Kanban

Control on the view page

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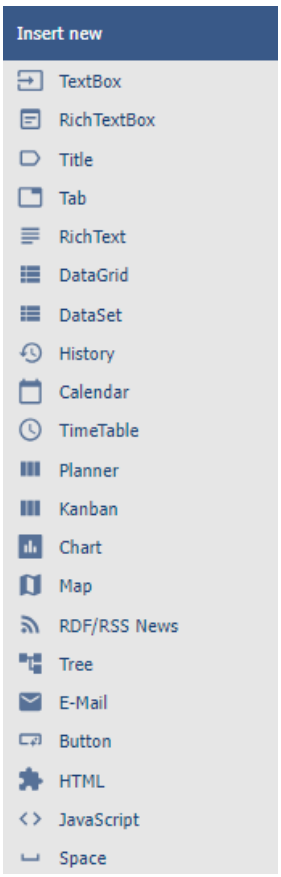
1 Basic information

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 view page using the toolbar with controls:

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

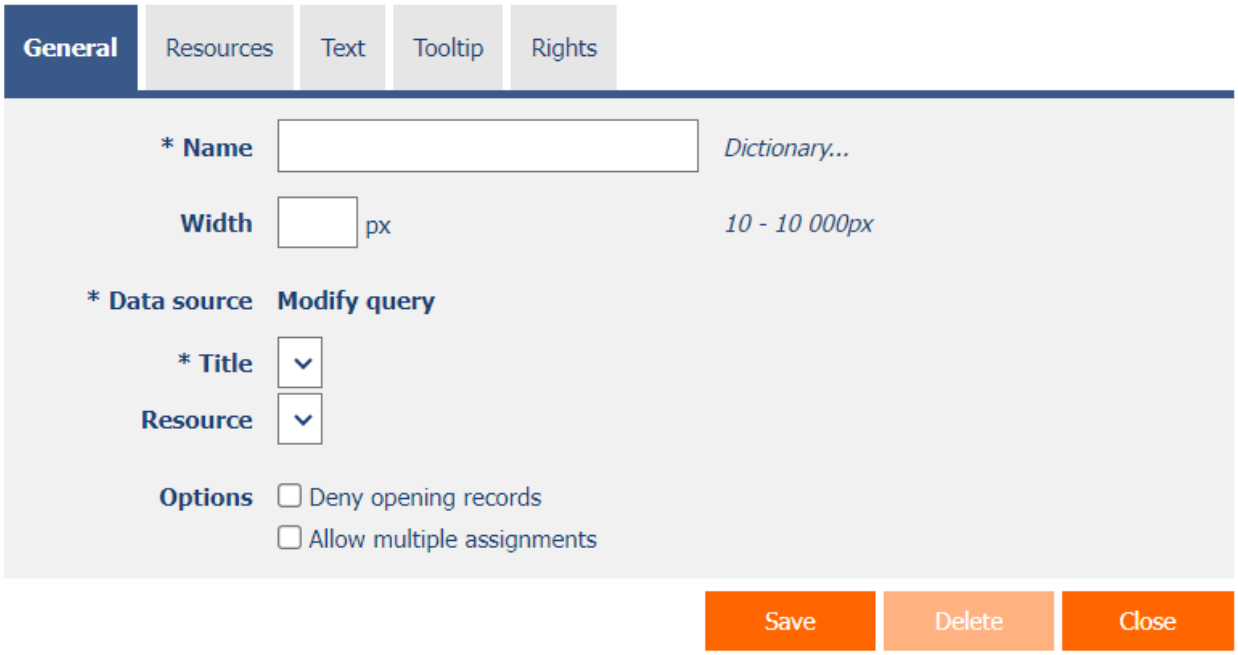
1.3 Edit or delete a control

- For each existing control, a pencil icon appears to the left of the control page to change or delete the control's settings.
- Individual controls can be moved vertically on the view page using the Drag&Drop method. Moving consists of grabbing the control, preferably behind its name, and then dragging it to the desired location on the view page.
- 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 List of tabs in the control 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
Rights	Rights settings
Administration	Setting other properties

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.

