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Dear User,

welcome to the Kanban Tool quick guide manual. On the following pages you will find a collection of Kanban Tool's most important functions, that will allow you to start managing your project without any further delay. Enjoy!
1. Creating your first board using a template

First of all you will need to create at least one board to work on. When you log in to your account please select the option Create new board visible on the vertical panel on the right side of your screen.

In this section you are able to name your board, provide a short description and, most importantly, choose one of the pre-defined types of the board that will allow you to start the work as quickly as possible.

There are two kinds of boards – simple and team, each with three sub-types:

1.1. Simple Kanban

- A Basic Kanban Board template:

This is a very simple workflow, suitable for basic personal work and time management. It has three self-descriptive states:

- **To do** to store and organize things you want to work on.
- **In progress** with limit to keep you from doing too many things at the same time.
- **Done** for reference and to track your performance.

![Fig 1: A basic Kanban board template](image)
- A Time driven Kanban Board template

The time driven version of basic workflow. Works best if you plan in a time based manner. The board layout looks as follows:

- **To do**
- **Scheduled** with three categories:
  - **Soon** - things to do in near future
  - **Tomorrow** - limited number of things scheduled for tomorrow
  - **Today** - things to do today with limit of 7 cards to keep you focused and organized
- **In progress** with limit to keep you from doing too many things at the same time.
- **Done** for reference and to track your performance.

![Figure 2: A time driven Kanban board template](image)

- An event driven Kanban Board template

The event driven version of a basic workflow works best when some external event (like approval, or a pre-defined completion of a particular stage etc.) determines which tasks are ready to be worked on next. The board layout looks as follows:

- **To do** with three categories:
  - **Backlog** - things to do some time in future
  - **Waiting** – a limited number of selected tasks waiting for some event to happen (i.e. approval)
1.2. Team Kanban Board

- A Basic Team Board template

Team boards use buffers to signal that tasks are ready to be pulled to the next workflow stage, possibly by other team members. The board layout looks as follows:

- **Backlog** - containing all the things a team can work on
- **In progress** with two columns:
  - **Waiting** - for tasks ready to be pulled when enough capacity is reached
  - **Working** - limited number of tasks currently being worked on
- **Done** for keeping a reference and to monitor team performance.
- **A Team Board template for product development**

This template can act as a base for describing a product development process.

- Requirements gathering
- Requirements analysis
- In development
  - Waiting
  - Working on
- In QA
  - Waiting
  - Working on
- In verification
  - Waiting
  - Working on
- Done for keeping a reference and to monitor team performance.

![Fig 5: A team Kanban board template for product development](image)

- **A Team Board template for sales pipeline management**

This template can act as a base for describing your sales pipeline.

- Leads
- New opportunities
- Initial communication
- Solution development
- Proposal
- Solution evaluation
- Negotiation
- Closed
  - LOST
  - WON

Fig 6: A team Kanban board template for a sales pipeline

- A Team Board template for online marketing

This template can act as a base for running your online marketing processes.

- Alerts
- To do
- Scheduled
  - This Week
  - Today
- In Progress
- Monitoring
- Done

Fig 7: A team Kanban board template for online marketing
- Creating folders:

For better organization, Kanban Tool allows creating folders, in which you can store your boards (very helpful once you get going and end up with a lot of boards). While on the Dashboard, just click Create new folder. To place a board in a folder, go to more option and choose the “move” option to decide where to put your board.

- A word on initial clarity:

As you can see, there are many available options of designing the board to suit the needs of a particular team or project. At first glance it may look confusing, but we do not want you to get confused. For this reason, it is best to start with any of the basic Kanban Boards and suitably develop them on further steps of the project depending on your needs. This way you can avoid confusion among the team members that need to learn the tool as well – keep it simple from the beginning and it will stay simple even when you've created a whole network of projects.

Before you leave the board creation screen, you can tick the option “I want to further customize this board” to be transferred to the board edition screen.
2. Customizing your board

2.1. Editing the board

Board edition screen is the place where you can change the layout of your board, as well as add further columns and swimlanes that will suit your project flow.

The board edition screen is accessible through Settings → Board Editor, located in the horizontal bar on the top of your screen.

![Workflow edition screen](image)

Fig 8: Workflow edition screen

In the board edition screen your board is a little faded and each column has a set of four icons that can be used to introduce changes to this particular column (or swimlane):

- the **pencil icon** allows you to edit the column or swimlane

- the **split fork** icon is used to divide a particular column into two separate ones. There may be a situation when one group of items has to be further divided into two more, like TO DO items into: - TO DO (this week) and - TO DO (next week), etc. You can divide and subdivide the divisions as much as you need

- the **bin** icon is used to delete a particular column or swimlane when you decide it is no longer needed

- the gray **right / left arrow** icons – these icons allow for changing the location of a particular column or swimlane on the board. Click on the arrow icon for the column / swimlane to swap places with the one indicated by the arrow's point.
To add a column or a swimlane just click on the big green icon visible on the right and at the bottom of the board respectively.

2.2. WIP Limits

The Work In Progress limits are designed to reduce multi-tasking and maximize throughput. To add work in progress limits per column go to Settings → Board editor and click the pencil icon to edit the limit. Fill the work in progress limit in WIP limit field and save.

