
Kanban Task Manager for Outlook Manual

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1 INTRODUCTION

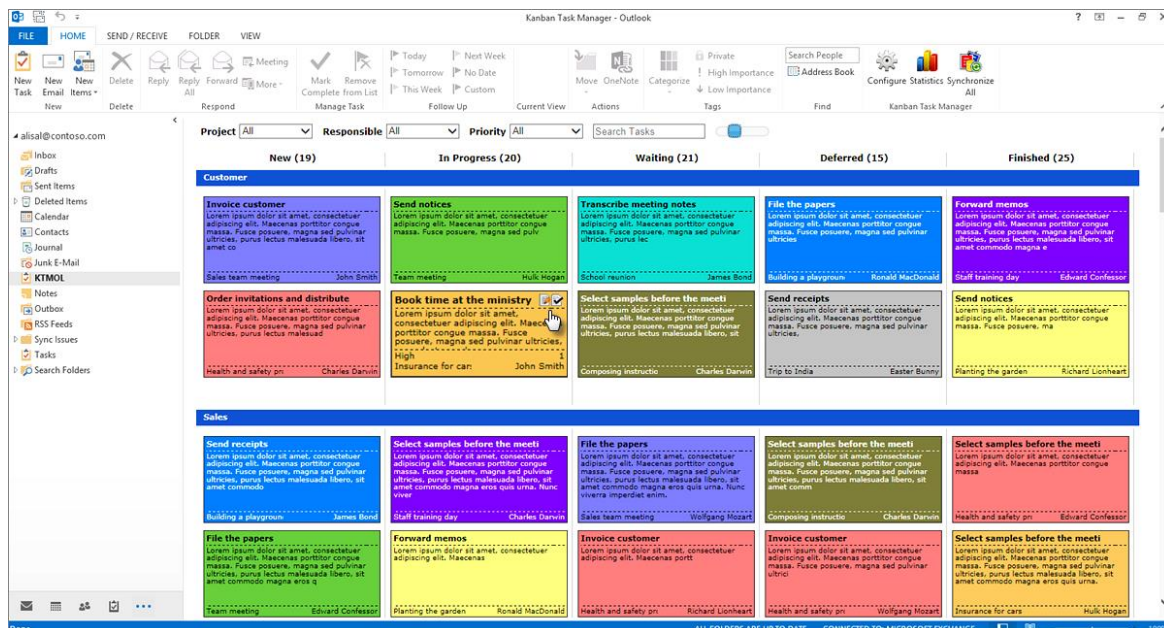
Kanban Task Manager helps a **workgroup** co-operate on projects and tasks inside Outlook. The software visualizes the work with Outlook tasks and makes it easy for a workgroup to manage projects.

All the ongoing projects can be seen in Outlook on all PCs, and when one member of the group creates a new task, changes a task or drags it to another project phase or to a new place within the same phase, all the other group members can see it on their PCs also.

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

Moving the kanban board into Outlook gives you everything in the computer, and no cards are lost because they fall to the floor or someone takes them away to make a note. On top of that the developers of kalmstrom.com Business Solutions have added several useful features:

- **Drag and drop tasks** between or within different phases and lanes of a project.
- **Color code** tasks by project or responsible.
- **Filter** tasks by project, responsible and/or priority and also by a custom value if it is used.
- **Automatic and silent synchronization** of tasks within the workgroup, so everything is always up to date and everyone can see what is happening. Also manual sync.
- Convert e-mails into tasks.
- Support for **inline images** and **HTML formatting** in the task body (Outlook 2010 and above).
- Display of tasks for **multiple projects** in one Kanban board.
- Possibility to create **swim lanes**.
- A **reading pane** gives more info about the task than the short text visible on the card.



1.1 LANGUAGES

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

1.2 REQUIREMENTS

To use *Kanban Task Manager* you need to have Outlook installed on a PC. For the sharing you also need access to either a network folder – the Access option – or an SQL Server database or SharePoint site (in-house or hosted).

1.3 SYSTEMS

Kanban Task Manager works with:

- Microsoft Office 2007, 2010 or 2013 (32- and 64-bit) and Office 365 Outlook. (Outlook 2007 does not support inline images and HTML formatting in the task body.)
- Microsoft Windows Vista, 7, 8 and 10
- Microsoft SharePoint 2010 and 2013 and Office 365 SharePoint
- All versions of Microsoft Access and SQL Server
- Internet Explorer 9 or higher

To use *Kanban Task Manager* you must 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 8, and Office 2013, English version.

2 INSTALLATION OF KANBAN TASK MANAGER

2.1 INTRODUCTION

Kanban Task Manager is installed in an Outlook task folder that will synchronize with the shared database/SharePoint lists to update tasks and settings. The *Kanban Task Manager* Outlook folder is created when the user clicks on the Settings button in Outlook for the first time.

There is no server side installation and no need for a public folder or shared mailbox. **Outlook should be closed** during the installation.

NOTE: the **Single** version of *Kanban Task Manager for Outlook* must **not** be installed on the PC where you install this Workgroup version.

2.2 PROCESS

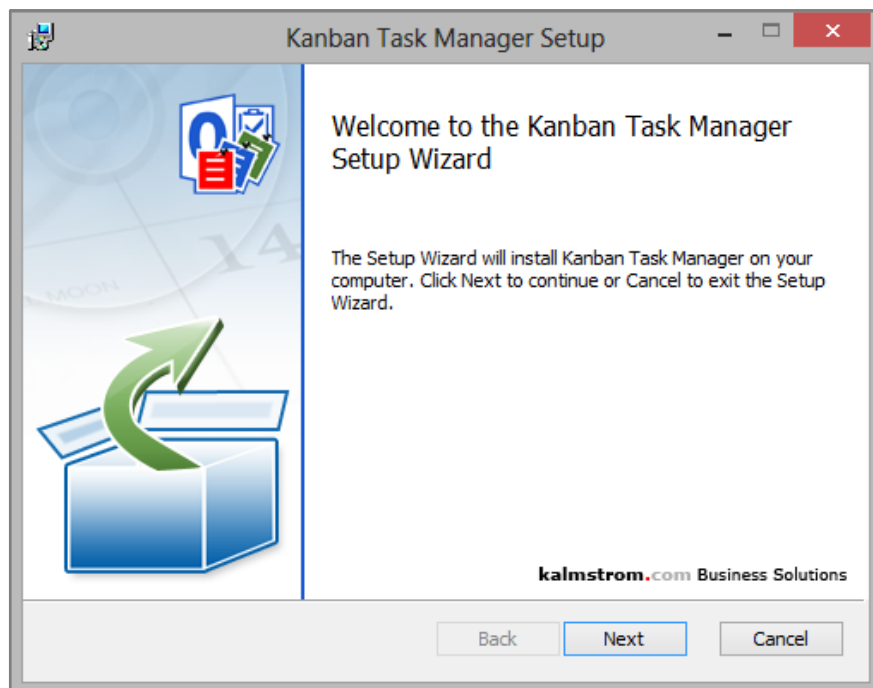
Download the file **KanbanTaskManagerSetup** in .msi or .zip format from the kalmstrom.com website (<http://www.kalmstrom.com/products/TaskManager/KTMOutlook/DownloadOL.htm>) to any folder on your PC. Extract the file if you selected to download the zipped file.

When you run the downloaded file, **KanbanTaskManagerSetup.msi**, and are asked if you want to install, please confirm that the file is digitally signed by Kalmstrom Enterprises AB, the company behind the brand kalmstrom.com Business Solutions. If the file is not digitally signed, you should not run it. See step 5 below.

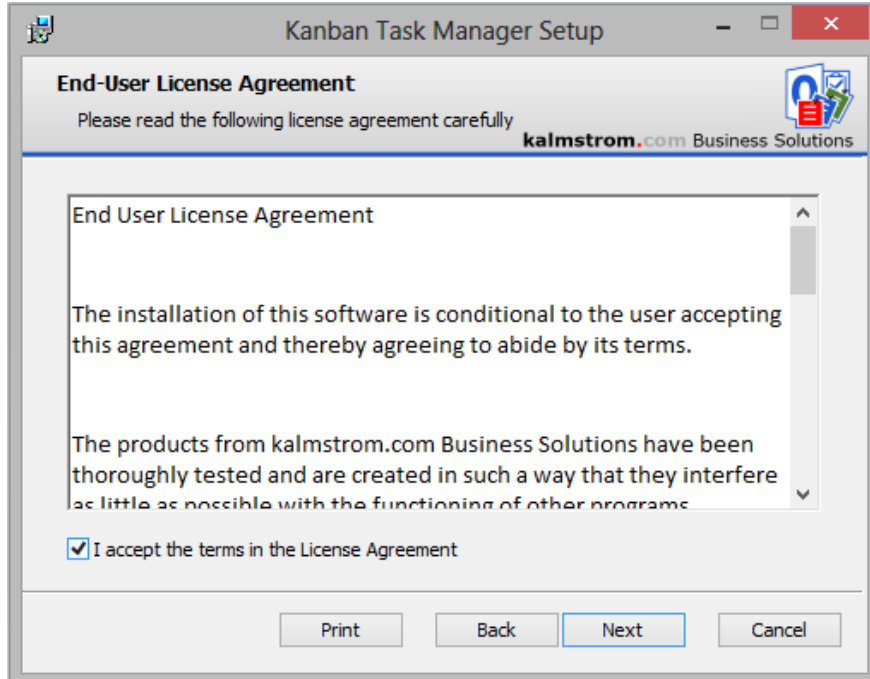
When you have clicked the **KanbanTaskManagerSetup.msi** file and accepted the license agreements, the file handles the installation by itself. By default the *Kanban Task Manager* files are installed under **Program files (x86)/kalmstrom.com/Kanban Task Manager**, and if you accept this location there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

These are the steps:

