

Technical Documentation

Reference : Plugin – Kanban

Version : V4.0

Plug-in Kanban

Introduction

The objective of this document is to explain how to use the plug-in "Kanban".

With this plug-in you can:

- ⇒ Create new Kanban board
- ⇒ Add / Remove columns to existing Kanban board
- ⇒ Use Kanban boards to manage Tickets or Activities or Requirements or Actions
- ⇒ Directly update item

Global structure of the plug-in

When the plug-in is installed, you get a new button, to access Kanban boards :



The access to the screen is managed like all other screens, through the "Access to forms" page. When plug-in is installed, only Admin profile is granted to access Kanban screen so you have to configure access rights corresponding to your needs.

The plug-in screen is divided in 2 parts:

- The Kanban boards configuration, on top



- The detail of the selected Kanban board just below, filling the screen



During first installation of the plug-in, a Kanban board is created for current user. It is a Kanban of Tickets where columns are Status based.

Open the Kanbans list to select the Kanban board you want to use.



Each time you access Kanban screen, the last selected Kanban board is displayed.

Management of Kanban boards

Create new Kanban board

Click on button « add a new Kanban »



will open a pop-up to enter the definition of the Kanban board

Dialog box titled "Add a new Kanban" with the following fields:

- name : [text input]
- type of item : Ticket [dropdown]
- type : status [dropdown]
- shared :

Buttons: Cancel, OK

You will need to define :

- **name** for the new Kanban board
- **type**: this will define on which field of ticket the columns of the Kanban board will act.

You can choose between:

- **status**: you will manage the most standard « status based » Kanban board
- **target product version**: you will be able to dispatch tickets amongst target product version
- **planning activity**: you will be able to dispatch Tickets amongst Planning Activities, that can be your Sprints in the Scrum method.
- **element type**: you can define a Kanban of Tickets or Activities or Requirements or Actions
- **shared** is a flag to indicate that you want to share this Kanban board with others so that they can use it.

Add columns to a Kanban board

By default, when you create a new Kanban board, it gets a single column. This one

- regroups all status for "status" based Kanban board
- is set to "undefined" for "target product version" and "planning activity" Kanban boards.

In the last case, the column contains Tickets that have no value for the corresponding field.

Click on button « add a new column »



will display pop-up to define the column

Dialog box titled "Add a new column" with the following fields:

- name : [text input]
- status : qualified [dropdown]

Buttons: Cancel, OK

You will have to define name for the column, and value of the corresponding field.

For « status » based Kanban boards name is mandatory. Column will contain Tiles with status from selected status to status just before (in status global ordering) the one of the following column. Only status existing in a workflow used for the class of items can be selected.

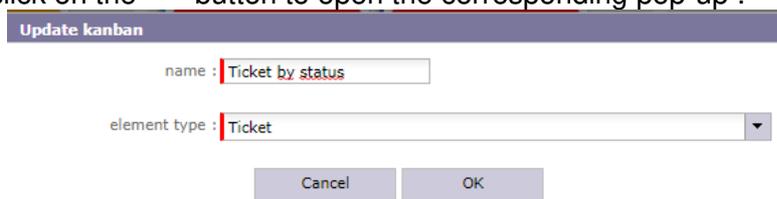
For "target product version" and "planning activity" based Kanban boards name is optional. If not defined, it will be set to the selected value. Column will contain Tickets which have selected value for the corresponding field.

Rename a Kanban board

Open the Kanban boards list



and click on the  button to open the corresponding pop-up :



Copy Kanban boards

Open the Kanban boards list



and click on the  button to directly copy the Kanban board into a brand new one. Name of copied Kanban board is set to « copied from XXX » where XXX is the name of the original copied Kanban board.

You can then easily rename the copied Kanban board (see above) or change its configuration independently to the original Kanban board.

Share Kanban boards

Open the Kanban boards list



and click on the  button to directly share the Kanban board with other users. Shared Kanban boards then appear with a green shared icon :



Access shared Kanban boards

Open the Kanban boards list



and click on the shared Kanban to view it.

You cannot configure a Kanban board shared by other users, but you can copy it () and then configure your own copy of the Kanban board.

