Kanban Board

Inogic

User Manual

Content

Introduction

Kanban Board is a productivity app to visualize your Dynamics 365 and Dataverse (Power Apps) data in a Kanban View. With the ability to categorize the data into lanes and rows it helps with a quick review of the records in a card-based view and easily identify the status of the records. This helps to search and filter records quickly as per business requirement.

Salient Features:

- Kanban Board presents the selected View in a Kanban view for quick access and easy understanding and classification of the data in the view
- Kanban view of records as per Business Process Flow. Allows to pin BPF for Global or Personal use.
- Group records in row based on selected field value
- Supports moving the records around from one lane to another with a quick drag and drop action
- Quick access to important information in a compact card view
- Define quick activity actions for the records
- Works in context of the native CRM environment and responds to all native ribbon actions available for traditional views
- Support for search through native quick search available for views in CRM
- Records in the lanes can be sorted. It also supports filtering of the data in the view by 'CreatedOn' date
- Support to view aggregate field value of records
- Support to sort records in Kanban View at global level

Available for: Microsoft Dynamics 365 v9.1 onwards, Dataverse (Power Apps).

Deployment: Dynamics 365 online and On-Premise 9.1 with SP1.

Assigning Security Role

Kanban Board solution comes along with the following security roles for users:

- **Kanban Board Administrator:** The user with **Kanban Board Administrator** security role can see both the BPF pins i.e. Global and Personal. The user can also view and use the Kanban Board Features for data visualization in Dynamics 365 CRM.
- **Kanban Board User:** The user with **Kanban Board User** security role can view and use Kanban Board features for data visualization in Dynamics 365 CRM. Also, the user will only see the Personal pin against the BPF's.

NOTE: *Only a user with System Administrator Role or System Customizer Role can install and configure the solution.*
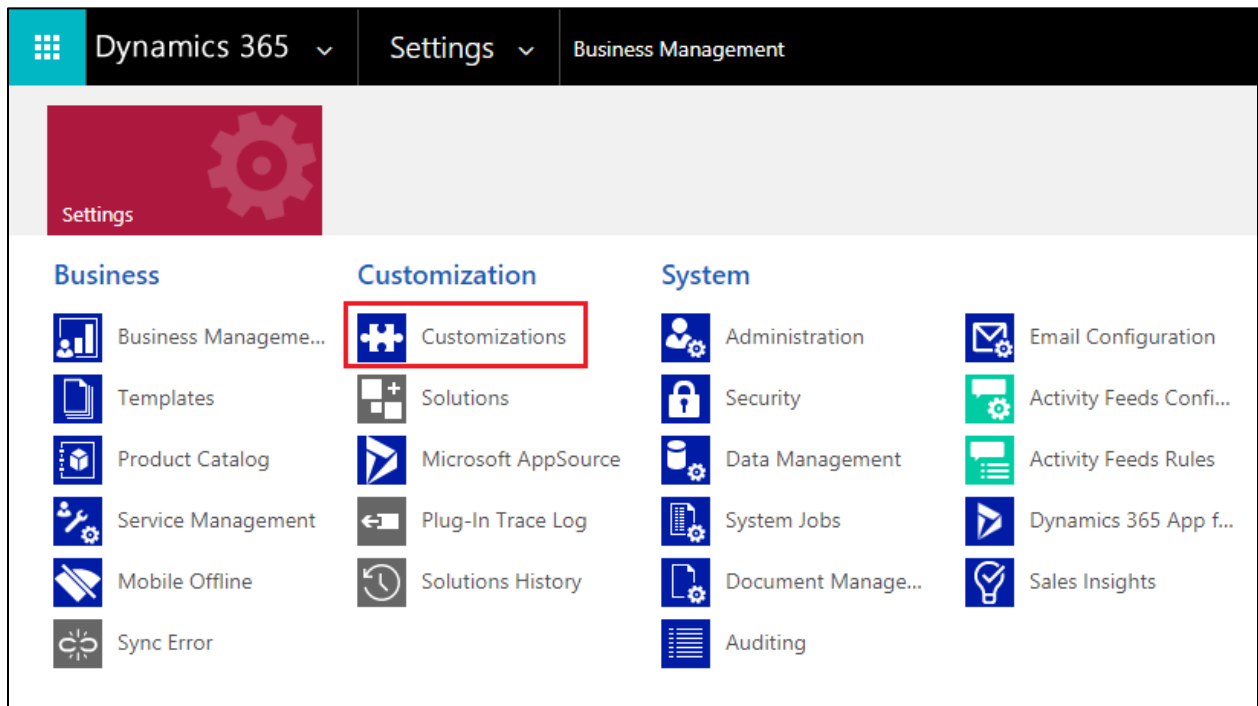
Kanban Board Configuration

Kanban Board configuration is quite easy and simple. In this document we will see how to configure Kanban Board Control in your Dynamics 365 for Case Entity.
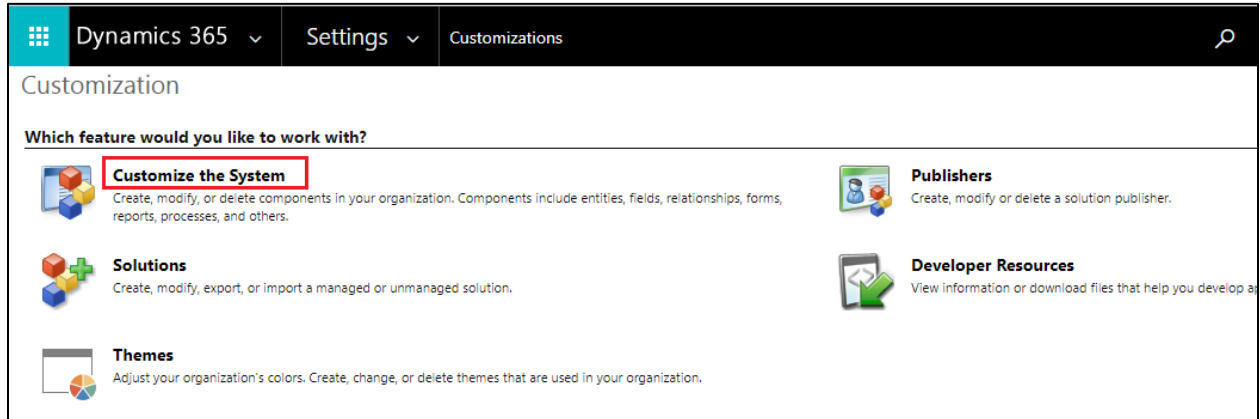
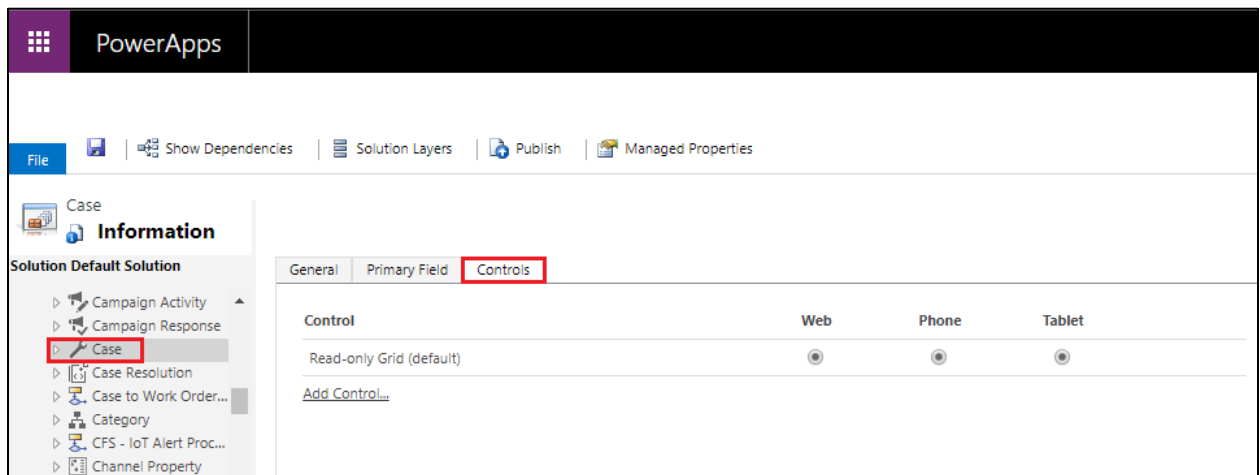1) Click on gear icon at top right → Select Advanced settings.
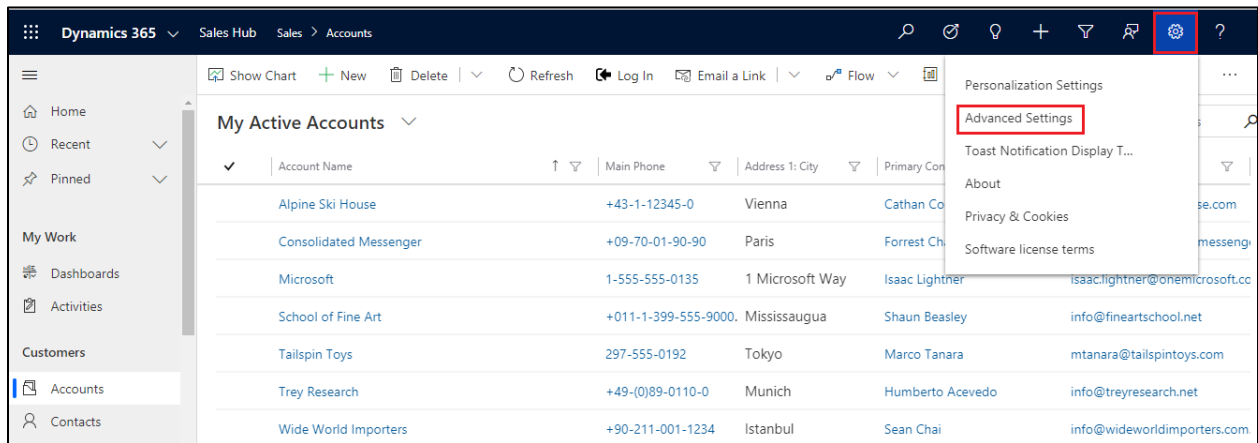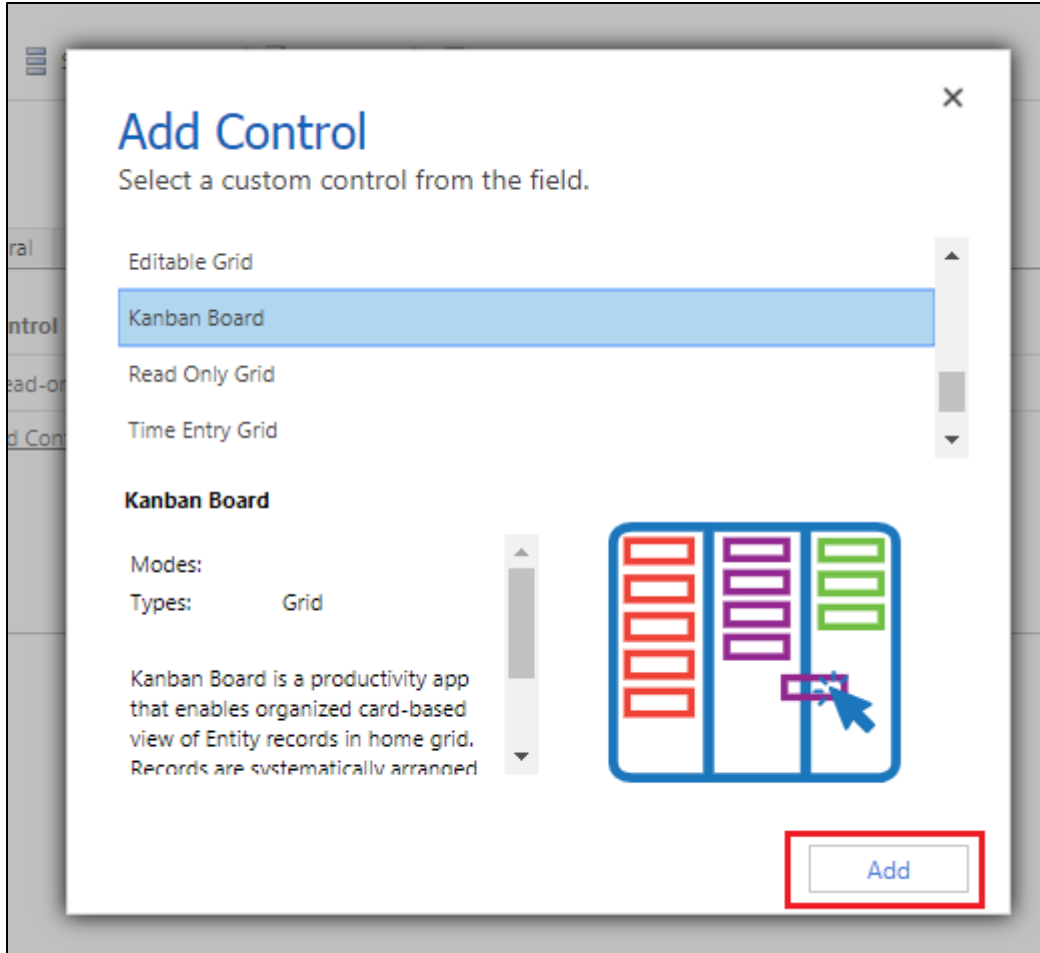

2) Then go to Settings → Customizations.

3) Next click on **Customize the System**.

4) Now go to Components → Entities → Select Case → Click on the last tab – Controls.

5) Now click on Add Control→ Select Kanban Board → Click on **Add**.

6) The radio button before Kanban Board denotes by default which control is to be loaded for Case Entity i.e. CRM OOB Grid (Read-only) or Kanban Board. If you want to display Kanban Board on Web (Computer or laptop devices) then select Web Radio button before Kanban Board. Similarly, you can select Phone or Tablet Radio button to display Kanban Board on Phone or Tablet. Here we have selected all three display modes.
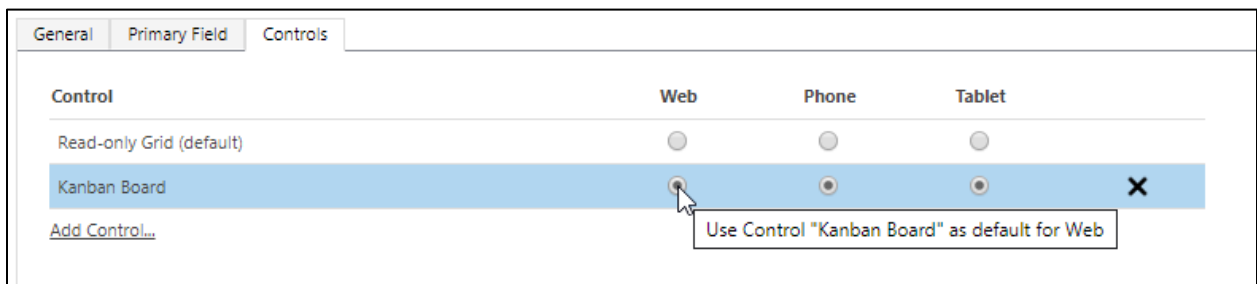
7) Next, for the field Lane Filter Criteria – Select the field based on which Lists will be categorized. Here, since we are selecting statuscode the list will be created based on Status Reason of Case Entity. For example: In Progress, On Hold , Waiting for details, etc.
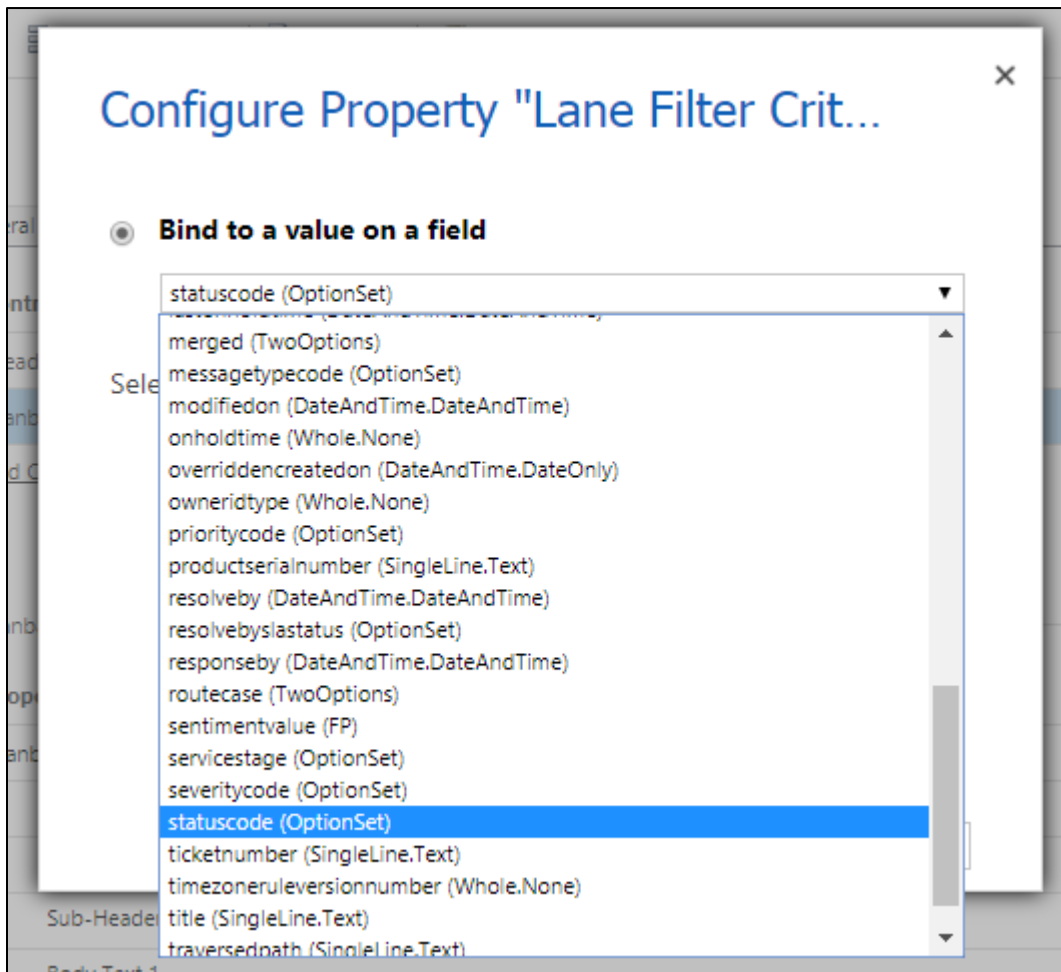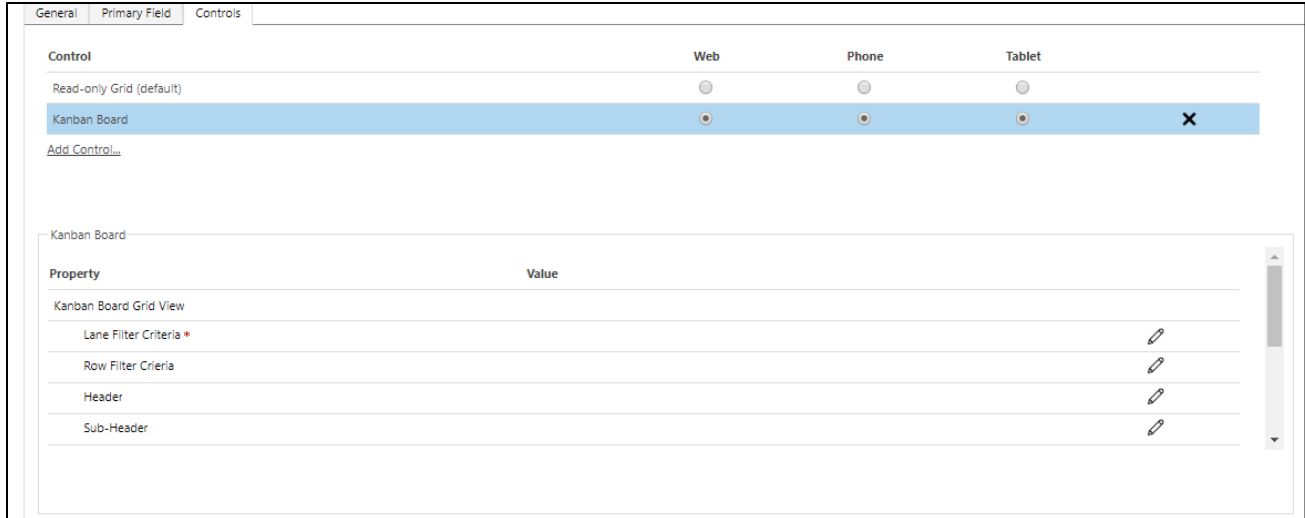
8) Next, for Row filter criteria – Select any given field from the dropdown based on which rows will be created. If Non-OptionSet field is selected then a 'Drop Zone' will be available in Kanban view to drag and drop cards from one lane to another to update only the lane.
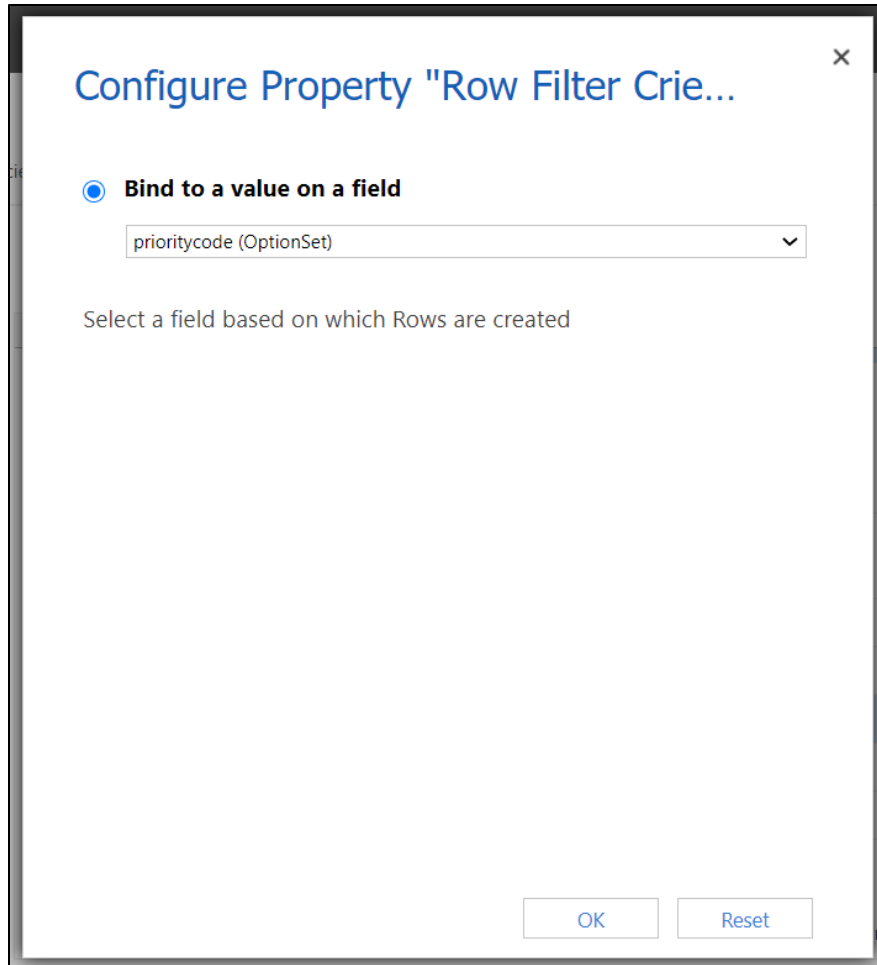
9) For Header - Select the field value that is to be displayed on header of card. In similar way populate the Sub-Header fields.
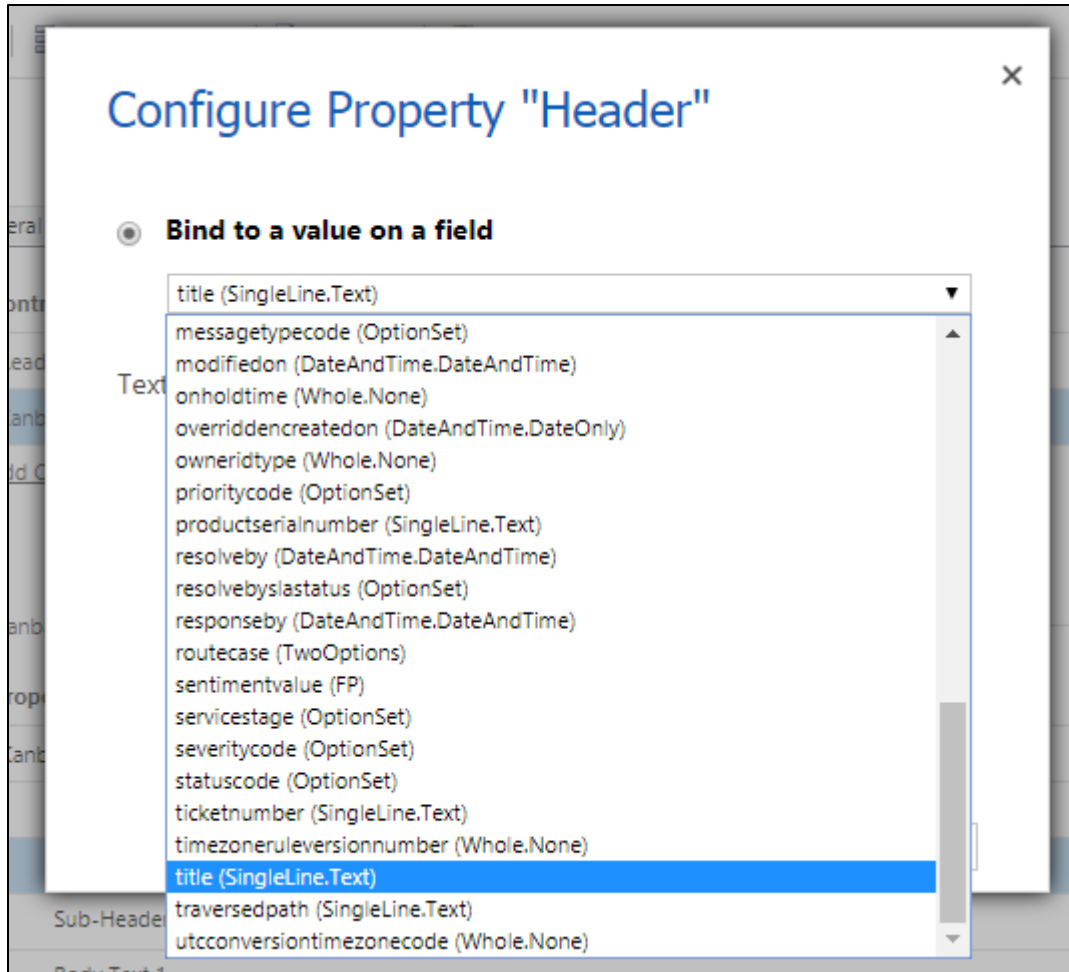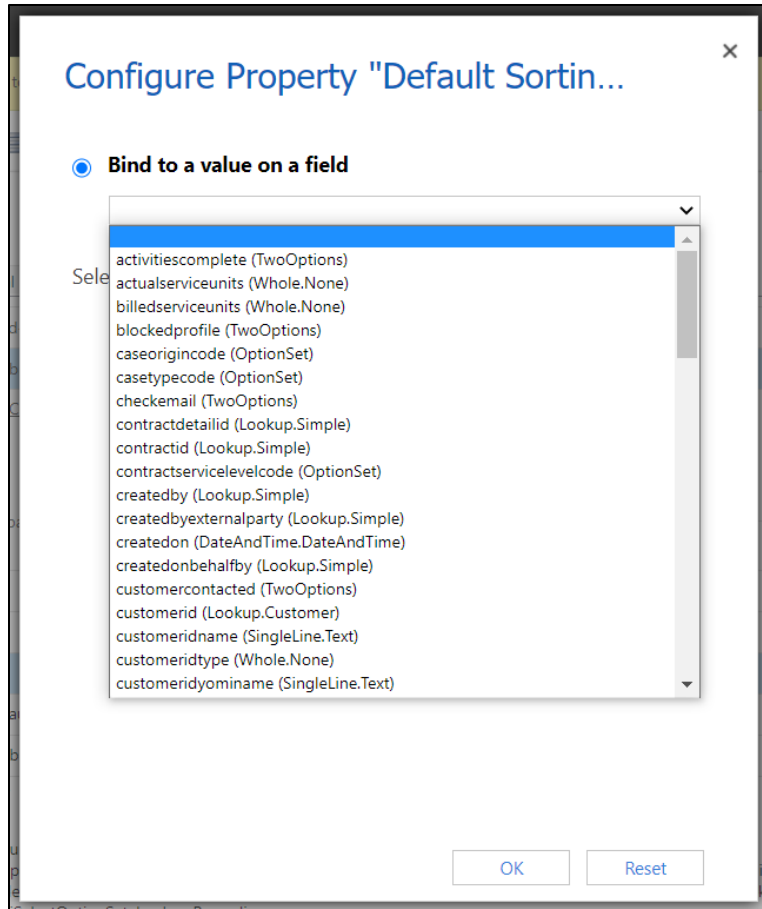
10) For Body Text 1 - Select any field value that is to be displayed on the body of the card. Similarly, select the field values for Body Text 2 & Body Text 3.
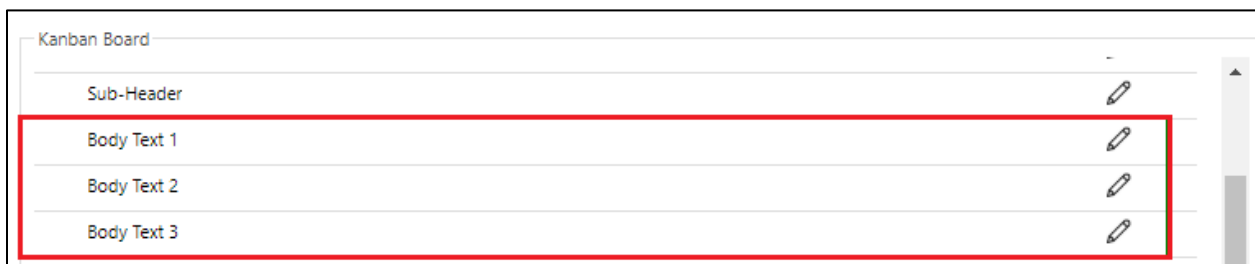
11) For Default Sorting Attribute - Select any field value based on which cards will be sorted in order.