![Fig 9: Adding a WIP limit to a column](image)

To add a Kanban policy, while on the board, please go to Settings → Board editor. Click on edit (pencil icon) next to the column (or swimlane) name where you want to add the policy.

Then fill the Lane (or Swimlane) Policy / Description field. The policy will be available for every Kanban board user when hovering over the blue info icon on the board.
Fig 10: An example of a lane policy
3. Adding people to your account

3.1. Sharing the account in full capacity

Start collaborating by adding new users to your account. Please click the People tab, visible in the top left the menu.

In the screen that follows, you are able to set an entire sub-account for any person you need to take part in using your Kanban board.

![Add new person](image)

*Fig 11: Adding other team members to the account*

There, you can also assign privileges that determine how much change the particular person can introduce onto the boards:

- If you want this person to view all boards and folders, select the **Account owner** privileges. These privileges allow to see and do everything with and within your account.

- If you’d like for a user to be able to see, manage and create new items within the account, assign them **Account administrator** privileges. They will not be able to edit any account settings.

- When you want a user to only access the boards that were shared with them and create and manage new ones, give them **Project Manager** privileges. Project Managers will be able to invite new people, but will not be able to edit the People section to edit users' options.
3.2. Sharing selected boards and folders only

However, if you only want a user to have access to one selected board or a folder, after inviting this person, please go to the **share** option and select this person to give access. When you fill the pop-up form, the person will receive an email with their user name, password and URL to access your account.

![Sharing a selected board with other team members](Fig 12)

Then, click **Add new person** and fill the form. Choose the **full access** option to allow invited person to **create**, **modify**, **move** and **delete tasks**. This person will have access to this board or folder only.

In the **custom access** option you can specify what exactly a particular person is allowed to do on the board. A **read only** access will only allow to view the board, no modifications of any kind allowed.

3.3. Adding multiple users to the account

If you have a .csv file with details of people you would like to add to your account, you can import them at once instead of adding each person individually. Please go to the **People → Invite a Whole Team** option.
**Fig 13: Adding an entire team to the account**
4. Using your Kanban board

4.1. Creating Kanban cards

With your board edited to suit the needs of your team or project, you can now begin adding tasks. To add a task to a particular column either just double click on the empty space within the column or click the **add task** link.

A card creation screen will appear. Here you are able to:

- **name** the task (this field is required to fill)

- create a **checklist** of items that are part of this task (each of them can be assigned to a specific user)

- write a task **description**, or simply copy & paste any external information about it

- add **card attachments** that make the task easier to complete / understand – at this point, you can only attach files from your computer, unless you have previously enabled the Google Drive / Box integration, or had you switched on the fabulous Web Attachment Power-Up (read more about this in Section 20.9, page 69).

The file attachments (uploads from a computer) are not a feature supported in Kanban Tool’s Free plan. Free plan users can, however utilize the Google Drive / Box and other file hosting service integrations to attach files to cards.

- change the **type of the card** – types are usually connected to colors and will be discussed in sections that follow

- set the **priority** of the task

- add **tags**, to help in managing and searching tasks via the search engine visible in the top right corner of your board
Add at the top option –

Once you've filled in all the information on your task, you have the option to place this newly created task at the top of the column (bottom right corner of the task card) – this is particularly helpful when adding last-minute or urgent tasks to highly populated columns.

Note: Please note this is a standard layout of a card. Adding further functions (fields) to the cards will be described in the next sections.

4.2. Editing Kanban Cards

When you open your new card you will notice some additional options available:
Comments and Card History - here any user with access to the board may leave his notes and comments concerning this particular task. Each comment already comes with the name of the user that wrote it, as well as a date, so it is not necessary to sign the commentary.

Comments will be intertwined with card history – all in chronological order, from the card's creation to the latest changes and comments. All changes are accompanied by their date, time and name of the person who made them.

Comments can be viewed after you press the red “chat” icon in the bottom right corner, and are entered with the bottom text window. You can use attachments and links to make your comments more helpful.

Comment notifications can also be sent to a specified person via email. The comment exchange can be led either by replying in Kanban Tool or by replying to the notification email – whichever works best.

At the bottom of the card, you will also notice the time passed since the card's last edition. If you're using Kanban Tool's Time Tracking – once the team had been
working on a card, and timing this work – under the task’s name there will also be information on the time already worked on it.

By clicking the time logged, a list of all users’ time worked on this task will be displayed.

If you’re not using Time Tracking, the only additional information under the task’s name will be the name of the column, in which that task is currently placed.

Fig 16: Information on current card location on the board
5. Moving around the Kanban board

Kanban boards are all about simplicity. The aim of using a Kanban board is to see the card progress through various stages of the project (left to right) until it reaches the end (i.e. completion) at the far right end of the board.

To move a card around the board just use the standard Drag & Drop method. You can also use a card drop-down menu. Just right-click on the card and select Move. This action will progress the card to the next column to the right.

