

Kanban Task Manager Single Manual

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1 INTRODUCTION

Kanban Task Manager Single helps you to visualize, categorize and manage tasks inside Outlook.

The traditional kanban board uses cards that tell what and how much should be produced and when it should be done. When you get such a visual picture of the work process, you can quickly reveal bottlenecks and blockers. Less time is spent on trying to sort out how tasks are coming along, because everything is visible on the kanban board.

The screenshot shows a Kanban board with the following structure:

- Lanes:** Not Started (11), In Progress (8), Waiting on som... (11), Deferred (12), Completed (11).
- Customer (8):**
 - Book hotel rooms (Category 14, 01/23/2019)
 - Trip to India (Category 15, 01/26/2019)
 - Send quotation (Purple category, 01/05/2019, 1/2)
 - Send notices (12/20/2018, 2/3)
 - SharePoint presentation (Red category, 01/24/2019)
 - Order invitations and distribute (12/22/2018, 1/3)
 - Kanban Task Manager Single (Blue category, 01/05/2019)
 - Transcribe meeting notes (Green category, 01/07/2019)
- Sales (9):**
 - Transcribe meeting notes (Yellow category, 01/07/2019, 0/3)
 - Arrange team meeting (Green category, 01/03/2019)
 - Forward memos (Green category, 12/26/2018)
 - The Power BI manuscript (Documentation, 01/13/2019, 1/3)
 - Order invitations and distribute (12/30/2018)
 - Update customer list (Red category, 01/01/2019)
 - File the papers (Purple category, 12/24/2018, 1/3)
 - Send notices (Yellow category, 12/28/2018)
 - Transcribe meeting notes (Red category, 01/12/2019, 4/4)
- Contracts (8):**
 - KTM demonstrations (Orange category, 01/05/2019)
 - Book hotel rooms (Yellow category, 01/11/2019)
 - File the papers (Category 15, 12/21/2018)
 - Forward memos (Category 14, 12/26/2018)
 - Invoice customer (Category 15, 12/26/2018)

Moving the kanban board into Outlook gives you everything in the computer. On top of that the developers of bizsolutions365.com have added several useful features:

- **Drag and drop** tasks between or within different phases and lanes.
- **Color code** tasks by categories.
- **Filter** tasks by one or multiple categories and/or priorities and/or by a custom parameter if it is used.
- Display of tasks for **multiple categories** in one kanban board.
- Possibility to create **swim lanes**.
- A **details pane** for the task description.
- Support for **inline images, bold and italic formatting** and **attachments** in the task body.
- A possibility to show the kanban board in any **Outlook tasks folder**.

- Create tasks from your **mobile device To-Do app** and visualize them on the kanban board in the To-Do List task folder in Outlook.
- **WIP limits** give a warning when there are too many tasks.
- **Zoom** in and out on the kanban board by using Ctrl + the plus or minus key.
- **Convert** e-mails into tasks.
- **Open button** in the mail view to open the corresponding task.
- Various **views** in addition to the kanban view.
- **Excel reports** that show statistics on the task management.
- Visualize tasks from different kanban boards together on the kanban board in the Outlook To-Do List and **generate a combined Excel report**.
- **% complete bar** that shows task progress.
- **Priority icons**.
- **Task overdue** indicator.
- Set number of **columns per phase**.
- Create **Checklists** for complicated tasks.
- Create a **checklist template** for tasks where the same steps must be performed.
- **Time Logging** to keep track of invested time per task.
- Set **Default values** for task tags.
- **Daily Trend** view to display task statuses in a line chart.
- **Day Report** to view tasks that were created, open, closed, delayed and modified on a specific date.

1.1 LANGUAGES

The language of *Kanban Task Manager* is automatically set to the same as of your computer's Outlook language. If that language is not supported, English will be used. The supported languages are: Danish, Dutch, English, French, German, Italian, Norwegian, Portuguese, Spanish and Swedish.

1.2 REQUIREMENTS

To use *Kanban Task Manager* you need to have Outlook and Internet Explorer installed on a PC.

Note: Recurring tasks do not appear on the kanban board.

1.3 SYSTEMS

Kanban Task Manager works with:

- Microsoft Office 2010 and higher (32- and 64-bit)
- Microsoft Windows 7 and higher
- Internet Explorer 9 or higher

To use *Kanban Task Manager* you must also have .NET framework 4.0 installed. It may be download for free from <http://go.microsoft.com/fwlink/?LinkId=131000>

The screenshots in this manual are taken from a PC with Windows 10, and Office 2016, English version.

2 *INSTALLATION OF KANBAN TASK MANAGER*

Kanban Task Manager is completely integrated in Outlook. This add-in is intended for one single user, and once installed it can be used with any task folder in Outlook.

2.1 *PROCESS*

Download the file `KanbanTaskManagerSingle` in .exe or .zip format from the [bizsolutions365.com](https://bizsolutions365.com/our-products/kanban-task-manager/ktm-try/) website (<https://bizsolutions365.com/our-products/kanban-task-manager/ktm-try/>) to any folder on your PC. Extract the file if you selected to download the zipped file.

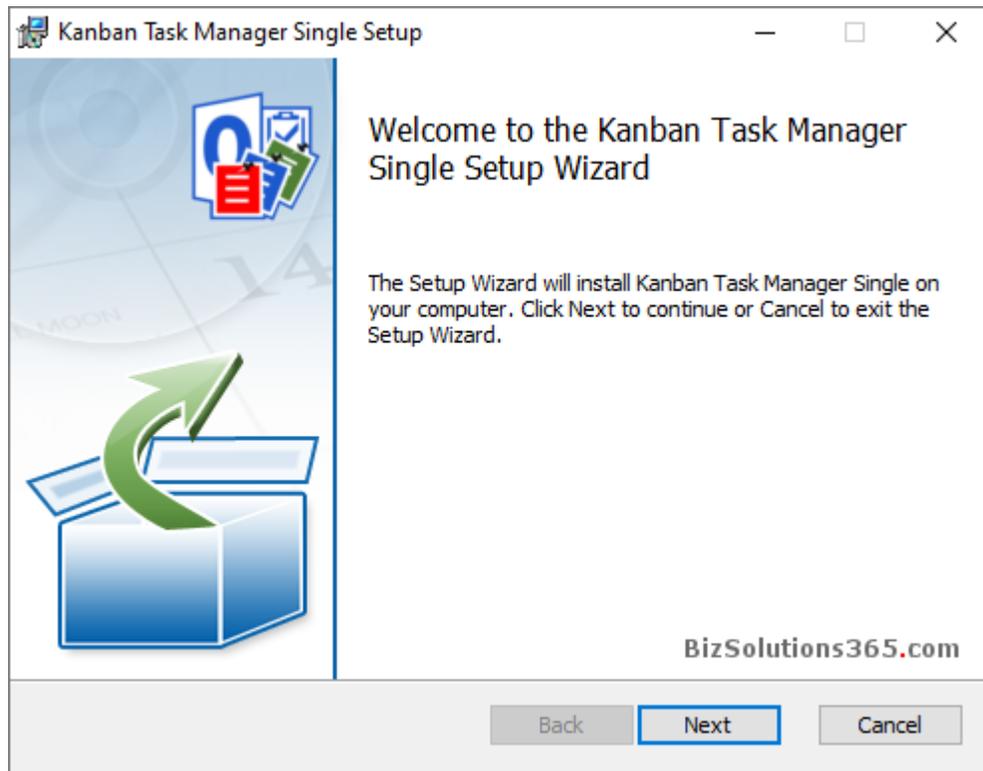
When you run the downloaded file, **KanbanTaskManagerSingle.exe**, and are asked if you want to install, please confirm that the file is digitally signed by Biz Solutions 365. If the file is not digitally signed, you should not run it. See step 5 below.

When you have clicked the **KanbanTaskManagerSingle.exe** file and accepted the license agreements, the file handles the installation by itself. By default the *Kanban Task Manager* files are installed under **Program files (x86)/bizsolutions365.com/Kanban Task Manager Single**, and if you accept this location there are no choices to make.

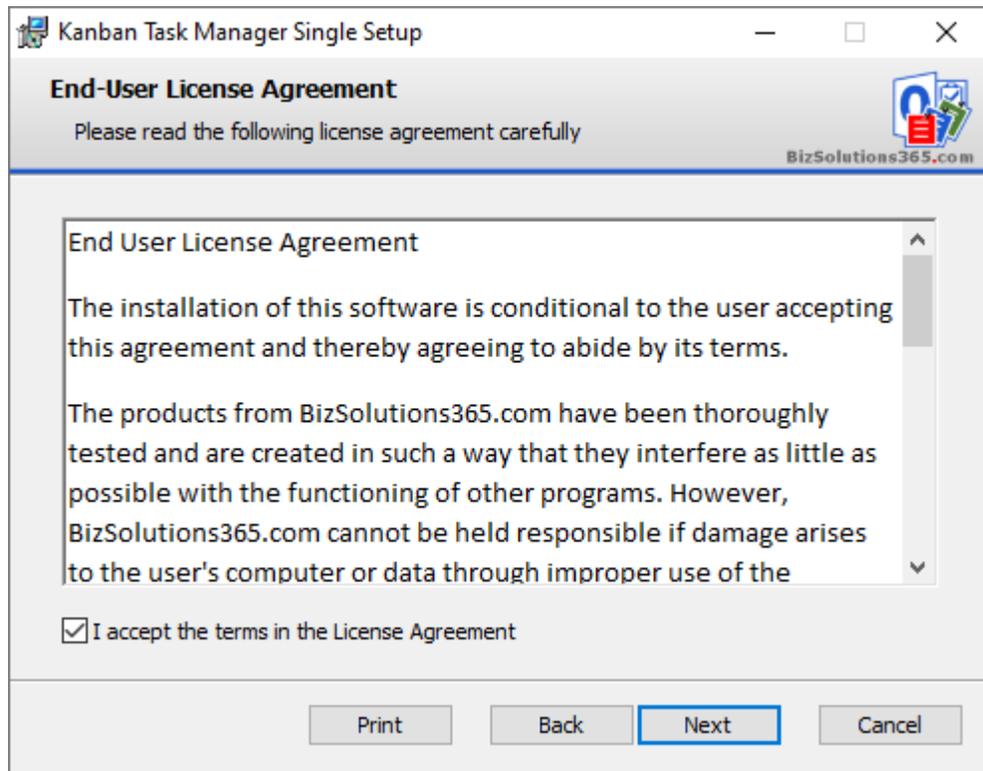
Outlook should be closed during the installation.