12) For Aggregate Field 1 – Select any fields with numeric, decimal or currency datatype. For example, budget amount, actual value, exchange rate, etc. Similarly, select the field values for Aggregate Field 2 & Aggregate Field 3.
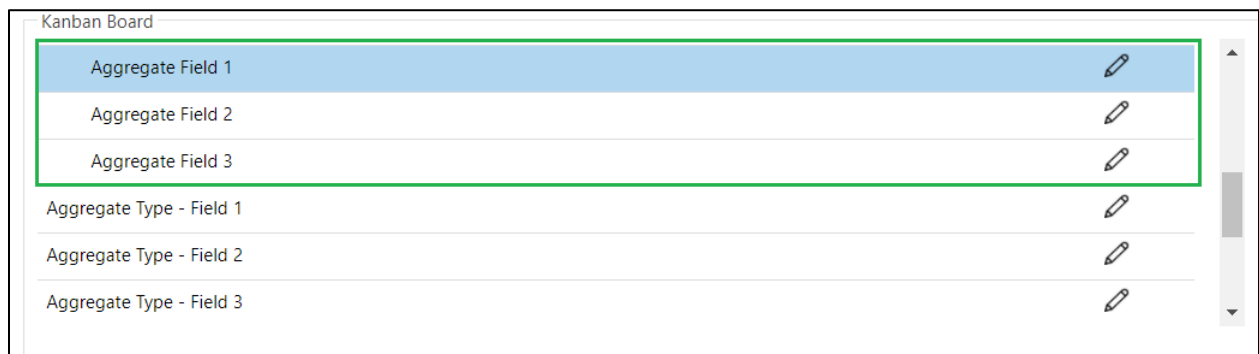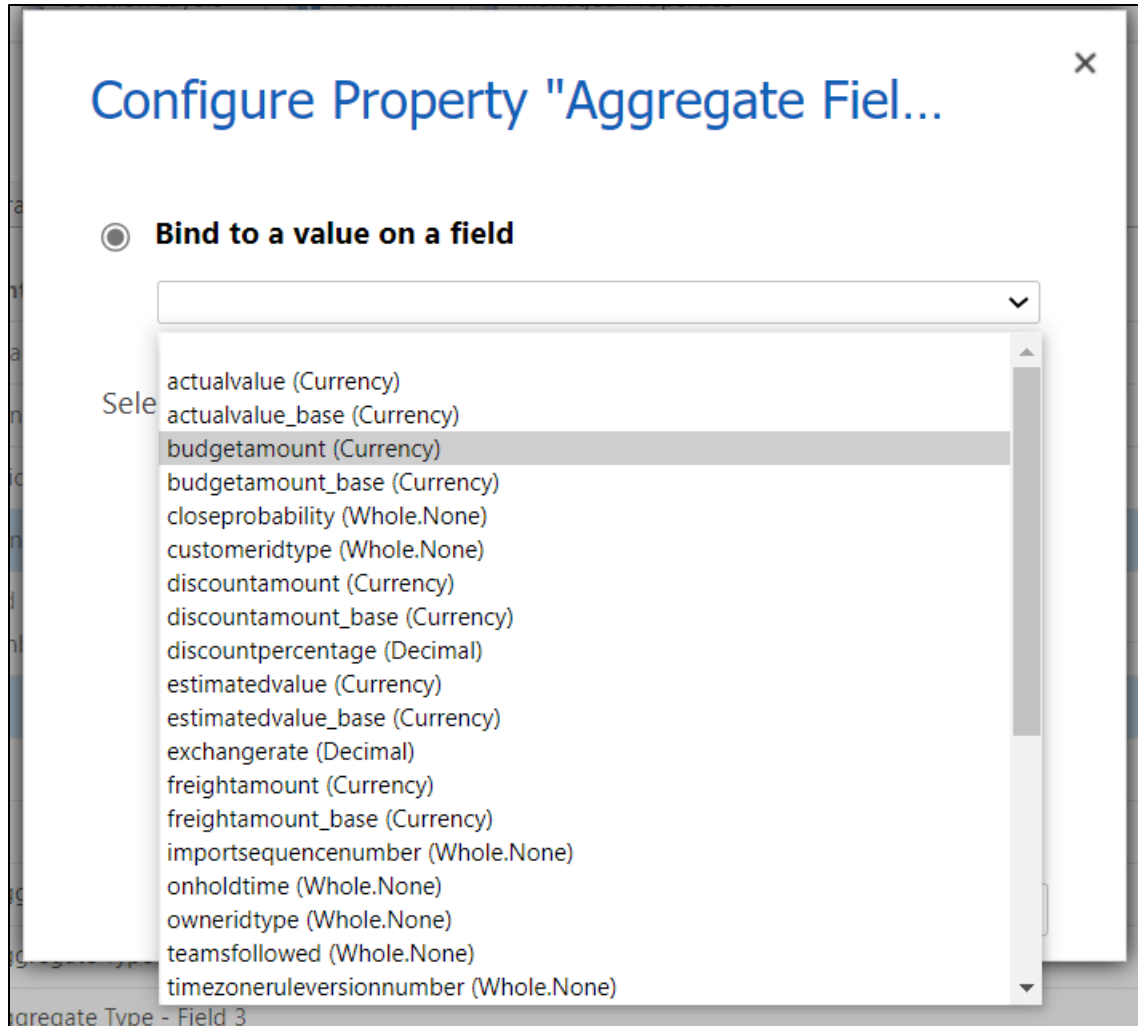
13) For Aggregate Field Type 1 – Select either Sum, Max, Min or Avg. Based on this, the aggregate value of the above chosen fields will be represented on lane and row headers in the Kanban View. If a value is not selected, then 'SUM' will be taken as default value. Similarly, select the values for Aggregate Field Type 2 & Aggregate Field Type 3.
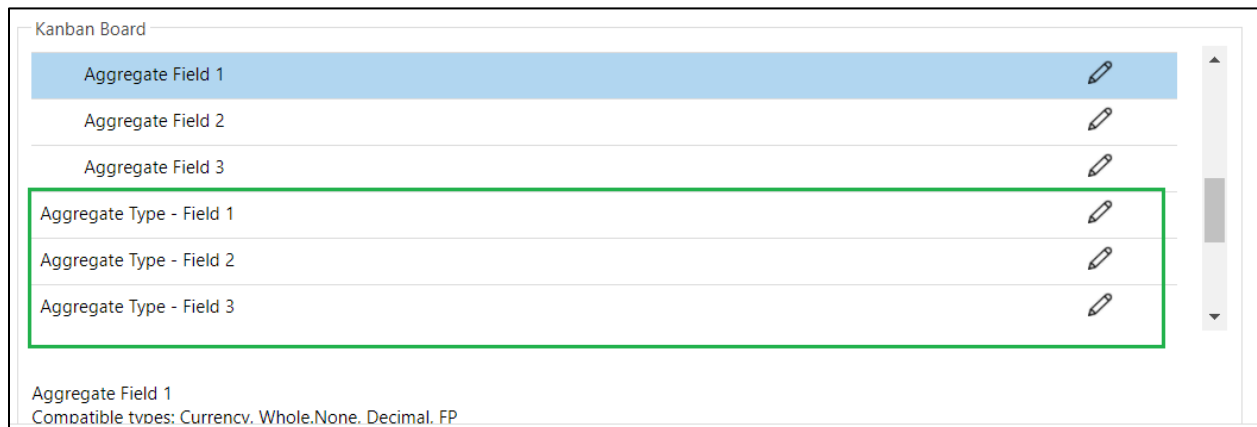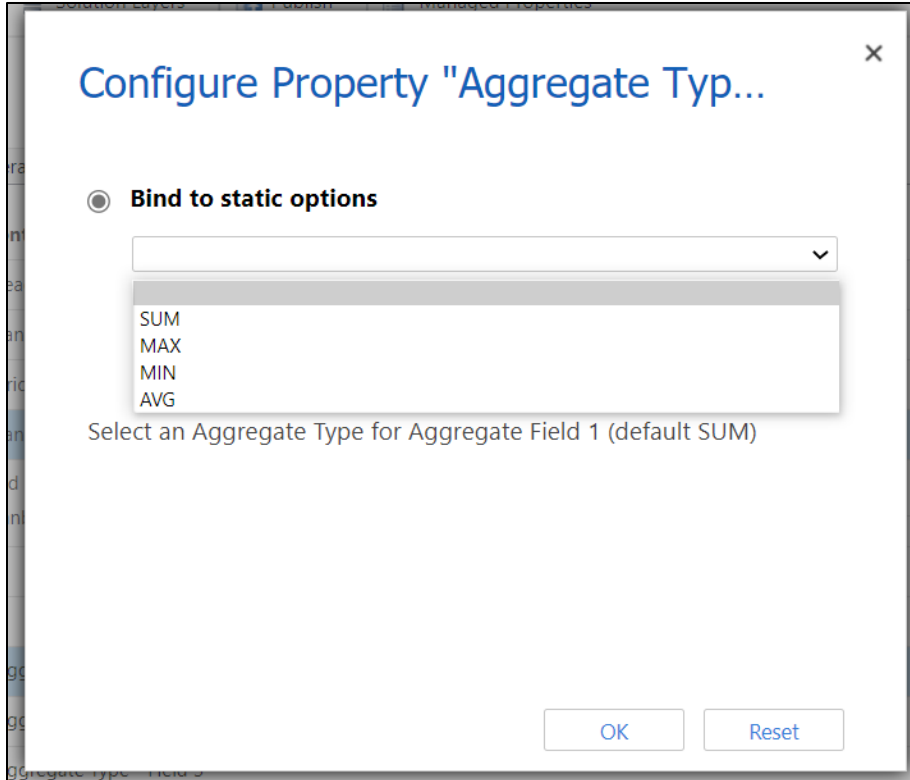
14) For Default Sorting Direction - Select either Ascending or Descending.
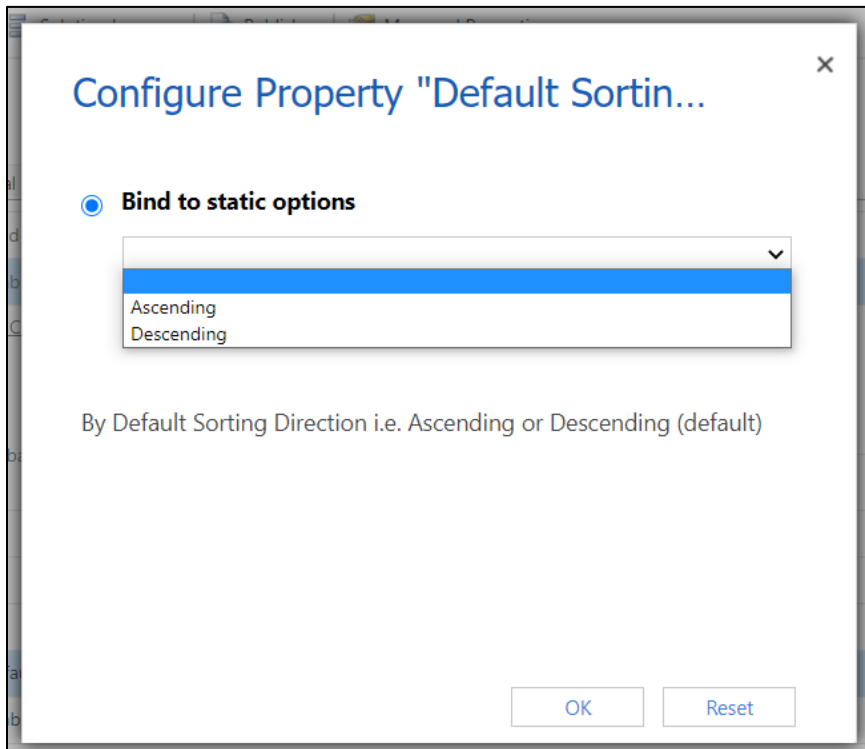
15) For Business Process Flow – Select either 'Y' (default setting) or 'N'. This field will provide you Kanban view of records as per the various Business Process Flows available in Case entity.

16) For Activity Name - Enter up to 3 Activity type entity logical name that you want to display on card. Now you have to just click on these icons to create activities from Kanban Board.

17) For Card Collapse - Enter the default card mode to display the details of records. (Y for collapsed mode and N for expanded mode). If the field is left blank then cards will be displayed in default **expanded** mode.


18) For **Row Collapsed** - Enter the default card mode to display the details of records in rows. (Y for collapsed mode and N for expanded mode). If the field is left blank then rows will be displayed in default collapsed mode i.e. expanded mode.

Configure Property "Row Collapsed...

◉ **Bind to a static value**

SingleLine.Text ⌄ | N |

○ **Bind to a value on a field**

| ⌄ |

Default row collapsed to be opened i.e. Y = collapsed, N = expand(default if none entered). Note: Row collapsed is only applicable for Row Filter Criteria

OK   Reset
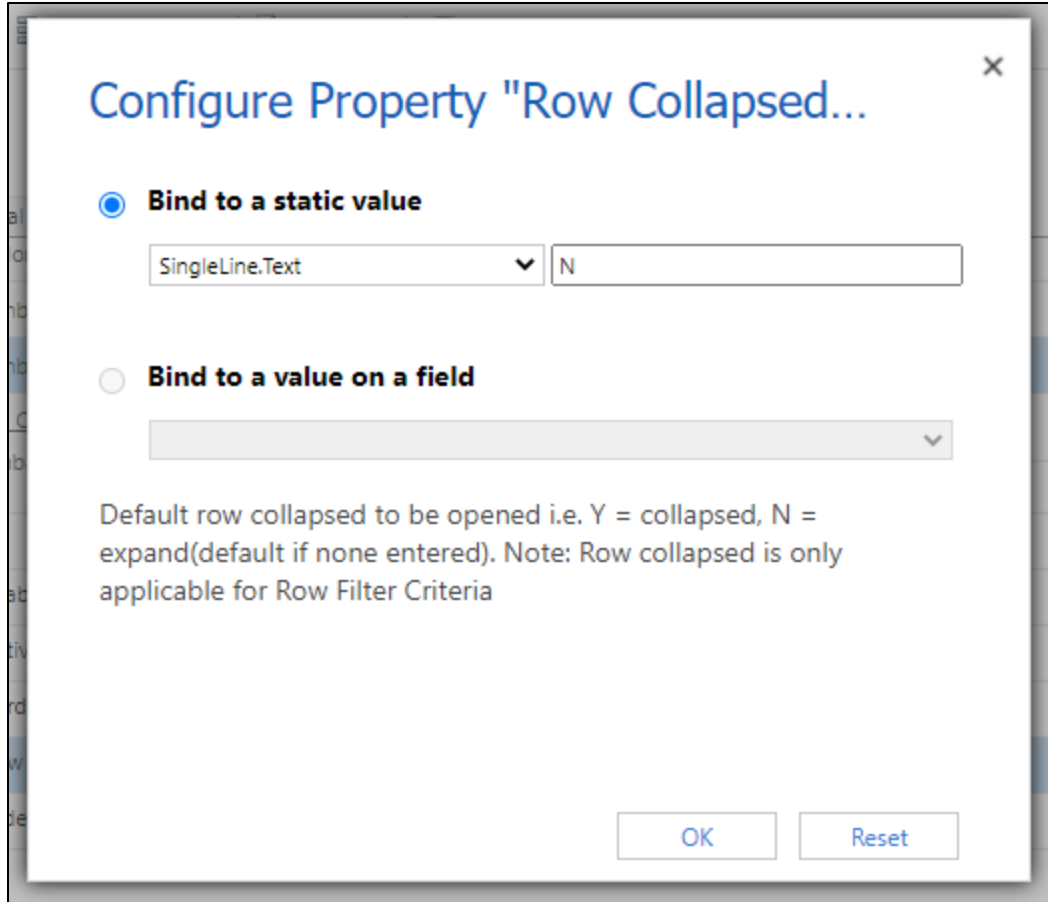
Given below is the example of Kanban Board configuration for Case entity.

