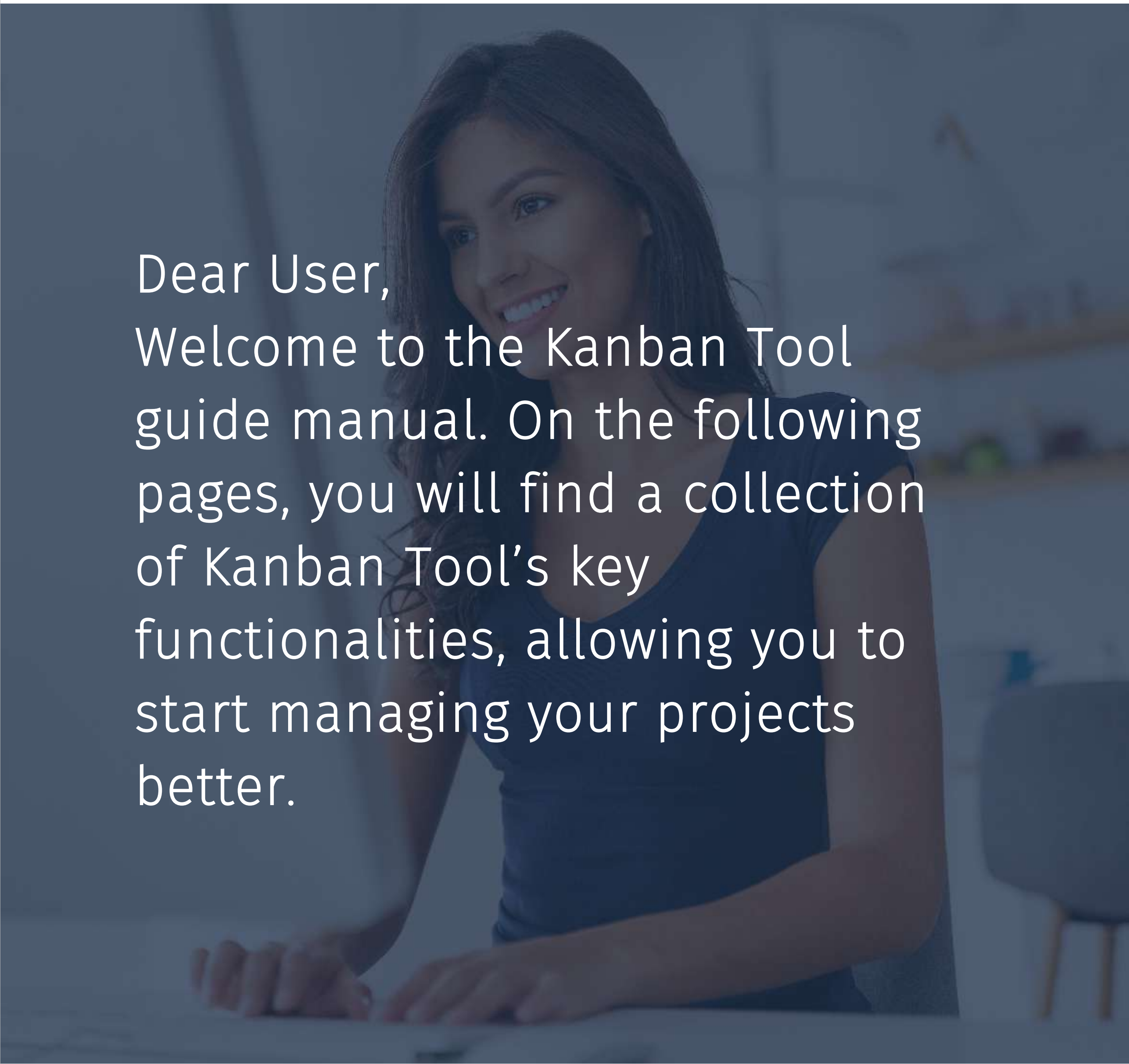
Kanban Tool

User Manual

kanban tool

Table of Contents



Dear User,
Welcome to the Kanban Tool guide manual. On the following pages, you will find a collection of Kanban Tool's key functionalities, allowing you to start managing your projects better.

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 and choose one of the predefined board templates that will allow you to start the work as quickly as possible.

You can also take advantage of the AI board assistant: provide a short description of what you'll do on the board, and the artificial intelligence assistant will suggest a board layout and types of cards that should work for your unique use case!

In the pre-made templates, there are two kinds of boards – simple and team, each with three sub-types:

1.1. Simple Kanban

A basic Kanban board template

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.

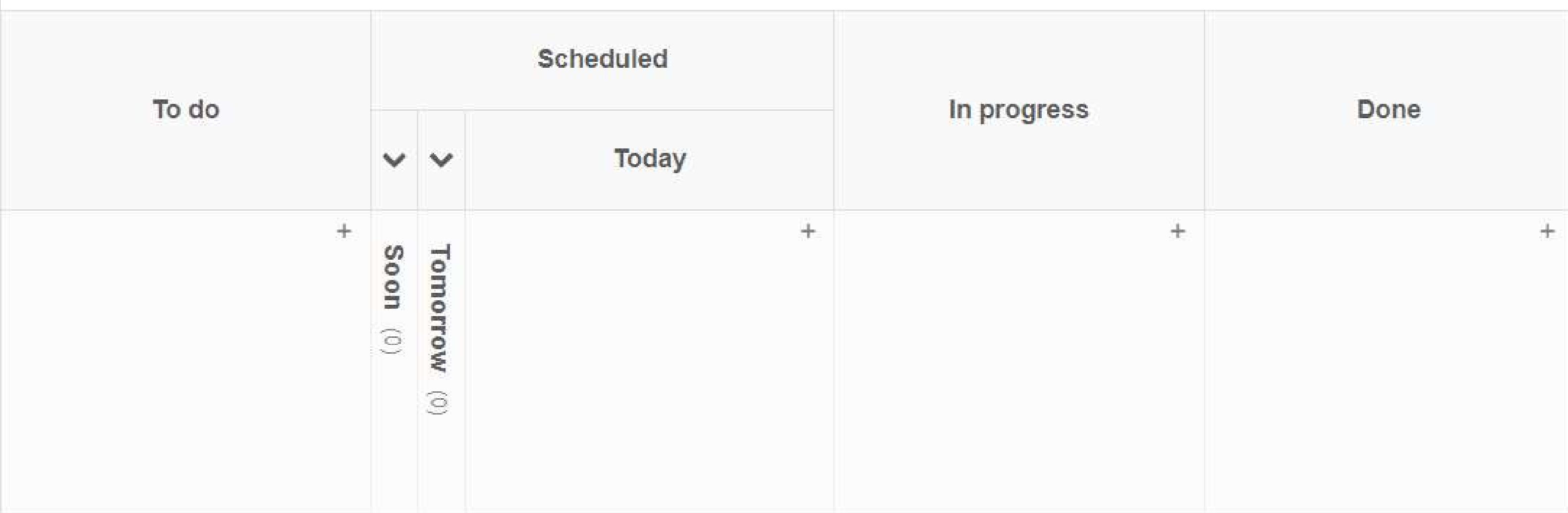
• **In progress** with limit to keep you from doing too many things at the same time.

• **Done** for reference and to track your performance.

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.

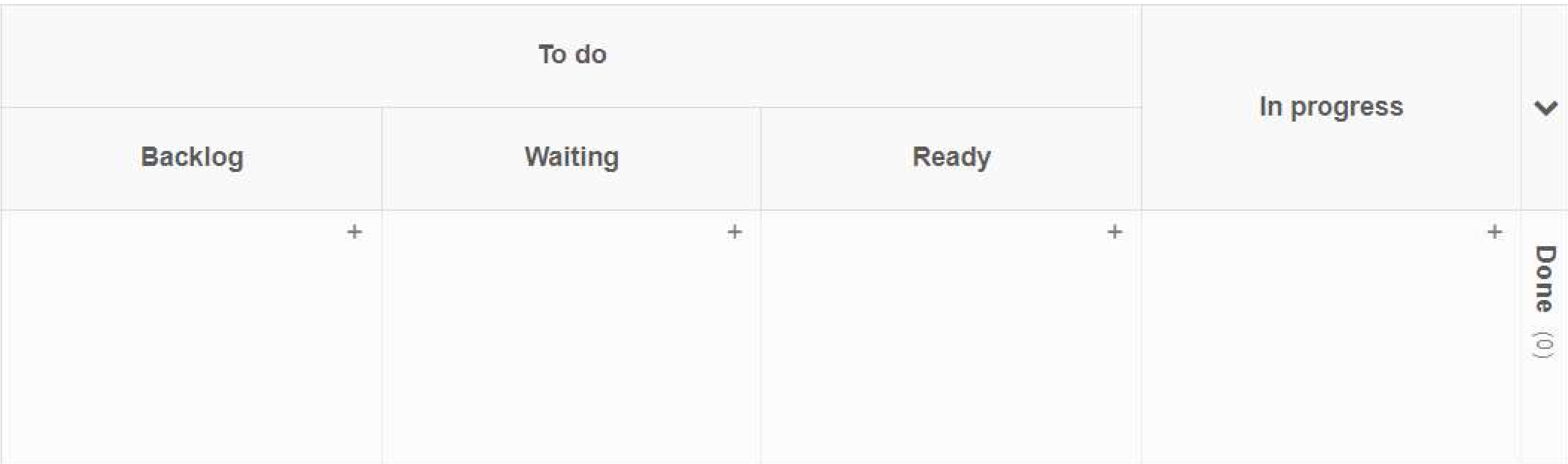


A time-driven Kanban board template

An event-driven Kanban board template

The event driven version of a basic workflow works best when some external event (like approval, or a predefined 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)
  - Ready - things ready to start working on
- In progress with an all important limit to keep you from doing too many things at the same time.
- Done for reference and to track your performance.



