Kanban

Guides for Merlin Project

Kanban - as of November 2020

Note for Merlin Project Express users

The following functions are only available in Merlin Project.

This guide contains information about the Kanban system in Merlin Project.

Kanban is a Japanese term and has a wide range of meanings such as card, board or document.

What is Kanban?

Alongside Scrum, Kanban is one of the most widely used methods in project management.

It was originally developed for production management, meanwhile the agile method is now also used widely in project management.

The use of Kanban offers improved utilization, higher transparency, and faster iterations during the project.

Kanban principle

The Kanban system is based on cards that can be moved from left to right in column rows along a board.

Every to do is noted on a card. Depending on the processing status, a card moves along the board from left to right until it is completed.
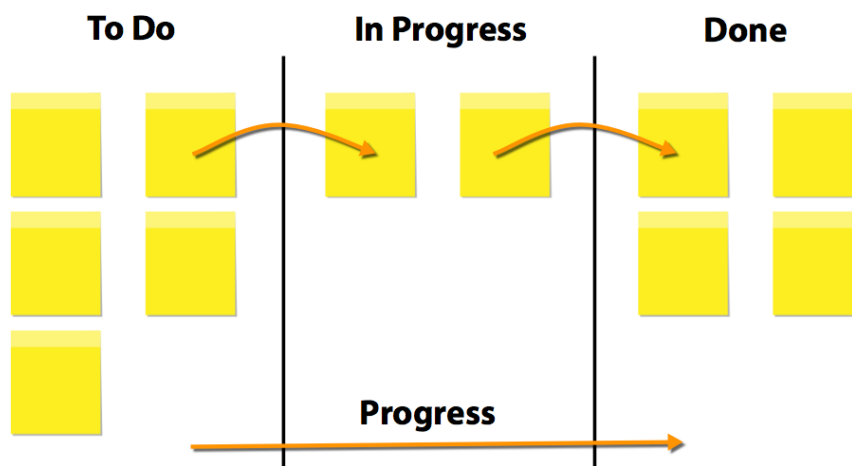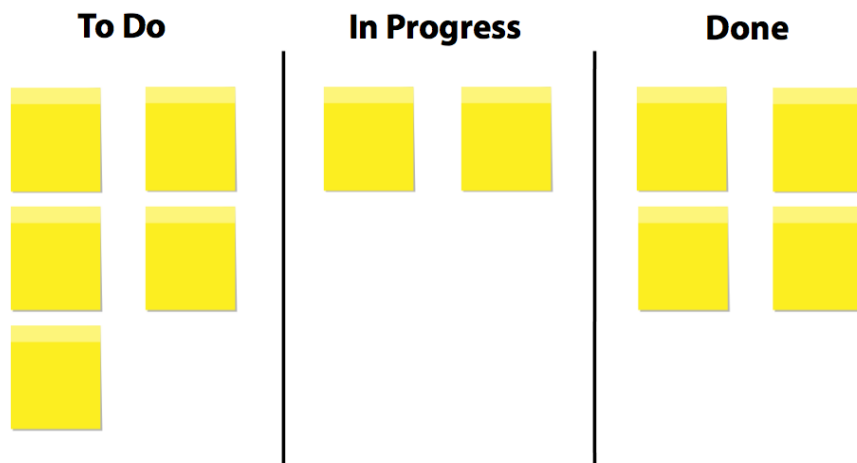

In moving along the columns, the cards are given a defined status. As the project progresses, an increasing number of cards move from left to right.

Columns in Kanban

In the simplest Kanban system, the Kanban board is split into three columns. The cards

always move from left to right.

To Do: In the left-hand column, to dos are entered that have not been worked on yet. These to dos are planned and are to be worked on soon.

In Progress/Doing: As soon as work starts on a to do, its card is moved to the center column. The card remains in this column while being worked on.

Done: Once the to do is done, the card moves to the right-hand column. This means that the to do has been completed successfully.

Kanban in Merlin Project

Merlin Project lets you plan using traditional and agile project management methods, and to switch between them or even use both simultaneously whenever you want.

The progress and thus the status between the traditional and agile planning method views is updated automatically. This unique function lets you work flexibly and plan using different methods.
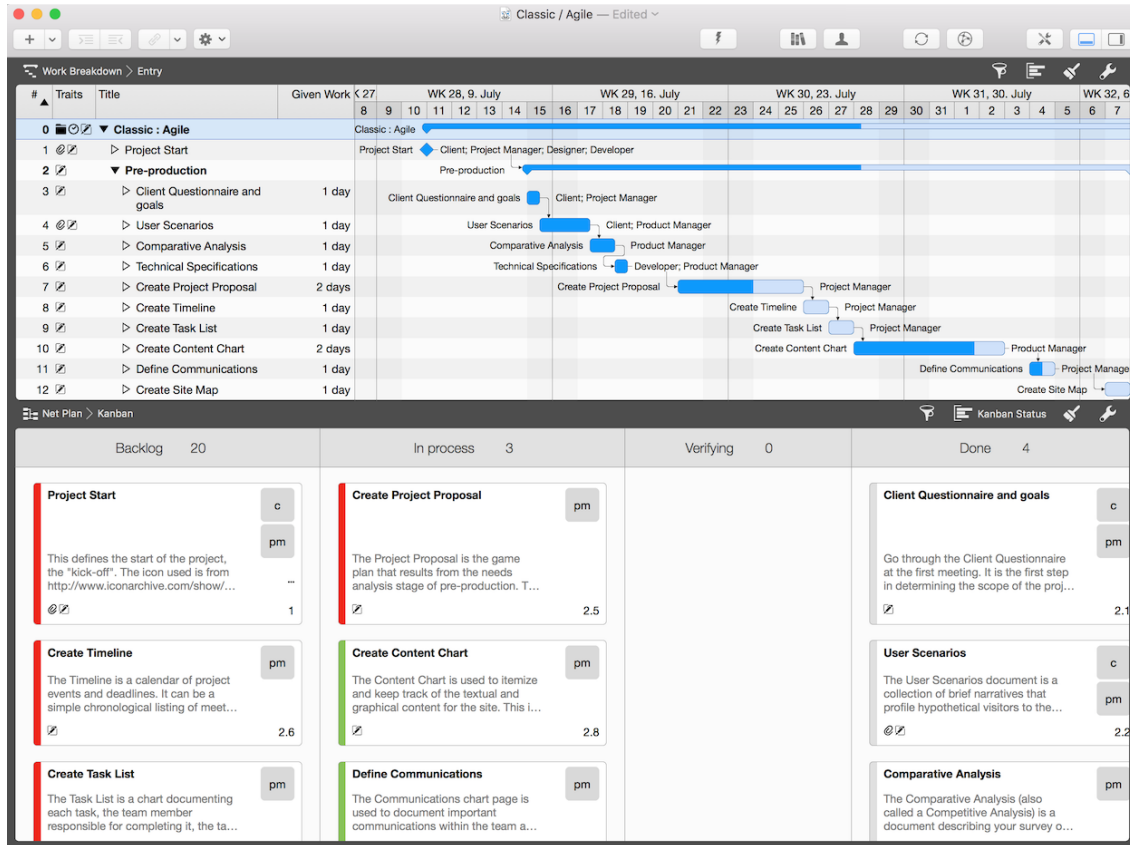

