EYLEAN BOARD. USER GUIDE.

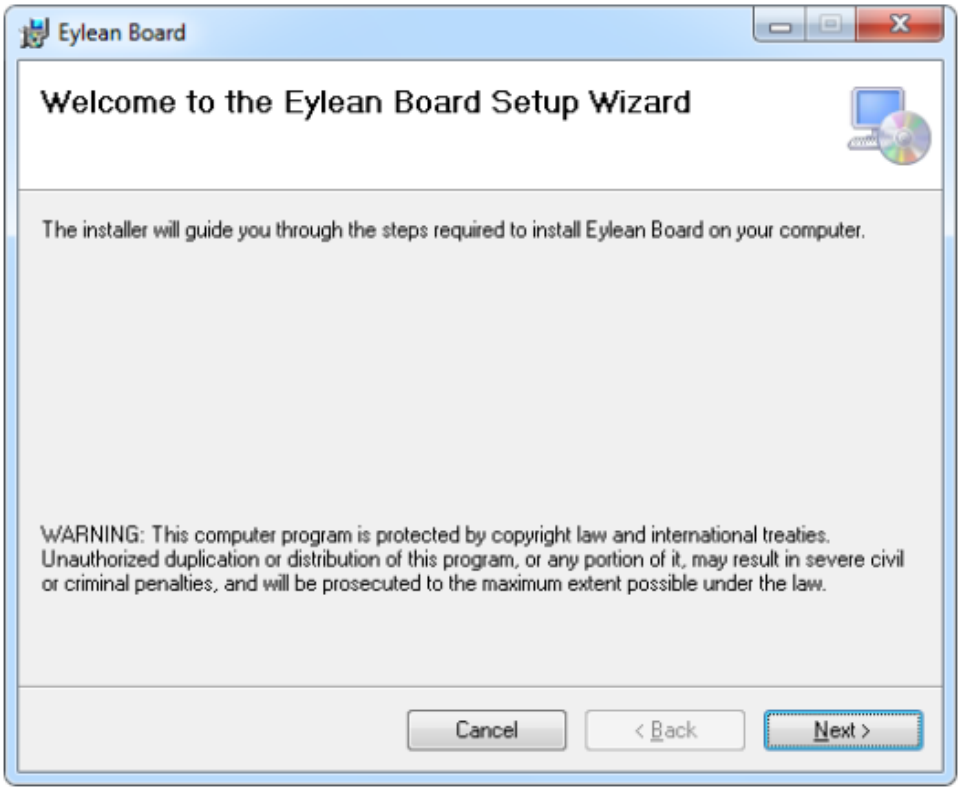
Contents

1. Introduction

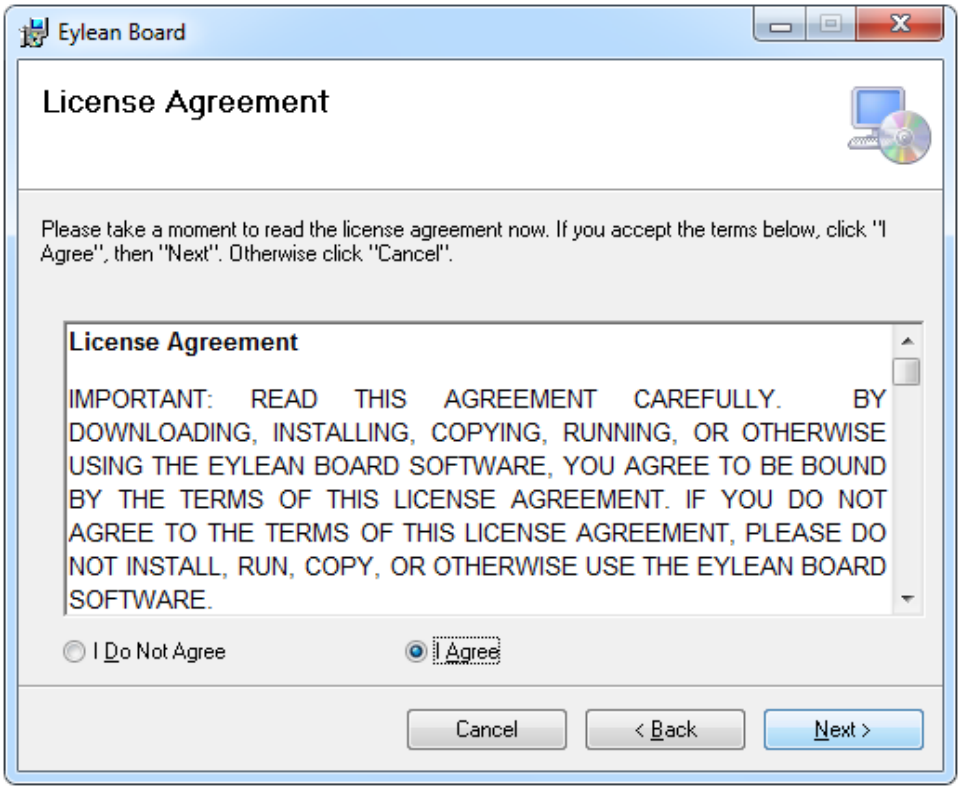
Eylean™ Board is project management software for Agile teams. Eylean Board supports Kanban, Scrum and Agile board templates. In addition, it is fully configurable to fit any custom process and can be integrated with Microsoft Team Foundation Server (TFS). Eylean™ Board provides process visualization, task and team management, meaningful reports, intuitive user interface and is multi-touch optimized.

2. Installation

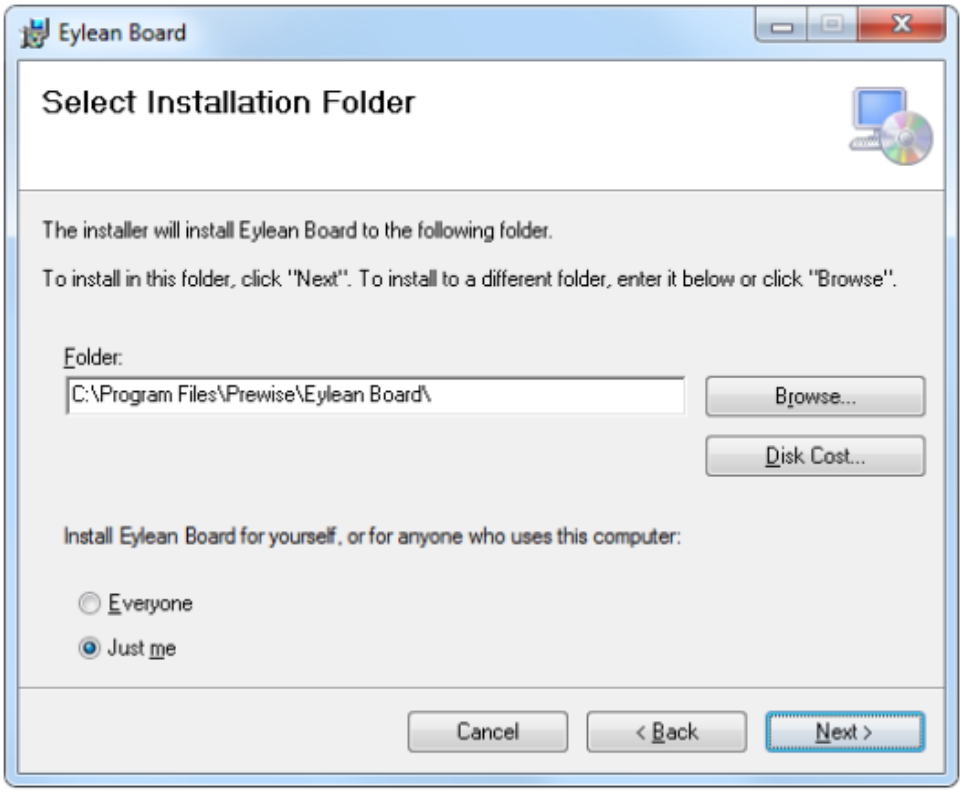
1. Run Eylean.Board.Setup.msi.
2. Examine the welcome screen and click **Next** to continue.



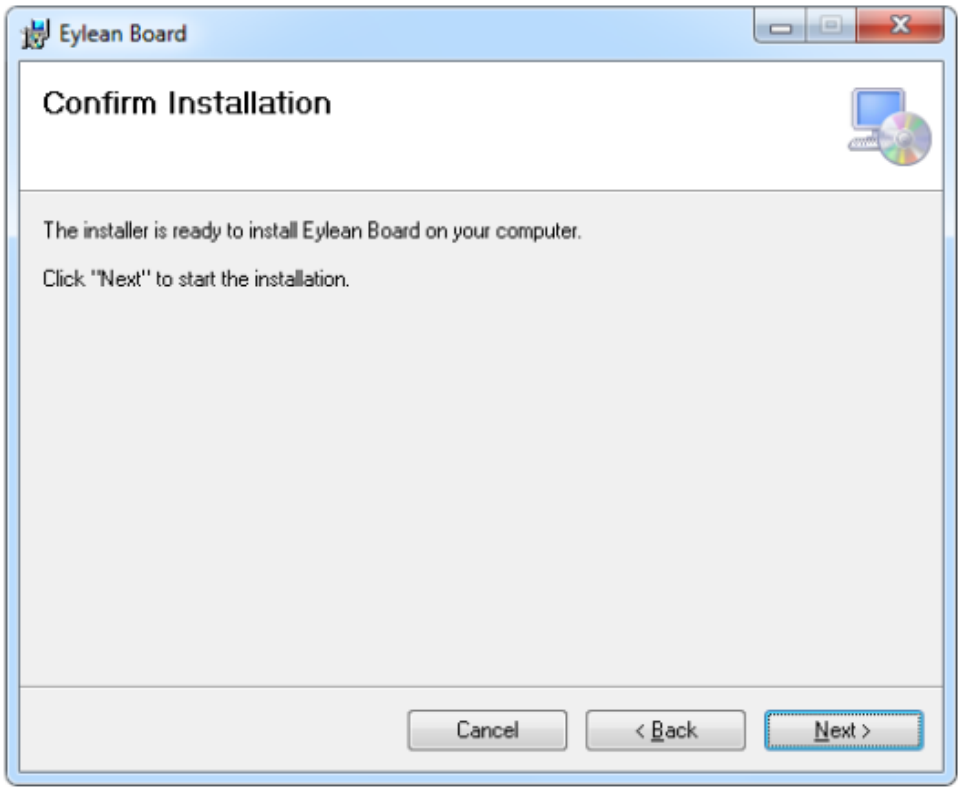
3. Please read the license agreement carefully. Check the **I Agree** radio button and then click **Next** to agree to terms and conditions.



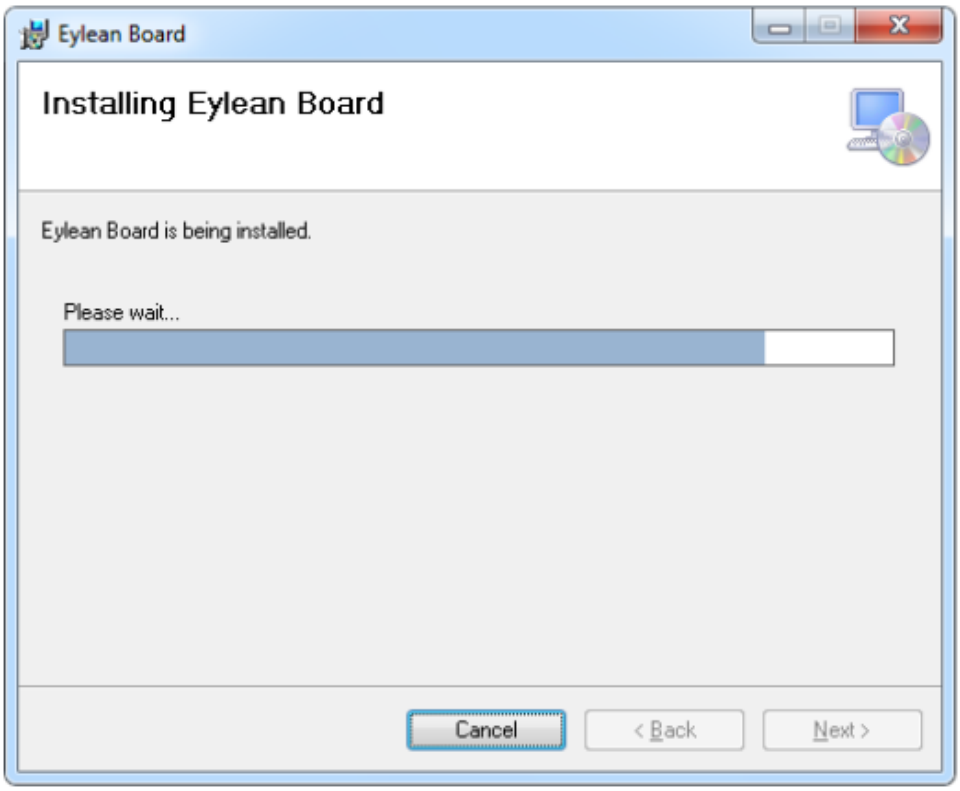
4. Click **Next** to select the default folder destination. Alternatively, click **Browse** to select the path where the application should be installed and then click **Next**. Also choose the option whether to install **Eylean Board** just for yourself or for anyone who will use the computer.



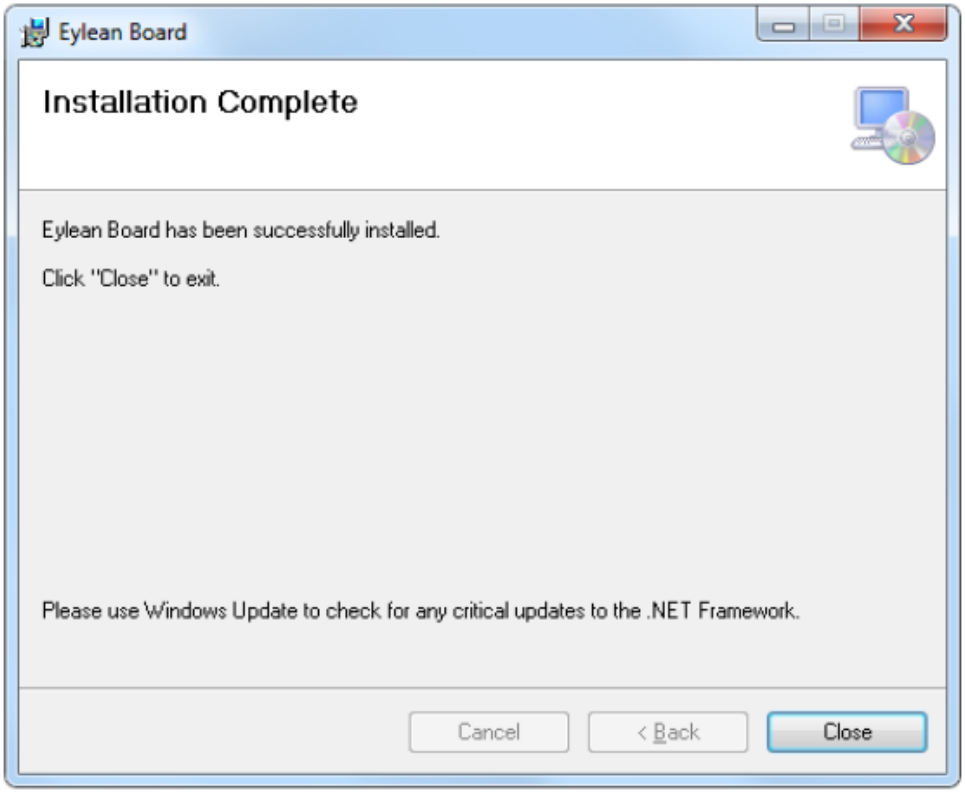
5. Click **Next** to start the installation.



6. Please wait while the setup wizard installs the application.



7. The dialog box informs that the Eylean Board application has been successfully installed. Click **Close** to exit.



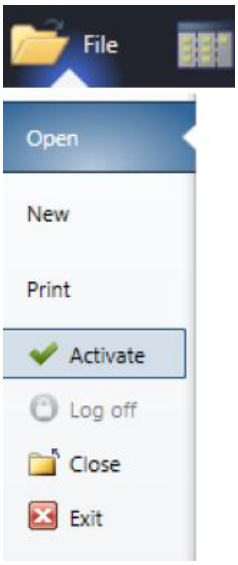
3. License activation

3.1. Eylean Board Activation over the Internet

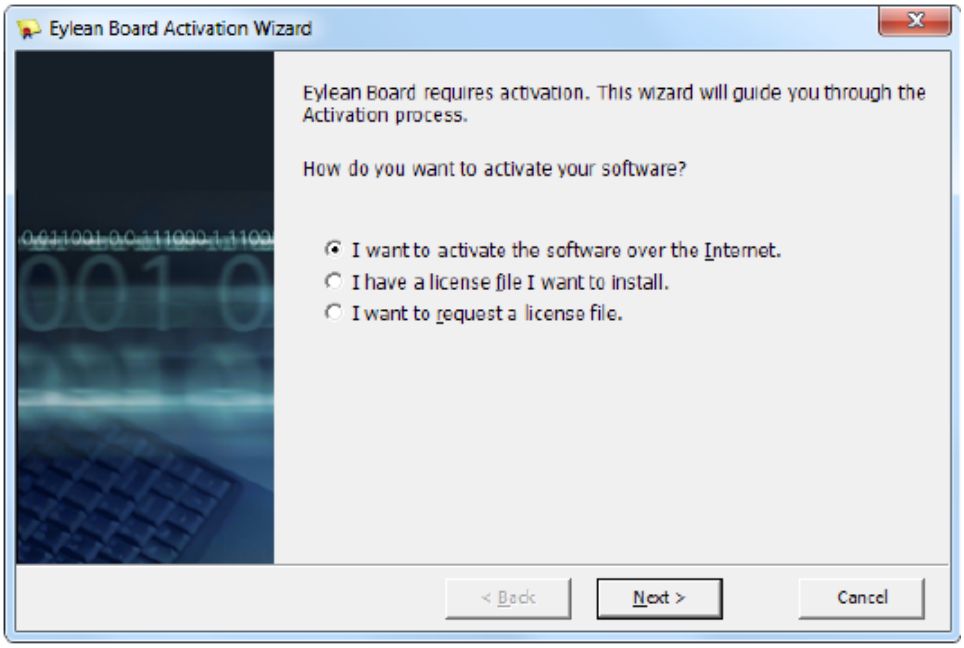
To start using the Eylean Board application after installation, you will have to activate its license.

1. To activate the license over the Internet, open Eylean Board application in your computer.
2. The **Activation Wizard** window will open to guide you through the activation process.

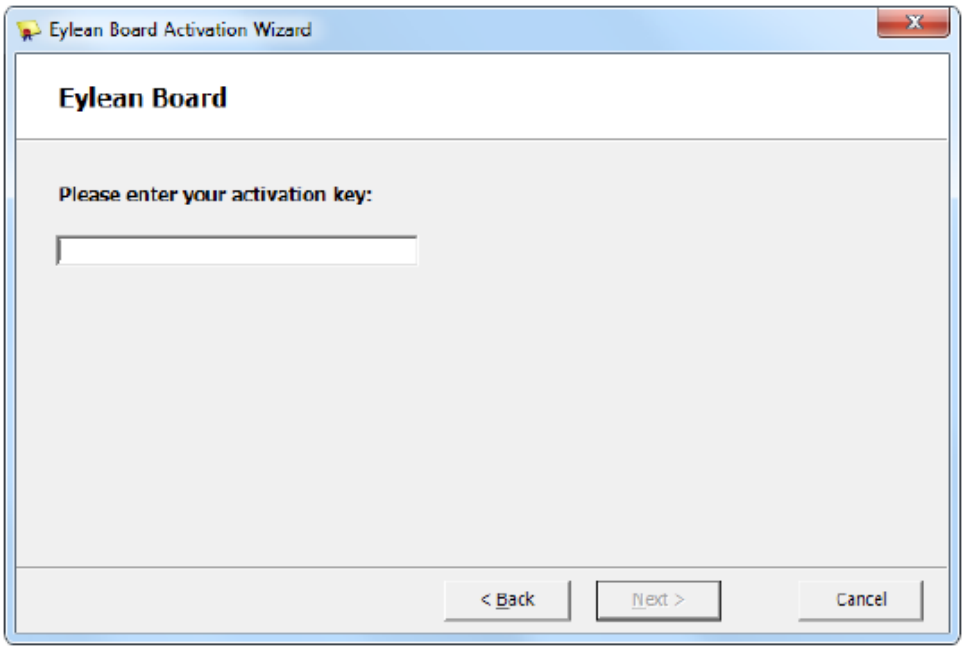
Note! If the **Activation Wizard** does not open automatically, select **File** at the top of the screen and then click **Activate**.



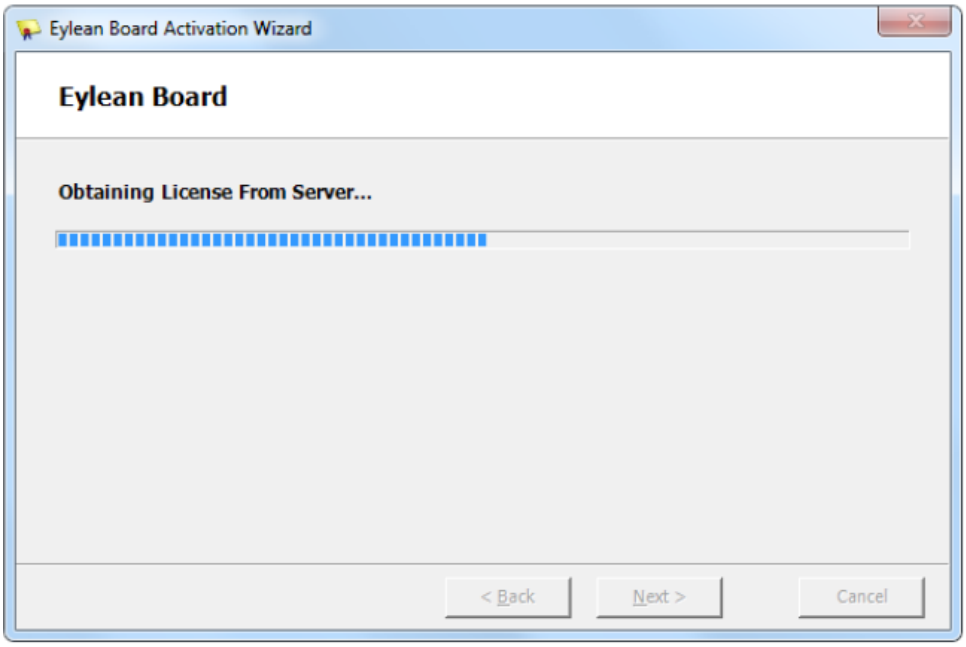
3. Select **I want to activate the software over the Internet** option and then click **Next**.



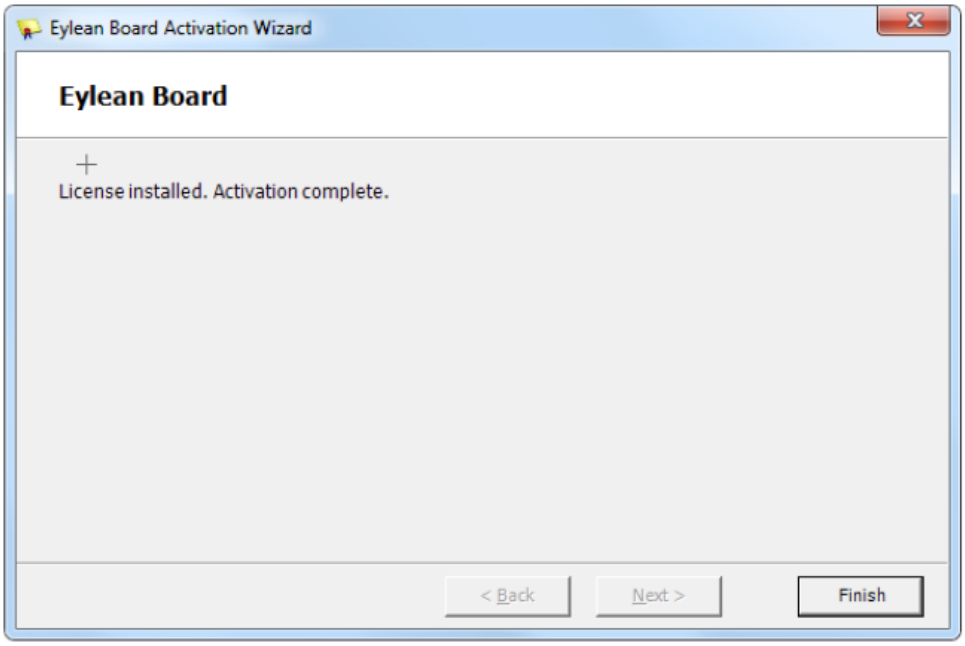
4. Enter your activation key and click **Next**.



5. Wait until the license is obtained from the server.



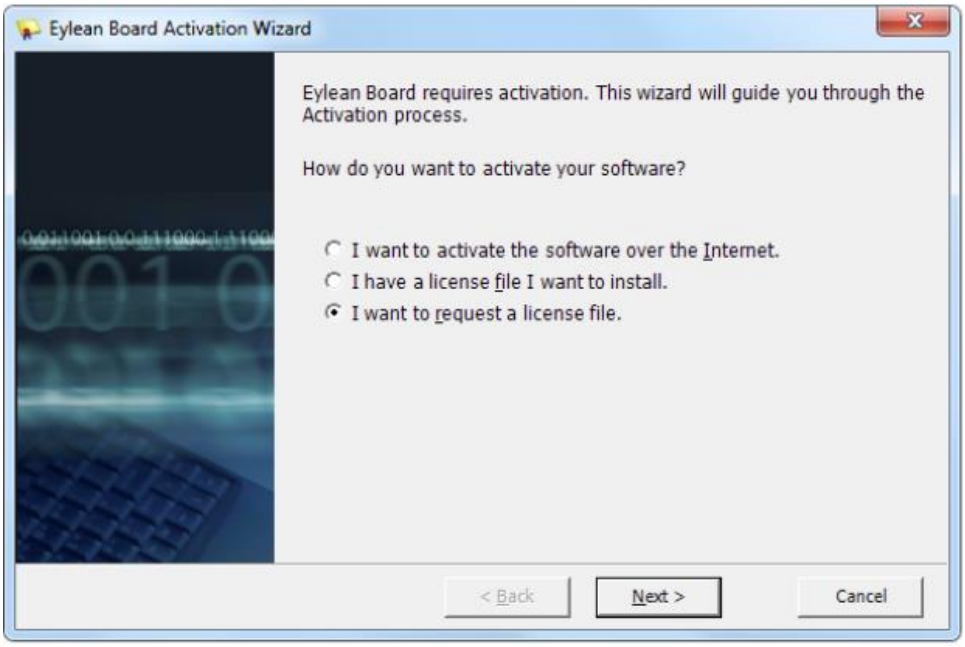
6. When the activation is complete, click **Finish**.



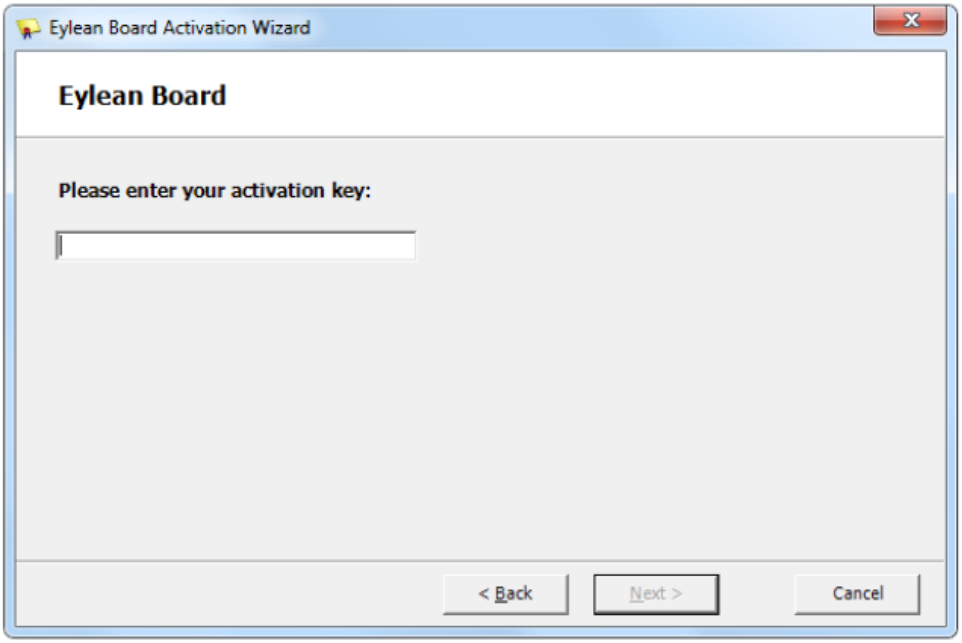
Note! This type of activation is valid for both trial and full versions of the product.

3.2. Eylean Board Activation with a License File

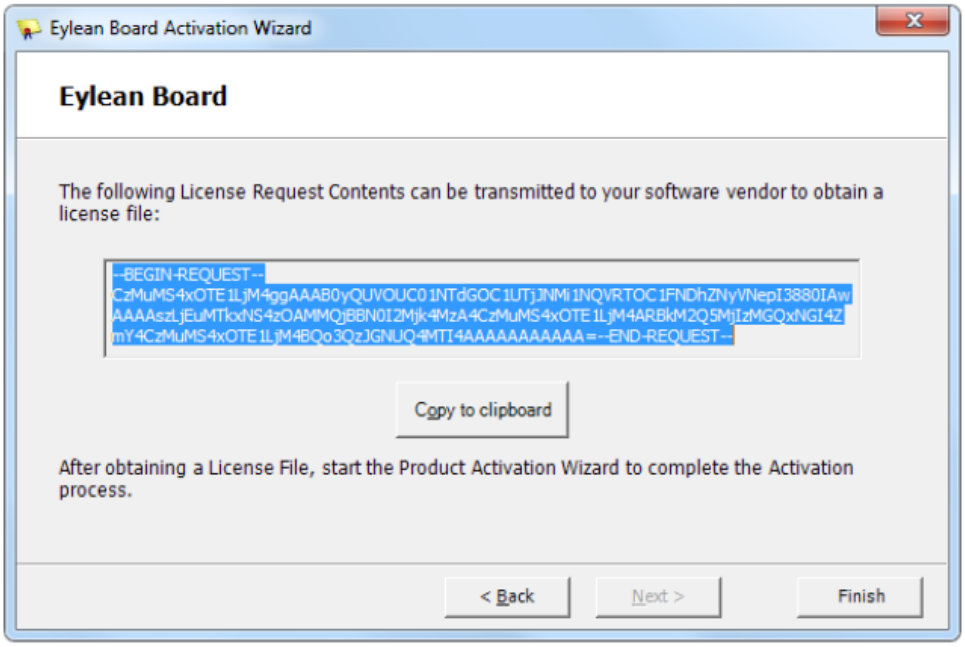
1. You can also activate the Eylean application by requesting a license file. Open the Eylean Board application. When the **Eylean Board Activation Wizard** window will open, select the **I want to request a license file** option and then click **Next**.



2. Enter your activation key and click **Next**.

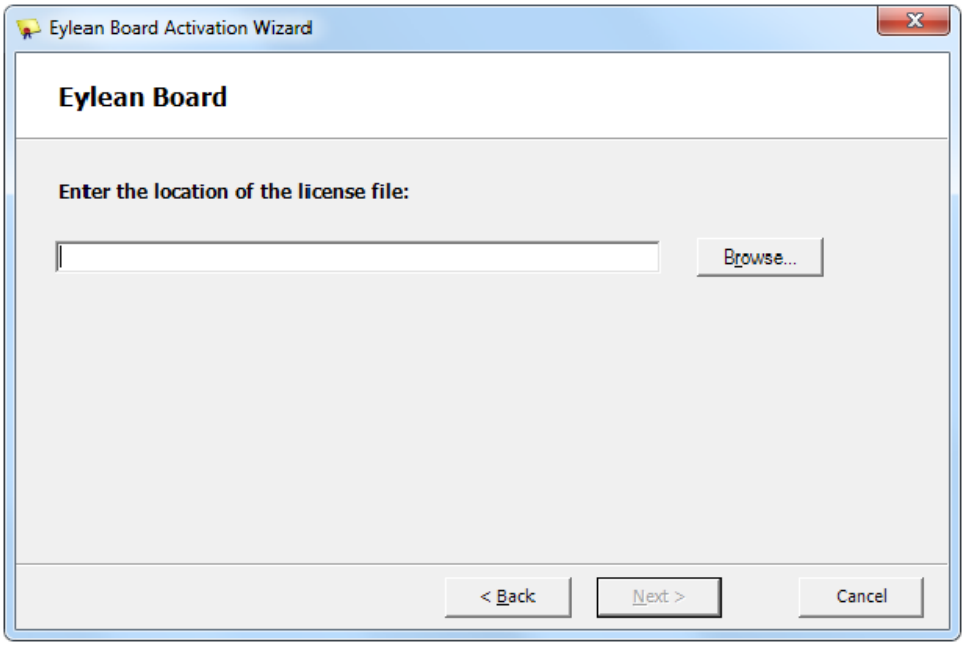


3. Copy the License Request Contents and send them to your software vendor by email (support@eylean.com). Click **Finish**.



