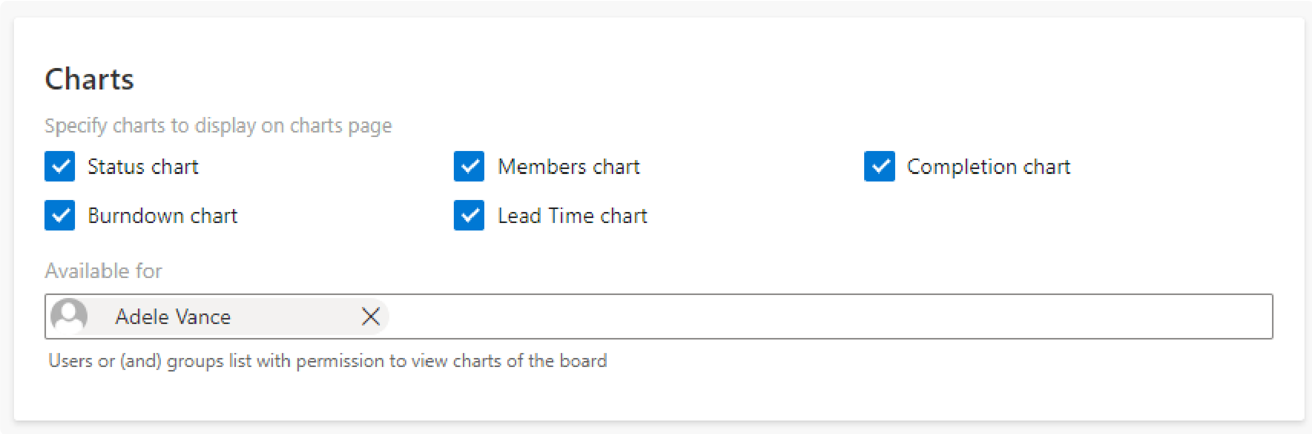
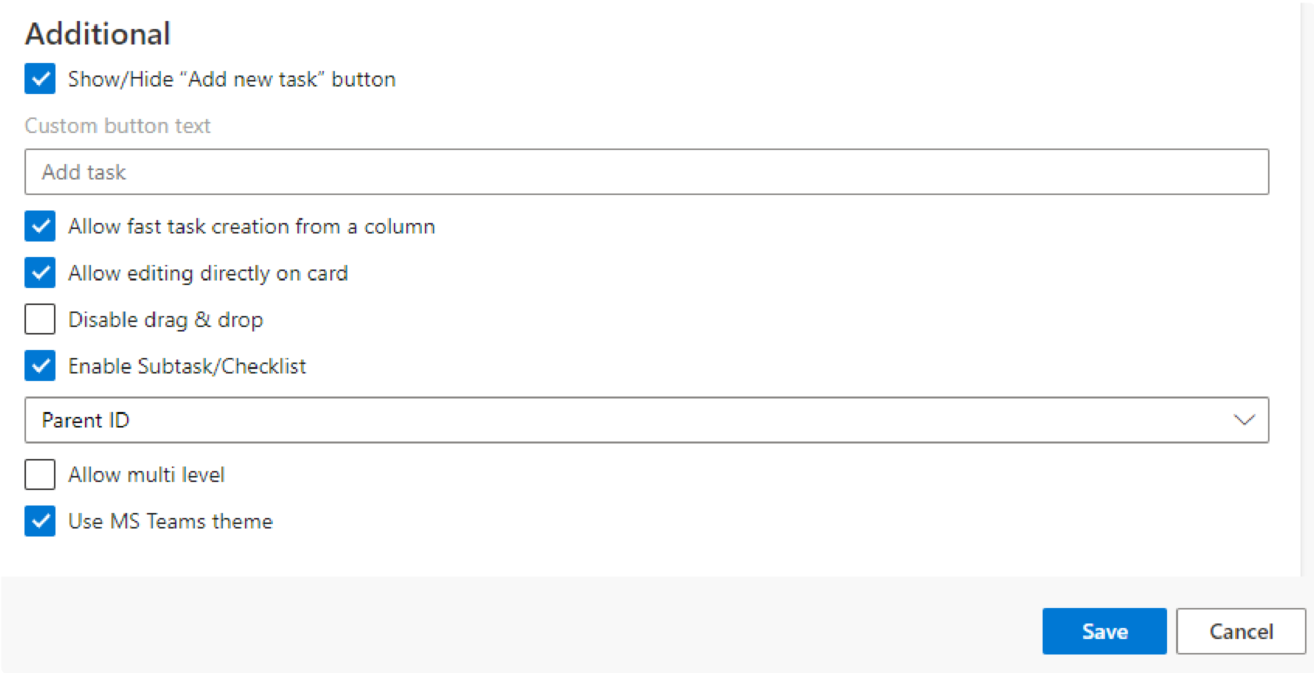


Chart settings

Additional

Additional options are placed into this block of settings.



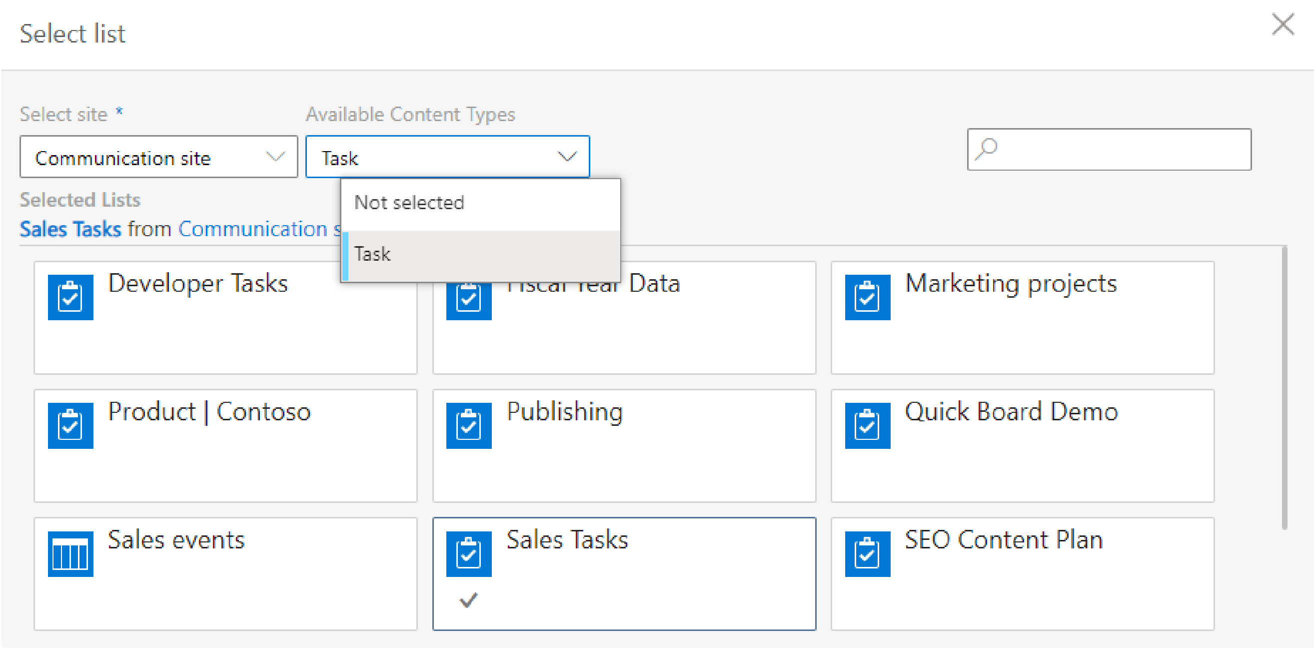
Additional options

Here you can determine whether to show or hide the "**Add new task**" button, specify the name for the add task button, allow task actions on the board (including drag and drop), turn on the subtasks mode, and enable dark theme for the Kanban Board app in Microsoft Teams.

Fields compatibility

To adjust the board correctly, you need 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 into a single board.

The "**Available Content Types**" drop-down menu in the list settings allows you to select the lists containing the chosen content type. The "**Task**" content type is the most appropriate for a kanban board and usually contains all fields required for board creation.



Content type

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

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

In case you don't have the required fields in your SharePoint list, you **can add them in the card settings**.

Finally, you can always **create a quick board** with all the necessary fields and preferences added automatically.

Alerts and Reminders

If you want to set up notifications in Virto Kanban, use the Alerts and Reminders app by Virto. The built-in Notification functionality will be disabled as of March 23, 2023.

Current Kanban Board Pro users can download Alerts and Reminders for free (click the "**Get your free trial**" button) and install it.

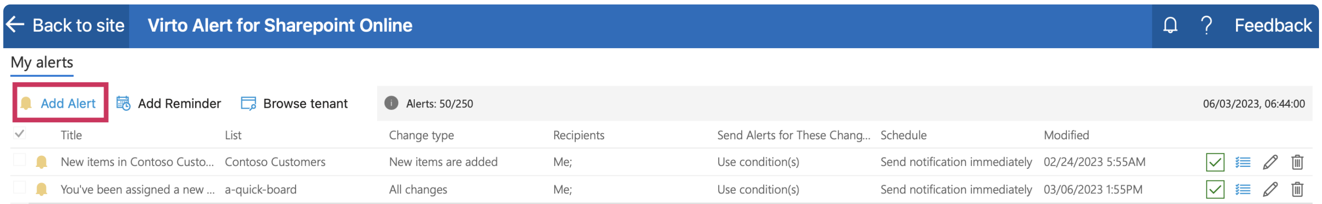
It is entirely free for Virto Kanban users: your trial period will be automatically extended.

New users will have the Alerts and Reminders app included in their subscription to Kanban Board Pro.

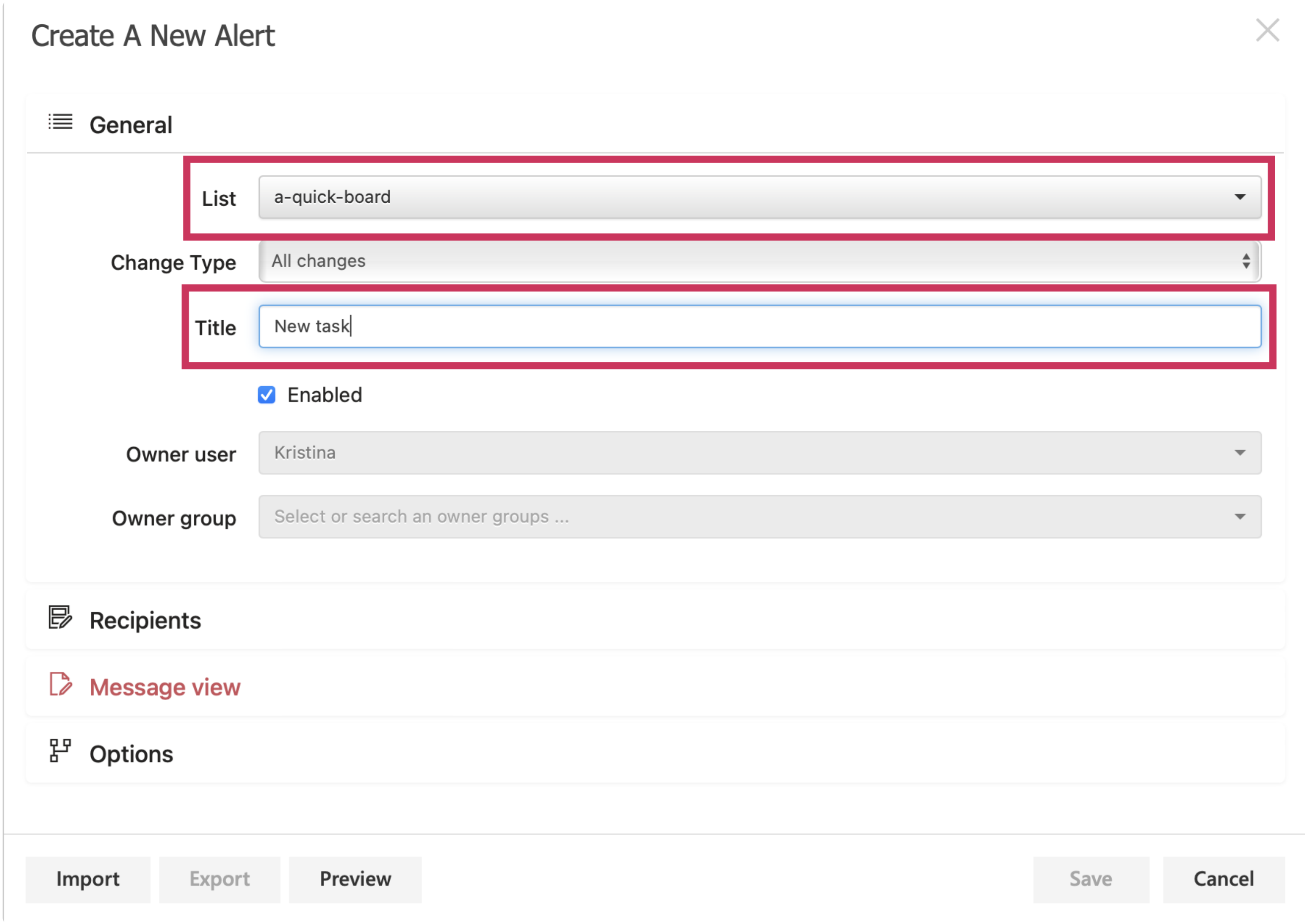
> Watch the video instructions on getting started with the Alerts and Reminders app.
>
> Read the article or watch the video to learn how to alert about changes on the Kanban Board in Microsoft Teams.

How to set up an alert if a task has been assigned to a user?

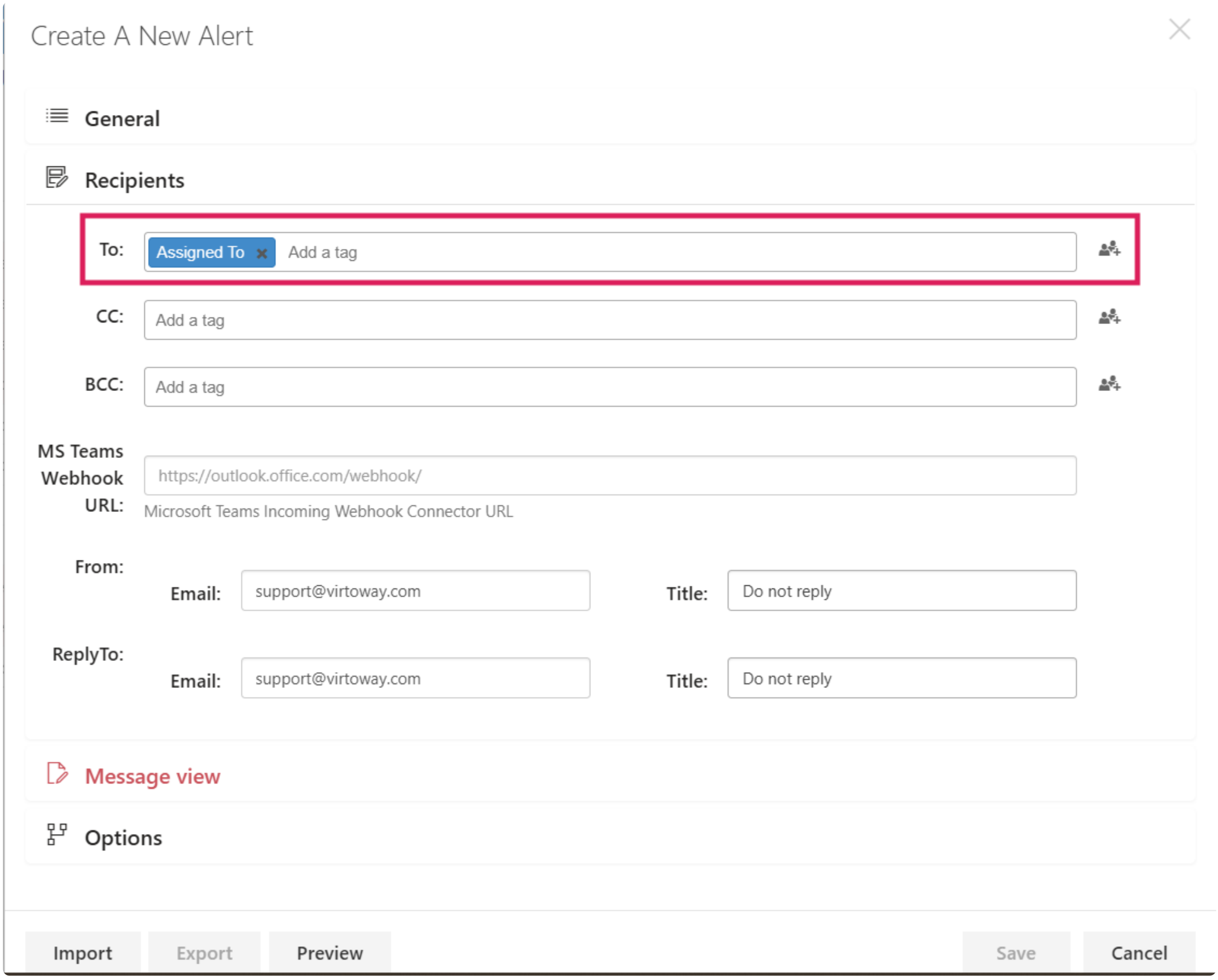
Open Alerts and Reminders app. Then click "**Add Alert**" on the ribbon.



Select the Kanban Board list from a drop-down menu and give a name to your new alert.

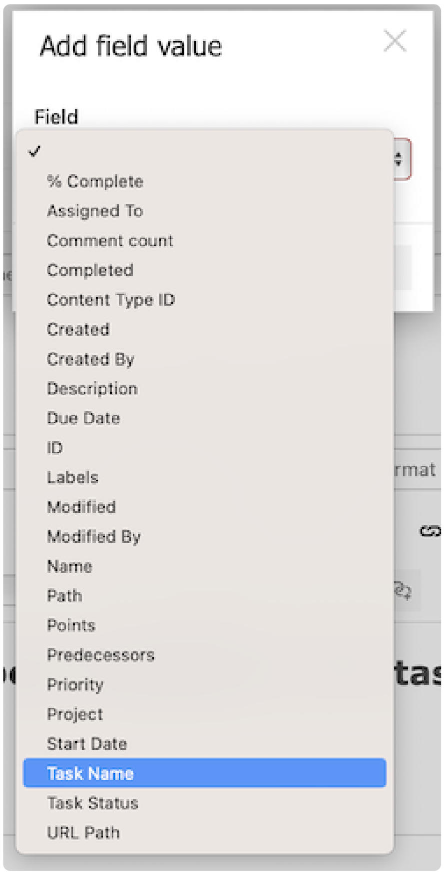


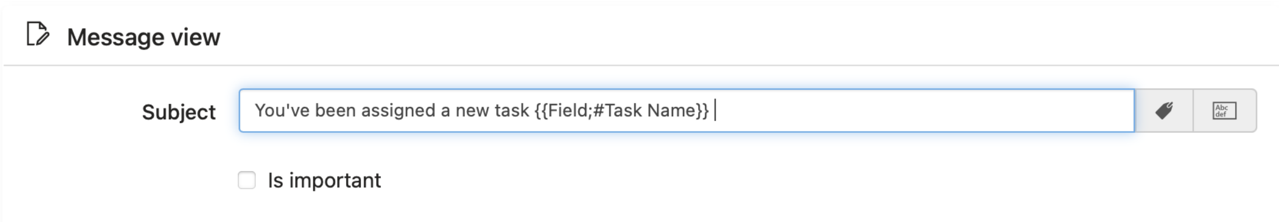
Select "**Assigned To**" in the Recipients tab.



Add subject text. Include a task name and list name field values, so the recipient immediately sees the alert. To do it, click the "**Add field value**" icon.

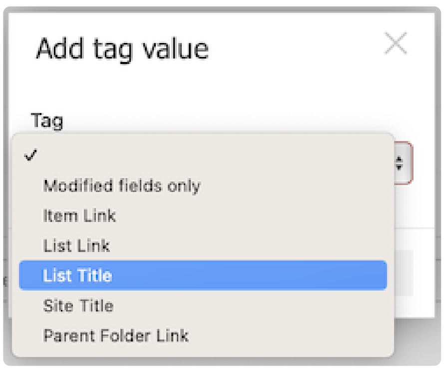
Choose "**Task Name**" in the drop-down menu.

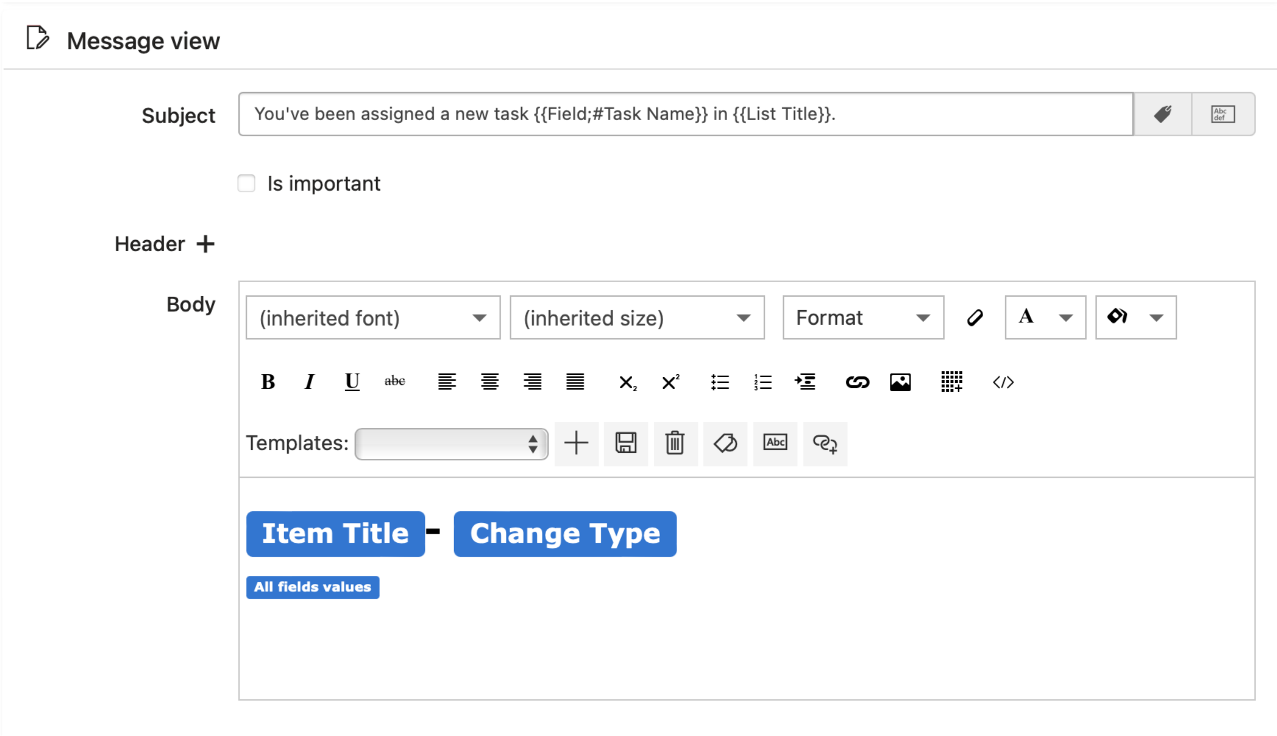




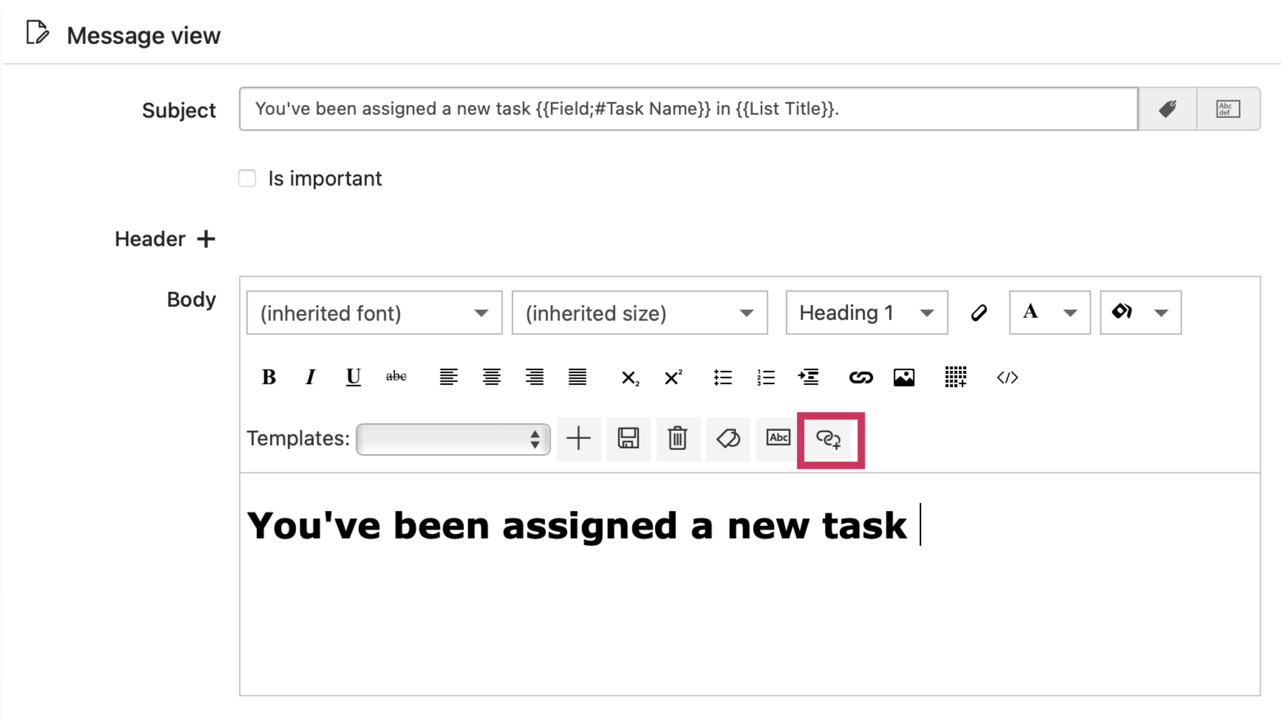
Then click the "**Add tag**" icon.