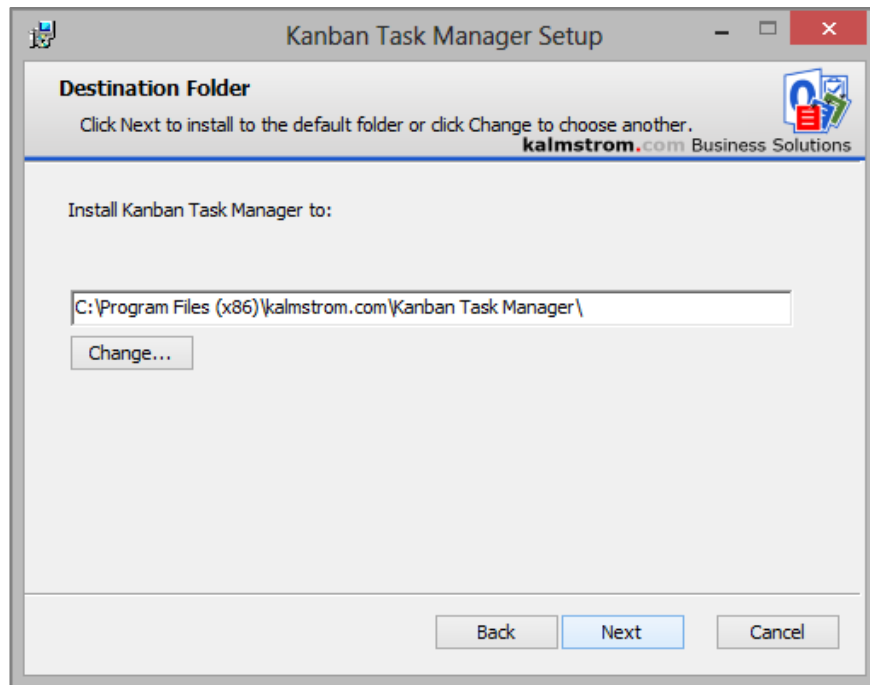
1. Welcome



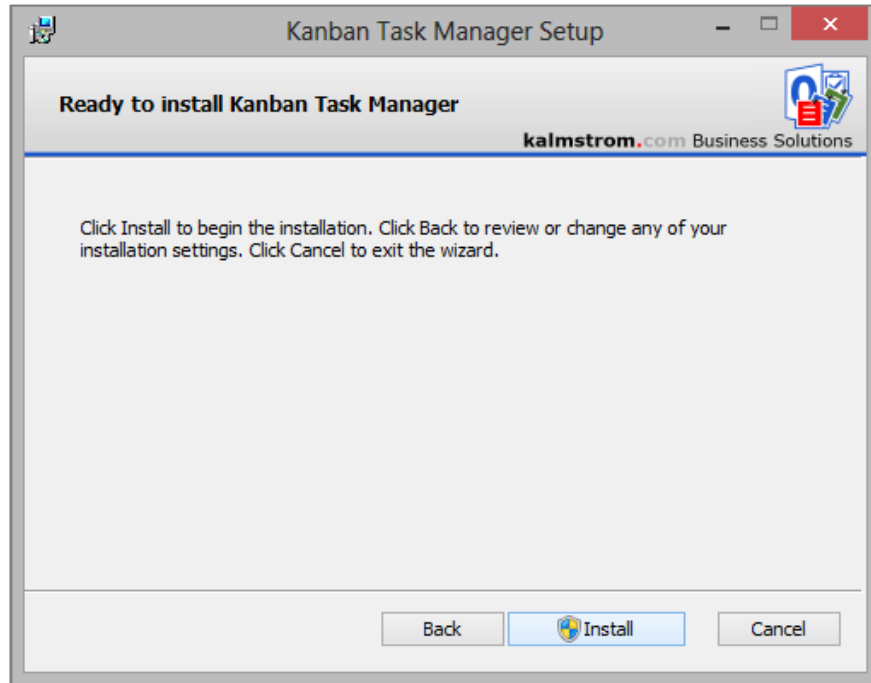
2. Accept the License Agreement



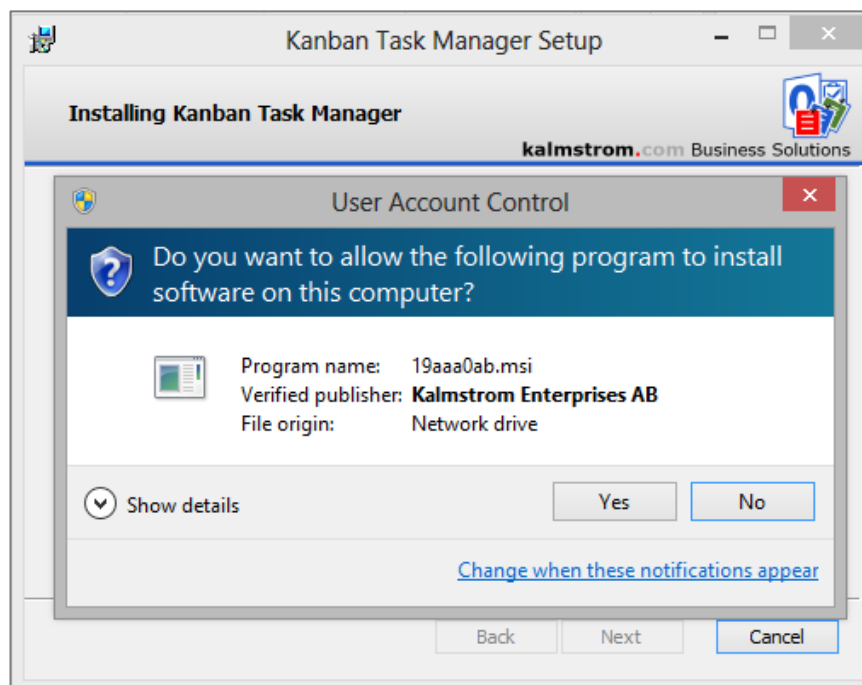
3. Select installation folder – or use the default one under Program files.



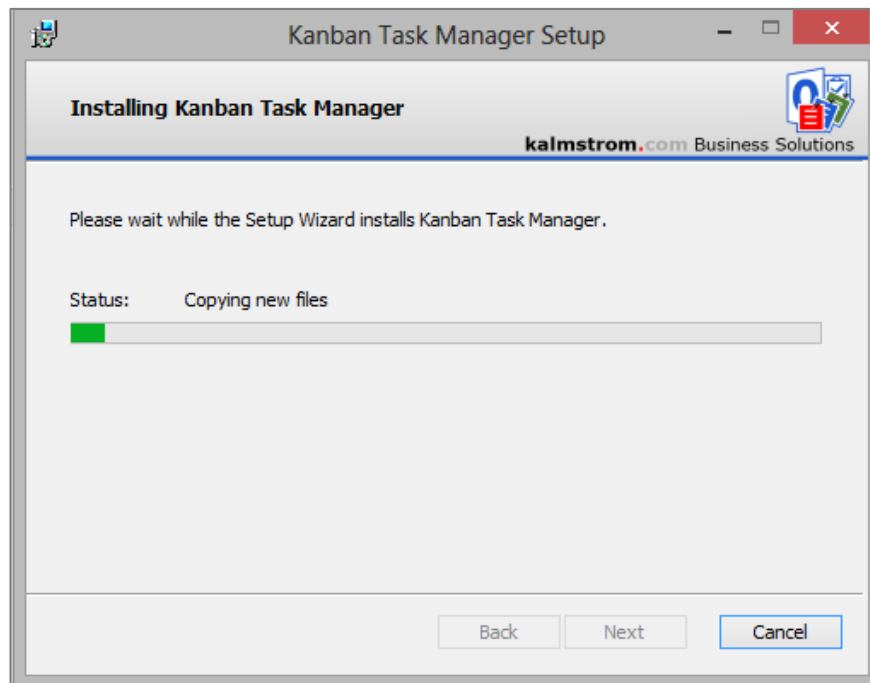
4. Confirm installation



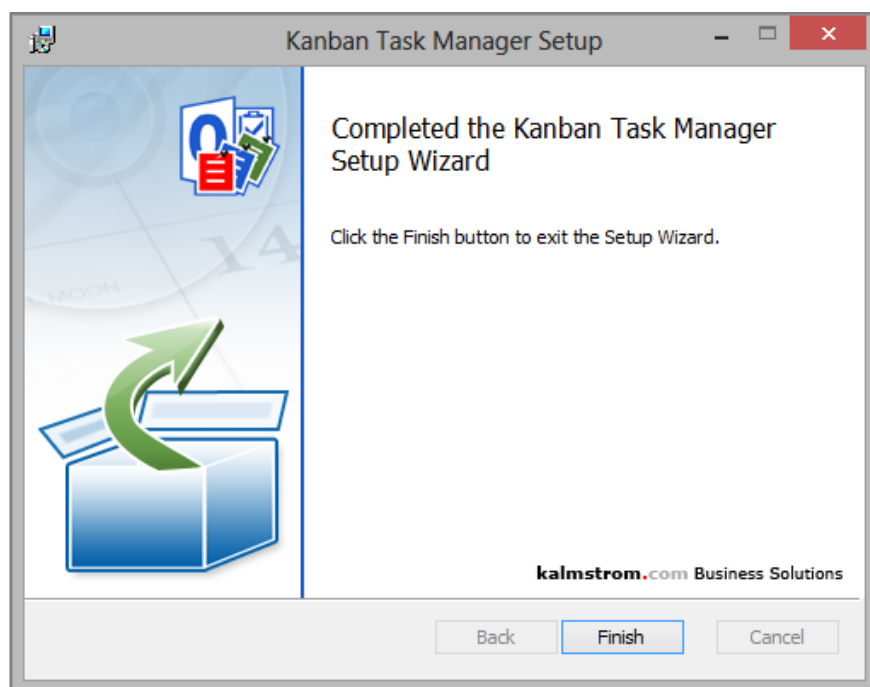
5. Allow the installation if the file is digitally signed by Kalmstrom Enterprises AB, the company behind the brand kalmstrom.com Business Solutions.



6. The actual installation

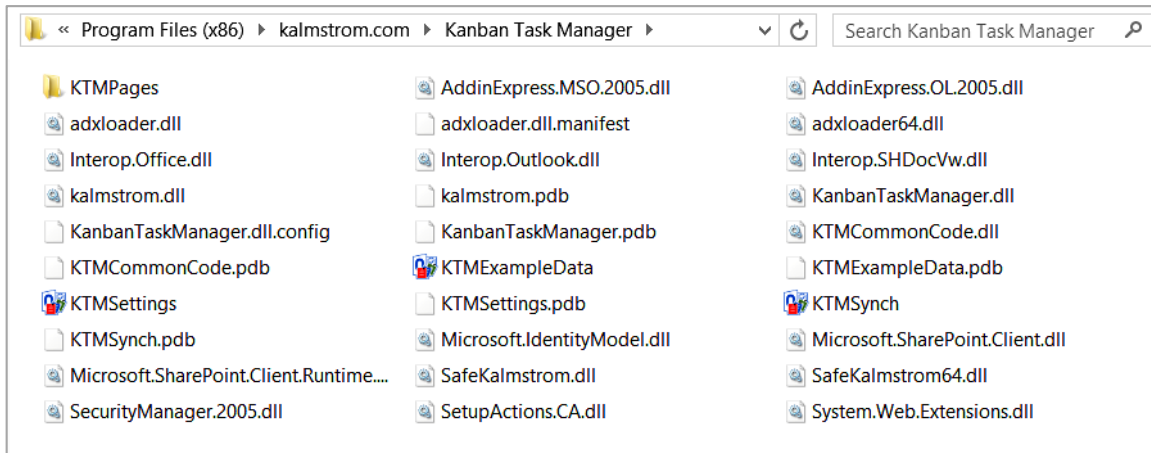


7. When the installation is finished you will get a message that it has succeeded.

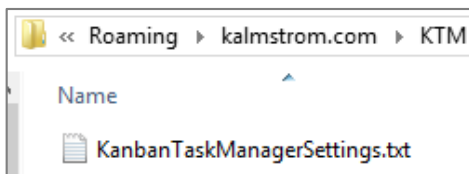


2.3 FILES

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

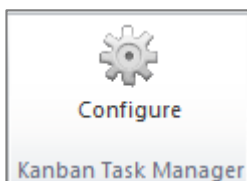


After the configuration is finished, there will also be a settings file called **KanbanTaskManagerSettings.txt** file under C:\Users\[UserName]\AppData\Roaming\kalmstrom.com\KTM\.



There will also be an Excel report in Document/My KTM folder called **KanbanTaskManagerReports.xlsx** file. It will be created the first time you run the reports and then updated each time you run them.

2.4 THE FIRST OUTLOOK BUTTON

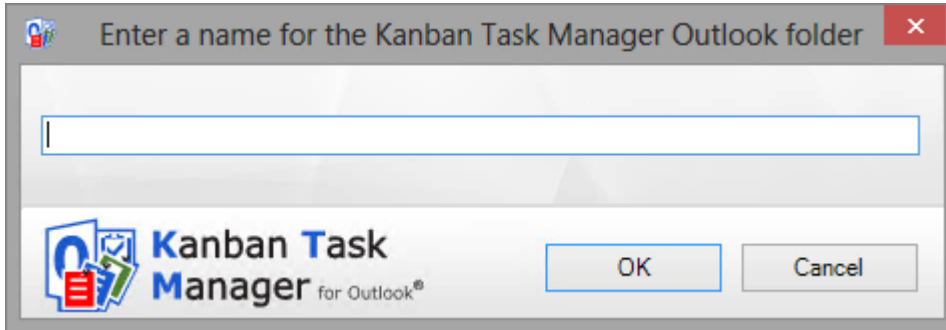


When you open Outlook again after the installation, you will see a new *Kanban Task Manager* Configure button in the Outlook ribbon. Press it to configure *Kanban Task Manager*.

2.5 THE OUTLOOK FOLDER

When you press the *Kanban Task Manager* Configure button for the first time you will be asked to give a name to the *Kanban Task Manager* folder. When you have entered the name and clicked OK, the folder will be created under your Outlook tasks.

This is a personal folder, so each user who installs *Kanban Task Manager* can give the name he or she prefers.



3 SHARING OPTIONS

When the Outlook folder has been created, you are asked how to share and store the task data and the *Kanban Task Manager* settings.

Kanban Task Manager supports three alternatives for sharing and storing, and each has its benefits. If you select the SharePoint or SQL Server option, you need to have your own SharePoint site or SQL Server, in-house or hosted. If you select the Access database, *Kanban Task Manager* can create the database for you, but you need a shared network folder to place it in.

If the Access or SQL Server alternative is selected, there will be an option to "Create new" or "Use existing".

For the SharePoint option *Kanban Task Manager* can judge if there are already existing lists for the application. In that case they will be used. If there are no *Kanban Task Manager* lists on the site, new lists will be created.

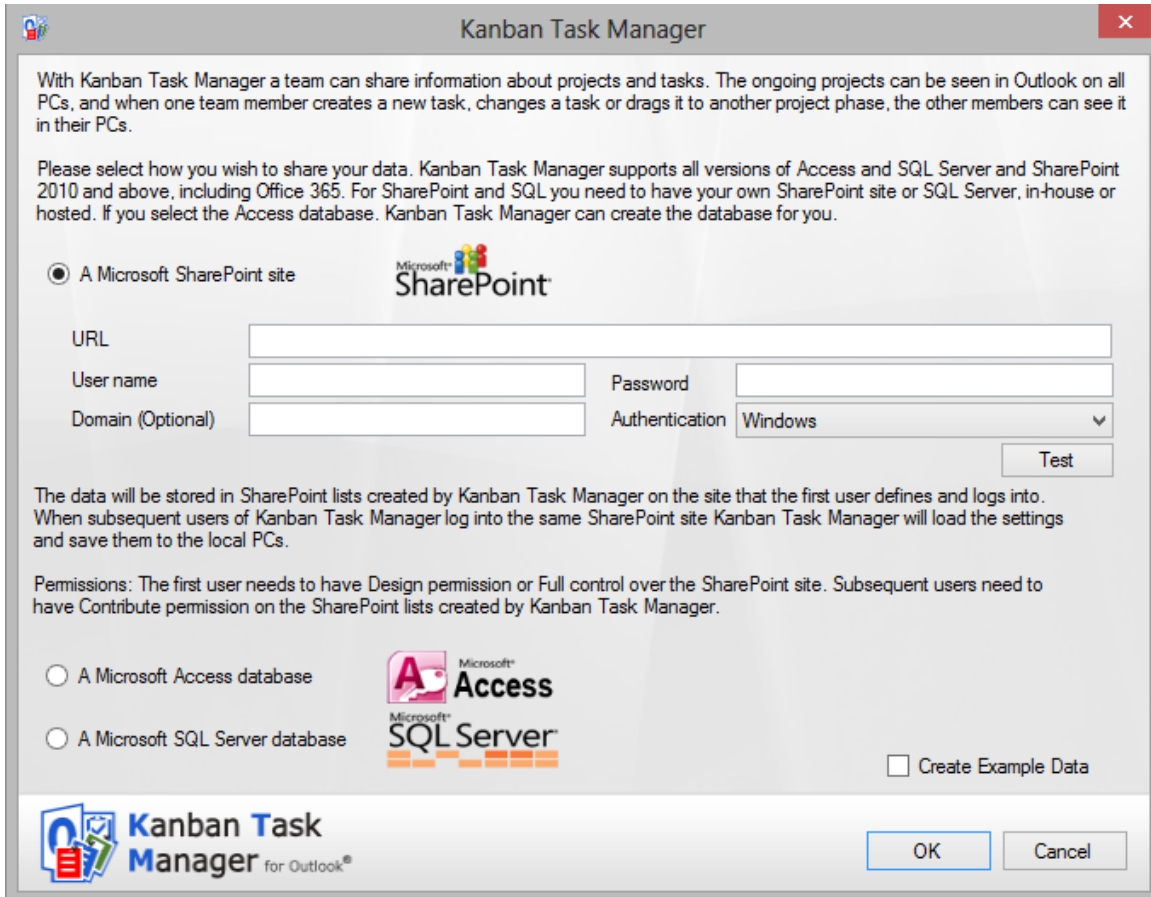
3.1 TABLES/LISTS

The *Kanban Task Manager* installer creates six database tables or SharePoint lists: Lanes, Phases, Projects, Responsibles, Settings and Tasks. When the custom field option is used, a seventh table or list will be created.