If you have more tasks that need to be moved from one column to another, right-click in any empty space within a column and select Move all.
### Fig 18: Moving all cards from a column

<table>
<thead>
<tr>
<th>To do</th>
<th>In Progress 1 / 2</th>
<th>Review</th>
<th>Rework</th>
</tr>
</thead>
<tbody>
<tr>
<td>today</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **To do:**
  - task 34 C
  - Contact Manager
  - use case 682 res

- **In Progress 1 / 2:**
  - task 34 U
  - a task

- **Review:**
  - give out the promo codes
  - start the server for mechanics
  - get all archived documents for the tax office
  - give away the marketing info to DC

- **Rework:**
  - prepare the in voice 223
  - check order 89
  - get the documents for the tax office
  - prepare the invoice 487

Move all:
- Sort by
- Delete all
6. Collapsing columns and swimlanes

Are you working with a very large board? You can always collapse or expand column by clicking on it's label (when expanded) or at the + sign (when collapsed). For your convenience, you can still move cards to collapsed columns, just drag a card over and hold above one, until it expands.

Fig 19: Full view of a board

Fig 20: A collapsed view of a board
7. Customizing the card template

It’s very easy to customize Kanban cards layout to suit your needs. You can edit your Kanban card template in Settings → Card template. Here, you are able to add more options to your cards:

- **External ID** -

You can add an external ID to your cards. It’s possible to make it editable, visible on the front of cards, set sequential numbers (this will make the number unique across all your boards) and choose an option to auto generate them for new cards. Editable external ID is useful for fast searching and keeping cards in groups.

- **External link** -

Allows you to attach external links to your cards - very useful when information vital for completion of the task is found on a website. Once an External Link had been placed in a card, it will be possible to open with one click – both from an open and closed card (chain-link icon).

- **Estimated time** -

With use of the Estimated time fields you can get a visual clue on how much time is spent on tasks with regards to your own time estimates about it.

You can add your estimation of how long you think the task will or should take. The Estimated time field is set to work in hours. For instance, you can write: “6” for 6 hours or ",,5" for half an hour or ":25" for 25 minutes.

When work is started on a previously estimated task, there will be a pale green progress bar displayed at the bottom of the card, informing of the running time being within the estimate.

If you work on this task for longer than estimated, a new progress bar will be displayed - pale red, showing how far over the estimate you’ve gone.
To find out more about this feature, please visit this site.

- **Task difficulty** -

Allows you to rank the difficulty of a task, indicating how much effort will be required to complete it. The scale (points) are predefined, but you can edit them and input values used by your team for this purpose.

- **Custom fields** -

This is the part allowing you to create up to 10 custom fields, that will appear on each of the board’s cards. They can contain either free text fields, numbers, drop-down menus with options, an external link or date pickers. You can also set how much space a particular custom field will take on the card edition screen (width in %).

- **Assignment** -

Once this field had been activated, you will be able to assign each of the tasks to different users of the board. Their initials will then be displayed at the fronts of the cards. Users will also be notified of a task assignment via email, and will be able to filter the boards to see the work items that were assigned to them.

- **Due Date** -

Enabling this field will allow you to add a due date to each card. This date will be visible within the card and on top of a closed card (when hovering over the calendar icon associated with the due date field).

Once the due date is less than 10 days away, there will be a number of days left visible next to the calendar, showing you when the due date is approaching. Once exceeded, the number will be displayed in a visible red color.
Here you can choose which fields are visible in the card view and define up to 10 custom ones.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>External ID</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
</tr>
<tr>
<td>External link</td>
<td></td>
</tr>
<tr>
<td>Card Type</td>
<td></td>
</tr>
<tr>
<td>Priority</td>
<td></td>
</tr>
<tr>
<td>Estimated time</td>
<td></td>
</tr>
<tr>
<td>Task Difficulty</td>
<td></td>
</tr>
<tr>
<td>Allowed values</td>
<td></td>
</tr>
<tr>
<td>- unknown, 0.1 - small and relatively easy to get done, 0.3, 0.5, 1.0 - the same as most of</td>
<td></td>
</tr>
<tr>
<td>Default task difficulty</td>
<td>1.0</td>
</tr>
<tr>
<td>Show difficulty on the front of cards</td>
<td></td>
</tr>
<tr>
<td>Assignment</td>
<td></td>
</tr>
<tr>
<td>Due date</td>
<td></td>
</tr>
<tr>
<td>Tags</td>
<td></td>
</tr>
<tr>
<td>Custom field 1</td>
<td></td>
</tr>
<tr>
<td>Custom field 2</td>
<td></td>
</tr>
<tr>
<td>Custom field 3</td>
<td></td>
</tr>
<tr>
<td>Custom field 4</td>
<td></td>
</tr>
<tr>
<td>Custom field 5</td>
<td></td>
</tr>
<tr>
<td>Custom field 6</td>
<td></td>
</tr>
<tr>
<td>Custom field 7</td>
<td></td>
</tr>
<tr>
<td>Custom field 8</td>
<td></td>
</tr>
<tr>
<td>Custom field 9</td>
<td></td>
</tr>
<tr>
<td>Custom field 10</td>
<td></td>
</tr>
</tbody>
</table>

Fig 21: Setting a custom card template
8. Defining Card Types

In the **Settings → Card Types** menu you are able to assign colors to different kinds of cards. You can assign colors to particular users, or according to the urgency of tasks, or simply by the nature of the task at hand (most recommended).

It's not advised to change the meaning of the colors too often as it may cause confusion, and the point of Kanban Tool is making work easier, not harder.