Delete a Kanban board

Open the Kanban boards list

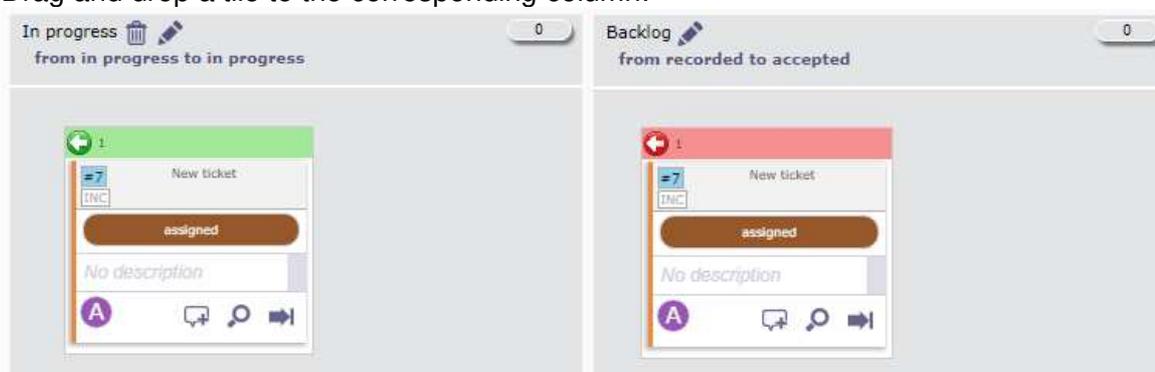


and click on the  button to directly delete the Kanban board (after confirmation).

Management of Tickets or Activities or Requirements or Actions through Kanban boards

Move tiles of Tickets or Activities or Requirements or Actions

Drag and drop a tile to the corresponding column:



Header of dragged tile is **Green** when it is over a column where move is allowed and is **red** when it is over a column where move is forbidden (see below “*forbidden moves*”).

For « status » based Kanban boards, new status will be the first status of the range defined for the column.

For “target product version” and “planning activity” based Kanban boards new value of the field will simply be the target one.

Forbidden moves

Moves will change the value of corresponding field for the Ticket or Activity or Requirement or Action.

So for “status” based Kanban board, “status” will try to be changed. But “status” change must respect the workflow configuration for the given item type. That’s why some moves are forbidden.

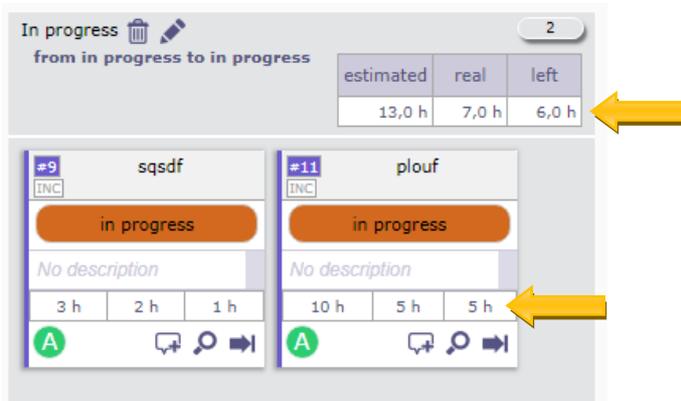
Allowed moves are easily identified from forbidden moves thanks to the header colour of the dragged tile.

Show work

You can choose to see work values on columns and on tile, using corresponding option :

see work on elements

This will display detail of “estimated / real / left” work on each Ticket or Activity and sum of “estimated / real / left” work for all Tickets or Activities in a column :



