

# Portable Kanban User Guide

Dmitry Ivanov  
04.01.2018

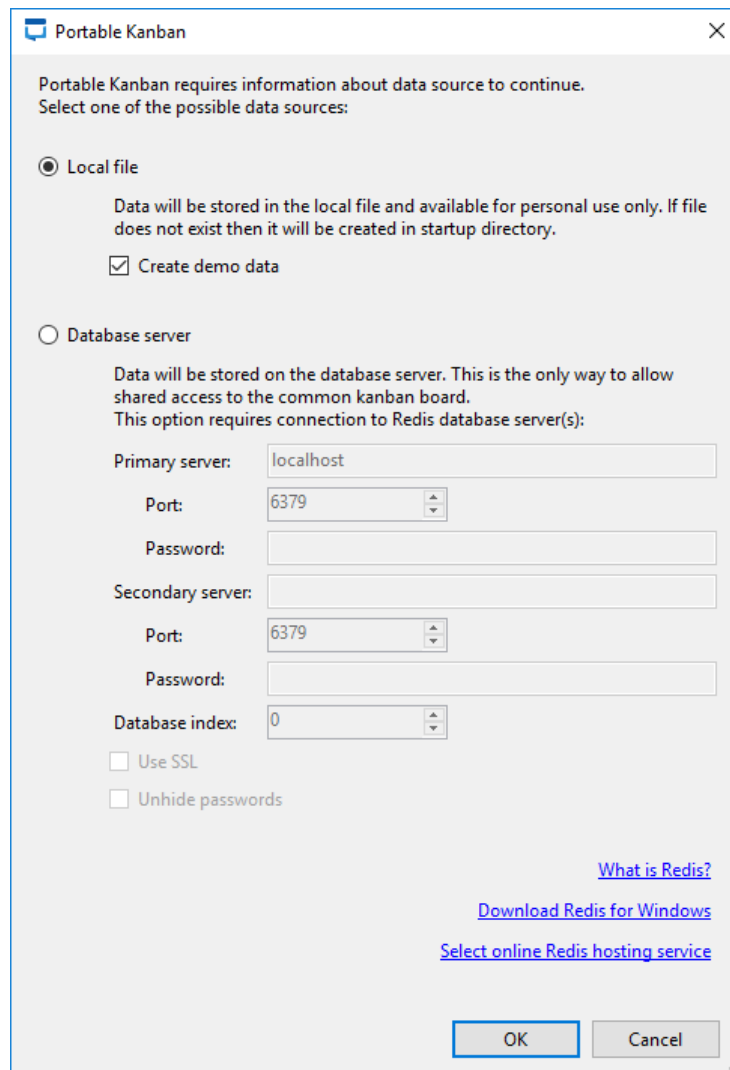
## Installation

---

### Downloading

---

- 1) Download zip file from <http://dmitryivanov.net>. There is no any installation package that may require administrator's privileges, so you can expand and run practically on any machine.
- 2) Expand zip file to some local directory, e.g. "My Documents\Kanban". Note that full read/write access is required. Portable Kanban is fully portable so you can also expand it to flash drive.  
Note: if you're installing Portable Kanban on network share please use some folder on mapped network drive.
- 3) Start PortableKanban.exe.
- 4) At the first start the program will ask you to choose data source:



The screenshot shows a dialog box titled "Portable Kanban" with a close button (X) in the top right corner. The main text reads: "Portable Kanban requires information about data source to continue. Select one of the possible data sources:". There are two radio button options: "Local file" (selected) and "Database server". Under "Local file", there is a text description: "Data will be stored in the local file and available for personal use only. If file does not exist then it will be created in startup directory." and a checked checkbox labeled "Create demo data". Under "Database server", there is a text description: "Data will be stored on the database server. This is the only way to allow shared access to the common kanban board. This option requires connection to Redis database server(s):". Below this, there are input fields for "Primary server:" (containing "localhost"), "Port:" (containing "6379"), "Password:" (empty), "Secondary server:" (empty), "Port:" (containing "6379"), "Password:" (empty), and "Database index:" (containing "0"). At the bottom left, there are two unchecked checkboxes: "Use SSL" and "Unhide passwords". At the bottom right, there are three blue hyperlinks: "What is Redis?", "Download Redis for Windows", and "Select online Redis hosting service". At the very bottom, there are "OK" and "Cancel" buttons.

### Single user mode (local file)

---

If you don't have any plans to share your tasks with anyone then choose "Local file". Data will be stored within the single file in startup directory. Simultaneous access to data file

is prohibited, so do not try to put into network folder: only one user will be allowed to access data at the same time.

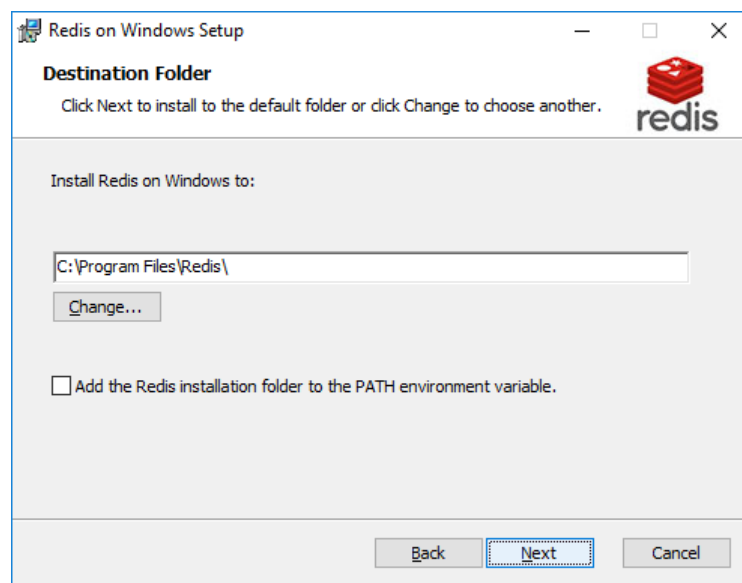
If it is the very first time you see this program I would recommend to check off “Create demo data” to get a predefined set of tasks for experimenting.