4. When you receive a license file, save it to the selected location on your computer. Open the Eylean Board application again and select the **I have a license file I want to install** option. Click **Next**.

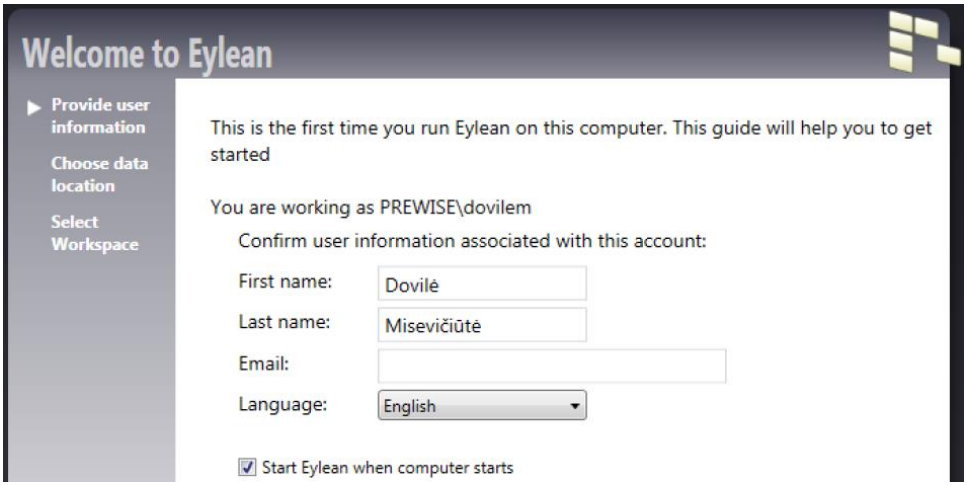
5. Select **Browse** to enter the location of the license file. Click **Next** to start the license installation.



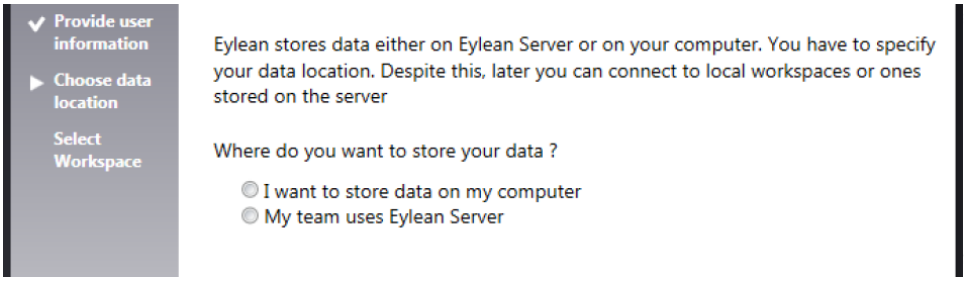
4. Get started

4.1. Get started

1. Open the **Eylean Board** application from your computer.
2. The **Welcome to Eylean** screen opens. Provide user information. Enter your first and last name into the text fields.

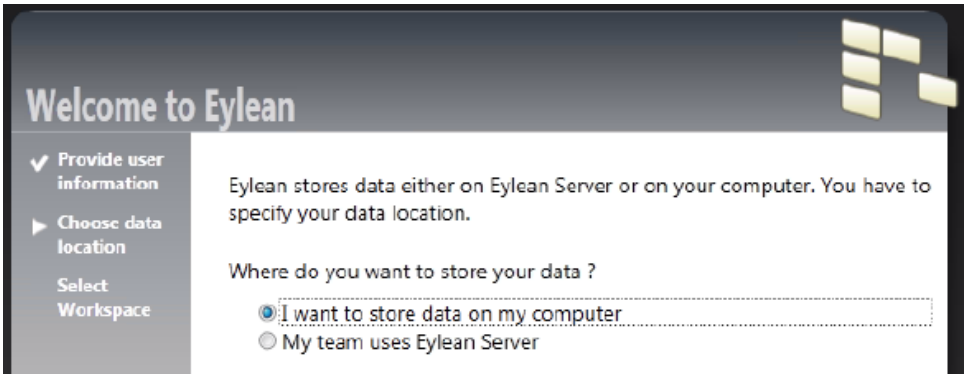


3. Specify where you would like to store your data.



A. The following guidelines helps you to get started when you choose to **store data on your computer**:

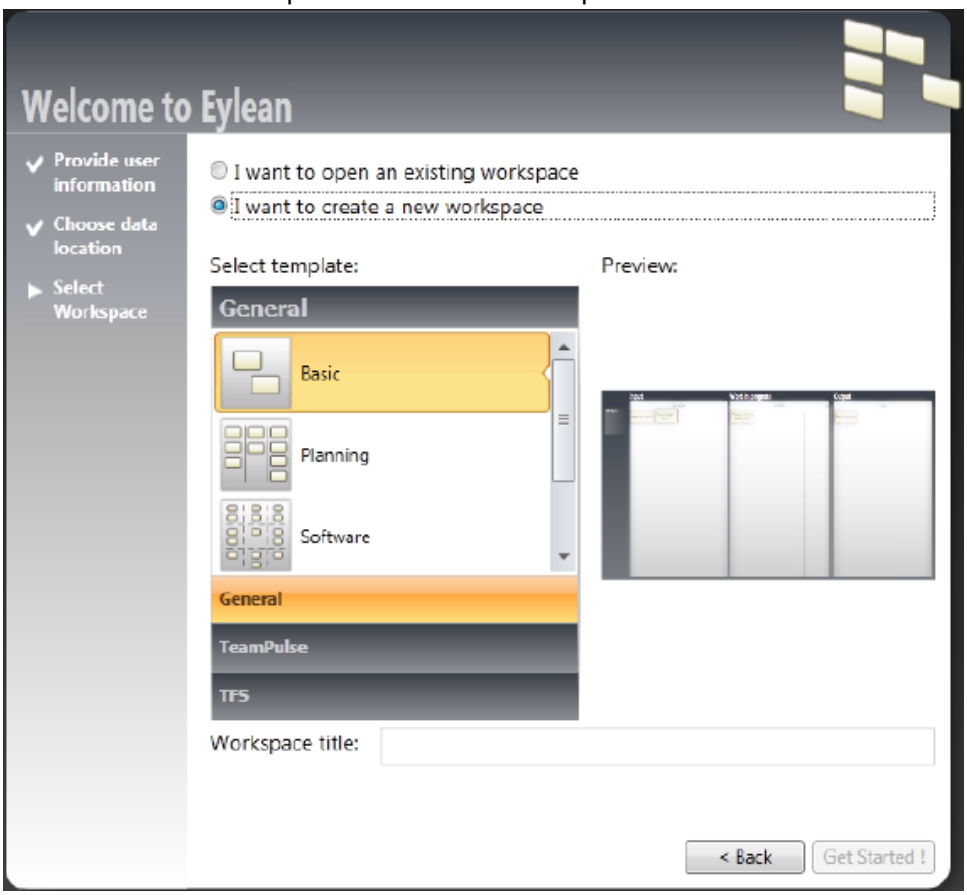
1. Select I want to store data on my computer and click **Next**.



2. Select **I want to create a new workspace**.

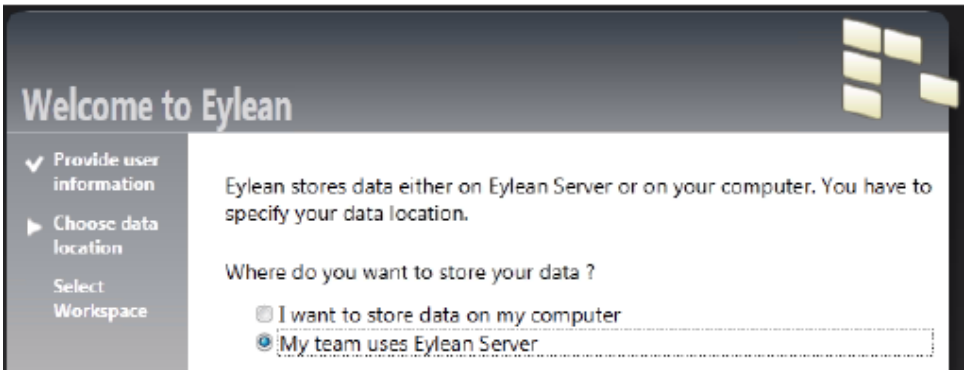
Note! The option **I want to open an existing workspace** will be active after you have used the Eylean Board application at least once and already created a workspace located on your computer.

3. Name the new workspace and select a template from the list. Click Get Started!

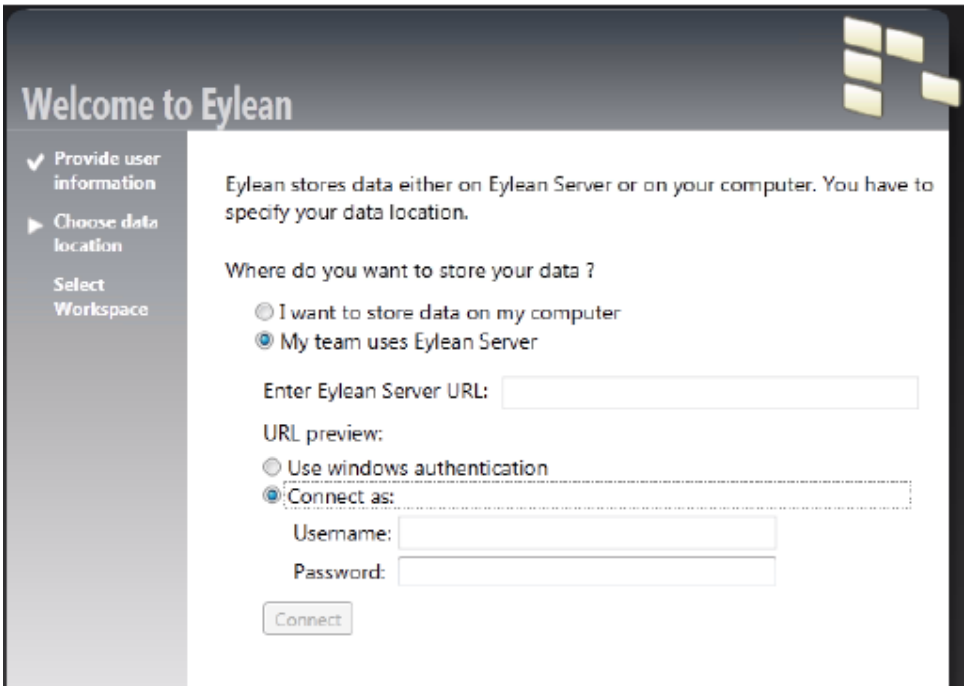


B. The following guidelines helps you to get started when you choose to **store data on an Eylean server**:

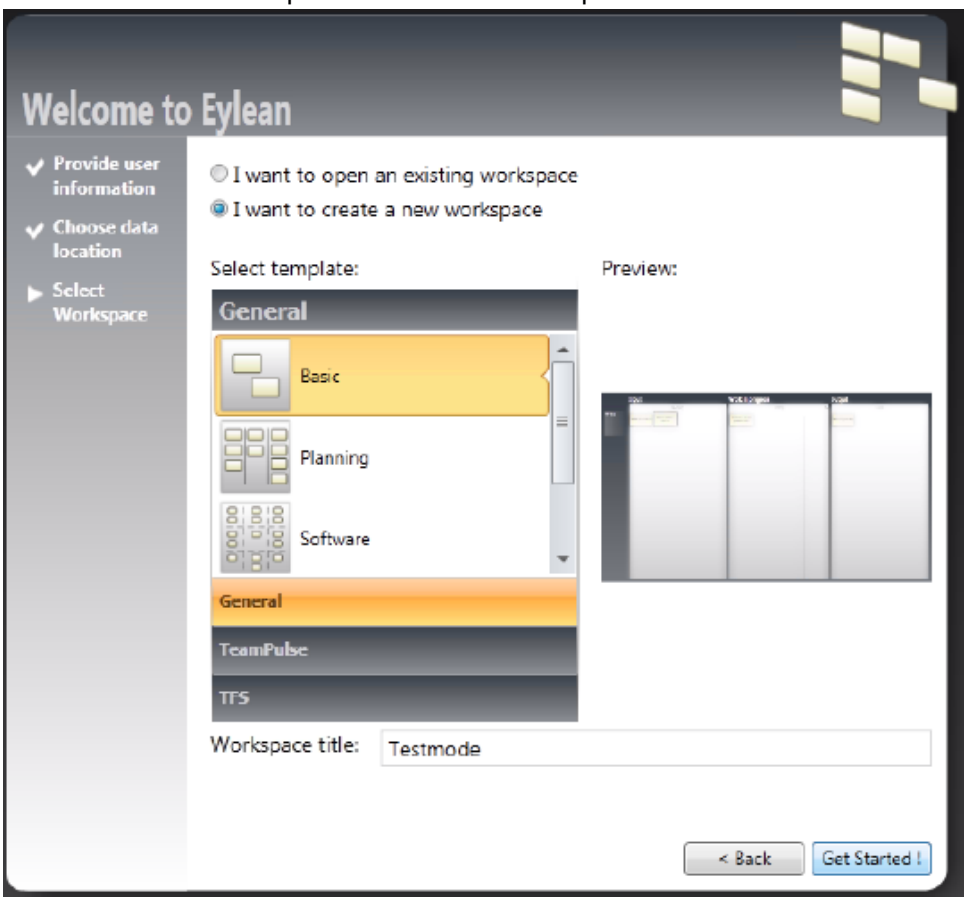
1. Select **My team uses Eylean Server**.



2. Provide the necessary information into the text fields to store data on an Eylean server. Click **Connect**.

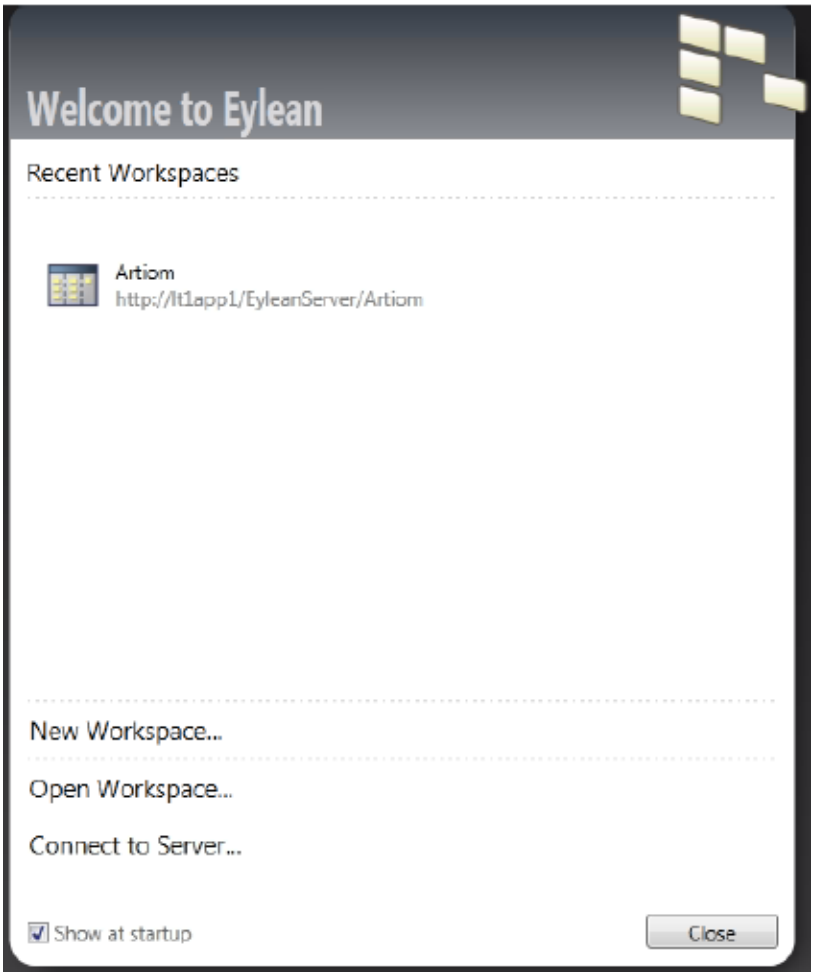


3. Name the new workspace and select a template from the list. Click **Get Started**!



4.2. Create a New Workspace

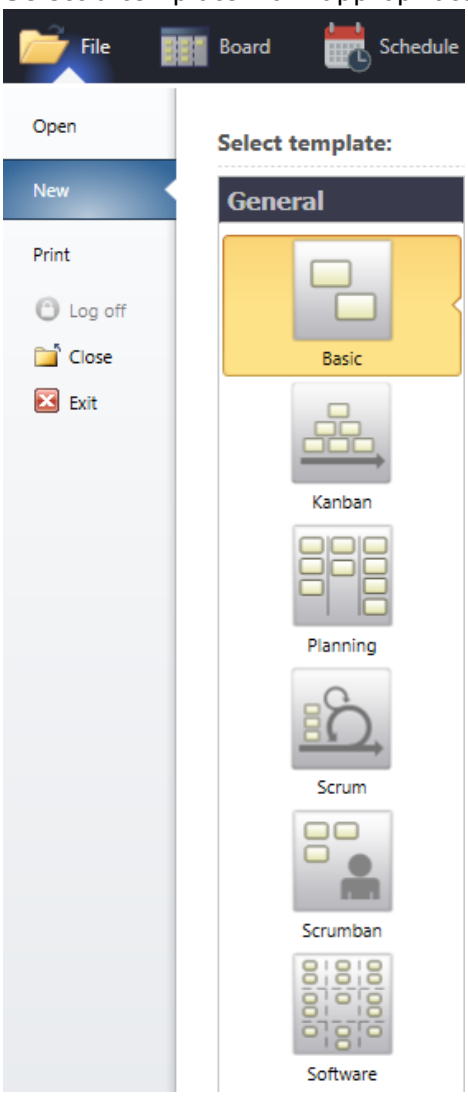
1. To start creating a new workspace, open the **Eylean Board** application from your computer. Click **New Workspace**....



Note! Check the **Show at startup** box to start the application with this window.

2. If the Eylean Board application is already opened, select **File > New**.

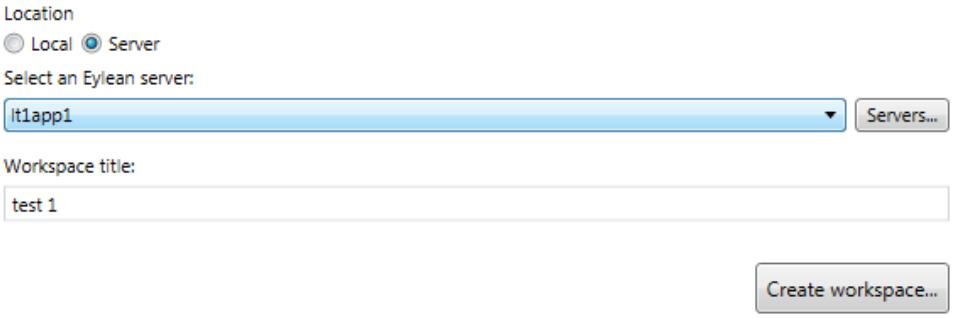
3. Select a template from appropriate group.



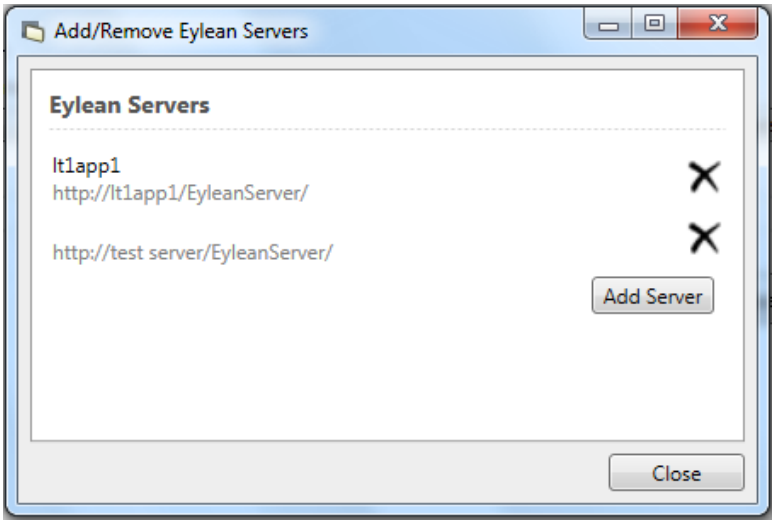
4. Select **Local** to locate the new workspace on your computer. Name your workspace and click **Create workspace**.

5. To create a workspace located on the Eylean server, check the appropriate radio button.

6. Select a server from the drop-down list.



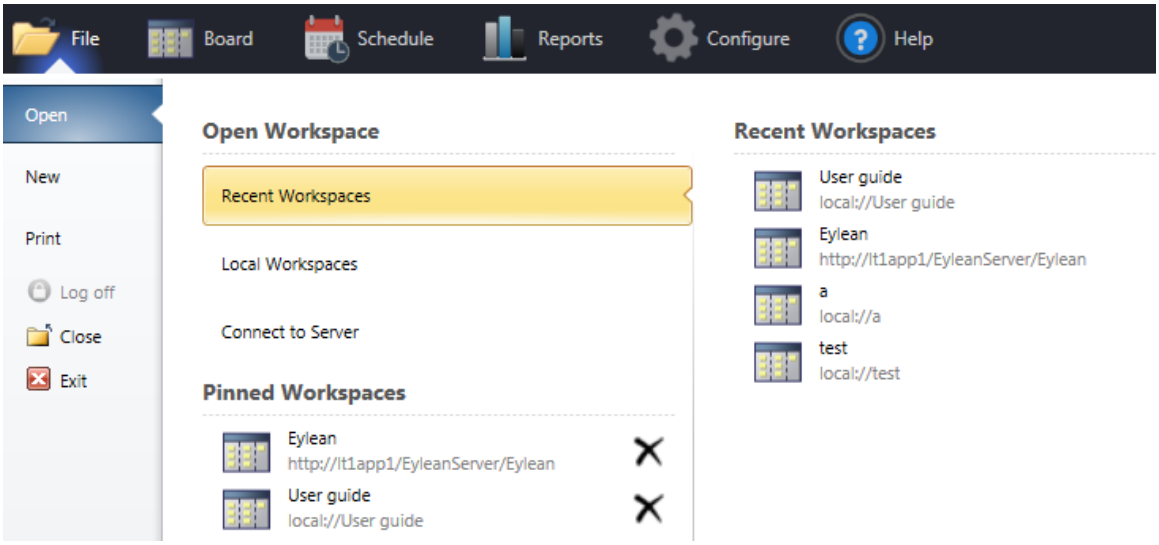
7. Or click **Servers > Add Server > Add** to define a different server.



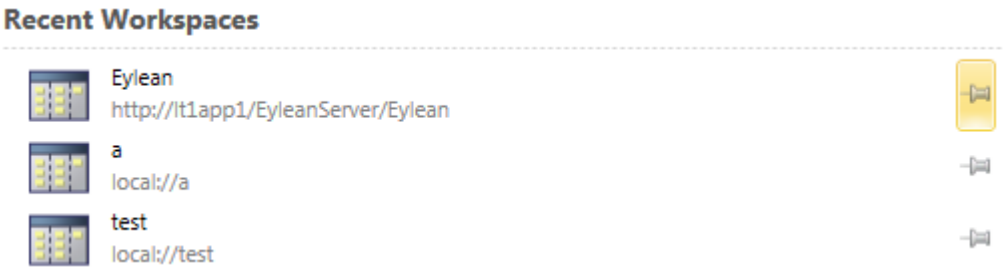
8. Finally, name the workspace and click **Create workspace**.

4.3. Pin a Workspace

1. To get workspaces located faster, Eylean has the **Pinned Workspaces** area.



2. Pin your workspaces by clicking the **Pin** icon.

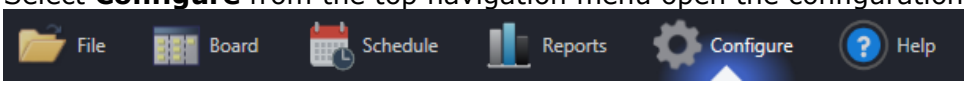


Note! The pinned workspaces also will appear on the welcome screen.

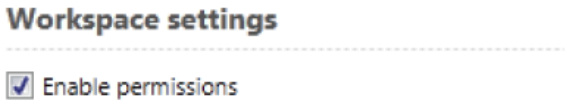
5. Configuration Menu

5.1. Workspace Configuration

1. Select **Configure** from the top navigation menu open the configuration window.



2. Check the Enable permissions box to enable different permission levels on editing workspaces



- Security in server scope. Eylean server can have user authorization enabled by defining parameter in web.config file:

a. Open **Web.config** file with any text editor available.

b. Add new configuration section definition.

```
<configSections>
    <sectionGroup name="applicationSettings"
    type="System.Configuration.ApplicationSettingsGroup, System,
    Version=4.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" >
            <section name="EyleanServerApplication.Properties.Settings"
            type="System.Configuration.ClientSettingsSection, System,
            Version=4.0.0.0, Culture=neutral,
            PublicKeyToken=b77a5c561934e089" requirePermission="false" />
    </sectionGroup>
</configSections>
```

c. Add ForcePermissions setting under application **Settings tag**.

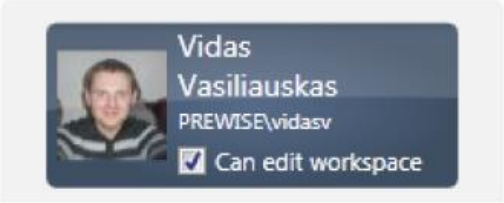
```
<applicationSettings>
    <EyleanServerApplication.Properties.Settings>
    <setting name="ForcePermissions" serializeAs="String">
            <value>True</value>
    </setting>
    </EyleanServerApplication.Properties.Settings>
</applicationSettings>
```

User access on server is defined by server permission status and user role on server.

	ForcePermissions=True	ForcePermissions=True
Connect to server	Anyone with valid domain account	Anyone with valid domain account
Create workspace	Administrators	Anyone with valid domain account
Delete workspace	Administrators	Administrators
See workspace listing	Anyone with valid domain account	Anyone with valid domain account
Manage server users	Administrators	Administrators
Manage administrators	Server root administrator	Server root administrator

- Security in **workspace** scope. Eylean can support different access permissions to particular workspace:

a. After enabling permissions on workspace in Configure workspace menu, Add team members that will be valid workspace members (read or write access). For more info about adding team members, check here.
b. Define which team members can edit workspace and which ones can only view it.

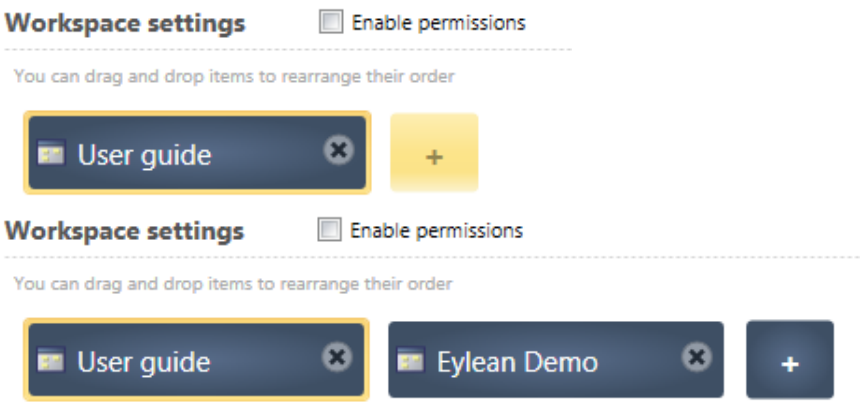


Note! Server administrators will be able to view workspace and edit it as well, so they do not have to be among the team members or have edit workspace permission on.

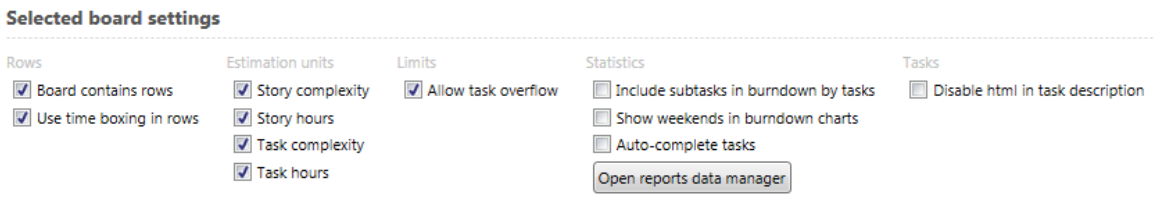
User access on workspace is defined by permission status and user role on server:

	Enable permissions= checked	Enable permissions= unchecked
Open workspace	Administrators and users with read permissions on workspace	Anyone with valid domain account
Edit workspace	Administrators and users with write permissions on workspace	Anyone with valid domain account
Mane workspace members	Administrators and users with write permissions on workspace	Anyone with valid domain account

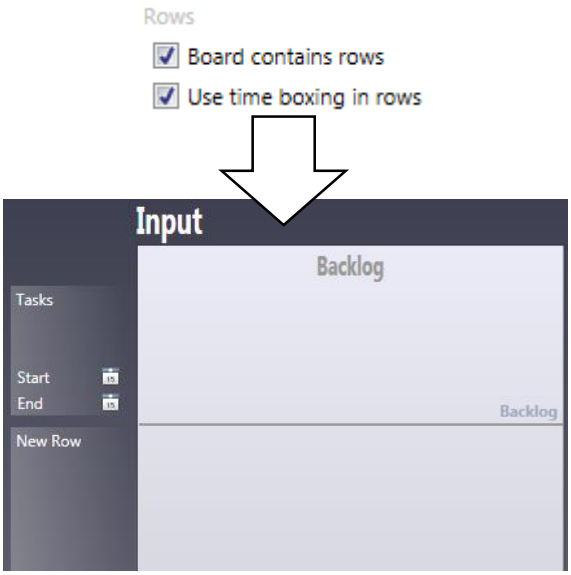
3. Click **+** at the top of Workspace Configuration to add one more boards to the existing workspace.



4. Manage the following features in the **Board settings** section:

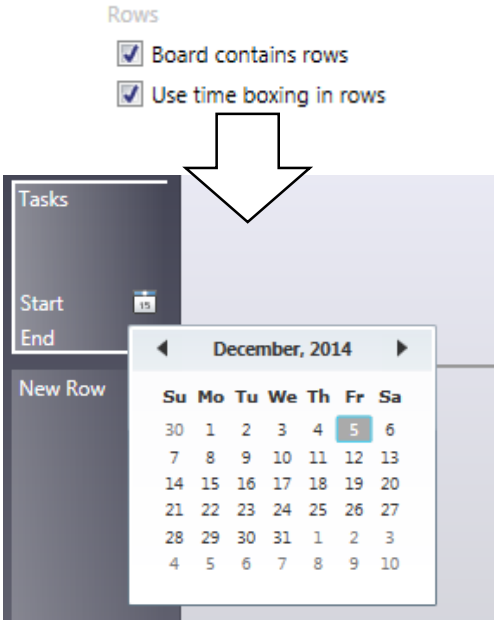


- Check the **Board contains rows** box to have several rows on the board. Rows allow you to group your tasks into groups that can be called goals, iterations or sprints, depending on how you organize your work.



- If you use rows to represent different Sprints/Iterations – check **Use time boxing in rows** box. Then you will be able to select certain dates from a calendar.

Note! Make sure to check Use time boxing in rows box to see the Estimated Burndown path for each Sprint/Iteration. For more information about Burndown charts, please refer here.

