

Kanban Tool - Excel Task Creating Macro Guide

You can create tasks automatically from within Excel. The code will use the cells you selected and create a task for each cell. A link will be created on the cell, to the task in Kanban Tool.

Cells which already contain a hyperlink (task created before using this macro) will get the name from an existing task in Kanban Tool updated to the current value.

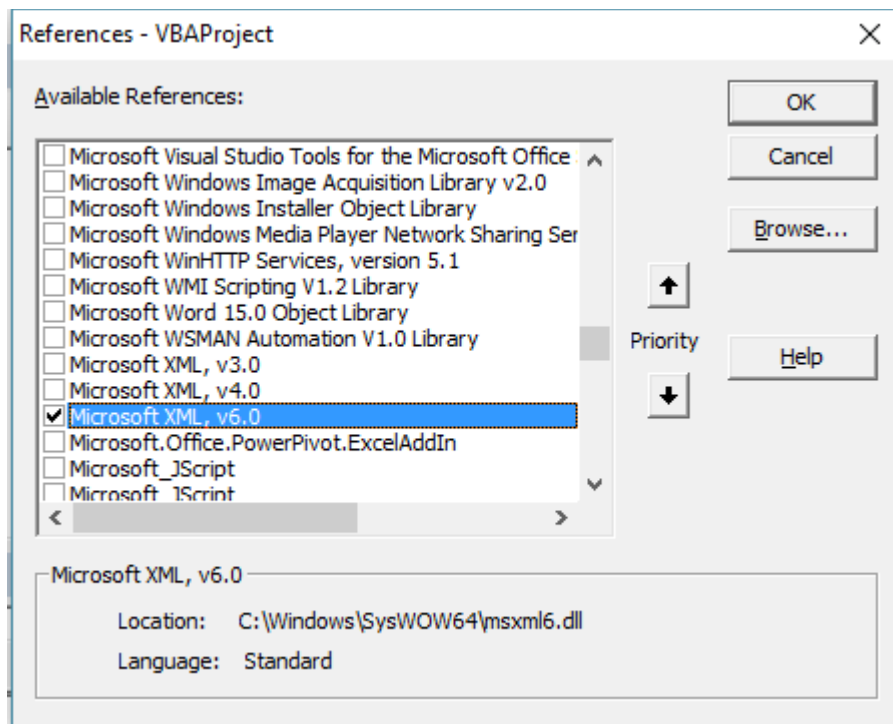
To implement this you will need to import the code, and then create a trigger to activate the code.

1. Importing the code

- A) Download the Task Creating [bas file](#)

In case you are using an instance of Kanban Tool On-Site (offline Kanban Tool on your company's own server), please use [this .bas file](#) instead.