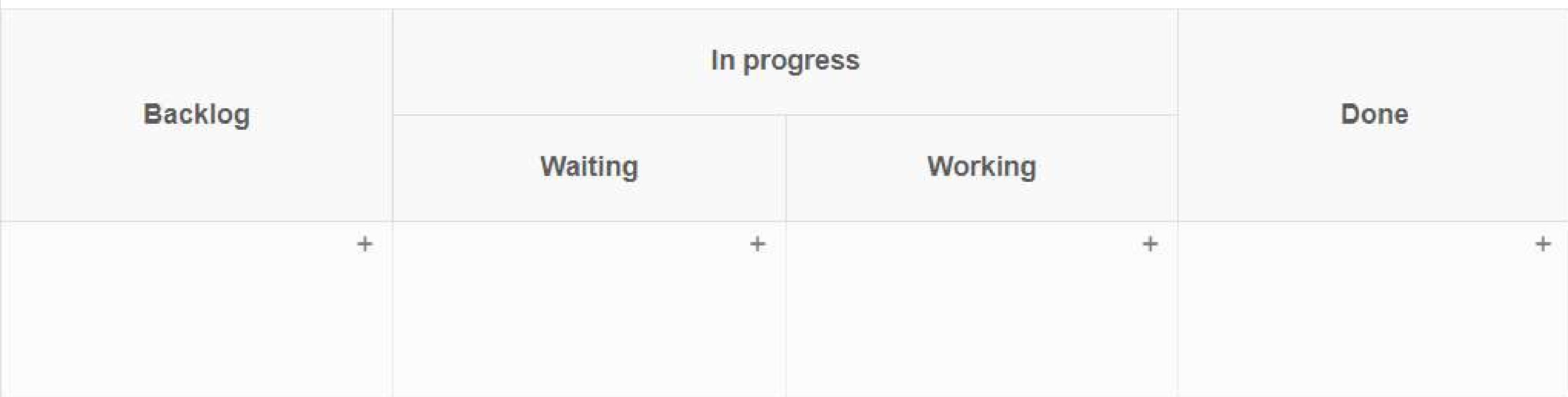
An event-driven Kanban board template

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.



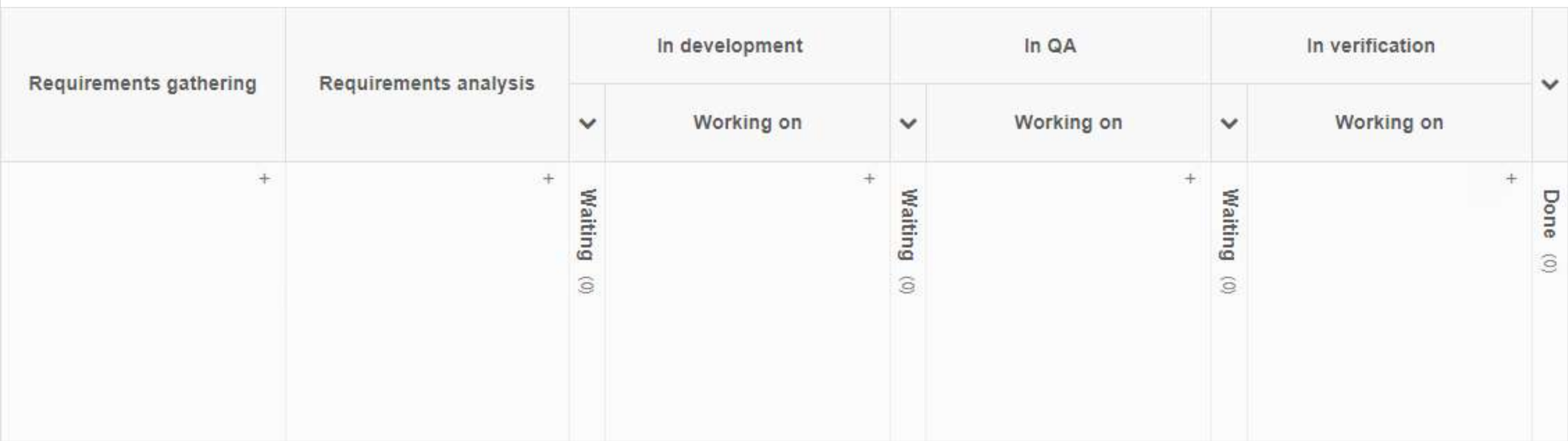
A basic team Kanban board template

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.



A team Kanban board template for product development

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

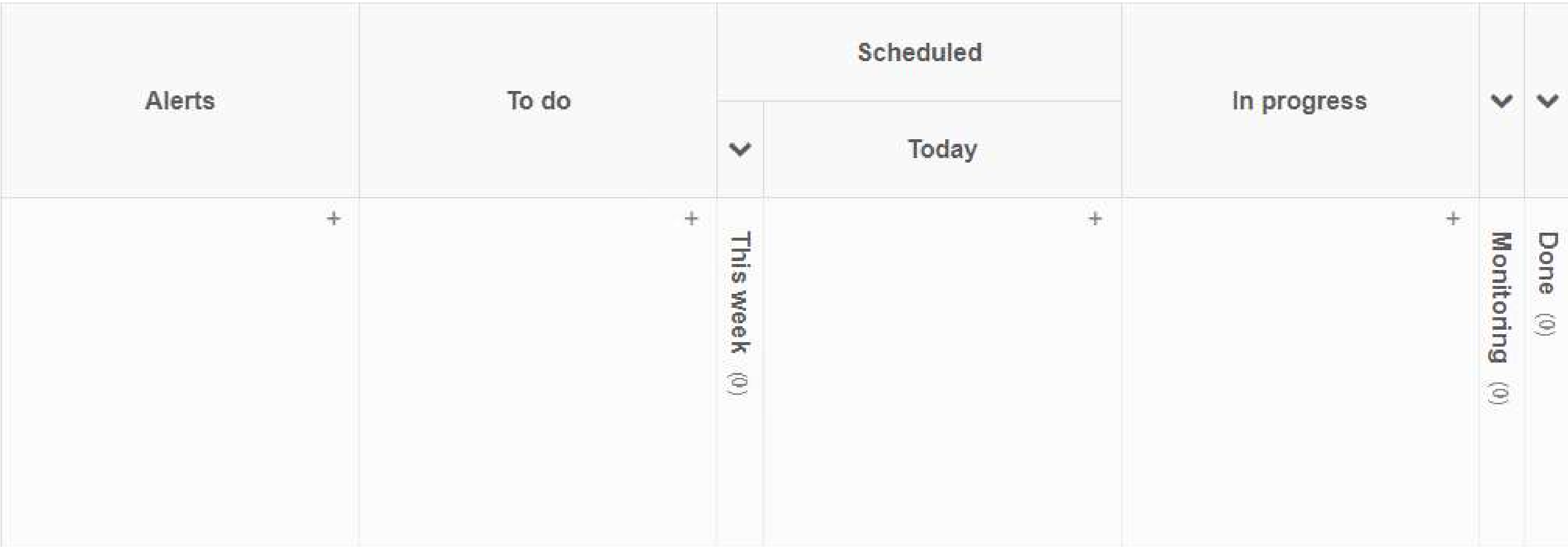
A team Kanban board template for a sales pipeline

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



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.

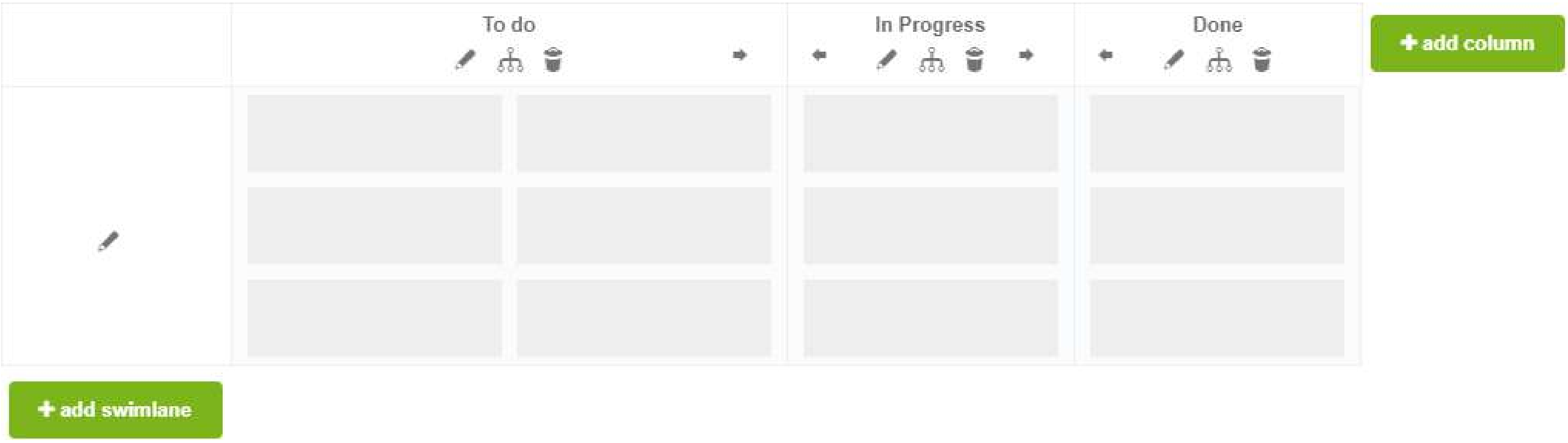
As you can see, there are many ways to design the board to suit the needs of a particular team or project. If you're unsure of what your team needs, we recommend starting with one of the simple workflows suggested by the "create new board" widget.
You can add new columns and swimlanes at any time, later on, should your team's and project's needs change.

2. Customizing your board

2.1. Editing the board

The „Board Editor" allows changing the layout of your project, as well as adding new columns and swimlanes to the workflow.

Access it from **Settings → Board Editor**, located in the top-right corner of your board view.



The board layout edition screen

In this view, your board is a little faded, and each column and swimlane has a set of four icons that can introduce changes:

- 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.