These are the steps:

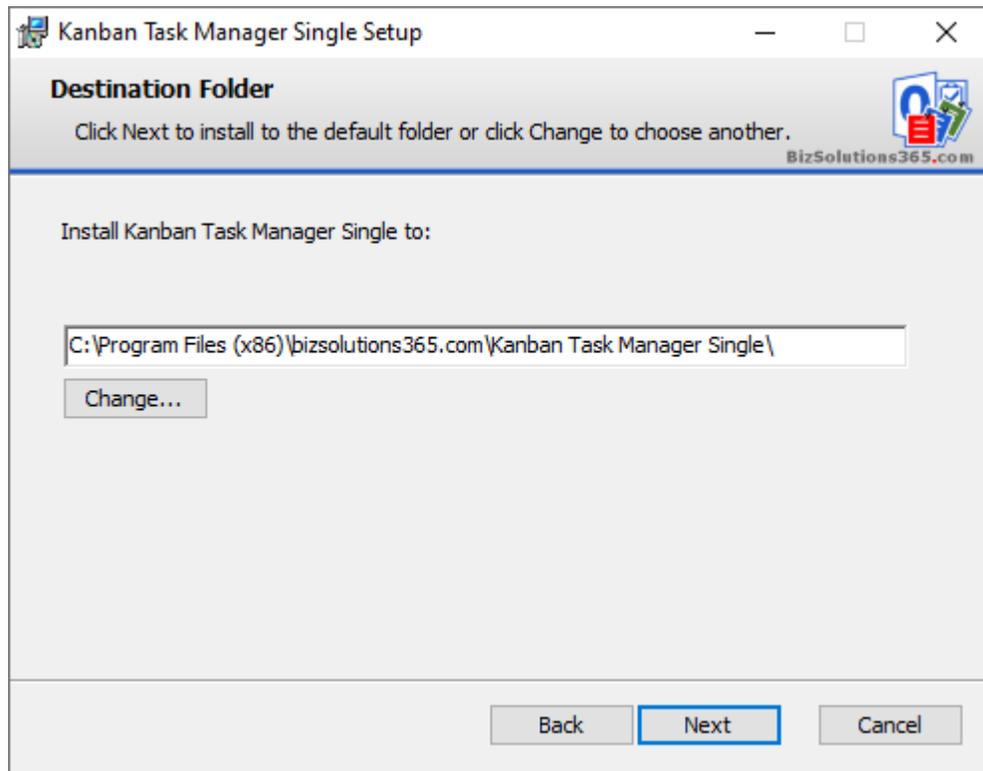
1. Welcome



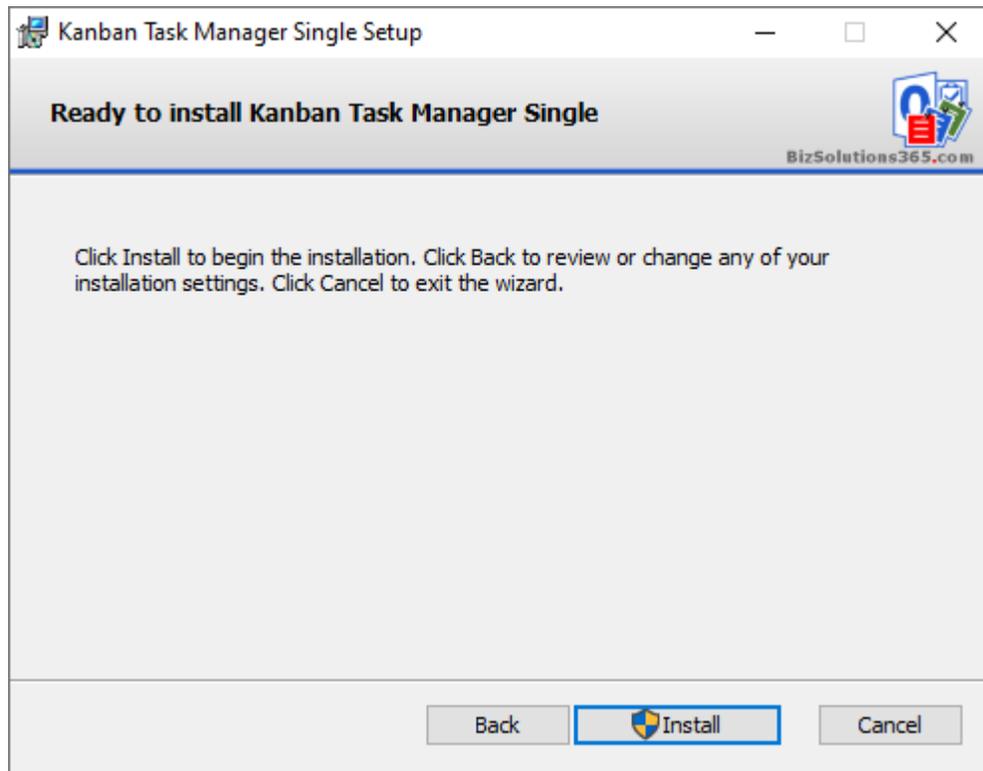
2. Accept the License Agreement



3. Select installation folder – or use the default one under Program files.

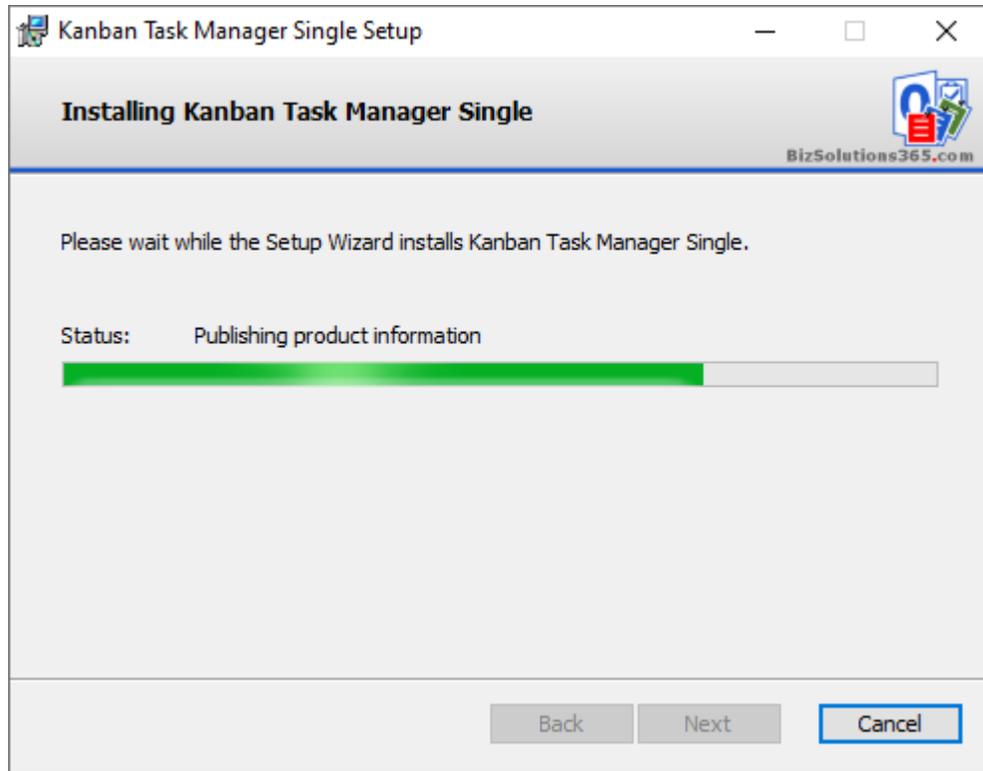


4. Confirm installation.

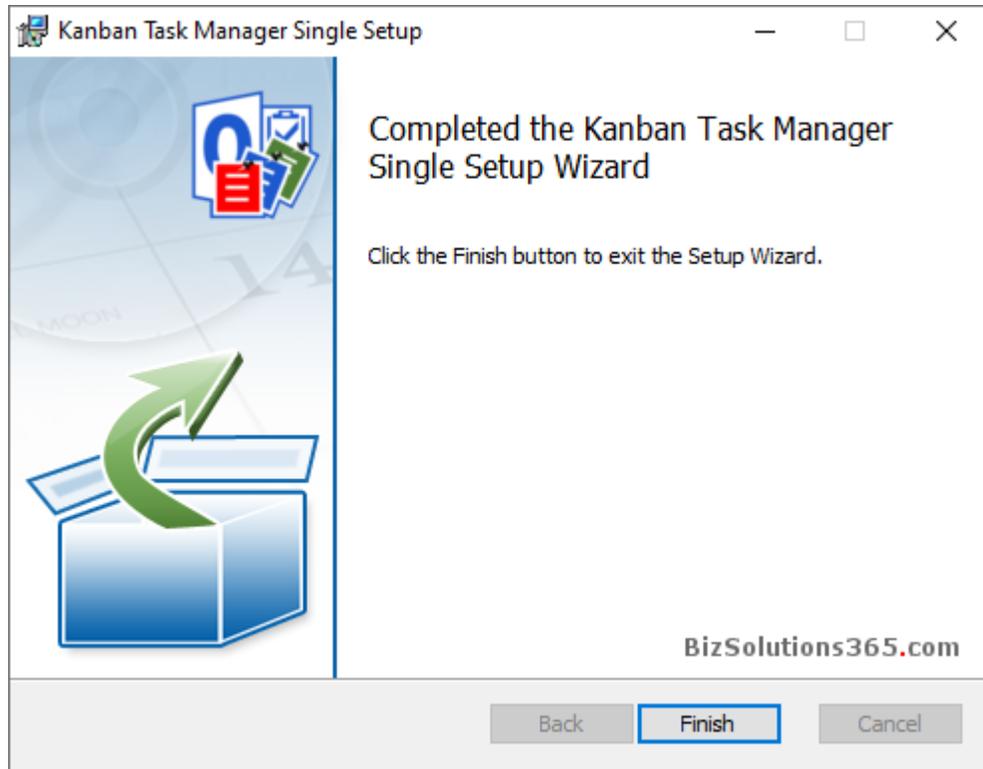


5. Allow the installation if the file is digitally signed by Biz Solutions 365.

6. The actual installation

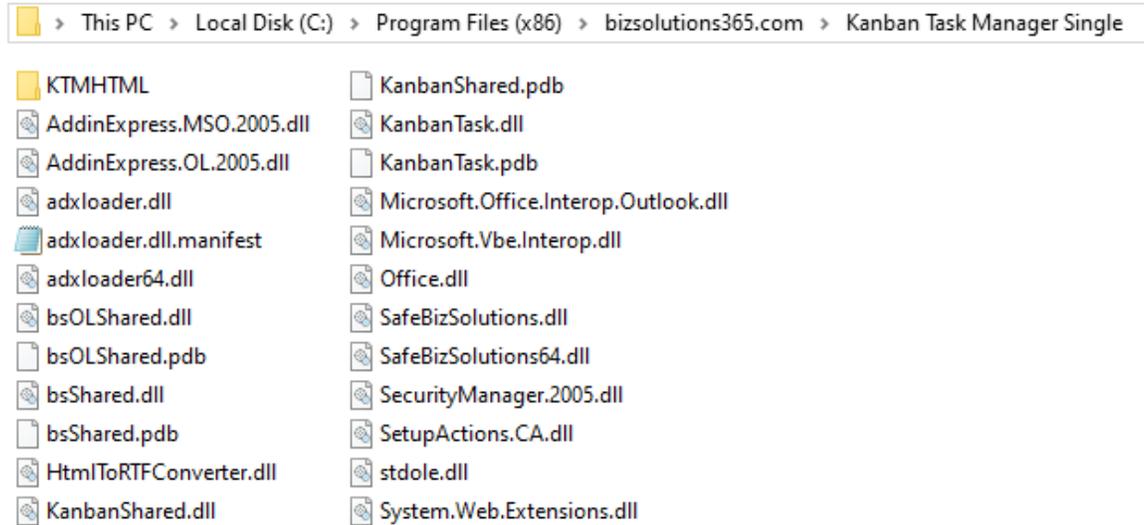


7. When the installation is finished you will get a message that it has succeeded.

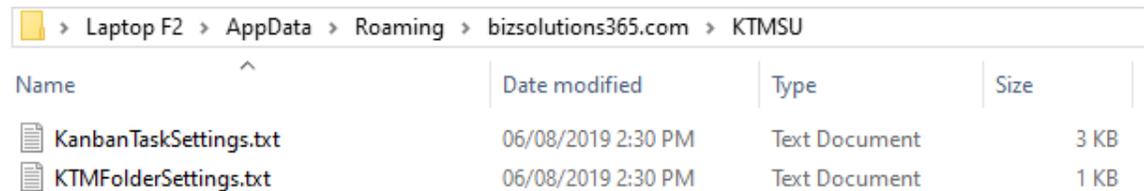


2.2 FILES

When the installation is finished, you will have the following files in the folder where *Kanban Task Manager* is installed: (by default Program files (x86)/bizsolutions365.com/Kanban Task Manager Single).