Choose "**List Title**" in the drop down menu and click "**Add.**"

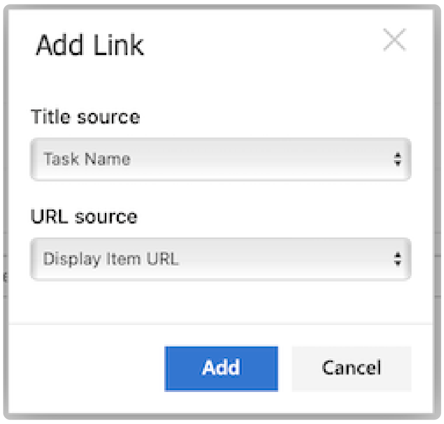




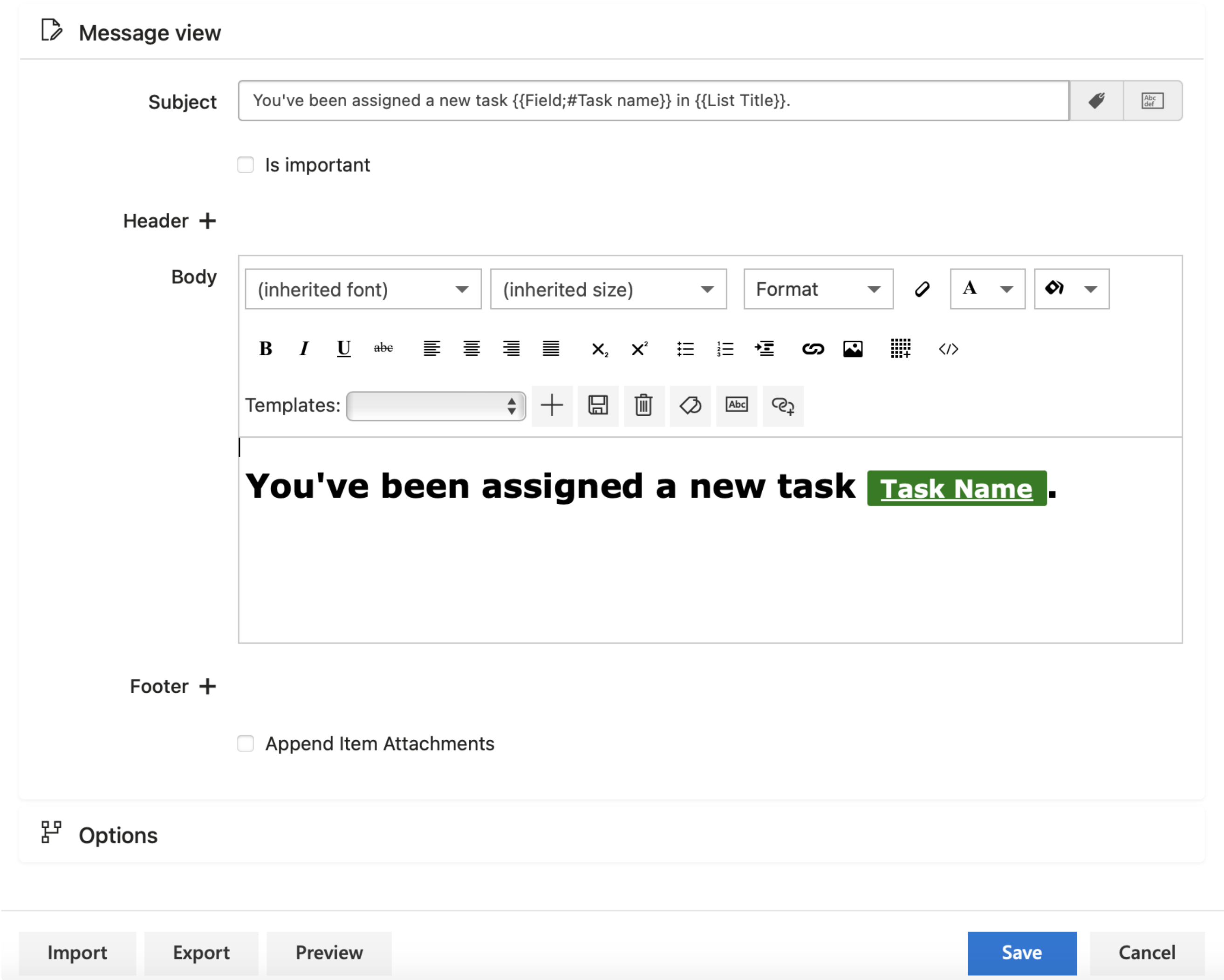
Then move to the body of the message. Erase the template and write your text. Then click the "**Add complex link**" icon.



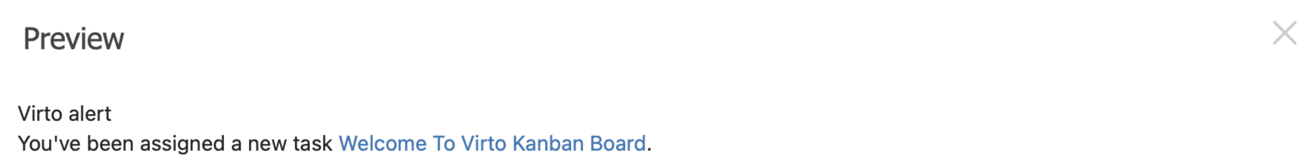
Choose "**Task Name**" and "**Display Item URL**" from the drop-down menu. Click "**Add.**"



This is what you should get.



Click "**Preview**" in the lower left corner.



If you are satisfied with this version, your alert is ready.

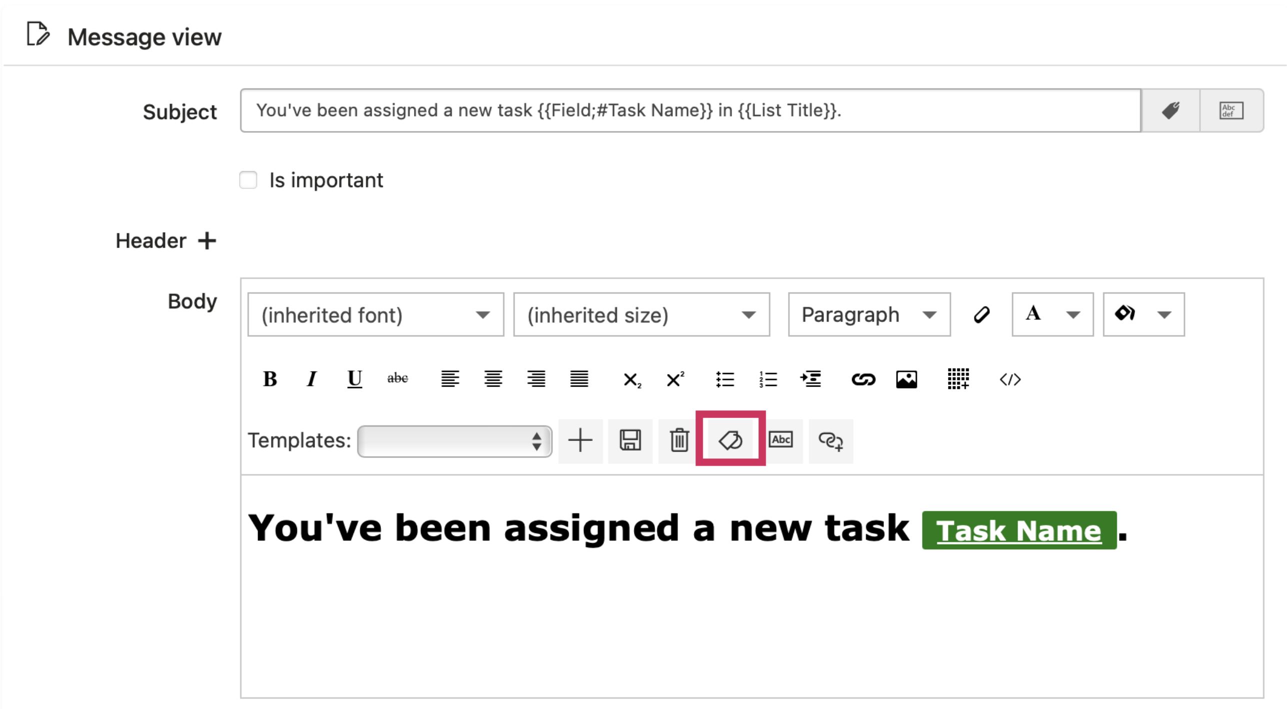
If you want the user to receive a table with all the current values of the item (as in the example below), you need to add another tag to the email.

Preview

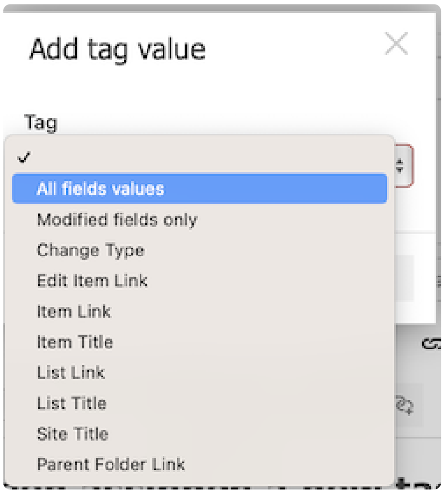
Virto alert
You've been assigned a new task Welcome To Virto Kanban Board.

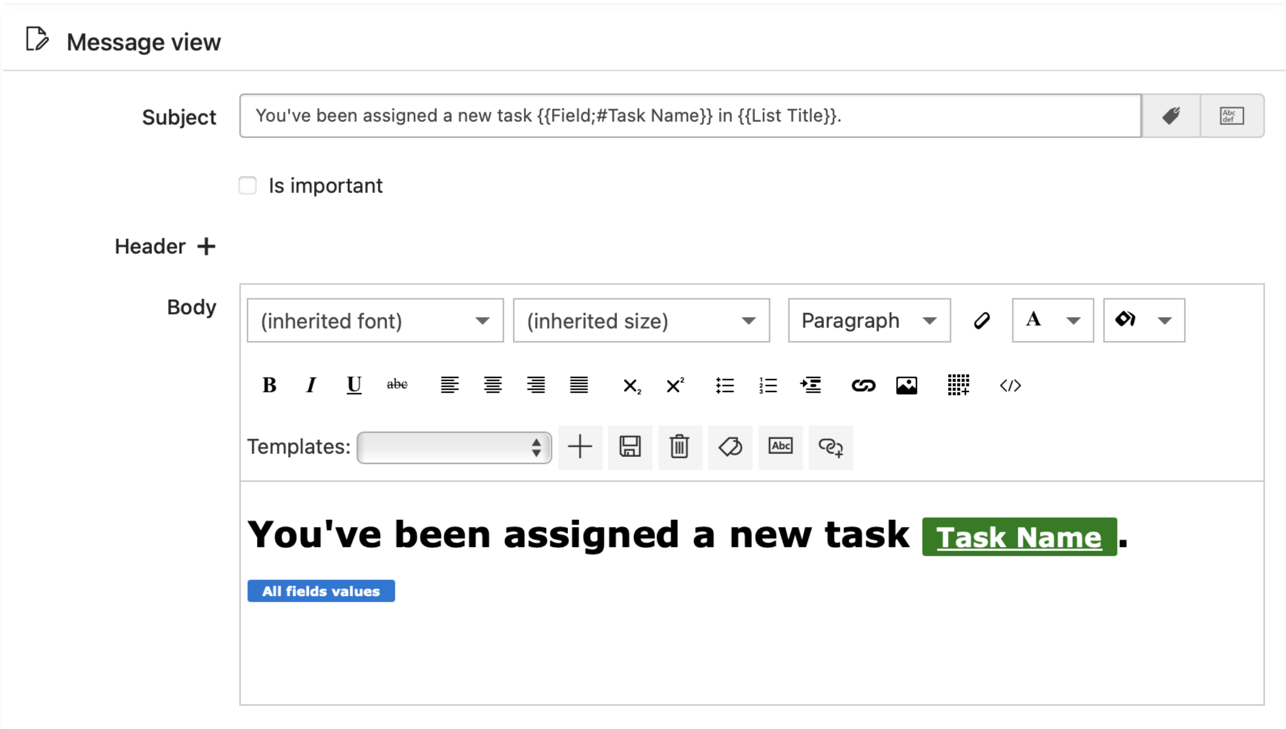
Field Name	Value
ID	1
Task Name	Welcome To Virto Kanban Board
Priority	(2) Normal
Task Status	Not Started
% Complete	0%
Assigned To	Kristina
Completed	No
Labels	Label 1
Project	Project 1
Modified	21/02/2023 07:44
Created	21/02/2023 07:44
Created By	Kristina
Modified By	Kristina
Version	1.0
Attachments	False
Task Name	Welcome To Virto Kanban Board
App Created By	kanban-app
App Modified By	kanban-app

To set up this table, click the "**Add tag**" icon.

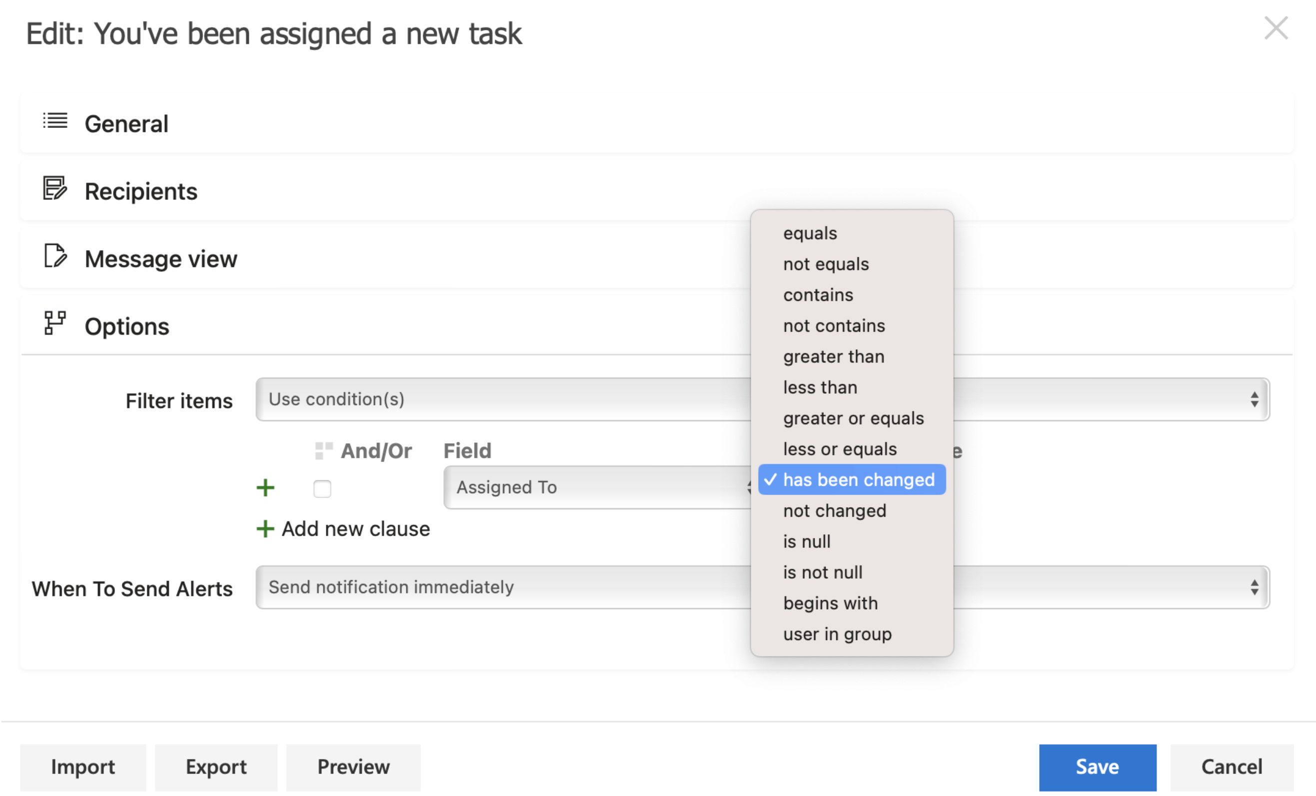


Choose "**All fields values**" in the drop-down menu.





Go to the Options tab. In Filter items**,** select "**Use condition(s)**"; in Field, select "**Assigned To**"; in Operator - "**has been changed**." Click "**Save**."



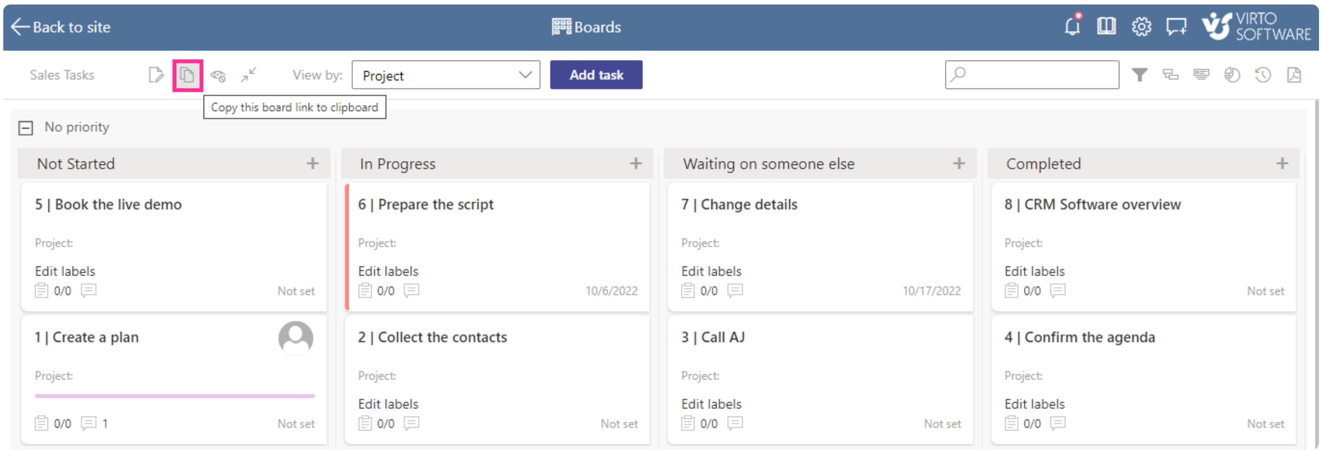
Now each time after "**Assigned To**" field changes, the particular user will receive a notification with the name and task link.

Working with Kanban Board Pro

Board and task links

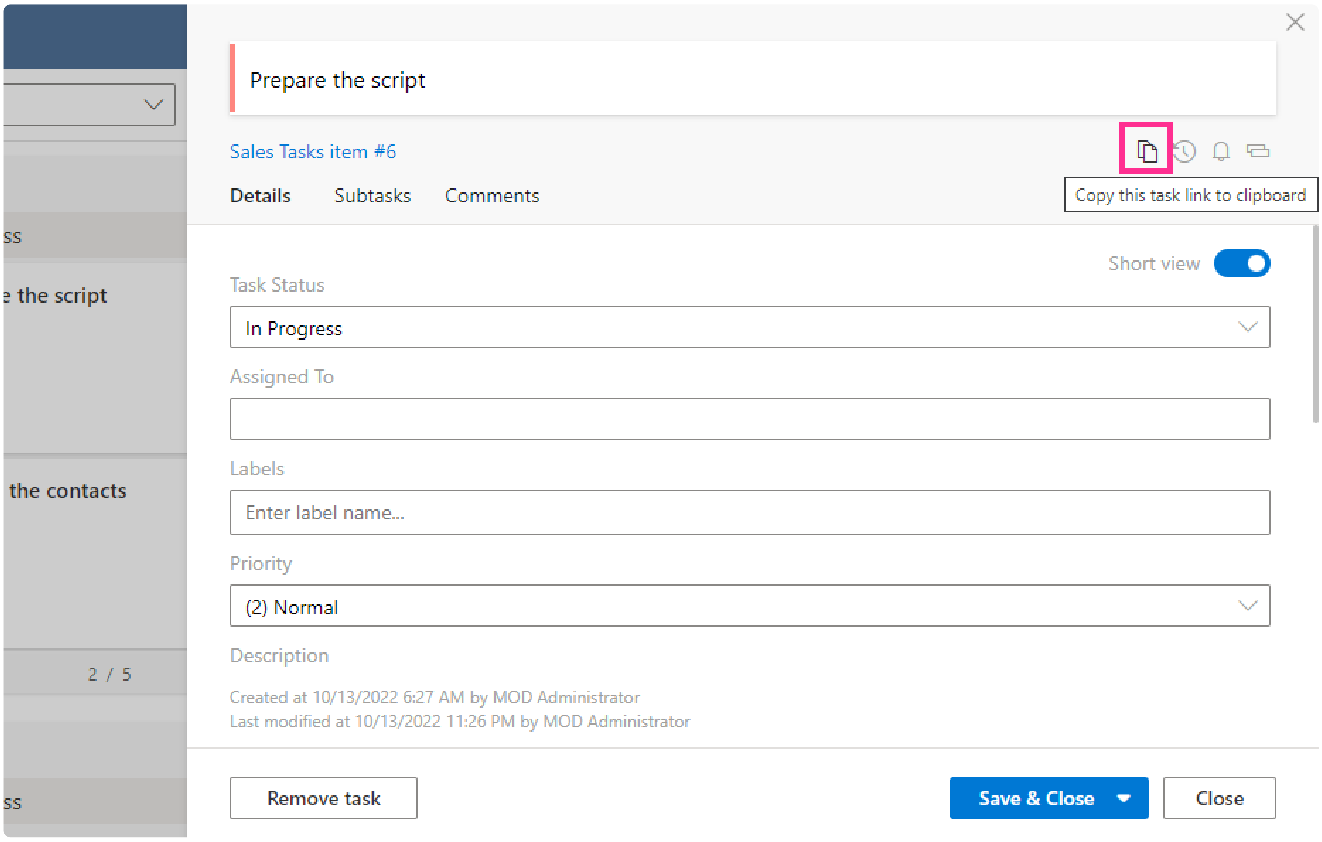
Each board has a direct link. You can share it with team members or add it to a **quick launch on your SharePoint site**.

Click the copy icon on the board header to copy the board link to your clipboard.



Copy link to a board

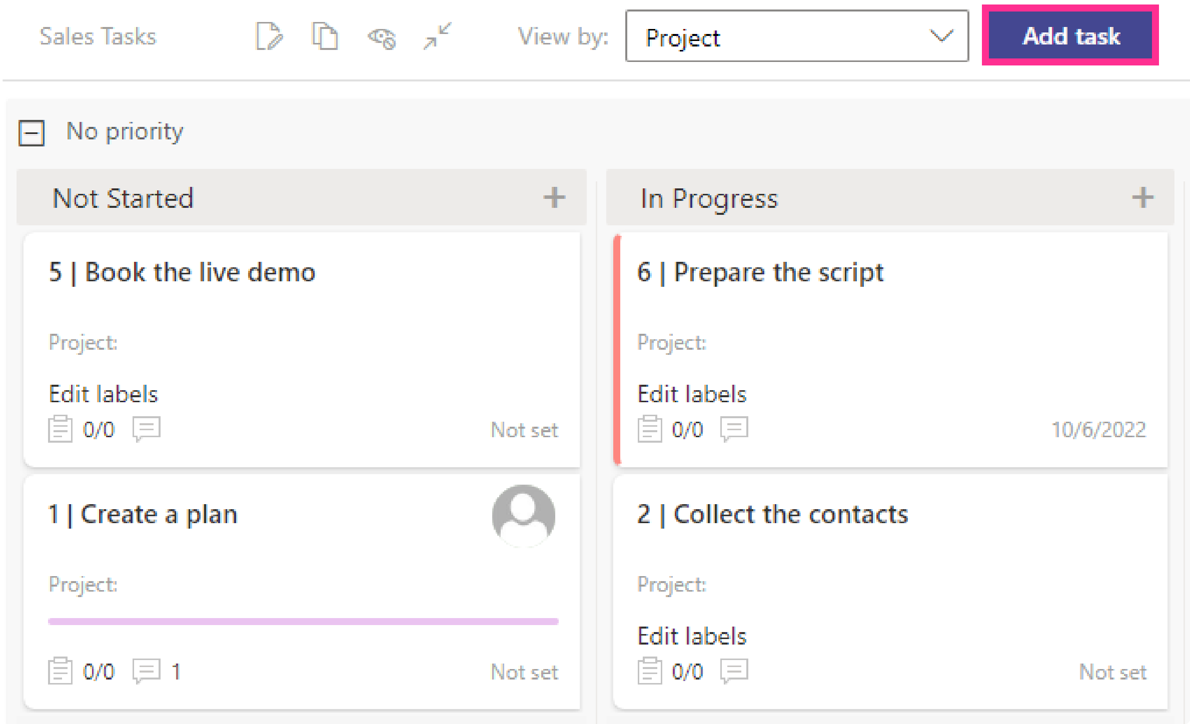
You can also copy the link for a task.



Copy link to a task

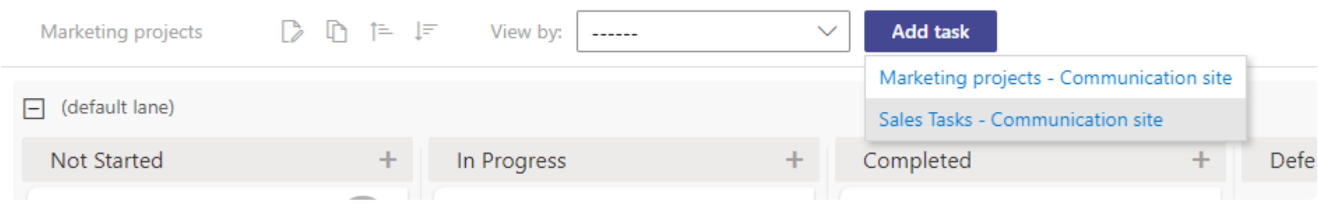
Adding a task

Use the “Add task” button to add new tasks to a board.



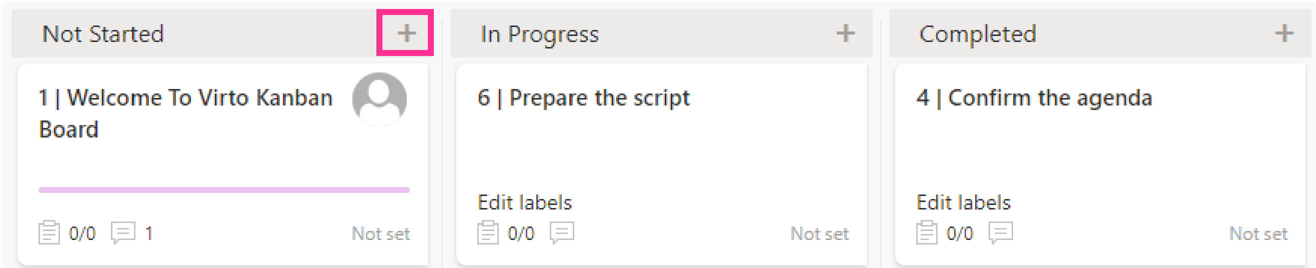
Add task

If multiple lists are added to the board, select the list the task should belong to.