Kanban Board

Property	Value	
Kanban Board Grid View		
Lane Filter Criteria *	statuscode (OptionSet)	✎
Row Filter Crieria	prioritycode (OptionSet)	✎
Header	title (SingleLine.Text)	✎
Sub-Header	ticketnumber (SingleLine.Text)	✎
Body Text 1	caseorigincode (OptionSet)	✎

19) After filling all the details, the next step is to save the cofiguration and then finally publish it.
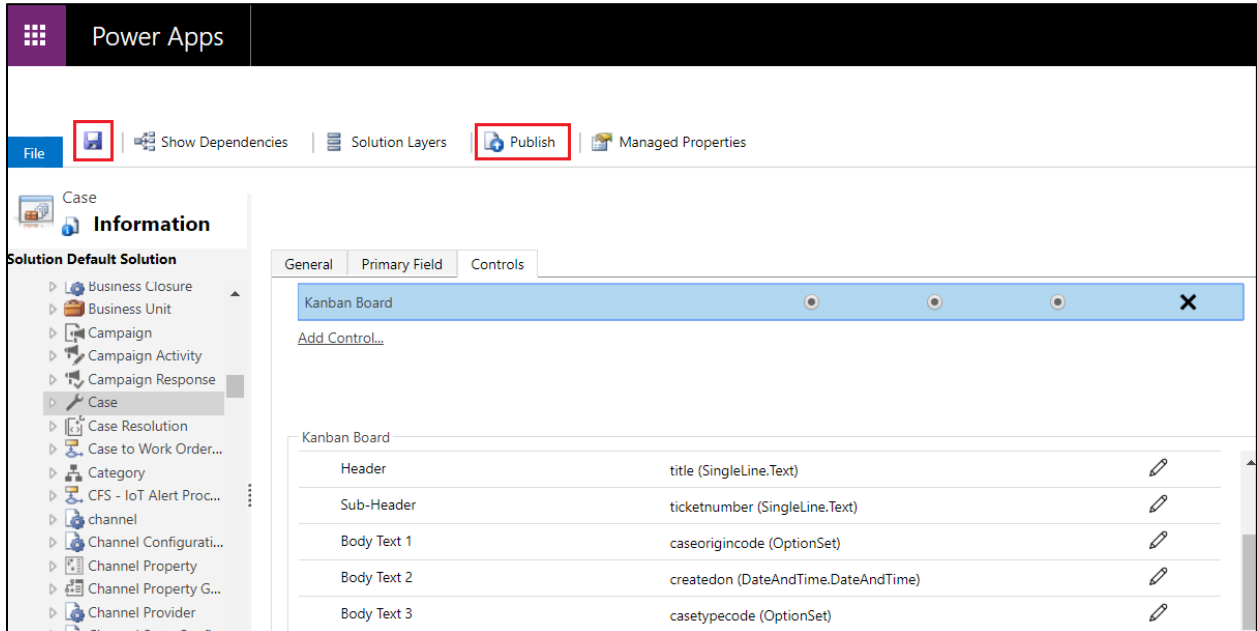
Your control will be now displayed on grid as follows:

1) With Lane filter & Row Grouping based on OptionSet field (Priority), you will get the following view:
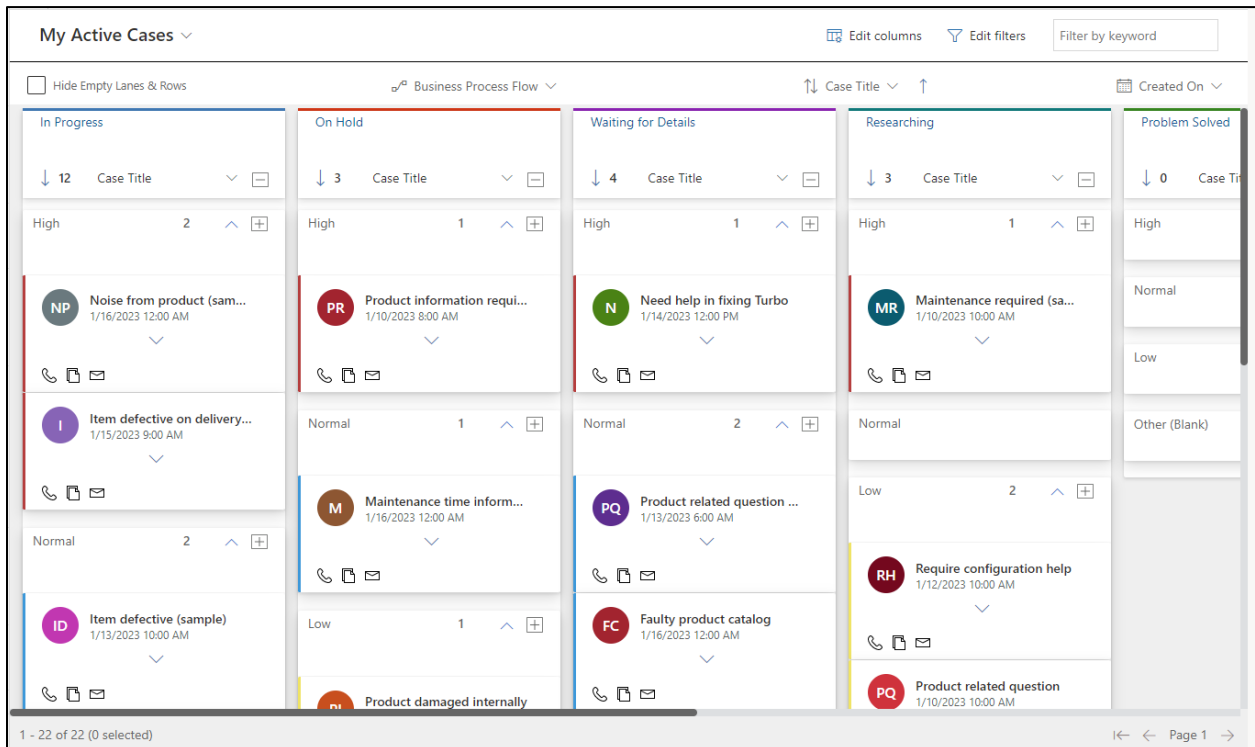
2) With Lane filter & Row Grouping based on Non-OptionSet field (Owner), you will get the following view:

3) With Business Process Flow, you will get the following view:

4) With Aggregate Fields, you will get the following views:
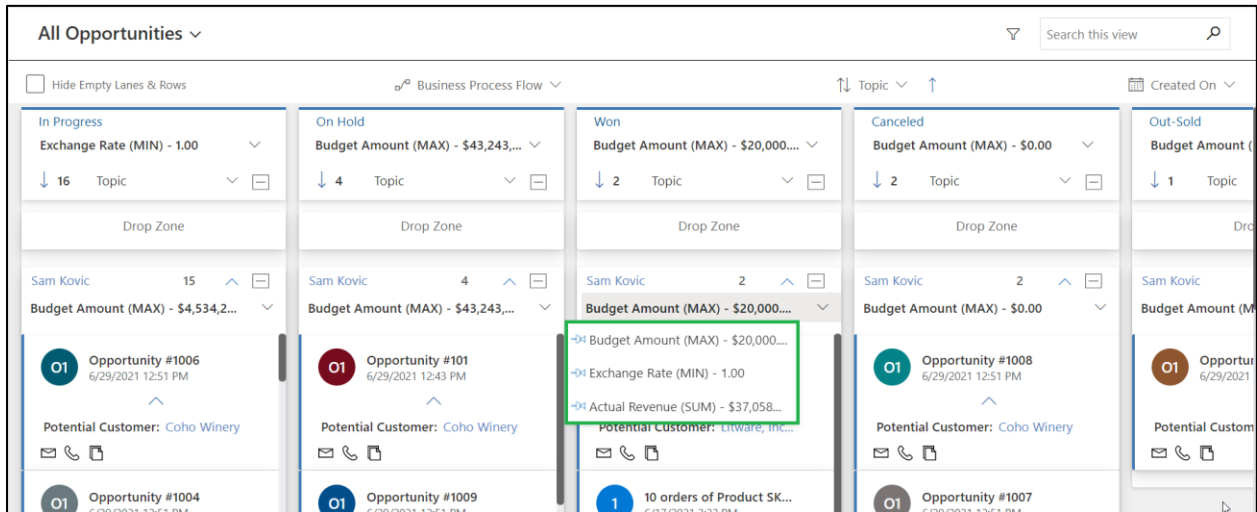   Aggregate field values displayed on lane header

Aggregate field values displayed on row header

If you didn't select any of the Radio Buttons, then for viewing Kanban Board you would have to navigate to Case entity grid → Click on ellipses→ Select 'Show As' → Click on Kanban Board.
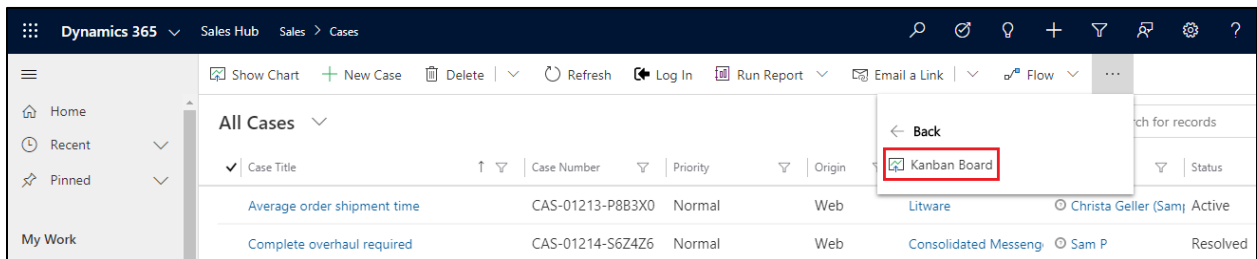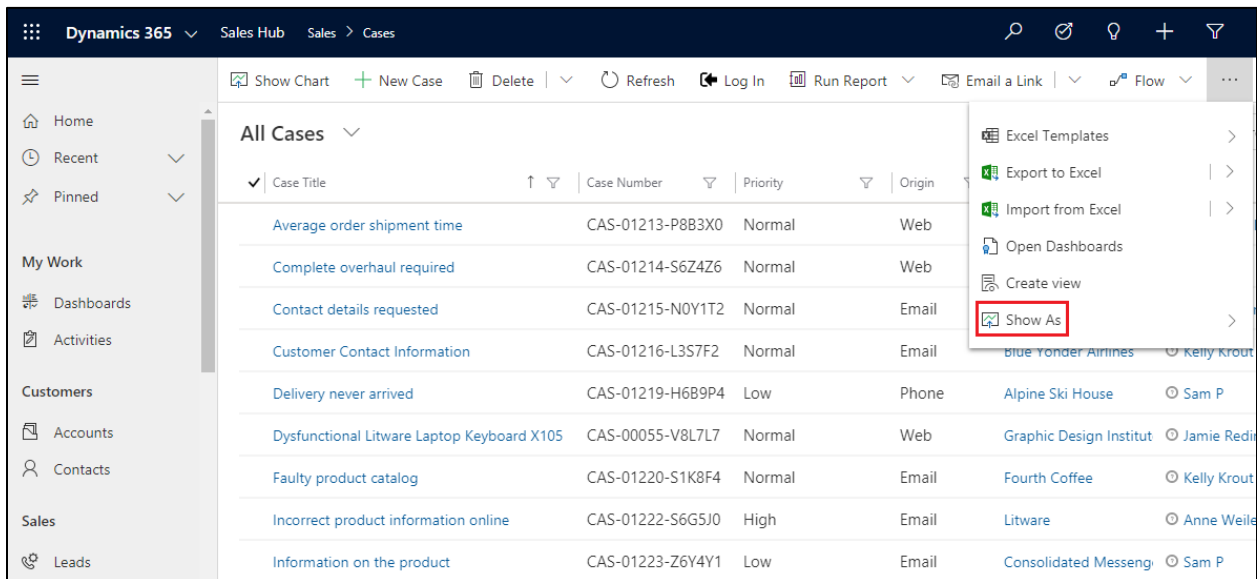
And if you have selected web radio button before Kanban, then to switch back to default grid you would have to follow same step as mentioned above. But this time you would have to select Read Only Grid.
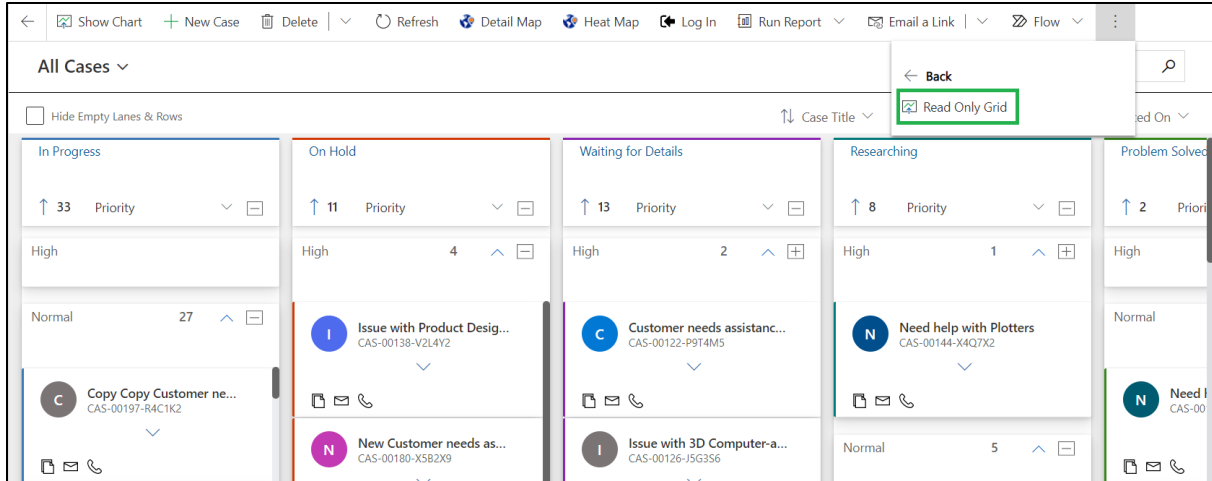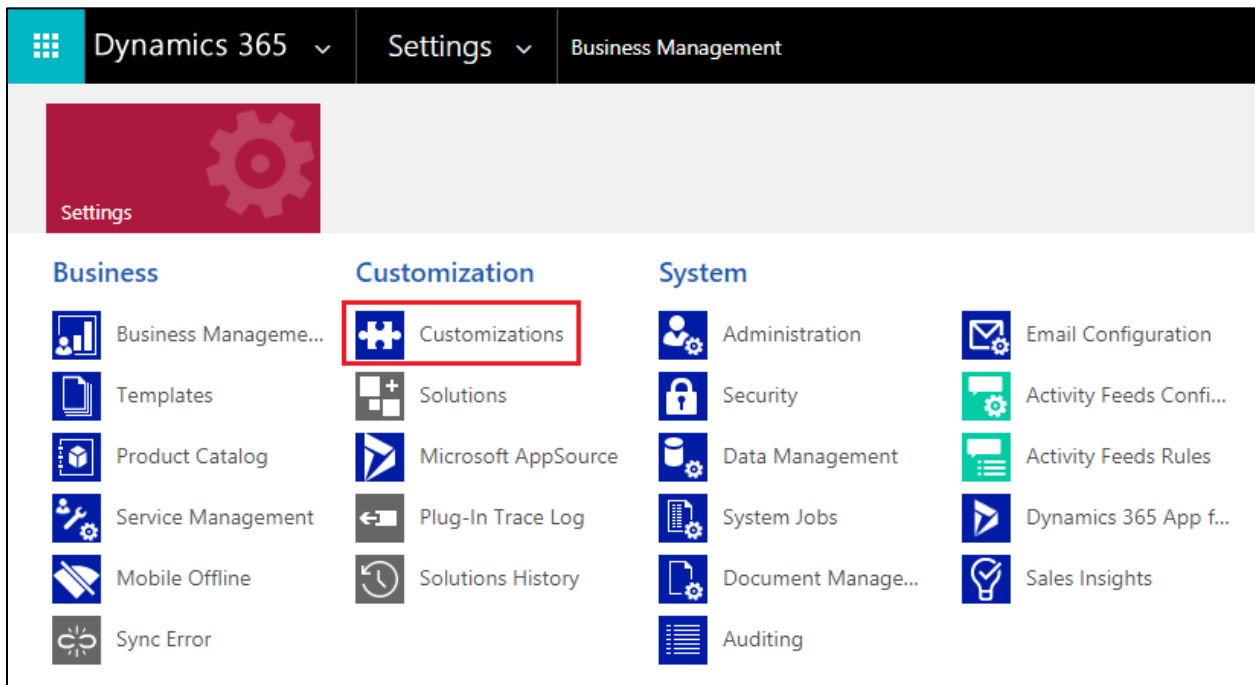
Configuration for Specific View

Apart from this, you can make the Kanban Board available for **certain views in an Entity**. This is possible by adding Data-set Control on Entity Views.

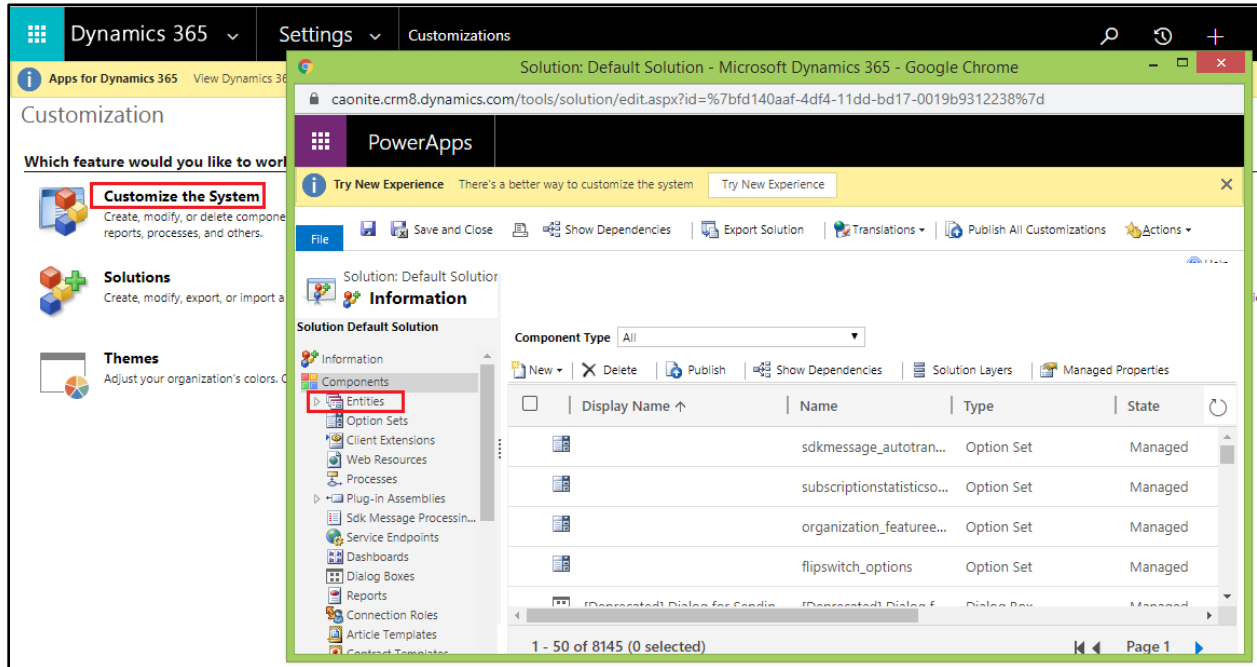To add Data-set Control on Entity Views follow the steps given below:
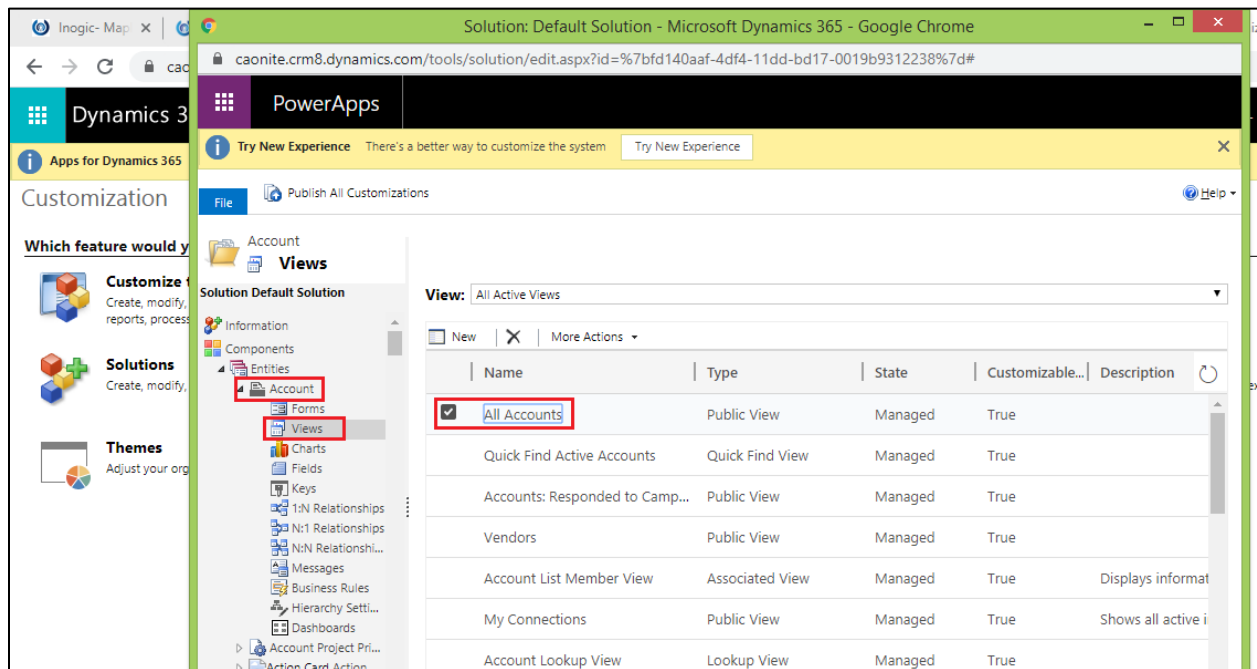
1) Go to Settings → Customizations.

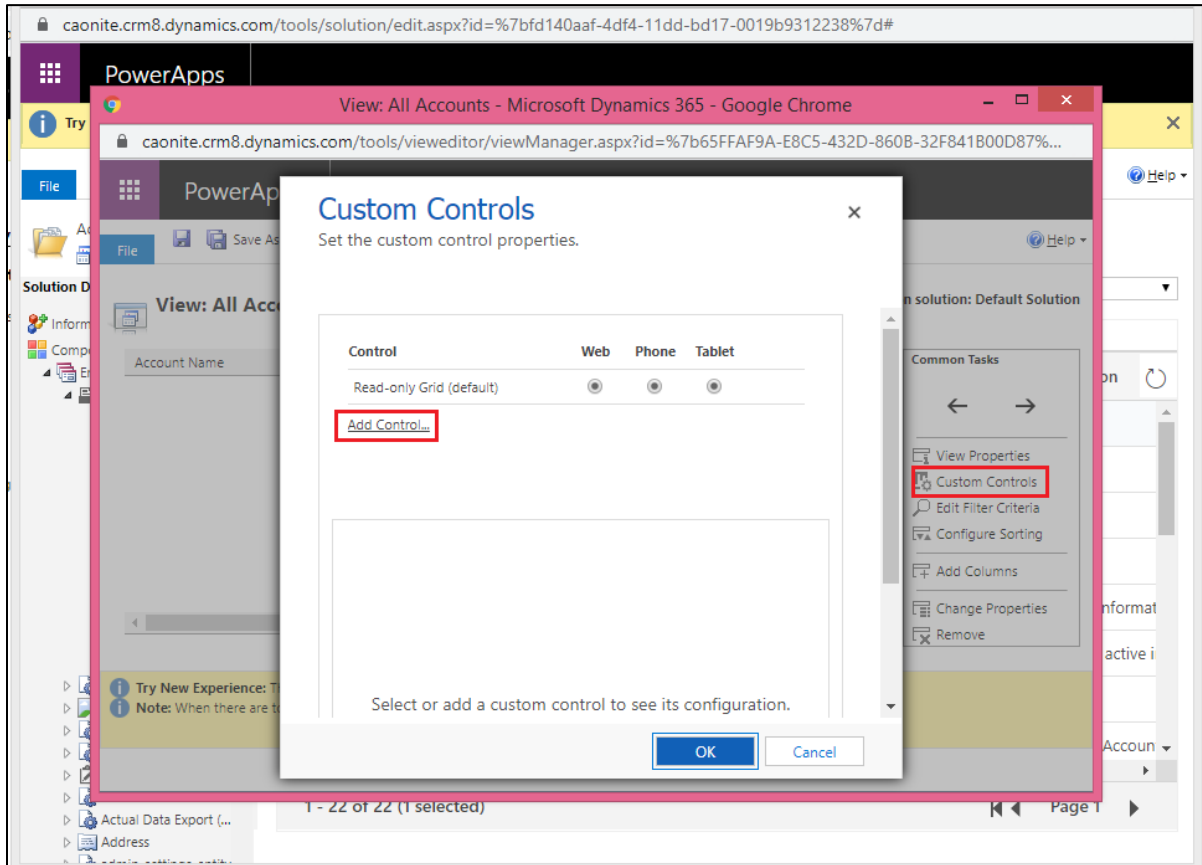2) From there go to Customize the System➔Entities.

3) Next, click on any Entity, for e.g. 'Account' ➔ Views ➔ Click on any view, for e.g. 'All Account'.
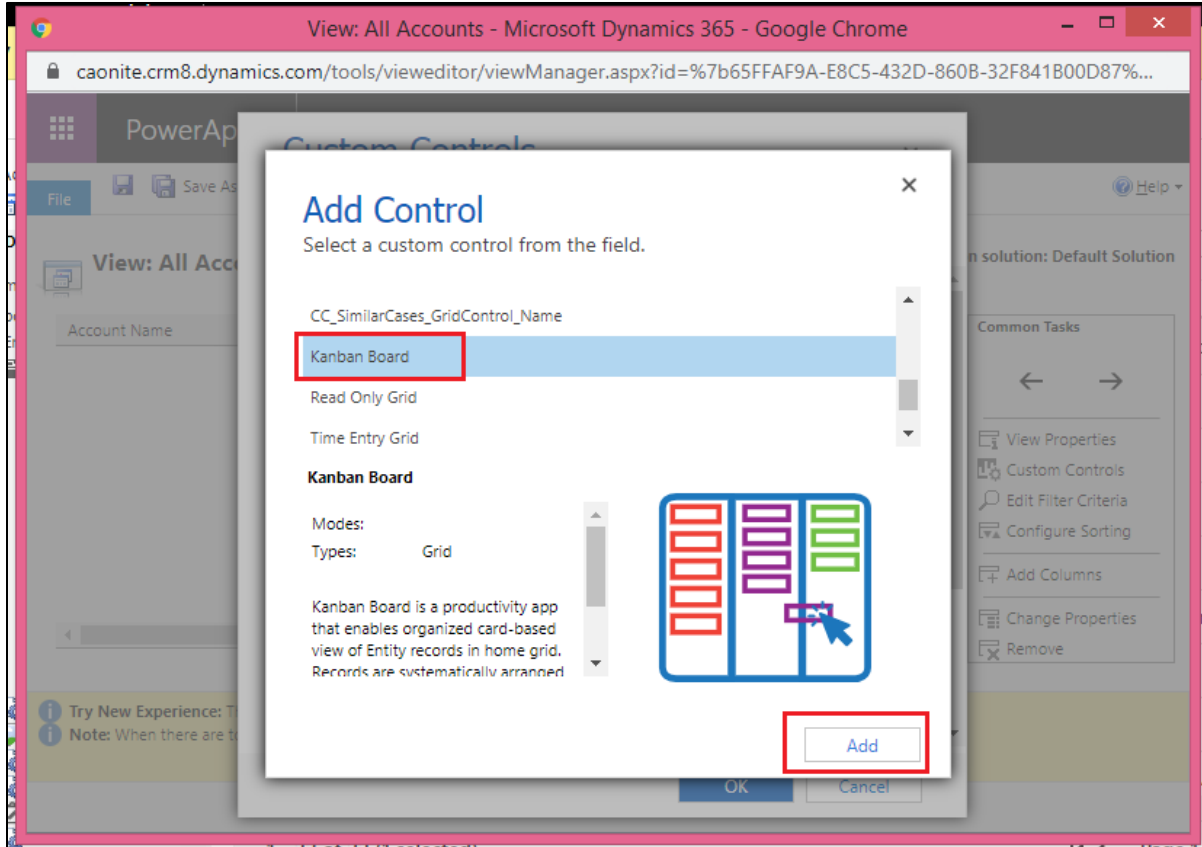
4) In that click on 'Custom Controls' → 'Add Control'.