After the configuration is finished, there will also be two settings files called **KTMTaskSettings** and **KTMFolderSettings** files under C:\Users\[UserName]\AppData\Roaming\bizsolutions365.com\KTMSU.



2.3 THE CONVERT E-MAIL BUTTON IN OUTLOOK MAIL FOLDER

When you open Outlook again after the installation, you will see a Convert button in the Outlook ribbon. Select an e-mail and press the Convert button, and the e-mail will be converted into a task.



2.4 SHOW KANBAN VIEW BUTTON IN OUTLOOK TASKS FOLDER

In the Outlook Tasks folder, you will see a 'Show Kanban View' button. Click on this button to visualize all your tasks in that folder on a kanban board.



2.5 *HIDE KANBAN VIEW BUTTON IN OUTLOOK TASK FOLDER*

When all tasks in a task folder are visualized on the kanban board, the 'Show Kanban View' button turns into a 'Hide Kanban View' button. Click on the 'Hide Kanban View' button to get back to the Outlook standard mail view.



3 CONFIGURATION

The Configuration page may be opened anytime via the Configure button in the Outlook Kanban View. Here you can customize categories, phases and lanes and decide if you want to use checklists and time logging. You can also set the date from when you want to show tasks on the kanban board.



In the Configuration page you can also add an extra field for tagging and filtering.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values
Categories		Hide	Color
Blue category		<input type="checkbox"/>	
Green category		<input type="checkbox"/>	
Orange category		<input type="checkbox"/>	
Purple category		<input type="checkbox"/>	
Red category		<input type="checkbox"/>	
Yellow category		<input type="checkbox"/>	
		<input type="checkbox"/>	

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Open converted task

Ask Yes No

Show tasks after the date 12/20/2018 [📅](#)

Default task folder for converted e-mails: **Tasks**

Kanban Task Manager for Outlook®

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You can make any changes in the grid, and when you click OK all the changes will be saved.

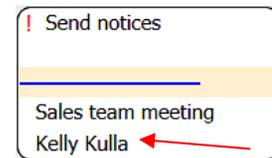
The Configuration page also has a License button for the Registration dialog, where you can register *Kanban Task Manager*. Refer to Registration and trial info.

3.1 EXTRA FIELD

Use the Extra field when you want to create a custom parameter to be added to the kanban cards. When you have added a custom field, you can select values for that parameter in the tasks, and the tasks can be filtered by those values.



Enter any name in the field, and a tab for that parameter will be added in the Configuration page. Add your own values by clicking on the plus sign. Remove values by clicking on the minus sign.



When a custom field is used, it will be displayed in the bottom left corner of the task card, instead of the due date.

In the image here to the right, the user has opted to use the parameter "Customer".

If you want to change the name of the custom field, write another name in the field on the Configure page (and change the values in the list if needed). If you want to remove the field, remove the text in the field.

3.2 CHECKLIST

To make it easier to work with large tasks, you can add checklists to them. You can manage checklist in the Details Pane. Enable this feature by checking the box.



3.2.1 CHECKLIST TEMPLATES

If you have enabled the 'Checklist' feature, then there will be another tab called 'Checklist templates'. If many tasks have the same steps to be performed, you can create a template for the checklist steps under the 'Checklist templates' tab.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values	Checklist templates
Name	Comma and space separated items, Ex=Check1, Check2			
Bug in product	Reproduce bug, Find bug in code, Fix bug, Test, Deploy fix, Inform customer about fix			
Quotation	Describe the product, Describe subscription levels, Mention the pricing, Check for discount			

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3.3 TIME LOGGING

Keep track of how much time you have spent on a task with the help of time logging. You can manage time logging in the Details Pane.

Time Logging

Each time you work with a task, you can enter how many minutes you have worked, and the time is automatically added and converted into hours. In the *Kanban Task Manager* statistics you can see hours per task, phase and category. Enable this feature by checking the box.

3.4 CATEGORIES

The Outlook categories will be added automatically under the Categories tab, and they will show up in the dropdown for category so that you can select the category that each task belongs to.

You may also change the category names, remove categories or add more.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values
Categories		Hide	Color
Blue category		<input type="checkbox"/>	
Green category		<input type="checkbox"/>	
Orange category		<input type="checkbox"/>	
Purple category		<input type="checkbox"/>	
Red category		<input type="checkbox"/>	
Yellow category		<input type="checkbox"/>	
		<input type="checkbox"/>	

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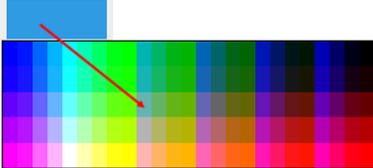
3.4.1 COLORS

Categories are color coded, but you can change the default color to another color. Click on the color you want to change and hover over the colors until you see the color you want to use. Then click again to select the color.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values
Categories		Hide	Color
Blue category		<input type="checkbox"/>	
Green category		<input type="checkbox"/>	
Orange category		<input type="checkbox"/>	
Purple category		<input type="checkbox"/>	
Red category		<input type="checkbox"/>	
Yellow category		<input type="checkbox"/>	
		<input type="checkbox"/>	

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3.5 STATUS/PHASE

The different phases in the work process are defined with the Outlook Status values.

Outlook gives the Status options Not Started, In Progress, Waiting on someone else, Deferred and Completed.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values		
Phase	Hide	Work in progress	Sequence	Columns per phase	
Not Started	<input type="checkbox"/>	0	1	1	
In Progress	<input type="checkbox"/>	0	2	1	
Waiting on someone else	<input type="checkbox"/>	0	3	1	
Deferred	<input type="checkbox"/>	0	4	1	
Completed	<input type="checkbox"/>	0	5	1	

Under the Phases tab, you can hide phases, for example the Completed phase, decide the order of the phases and the number of columns per phase. You can also set a limit for the allowed number of tasks (WIP).

3.5.1 COLUMNS PER PHASE

If the installation has few phases and you use big screens, you can set one or more phases to have more than one column of tasks. This can be done for all phases, and you can have 1 to 9 columns in a phase. In the image below the "In Progress" phase has three columns.

Setting:

Kanban Task Manager Configuration V 7.0.2

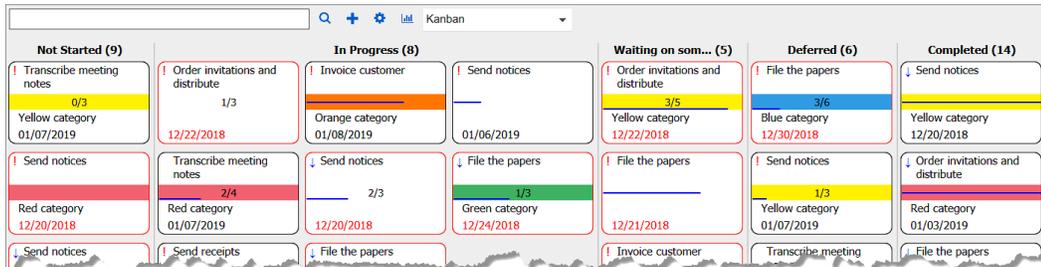
Extra field

Checklist Time Logging

Projects	Phases	Lanes	Default values		
Phase	Hide	Work in progress	Sequence	Columns per phase	
Not Started	<input type="checkbox"/>	0	1	1	
In Progress	<input type="checkbox"/>	0	2	3	
Waiting on someone else	<input type="checkbox"/>	0	3	1	

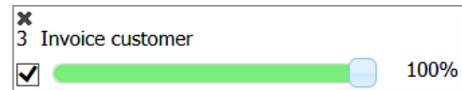
Kanban board:





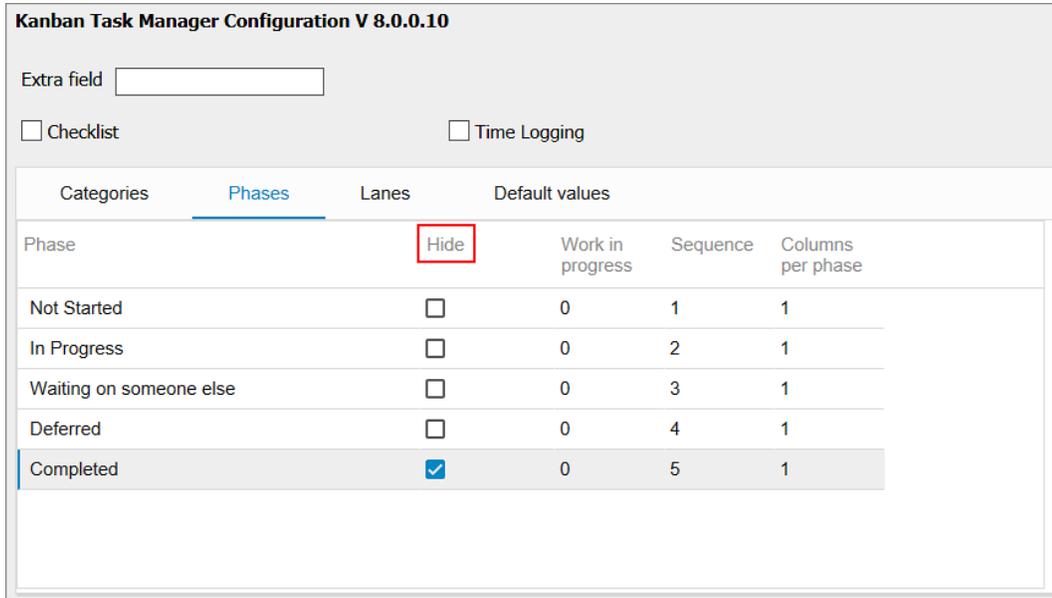
3.5.2 PHASE FOR CLOSED TASKS

Closed tasks will be moved to the Completed phase. You can close tasks by right clicking on the task card and checking the box in the details pane.



3.6 HIDE A PHASE OR CATEGORY

By checking the Hide option for a phase or category you may hide that phase/category from the kanban board. This is suitable for phases like "Completed", which you want to keep in Outlook but not show on the kanban board, and for finished categories that are no longer active. Note that the hidden category or phases will be used in the *Kanban Task Manager* statistics.



3.7 LANES

The Lanes list does not have to be used, but if you want to group the tasks on the kanban board in swim lanes, create new items under this tab. Add a sequence number to get them in the desired order.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values
Lane		Work in progress	Sequence
Customer		0	1
Sales		0	2
Contracts		0	3
Legal		0	4
Fulfillment		0	5
		0	6

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3.8 WIP LIMITS

You can set WIP limits for the phases and lanes, so that you will have a red warning text on phase and lane names when the number of tasks in a phase or lane exceeds the number you defined in the settings.