Fig 22: Defining own card types
9. Notifications

There are 3 instances when a user gets notifications by email:

- when this user is assigned to a task,
- when this user is assigned to a checklist item of a task,
- when someone adds a comment to a task and selects this user to be notified about it.

If you want to be informed about the status changes of all tasks on a board, you need to subscribe to RSS feeds.

You can easily generate a link to RSS. While on the Kanban board, please go to tools → subscribe to RSS.

The correct URL for RSS feeds is generated for each user individually for security reasons to protect access to your cards, boards and projects via RSS. Your URL should include surl= + a number.
10. Importing tasks form Excel or CSV

Kanban Tool allows to import Kanban cards to your board. To do it right, please follow the steps below:

- Prepare your Excel or .csv file. Fill it with information useful to you (you can fill as little as the first column of the file alone, if that’s all you need). When creating the file please remember to use only card types and user initials that are set for your board, otherwise the system will not recognize them.

You will need to change the priority from high, low, normal to numerical values. Priority 0 means normal priority, 1 is high and -1 is low. Also, you will have to remove the heading from the .csv file before importing, so that it doesn’t get imported too (the file has to contain only the information that you want to import).

- To make sure that your file will be recognized by Kanban Tool it needs to be encoded in a UTF-8 format – instructions on how to ensure it are provided here. Alternatively, you can copy the information from your .csv file and paste it as text in the text field provided in section 4 of the import (discussed below)

- Once your import file is ready, you need to set Kanban Tool import options

- In board view, go to tools → Import tasks
- Section 1. - choose into what column / swimlane you’d like the tasks to be imported

- Section 2. - choose a separator for the information (a “comma” is the default sign for .csv files)

- Section 3. - select which columns of your .csv file represent what Task Card information (written in the same order that they appear in the file). If you only wrote data in one column of your .csv, select just one field, if you wrote more – make choices for the same number of fields that there are data columns in the .csv;

- Section 4. - here you can either type in your tasks (One task per line, separated by a separator of your choice [in section 2], data between separations will go in different Row Formats).

- Section 5. - you can validate if the way you’ve given information is correct and the import is possible, or not, and if not – you’ll be told what the problem is. After this, you’re ready to hit Import Tasks Now to have your new tasks on the board.
1. **Import tasks into:**
   Select the column and swimlane to which tasks should be imported into.

2. **Separator:**
   Select how columns in the source file are separated.

3. **Row Format:**
   Select how columns in the source file map into task attributes.
   - Name
   - Description
   - Priority
   - Card Type
   - Due Date
   - ignore
   - External ID
   - External Link
   - Size Estimate
   - Assigned User
   - Tags

4. **Import Task / CSV File:**
   One task per line, each line in valid row format. Use quotes when needed.

   - code the 98876,766, "As a customer, I want to have access to the changelog with regards to all the people using my tools.", www.kanbantool.com,0,0,1,pink,S,2014-11-09 "goog, onoo"
   - debug the 62,4453, "As a customer, I want to have access to the changelog with regards to all the people using my tools.", www.kanbantool.com,1,0,2,violet,A M,2014-11-10, "goog, onoo"
   - prepare side views, 5756856, "As a customer, I want to have access to the changelog with regards to all the people using my tools.", www.kanbantool.com,1,0,3,lemon,S,2014-11-11, "goog, onoo"
   - debug the exports, 53540, "As a developer, I want to have access to the changelog with regards to all the people using my tools.", www.kanbantool.com,1,0,2,violet,A M,2014-11-10, "goog, onoo"

   To convert the CSV file into UTF-8 encoding you can follow instructions here. Alternatively you can try to copy-paste the file content to the text area - it should also work.

   - or upload a file -

   ![Browse...](Import Tasks now]
   - No file selected.

---

**Fig 25:** Doing a mass task import to Kanban Tool
11. Exporting tasks to Excel or CSV

You can export all tasks from your board to an Excel or a .csv file. While on the board, please go to tools → Export to excel or Export to CSV option. That's all.

![Fig 26: Making an Excel export of tasks](image-url)
12. Kanban board archive

Kanban Tool allows you to archive completed tasks so they don’t take up space on the board, but still lets you always be able to go back to them. To archive a task, please right-click on it and use the drop-down menu to archive it.

By default this option is available only in the last column of your Kanban board, but you can edit the options of your columns (Settings → Board Editor → pencil icon under the name of a particular column) to allow tasks to be archived in any of the columns.

To archive all tasks in a column just right-click anywhere in that column and select the Archive all option.

![Fig 27: Placing all of a column’s tasks in archive]
Should you want to put a task from the archive back on the board – just go to the + x archived tasks tab at the top of an archive-enabled column, and then right-click on the item that you want to un-archive. You will see an option to Put back on the board. It can also be done for multiple cards at once, after a number of cards was selected with the CTRL button pressed.
13. Kanban Tool Analytics

Kanban Tool provides advanced Kanban analytics and metrics, including: a Cumulative Flow diagram, Lead & Cycle Time diagram, Breakdown Chart and a Time Report.

The Breakdown chart

It allows you to generate various reports about the current status of your board. Select the information that interests you in the drop-downs at the top and hit the green Go button to see the results in form of a pie chart.

