

Virtual Kanban Board in Microsoft Teams / Continuous Improvement

What is best to use? Comparing physical and digital Kanban boards:

	Physical boards	Digital boards
Pros:	<ul style="list-style-type: none"> • Are always on. • Are simple to set up. • Are simple to show to others. • Are easy to understand • Are great for first-time users because the simple tool doesn't get in the way of the work itself. 	<ul style="list-style-type: none"> • Work well with remote team members. • Can be updated from any place, any time. • Are easy to share with others. • Can asynchronously track an infinite number of conversations and attachments related to different tasks. • Can notify team members of progress and changes, helping to reduce the need for meetings • Are available with sophisticated, easy to generate reports and metrics.
Cons:	<ul style="list-style-type: none"> • Not ideal for remote workers or those with illegible handwriting. 	<ul style="list-style-type: none"> • May have a longer learning curve than a physical board, team members potentially need to learn a new software.

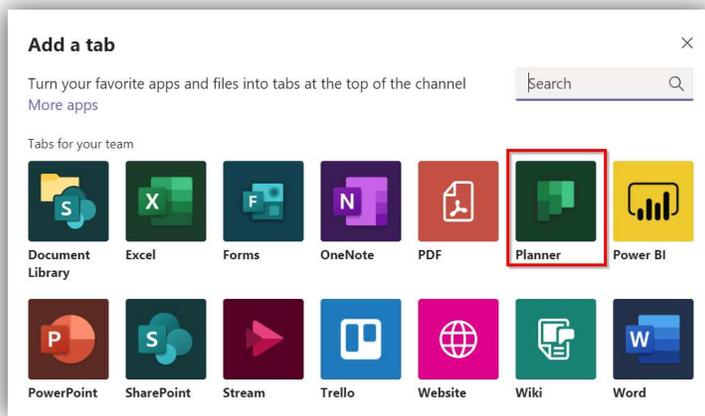
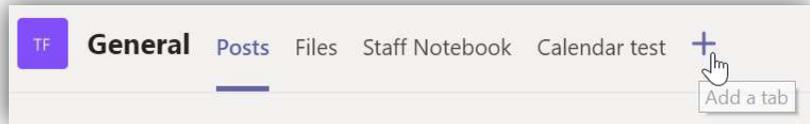
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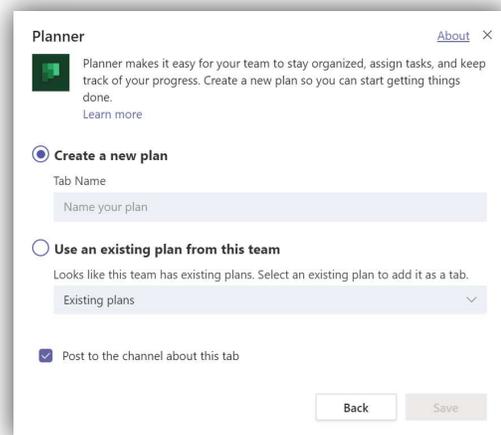
1. Creating a virtual Kanban board in Microsoft Teams – “Stop Starting and Start Finishing”

Add a **Planner**, a virtual Kanban board to your Microsoft Team that will make it easy for you/your team to stay organized, keep track of your process and assign tasks. To create a virtual Kanban board, follow the below steps: Click the + sign to add a new tab to your selected channel (please note that tabs, like virtual Kanban boards, do not carry across channels).



Select the Planner type tabs for your Microsoft Team

Name your Kanban board – once created, you should be able to more easily recreate a board on other channels in the future (please note that you cannot use an existing board from a different Microsoft Team)