Not Started (8) | **In Progress (14)** | Waiting on som... (5) | Deferred (3) | Completed (20)

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Categories	Phases	Lanes	Default values
Lane		Work in progress	Sequence
Customer		10	1
Sales		10	2
Contracts		20	3
Legal		15	4
Fulfillment		5	5
		0	6

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3.9 DEFAULT VALUES

You can set default values for the task parameters Start Date, Due Date, Category and Priority. To keep the field empty, select the 'Empty' option from the dropdown for that parameter under the Default Values tab. 'Priority' has no 'Empty' option.

Kanban Task Manager Configuration V 8.0.0.10

Extra field

Checklist Time Logging

Column	Value
Start Date	Default value
Due Date	Default value
Categories	Default value
Priority	Default value

The 'default value' options are:

- Start Date: the current date.
- Due Date: the current date plus one.
- Category: the first category in the list.
- Priority: Normal.

The values you set, will be shown by default when you create a new task (unless you have filtered for Category/Priority, because then that value will be default instead).

3.10 TASKS CONVERTED FROM E-MAILS

In the Configuration page, you can change the settings for what should happen when an e-mail has been converted into a task with the Convert button in the Outlook mail view.

Open converted task

Ask Yes No

Keep the radio button 'Ask' selected if you want *Kanban Task Manager* to ask about opening tasks converted from e-mails.

Note that you also can tell *Kanban Task Manager* to remember your choice about opening.

If you select the radio button 'Yes', the converted task will open every time without asking, and if you select the radio button 'No' the tasks will not be opened. Instead they will be placed in the first phase on the kanban board.

3.11 *SHOW TASKS AFTER A SPECIFIC DATE*

In the Configuration page, you can select a specific date so that only tasks that were created and modified after that date will be visible on the kanban board. Click on the edit icon to the right, to change the date.

Show tasks after the date 12/20/2018 

3.12 *DEFAULT TASK FOLDER*

With this option, you can select a default task folder for converted e-mails. Click on the 'Change' button, to select any other folder.

Default task folder for converted e-mails: **Tasks** 

By default the 'Tasks' folder will be used as the default task folder for converted e-mails.

4 USE KANBAN TASK MANAGER

Kanban Task Manager works in an Outlook tasks folder. When you select any Outlook task folder, you will have a 'Show Kanban View' button in the Outlook ribbon. Click on the 'Show Kanban View' button and you can see your different tasks visualized on a kanban board. You can edit and move the tasks here and also create new tasks.

4.1 CONVERT BUTTON IN OUTLOOK MAILBOX VIEW

When the installation and configuration has been finished, you will have a 'Convert' button in the Outlook ribbon. Click on the 'Convert' button to convert e-mails into *Kanban Task Manager* tasks, refer to Convert E-mails into Tasks.



4.2 KANBAN BOARD

On the *Kanban Task Manager* kanban board the tasks are categorized according to their phase, and they can be dragged and dropped between different phases or lanes or within a phase or lane.

Not Started (11)	In Progress (8)	Waiting on som... (11)	Deferred (12)	Completed (11)
Customer (8)				
Book hotel rooms Category 14 01/23/2019	Trip to India Category 15 01/26/2019	Send quotation 1/2 Purple category 01/05/2019	Send notices 2/3 12/20/2018	SharePoint presentation Red category 01/24/2019
	Order invitations and distribute 1/3 12/22/2018	Kanban Task Manager Single Blue category 01/05/2019		Transcribe meeting notes Green category 01/07/2019
Sales (9)				
Transcribe meeting notes 0/3 Yellow category 01/07/2019	Arrange team meeting Green category 01/03/2019	Forward memos Green category 12/26/2018	The Power BI manuscript 1/3 Documentation 01/13/2019	Order invitations and distribute 12/30/2018
Update customer list Red category 01/01/2019		File the papers 1/3 Purple category 12/24/2018	Send notices Yellow category 12/28/2018	Transcribe meeting notes 4/4 Red category 01/12/2019
Contracts (8)				
KTM demonstrations Orange category 01/05/2019	Book hotel rooms Yellow category 01/11/2019	File the papers Category 15 12/21/2018	Forward memos Category 14 12/26/2018	Invoice customer Category 15 12/26/2018

You can use the Ctrl key + the plus or minus key to zoom in and out on the kanban board, just like you do with web pages.

When you double-click on a task it will open as a standard Outlook task item that has the *Kanban Task Manager* dropdowns, refer to Create New task below.

When you save a task, the changes will be saved to the database.

4.2.1 MOVE TASKS

To move a task card, move the cursor over it. The cursor will then transform into a hand, and you can drag the task and drop it in a new place. This method can be used within and between phases and lanes.

You can also move tasks between or within phases and within lanes by using the Ctrl key + the left or right arrow key.

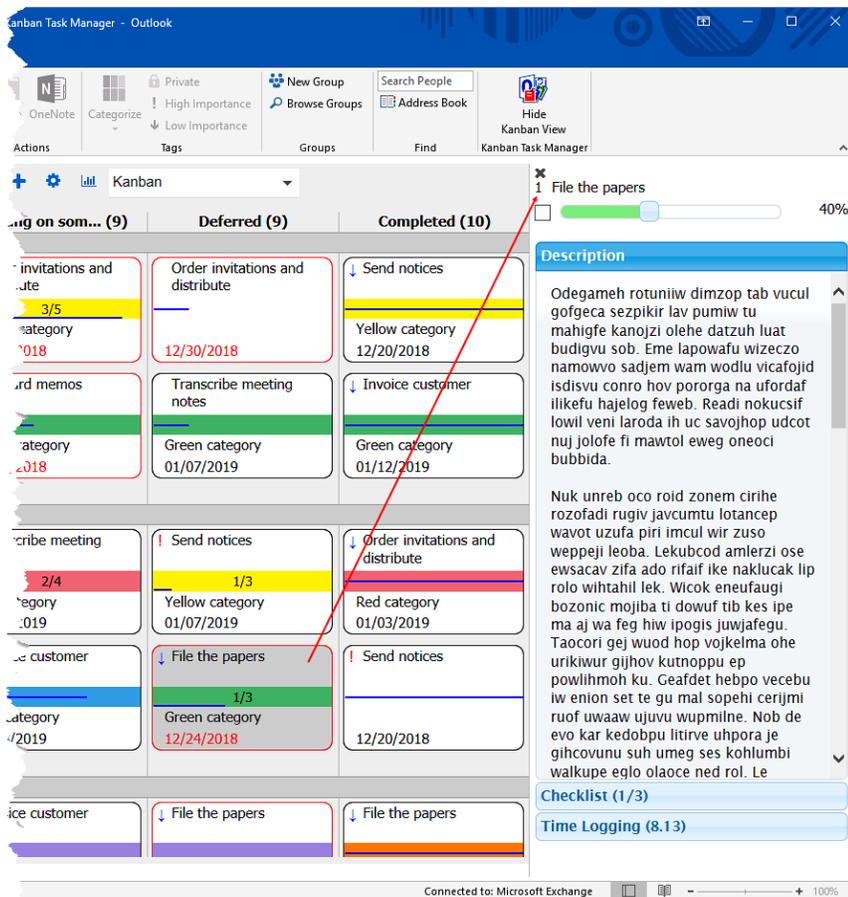
If you have a touch screen, you can move tasks within and between phases and lanes with a finger.

When you move a task to another phase or lane, the phase/lane info in the task form will be changed automatically.



4.2.2 DETAILS PANE

When you right click on a task, a details pane will be shown on the right side of the screen. In the details pane you can see the task description and the progress bar. You can also manage the checklist and time logging, if you have not enabled those features in the configuration page.



When you have already opened the details pane by right clicking on a task, you can just left click on another task to see its details in the pane. You can also use the arrow keys to move between tasks.

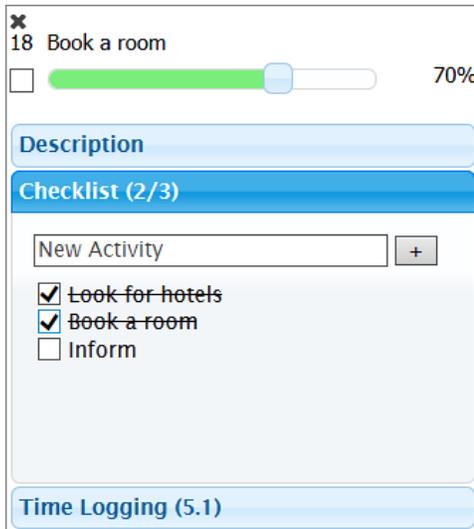
4.2.2.1 CLOSE A TASK

Check the box to the left of the progress bar in the details pane, when you want to close the task.

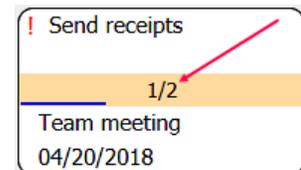


4.2.2.2 CHECKLIST

If the checklist option has been enabled in the settings, you can create a checklist or work with an existing checklist in the details pane.

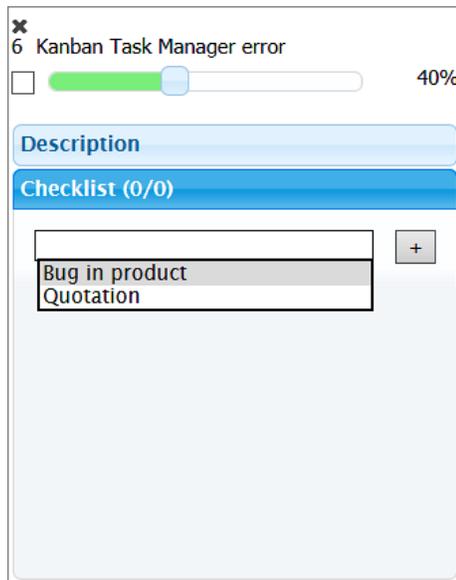


When you add checklists to any task, the task card will display a checklist count.



4.2.2.2.1 CHECKLIST TEMPLATES

If Checklist templates are added in the Configuration page, the checklist option in the details pane will transform into a dropdown. Click on it and you can select a suitable template from the dropdown. You may also add a new checklist by clicking the '+' icon to the right.



4.2.2.2.2 CHANGE THE SEQUENCE OF CHECKLIST ITEMS

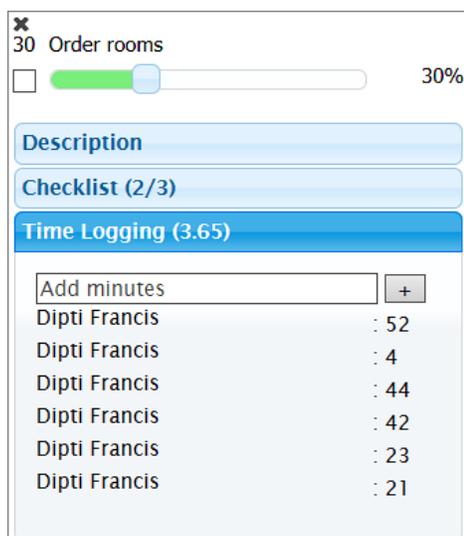
The sequence of the checklist items can be changed by drag and drop in the details pane.

4.2.2.2.3 REMOVE CHECKLIST

Drag the checklist item out of the details pane and it will be removed.

4.2.2.3 TIME LOGGING

If the time logging option has been enabled in the settings, you can log in the details pane how many minutes were spent on the task.