## Multiuser mode (database server)

---

If you are going to share tasks with someone do not try to share data file and/or Portable Kanban folder over the network, it won't work. The only possible way is using Redis database server (<http://redis.io/>). Redis is freeware lightweight database server that can be installed from <https://github.com/MicrosoftArchive/redis/releases/latest> (version 3.0.504 is recommended) or from <http://redis.io/download> for Linux machines (or virtual machines running on Windows, including the latest Windows Subsystem for Linux available in Windows 10). There is no need to use a dedicated server within the office, in fact any machine can act as a server (just should be always powered on).

Portable Kanban uses only basic features of Redis on Windows, in fact there is no need to use the very latest version which are currently available only for Linux. To install Redis on Windows machine download using link above and start installation package (Redis-x64-3.0.504.msi), administrator's privileges are required. Note that it supports x64 systems only. Then just follow screen instructions:



Default installation package of Redis on Windows automatically installs server as a windows service, so there is no need to start it manually. But I would recommend adjusting some server settings after installation. Windows version of Redis stores all the settings within 'redis.windows-service.conf' file (in the folder where it is installed), all the settings are documented within the file. The following ones should be uncommented (remove # sign in front) and changed to avoid data losses and provide better security and fault tolerance:

Section	Setting	Default value	Value
SNAPSHOTTING	dir	./	<Actual path for database dumps>
APPEND ONLY MODE	Appendonly	No	yes

APPEND ONLY MODE	Appendfsync	Everysec	always
SECURITY	requirepass	Foobared	<Password> This is mandatory setting!

The service has to be restarted after changing settings.

There are also more options for installing Redis server on Windows machines:  
<https://github.com/ServiceStack/redis-windows>.

Alternatively, if you don't want to install the server in the office or have distributed team then you can try to use any of hosted services, e.g.:

Redislabs (<https://redislabs.com/redis-cloud>);  
 Microsoft Azure Redis Cache (<https://azure.microsoft.com/en-us/services/cache/>);  
 OpenRedis (<https://openredis.com/>).

Note that most of online Redis providers do not offer data persistence by default at least in free plans. You have to switch to paid plans to avoid unexpected data loss. E.g. in case of Azure it is recommended to go for Premium tier and enable the Data Persistence.

Each copy of PortableKanban has to be also configured to use the same database server and some network shared folder for files that may be attached to tasks. Path should be like "\\server\path\to\files" or "X:\path\to\files", where X is mapped drive letter (may be vary for different users). The same approach may be used if you're going to use cloud storage systems like Amazon Drive, Box Business, DropBox Bussiness, Google Drive, OneDrive for Business, ownCloud/NextCloud or similar for sharing files. Most of cloud storage system have desktop clients that can create the synchronized local folder with all the files copied to local disk. Note that you can't usually use personal cloud storage for simultaneous access by multiple users and have to switch to 'business' options. Some free systems like ownCloud or NextCloud do have this option: you can create a folder simultaneously shared and with multiple users. Another solution is using VPN to have access to files located on the office file server.

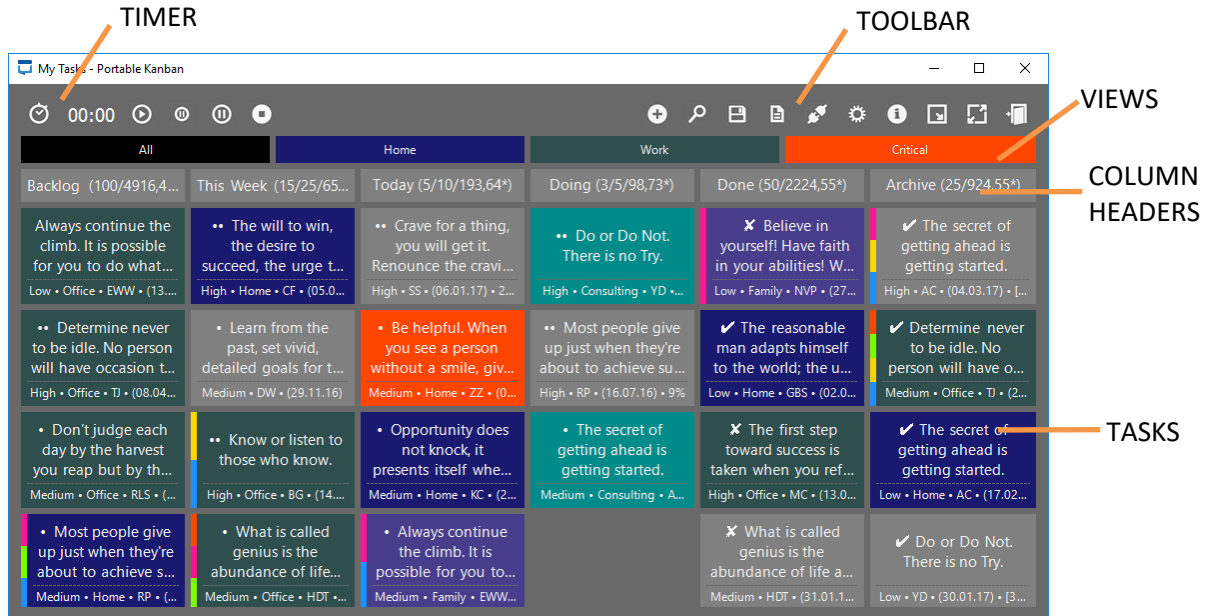
To complete installation in multiuser mode change the following settings (on every machine):

- 1) Setup/Data/Data source = Redis Database Server.
- 2) Setup/Data/Primary server = host name or ip address of primary/only server.
- 3) Setup/Data/Primary server port = primary/only server port number, default is 6379.
- 4) Setup/Data/Primary server password = password used to get access to primary/only server (the same for all the users, **blank password shouldn't be used**).
- 5) Setup/Data/Secondary server = host name or ip address of optional secondary server. Keep it blank if secondary server is not used.
- 6) Setup/Data/Secondary server port = secondary server port number, default is 6379.
- 7) Setup/Data/Secondary server password = password used to get access to secondary server (the same for all the users, **blank password shouldn't be used**).
- 8) Setup/Data/Index = 0 (usually 0, but it depends on Redis configuration: by default, server supports up to 16 databases, but this count may be changed thru configuration settings). Note that the single server may support multiple databases. You can create multiple kanban boards for multiple user groups still using the same server.