Multiple lists

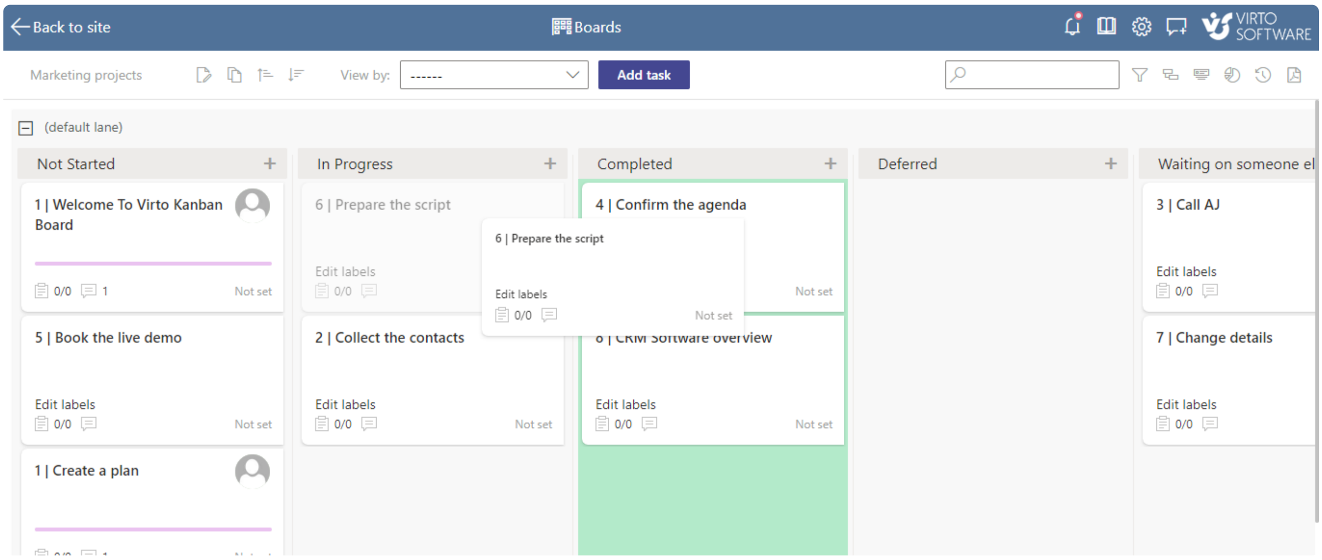
You can also use “**+**” to add a task directly to a column or swimlane.



Add task to a column

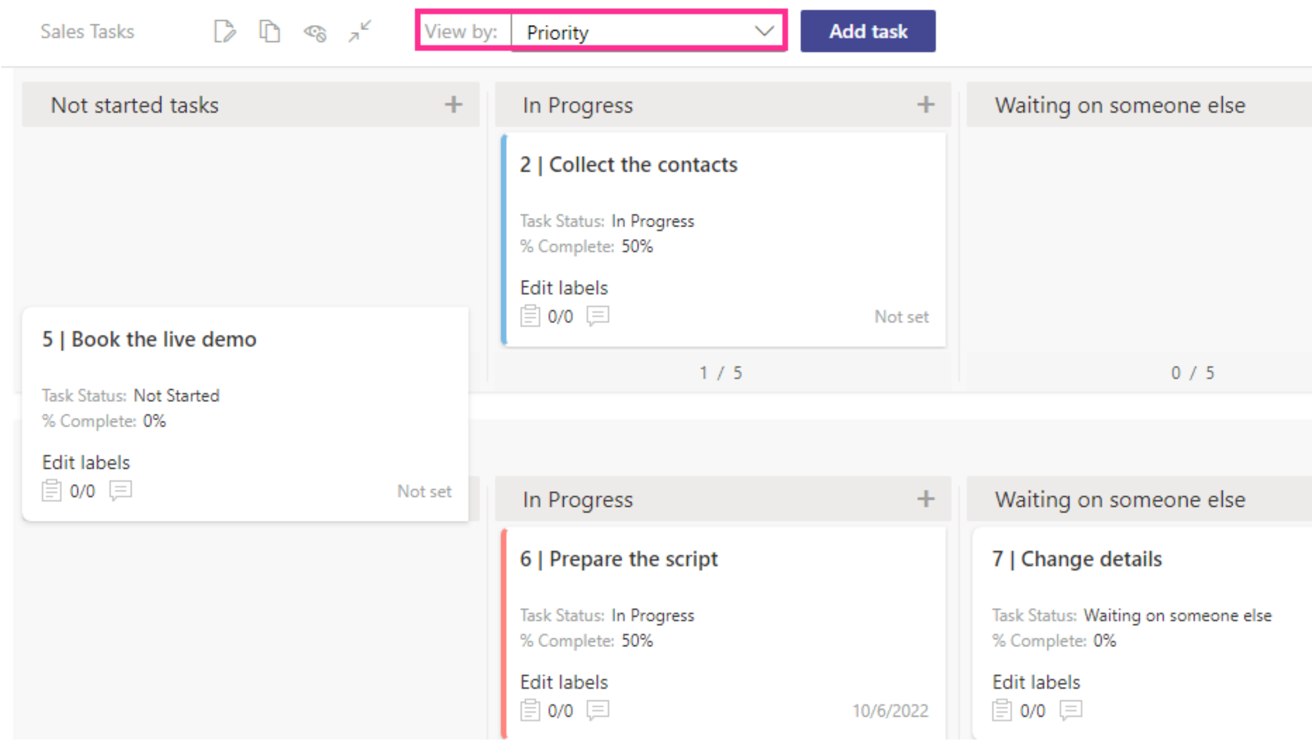
Move tasks

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



Drag and drop task to a new column

You can drag and drop tasks between swimlanes. For example, in this case, the priority field is chosen for swimlanes. If you drag and drop a task to another swimlane, its priority will be changed.

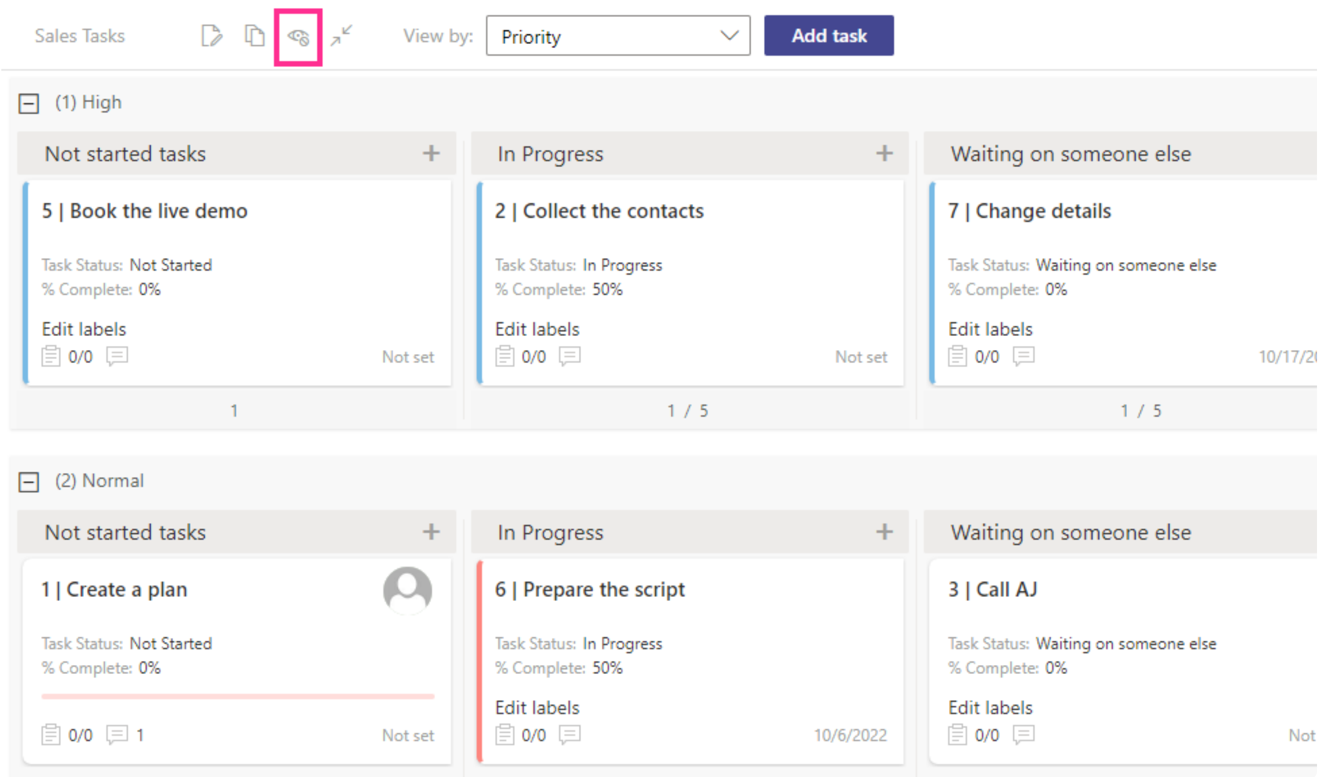


Drag and drop tasks between swimlanes

Swimlanes

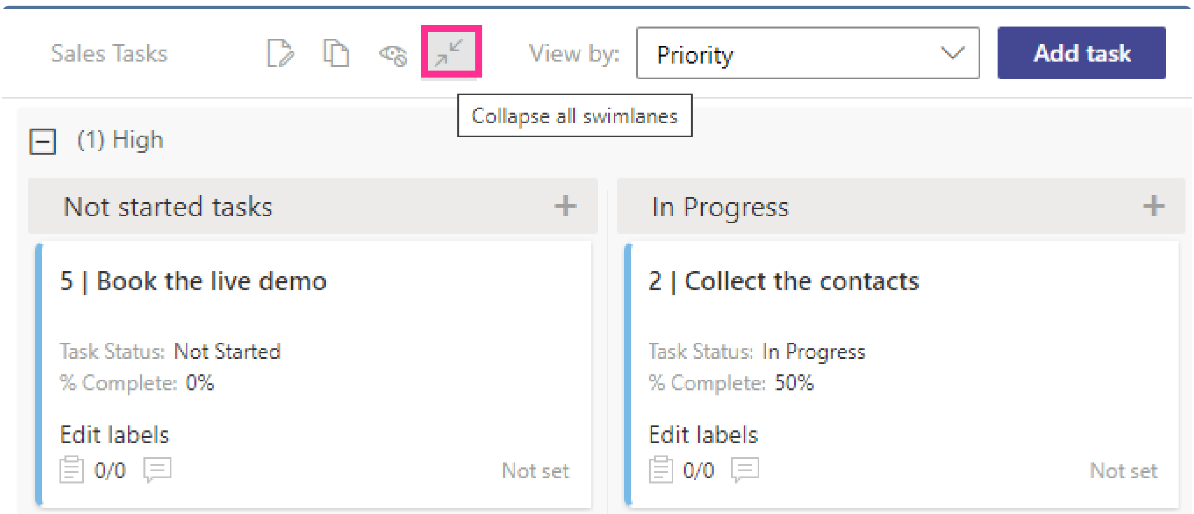
Hide/collapse swimlanes

Use the hide empty swimlanes icon to hide all swimlanes that do not currently contain any tasks.



Hide empty swimlanes

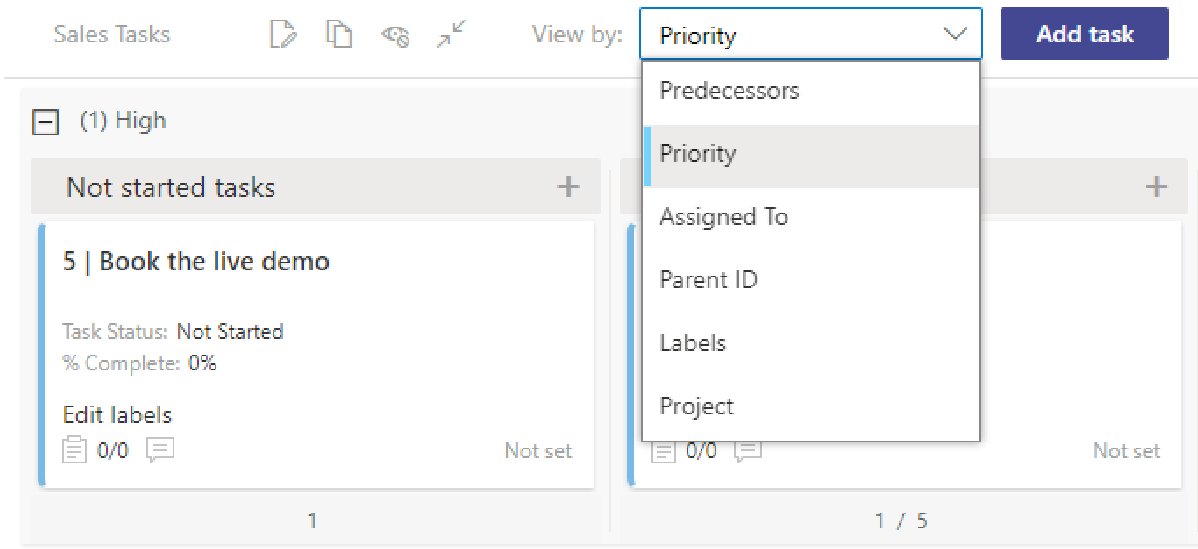
You can collapse or show all the swimlanes at once by using the relevant icon.



Collapse all swimlanes

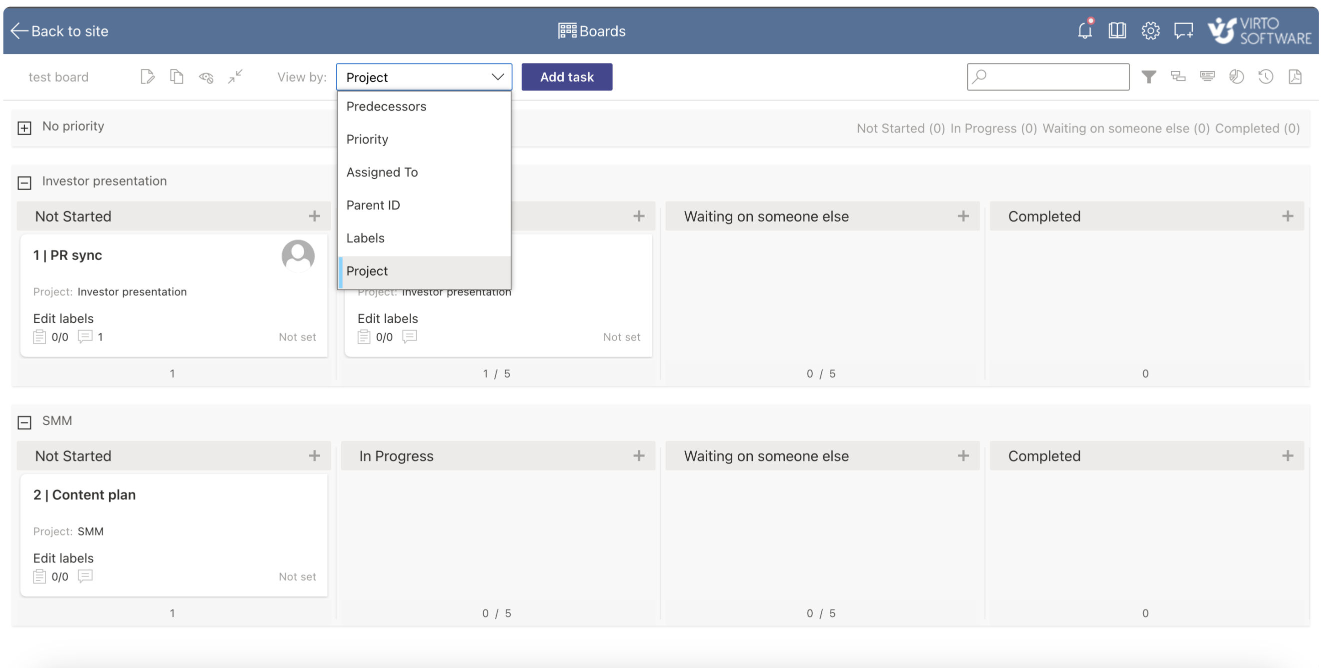
Switch swimlanes

You can change the field directly on the board to view tasks grouped in swimlanes. There's no need to open the settings and make modifications—simply choose the desired swimlane field from the drop-down menu.



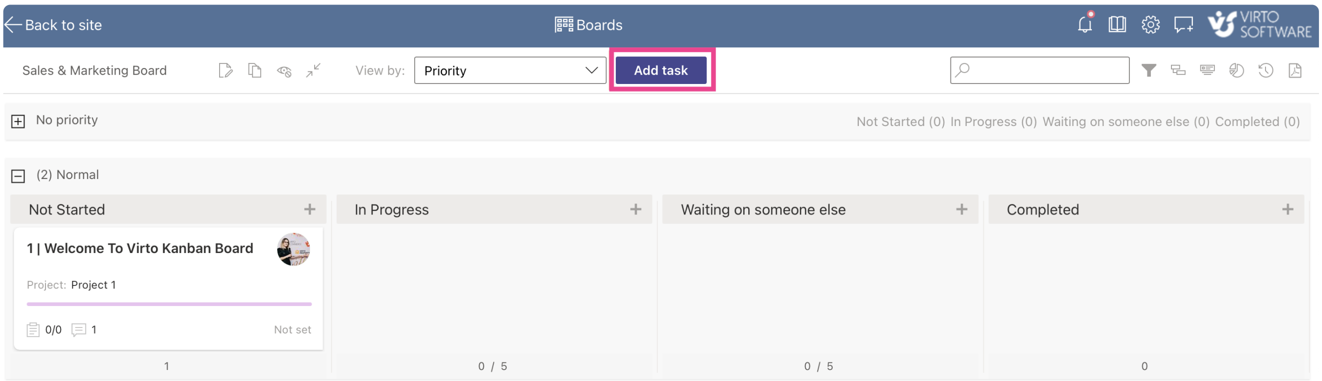
Change swimlane field

Quick boards have swimlanes organized by a project by default. You can change it by choosing the desired view from the "View by" drop down menu.

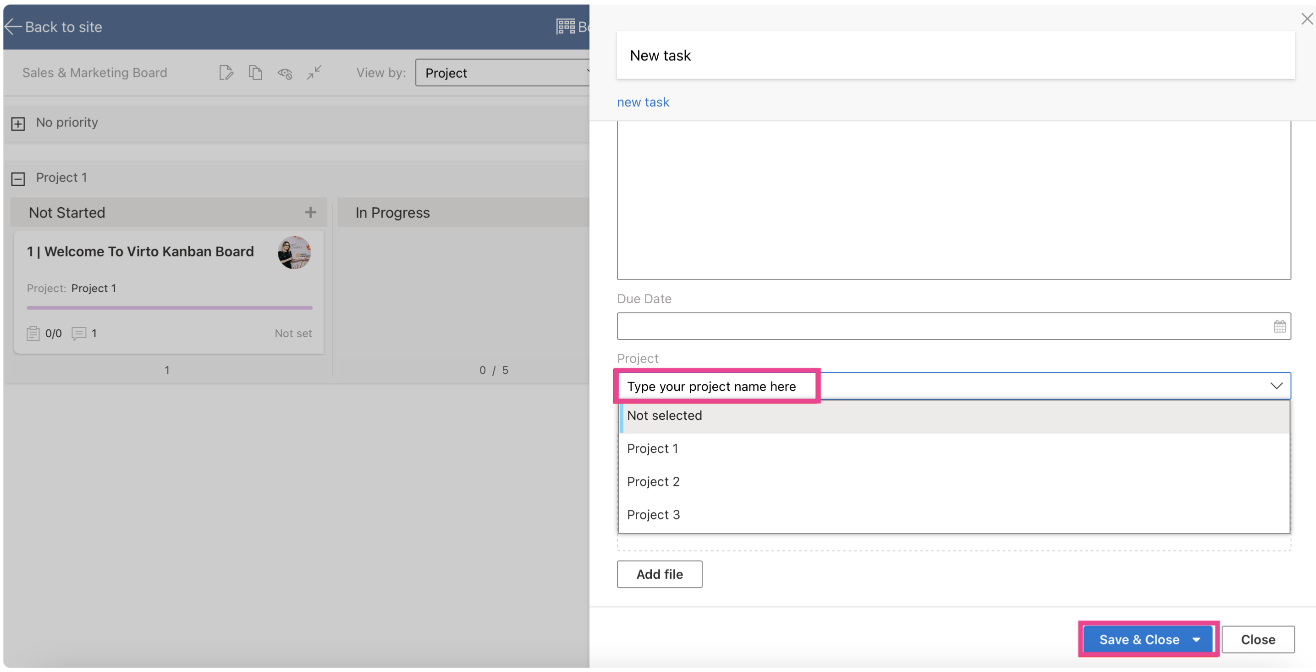


View by drop down menu

If you want to create a new project, create a new task and type your new project name at the bottom of the task's card.



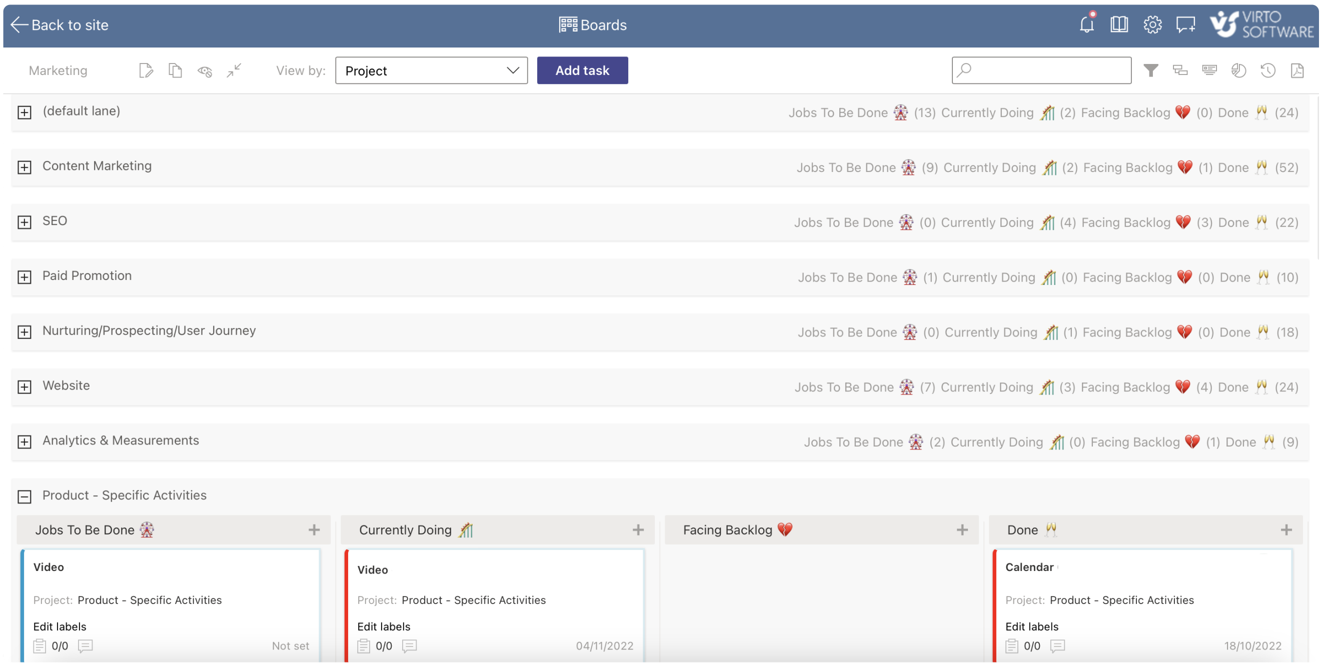
Add task



Provide your project name

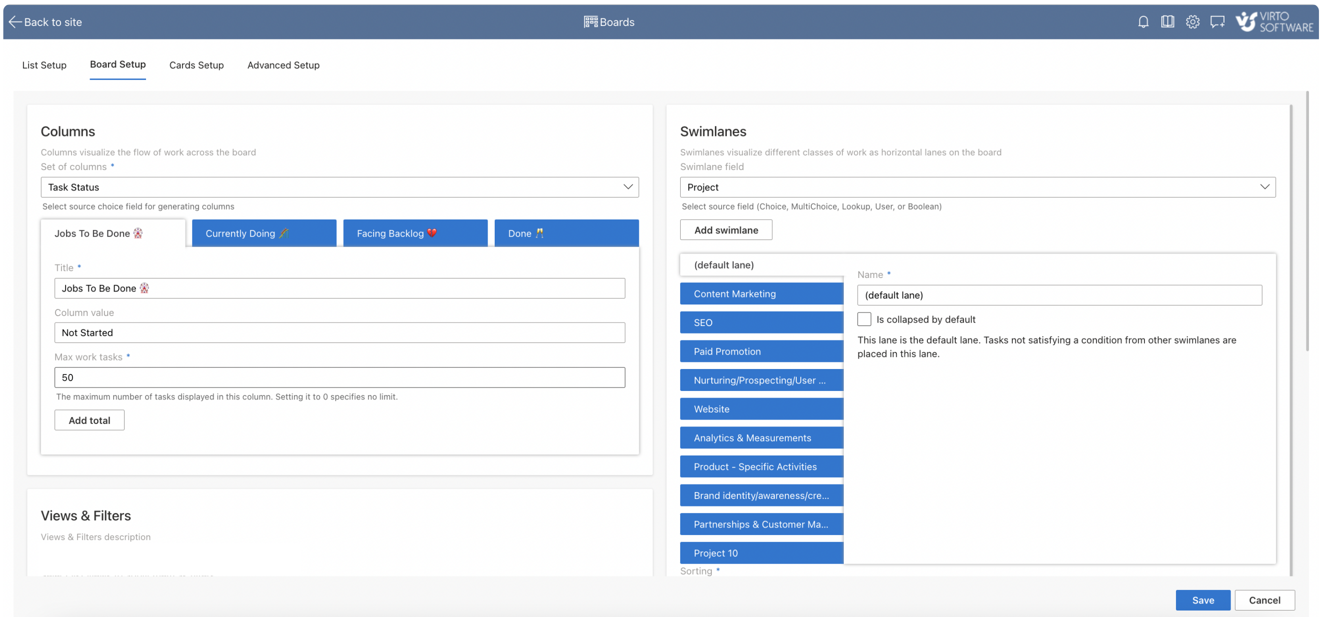
Click "**Save & Close**".

Here's how swimlanes look like, viewed by project (you can hide or expand them by clicking "+" or "-" icon to the left of the project name):



Board with collapsed and expanded swimlanes

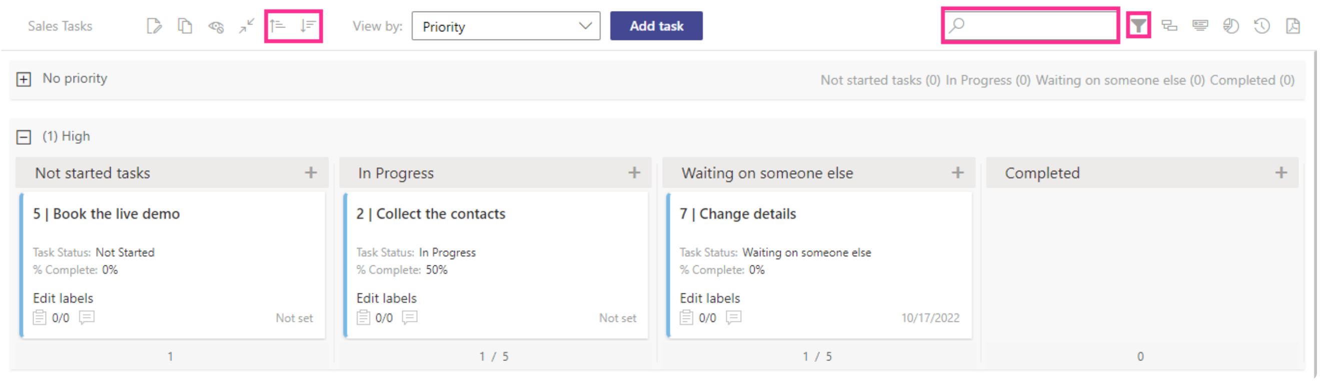
In board's settings you can edit swimlanes' names and tick the box if you want to collapse the swimlane by default.