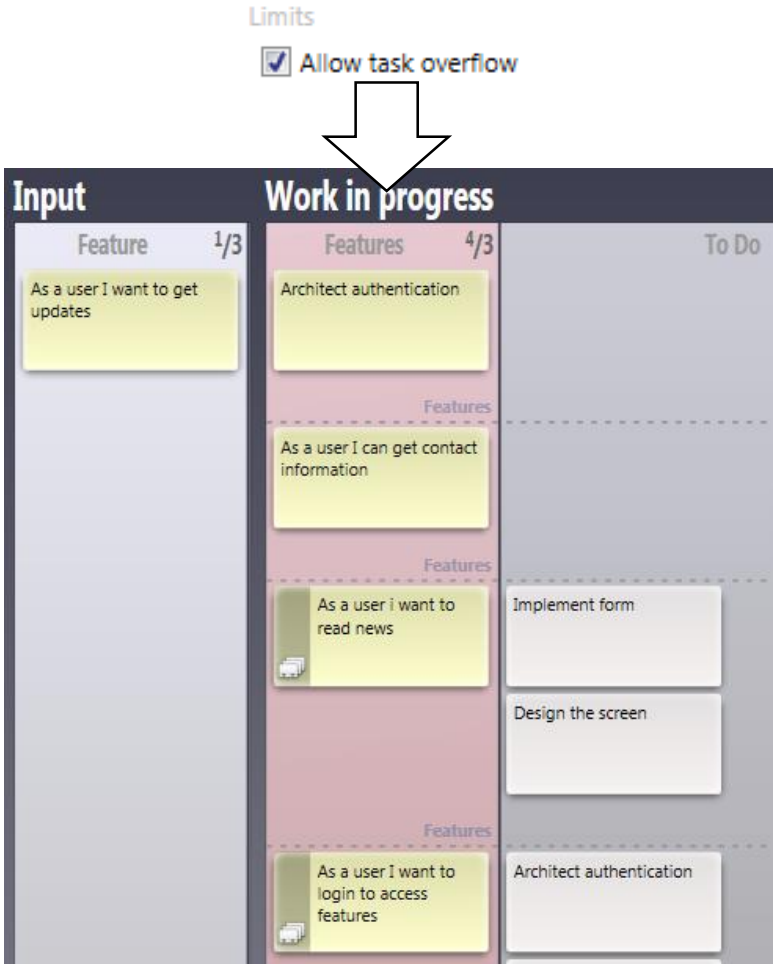


- Select the estimation units you are going to use for Tasks/Stories and Subtasks/Tasks. Estimation units are entered in the detailed task view. For more information about task estimation, please refer here.

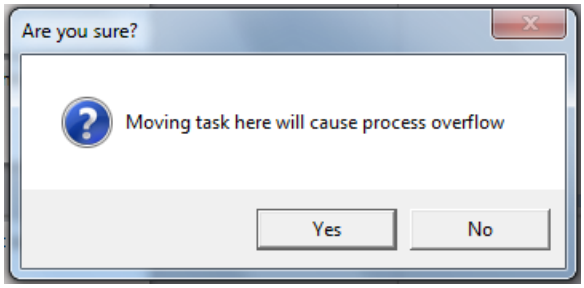
  Estimation units

  - [x] Story complexity
  - [x] Story hours
  - [x] Task complexity
  - [x] Task hours

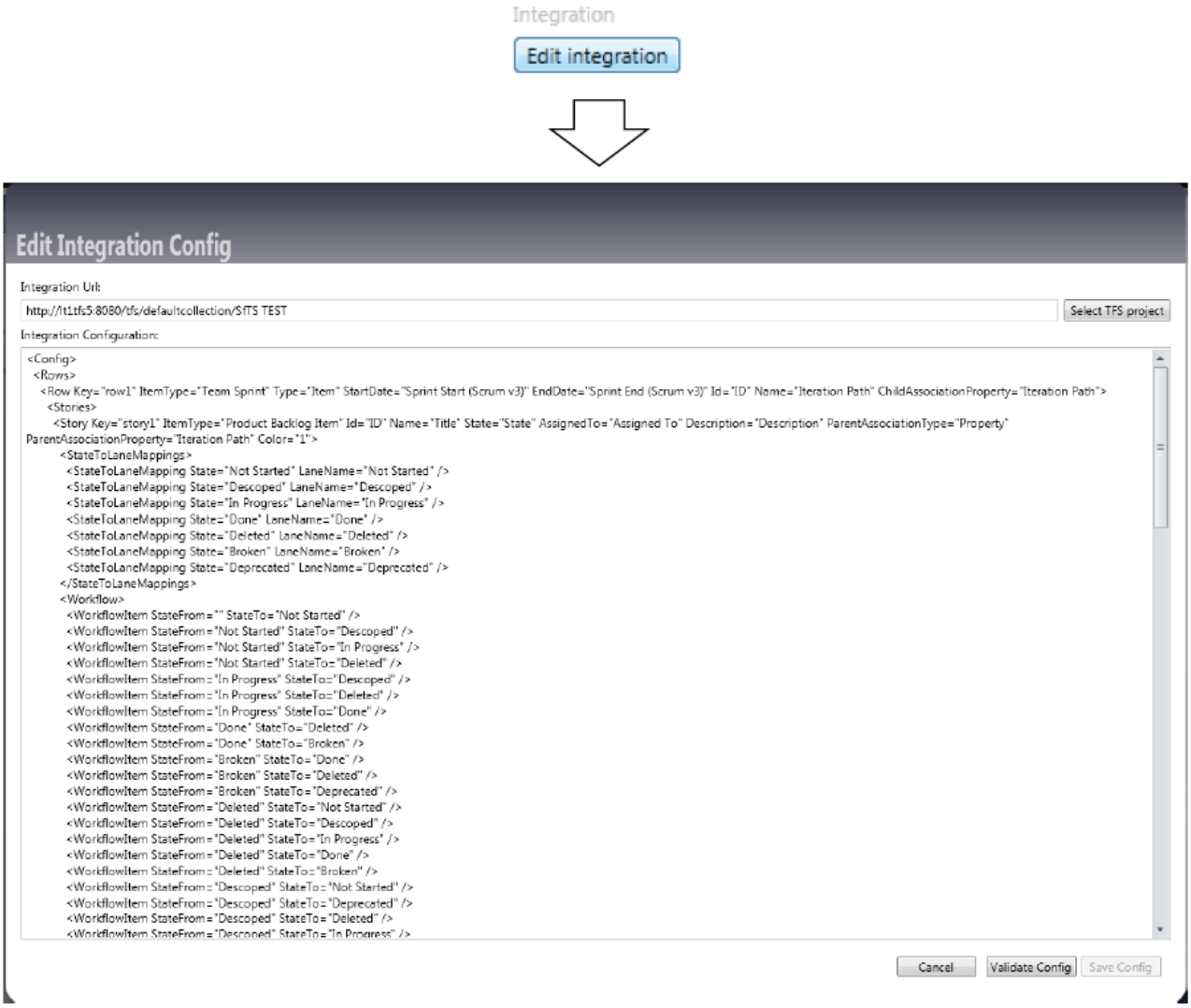
- If you decide to limit number of tasks in a certain column, chose whether to allow task overflow.
  Check **Allow task overflow** box to have more tasks in a specific column than its limit is. In this case, the column becomes red.



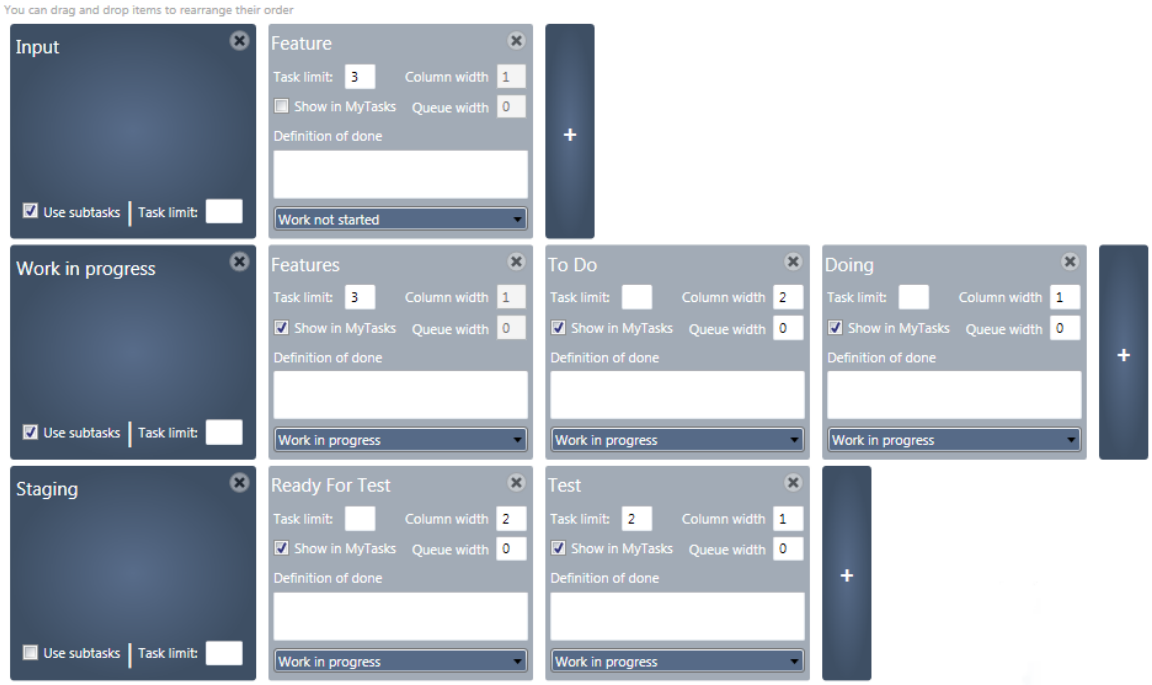
- If **Allow task overflow** box is left empty, Eylean Board doesn't let you put more tasks to the columns than its limit. When trying to exceed the limit, you will see notification. You will be able to add new task to the column only after removing one of the existing ones.



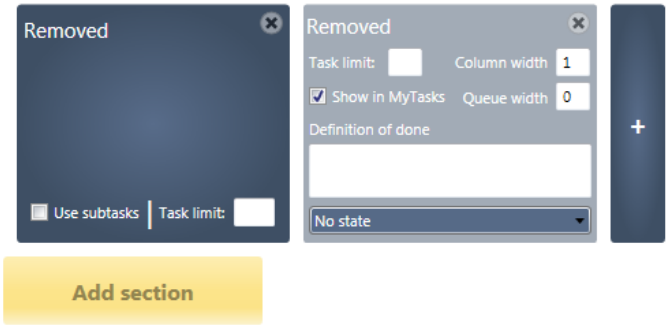
- Click **Edit integration** button to open the Integration configuration window and make adjustments to the TFS integration configuration.
  Note! This button is only active when Eylean is integrated with Microsoft Team Foundation Server (TFS).



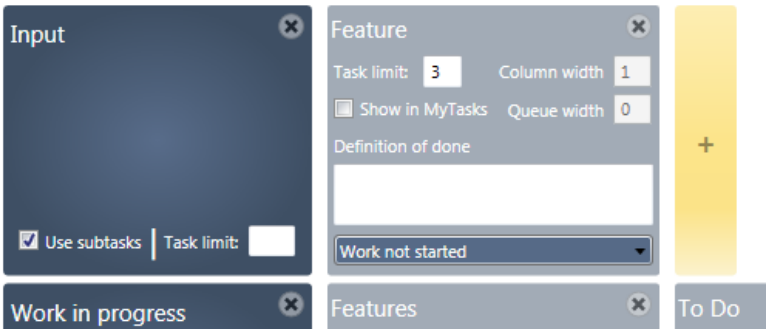
5. The lowest **Board settings** area is for modifying the structure of the board:



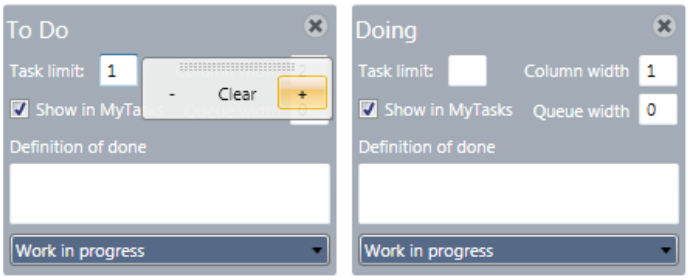
- Click **Add section** to add additional Sections to the board.



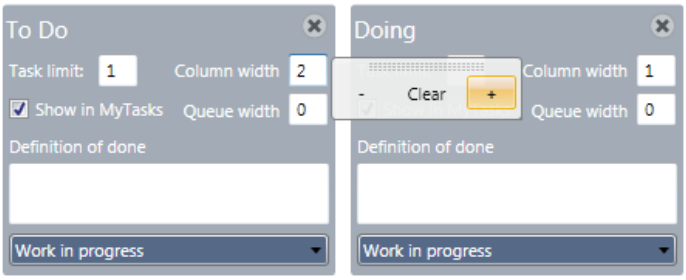
- Click **+** button add additional Columns.



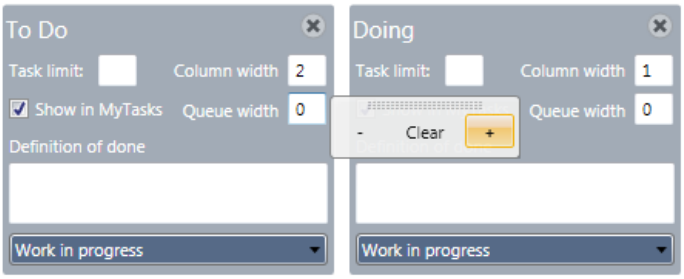
- Enter a number by hand or use **+ and –** buttons to define task limit.



- Enter a number by hand or use **+ and –** buttons to define the width of the column.

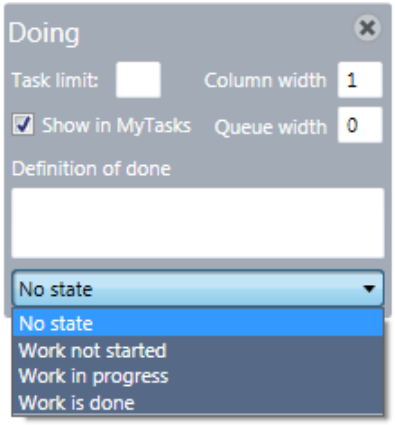


- Enter a number by hand or use **+ and –** buttons to define the width of the queue column.



- Check the **Show in My Tasks** box to see all your tasks in the **My tasks** Tab or in the taskbar of your computer.

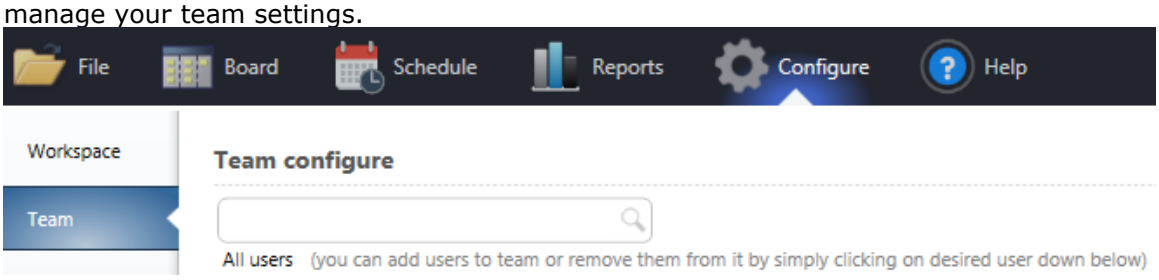
- Manually set the state for each column.



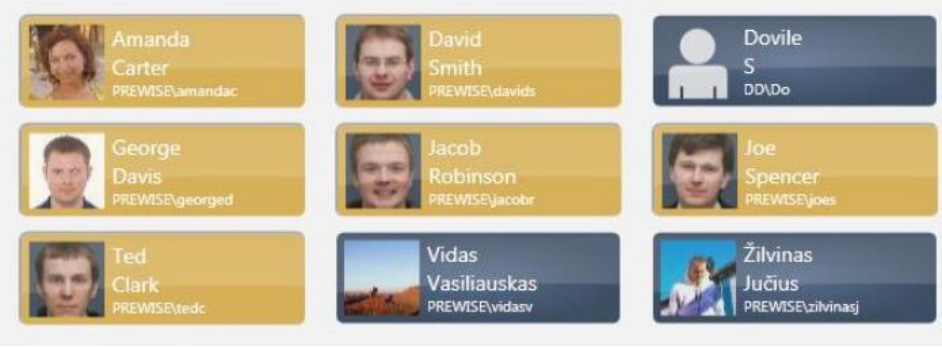
Tip! This is especially useful for TFS users, as they can clearly visualize the process on Eylean Board by setting the same state for several columns.

5.2. Team Configuration

1. Select **Configure** in the Board view and then select **Team** from the menu on the left hand side to manage your team settings.

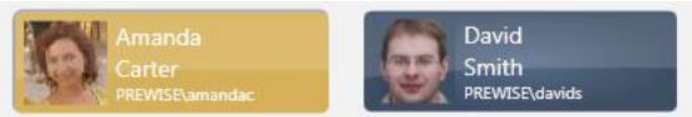


2. The **Team configure** view is divided into two areas.
   - All the users that are added to Eylean Server. For more information about adding users to Eylean Server, please refer here.



   - A list of assigned team members.

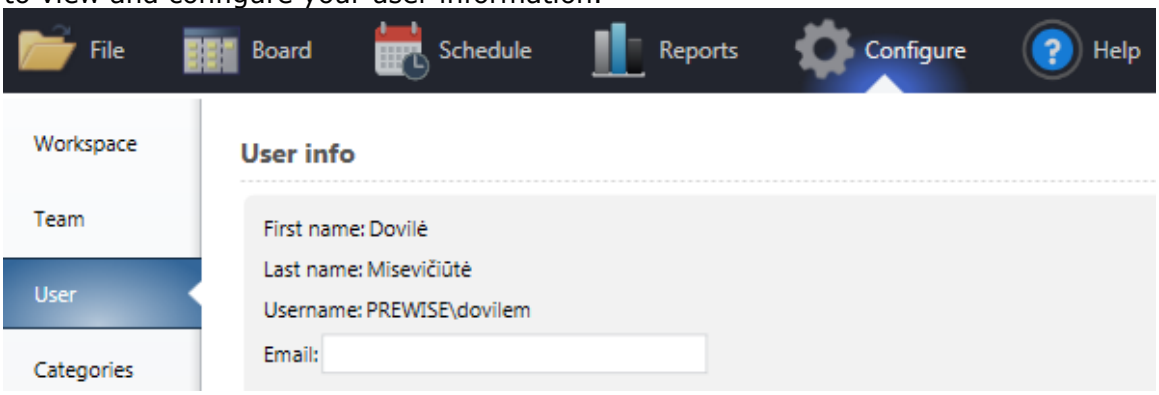
3. To add a particular member to your team, click once on the selected user in the all users list. The user card, which is assigned, is indicated in yellow.



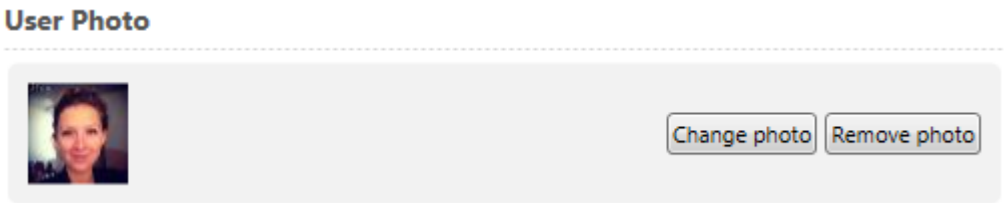
4. To remove a member from the team click once on the highlighted user again.

5.3. User Configuration

1. Select **Configure** in the Board view and then select **User** from the menu on the left hand side to view and configure your user information.

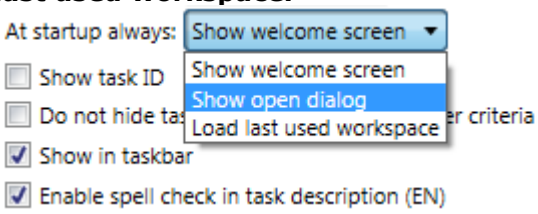


2. The **User photo** area allows insert a picture which will be shown on all task cards assigned to a particular user.
3. To change user photo click **Change photo** and follow the onscreen instructions.
4. To remove user photo click **Remove photo**.



5. In the **User settings** area you can:
   - Set inactivity timeout by entering the desired time period in the text field.

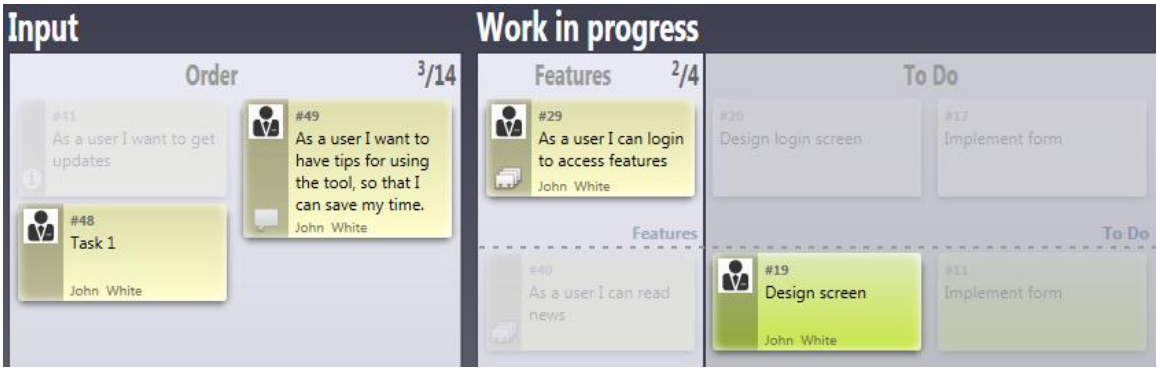
   - Select Eylean Board behavior at startup: **Show welcome screen**, **Show open dialog** or **Load last used workspace.**



   - Tick **Show task ID** box to see task ID numbers on tasks.

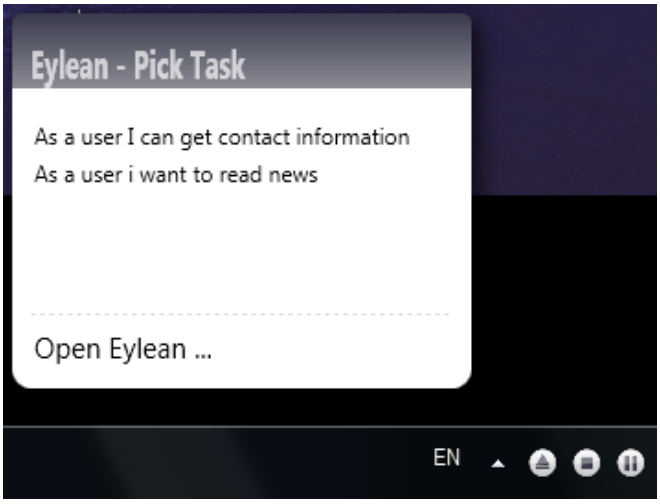
- Tick **Do not hide tasks that does not match filter criteria** box to see all the tasks in the board. The tasks that do not match the filter criteria, will be visualized less clearly.

  ☑ Do not hide tasks that does not match filter criteria



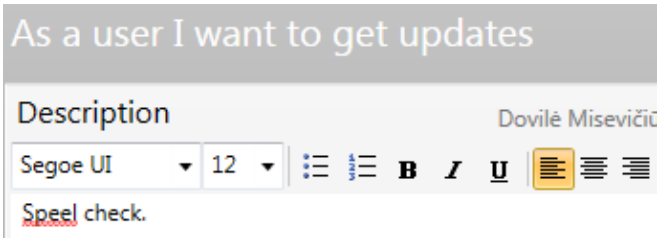
- Tick **Show in taskbar** box to access Tasks from Windows task bar and track them easily.

  ☑ Show in taskbar



- Tick **Enable spell check in task describtion (EN)** box for the task names to be spell checked automatically.

  ☑ Enable spell check in task description (EN)



- Tick **Auto upload file attachments when changed** box to have the attachments updated automatically every time you work on them.

  ☑ Auto upload file attachments after changed

- Tick **Auto assign new tasks** box to automatically assign new tasks you create to yourself.

  ☑ Auto assign new tasks

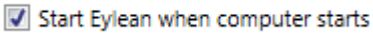
- Tick **prompt when new updates are available** box to get notifications about Eylean Board updates.

  ☑ Prompt when new updates are available

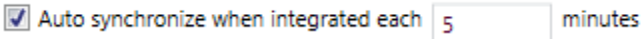
- Tick **Participate in Eylean experience improvement program** box to provide analytics data for the Eylean Team. This way we are able to analyze and improve your experience.

  ☑ Participate in Eylean experience improvement program

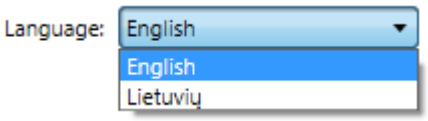
- Tick **Start Eylean when computer starts** box for Eylean to run automatically when computer starts.

- Tick **Auto synchronize when integrated each … minutes** box and choose the number of minutes you want Eylean to auto synchronize data with the integrated programs.

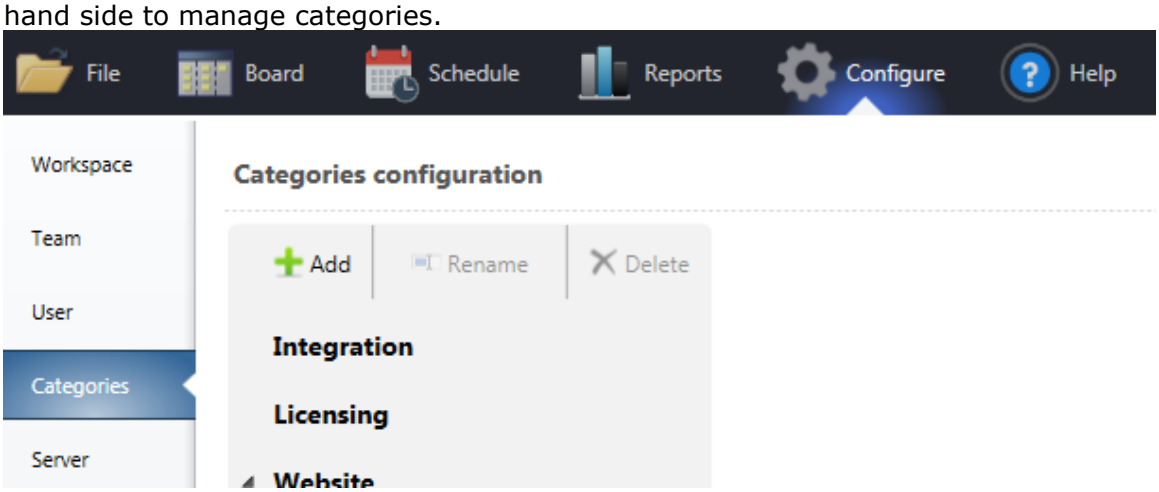
  

- Select Eylean Board language.

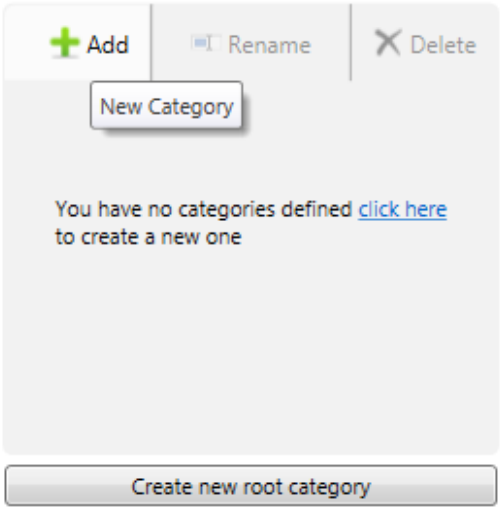
  

5.4. Categories Configuration

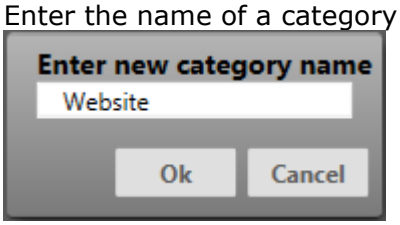
1. Select **Configure** in the Board view and then select **Categories** from the menu on the left hand side to manage categories.



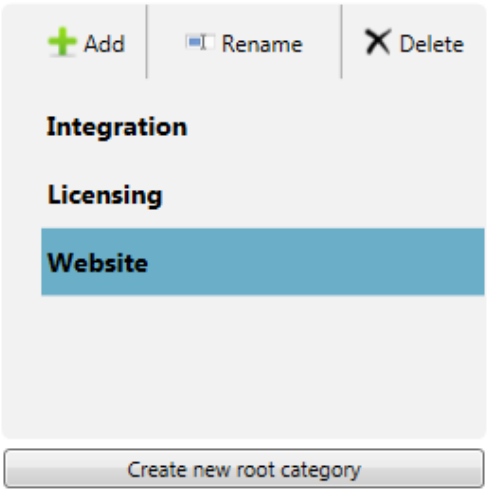
2. Click **Add** to add the first category.



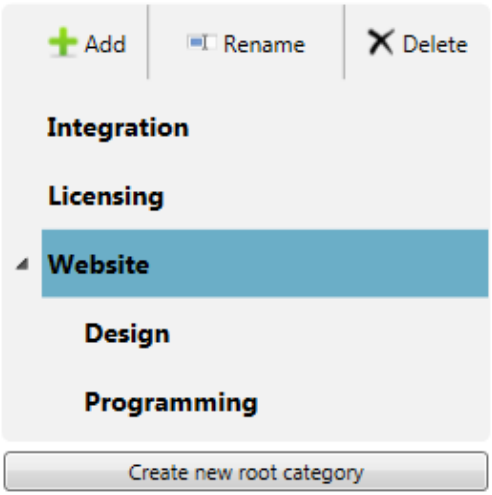
3. Enter the name of a category.



4. **Add** button adds root categories. Click on the name of a category at first to create second level categories for it.

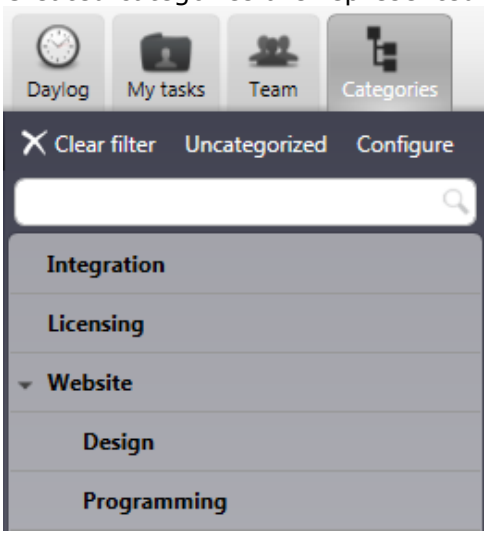


5. Add as many subcategories as you need.



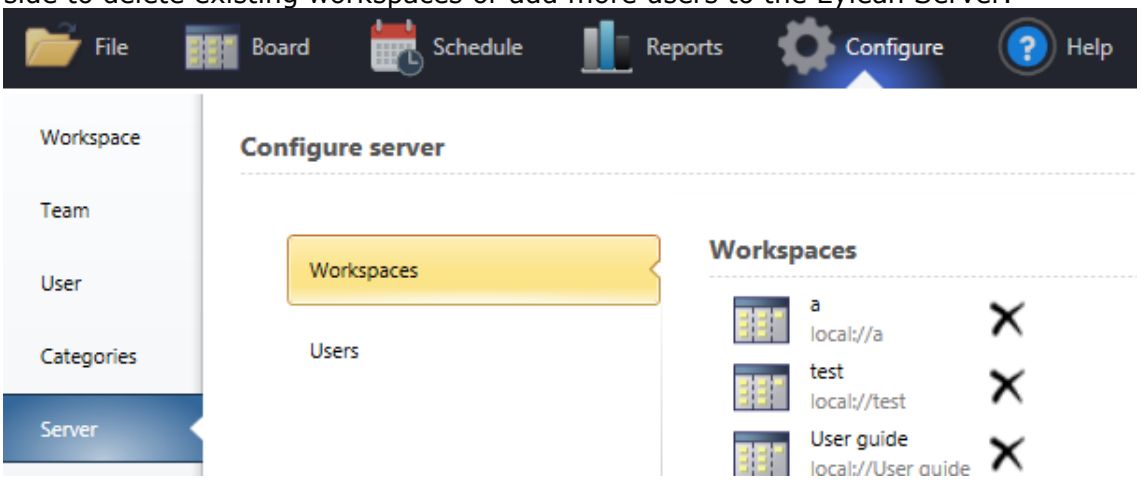
Tip! Use drag and drop to rearrange categories.

6. Created categories are represented in **Categories** tab in the Sidebar.



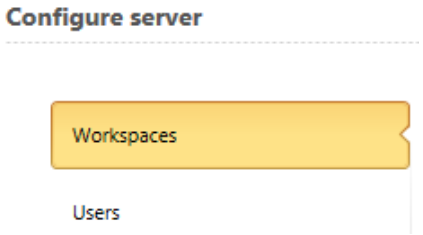
5.5. Server Configuration

1. Select **Configure** in the Board view and then select **Server** from the menu on the left hand side to delete existing workspaces or add more users to the Eylean Server.