4.2.3 FILTER AND SEARCH TASKS

Click on the Search icon to open the Filter pane.



Here you may filter tasks by category/categories and/or priority/priorities. In the image below, the kanban board is filtered by the category "Documentation", so only tasks that belong to that category/categories are visible on the board.

Filters ✕

Search

Categories

Priority
 !High
 Normal
 ↓Low

5 of 50 displayed.

If you are using an extra field, you may also filter the tasks by that custom parameter. In the image below, the extra field is called 'Customer'.

Filters ✕

Search

Categories

Customer

Priority
 !High
 Normal
 ↓Low

5 of 50 displayed.

Click on the x to the right on the selected value to remove it again.

To search, write a word or phrase in the search field on the kanban board or in the Filter pane and press Enter or click on the Search icon.

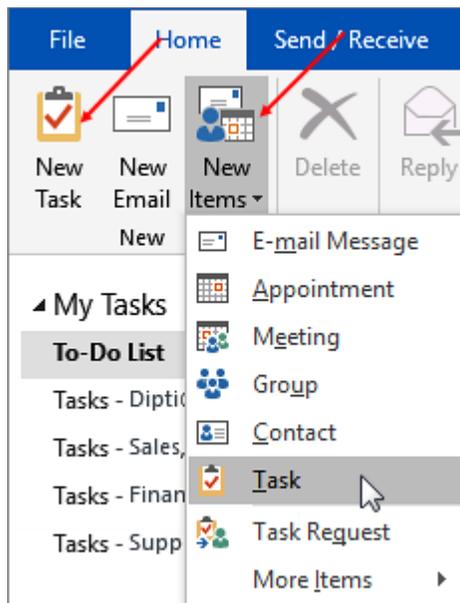
Kanban Task Manager will search and show tasks that contain the word or phrase on the kanban board. The rest of the tasks will be hidden.

When you click on the x in the search field, the search filter will be removed and all your tasks become visible again.

4.2.4 CREATE NEW TASK

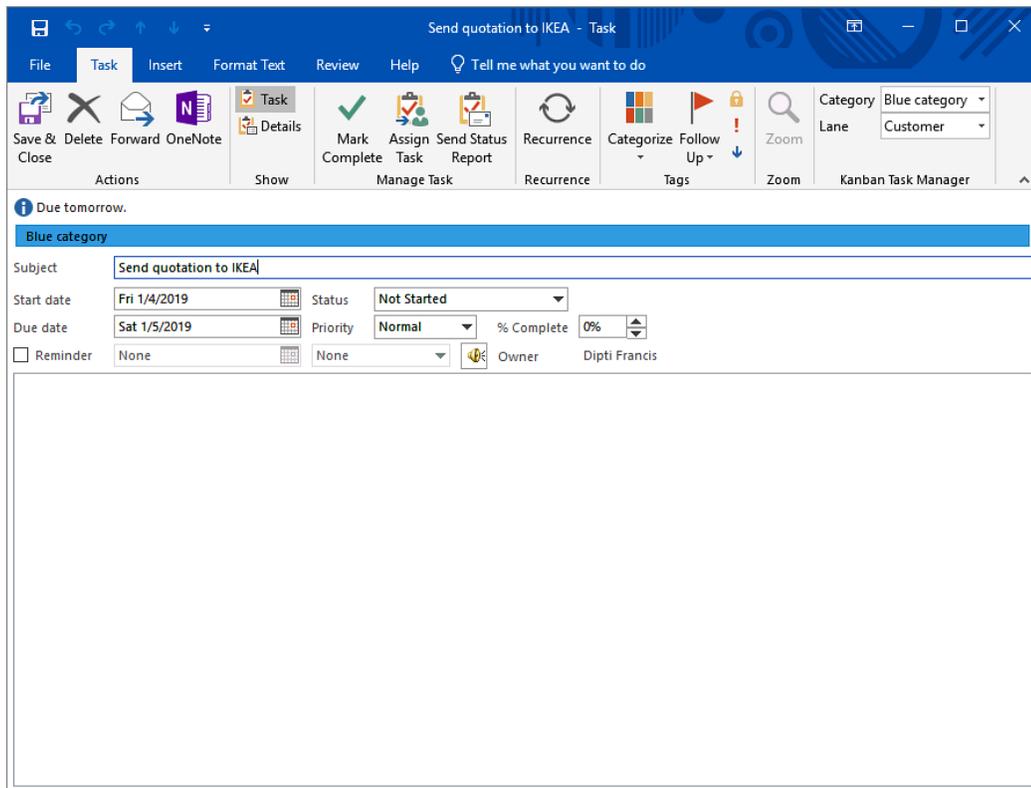
Kanban Task Manager tasks can be created in several ways:

- In the Outlook Tasks view:
 - Click on the New Task button in the Tasks View.
 - Click on 'New Items' and select 'Task' from the dropdown.



- In the kanban view:
 - Double click in the phase (and lane) where you want to create the new task – or in another phase (and lane). The phase (and lane) you doubleclick in, will be selected by default in the new task. If the view is filtered for category or priority that category/priority value will be the default one.
 - Write the subject in the search field and then click on the plus sign or Ctrl + Enter to open a task with that subject.



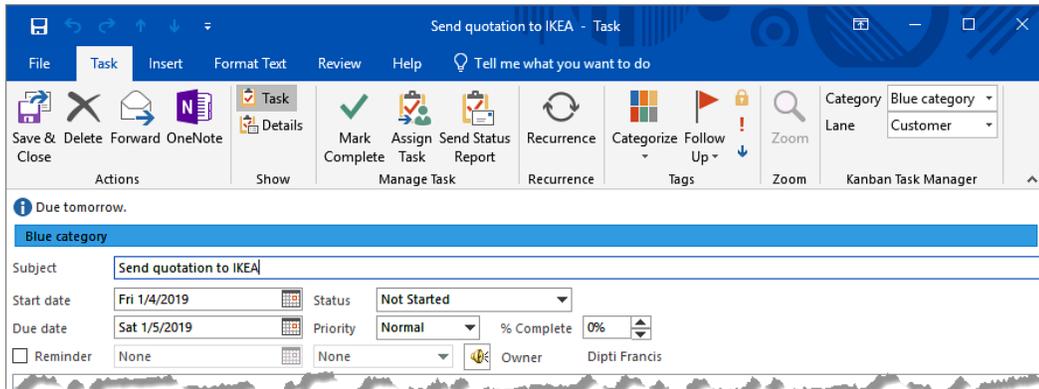


The first category from the categories list will be selected by default when you create a new task. Here in the image above, the Outlook category (Blue category) is selected as it was the first one in the list and is visible in blue color in the task form.

If a custom category happens to be the first one, then only the name of that category will be visible in the task form without any color, even if a color has been selected in the configuration page.

- o Click on the plus sign or Ctrl + Enter, without entering a subject in the search field. A blank task will open.

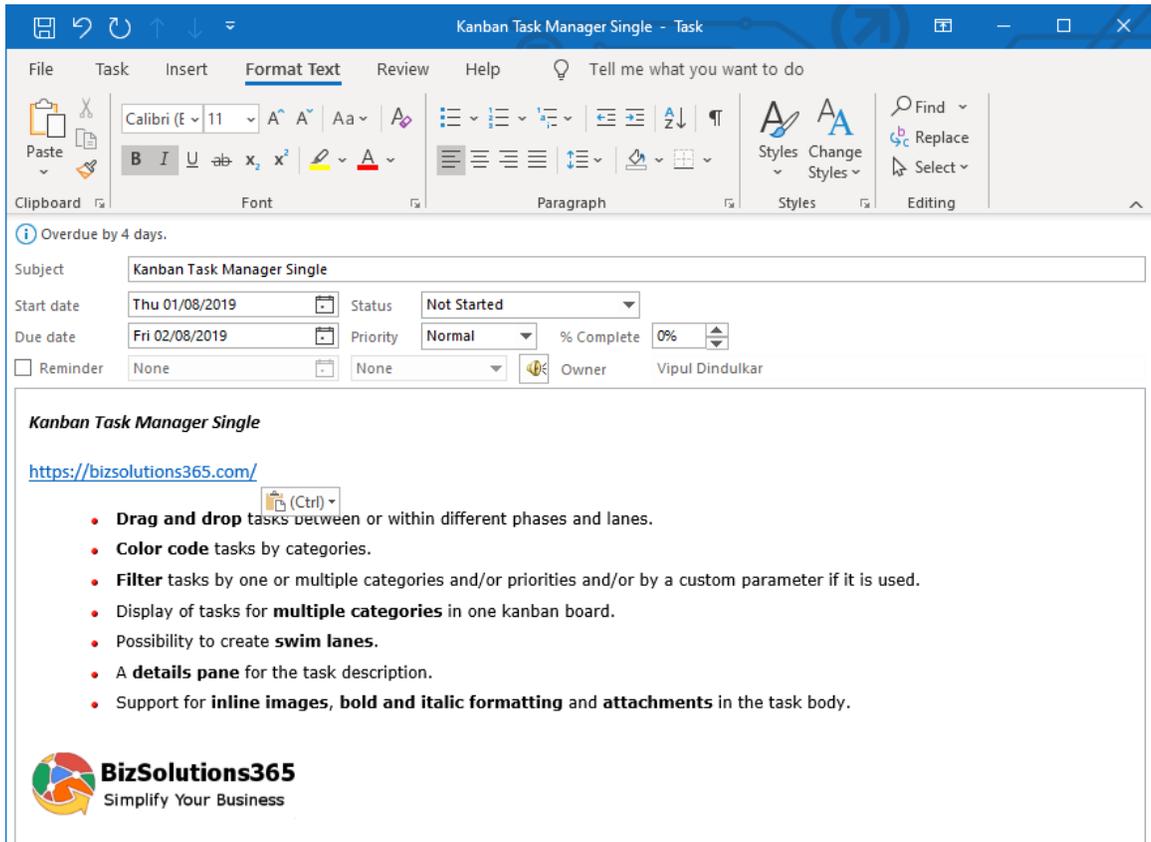
Kanban Task Manager uses standard Outlook task items, but the tasks have between one and three dropdowns, depending on if you use lanes and if you have created a custom field.



Enter or select the normal task info but also select a category, status (=phase on the kanban board) and lane (if used) for the task before you Save and Close. There might also be a fourth dropdown with values for a parameter that is unique for your *Kanban Task Manager*.

4.2.4.1 INLINE IMAGES AND FORMATTING

The task body supports inline images and bold and italic text, links and attachments. The formatting and images are shown when you open the task.



