

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.

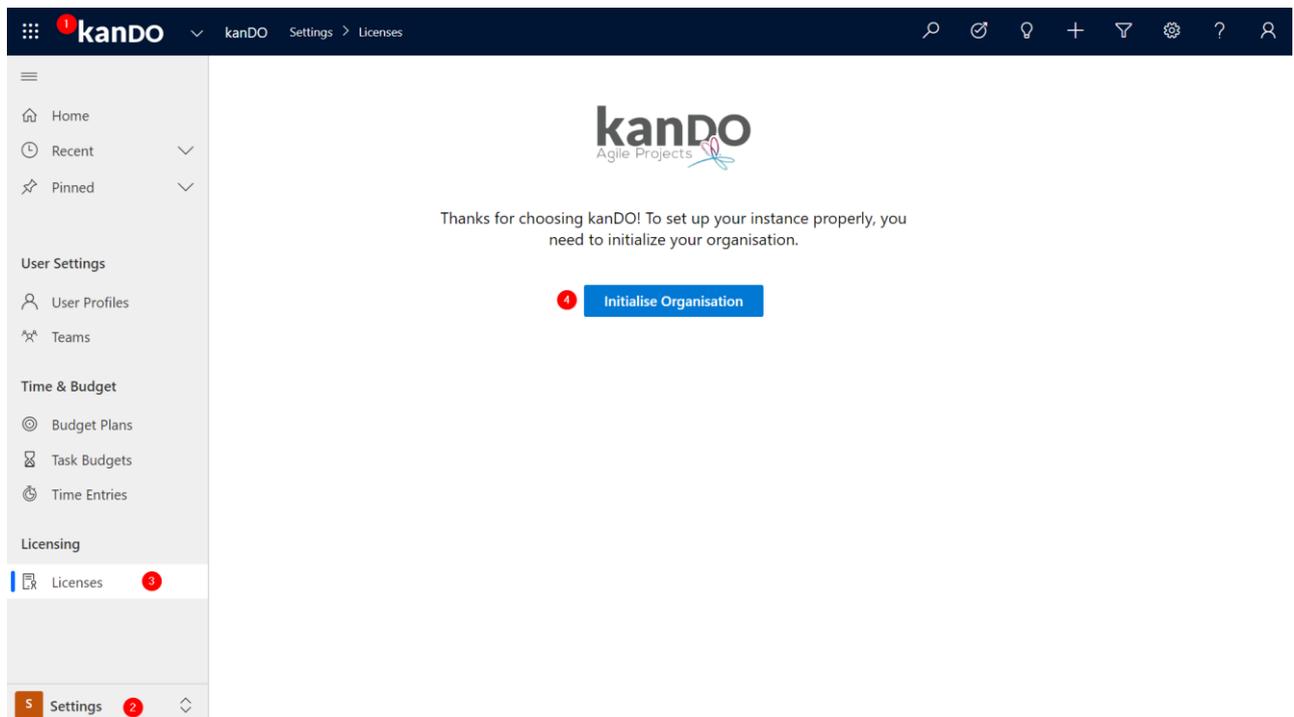
The use of kanDO | Agile Projects is certainly not limited to the project realm and can either be used as a dedicated solution for managing tasks or easily be integrated to any other Dynamics 365 first party app.

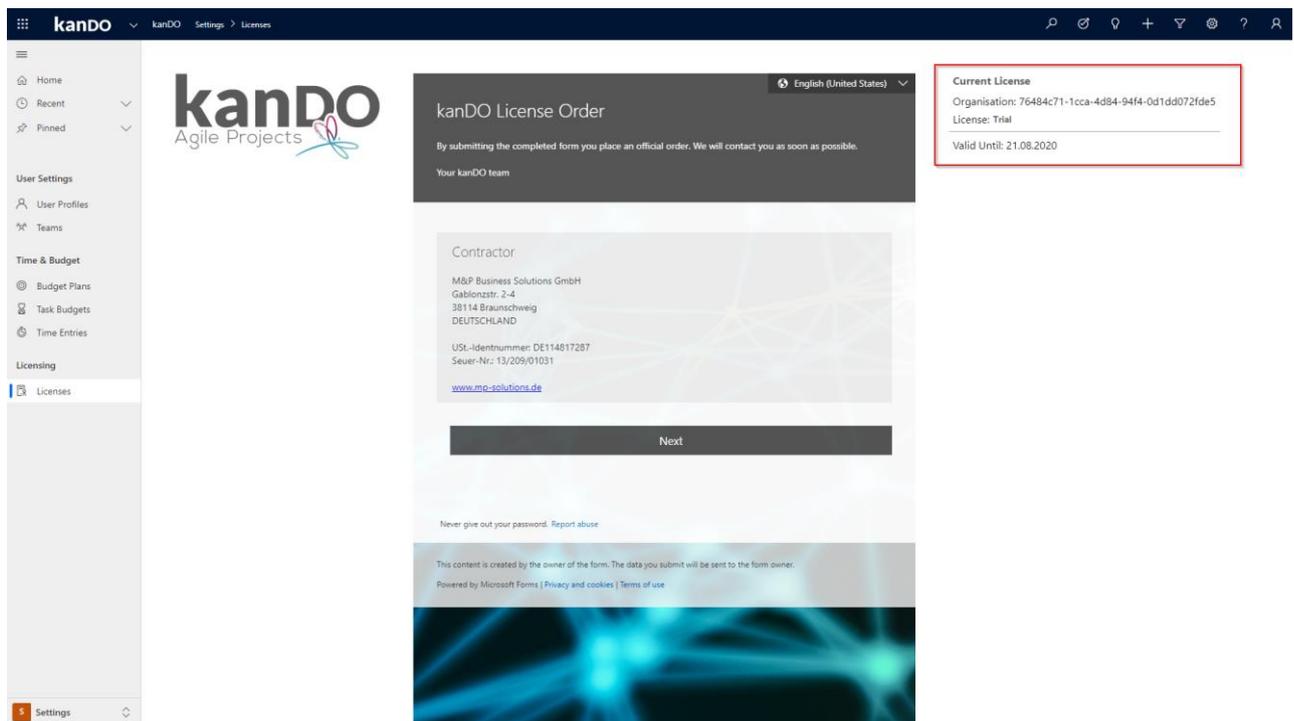
This document contains explanations only for the most basic configurations and features. It is not meant to be an exhaustive product documentation.