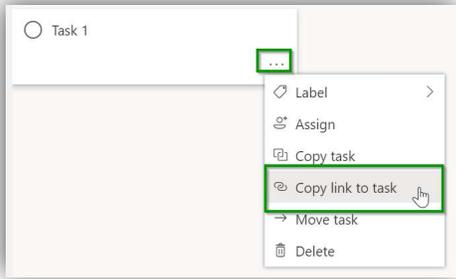
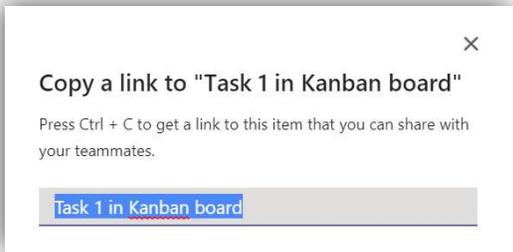
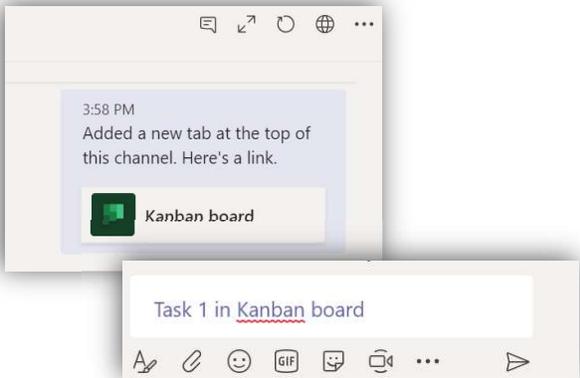
After clicking Save, your Kanban board will automatically appear as a new tab.

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2. Tab Conversation - @ mentioning task cards or Team members

Click the chat icon  on the far right side of the screen to start a (new) conversation that will be visible to all Team members.

- Here, you can use **@mention** to ask someone a question, or bring someone's attention to a card for example.
- Use **@addyourTeamsNamehere** if you would like to notify everybody through their Activity hub.
- **To reference a specific card** (on Teams, in an email message, chat message, etc.):

<p>1. Get a direct link by clicking on the ellipsis icon (...) on a card and select Copy link to task</p>	
<p>2. When prompted, press Ctrl + C to get a link to the selected card</p>	
<p>3. After navigating to the conversation tab, paste the hyperlink in the Reply box</p>	

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3. Expand & Collapse Tab

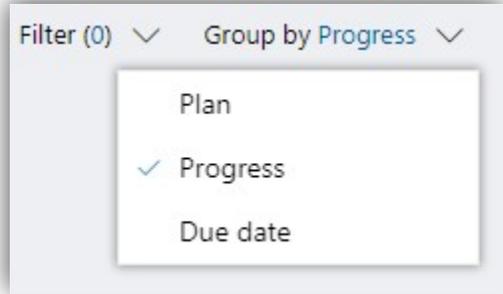
Click on the   icons to enter or exit full screen mode.

4. Reload Tab Button

With the **Reload Tab button**  you have an easy way to check for new cards/files or any other changes that might have happened since you last opened the tab. Useful when you share a Kanban board with other users who are actively commenting on cards or using the conversation tab; particularly when a phone call, incoming email took focus from an opened up Planner tab.

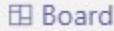
5. Go to Website – how to see all task cards assigned to you across all Plans

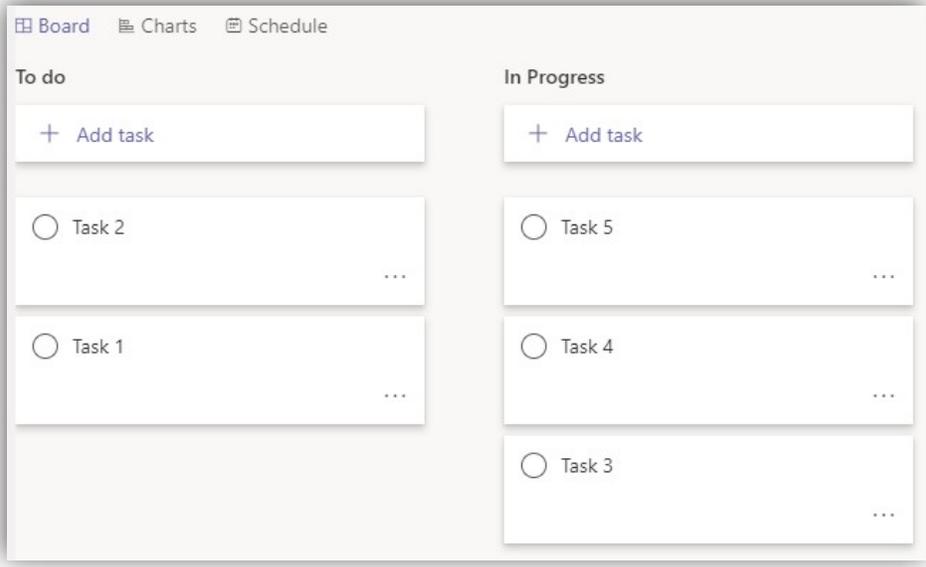
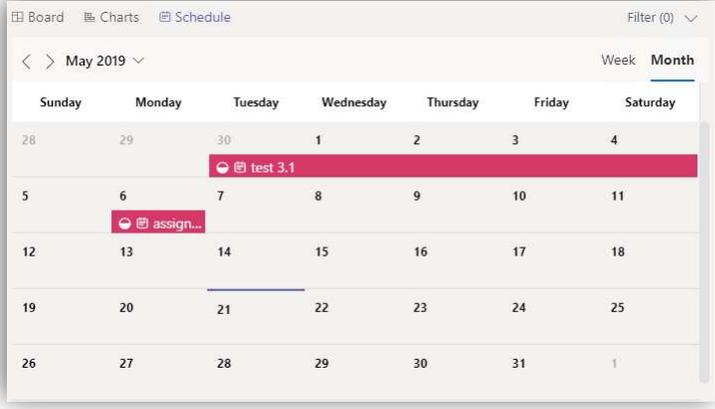
The **Go to Website**  icon will open the Planner site in the Office 365 group for the Team.