![Breakdown Chart](image)

*Fig 29: Kanban Tool Breakdown Chart*

Lead and Cycle Time diagram

It shows the average time it takes tasks to get from a specified start point to a specified end state. It is a powerful metric which can be used to track the delay between the initiation and execution of a process, which is a holistic way to measure team performance. In short, it shows the difference between the work time and process time for tasks.
Cumulative Flow diagram

The (CFD) shows a detailed picture of your entire process and enables you to track items by state. The horizontal x-axis in the CFD stands for time, and the vertical y-axis indicates the number of tasks. Each colored area of the chart represents the amount of work for each stage of your process at a given time. CFD can be used to identify bottlenecks and team velocity.
Fig 31: Kanban Tool Cumulative Flow Diagram
14. Time Tracking and Time Report

Kanban Tool's seamless Time Tracking allows you to measure exactly how long different tasks take. It's seamless, because there is no extra clicking necessary for it to start tracking what you're doing. Simply by dragging a task into an “in progress” type of column, the timer switches on and your work is being measured.

14.1. How to get Time Tracking up and running

To be able to benefit from this powerful feature, you need to be on the Enterprise pricing plan of Kanban Tool. Once you are, simply edit the column types in Settings → Board editor. There are three possible column types, and they will trigger different actions:

- Queue / Waiting - here the timer pauses
- In progress - the timer starts
- Done - the timer stops and the task is removed from the list of timers (My Work for today widget).

![Fig 32: Time being recorded on a task](image)
14.2. The Time Report

Wondering what your team is doing? With the insightful Time Report, you always know how much time your team spends on all activities. To get an overview of what your team does, please select the **Summary report**. On the bar graph you will see the total time spent working each day.

Right below this, there is the information on which team member had been working on what task and for how long. There is also a corresponding pie chart showing the ratio between different team members’ time records.

![Fig 33: The Summary view of Time Report](image)

You may also view the detailed information on what tasks were the team members working, after you press the “+” mark on the left side of the team member's name. The pie chart will then show the ratio of the different tasks this person was working
on to one-another.

Fig 34: Single user’s records in Summary view of Time Report

The Detailed report shows a specific list of all timings. It displays a sum of the time spent, the number of tasks and the total number of entries. Every time you start and pause timers, a new entry is created here. Both Account Administrators and regular users can modify and remove entries by clicking on the icons to the right of each row. Regular users can only edit and remove their own entries.
You can also filter all Time Reports by: boards, time interval, users, task types, swimlanes and tags.

Furthermore, you can export your reports to PDF and print them out or simply save them as a .csv file.
15. My Work for today widget

My Work for today widget is what allows you to display your upcoming tasks **across multiple boards** in one place. From there you can sort them in accordance to your preferences.

To be able to use this widget, you need to be on a pricing plan that includes Time Tracking (Enterprise or Unlimited).

The widget is displayed on the right-hand side of your Kanban board (in the side panel's portion to do with Time Tracking).

To add tasks to the My Work list, please right-click a task and select **Add To My Work**. That's all. Also, when someone else assigns a task to you, it will appear on this list – this also goes for when a checklist item (and not just an entire task) is being assigned. To sort tasks with your own preferences, just use drag and drop.

![Fig 37: Adding tasks to My Work for today widget](image)
15.1. How does the Timer work?

The timer on a task starts just when you move the task into an **In Progress type of column**, or - if there's more tasks in there already, and you pick one of those - when you right-click on it and select **start timer**. As you start timing a task, **wide diagonal lines** will start to animate on it. Please note, that these animations will be displayed for all users' timers (so that you know who is currently working on which task).

Once you've completed a task and moved it to the **Done type** of column, the timer will stop automatically and the task will then disappear from My Work widget, and animation will stop. You can also pause work at any time.

My Work widget also allows displaying the subtotal amounts of time spent on each individual task. It is accessible by clicking the time passed record (time value). Doing this opens a list of all subtotals. They are also available to view in Time Report - just make sure to open the Detailed Report.

Please note, that regular users (nor Account Owners or Administrators) may only edit their own time records.

![Fig 38: Time being recorded on a task – animated lines on timed item visible](image)
The name of the task will appear in a **bold** format, when there's been a new comment made in the task and when the task comes back to the list after being postponed. This widget allows displaying tasks from multiple boards - clicking on a particular task in My Work widget will take you to the Kanban board, that the task is from.

Also, if someone assigns a checklist item to you, a task to which this checklist belongs, will be added to My Work widget - and will appear in bold, so you know there's been new activity and that it needs your attention.
16. Adding tasks via email

In order to add tasks to your Kanban board via email, you need to generate an email address that will be directly assigned to your Kanban board. To do this, please click on the tools menu in the top right corner of the board view and choose add tasks from email. You will be moved to a screen with an email address that is assigned to this board.

Please, carefully copy the email address displayed on top of the form (in the address section). Sending emails at this address will add tasks to your board.

The subject of the email will be the name of the task, while the message itself will constitute the description of the task. **Filling in the subject field is necessary** to create a task. Please note, that you can write up to 256 signs in the task name field.

You can also include any type of files in the email, as regular attachments (note the size limit for 1 file being 20 MB). These will get added to the task in Kanban Tool as attachments. This makes for a great tool for better email management - you can just forward all emails to your board and work them into your workflow.