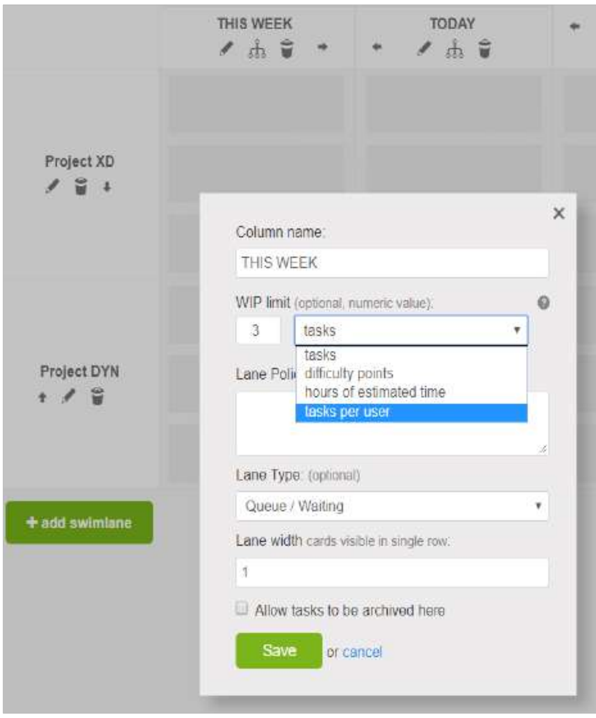
To add a column or a swimlane, click on the big green icon visible on the right and at the bottom of the board respectively.

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.

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.



Adding a WIP limit to a column

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.

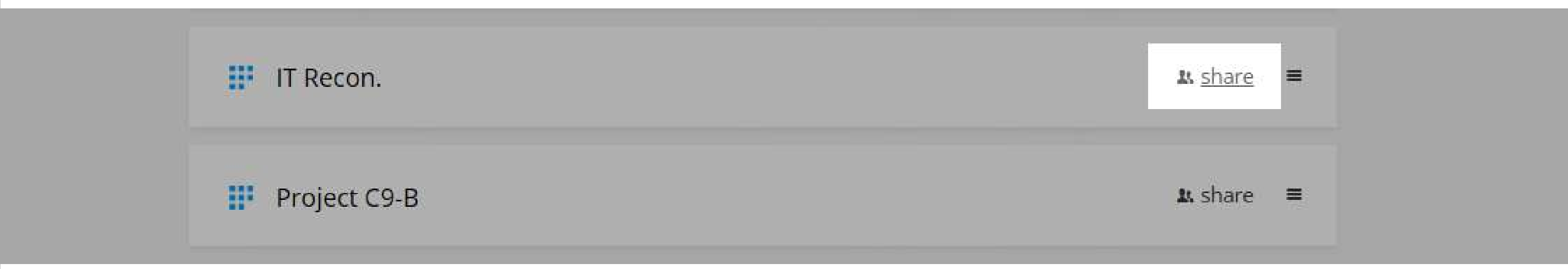
There, you can also assign privileges that determine how much change the particular person can introduce onto the boards:

- 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

Once you've added a team member to the account, you can share boards and folders with them. The easierst way to do this is to use a board or folder's „**Share with everyone**” option.

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.



Sharing a selected board with others

When you fill the pop-up form, the person will receive an email with their user name, password and URL to access your account.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.

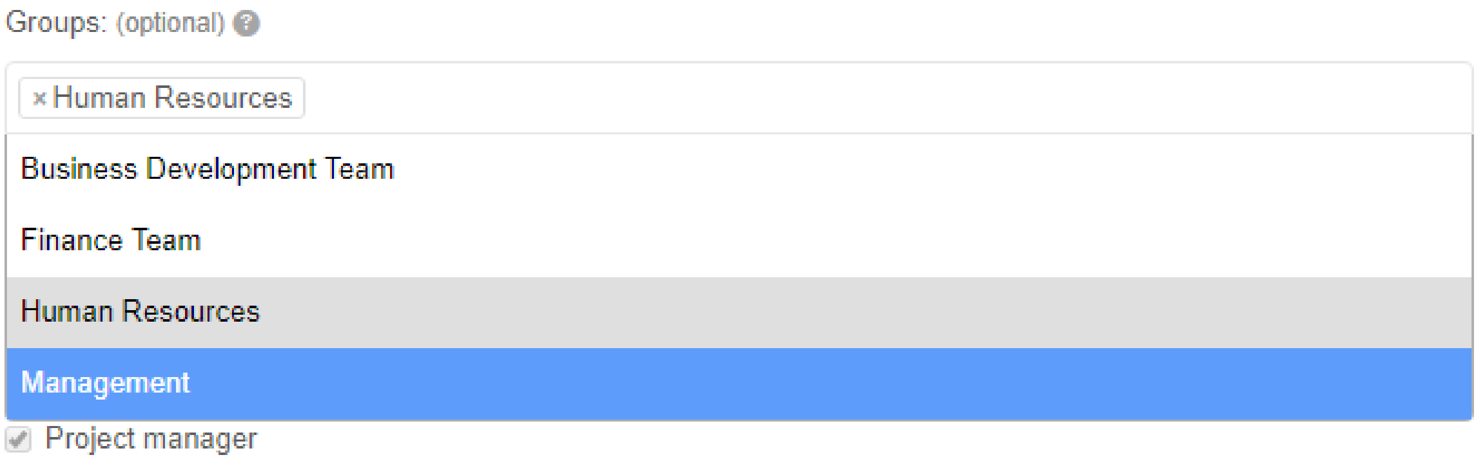
Individual boards can also be shared with others directly from the board view – just use the **Share** option in a board's top right corner, next to Settings, Tools and Help links.

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.

3.4. User groups – easier access management

Enterprise plan subscribers can take advantage of a user groups feature. This saves you from having to share individual boards with individual people –



Assigning a team member to a user group

instead, when creating users, you assign what groups they belong to. Then, boards only need to be shared with a group once – all current and future members of a group will automatically get access to them. It's a great feature for larger teams, for which data access control is crucial and user management more complex.
To learn more about user groups please visit this page.

3.5. Personalized company logo on your login page

Account owners can add a logo image to the account, making a visual connection between your company workflow and company branding. Simply upload a logo image from Account Administration - Account Settings. The image will be shown on your account login page, and on the dashboard.

A Kanban Tool dashboard with custom company logo

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 **+** 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

The „*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.

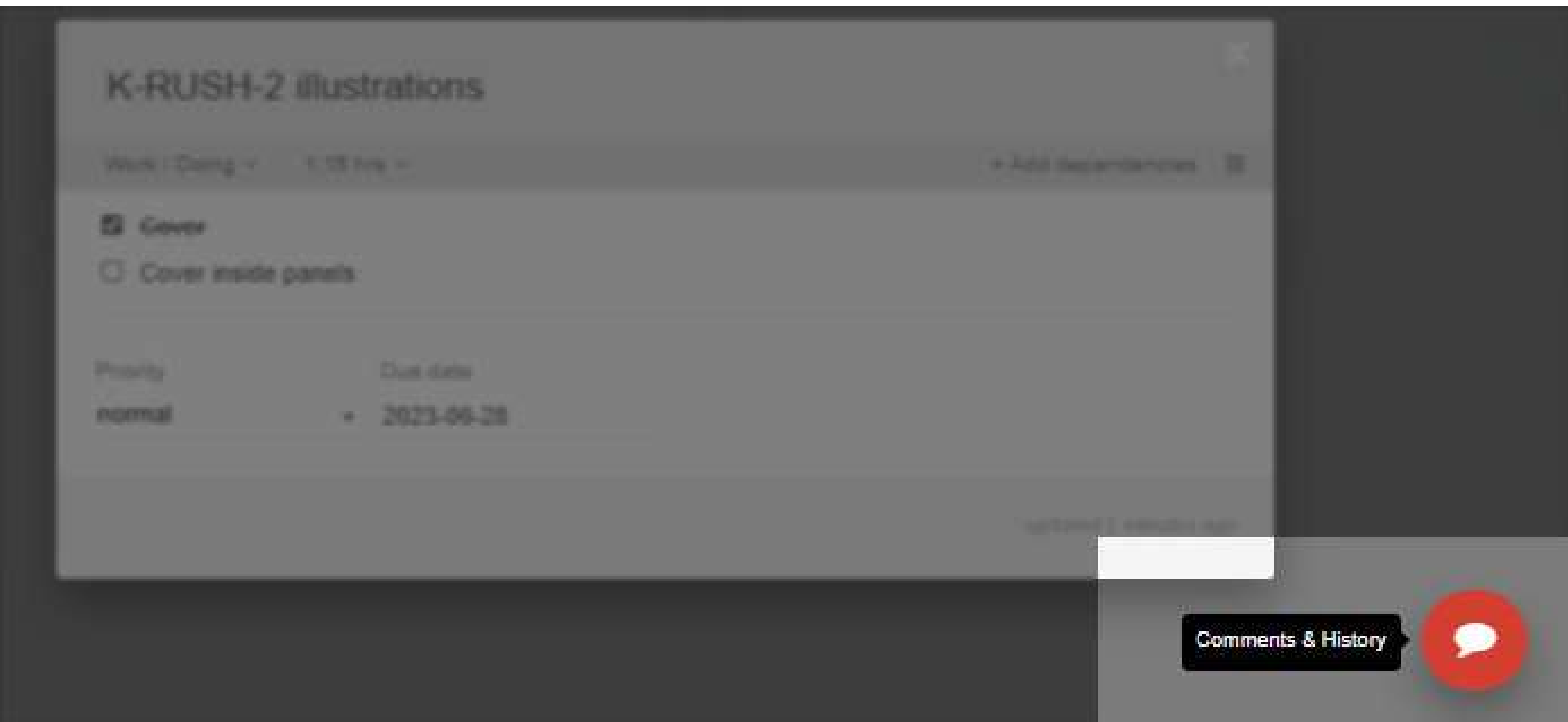
4.2. Editing Kanban Cards

Comments and card history

When you open your new card you will notice some additional options available. In the side panel opened with the red chat-like icon, any user with access to the board may leave notes concerning this particular task. Each comment 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 – given in chronological order, since the card's creation to the latest changes and comments. All changes are accompanied by date, time and name of the person who made them.

Comments are to be entered via the bottom text window, and can include attachments and links to convey more information.



Task comments & history icon

Comment notifications can also be sent to a specified person, people or user group via email. To address the comment to a team member, you can either click the area below the comment text editor, and select a user from the list, or you can type @Name, @Surname, @NS, or @group - directly inside the comment.
The person you point here to will receive an email with this comment and a link to the card.
Comments can be exchanged either by replying in Kanban Tool or by replying to the notification email – whichever works for you.