3.2 A SHAREPOINT SITE

With the SharePoint option the shared information will be stored in SharePoint lists created by *Kanban Task Manager* on the site that the admin/first user defines and logs into.

When subsequent users of *Kanban Task Manager* log into the same SharePoint site, *Kanban Task Manager* will load the settings and save them in the local PCs.



Kanban Task Manager

With Kanban Task Manager a team can share information about projects and tasks. The ongoing projects can be seen in Outlook on all PCs, and when one team member creates a new task, changes a task or drags it to another project phase, the other members can see it in their PCs.

Please select how you wish to share your data. Kanban Task Manager supports all versions of Access and SQL Server and SharePoint 2010 and above, including Office 365. For SharePoint and SQL you need to have your own SharePoint site or SQL Server, in-house or hosted. If you select the Access database, Kanban Task Manager can create the database for you.

☒ A Microsoft SharePoint site



URL

User name Password

Domain (Optional) Authentication

The data will be stored in SharePoint lists created by Kanban Task Manager on the site that the first user defines and logs into. When subsequent users of Kanban Task Manager log into the same SharePoint site Kanban Task Manager will load the settings and save them to the local PCs.

Permissions: The first user needs to have Design permission or Full control over the SharePoint site. Subsequent users need to have Contribute permission on the SharePoint lists created by Kanban Task Manager.

☐ A Microsoft Access database



☐ A Microsoft SQL Server database



☐ Create Example Data

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3.2.1 PERMISSIONS

The admin/first user needs to have Design permission or Full control over the SharePoint site. Subsequent users need to have contribute permission on the SharePoint lists created by *Kanban Task Manager*.

3.2.2 TIME

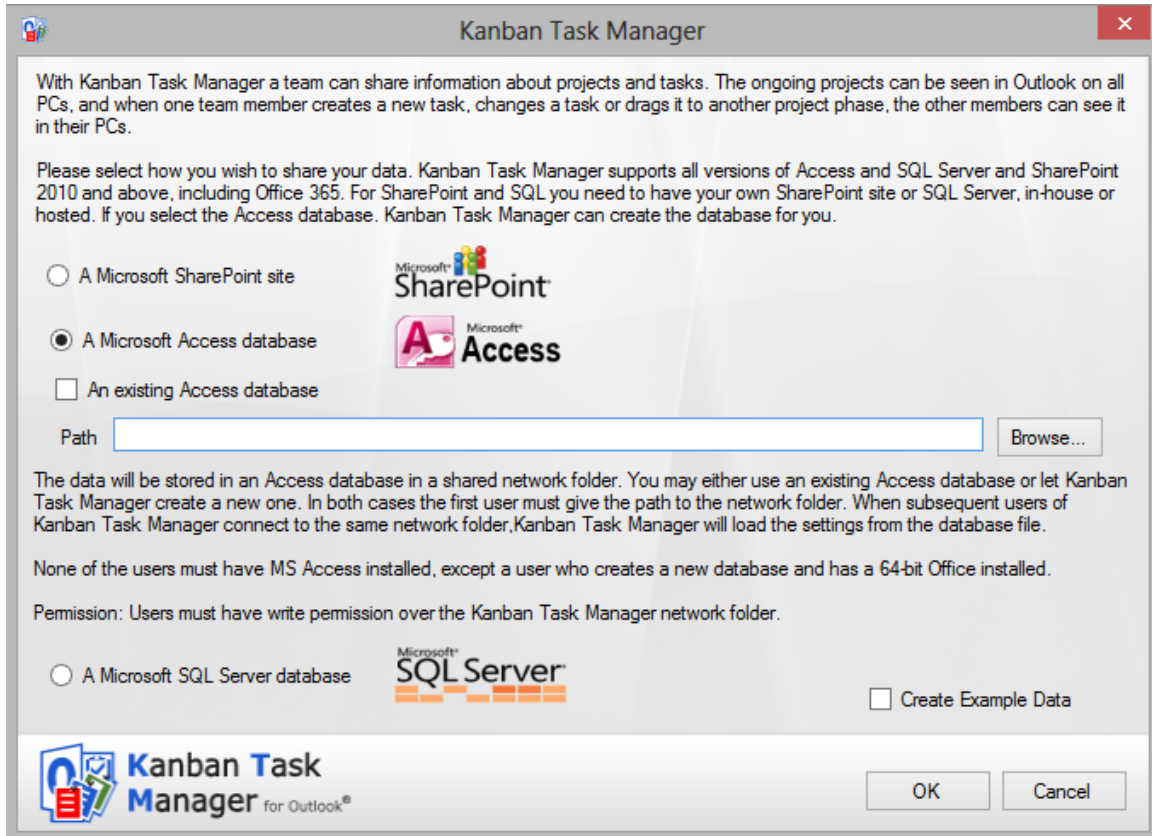
For the synchronization to work each PC must have the correct local time and date.

3.3 AN ACCESS DATABASE

With the Access alternative the shared information will be stored in an Access database in a shared network folder. When you select this option, you may either use an existing Access database or let *Kanban Task Manager* create a new one for you. In both cases the admin/first user must give the path to the network folder, by pasting it or browsing to it.

Subsequent users of *Kanban Task Manager* will have to use the Existing database option and give the path to the same network folder, *Kanban Task Manager* will then load the settings from the database file.

None of the users need to have MS Access installed, because the ability to read and write Access databases is included in Office. However, if the admin/first user who creates the new database has a 64-bit Office, he needs to have Access installed.



Kanban Task Manager

With Kanban Task Manager a team can share information about projects and tasks. The ongoing projects can be seen in Outlook on all PCs, and when one team member creates a new task, changes a task or drags it to another project phase, the other members can see it in their PCs.

Please select how you wish to share your data. Kanban Task Manager supports all versions of Access and SQL Server and SharePoint 2010 and above, including Office 365. For SharePoint and SQL you need to have your own SharePoint site or SQL Server, in-house or hosted. If you select the Access database, Kanban Task Manager can create the database for you.

☐ A Microsoft SharePoint site

☒ A Microsoft Access database

☐ An existing Access database

Path

The data will be stored in an Access database in a shared network folder. You may either use an existing Access database or let Kanban Task Manager create a new one. In both cases the first user must give the path to the network folder. When subsequent users of Kanban Task Manager connect to the same network folder, Kanban Task Manager will load the settings from the database file.

None of the users must have MS Access installed, except a user who creates a new database and has a 64-bit Office installed.

Permission: Users must have write permission over the Kanban Task Manager network folder.

☐ A Microsoft SQL Server database

☐ Create Example Data

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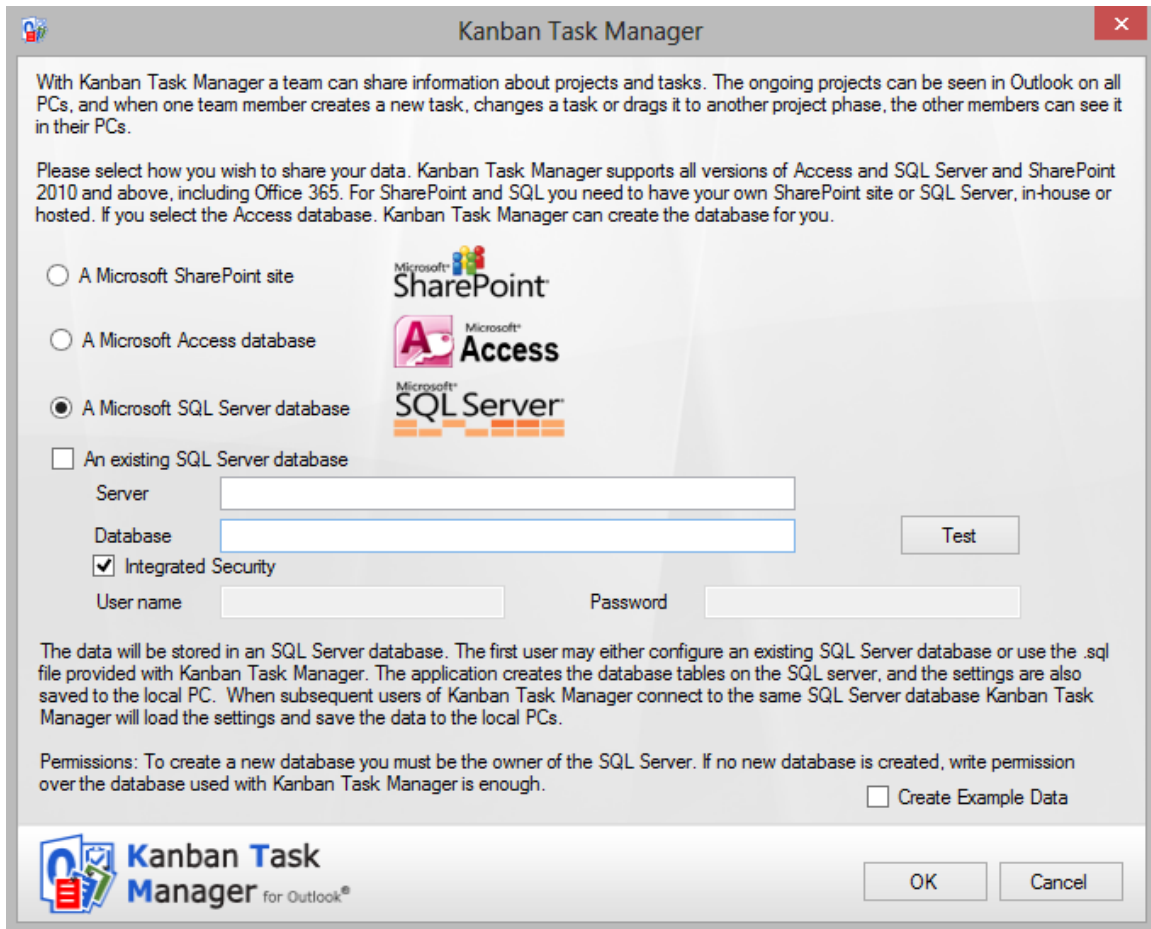
3.3.1 PERMISSIONS

All users must have write permission over the network folder where the Access database is placed.

3.4 AN SQL SERVER DATABASE

With the SQL Server option the shared information will be stored in an SQL Server database. The admin/first user may either configure an existing SQL Server database or use the .sql file provided with *Kanban Task Manager*. The application creates the database tables on the SQL server, and the settings are also saved in the local PC.

When subsequent users of *Kanban Task Manager* connect to the same SQL Server database *Kanban Task Manager* will load the settings and save the info to the local PCs.



The screenshot shows the 'Kanban Task Manager' installation window. It contains a title bar with a close button. The main area has a text box explaining the software's purpose: 'With Kanban Task Manager a team can share information about projects and tasks. The ongoing projects can be seen in Outlook on all PCs, and when one team member creates a new task, changes a task or drags it to another project phase, the other members can see it in their PCs.' Below this, another text box asks the user to select how to share data, mentioning support for Access, SQL Server, and SharePoint 2010 and above. There are four radio button options: 'A Microsoft SharePoint site', 'A Microsoft Access database', 'A Microsoft SQL Server database' (which is selected), and 'An existing SQL Server database'. To the right of these options are logos for SharePoint, Access, and SQL Server. Below the radio buttons, there are input fields for 'Server' and 'Database' under the 'An existing SQL Server database' option, a 'Test' button, a checked 'Integrated Security' checkbox, and input fields for 'User name' and 'Password'. At the bottom, there is a paragraph about data storage and permissions, a 'Create Example Data' checkbox, and 'OK' and 'Cancel' buttons. The Kanban Task Manager logo is in the bottom left corner.

Kanban Task Manager

With Kanban Task Manager a team can share information about projects and tasks. The ongoing projects can be seen in Outlook on all PCs, and when one team member creates a new task, changes a task or drags it to another project phase, the other members can see it in their PCs.

Please select how you wish to share your data. Kanban Task Manager supports all versions of Access and SQL Server and SharePoint 2010 and above, including Office 365. For SharePoint and SQL you need to have your own SharePoint site or SQL Server, in-house or hosted. If you select the Access database, Kanban Task Manager can create the database for you.

☐ A Microsoft SharePoint site

☐ A Microsoft Access database

☒ A Microsoft SQL Server database

☐ An existing SQL Server database

Server

Database

☒ Integrated Security

User name Password

The data will be stored in an SQL Server database. The first user may either configure an existing SQL Server database or use the .sql file provided with Kanban Task Manager. The application creates the database tables on the SQL server, and the settings are also saved to the local PC. When subsequent users of Kanban Task Manager connect to the same SQL Server database Kanban Task Manager will load the settings and save the data to the local PCs.

