

Documentation

kanDO | Agile Projects V. 1.2.2.0

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1 INTRODUCTION

kanDO | Agile Projects is an add-on for Microsoft Dynamics 365 Apps but can be used as a single Power App as well. It meaningfully complements the projects related features in Dynamics 365 with a professional task engine that inherently supports true agility. Project managers will be given the ability to maintain an reliable overview of their teams operativ work, quickly detect discrepancies or conflicts and so manage projects in a more efficient way.

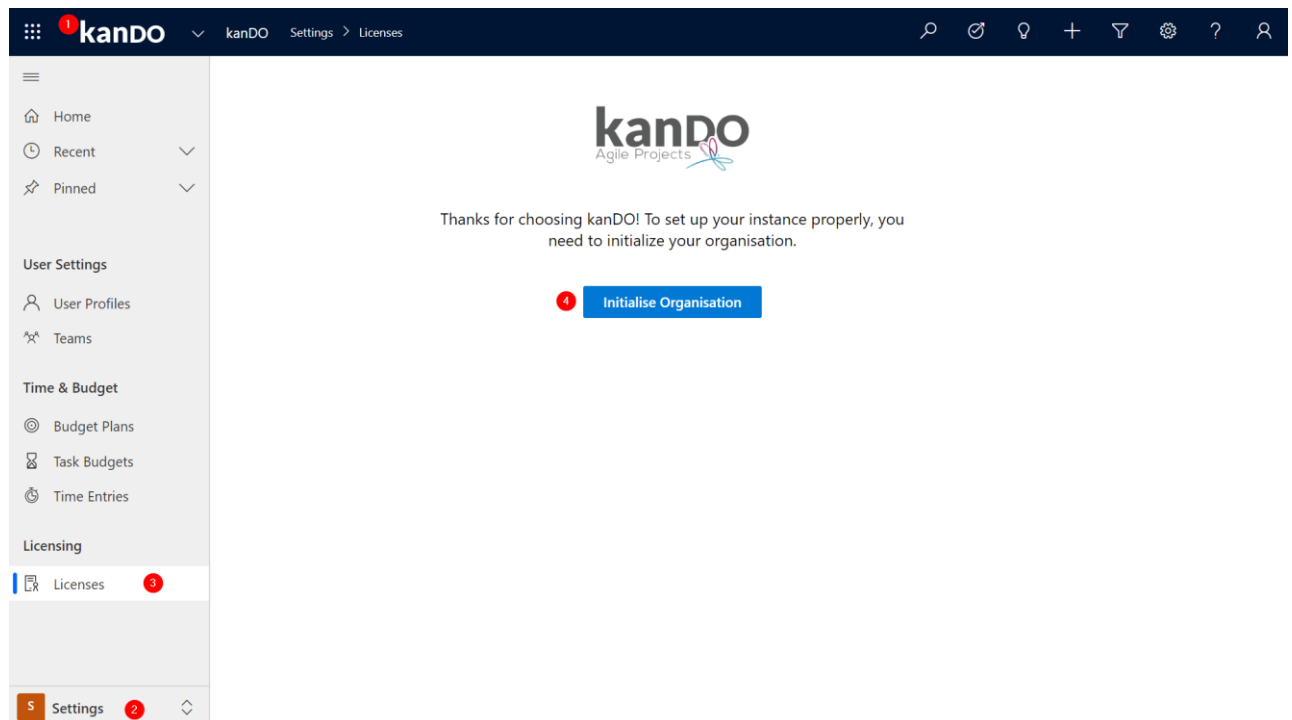
The use of kanDO | Agile Projects is certainly not limited to the project realm and can either be used as a dedicated solution for managing tasks or easily be integrated to any other Dynamics 365 first party app.

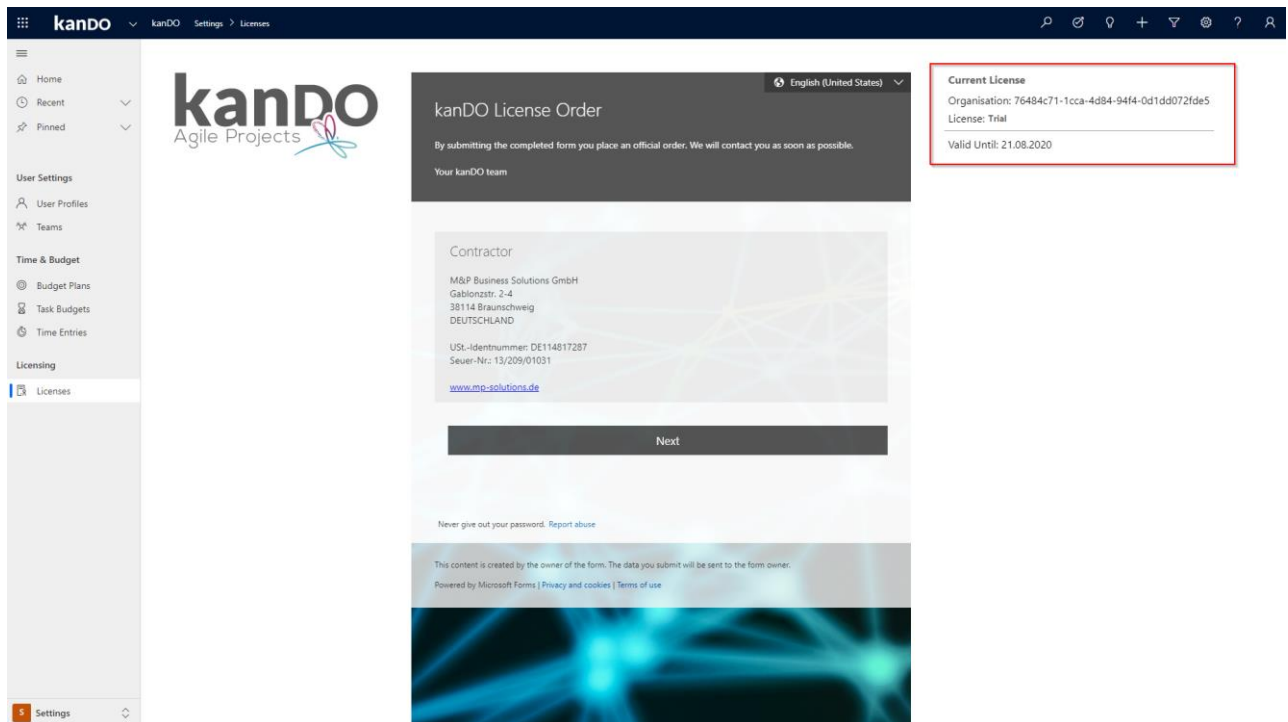
This document contains explanations only for the most basic configurations and features. It is not meant to be an exhaustive product documentation.

2 ACTIVATION & LICENSES

To start working with kanDO | Agile Projects it is necessary to activate the product. Follow the steps below to start off with a free 14-day trial.

1. Open the kanDO App
2. Switch to the *Settings* area
3. Click on *Licenses*
4. Click the *Initialise Organisation* button





The screenshot shows the 'kando License Order' form in the kando application. The left sidebar contains navigation links: Home, Recent, Pinned, User Settings, User Profiles, Teams, Time & Budget, Budget Plans, Task Budgets, Time Entries, Licensing, and Licenses. The main content area is titled 'kando License Order' and includes a 'Current License' section with the following details:

Current License
Organisation: 76484c71-1cca-4d84-94f4-0d1dd072fde5
License: Trial
Valid Until: 21.08.2020

The form also includes a 'Contractor' section with the following information:

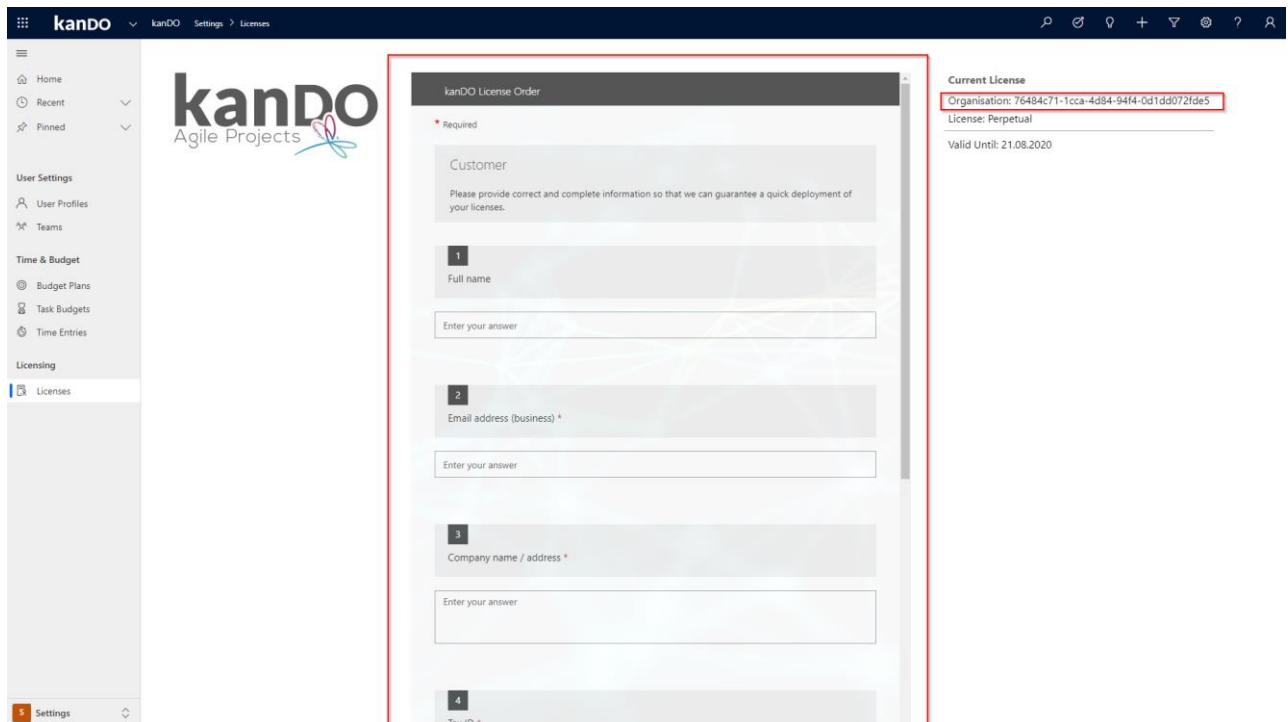
M&P Business Solutions GmbH
 Gablonzstr. 2-4
 38114 Braunschweig
 DEUTSCHLAND