<p>1. Here, if you would like to see all tasks assigned to you across all plans:</p>	<p>Click on the My Tasks button  on the left side to display all task cards grouped by their Progress Status (Not Started, In Progress, and Completed).</p>
<p>2. This default grouping can be changed to Plan or Due Date by clicking on the Group by selector dropdown arrow in the top right corner.</p>	

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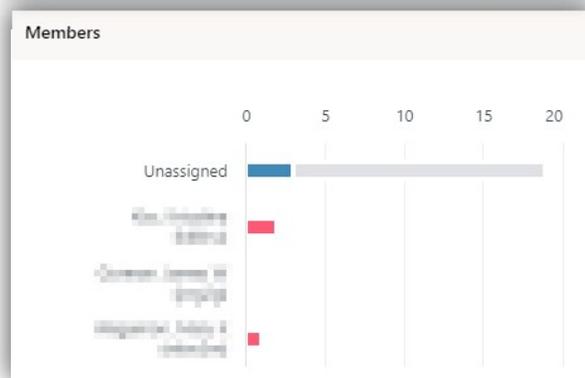
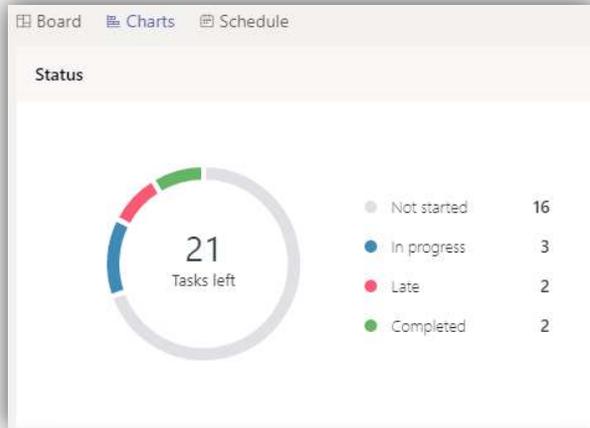
6. Board vs. Charts vs. Schedule View

Use the  **Board**  **Charts**  **Schedule** buttons to change between a list/dashboard and calendar views.

<p>Board</p>	
<p>Schedule</p>	

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Charts

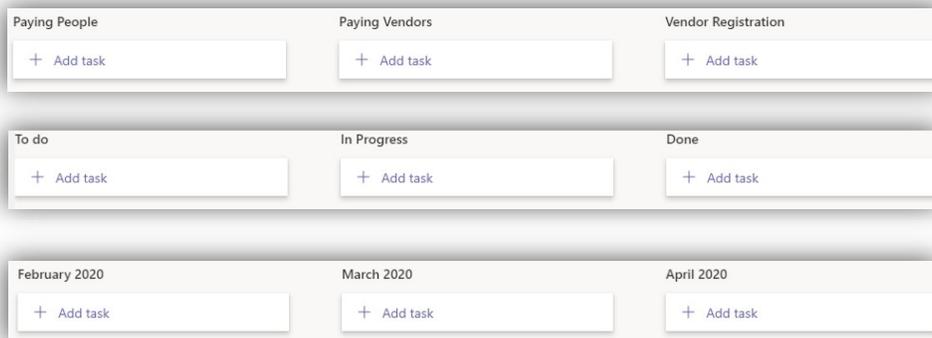


7. Virtual Kanban board structure & setup tips (Buckets/Labels)

Planner uses **Buckets** as columns to organize task cards and break them up for example by:

- departments/units/teams
- priority
- phases (To Do, In Progress, Done)
- months

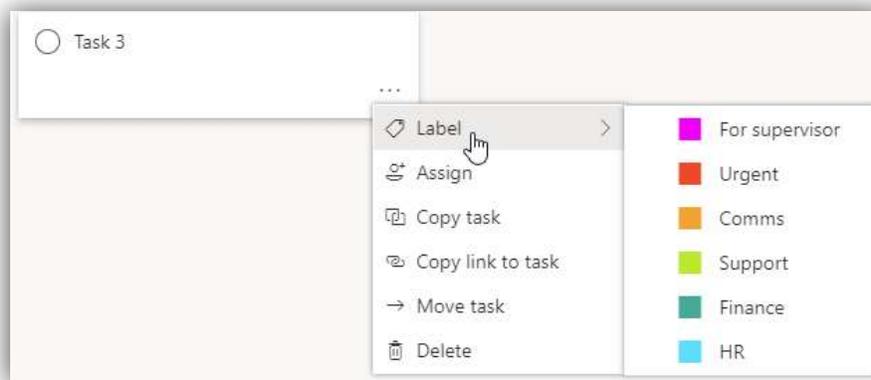
or whatever makes sense to the individual or individual teams.



Labels can help you quickly see certain things that several tasks have in common, like requirements, locations, important time constrains.

Please note that you only have 6 options, and you cannot add more labels that what is provided!

To rename your labels, open a task card, hover over the color coded labels on the upper right side of the card, click on and overwrite the standard naming.

