netgenium

Kanban

A control in an edit form

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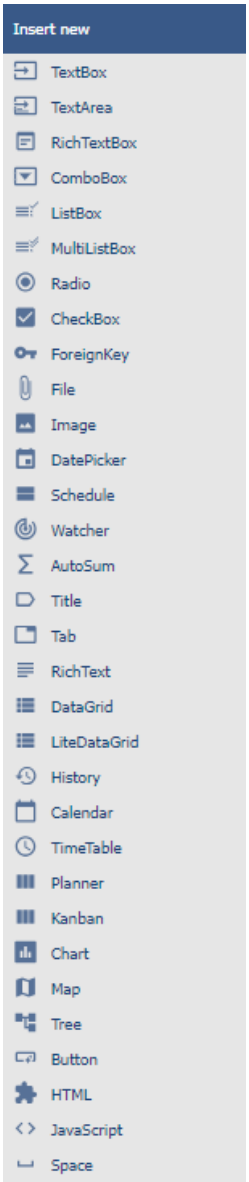
1 Basic information

1.1 Description of the control

Kanban is a multi-column (resource) visual board that displays events visualized in the form of cards.



1.2 Create a new control

A new kanban can be created as follows from the edit form using the toolbar with controls:

- First, the position in which the new kanban is to be placed is determined by clicking the mouse in the edit form. This will highlight the selected position with a gray horizontal line. Then just click on the “Kanban” item in the toolbar of the edit form, fill in the attributes of the new control in the newly opened dialog, and then save. This will insert a new kanban at the pre-selected location of the edit form.
- If the required position is not determined before inserting the new kanban, the new kanban will be inserted at the end of the edit form.

