

S3 Kanban Board – Admin Guide

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1 Introduction

By bringing the intuitive feel of a Kanban board to your Power Platform or Dynamics 365 environment, The S3 Kanban Board allows you to visualize records as dynamic cards across customizable columns. Forget manual status updates; with seamless drag-and-drop functionality, you can instantly move records between stages, updating your data in real-time while maintaining a clear, bird's-eye view of your entire workflow. Whether you're tracking tasks, managing sales pipelines, or monitoring project milestones, the Kanban Board turns static lists into an interactive, high-velocity workspace.

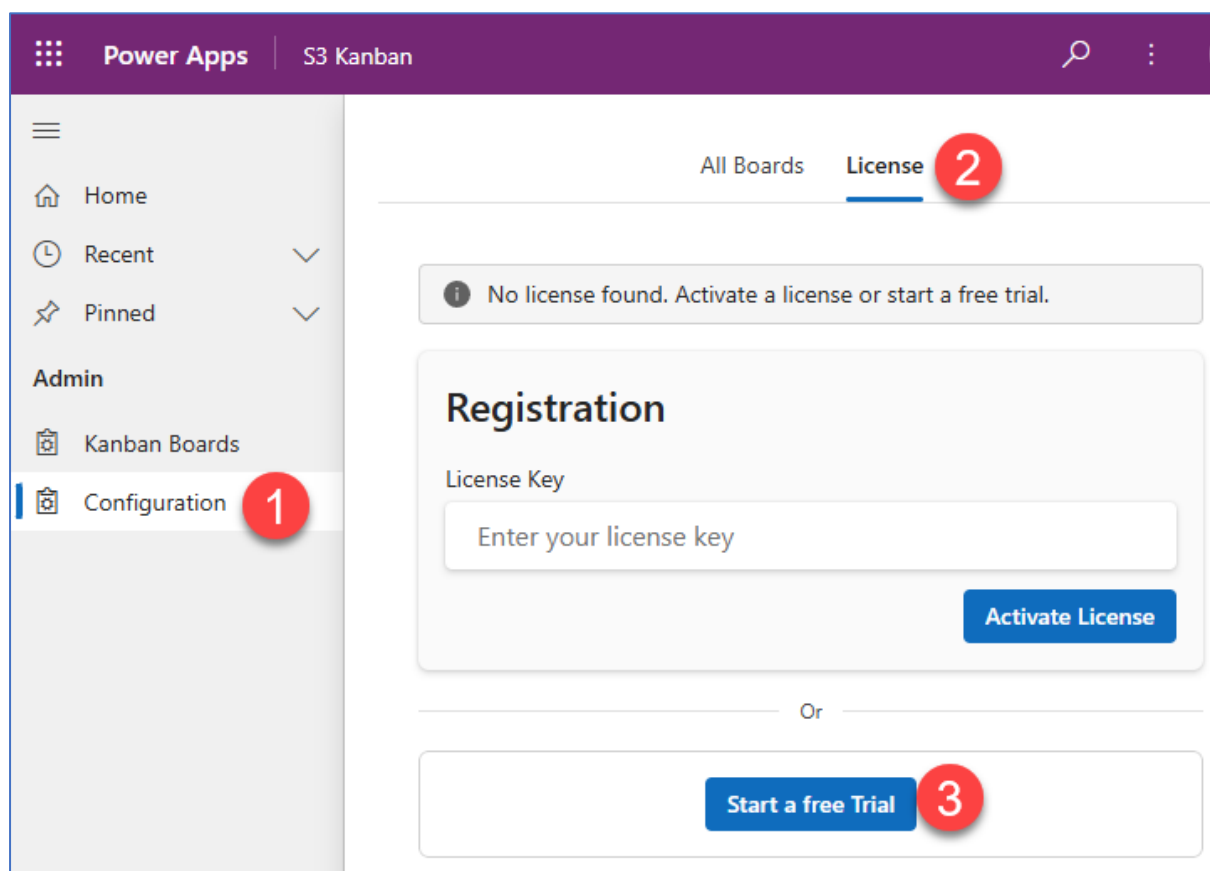
2 Installation

You can install the solution via Microsoft AppSource Marketplace or via a solution file provide.

1. Installation form AppSource
2. Install a Solution Package

3 Licensing

You can use the product for three months with a trial license which you can activate from configuration page. Launch the S3 Kanban Board app and select Configuration from left navigation and the select License tab as shown below:



Note: If you need any assistance with licensing or using the product, please contact info@s3digital.com.au