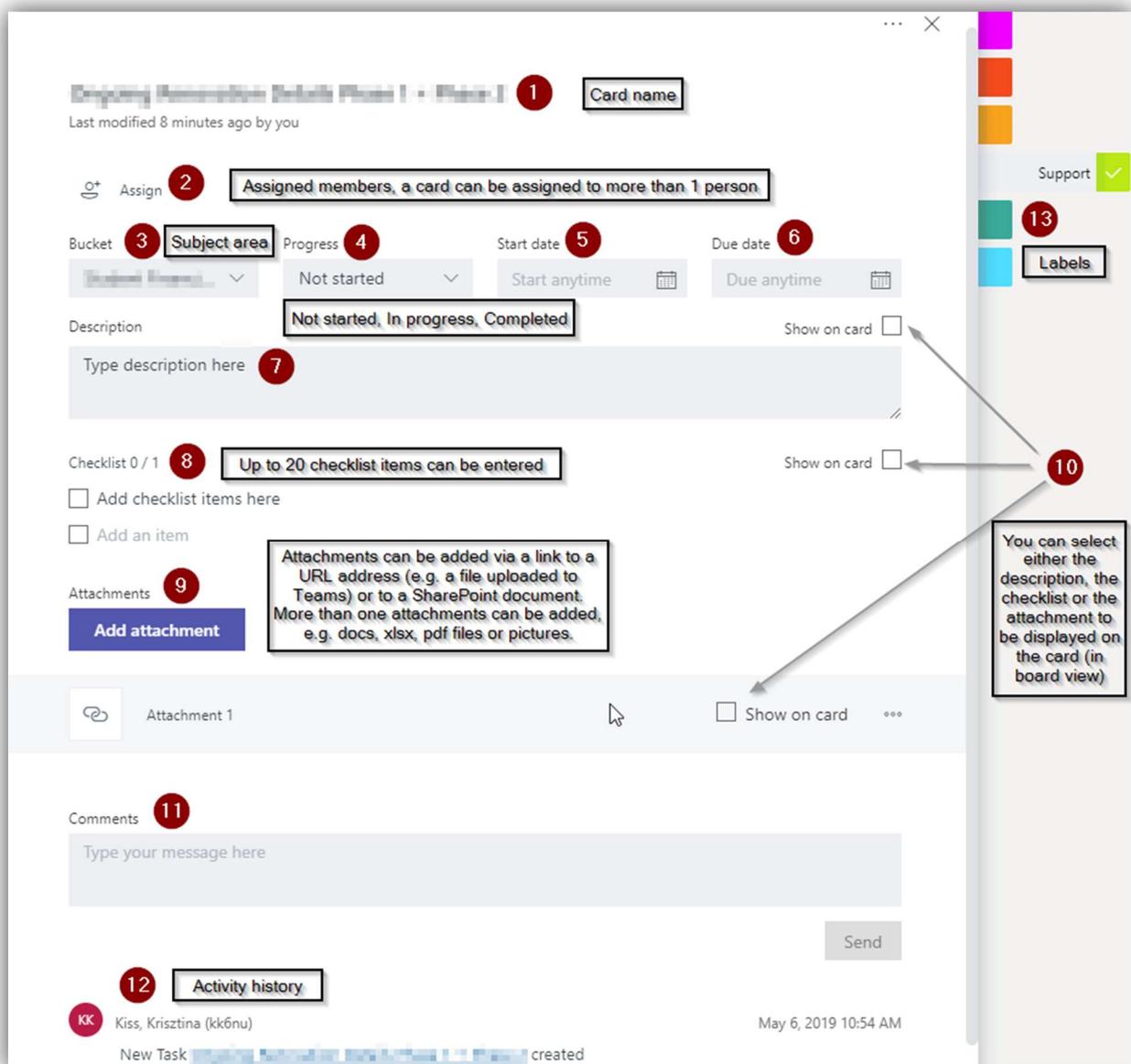


8. All about Task Cards

a. Card Features

To create a new card: Click on the + sign under a subject area and complete the card name, due date (optional) and assignment fields (optional). Once clicking on the Add Task, a card will be created and displayed in Planner.

Task card details: Clicking on the card itself will display the full details associated with the card.

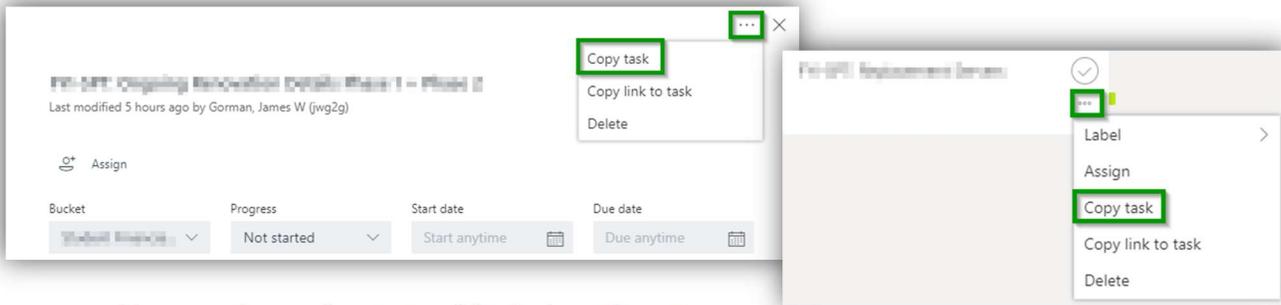


The screenshot shows the 'Task card details' view in Microsoft Teams. The card is titled 'Empoing Reserative Details Phase I - Phase I' (1) and is assigned to 'Support' (13). The card is in the 'Subject area' bucket (3) and is 'Not started' (4). The start date is 'Start anytime' (5) and the due date is 'Due anytime' (6). The description field (7) contains 'Not started, In progress, Completed'. The checklist (8) has 0/1 items, with a note that 'Up to 20 checklist items can be entered'. There is one attachment (9) named 'Attachment 1'. The comments section (11) is empty. The activity history (12) shows the card was created by 'Kiss, Krisztina (kk6nu)' on 'May 6, 2019 10:54 AM'. A 'Labels' section (13) is visible on the right. A callout box (10) indicates that users can select to display the description, checklist, or attachment on the card in board view.