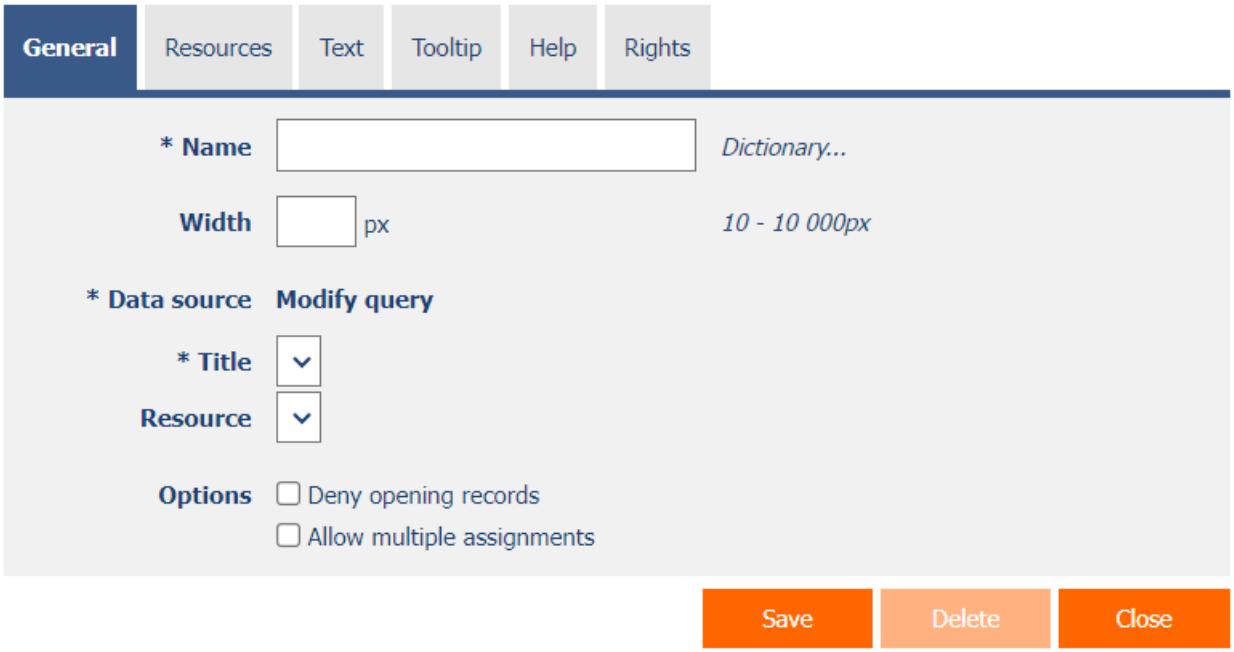
1.3 Editing or deleting a control

- For each existing control, a pencil icon appears on the left side of the edit form to change or delete the control's settings.
- Individual controls can be moved vertically in the edit form using the Drag&Drop method. Moving consists of grabbing the control, preferably behind its name located in the left column of the edit form, and then dragging it to the desired position in the edit form.
- For security reasons, it is important to have the function of moving controls enabled using the “Drag&Drop” check box located above the toolbar with controls. This field is unchecked each time you log in to the application.

2 A list of tabs in the control's settings dialog

General	Setting general properties
Resources	Setting the visual board's resources
Text	Setting the columns displayed on individual cards
Tooltip	Settings for columns displayed in details
Help	Help text settings
Right	Rights settings

2.1 "General" tab



2.1.1 Name

- The name of the control.

2.1.2 Dictionary

- The dictionary lists the names of other controls, forms, view pages, categories, applications, and application groups used across the entire application.
- The dictionary search is used to design the correct control name and to maintain the consistency of the nomenclature throughout the application so that controls with the same meaning located in different places in the application are named in the same way.

2.1.3 Width

- The width of the control, expressed in pixels.
- If you do not fill in this input field, the width of the visual board will be set to the maximum screen width.

2.1.4 Data source

- The data source defines the source database records displayed in the visual board.
- Data source settings are made in the graphical designer of database queries. A detailed description of the database query designer is provided in the separate "Database Query Designer" guide.

2.1.5 Title

- Select a column that specifies the title of the event on the visual board.