Advanced task adding via email - you can further determine the features of the task by adding tags to the subject of the email. Names of the tags [always written
within square brackets] correspond with the names on your Kanban board and determine the location of the new task added to the board.

[Tags] should be added before the name of the task, without spaces between them.

The attributes currently supported are:
- column name,
- swimlane name,
- card type,
- assigned user initials,
- priority (high / low).

Any other attribute set in the email subject within square brackets will go to the Tags field. The graphics below show: a properly prepared task-creating email (the top one) and the same task, once received by the board (the bottom one).

![Example of creating tasks by email]

**Example 1** (a simple task on a basic Kanban board):

[Yellow][To do]Task 1

An email subject written like this will assign a yellow card to the „To do” column of the Kanban board with a name „Task 1”.

**Example 2** (more complex task on a more advanced Kanban board):

[Red][Waiting][Marketing][BT]Perform A/B tests
An email subject written like this will assign a red card to the „Waiting“ column of the „Marketing“ swimlane with the name of Bill Thompson and a task name „Perform A/B tests“.
17. Kanban Tool integration

Kanban Tool offers many useful integration features. We also provide a powerful API to integrate Kanban Tool with your systems. You can find more information in our well-documented Kanban Tool API page.

17.1. “Add task button” Chrome extension for Kanban Tool

While on the Dashboard go to My profile → API access. Generate your API token and copy it. Then please go to the Chrome Web Store and add the Kanban Tool Add task button extension to Chrome. It will appear in the top right corner menu of your browser, along any other extensions. The best way to enable it, is to right-click it, and go to Options. Here is where you can add your domain name (your Kanban Tool account name) and where you should paste the API Token.

Fig 41: Kanban Tool Add Task button for Chrome
Then you will be taken to Options, where you can decide to which of your Kanban boards you want to be adding tasks via this button. Once you’ve set everything, you can quickly **add new tasks** by clicking the Kanban Tool button in the browser’s top right corner. You can easily change the board that you’re adding tasks to by entering the Options menu in the same way as described above.

**Fig 42: API token for Add Task button**

**Fig 43: Setting the column for adding tasks via the Add Task button**
17.2. "Kanbanira" Chrome extension for Kanban Tool

Kanbanira connects tasks in Kanban Tool with issues in Atlassian JIRA®. It's a simple, but powerful integration allowing you to gain most benefit from both tools. All you need to start, is visit the Kanbanira page in Google Web Store and watch a video on how to integrate Kanban Tool with Atlassian JIRA® using Kanbanira.

17.3. Zapier and We-Wired Web integration

This is the easiest way to sync Kanban Tool with other web services, that you and your team already use on a daily basis. With Zapier you can hook Kanban Tool with any of the over 200 supported applications.

We-Wired Web is an online service, that allows you to easily create automated tasks for popular web services. All you need to do is choose the online applications, that you like and link them - select a trigger and an action that you want to combine. You can even use multiple triggers and actions per task, as well as location-based triggers defined on maps.

17.4. Export tasks to Outlook

In order for this integration to work, you'll need to have some tasks with due dates first. To enable the Due Date field on your card: while on board please go to Settings → Card Template and enable the Due date field. Once you've filled in the "due date" on your cards, you will be ready to export tasks to Outlook.

To export task names with tasks due dates to Outlook, while in board view please go to tools → export to calendar and select Outlook / iCal. Note please, that Outlook should be your default calendar in order for the set-up to work correctly.

17.5. Export tasks to Google Calendar

In order for this integration to work, you'll need to have some tasks with due dates first. To enable the Due date field on your card: while on board please go to Settings → Card Template and enable Due date field. Once you've filled in the "due date" on your cards, you will be ready to export tasks to Google Calendar.

To do it, while on the board, please go to tools → export to calendar and Google.
On the Google Calendar tab you will be asked: "Do you want to add this calendar?". Please click "Yes, add this calendar". Now your tasks with due dates should appear in Google Calendar.

17.6. Attach files from Google Drive, Dropbox, OneDrive or Box

Integration with these file hosting services allows you to attach files from them to your task cards or to place direct external links in cards. Please read more about this in the Power-Ups Section of this Manual (page 55).

17.7. Kanban Cast

*Kanban Cast* is Kanban Tool's integration with Chromecast, a Chrome (internet browser) streaming device, that when attached to a tv screen, displays your Kanban board in a view customized to best suit a large screen. Perfect for daily stand-ups or other work related meetings, but most of all – a great parallel to the original Kanban whiteboard idea, and a fantastic information radiator for the whole team.

To enable it, please open your Kanban board view in Chrome, switch it on in the top right corner - right next to the tools section, choose a receiver and see it loading.

17.8. Adding tasks from Microsoft Excel

If you often work in Microsoft Excel spreadsheets, and want to integrate your Kanban board with Excel data - you may wish to simply create tasks on a Kanban board directly from the Excel data cells.

Please download [this guide](#).

Follow the clearly explained steps to add a custom macro to your spreadsheet, and you will be adding tasks to Kanban Tool from Excel in no time!
18. Cloning your boards

Once you've created a board layout that you love, it would be an unnecessary effort to have to create another one from scratch. For that reason we have prepared an option to clone existing boards. You can either clone the layout only, or the whole board with the existing tasks.

