Getting Started with

KANLAH!

a slightly technical guide to Kanban, made in Singapore.

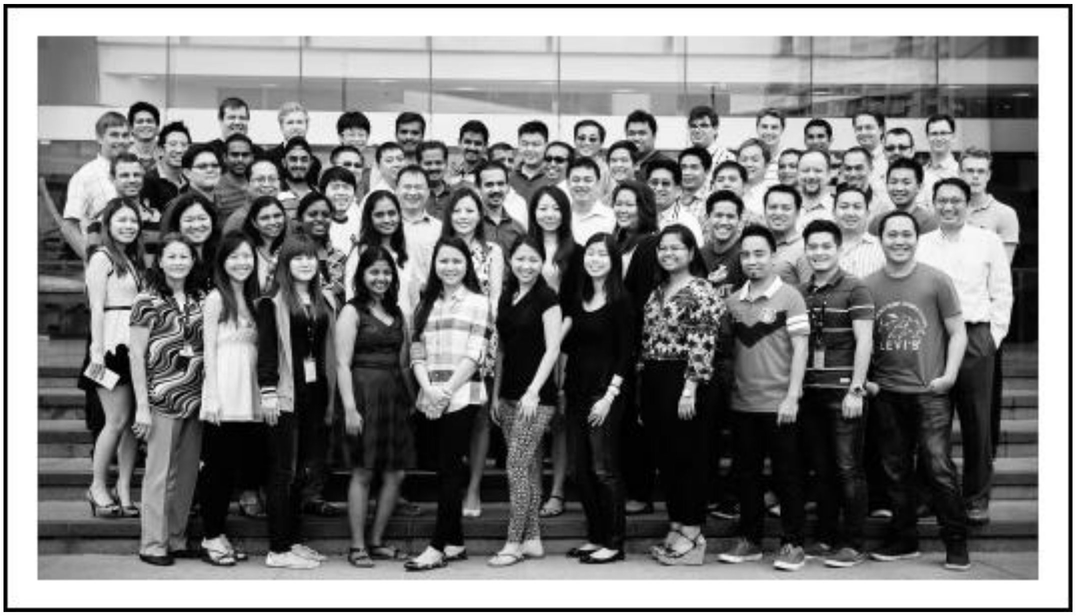
We're really interested to know how people use Kanlah and what they think of it. If there's anything you want to ask about, or suggestions for future development, get in touch with us at **hello@kanlah.com**

Table of contents

1 About Us

Kanlah is a free system provided by LEO TECH Services Pte Ltd, based in Singapore.

We call ourselves an 'IT Enabler', helping organisations all over the region better engage with their audiences. As well as relatively short term project work, and beyond our public and private sector joint ventures, we're a VC -bringing software, infrastructure and consultant expertise to start-ups and SMEs.



Our teams (of developers, engineers, designers, testers…) use Kanban to track our tasks and when you visit our offices you'll see dozens of post-it notes on the walls representing all kinds of projects. That's convenient for us as we all work out of the same office.

Not everyone has that luxury, or the budget for post-it notes. So when some of our developers needed a training project to slide elements around the screen, an online Kanban board was the first thing that came to mind. We think it turned out pretty well, and so we decided to share it with the world.

It's not surprising that a system for visualising projects is pretty self explanatory, and we expect most people will just take their free sign up and jump right in - but well done for taking a moment to read the instructions. Keep this document handy to refer to if you get stuck.

And if you want to go deeper and find out more about Kanban, we find that http://guide.agilealliance.org/guide/kanban.html is pretty hardcore.

2 GETTING STARTED WITH KANLAH!

Kanlah was created to give everyone an online tool to plan and manage almost anything in life via a visual task board. It also allows you to easily distribute tasks, track progress and collaborate with your team online.

This guide talks about Projects and the bits and pieces inside them. Here are some of the definitions we're going to use:

Boards are the screens which show you the progress of particular tasks. A project might have one or several Boards. For example a wedding could have a board for *Honeymoon* and another for *Reception*.

Cards sit on the Boards, and contain everything you need to know about a specific task. What the task is, who's assigned to it and so on. You'll find people use the terms 'cards' and 'tasks' interchangeably.

Columns (sometimes referred to as 'lists') represent stages that the cards pass through over time. Traditionally, cards are moved from left to right as progress on each task is made. For example from the 'Pending' column to the 'In Progress' column to the 'Testing' column through to 'Complete'. Kanlah lets you set up as many Columns as you like, calling them whatever you like –as visualizing the stages tasks in a Honeymoon project can be very different to one visualizing a mobile app delivery (eg Pending, Discussed, Decided, Paid For).