The boundaries between agile and traditional project management have finally vanished with the introduction of Merlin Project.

> You can switch whenever you want between the traditional *Work Breakdown* > *Entry* and *Net Plan* > *Kanban* view. Activate the secondary project view for a simultaneous overview of both methods.

Choose between two Kanban display modes in Merlin Project: Traditional and Compact. For the compact view, from the *Net Plan* drop-down menu select the *Kanban Compact* view.
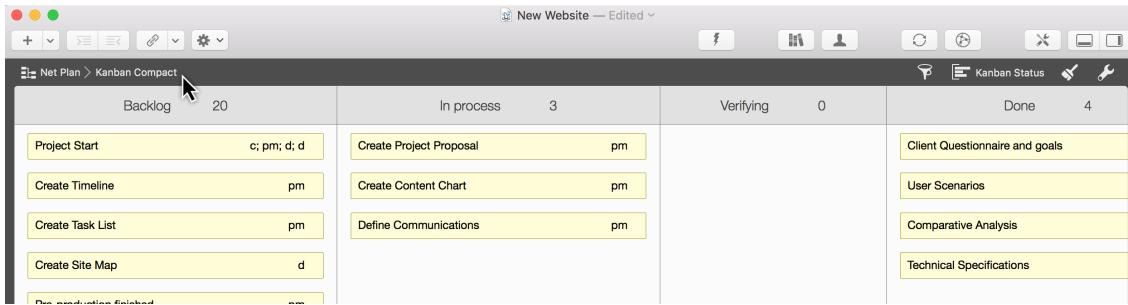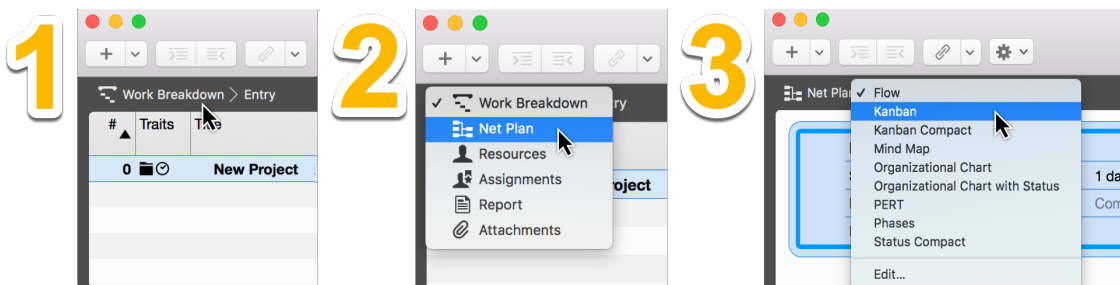
Using the Kanban view

Kanban offers a very flexible approach to working with projects. Read on to learn how you can get off to a quick start with Kanban in Merlin Project.
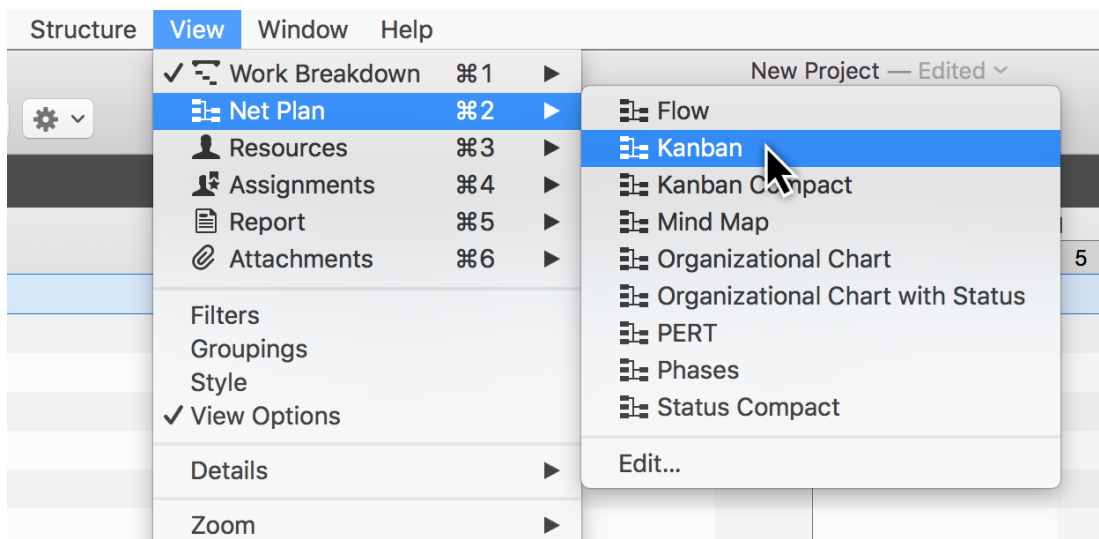
Open a new or existing project. To do so, click *File > Open* or use the keyboard shortcut *cmd + O*.