You can also reference other tasks in the comment message – to do that, type # in the comment creation window, and find the task to mention. Once the comment is made, the reference will turn into a hyperlink.

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.

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.

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.

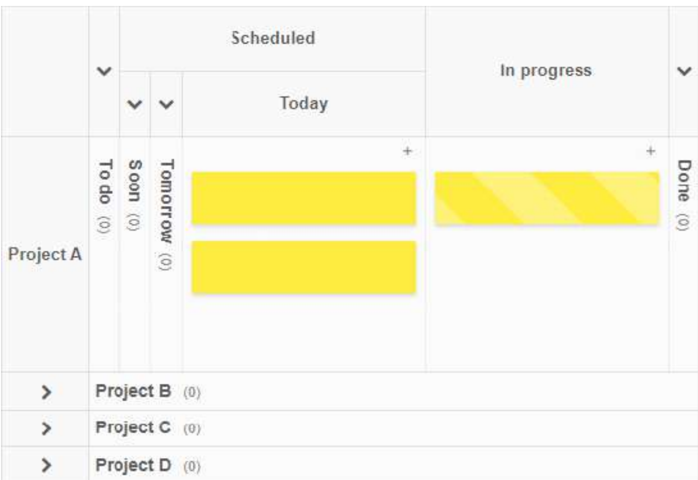
To move a card around the board just use the standard **Drag & Drop** method. You can also use a card drop-down menu. Just right-click on the card and select Move. This action will progress the card to the next column to the right.

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**.

5.1. Selecting several cards at once

To select a few tasks on the board, simply click on them while pressing the CTRL key. You can also select cards by **drawing an area rectangle on the board** with the mouse pointer, just like in your operating system. Simply mark an area to select the tasks in it.

You can move all of the chosen cards at once, or edit their properties – for that, right-click any of the selected items, and use the *Edit # tasks* option. Please see examples of these actions here.



A board with collapsed swimlanes and columns

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.

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. Settings are located in the top right corner of a board view – next to the Share, Tools and Help options.

In Card Template, you are able to choose from among several field types:

7.1 Description

You can enter your tasks' details in here and apply text formatting, including tables, images and links if desired.

7.2 Attachments

The field takes any file type, for as long as it does not exceed the 20 MB size limit. Graphic files and pdf will generate an image preview. You can also attach files from web services – to do that, please enable the Web Attachments, Google Drive, Dropbox, Box or OneDrive Power-Ups.

7.3 External link

It 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 is placed in a card, it will be possible to open with one click – both from an open and closed card (with the chain-link icon).

7.4 Card type

The types of cards – identified with a name and a color – make identifying and categorizing tasks easy and intuitive. If many colors are used, feel free to show a key to their meaning with the Card Legend Power-Up.

7.5 Priority

Useful for sorting tasks and planning the order of work in each column. Setting a card to high priority will show a red arrow on its front, and setting it to low priority will mark the task with a green arrow.

7.6 Start date

The start date will help you indicate when work on a task should begin. Using both a start and due date on cards will make for more efficient planning and allow you to achieve higher workflow clarity, letting you tell what matters the most and when. When a task has both the start and due date fields set, you will be able to preview its timeline in the large view of the Calendar Widget Power-Up.

7.7 Due date

It's the planned date for a task's completion. Once added, you will see a calendar icon on the closed task, and when the date reaches 9 days to go of fewer, there will be a countdown displayed on the card. Feel free to use due-date related board filters to easily plan your work.

7.8 Assignment

In here, you can choose which of the team members with access to the board should be tasked with working on the card. Assigning a task to someone sends them an email notification with a direct link to the task. The initials of the team member designated to complete the task will be displayed on its front. Users will also be able to filter the boards to see the work items that were assigned to them.

7.9 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.

7.10 Estimated time

The **Estimated time** field is designed to store your task duration guess. Additionally, the Enterprise plan clients can use it to get a visual clue comparing the time recorded while working on a task, to their estimate on how long that task should have taken.

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 learn more about this feature, please visit this site.

7.11 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.

7.12 Tags

To tag a card, just type it in under the Tags field and hit Enter. A tag that was added to at least one card on your board will become listed in other cards’ Tags drop-down. So, you only need to type a tag when it’s not yet present on other cards. When it is, you can simply select it from a drop-down. Tags offer a great way to quickly identify tasks by tag filtering.

7.13 Custom fields

This is the part allowing you to create **up to 15 custom fields**, that will appear on each of the board’s cards. Custom fields can contain either: free text, numbers, drop-down menus with options, external links, date pickers, web links, a progress indicator, an email address, votes, rating or an address. You can also set how much space a particular custom field will take on the card edition screen (width in %), or set the required data formatting for the text and number field types.

7.14. Different templates for different card colors

When editing the Default card template of your board, you are selecting the base template for all your cards.

You can, however, also assign other, more limited templates to specific card types (colors). If you switch over to a particular card type below the Default template - you will be able to remove or reorder some fields for that specific card type. So that different card types will have different fields on them, or have a different order of fields on them. It's a good way to make various job types use different card templates.

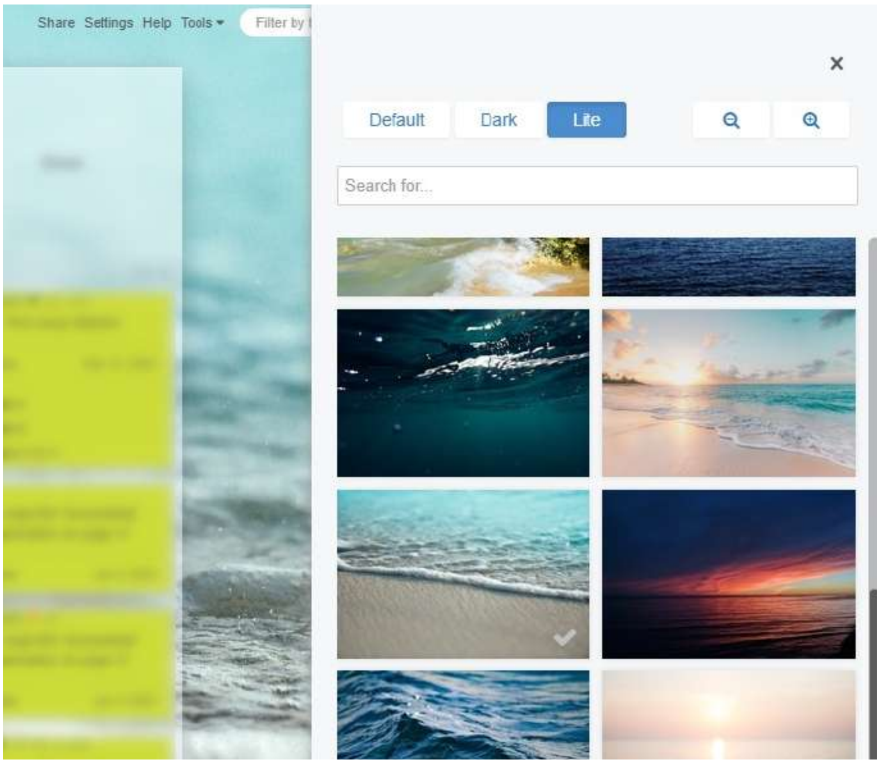
Please do keep in mind, that the Default template is your baseline here. In order for any card type to have a specific field on it, that field first needs to be enabled for the Default template. From the fields selected in Default template, you can then remove some for the specific card types. You can learn a bit more about using this functionality here.

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).

9. Customizing the board look

You can make significant changes to the way your board looks with the Board



Selecting a background image, theme and scale

Background option available from the Settings menu. It opens a search of the entire Unsplash image library and supports uploading your own images. You can also choose a color theme to match your image: Default, Dark, or the minimalist Lite.
While you're making changes to how the board looks, you can also **scale the board** to better suit your available screen size, using the magnifying glass icons.

10. Notifications

10.1. Basic 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**.

10.2. Additional notifications: Work summary & due task reminder

These are optional notifications

Work summary is a daily email, letting you know what tasks you and your team were working on over the past 24 hours.

Due task reminder email is listing your due tasks for the coming day – for today, if you choose to get this email at an AM hour, and for the following day, if a PM hour is set for the email arrival. You can manage your preference for these emails in My Profile – Edit my details. My Profile is available under your name displayed in the top right corner of the dashboard view.

You may also define completely custom notifications with the help of Automation Rules (*Enterprise plan only*). This is configurable from board Settings – Process Automation.

Also, you can create own due date reminders with the Task Reminder Power-up.

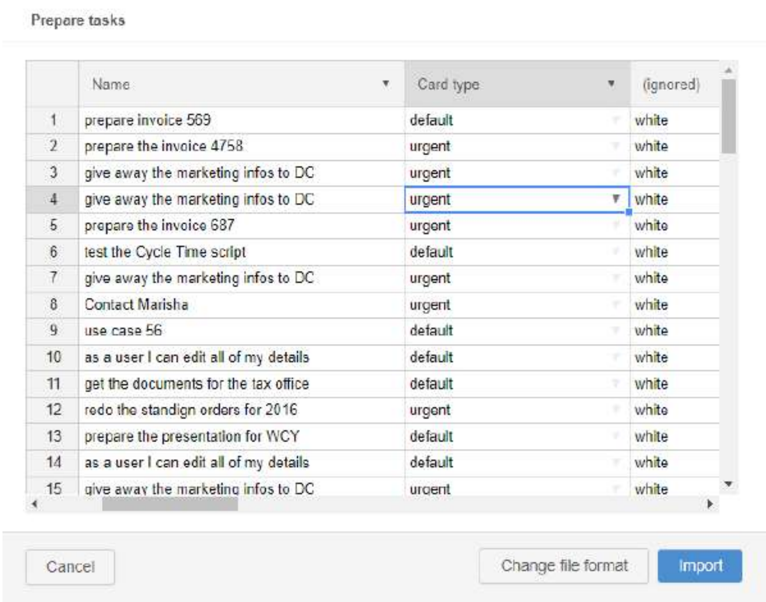
11. Import of tasks from Excel or CSV, mass updates on tasks & export to CSV

You're welcome to import a number of tasks to your board in one go - either by uploading an Excel or .csv spreadsheet, or by dragging a copy of data directly from an Excel sheet to the import window, or by typing task data into Kanban Tool's import table. To start, click the Tools menu and choose Import tasks.