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

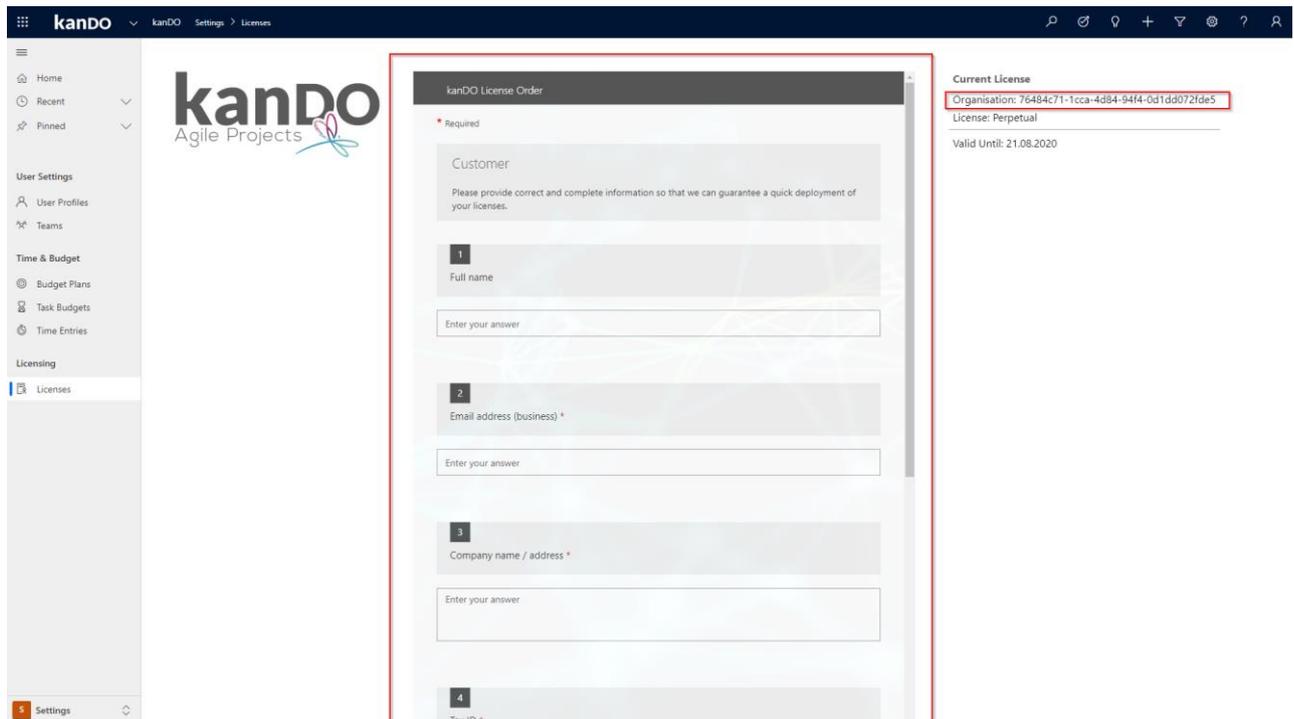




Current License
Organisation: 76484c71-1cca-4d84-94f4-0d1dd072fde5
License: Trial
Valid Until: 21.08.2020

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 primarily 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 Dynamics 365 environment.*

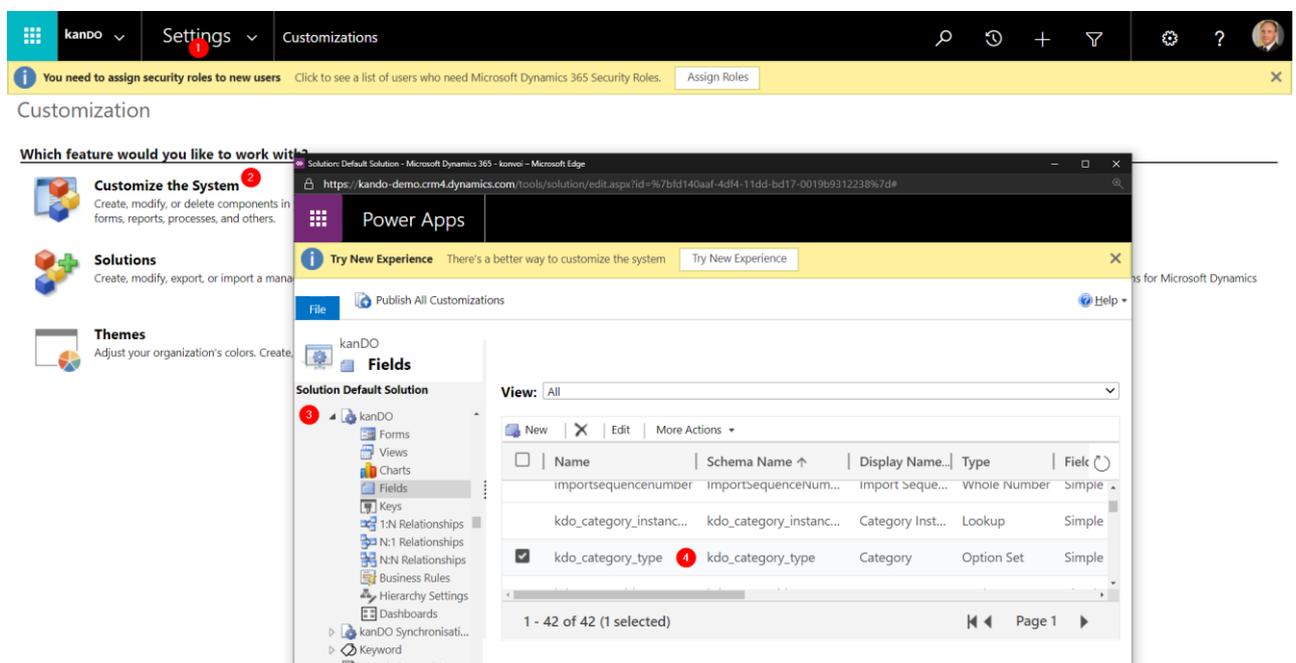
4 CUSTOMIZATIONS

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.

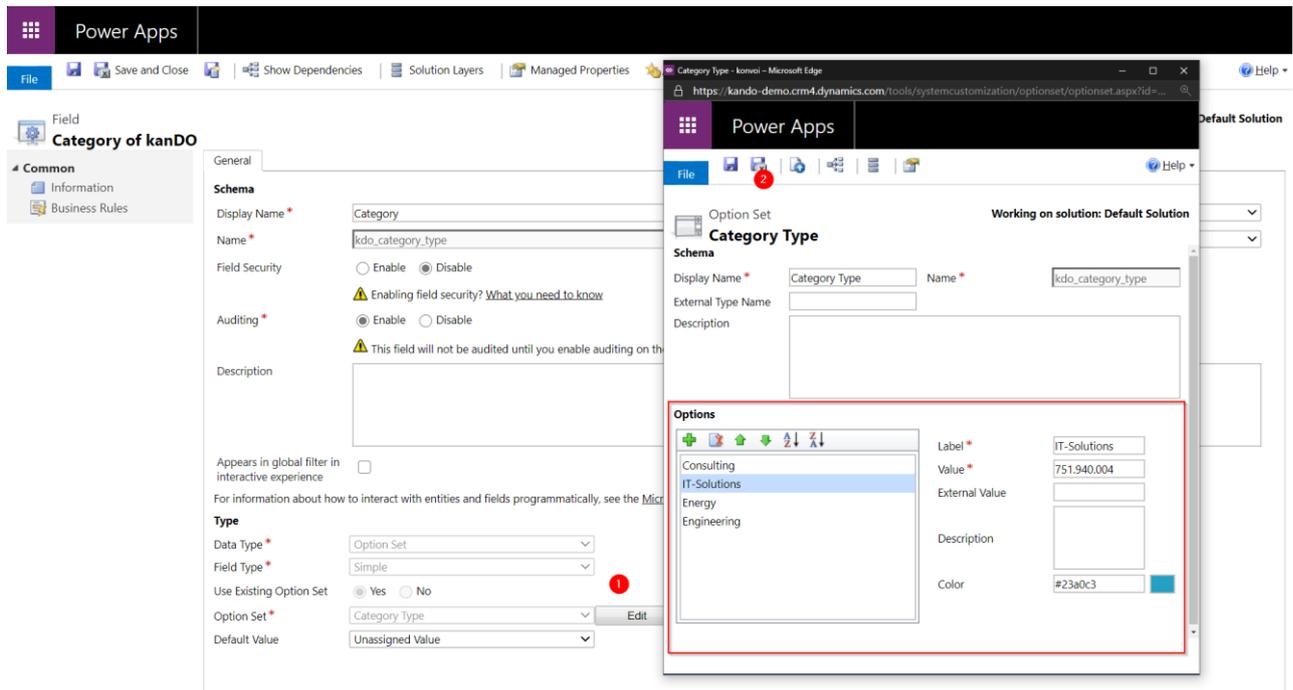
1. Open the Dynamics 365 Settings
2. Go to *Customize the system*
3. Open the *kanDO* entity
4. Open the *kdo_category_type* field
5. Edit the option set
6. Save and publish the customizations