Swimlanes' settings

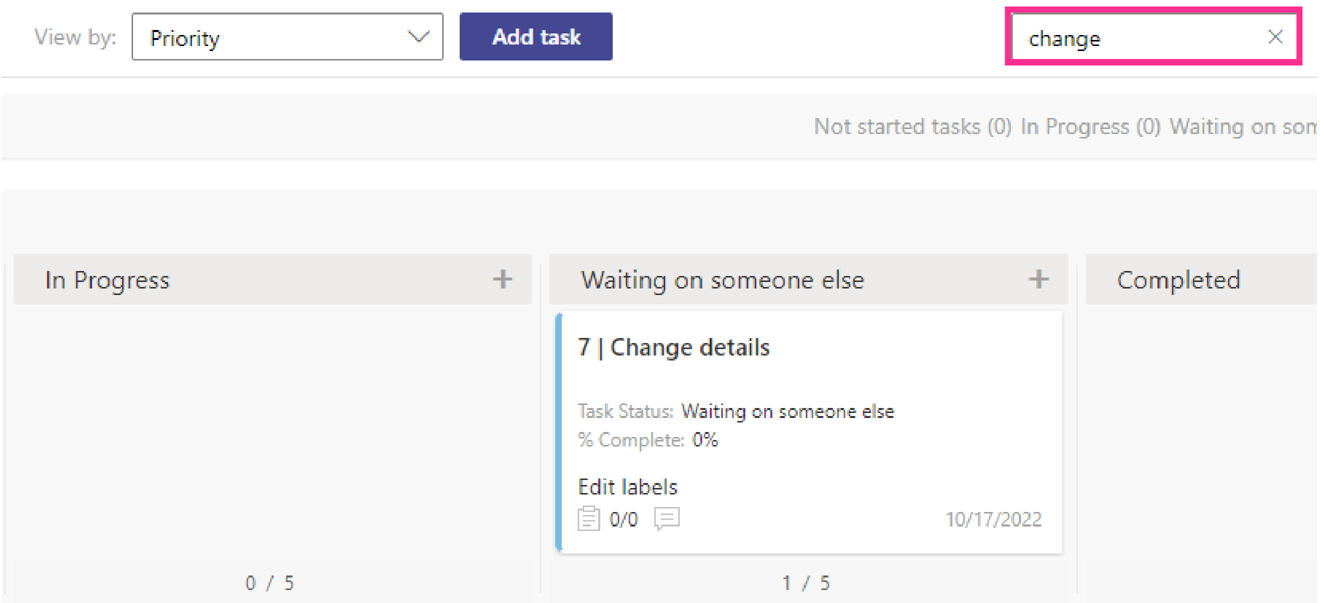
Filters

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



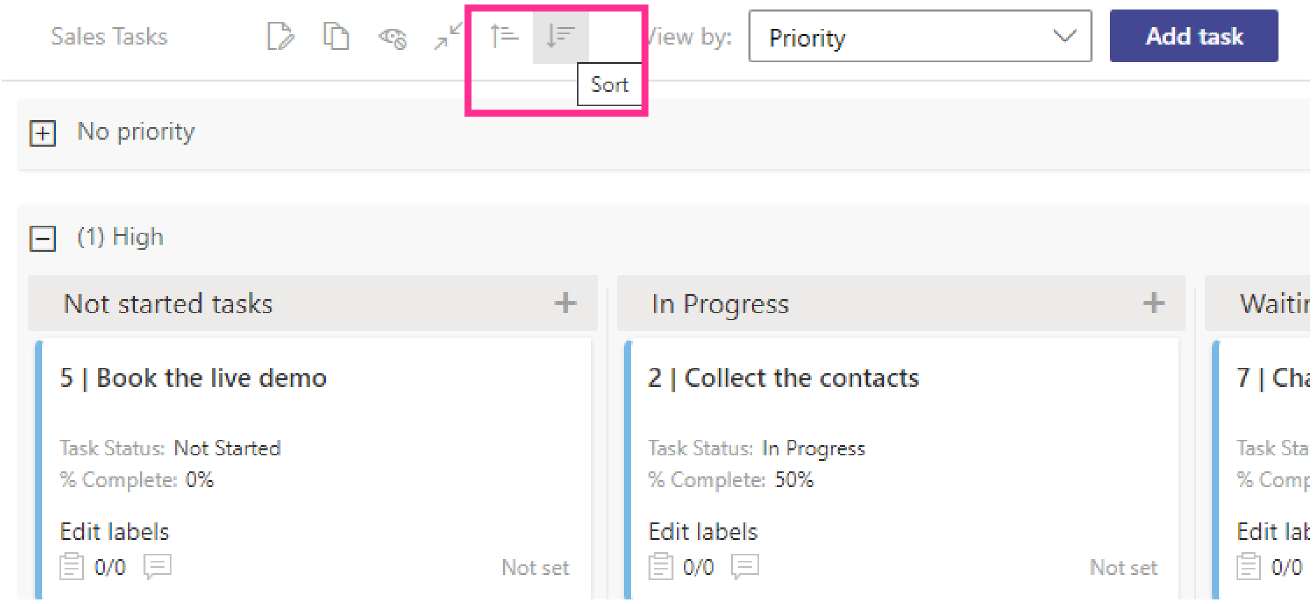
Filter options

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



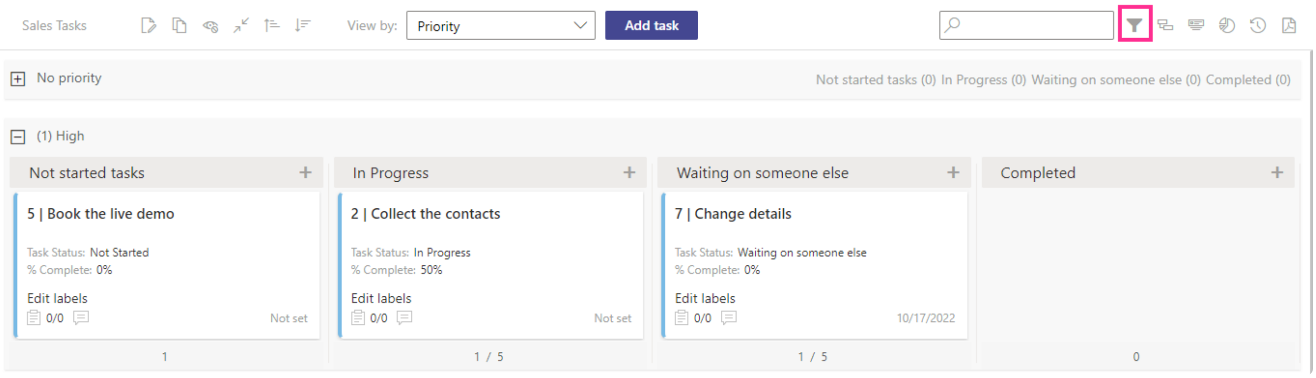
Search string

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



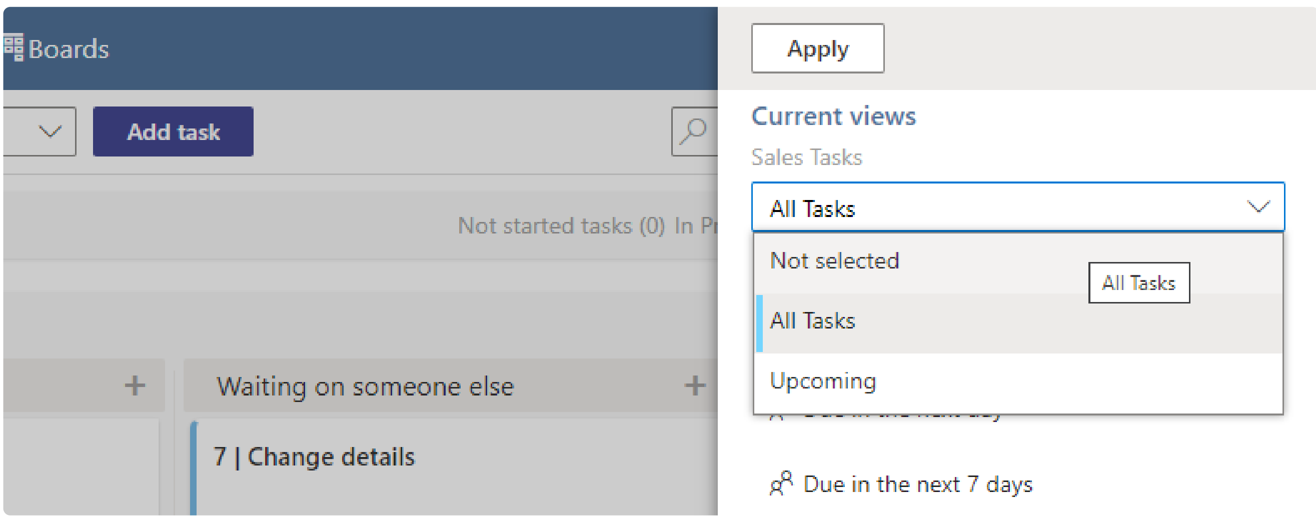
Sorting

Click the filter icon in the upper right corner to open filters.



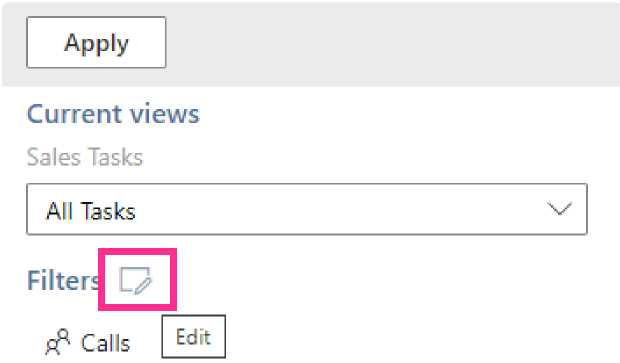
Filters

Select the required list view from the drop-down menu to filter tasks on the board. This option is available only if the view filter is adjusted in the settings.



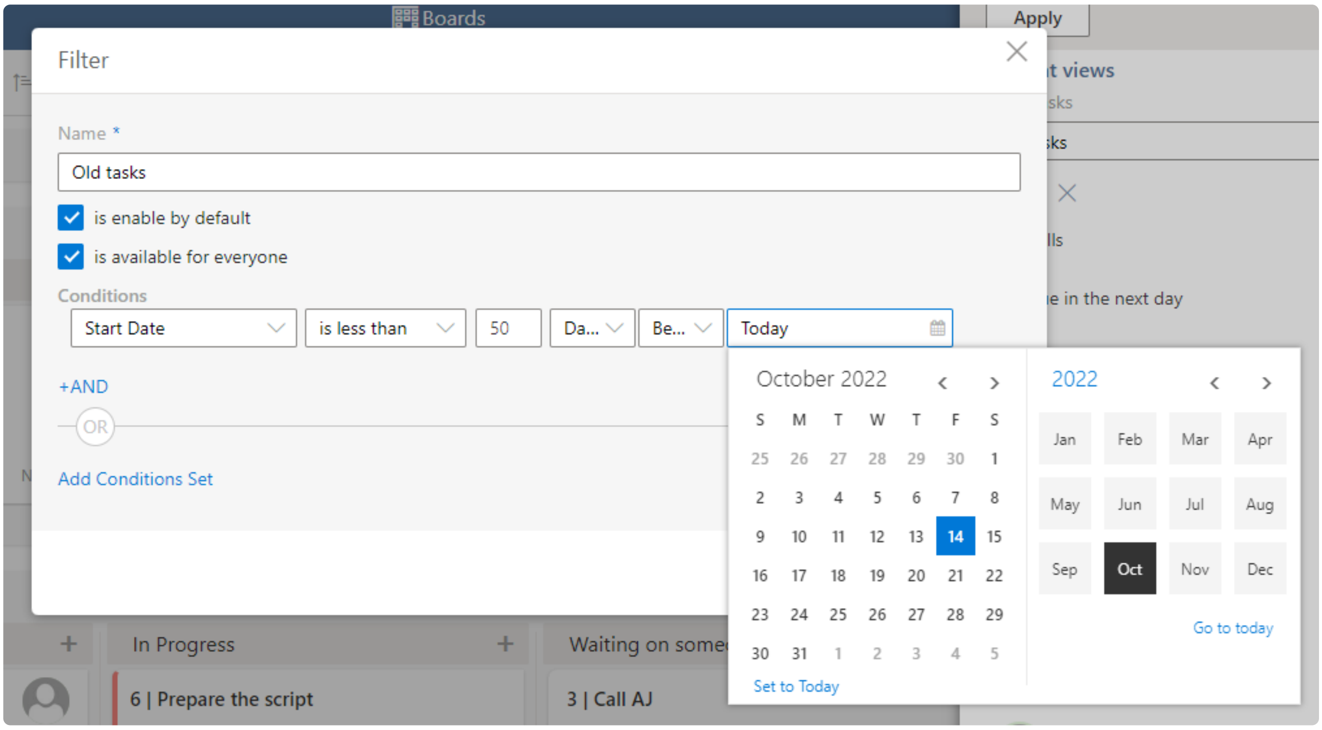
Choose view

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



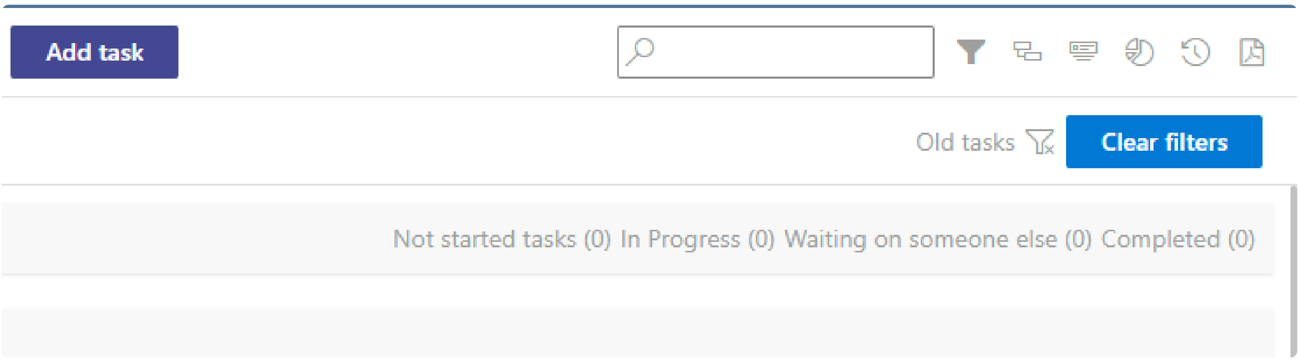
Add custom filter

Define the filter parameters according to your needs.



Create custom filter

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

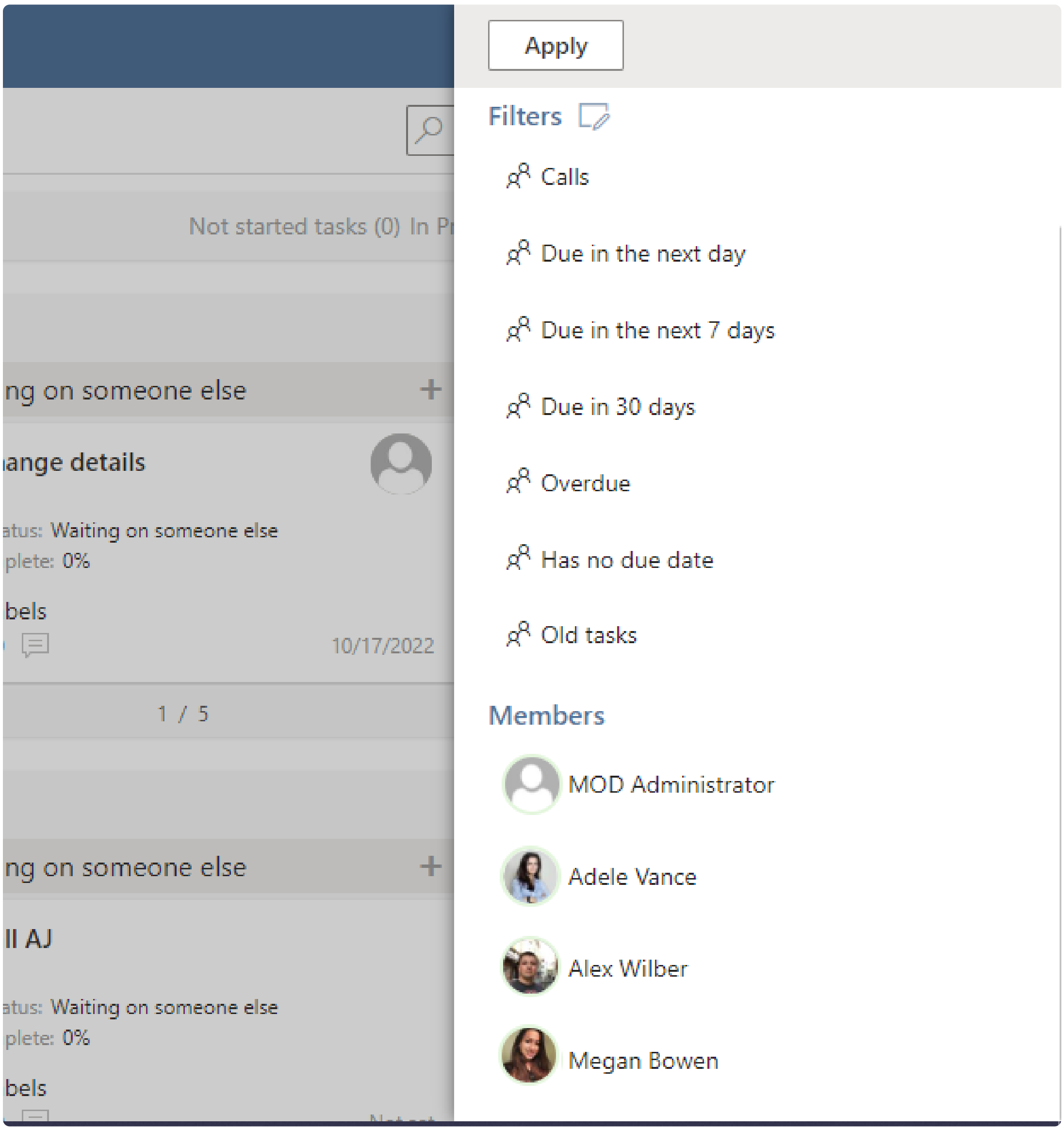


Clear filters

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

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

You can filter tasks by board members. Click on a user to see the tasks assigned to them.

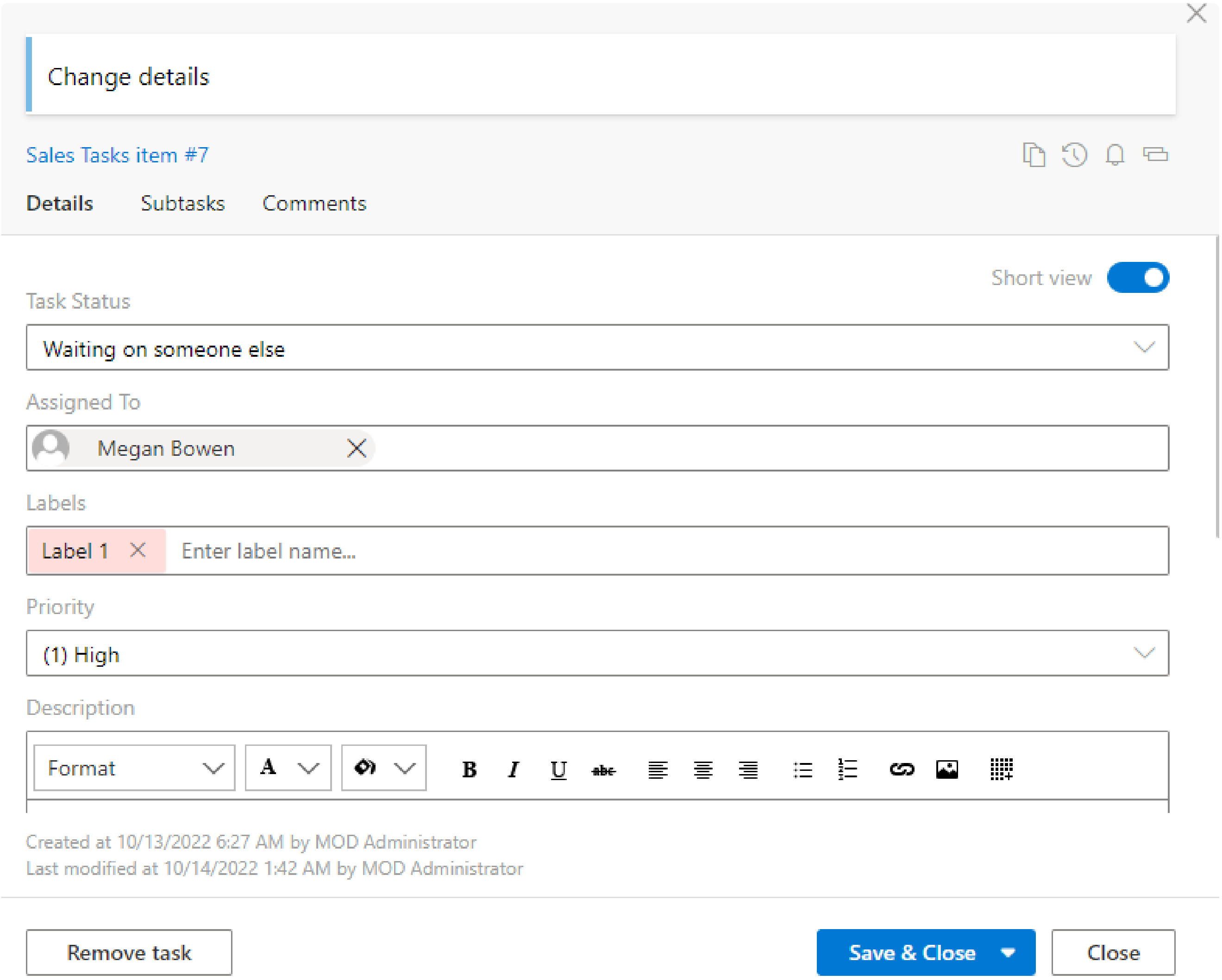


Filter by assignee

> The filters selected from the menu use “AND condition.” Filters by a user use “OR condition.”

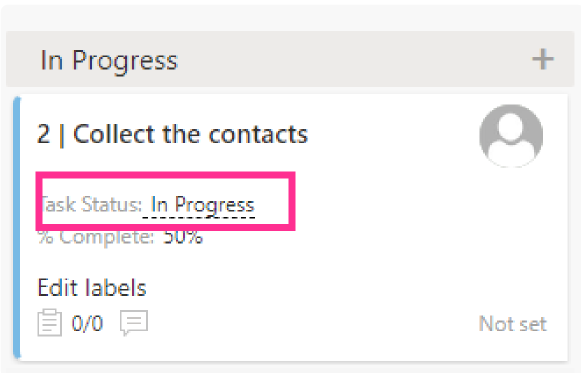
View and edit task

Click a task to view its details. Remember that you can switch between the **short view and the full view**.



Task view form

You can edit card fields underlined with a dotted line directly on the board without opening the form.

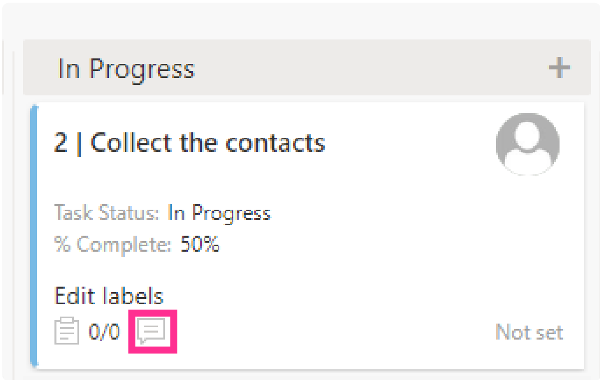


Edit task on the board

*If you change the percentage complete to 100, the task will be automatically moved to the "**Completed**" column.*

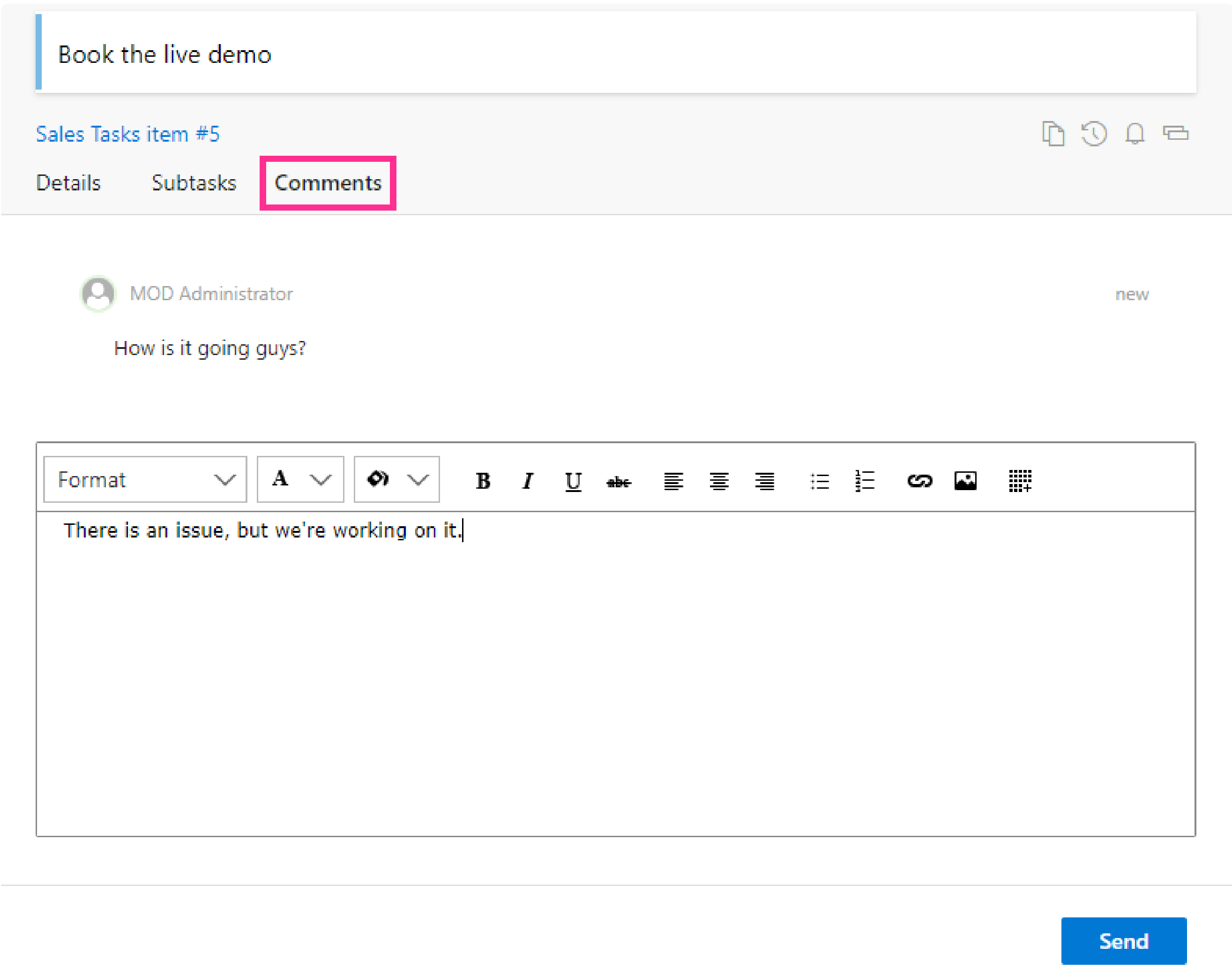
Comments

Team members can leave comments on the board tasks. To add a new comment, double click the comments icon in the task card.