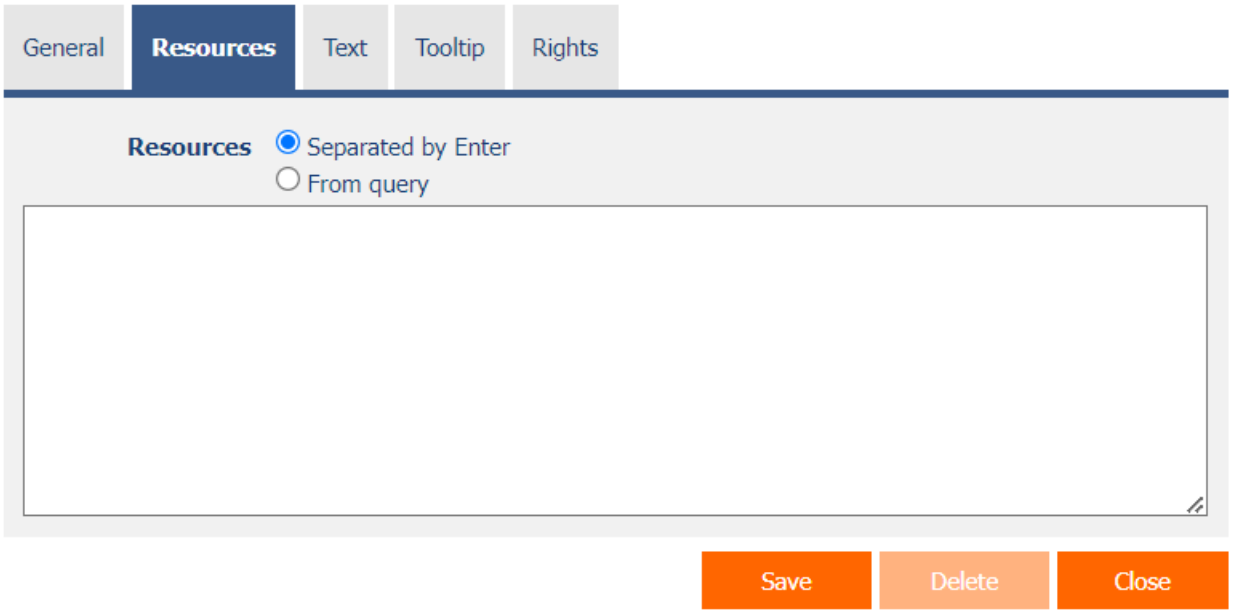
2.1.6 Resource

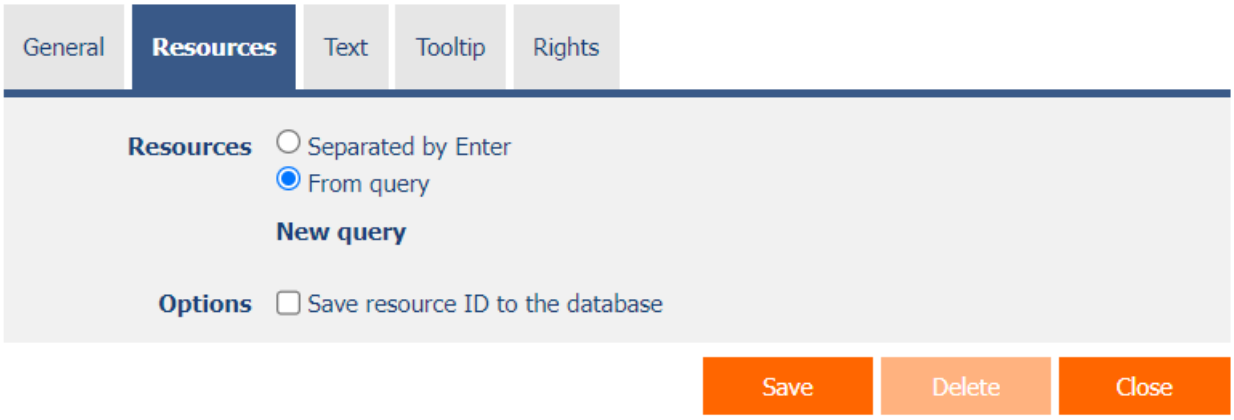
- Select a column that specifies the source of the event on the visual board.
- Resources are displayed as individual columns of the visual board.