To create a new project, click *File > New* or use the keyboard shortcut *alt + cmd + N*.

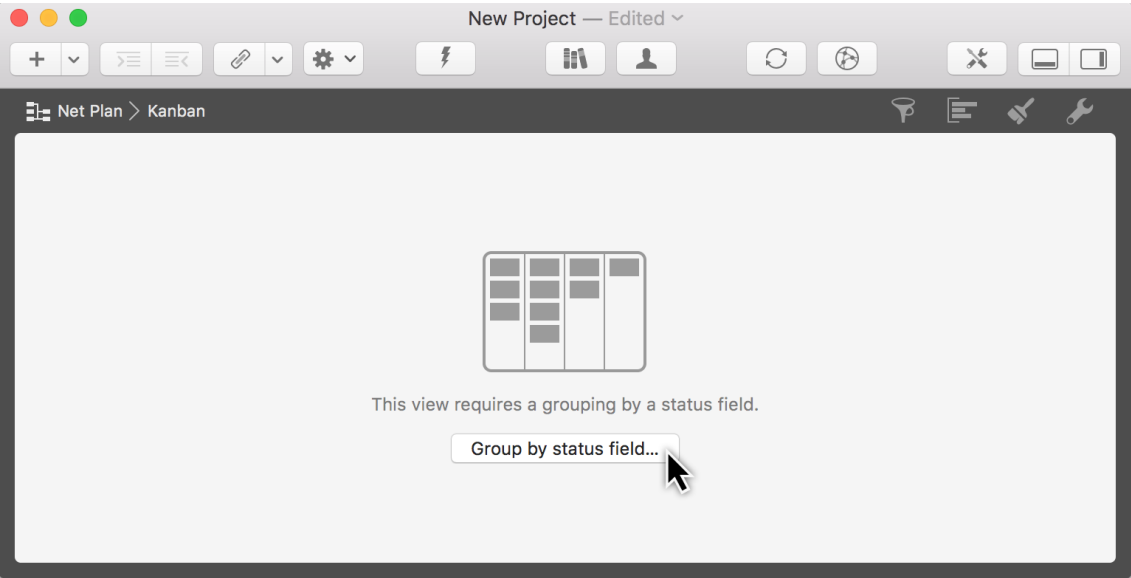Change from the *Work Breakdown > Entry* view to the *Net Plan > Kanban* view.

> You can switch quickly between views using the *View* menu. Just click *View > Net Plan > Kanban*.

Creating the Kanban view

When you first access the Kanban view a notification will appear with the button *Group by status field*.

 Kanban needs to be *grouped* by a *status field* and the *status values* it contains for the Kanban columns.

Click the button to open the *Grouping by Status Field* wizard.

The wizard includes pre-defined status field templates.

See the *»Groupings«* guide for further information on "groupings" in Merlin Project.

The options **»by new field:«** and **»Simple Kanban«** are preset automatically. Click **OK** to work with this Kanban status.

"Field" refers to custom fields. These fields can be created and managed in any Activity Inspector under the **»Tags and Fields«** tab.

The status values in the supplied **»Simple Kanban«** field can be seen as columns in the Kanban board.

New fields can be created or existing ones edited quickly. See the **Tags and Fields** guide for further information.

You can arrange the Kanban cards based on these **status values** and edit them with a defined Kanban status in the traditional view.

The status values can be changed in the wizard. Click on an entry to change it.

Read on to learn more about the individual status value options.

Grouping by Status Field

Which field should the cards in this view be grouped by?

- by new field from template: Simple Kanban
- by existing field: Status (calculated)

Status Values	Mapping to Completion	Min. Number of Cards	Max. Number of Cards
Backlog	Not started		
In process	0 %		
Verifying	80 %		
Done	100 %		
New Value			

Cancel   OK

Click the *plus* to create new status values or click *minus* to remove them.

The **»Simple Kanban«** field is perfect for a variety of projects. It makes it quick and easy to get started with the Kanban methodology.
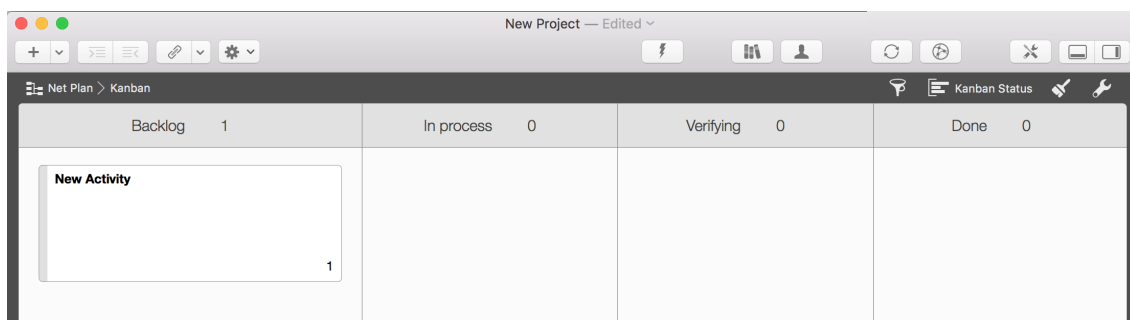
Applying the Kanban methodology

The following tells you more about using Kanban in Merlin Project.

The status values from the **»Simple Kanban«** field appear in separate columns in the Kanban board.