Add comment icon

The “**Comments**” tab will open in the task form. Leave a comment here.

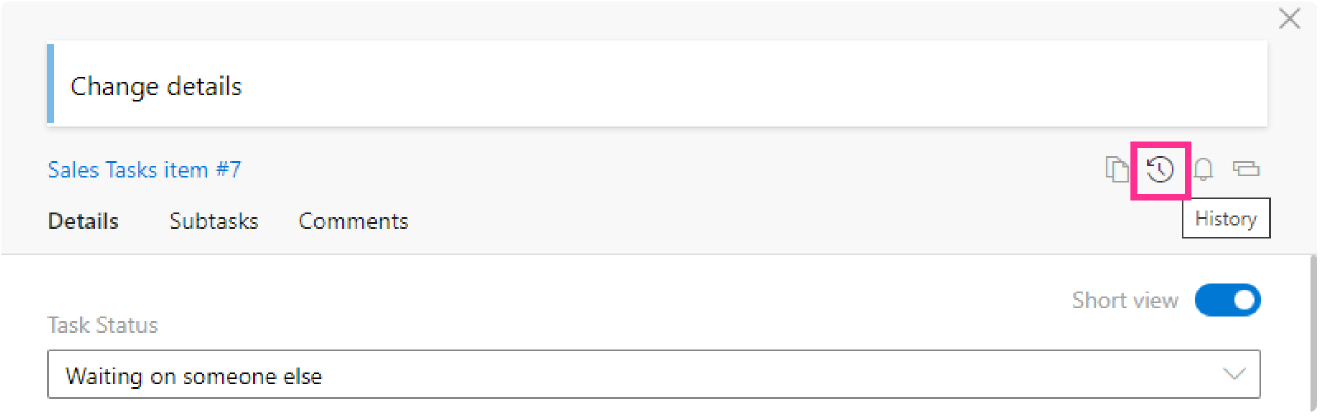


Leave a comment

Task and board history

Task History

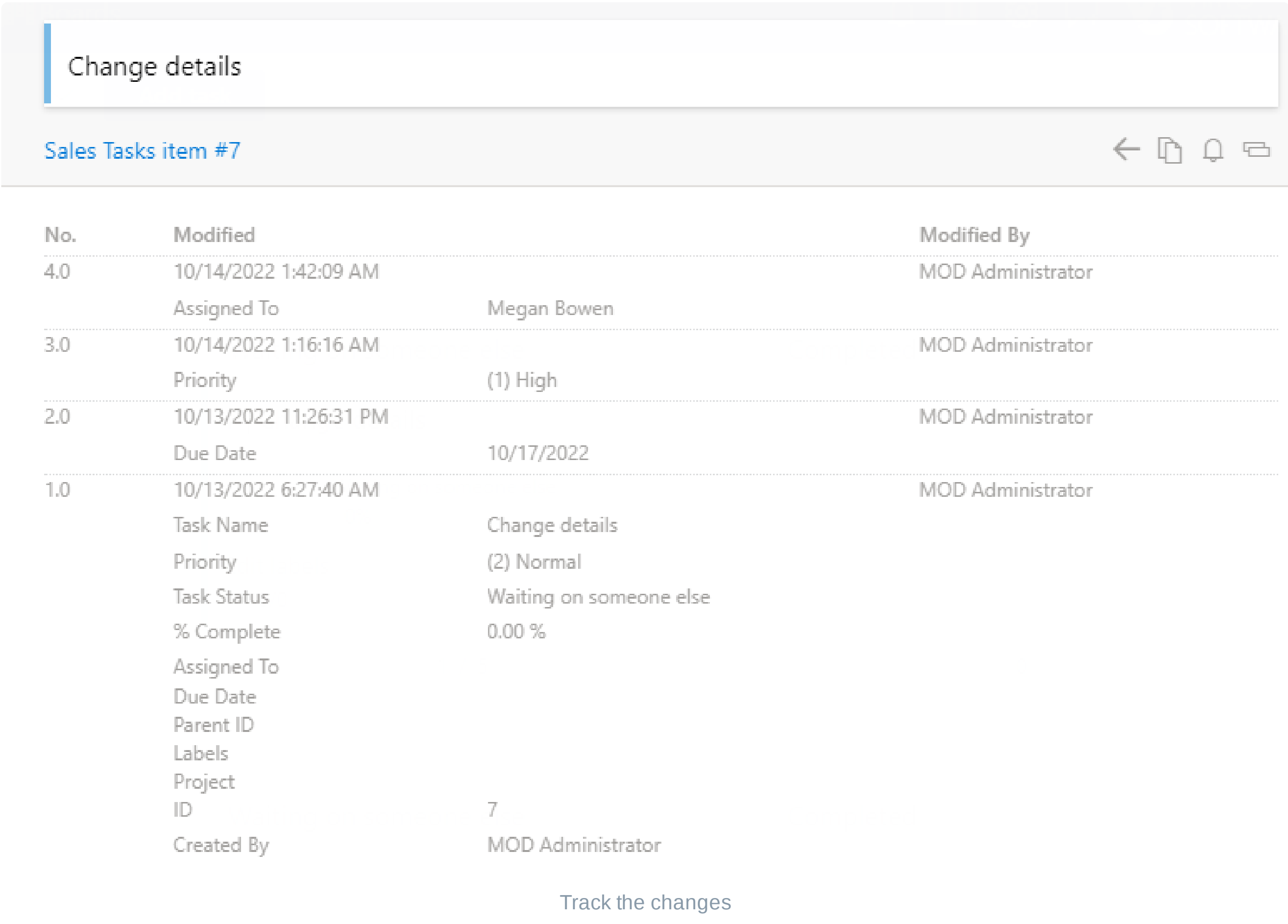
Task history is available in the task view form.



Task history

> *Make sure the "Item Version History" option is enabled in the SharePoint list versioning settings.*

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



Any changes to attachments and pictures are not displayed in either the task or board history.

Clone task

You can clone a task to copy its details by clicking the clone task icon in the task form.

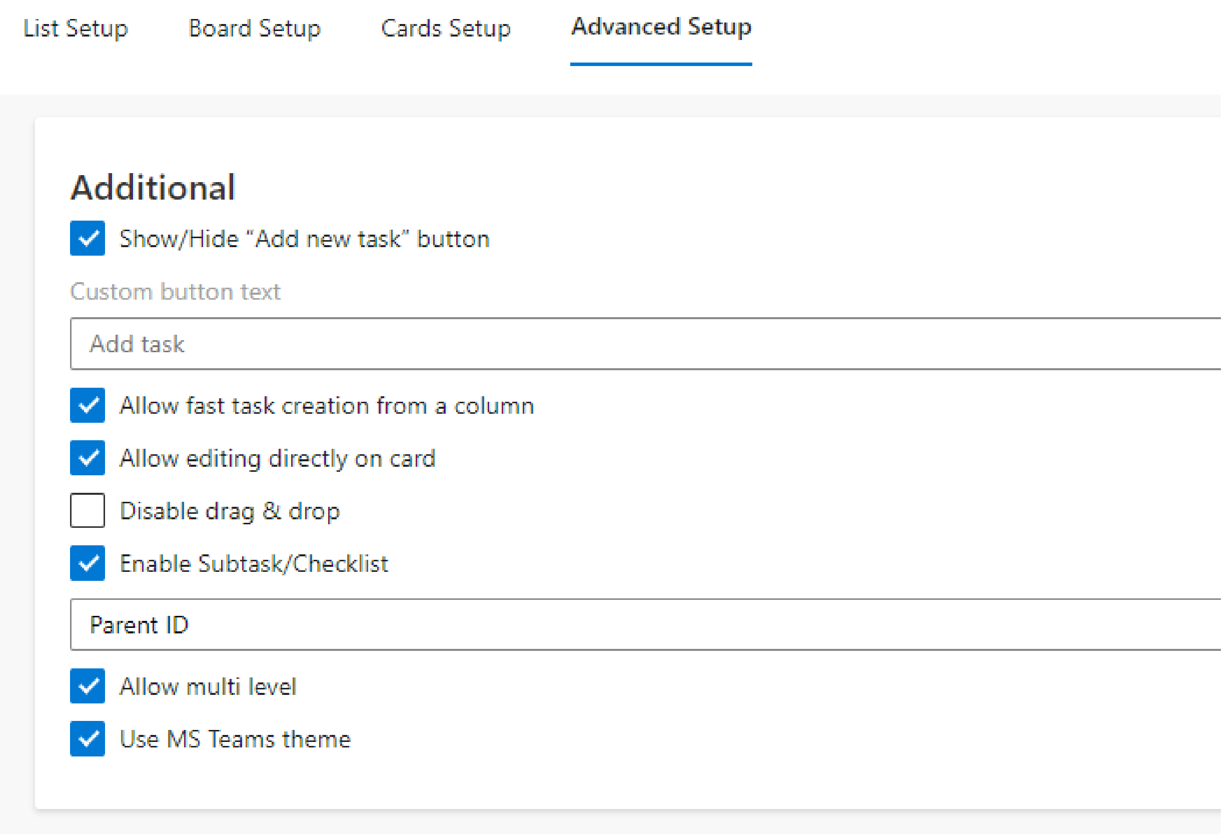
Clone task

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

Subtasks

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

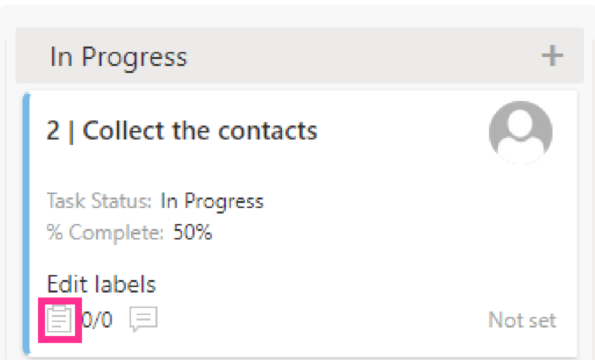
Go to the “**Advanced Setup**” tab and tick the “**Enable Subtask/Checklist**” checkbox to start using subtasks.



Enable subtask mode

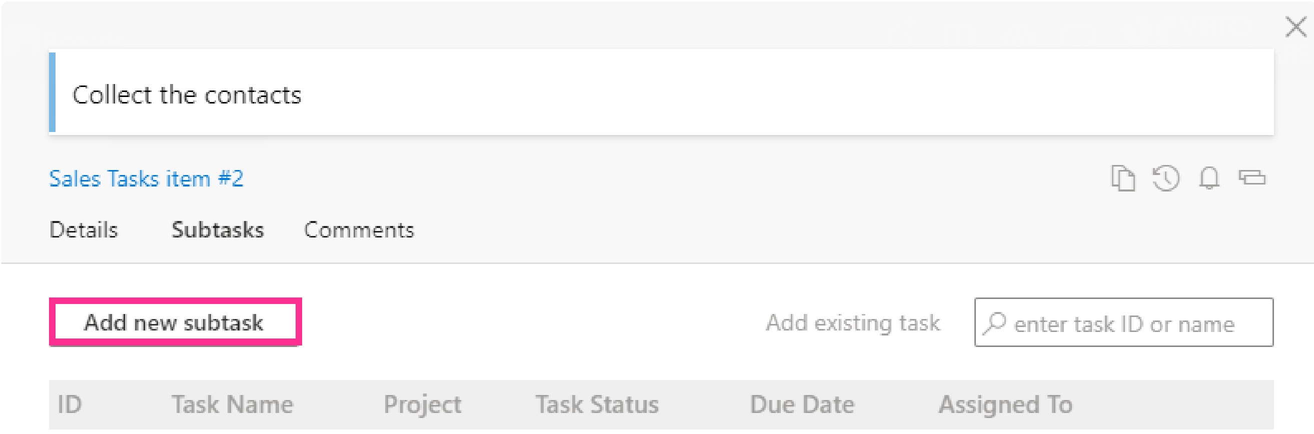
*If you check the box “**Allow multilevel**”, you can create subtasks for subtasks.*

Now click “**Add new subtask**.”



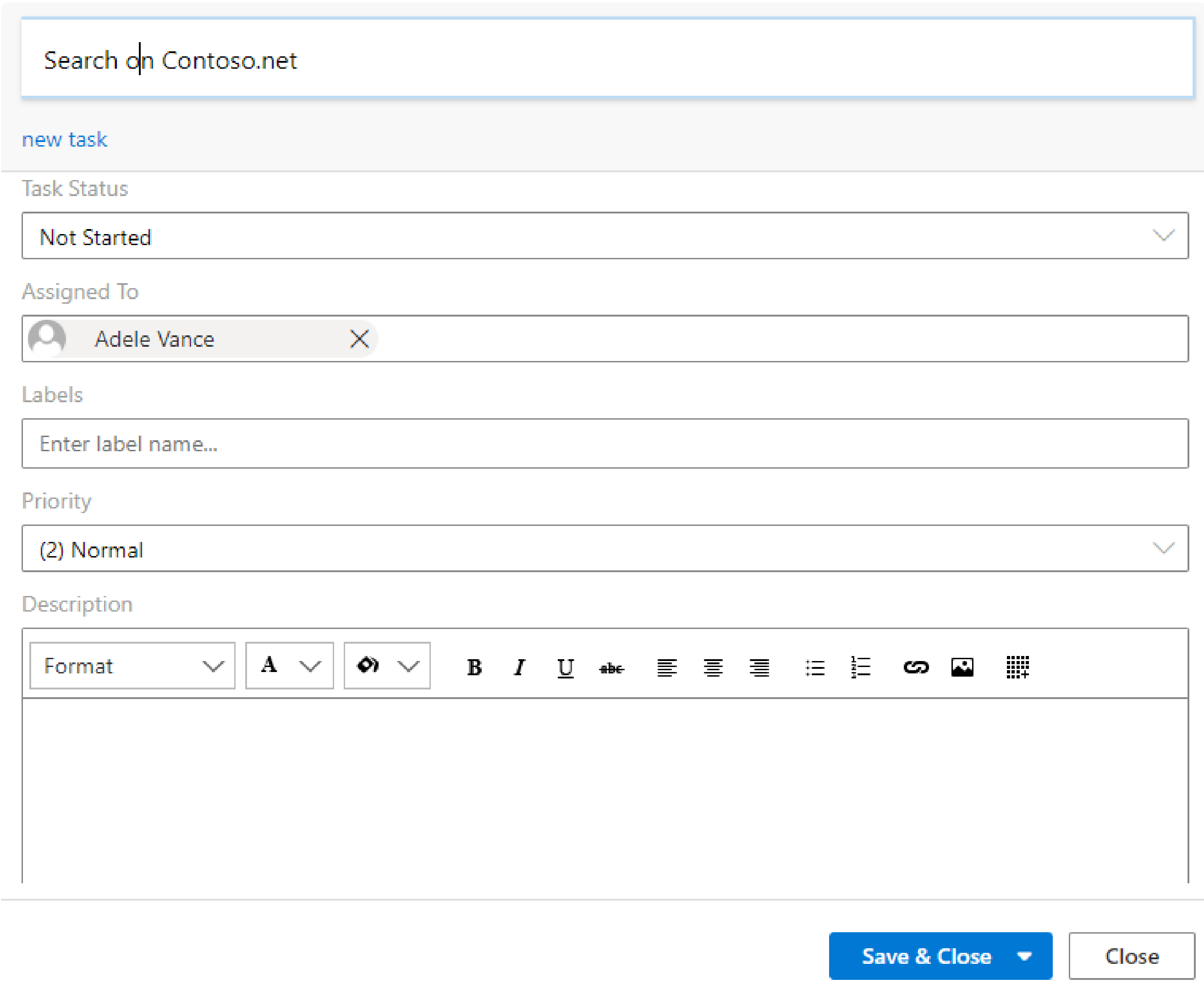
Add subtask icon

Now click the "Add new subtask."



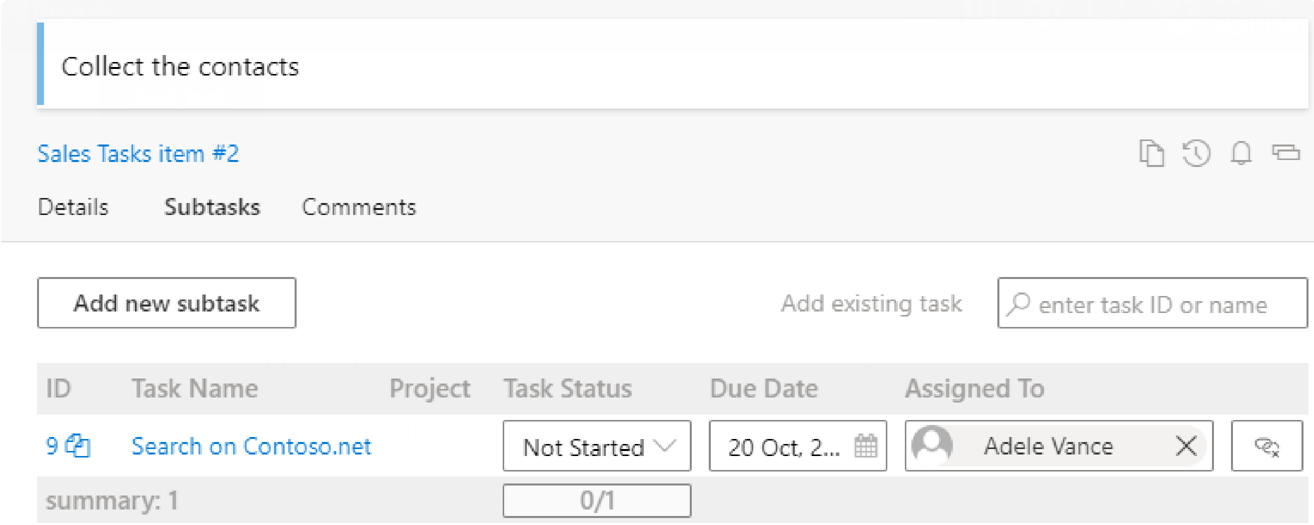
Add new subtask in the form

Fill in the form and save the subtask.



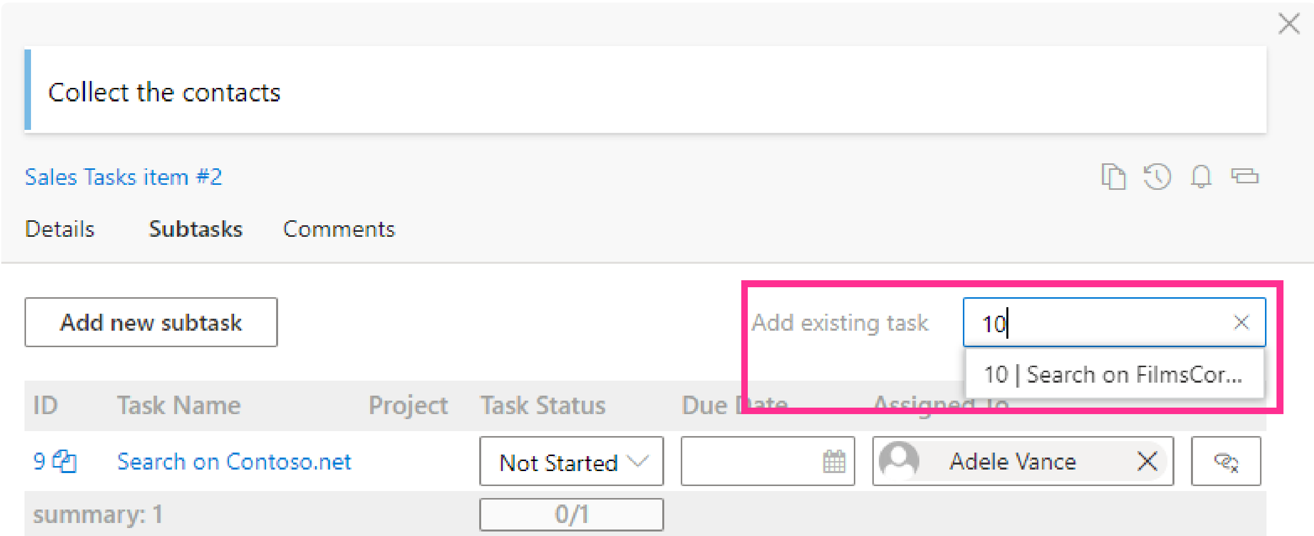
Fill in the subtask form

The subtask will appear in the list of subtasks.

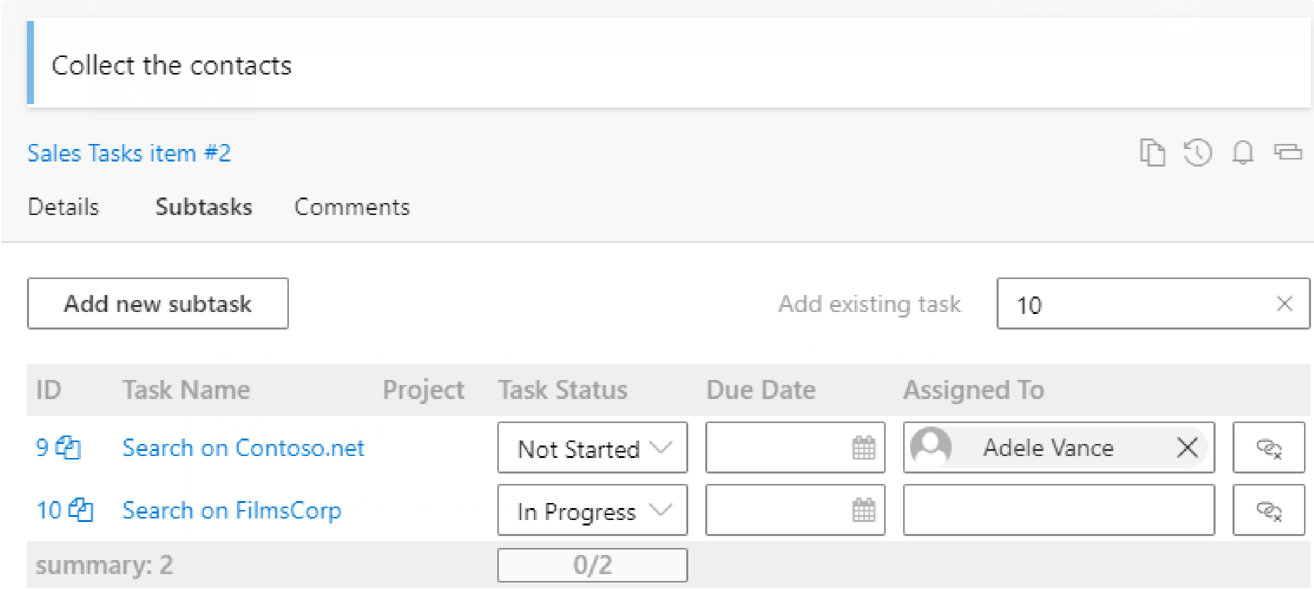


Added subtask

Additionally, you can choose an existing task to be a subtask instead of creating a new one. To do this, type the task ID or start typing the title into the “Add existing task” search box to find it.



Add existing subtask



List of subtasks

Parent ID field

Task lists use the parent ID field by default, but you can change this and use any other lookup field.

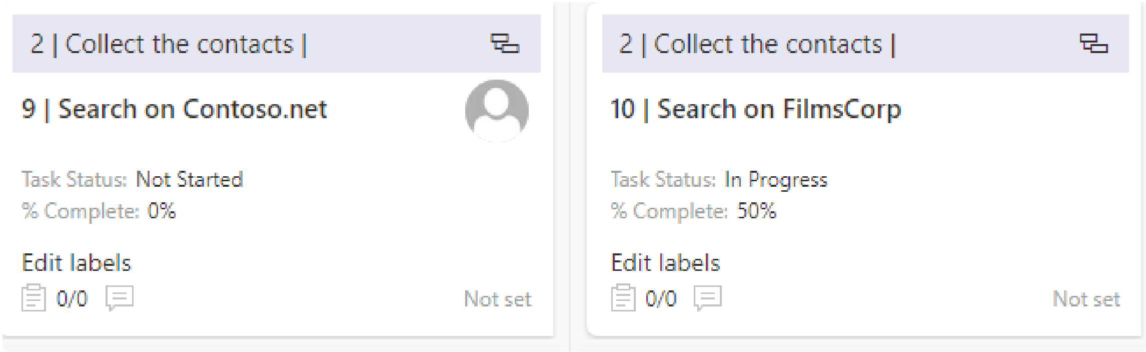
We use the parent ID field for quick boards because the board is made for a task list. This provides the maximum compatibility with tools such as Microsoft Project, Gantt, etc.

> 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 create 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

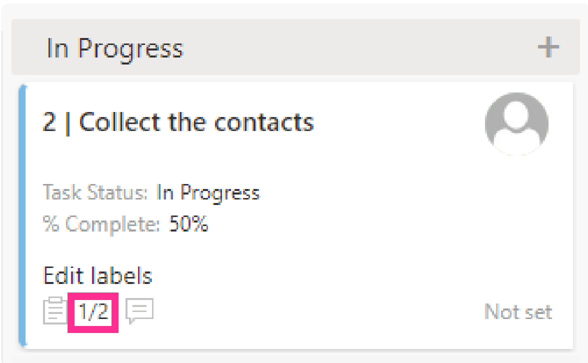
On your kanban board, subtasks will also display the name of their parent task on a blue background. In the example below, you can see two subtasks of the “Collect the contacts” task.