USL-Identnummer: DE114817287
 Steuer-Nr.: 13/209/01031
www.m-p-solutions.de

A 'Next' button is located below the contractor information. At the bottom of the form, there is a disclaimer: 'This content is created by the owner of the form. The data you submit will be sent to the form owner. Powered by Microsoft Forms | Privacy and cookies | Terms of use'.

The free 14-day trial is now active.

To proceed with either a free or paid license after the trial period ends, go back to the *Settings* area, click on *Licenses* and fill out the form.



The Organization ID must be submitted through the form to activate the license.

Come back to this site to check your license status.

3 SECURITY

kanDO | Agile Projects comes with different security roles. Before a user can start working with kanDO it must be assigned one or more security roles.

- **kanDO User** – Assign to users that'll be primarly working with tasks
- **kanDO Context Creator** – Assign to users that'll be creating contexts
- **kanDO Visitor** – Assign to users that'll only need read access to contexts
- **kanDO Administrator** – Assign to users that'll be maintaining entities like *kanDO Teams*
- **kanDO Team** – Assign to Dynamics Teams that'll be used as *kanDO Teams*

*If you use kanDO as a single app, make sure that all users have at least the standard security role **Common Data Service User** to access any Model Driven App in a CDS or Dynamaics 365 environment.*

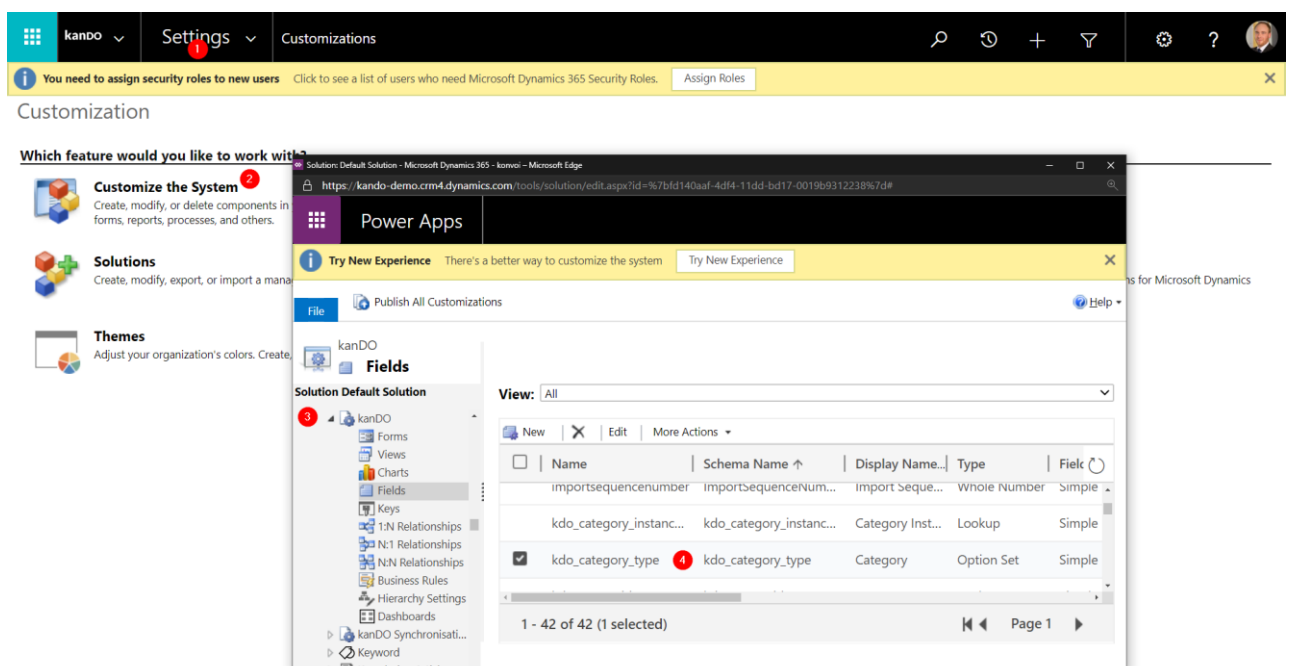
4 CUSTOMIZATIONS

In order to use all of the features delivered by kanDO | Agile Projects, some minor customizations must be made. Ask a system administrator to customize the system as follows.

4.1 Categories

Categories can be used to globally tag any kind of task in kanDO. Once customized in the system settings, they can be added to any task on any context. Tags can be configured specifically on each context – see 4.2.

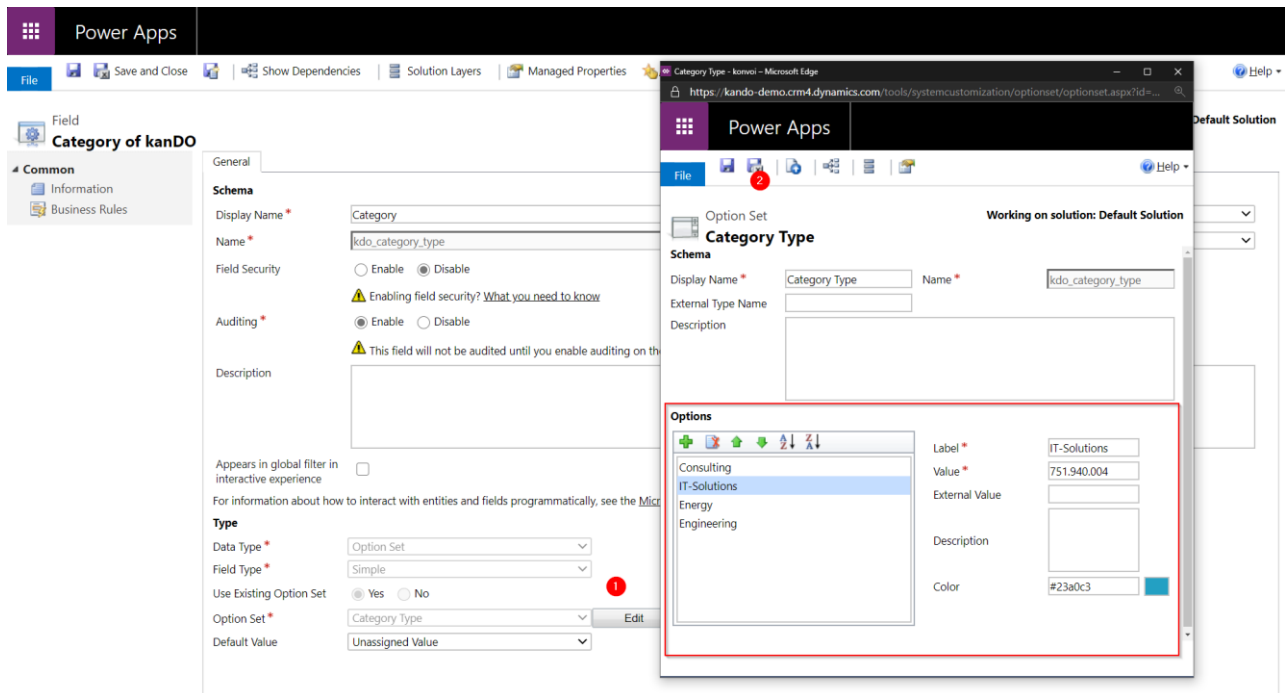
1. Open the Dynamics 365 Settings
2. Go to *Customize the system*
3. Open the *kanDO* entity
4. Open the *kdo_category_type* field
5. Edit the option set
6. Save and publish the customizations



The screenshot shows the Microsoft Dynamics 365 Settings interface. The top navigation bar includes 'kanDO', 'Settings', and 'Customizations'. A yellow banner at the top states: 'You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. Assign Roles'. Below this, the 'Customization' section is active, showing options to 'Customize the System', 'Solutions', and 'Themes'. The 'Customize the System' option is selected, leading to a 'Fields' view for the 'kanDO' entity. The 'Fields' view shows a list of fields, with 'kdo_category_type' selected. The 'kdo_category_type' field is an 'Option Set' type. The interface also shows a 'Try New Experience' banner and a 'Publish All Customizations' button.