The screenshot shows the Dynamics 365 Customization 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'. The main area is titled 'Customization' and features a sidebar with options: 'Customize the System', 'Solutions', and 'Themes'. The 'Fields' section is expanded, showing a list of fields for the 'kanDO' entity. The 'kdo_category_type' field is selected, and its details are shown in the main pane. The field is of type 'Option Set' and is simple. The table below shows the list of fields:

Name	Schema Name	Display Name	Type	Field
importsequencenumber	importsequenceNum...	Import Seque...	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

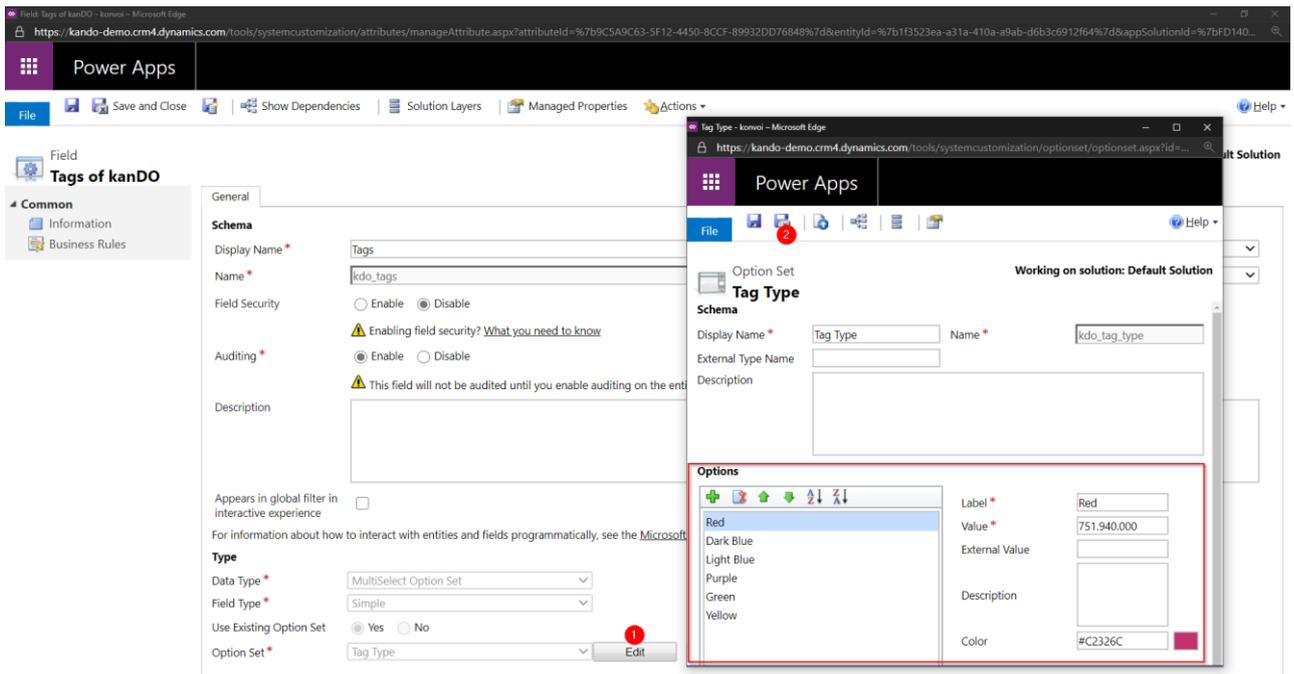
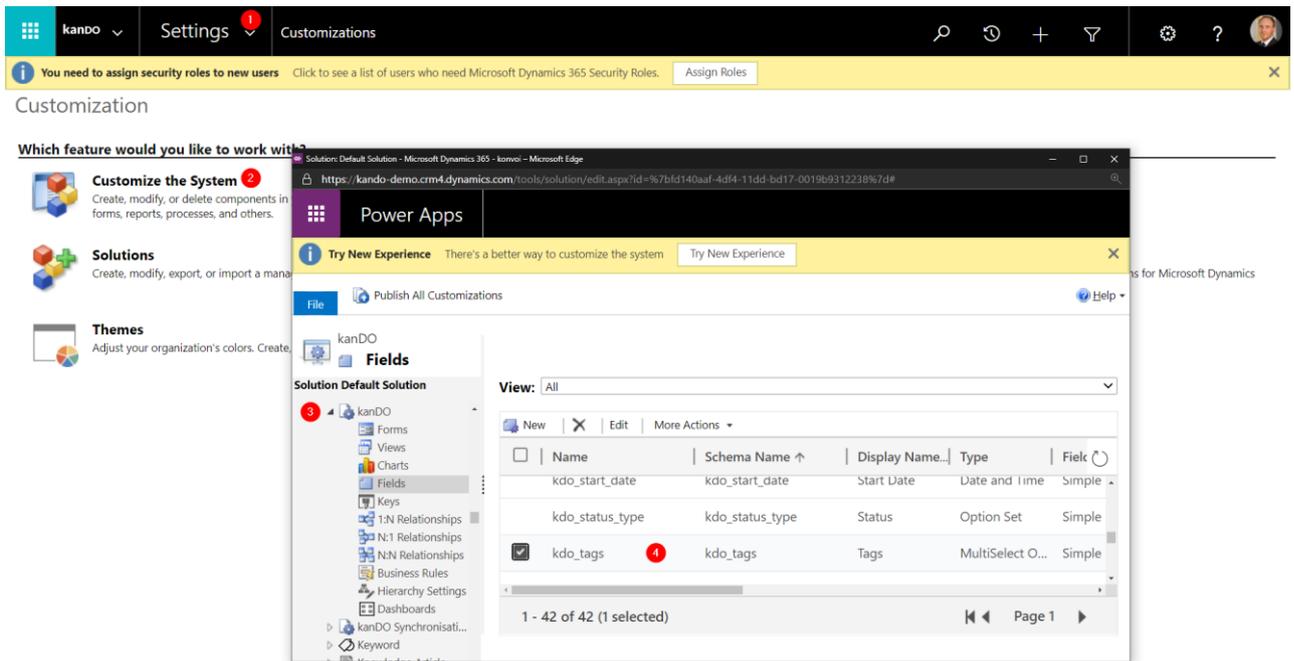
The bottom of the table indicates '1 - 42 of 42 (1 selected)' and 'Page 1'.