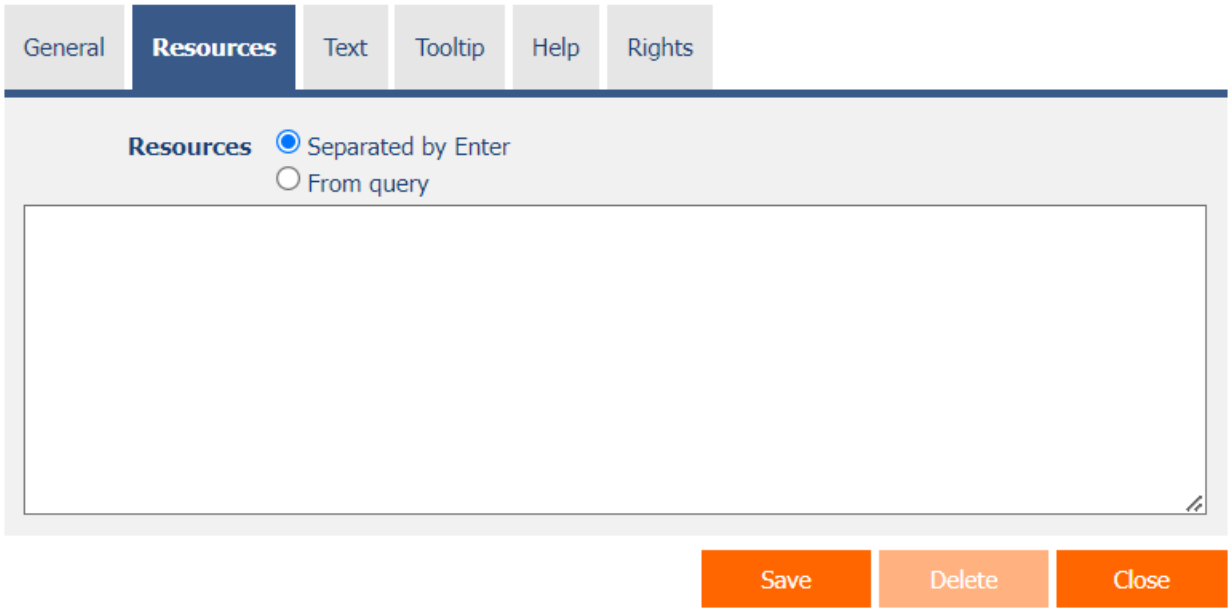
2.1.6 Resource

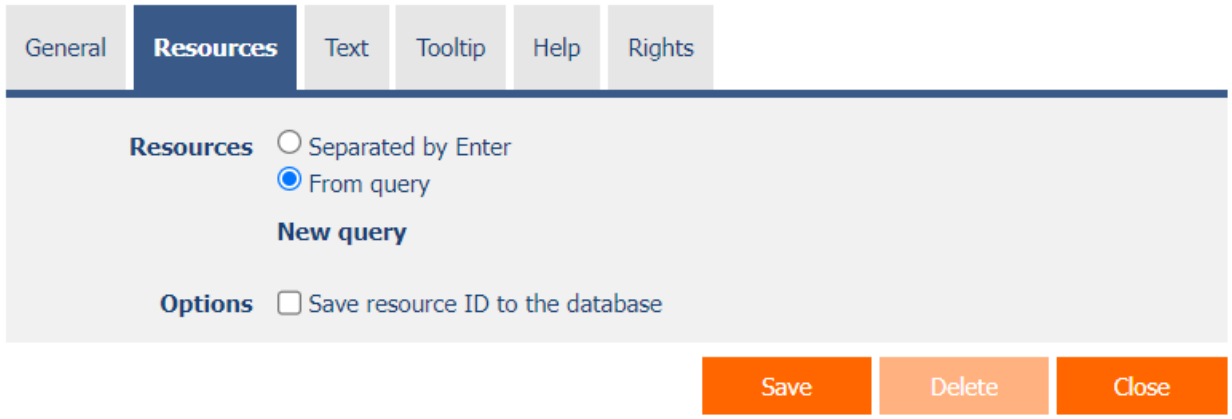
- Select a column that specifies the source of the event on the visual board.
- Resources are displayed as individual columns of the visual board.

2.1.7 Options

- **Deny opening records**
  - Checking this box determines whether all users should be denied access to the edit form in order to open the displayed database record by clicking on the tab title on the visual board.
- **Allow multiple assignments**
  - Checking this box determines whether a text box or a drop-down list with the selected value should be displayed in the visual board instead of the control value itself, with the option to change the value without having to open and edit the record in the edit form.
    - This function is applied only to controls that have the “Allow multiple assignments” check box selected on the “General” tab.
    - Multiple assignments can only be made by a logged-in user, a text box or a read-only drop-down list is displayed to the anonymous user.