5) Here a list of Data-set control will be displayed. Select the respective Data-set Control that you want to add i.e. 'Kanban Board' →Click on 'Add'.
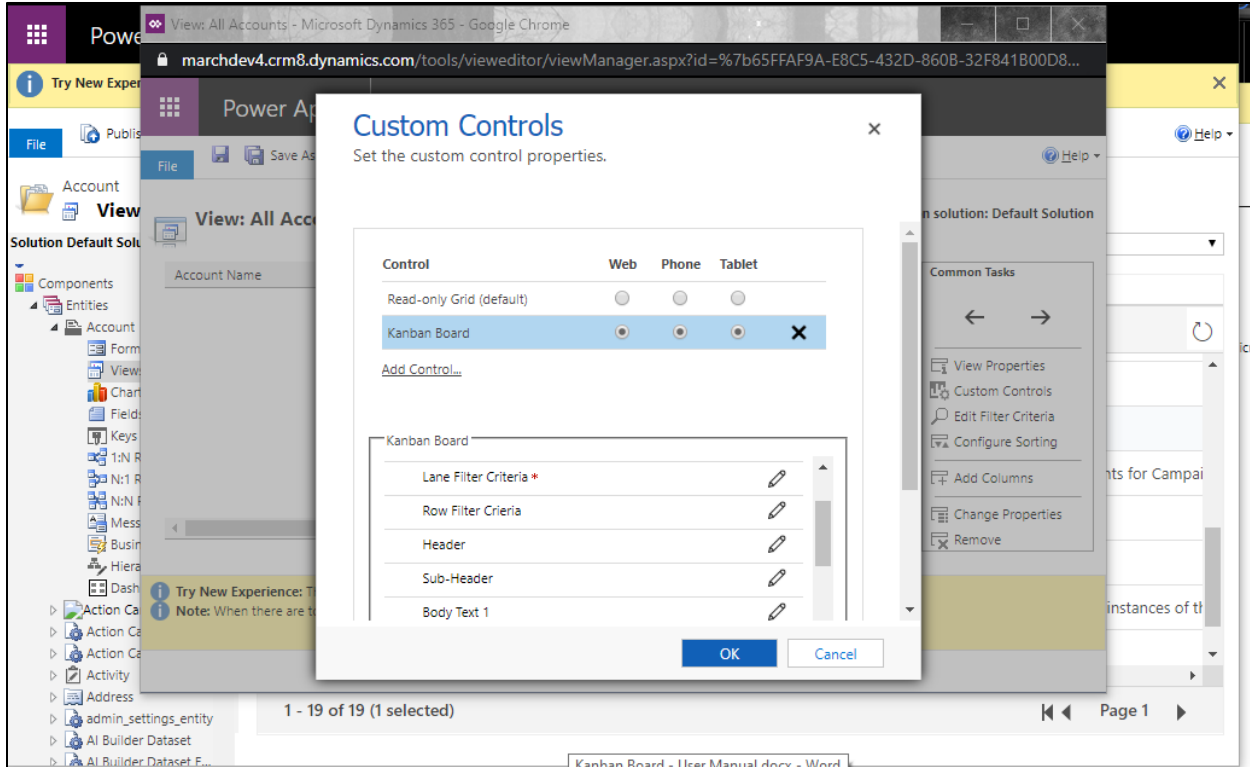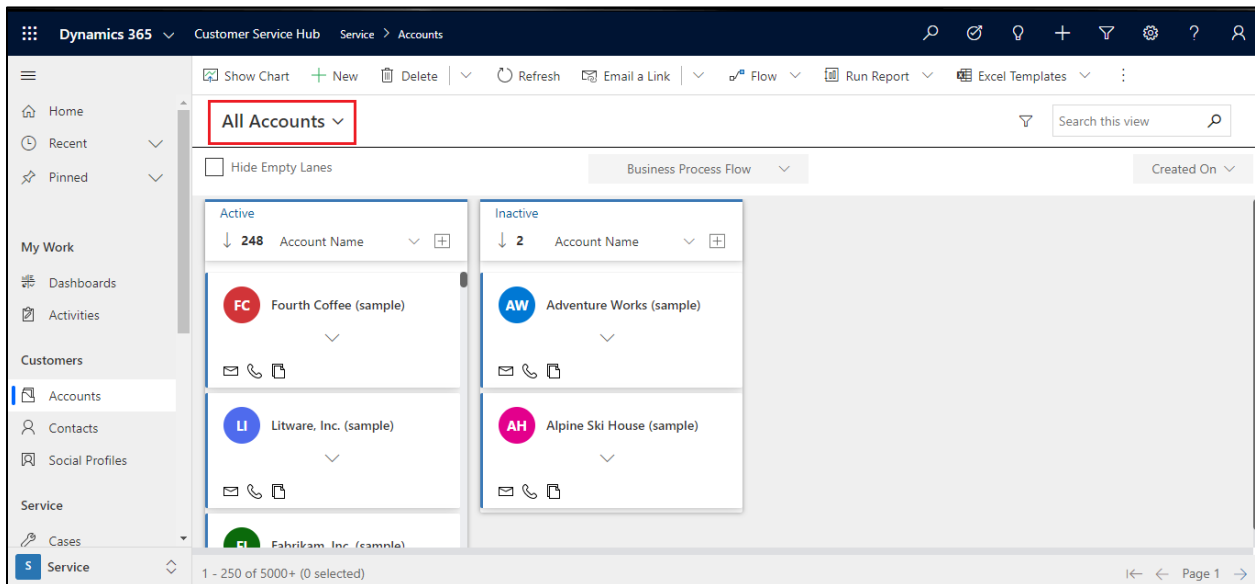
Note: Added control will be available for this view only and not for all views.

6) Next enable Kanban Board for Web, Phone and Tablet.

7) Now it will be shown to only the specific view 'All Accounts'.

Configuration for Subgrid
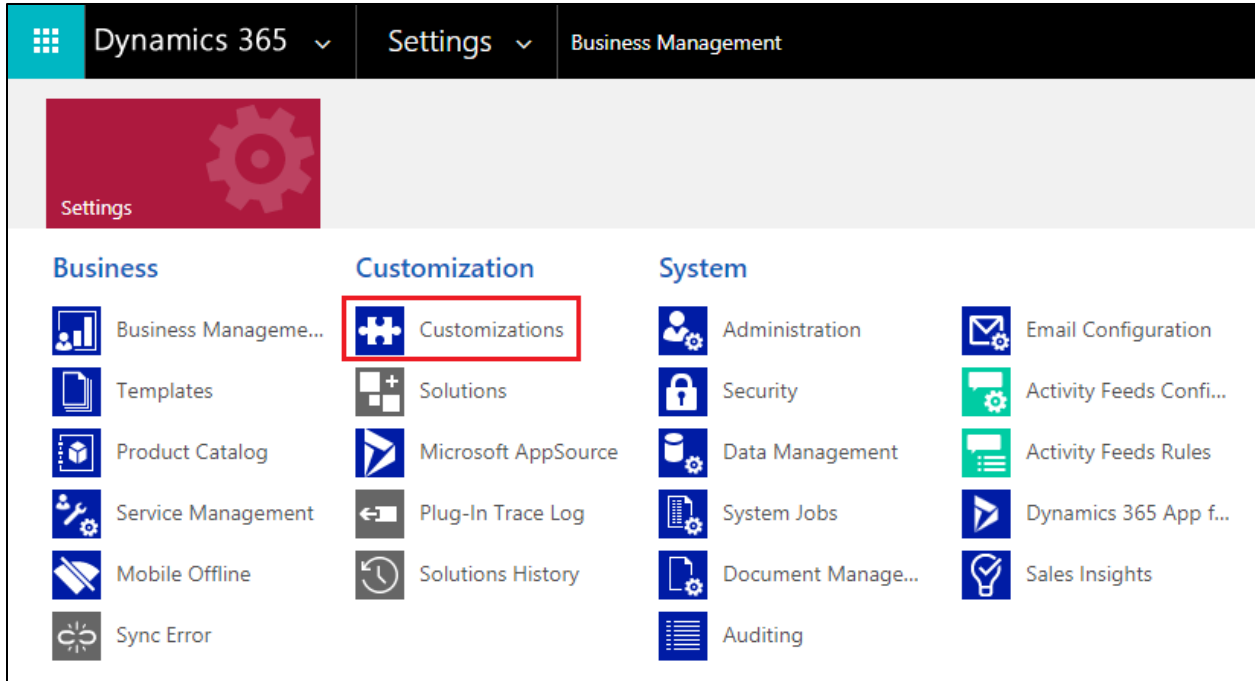
Similarly, you can make the Kanban Board available for **subgrid**. This is possible by adding Kanban Control on **Form.**

To add Kanban Control on Subgrid follow the steps given below:

1) Go to Settings → Customizations.

2) From there go to Customize the System→Entities.
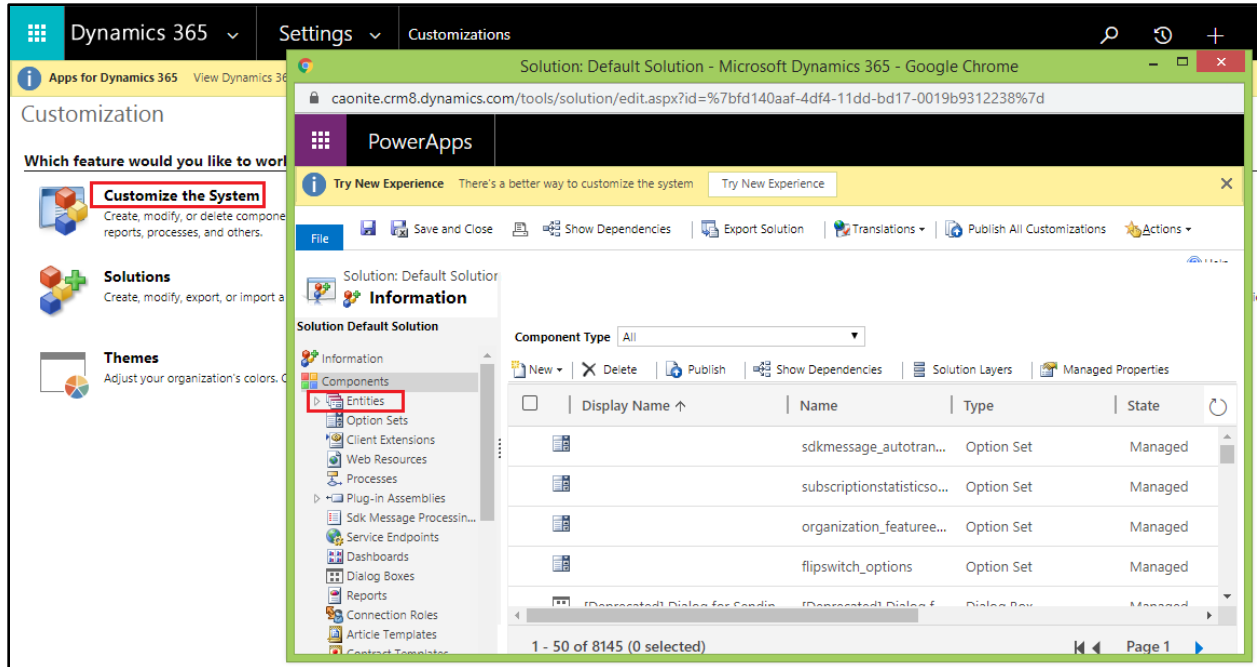
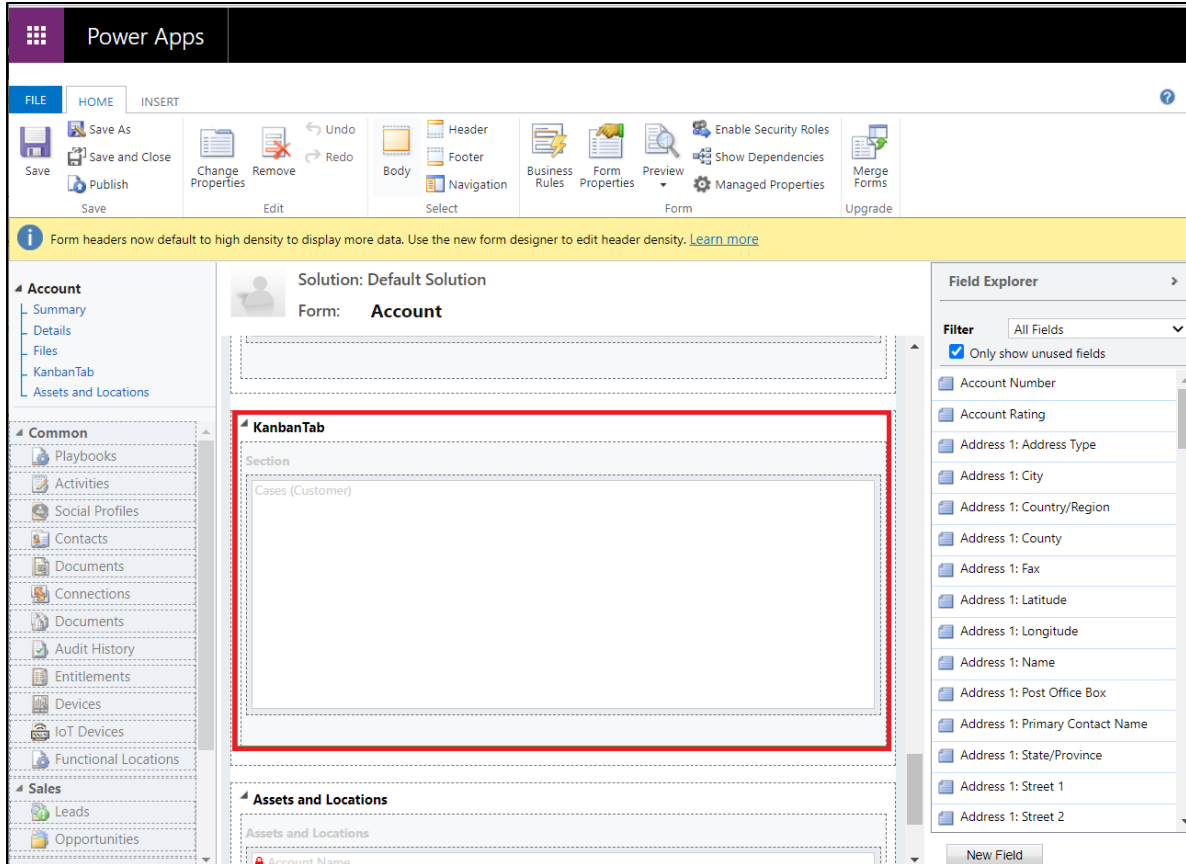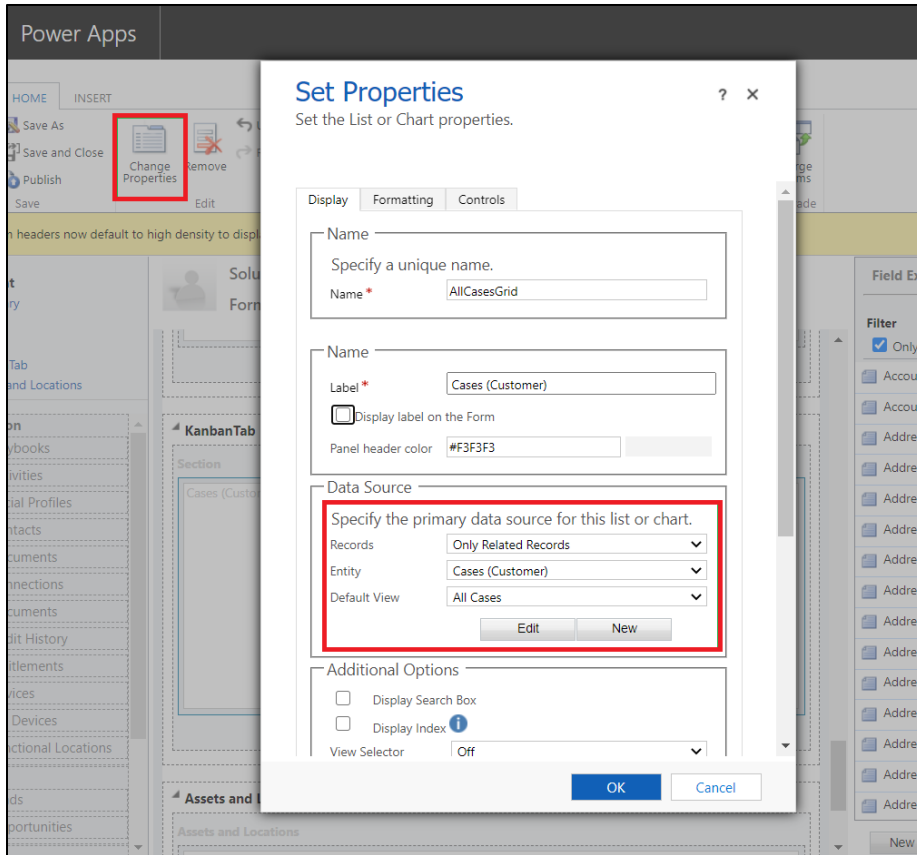3) Next, click on any Entity, for e.g. 'Account' → Form → Select 'Account'.
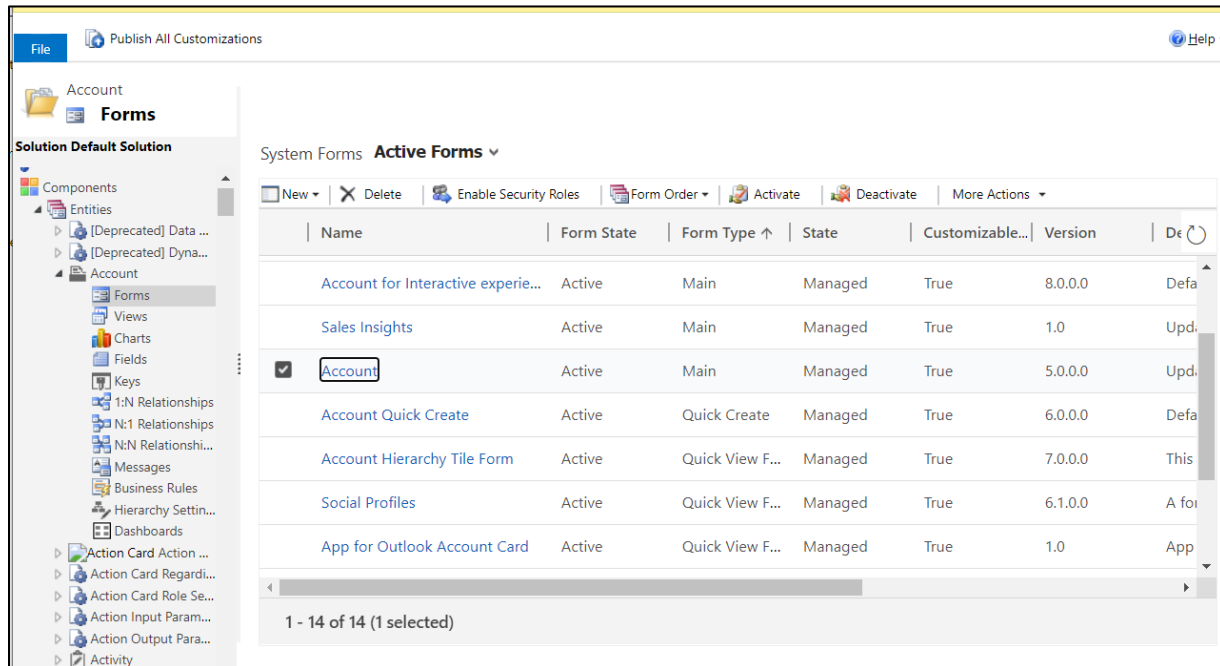
4) Here, add new tab on the form.

5) Now select the tab →Click on 'Change Properties' → Go to 'Display' → Select the required details.

6) Next go to 'Controls' → Enable Kanban Board for Web, Phone and Tablet.
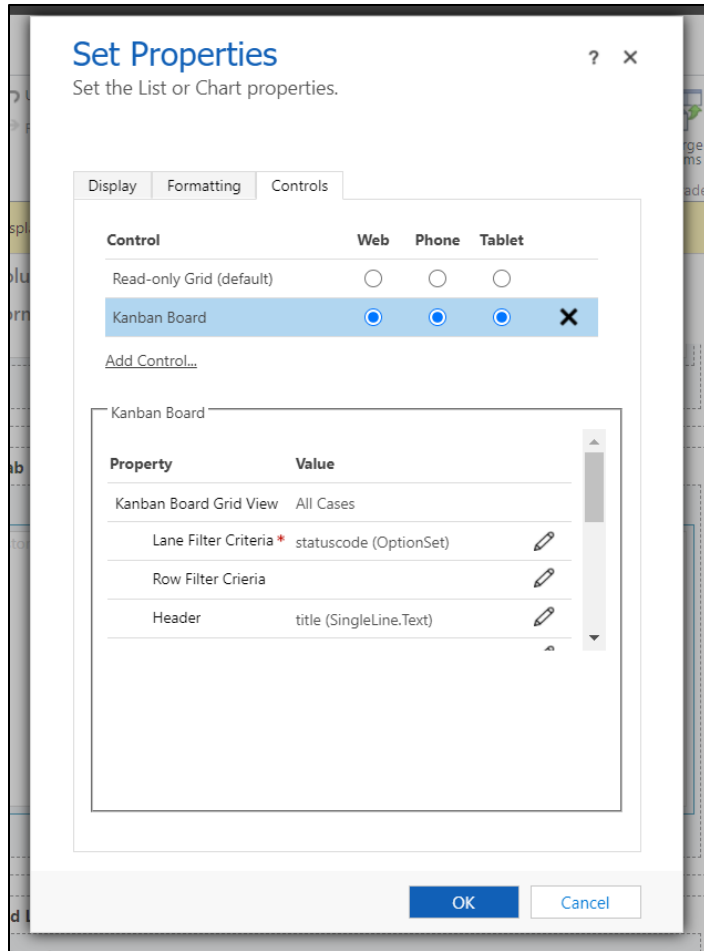
7) Now it will show the related cases of a particular record in Kanban View.
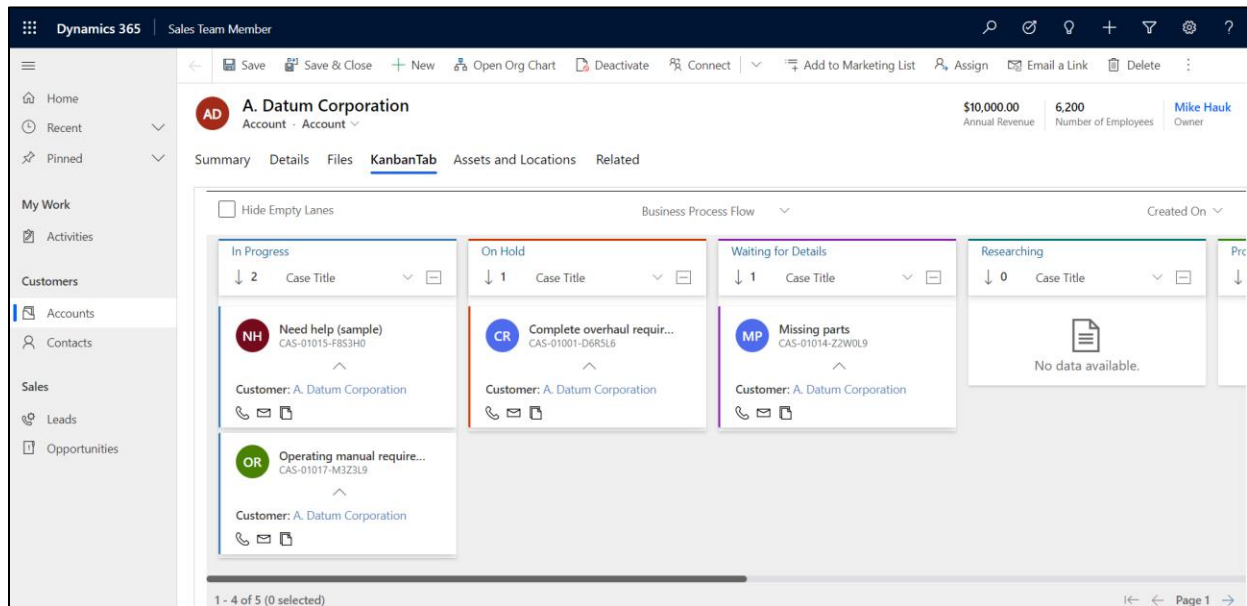
Configuration for Personal View

In a similar way, Kanban Board can be configured for **Personal Views** created by the users.