- 9) Setup/Data/Use SSL = False. By default, this option is turned off, but you can turn it on in case of using secure encrypted connections to the server if your provider supports this option. Note that Redis on Windows doesn't support this option.
- 10) Setup/Data/Update Interval – client will automatically fetch updates from the server every X minutes.
- 11) Setup/Data/Automatic Update – client will update view every time any task changed. In case of using time tracking feature and/or many users making a lot of updates it may be turned.
- 12) Setup/Miscellaneous/Files folder = network folder (see notes above).
- 13) Setup/Miscellaneous/Use relative path = No.

Tip: for multiuser configuration, it's recommended to configure one copy of Portable Kanban with all the desired settings, zip it and distribute to all the users (see "Create SFX" below). Advanced users may also create batch or shell scripts to automatically expand archive into users' personal folders, add shortcuts to desktop etc. Portable Kanban updates itself automatically by default, so further re-updating is not needed.

## User interface



### Timer

Timer has 2 modes: “Pomodoro timer” and “Current date & time”. Use the leftmost button to toggle modes. Pomodoro timer has 4 buttons: start working interval, short break, long break and stop. You can change default timer settings in Settings/Option/Timer section. If time tracking is enabled the same buttons are used to activate and deactivate the selected task. The currently active task will be highlighted.

In the second mode, the timer just shows current date and time. Format can be set in Setup/Board/Date/time format.

### Toolbar

Toolbars contains buttons for most used tasks:

- 1) Sync (refresh data, only in server mode)
- 2) Add new task
- 3) Save data
- 4) Create reports
- 5) Plugins
- 6) Settings
- 7) About
- 8) Minimize to tray
- 9) Toggle full screen mode
- 10) Exit

### Views

Views selector shows all the currently defined views. If there are no views defined this block is missing. Views selector is always occupying one line.

## Column headers

---

Column headers box shows defined columns. The set of columns may be varying for different views.

## Tasks

---

Tasks area displays task cards. Note that the board and column have no any scrollbars: this behavior by design. Use mouse wheel, cursor buttons or shortcuts to scroll tasks within every column.

Cards can be customized to show priority, task text and some additional information below the task text.

Context menus (right-click mouse actions) may be customized.

## Shortcuts

---

There are a lot of shortcuts defined for most of actions. Full list of shortcuts is available thru Info/Shortcuts.

Action	Shortcut	Mouse action
<b>View actions</b>		
Select next view	Ctrl + Tab	Click on tab
Select previous view	Shift + Ctrl + Tab	Click on tab
<b>Task actions</b>		
Insert a new task	Insert	Click "New Task", Double click on column header or empty space
Insert a new task with link	Drag & drop file/web link to any column. Use Ctrl and Alt keys to copy files or create shortcuts	
Insert a copy of the selected task (note: files won't be re-attached to a new task)	Shift + Insert	
Create a series of recurrent tasks	Shift + Alt + Insert	
Select a task	Arrows	Click it
Edit a task	Enter	Double click
Find a task	Ctrl + F	Click "Find"
Open task directory	Ctrl + O	Double click, select "Files" tab, then "Open" or "Explore"
Delete the selected task	Ctrl + Delete	Double click, then "Delete Task"
Copy task text to clipboard	Ctrl + C	
Create a report	Ctrl + P	Click "Report"
<b>Task movement</b>		
Move the selected task to the next column	Ctrl + Right Arrow	Drag & drop
Move the selected task to the previous column	Ctrl + Left Arrow	Drag & drop
Move the selected task up	Ctrl + Up Arrow	Drag & drop

Move the selected task down	Ctrl + Down Arrow	Drag & drop
Move the selected task to the top	Ctrl + Home	Drag & drop
Move the selected task to the bottom	Ctrl + End	Drag & drop
<b>Focus</b>		
Select column		Click on column header or any task
Move focus to the next column	Tab, Right Arrow	Click it
Move focus to the previous column	Shift + Tab, Left Arrow	Click it
<b>View</b>		
Scroll column content up or down	Arrows	Mouse Wheel
Minimize to the taskbar tray	F10	Click "Hide"
Toggle full screen mode	F11	Click "Full Screen"
View "Shortcuts & About" window	F1	Click "About"
<b>Data</b>		
Save data to the data file	Ctrl + S	Click "Save"
Exit & save data	Alt + F4	Click "Exit"
Sync tasks with server	F5	Click "Sync Tasks"
<b>Timer</b>		
Show/hide timer	Ctrl + T	Click "Timer/Date"
Start working	Shift + F1	Click "Work"
Activate the next task	Ctrl + F1	Ctrl + Click "Work"
Take a short break	Shift + F2	Click "Short Break"
Take a long break	Shift + F3	Click "Long Break"
Stop timer	Shift + F4	Click "Stop Timer"



## Setup

---

Portable Kanban is highly customizable, there is a lot of settings that allow you to change user interface the way is more comfortable for you. To change settings, click on 'Settings' button.

Settings shown in 'Options' tab may be individually adjusted by any user. All the other settings are only available for administrators. This means that board configuration (columns, views etc.) cannot be changed by 'ordinary' user, but UI may be different for every user still accessing the same data.

## Options

---

All the options are combined into several groups:

Group	Description
Data	Settings related to data source: local file or database server. Note that if data source is changed the program will be restarted.
Board	Common settings related to the board itself.
Views	Settings related to view selector.
Headers	Settings related to column headers.
Tasks	Settings related to task cards, default values.
Task Info	Settings related to task information: single line of text below the task text.
Task Tooltips	Settings related to task tooltips.
Timer	Settings related to timer and time tracking.
Alerts	Settings related to alerting users on task changes.
Miscellaneous	Logon and startup options, file folder settings, plugins' settings.

When selecting any setting a short description will appear in the bottom. While most of settings are self-explanatory, please, pay attention to these descriptions.

## Columns

---

Use 'Columns' tab to define or change the set of columns. Each column can be also customized and has the following parameters:

Parameter	Description
Name	Column name (e.g. "Backlog", "This Week", "Today", "Doing", "Done", "Archive").
Limit	Maximum count of tasks that may be placed in the column (also named WIP limit). Set '0' or blank if limit is not needed
Auto Complete	If checked off - a task moved to the column marked as completed
Reset Completed	If checked off - a task moved to the column marked as unfinished
Sort Order	Define sort order for each column, or manually place tasks in desired order.
Task Count	Current count of tasks in the column.
Clear Content	Check off to clear all the tasks in the column (use with care!).