2.2 "Resources" tab





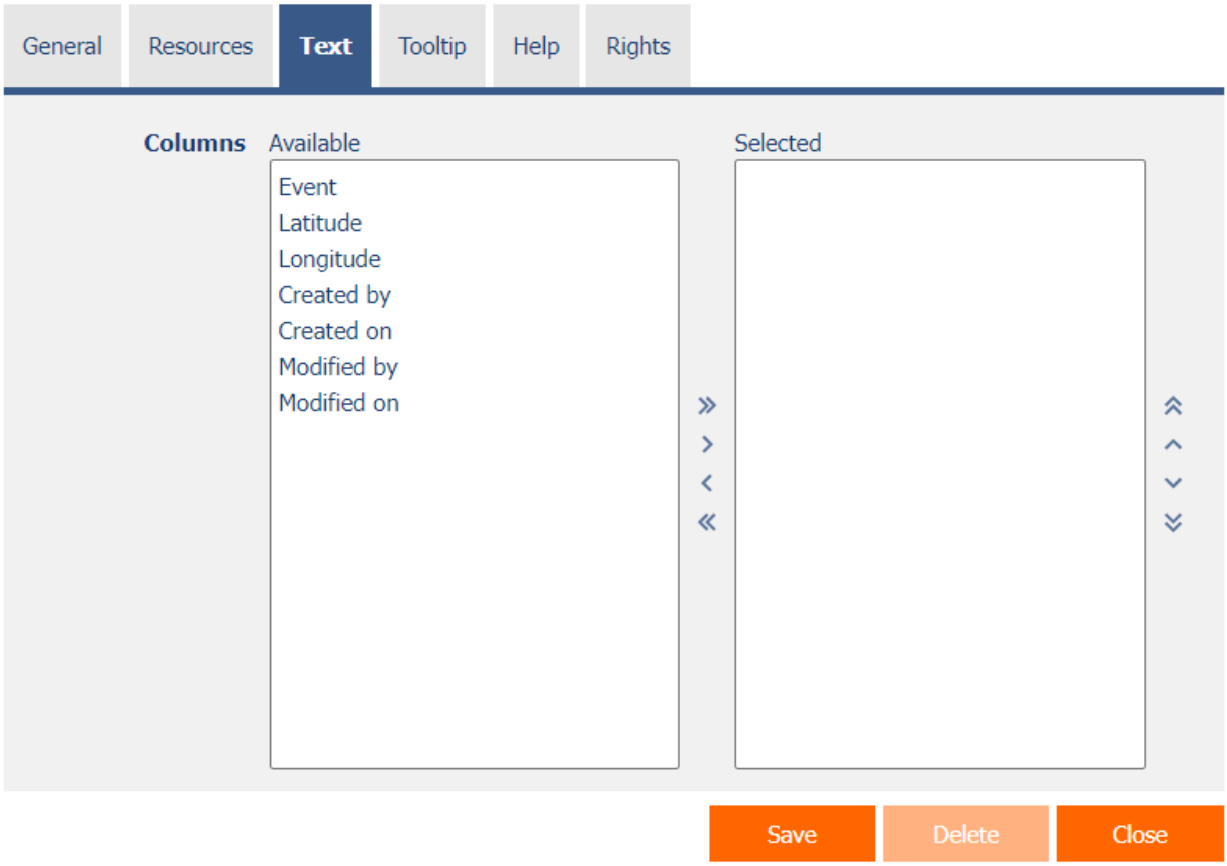
2.2.1 Resources

- Definition of resources that appear as individual columns of the visual board.
- The source radio button contains the following two types of source definition:
  - **Separated by Enter** – the list of resource values is set manually, in a text field using values separated by enter
  - **From the query** – the list of resources defines a database query, which is evaluated when opening or updating the edit form

2.2.2 Save the resource ID to the database

- Checking this box determines whether the database event records have a foreign key value stored in the resource value that references the primary key of the resource.