4 Configuration

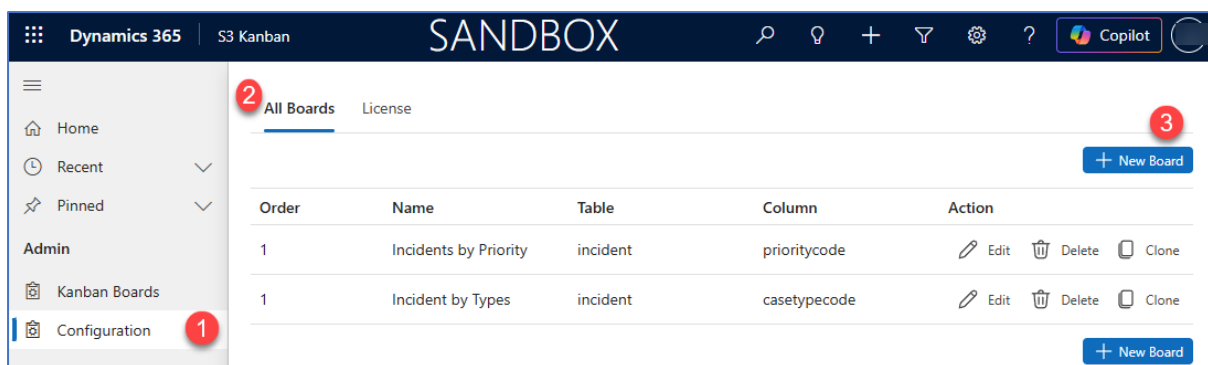
4.1 Roles and Permissions

There are two following roles to configure and access S3 Kanban Board:

- **S3 Kanban Admin:** Users with this role can access configuration page of the product, allowing to manage license and setup kanban boards.
- **S3 Kanban User:** Users with this role will be able to access Kanban boards that they have access to.

4.2 Manage Kanban Boards

An user with *S3 Kanban Admin* role can create Kanban Board. You can navigate to Configuration page and create an new Board or clone an existing one as shown below:



In the New Board page, you can provide required input as per below table:

Field Name	Description
Board Name	Name of the Kanban Board
Board Order	The order in which the boards will be shown in dropdown to users
Table	The table the board will retrieve data from
Column	The selected Table's column (dropdown type) which will be used to show vertical sections in Kanban Board. For example, if the column in Priority with values High, Medium and Low; the Board will render three vertical columns/sections to show items.
View	If you want to let user select a view of selected table, leave this empty. Otherwise, you can pre-select a view, and user will then not be able to change view.
Business Unit	If you have multiple Business Unit you can select which Business Unit can access the Board.
Who can see the board?	If you want the Board to be accessible by all "S3 Kanban User" users then leave it empty. Otherwise, you can restrict the Board to one or more security roles.

Title Column	The column value will appear as Title of Card.
Description Column	Optionally, you can select a field to show description below Title inside the Card.
Row 1-5	You can select up to five columns to show inside Card.

The Dashboard Configuration page looks like below:

Board Name *

Board Order *

Table *

Select table...

Column * ⓘ

Select column...

View ⓘ

Select view...

Business Unit *

s3products-uat

Who can see the board? ⓘ

Select security roles...

Card Details

Title Column *

Select title column...

Description Column

None

Row 1 *

Select row 1 column...

Row 2

None

Row 3

None

Row 4

None

Row 5

None

The card will look like below:

Title Column
Description Column

Row 1:
Value

Row 2:
Value

Row 3:
Value

Row 4:
Value

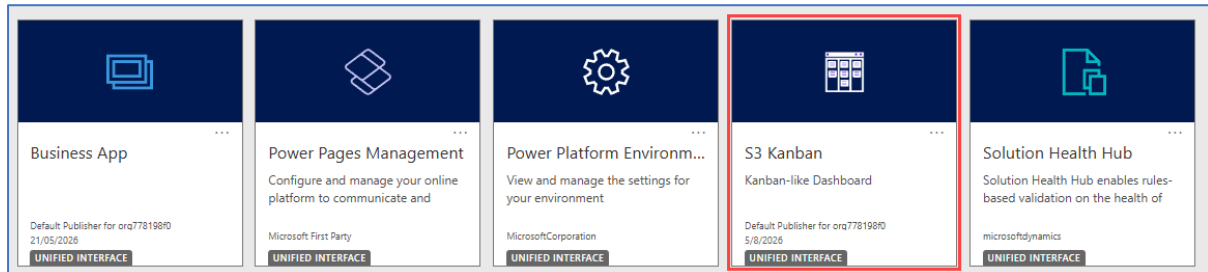
Row 5:
Value

4.3 Different ways to Access Boards

There are two ways you can access the kanban boards created in your environment.