Name	Schema Name	Display Name	Type	Field
importsequencenumber	importsequencenumber	Import Sequen...	Whole Number	Simple
kdo_category_instanc...	kdo_category_instanc...	Category Inst...	Lookup	Simple
<input checked="" type="checkbox"/> kdo_category_type	kdo_category_type	Category	Option Set	Simple

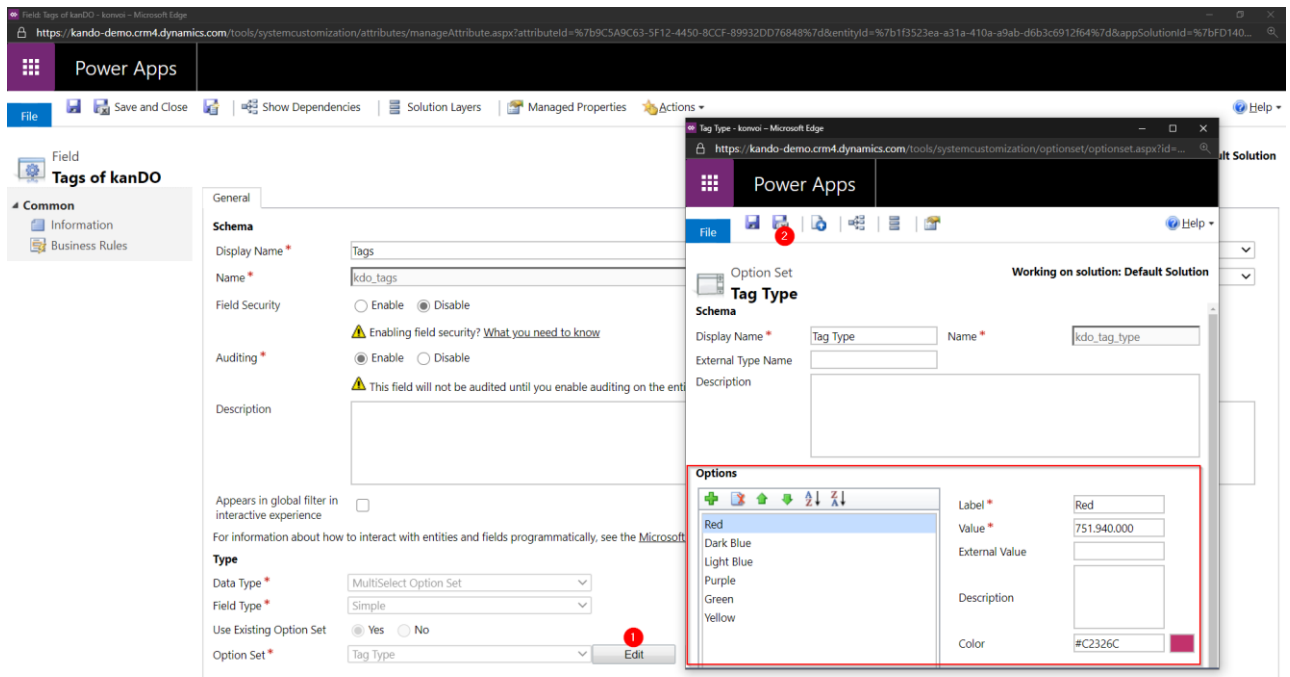
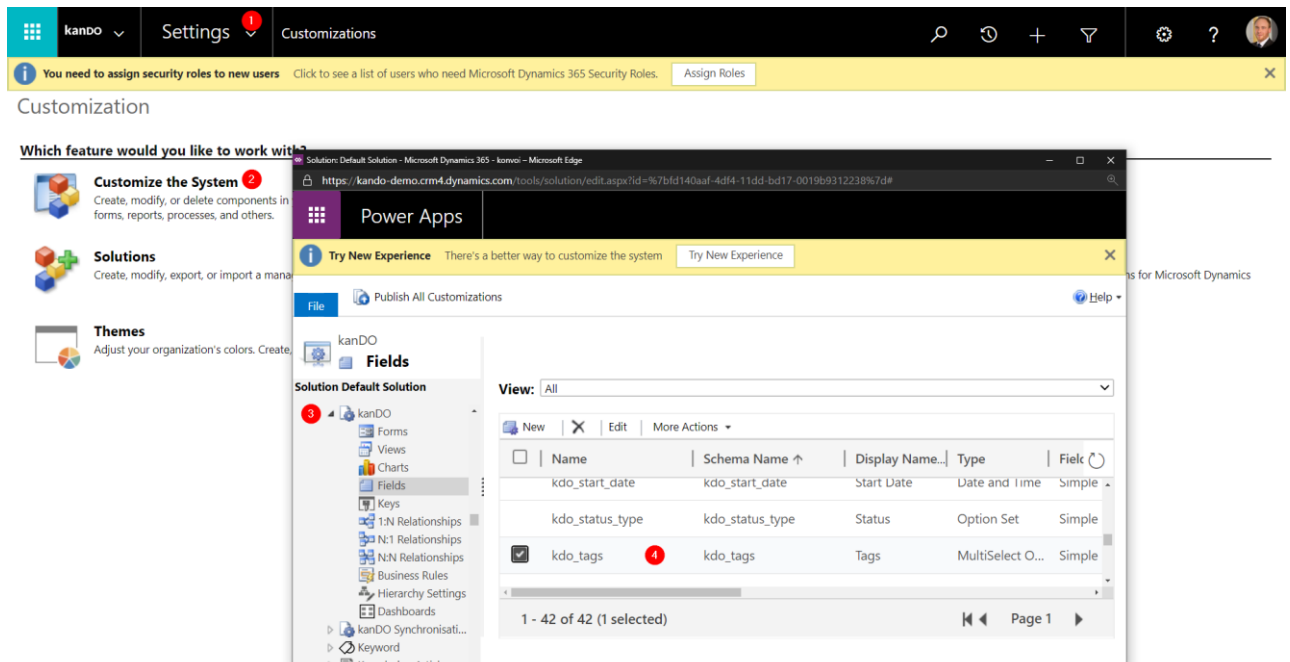
1 - 42 of 42 (1 selected) Page 1



4.2 Tags

Tags must be configured globally before they can be added to a context and then be added to any task on a given context.

1. Open the Dynamics 365 Settings
2. Go to *Customize the system*
3. Open the *kanDO* entity
4. Open the *kdo_tags* field
5. Edit the option set
6. Save and publish the customizations



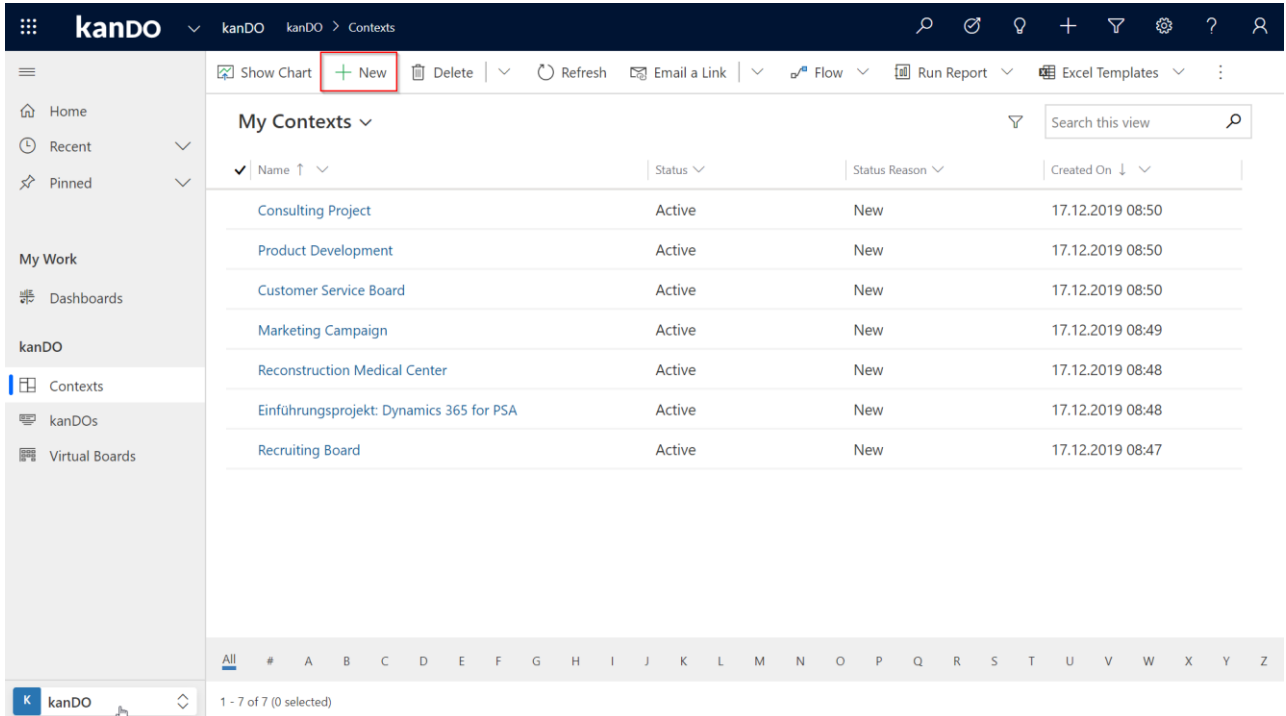
5 FEATURES

In this section you'll find the most basic features of kanDO | Agile Projects explained in short.

