

Kanban Boards: Panels that organise data by "Status"

Kanban boards are an innovation of Japanese management theory used to organize data into categories according to the level of completion some work or operation. Original Kanban boards were just physical notice-boards with hand written-notes about "jobs" included on them. As a job went through different steps these hand-written notes would be moved from one board to another.

Orixa includes an automated mechanism for adding software "Kanban boards" to your applications. Any BusinessObject which includes a "StatusID" field can be given a Kanban board, the board will automatically have one section for each "Status" that the BusinessObject can have. Kanban boards can be created at the "Entity" level (so you see all records in a data-table) or at the "Child" level, so you see all records associated with some parent record.

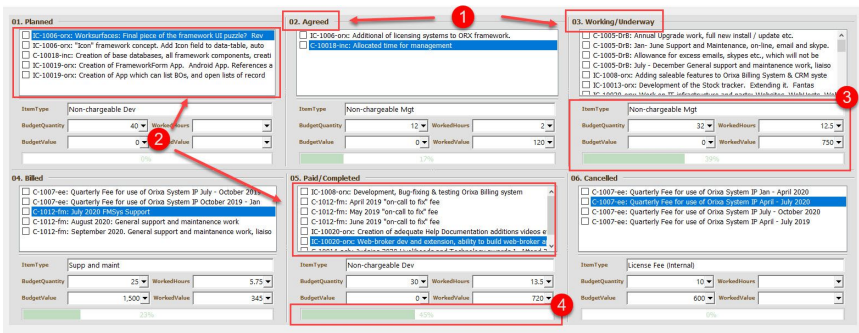
Orixa Kanban boards exist to allow users to see sets of records in different "status" levels, and to allow users to easily click and drag data between the status-levels, and to easily access edit-forms for records.

What are Kanban Boards for?

Kanban boards are a widely used management tool. For more information please consult the internet. The main use of a Kanban board is in managing work-flow, where an activity has steps or stages.

Kanban boards are particularly useful for keeping track of work such as "Jobs", "Projects" or "Contracts" all of which might all have steps in their workflow such as: "In Negotiation" "Underway" "Complete" "Cancelled". Adding a Kanban board to your Orixa App allows users to easily see which items are at which step in the process, and allows users move records between status-levels.

How Kanban boards appear in Orixa

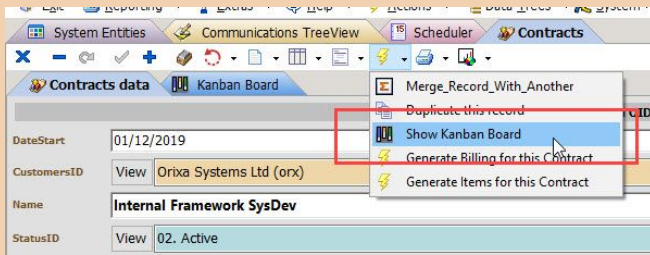


A Kanban board with 6 levels of status. Note that the developer of the system has chosen to lay out the boards in a 3 x 2 grid.

1. For each "Status" that exists for a particular BusinessObject, Orixa will add a Heading with the Name of that "Status" and below it a list of records.
2. Records will be retrieved into the Kanban Board, and each one will be placed in the board for its status. Orixa uses the "Name" of the BusinessObject to populate the list, so it will appear formatted in the same way it does elsewhere in your App.
3. Summary data (optional) can be added to each board. This shows individual data for a specific board. As you click on the items in the board these fields will fill with data. This allows easy access to key data for each record.
4. If a Field in the dataset has a name "PercentUsed" it will automatically be formatted as a "progress-bar", the Developer must ensure the data returned by the Summary-Data Query is in a range suitable for such displays. Note that if the data exceeds 100 it will be displayed in red, indicating an "over-reach" or "over-budget".

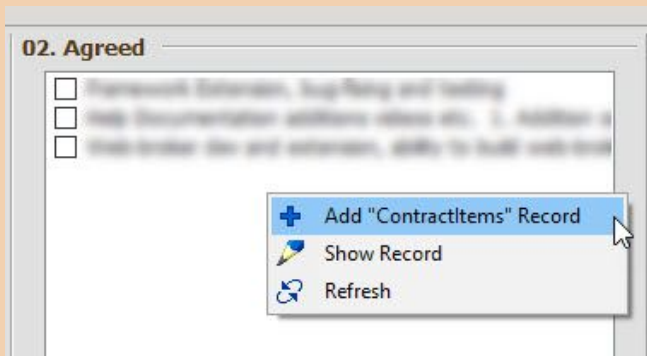
All parts of a Kanban board can be customized. The main board is set to have a number of customizable properties. The "Summary Data" is a "Layout" which can be customized in the same way as all other Layouts in Orixa.

Features of Kanban Boards



Access the Kanban Board from the Edit-Form "Actions" menu.

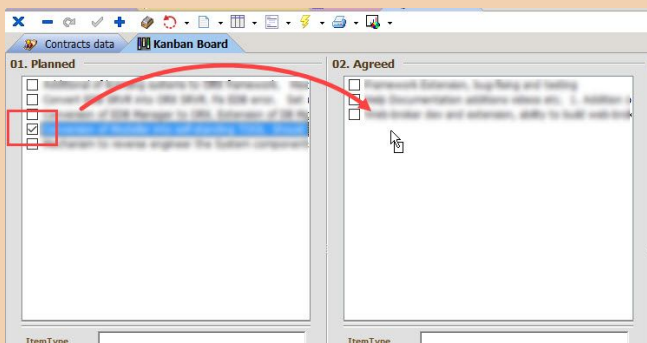
Relatively few BusinessObjects include Kanban boards. Usually they are used only for fairly specialized situations.



Once a set of boards are open, you can "right-click" on any board to access a context menu to perform actions.

Note that when you double-click on a list the clicked record will open.

If you "Add Record" the added record will automatically have its Status set to the Status of the board you have clicked.



Kanban boards include the intuitive ability to "drag" records between boards.

Click on a board and press the space bar, or click in the "tick-box" area to select a record. You can select as many as you want.

Then click and drag the selected records to a new board-area. The records will all move across. Behind the scenes in the database, Orixia will update the StatusID of the record(s) to the Status of the new area of the Kanban board.

How to add a Kanban Board

This is a more technical topic. It is covered in the Developer section of the help. You can view it here:

[Adding a Kanban Board to your system](#)