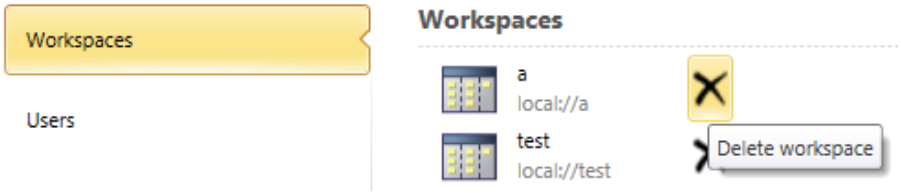


Note! These tasks can be performed only by a person who has administrative rights.

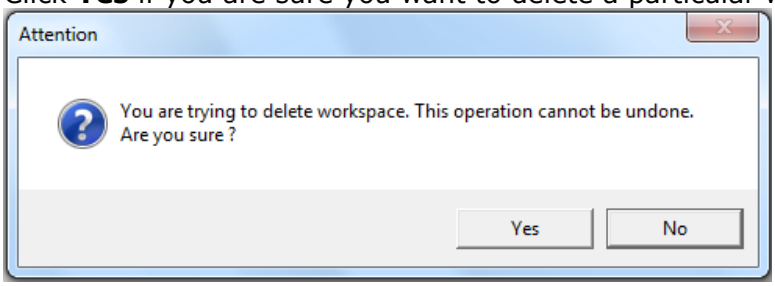
2. Select **Workspaces** to manage workspaces.



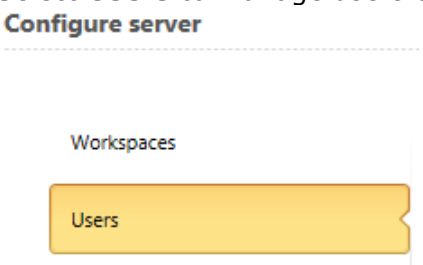
3. Click the **Delete workspace** to delete a selected workspace.



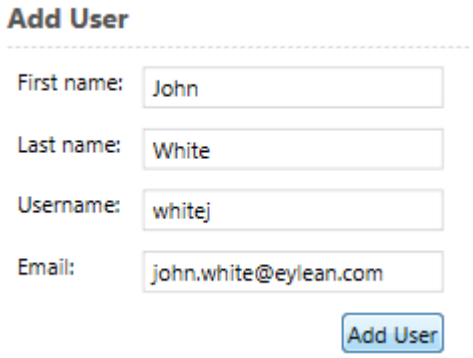
4. Click **Yes** if you are sure you want to delete a particular workspace. Otherwise, click **No**.



5. Select **Users** to manage users on Server.



6. To add a new user type in the necessary information into the text fields and click **Add user**.



7. Administrators can also change pictures for other users.

Note! The picture will be updated after you restart Eylean Board.

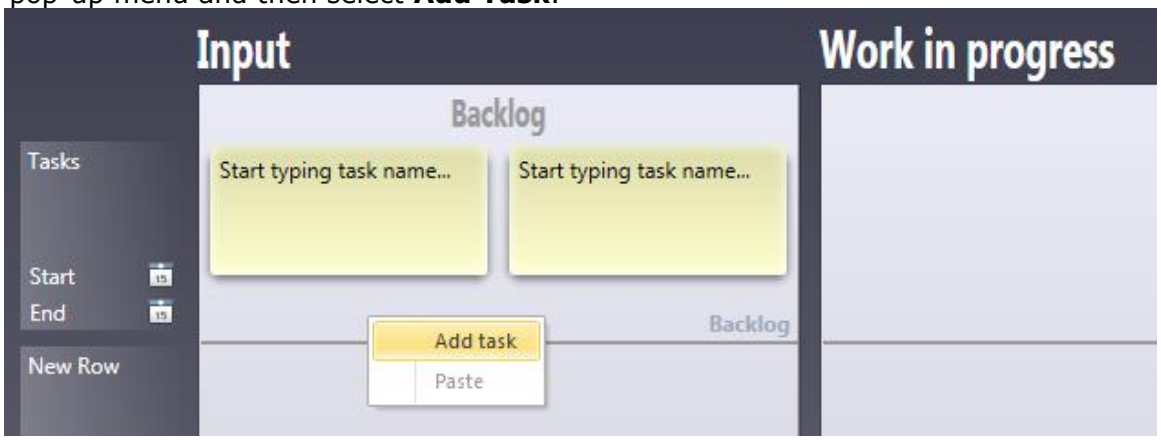
8. Click the **x** icon on the user's card to delete a user. Click **Yes** to delete the user completely.

9. As the main administrator, you can grant administrative rights to other user/users. Check the Administrator box on the user's card.

6. Features

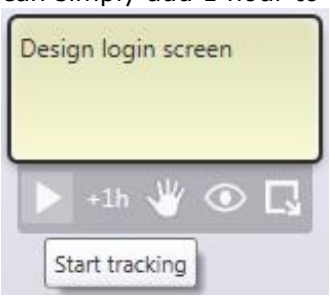
6.1. Task Card Management

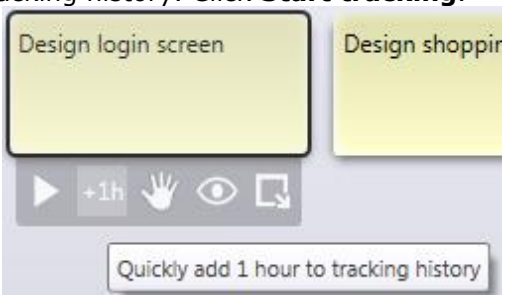
1. Double click on the board to create a new task card. Alternatively, right-click the board to open the pop-up menu and then select **Add Task**.



Tip! Rename a task card quickly and easily. Select the task card you want to rename and press **F2 function key** on your keyboard. The text area becomes blue: enter the desired title for your task card.

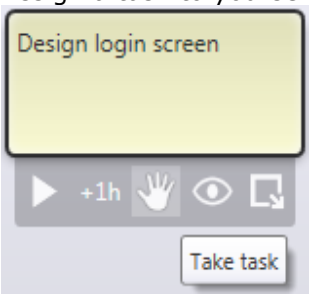
2. Click once on a task card to select it. This will open the pop-up menu. Here you can:
   - Start tracking the time you spend on a particular task. In case you forgot to start tracking, you can simply add 1 hour to tracking history. Click **Start tracking**.





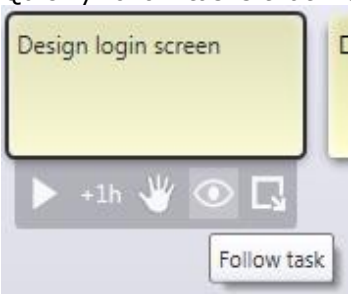
Note! To enable this feature, you must name the task card first.

   - Assign a task to yourself by clicking **Take task**.

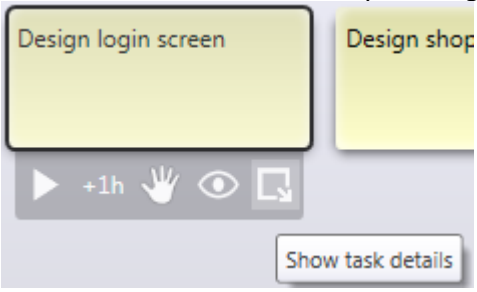


Note! This feature becomes available only when you add yourself to a team or you are added by someone else.

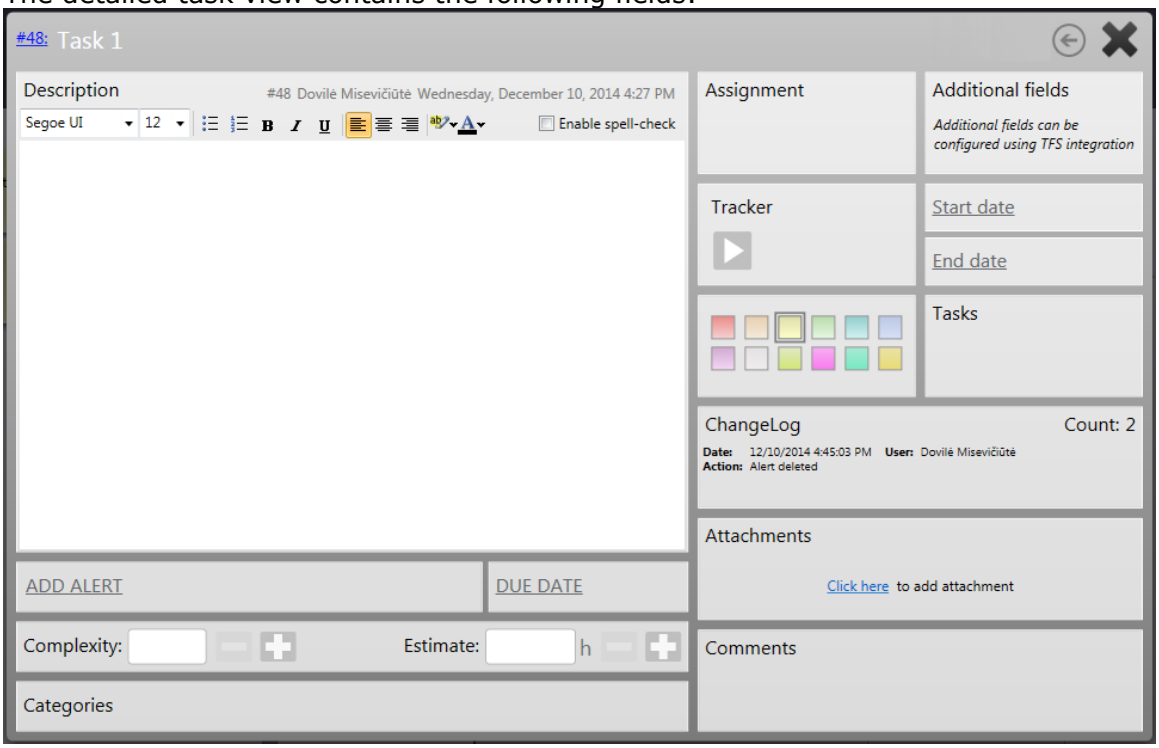
- Quickly follow tasks that interest you by clicking **Follow task**.



- See the detailed task view by clicking **Show task details** or double-clicking the task card.

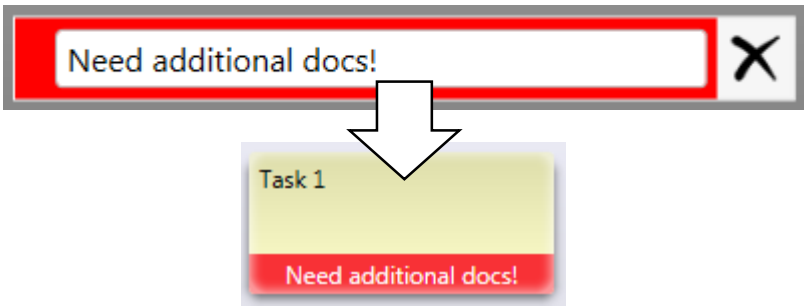


3. The detailed task view contains the following fields:

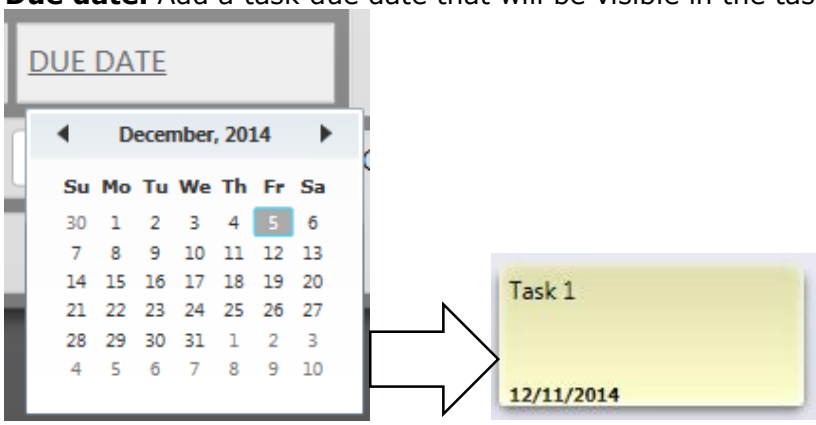


- **Title** (at the top of the task card).
- **Description.** Enter additional information about the task.

- **Alert.** Add text notification which will highlight task/user story's urgency or importance. Click **ADD ALERT**.



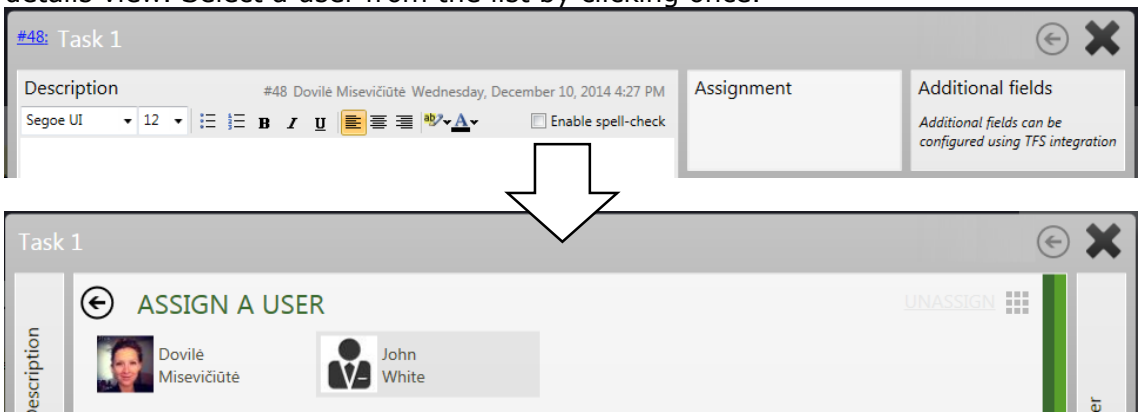
- **Due date.** Add a task due date that will be visible in the task window. Click **DUE DATE**.



- **Estimation.** Enter an abstract unit in the **Complexity** or **Estimation** field defining task/user story/etc. complexity. For more information about configuring estimation units, please refer to here.

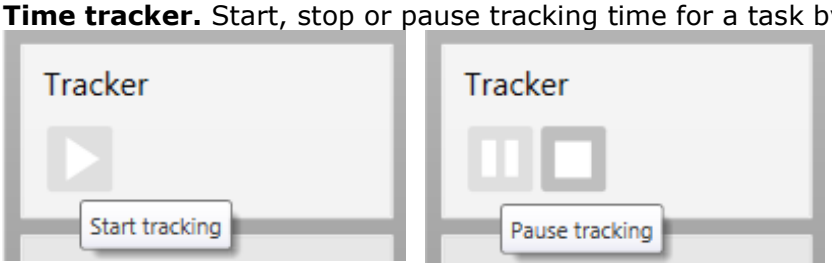
- **Categories.** Assign the task to a specific category. For more information about configuring categories refer here.

- **Assignment.** To access task assignment window click on the **Assignment** field in Task details view. Select a user from the list by clicking once.

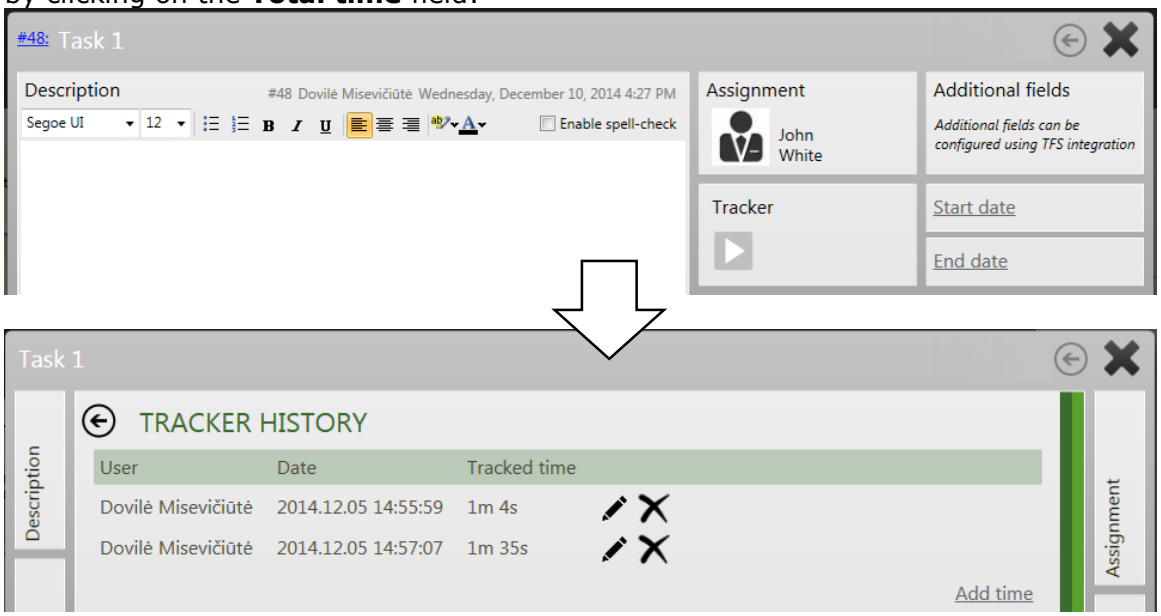


Note! If there are no workspace members, the Assign feature will not be available. To learn how to add members to a team, please refer here.

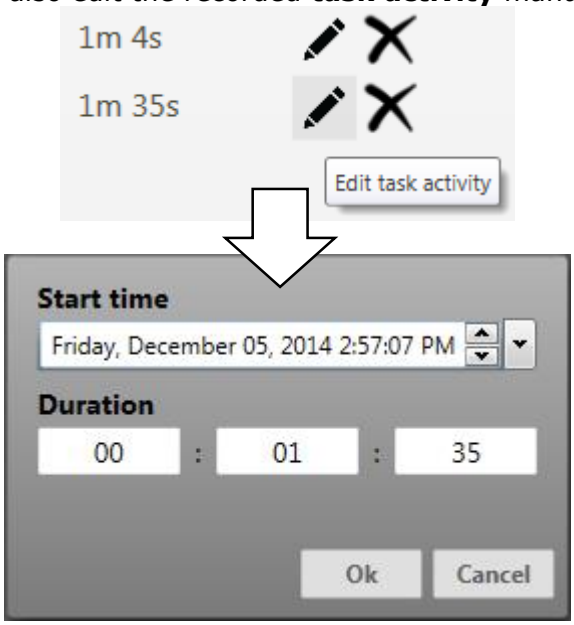
- **Time tracker.** Start, stop or pause tracking time for a task by clicking a specific button:



You can access **Tracker history** to check or edit tracking history data of a particular task by clicking on the **Total time** field:

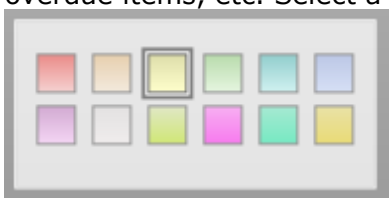


If you worked on a task and forgot to track its time, click **Add time** to enter its unrecorded time manually. You can also edit the recorded **task activity** manually.

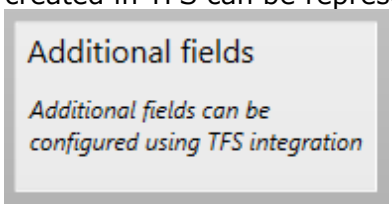


For more time tracking options, please refer here.

- **Color coding.** Choose different colors for the tasks to group them, set priorities, indicate overdue items, etc. Select a color from the color menu.

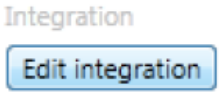


- **Additional fields.** This part of detailed task view is created for TFS users. Additional field created in TFS can be represented in Eylean Board as well.

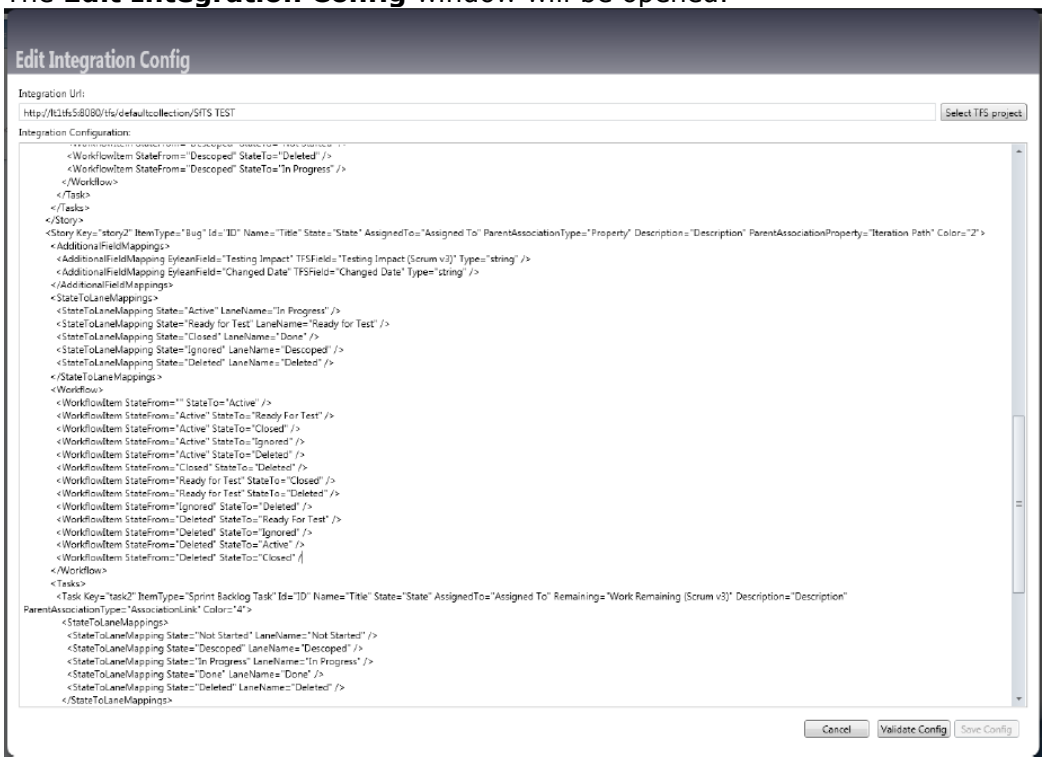


To manage Additional fields, select **Configure** in the Board view.

Select **Edit Integration** in the **Board settings**.



The **Edit Integration Config** window will be opened.



Describe Additional fields

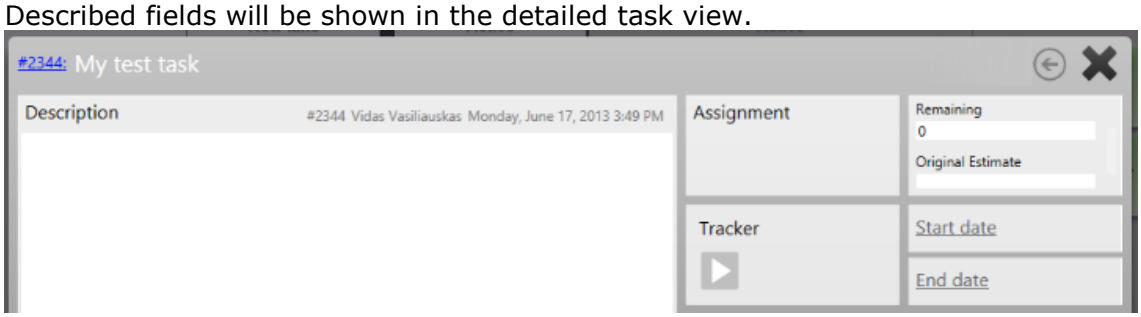
```
<AdditionalFieldMappings>
  <AdditionalFieldMapping EyleanField="Testing Impact" TFSField="Testing Impact (Scrum v3)" Type="string" />
  <AdditionalFieldMapping EyleanField="Changed Date" TFSField="Changed Date" Type="string" />
</AdditionalFieldMappings>
```

Check if the adjustments you made are correct by clicking **Validate Config**.

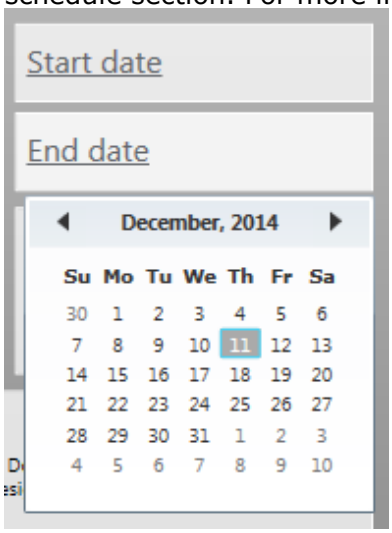
If there are some errors, you will receive a notification:

Story lane with name 'Not Started' doesn't exist in the board.
Tasks lane with name 'Descoped' doesn't exist in the board.
Story lane with name 'Ready for Test' doesn't exist in the board.

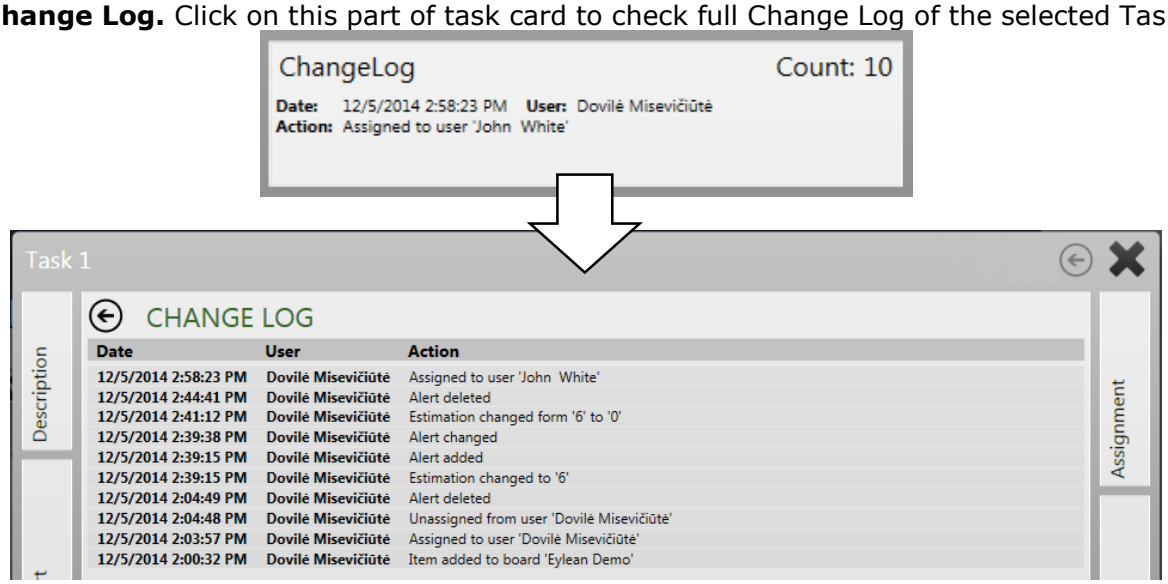
If there are no errors found, click **Save Config**.
Described fields will be shown in the detailed task view.



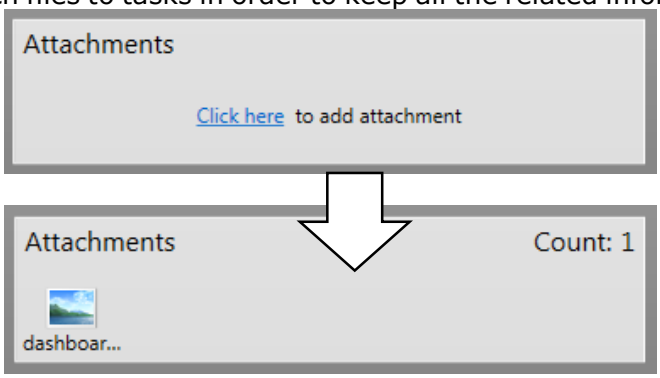
- **Start Date** and **End Date.** Define the start and end date of a task for it to be seen in the schedule section. For more information about schedule, please refer here.



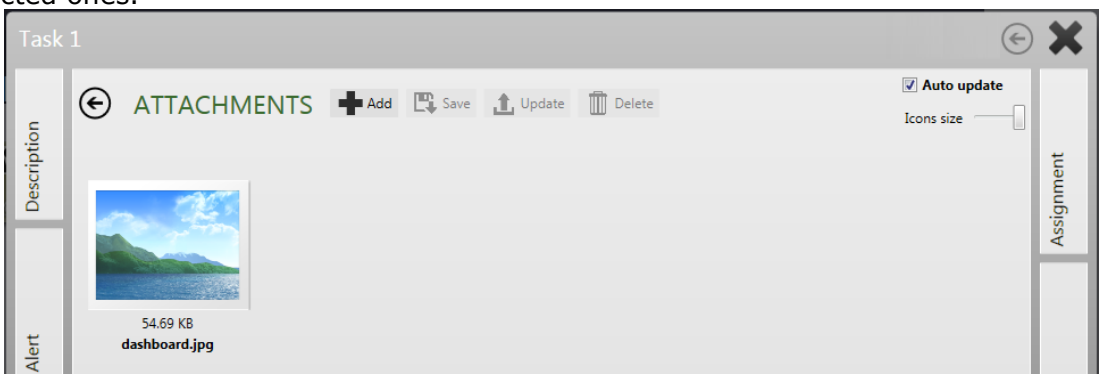
- **Change Log.** Click on this part of task card to check full Change Log of the selected Task.



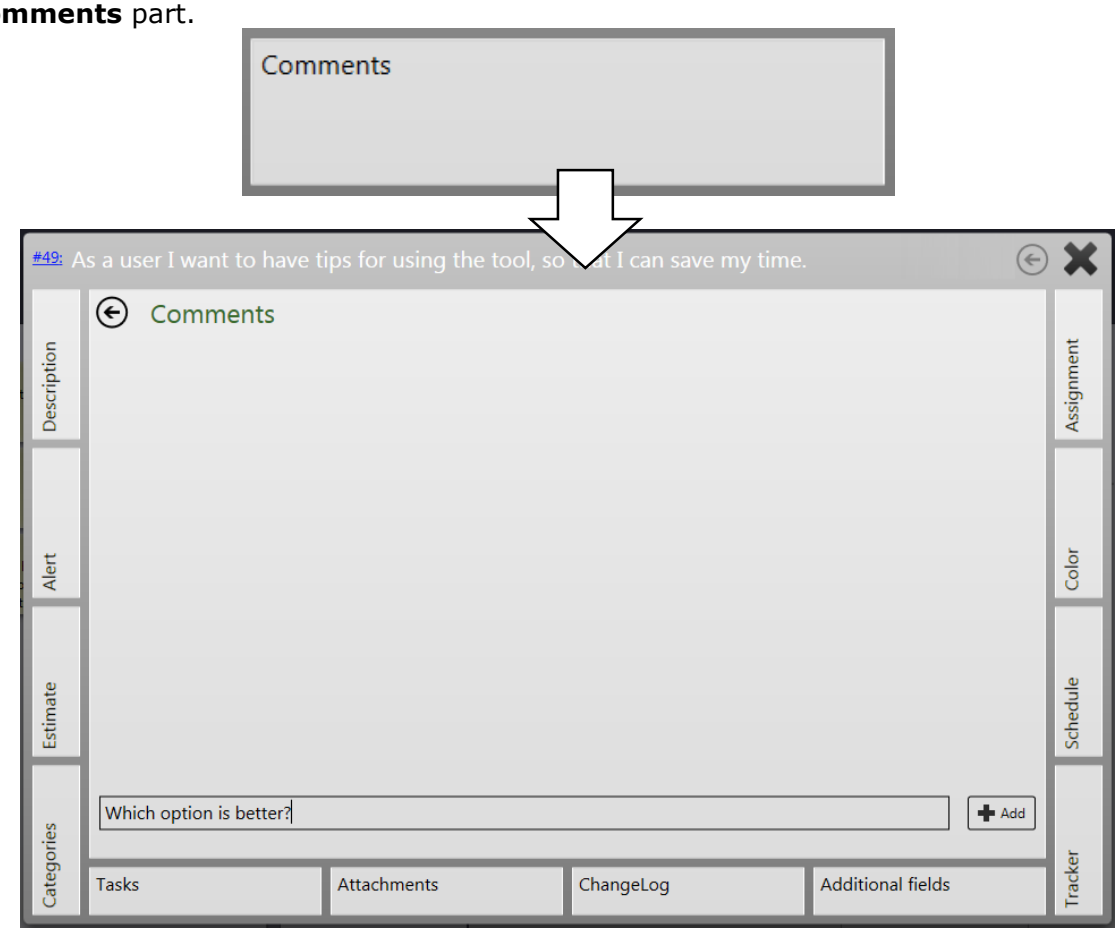
- **Attachments.** Attach files to tasks in order to keep all the related information in one place.