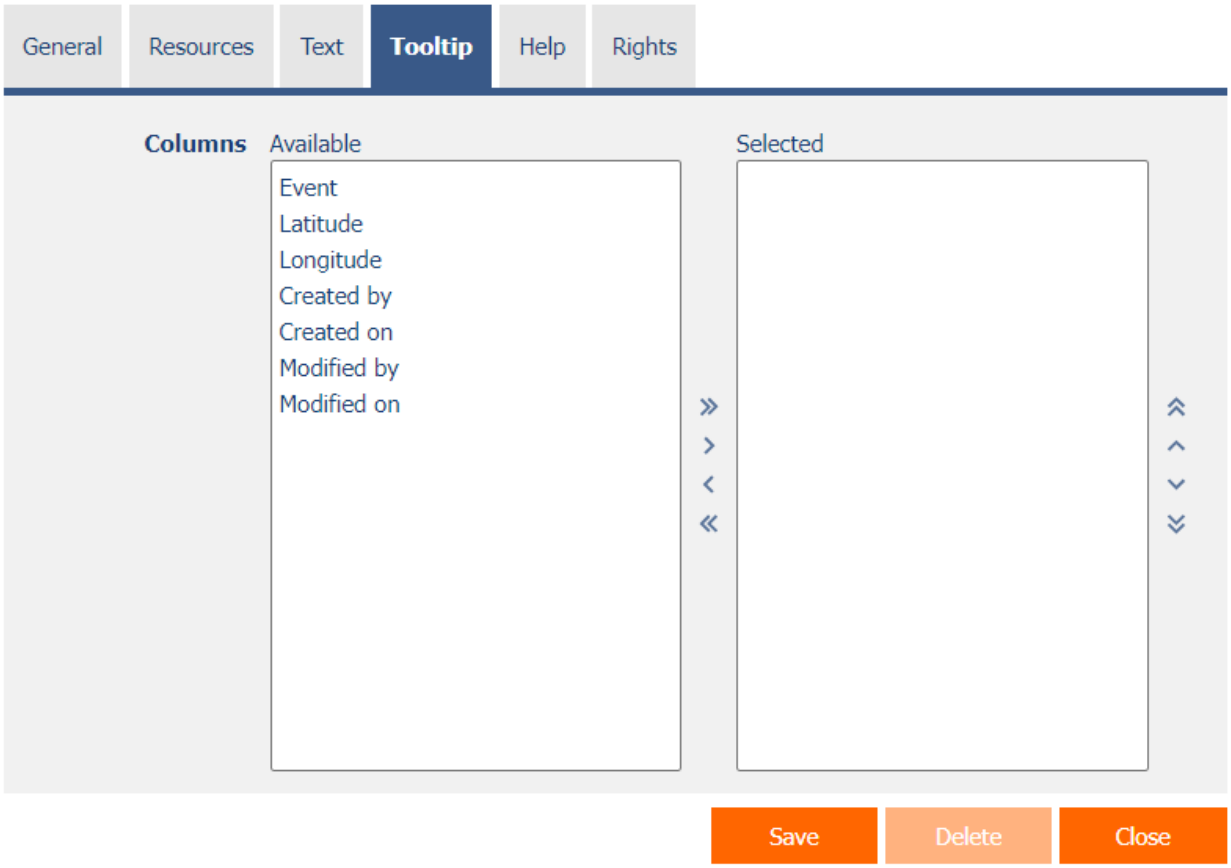
2.3 “Text” tab



2.3.1 Columns

- Definition of the columns displayed in the visual board tab event text box.