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



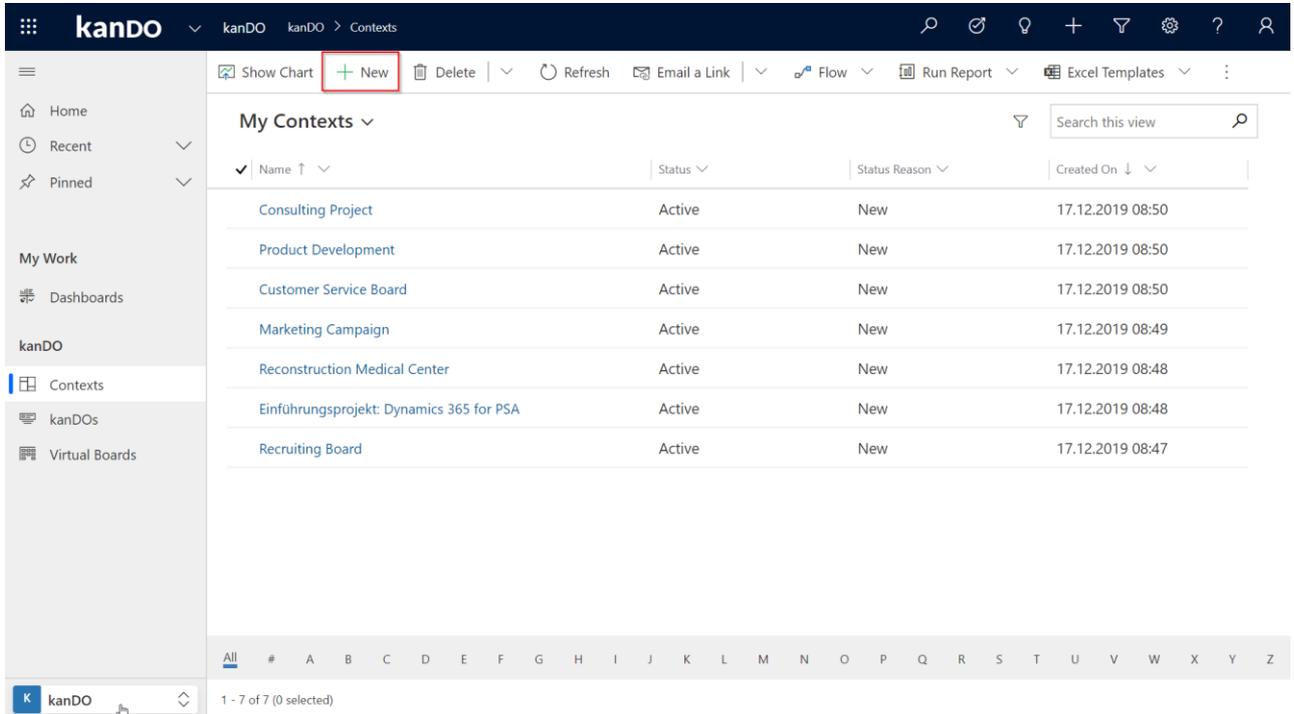
5 FEATURES

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

5.1 Contexts

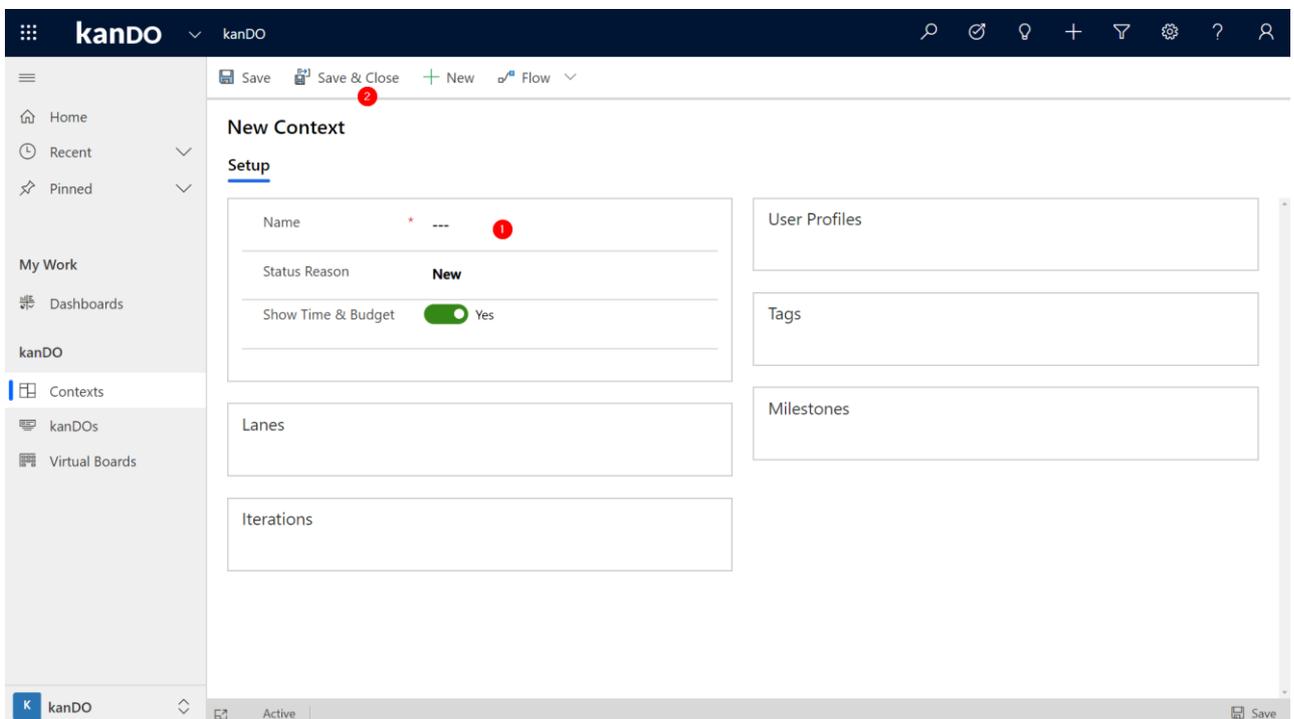
Contexts serve as „containers“ for managing any amount of tasks for a projects.

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 '+ New' button is highlighted with a red box. The table below lists existing contexts:

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



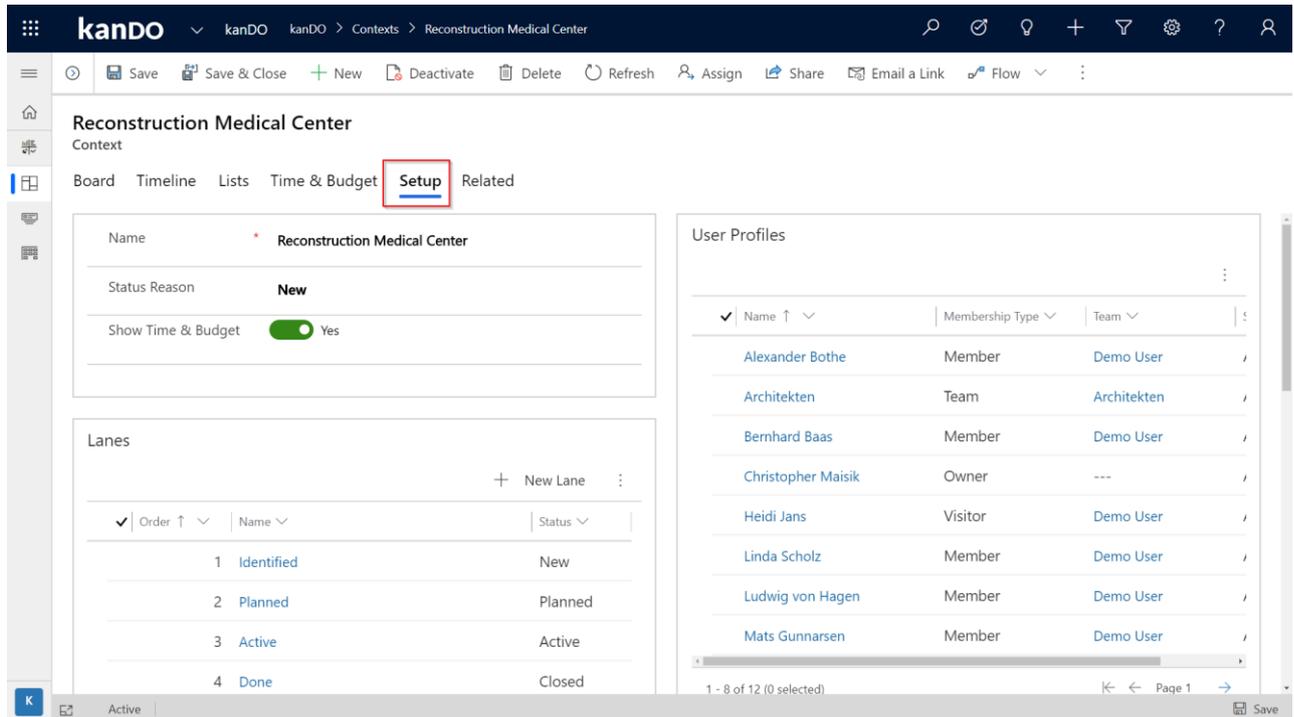
The screenshot shows the 'New Context' setup form in the kando application. The 'Name' field is marked with a red asterisk and a red circle with the number 1. The 'Save & Close' button is marked with a red circle with the number 2. The form includes the following fields:

- Name: * --- (1)
- Status Reason: **New**
- Show Time & Budget: Yes
- User Profiles
- Tags
- Milestones
- Lanes
- Iterations

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



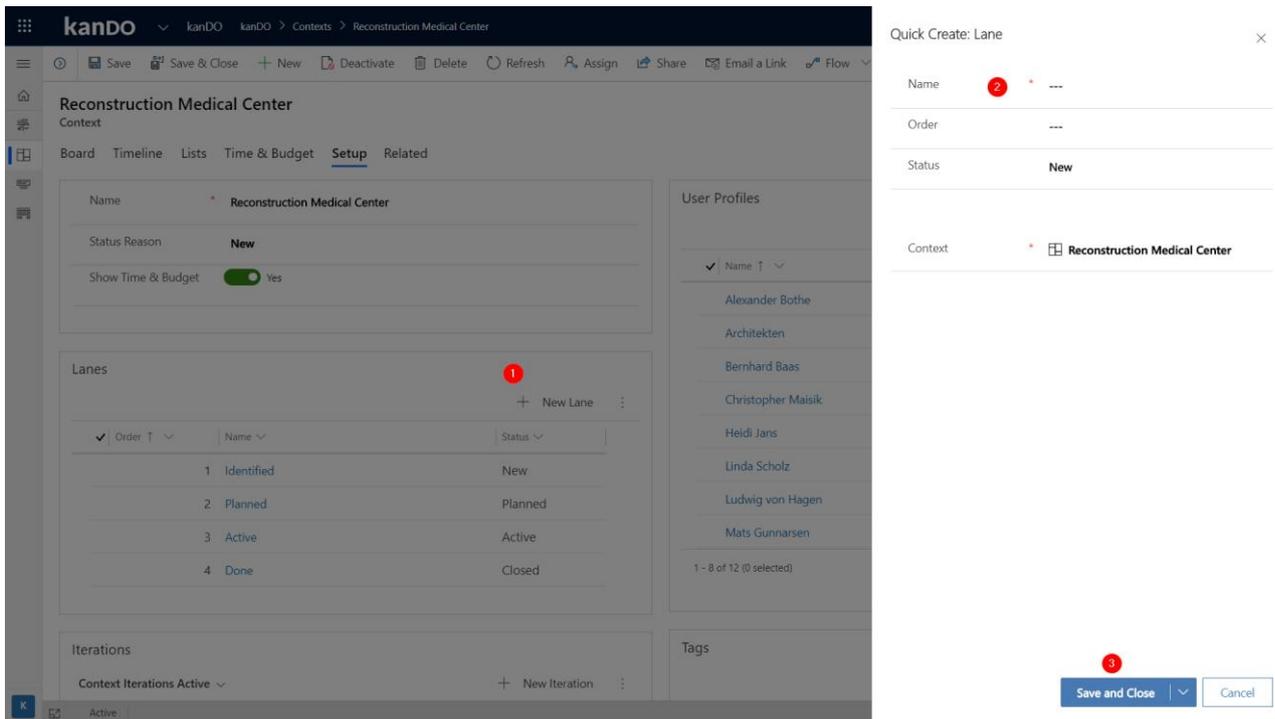
The screenshot shows the 'kando' interface for the 'Reconstruction Medical Center' context. The 'Setup' tab is selected and highlighted with a red box. The interface includes a top navigation bar with various actions like Save, New, Deactivate, Delete, Refresh, Assign, Share, and Email a Link. Below the navigation bar, the context name 'Reconstruction Medical Center' is displayed, along with tabs for Board, Timeline, Lists, Time & Budget, Setup, and Related. The 'Setup' tab contains several fields: 'Name' (Reconstruction Medical Center), 'Status Reason' (New), and 'Show Time & Budget' (Yes). Below these fields is a 'Lanes' subgrid with a 'New Lane' button and a table with columns for Order, Name, and Status. The 'User Profiles' table is also visible, listing users and their membership types.

Name	Membership Type	Team
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
Mats Gunnarsen	Member	Demo User

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.