Subtasks

Subtask counter

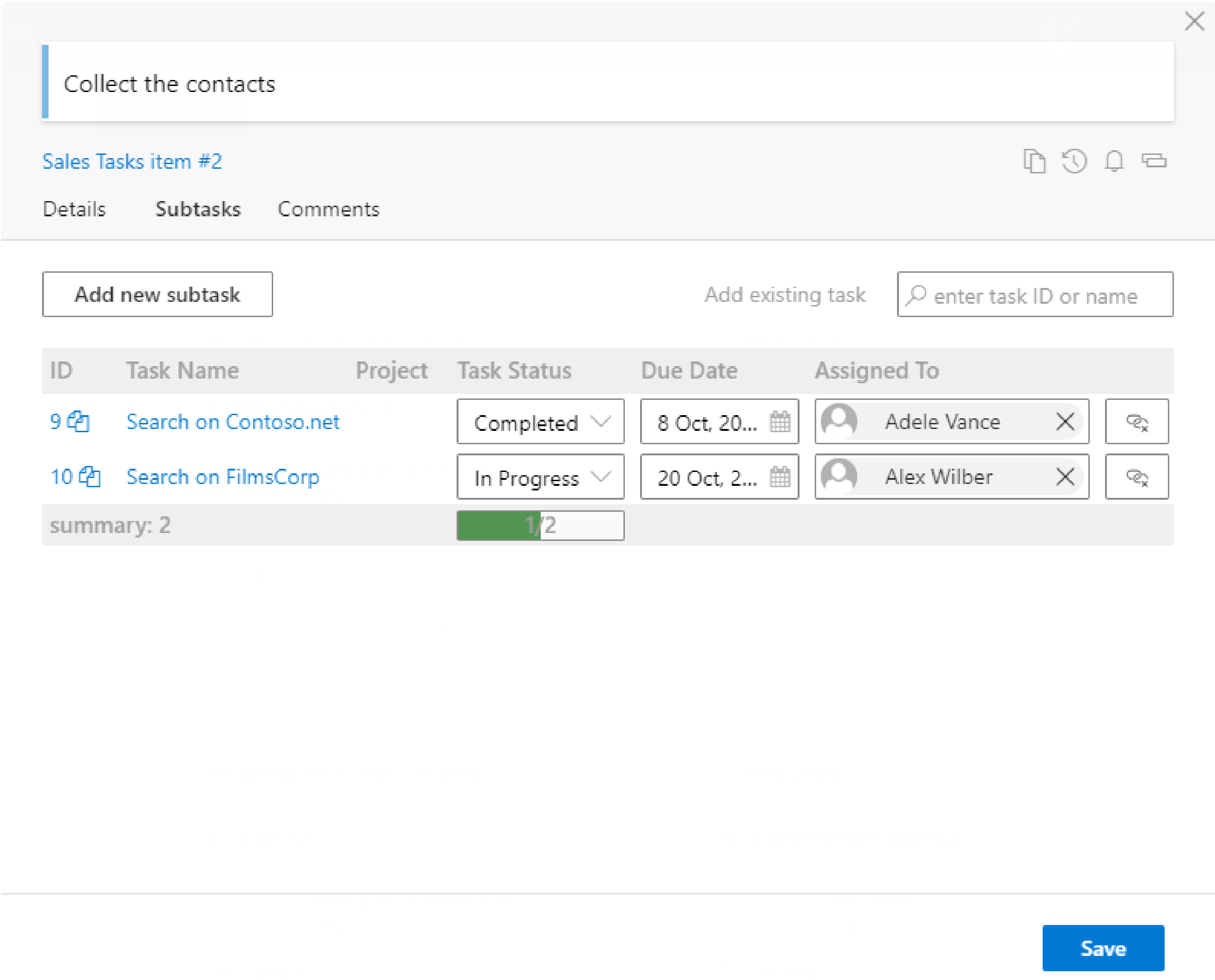
You can track how many subtasks the parent task has with the help of the subtask counter. This will also appear on a card when you enable subtasks for the board. In this case, “1/2” means that the parent task has two subtasks and one of them is already completed.



Subtask counter

Edit subtasks in the subtasks tab

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



Edit subtasks

Use the subtasks feature for situations when tasks need to be split into smaller steps or when you need to add a checklist to a task.

Charts

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

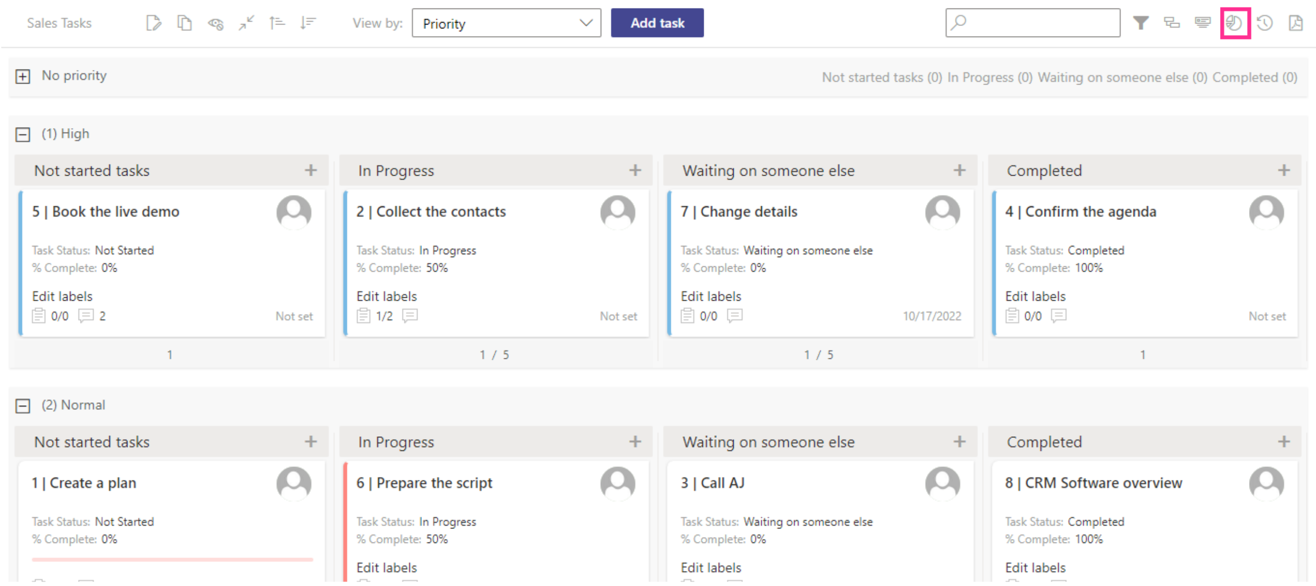
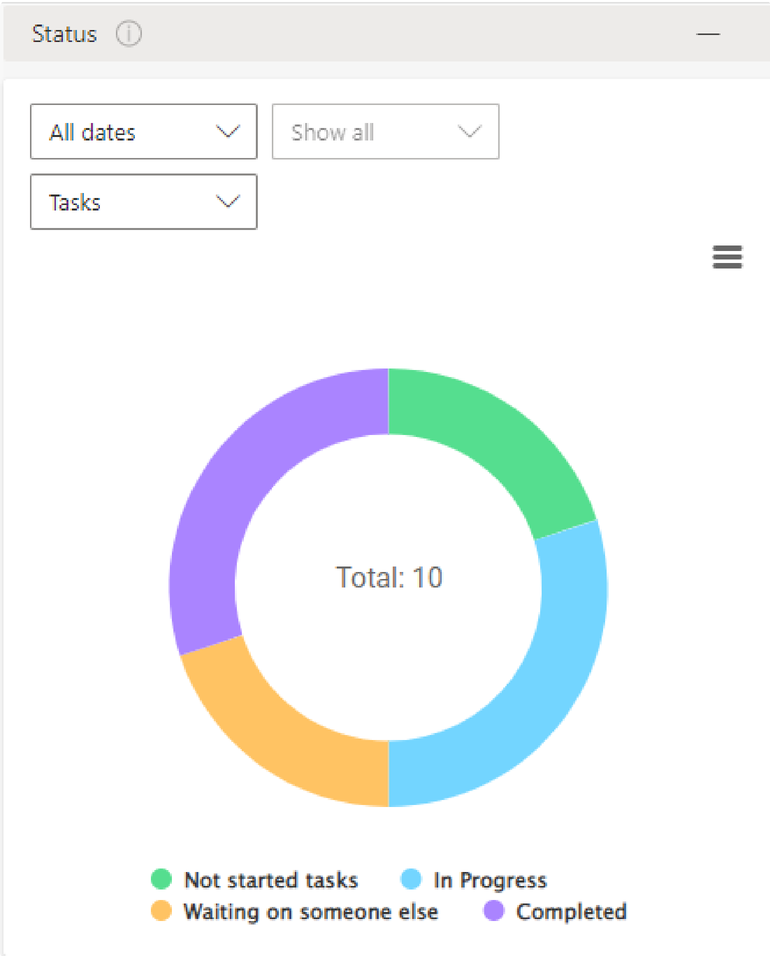


Chart icon

Here you can see task statistics displayed in five graphs: “Status”, “Assigned to”, “Completion”, “Burndown”, and “Lead Time.”

Status chart

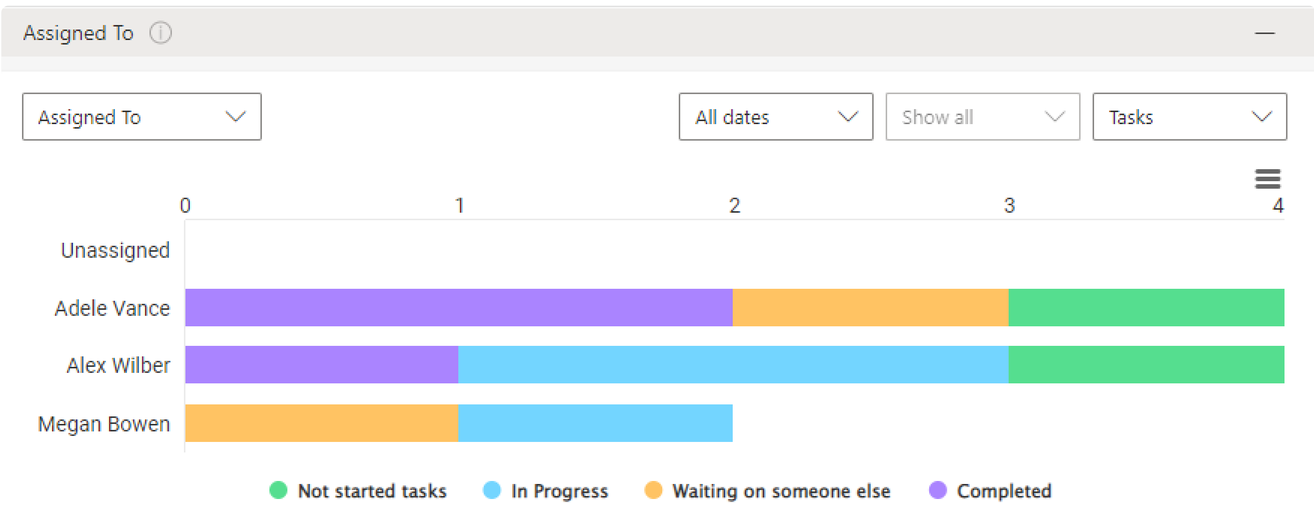
This is a pie chart with tasks grouped by status. In the drop-down menu, select the field you need to analyze, for example, the due date, the time period to analyze, and the unit—number of tasks, percentage, or budget. You can save this chart as an image.



Status chart

Assigned To chart

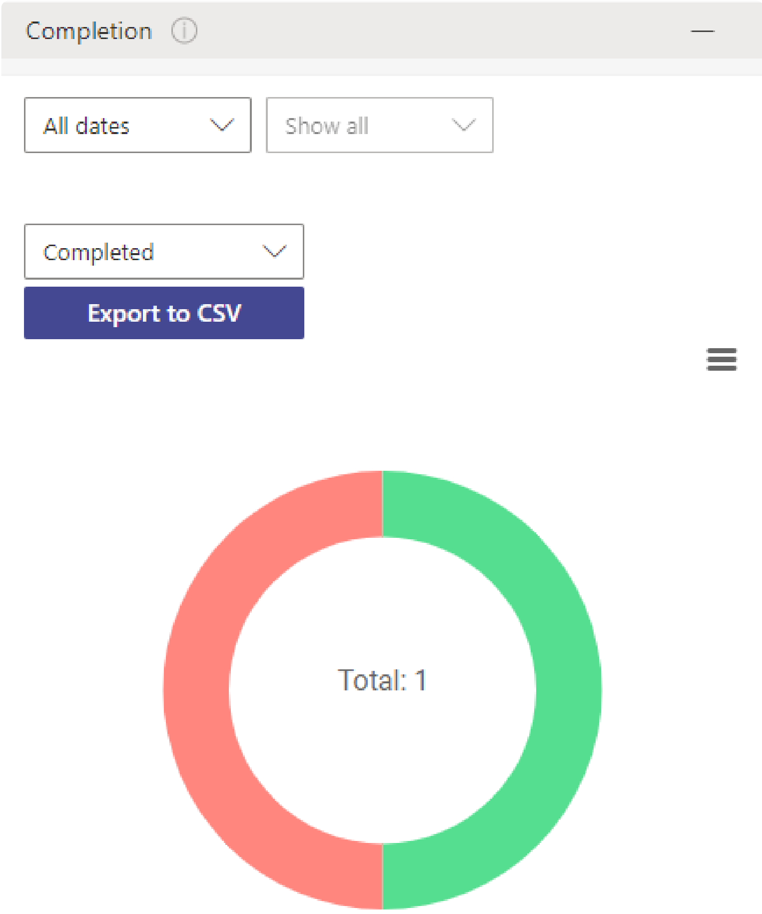
This is a graph with tasks grouped by assignees. It works in a similar way to the status chart. For example, here you can see the board members who modified tasks over the last month.



Members chart

Completion chart

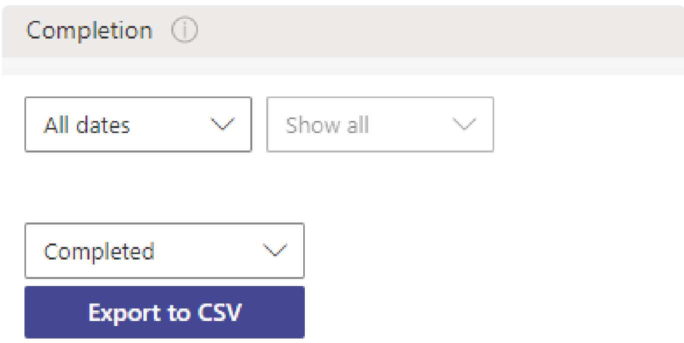
Use the completion chart to see tasks that were completed on time or went overdue. Since the data displayed in the chart comes from the SharePoint source list, completed tasks may also be in other columns, such as “Deferred” or “Need someone else.” You can add these to your report as well.



Completion chart

The “Completion” chart shows only tasks with a due date set. If a task has no due date, it does not appear here on this chart.

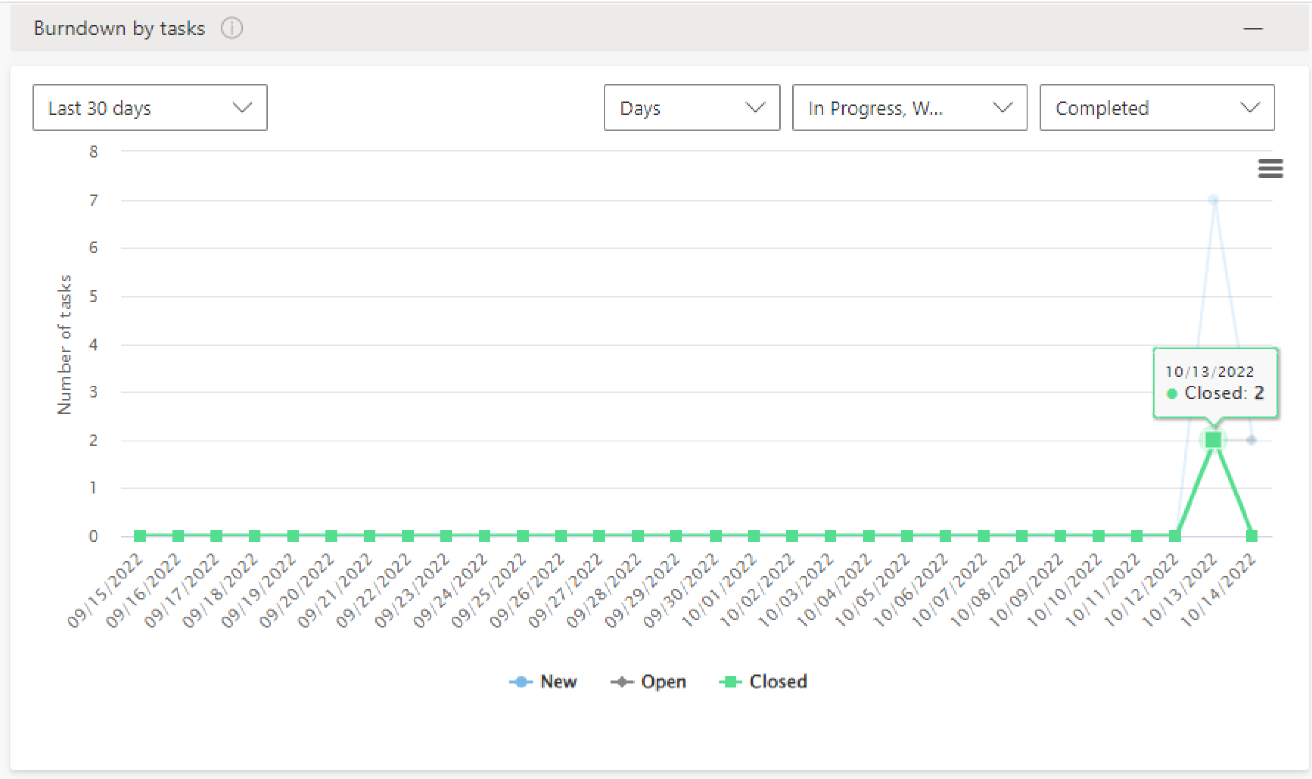
To see the completion report in detail, you can export the chart to a CSV file. In this format, you can sort the tasks and, for instance, see the team members responsible for the overdue tasks.



Export to CSV

Burndown chart

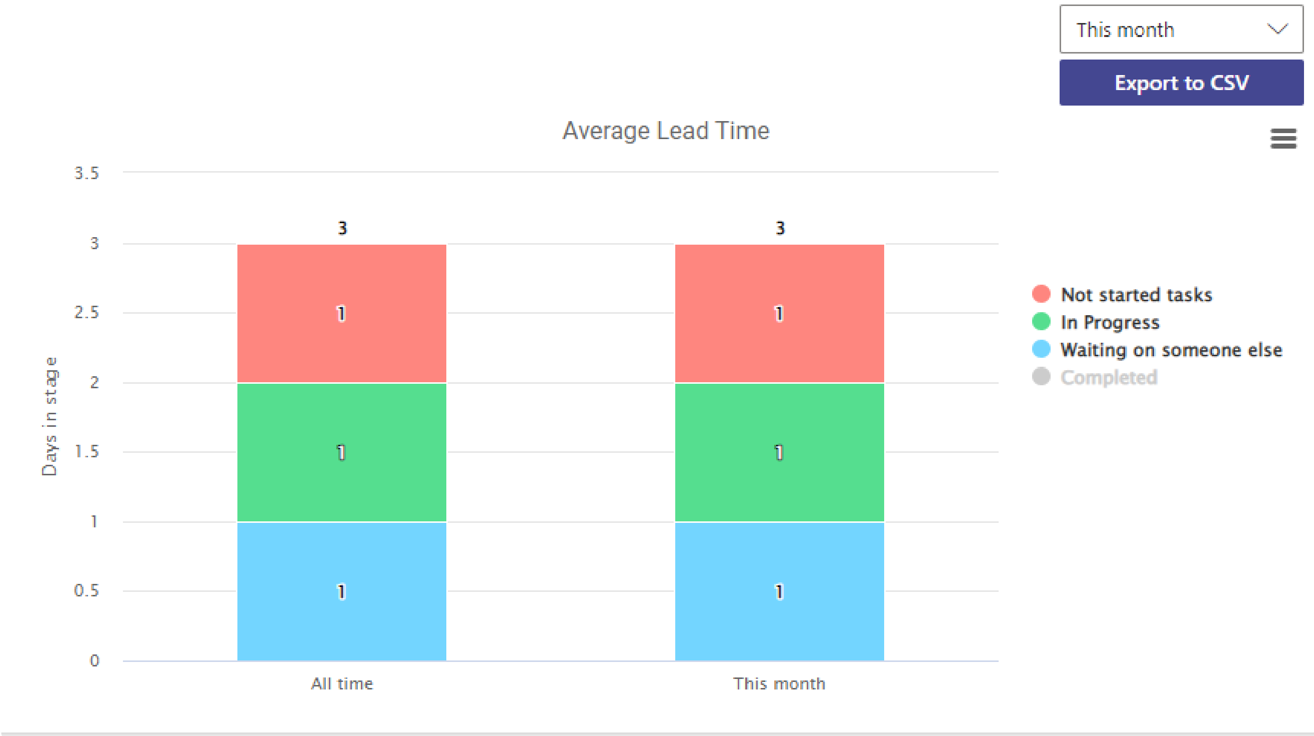
You can use the burndown chart to display the work remaining. The graph is formed automatically according to the tasks remaining on the board. Simply choose the desired period to analyze the efficiency.



Burndown chart

Lead time chart

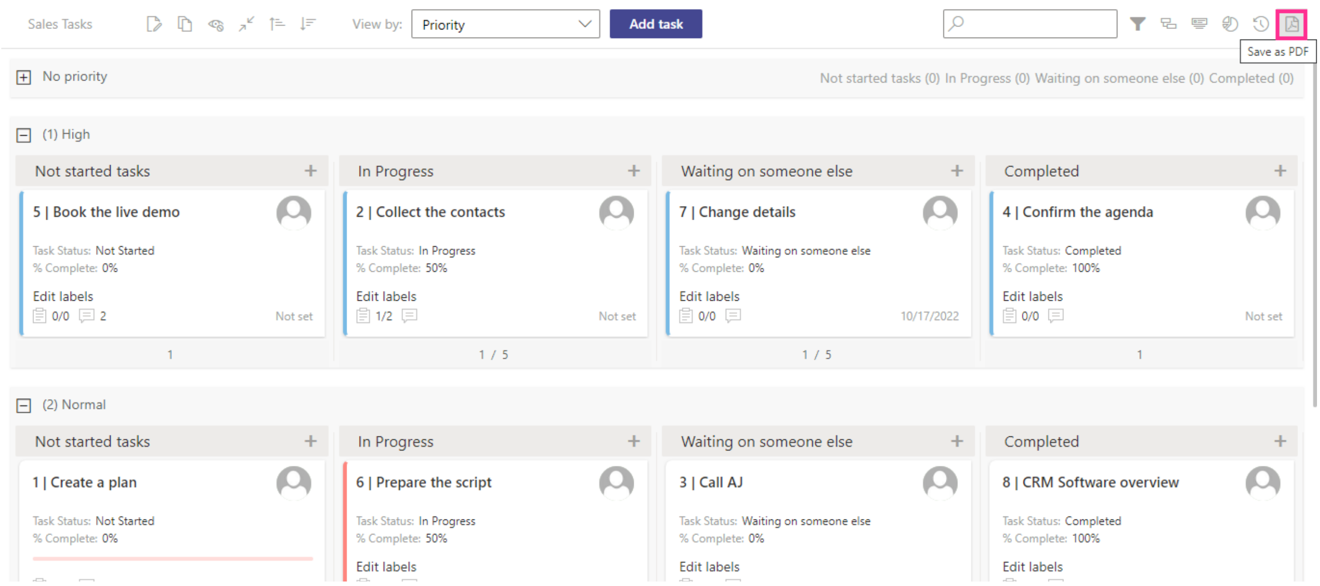
The lead time chart measures the total time elapsed from the creation of work items to their completion.



Lead time chart

Save to PDF

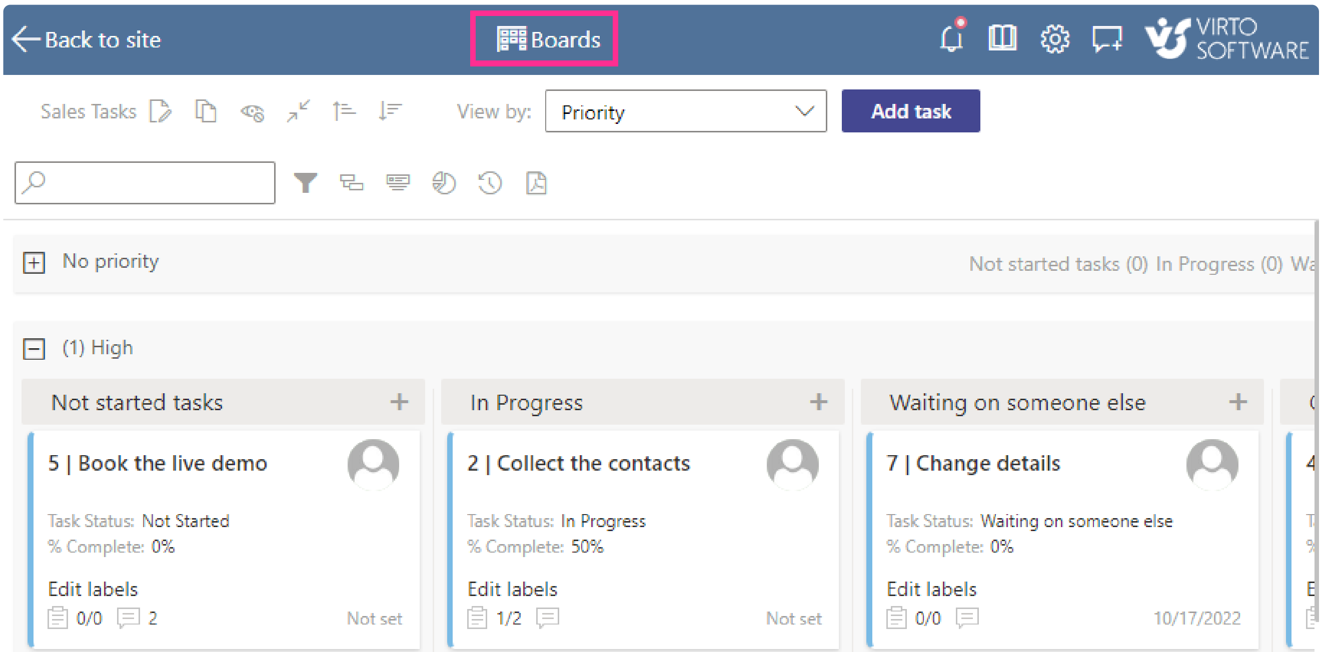
You can save your board as a PDF. Click the save as PDF icon in the upper right corner to save your board and choose the required format. You can also share or print this file.