5.1 Contexts

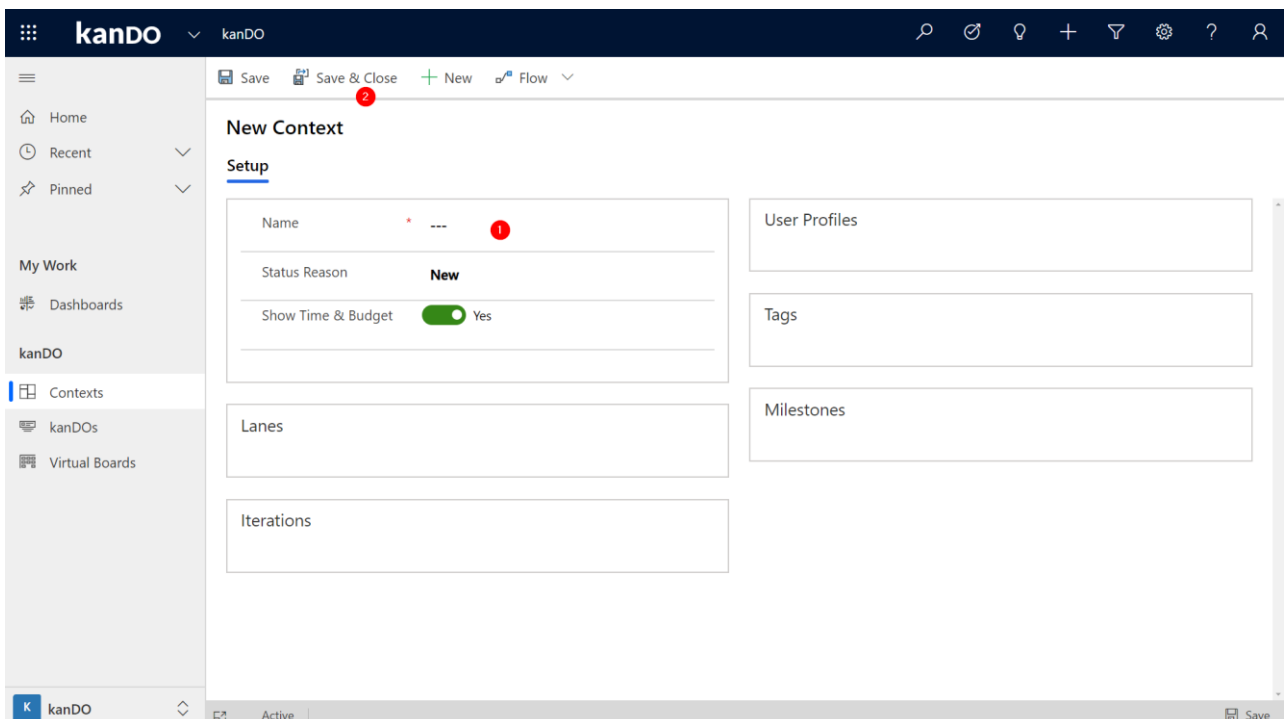
Contexts serve as „containers“ for managing any amount of tasks for a projects.

1. Create a context by clicking the New button under Contexts
2. Fill out the mandatory fields and save the context



The screenshot shows the 'My Contexts' view in the Kando application. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, kanDO, Contexts (selected), kanDOs, and Virtual Boards. The main area displays a table of contexts. The '+ New' button is highlighted with a red box.

Name	Status	Status Reason	Created On
Consulting Project	Active	New	17.12.2019 08:50
Product Development	Active	New	17.12.2019 08:50
Customer Service Board	Active	New	17.12.2019 08:50
Marketing Campaign	Active	New	17.12.2019 08:49
Reconstruction Medical Center	Active	New	17.12.2019 08:48
Einführungsprojekt: Dynamics 365 for PSA	Active	New	17.12.2019 08:48
Recruiting Board	Active	New	17.12.2019 08:47



The screenshot shows the 'New Context' setup form in the Kando application. The left sidebar is the same as the previous screenshot. The main area displays the 'New Context' setup form. Red circles 1 and 2 highlight the 'Name' field and the 'Save' button respectively.

New Context Setup

Name: (Red circle 1)

Status Reason: **New**

Show Time & Budget: ☒ Yes

Lanes:

Iterations:

User Profiles:

Tags:

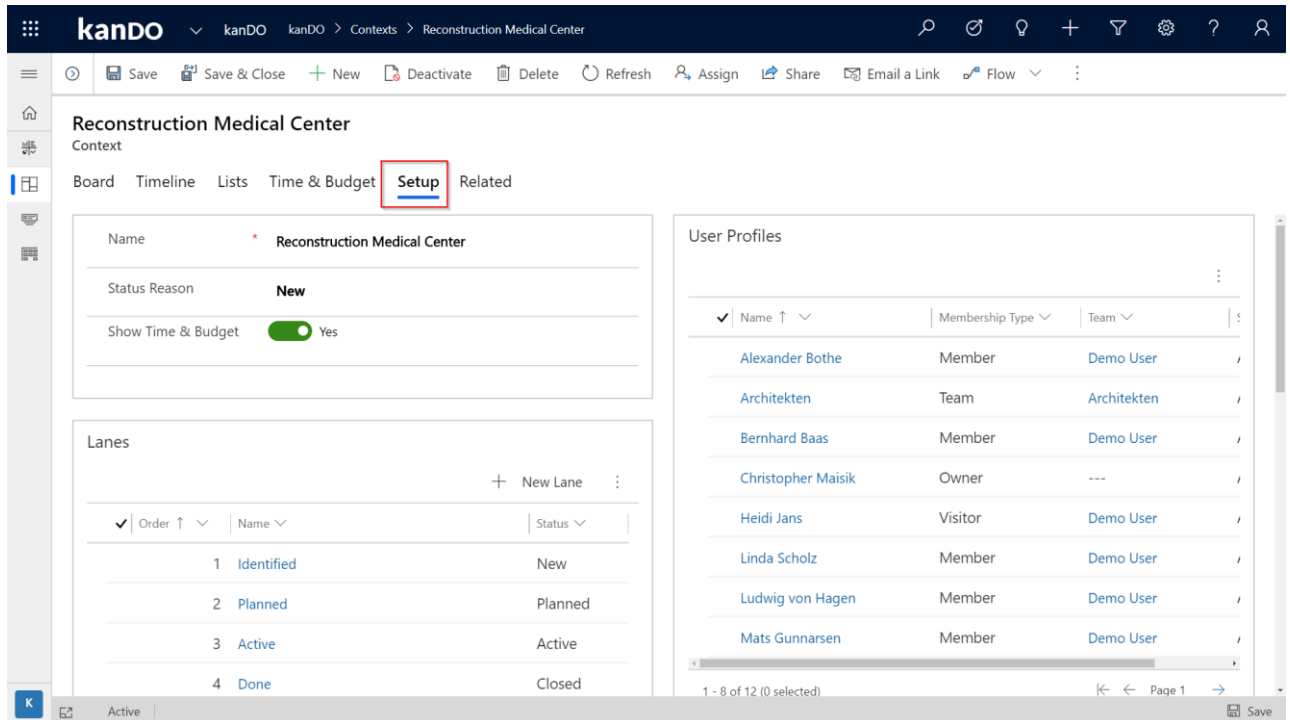
Milestones:

Save (Red circle 2)

5.1.1 Setup

Before starting to work with a context it is best to set up the components named below. These will help you make use of the contexts full functionalities.