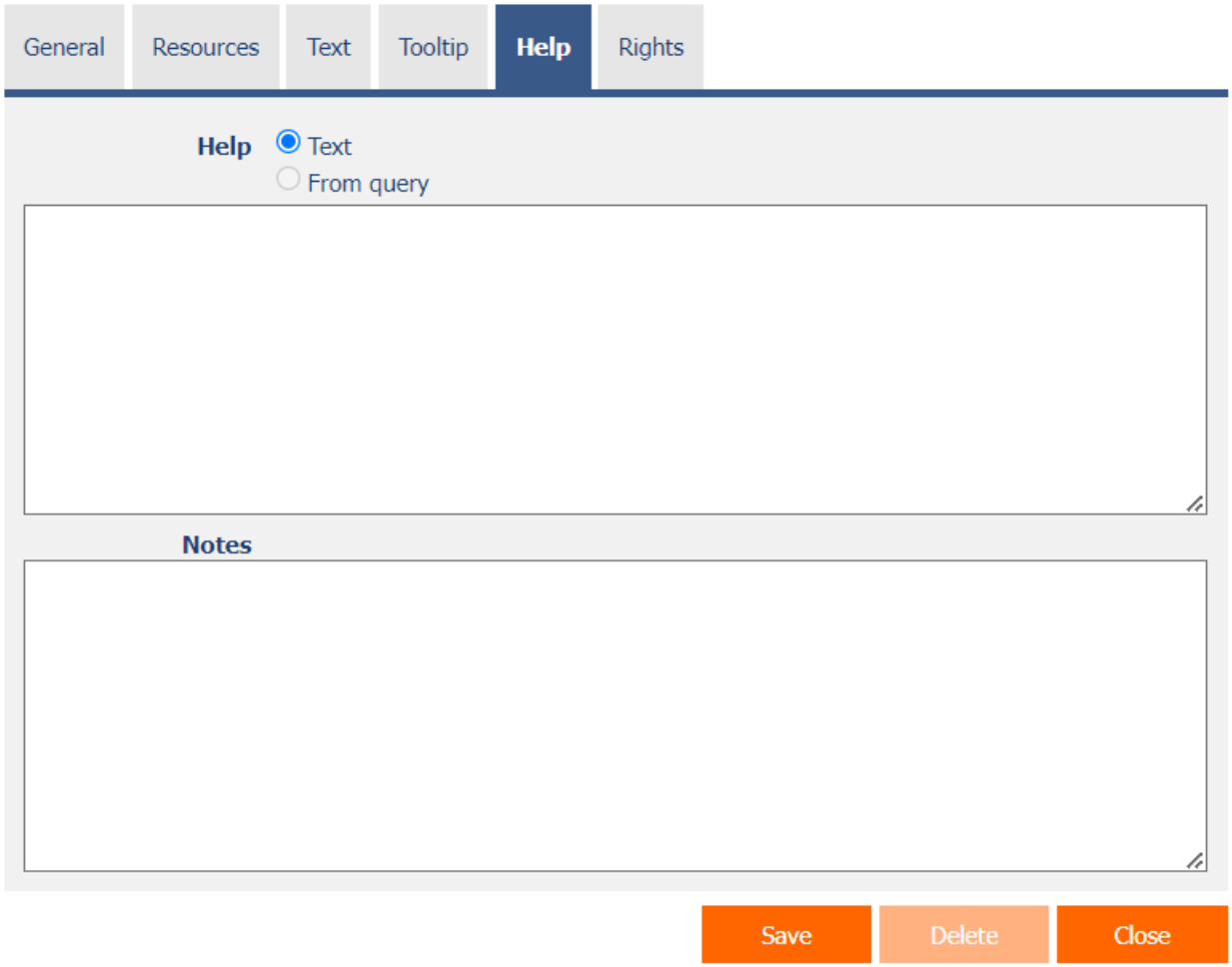
2.4 “Tooltip” tab



2.4.1 Columns

- Definition of the columns of details displayed when hovering the mouse over a visual board event.