Permissions: To create a new database you must be the owner of the SQL Server. If no new database is created, write permission over the database used with Kanban Task Manager is enough.

☐ Create Example Data

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3.4.1 PERMISSIONS

The admin/first user must be owner of the SQL Server database. Subsequent users need to have write permission.

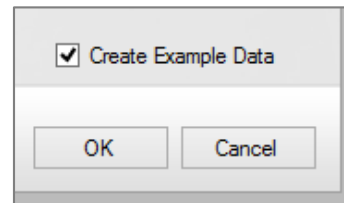
3.5 SWITCH TO ANOTHER SHARING OPTION

If you want to switch to another option, delete the file KanbanTaskManagerSettings.txt in the folder at C:\Users\[UserName]\AppData\Roaming\kalmstrom.com\KTM

Then you will get the Sharing options dialog again the first time you click on the *Kanban Task Manager* Configure button in Outlook. Note that the tasks from the old database will not be visible in *Kanban Task Manager* unless you transfer them to the new database.

3.6 EXAMPLE DATA

The example data is intended for users who don't want to bother with creating or adding their own projects, responsables, phases and tasks for the evaluation of *Kanban Task Manager*. The example data quickly gives you a set of tasks to test the various *Kanban Task Manager* features with.



3.7 CREATE EXAMPLE DATA

Check the box for Example data in the Sharing options screen if you want to create example data. A new dialog will open, where you can choose how many tasks you want to create. Click OK when you want the data to be created.

Kanban Task Manager Example data

Responsibles
James Bond, Hulk Hogan, John Smith, Wolfgang Mozart, Charles Darwin, Edward Confessor, Ronald MacDonald, Julius Caesar, Richard Lionheart, Easter Bunny

Projects
Planting the garden, Building a playground, Trip to India, School reunion, Sales team meeting, Team meeting, Composing instructions manual, Insurance for cars, Staff training day, Health and safety program

Phases
New, In Progress, Waiting, Deferred, Finished

Lanes
Customer, Sales, Contracts, Legal, Fulfillment

Body
Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna.
Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy

Subjects
Invoice customer, Send receipts, Transcribe meeting notes, Order rooms, File the papers, Book time at the ministry, Send notices, Forward memos, Order invitations and distribute, Select samples before the meeting

Number of Tasks

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OK Cancel

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3.8 REMOVE EXAMPLE DATA

The best way to remove the Example data is to delete the *Kanban Task Manager* Outlook folder and database and create a new database and Outlook folder. In the SharePoint case, delete all items from the SharePoint list or delete the whole SharePoint list. Follow these steps:

1. Delete the *Kanban Task Manager* Outlook folder
2. Close Outlook
3. Delete the *Kanban Task Manager* database or SharePoint list

3.8.1 ADD YOUR OWN DATA

Follow these steps to start using *Kanban Task Manager* with your own data after removing the Example Data:

1. Open Outlook and press the *Kanban Task Manager* Configure button
2. Give a name to the new Outlook folder and click OK
3. (Now you might get a message about failed connection. In that case, click OK.)
4. Select sharing option. If a path to the Example data database/SharePoint list you have deleted is shown, remove that path and add a new path or browse to the desired location. Click OK.
5. As you have not created Example data this time, the settings dialog will be displayed. Write or paste your own projects, phases, responsables (and lanes) and define other settings.
6. Click OK to save the settings.
7. Restart Outlook

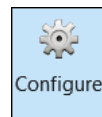
4 THE SETTINGS DIALOG

When you have selected the Sharing Option and clicked OK without checking the box for Example data, the Settings dialog will open. Here the first user/admin must enter the projects, phases, responsables and lanes to be used by the team. At least one project, phase and responsible must be added. Lanes must not be used. If you don't want to group the tasks on the kanban board, just leave the Lanes tab empty.

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

Subsequent users will see the settings defined by the first user/admin, and they just have to click OK to save the settings to their own PCs.

The Settings dialog may be opened anytime via the Configure button in Outlook. The settings are saved in the selected database or SharePoint site and in the kalmstrom.com folder under AppData on each local PC.



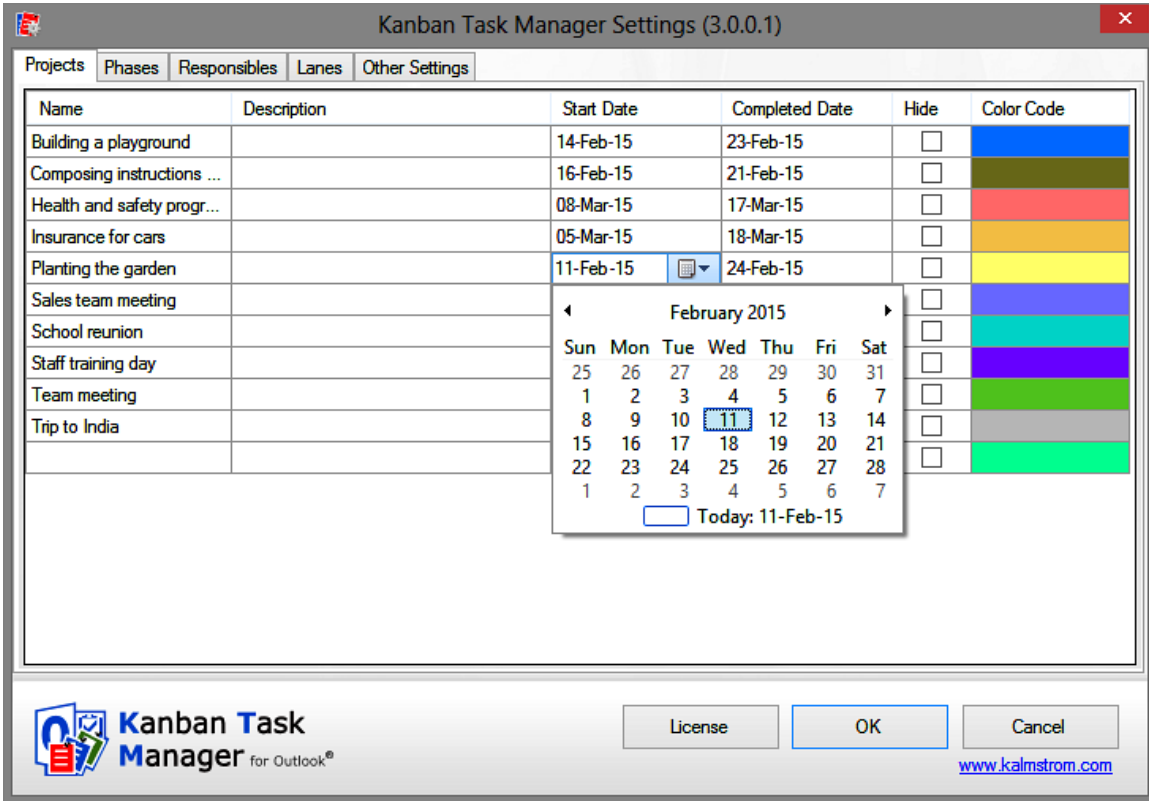
Details for projects, phases responsables and lanes may be copied from Excel or a database and pasted into the settings grid – and vice versa.

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

4.1 PROJECTS

Enter your workgroup's projects under the Projects tab, and they will show up in the task dropdown for project so that users can select the project that each task belongs to.

The project tab has a DateTimePicker for choosing Start date and Completed Date for each project.



Kanban Task Manager Settings (3.0.0.1)

Projects | Phases | Responsibles | Lanes | Other Settings

Name	Description	Start Date	Completed Date	Hide	Color Code
Building a playground		14-Feb-15	23-Feb-15	☐	Blue
Composing instructions ...		16-Feb-15	21-Feb-15	☐	Brown
Health and safety progr...		08-Mar-15	17-Mar-15	☐	Red
Insurance for cars		05-Mar-15	18-Mar-15	☐	Orange
Planting the garden		11-Feb-15	24-Feb-15	☐	Yellow
Sales team meeting				☐	Purple
School reunion				☐	Cyan
Staff training day				☐	Dark Purple
Team meeting				☐	Green
Trip to India				☐	Grey
				☐	Light Green

February 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

Today: 11-Feb-15

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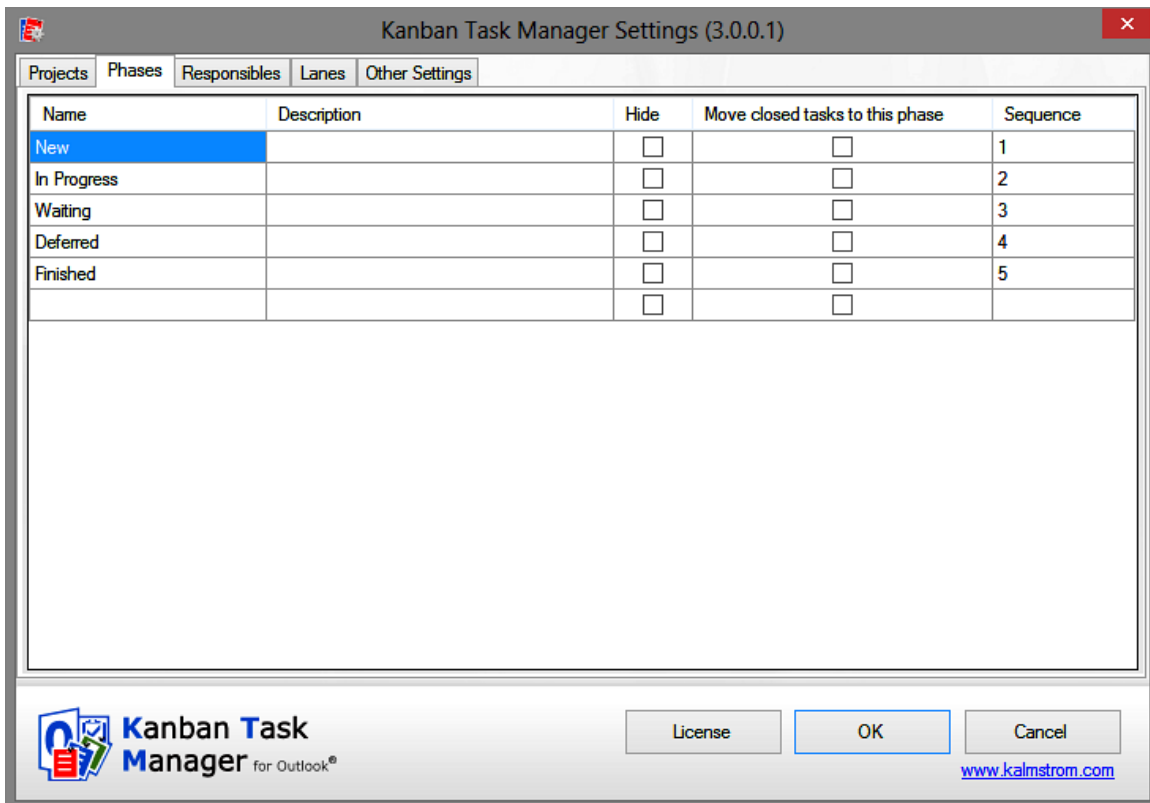
License OK Cancel

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4.2 PHASES

Kanban Task Manager has a common phase list which is shared by all projects. There is no limit to the number of phases you can add under the phases tab of the Configure dialog. Set the phase captions according to your team's requirements and order them as needed.

When you change the order of one phase, the order of the other phases will be changed accordingly.

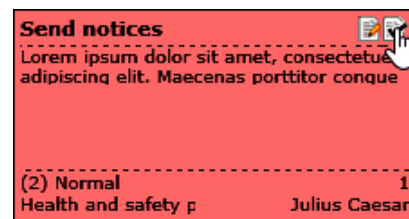


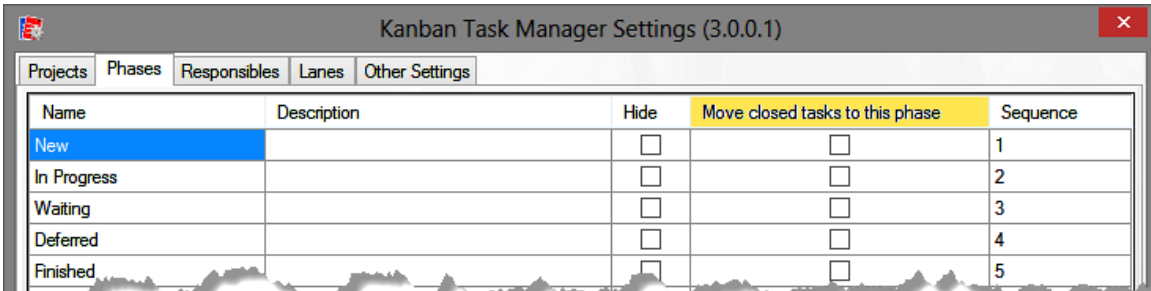
4.2.1 CLOSE A TASK

When users click on the Close button on the visualized task on the kanban board, the item will be either deleted or moved to a specified phase.

The administrator/first user decides which option should be used under the Phases tab in the *Kanban Task Manager* settings.

To move the tasks to a specified phase check, the option **"Move closed tasks to this phase"** in the phase to where the tasks should be moved.