- 1 Open the *Setup* tab on the context record

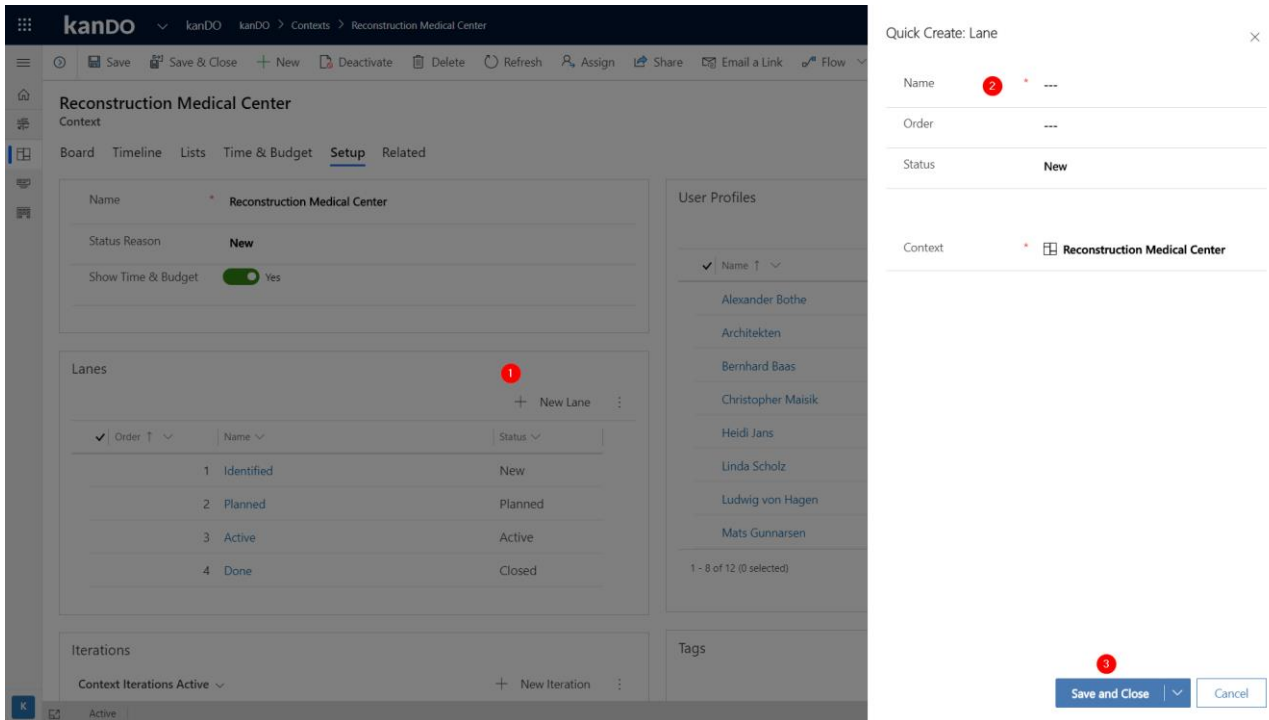


The screenshot shows the Kando application interface. The top navigation bar includes the Kando logo and a breadcrumb trail: **kanDO** > **kanDO** > **Contexts** > **Reconstruction Medical Center**. Below the navigation bar is a toolbar with various actions: Save, Save & Close, New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, and Flow. The main content area is titled 'Reconstruction Medical Center Context'. It features a tabbed interface with 'Board', 'Timeline', 'Lists', 'Time & Budget', 'Setup' (highlighted with a red box), and 'Related'. The 'Setup' tab contains two main sections: 'Context Information' and 'Lanes'. The 'Context Information' section includes fields for 'Name' (Reconstruction Medical Center), 'Status Reason' (New), and 'Show Time & Budget' (Yes). The 'Lanes' section has a table with columns for 'Order', 'Name', and 'Status'. The table contains four rows: 1 Identified (New), 2 Planned (Planned), 3 Active (Active), and 4 Done (Closed). To the right of the 'Setup' tab is a 'User Profiles' section, which displays a table of users with columns for 'Name', 'Membership Type', and 'Team'. The table lists eight users: Alexander Bothe (Member, Demo User), Architekten (Team, Architekten), Bernhard Baas (Member, Demo User), Christopher Maisik (Owner, ---), Heidi Jans (Visitor, Demo User), Linda Scholz (Member, Demo User), Ludwig von Hagen (Member, Demo User), and Mats Gunnarsen (Member, Demo User). At the bottom of the 'User Profiles' section, it indicates '1 - 8 of 12 (0 selected)' and 'Page 1'.

5.1.1.1 Lanes

Create lanes to group tasks by individual criteria.

1. Click the *New* button on the *Lanes* subgrid to create lanes and add them to the context
2. The lanes created from the subgrid will appear in the *Board* view.



Reconstruction Medical Center

Context

Board Timeline Lists Time & Budget **Setup** Related

Name * Reconstruction Medical Center

Status Reason New

Show Time & Budget ☒ Yes

Lanes

Order	Name	Status
1	Identified	New
2	Planned	Planned
3	Active	Active
4	Done	Closed

User Profiles

- Alexander Bothe
- Architekten
- Bernhard Baas
- Christopher Maisik
- Heidi Jans
- Linda Scholz
- Ludwig von Hagen
- Mats Gunnarsen

1 - 8 of 12 (0 selected)

Iterations

Context Iterations Active

Tags

Quick Create: Lane

Name * ---

Order ---

Status New

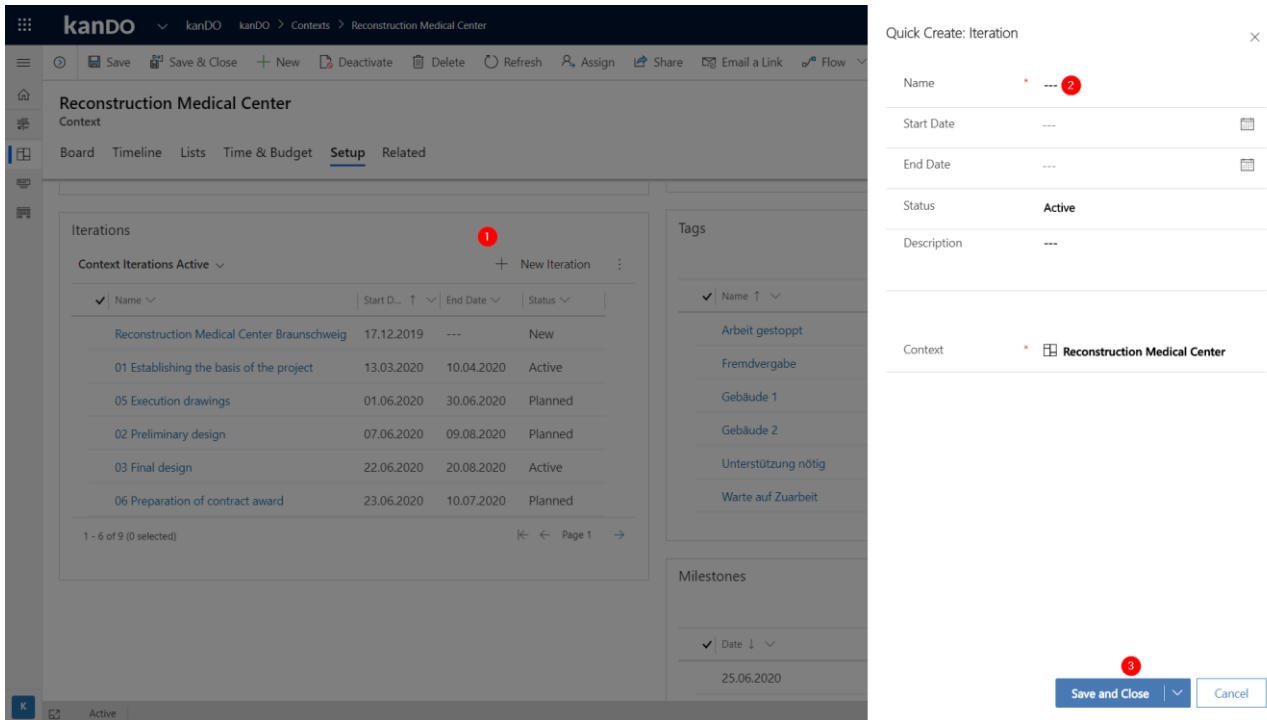
Context * Reconstruction Medical Center

Save and Close Cancel

5.1.1.2 Iterations

Create iterations to depict Sprints. Iterations must have a start and end date.

1. Click the *New* button on the *Iterations* subgrid to create iterations and add them to the context
2. The iterations created from the subgrid will appear in the *Board* view and on the *Timeline* and can be used to filter down the tasks to the specific iteration



Reconstruction Medical Center
Context

Board Timeline Lists Time & Budget **Setup** Related

Iterations

Context Iterations Active 1 + New Iteration

Name	Start Date	End Date	Status
Reconstruction Medical Center Braunschweig	17.12.2019	---	New
01 Establishing the basis of the project	13.03.2020	10.04.2020	Active
05 Execution drawings	01.06.2020	30.06.2020	Planned
02 Preliminary design	07.06.2020	09.08.2020	Planned
03 Final design	22.06.2020	20.08.2020	Active
06 Preparation of contract award	23.06.2020	10.07.2020	Planned

1 - 6 of 9 (0 selected) Page 1

Tags

- Arbeit gestoppt
- Fremdvergabe
- Gebäude 1
- Gebäude 2
- Unterstützung nötig
- Warte auf Zuarbeit