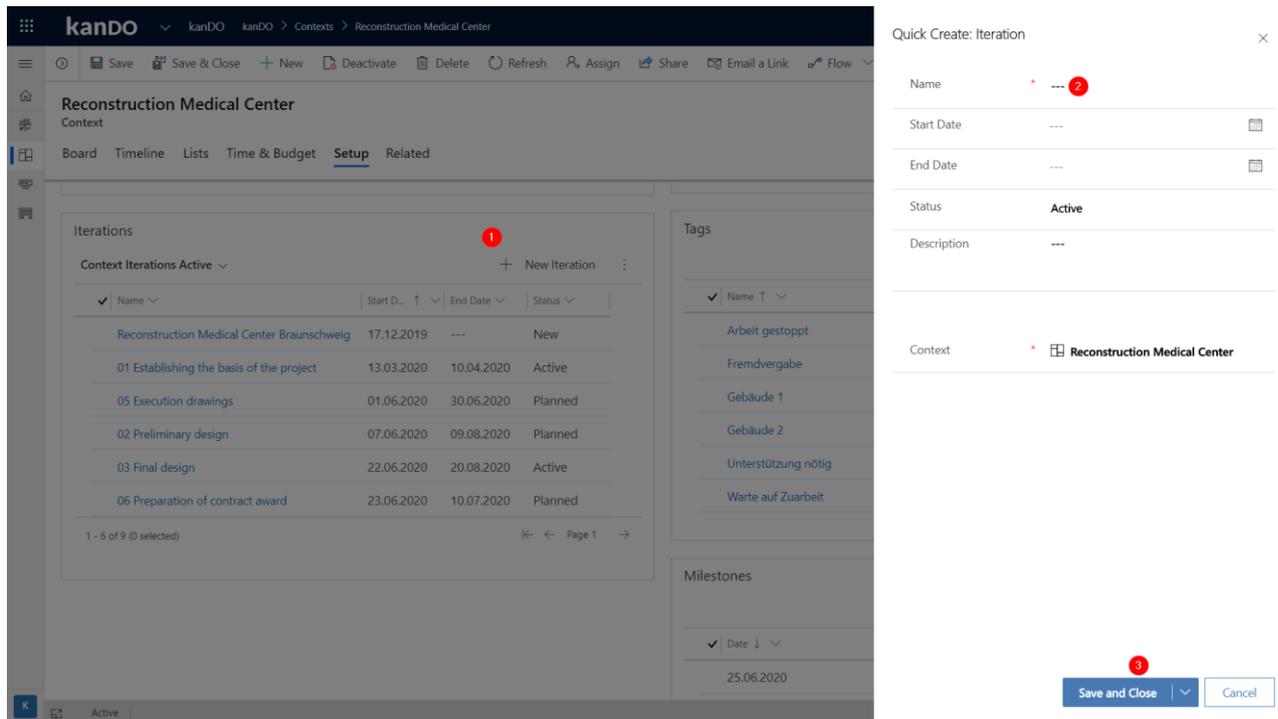


The screenshot shows the 'kando' software interface for the 'Reconstruction Medical Center' context. The 'Setup' tab is active, showing fields for Name, Status Reason, and Show Time & Budget. The 'Lanes' subgrid is highlighted with a red circle '1'. A 'Quick Create: Lane' dialog box is open on the right, with a red circle '2' on the 'Name' field. At the bottom right, a 'Save and Close' button is highlighted with a red circle '3'.

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



The screenshot shows the 'kando' software interface for the 'Reconstruction Medical Center' context. A 'Quick Create: Iteration' dialog box is open, allowing users to create a new iteration. The dialog includes the following fields:

- Name: --- (with a red circle '2' next to it)
- Start Date: ---
- End Date: ---
- Status: Active
- Description: ---
- Context: Reconstruction Medical Center

At the bottom of the dialog, there is a 'Save and Close' button (with a red circle '3' next to it) and a 'Cancel' button. The background shows a table of iterations with columns for Name, Start Date, End Date, and Status.

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.

The screenshot shows the 'Reconstruction Medical Center' context setup page in the kando software. The page includes sections for 'Name', 'Status Reason', 'Show Time & Budget', 'Lanes', 'Iterations', and 'Tags'. A 'Quick Create: User Profile' dialog box is open, showing fields for 'Membership Type' (Member), 'Profile User', and 'Context' (Reconstruction Medical Center). A red circle and arrow point to the 'New User Profile' button in the top right corner of the dialog box.

5.1.1.4 Milestones

Create milestones that'll be added on the timeline.

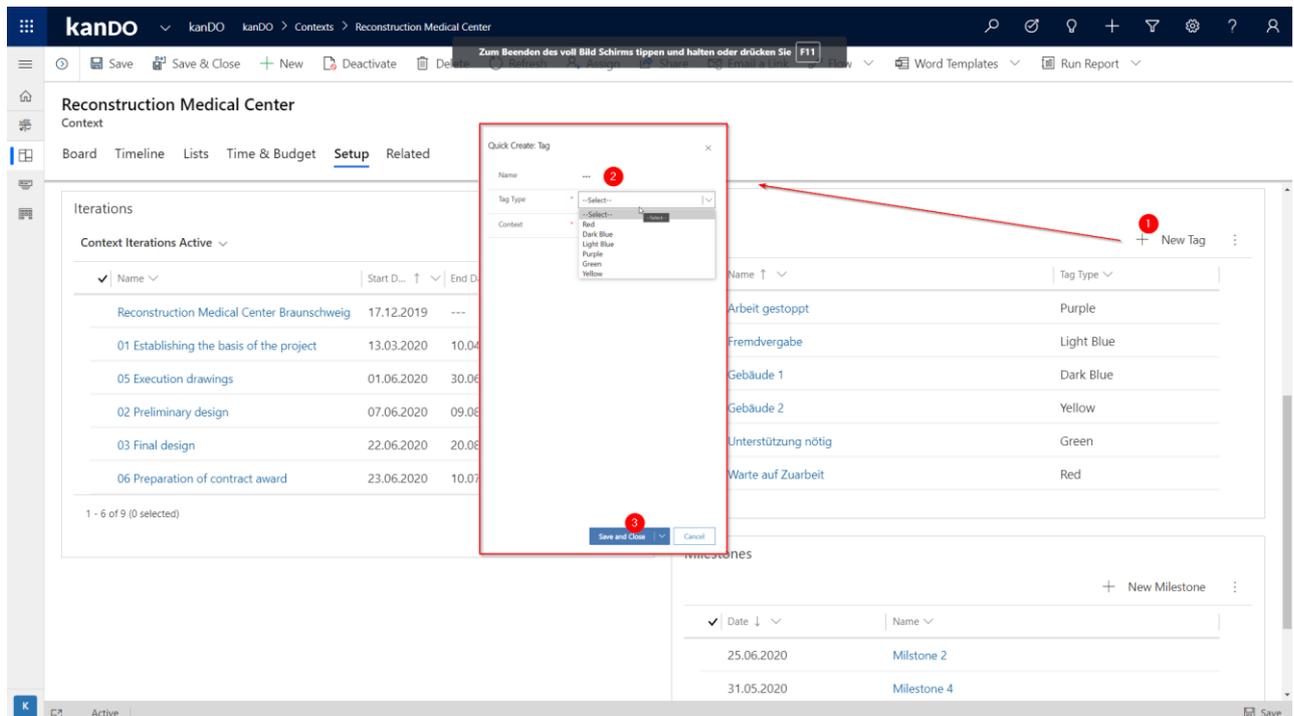
1. Click the *New* button on the *Milestones* subgrid to create milestones and add them to the context
2. All created milestones will appear in the *Timeline*

The screenshot shows the 'Reconstruction Medical Center' context setup page in the kando software. The page includes sections for 'Name', 'Status Reason', 'Show Time & Budget', 'Lanes', 'Iterations', and 'Tags'. A 'Quick Create: Milestone' dialog box is open, showing fields for 'Date', 'Name', and 'Context' (Reconstruction Medical Center). A red circle and arrow point to the 'New Milestone' button in the top right corner of the dialog box.