Note that deleting column also means deleting all the contained tasks. Even if you re-create column with the same name as deleted one no tasks will be restored.

## Topics

---

Topics are optional, but very useful task parameter. Topics does allow to relate tasks to different projects, themes etc. Use 'Topics' tab to add, remove or edit topics. Note that deleting topics doesn't affect tasks; no any task will be deleted if it is related to deleted topic.

Parameter	Description
Name	Topic name (e.g. "Home", "Office").
Text Color & Background Color	Colors used for tasks related to the topic.
Default	Use the selected topic as default one for new tasks.
Inactive	Topic is inactive. It will not appear in selection lists anymore.

## Persons and Groups

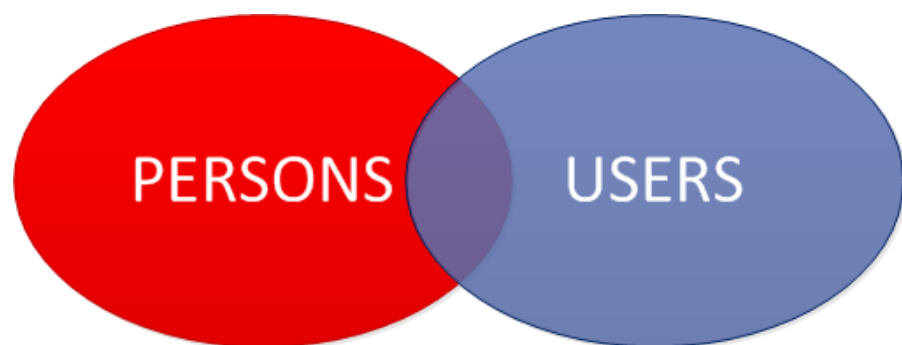
---

Before adding new persons and users there is a point to explain the difference between them.

Persons: anyone, who can execute task; tasks may be assigned to one person (recommended) or group. Persons can be also combined into groups. Persons are not necessary to be users of Portable Kanban: it can be some 3<sup>rd</sup> party persons/companies who may have no idea about Portable Kanban at all.

Users: anyone, who can access Portable Kanban.

In the simplest case these group match, but in many cases, they just overlap:



Use "Persons/Groups" tab to add, remove or edit persons and groups. Note that deleting some person doesn't affect assigned tasks; no any task will be deleted if it is assigned to deleted person.

Parameter	Description
Name & Initials	Person name & initials or group abbreviation.
E-mail	E-mail address to send notifications (alerts). Notifications will be sent to all the group members individually if there is no common e-mail address for the group.
Default	Use the selected person or group as a default assignee for new

	tasks.
Inactive	Person/group is inactive. Inactive person will not appear in selection lists anymore.
Group	Check off if this item is a group.
Group Members	Add/remove persons to the selected group.

You can synchronize list of persons/groups with list of users clicking on “Copy from Users” button in toolbar.

## Tags

One or many tags may be attached to any task. Tags will appear as thin colored lines on the left side of task card. Use “Tags” tab to add, remove or edit tags. Note that deleting some tag doesn’t affect related tasks; no any task will be deleted if it is related to deleted tag.

Parameter	Description
Name	Tag name.
Tag color	Color used for tags.
Default	Use the checked off tags as default ones for new tasks.
Inactive	Tag is inactive. It will not appear in selection lists anymore.

## Views

View is a subset of information filtered by columns, topics, persons, tags, priorities, deadlines and task status. There may plenty of combinations of these parameters that allow showing only the necessary part of information in every view. E.g. you can create views for every person, for one or more topics, for one or more tags. Views are more or less equivalent to swim lanes, but more flexible: the same task may appear in multiple views.

Use “Views” tab to add, remove or edit views.

Parameter	Description
Name	View name (e.g. "Work", "My Tasks" etc)
Text Color & Background Color	Colors used for tabs in view selector.
Inactive	View is inactive. It will not appear in selection lists anymore.
Data	Select columns, topics, persons and tags to be included into the view.

When configuring view please keep in mind the following rules:

- 1) Explicitly include some columns into view. If new column is created it won’t appear in any view until it’s added into the view.
- 2) Newly created topic won’t appear in any view unless it’s checked off or “Any topic” is checked off in view editor.
- 3) Newly created person/group won’t appear in any view unless it’s checked off or “Any person/group” is checked off in view editor.
- 4) Newly created tag won’t appear in any view unless it’s checked off or “Any tag” is checked off in view editor.

- 5) You don't need to check off all the group members to show tasks related to desired group, it's enough to check off the group only.
- 6) Personal view (for one person only) will show also tasks related to group which includes this person.
- 7) You can also include or exclude to/from the view tasks that have no topic, unassigned or untagged.
- 8) You can also filter tasks by priority (from Low to High), deadline and status.

Usually, if you don't see the newly created task in some view it means that some of task parameters are not included in the current view settings.

## Users

As it explained above Users are obviously users who should have access to Portable Kanban. Use "Users" tab to add, remove or edit users' information.

Parameter	Description
Name & initials	User name and initials.
E-mail	User's e-mail address.
Password	User password. New users have blank passwords by default.
Inactive	User is inactive. Inactive users cannot log in to the system.
Role	One of the following roles: Guest, User, Power User or Administrator

You can synchronize list of users with list of persons/groups clicking on 'Copy from Persons' button in toolbar.

Depending on the role users are allowed to do the following actions:

Action	Guests	Users	Power Users	Administrators
Create tasks	No	Yes	Yes	Yes
Edit/move tasks	No	Yes (except fields: "Assignee", "Priority", "Estimate", "Points" and "Created date" if edited task is not created by the user)	Yes	Yes
Delete tasks	No	No	Yes	Yes
Edit task comments	No	Yes	Yes	Yes
Edit time tracking data	No	No	Yes	Yes
Run plugins	No	No	Yes	Yes
Configure Portable Kanban	Options only	Options only	Options only	Yes

There is the only one default user: "Administrator" with blank password. It's recommended to change the administrator's password as soon as you start using Portable

Kanban with actual data. **There is practically no way to restore administrator's password if it is lost.**

## Custom fields

---

You may add custom fields of some pre-defined type to any task:

Parameter	Description
Name	Custom field name.
Type	Custom field type.
Default	Default value for custom field.
List values	List of values available for custom field of type "List".