Milestones

- 25.06.2020

Quick Create: Iteration

Name * --- 2

Start Date ---

End Date ---

Status **Active**

Description ---

Context * **Reconstruction Medical Center**

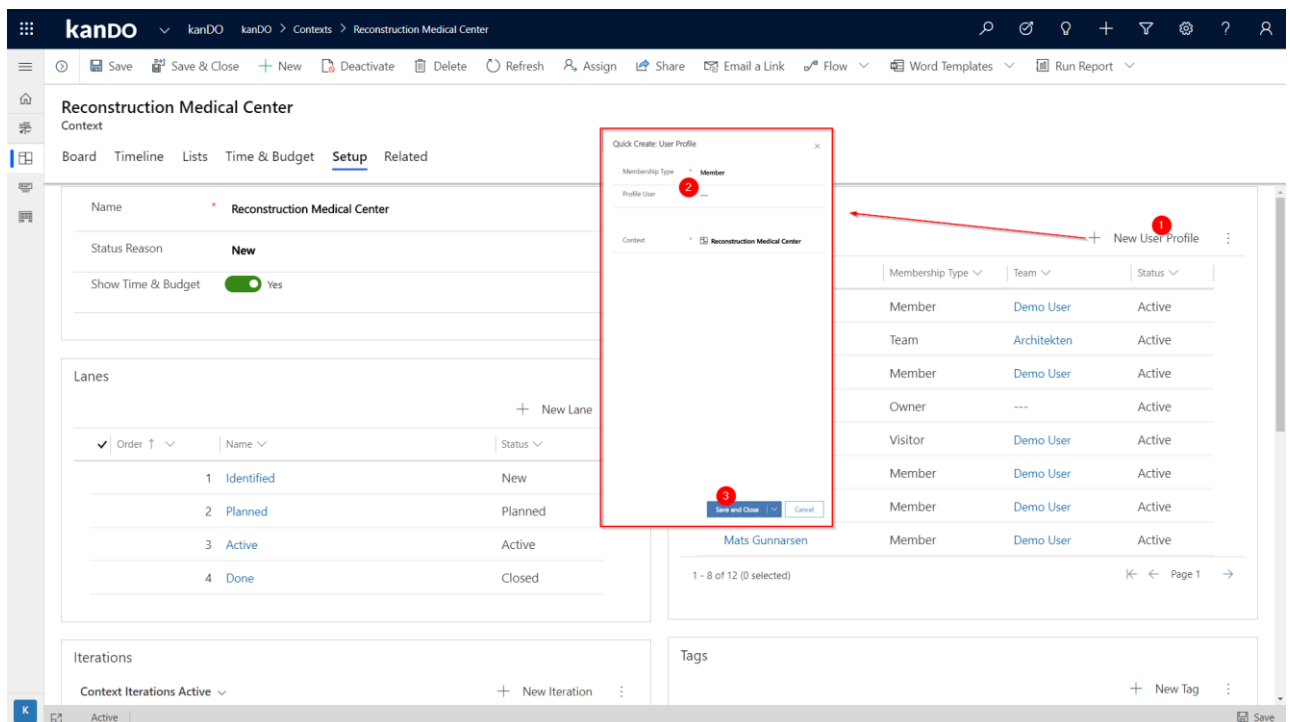
3 Save and Close Cancel

This feature allows you to manage your tasks and workpackages in different sprints according to agile project methodology.

5.1.1.3 User Profiles

Create user profiles to allow system users to work with a context. Users can either be owners, members or visitors on a context.

1. Click the *New* button on the *User Profiles* subgrid to create user profiles and add them to the context
2. All created users can now be assigned tasks.



Reconstruction Medical Center
Context

Board Timeline Lists Time & Budget **Setup** Related

Name * **Reconstruction Medical Center**

Status Reason **New**

Show Time & Budget ☒ Yes

Lanes

Order	Name	Status
1	Identified	New
2	Planned	Planned
3	Active	Active
4	Done	Closed

Iterations

Context Iterations Active

Tags

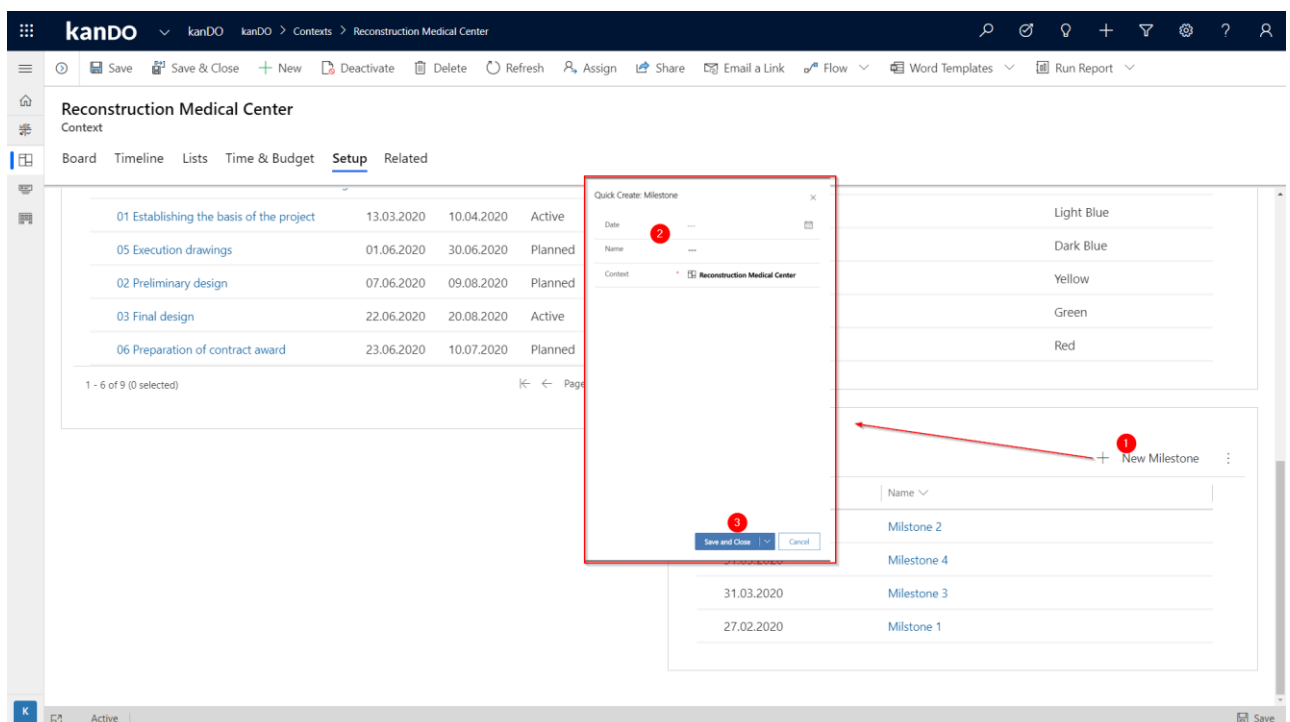
Context Iterations Active

Tags

5.1.1.4 Milestones

Create milestones that'll be added on the timeline.

1. Click the *New* button on the *Milestones* subgrid to create milestones and add them to the context
2. All created milestones will appear in the *Timeline*



Reconstruction Medical Center
Context

Board Timeline Lists Time & Budget **Setup** Related

01 Establishing the basis of the project 13.03.2020 10.04.2020 Active

05 Execution drawings 01.06.2020 30.06.2020 Planned

02 Preliminary design 07.06.2020 09.08.2020 Planned

03 Final design 22.06.2020 20.08.2020 Active

06 Preparation of contract award 23.06.2020 10.07.2020 Planned

1 - 6 of 9 (0 selected)

Quick Create: Milestone

Date * (indicated by a red circle)

Name

Context * **Reconstruction Medical Center**

Save and Close (indicated by a red circle)

Cancel

New Milestone (indicated by a red arrow)

Name

Milestone 2

Milestone 4

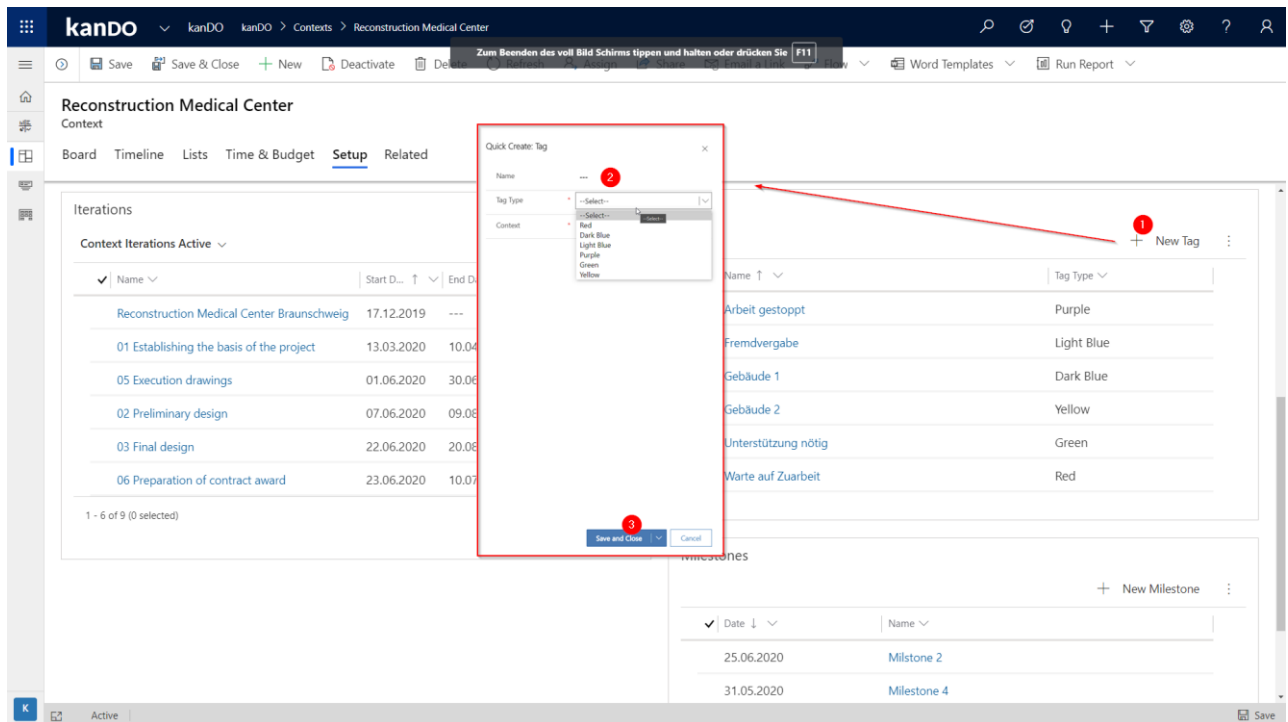
31.03.2020 Milestone 3

27.02.2020 Milestone 1

5.1.1.5 Tags

Create tags to individually mark the tasks on a context.