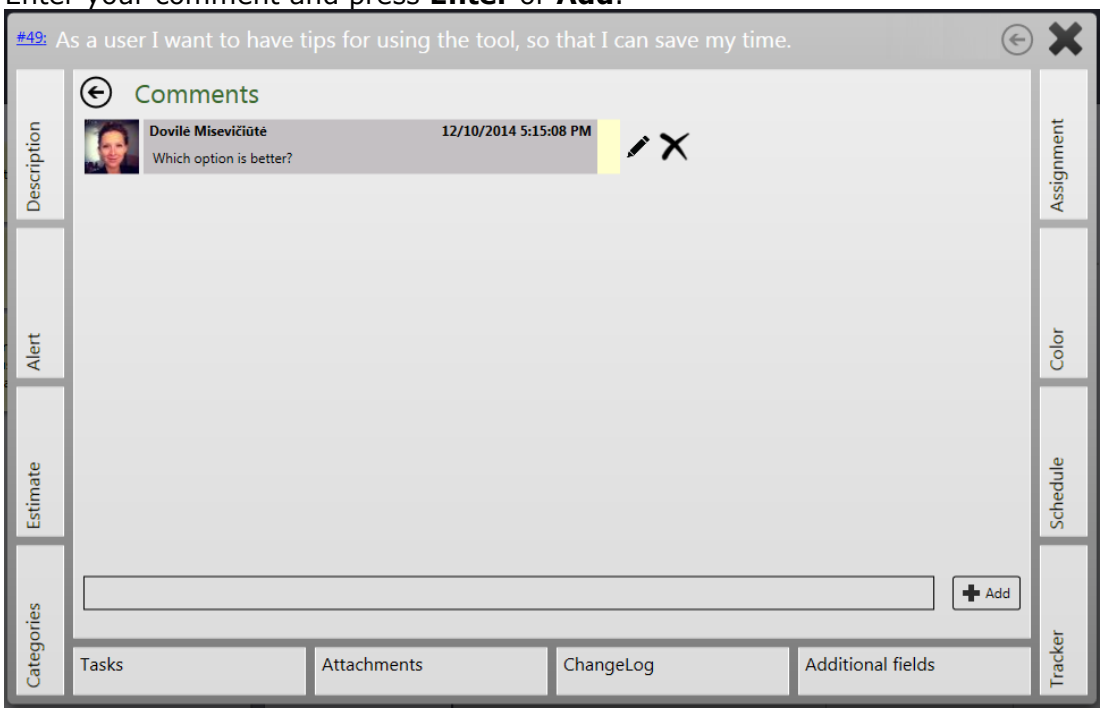
Click on **Attachments** to open a full view where you can **add** more files, **save** or **delete** selected ones.



- **Comments.** To ask questions about the task or share ideas related to it, click on the **Comments** part.

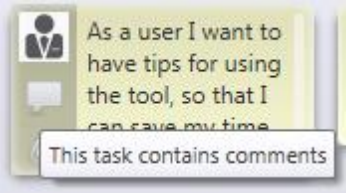


Enter your comment and press **Enter** or **Add**.

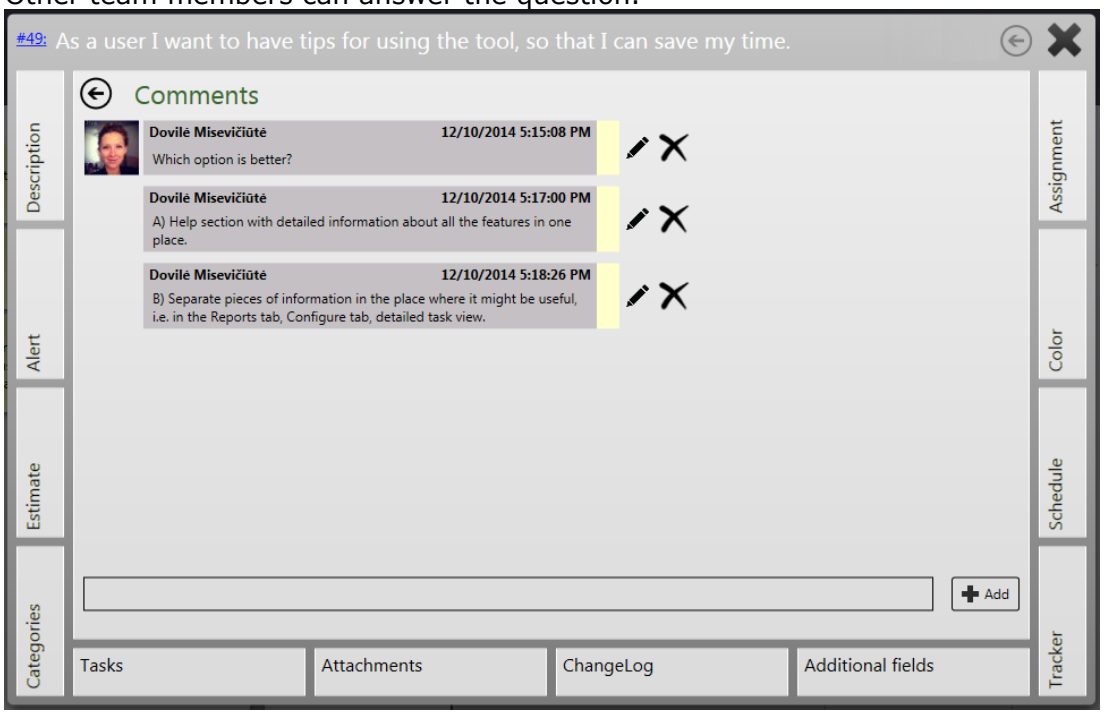


Note! Only users who are added to the team can add comments. For more information about team configuration, please refer here.

When a task is commented, a callout icon appears on the task card.



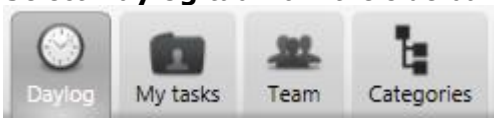
Other team members can answer the question.



6.2. Time Tracking

Keep track of the time you spend working on each task. Every workspace of Eylean Board has integrated time tracking feature.

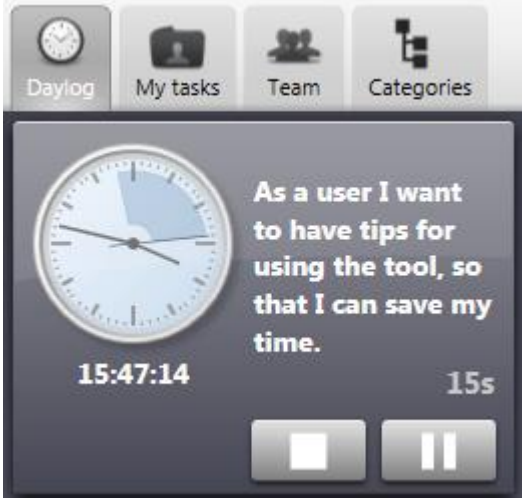
1. Select **Daylog** tab from the side bar menu in the board view.



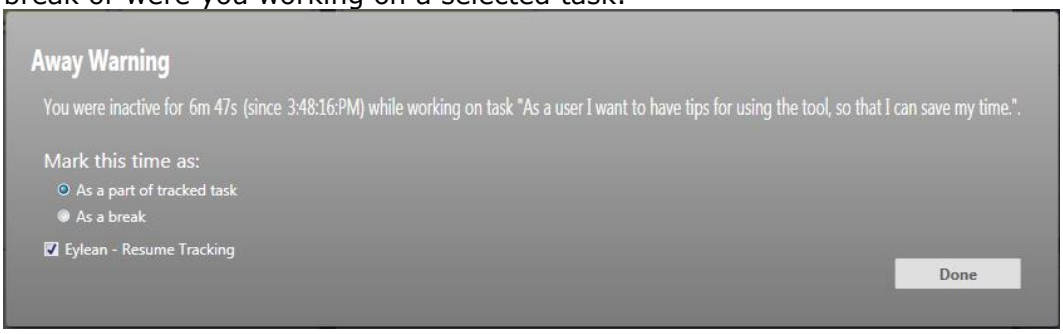
2. Drag and drop the task card on the clock icon **to start tracking** the time of a certain task.

Note! You can't drop tasks that are titled **Start typing task name...**

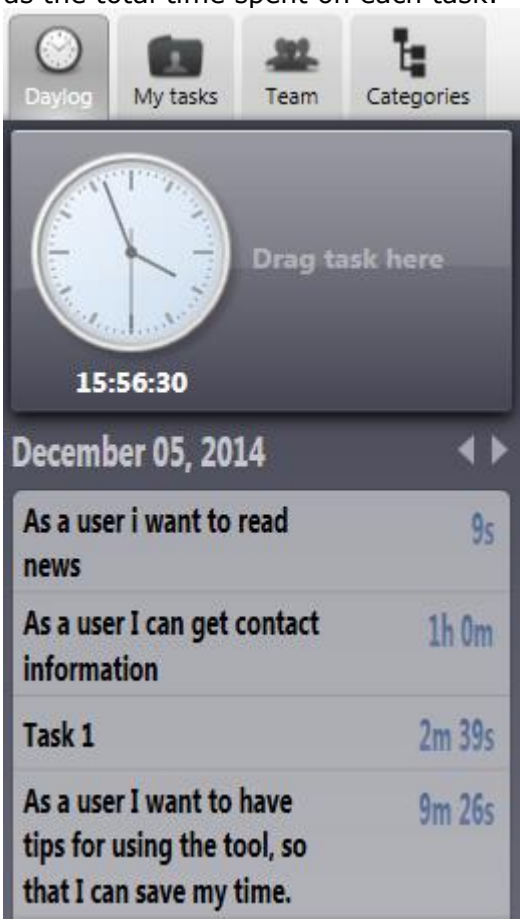
3. Click **Stop** or **Pause** buttons to pause or resume task tracking at any time.



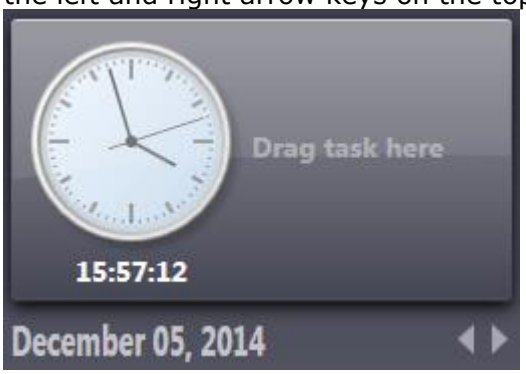
4. When you track time, Eylean Board notices when you are inactive and asks whether it was a break or were you working on a selected task.



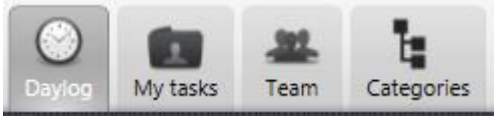
5. The **Daylog** tab allows to see the list of all tasks taken on throughout a particular day as well as the total time spent on each task.



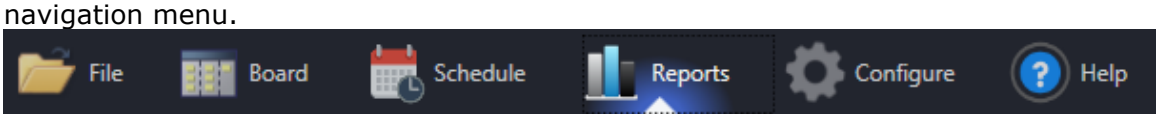
6. To see what you have been doing on the previous days, navigate back and forth by selecting the left and right arrow keys on the top of the task list.



7. To hide the daylog tab, click on the name of it.



8. To get daily, monthly or even yearly reports of your work, select **Reports** from the top navigation menu.

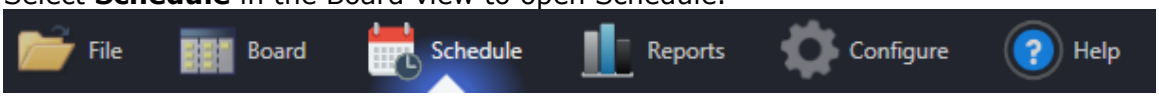


To learn how to track your tasks straight from the Windows taskbar, please refer here.

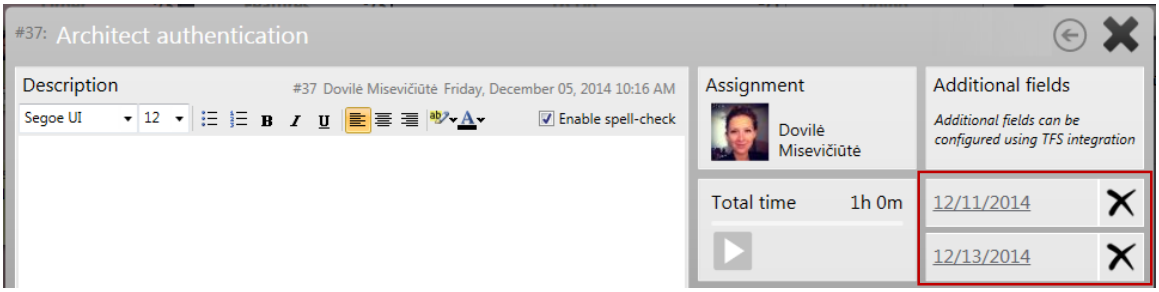
6.3. Schedule

Schedule allows you to see the tasks in a calendar view.

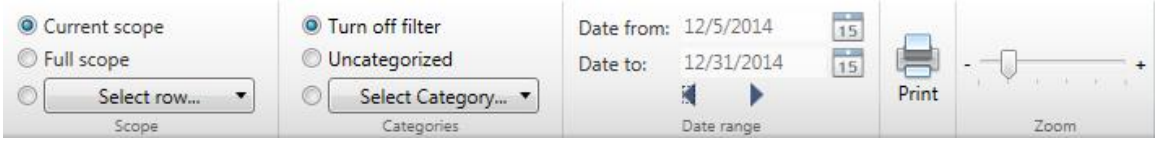
1. Select **Schedule** in the Board view to open Schedule.



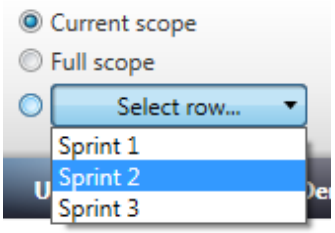
Note! For tasks to be seen in the schedule view, they have to have start and end dates, which are entered and modified in the task details view. For more information, refer here.



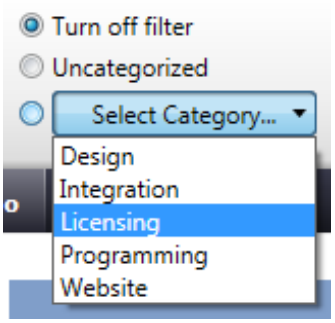
2. Various filtering options may be selected to see the information you need.



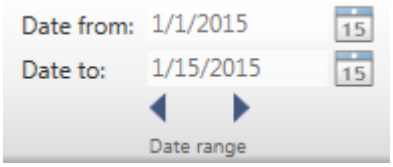
- **Scope.** Select the tasks of **Current Scope**, **Full Scope** or only a desired row of the board. For more information about selecting **Current Scope**, please refer here.



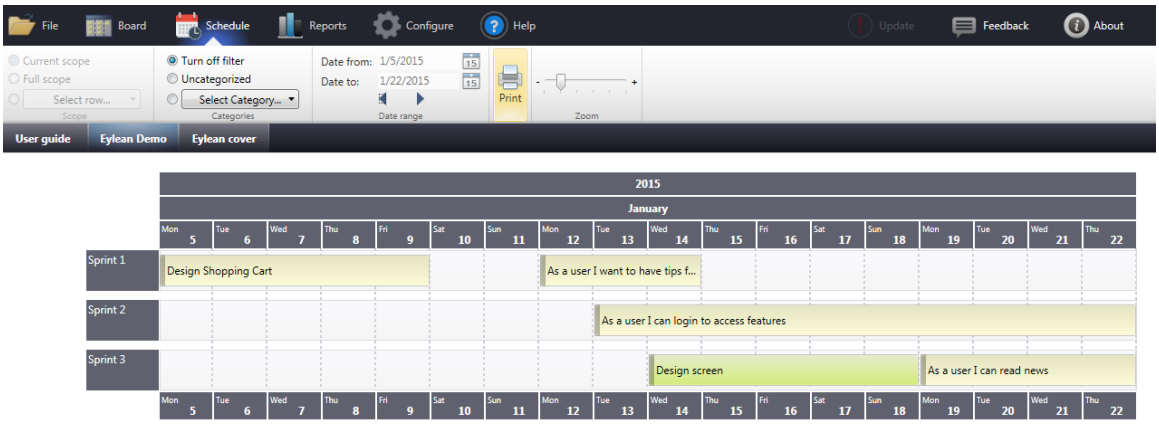
- **Categories.** Keep this filter turned off if you don't use Categories. If you use task grouping by Categories, select a desired category or see uncategorized tasks. For more information about categories, please refer here.



- **Date range.** Select the period for which you want to see the schedule. Use arrows to move the decided period back and forth by one day.



3. The present day is highlighted in the schedule.

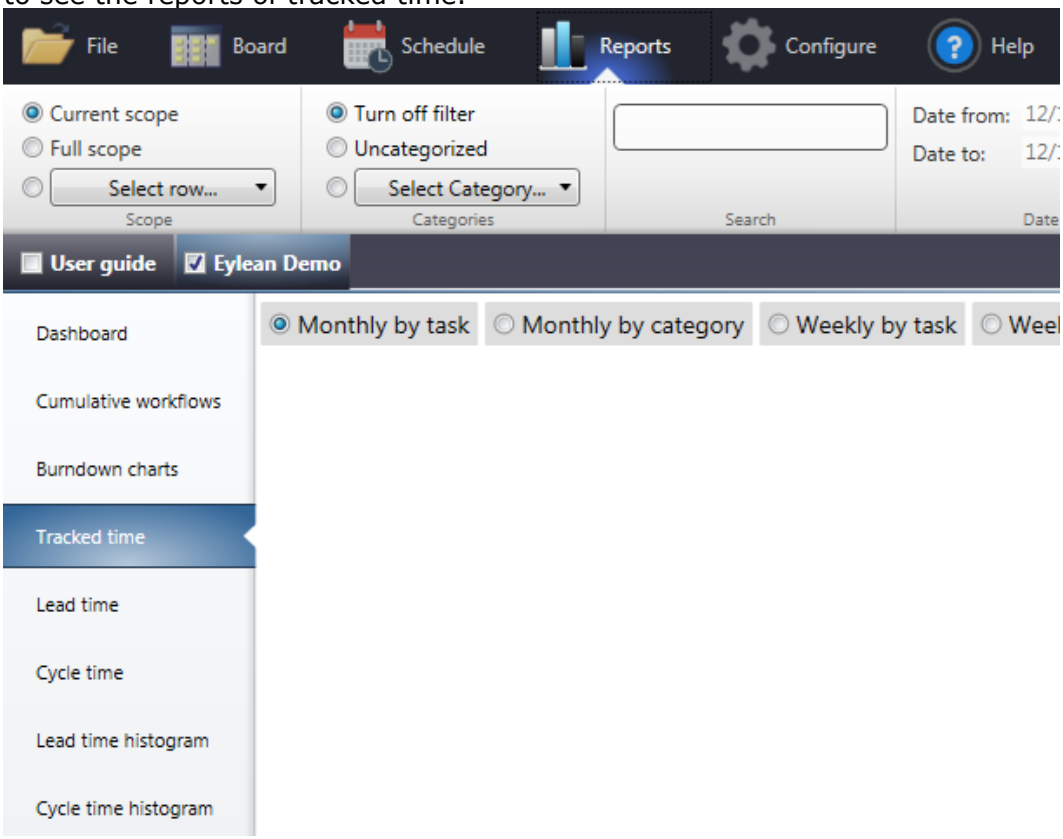


4. To open task details, double click on the task in the schedule.

6.4. Reports

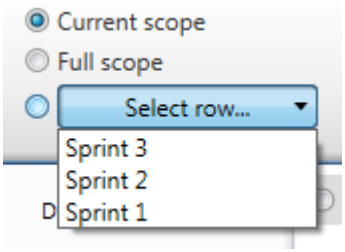
6.4.1. Time Reporting

1. Select **Reports** in the Board view and then select **Tracked time** from the left navigation menu to see the reports of tracked time.



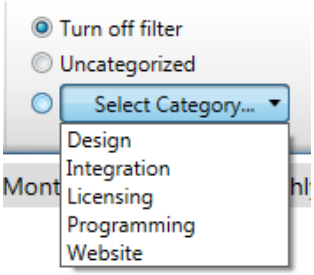
Various filtering options may be selected to see the information you really need.

- **Scope.** Select the tasks of **Current Scope**, **Full Scope** or only a desired row of the board.

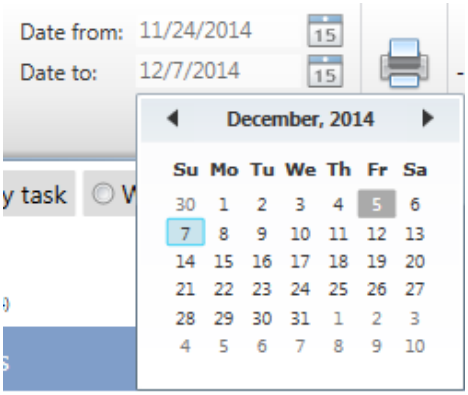


For more information about selecting **Current Scope**, please refer here.

- **Categories.** Keep this filter turned off if you don't use Categories. If you use task grouping by Categories, select a desired category or see uncategorized tasks.



- **Date range.** Select the period for which you want to get a Time report.

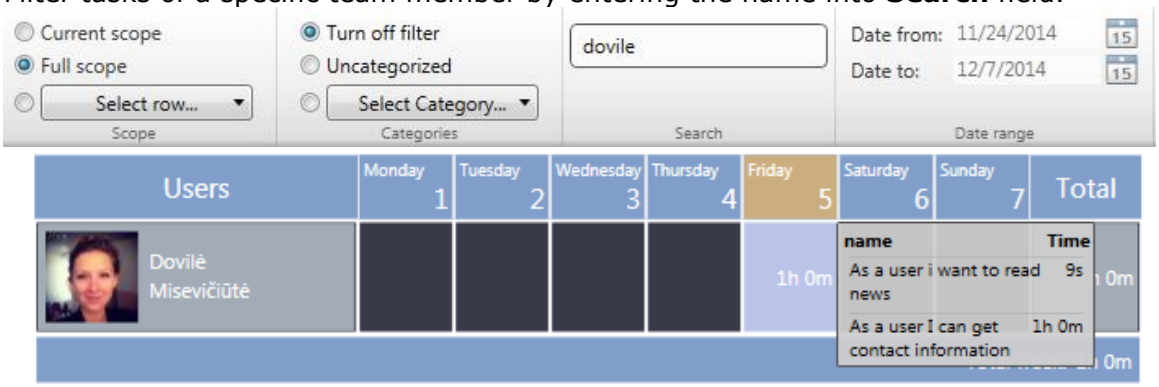


2. **Time report by user** represents all the time tracked during a selected period showing how long each team member was working.

Users	Monday 5	Tuesday 6	Wednesday 7	Thursday 8	Friday 9	Saturday 10	Sunday 11	Total
Jacob Robinson		4h 34m	2h 10m		7h 3m	4h 22m		18h 11m
David Smith		31m 19s		4h 55m	1h 23m	26m 26s		7h 16m
Amanda Carter	10m 54s	22m 10s			2h 9m			2h 42m
Ted Clark				17m 30s			13m 17s	30m 47s
Dovilė Sinkevičiūtė	4h 2m					18m 30s		4h 20m
George Davis	3h 23m							3h 23m
Joe Spencer		40m 0s		1h 10m				1h 50m
								Total week: 38h 16m

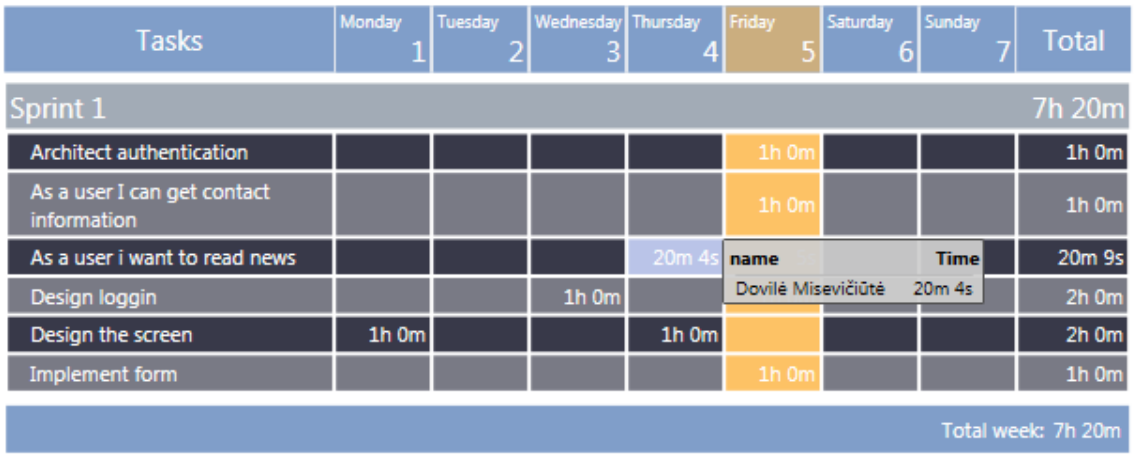
Report for 2011.09.05 - 2011.09.30
Total tracked time: 69h 35m

3. Filter tasks of a specific team member by entering the name into **Search** field.



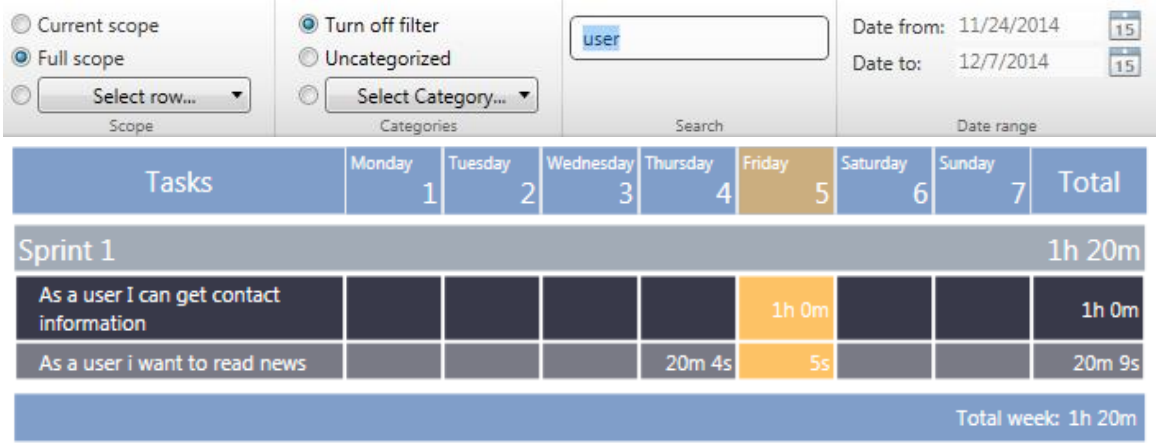
Tip! Hover the mouse over the tracked time to see which task a team member was working on.

4. **Time report by task** represents the time tracked for each task.



Tip! Hover the mouse over the tracked time to see who was working on a selected task.

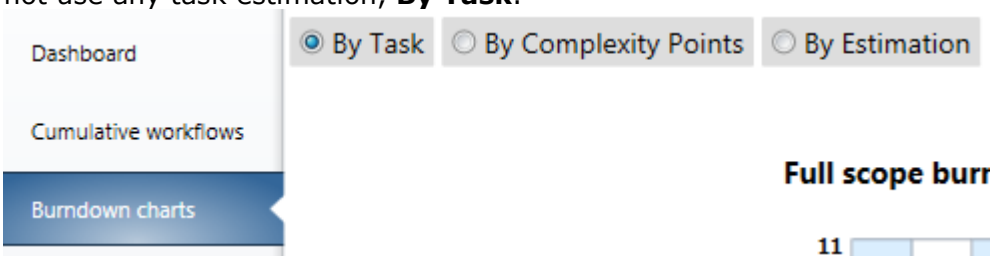
5. See only specific tasks by entering their name into Search field



6.4.2. Burndown Chart

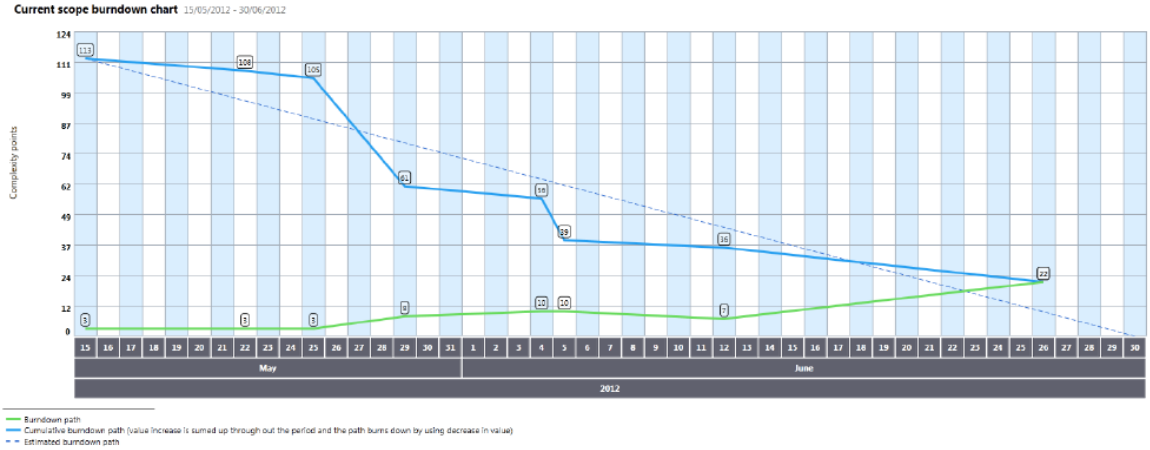
1. Select **Reports** from the top navigation menu.

2. Select **Burndown charts** from the left menu. Select chart **By Complexity Points** or **By Estimation** depending on the task estimation you used when creating a new task. If you did not use any task estimation, **By Task**.



3. You can see two lines in the Burndown chart:
   - Green one, which shows the real situation with value increase and decrease.
   - Blue one, which is cumulative burndown path. Here value increase is summed up throughout the period and the path burns down by using decrease in value.

Note! Estimated Burndown path (showing the ideal situation how the tasks should be burned down) for the selected iteration/Sprint. For more information about time boxing in rows, please refer here.

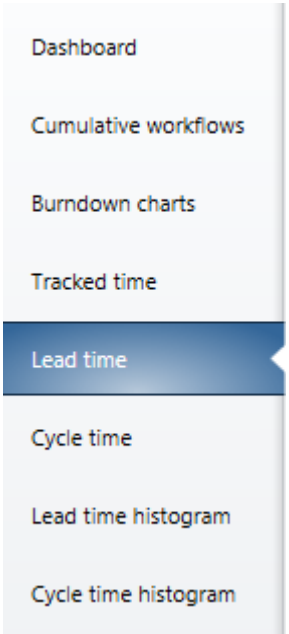


6.4.3. Lead Time Reports

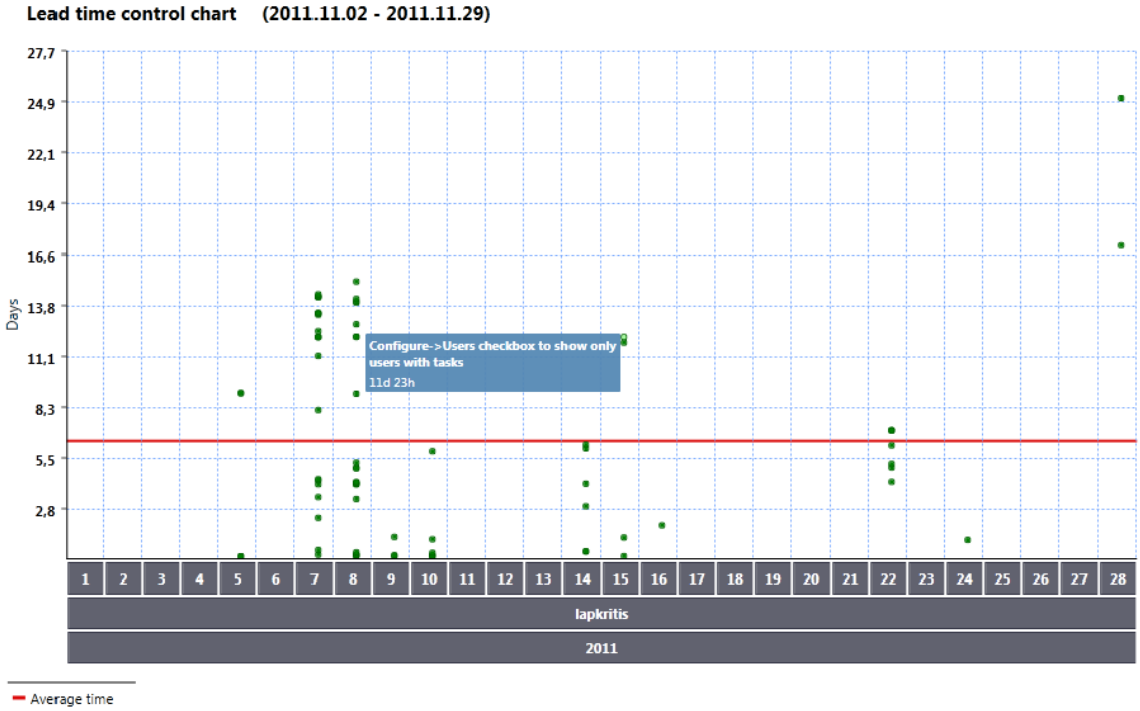
Lead time shows how long it takes for a task to be completed from the moment of creating it till the moment it's finished.