The columns are arranged from left to right with the following status values:

- *Backlog*
- *In process*
- *Verifying*
- *Done*

If the project has activities, these appear automatically in the columns as Kanban cards. The card's status in the project dictates in which column they are arranged.

You can create new Kanban cards by clicking the ***plus icon*** or using the keyboard shortcut ***cmd + N***.
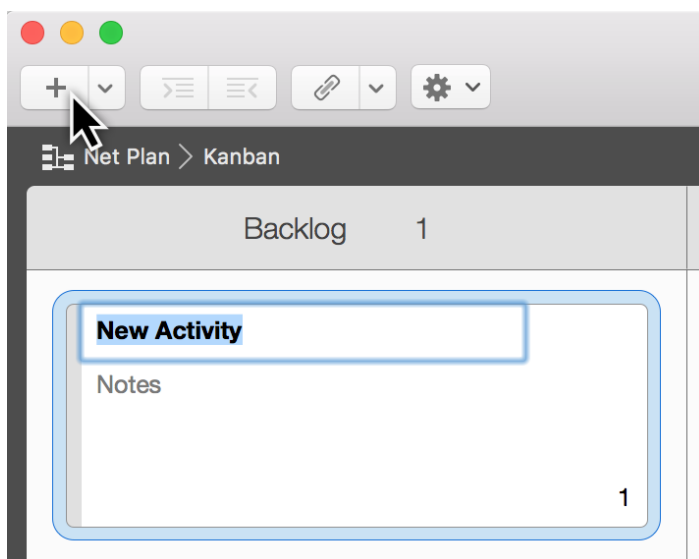

The card that is created appears automatically as an activity in the traditional view. Click the *arrow* on the right next to the *plus icon* to create further card types as well as attachments.
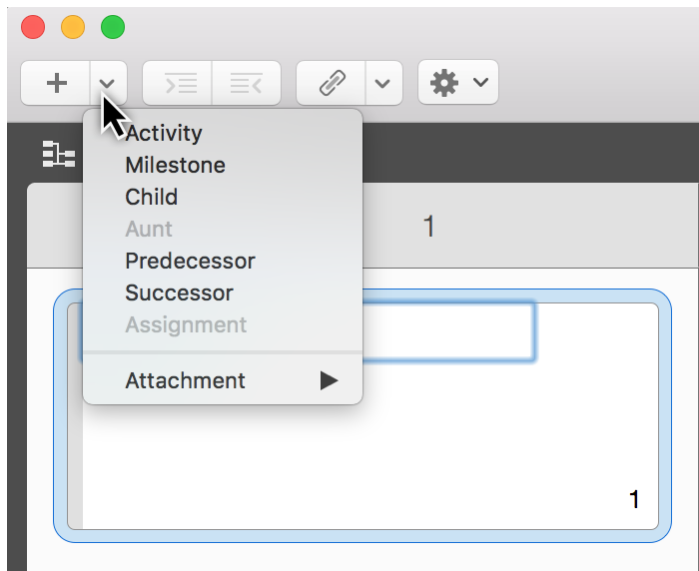
The same functions as appear under the **arrow** can also be found in the **Insert** menu.

Select one or more cards and then click **Attachment**.

This option lets you add any files or information to the selected card(s). Attachments are represented by a paperclip in the lower left corner of the card.
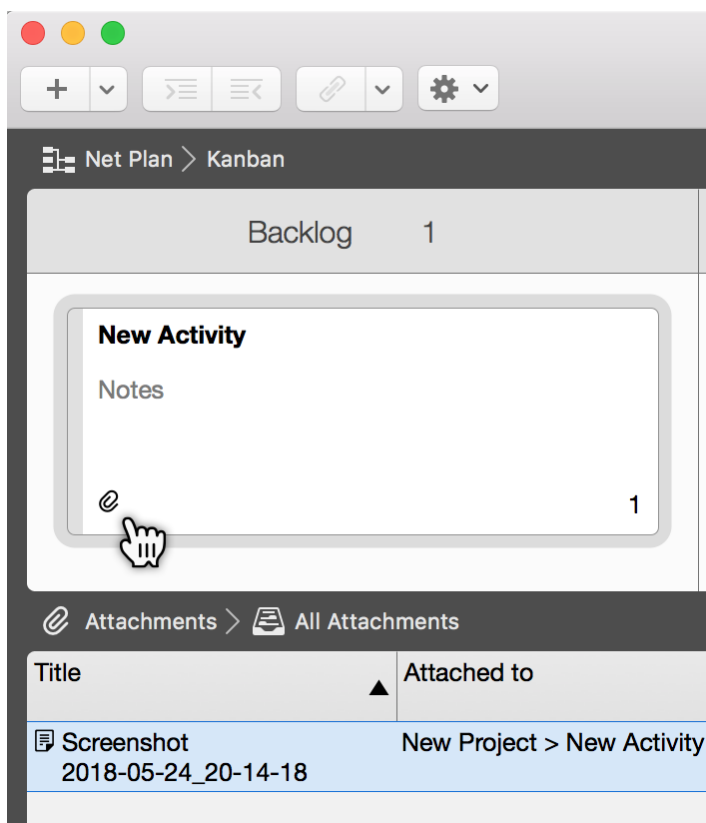
Wizard: grouping Kanban by status field

Grouping by **status field** is required for the Kanban view.

The wizard includes the following status field selection options:

- **by new field from template:**

  - *Simple Kanban*

  - *Software Development*

  - *Issue Fixing*

  - *Editor*

  - *Exhibitor*

  - *Sales*

  - *Attention level*

  - *Field with custom status values*

- **by existing field:**

  - *Status (calculated)*

Once you have selected the status field, a preview will appear of the *status values* contained in the status field.

The **by new field from template** option lets you start directly with a new pre-defined template. This is the easiest way to create a Kanban.