To clone a board, you have to go to the dashboard, where all of your existing boards are displayed. Then just click more → clone.

You will be transferred to a board cloning screen, where you can give a name to the new board, provide description and even place it inside a folder (if any have been created). Most importantly, here you can also choose whether to copy it with the existing tasks or without them.

Fig 44: Board cloning
Clone board "Scruban"

New name for board clone:

Short description (optional):

Place inside folder:

- none --

Clone all visible tasks

Clone now or cancel

Fig 45: Board cloning options
19. Speeding up your work – shortcuts, board filters & global search

In the top right section of the headline you can see the shortcuts link. By moving the cursor over it you will display a list of useful keyboard shortcuts that can be utilized to speed up your work while using the Kanban Tool board.

You can also easily filter your tasks by a specific criteria. To view the criteria available, please click the funnel icon next to the filter's text editing window (marked green above).

Alternatively, you can scan all of your boards in search of particular card information or by certain criteria. To use the global search, click the magnifying glass (marked in red above) icon on the right side of the filtering funnel. To find out what search queries are supported please view this guide.

Please note, that the important difference between filtering and searching is in their range: filtering is limited to 1 board, and searching applies to all boards you have access to.
20. Power-Ups

With Kanban Tool's Power-Ups you can customize your boards and fine-tune your experience with the service. We are constantly working on developing new features, that will add to Kanban Tool's usefulness.

To get started, go to Settings → Power-Ups and enable those that you fancy using.

Following is an outline of what Power-Ups you will find there, followed by a detailed description of each of them.

Fig 47: Kanban Tool Power-Ups for more custom options
Fig 48: Kanban Tool Power-Ups
20.1. Calendar widget

This Power-Up is a simple calendar, that will be displayed in the side panel. By default it will be highlighting your tasks’ due dates in it. You can click on highlighted days to see what tasks are due when.

The days that are highlighted in yellow are those that have due dates on tasks assigned to you, while the ones highlighted in bold are due dates on tasks with no assignment, or assigned to other team members.
20.2. Interactive Checklists

It offers a simple way of getting to view and tick-off their task lists without having to open the card itself. To enable it for your board, please go to the board's Settings – Power-Ups and switch the Interactive Checklist Power-Up on.

In there, you will find a setting to have the checklist items expanded in all or just the "Working" types of columns, you will also be able to choose whether all list items should be displayed, only the incomplete ones or just the first incomplete one. Simply adjust the settings to match your requirements & enjoy the easy checklist access.

![Fig 50: The Interactive Checklist Power-Up](image)
20.3. Card aging

With this Power-Up, the cards will begin to fade as they haven't been edited or active for some time (it's up to you what time that is exactly).

![Card aging](image)

*Fig 51: The Card Aging Power-Up*

20.4. Recurring Tasks

This is the perfect way to make your work planning a whole lot easier.

If there are tasks that you're doing every day, week, few days or monthly - rather than having to create them for each of these instances separately, just use the Recurring Tasks Power-Up.

With this Power-Up, an instance of a recurring task will be popping up on the board on a desired day and time.

For more details on configuration, please [visit this page](#).
20.5. Custom Theme

This Power-Up brings the possibility of making significant changes to the way your Kanban Tool board looks. You have a choice of a Default (light) theme and a Dark Theme.

![Custom Theme settings](image)

Fig 52: Custom Theme settings

Also, you can choose a customized background from among the many images we’ve prepared, or upload your own.

Also from here, you will be able to choose your closed card card view font size.
20.6. Team Activity Widget

This is a useful log of activity on a board. Displayed in the side panel, this will inform you about recent happenings on the board. New comments posted, tasks being moved, edited or deleted, and more. Enable it if you want to make sure that you're always up to date with what's going on.

Fig 53: Team Activity Widget
20.7. Add task box

By enabling this Power-up it will be even quicker to add new tasks. Once active, you will see a simple task box in a column, over which you'll hover the mouse cursor. Simply by writing in the task name and hitting **Enter** - a new task is placed on the board.

![Fig 54: The Add Task Box Power-Up](image)
20.8. Task navigator

There are situations, when you want to view or edit a number of tasks one after another. Once you've switched this Power-Up on, whenever you open a task card, useful arrows on each side will appear.

The arrows will speed up the navigation between tasks, and save you having to open and close tasks by hand. Just click an arrow to move to the next task in column.

Fig 55: Task Navigator Power-Up
20.9. Developer Tools

Thanks to this Power-Up you can add custom scripts and style sheets to your board. All of these free scripts are available on: [http://github.com/kanbantool/scripts](http://github.com/kanbantool/scripts).

At the moment we offer following scripts:

- **High Contrast mode script** –
  
  Once you've added it to your chosen Developer Tools, go to the board view and click on **tools → high contrast mode**;

- **Large Font script** –
  
  Use „medium-font.css“ to make the font slightly bigger, and „large-font.css“ to make it extra large. You can join this script with High-contrast to get an even greater experience on large TV displays.

  Font size can also be increased from the Custom Theme Power-up.

- **Card Tilt script** –
  
  It makes the cards look more like real-life sticky notes:
**Delete all script** –

Adds an option to remove all cards from one column. Please use with caution, as deleted cards cannot be restored.