1. Select **Reports** from the top navigation menu.

2. Choose **Lead time** from the left menu to get a Lead time report.

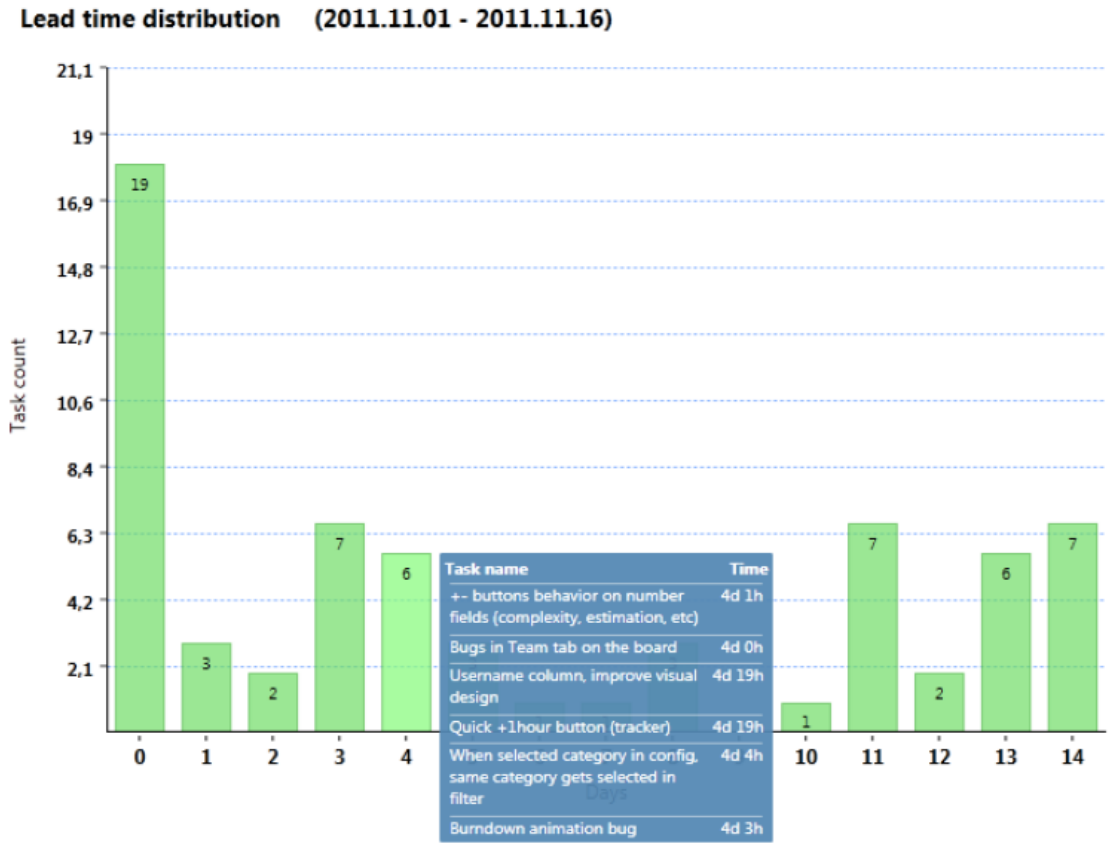


3. See the lead time of each task individually.
4. Check the average lead time - red line.



Tip! Hover the mouse over the green bubble to see the information about the task.

5. Choose **Lead time histogram** from the left side menu to get a Lead time histogram which shows the distribution of lead time in bars with bases on the horizontal axis. The heights of bars refer to number of tasks completed during a time shown on horizontal axis.



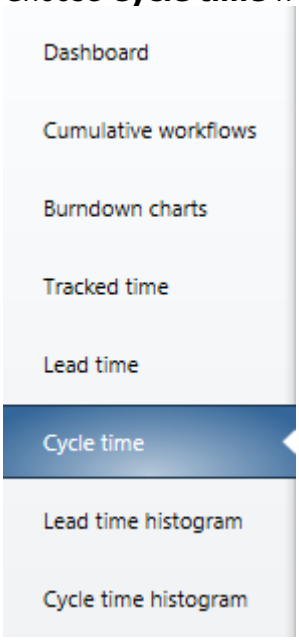
Tip! Hover the mouse over the bar to see the information about the tasks.

6.4.4. Cycle Time Reports

Cycle time shows how long it takes to complete tasks from the moment they appear in the Work in Progress section until the moment it is finished.

1. Select **Reports** from the top navigation menu.

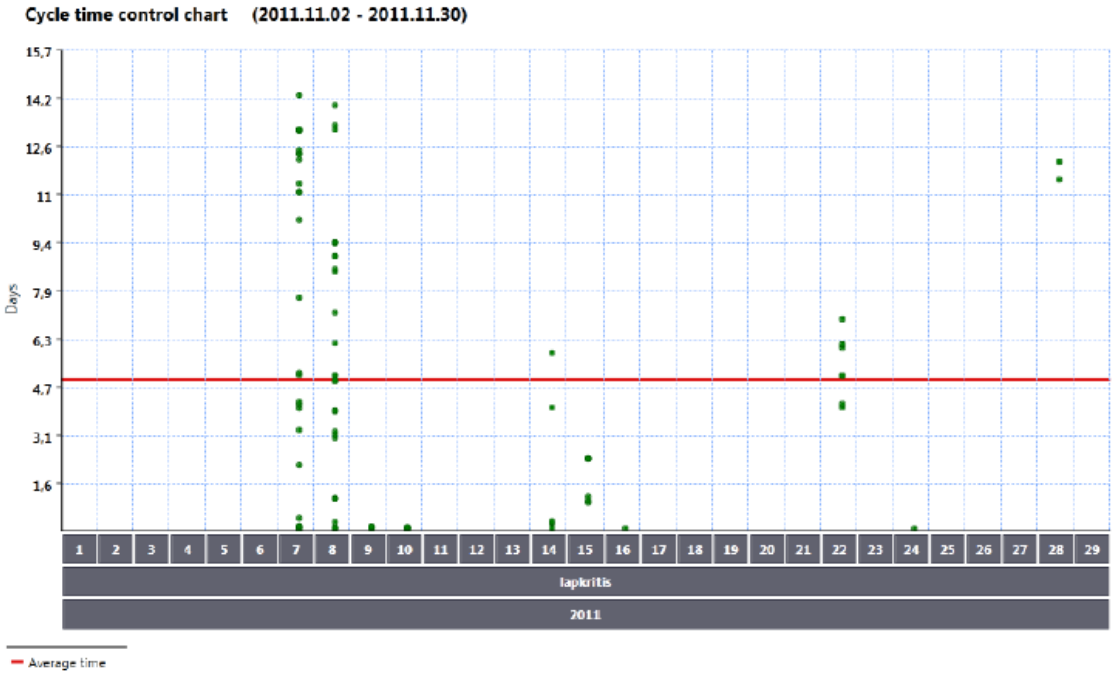
2. Choose **Cycle time** from the left side menu to get a Lead time report.



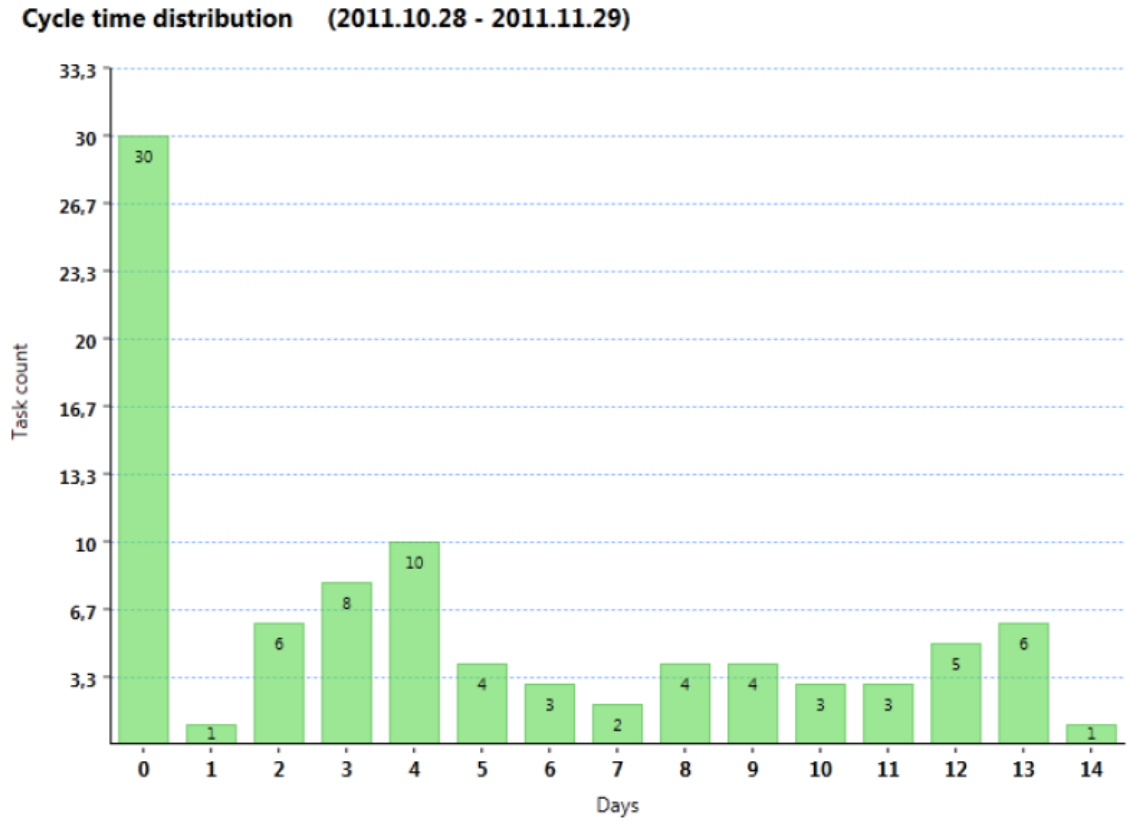
3. See the cycle time of each task individually.

Tip! Hover the mouse over the green bubble to see the information about the task.

4. Check the average cycle time - red line.



5. Choose **Cycle time histogram** from the left side menu to get a Cycle time histogram which shows the distribution of cycle time in bars with bases on the horizontal axis. The heights of bars refer to number of tasks completed during a time shown on horizontal axis.



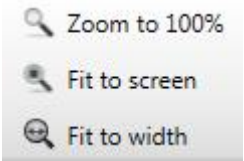
Tip! Hover the mouse over the bar to see the information about the task.

6.5. Task Board

The main view of Eylean Board is Task Board. Its simple design lets you reach everything quickly and makes every day work less complicated.

1. At the top menu you can find buttons to **Delete** a selected task, to **Undo** and **Redo** previous actions.

2. There are several view options:



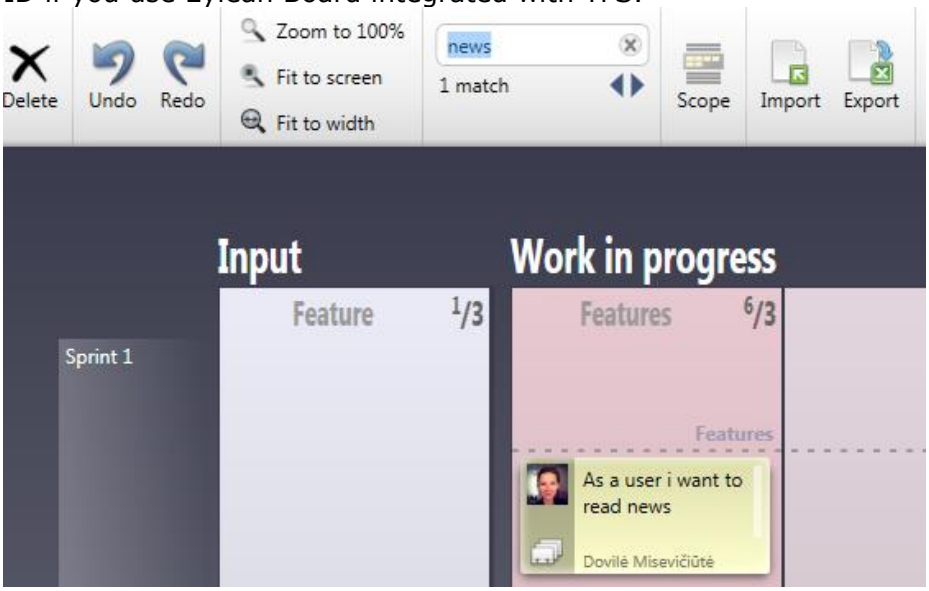
- **Zoom to 100%** button lets you see the part of the board and read the names of task cards easily. Tip! Use scroll bars to move the board or simply drag the board using mouse to desired direction.
- **Fit to screen** button lets you see the whole board fitted to the screen. This is useful for evaluating the whole situation at a glance.

- **Fit to width** button adjusts only the width of the board. In this cace the lower part of the board may not be visible, if the board is very long.

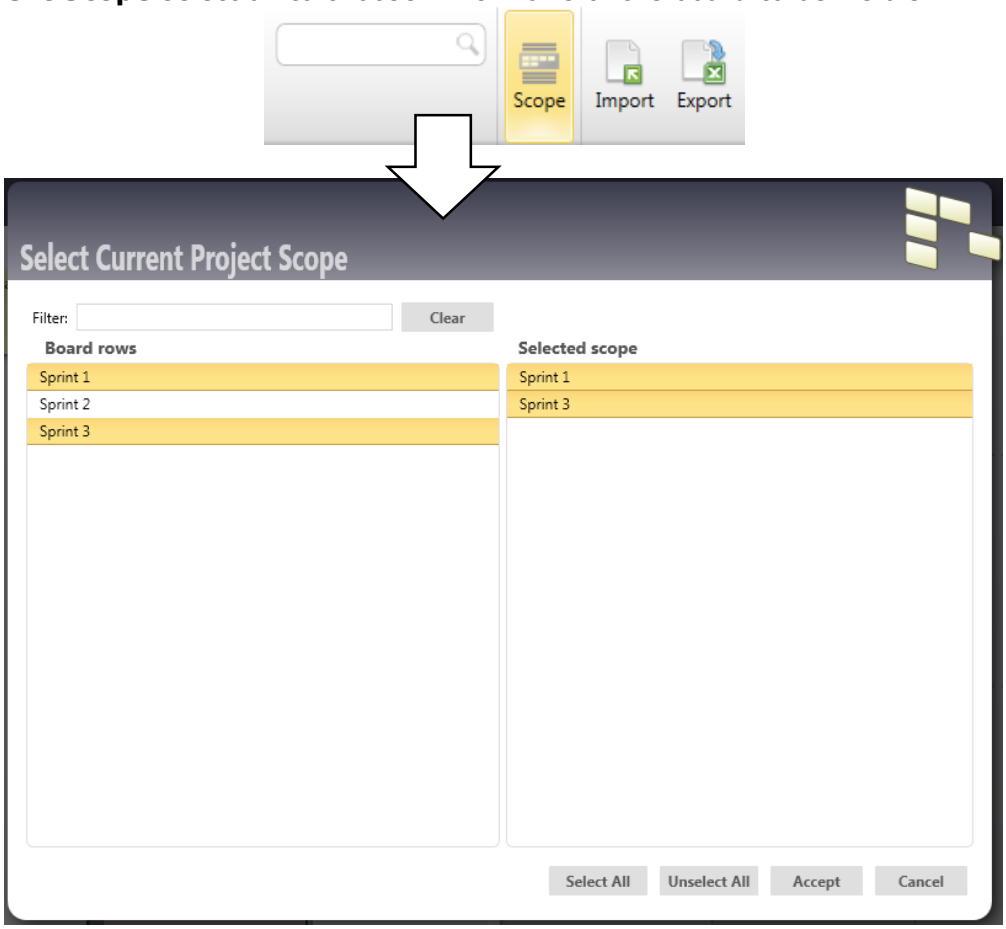
Tip! Use scrol bars or simply drag the board using mouse to see the hidden part.

- Use **Zoom in** and **Zoom out** icons (at the bottom right corner) or a combination of ctrl + mouse scroll wheel to change the view.

3. Use **Search** bar to quickly find a specific task. Enter a full task name, a part of it or TFS item ID if you use Eylean Board integrated with TFS.



4. **Use Current Scope** selection to choose which rows of the board to be visible.



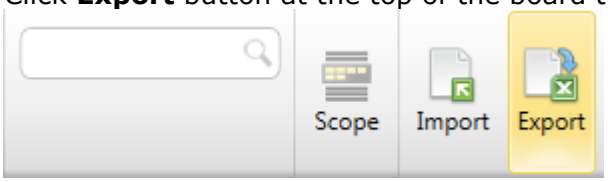
- Click on the desired rows on the left side list to select them for Current Scope.
- When selection is made, click **Accept**.
- To remove the selected rows from Scope, click on the name of desired row on the right side list.
- When selection is made, click **Accept**.

5. **Import/Export** User Stories (.csv or .xml files) or User Stories with their tasks (.xml files) to keep a local backup of your data or to move tasks between different workspaces.

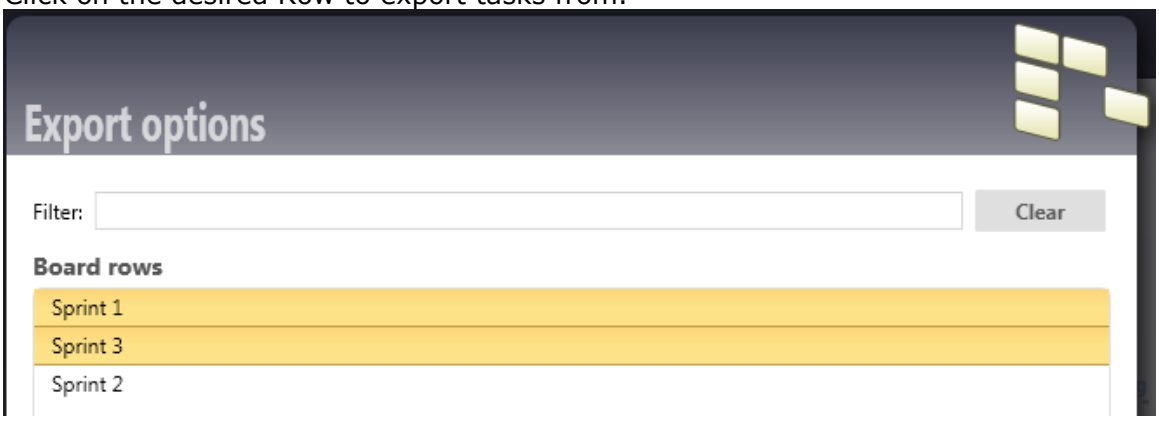
Note! In order to import tasks to another workspace, the configuration of the boards should match. Otherwise, all the tasks will be imported into one column.

To export Tasks:

1. Click **Export** button at the top of the board to export tasks.

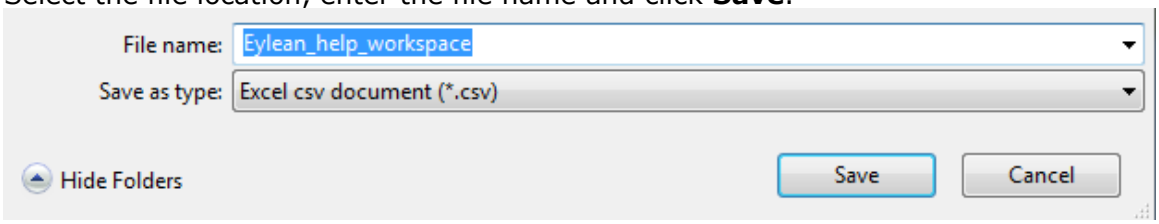


2. Click on the desired Row to export tasks from.

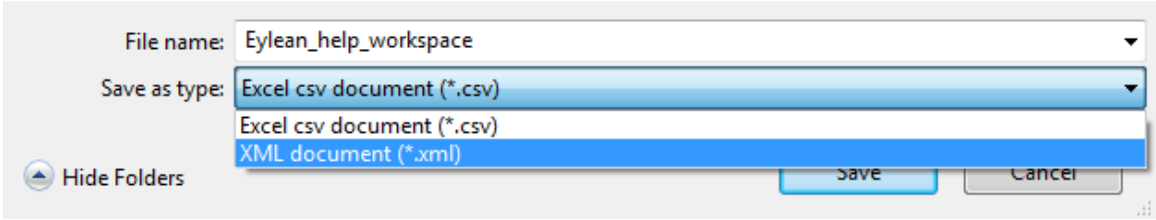


3. When selection is made, click **Export**.

4. Select the file location, enter the file name and click **Save**.

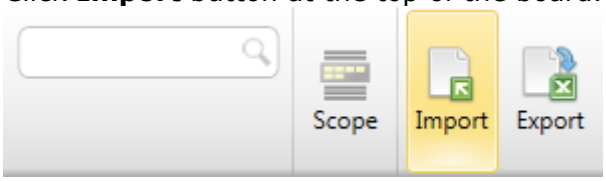


Note! When exporting Tasks only, you can choose .csv or .xml file type.



To Import Tasks:

1. Open a workspace you want the Tasks to be imported to.
2. Click **Import** button at the top of the board.



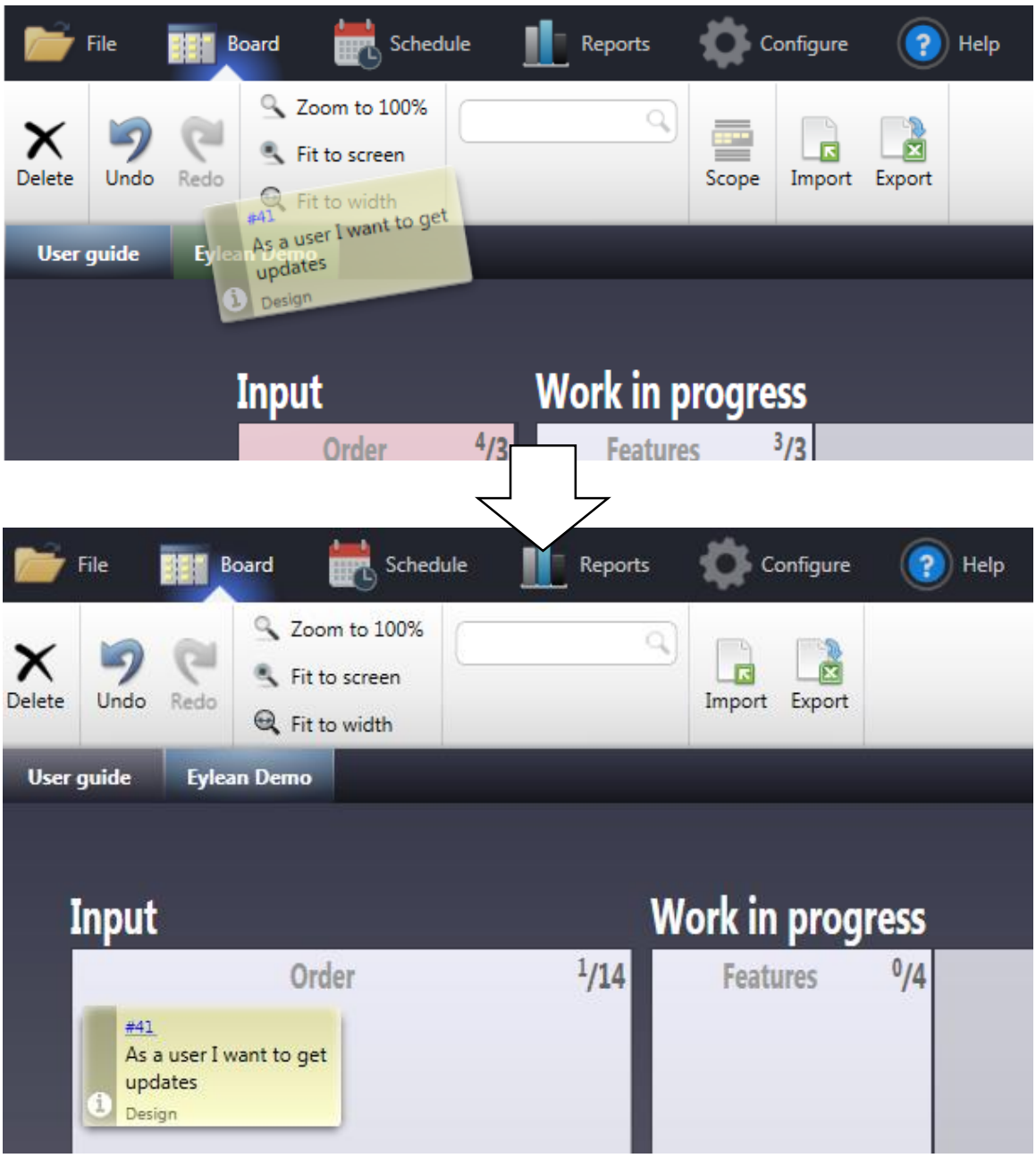
3. Select the desired file and click **Open**.

Tip! You can also import tasks exported from other tools if the data meets this specification:

Headers	Data type
Title	String
Description	String
State	String
Row	String
Assignee	String(Windows UserName)
Estimate	Double
Complexity	Double
Color	Int[0…7]
Alert	String
Tracked	Int
Archived	Boolean
Id	Guid
Parent	Guid
Due	Date
Datefinished	Date
Iscompleted	Boolean
Start	Date
End	Date

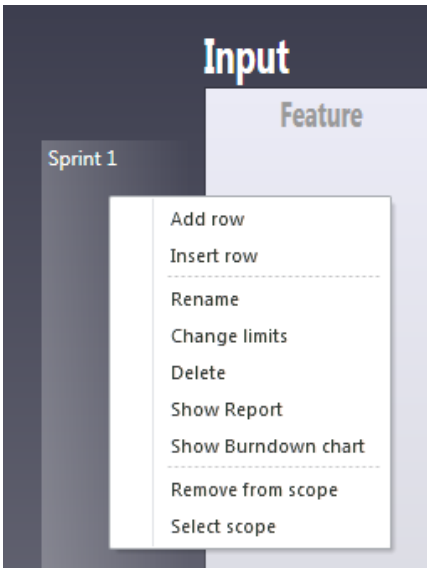
6. Below the top menu, you can see the tabs of the boards created in the workspace.

Use these tabs to move tasks between the boards of one workspace. Just drag the task card on the name of the board and drop it, when the tab becomes green.



Note! You can only move Tasks which have no Subtasks or only separate Subtasks between the boards.

7. Right click on left side of the board to open a drop list for managing rows. Here you can:
    - Add Row;
    - Insert Row;
    - Rename Row;
    - Change limits of the tasks in the Row;
    - Delete a Row;
    - Get a Time report of a selected Row;
    - Get a Burndown chart of a selected Row;
    - Remove selected Row from Scope;
    - Access Current Scope selection.



For more information about rows, please refer here.

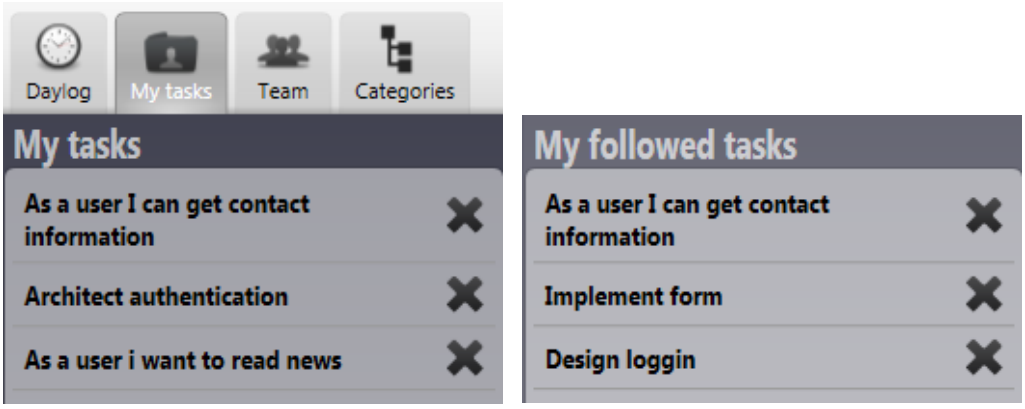
6.6. Sidebar: My tasks, Team and Categories tabs

The sidebar on the right contains **Daylog**, **My tasks**, **Team** and **Categories** tabs.

The **Daylog** tab is fully described in the Time Tracking page.

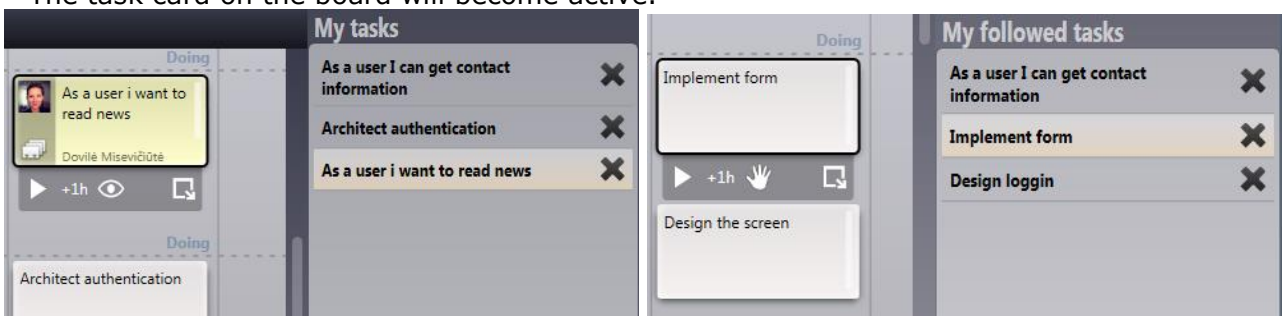
6.6.1. My tasks tab

1. See the list of all your tasks (tasks, that are assigned to you or taken by you) and all your followed tasks (tasks, which you are following) in the **My tasks** and **My followed tasks** tabs.

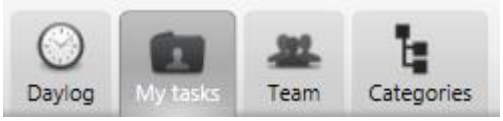


Note! Also make sure that the **Show in My tasks** box is checked in the **Board settings** area. For that, please refer to here.

2. Click on the name of a task in the **My tasks** or **My followed tasks** tabs to locate it faster. The task card on the board will become active.