1. Click the *New* button on the *Tags* subgrid to create tags and add them to the context
2. All created tags will appear in the option set field on any task

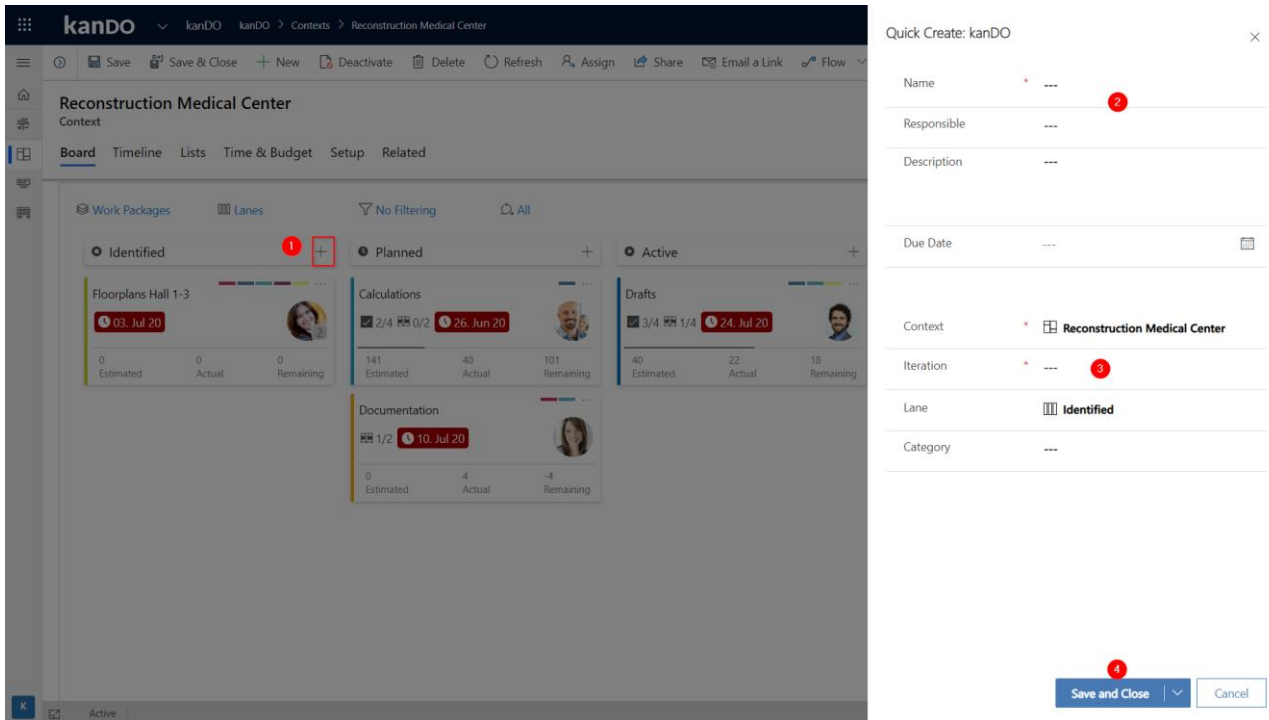


5.2 kanDOs

kanDOs can be of different types such as: Workpackage, task or subtask. All types will be reflected on the *Board View* and *Timeline*.

5.2.1 Creating Tasks

1. Open a context and create a new kanDO by clicking the *+* button on a lane
2. Fill out the quick create form and click save
3. All created kanDOs will appear in the *Board view* and *Timeline*



5.2.2 Managing Tasks

Tasks can be managed in different ways. The kanDO Form, the Kanban Board and the Timeline are just three quick examples.

5.2.2.1 kanDO Form

On the *Kanban Board*, click on a task to open the kanDO form. Here you can fill out more information.

1. General information – Enter basic information about the task
2. Related kanDOs – Create subtasks from directly from a *Board view*
3. Time & Budget – Create Task-Budgets and Time Entries

kando kanDO kanDO > Contexts > Reconstruction Medical Center

Ventilation calculations

Save Save & Close + New Deactivate Delete Refresh Assign View Hierarchy Share Email a Link Follow Flow Word Templates Run Report

Ventilation calculations
kanDO

Reconstruction Medical Center Context 02 Preliminary design Iteration Active Lane Energy Category

General Related kanDOs Time & Budget Related

Name Ventilation calculations

Task Type Task

Membership Alexander Bothe

Description Create ventilation calculations for final design.

Due Date 30.07.2020

Parent

Parent Task Calculations

Due Date 26.06.2020

Responsible Bernhard Baas

Status Planned

Timeline

Search timeline

Enter a post...

Post by Christopher Maisk
Formular
29.06.2020 07:08

Email from Alexander Bothe
AW: Concerning ventilation calculations
Will do.Von: Günther Schmidt <gs.tecschmidt123@gmail.com> Gesendet: Freit...
Closed
24.06.2020 12:11

Email from Günther Schmidt
Concerning ventilation calculations
Hi Alexander, please send me the ventilation calculations once your finished. ...
Closed
06.03.2020 09:05

Note modified by Heidi Jans
Final Calculation
AX123X9_Calculation.pdf
18.12.2019 08:54

Post by Alexander Bothe
Hi Heidi Jans can you help me out here? Günther needs the calculations asap! ...
1 Person like this
18.12.2019 08:49

Reply by Heidi Jans
Sure, I'll attach it here for your review!
18.12.2019 08:53

Tags

Arbeit gestoppt Gebäude 2

Select tags...

Checklist Items

Completed: 3/3

☒ Send final draft to Günther

☒ Create calculation

☒ Review calculation

New item...

Create

kando kanDO kanDO > Contexts > Reconstruction Medical Center

Ventilation calculations

Save Save & Close + New Deactivate Delete Refresh Assign View Hierarchy Share Email a Link Follow Flow Word Templates Run Report

Ventilation calculations
kanDO

Reconstruction Medical Center Context 02 Preliminary design Iteration Active Lane Energy Category

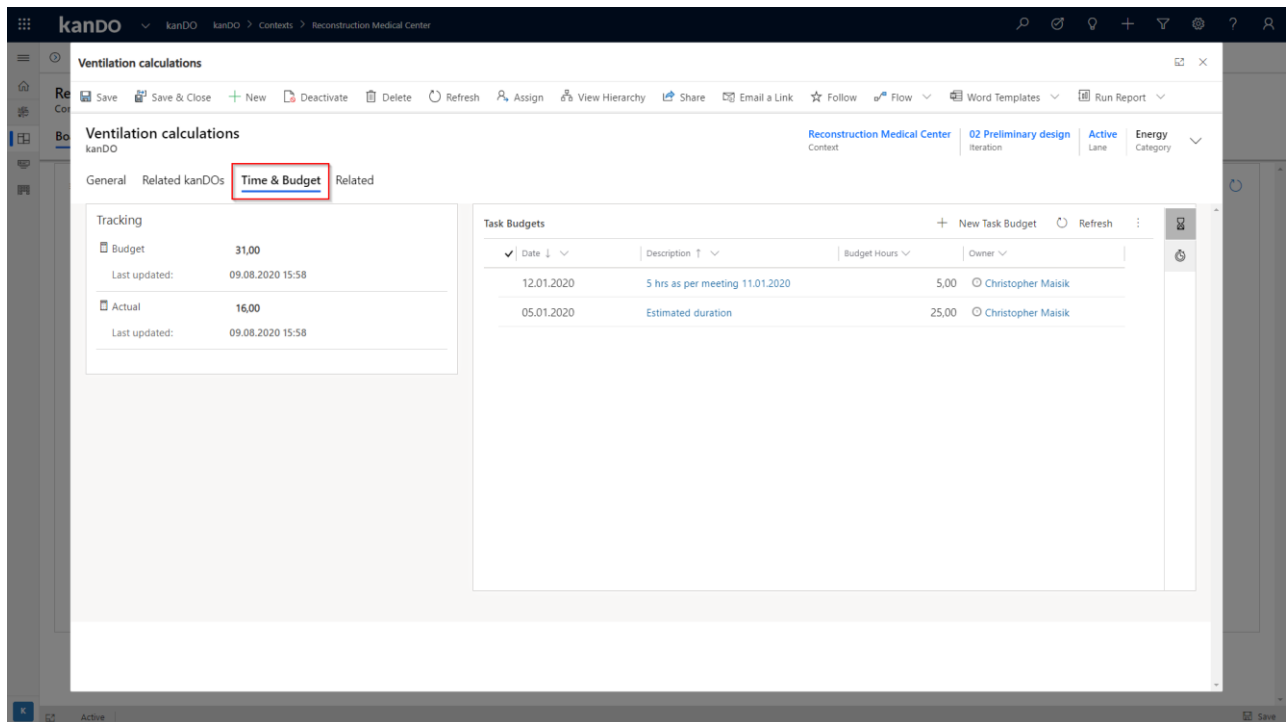
General Related kanDOs Time & Budget Related