Members are the people who are associated with a Project or Board. A Member of a Project might have access to a Board, so they can see what's going on, but not be assigned to any specific Cards on the Board. Another Member might be part of an overall Project, but not be associated with a Board which doesn't concern them. So your mother-in-law might be a Member of your Wedding Project, but they're only assigned to the *Reception* Board, and not the *Honeymoon*.

2.1 Creating an Account and Sign In

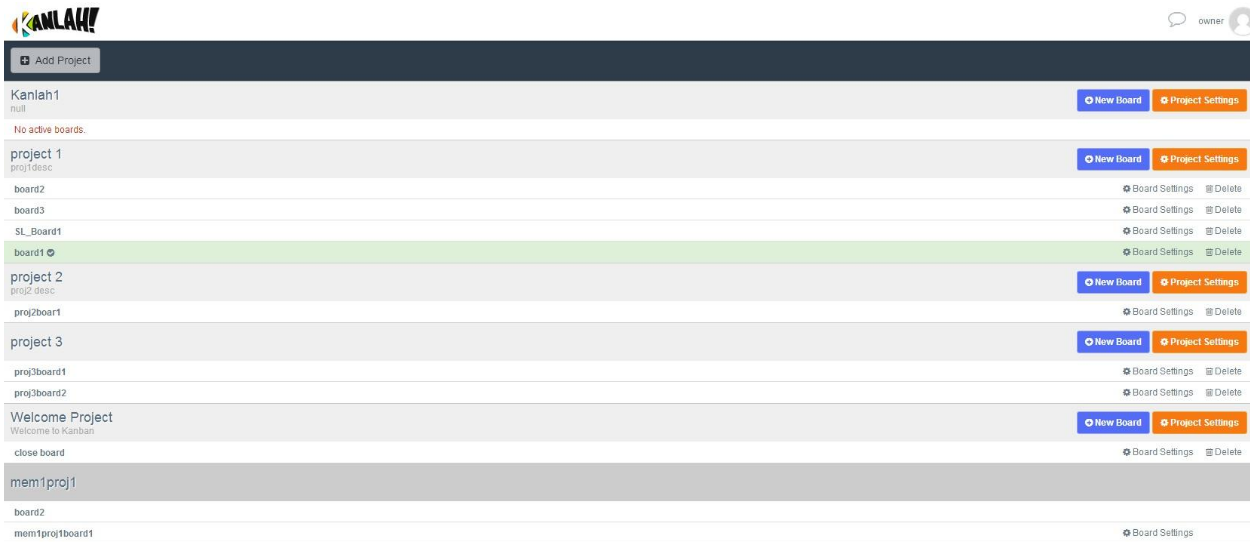
To start using Kanlah, go direct to http://we.kanlah.com or follow the [FREE REGISTRATION & LOGIN] button at the http://www.kanlah.com. Then you can either Sign In with an existing account, or click the [Create an Account] button to register a new one. When you register you'll be asked to:

1. Enter your **Display Name**. This is the name you'll go by on Kanlah -what people on the system will see when they're looking at something related to you. Like when they're looking at a list of team members or checking who is assigned to a task. Your Display Name has to be between 2 to 60 characters.
2. Enter your **E-mail address**. Then confirm that you typed it right the first time by typing it again.
3. Enter a **Password**. It should be a minimum of 6 characters.

Once you sign up, an email will be sent to your e-mail id for the activation of your account. Click the link in email to confirm. Sign In again to the website.

2.2 The Dashboard

The Dashboard is the first thing you see when you log in consists of the following menu, an at-a-glance menu of your Projects and Boards.



2.2.1 Creating a New Project

2.2.1.1 What is a Project?

A project is a sequence of tasks that follow different steps (for example 'Pending, In Progress, Tested, Complete) and which can be handled by you or assigned to Members of your Project's team. It can contain one or more 'Boards' showing collections of tasks -think of them as sub-projects- within your project. So a wedding project might have one board for Honeymoon, and another for Reception.

2.2.1.2 How do I add a Project?

1. Click the [Add Project] button near the top left of the Dashboard.
2. Enter the Project Name.
3. Click Save.

Once the Project is created, you can create the Project settings to Manage Project, Manage Team and Manage Labels.

Manage Project allows you to change the Project name and add a description to the project.
Manage Team allows you to add and update Members to the team in your selected project.
Manage Labels allows you to label tasks

2.2.2 Creating a New Board

2.2.2.1 *What is a Board?*

It's where the action is. The display showing all the tasks, their status and who's assigned to what.

2.2.2.2 *How do I create a Board?*

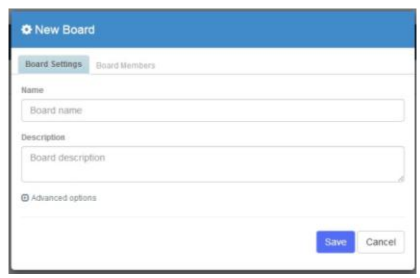
Once the project is created, create a Board for tracking it. To create a new board,

1. On the Dashboard, beside whatever project you're interested in, click the [New Board] button.

2. There are two menus available – Board Settings and Board Members.
   Board Settings allows you to add/change the name of the Board and to add a description.
   Board Members allows you to assign Members to the Board. To do this, drag and drop Members from the overall list of Project Members.