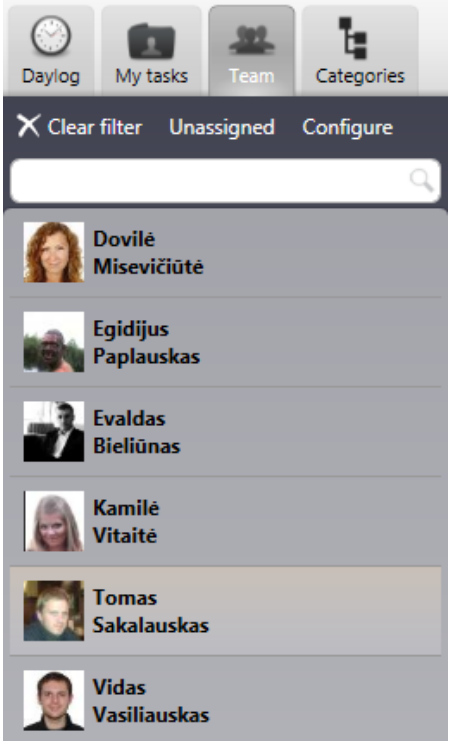


3. To hide **My Tasks** tab click on the name of it.

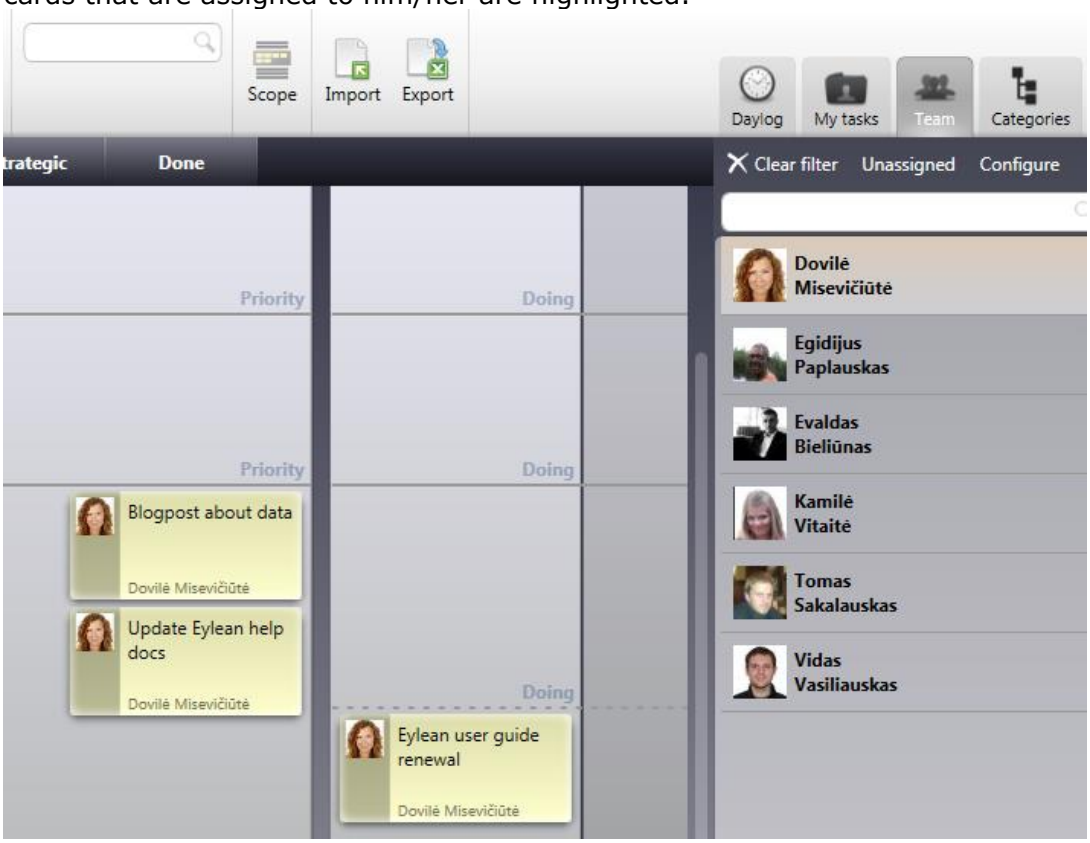


6.6.2. Team tab

1. See all the users that are assigned to a particular team in the **Team** tab.



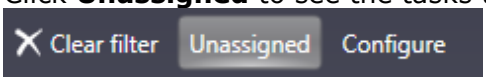
2. Select a team member to **filter** his/her tasks on the board. When a user is selected, all task cards that are assigned to him/her are highlighted.



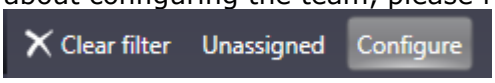
Tip! You can select more than one user at once.

3. Click **Clear Filter** button or click on the name of a team member again to clear filtering.

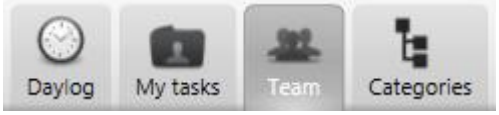
4. Click **Unassigned** to see the tasks that aren't assigned to anybody.



5. Click **Configure** button to quickly reach team configuration window. For more information about configuring the team, please refer here.

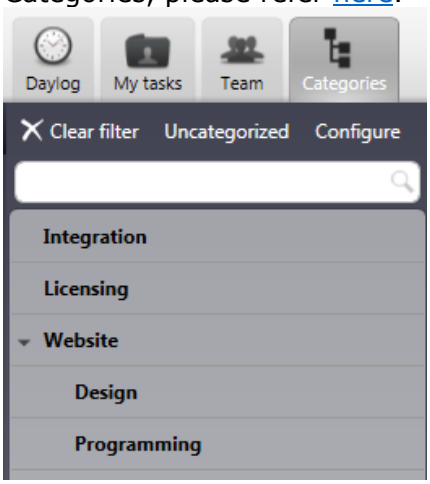


6. Click on the name of it to hide the **Team** tab.

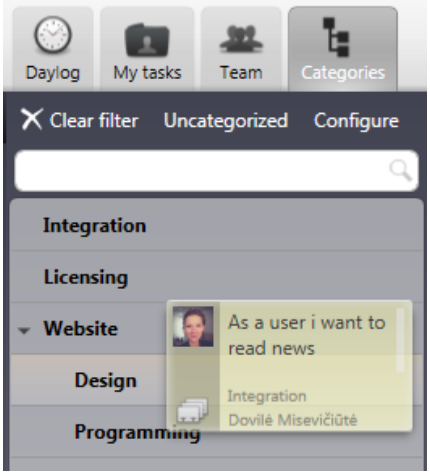


6.6.3. Categories tab

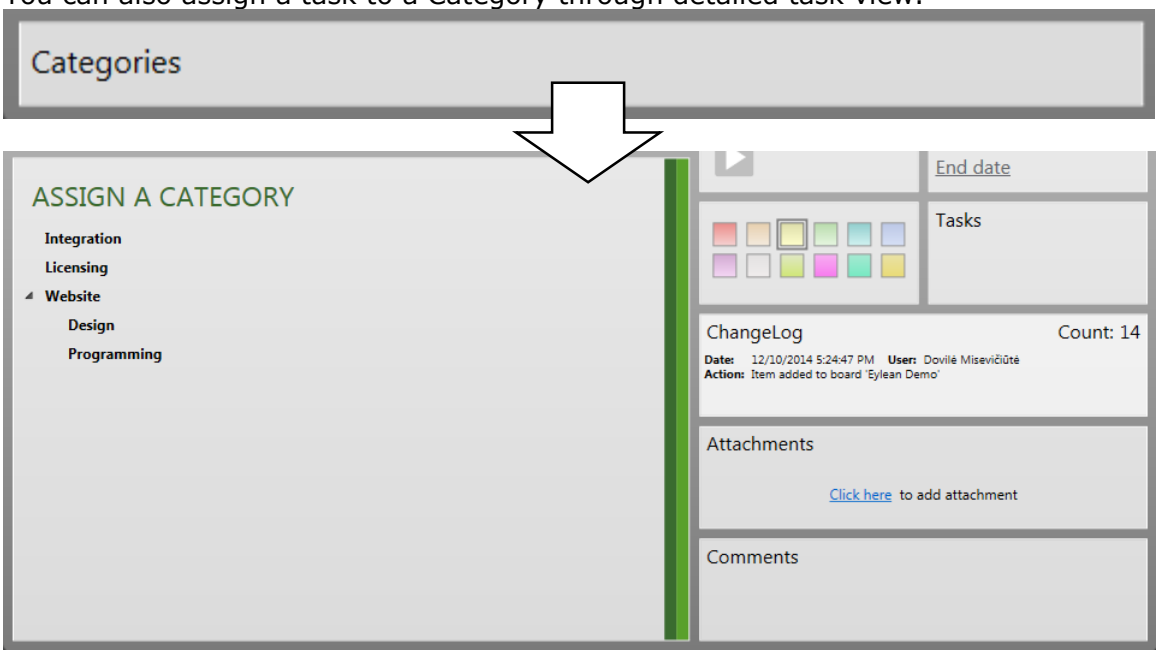
1. Use **Categories** tab is for various task grouping. For more information about Managing Categories, please refer here.



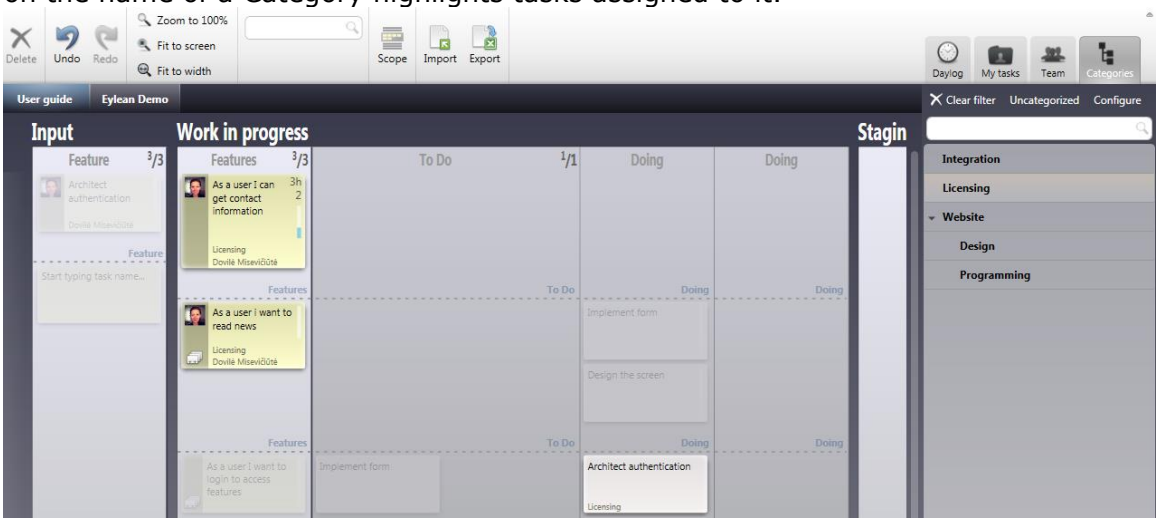
2. Drag the task card and drop it on the name of a category **To Assign** tasks to desired Category.



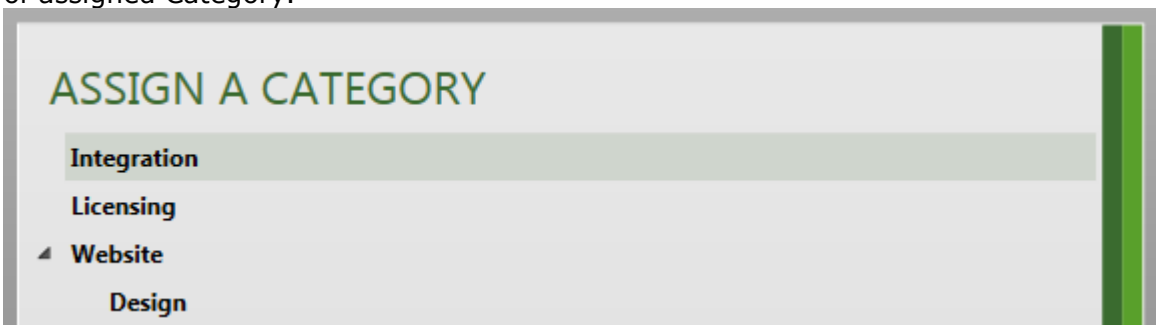
3. You can also assign a task to a Category through detailed task view.



4. Filter tasks by Categories to quickly check the stage of tasks of a specific Category. Clicking on the name of a Category highlights tasks assigned to it.

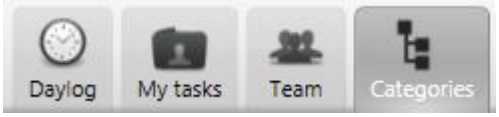


5. To unassign a Category, open detailed task view, select Categories area and click on the name of assigned Category.



Tip! To change a Category, drag and drop the task card on the other Category in the Categories Tab without unassigning the previous one.

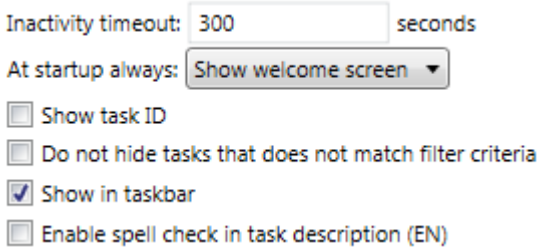
6. To hide Categories Tab, click on the name of it.



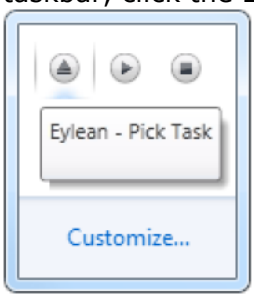
6.7. Eylean in Windows Taskbar

You can quickly access your tasks by pinning the Eylean application to the Windows taskbar.

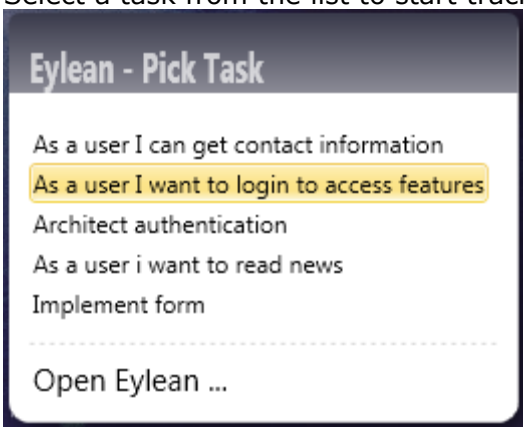
1. Open one of your workspaces and select **Configure** > **User**.
2. Tick the **Show in taskbar** box.



3. To pick a new task from your backlog and initiate its tracking straight from the Windows taskbar, click the **Eylean - Pick Task** icon.

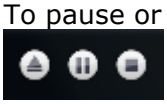


4. Select a task from the list to start tracking.



Note! This list shows the tasks assigned to you.

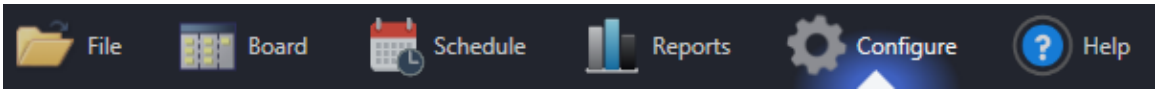
5. To pause or resume task tracking, click the appropriate icons from the taskbar.



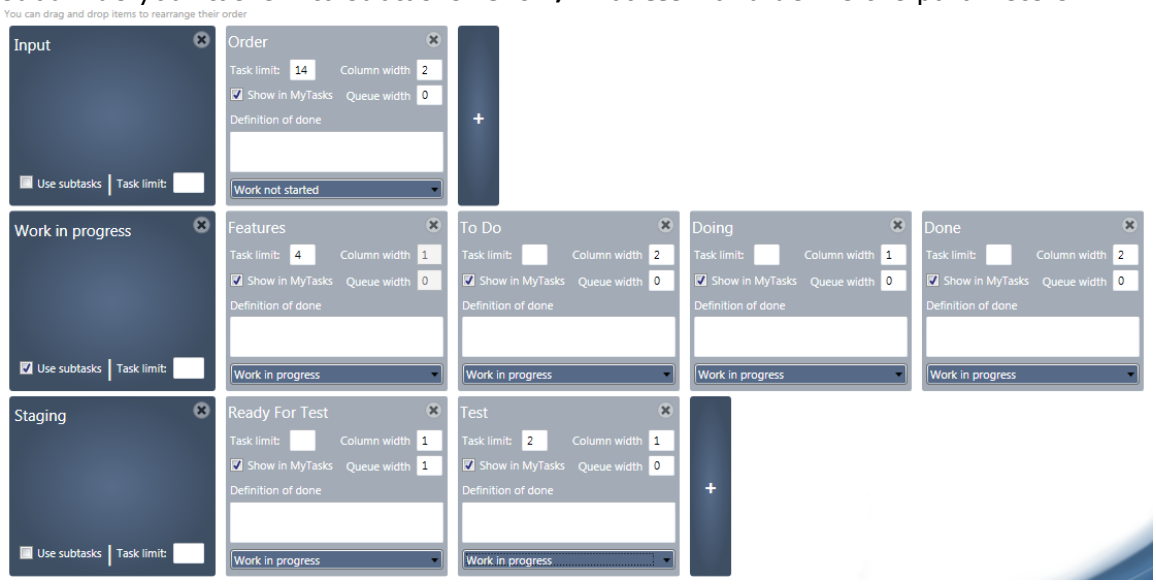
6.8. Managing Subtasks

Learn how to split tasks into smaller pieces – subtasks – in order to fulfill a certain requirement (feature or user story).

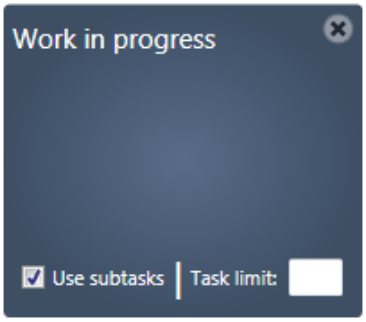
1. Select **Configure** from the top navigation menu.



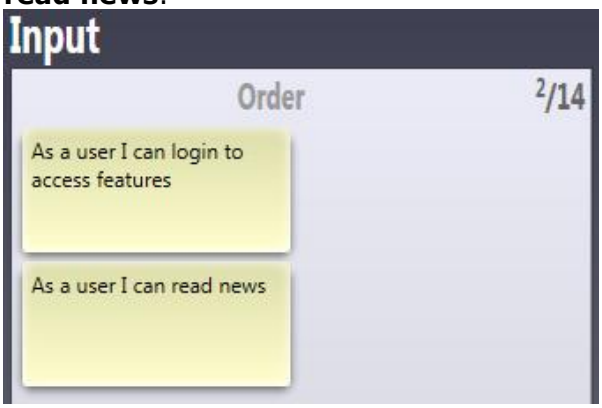
2. Create a number of additional columns in **Work in progress** section. These will help you to subdivide your tasks into subtasks. Click **‚+' button** and define the parameters.



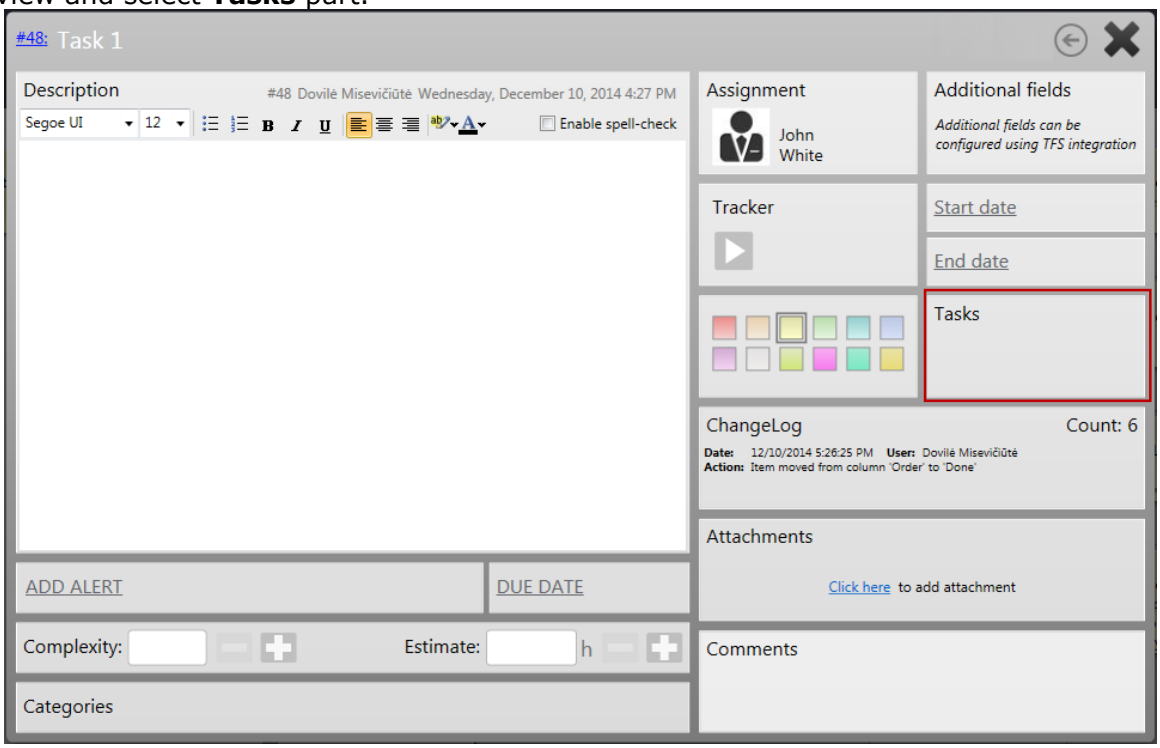
3. To be able to split certain task or feature into subtasks, check the **Use subtasks** box.



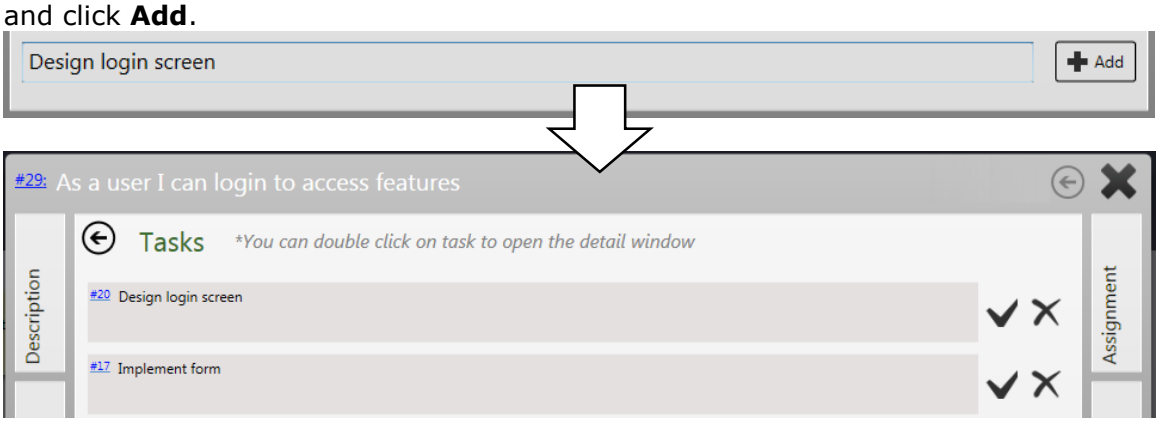
4. Return to your workspace and start creating task cards. Let's say that you have two user stories as requirements: **As a user I can login to access features** and **As a user I can read news**.



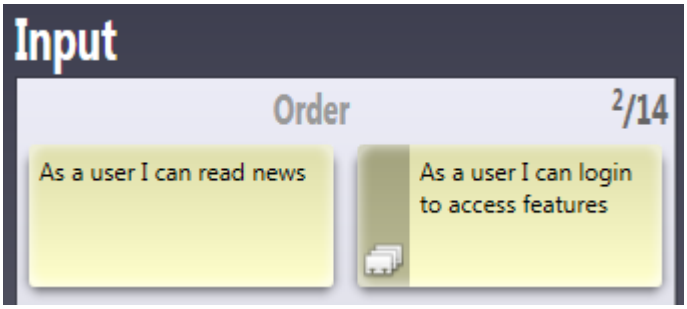
5. To add **Subtasks** to the Task you have to double click on the task card to open its detailed view and select **Tasks** part.



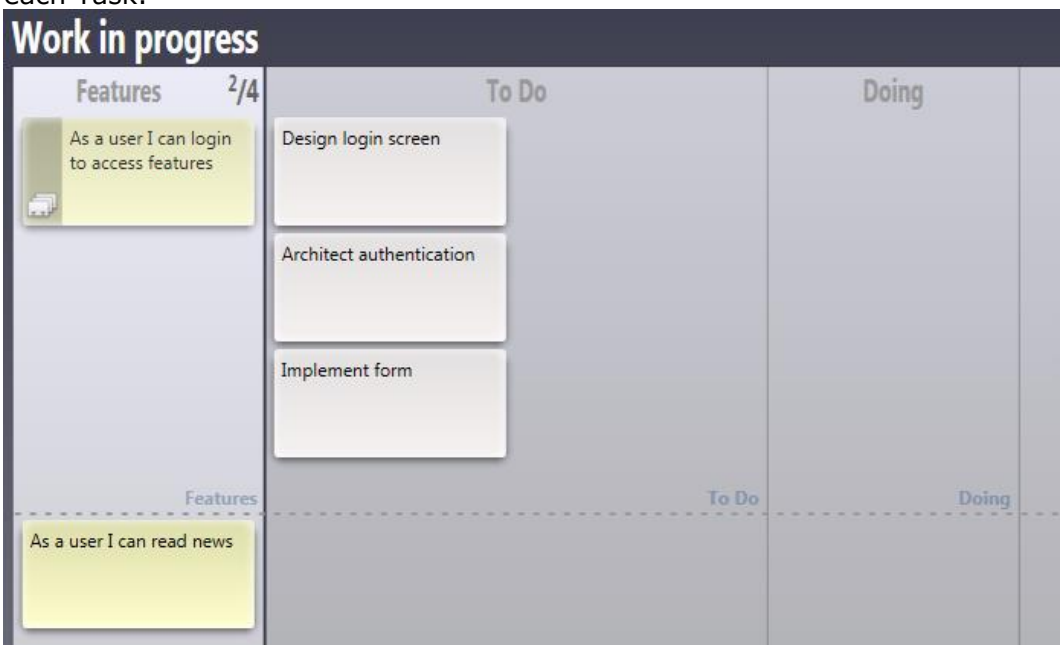
6. Let's say that the following subtasks are necessary to complete a selected task: **Design login screen**, **Architect authentication**, and **Implement form**. Enter the name of the subtask and click **Add**.



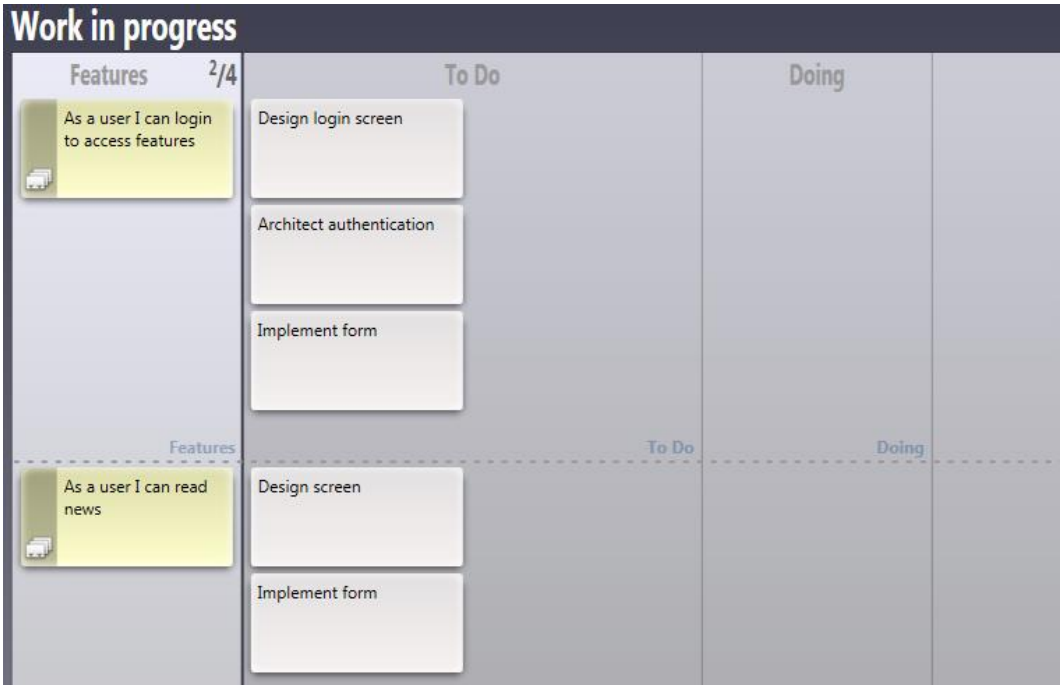
Note! As subtasks are hidden when a task is in the first or the last section of the board, an icon appears on this task to inform that it contains subtasks.



7. Both Tasks (**As a user I can login to access features** and **As a user I can read news**) may be done in parallel. Move them from the Backlog to the first column of Work in Progress section. As you see, the Subtasks are now shown on the board. A separate lane is created for each Task.

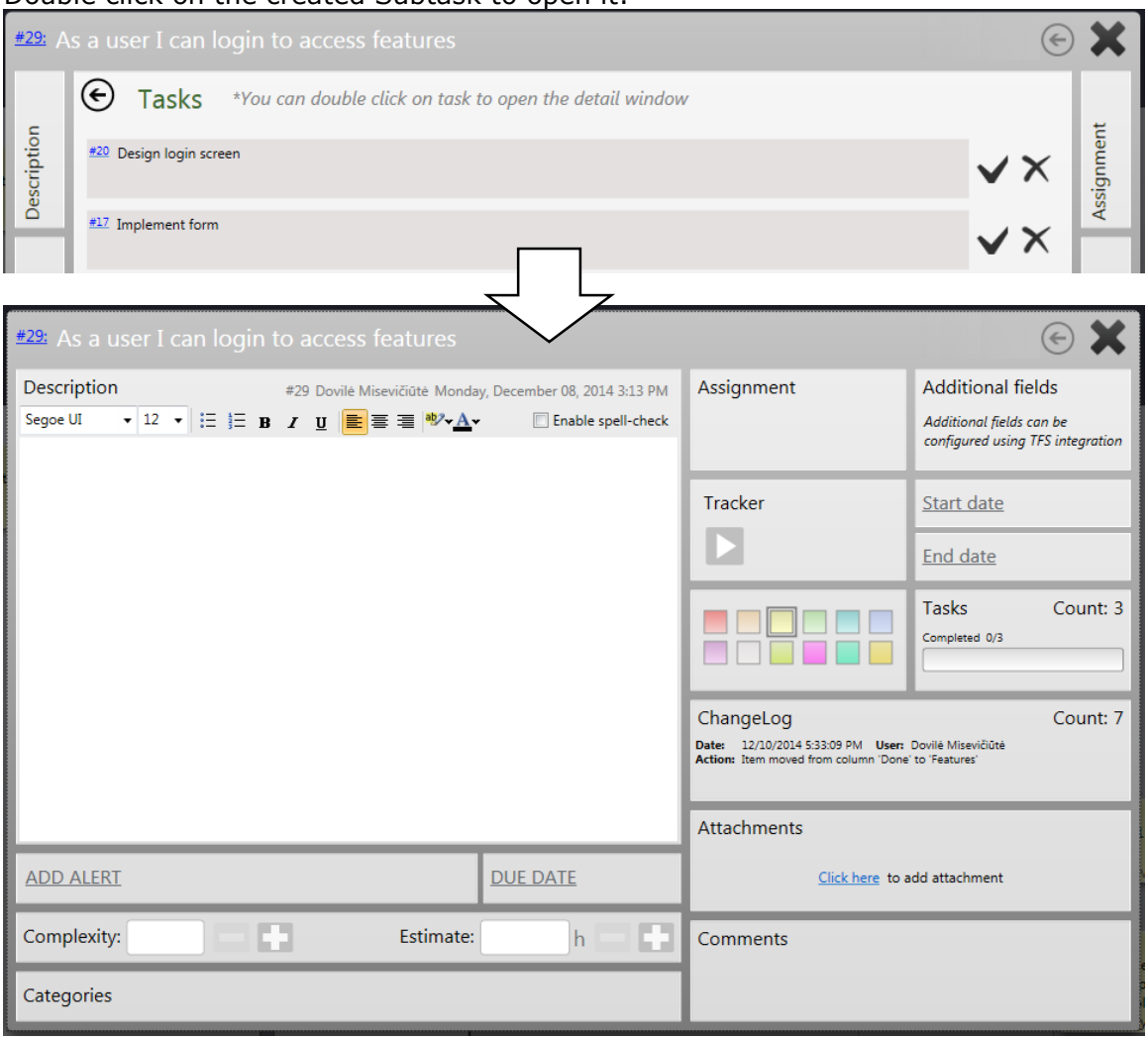


8. Subtasks may also be created by double clicking on the board when a Task is moved to the Work in Progress section:
   a. If the first column of Work in Progress section has column queue, double click on it to create Subtasks for the Task.
   b. If the first column of Work in Progress section doesn't have column queue, double click on the next column to create Subtasks for the Task.