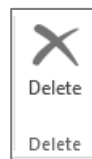
Kanban Task Manager Settings (3.0.0.1)

Projects Phases **Responsibles** Lanes Other Settings

Name	Description	Hide	Move closed tasks to this phase	Sequence
New		☐	☐	1
In Progress		☐	☐	2
Waiting		☐	☐	3
Deferred		☐	☐	4
Finished		☐	☐	5

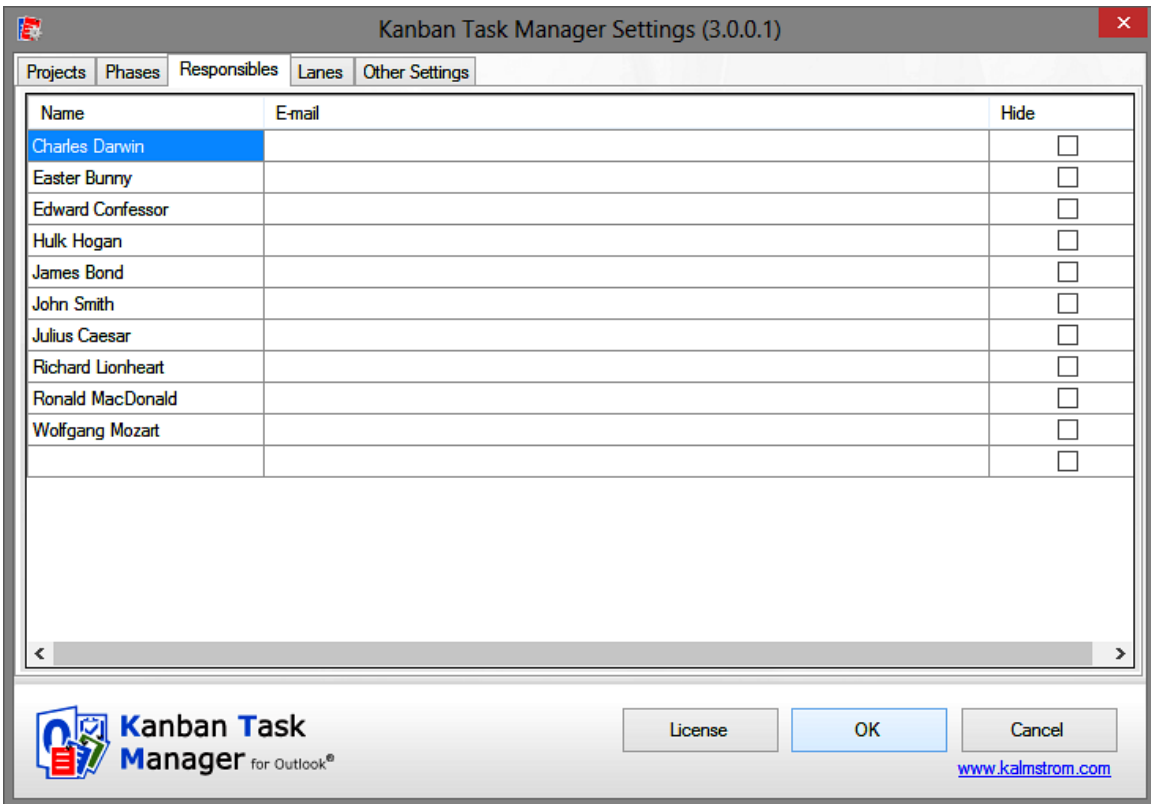
When no phase is checked for “Moved closed tasks to this phase”, the tasks will be deleted when the Close icon is pressed.

When the Close button is used to move tasks instead of deleting them, tasks can be deleted by using the standard delete button in the Outlook ribbon.



4.3 RESPONSIBLES

Write or paste the responsible persons here. They will show up in the task dropdown for responsible, so that you can select one responsible for each task you create.



Kanban Task Manager Settings (3.0.0.1)

Projects Phases **Responsibles** Lanes Other Settings

Name	E-mail	Hide
Charles Darwin		☐
Easter Bunny		☐
Edward Confessor		☐
Hulk Hogan		☐
James Bond		☐
John Smith		☐
Julius Caesar		☐
Richard Lionheart		☐
Ronald MacDonald		☐
Wolfgang Mozart		☐
		☐

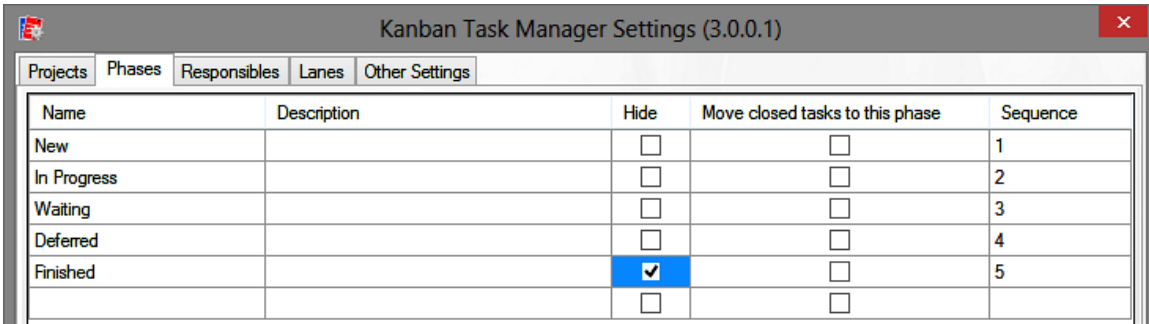
 **Kanban Task Manager** for Outlook®

License OK Cancel

www.kalmstrom.com

4.4 HIDE A PHASE, PROJECT OR RESPONSIBLE

By checking the **Hide** option for a phase, project or responsible list item you may hide that phase/project/responsible from the kanban board. This is suitable for phases like “Finished”, which you want to keep in the database but not show on the kanban board, and for finished projects and responsables that are no longer active in the work group.

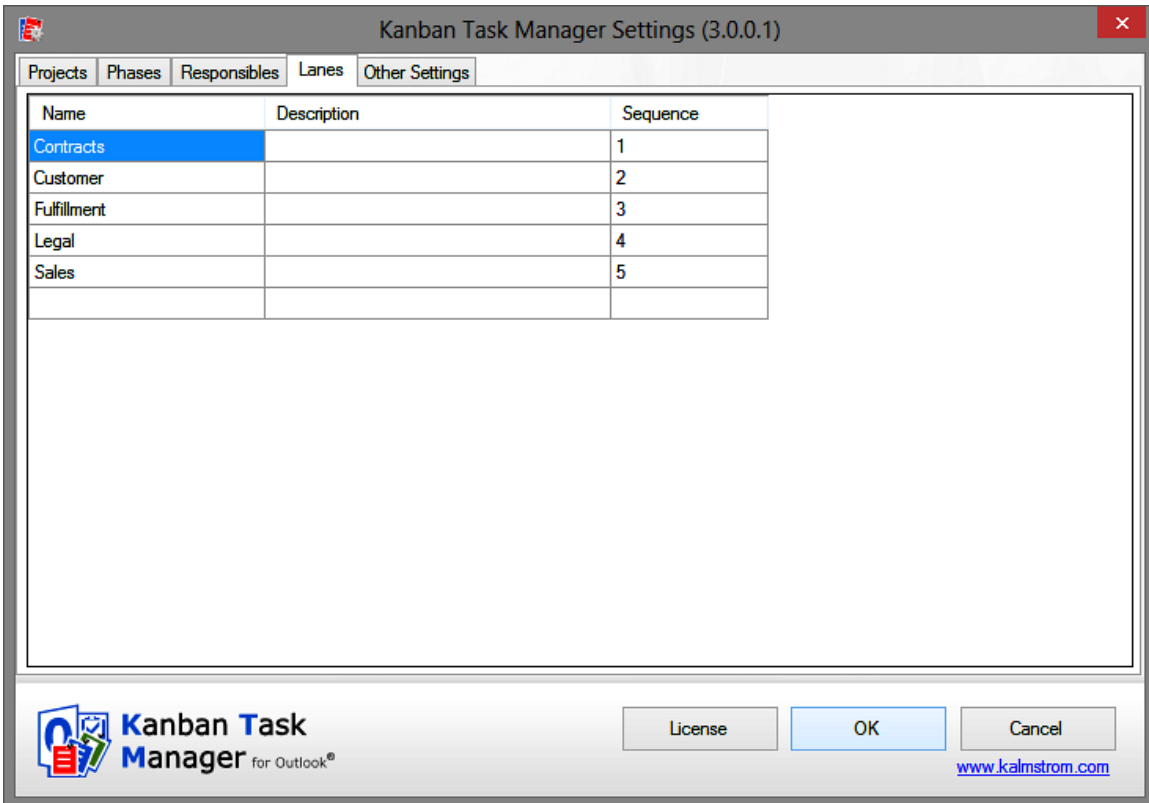


The screenshot shows the 'Phases' tab in the 'Kanban Task Manager Settings (3.0.0.1)' dialog. The table below lists the phases and their settings.

Name	Description	Hide	Move closed tasks to this phase	Sequence
New		☐	☐	1
In Progress		☐	☐	2
Waiting		☐	☐	3
Deferred		☐	☐	4
Finished		☒	☐	5
		☐	☐	

4.5 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 in this list. Add a sequence number to get them in the desired order.



The screenshot shows the 'Lanes' tab in the 'Kanban Task Manager Settings (3.0.0.1)' dialog. The table below lists the lanes and their settings.

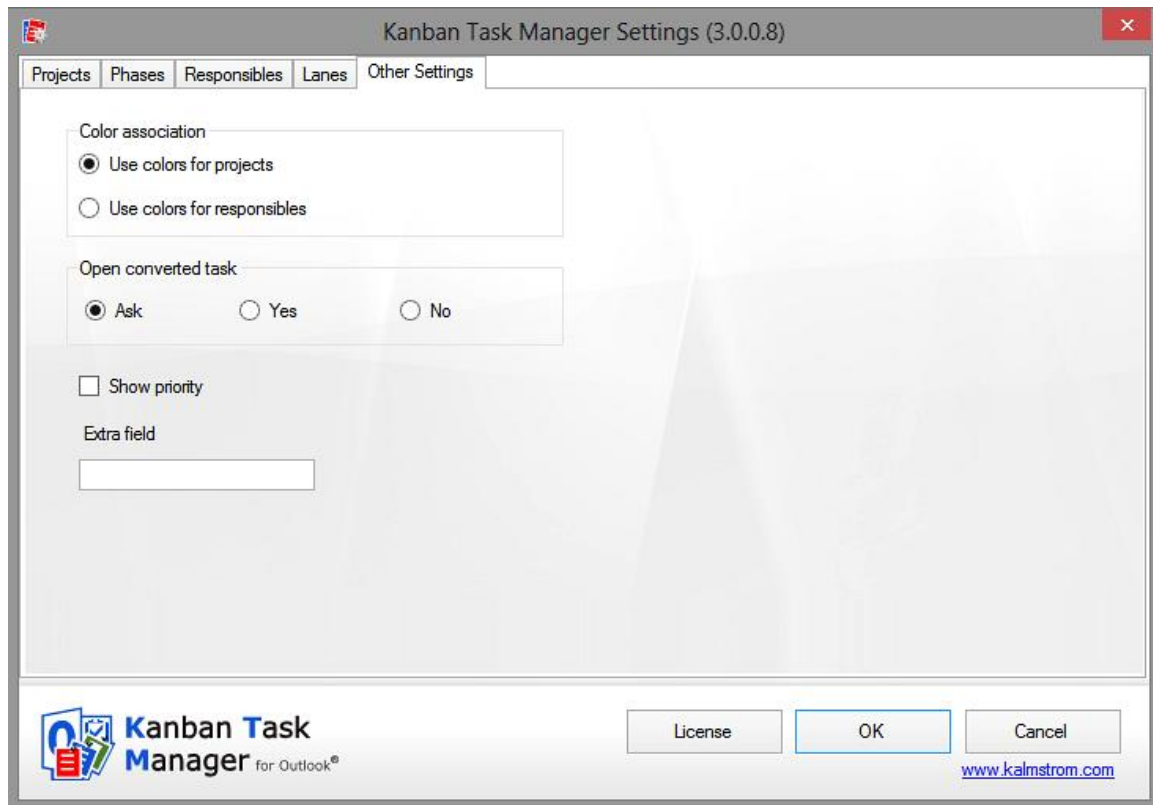
Name	Description	Sequence
Contracts		1
Customer		2
Fulfillment		3
Legal		4
Sales		5

At the bottom of the dialog, there are buttons for 'License', 'OK', and 'Cancel', along with the 'Kanban Task Manager for Outlook' logo and the website www.kalmstrom.com.

4.6 OTHER SETTINGS

Under the Other settings tab, you can decide if color codes should be associated with projects or responsables and what Outlook should do with tasks converted from e-mails.

Here you can also define if you want the priority value to be shown on the visualized tasks, and you can create a custom field.