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.
    - Bulk changes can only be made by a logged-in user, a text box or a read-only drop-down list is displayed to an anonymous user.

2.2 "Resources" tab





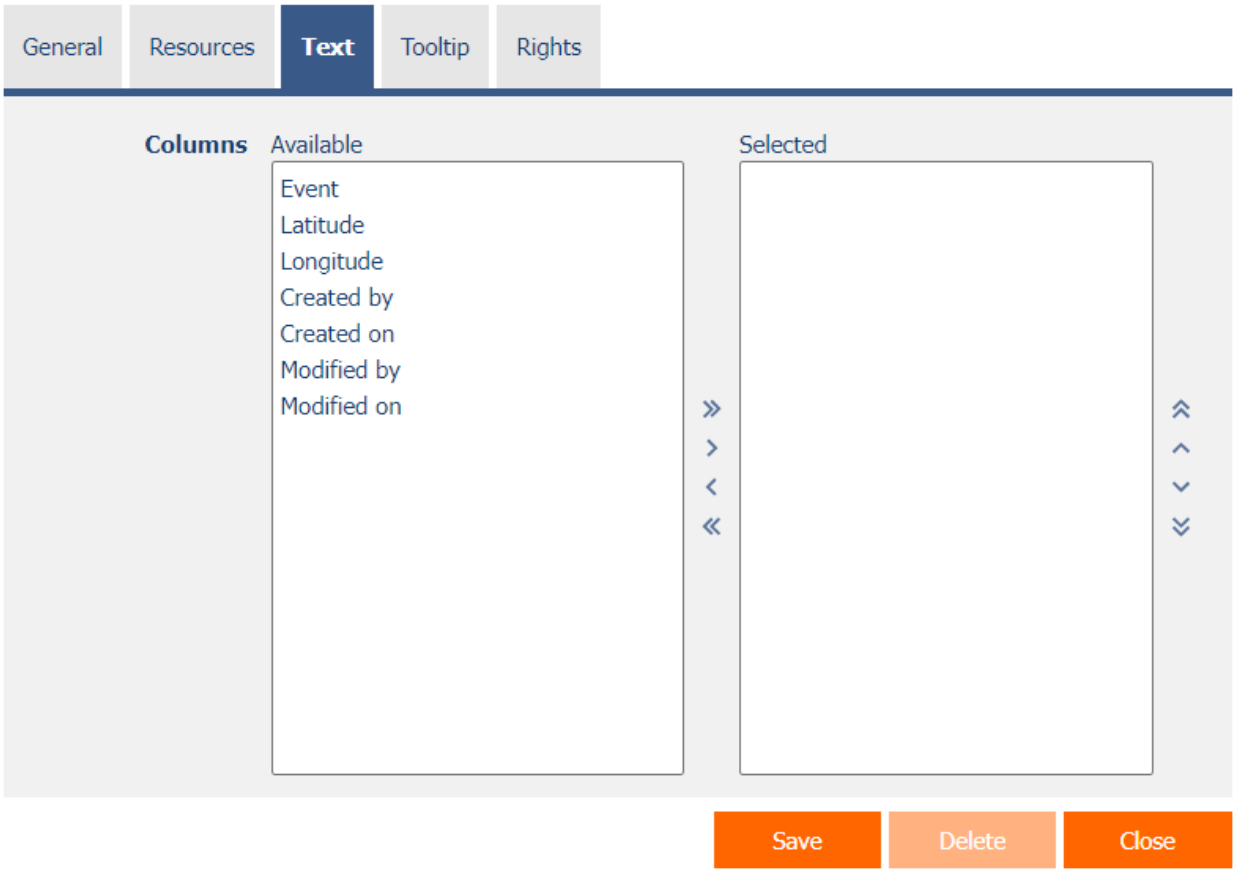
2.2.1 Resources

- 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 source values is set manually, in the text field using values separated by enter
  - **From query** – the list of resources defines a database query, which is evaluated when opening or updating the view page