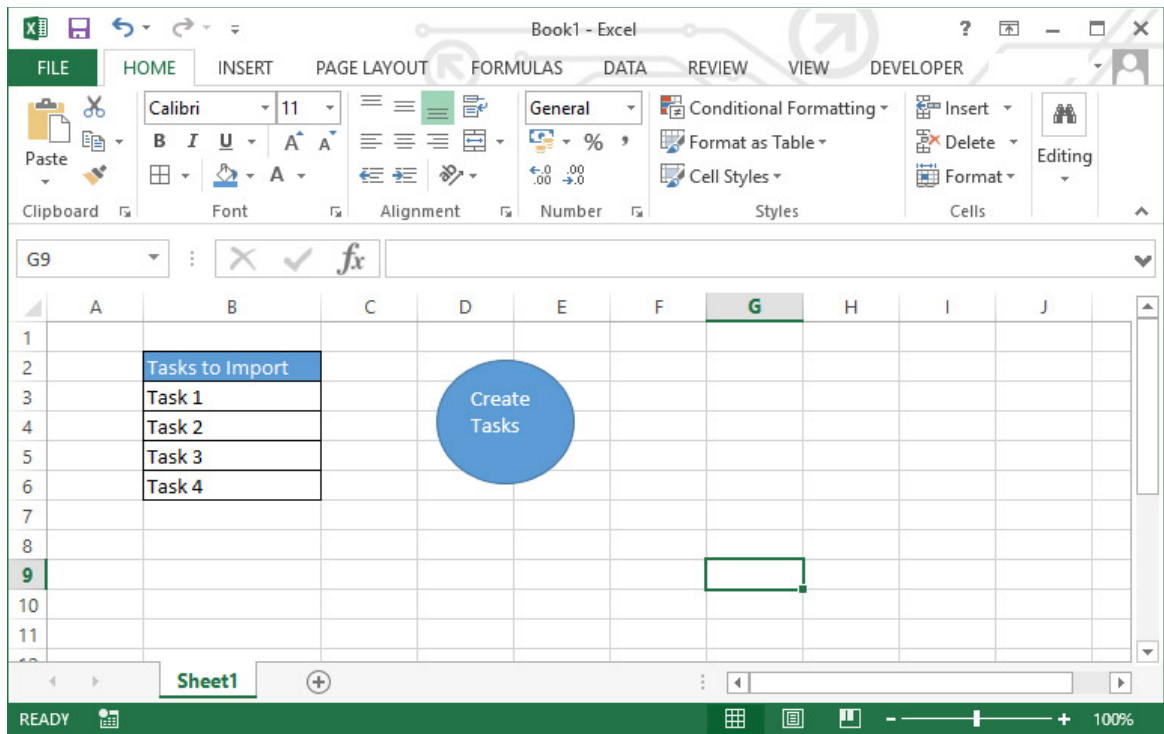
- B) Open the 'Visual Basic Editor', either by pressing shortcut key ALT + F11, or on the Developer ribbon clicking on 'Visual Basic'
- C) Import the file you downloaded. Click on 'File', 'Import File'. Browse to the downloaded file and click 'Open'
- D) Make sure the correct reference is activated. This step might not be needed for everyone. Click on 'Tools', 'References', and select 'Microsoft XML, V6.0'. Click ok.



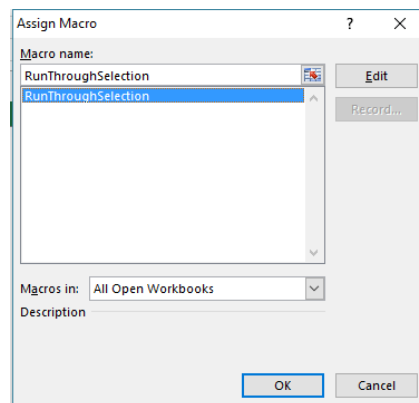
E) Close the 'Visual Basic editor'

2. Creating a Trigger for the code

- A) You can 'Assign a macro' to almost any shape or graph in Excel. We will add a shape from the 'Insert' ribbon, 'Shapes'. Choose any.
- B) Right click on the shape, and choose 'Edit Text', enter something like 'Create Tasks'. You can format the shape as you like, with different colours or fonts.