## Operations

### Creating tasks

Click "New Task", double click on column header or empty space or push "Insert" button to create a new task and open "Edit task" dialog:

**Edit Task**

Task Files Comments Time Tracking

1. Task: Always continue the climb. It is possible for you to do whatever you choose, if you first get to know who you are and are willing to work with a power that is greater than ourselves to do it.

Cut Copy Paste Select All Subtasks H-Split V-Split Add Delete Up Down Top Bottom

2. Topic: Office 7. Estimate: 9.07:30 12. Tags: ☒ Critical ☐ Delegate ☐ Easy ☐ Help Required ☐ May be ignored

3. Column: Backlog 8. Progress, %: 0

4. Assigned to: Ella Wheeler Wilcox 9. Created: 13.12.2016 0:14

5. Priority: Low 10. Deadline: 05.03.2017 0:00

6. Points: 75,18 11. Completed: 05.03.2017 0:00

13. Field A: Judge each day not by the 15. Field C: Option 1

14. Field B: 8 16. Field D: 25.11.2018 0:14

Complete Task Cancel Task Delete Task OK Cancel

The current version of Portable Kanban has the following task parameters:

Parameter	Description
Task	Task text.
Subtasks	Subtasks may be used to list consecutive steps that have to be done to complete task, and/or may be used as a checklist where any subtask can be done in any order.
Topic	Topic (or none).
Assigned to	Assigned person, group or none.
Priority	Task priority: Low, Medium or High.
Points	Optional parameter used to estimate task complexity (often used in SCRUM methods).
Estimate	Estimated time required to complete task (in man/hours, format depends on settings: hours, calendar days, working days and user-defined units).
Progress	Current task progress.
Created	Creation date & time.
Deadline	Due date & time.
Completed	Completed or canceled date & time.
Tags	Tags related to the task.
Files	Files related to the task. File are stored in dedicated folders created automatically for every task.

Comments	Users' comments.
Time Tracking	Time tracking records (usually created automatically if time tracking feature is enabled).

## Editing tasks

---

Double click on the task or push "Enter" button to edit task. The same "Edit task" dialog will appear on the screen.

Tasks may be also moved between columns by drag & drop or shortcuts.

## Attaching files

---

Every task may have any count of attached files. All the files or shortcuts are stored in the task specific folder. If you need to attach the same file to several tasks you can create shortcuts instead of copying file many times. Note that files are not stored in the database but directly in the file storage; any changes made with files are immediate.

Note that files to be stored in dedicated folder that should be available to all the users. See "Settings/Miscellaneous/Files folder".

## Deleting tasks

---

Double click on the task or push "Ctrl + Delete" button to delete task. The same "Edit task" dialog will appear on the screen, then click "Delete task" and confirm deletion.

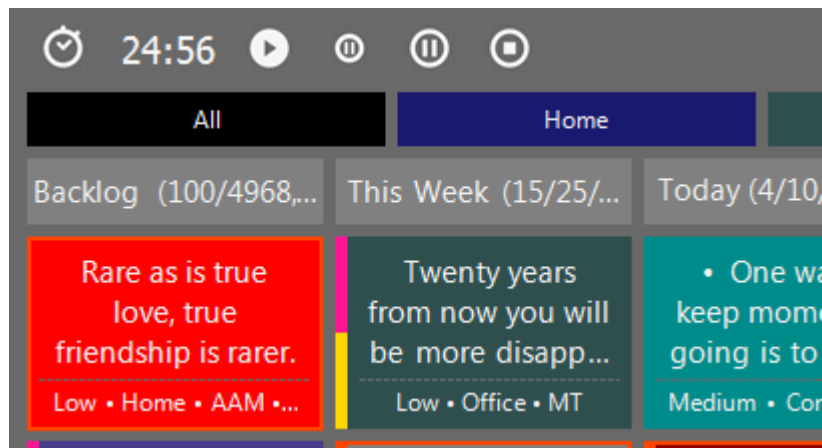
Note that deleting task is irreversible operation. Files related to the deleted task will not be deleted. It has to be done manually or using "Setup/Utilities/Clear file storage..." by administrator.

## Tracking time

---

Time tracking allows understanding how much time users spent on every task and comparing it with estimated value. You need to enable time tracking first: see "Setup/Options/Timer".

When tracking is enabled starting/stopping timer will add time tracking records to the activated task. To start tracking select some task, then click on "Work" (Shift + F1). When you finished with the task click on "Short break", "Long break" or "Stop" a new time tracking record will be added automatically to the task. You may also "jump" to another task without break and activate it by clicking Ctrl + "Work" (or Ctrl + F1).



Time tracking records are created automatically for every user working on the task. Power users may also edit these records while this is usually needed in rare cases (e.g. mistake). “Time tracking report” plugin may be used to print out reports for every user or topic to analyze productivity of users, topics (projects) that require more or less human resources etc.

## Reports

---

Click on “Report” button or Ctrl + P to create report. Report settings are similar to the current view settings but you can adjust anything. You can also include subtasks, comments and time tracking records into report.

## Importing tasks

---

There are 2 options for batch task importing form other sources:

- 1) From text file using “Quick Task Bar” plugin;
- 2) From CSV file using “Setup/Import”.

The latter case does allow not only bulk importing but also merging new task with existing data if ‘Merge data’ is checked off. New columns, persons, topics and tags will be added automatically. Format of CSV file should be exactly the same as used for exporting tasks.

## Exporting tasks

---

Use “Setup/Utilities/Export” tasks to save tasks in CSV file. Note that exported data doesn’t include task comments, time tracking records or user settings.

## Checking database

---

In rare cases data file (or database) may contain some errors; to avoid this problem it’s good idea to check database regularly. Checking database does allow also to decrease size of data file. Use “Setup/Utilities/Check database” to start checking.



## Backup & restore database

---

It's HIGHLY recommended to backup data. To create full backup of database, select "Setup/Utilities/Backup database". Backup file is complete copy of data including users, columns, views, persons and tags. You may set automatic backup at desired time.

Restoring database from backup file (Setup/Utilities/Restore database) will completely overwrite existing data.

Note that backup & restore may be used in both local and server modes. Backup/restore operations do not affect any files attached to tasks. Use built-in system tools or 3<sup>rd</sup> party programs for file backup.

Tip: to upgrade from local to server mode without losing data create backup of data, switch to server mode, then restore data from backup file. Attached files to be moved to shared folder.