The drop-down menu options can already be used for a variety of projects. The **by new field from template** option lets you select custom fields, that are already included in the

project, to group the columns.

> **(i)** In newly created projects, the existing **Status (calculated)** field appears in the drop-down menu.

The **Status (calculated)** field differs from most fields as it accesses the values calculated in the project. This means you can no longer move the Kanban cards in the Kanban view manually; they are moved automatically by the values calculated in terms of the project's progress.
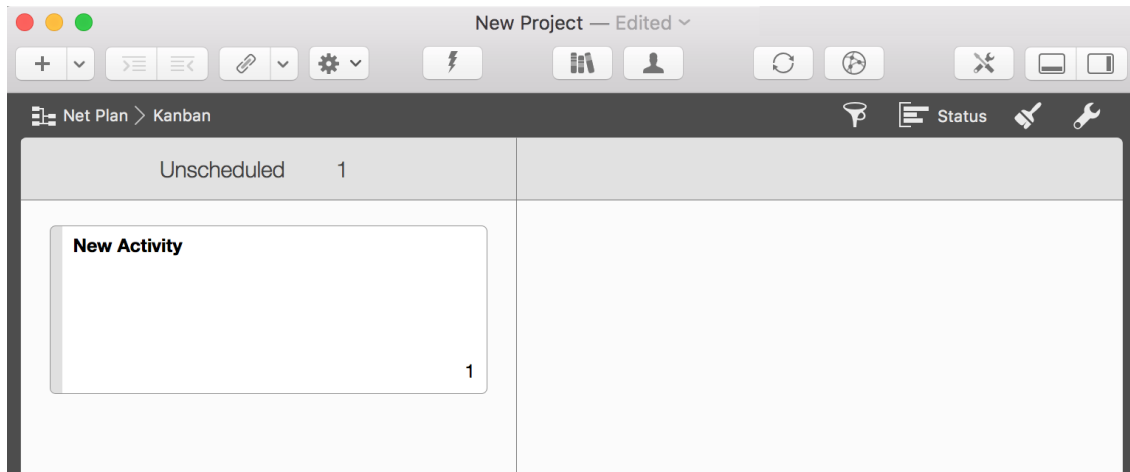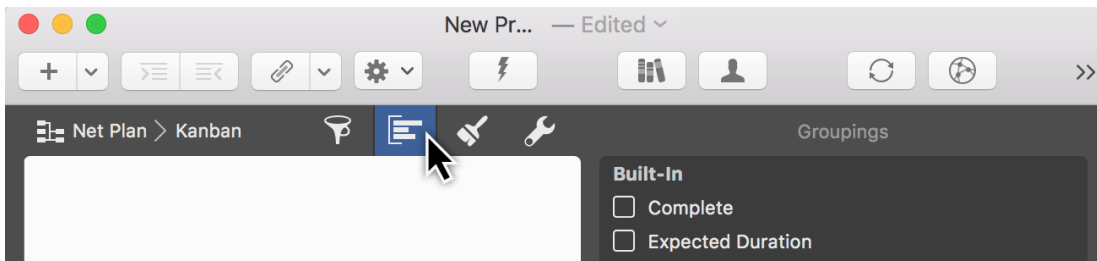

Should a Kanban board be grouped by **Status (calculated)**, the *Unscheduled* column is shown as a single column until the project is progressing within actual values.

The status can be also shown in a column with the same name in the **Work Breakdown > Entry** view.
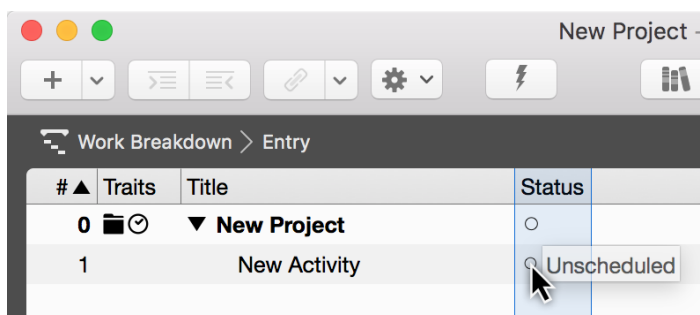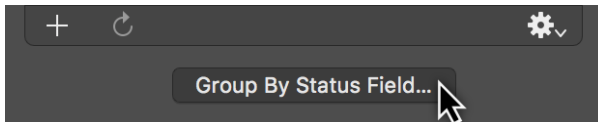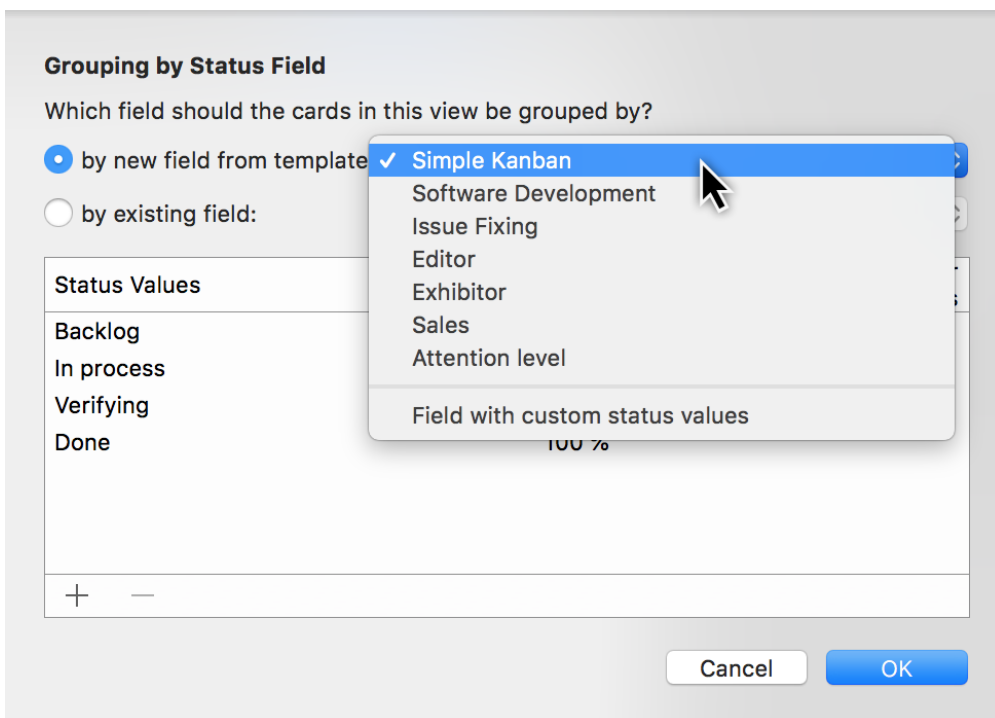