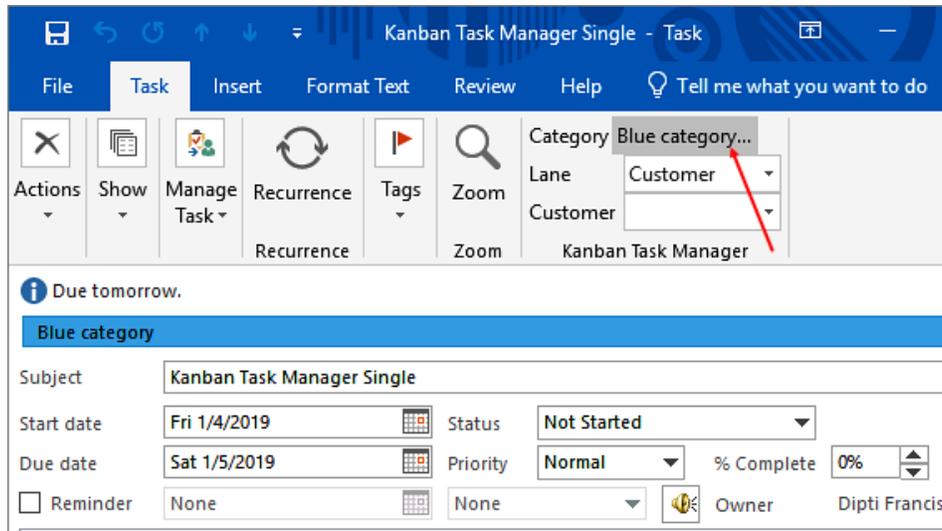
4.2.4.2 DEFAULT VALUES

When the task is created by clicking in a phase, that phase (and lane, if used) is selected as default in the dropdown. If category is filtered, then that value is also shown as default.

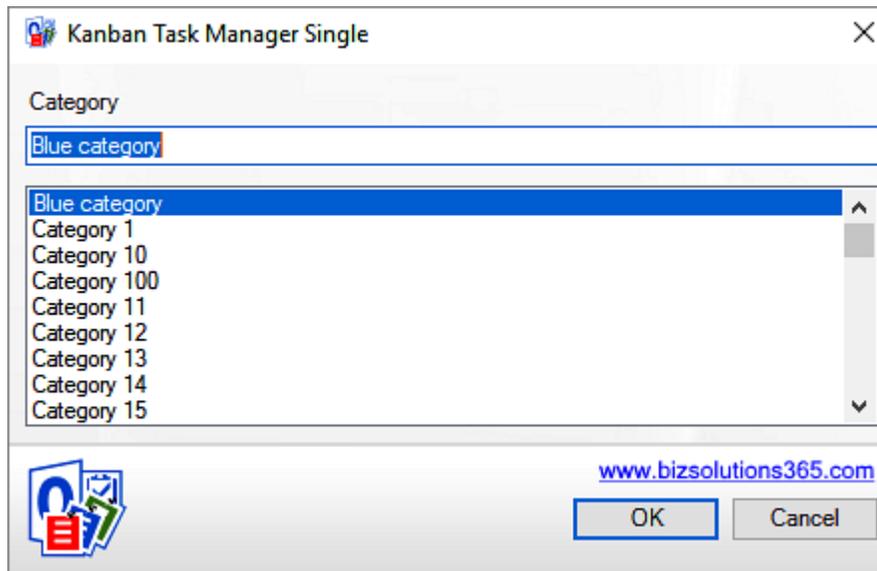
4.2.4.3 MORE THAN 100 VALUES

Using dropdowns is a good way of minimizing errors and making selection quick and easy, but if you have too many alternatives the dropdown will be difficult to handle. Therefore the dropdowns are converted into buttons to show phases and categories when the number of alternatives is more than 100.

In the image below the Category dropdown has been transformed into a button.

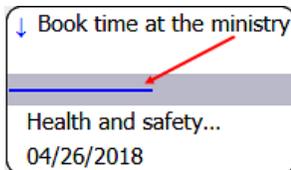


When you click on one of these buttons a new dialog will open. It has a list box with all the values and a text box of the auto-complete type. Write the first letters of the category name, and it will be completed automatically. Then click OK to select that category.



4.2.5 COMPLETED INDICATOR

If you fill out the % Complete field, the value will be shown as a line on the task card.



4.2.6 OPEN AND EDIT A TASK

Double click on a task card to open the task in edit mode.

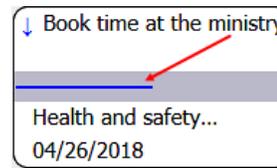
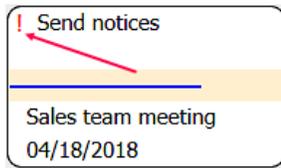
4.2.7 DELETE A TASK

To delete a task, open it and click on the X icon in the ribbon of the open task. Then the task will be deleted from Outlook.

4.2.8 PRIORITY

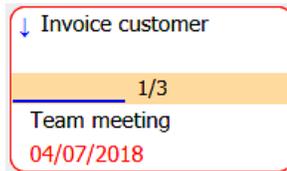
When you set the priority of a task, it will have an importance icon.

High priority tasks have red exclamation marks and low priority tasks have blue downward arrows. Tasks with normal priority do not show any icon.



4.2.9 TASK OVERDUE INDICATORS

When a task is overdue, this will be indicated by a red border, and the due date will be displayed in red.



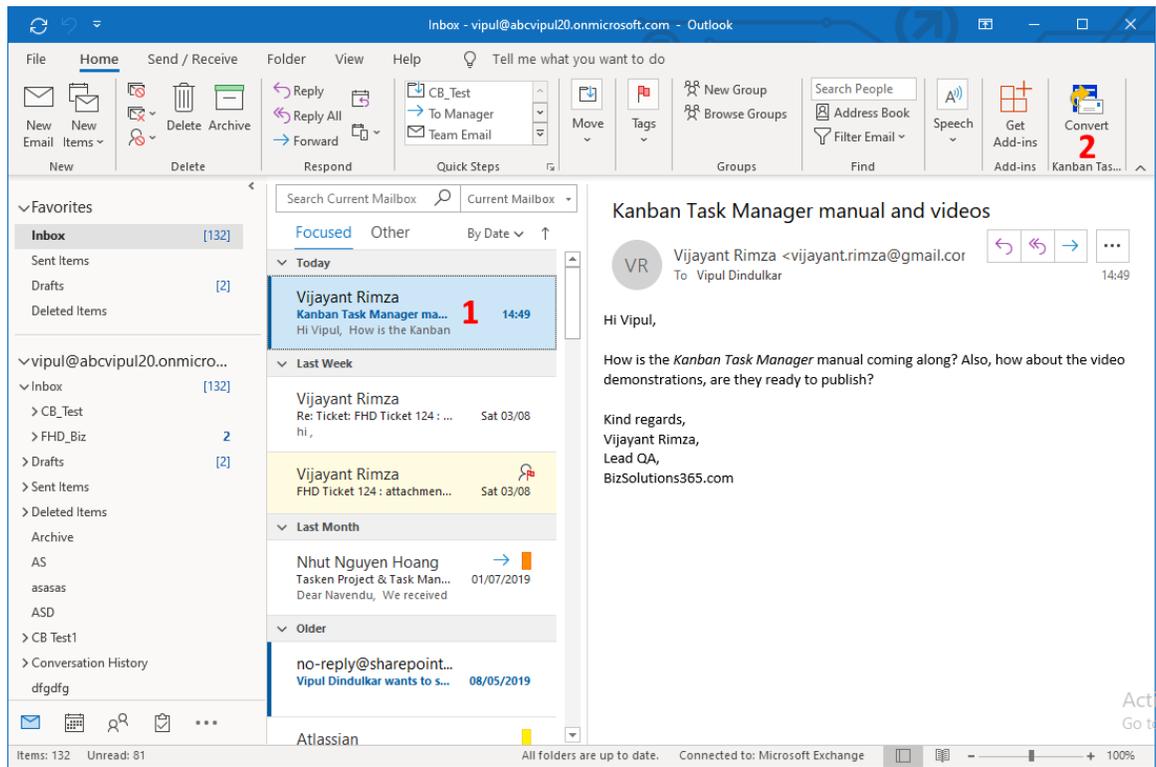
4.3 CONVERT E-MAILS INTO TASKS

In the Outlook mail view, you will see a Convert button that converts e-mails into tasks.

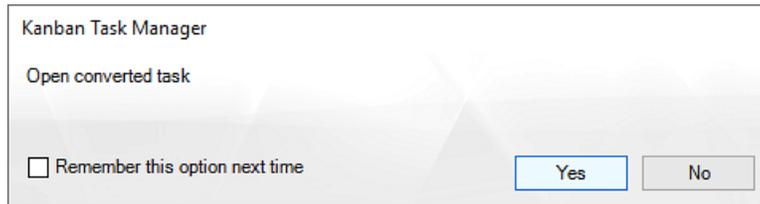
To convert an e-mail into a task, select the e-mail and click on the Convert button. Any attachments in the e-mail will be added to the new task.



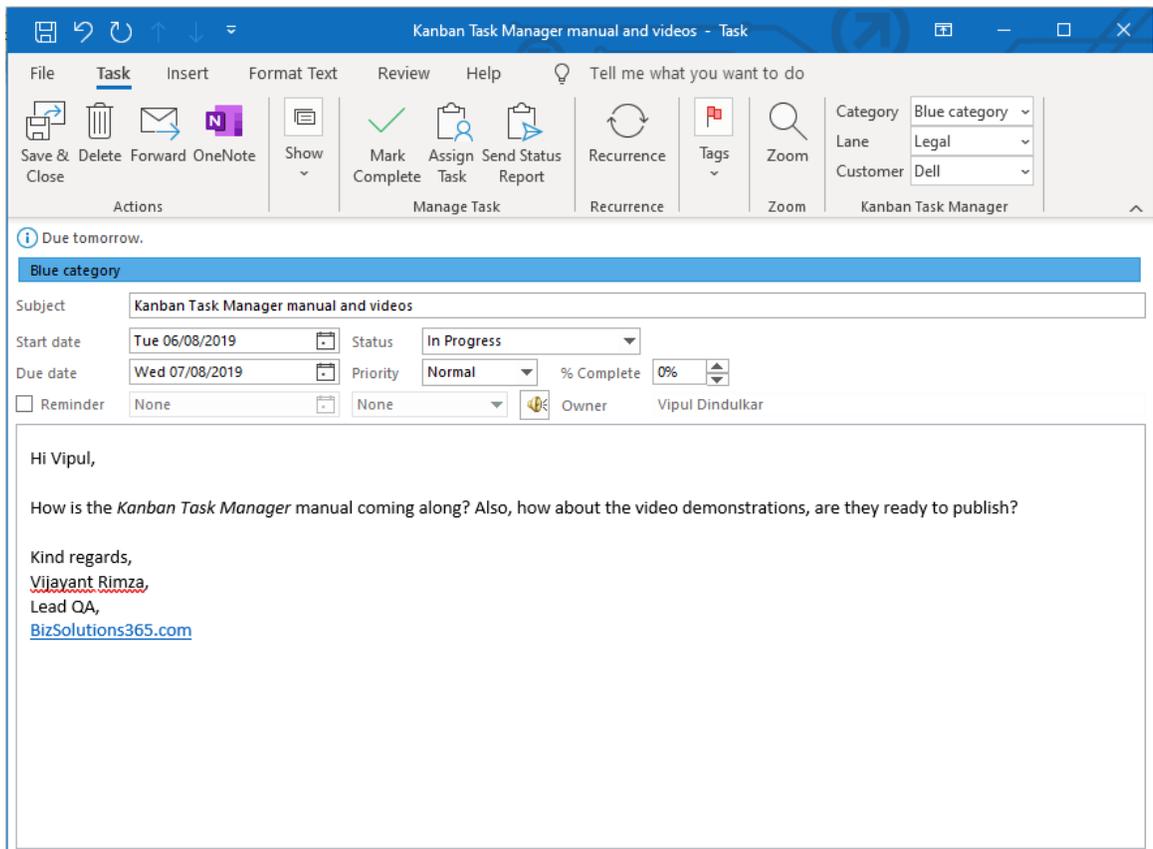
The same button is also displayed in the open e-mails, and then you only have to click on the button to create a task from the e-mail.