Save to pdf

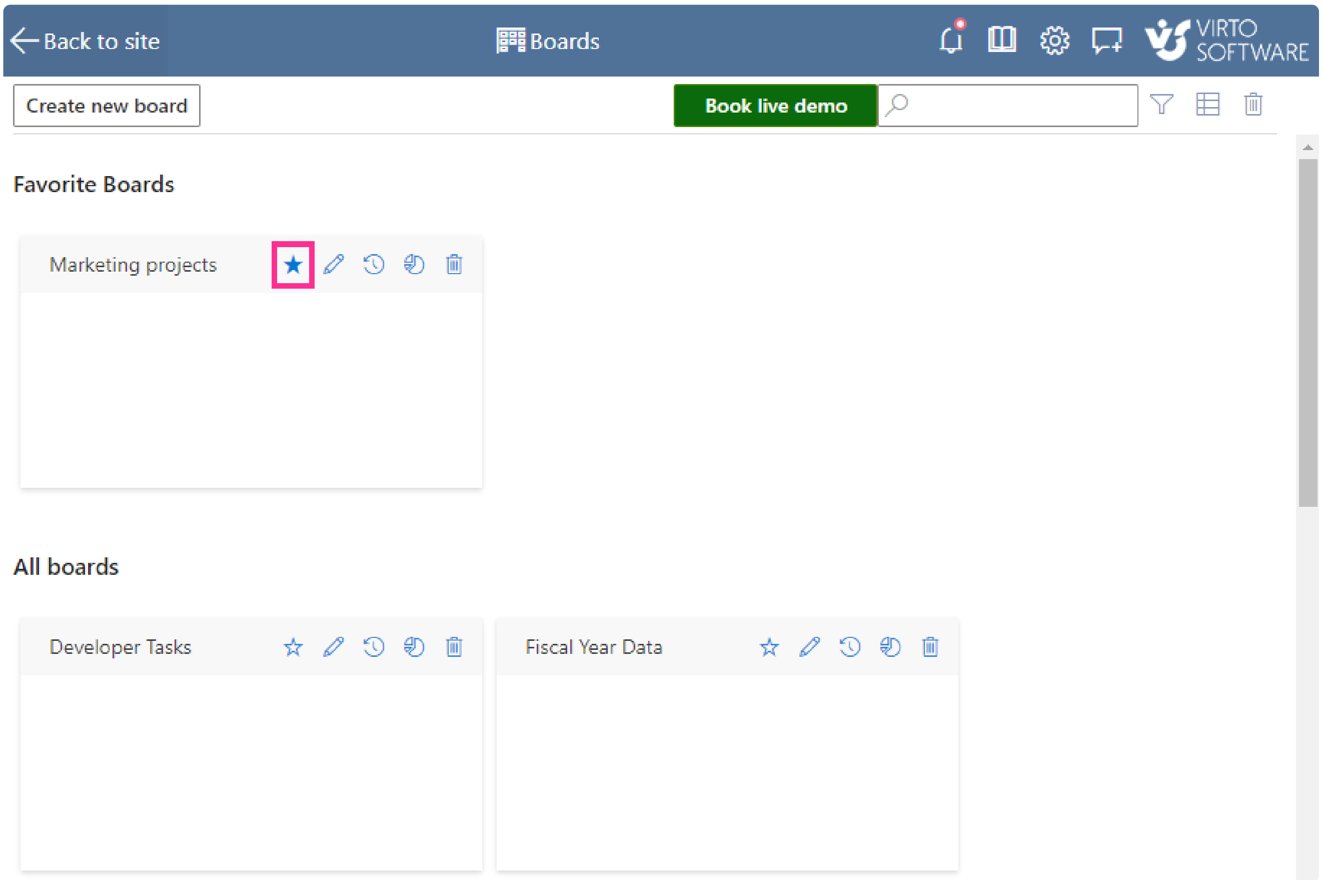
Managing boards

Click “Boards” at the top of the board to view all the kanban boards created on your SharePoint site.



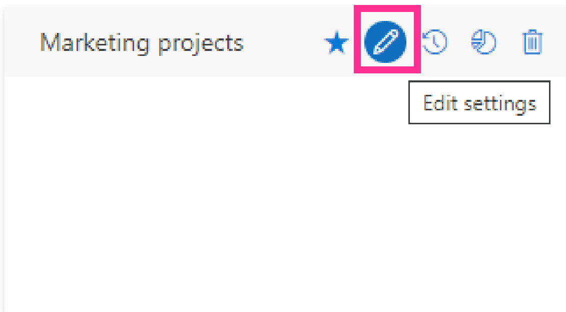
Boards

Add more boards, remove those that are no longer needed, or use the star icon to mark your most-used boards as favorites.



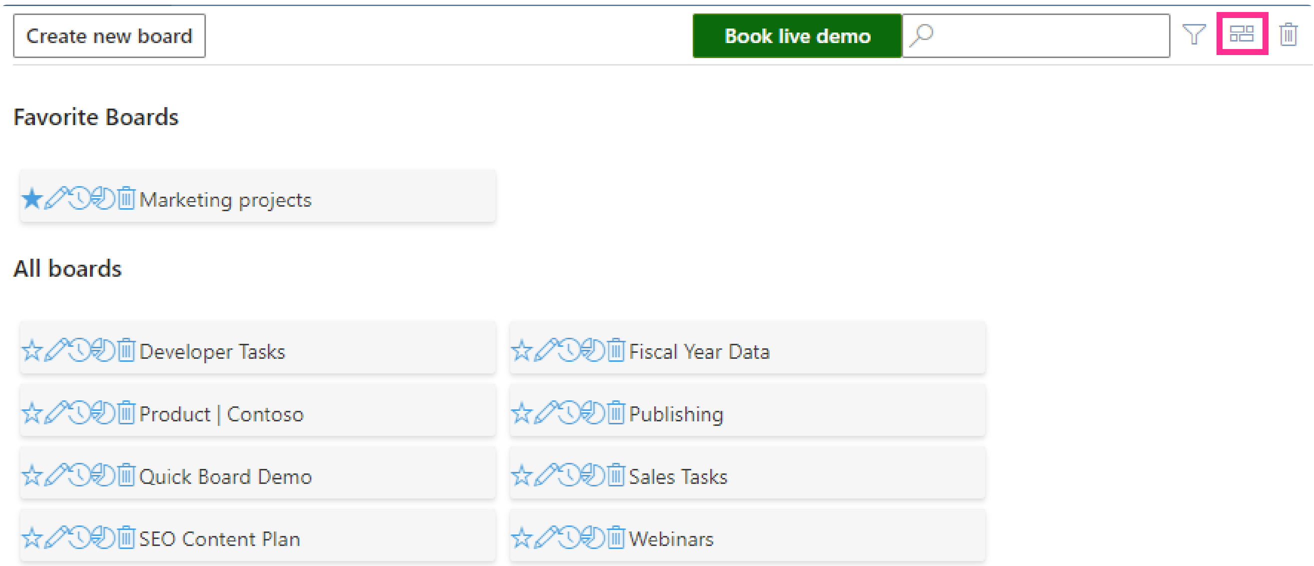
Favorite boards

You can edit board settings from this view, or you can go to the settings from within the board view by clicking the edit settings icon to the right of the board name.



Edit board

You can also view the boards as a list by clicking the icon in the upper right corner.



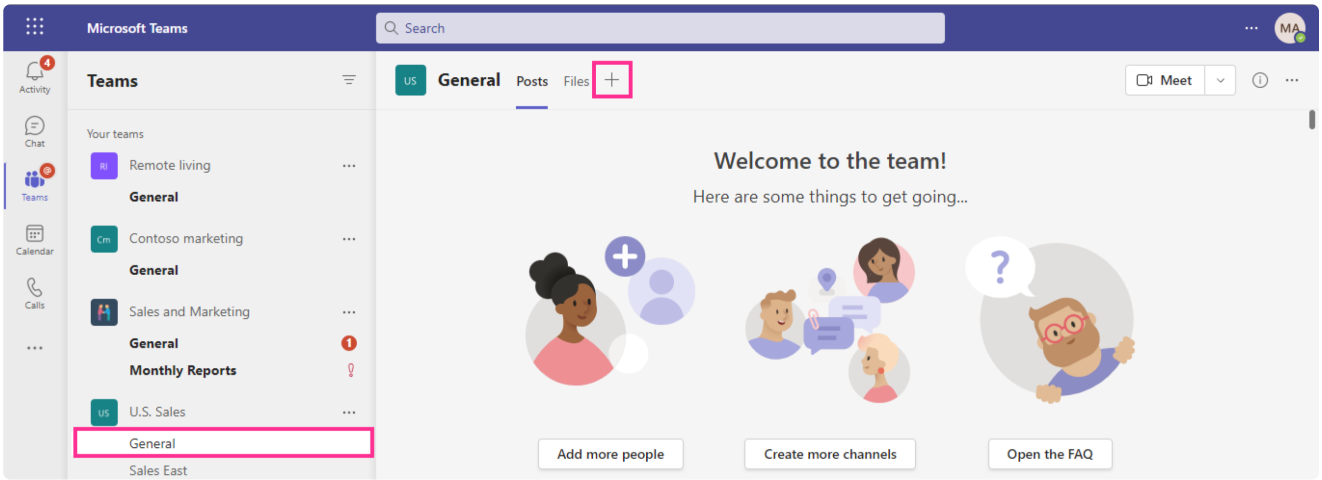
List of boards

Kanban Board in Microsoft Teams

You can add Kanban Board Pro by Virto to Microsoft Teams as a separate tab. This way, you won't need to switch between applications to manage your team's tasks.

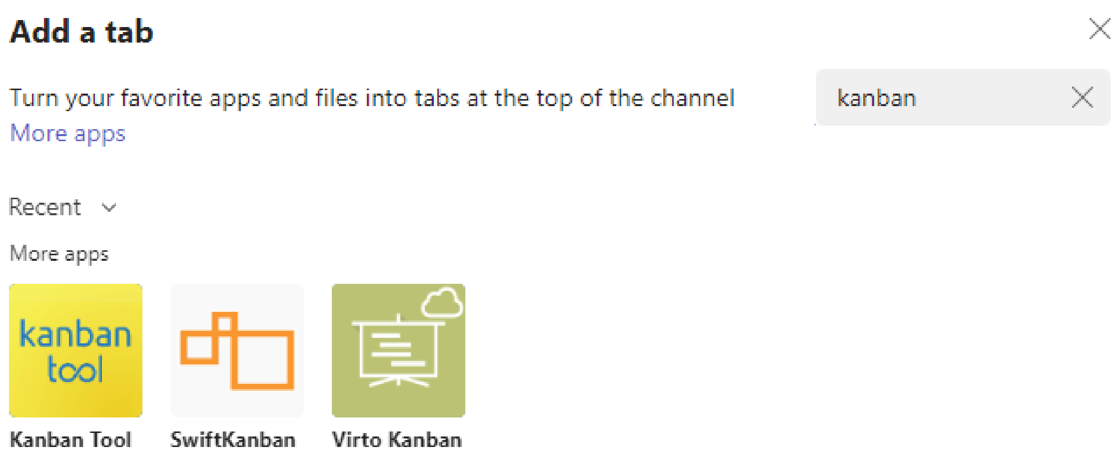
You can create and manage tasks as usual in Teams and adjust the board settings in SharePoint. Although customization of kanban boards is only available in the SharePoint environment, you can display and manage the board's tasks in Teams without access to settings.

The kanban boards in Teams inherit the user permissions from SharePoint and are invisible to external users in Teams. To add a board to Teams, open the channel and click "+."



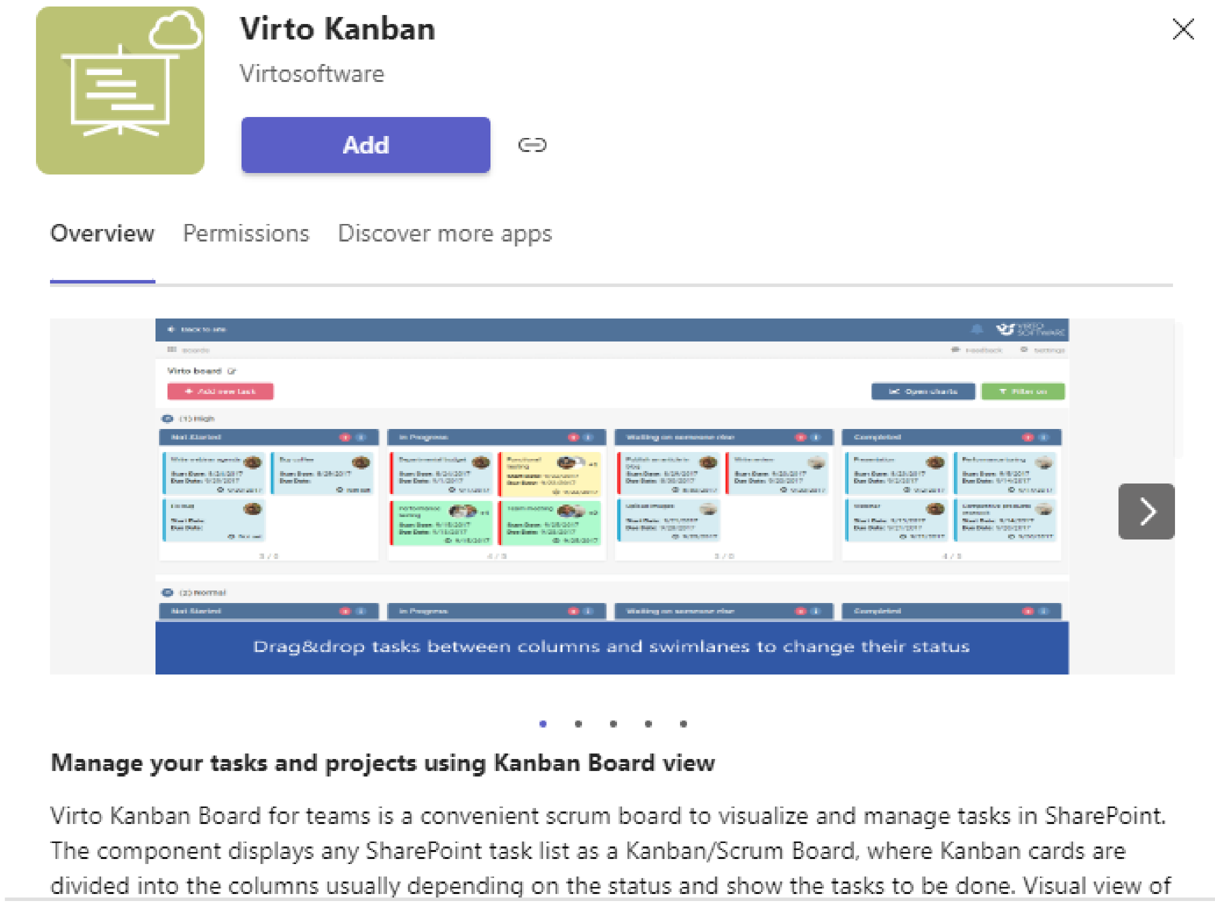
Add a tab

Find the Virto Kanban app and click on it.



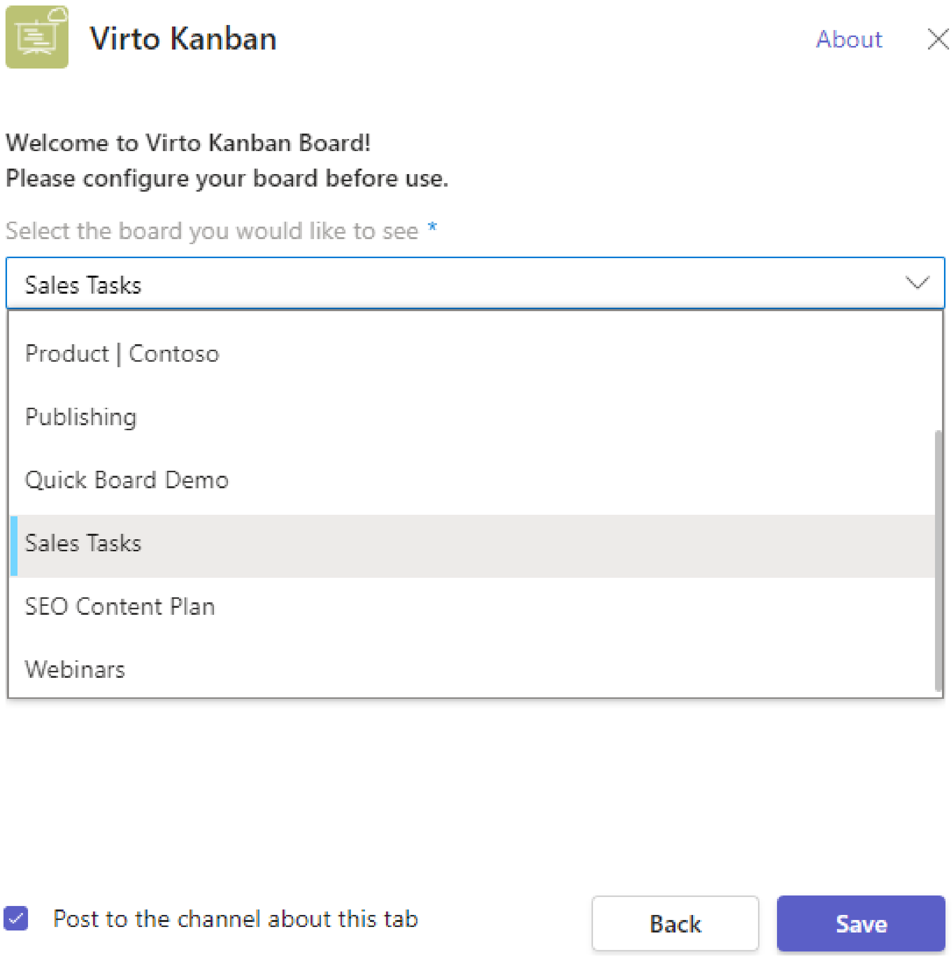
Find Virto Kanban

Now click "**Add**."



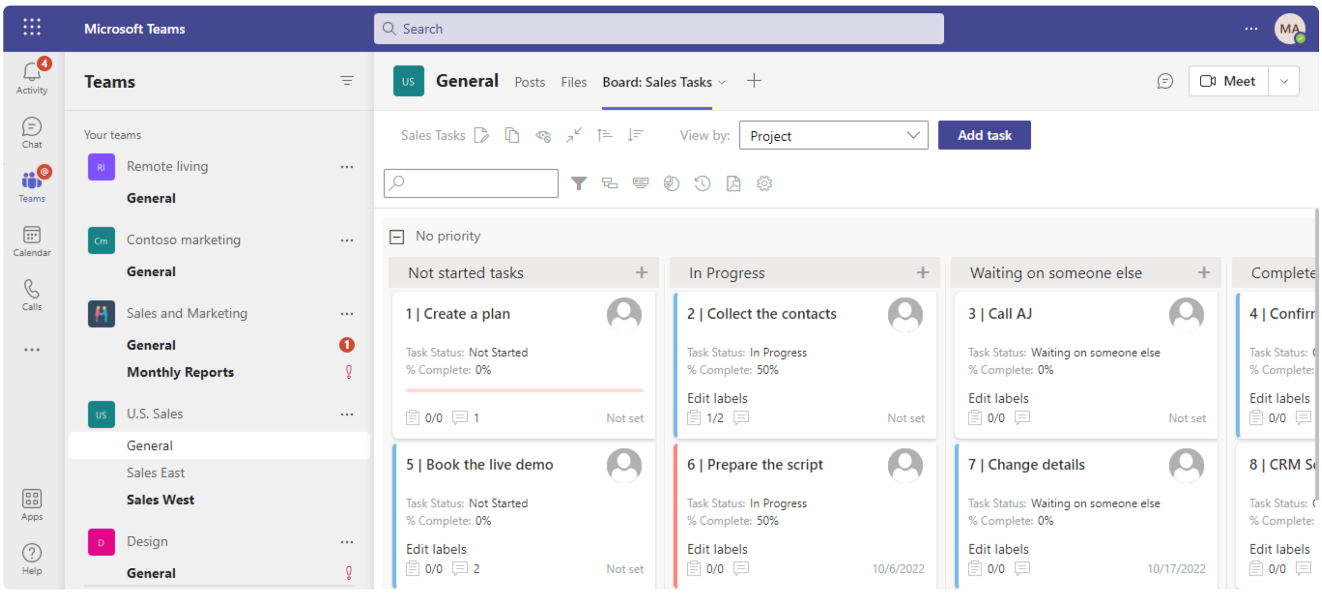
Add Kanban Board

Choose a board you wish to add and save the settings.



Choose the board

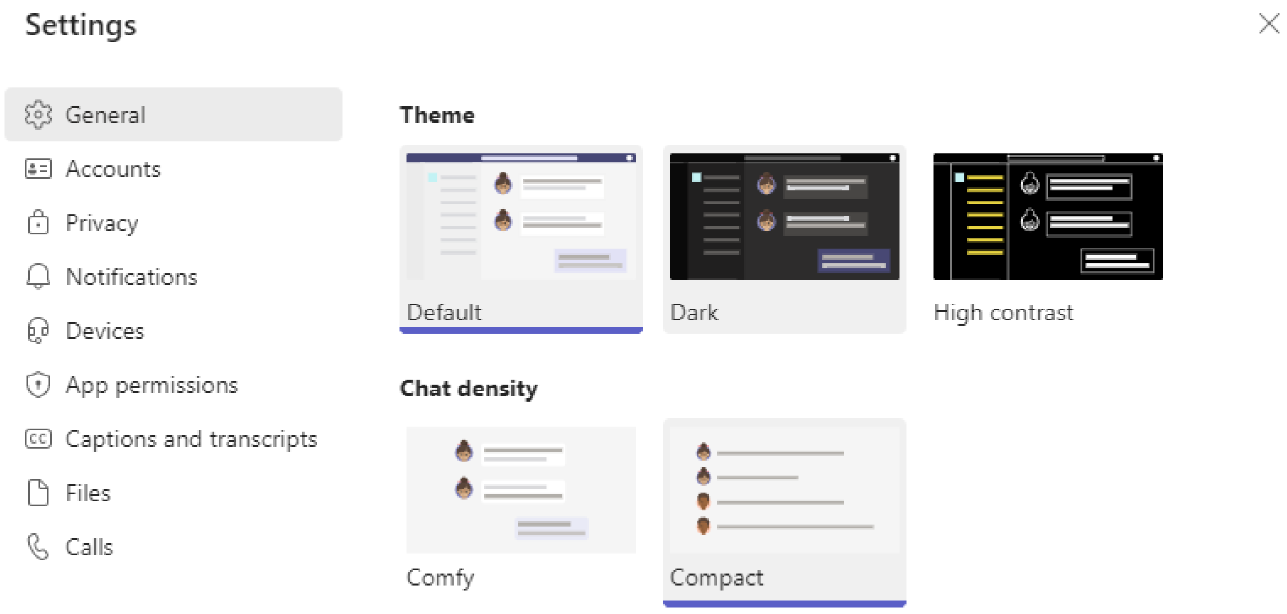
Now you have a full-featured kanban board in a separate tab of the Teams channel.



Kanban in Teams

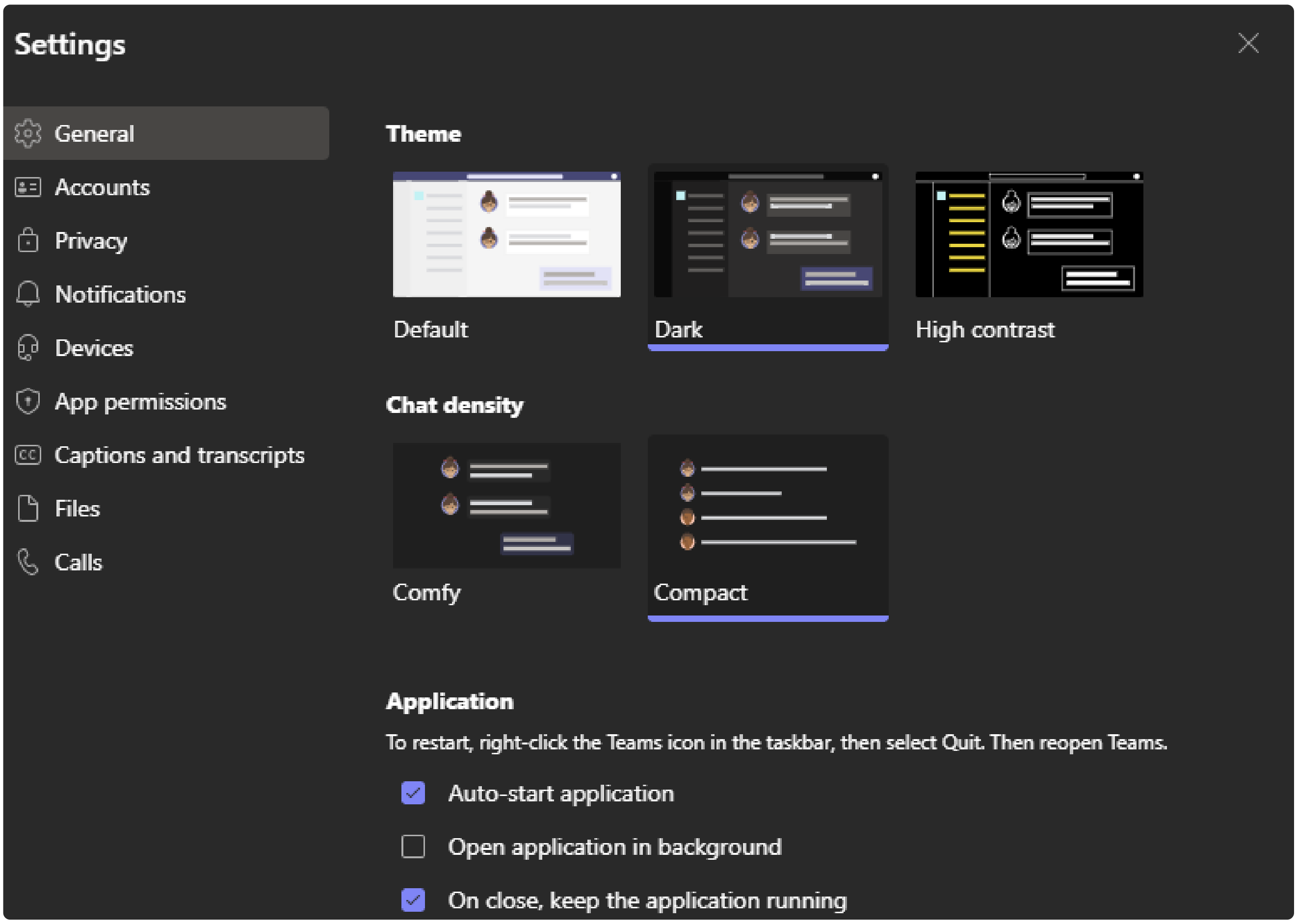
Dark theme

You can apply the dark theme for Kanban Board in Teams. Open the Teams settings (right-click on the Teams icon in the tray) and choose the dark theme.