## Distributing pre-configured packages

---

It is possible to create distribution package with all the pre-configured options. This option may be useful in workgroup environment. To create the package: configure PK, then save configuration. Re-open settings and create the package: Settings/Utilities/Create SFX. Ask users to double-click the package to install or re-install pre-configured PK on their PC.

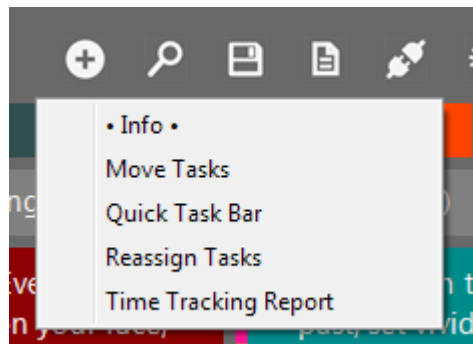
Note that the archive will include the last saved configuration file. It's recommended to turn off automatic logon, clear user name and password before creating distribution package.

## Plugins

---

Plugins are standalone libraries (DLL) developed to extend functionality of Portable Kanban. Plugins may directly access and manipulate existing data, so they have to be used with care. Only power users and administrators can run plugins.

To start plugin, click on 'Plugins' button and select desired one from the list:



## Installed plugins

---

The basic set contains following plugins:

- 1) Info: shows statistics about current data.
- 2) Move tasks: move completed tasks from one column to another (e.g. from 'Completed' to 'Archive').
- 3) Quick Task Bar: add tasks using simple command line interface.
- 4) Reassign tasks: change assignees for some tasks.
- 5) Time Tracking Report: prepare time tracking reports. There are 2 options for reports to show time spent by every user for every task or to show time spent for every topic.

### *Developing plugins*

---

The distribution zip file doesn't contain any SDK. But if you need to develop your own plugin you can download sample of plugin project from <http://dmitryivanov.net>. The sample project contains sources of all the installed plugins. The source code is self-documenting.

Developing specific plugins is also available upon request.

## Support

---

### Feedback

---

You can send your feedback by e-mail: click on About/Feedback. You can also share your problems, thoughts and ideas on <http://dmitryivanov.net>.

### Support & donations

---

Support is available for free by e-mail or on <http://dmitryivanov.net>. Response time is not limited, but usually reasonable.

Despite the fact that Portable Kanban is freeware, developing it required significant amount of time. There are many ways to support development:

- 1) Share your ideas on improving Portable Kanban on <http://dmitryivanov.net>.
- 2) Spread some information about Portable Kanban to friends, colleagues, in social networks, tweets and personal blogs; share your experience with other users.
- 3) Consider some [donation](#).

### Q&A

---

Q: I forgot my password and can't log in anymore.

A: Default login is 'Administrator' and blank password. If it doesn't help install Portable Kanban anew in another folder and try to restore data from backup file.

Q: Does it require internet connection?

A: Only for automatic upgrades. It can perfectly work without internet connection in local mode and in server mode when Redis server is installed within the local network.

Q: How to delete demo data and start from the scratch?

A: Delete pk3 and pk3.bak files. Data will be lost.

Q: I do not see any scrollbars.

A: It's by design. Use mouse wheel & cursor buttons (see "Shortcuts").

Q: I would like to use Portable Kanban at home and in the office and keep it in Dropbox.

A: You can do it, but not simultaneously. While Portable Kanban is running data file is locked, so you need to exit it when leaving home or office. You can also set following option: 'Setup/Options/Exit on power down' to close it every time you turn off your computers.

Q: I would like to put Portable Kanban on Dropbox and use it with my colleagues.

A: Switch to server mode, see "Backup & restore database".

Q: I moved Portable Kanban folder to another machine and cannot start it anymore. Every time I try to start it I see the message: "Data file is locked by another instance of Portable Kanban".

A: Remove .lock file.

Q: I would like to inform my colleagues when new task is assigned.

A: Look into Setup/Options/Alerts settings section.

Q: I do not see the task I've just created.

A: Check the current view settings: Setup/Views/Edit view.

Q: I need to create a copy of task.

A: Select it, then click Shift + Insert. Note that files attached to the original task won't be attached to new one.

Q: I would like to add one more field XYZ to tasks.

A: Fields are hard-coded; consider some workaround like using task text, subtasks or comments. New versions may include new fields, but it rarely happens.

Q: How to update to new versions.

A: If 'Setup/Options/Check for update' is enabled then Portable Kanban can upgrade itself automatically on startup. You can also check for updates clicking "About/Check for updates" link. You can also just download it and expand files to the same folder: data and settings won't be lost.

Q: I need to create specific report and/or exchange data with other task management system.

A: Consider developing or ask for developing a special plugin.

Q: Main window changes position or comes out of the view every time the program restarted.

A: Set "Setup/Option/Miscellaneous/Restore windows" to False.

Q: My board seems too complicated; there are too many columns, tasks etc.

A: Consider creating more views.

Q: We use it with Redis, Portable Kanban freezes too often.

A: If you use time tracking feature ("Enable time tracking" = True) try to set "Automatic update" to False. It should help.

Q: Portable Kanban doesn't save changes in settings.

A: Upgrade the installed NET Framework, should be 4.2.6 at least or newer.

Q: I would like to quickly change assignee or priority without editing task.

A: Look at 'Setup/Options/Board/Right click actions'.

Q: I need to create multiple independent boards.

A: Copy Portable Kanban to different folders, each copy may have own settings. In server mode, you can use different databases (#0-15); if 16 databases are not enough the count may be increased in server settings.

Q: I cannot connect to web-hosted Redis server.

A: Check firewall settings, Redis port number specifically.

Q: Can I use any other database server like MySQL, SQL Server etc?

A: Currently it works only with Redis server.

Q: Is there mobile, Mac OS or Linux version? Versions in other languages?

A: No. Windows & English only. Try to use Parallels or Wine.

Q: I have asked for specific feature but it is not still implemented.

A: There is no any warranty that all the requested features will be ever implemented.

Q: Are there any plans to open source of application.

A: Currently I don't have such plans.