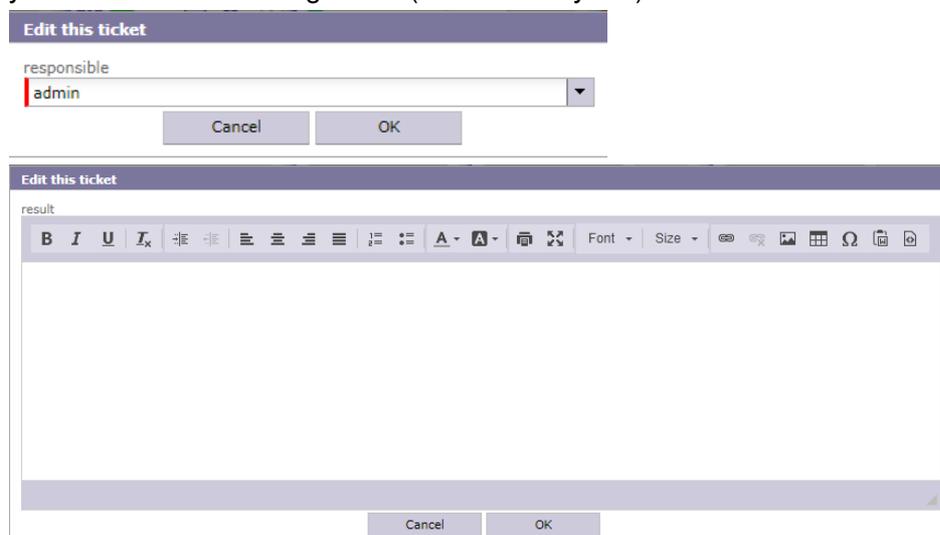
If your profile does not have rights to see work, you won’t have access to this option.

Format to display work (days or hours) depends on global configuration :

- “unit for real work allocation” for Tickets
- “unit for workload” for activities

Required updates

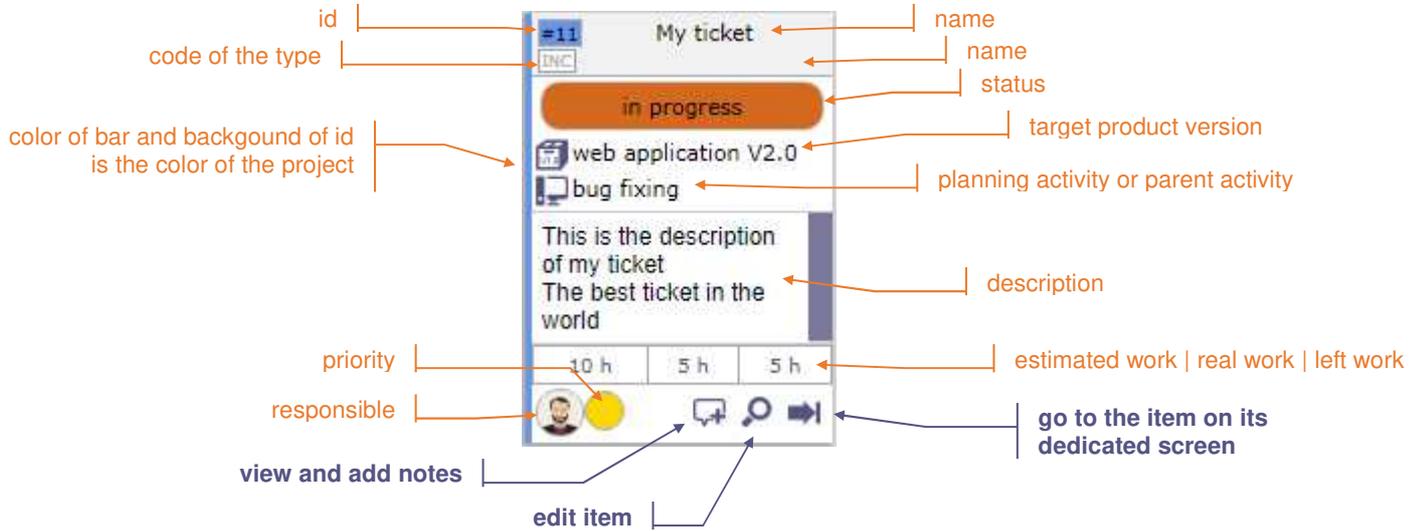
Depending on some configuration (depending on item type), some status change may require new fields to be set. For instance, in default configuration, when moving to “assigned” status, “responsible” is required, and when moving to “done” status, “result” is required”. In that cases, when moving a tile in the Kanban boards, a pop-up will appear to allow you to enter the missing value (if not already set):