Turn on the dark thme mode

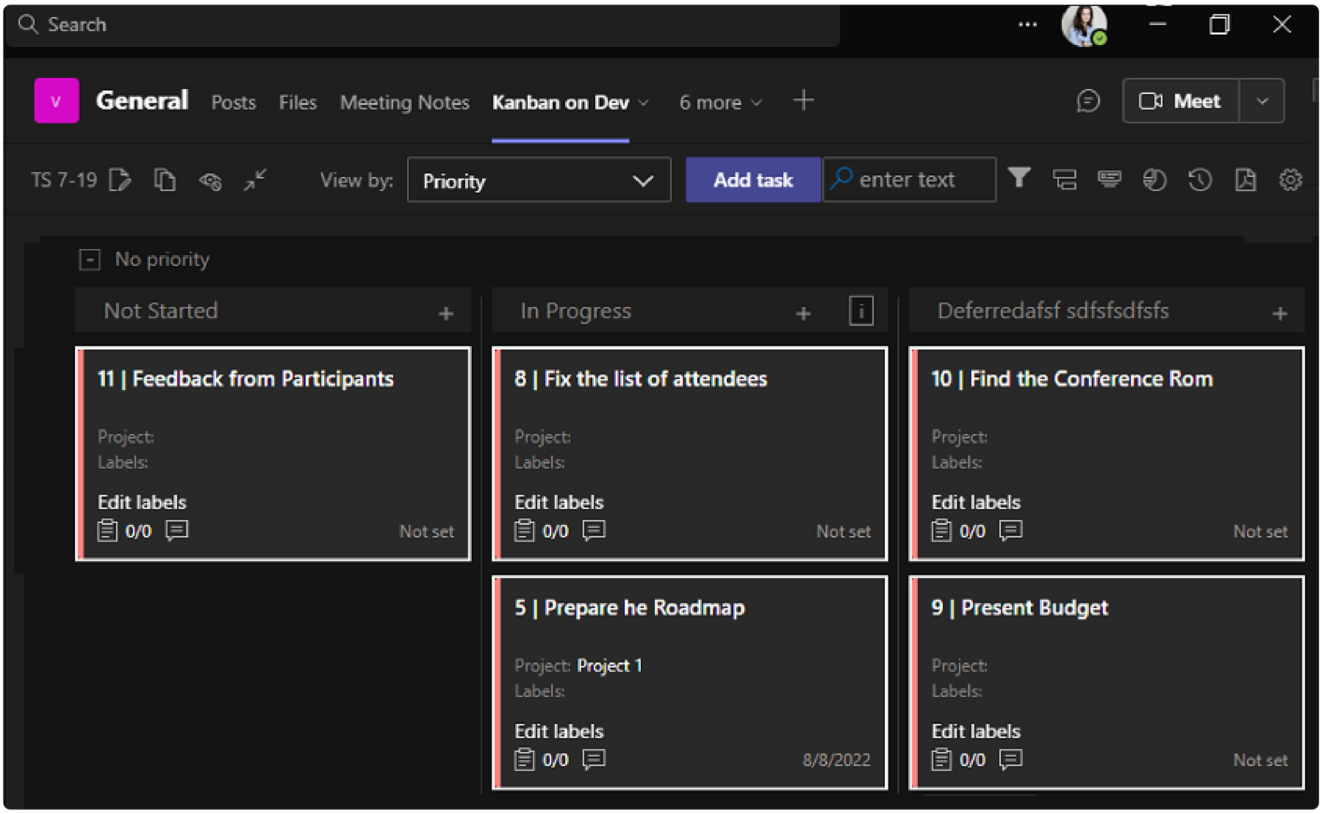
The screen will switch to dark mode.



Dark mode

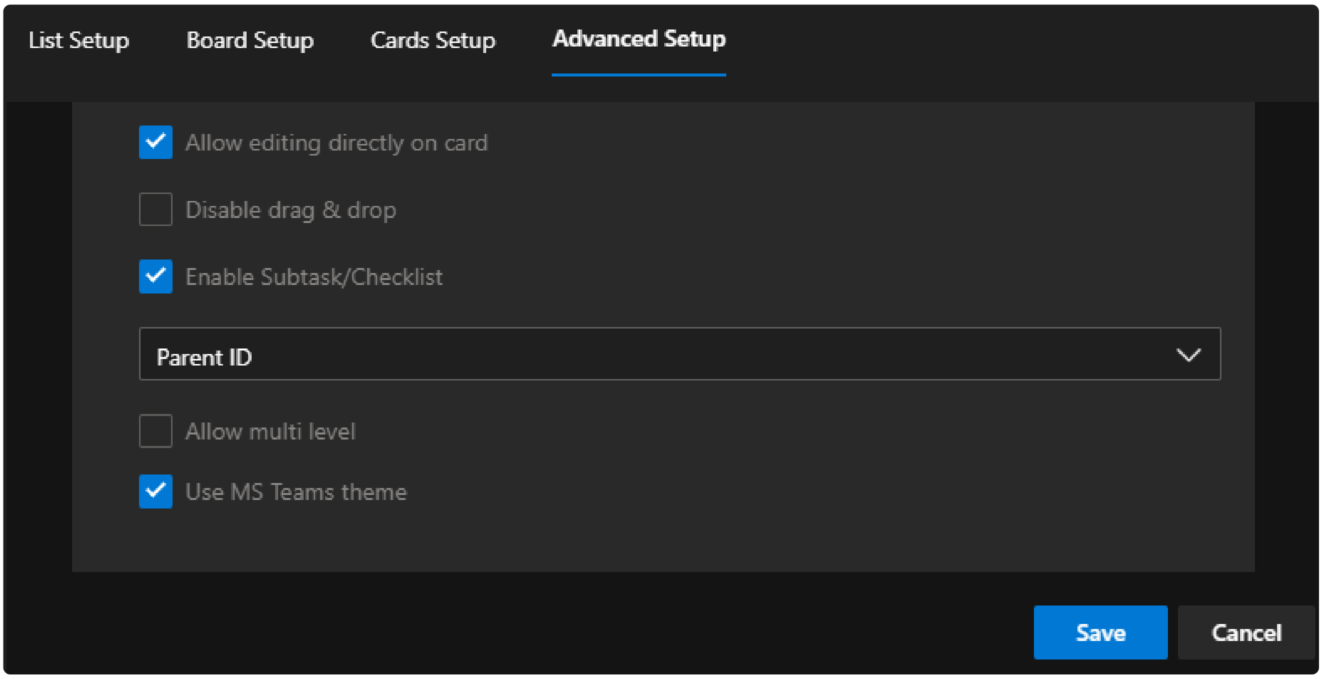
Now open the Teams channel where you have added the Virto Kanban Board as a separate tab. Or see how to do this in the "**How to Install Virto Kanban Board for Microsoft Teams**" blog post.

The kanban board will also be displayed in dark mode.



Kanban dark theme

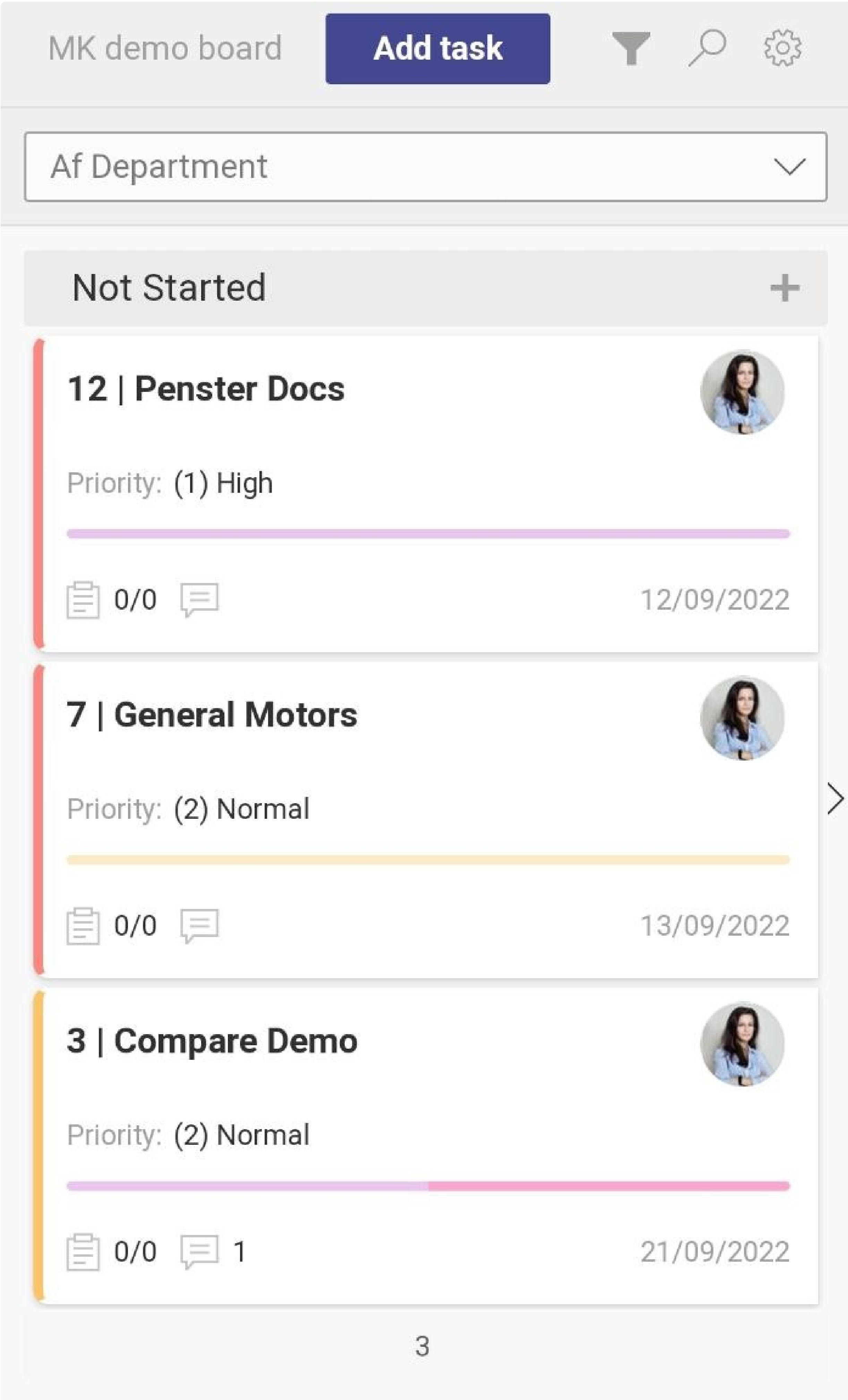
> *If the board is somehow not synchronized to the Teams theme, open the board settings ("**Advanced Setup**") and ensure you have the checkbox "**Use Microsoft Teams theme**" ticked.*



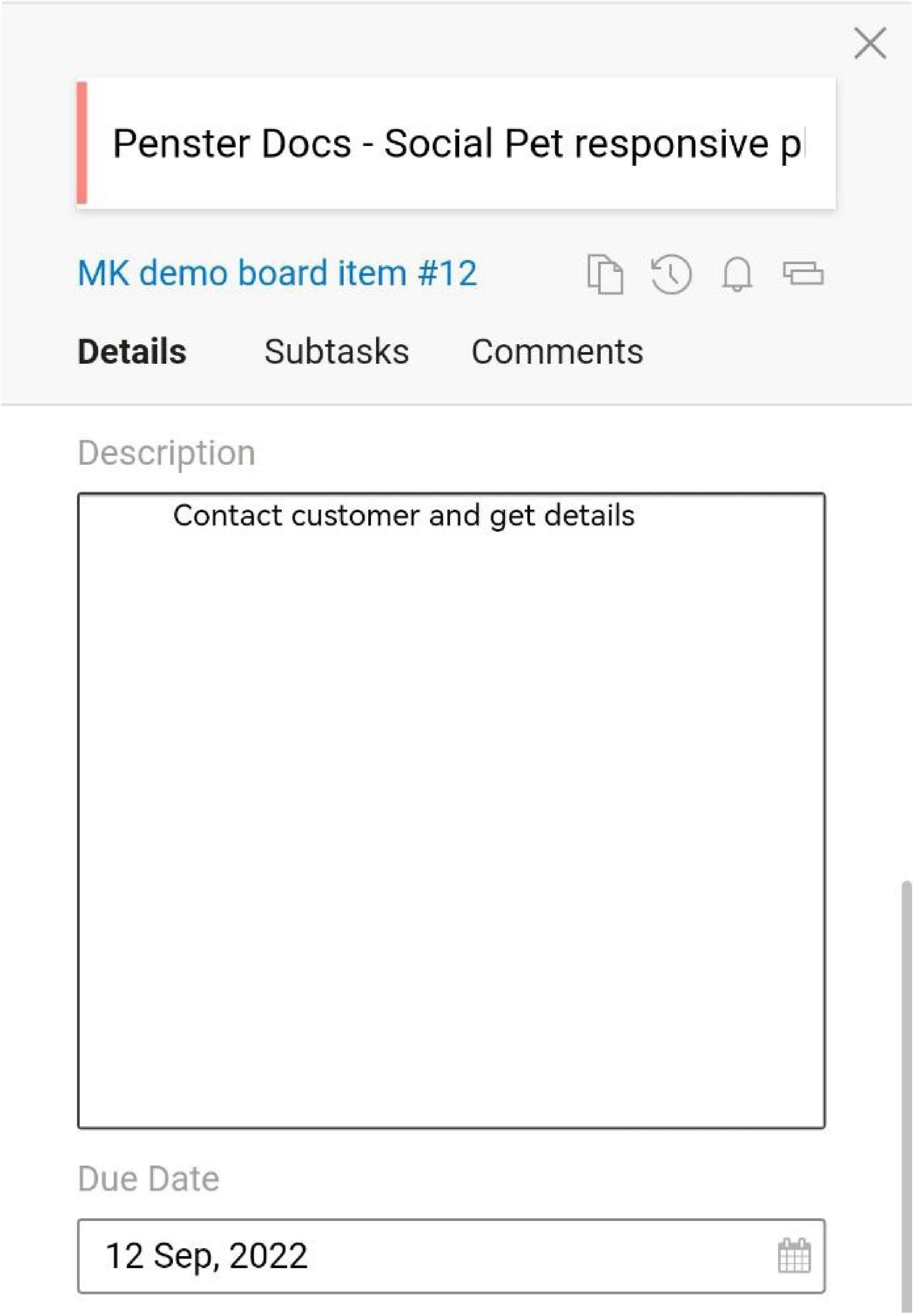
Use MS Teams theme

Kanban Board on mobile devices

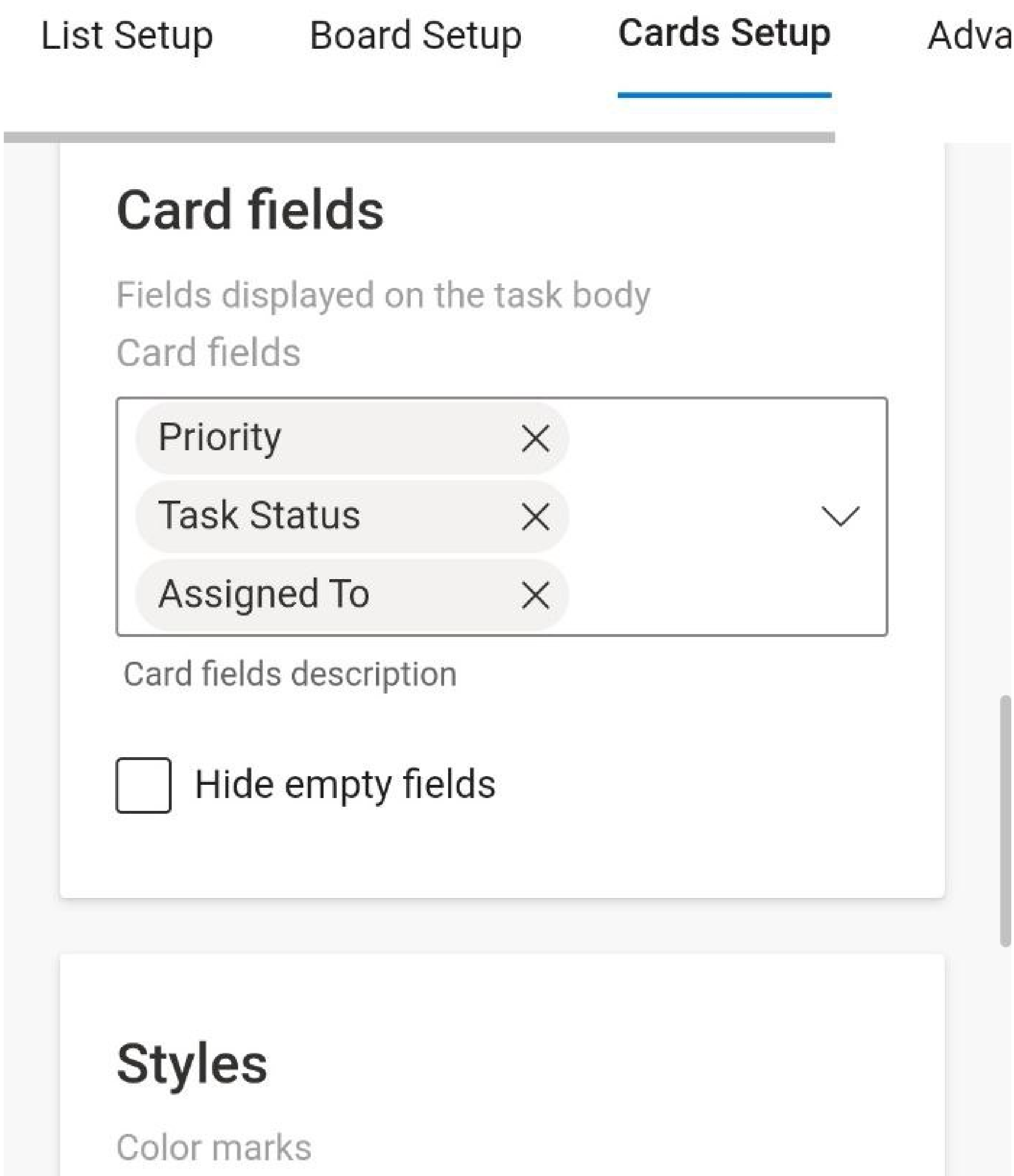
Kanban Board Pro is compatible with mobile devices; keeping the same pack of features, the board adjusts to the parameters of different devices.

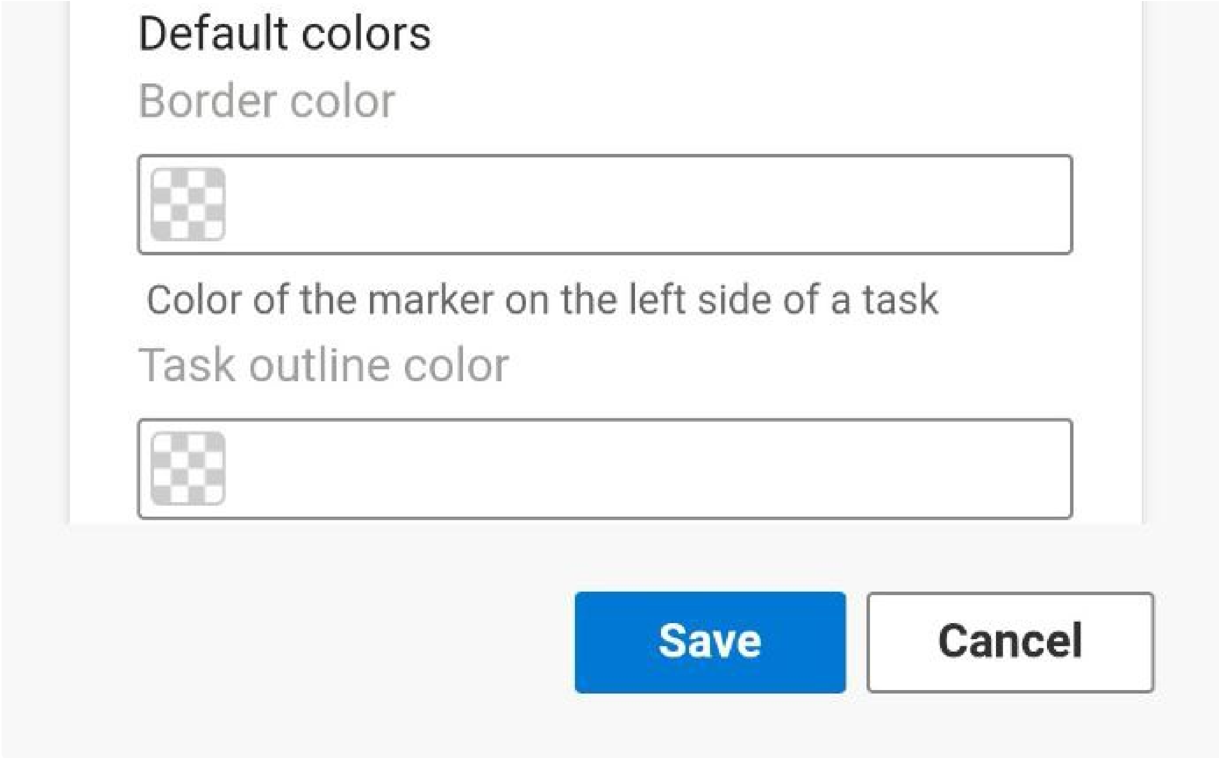

MK demo board
Add task
Af Department
Not Started
12 | Penster Docs
Priority: (1) High
0/0
12/09/2022
7 | General Motors
Priority: (2) Normal
0/0
13/09/2022
3 | Compare Demo
Priority: (2) Normal
0/0
1
21/09/2022
3

Kanban mobile



Kanban mobile





Kanban mobile

Licensing

Privacy Policy

Last Updated: June 9, 2023

This Privacy Policy explains how Virto Kanban Board ("We," "Us," or "Our") collects, uses, shares, and protects user information. It also explains your rights and choices about such use and sharing and your ability to control your privacy settings.

Please note that this Privacy Policy only applies to the Virto Kanban Board application (the "Service") and not to any other services, websites, or applications, even if they are accessible through our Service.

1. Information We Collect

When you use the Service, we collect the following types of data:

- Personal Identifier such as your email address. We store neither personal information nor a password. The stored data can be deleted upon request.
- Usage Data such as device information, IP address, and usage statistics.
- Support Information when you interact with our support team.

We do not collect sensitive personal data unless you provide it voluntarily.

> ⓘ If you have **data storage and security** concerns, please refer to our frequently asked questions section.

2. How We Use Your Information

We use the information we collect to:

- Provide and personalize the Service.
- Improve and optimize the Service.
- Communicate with you about the Service, including support services.
- Monitor and analyze trends, usage, and activities connected with the Service.

3. Information Sharing

We do not sell, trade, or otherwise transfer to outside parties your Identifiers. We may share your information:

- With service providers who perform services on our behalf.
- As required by law or requested by governmental or law enforcement authorities.
- If necessary, to protect the safety, rights, or property of Virto Kanban Board, its users, or the public.

4. Information storage

In the subscription administration interface, you have the option to select where your data will be stored. There are currently two default locations to choose from: the Western USA and Western Europe.

If you do not choose a location, your data will be stored in the default location of the Western US. It is important to note that we do not track your location, so it is your responsibility to ensure that your data storage location is in compliance with relevant legislation.

5. Security of Your Information

We use appropriate physical, technical, and administrative security measures to protect your data. Despite these measures, we cannot guarantee the security of your data transmitted to our Service.

6. Your Choices and Rights

You may review, update, or delete the Personal Identifiers by logging into your account and visiting your account settings page. You may also contact us if you wish to deactivate your account or for any privacy-related questions.

7. Children's Privacy

Our Service is not directed to individuals under 16. We do not knowingly collect Personal Identifiers from children under 16. If we become aware that a child under 16 has provided us with Personal Identifiers, we will take steps to delete such information.

8. Changes to This Policy

We may update our Privacy Policy from time to time. We will notify you of any changes by posting the new Privacy Policy on this page.

9. Contact Us

If you have any questions about this Privacy Policy, please get in touch with us at **support@virtosoftware.com.**

Terms of Use (End User License Agreement)

END USER LICENSE AGREEMENT FOR VIRTO KANBAN BOARD PRO

Please review the following license agreement before installing or using the Kanban Board Pro app software product and/or its related materials.

Definitions: This UAB VirtoSoftware End User Software License Agreement (“EULA”) is a legal agreement between you (either as an individual user, corporation, or single entity) and UAB VirtoSoftware for the Virto Kanban Board product, which includes software and may include associated media, printed materials, and “online” or electronic documentation (“SOFTWARE PRODUCT” or “SOFTWARE”). By exercising your rights to install the SOFTWARE PRODUCT, you agree to be bound by the terms of this EULA, including the limitations and warranty disclaimers.

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Licensing

> Use full-featured Kanban Board Pro by Virto during 30-day trial period. When the trial period is over, you may still use Kanban Board Pro for free for up to three users.

Kanban Board Pro licenses

Kanban Board Pro by Virto is licensed **depending on the number of users with edit and read-only permissions**.

For example, you plan to let ten users work with Kanban Board Pro. *Two* of them will have edit rights and *eight* of them will have read-only rights. You need to purchase *ten* licenses for all Kanban Board Pro users even though some of them will have read-only rights.

> The minimum purchase for Kanban Board Pro by Virto is 20 users.

Auto-assign feature

Kanban Board Pro has a built-in auto-assign system. When a user without a license is trying to access the app, they can get the license automatically if there are some purchased unassigned licenses. The feature is not activated by default, you can enable it in the "License center" of Kanban Board app settings.

Please find the detailed description in "**License management**." The information about all Kanban Board Pro editions is **on the product page**.

If Kanban Board Pro is a part of Virto One Cloud edition

You can use Kanban Board Pro as a part of **Virto One Cloud**. Virto One Cloud has three editions: standard, professional, and ultimate. Kanban Board Pro is included in all of them.

> The minimum purchase for Virto One Cloud is 50 users.

Data Storage & Security

At Virtosoftware, we understand that the security of your data is of utmost importance, which is why we use state-of-the-art security measures to keep your information safe. Our data storage and security framework fully corresponds with Microsoft's data protection standards.

For more information, please check the Security FAQ.

Contact information

Contact us

Book a **free 15-minute meeting** with our technical team if you have any questions regarding setup, features, or pricing.

Contact us with a general or specific inquiry

Product support and technical questions:

- submit a **support** ticket
- write us: **support@virtosoftware.com**
- call us: +1 (877) 892-7775 (from 9 am-5 pm M-F PST)

Reseller & Partner Programs

Check out our **partner programs** or write **partner@virtosoftware.com**.

Press & Media Contact

pr@virtosoftware.com

Meet us at our offices

U.S. Office

20945 Devonshire St. Suite 102

Los Angeles, CA 91311

European Office

Penta Technopolis, Ozo g. 12A,

Vilnius, Lithuania 08200

Join our social community

Linkedin: **https://www.linkedin.com/company/1025136**

Facebook: **https://facebook.com/virtosoftware**

Youtube: **https://www.youtube.com/@VirtosoftwareVideo**