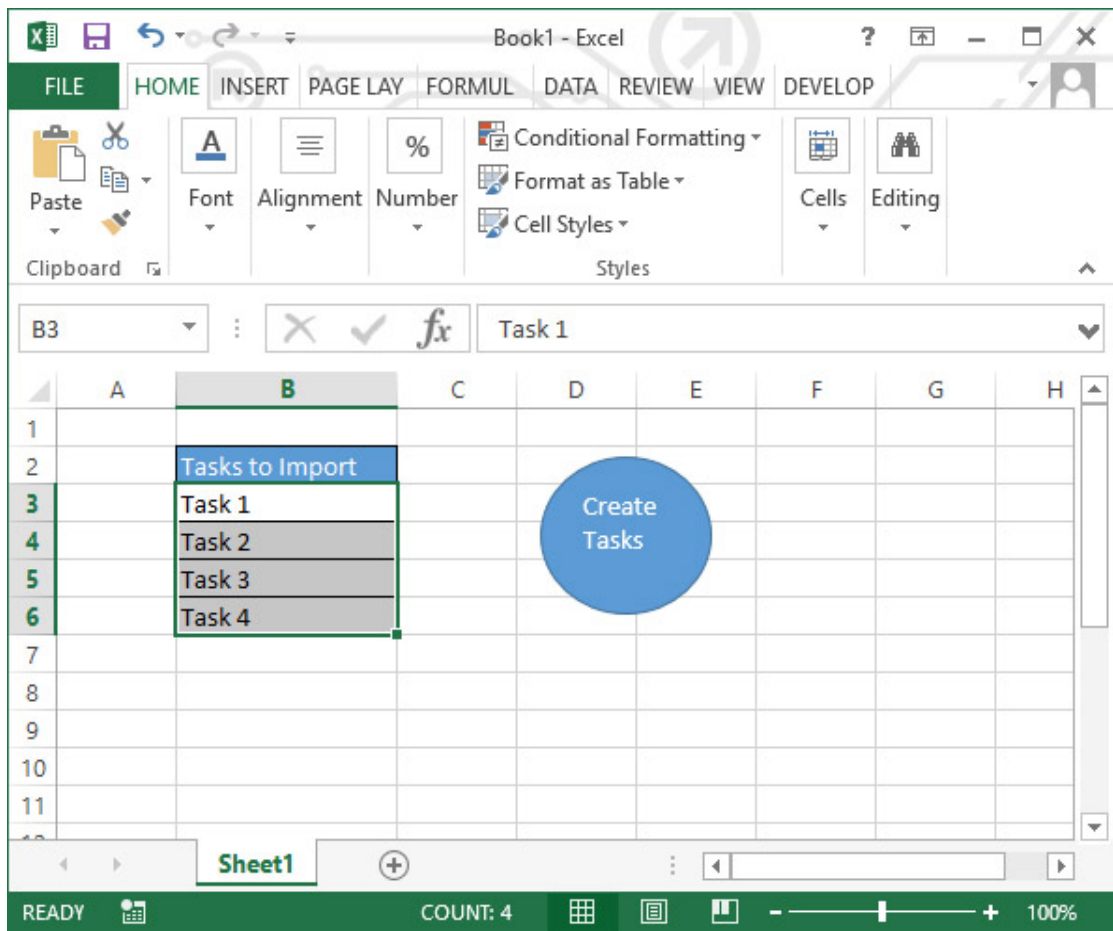


- C) Assign the macro to the shape. Right click on the shape again and choose 'Assign Macro'. Select 'RunthroughSelection' macro. Click on 'OK'.