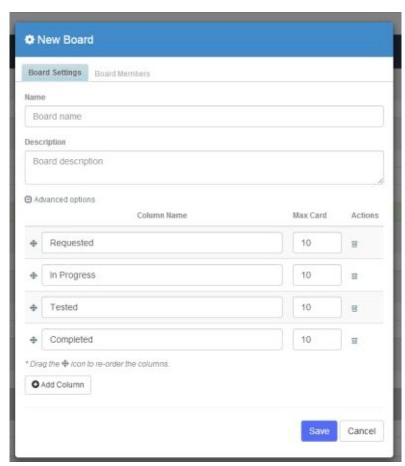
   Note that Project Owner and Project Admin are the default Board Members and cannot be removed. The Members are categorized into 4 types:

   - Owner
   - Project Admin
   - Board Admin
   - Board User



3. Click **Save**.

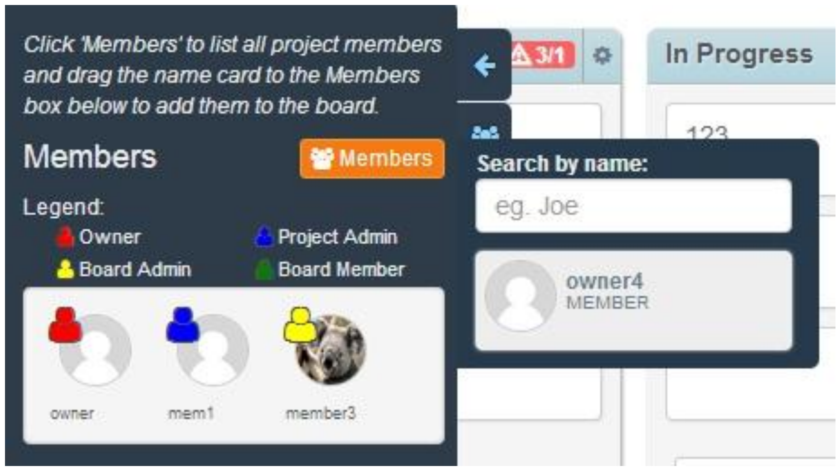
4. You might like to click 'Advanced options' to set/add columns, column names and a maximum number of cards that can be added to each. Drag and arrange with the icon ✥ up and down the window to re-arrange the order in which the columns are presented on your Board.



2.2.2.3 *Board Management Menu*

The Member list displays all the Members associated with a particular project. To add a Member to the Board, they should already have been added into overall Project Team.

1. Click [Members].



2. This will open up a search box for you to look for people, who are already Members of your project, who can be added to this particular board.

3. Drag and drop Members from the search list to the list of Members working on the Board. So in the illustration you could drag 'owner4' across to the left to join the other three people already working on the Board.

4. The details of each Member can be seen when mouse over on their avatar or Display Name. To assign permissions to each Board Member, click their avatar (so in the illustration, you'd click on the koala to change the permissions for 'member3').

   Remember: Members must already be part of your Project before thay can be added to one of your Boards.

2.2.2.4 *Board Activities*

Activity is the archived list of the tasks for a particular column. What some people call an audit trail, it keeps track of which Board Member changed what, when.

2.2.2.5 *Deleting a Board*

On the Dashboard there’s a delete icon for every Board.

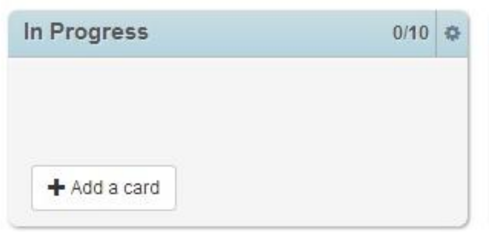
1. Click Delete for the corresponding Board to be deleted.

2. You will be asked to confirm the deletion.

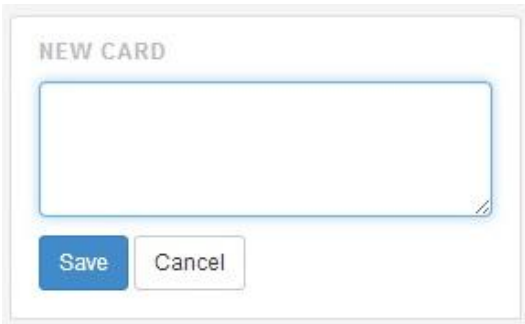
2.2.3 Adding Cards to the Board

A Card contains the details of a specific task on the Board.