If you're going to import a file, which contains a title row, naming what data type is listed in which columns, you should either delete this row before uploading, or use the built-in import option to change file format where you can select to ignore the first row. If the imported file seems to have incorrectly detected your data separators, you may also tweak this in here.

Once you've got the first row removed and data separators in order, it's time to assign which card fields are represented by which column. On many occasions, Kanban Tool will recognize some fields itself, especially if you're using a Kanban Tool export file to import back.

If your file has any empty columns, or columns you do not want or can't import back to Kanban Tool, leave the heading



Reviewing the import data

above this row as (ignored). For all other columns, be sure to choose the right data type field from the drop-down list.

In cases where you need to choose an option defined by the board settings, such as a card type - you can do this by hovering over the field - an arrow will show and let you choose the right type from a drop-down menu. This will happen for various field types - whenever you see this arrow, It means that cues are available for you to choose from.

After this, simply hit the blue Import button at the bottom. If there are any problems with the import, you'll see a black exclamation point - if you hover the mouse cursor over it, you'll see information about what exactly was the problem.

The import functionality also allows to make updates to tasks that already exist on your board. To do that, please be sure to include IDs of the existing tasks on the import list - the data you import for a task of that ID will overwrite what was there previously. It's a great way to mass update task due dates, user assignments, priorities or tags.

You can export all tasks from your board to an Excel or a .csv file. While on the board, please go to tools → Export tasks option to download your data export file. You will be given a choice of what information the file should include.

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.

Should you want to **put a task from the archive back on the board** – click the **folder icon** at the top of an archive-enabled column, and then right-click on the item that you want to unarchive. 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

The analytical metrics within Kanban Tool are available to you from the Tools menu, at the top right corner of a board view. In there, you'll find Analytics, Changelog and – if you're an Enterprise plan user – a Time Report.

13.1. 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.

13.2. 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.

13.3. 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.

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. Time Tracking configuration

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).

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.

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.

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.

Time Tracking records per team member

You can filter the report by: boards, time interval, users, task types, tags and swimlanes. Furthermore, you can sort the details below the graph by: users, tasks, current card type, boards, swimlanes or stages.

Grouping by column (stage) is of particular value to your knowledge about the process - with it, you can easily tell in which stage the team is spending the most time. Great information, if you're considering what specialists you need to hire more of.

Time records grouped by column

15. My Work 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 use this widget, you need to be using the Enterprise pricing plan.

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. You can also add tasks to My Work with the + icon visible in the widget title. To sort tasks with your own preferences, just use drag and drop.

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 may only edit their own time records. Account owners can edit anyone's time entries.

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

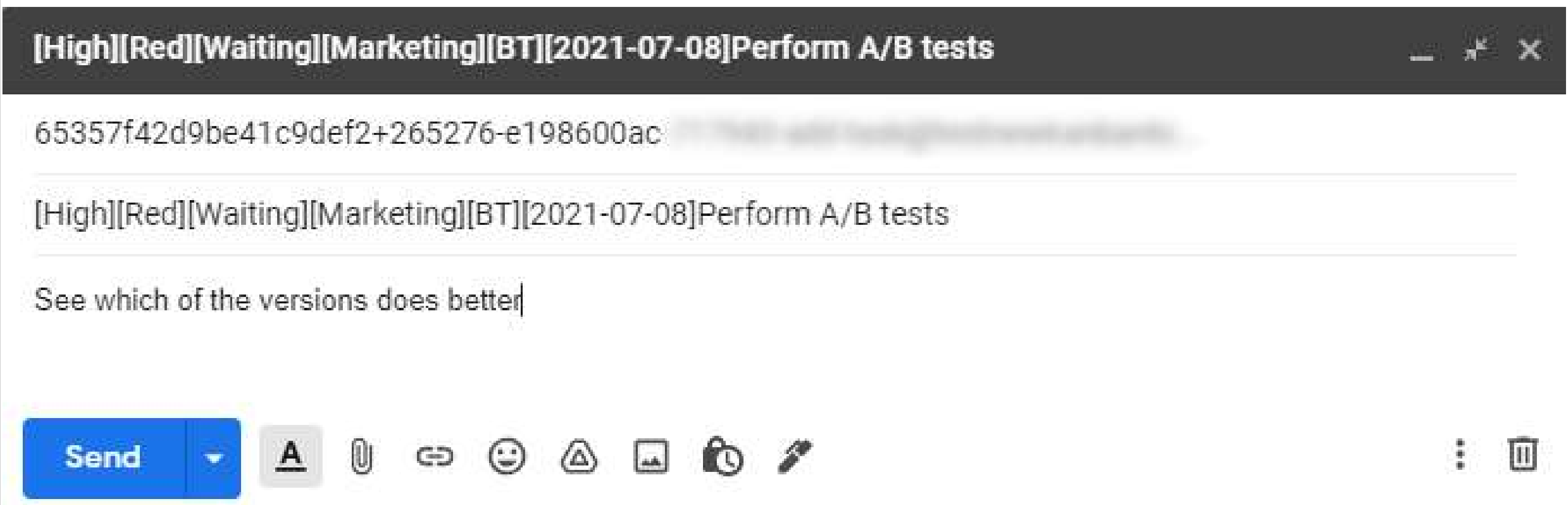
You can further determine the features of the task by adding tags to the subject of the email. Names of the tags [always written within square brackets] correspond with the names on your Kanban board and determine the location of the new task added to the board.

[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 graphic below shows a properly prepared task-creating email.



An example tasks-creating 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][Bill Thompson]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".

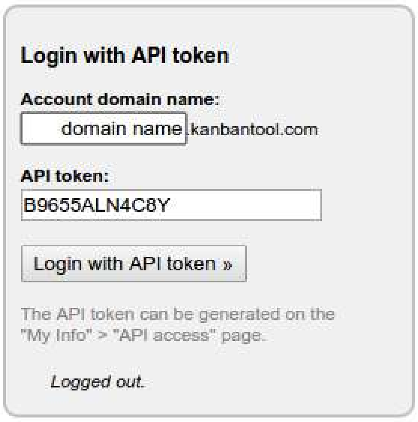
17. Kanban Tool integration

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.

Add task button for Chrome



Add task button configuration

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.

17.2. 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.

17.3. 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.

17.4. 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.

17.5. 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.

17.6. 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.

17.7. 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!

17.8. Google Sheets®

If you're looking to review tasks in a spreadsheet format and update several tasks at once, you can - either through direct board exports to Excel/CSV or via an integration with Google Sheets.

To move data from a Google Sheet to your Kanban Tool board - or the other way round - please follow these steps:
- In Google Sheets, open the sidebar and click the plus "Get add-ons" icon
- Find Kanban Tool and connect it to your Google account
- Type in your Kanban Tool account name and your API key
- Lastly, choose which of your boards you want to work with and what data fields you need listed, and click the "Import from Kanban Tool" button.

Any changes you make to the tasks data - e.g., task name, description, column or swimlane location, etc. - will overwrite the existing information when you export the data back to Kanban Tool.

You can also use the integration to create new tasks. Fill the spreadsheet with the task names and any other information you want to bring to Kanban Tool. Please maintain the one task per row format and specify the data field types in the first row.

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.

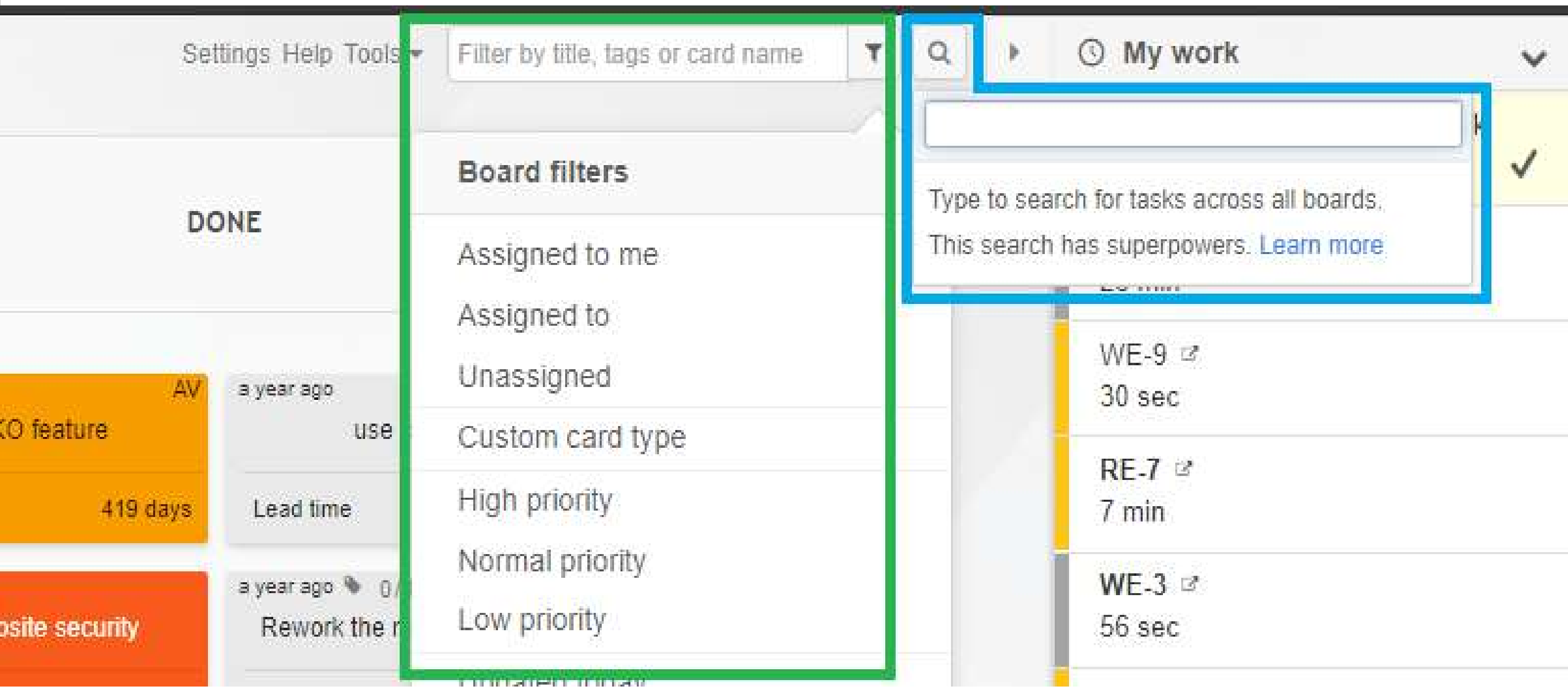
Board cloning

19. Speeding up your work – shortcuts, filters, global search & automation rules

You can view the list of supported **keyboard shortcuts** in the Tools menu, at the top-right section of any board, or directly on [this page].