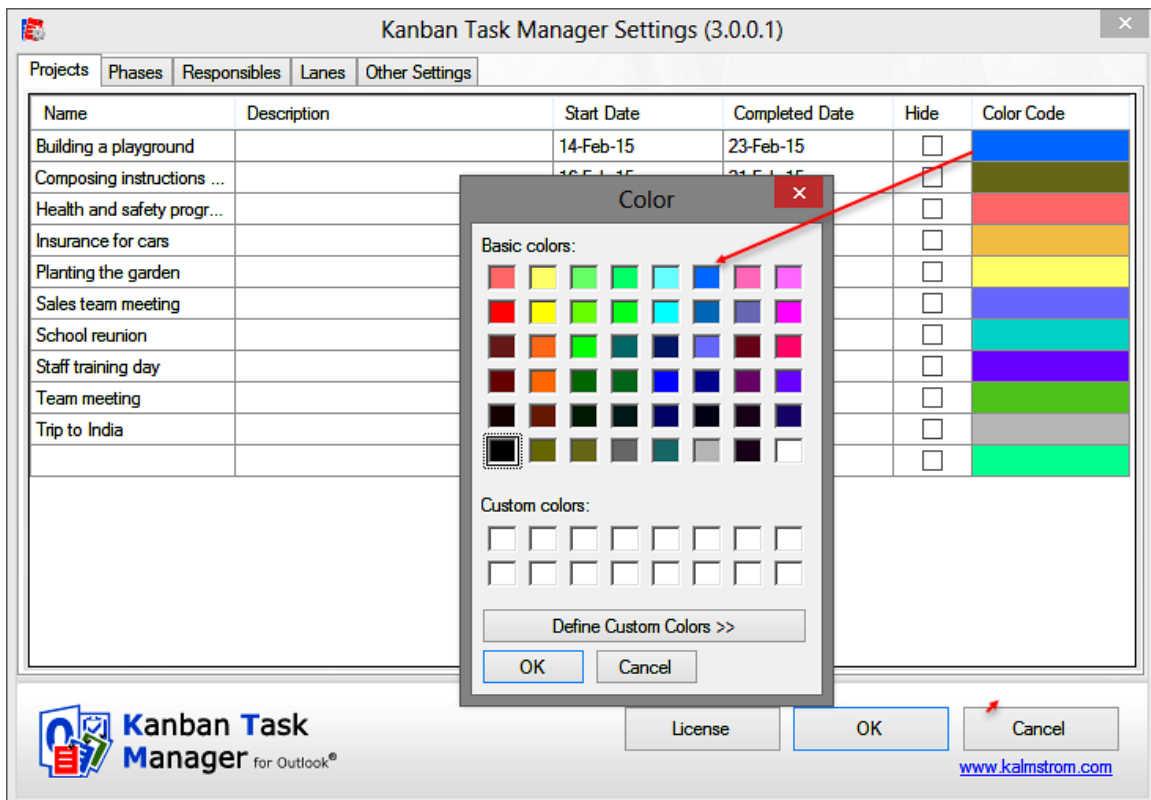


4.6.1 COLORS

The tasks in *the Kanban Task Manager homepage* are colored after either project or responsible. Both the project and the responsible tabs have a checkbox for color. Check the one that suits you best, and each project or responsible will have their own color.

You can change the default color to another color in the RGB range if you wish. Click the color you wish to replace, and a color picker will be shown. The new color you select will be added when you click OK.

In the screenshot below colors are used for projects, which is default.



4.6.2 TASKS CONVERTED FROM E-MAILS

Under the Other Settings tab 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 the users can tell *Kanban Task Manager* to remember their 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.

If you decide that converted tasks should not be opened, you might want to give the first phase a name that suggests that it can contain tasks that are not tagged, like "Not Assigned" or "Converted from E-mail".

4.6.3 SHOW PRIORITY

Check the box for **"Show priority"** if you want the priority value to be shown on the kanban cards.

☒ Show priority

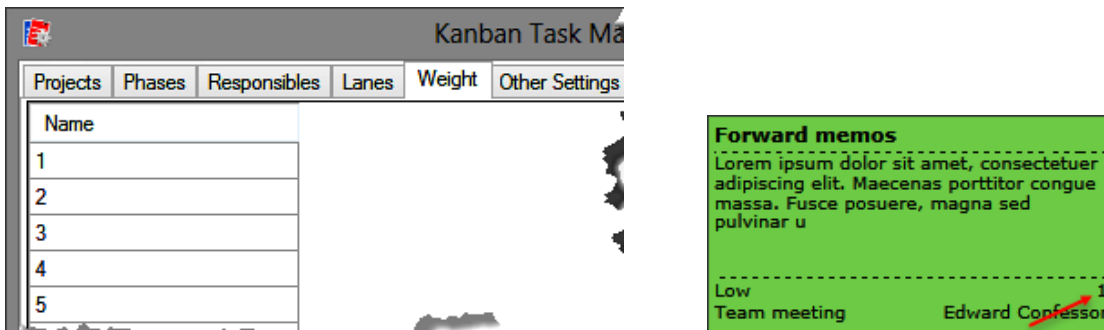
4.6.4 EXTRA FIELD

In the **Extra field** you can enter any parameter that you would like to be added to the visualized tasks and that you want to filter the tasks by on the kanban board.

Extra field

When you enter a name in this field, a new tab will be added to the *Kanban Task Manager* settings. Add your own values in the list, so that users can select them for each task.

The extra field value will be added above the responsible value on the visualized task. In the images below, the organization has opted to use the parameter “Weight” and to set the values to 1–5. (They have also opted to show Priority in the task.)



Above the tasks on the kanban board there will also be a new dropdown for filtering the custom field.

Project All ▼
 Responsible All ▼
 Weight All ▼
 Priority All ▼

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).

Should you want to remove the custom parameter, just remove the text in the field.

5 THE KANBAN TASK MANAGER OUTLOOK BUTTONS

When the installation and configuration has been finished, you will have more *Kanban Task Manager* buttons in the Outlook ribbon.

5.1 BUTTONS IN THE OUTLOOK MAILBOX VIEW

When you have created your first projects, phases and Resposables and clicked OK to save the settings, three more buttons will be displayed in the *Kanban Task Manager* ribbon group in Outlook.

Now you will have a shortcut to the *Kanban Task Manager* Outlook folder under Tasks, the Configure button and a Statistics button that takes you to the Excel reports, refer to Statistics.

There is also a Convert button, so that you can convert e-mails into *Kanban Task Manager* tasks, refer to Convert E-mails into Tasks.



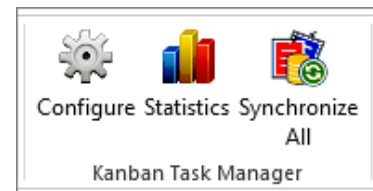
5.2 BUTTONS IN THE KANBAN TASK MANAGER VIEW

When you open the *Kanban Task Manager* folder the Configure and Statistics buttons are still visible in the *Kanban Task Manager* ribbon group, but instead of the shortcut you have a button for manual Zoom Bar

The kanban board may be zoomed in and out with the **zoom bar** to the right of the search field. Drag the bar to the left when you want to see as many tasks as possible. Drag the bar to the right when you want to zoom into one or a few tasks.

You can also 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. This method gives an even more expanded zoom range than the button.

Synchronization of all tasks.



6 USING KANBAN TASK MANAGER

Kanban Task Manager works in an Outlook task folder. When you open that folder you can see the workgroup's different tasks visualized on a kanban board, and you can edit and move the tasks here and also create new tasks.

6.1 TASKS

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.

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 are saved back to the database or SharePoint site *Kanban Task Manager* uses for sharing.

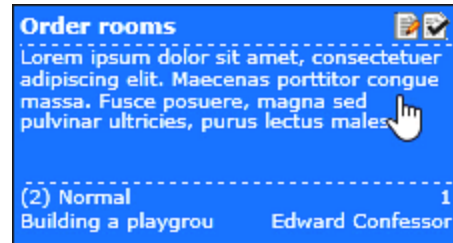
6.2 MOVE TASKS

To move a task, move the cursor over it. The cursor will then transform into a hand, and you can drag the task and drop it in the new place.

You can also move tasks between or within phases and within lanes by using the **CTRL** key + one of the **arrow** keys.

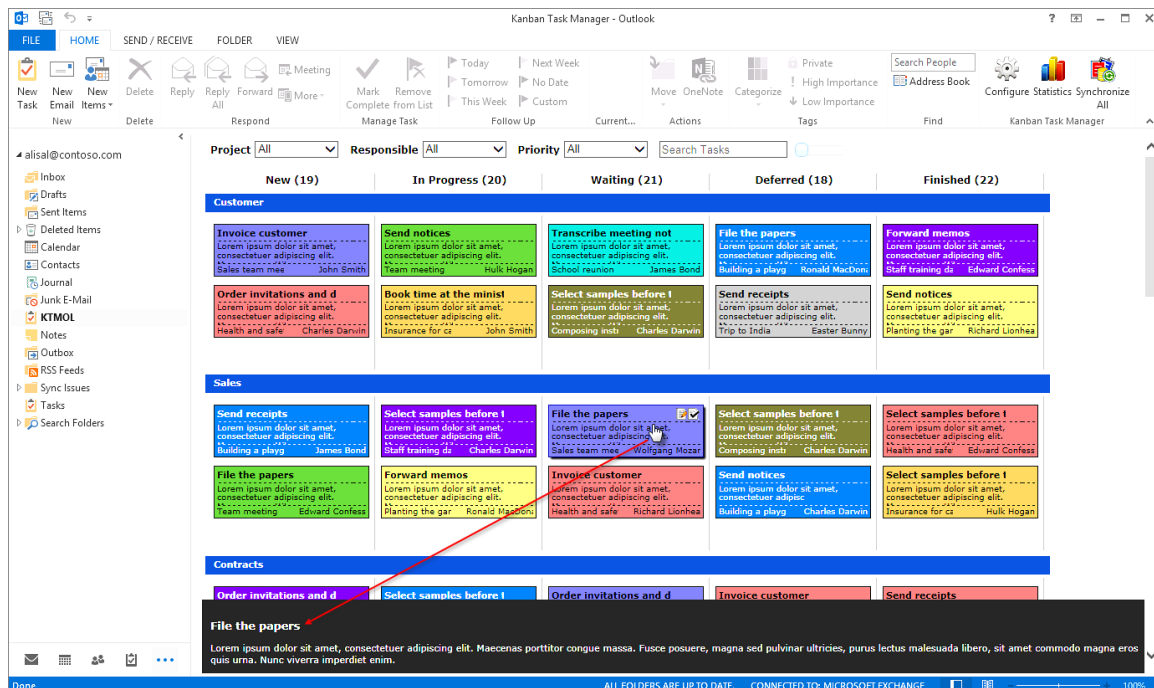
If you have a touch screen, you can move the tasks within and between phases and lanes with a **finger**.

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



6.3 SEE MORE TEXT

When you right click a task, a details pane that shows more of the text than what is visible on the kanban board will be shown at the bottom of the screen.

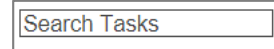


When you have already opened the details pane by right clicking on a task, you can select another task by either left or right click to see its details in the pane. You can also use the arrow keys to move between tasks.

Right click in an empty space to close the details pane.

6.4 SEARCH

Above the phases in the *Kanban Task Manager* homepage, to the right of the filter dropdowns, there is a search field, where you can search the subjects and bodies of all tasks.



Write or paste the word or phrase you are looking for. *Kanban Task Manager* will start searching instantly, and all tasks that contain that letter combination will show up on the kanban board.

The rest of the tasks will be hidden and an X icon will be displayed in the Search field. When you press the X, all the earlier tasks will come back again.

6.5 ZOOM BAR

The kanban board may be zoomed in and out with the **zoom bar** to the right of the search field. Drag the bar to the left when you want to see as many tasks as possible. Drag the bar to the right when you want to zoom into one or a few tasks.

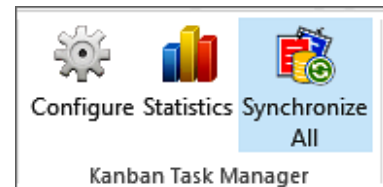


You can also use the Ctrl key + the plus or minus key to zoom in and out on the kanban board, just like you do with web pages. This method gives an even more expanded zoom range than the button.

6.6 SYNCHRONIZATION

Changed data is synchronized in the background every five minutes, but if you need to synchronize more often, press the button in the task view toolbar.

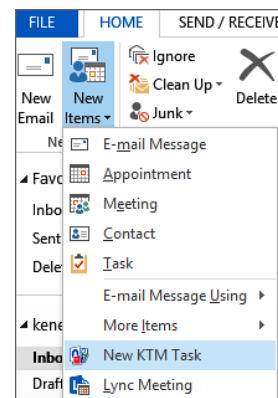
In the automatic synchronization only the changed tasks are updated. That way you will hardly notice the update. When you press the Synchronization button *Kanban Task Manager* updates all tasks, so it might take a bit longer.



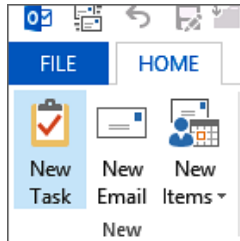
6.7 CREATE NEW TASK

Kanban Task Manager tasks can be created in three ways:

- When you are in the Outlook E-mail View or another View that is **not** the Outlook Task View, click the New item button and select "New KTM Task".

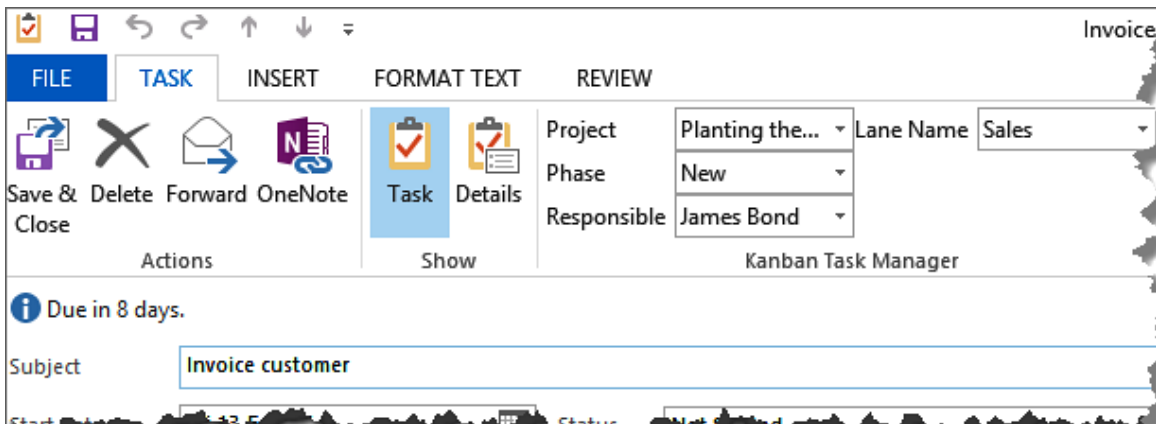


- When you are in the Outlook Task View you can:
 - Click on the New Task button in the Task View



- Doubleclick 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.