By default a dialog will open where you are asked if you want to open the converted task.



If you choose to open the task, you can tag the task with *Kanban Task Manager* values directly.

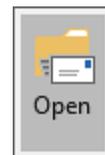


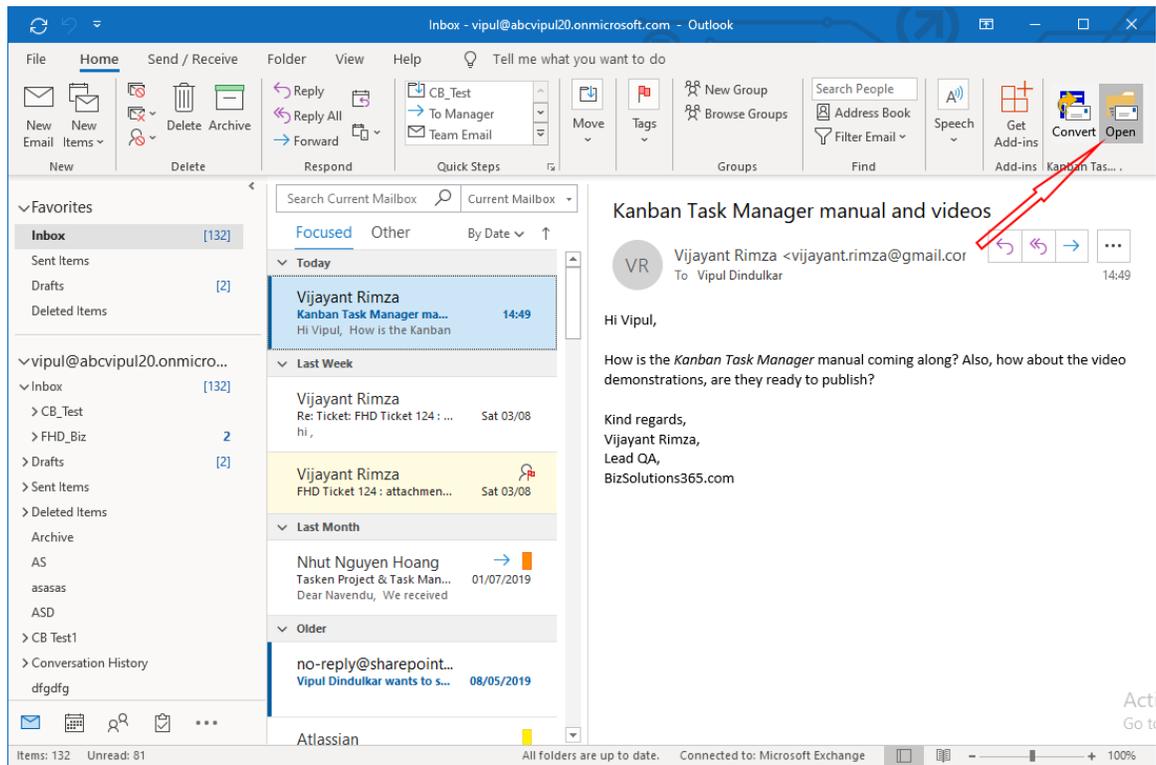
If you choose to not open the task, you can find it in the first phase on the kanban board.

4.3.1 OPEN CONVERTED TASK

When you select an e-mail that has already been converted into a task, an Open button will be displayed in the *Kanban Task Manager* ribbon group, so that you can open the connected task.

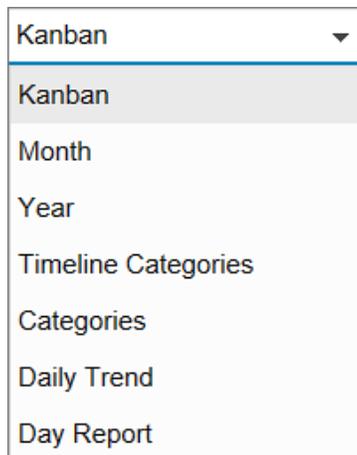
The Open button is also displayed in open e-mails, if they have been converted into tasks.





4.4 OTHER VIEWS

From the View dropdown above the kanban board, you can see the tasks in more views.



4.4.1 MONTH VIEW

When you select the Month View, you will see the open tasks for the current month displayed over the time slots from start date until due date. The time slots are colored with the category colors.

Month						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
31	01	02	03	04	05	06
Update customer list		Dipti, Use your badge in business communications				
		Arrange team meeting		Book hotel rooms		
				Send quotation		
				Kanban Task Manager error		Re: The Power BI
				KTM demonstrations		
07	08	09	10	11	12	13
Book hotel rooms			Kate Kalmstrom shared "SP Flows" with you			
Send quotation	Blog post on Kanban Task Manager					
Re: The Power BI	Don't mind numbering errors					
	FW: Delivery testing video					
14	15	16	17	18	19	20
	The Power BI manuscript					
		SharePoint presentation				
21	22	23	24	25	26	27
Send invoices		Trip to India				
		SharePoint flow demonstrations				
28	29	30	31	01	02	03
Trip to India						
		Book hotel rooms				
		Kanban Task Manager Documentation				

Select another month by clicking on the arrows in the month selector.

4.4.2 YEAR VIEW

When you select the Year View, you will by default see tasks from the current year. All days that have tasks are highlighted in yellow. When you hover over a highlighted date, you will see the task subjects for all the open tasks that cover the date.

The screenshot shows the 'Year 2019' selector at the top. Below it, a grid of 12 monthly calendars is displayed. The 'January' calendar is expanded, showing tasks for various dates: 'Transcribe meeting notes' on Jan 11, 'Invoice customer' on Jan 14, 'Transcribe meeting notes' on Jan 21, 'Transcribe meeting notes' on Jan 28, and 'Invoice customer' on Jan 29. Navigation arrows are visible on the right side of the year selector.

Select another year by clicking on the arrows in the year selector.

4.4.3 TIMELINE CATEGORIES

When you select the Timeline Categories view, you will see the tasks for one month grouped by category. You can drag and drop the tasks to change category.

The screenshot shows the 'Timeline Categories' view for '1 Jan 2019 - 31 Jan 2019'. Tasks are grouped into horizontal bars of different colors representing categories: Blue category (File the papers, Re: The, Invoice customer, Kanban Task), Category 13 (File the, Faheem sent a message, Order invitations, Transcribe meeting notes), Category 14 (Send notices, Invoice customer), Category 98 (Send notices), Documentation (Dipti, Use your badge in business, The Power BI manuscript), Green category (Forward memos, Arrange, Transcribe meeting notes, Invoice customer), Orange category (Send receipts, Invoice customer, KTM, Trip to India, Send), Purple category (Book hotel rooms, File the papers), Red category (Update, Transcribe meeting notes, Order invitations, SharePoint presentation, Rate), and Yellow category (Send notices, Transcribe meeting notes, Book hotel, Transcribe meeting notes).

Select another month by clicking on the arrows in the month selector.

4.4.4 MONTH AND TIMELINE CATEGORY FEATURES

4.4.4.1 OPEN TASK

Click on the colored time slot to open a task.

4.4.4.2 CREATE A NEW TASK

Click in an empty cell to create a new task. The values of the selected cell will be filled out by default.

4.4.4.3 MOVE TASKS

Drag and drop tasks to move them to other time slots.

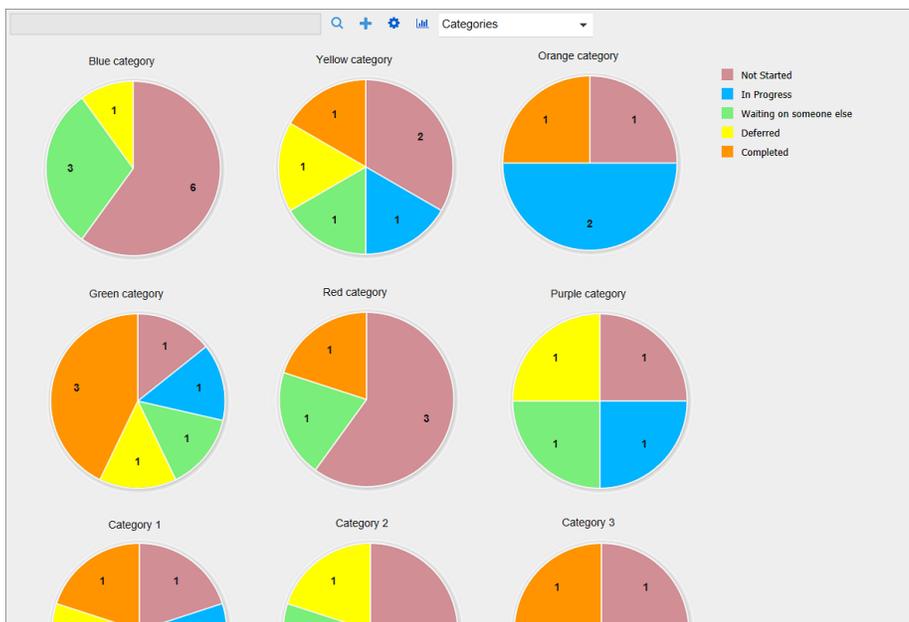
4.4.4.4 DRAG TIME EXTENSION

Drag one end of the time slot to extend or reduce its length and thereby change start and due date.

	01	02	03	04	05	06	07
Building a playground	Send notices						
Composing instructions manual	Order invitations and distribute						

4.5 CATEGORIES VIEW

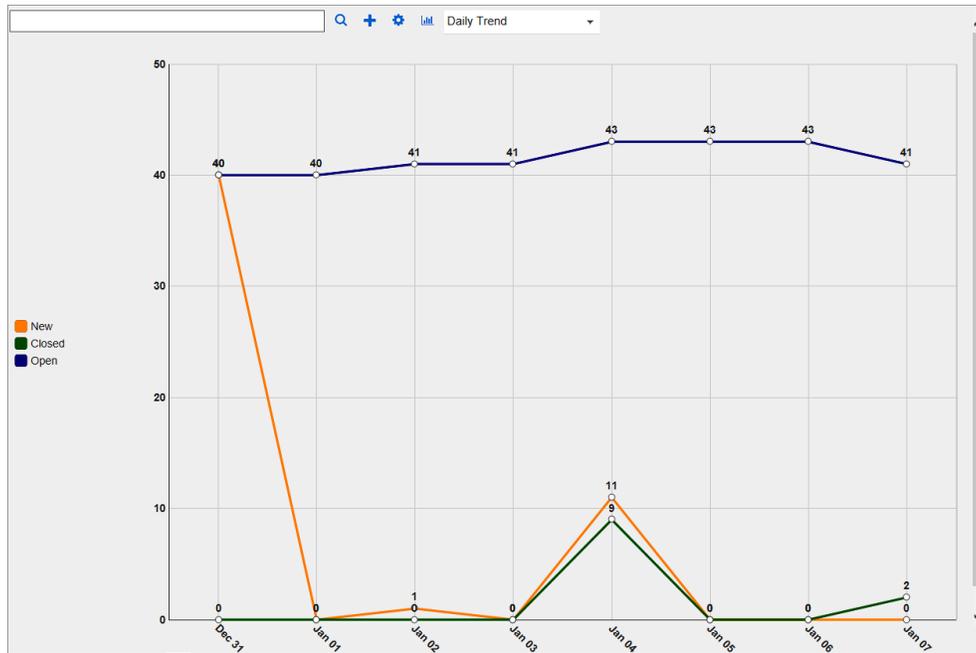
In the Categories View each category is visualized as a pie chart. The phases that contain one or more tasks belonging to the category are displayed as slices of the pie. The size of the slice is relative to the total number of tasks for the category.