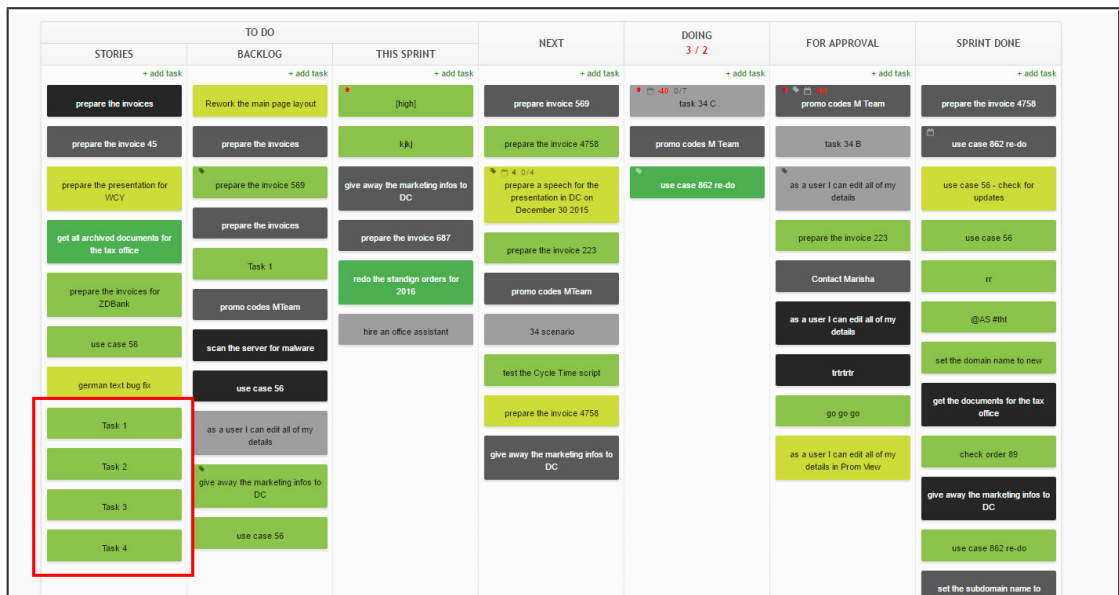
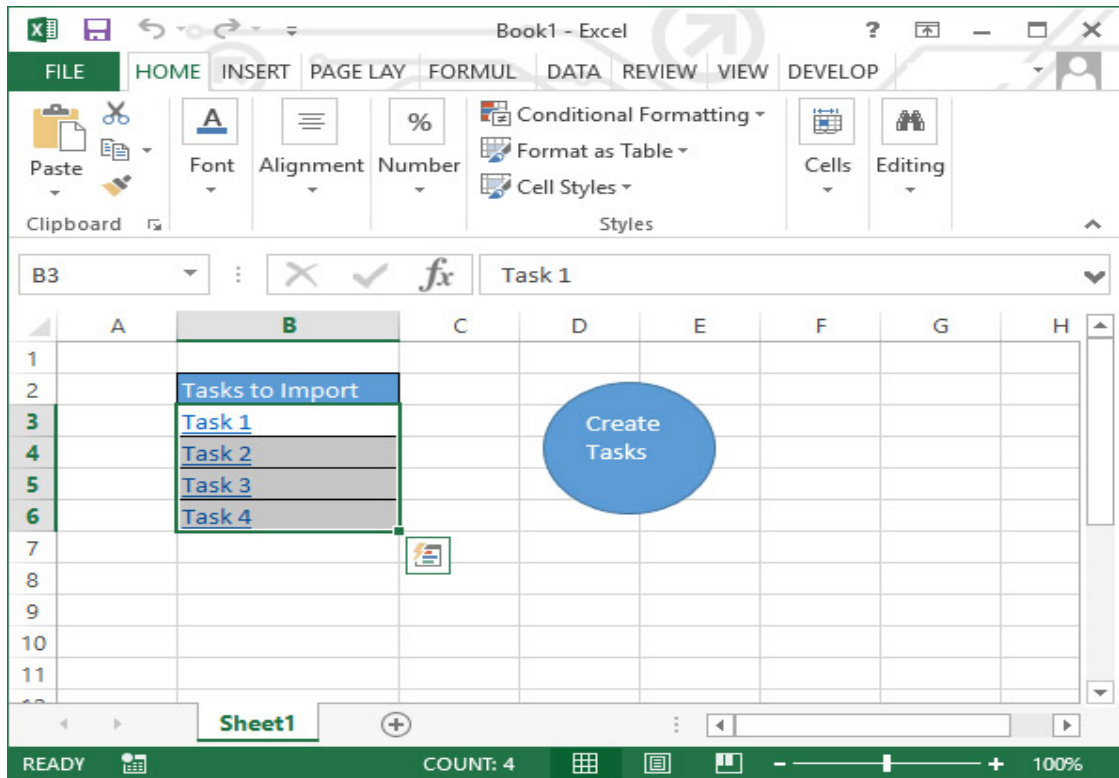


3. Using the Macro

- A) Select the Cells with the tasks you want to create.