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

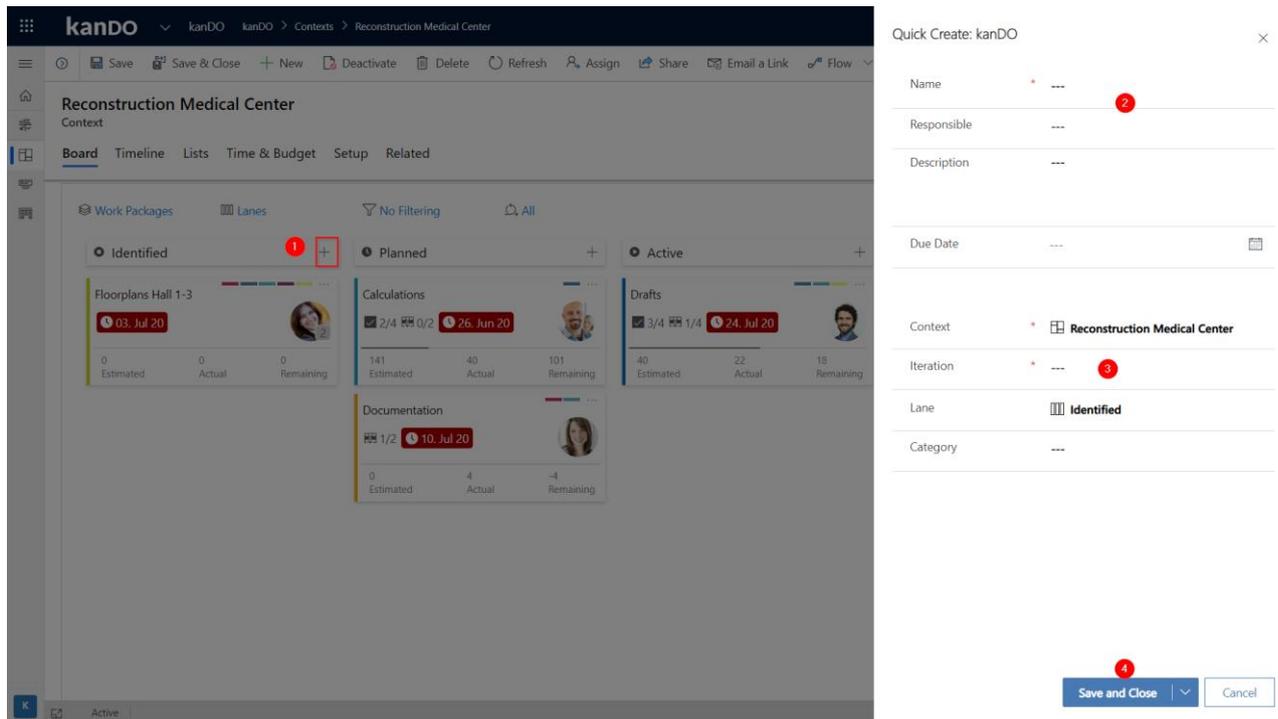


5.2 kanDOs

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*



The screenshot shows the kando Kanban Board for the 'Reconstruction Medical Center' context. The board is divided into three lanes: 'Identified', 'Planned', and 'Active'. Each lane contains task cards with progress bars and due dates. A 'Quick Create: kanDO' form is overlaid on the right side of the board. The form has several fields: 'Name', 'Responsible', 'Description', 'Due Date', 'Context', 'Iteration', 'Lane', and 'Category'. Red circles with numbers 1 through 4 highlight specific elements: 1 points to a plus sign in the 'Identified' lane; 2 points to the 'Name' field; 3 points to the 'Iteration' field; and 4 points to the 'Save and Close' button at the bottom of the form.

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

Reconstruction Medical Center | 02 Preliminary design | Active | Energy

kanDO Context Iteration Lane Category

General **Related kanDOs** Time & Budget Related

Ventilation calculations

Task Type: Task

Membership: Alexander Bothe

Description: Create ventilation calculations for final design.

Due Date: 30.07.2020

Parent Task: Calculations

Due Date: 26.06.2020

Responsible: Bernhard Baas

Status: Planned

Timeline

Search timeline

Enter a post...

- Post by Christopher Maisik (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... - 24.06.2020 12:11)
- Email from Günther Schmidt (Concerning ventilation calculations Hi Alexander, please send me the ventilation calculations once your finished. ... - 06.03.2020 09:05)
- Note modified by Heidi Jans (Final Calculation AX123XB_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! ... - 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

Reconstruction Medical Center | 02 Preliminary design | Active | Energy

kanDO Context Iteration Lane Category

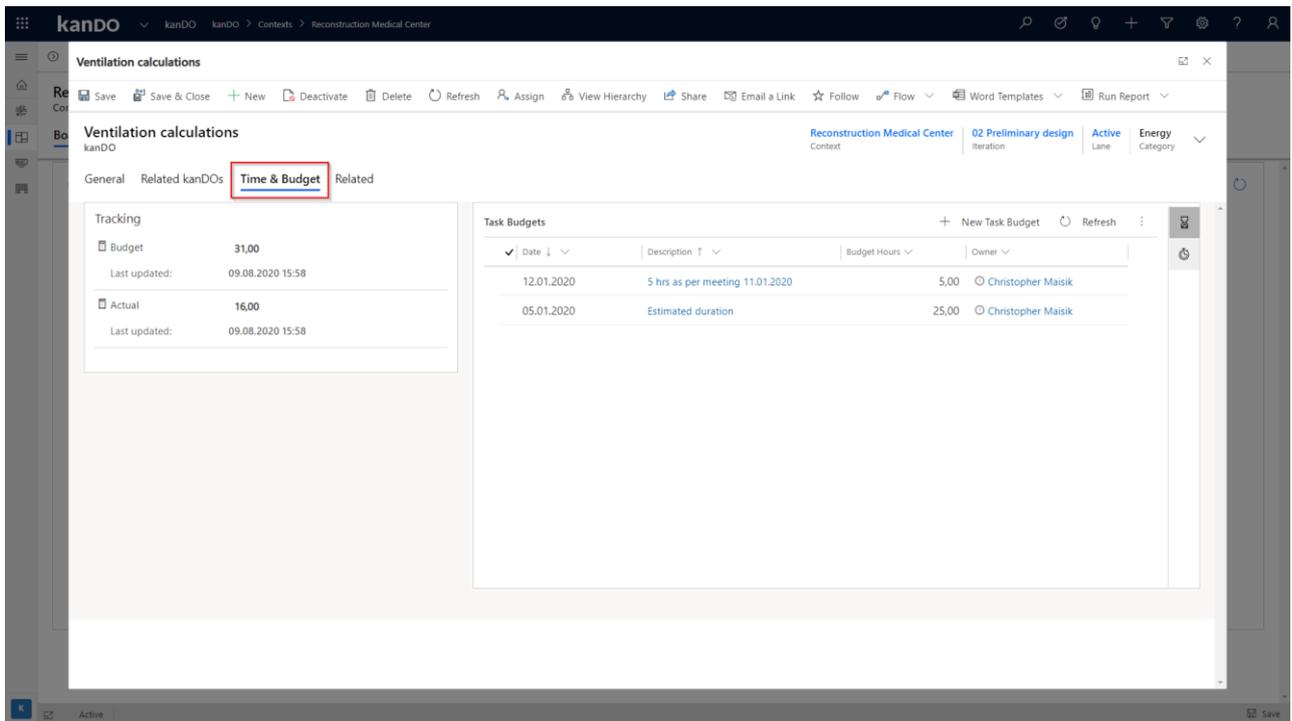
General **Related kanDOs** Time & Budget Related