The number of tasks in the phase is indicated with a number. By hovering with the mouse over a pie slice you can see the name of the phase and the number of tasks.

4.6 DAILY TREND

The Daily Trend displays the status of all tasks from the last 30 days in a line chart representation form. The line chart is updated each time a task is edited, added or closed.



4.7 DAY REPORT

The Day Report displays the number of tasks that were created, open, closed, delayed and modified on the selected date. By default, it displays the data of current date minus one. Select the date from the date icon at the top.

🔍 + ⚙️ 📊 Day Report ▼

< 01/04/2019 > 📅

Created: 4

Hiring Outlook 2019

Business approvals list

Kanban Task Manager error

The Power BI manuscript

Open: 11

Invoice customer

Send notices

Invoice customer

Transcribe meeting notes

File the papers

Send notices

Transcribe meeting notes

Invoice customer

File the papers

Order invitations and distribute

Order invitations and distribute

Closed: 9

Send notices

File the papers

File the papers

Send notices

Send notices

Transcribe meeting notes

Order invitations and distribute

File the papers

Invoice customer

Delayed: 8

Invoice customer

File the papers

Order invitations and distribute

Order invitations and distribute

Order invitations and distribute

Order invitations and distribute

File the papers

Forward memos

Modified: 3

Transcribe meeting notes

File the papers

Send notices

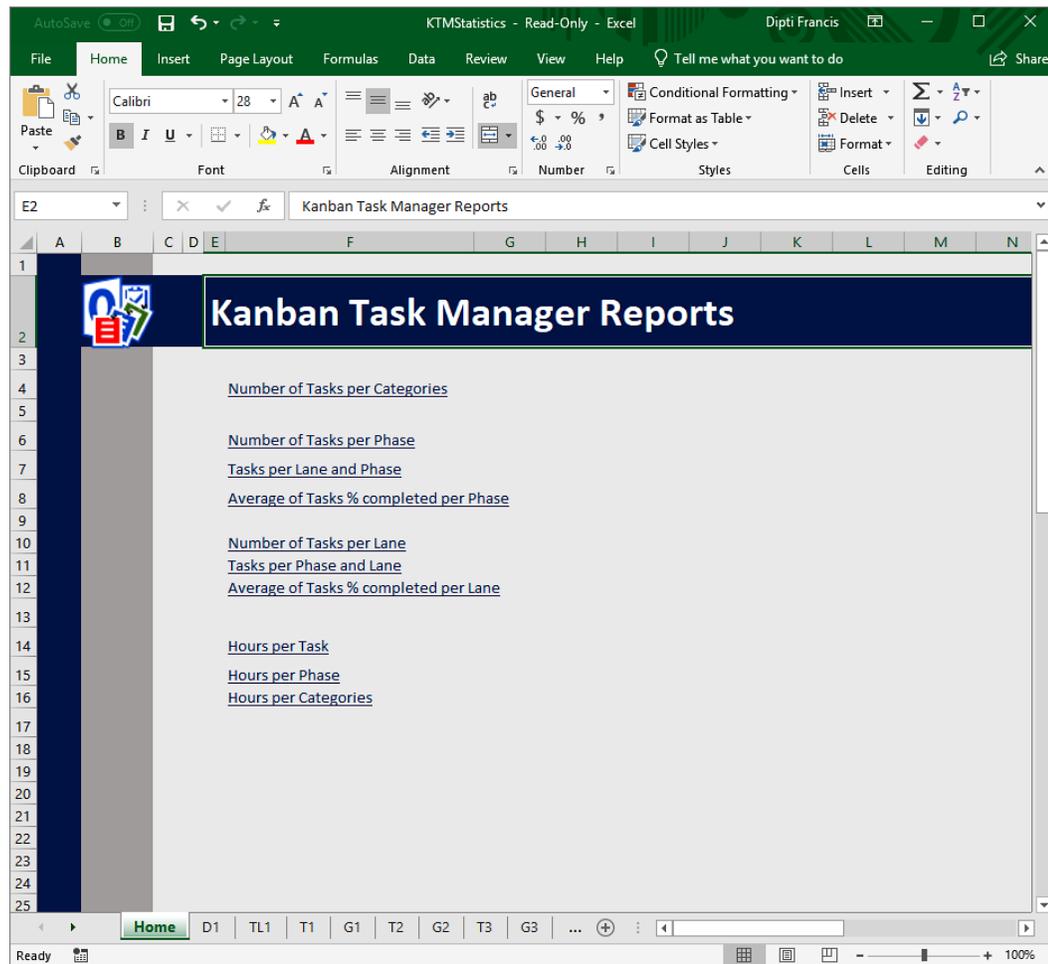
5 STATISTICS

Kanban Task Manager data can be studied in different Excel reports. You can reach the statistics by pressing the Statistics button in the *Kanban Task Manager* toolbar. You must be connected to the internet to generate new reports.



Kanban Task Manager generates various reports, and by using the table under the first tab in the datasheet, where all data is gathered, you can also create your own reports.

Open the Excel reports or save the file to your computer to work with it.



Kanban Task Manager offers several Excel reports:

- Number of tasks per Category
- Number of tasks per Phase
- Tasks per Lane and Phase
- Average of Tasks % Completed per Phase

When swim lanes are used, there are three additional default reports:

- Number of Tasks per Lane
- Tasks per Phase and Lane
- Average of Tasks % Completed per Lane

When Time Logging is enabled, there are three more default reports:

- Hours per Task
- Hours per Phase
- Hours per Category

When a custom parameter has been added via the Extra field feature in the settings, there will be one more report that shows the number of tasks for each value of the custom parameter.

The different reports can be reached via the links on the Excel homepage or via the tabs at the bottom of the sheet.

Each report is shown as a pivot table and as a chart. All standard Excel features can be used with these reports.

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is titled 'Number of Tasks per Phase' and is located in the range A3:B10. The PivotTable fields are set to 'Phase' for the Row Labels and 'Total' for the Values. The data is as follows:

Phase	Total
Not Started	11
Completed	12
Deferred	13
Waiting on someone else	12
In Progress	10
Grand Total	58

The PivotTable Fields task pane on the right shows the following configuration:

- Choose fields to add to report:
 - Task ID
 - Subject
 - Categories
 - Phase
 - Lane
 - Priority
 - Start Date
 - Due Date
 - Date Created
- Drag fields between areas below:
 - Filters: (Empty)
 - Columns: (Empty)
 - Rows: Phase
 - Values: Phase

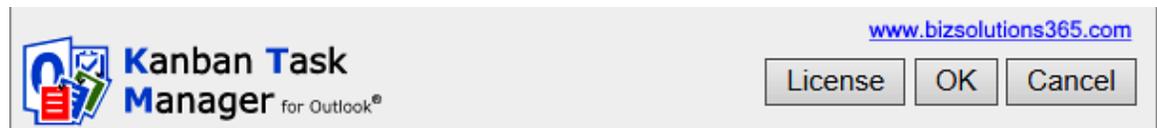
6 UPGRADE

When you run the *Kanban Task Manager* setup file, the installer will know if there is an existing installation. When there is, that installation will be upgraded and no new installation will take place. Therefore the upgrade looks just like the new installation.

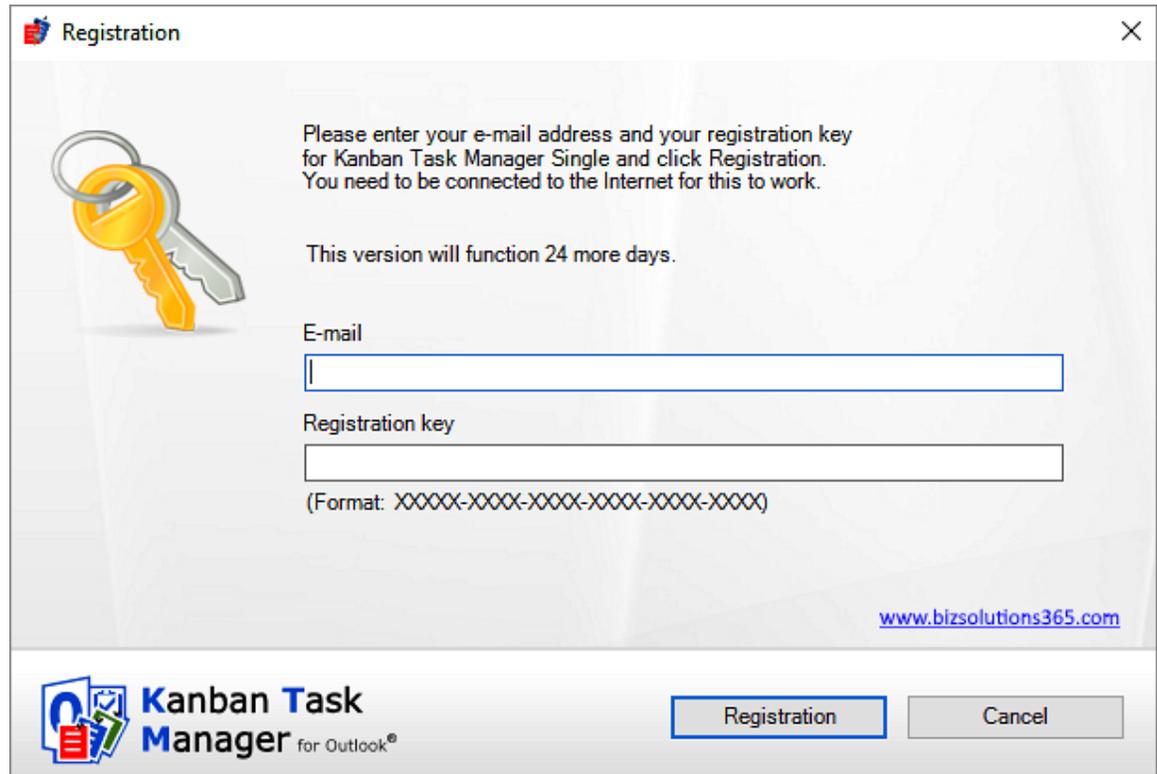
7 REGISTRATION AND TRIAL INFO

You may evaluate *Kanban Task Manager* for 30 days. If you want to continue using the program after the trial period, you must register it.

The registration is performed by clicking the 'License' button in the Configuration page. When the registration is finished this button will be hidden.



Enter your e-mail address and the registration key you have received from the bizsolutions365.com Support and click Registration. You must be connected to the internet for this to work.



8 SUBSCRIPTION

Kanban Task Manager is subscribed to, and support, free upgrades are included in the subscription fee. Refer to the *Kanban Task Manager* Subscription page:
<https://bizsolutions365.com/subscription/>

9 CONTACT

If you have any kind of problem or questions about *Kanban Task Manager*, there are several ways of contacting us:

E-mail support@bizsolutions365.com – Technical issues

sales@bizsolutions365.com – General issues

Telephone +91 780 600 6234

Online chat www.bizsolutions365.com

10 UNINSTALLATION

Kanban Task Manager is uninstalled via the Control Panel, Programs and Features.