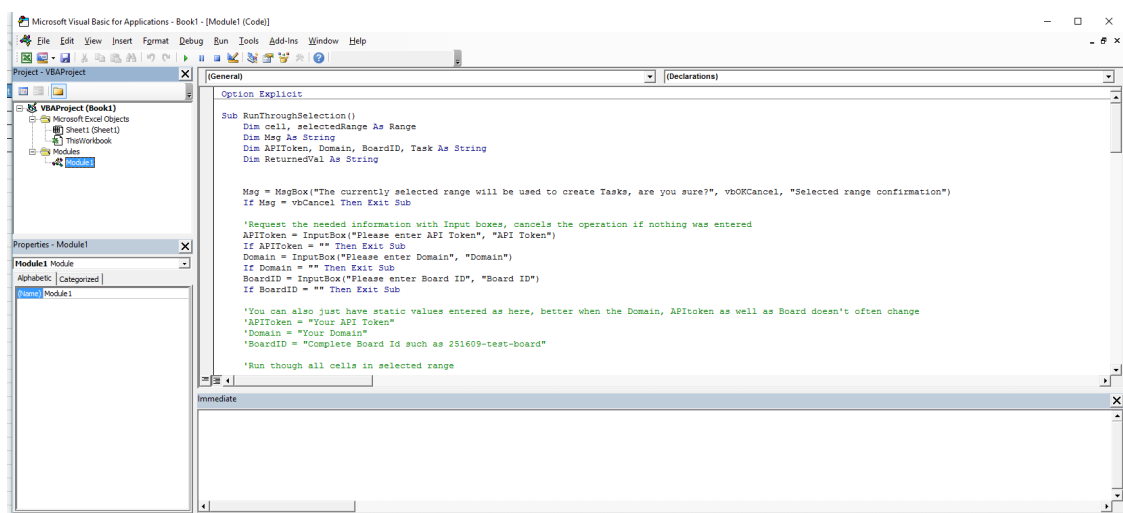
- B) Click on the button you created
- C) It will ask a confirmation to make sure that you have selected the cells you wanted. Click on OK
- D) Now enter the 'API Token', 'Domain' and 'Board ID' in the input boxes. These inputs won't change that much so you can enter these values directly into the code so that you don't have to enter them every time you want to run the code. See step by step guide below
- E) The code will run and create links for all the newly created tasks



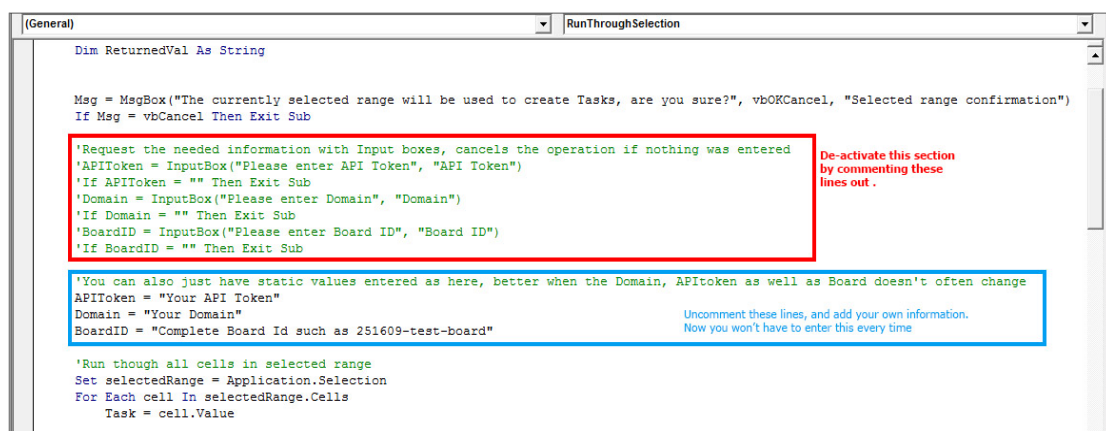
F) For any failed items (such as a blank cell), it will create a comment with the error code in it.