No Filtering All

Identified Planned Active Done

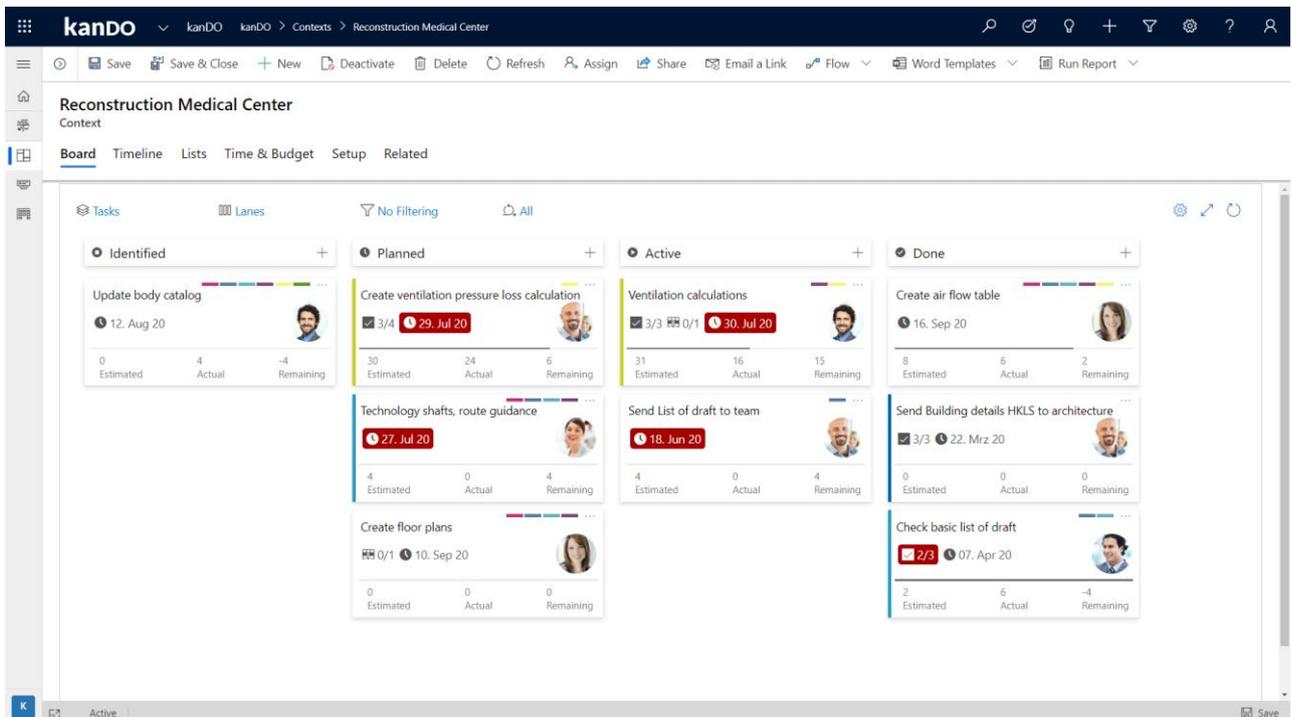
Draft calculations

01. Apr 20



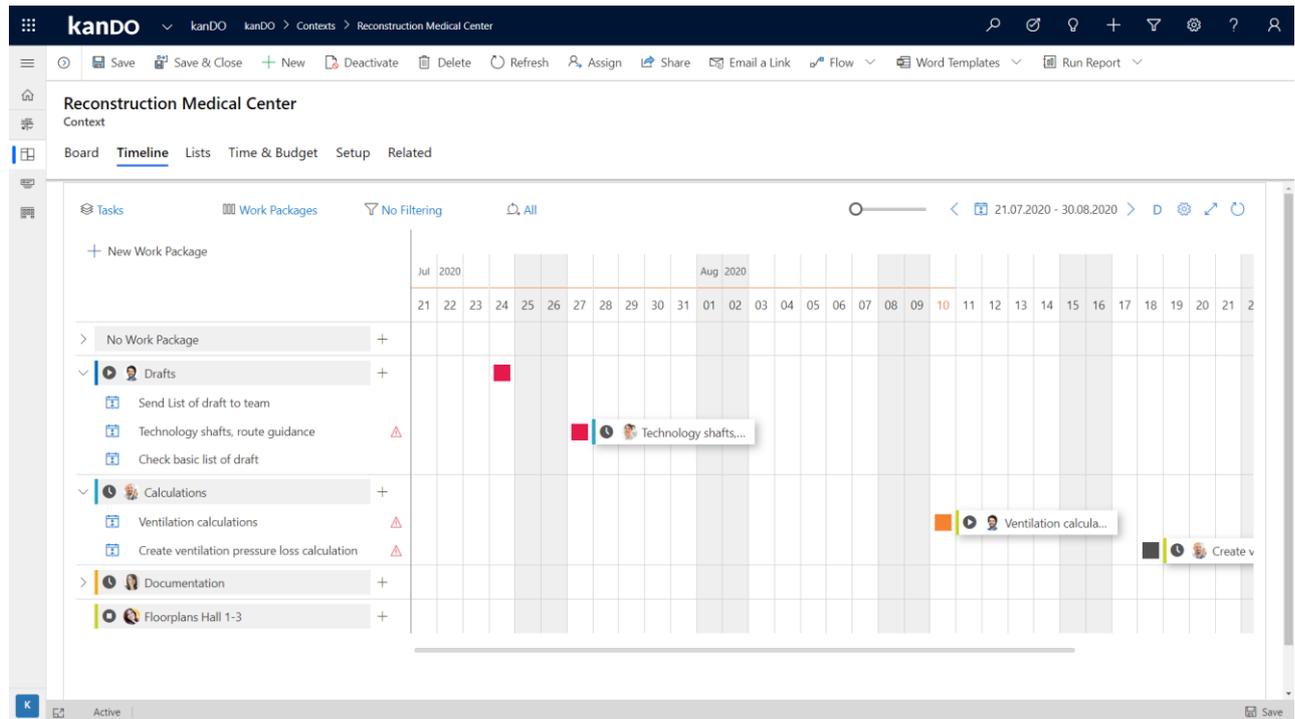
5.2.2.2 Kanban Board

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.



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 Virtuelle Boards

Meine kanDOs Aufgaben Status Keine Filterung Alle

Home Letzte Angeheftet

Meine Arbeit Dashboards kanDO Kontexte kanDOs Virtuelle Boards

Neu Geplant Aktiv Abgeschlossen (Kein)

Arbeitspakete und Verantwortliche definieren
27. Jul 20
Einführungsprojekt: Dynamics 365 for PSA

Geb Analyse durchführen
10. Aug 20
Einführungsprojekt: Dynamics 365 for PSA

Kickoff Workshop mit Key-Usern durchführen
03. Aug 20
Einführungsprojekt: Dynamics 365 for PSA

Mobile App
1/2 0/2
10. Apr 20
Produkt Development

Setup App Source Offer
03. Apr 20
Produkt Development

Update body catalog
12. Aug 20
Reconstruction Medical Center

Konzept: Anlage einer Aufgabe
0/1
16. Mrz 20
kanDO v1heet

Offline mode
2/3
06. Apr 20
Produkt Development

Setup nurture campaign for cicked links
0/5
16. Feb 20
Marketing Campaign

Sprint-Planung machen
31. Jul 20
Einführungsprojekt: Dynamics 365 for PSA

Stellenanzeige wird nicht veröffentlicht
22. Jul 20
Customer Service Board

Task 01
31. Mrz 20
kanDO v1heet

Create Workflow: Send replies to sales team
2/3
22. Mrz 20
Marketing Campaign

Kickoff Thank you mailing
1/2
16. Mrz 20
Marketing Campaign

Munch, Sigrid - BIM Specialist - Berlin
2/3
31. Mrz 20
Recruiting Board

Produktivumgebung CRM nicht erreichbar
23. Jul 20
Customer Service Board

Ventilation calculations
3/3 0/1
10. Aug 20
Reconstruction Medical Center

Find caterer
1/1
22. Feb 20
Marketing Campaign

Mustermann, Max - Unsolicited application - Architecture
15. Apr 20
Recruiting Board

New product line
15. Mrz 20
Produkt Development

Geschätzt Tatsächlich Verbleibend

kanDO