## Changes

---

Change	Version
This is the final version; no more updates are planned. Automatic update is disabled.	4.3.6578.38136
Control external applications (e.g. start & stop music player) on starting work, pauses and stop. See Setup/Options/Timer/Execute on...	4.3.6566.1438
Time tracking is deactivated when task gets completed. User can activate the next task (Shift+F1) without restarting timer.	4.3.6566.1438
Task comments can be sorted in ascending or descending order.	4.3.6566.1438
Data files are checked for integrity on startup.	4.3.6566.1438
Fixed: all the passwords may be reset when upgrading to version 4.3.6539.38802.	4.3.6540.40984
Update: columns are limited to the current view in "Edit task" dialog, but this may be turned off – Setup/Options/Tasks/Select any column.	4.3.6540.40984
Passwords are hidden by default in Setup/Users tab.	4.3.6539.38802
Fixed: if subtask is checked off as done and moved immediately check mark doesn't move.	4.3.6539.38802
If directory for attached files is missing user can select or create new one without changing settings.	4.3.6539.38802
Columns are limited to the current view in "Edit task" dialog.	4.3.6539.38802
Users have to re-enter e-mail sender password due internal changes.	4.3.6539.38802
Fixed: issue with copying files during "Paste" operation.	4.3.6530.2347
Fixed: issue with changing font size in "Edit task" dialog.	4.3.6527.40726
Fixed: formatted text may appear in text field of "Edit task" dialog.	4.3.6526.39492
Fixed: error appears when creating a copy of existing task having no attached files.	4.3.6526.39492
New "smart sort" algorithm for sorting tasks within columns based on fuzzy logic.	4.3.6517.42395
New option for batch creating recurrent task. Use Shift + Alt + Insert or context menu for creating recurrent tasks.	4.3.6517.42395
PK now may popup on top of other windows when timer elapsed: Setup/Options/Timer/Activate window.	4.3.6517.42395
When creating a copy of existing task all the attached files will be copied to a folder for new task.	4.3.6517.42395
Fixed problem with incorrect icons in Edit Task/Files.	4.3.6517.42395
Fixed problem with copying folders (incorrect path).	4.3.6517.42395
Parsing e-mail content may be turned on/off, is on by default.	4.3.6517.42395
E-mail messages are parsed when dropped to PK, including attachments (experimental). Original e-mail message is also attached to task.	4.3.6458.33916
Task editor supports links and allows to change font size.	4.3.6458.33916
Subtasks are included into context menu.	4.3.6458.33916
Issue with wrong icons in file view is fixed.	4.3.6458.33916
Slack support is abandoned.	4.3.6458.33916
"Edit task" dialog may not react on Esc key ("Block Esc key" option)	4.2.6393.39784
Custom fields may be shown in task info and tooltip.	4.2.6359.39866
True/False values in Setup replaced to more readable Yes/No.	4.2.6338.32365

Small issue with editing time tracking records is fixed.	4.2.6338.32365
Issue with splitter positioning in "Edit task" is fixed.	4.2.6338.32365
Fixed issue with backup & restore custom fields.	4.2.6304.37719
Relative path to files directory may be used instead of absolute one.	4.2.6294.39037
Drag&Drop operation may be configured to add one task for every dropped file or one task for all the dropped files.	4.2.6287.29115
Confirmation when deleting files may be turned off.	4.2.6287.29115
Issue with adding new items in Setup dialog (Add button) is fixed.	4.2.6287.29115
Search within custom fields.	4.2.6287.29115
Configurable format for time-related fields added (Estimate/Spent): hours, calendar or working days, user-defined units.	4.2.6273.2450
Improved speed of backup/restore operations to/from local file.	4.2.6273.2450
Window positioning bugs fixed (some child windows could disappear on secondary monitors).	4.2.6273.2450
"Points" type changed to floating point value.	4.2.6273.2450
Tasks now may have custom (user-defined) fields	4.2.6273.2450
Columns, persons, tags etc should have unique name, error appears when editing if names are not unique.	4.2.6273.2450
Connections to Redis server with blank password are not supported anymore!	4.2.6256.39038
SSL support added	4.2.6256.39038
Connection to primary/secondary Redis servers added. Tested with Microsoft Azure Redis Cache.	4.2.6256.39038
New alerting option: using Slack messenger.	4.2.6238.34399
Clients may be enforced to update remotely (Setup/Options/Utilities/Update clients).	4.2.6238.34399
Views and reports settings: priorities may be Low to High or High to Low, tasks without deadlines may be selected.	4.2.6238.34399
'Copy link' option in context menu added to copy pk://... links only.	4.2.6238.34399
Multiple instances of PK may be started on startup.	4.2.6238.34399
'Edit task' window is always on top when file is dropped into PK window.	4.2.6238.34399
Path to files is checked before cleanup utility started.	4.2.6238.34399
Default drag&drop action may be specified: copy files, create shortcuts or none. If 'None' user have to use Ctrl+Drag&Drop to copy files or Alt+Drag&Drop to create shortcuts. See Setup/Options/Miscellaneous/Default drag&drop action.	4.2.6238.34399
Views now may be enabled or disabled for any user. To adjust view visibility use "Setup/Views/Edit view" and make changes in "Visible for users" column.	4.2.6212.25463
The program checks for required version of NET framework on start.	4.2.6212.25463
E-mail alerts may be sent on task completion, cancelation or re-assigning.	4.2.6212.25463
Automatic backup at desired time is implemented.	4.2.6212.25463
"Inactive" flags for topics, tags, persons, views and users.	4.2.6212.25463
Support for "pk://" protocol. Links to tasks may be passed as "pk://<id>". Use "Settings/Miscellaneous/Enable pk:// protocol" to share links to tasks within e-mail or other documents.	4.2.6212.25463
Every task now may have unlimited number of attached files stored in dedicated folders. Files may be copied into it or shortcuts/hyperlinks may be created instead.	4.2.6212.25463
Drag & drop operation now supports creation of shortcuts to files.	4.2.6212.25463
Small toolbar icons replaced to texts for better usability with hi-res displays	4.2.6212.25463
More options for context menu added	4.2.6212.25463
Import from CSV now support initials, not only full names	4.1.6135.41852
Context menu with a lot of options (Board/Right click action)	4.1.6135.41852
Fixed: no warning message appears if task has been remotely edited by another user	4.1.6122.42801
Fixed: problems with filtering by status/completion date in views and reports	4.1.6091.160
User role permissions are changed (see Users section above)	4.1.6084.41997