To add Kanban Control on **Personal View** follow the steps given below:

1) Go to Advanced Find → Select the personal view to which Kanban Control is to be added.
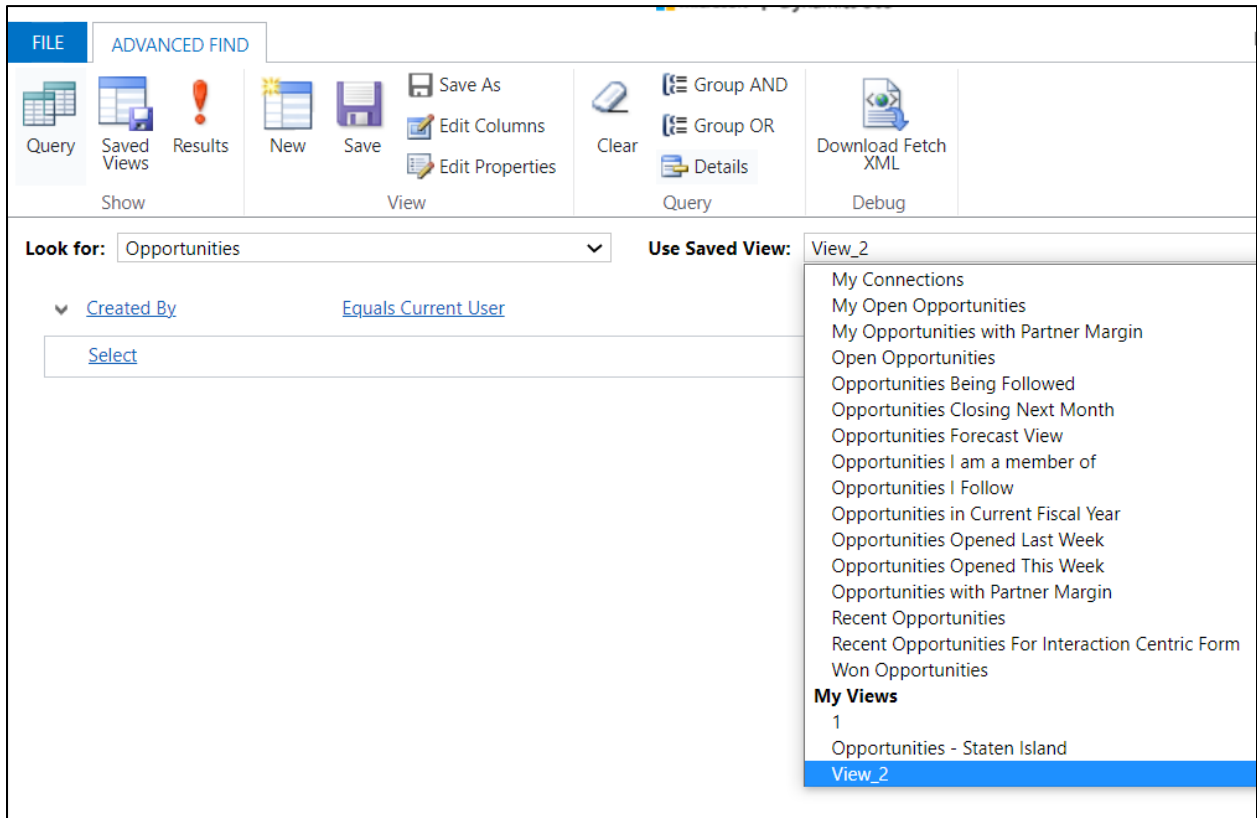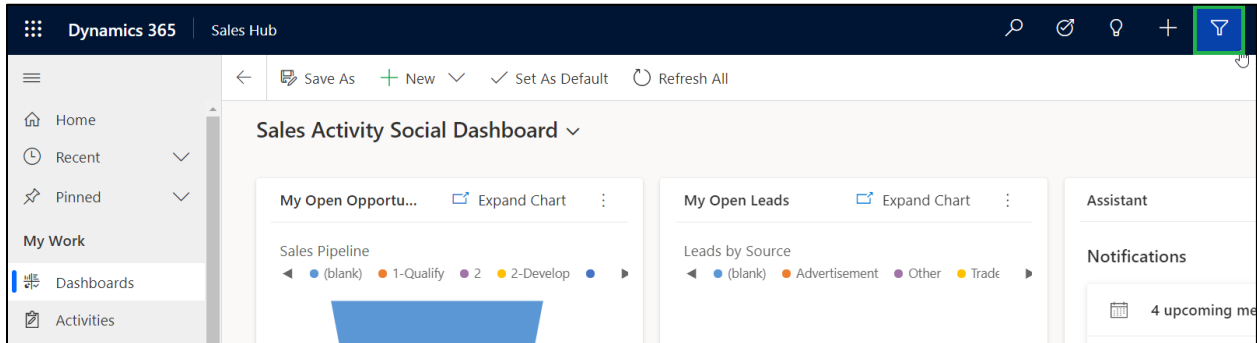
2)   Click on 'Edit Columns'.
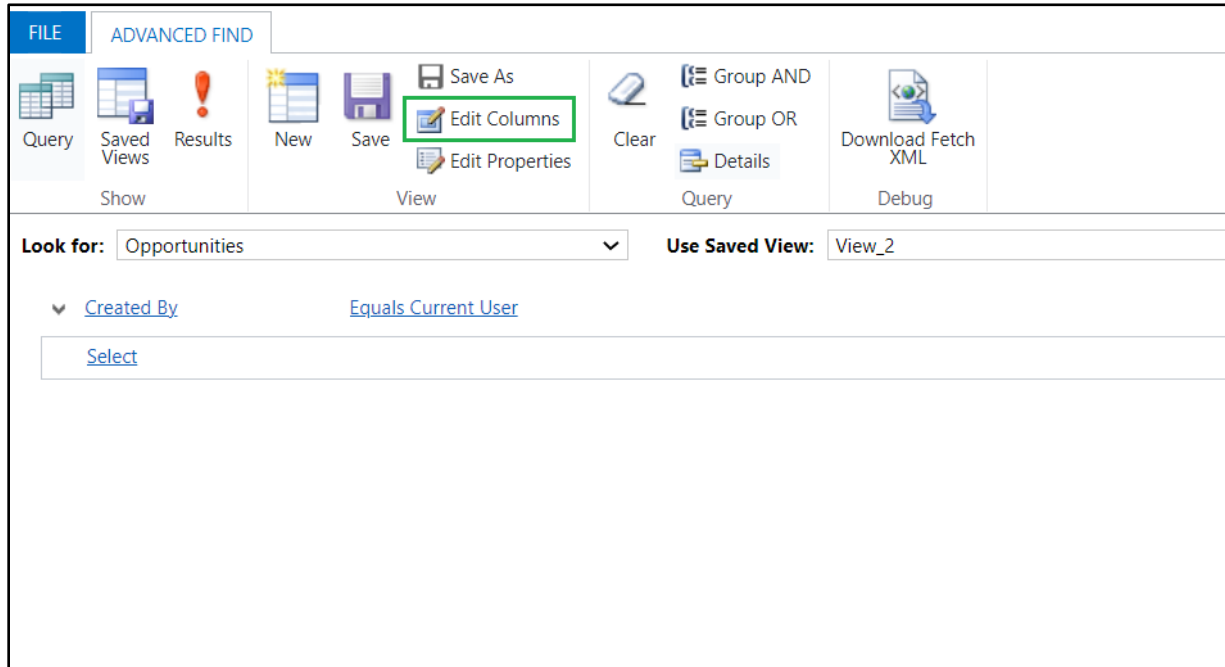
3)   Click on 'Custom Controls'.
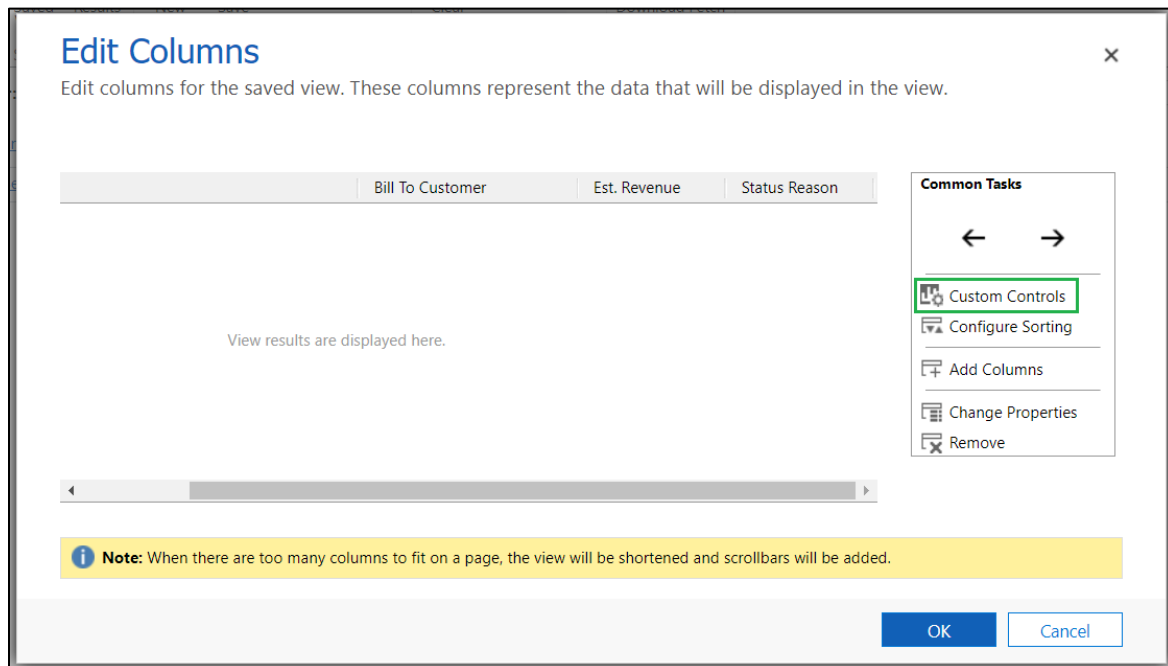
4)   Click on 'Add Control'.

5) Select 'Kanban Board' → Click on 'Add'.

6) Now configure the Kanban Board as per your requirement → Click on 'Ok'.
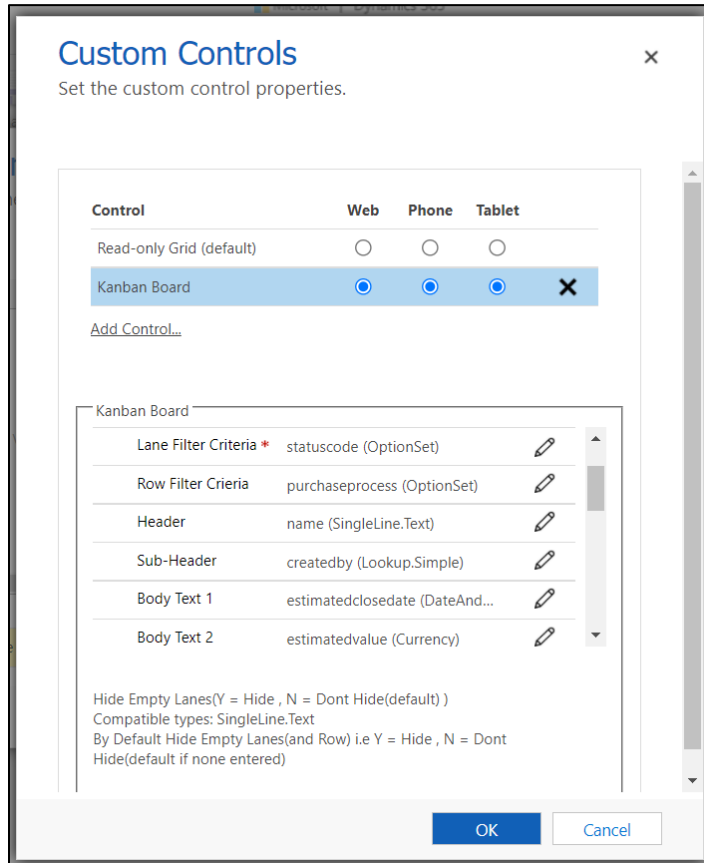
7) Again click on 'Ok' → Then click on 'Save' to add the control to the personal view.
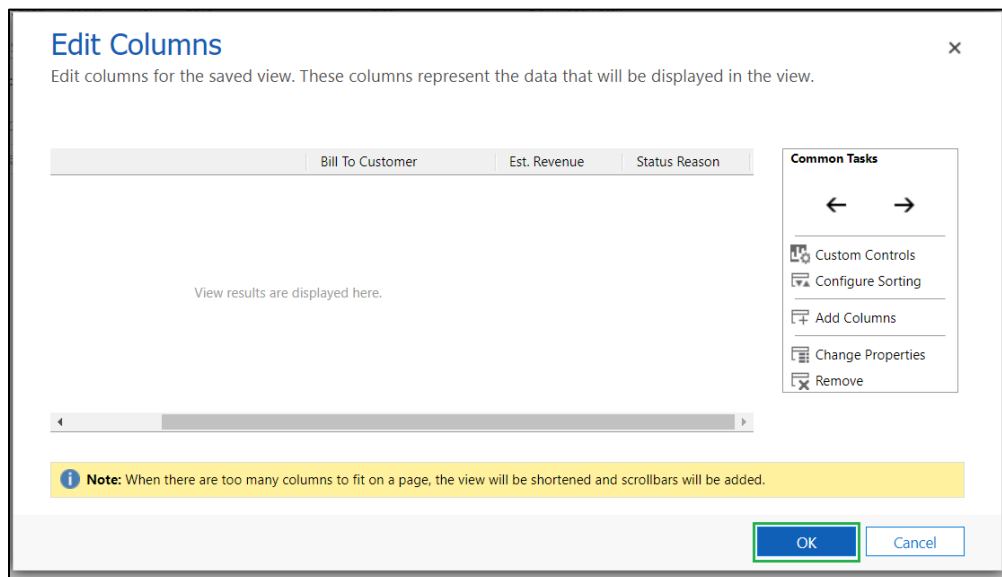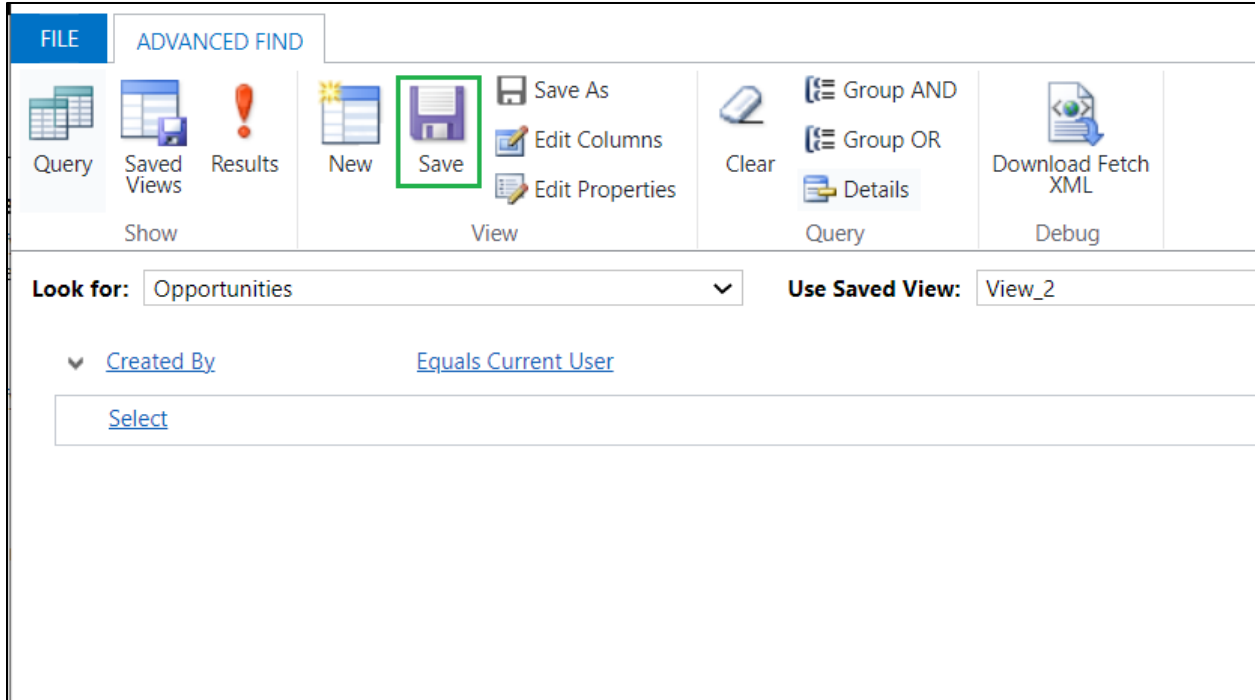
8) Now the personal view will be displayed in Kanban View.
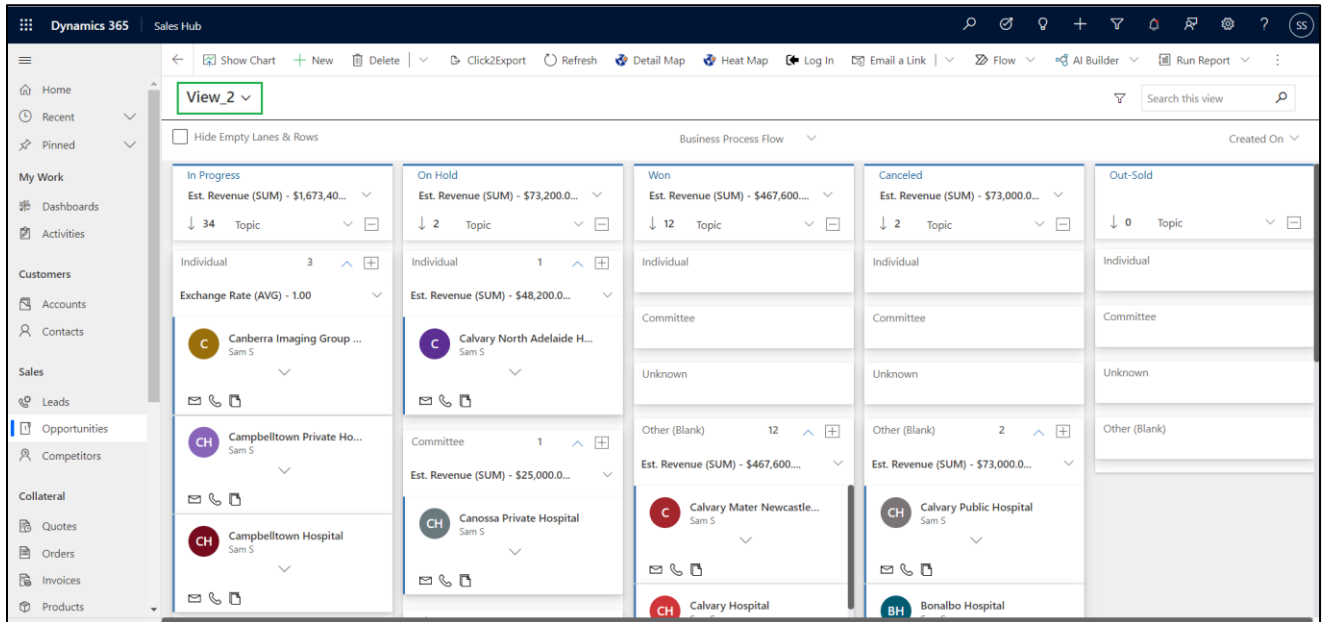
Configuration for Auto Refresh

Kanban Board gives provision to automatically Refresh Kanban Board based on a set interval. This is possible by configuring the '**Auto Refresh'** property in Kanban Board control.

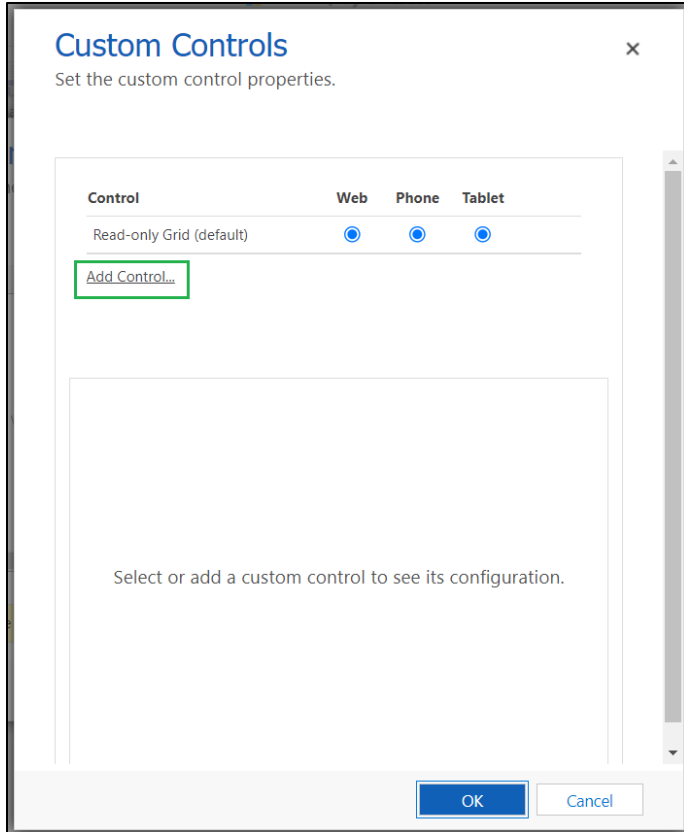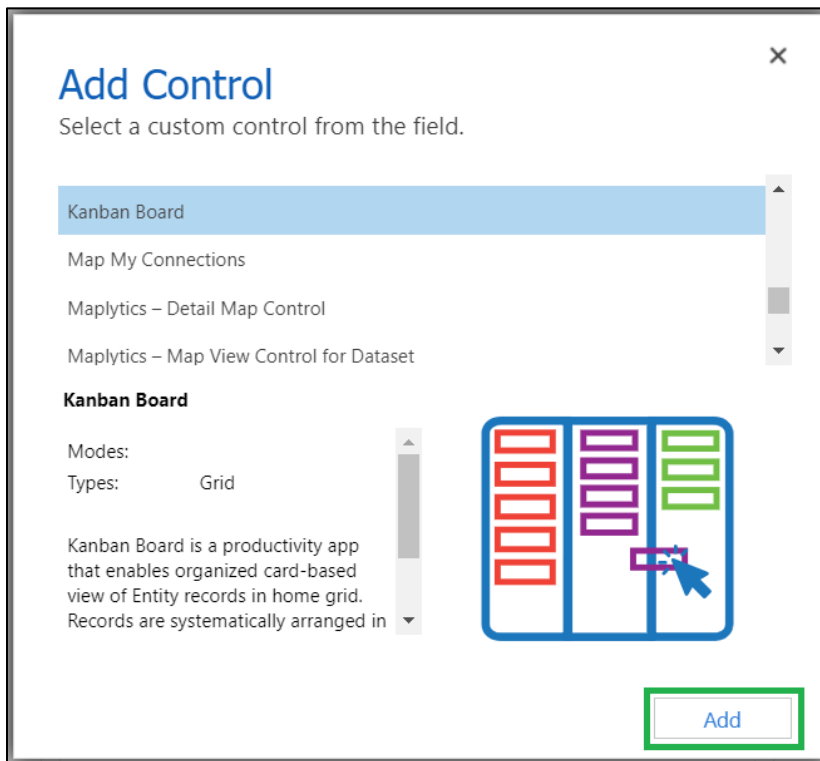To configure Auto Refresh control for Kanban Board follow the steps given below:

- Navigate to **Settings --> Customizations --> Customize the System** go to the entity where Kanban Board Control has been configured and Select '**Kanban Board'** control to configure '**Auto Refresh'** and '**Refresh Interval'** properties.
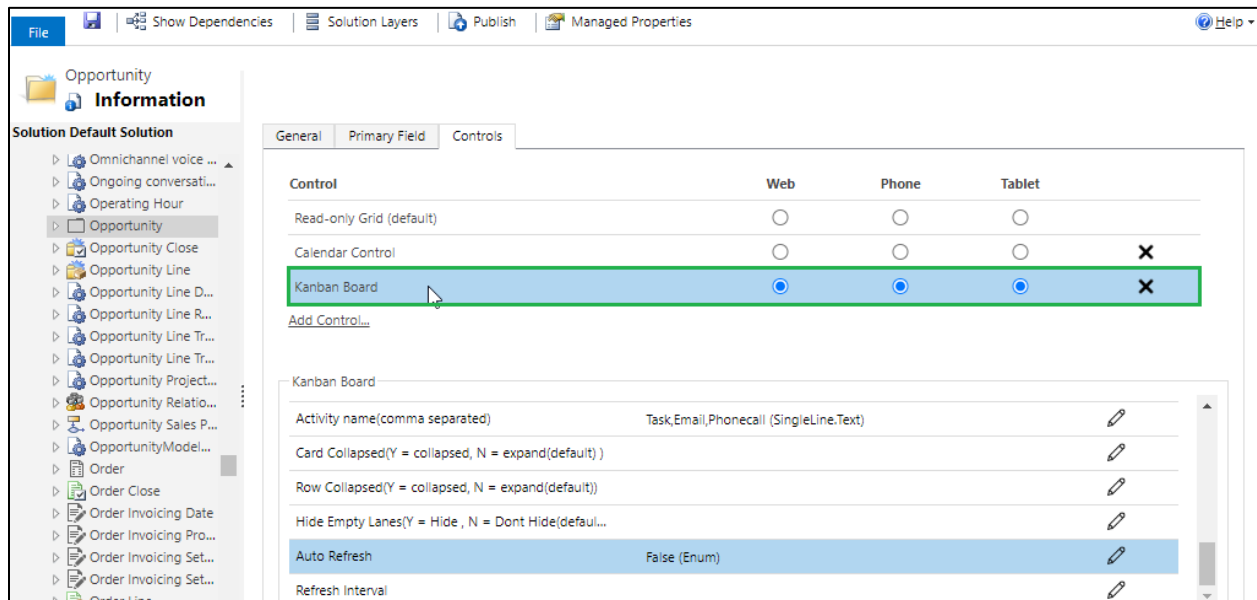
- To Configure '**Auto Refresh Property'** Click on **'Edit' icon.**
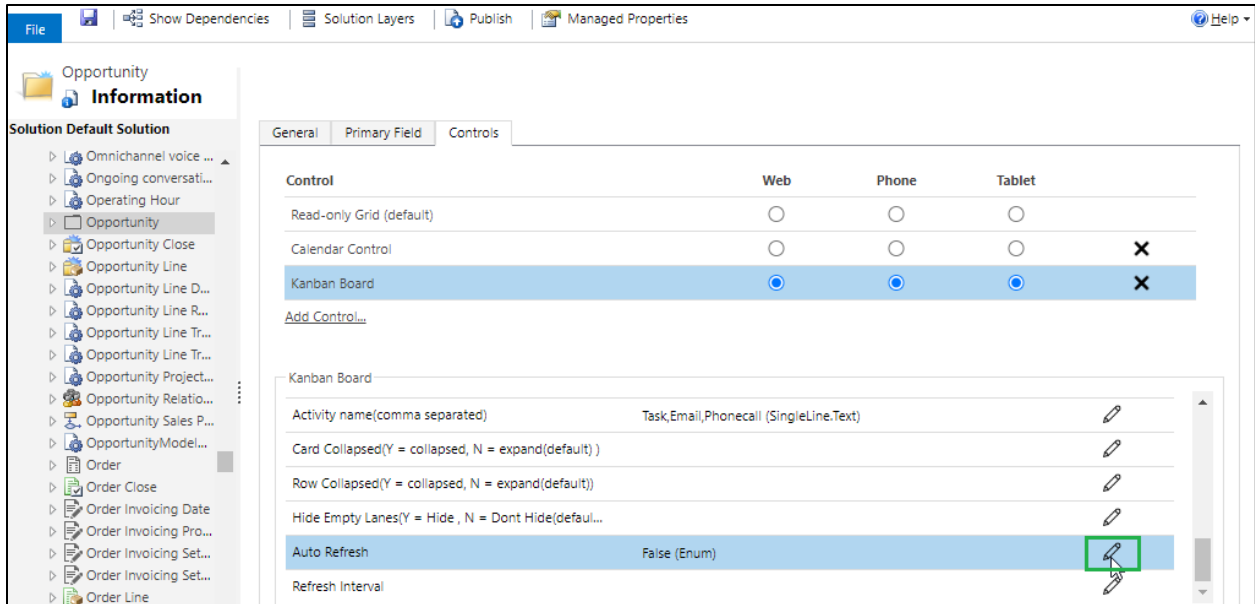
- Set Auto Refresh Control as **'True'** and Click on **'OK'.**
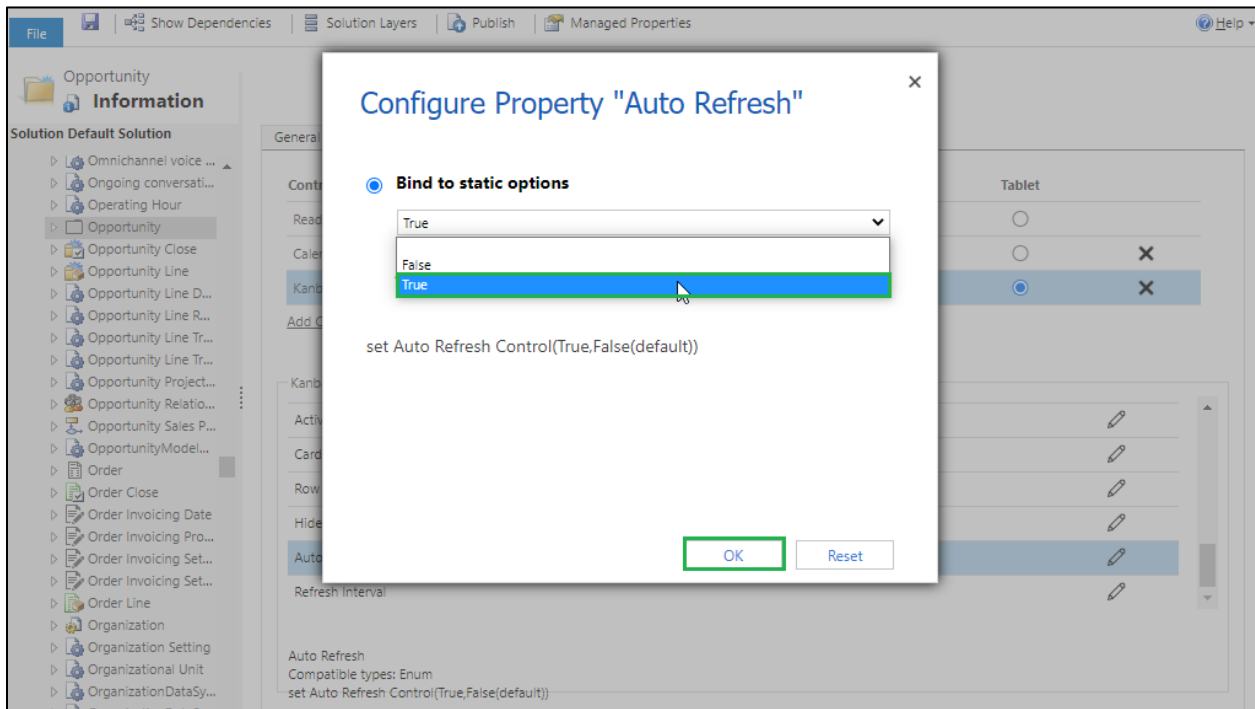
- To Set Auto Refresh Interval Click on **'Edit' icon.**
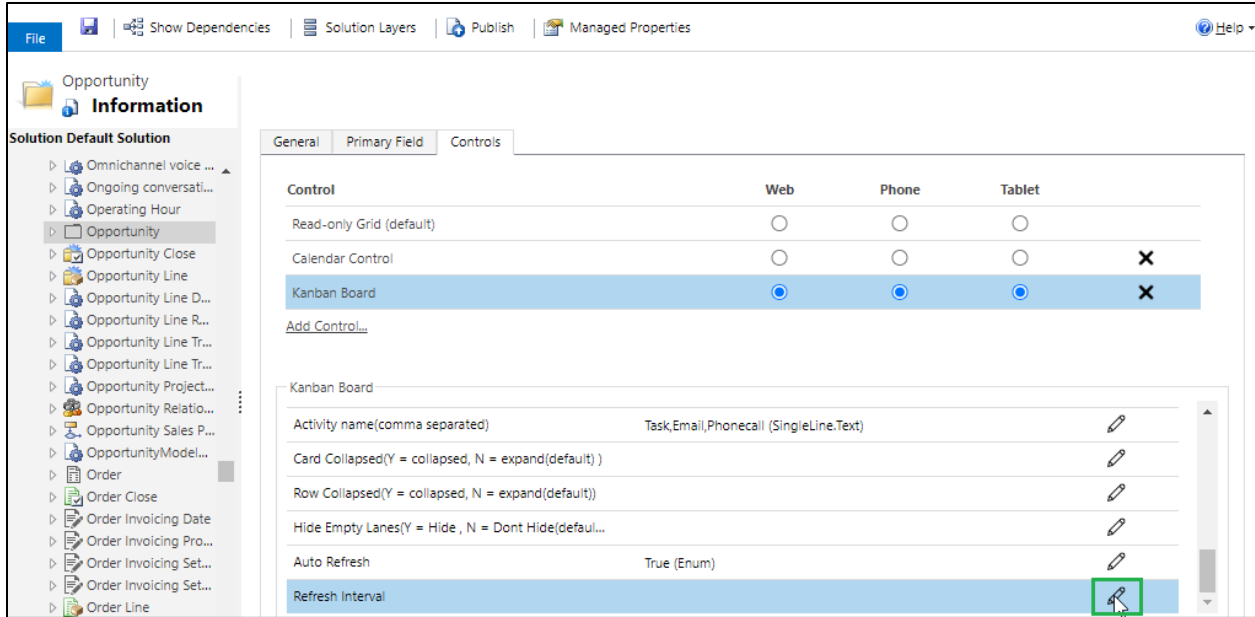
- Set default interval time for automatically refreshing the Kanban Board and **Click** on **'OK'**. For e.g. If you set the value to 20 minutes, then Board will automatically refresh every 20 minutes.
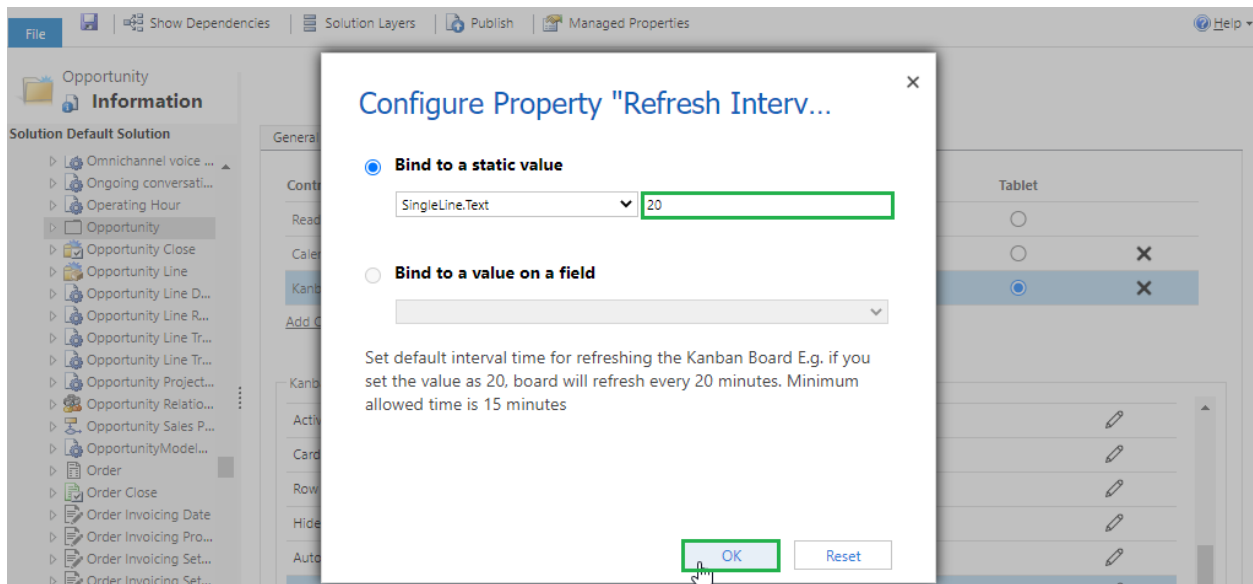
NOTE: *Minimum allowed time for refreshing the Kanban Board is 15 minutes.*

- Click on **'Save'.**
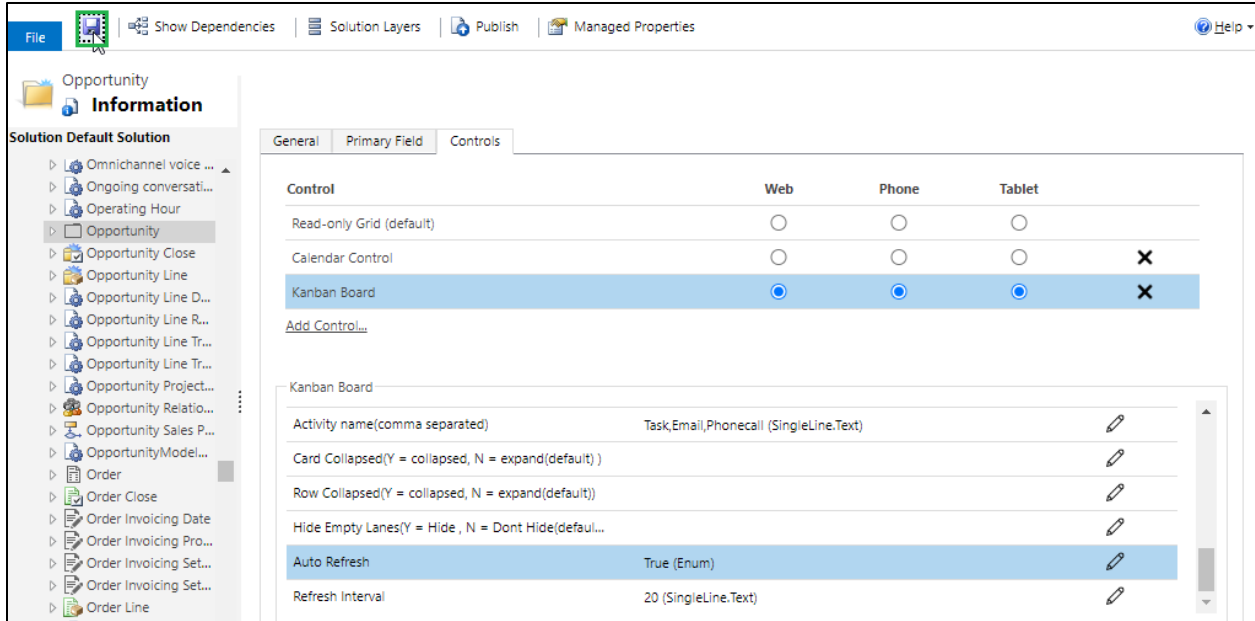
- Click on **'Publish'.**
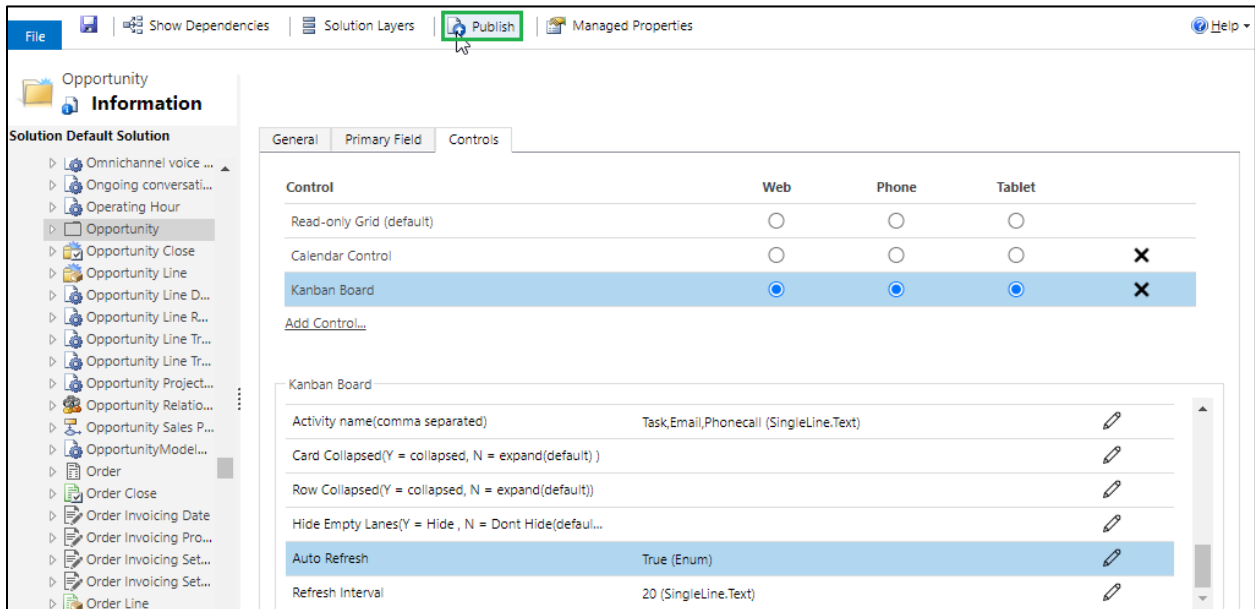
- **Go to** entity view for which you have configured the Auto Refresh Property, and Click on **'Refresh'.**

NOTE: After configuring Auto Refresh Property you need to at least once manually refresh the Kanban Board and then it will start to auto-refresh based on the set interval.
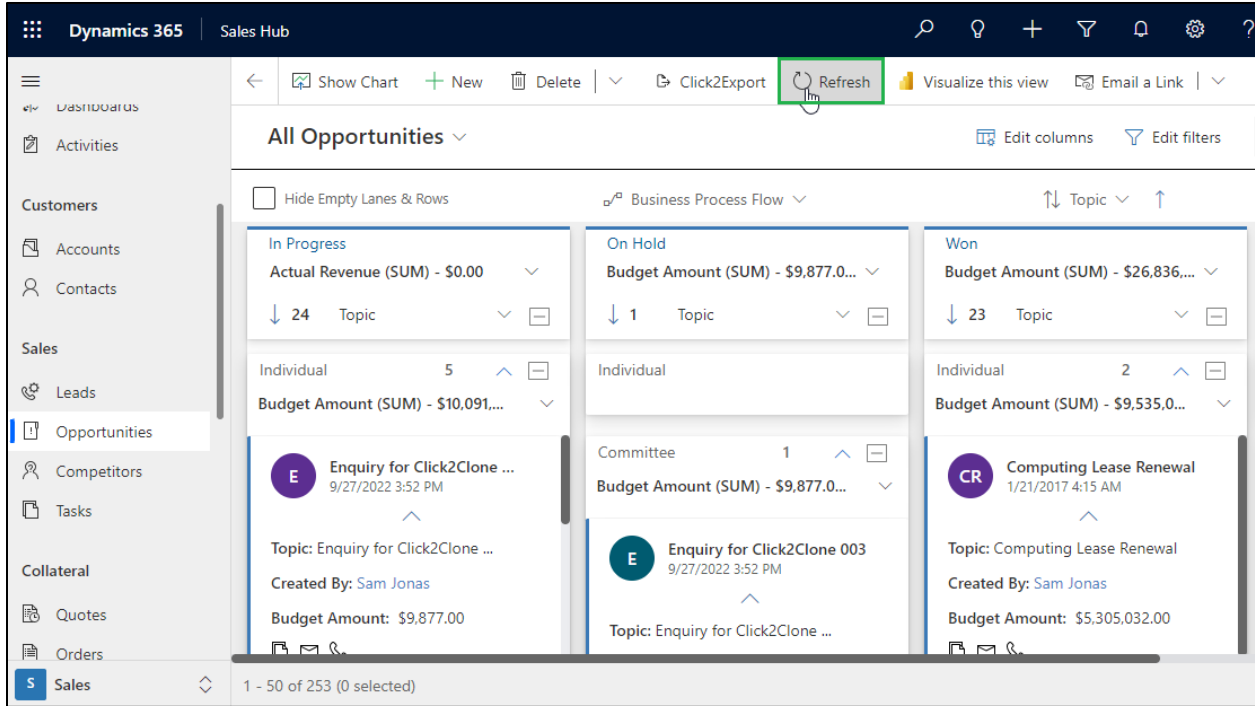
Kanban Board Features

Kanban Board provides an organized view of records on home grid. Its various features helps to systematically organize records as per requirement. Let's have a look at these features of Kanban Board:

1. BPF (Business Process Flow) Support

Organize and categorize records of a given entity in Kanban view as per the Business Process Flow defined for that entity. Here, 2 pins will be seen besides each of the Business Process Flow.