2.5 “Help” tab



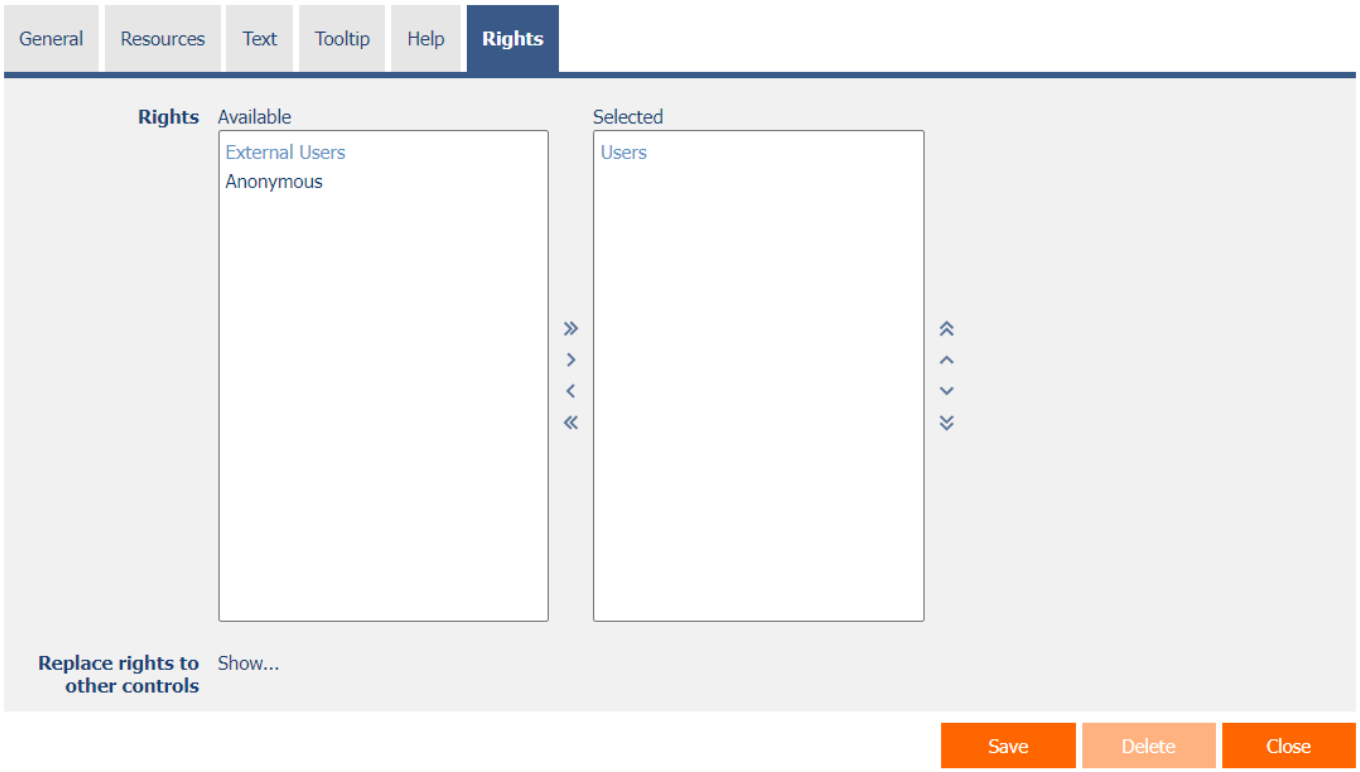
2.5.1 Help

- Help is the text displayed in the tooltip after clicking on the question mark icon, which is located in the header of the visual board.
- Help text supports simple text formatting using wiki syntax:
  - '''Bold text'''
  - ''Italics''
  - '''''Bold italics'''''
  - ""Text enclosed in double quotes""
  - Lists:
    - * Heading 1
    - ** Subheading 1.1
    - ** Subheading 1.2
    - * Heading 2
    - * Heading 3

  - # Numbered heading 1
  - ## Numbered subheading 1.1
  - ## Numbered subheading 1.2
  - # Numbered heading 2
  - # Numbered heading 3

- The help radio button contains the following two types of help definition:
  - **Text** – help text defines a manually entered text string placed in a multi-line text field below the radio button
  - **From query** – the help text defines the result of the database query, which is evaluated when opening the edit form

2.6 “Rights” tab



2.6.1 Rights

- Rights define a list of user groups and users who have permission to view the control on the edit form.

2.6.2 Replace rights to other controls

- The “Replace rights to other controls” function is used to unify the rights within the entire edit form for controls that are related in terms of rights.
- Thanks to the “Show…” link, it is possible to display a list of all controls in the edit form, including setting the rights of these controls. For each control, a check box is displayed that allows you to select the control. When you save a control, the same rights are then set for those selected controls.
- An alternative for unifying rights within the entire edit form is to display the report available from the “Subordinate object rights” tab in the edit form settings.