You can also **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.

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]. The search can also be opened from within a task comment – just type **#**, and you'll be able to find other tasks to mention in your message.



Board filters (green), and all-boards-wide search (blue)

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.

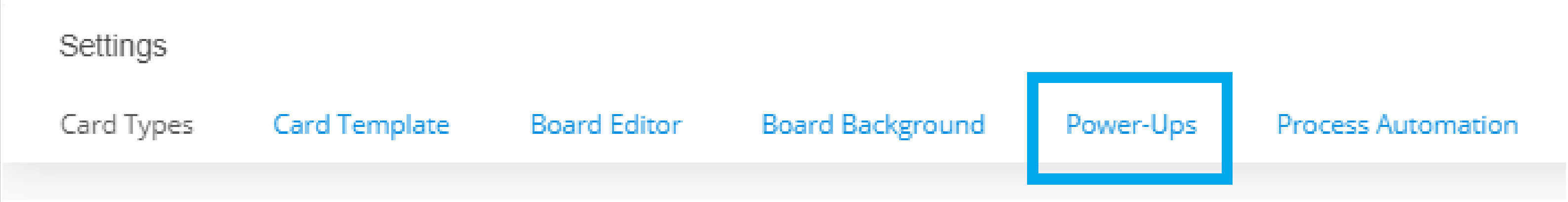
For the Enterprise plan subscribers, it is also possible to create custom Automation Rules. It's a clever way of determining an action on the board to be causing a reaction. For example, it's possible to make tasks of a certain type (color) get assigned to a relevant team member, or to change card priority basing on a set due date, or to set a custom email notification for when a card meets a set of requirements: task values, position in a given column or swimlane and many more.
To add Automation Rules to a board, go to board Settings - Automation Rules and use the widget provided. There are a few examples predefined for your convenience, but you are most welcome to create any rules possible on your own.

Process Automation is an advanced feature with a lot to offer. To see a few examples of Automation Rules being created please visit this page.

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 more usefulness.

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



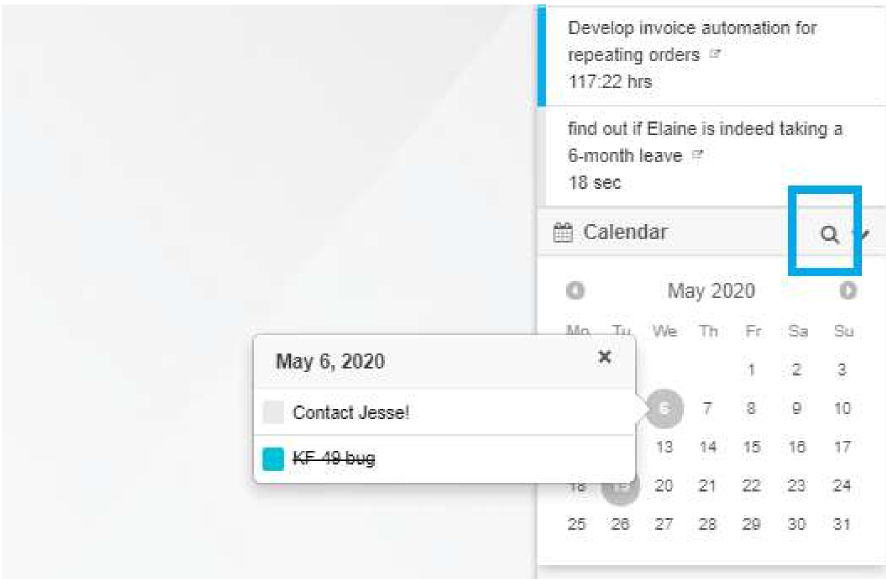
Kanban Tool Power-ups

Board settings are located in the top right corner of a board view – next to Tools, Help and filters box.

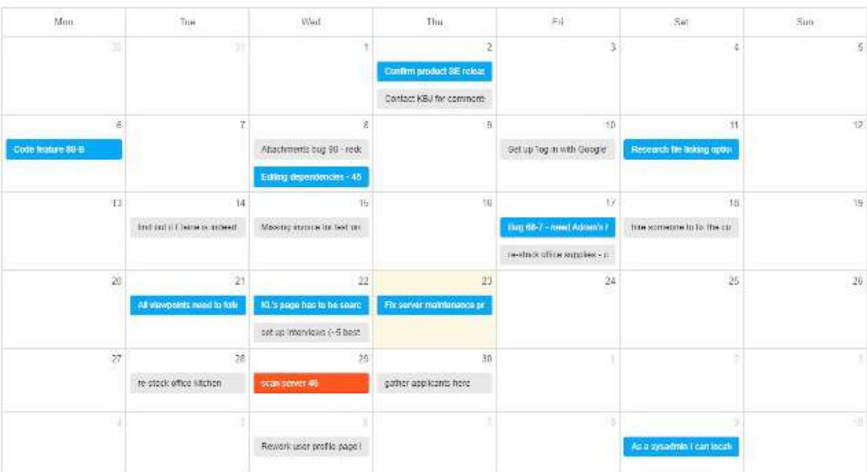
20.1. Calendar widget

This Power-Up is a simple calendar, that will be displayed in the side panel and highlighting your tasks' due dates. 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.



The calendar widget



The large view of the calendar widget

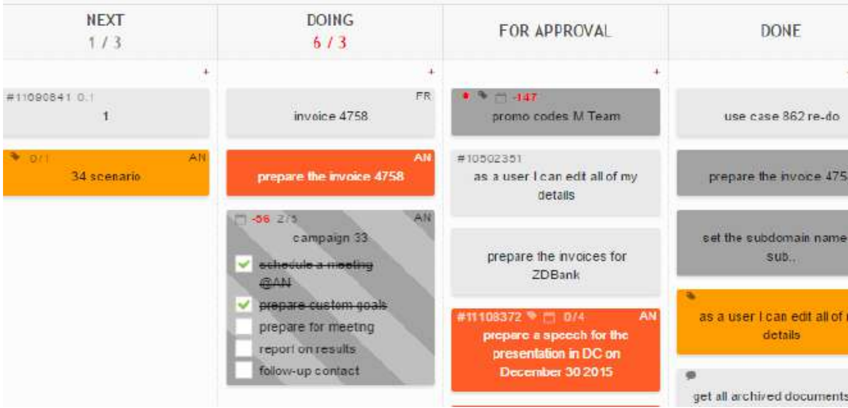
You can also view a large, interactive calendar - just click on the magnifying glass icon, highlighted on the image above.

Moving tasks in the large calendar view will update their due dates. You can also see a timeline view for tasks that contain both a start date and a due date.

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 firs incomplete one. Simply adjust the settings to match your requirements and enjoy the easy checklist access.



The Interactive checklist Power-Up

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.

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. 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.

20.6. 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.

20.7. 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.

20.8. Developer tools

Thanks to this Power-Up you can add custom scripts and style sheets to your board. You can write your own CSS/code and add it in via the CSS and Javascript slots in the Developer tools Power-Up! You can also choose from the below scripts that are read-made, just didn't make it to the main Kanban Tool project: http://github.com/kanbantool/scripts

At the moment we have the following scripts available:

Large font

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.

If you'd rather increase the size of all elements at once, give the **board zoom** a try – it's available as part of the **Board Background** setting.

Card tilt

It makes the cards look more like real-life sticky notes:

Delete all

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

Fixed card height

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.

Save and done

A "Move to done" 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

Offers an effect similar to the "Move to done" button action, but this one adds the option to the context menu (right-click on a task while in board view).

Change column

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.

Cycle time

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.

Swimlane auto-assign

Should you decide, that each of your board's swimlanes (rows) should hold tasks specific to a given user, you can set it up, so that when a card is moved to a specific swimlane, it will automatically be assigned to that person. An email notification will also be generated for each of these auto assignments. In order to make it work, you need to add a team member's name to the name of a swimlane and copy the script link to your board's Developer Tools window (as you do with most scripts).

Order highlight

Want to ensure that tasks are being worked on in the exact order of their priorities? This script will add a red highlight to a column, in which the task order does not match the correct order of task priorities.

The order recognized as correct is: high priority, normal priority (or no priority assigned), low priority.

User avatars

This script allows to show your team members' avatars on card fronts. To use it, you first need to have your team photos available online - URLs to these images need to be defined in this script. For best results, please add images for all of the team members. Leaving someone out will result with a broken image preview on cards assigned to them.

Once you have the images ready, copy and edit the code provided on this page and paste it in your Developer Tools *Javascript*-highlighted slot.

Show all settings

Using this script, you''ll enable new menu options for quicker board editing:

- T - for Card Type setting
- C - for Card Template settings
- W - for Workflow editor
- P - for Power-Ups selection
- B – for Board Background options

- A - for Process Automation rules.

Card opacity

This script will make your closed cards appear semi-transparent, giving the board an overall lighter feel. Looks best when combined with the Lite board Theme.

Checklist progress bar

With the Checklist progress bar script, you will see an additional white progress bar on your closed cards, showing what percentage of checklist items have been completed.

Column images

If your team will find images on each column to help with visually identifying the workflow stages, take a little moment to make this possible. To get it done, you will need to upload the images to the Kanban board (i.e. to a task) and edit the script to match your workflow stages names. Please learn more and see a preview of what this may look like here.

Large interactive checklist

This script will increase the font of the checklist items shown on closed cards. If you'd rather increase the size of all elements at once, give the board zoom a try – it's available as part of the Board Background setting.