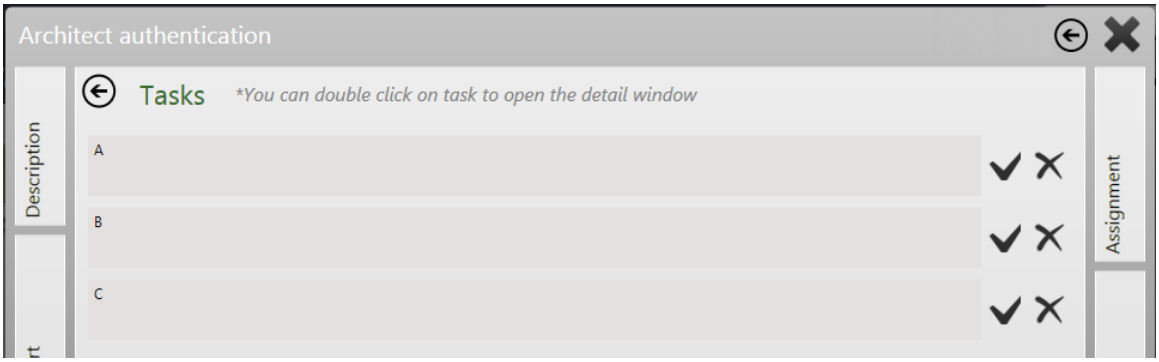


Note! Make sure that you click on the lane where the task is placed. Only this way Subtasks will be tied to the Task.

9. As many levels of tasks as you need may be created using **Task** part in detailed Task view. Double click on the created Subtask to open it.

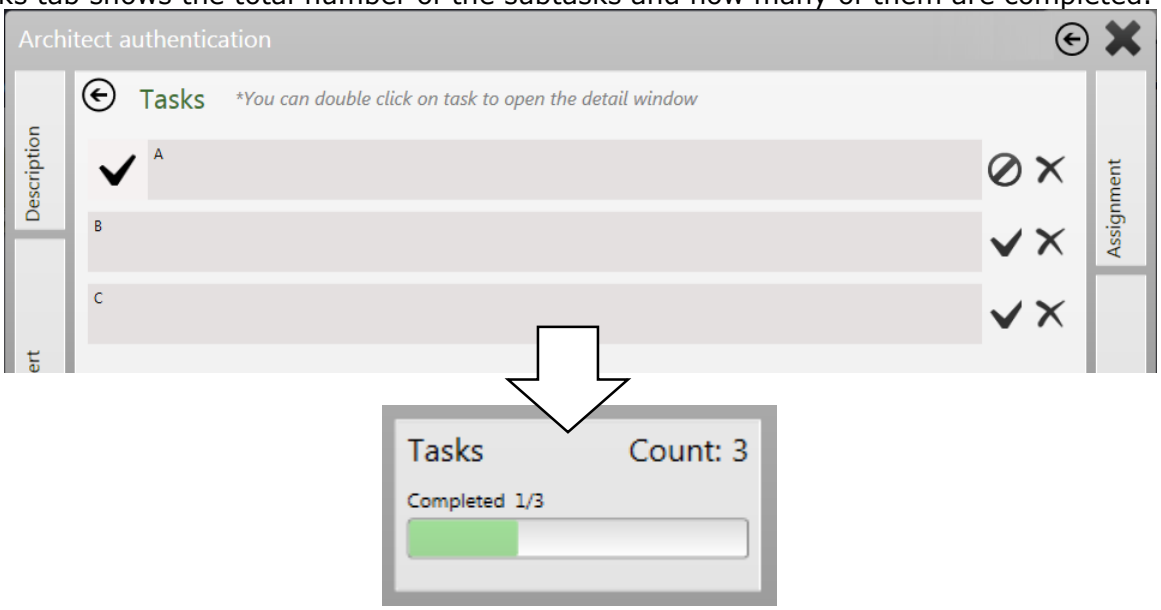


Click **Tasks** part and create more tasks which need to be done in order to complete the selected Subtask.

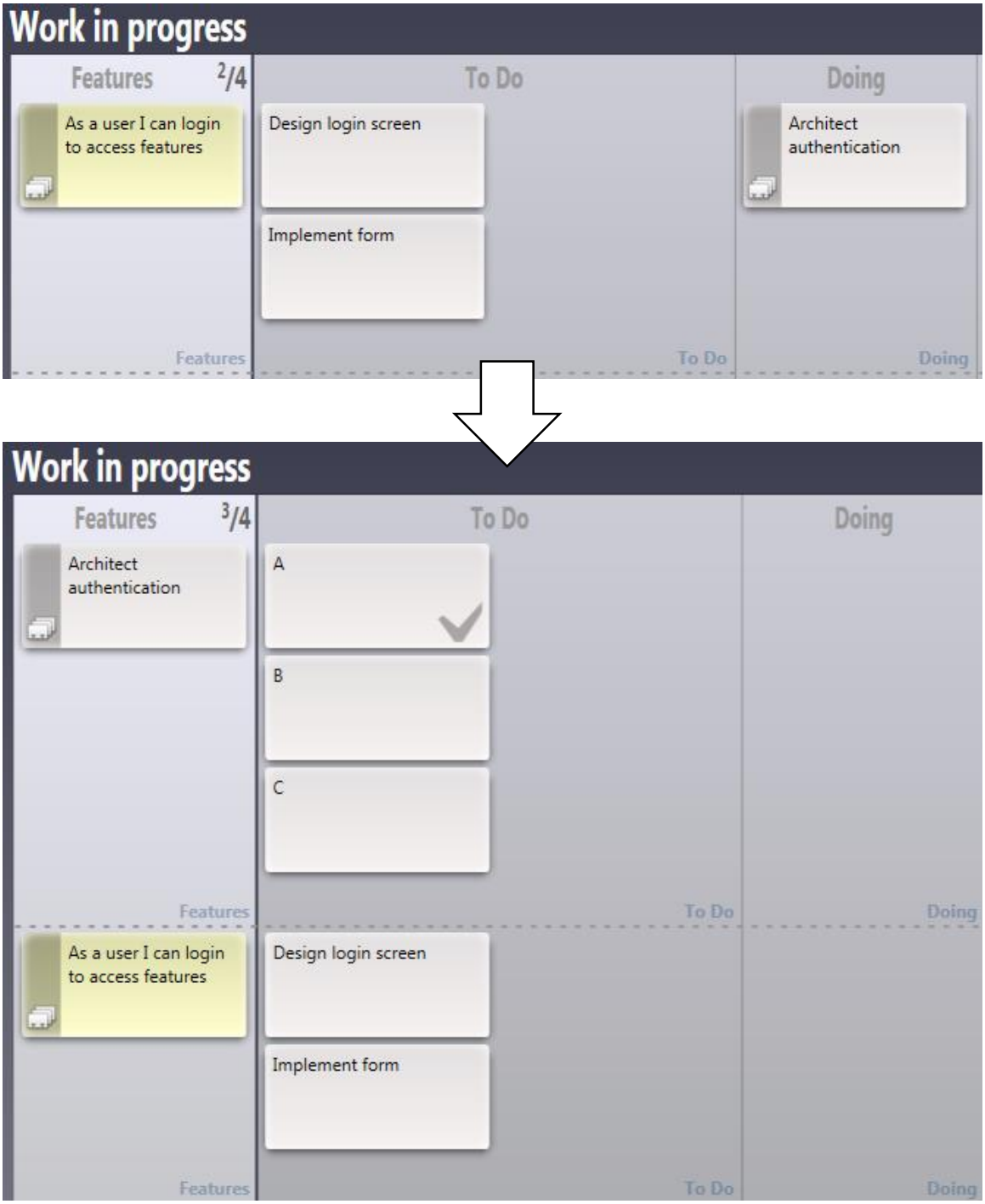


Note! Only first two levels of tasks are represented on the board in order to keep the view clear, easy to understand and avoid making the board really big.

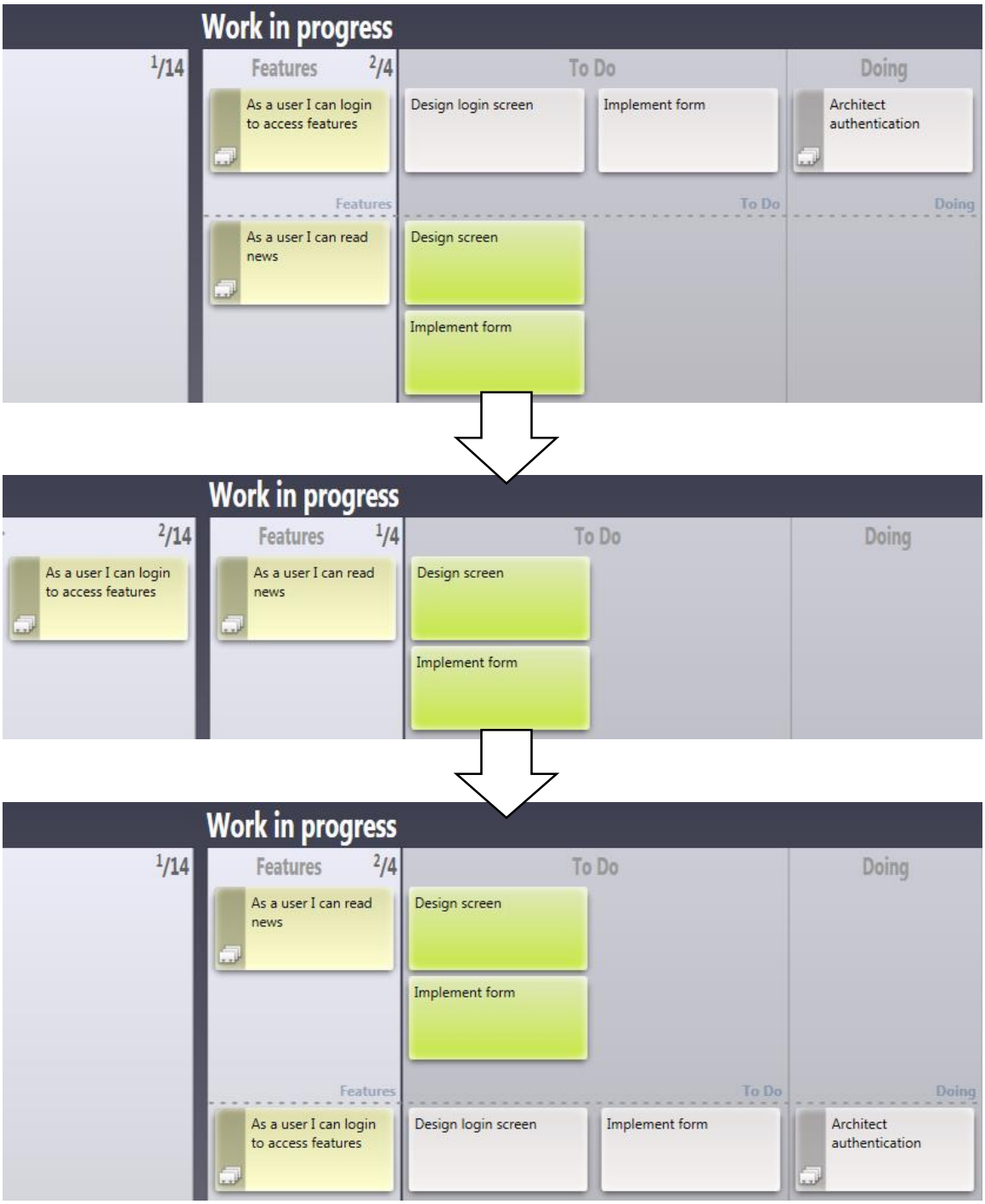
10. To inform the team members that tasks of further levels are done mark them as Completed. Tasks tab shows the total number of the subtasks and how many of them are completed.



Tip! You can see tasks of the Subtask showed on the board by placing the Subtask which contains tasks in the first column of the Work in Progress section. Moving a Subtask to its previous place hides its tasks again.



11. If you face the situation that one of the tasks should be temporarily terminated, move it back to the Input section. It can be Backlog column or priority columns (P1 or P2). The Subtasks that belong to the certain Task are hidden but when you move the user story back to the Feature column, they appear again. Even if you have already started working on that task and some subtasks have been completed, all the subtasks will be hidden, but replaced into previous columns when moved back to Work in Progress section.



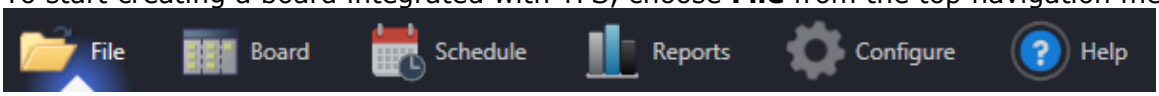
7. Integration

7.1. Create a Board Integrated with TFS

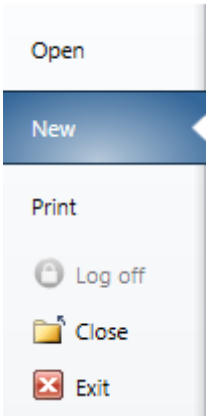
Eylean Board can be integrated with the Microsoft Team Foundation Server 2010, 2012, 2013 and Microsoft Team Foundation Server Online which allows to exploit the advantages of the existing systems and supplements the velocity of visual task management.

Please see integration guidance for more detailed info.

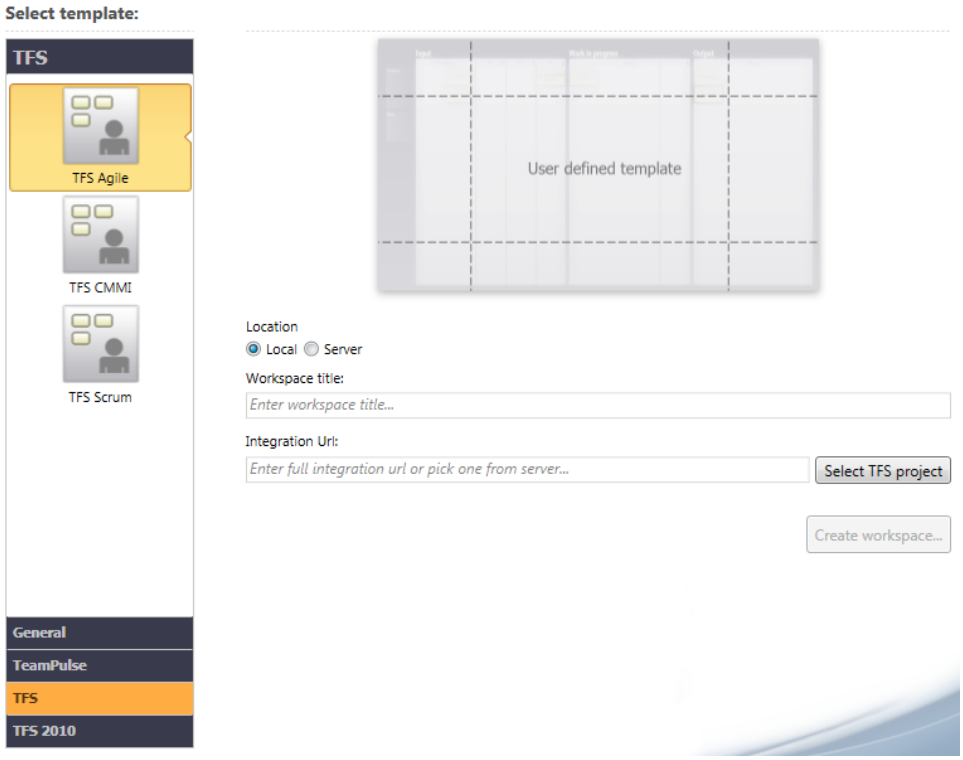
1. To start creating a board integrated with TFS, choose **File** from the top navigation menu.



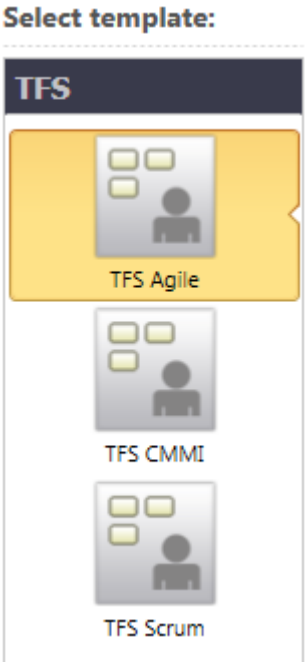
2. Select **New** from the list on the left.



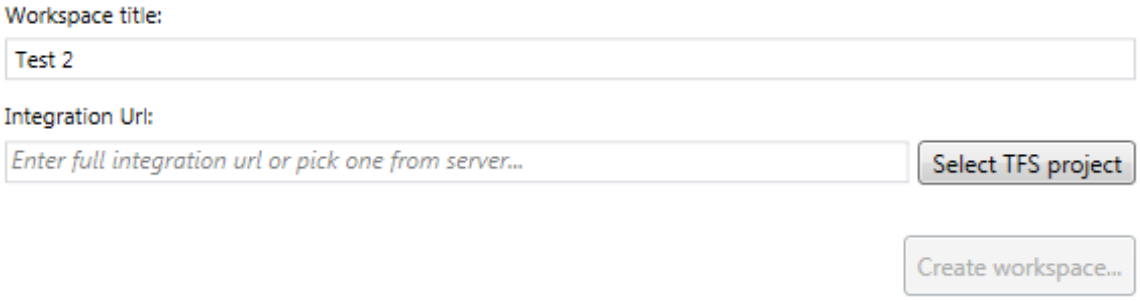
3. Select **TFS** group from the template menu.



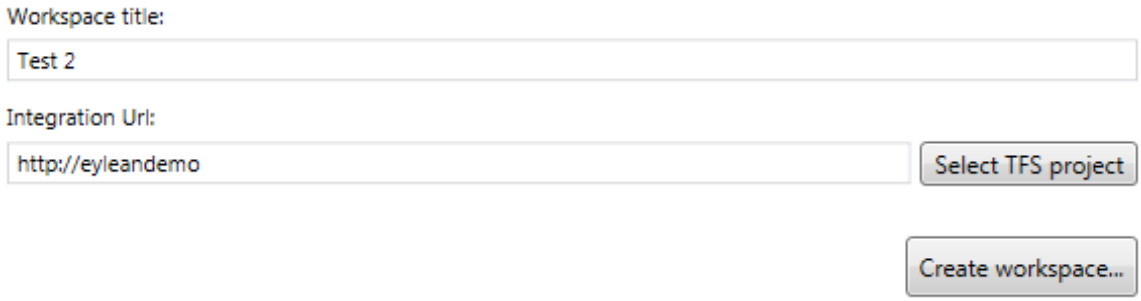
4. Select the template type.



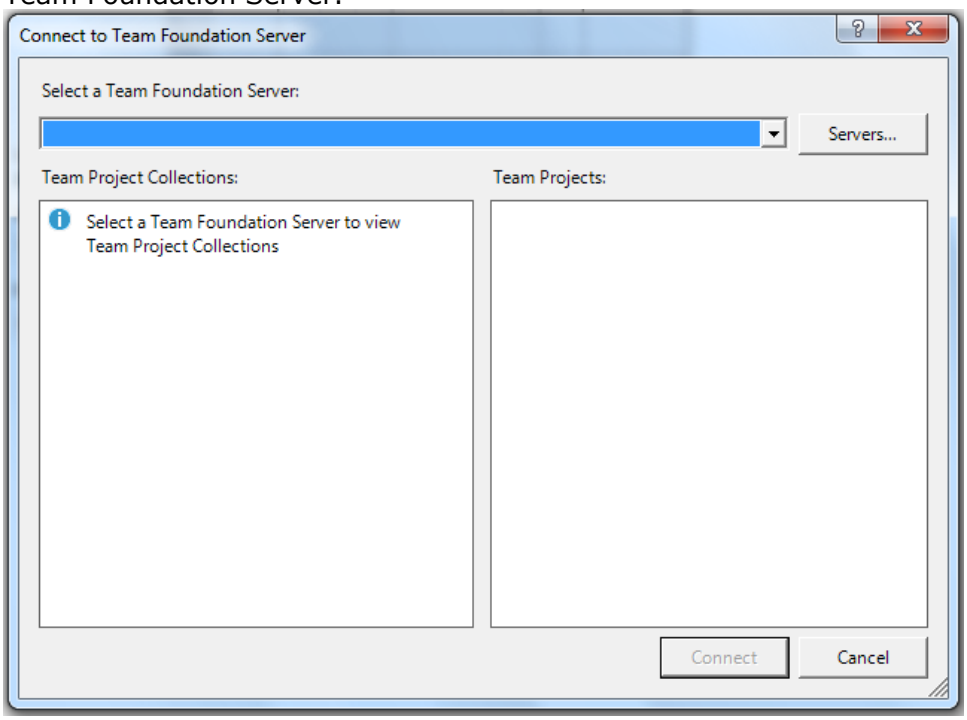
5. Name your new board by entering the title in the **Workspace title** field.

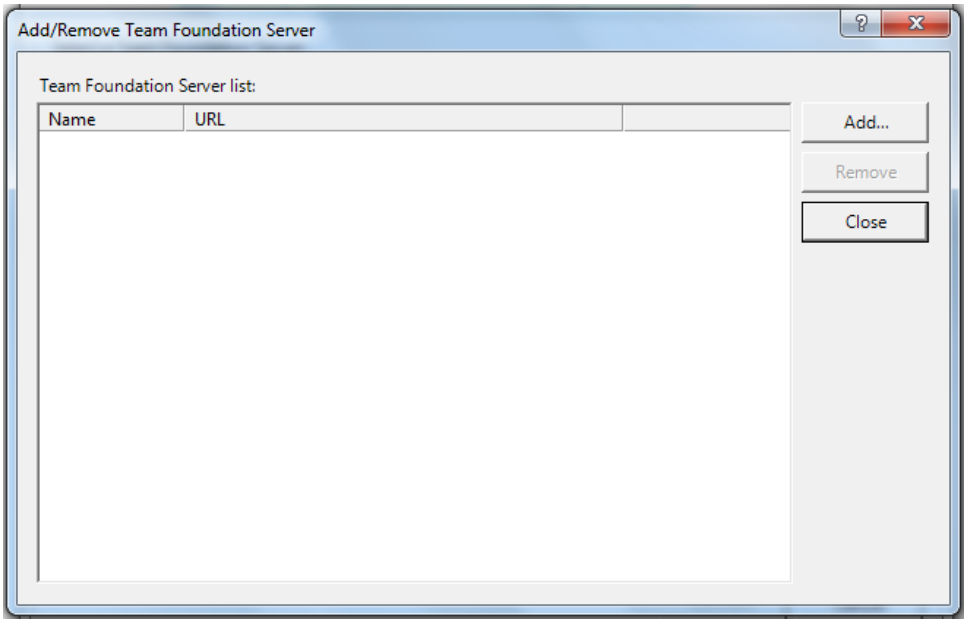


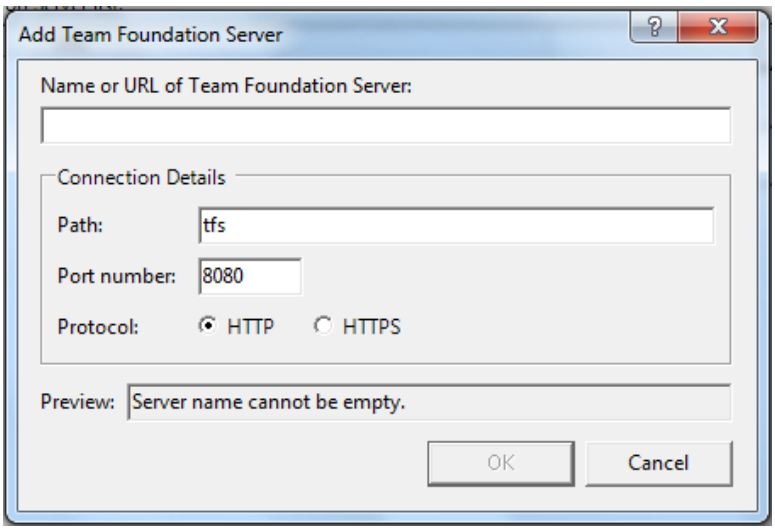
6. Provide an integration Url or click **Select TFS project** button.



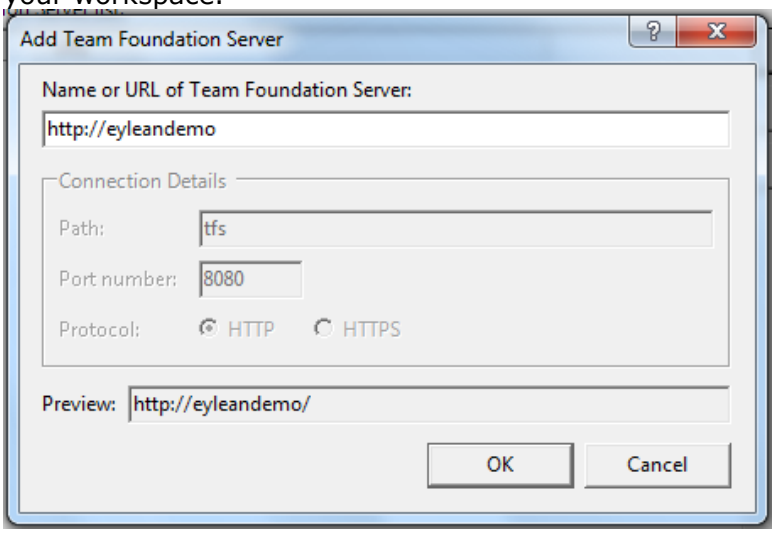
7. If you choose to click the **Select TFS project** button, follow the dialog box instructions to add Team Foundation Server.







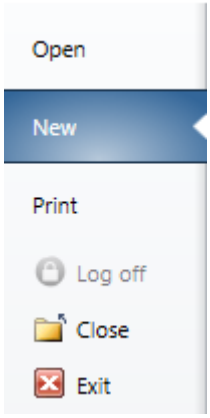
8. When you have specified the server path, select **OK** to finish adding an integrated board to your workspace.



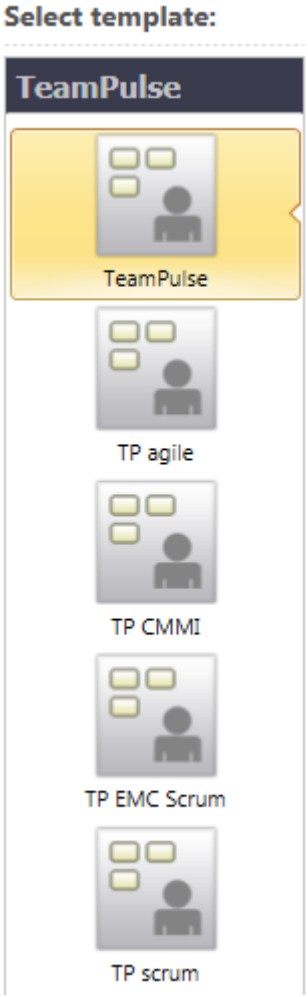
7.2. Create a Board Integrated with TeamPulse

1. To start creating a board integrated with TeamPulse, choose **File** from the top navigation menu.

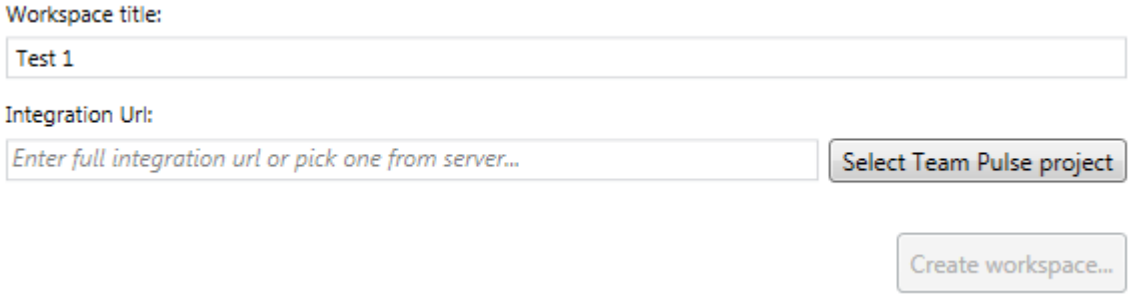
2. Select **New** from the list on the left.



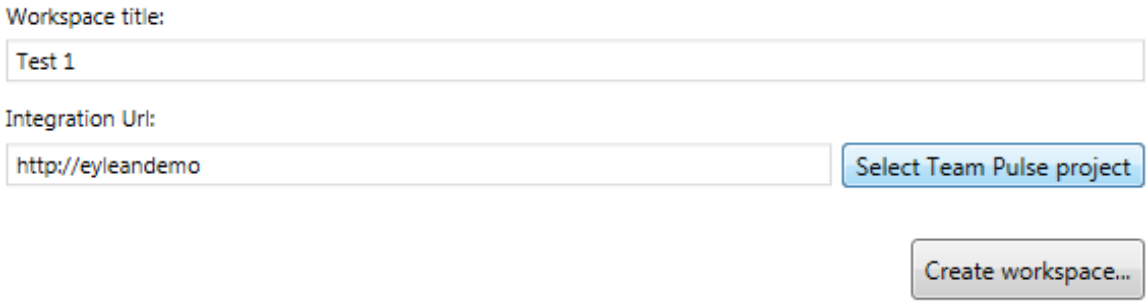
3. Select the **TeamPulse** group from the template menu and select the template type from the provided template list.



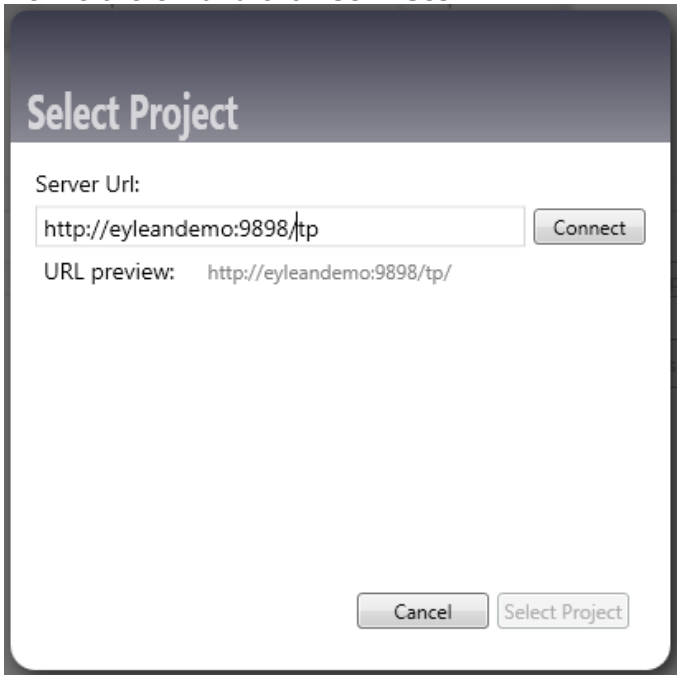
4. Name your new board by entering the title in the **Workspace title** field.



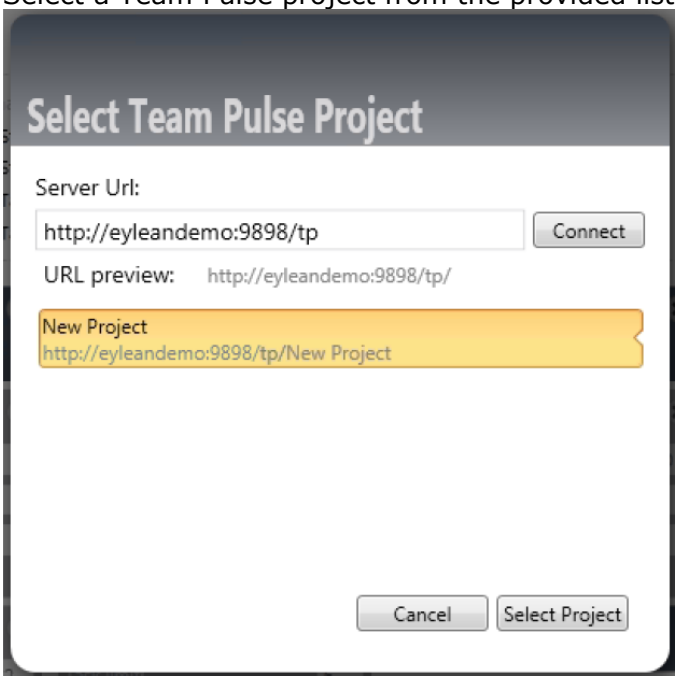
5. Provide an integration Url or click the **Select Team Pulse project** button.



6. Define the Url and click **Connect**.



7. Select a Team Pulse project from the provided list and then click **Select Project** button.



8. Finally, click **Create board** to add an integrated TeamPulse board to your workspace.