Re-accessing the grouping wizard

Click the **Grouping** icon to display the list of built-in groupings.

Click the **gear icon** in the Group Inspector and a drop-down menu will appear as shown. Click the option **Group by Status Field**.
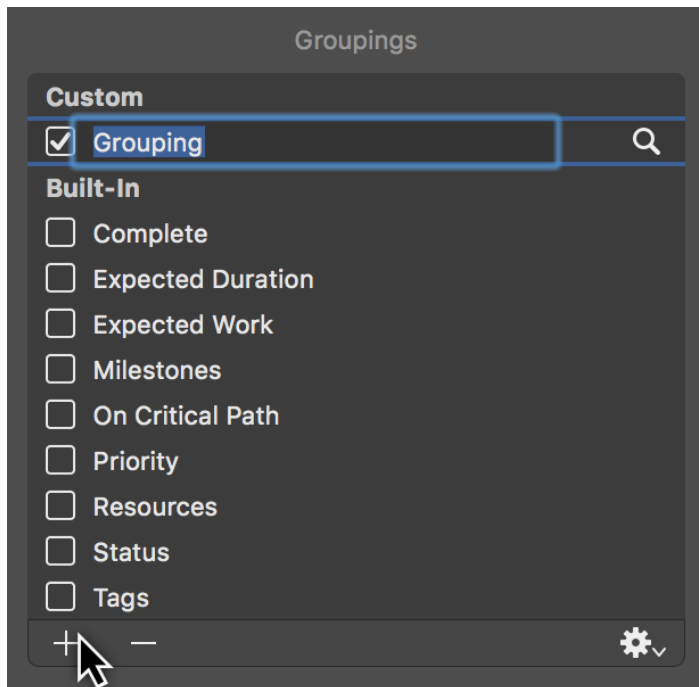

The Grouping by Status Field wizard will appear. Select your desired grouping for the Kanban view.
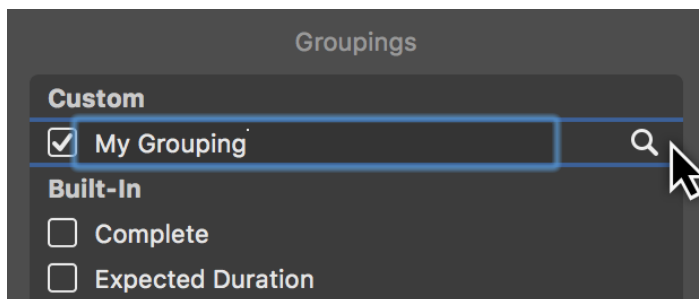

Creating custom groupings

Click the **Grouping** icon to display the list of built-in groupings.

Click the **plus icon** on the bottom left in the Group Inspector. A new grouping in the **"Custom"** category will be created.
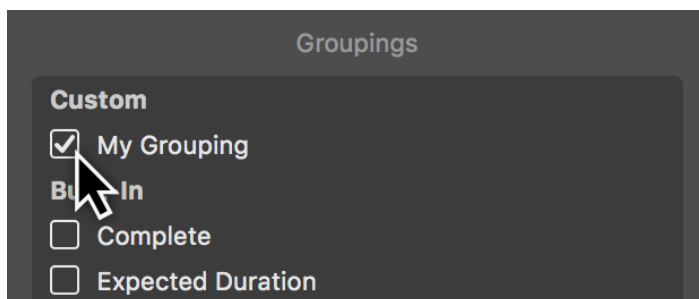
Name the grouping and then click the ***magnifying glass***.

The dialog for modifying the grouping will be displayed. You can set the grouping options here. The view will be grouped based on these options. To do so, use the drop-down menu.
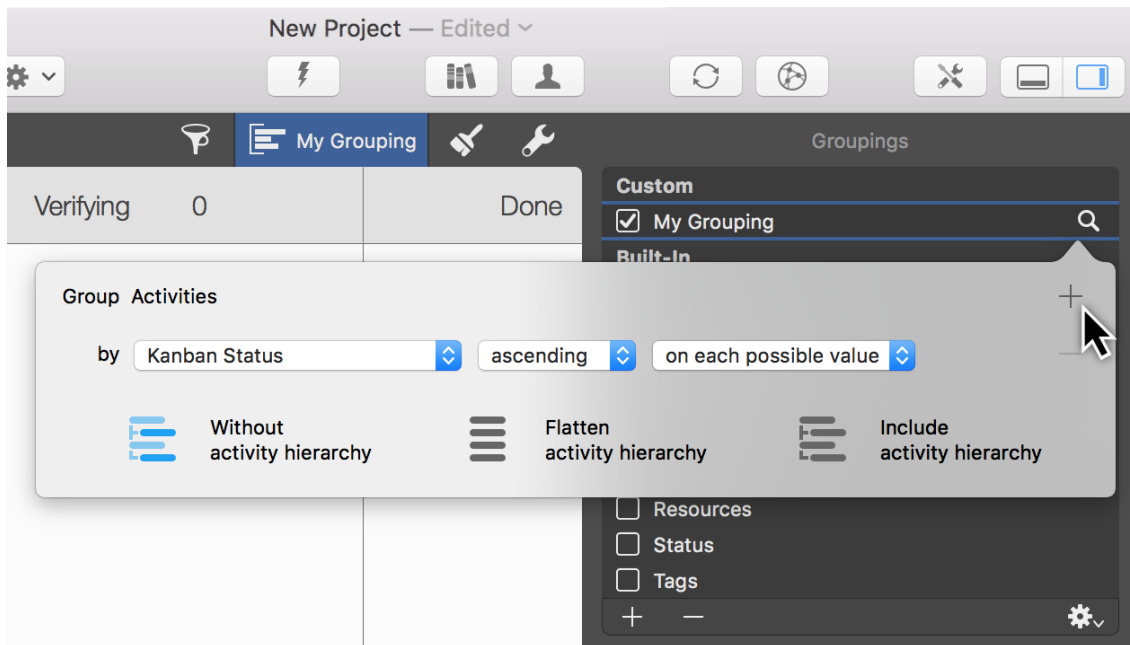
Click the **plus** icon to add additional grouping conditions. Click the **minus** icon to remove them again.