Card saturation

This add-on decreases the saturation of your card colors. You can also customize the saturation, by changing the 0.8 saturate value to something else (click the link from our Github repository page to make this change)..

No archive

The No archive script hides the “Archive” option from the tasks’ context menu for all users except for account admins and owners. It’s a good way to ensure that only high-access-level team members get to say which tasks are ready to be put away.

Shorter swimlanes

The regular, minimum height of swimlanes is 3-cards tall. If your board has many swimlanes, or if you want to make the board less long for any other reason - you can, with the Shorter swimlanes script.
There are two options to choose from:

- */scripts/shorter-swimlanes/shorter-empty-swimlanes.css*

  This script will change the height of empty swimlanes, while adjusting all other lanes to the number of cards that are in them.

- */scripts/shorter-swimlanes/shorter-swimlanes.css*

  This one will shorten all swimlanes of the board, and make them scrollable. *Please note, this variant is only supported in Microsoft Edge and Google Chrome*.

No priority

Since task priority is a value that most Kanban Tool users apply to their cards, we make the priority assignment available from 2 spots: from either the open card view or from the card's context menu.

If you don't want the board to support priorities at all you'll need to:

- disable Priority in the Card Template settings and
- apply the No priority custom script, which will remove the card context menu option.

Large board headers

You can increase the font of your column names with the *Large column headers* script. It makes the font proportionally larger, even when you zoom in on the entire board view.

Column background

The Column Background script lets you fill an entire column, or swimlane, with color, highlighting it throughout its length. The script needs modifying, so that the column and swimlane names match your board's custom titles.

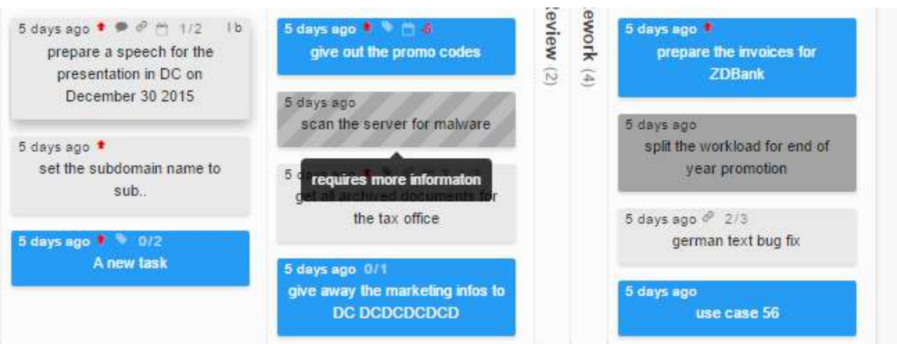
Task opening/closing starts/stops the timer

The Time Tracking automatically measures time on a task moved to an "In Progress" Lane Type and pauses when it moves to any other column type. If you'd prefer for the system to record working time when you're viewing an open task (have the card's full view expanded) this is possible. Use this script to have the timer start when you open a task and pause when you close it.

Task dependencies highlight

Your task dependencies show up in an open task view as a list. If you'd like to get visual hints on the board itself, showing which tasks depend on a given parent task, use the Task dependencies highlight Developer Tools script. The parent/master task will keep the regular highlight style, but the dependent items will get an additional highlight, in a different color.

20.9. Card block



The Card block Power-Up

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.

20.10. 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.

20.11. 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.

20.12. 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.

20.13. Activity notice

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.

20.14. Kanban cast

This is a great way to make your Kanban Tool boards into an information radiator and to keep the team always informed of current activities. Please go to Kanban Cast section of this User Manual. to find out more.

20.15. 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.

20.16. 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.

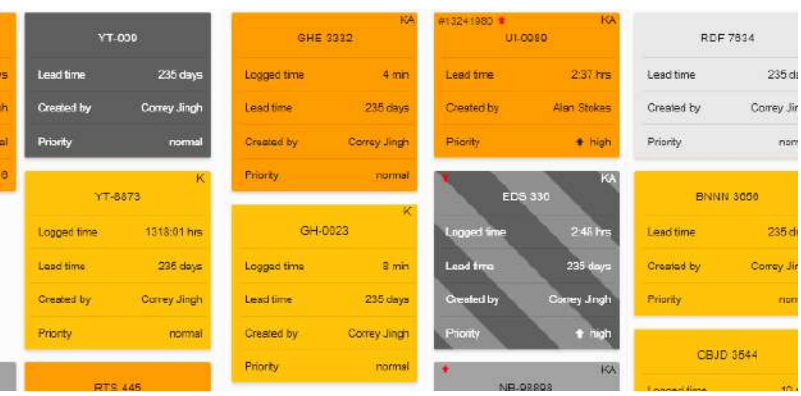
After the templates have been prepared, you can choose a template for any new or existing card.

20.17. 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.

20.18. Task summary



The Task summary Power-Up

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.

20.19. Card legend

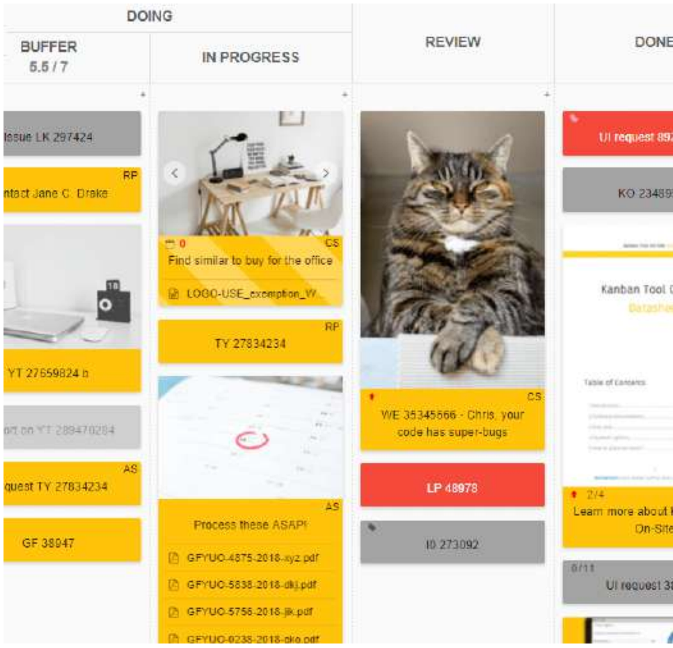
This add-on will show you the names and colors of card types used on a board, right at the bottom of the board. So, without having the view of your board obstructed, you will be able to quickly find out which color symbolizes what type of task.

20.20. Card covers

If you wish to see images on closed cards, simply enable Card covers in board Settings → Power-Ups.

Now, you can select any of your graphic files or pdf attachments to become a card cover or covers - selecting multiple files with the eye icon will create a gallery on your card.

Furthermore, any of your file attachments or Web Attachments can be pinned to the card front. This will make your files accessible directly from the closed card view, great for an easy preview or download.



The Card covers Power-up

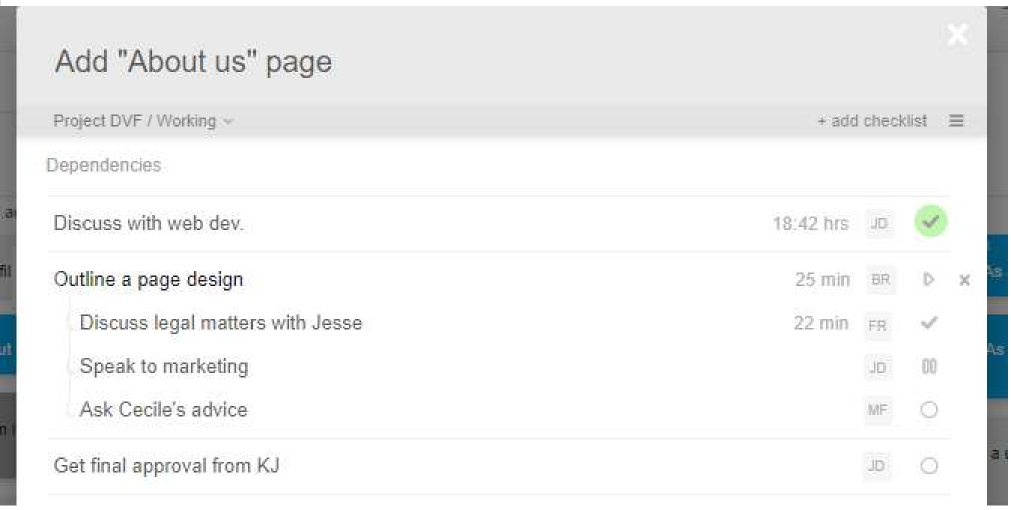
20.21. Pinboard

The Pinboard Power-Up lets you attach frequently needed files and links to websites or online documents - directly to the board's side panel. It needs enabling in board Settings → Power-Ups.

To pin a file, just use the + icon, located in Pinboard's header. And to pin a website link, first make sure that you have enabled either Web Attachments, Google Drive, Box, Dropbox or One Drive Power-Up.

20.22. Task dependencies

Task dependencies allow for building relations between cards, to visually connect work items that need doing in bunches. This way, complex work gets broken down into items of a more manageable size, giving a clear picture of how far along a big job has come. It's a great way not only to bring order to large tasks, but to also show parent-child card relations, and to delegate pieces of work to other team members or boards.



A hierarchy of dependent cards with status icons on individual tasks

Once activated in board Settings → Power-Ups, there will be an "+ add dependencies" link in an open task's header, with which you can connect tasks to each other. With it, you can either create a new, dependent task, or link an existing one as dependent.

Any task that you have access to can be made dependent on another - you can build dependencies between tasks across all columns, swimlanes and boards. Dependent tasks can be opened directly from the master task view, and will be shown over it.

A tree-like scheme of dependent tasks shows additional information about cards status - you may come across backlog, in progress, waiting and done icons. They relate to what lane type column that task is in, thereby hinting on their completion stage. If present, team member assignments and any tracked time records will also be displayed in the tree-like list.

20.23. Task reminders

This Power-Up allows you to set custom reminders about any date listed on tasks (due date or custom field date). The reminder can take the form of an email, or of an action, i.e. moving a task to the top of a column, changing its color or priority, etc.