4. Editing the code to have the API Token, Domain and Board ID prepopulated

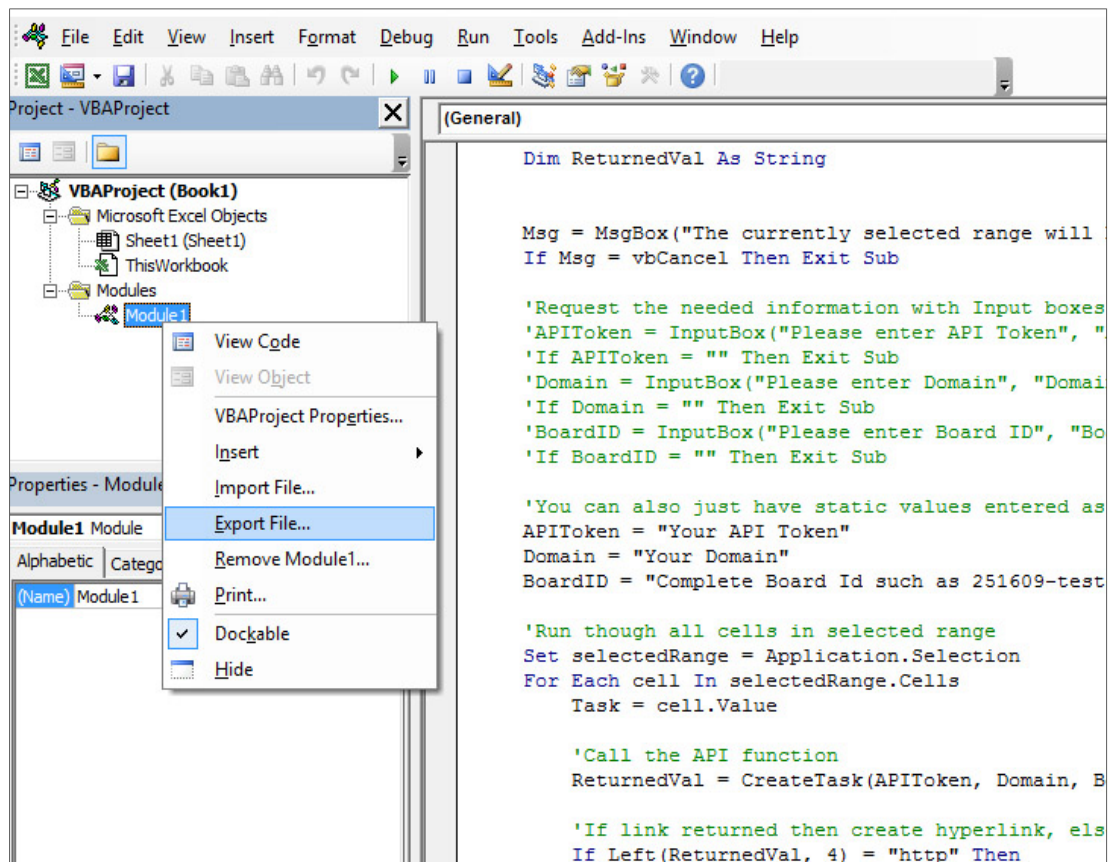
- A) Access the 'Visual Basic editor' either by pressing shortcut key ALT + F11, or choosing the 'Visual Basic' icon on the 'Developer' ribbon
- B) Double click on 'Module 1' to show code



- C) Uncomment this section and enter your own information. You can also comment out the code that asks for that information every time



- D) Save this updated code to be imported into other workbooks. Right click on 'Module 1' and select 'Export file'



E) Save it for future use. Just import the code and create a trigger on the next workbook.

In case of any questions, please contact us on support@kanbantool.com