- The dark blue pin is the Global pin. The BPF on which Global pin is used will be pinned for all the users using Kanban Board.
- The white pin is the Personal pin which is used for pinning BPF for a specific user. The BPF on which Personal pin used by a particular user, say User A, will be pinned only for that user.
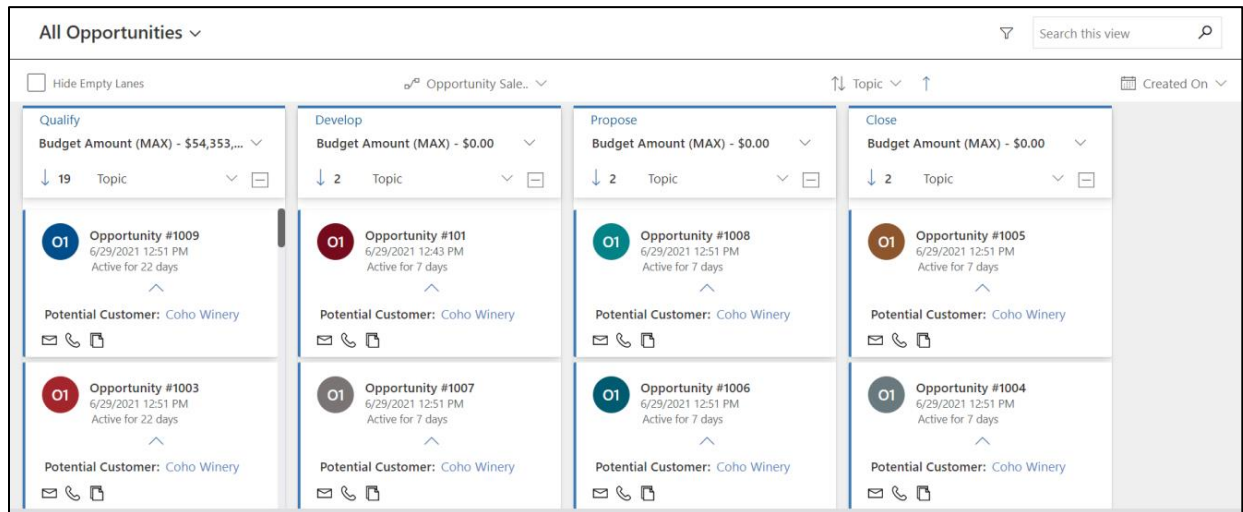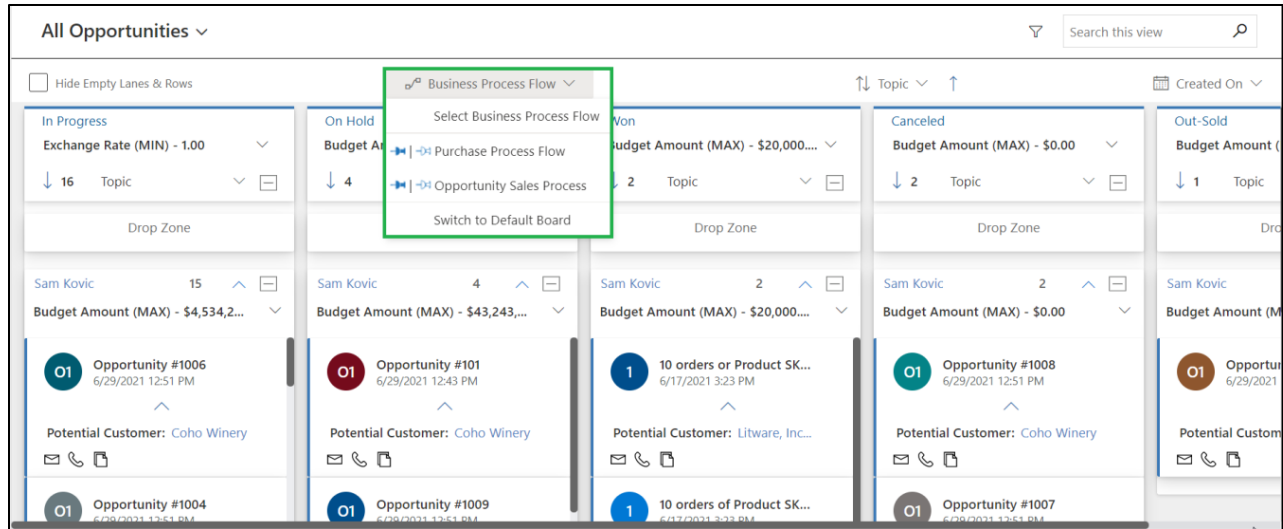
Click on 'Switch to Default Board' to switch the Kanban Board to Default Board.
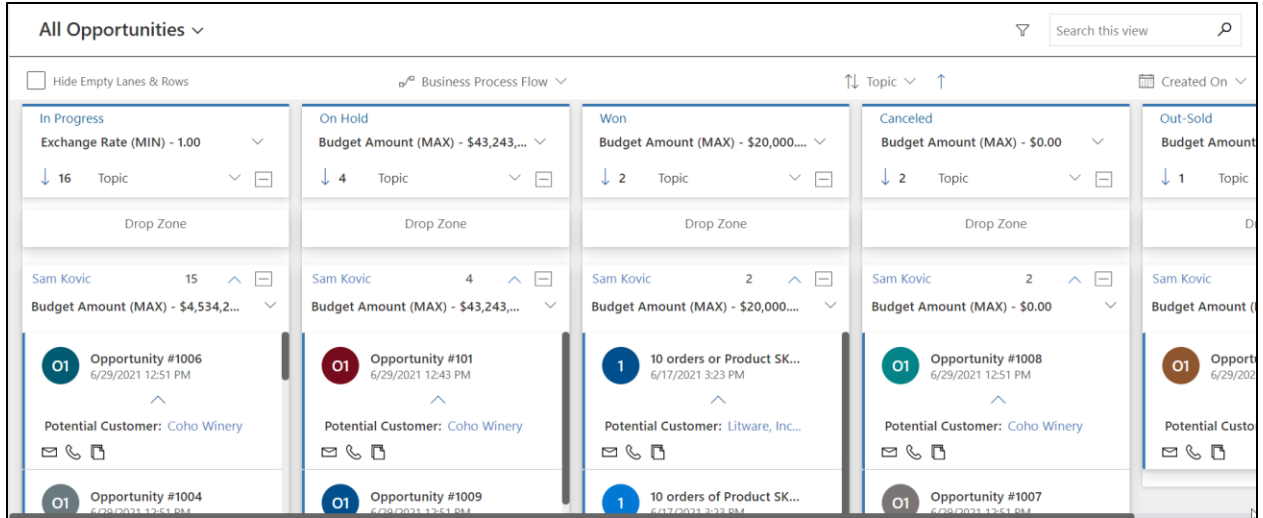
This field is by default enabled. You can disable/enable this field while configuring the Kanban View Component for a view as shown below:
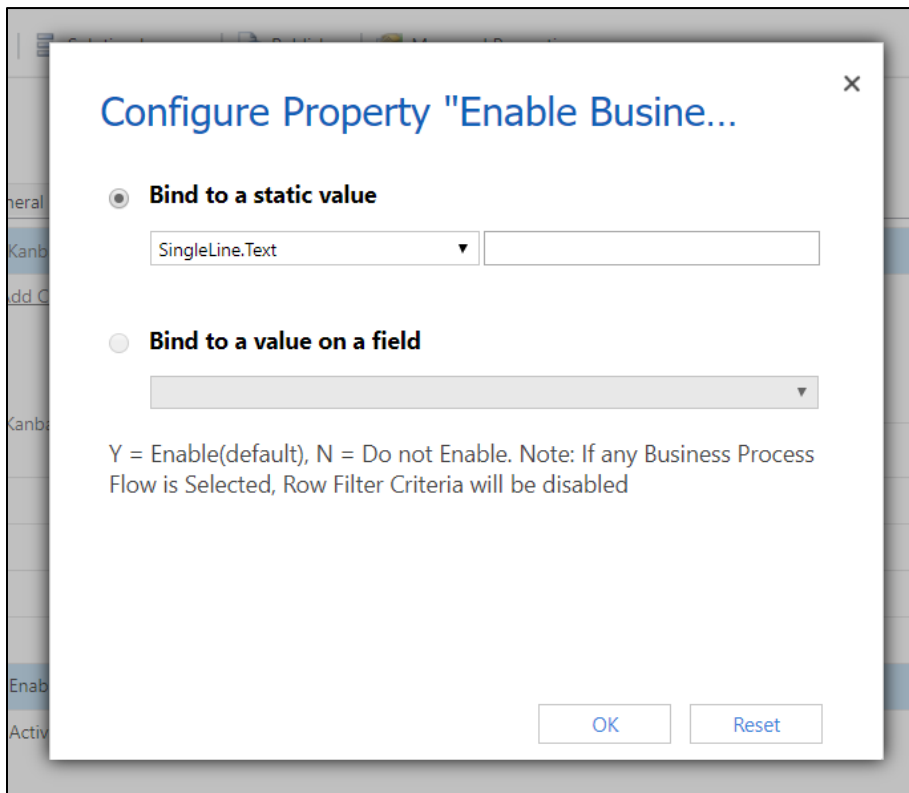
2. Row Grouping

Categorize and group records in row based on any field value. For example depending upon on priority – High, Normal, Low.

The cards (records) can be dragged and dropped from one row to another. As a result, the field of that record is updated in both lane & row.

You can also expand / collapse these rows through a toggle icon beside the row title and through the icon beside lane header you can toggle all the rows in a lane.
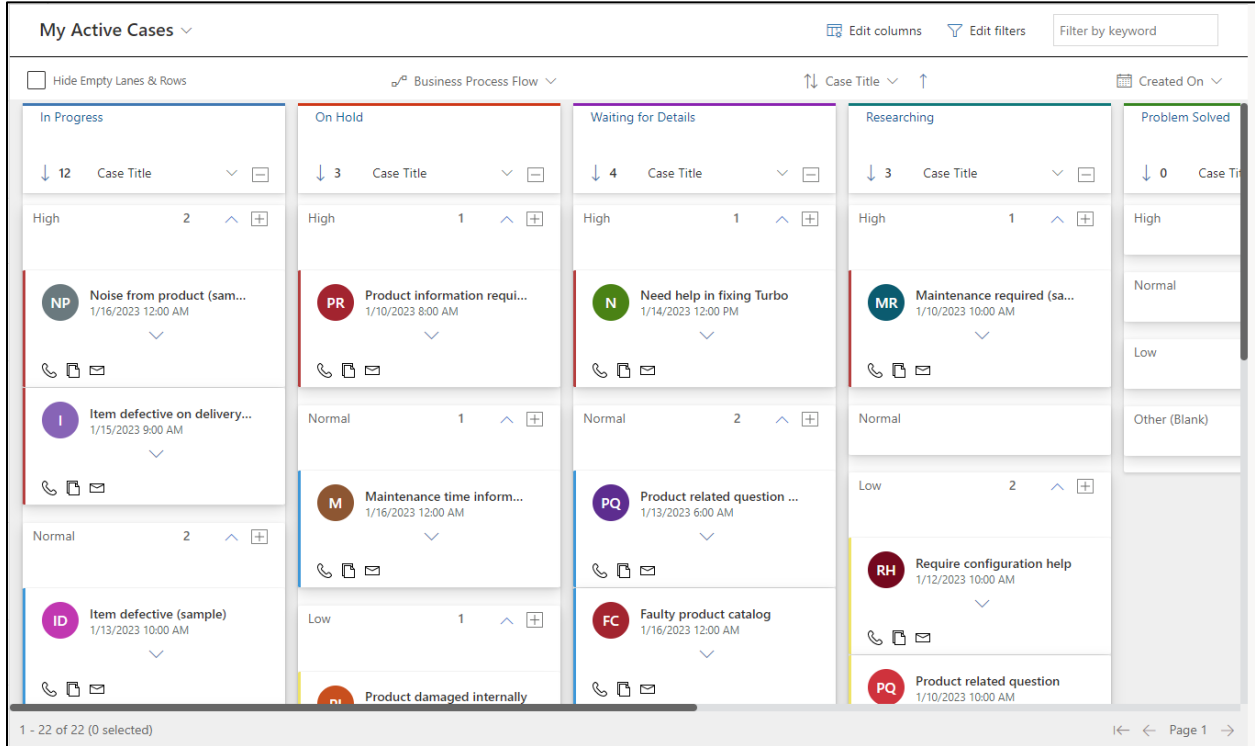
The field to be used for row categories can be defined when configuring the Kanban View Component for a view as shown below:
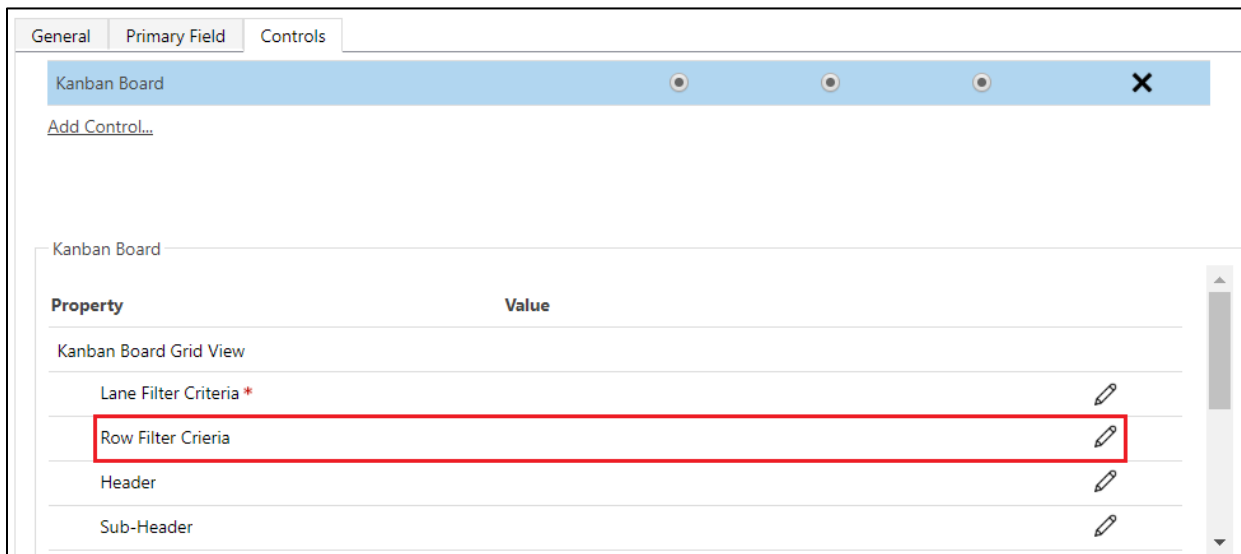
Another factor seen in Row Grouping is the 'Drop Zone'. This field will let you drag and drop records from one lane to another lane and update only the lane criteria. It is automatically enabled for non-optionset fields in row filter criteria.
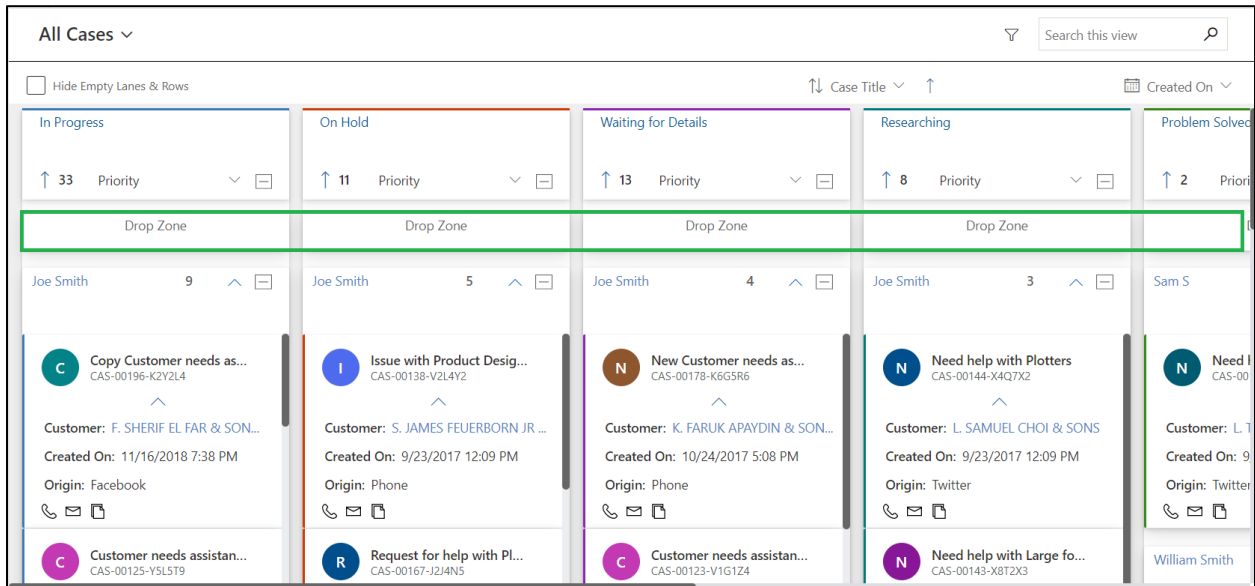
3. Visualize any CRM View as lanes as in a Kanban View. Ability to configure the fields for defining the categories.

Kanban Board presents the selected View in a Kanban view for quick access and easy understanding and classification of the data in the view.

The lanes are defined based on the unique value options supported for the specified field. The product currently supports all field types except complex field types like Customer and Multi-Select Optionset for defining lane categories.

Hide Empty lanes using the filter option provided at the top. Do note if the lanes are hidden, you will not be able to move the cards to the said lane and thereby update the record to that status.

The field to be used for lane categories can be defined when configuring the Kanban View Component for a view as shown below.
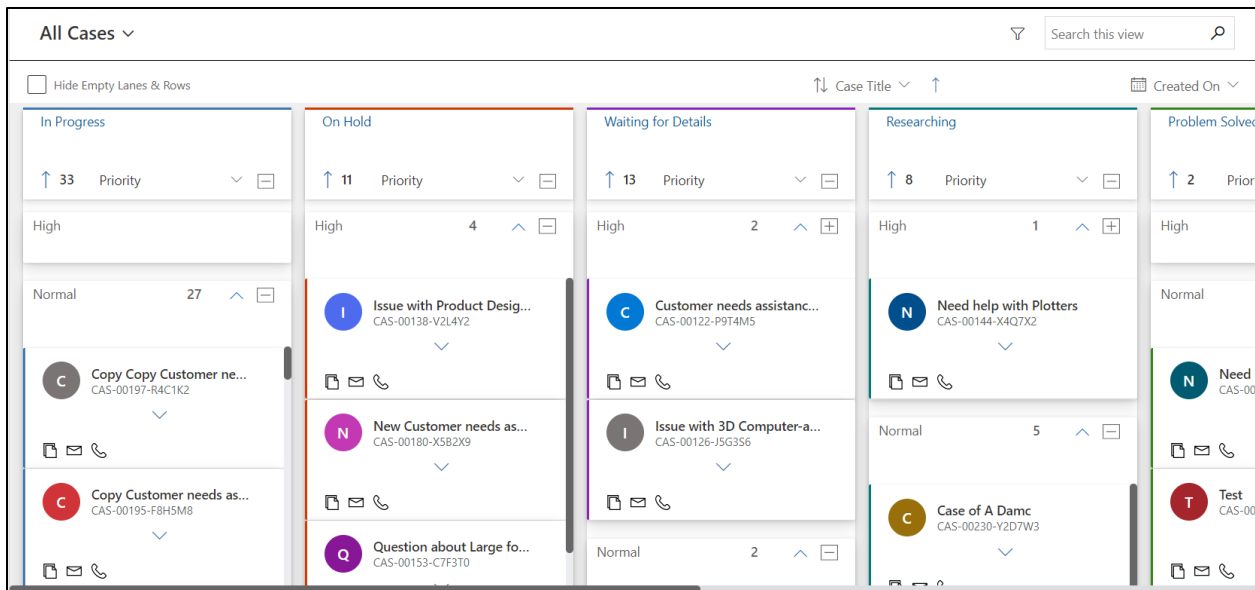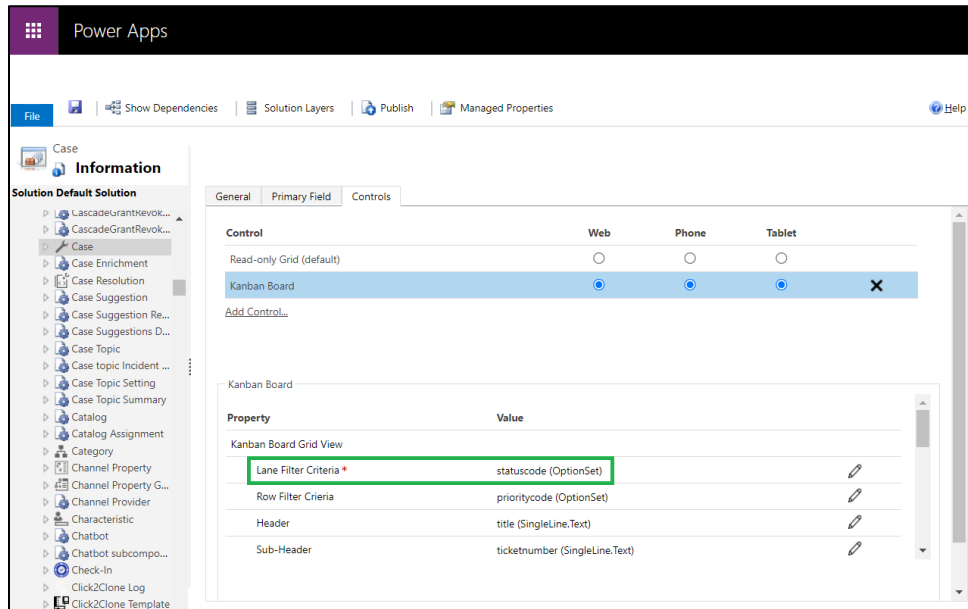

4. Ability to drag and drop the cards across columns to quickly update the values of the underlying category field.

Kanban Board presents a Kanban view of the records presented as compact cards. The product supports moving the records around from one lane to another with a quick drag and drop action. This also results in updating the corresponding field value appropriate to the data value of the lane.
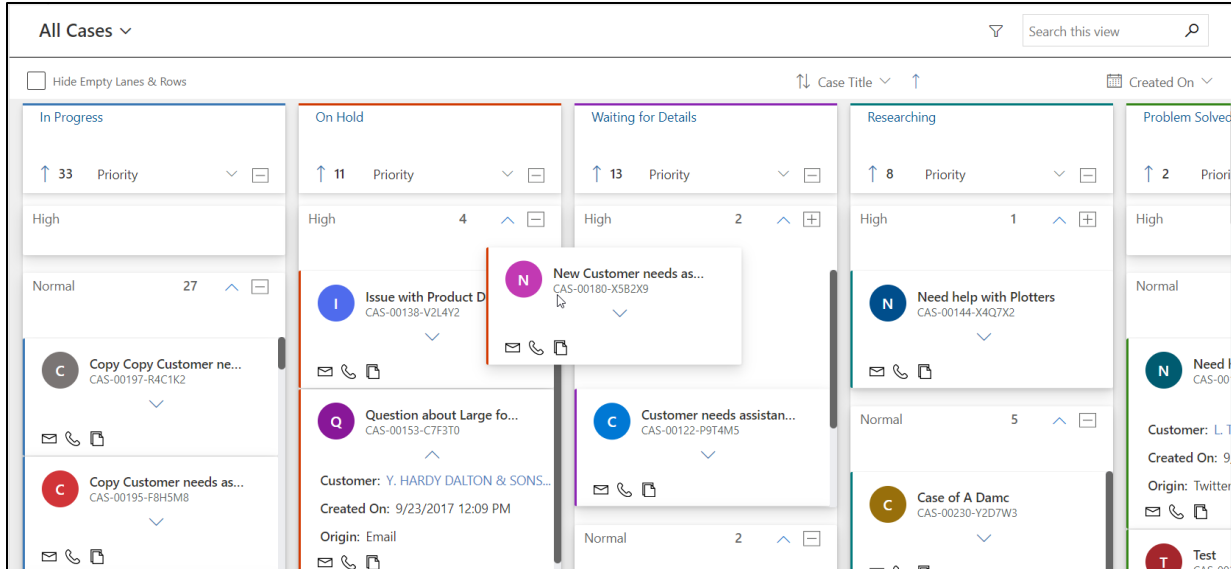
5. Quick access to important information in a compact card view.

The records in the Kanban View are represented as compact cards. You can define up to 5 fields to be displayed in the card.

Header Text

Sub Header Text

Body Text 1

Body Text 2

Body Text 3

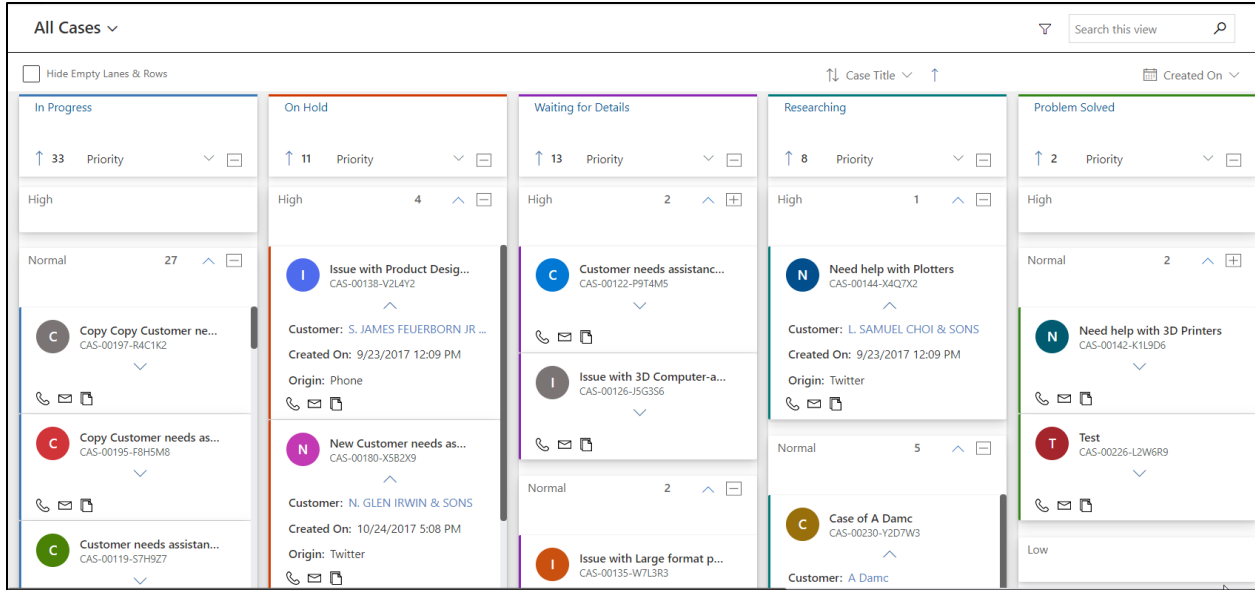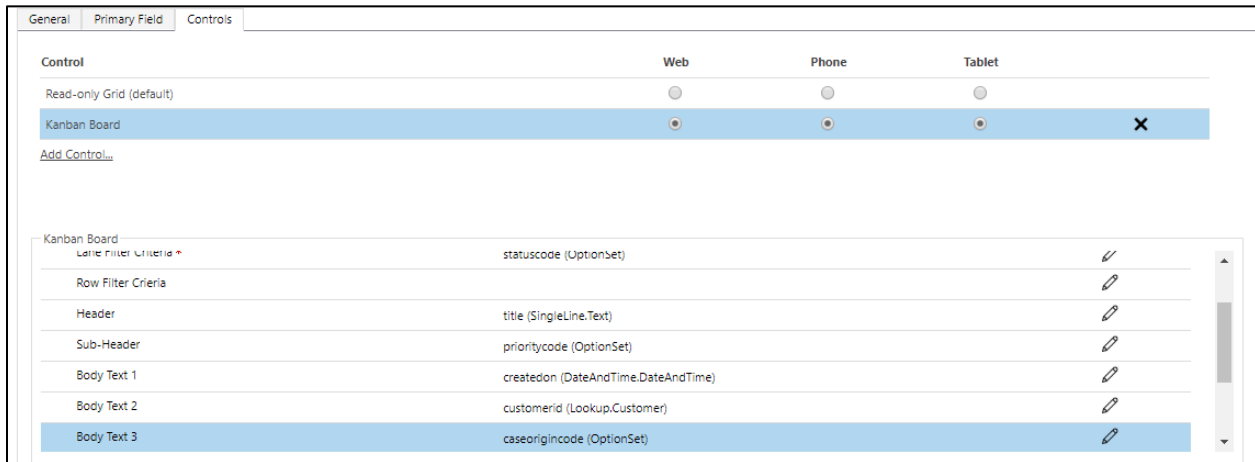You can collapse and expand the card view to show the details defined for the card.
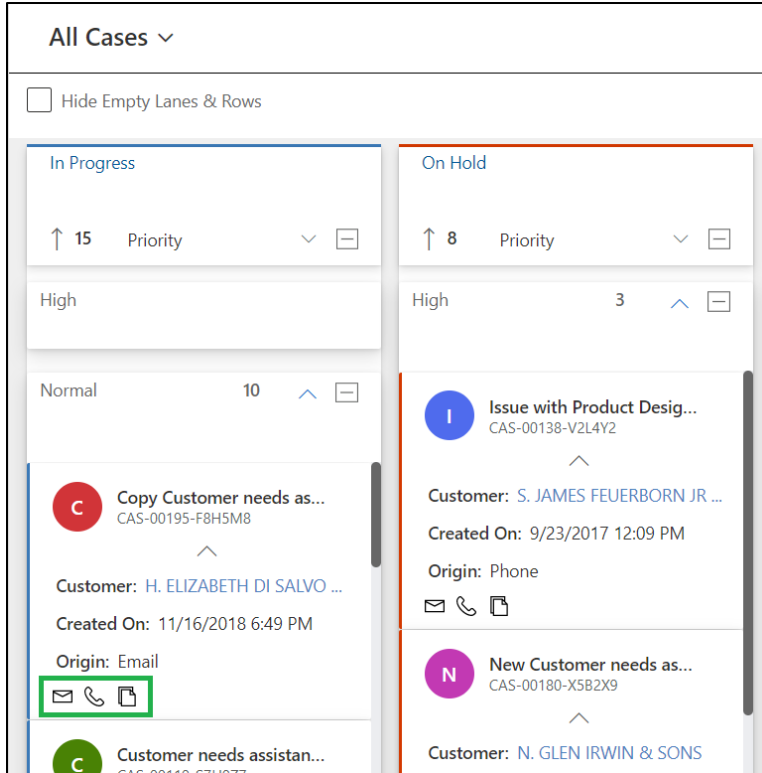
Double-click on the card to open the record form.