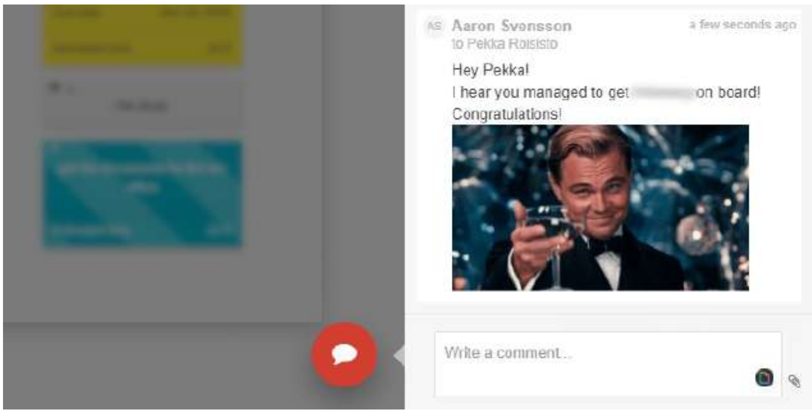
To use it, click the date field in an open card view, and select to "+add reminders".

20.24. Board readme

Board readme allows you to add an information window to your Kanban board, to - for example - explain to the team, how a particular board should be used. Describe what are the board's do's and don'ts, whom to contact for the final say, etc. Feel free to add anything else that you think will be helpful for the team's understanding of the workflow - you can even use it as kind of a team notice board!

20.25. Giphy gif picker

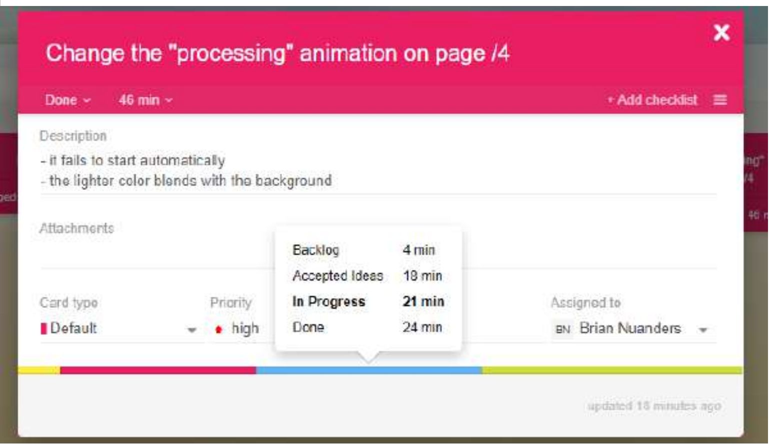
Giphy gif picker enables the optional Giphy emoticons support in your task comments. Using animated images will make team collaboration more fun and a lot faster, in many cases!



Gif image used in task comments

20.26. Time in stage

This Power-Up will show you how much time a task has spent in each process stage. It will be of help when analyzing the regularity & flow of your process, or when looking at which process steps may need engaging more people. The colorful horizontal Time in stage bar represents the proportion of time a task spent in each of the board columns.



The Time in stage Power-Up

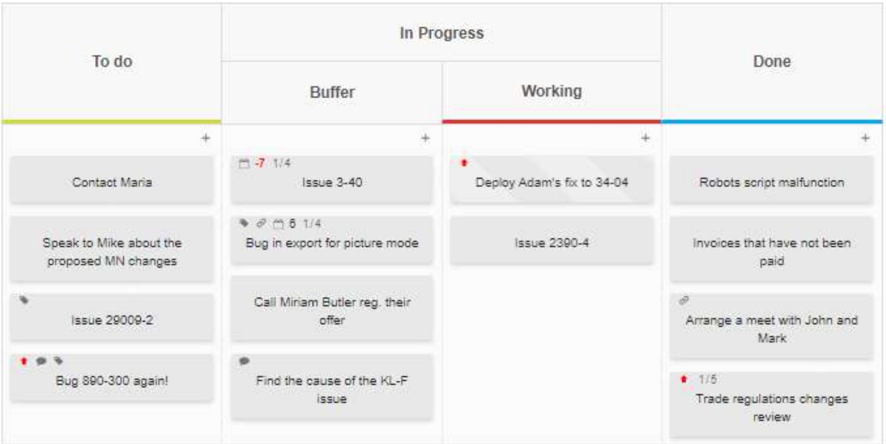
The colors across the bar will always align with respect to the applied lane type, rather than to specific columns. Columns can be set to use a Backlog, Waiting, In Progress or Done lane type.

To find out how long the task has spent in each specific column, just hover the mouse pointer over the bar, to see a detailed list of time spent in a given stage.

20.27. Column highlight

This Power-Up can make your boards easier to read and use, by letting you underline columns with colorful strips, which speeds up the identification of specific process stages.

You can highlight just one column, e.g., the Doing column on a multi-stage board, or all of them, to better associate a color with a process step.



The Column Highlight Power-Up

20.28. Work timer

The Work timer lets you define the length of a focused work session - continuous working - and the duration of breaks between the sessions. You can also specify the total hours you want to work in a day.

Additionally, you can select a background sound for focused work, e.g., a calming sound of rain or a ticking clock, and a sound to tell you when it's time to take a well-earned break.

If you're using the Kanban Tool Enterprise plan with Time Tracking & Reporting, activating and pausing the work timer can optionally synchronize with your tasks' Time Trackers. So that you'd only need to stop work in one place - either in Work Timer or in My Work.

To edit the Work Timer settings, click on the blue timer in the middle, or the hamburger settings icon in the top-right corner of the clock.

20.29 AI assistant

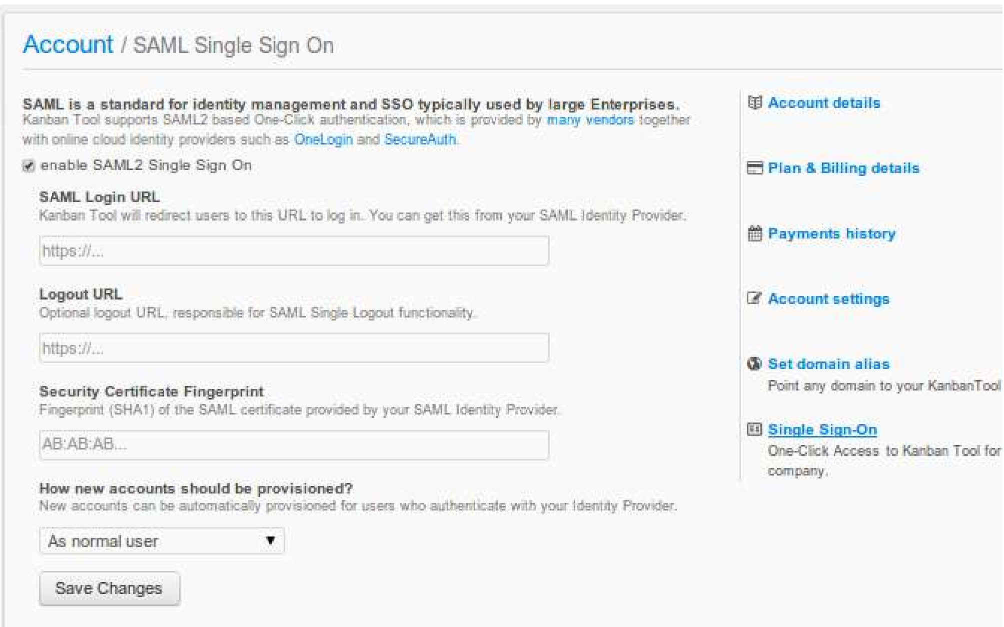
The AI assistant Power-Up is a cutting-edge artificial intelligence technology integration, that can save you time and ensure that tasks are well-planned and comprehensive. The AI Assistant can give you **smart list item recommendations**, and **task suggestions**, based on your few-words-long text prompts, describing the goal of your work.

To use AI assistance in your work planning, first enable the AI assistant Power-Up in settings. Then, to receive task ideas, right-click a column of your board and use “**Suggest tasks**”.

And to get smart checklist item ideas, open a task, and click “**+ Suggest checklists**”. It's that simple!

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.



Setting up one-click access to Kanban Tool

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.

22. Two-factor authentication

Two-factor authentication adds an extra layer of security to your Kanban Tool user authentication process, by asking you not only for your password when logging in, but also for a secret time-limited verification code. You will need to read this code from a dedicated mobile application on your phone, and type it on your login screen every time that you log in.

The application that you need to install for this is Google Authenticator (Android, iOS), Microsoft Authenticator (Android, iOS) or any other compatible 2FA application.

The 2FA feature is available to each user of your account individually - every user needs to set it up for themselves.

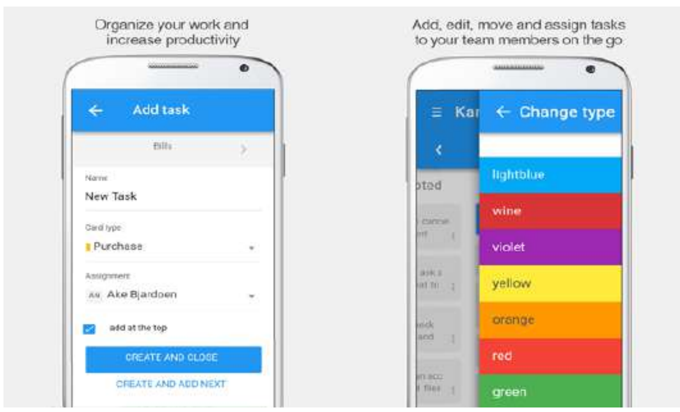
To enable 2FA for your user account, please go to My Profile (available under your name displayed in the top right corner of the dashboard view) - Two-factor authentication and click Set up two-factor authentication.

For more details on how to set it up, please view this guide.

23. Mobile support

We welcome you to use dedicated Kanban Tool mobile applications to update your workflow on the go:

- Download Android application
- Download iOS application



Kanban Tool for mobile devices

24. Video tutorials and use cases

Please also consider viewing our product demo video and other tutorials. We have also prepared a few common Kanban Tool use case videos for you to take inspiration from.