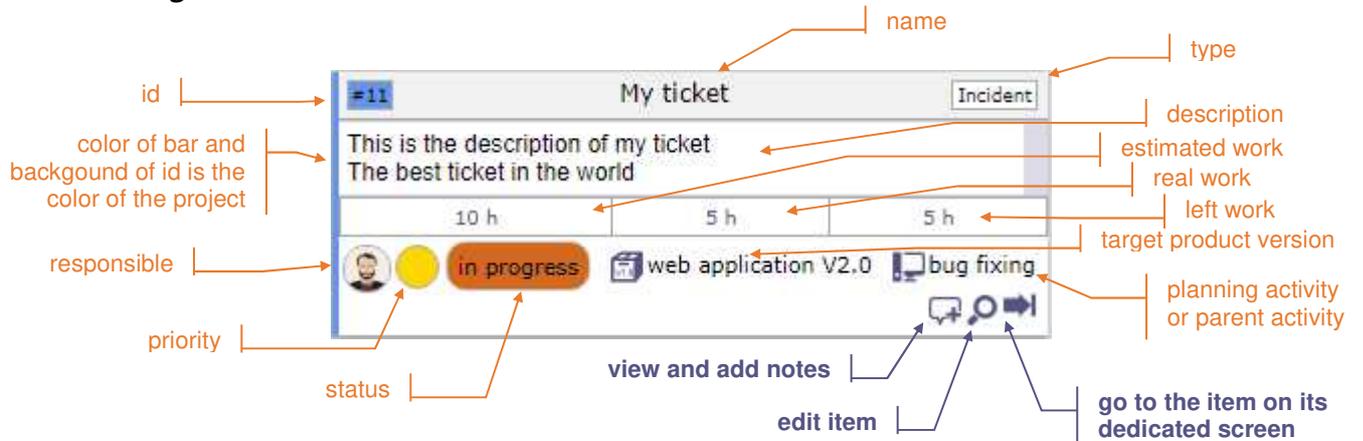
Description of Tile

Tile summarizes main information about the item.

Small tiles



Large tiles



History of changes

	V1.0
#2782 - Extending Kanban to activities	V2.0
#2783 - Implement CTRL + S on input pop-ups (result, resp.)	
#2784 - Implement filter management	
#2785 - Improved performance (resolved = data pb)	V2.1
#2786 - Add ShowWait on Adding Columns and Other Operations	V2.2
#2787 - Refresh list after filter is set	
#2788 - Improved performance if there are many projects	
#2789 - Improved performance if there are many activities	
#2790 - Problems with icons	V2.3
	V2.4
#2993 - KAnban : add notes => Error	V3.0
#3010 - refresh list kanban	
	V3.1
#3061 - Kanban : Selected project is not taken into account	V3.2
#3075 - Kanban : icon to add requirement in standart theme is flat green	
#2421 - Kanban : Sometimes, updates from KAnban viewx are not taken into account	V3.3
#2700 - Kanban based on activities, estimate, real and left work are not set.	
#2793 - Give the ability to add and see notes from Kanban	
#2859 - Refresh Kanban when selecting project	
#2994 - Kanban : impossible to move tile	
#3065 - Kanban : not possible to add note	V3.4
#2791 - Bug: on change, filter loss (on the manager, status, version)	V3.5
#2792 - Provide access to an item (not just pop-up)	
#2795 - Proposing "wide"	
#2796 - Improve reactivity (avoid screen refreshes)	
#2799 - Kanban for Requirements	
#2984 - Kanban : for kanban of tickets based on planning activity, show work on activity	
#3021 - Requirement Kanban	
#3107 - Kanban : error when moving items on Kanban Tickets by Versions	
#3121 - Kanban : cannot move items in full width	
#3127 - Kanban : move tile from recorded to Assigned, icon of responsible is incorrect	
#3138 - Kanban : error when I drop activity from finished to closed	
#3184 - Kanban : list of products not restricted corresponding to User rights	
#2798 - Power to edit online	V3.6
#3258 - Kanban : move to status done, resolution not set	
#3366 - Kanban : caption of some icones (missing)	
#3367 - Kanban : on small format, Status may be hidden by title	
#3368 - Kanban : display of full description, line breaks are lost	
#3369 - Kanban : remove rounded border (no use)	
#3372 - Kanban : issue if note contains html characters	
#3671 - Kanban : change filter => Error on V7.2	
#3718 - Kanban Issue	
#2794 - Kanban : Show the item type on the form	V4.0
#2857 - Kanban of Actions	
#3210 - Kanban : set top smaller and fix Title of cols	
#3220 - Kanban : allow to move to column if one of the statuses is allowed	
#3371 - Kanban : Keep header of columns always visible	