Fixed: MAPI issue on Windows 10 fixed	4.1.6084.41997
Fixed: PK is immediately restarted after backup to resolve conflicts with non-existing users	4.1.6066.41964
Improved reporting by 'completed/cancelled'	4.1.6066.41964
Fixed: autocomplete/reset completed flags automatically set when changing columns in Edit dialog	4.1.6066.41964
Fixed: Quick Task Bar correctly handles "!!" and "!!!"	4.1.6066.41964
New option: (re-)create icon on the desktop	4.1.6066.41964
Fixed: filed "Completed by" was not always updated	4.1.6037.37567
More filtering options in Views/Reports (Completed/Canceled dates)	4.1.6037.37567
Estimate and spent time are displayed as "Days.Hours:Minutes" in dialogs and reports.	4.1.6028.32234
Esc doesn't close "Edit Task" and "Setup" dialogs if data is being edited within grids (Subtasks and others).	4.1.6025.599
"Cleaning..." message won't appear anymore during automatic update.	4.1.6025.599
User manual added.	4.1.6016.42147
Fixed problems with QHD displays.	4.1.6007.35134
New plugin for quick re-assigning tasks.	4.1.6007.35134
Code is signed, no warning should appear anymore (hopefully).	4.1.xxx.xxx
Import/export to/from CSV files is back, imported data may be also merged.	4.1.xxx.xxx
Automatic update. See "Setup/Options/Misc/Check for update". This option is 'on' by default, but you can always turn it off and check for updates manually (About/Check for updates).	4.1.xxx.xxx
Some optimization in code and UI.	4.1.xxx.xxx
Now only power users and administrators may change deadlines.	4.1.xxx.xxx
Task assigned to group now shown in views filtered by person if person is a member of group.	4.1.xxx.xxx
Overdue tasks are visually highlighted.	4.1.xxx.xxx
Solved problems with e-mail notifications with Outlook.	4.1.xxx.xxx
Paste screenshots and attach them to tasks by single click (Edit task/Paste).	4.1.xxx.xxx
Quick sync Users and Persons.	4.1.xxx.xxx
More actions on mouse right click: move, open attachment, change priority, change assignee.	4.1.xxx.xxx
Restoring positions of windows on the screen may be turned off if needed.	4.1.xxx.xxx
Persons may be combined to groups, now task can be assigned to groups (finally!).	4.0.xxx.xxx
Improved e-mail notifications, now e-mails can be sent using MAPI or SMTP server.	4.0.xxx.xxx
Plugins API is changed to allow edit settings within "Settings" dialog. Existing custom plugins have to be rebuild.	4.0.xxx.xxx
New task fields: Created by/when, Modified by/when.	4.0.xxx.xxx
Simplified import/export from/to tab-delimited text files instead of CSV.	4.0.xxx.xxx
Fixed problem with custom colors.	4.0.xxx.xxx
Improved filtering in views and reports.	4.0.xxx.xxx
Locking data file to avoid data corruption when PK is located within shared folder/cloud storage.	4.0.xxx.xxx

## Licenses

---

Portable Kanban

Copyright © 2012-2017 Dmitry Ivanov <http://dmitryivanov.net>

All rights reserved.

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, subject to the following conditions:

The above copyright notice and this permission notice shall be included in all copies or substantial portions of the Software.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE COPYRIGHT OWNER OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

### 3rd Party Components

ServiceStack.Redis

Copyright (c) 2013 Service Stack

=====

This program is free software: you can redistribute it and/or modify it under the terms of the GNU Affero General Public License as published by the Free Software Foundation, either version 3 of the License, see <http://www.gnu.org/licenses/agpl-3.0.html>.

This program is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Affero General Public License for more details.

### FOSS License Exception

=====

This Exception applies to open source applications built with ServiceStack and ServiceStack extensions ("The Software"), and to open source Derivative Works of the Software, that use the Software under the terms of GNU Affero General Public License, version 3 ("AGPLv3"). The Exception extends AGPLv3 by providing additional grants that allows developers of FOSS applications to include ServiceStack with their FOSS applications in combination with other software licensed under



the licenses from the "Open Source License List" below, provided that:

You obey the AGPLv3 terms for the Software and the Derivative Work, except for the separate parts of the Derivative Work ("Additions") which constitute independent work and are not derived from the Software.

- All Additions are distributed subject to one of the licenses listed below.
- Your software distribution provides complete source code for the Additions.
- The Derivative Work and its Additions are intended for use in end-user applications and do not constitute software intended for use by software developers, such as software libraries, components, and development kits.
- If you violate any of the terms in this Exception, you lose all rights granted to you by the Exception and revert to the terms of AGPLv3.

Service Stack reserves all rights not expressly granted in these terms and conditions.

#### Open Source License List

Name	Version
Academic Free License	2.0
Apache Software License	2.0
Apple Public Source License	2.0
Artistic license	From Perl 5.8.0
BSD license	July 22 1999
Common Development and Distribution License (CDDL)	1.0
Common Public License	1.0
Eclipse Public License	1.0
Educational Community License	2.0
European Union Public License (EUPL)	1.1
GNU General Public License (GPL)	2.0
GNU Library or "Lesser" General Public License (LGPL)	3.0
Jabber Open Source License	1.0
MIT License (As listed in file MIT-License.txt)	-
Mozilla Public License (MPL)	1.0/1.1
Open Software License	2.0
OpenSSL license (with original SSLeay license)	2003 (1998)
University of Illinois/NCSA Open Source License	-
W3C License	2001
X11 License	2001
Zlib/libpng License	-

#### Commercial License

=====

In addition to this license, ServiceStack is offered under a commercial license.  
Contact team@servicestack.net for details.

#### DotNetZip Library

<https://dotnetzip.codeplex.com>

Microsoft Public License (MS-PL)

<http://www.opensource.org/licenses/MS-PL>

#### CsvHelper

Copyright (c) 2009-2015 Josh Close and Contributors

<http://csvhelper.com>

All rights reserved.

Dual licensed:

Microsoft Public License (MS-PL)

<http://www.opensource.org/licenses/MS-PL>

Apache License, Version 2.0

<http://opensource.org/licenses/Apache-2.0>

MSGReader

Copyright 2013-2017 Kees van Spelde

<https://github.com/Sicos1977/MSGReader>

Licensed under the The Code Project Open License (CPOL) 1.02

<http://www.codeproject.com/info/cpol10.aspx>