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b. How to escalate a card from a different plan

To copy a card: click on the ellipsis (...) sign in the top right corner of the card and select **Copy task** when prompted. Or you can open the card's **More** menu directly from the board, and select **Copy task**.



You can change the name of the task card, copy the card to a different plan, select a different bucket and choose which data you are going to copy over:

Copy Task

New task name

Plan name **1** ▼

Bucket name **2** ▼

Include **3**

Some task information cannot be shared across plans/groups. [Learn more.](#)

- Assignment
- Progress
- Dates
- Description
- Checklist
- Attachments
- Labels

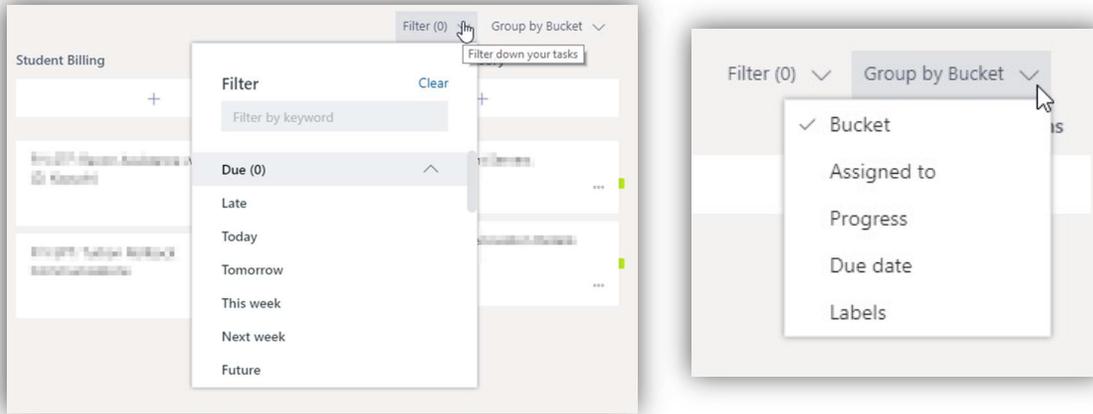
When copying a card, you can choose which data you are going to copy over.

Description, Checklist, Attachments and Labels are copied by default within the same plan, if you don't want to copy that information over, you can uncheck any of those selections.

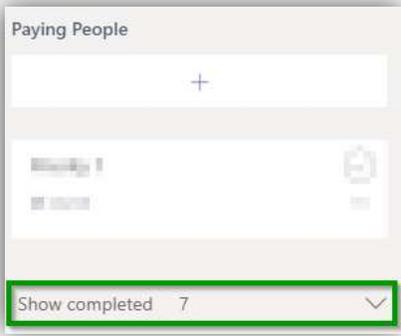
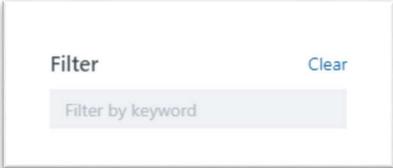
Please note that Assignments, Attachments and Labels are Plan specific, thus can only be copied within the same plan.

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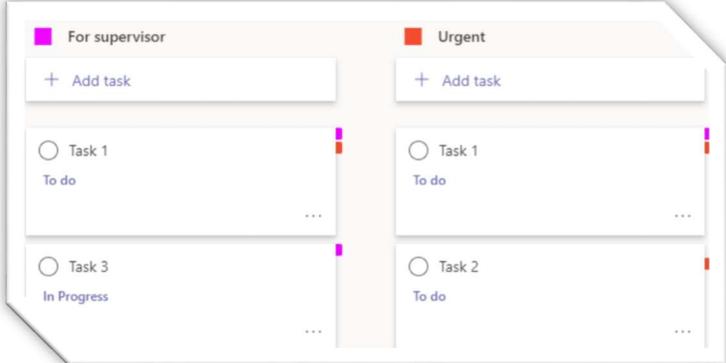
9. Filtering vs. Board views (How to quickly restructure your virtual Board)



The below filters are available for filtering cards, **however, you may just want to change how the board is structured**

Default filtering options	Filtering tip	Filtering by keyword
<ul style="list-style-type: none"> ✓ By due date, including <ul style="list-style-type: none"> ✓ Overdue (or Late) Cards ✓ Cards due Today / Tomorrow / This week / Next 7 Days ✓ Cards due in Future ✓ Cards without a Due Date ✓ By Label ✓ By Bucket ✓ By assignments 	<ul style="list-style-type: none"> ✓ By default, non-completed items are displayed and completed cards are hidden (please see below) 	<ul style="list-style-type: none"> ✓ Please note, you can filter by keyword! This could be used as search when <u>searching for a card by its title</u>, but it won't work as a global search (it doesn't return keywords from description fields, checklists, comments, etc.) 