The fields for these can be defined when configuring the component for a view as shown in the screenshot below.
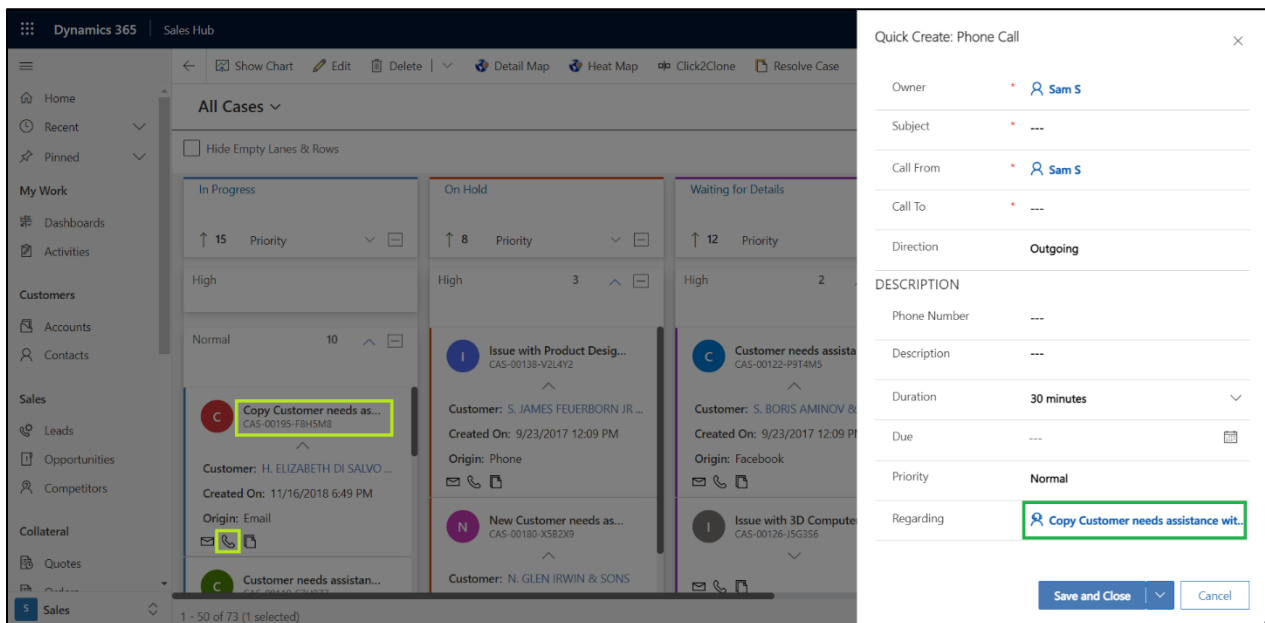

6. Support to define quick activity actions for the records.

Each card supports defining of up to 3 quick activity actions. You can create the activity record defined in a single click from this view.
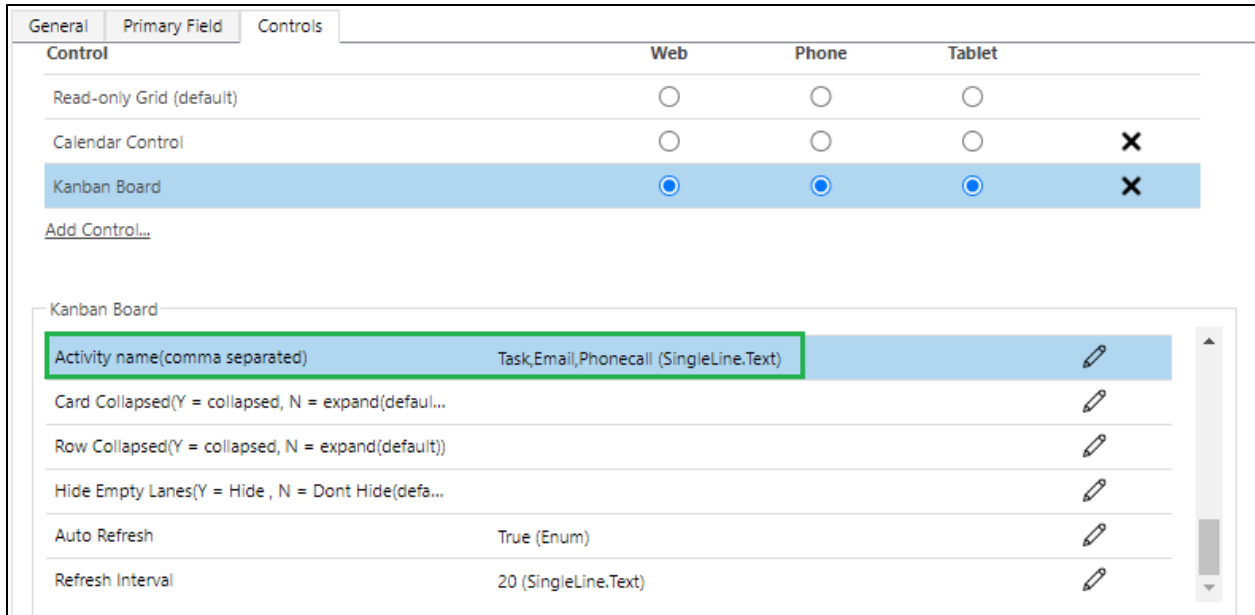
The quick create form that shows up comes pre-populated with the reference to the said record already set.

The activities to be supported can be defined in the configuration screen when setting up the component for a view as shown in the screenshot below.

Make sure to type in the schema name of the activity types. You can also choose a custom activity type here.

7. Works in context of the native CRM environment and responds to all native ribbon actions available for traditional views.

Kanban Board has been created as a Dataverse (Power Apps) Component. This means that you can use this control to replace the default visualization available for the views in CRM. The component is context-aware which means that you are allowed to perform any action from the ribbon bar by selecting the cards as you would in the traditional view upon selecting a record.
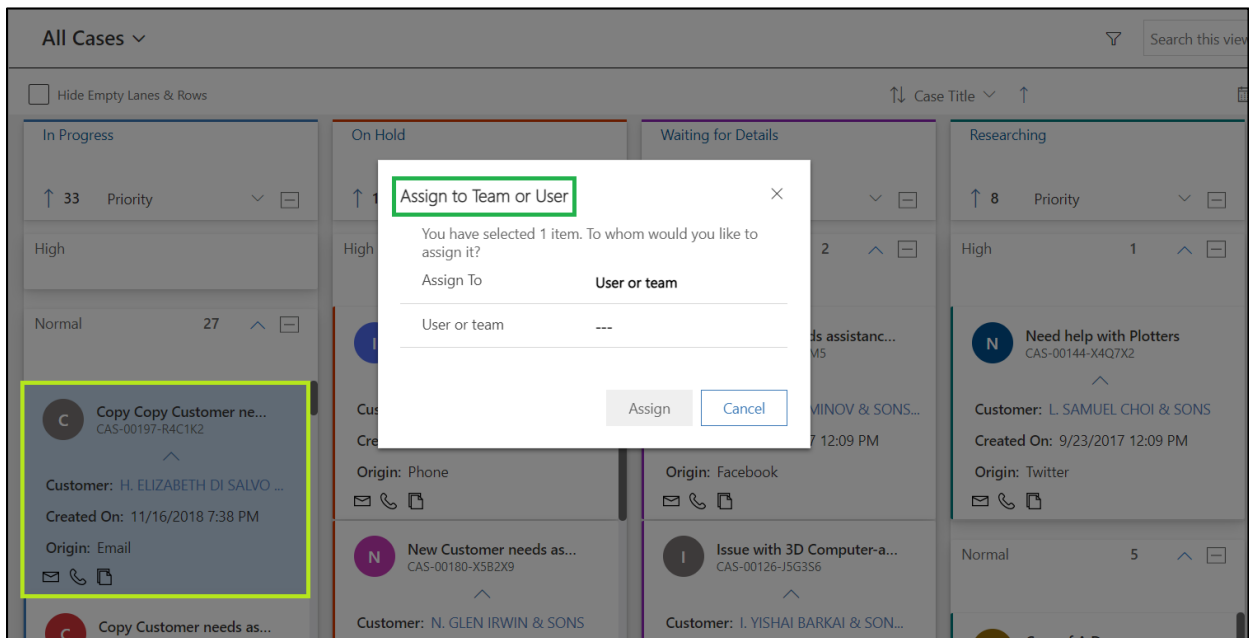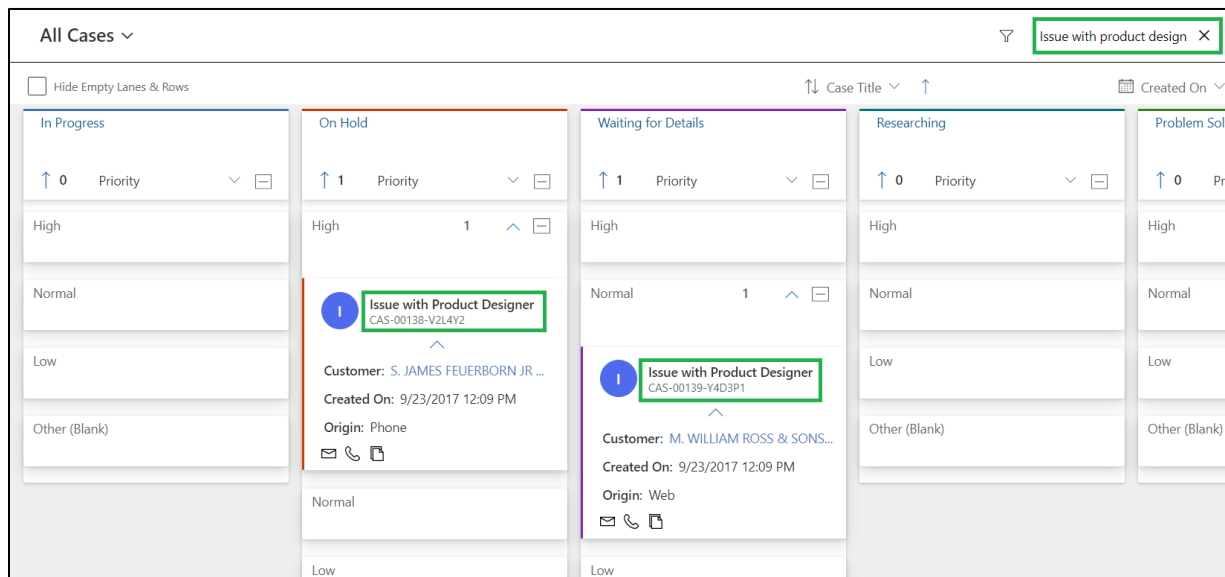
Apart from the ribbon it also responds to filtering options from Charts.
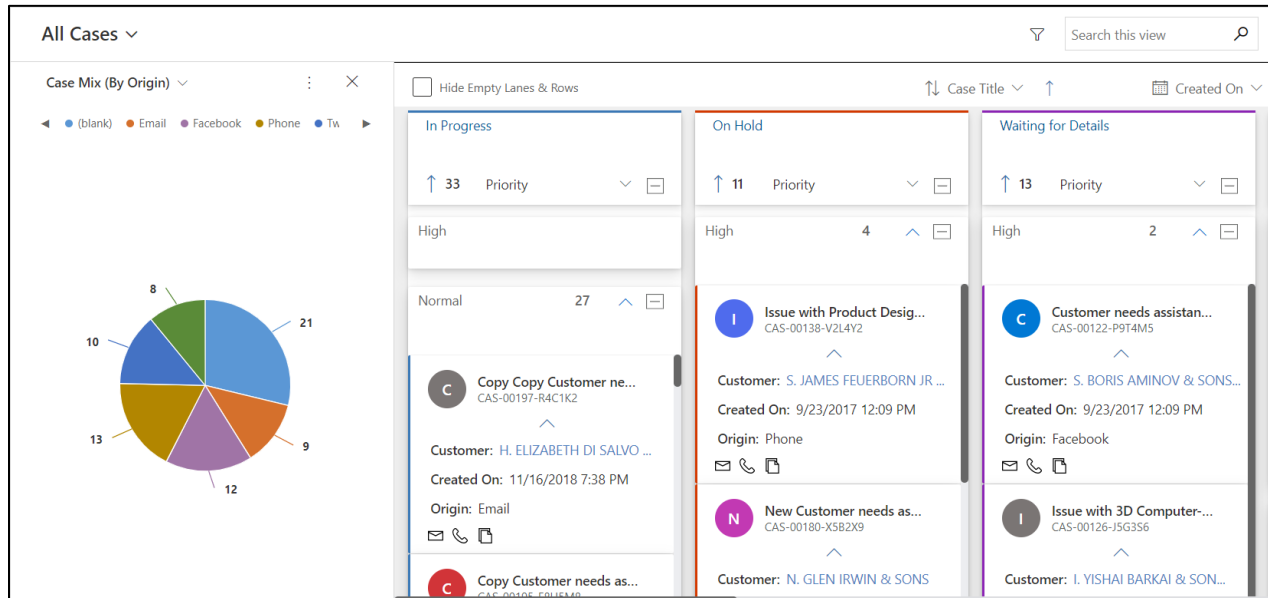
8. Support for search through native quick search available for views in CRM.

Being a Dataverse (Power Apps) Component that replaces the OOB grid components of the view, results of the quick search is reflected in the Kanban view as well.


9. Records in the lanes can be sorted. It also supports filtering of the data in the view by "CreatedOn" date.

The Kanban Board supports the ability to sort the cards in ascending or descending order of the field selected. You will be allowed to sort the cards based on the fields used in the card view.
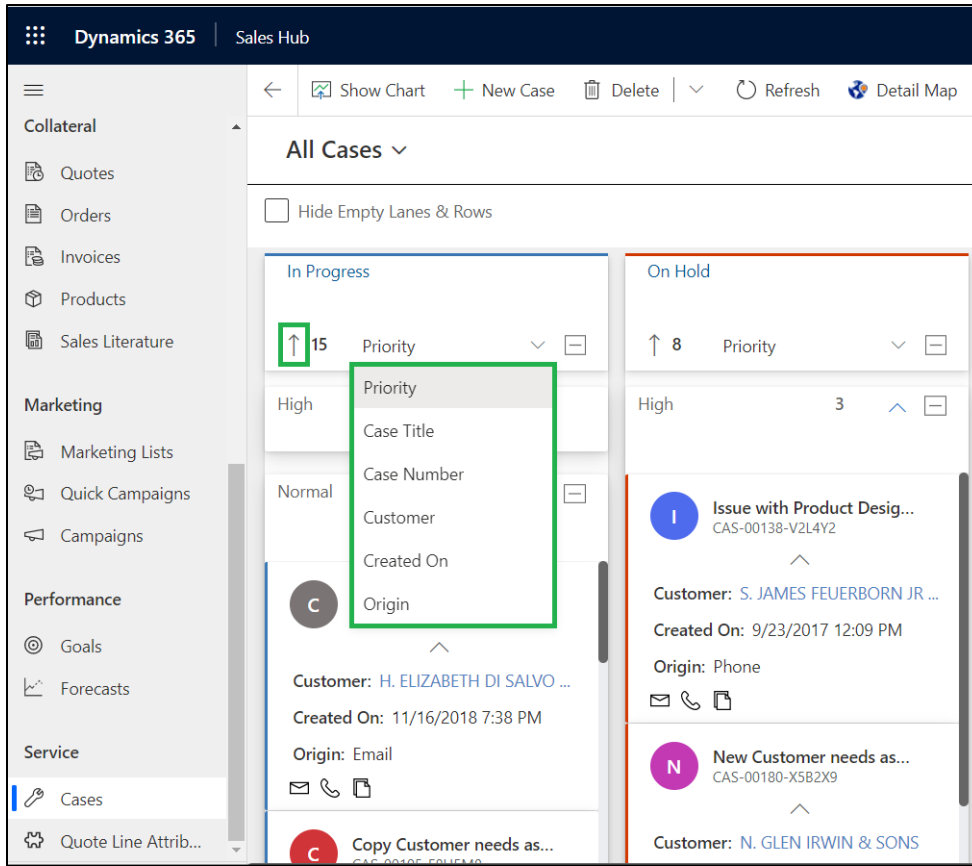
In addition to the quick search option, it also supports filtering of the records based on the "CreatedOn" date.
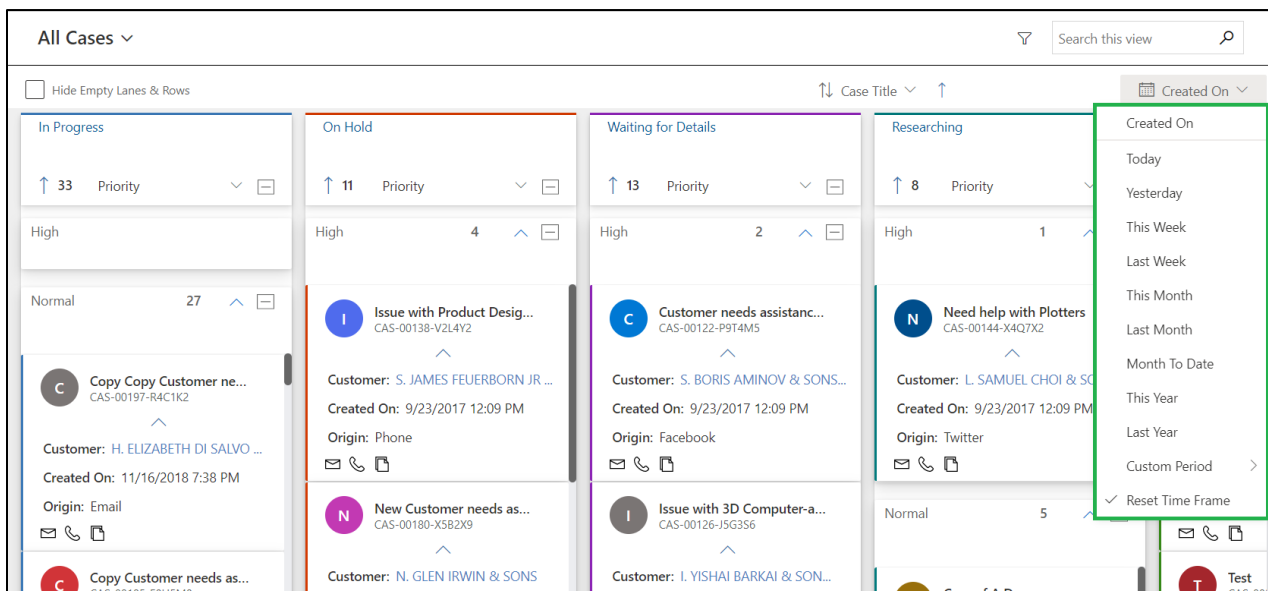
10. Records can be sorted at global level.

The Kanban Board supports the ability to sort the cards (records) at global level in ascending or descending order of the field selected. You will be allowed to sort the cards based on the fields used in both Kanban view and OOB Grid view.
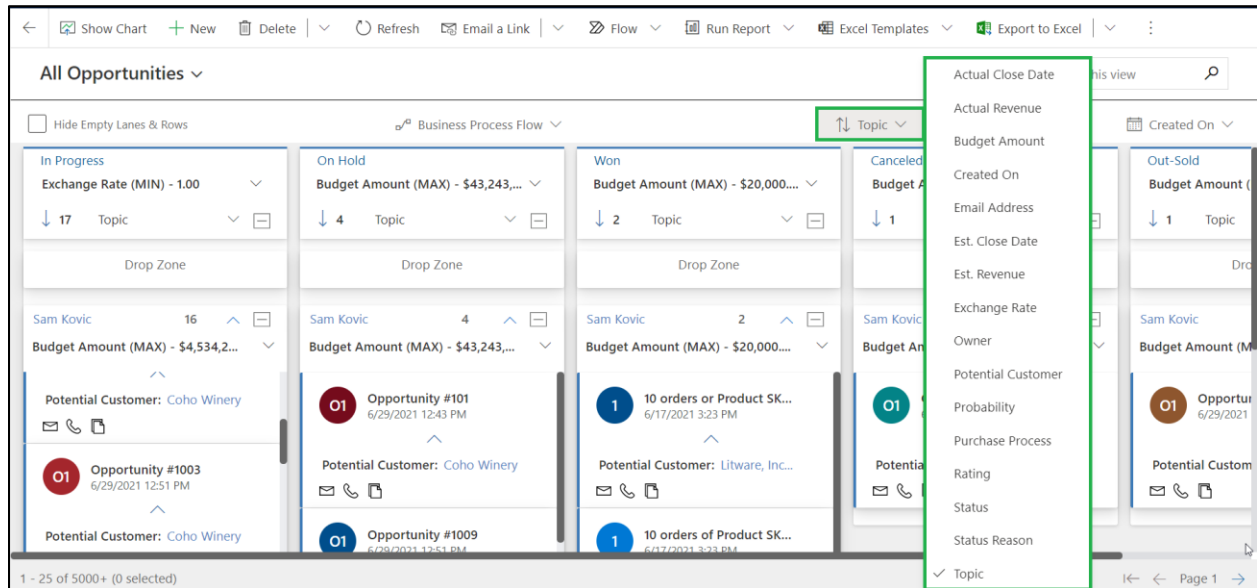
11. Aggregate value of specific fields can be represented on respective lane and row headers. It also supports pinning the desired aggregate value to a particular lane or row for easy analysis.

The Kanban Board enables calculation of specific aggregate field values of records which can be then displayed on both lane and row headers. You can define up to 3 fields which can be of numeric, decimal or currency datatype for which the aggregate values of the fields such as SUM, MAX, MIN or AVG will be displayed on each lanes and rows. If the lane has 20 records then the total sum of the currency field (Budget amount) of 20 records will be displayed on top of the lane.

In addition to this, you can pin the desired aggregate value of the records to a particular lane or row.

Aggregate field values shown on Lane header -

Aggregate field values shown on Row header –

Contact Us

M/S. INOGIC TECH (INDIA) PVT. LTD.

A/301, Everest Nivara InfoTech Park,

TTC Industrial Area, MIDC, Turbhe

Navi Mumbai, Maharashtra 400705

INDIA

E-mail: crm@inogic.com

Skype: crm@inogic.com

Twitter:@inogic