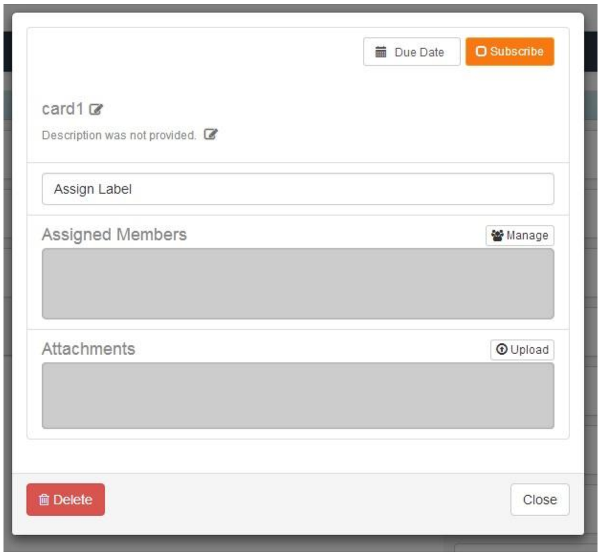
1. On your Board, in the column you're interested in, click the [Add a card] button.



2. Enter the name of the task in the name window and click **Save.**



3. You can double click on the card to manage its properties.



You can include the following bits of information on each Card to describe the task. Skip or include them as you wish.

Due Date
The completion date associated with the specific task. The Board will highlight any overdue tasks so it's a useful way of visualizing how things are going.

Subscribe
Select this to receive the notifications whenever this specific Card (task) is updated. Say when it's moved to another column, from 'Testing' to 'Complete' for example.

Description
The description of the task. Notso important if you're a one person team, but handy if you have a lot of people involved.

Assign Labels
When you click Assign Label, you are shown a list of colour-coded tags which you can assign to the Card. So for example you could colour code the *types* of tasks in a project ('Design', 'Research', 'Accounting'…) and get a better idea of your Project's status next time you or your colleagues look at the Board.

Assigned Members
Use the Assigned Members feature to add or delete the Members associated with the specific card/task. To update the roles and make changes to the Members, click the [Manage] button, and you'll be shown a list of Board Members. Drag and drop the members into the Assigned Members box.

Attachments
Click the [Upload] button to attach files if you would like to include, say, an image or a text document with the task. Useful if you want to give more detail of what the task involves, for example.

Total attachement file size should be maximum 2MB.

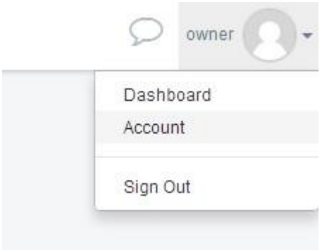
You can choose to add attachment to the card simply by clicking **Upload**.

2.3 User Profile Menu

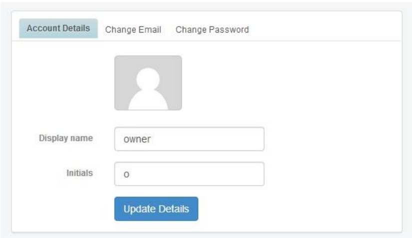
The User Profile Menu allows user to make the changes and update the user's account details.

2.3.1 Account Settings

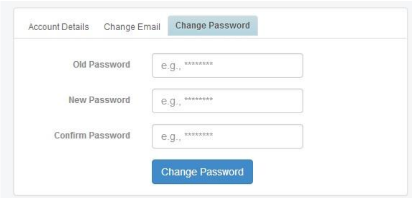
In the top right of the screen there's an avatar (the picture we use to represent you) along with your Display Name. Click it and select 'Account' to upload a new avatar photo, change your email details or password.



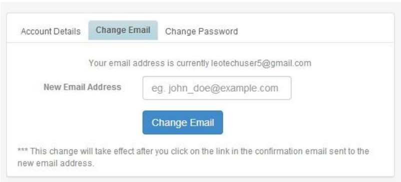
To change Display name and/or initials, click **Account->Account Details.**



To change password, click **Account -> Change Password. I**t will ask you to enter existing password (old password) and New password.



To change the email address, click **Account ->Change Email.**



A confirmation email will be sent to your new email address. Click the link provided in mail to login again with your new credentials.

2.4 Member Roles and Rights

Following table explains different roles that are involved for a project their access rights.

Roles	Owner	Project Admin	Board Admin	Board Member
View all Boards	✓	✓	Can view only assigned boards	Can view only assigned boards
Create Project	✓	✓		
Assign/Unassign Project Admin	✓			
Auto assigned to new Board	✓	✓		
Manage Board members	✓	✓	✓	
Assign/Unassign Board Admin	✓	✓		
Manage Board Settings	✓	✓	✓	
Delete Board	✓	✓		