Board views

<ul style="list-style-type: none"> ✓ By Bucket (default) ✓ By Assignment ✓ By Progress (see below) ✓ By Due Date ✓ By Labels (see on the right) 	
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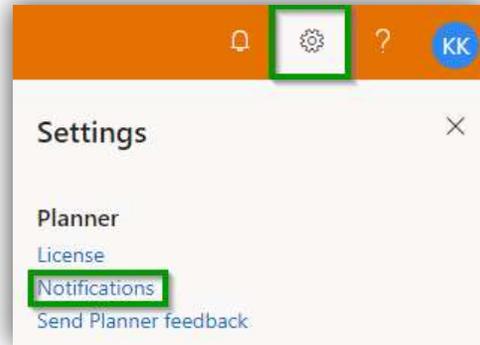
10. Notifications from Planner

By default, Planner sends emails:

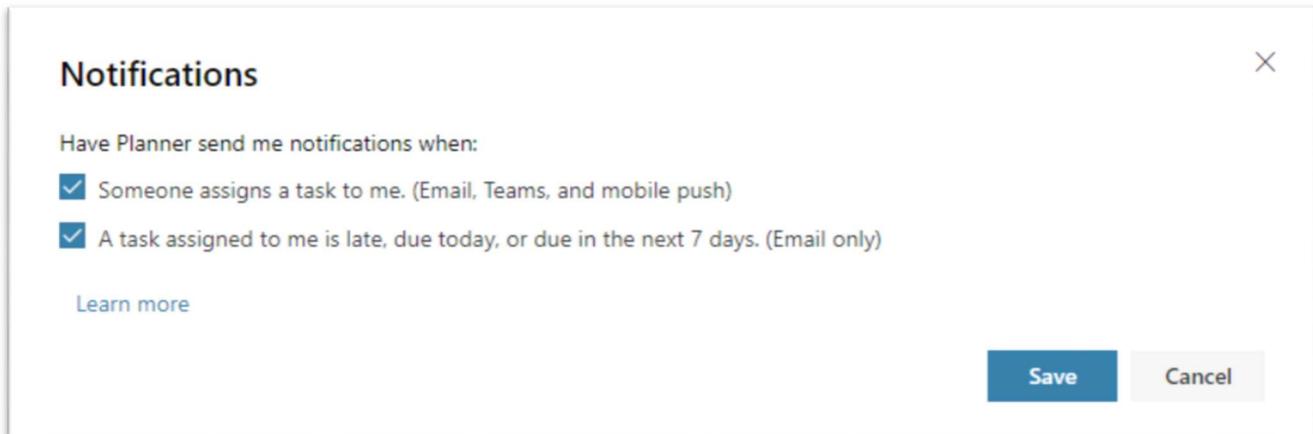
- When a card is assigned to you
- When a card is late, due today, due the next day, due in 7 days (this email will include information from all Plans from all your Teams)

To change this:

1. Go to website 
2. Click on settings in the top right corner then on Notifications



3. When prompted, you can choose when to receive email notifications



When you post a comment on a task card, you will receive email notifications in your inbox for each subsequent comment made on that task by others (if a board is shared).

There is no functionality in Planner to follow a card for updates, this feature can be used as a workaround for that functionality.

11. The Planner App



The *Planner app* is available both for Android and iPhones if you would like to have access to your virtual Kanban board on your mobile device.

12. Administrative Tips

- By default, non-completed items are displayed and completed cards are hidden. There is no functionality for archiving cards, if future information is expected on a card, mark it completed and keep it hidden until card needs to resurface on the board with new information. This way you can keep historic information, only delete cards when no further development, new information is expected.
 - Purging of completed items should take place at pre-determined intervals.