**Fixed card height script** –

It happens sometimes that different size cards get stuck on a particular height of a column, but you can get this sorted with this script.

It will block the auto-scaling feature of cards and makes them appear next to each other without spaces in between them.
Fig 58: Developer Tools script: Fixed Card Height
- **Move to done script** –

This new button will be added to a task card, and once you tick it, the card will be moved to the last column of the board.

- **Task done script** -

A similar effect to Move to done button action can be achieved with the Task done script, but this one adds the option to the context menu (right-click on a task while in board view).
- Change column script -

If you'd like to move a task to a particular column on the board, but this is not necessarily the closest to its current position, you can benefit from the Change column script. It will allow you to send the task to any column within the board.

![Fig 60: Developer Tools script: Change Column](image)

- Cycle Time script -

If you're interested in seeing the amount of time that a task has spent on the board, you can use the **Cycle Time** script, which will make this exact information display on the front of the card.
Fig 61: Developer Tools script: Cycle Time
20.10. Card block

With this Power-Up cards can be marked as blocked from the context menu. Blocked cards cannot be moved, they have distinctive look (stripes) and a message explaining why they have been blocked.

Fig 62: The Card Block Power-Up
20.11. Web attachments

This clever Power-Up will let you link any address on the internet (a task, a board, a website) to a task card. To do this, simply click on the **add attachment** link on your card and choose the „Attach from the web“ option.

*Fig 63: The Web Attachments Power-Up*
20.12. Google Drive, Box, Dropbox, One Drive Power-Ups

Integrate your Kanban board with your favorite file hosting service. This will enable you to store file attachments on either service and easily access them through Kanban Tool.

To use this type of integration, please go to **Settings → Power-Ups**, and enable the ones that you wish to use. Now you will be able to add and link file attachments from any of these services.

You will now be able to add documents to your tasks and access them directly through the stored link. Google Drive will allow you to collaborate on your attached documents in real-time.

![File Hosting Services Integration Power-Up](image)

*Fig 64: File Hosting Services Integration Power-Up*
20.13. Auto assign

Wouldn't it be great if just moving an unassigned card meant that it's being assigned to the user who moved it? This is what this Power-Up does.


This power-up will add pop-up notifications of task updates, that will appear when board changes are made by other users while you're also logged in at the same time. This helps you all to stay on track of the recent changes.

The changes that will be included on these notifications are adding, moving, deleting or archiving a task.

20.15. Kanban Cast

This is a great way to make your Kanban Tool boards into an information radiator and make the team even more informed on the going-ons. This integration has been characterized on page 51 of this User Manual.

20.16. truDigital Signage

If you have a truDigital Signage device, you can prepare a changing information display of applications used by the team along with your Kanban Tool boards. Visit this page to learn more about it.

20.17. Emoji Picker

Want to make your Kanban Tool comments say more with expressive emoji? To enter an emoticon to your Kanban Tool comment, please use the twemoji model, so instead of ":)" for a smile icon please use "::smile:".

You can view a full list of supported twemojis here. Or - you can make this easy for yourself by enabling the Emoji Picker Power-Up in board Settings. This will add an icon picker to your comment editing section.
20.18. Checklist Templates

Checklist Templates Power-Up allow for preparing a number of default lists for your cards. Once created, they can be added to your cards with just one click. To use this feature, please enable it in board Settings - Power-Ups and create your checklists from there.

After the templates have been prepared, you can choose a template for any new or existing card.

Fig 65: Choosing a checklist from Checklist Templates
20.19. Postponed Tasks

It's a great way to clear your boards from items that you can't get to work until a specific event takes place, or simply until you have the time for it. The supported options are to postpone until the evening, next day, next week or a specific time and date. When the set time comes, your task will come right back into the column, that it was set to delay from.

20.20. Task Summary

Task Summary will let you show more information on a closed card. You can choose from among all of your custom fields, as well as from the generic information, such as card type, due date, external link, assigned user, priority, ID etc. - and, additionally, it's possible to show information on the task creator, logged time and lead time (time passed since card creation).

On top of this, you can display the entire task description (or its first paragraph) on a closed card too if you like.

Fig 66: Task Summary enabled – additional information on closed cards
20.21. Card Legend

This add-on will show you the names and colors of card types used on a board, right at the bottom of the board. So, without having the view of your board obstructed, you will be able to quickly find out which color symbolizes what type of task.

Fig 67: Card Legend visible at the bottom of the image
21. One-Click access to Kanban Tool

Kanban Tool offers you a quick and secure access to Kanban Tool with SAML 2.0 based One-Click authentication. This solution helps to centralize the access control and allows your employees to access Kanban Tool and other services without a password.

This integration will allow all your team members to log in to Kanban Tool with just one click. Also creating new accounts is much simpler, just add a new person's profile to the identity provider's service. Similarly, when someone leaves your company, you'll be able to delete their profile with a single modification.

To enable it for your team - you will first need to have an account with one of the identity providers (an example: OneLogin, SecureAuth). Then, from the Kanban Tool's Owner Account go to Account Administration panel, then Single Sign-On and click right next to the enable SAML 2.0 Single Sign On. Here you will need to fill in the information provided by the identity provider's service. From here your team is all set.