Click the rectangle on the left next to a grouping to activate it and apply it directly in the Kanban view.

> You can modify existing groupings if required. To do so, select an existing grouping and click the **magnifying glass** to the right of it. Once you have modified it, the new configuration will be adopted in the selected grouping.
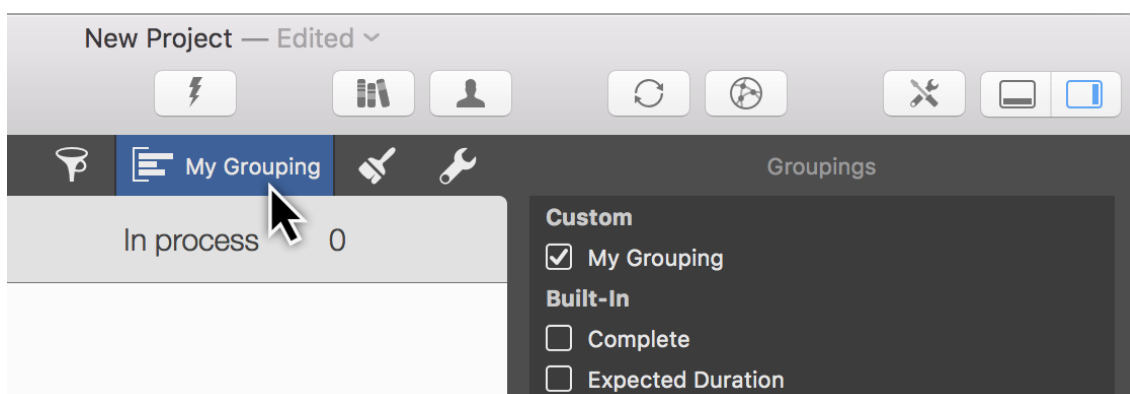
The active grouping will be displayed next to the **grouping** icon. Click it to access the list where you can change or modify the grouping whenever you want.

Adjusting status fields

Click a column title in the Kanban view to display the **"Group"** Inspector. The clicked value of the status field will be displayed there and can be adjusted.

> 🛈 Columns with calculated values are an exception as these cannot be changed or adjusted in the Inspector.
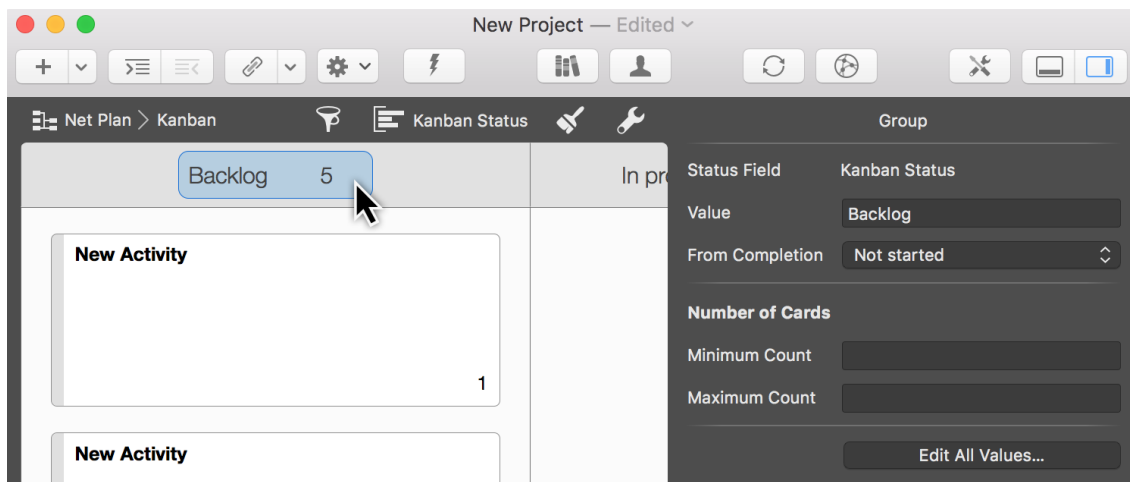
You can choose from the following options in the **"Group"** Inspector:

- **Value** (*column title name*)
- **From Completion** (*drop-down menu with completion values from 0% to 100%*)
    - **Edit All Values…** (*displays the Custom Fields Inspector*)
    - **Select Status Field** (*displays the Grouping by Status Field wizard*)
- **Number of Cards**
    - **Minimum Count**
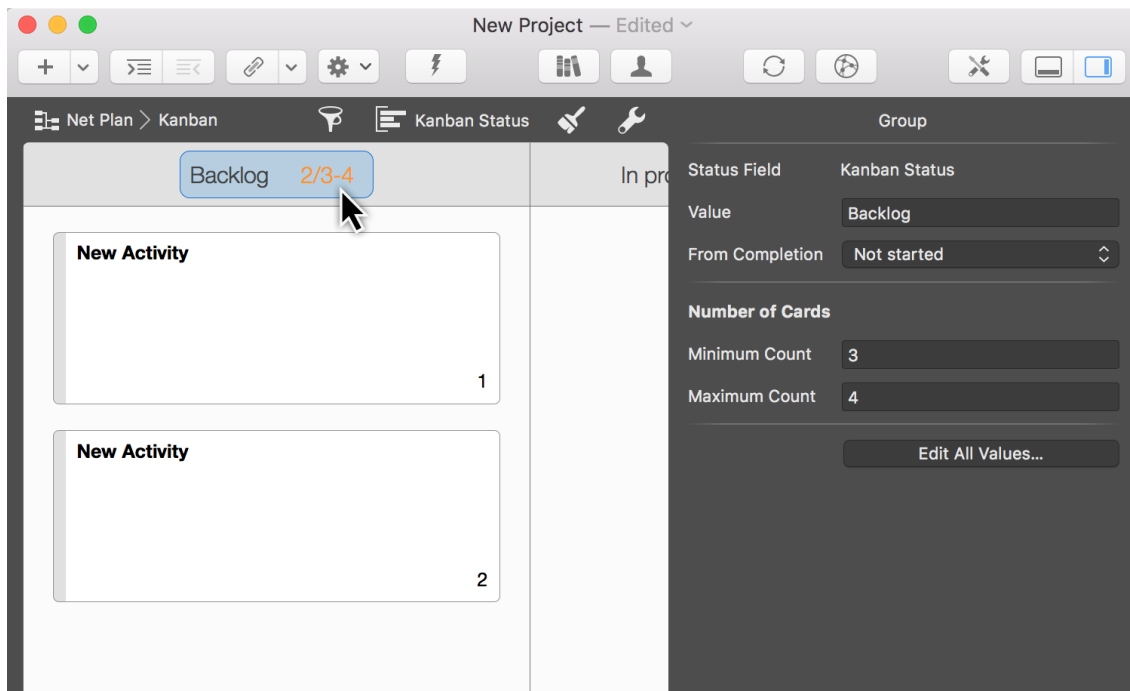   - **Maximum Count**

> 🛈 The **Grouping by Status Field** wizard includes the same settings for the values.

Click the **Edit All Values** option in the **Group** Inspector to open the Inspector for the current grouping values. See the *Field Values Inspector* section for further information.

The **Minimum Number** option lets you set the minimum number of cards displayed in the column.

If you set a minimum number of cards, a counter with the current number of cards and the

minimum number set is displayed in the title column.

> ℹ️ If the minimum value is higher than the current number of cards, the title column is highlighted in orange.

The **Maximum Number** option lets you set the maximum number of cards displayed in the column.

If you set a maximum number of cards, a counter with the current number of cards and the maximum number set is displayed in the title column.

Kanban fields

You can edit and adjust the field values in the **Custom Fields** Inspector.

These field values set the progress for the cards and in doing so for the activities in the Kanban view and other views in Merlin Project.

Field Values Inspector

The current grouping and associated values can be found in the **Custom Fields** Inspector.

Click the icon to the right of the value and all available values in the active grouping will appear in the drop-down menu. These values are used for the columns in the Kanban view. The selection is applied immediately for the selected card(s).
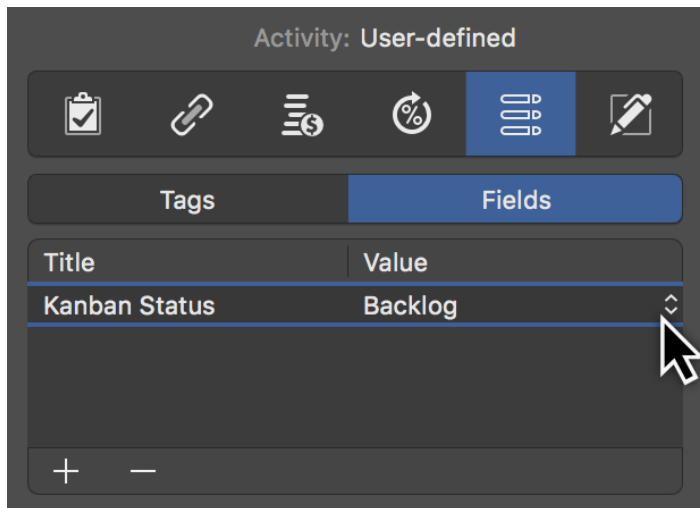
Pre-defined values

You will find a list of **pre-defined values** for the active grouping further down in the Inspector. Click the **plus icon** or **minus icon** to add/remove values to the grouping.

The values can have different properties. These are:

- Value

- Completion

- Min

- Max

- Level

Value is also the title of the column in the Kanban view

Completion controls the progress of the activities both in the Kanban view and in all other views.

The following options are available:

- *Empty* (no completion)
- *Not started*
- *0% to 100%* (in increments of ten)

When entering a *% value* for an activity that corresponds to the *% value* in the **Completion** column, the card associated with the activity is moved automatically in the Kanban column.

Conversely, you can also move a card manually. If you move a card in this Kanban column, the activity is assigned the % completion value automatically.

Min is the minimum number of cards in the Kanban column. This value corresponds to the Group Inspector option with the same name.

Max is the maximum number of cards for the Kanban column. This value corresponds to the Group Inspector option with the same name.

Level includes the optional categorization of the value in:

- *Neutral* (white circle)

- *Normal* (green dot)

- *Warning* (yellow triangle)

- *Critical* (red rectangle)

This categorization is only visible in the list of vales and has no planning impact; it is for the planner's information only.

The **Allow free entry** option is deactivated as the status fields use pre-defined and/or calculated values. Free entry is therefore not possible.