No Filtering All

Identified Planned Active Done

Draft calculations

01. Apr 20



Tracking

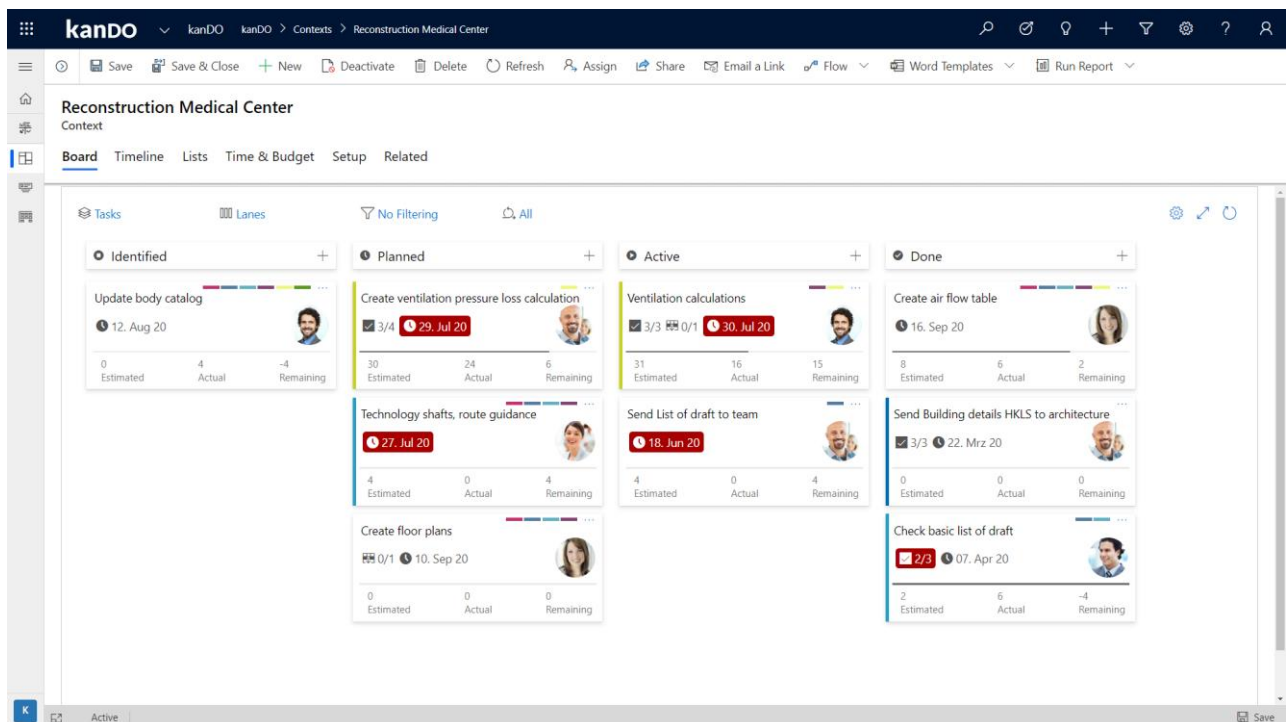
Budget	31,00
Last updated:	09.08.2020 15:58
Actual	16,00
Last updated:	09.08.2020 15:58

Task Budgets

✓	Date ↓	Description ↑	Budget Hours ↓	Owner ↓
	12.01.2020	5 hrs as per meeting 11.01.2020	5,00	Christopher Maisik
	05.01.2020	Estimated duration	25,00	Christopher Maisik

5.2.2.2 Kanban Board

On the *Kanban Board* or *Board* view, kanDOs are displayed as cards and can be moved between the different lanes via drag-and-drop. Use the many different grouping- and filtering options to personalize your experience and focus on your most important tasks.



Reconstruction Medical Center

Board | Timeline | Lists | Time & Budget | Setup | Related

Identified

- Update body catalog (12. Aug 20)

Planned

- Create ventilation pressure loss calculation (29. Jul 20)
- Technology shafts, route guidance (27. Jul 20)
- Create floor plans (10. Sep 20)

Active

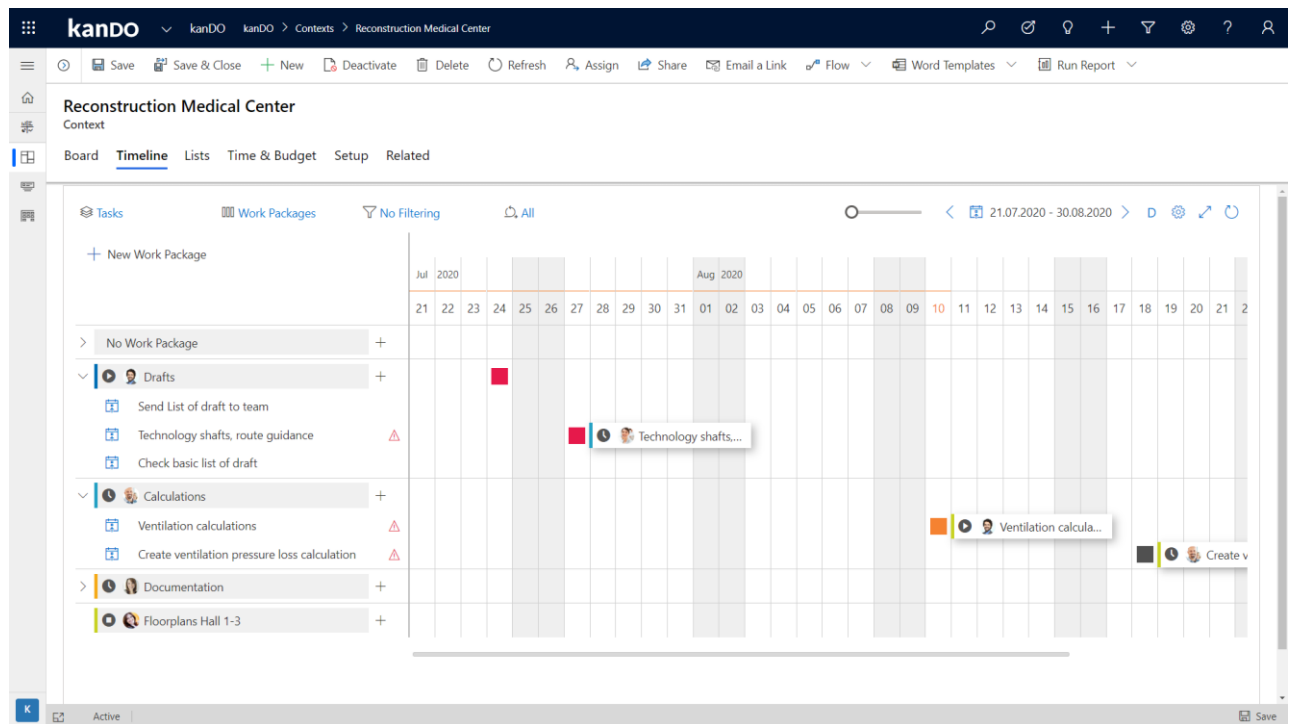
- Ventilation calculations (30. Jul 20)
- Send List of draft to team (18. Jun 20)

Done

- Create air flow table (16. Sep 20)
- Send Building details HKLS to architecture (22. Mrz 20)
- Check basic list of draft (07. Apr 20)

5.2.2.3 Timeline

On the *Timeline*, *kanDOs* can be viewed in relation to their related elements such as workpackages or iterations with the focus on their due-dates. Use the many different grouping- and filtering options to personalize your experience and focus on your most important tasks. The timeline too supports drag-and-drop functionality.



5.3 Virtual Boards

Virtual Boards provide the view of all your assigned tasks across all contexts. This view is read-only.

kando kanDO kanDO > Virtuelle Boards

Meine kanDOs Aufgaben Status Keine Filterung Alle

Home Letzte Angeheftet

Meine Arbeit Dashboards kanDO Kontexte kanDOs **Virtuelle Boards**

Neu

- Arbeitspakete und Verantwortliche definieren
27. Jul 20
Einführungsgesamt: Dynamics 365 for PSA
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Gab Analyse durchführen
10. Aug 20
Einführungsgesamt: Dynamics 365 for PSA
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Kickoff Workshop mit Key-Usern durchführen
03. Aug 20
Einführungsgesamt: Dynamics 365 for PSA
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Mobile App
1/2 0/2 10. Apr 20
Produkt Development
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Setup App Source Offer
03. Apr 20
Product Development
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Update body catalog
12. Aug 20
Reconstruction Medical Center
Geschätzt: 0 Tatsächlich: 4 Verbleibend: -4

Geplant

- Konzept: Anlage einer Aufgabe
0/1 16. Mrz 20
kanDO vliest
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Offline mode
2/3 06. Apr 20
Product Development
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Setup nurture campaign for clicked links
0/5 16. Feb 20
Marketing Campaign
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Sprint-Planung machen
31. Jul 20
Einführungsgesamt: Dynamics 365 for PSA
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Stellenanzeige wird nicht veröffentlicht
22. Jul 20
Customer Service Board
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Task 01
31. Mrz 20
kanDO vliest
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0

Aktiv

- Create Workflow: Send replies to sales team
2/3 22. Mrz 20
Marketing Campaign
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Kickoff Thank you mailing
1/2 16. Mrz 20
Marketing Campaign
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Munch, Sigrid - BIM Specialist - Berlin
2/3 31. Mrz 20
Recruiting Board
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Produktivumgebung CRM nicht erreichbar
23. Jul 20
Customer Service Board
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Ventilation calculations
3/3 0/1 16. Aug 20
Reconstruction Medical Center
31 Geschätzt: 16 Tatsächlich: 15 Verbleibend: 0

Abgeschlossen

- Find caterer
1/1 22. Feb 20
Marketing Campaign
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- Mustermann, Max - Unsolicited application - Architecture
19. Apr 20
Recruiting Board
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0
- New product line
19. Mrz 20
Product Development
Geschätzt: 0 Tatsächlich: 0 Verbleibend: 0

(Kein)

kando