2.2.2 Save 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.

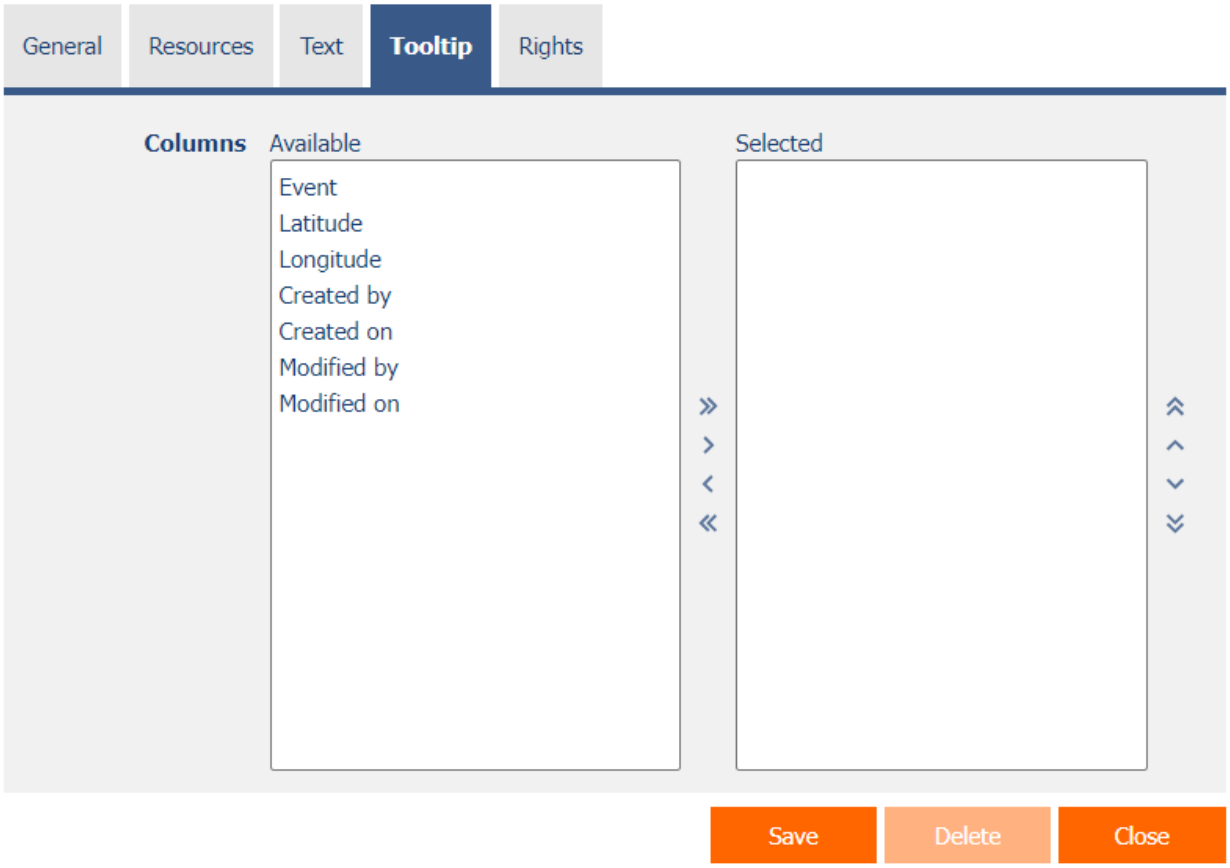
2.3 “Text” tab



2.3.1 Columns

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

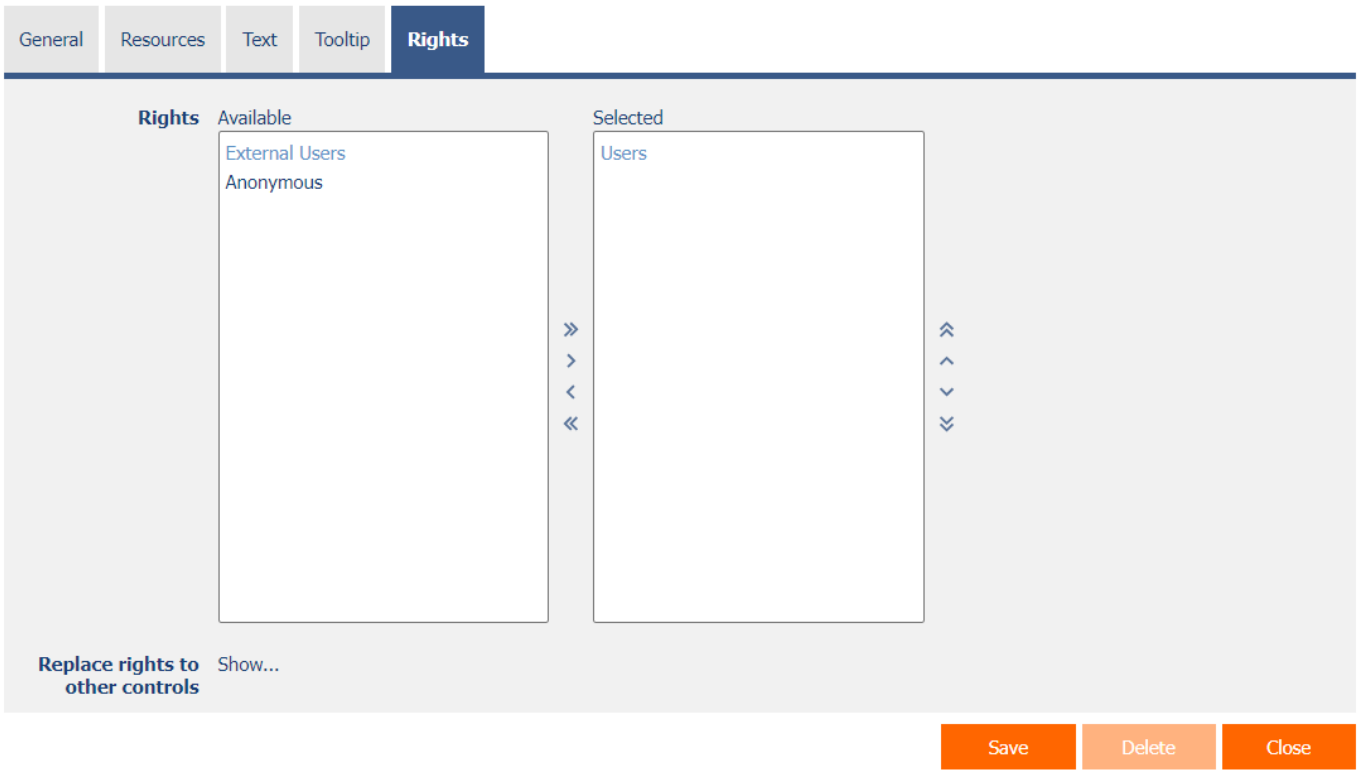
2.4 “Tooltip” tab



2.4.1 Columns

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

2.5 “Rights” tab



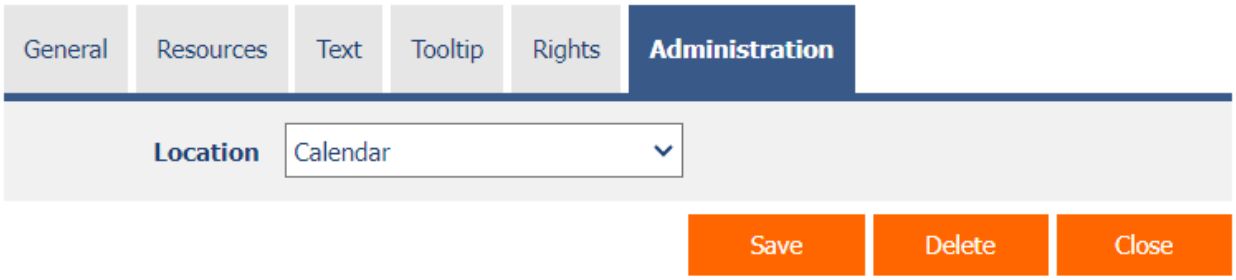
2.5.1 Rights

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

2.5.2 Replace rights to other controls

- The “Replace rights to other controls” feature is used to unify rights across the entire view page for controls that are related in terms of rights.
- Thanks to the “Show…” link, it is possible to display a list of all controls on the view page, including the setting of 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 view page is to display the report available from the “Subordinate object rights” tab in the view page settings.

2.6 “Administration” tab



- The “Administration” tab is only displayed for existing controls.

2.6.1 Location

- Select the view page on which the control is located.
- The drop-down list contains all view pages located in the same application.