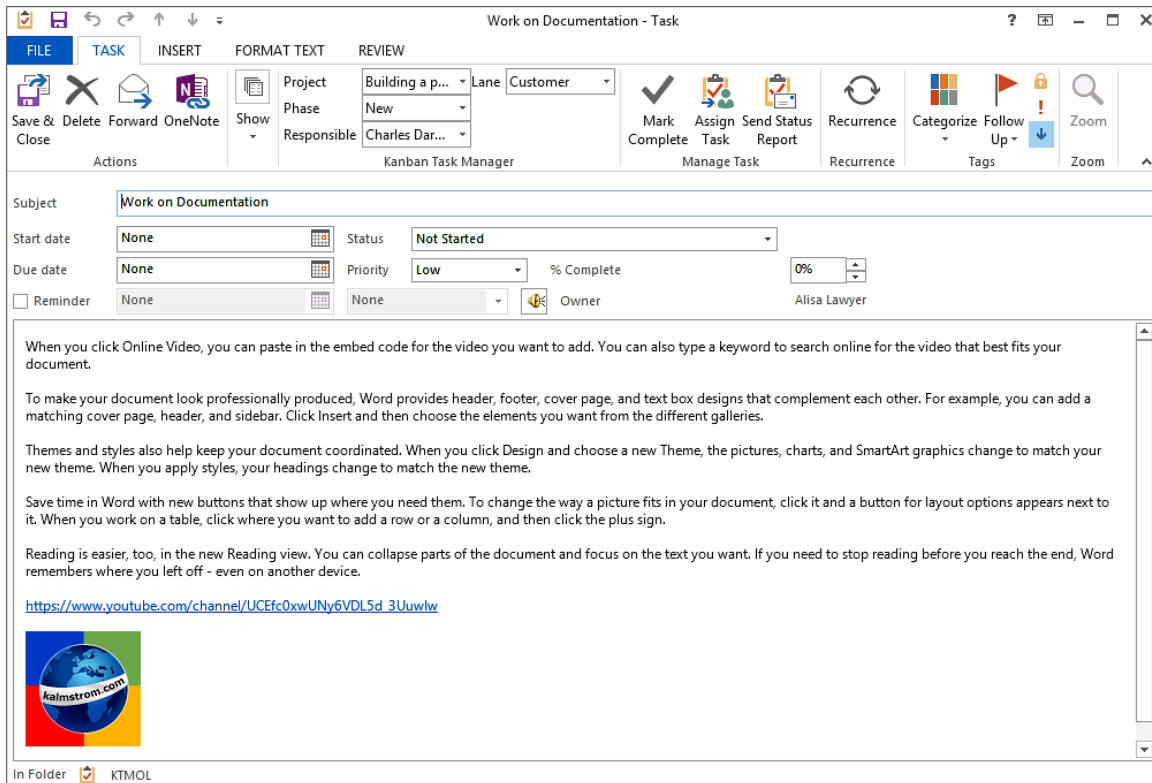
Kanban Task Manager uses standard Outlook task items, but the tasks have four or five dropdowns that are not there in other tasks. The default dropdowns are four, but if you use a custom field you will have five dropdowns.



Enter or select the normal task info but also select project, phase and responsible (and lane) for the task before you Save and Close. There might also be a fifth dropdown with values for a parameter that is unique for your organization.

6.7.1 INLINE IMAGES AND HTML FORMATTING

The task body support inline images and bold and italic text. The formatting and images are shown when you open the task. The kanban cards only show links and plain text.



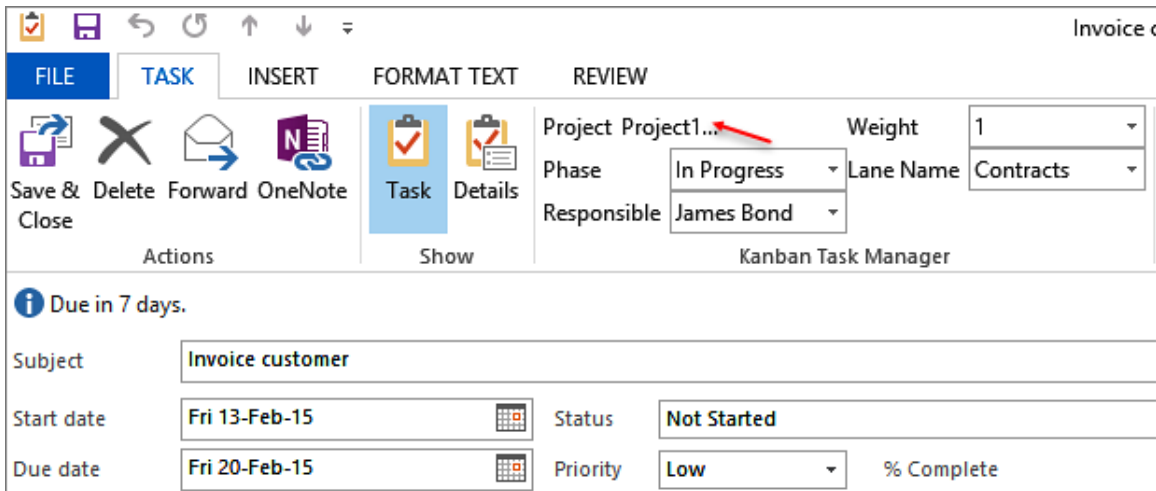
6.7.2 DEFAULT VALUES

When the task is created by clicking in a phase, that phase (and lane, if used) is selected as default in the dropdown. If project and/or responsible is filtered these values are also shown as default.

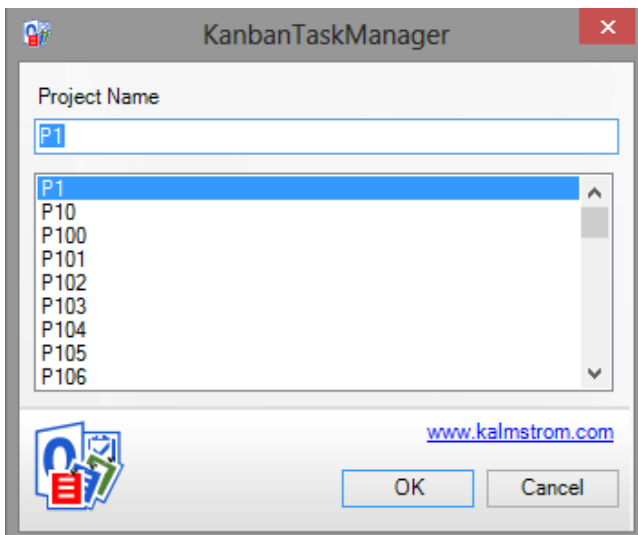
6.7.3 MORE THAN 100 VALUES

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, projects or responsables when the number of alternatives is more than 100.

In the image below the Project 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 project name, and it will be completed automatically. Then click OK to select that project.

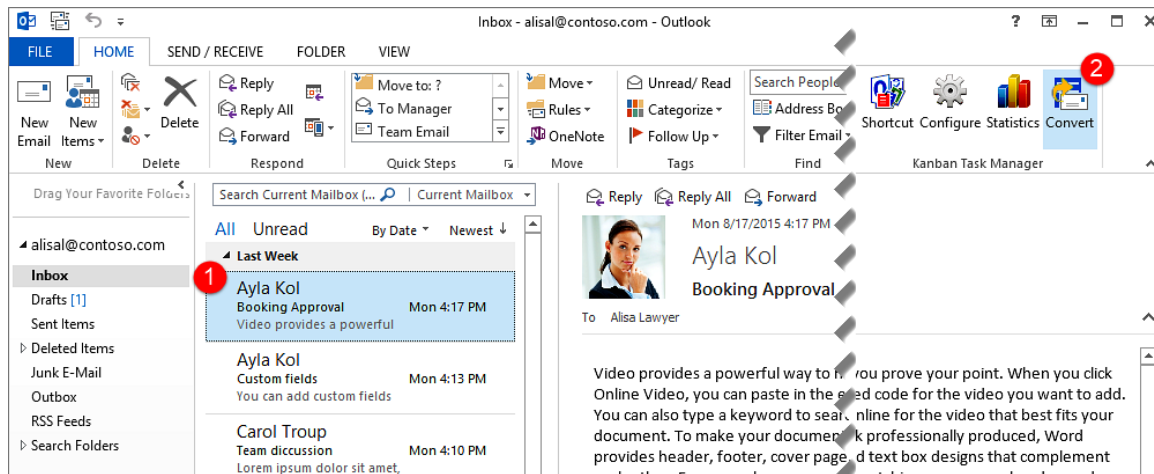


6.8 CONVERT E-MAILS INTO TASKS

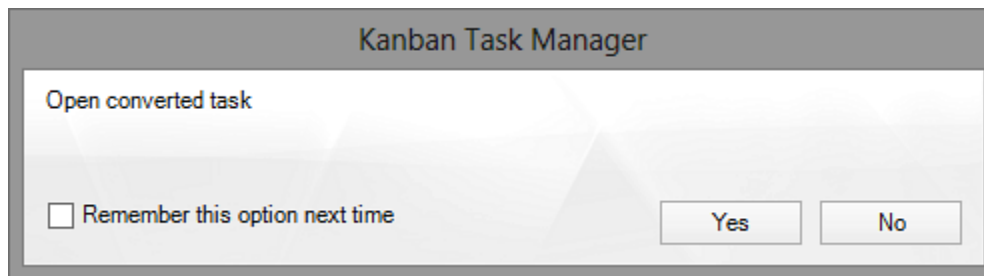
In the Outlook mail view, you will see a Convert button that converts e-mails into tasks.

To convert an e-mail into a task, select the email and click on the Convert button.

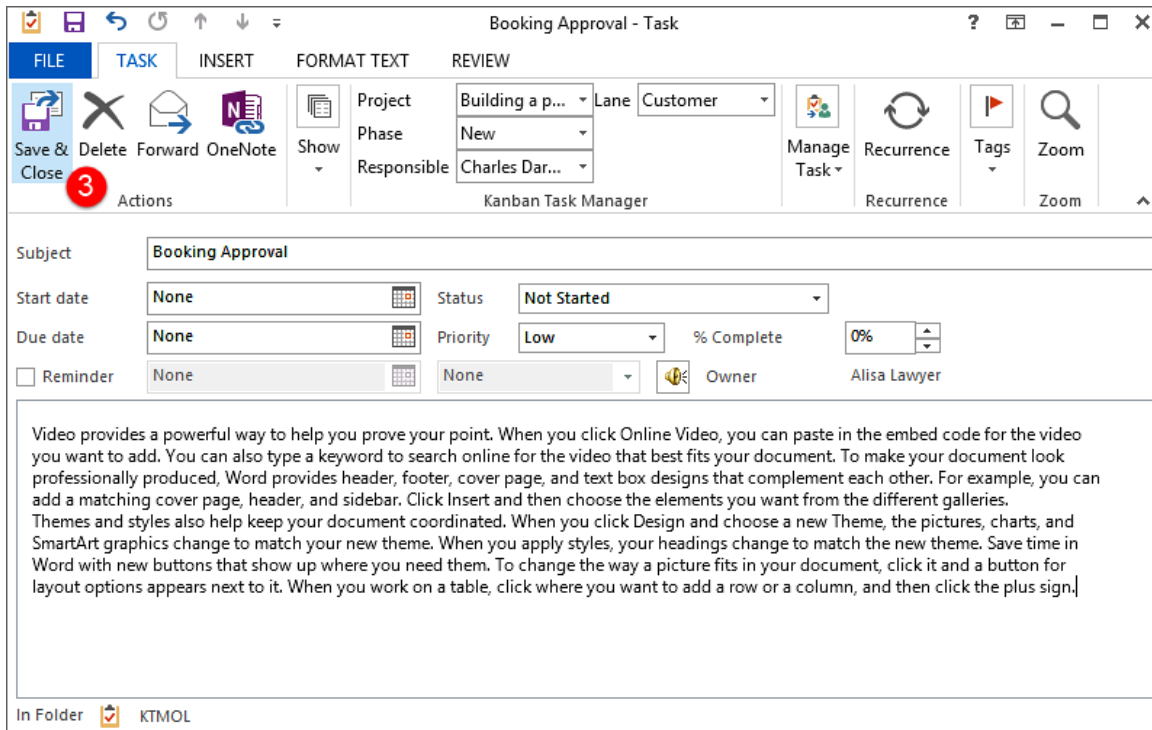
The same button is also displayed in the open e-mails, and then you only have to click on the button to create a task from the e-mail.



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.