4.3.1 Option 1: S3 Kanban App (Full App Experience)

This is full-app experience where you can access the Kanban Board only. If you want to embed the Kanban Board in your application, please check the next option. After you have installed the app, assigned users the required roles, you can launch the S3 Kanban App from application selection page as shown below:

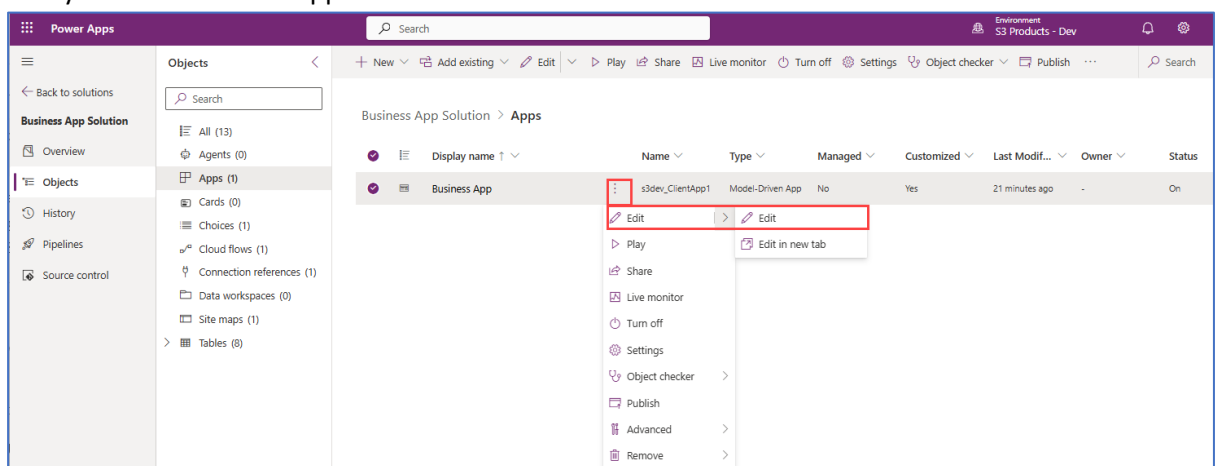


Note: Only users with right permissions will see the S3 Kanban app. If some of users not seeing the app, please check if they have either *S3 Kanban Admin* or *S3 Kanban User* role assigned.

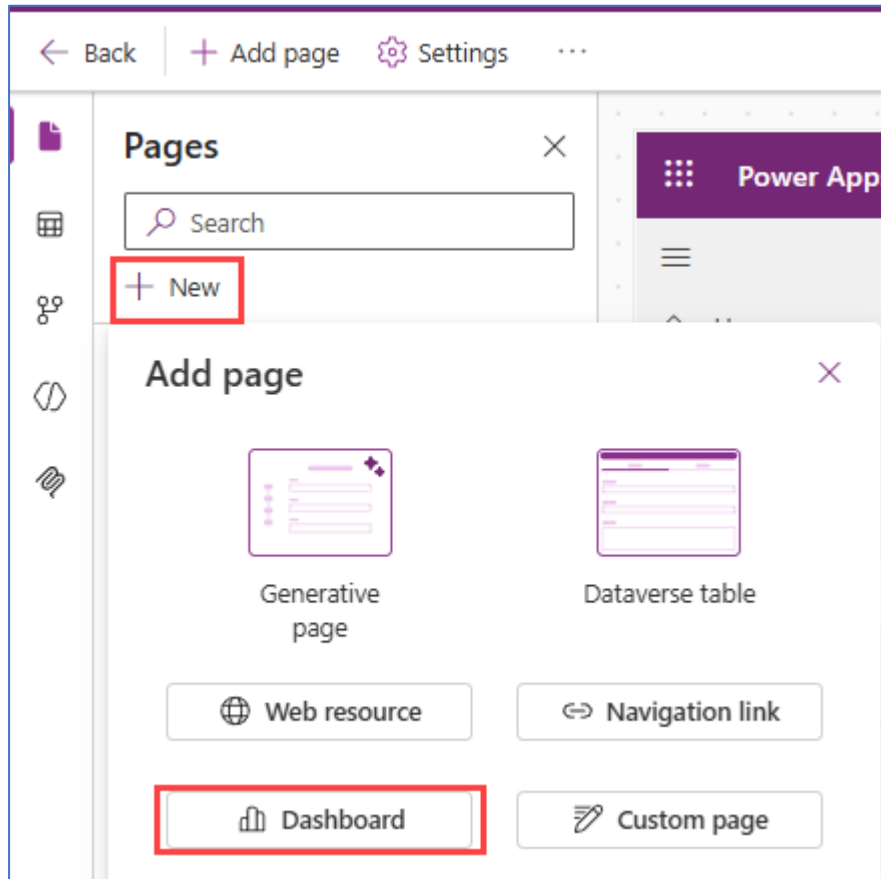
4.3.2 Option 2: Embed Kanban Board in your App

Sometimes, you want to see Kanban Board(s) inside your application rather than switching between your business app and S3 Kanban app. Please follow the steps below to include S3 Kanban Dashboard into your app.

1. Login to <https://make.powerapps.com/> and select your environment. If you have dev, test, prod environments, please make the changes in your dev and deploy the changes via a managed solution into test/prod environments.
2. Find your Model Driven App and click Edit as shown below:



3. In the app editor, select New and then Dashboard as shown below.



4. Next Find the “S3 Kanban Dashboard” and select the checkbox next to it, to add the dashboard to your app.
5. Finally save and publish the app.

Note: It might a few minutes before the dashboard shows up in your app.