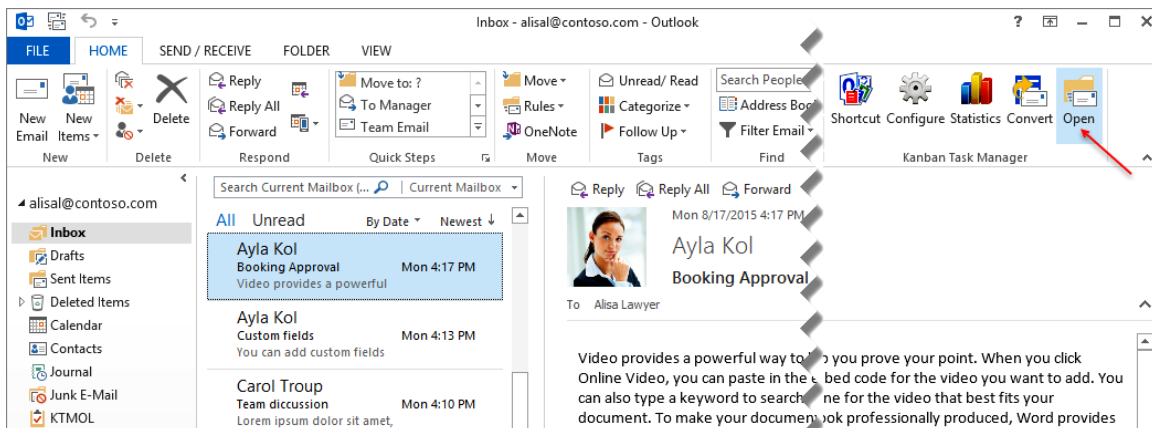
If you choose to not open the task, you can find it in the first phase on the kanban board.

6.8.1 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.

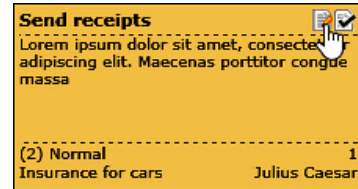


The Open button is also displayed in open e-mails if they have been converted into tasks.



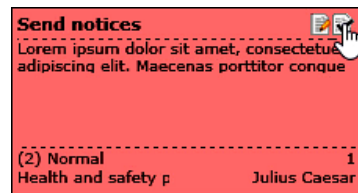
6.9 EDIT TASK

When you focus on a kanban card, the Edit button becomes visible, and you can open the task for editing by clicking on it.



6.10 DELETE OR CLOSE A TASK

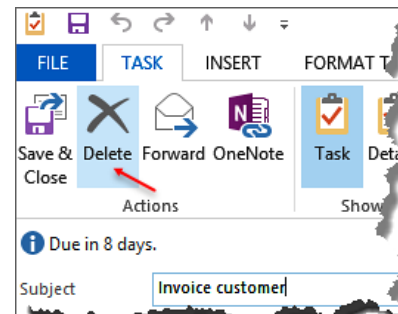
When you click on the close button on a kanban card, the item will be either deleted or moved to a phase specified by the administrator.



6.11 DELETE TASK

When the administrator has decided that the Close button on the tasks should be used to move tasks to a specified phase, you can delete a task by opening it and clicking the "X" button in the Outlook ribbon.

Then the task will be deleted from Outlook and also from the database/SharePoint list used with *Kanban Task Manager*.



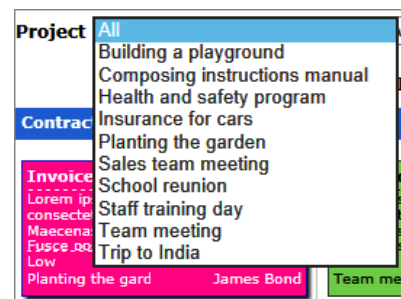
6.12 FILTER TASKS

You may filter tasks by project, responsible and/or priority. If an extra field has been added, you can filter the tasks by that parameter too.

Project Sales team ▾ Responsible Easter Bunny ▾ Priority High ▾

When you select a value from the dropdowns in *Kanban Task Manager*, the tasks with that value will be shown on the kanban board.

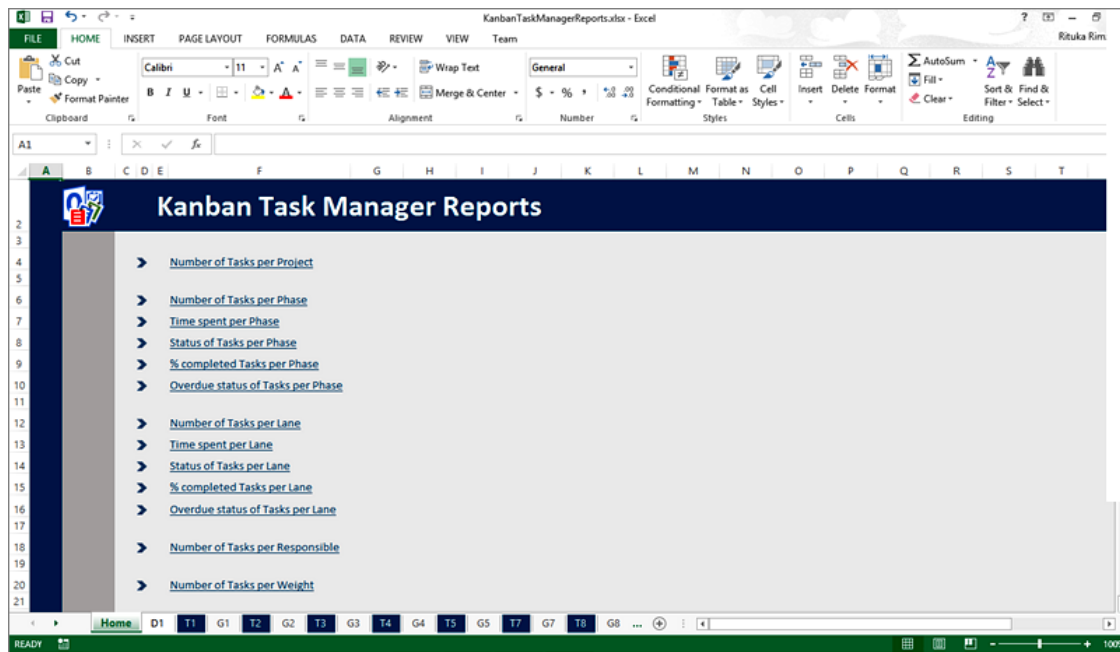
All the tasks will be shown when you select All



7 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* ribbon group, or by running the file *KTMExampdata.exe* in the installation folder.

Kanban Task Manager creates 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.



Kanban Task Manager offers several Excel reports:

- Number of Tasks per Project
- Number of Tasks per Phase
- Time spent per Phase
- Status of Tasks per Phase
- % Completed Tasks per Phase
- Overdue status of Tasks per Phase

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

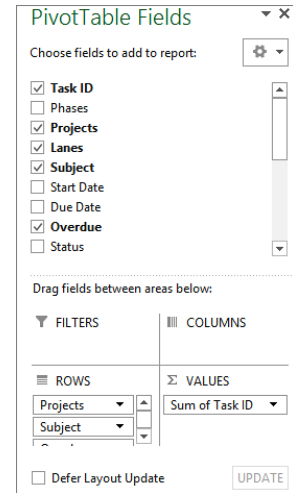
- Number of Tasks per Lane
- Time spent per lane
- Status of tasks per lane
- % Completed tasks per lane
- Overdue Status per lane

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.

All the Excel features may be used with the *Kanban Task Manager* reports, and the field list is populated with fields suitable for the task reports.

Any customizations or changes will remain in next report if you save them.



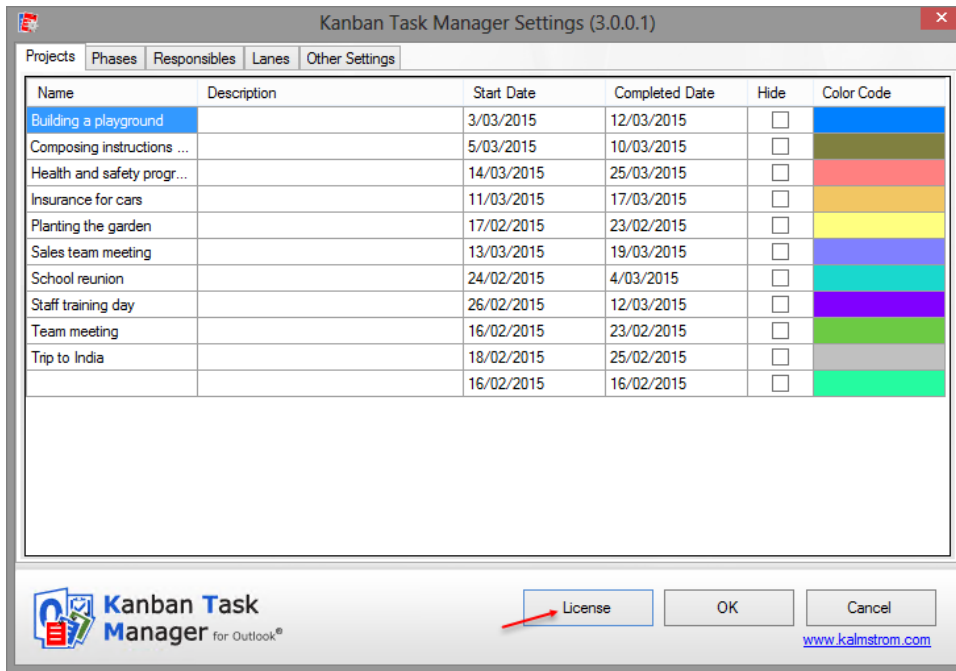
8 UPGRADE

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.

9 REGISTRATION AND TRIAL INFO

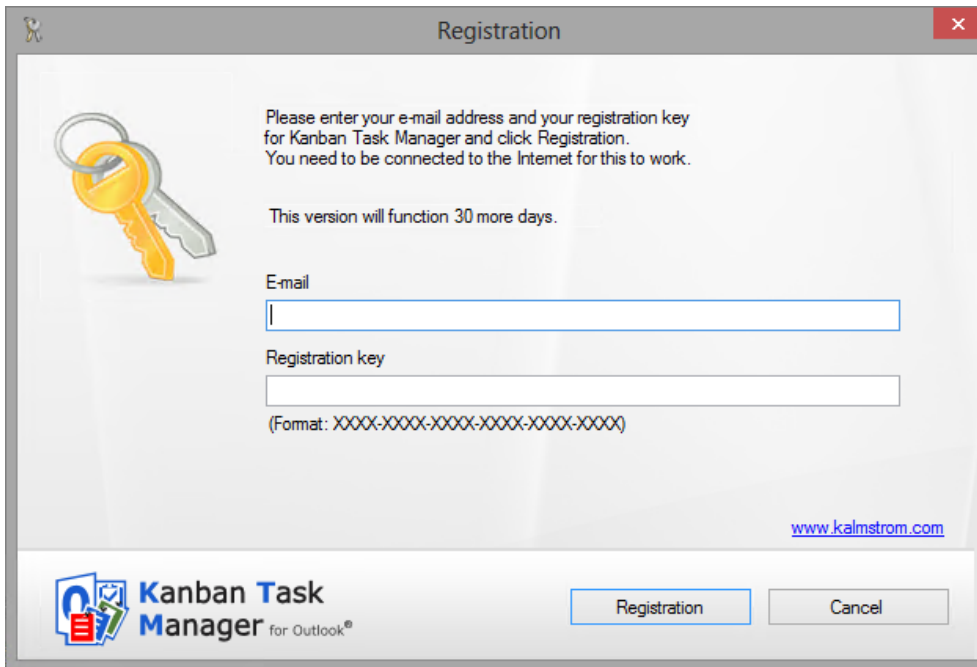
You may evaluate *Kanban Task Manager* for 30 days. If you want to continue using the solution after the trial period, you must either register it or order a Premium subscription.

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



Name	Description	Start Date	Completed Date	Hide	Color Code
Building a playground		3/03/2015	12/03/2015	☐	Blue
Composing instructions ...		5/03/2015	10/03/2015	☐	Green
Health and safety progr...		14/03/2015	25/03/2015	☐	Red
Insurance for cars		11/03/2015	17/03/2015	☐	Yellow
Planting the garden		17/02/2015	23/02/2015	☐	Orange
Sales team meeting		13/03/2015	19/03/2015	☐	Purple
School reunion		24/02/2015	4/03/2015	☐	Light Blue
Staff training day		26/02/2015	12/03/2015	☐	Pink
Team meeting		16/02/2015	23/02/2015	☐	Light Green
Trip to India		18/02/2015	25/02/2015	☐	Light Yellow
		16/02/2015	16/02/2015	☐	Light Orange

The registration is made by the first user/administrator for all users. Enter an e-mail address with your company domain and the registration key you have received from the kalmstrom.com Support and click Registration. You must be connected to the internet for this to work.



10 SUBSCRIPTION

Kanban Task Manager is subscribed to, and there are three subscription levels, Minimum, Medium and Premium, and support, upgrades and an unlimited number of users within the subscribing organization are included in all levels.

For information about the subscription levels, please refer to <http://www.kalmstrom.com/products/TaskManager/KTMOutlook/SubscribeOL.htm>

If you are already a **Premium** Subscriber, you may use *Kanban Task Manager* without paying any extra fees. Just contact the kalmstrom.com support team at support@kalmstrom.com and ask for a registration key or a register free Premium copy with your company logotype.

If you have a **Medium** subscription to *Kaban Task Manager for SharePoint* you may also use *Kanban Task Manager for Outlook* without extra cost.

11 CONTACT

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

E-mail support@kalmstrom.nu – Technical issues
 sales@kalmstrom.nu – General issues

Telephone +46 739 206 106 Within USA: (800) 518-4155

Online chat www.kalmstrom.com

12 UNINSTALLATION

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

