From developing instructional modules, to preparing for information literacy classes, to meeting with students, our work as instruction librarians is multi-faceted and the demands on our time are numerous. Whether working on individual tasks or team projects, the keys to success under these conditions are organization and time management. Without a system in place, tracking and juggling competing priorities can quickly become overwhelming. In this article, we will take a closer look at one particular methodology (Kanban) and a specific tool (KanbanFlow) that can help you control and manage your workload.

What is Kanban?

Kanban is a workflow system often used in manufacturing and software development to improve efficiency and productivity; however, it can be used equally effectively to keep any type of project on track or as a tool for personal time management. Originally developed in the late 1940s by Toyota in order to streamline and support their “just in time” manufacturing process, the methodology was later adapted by David Anderson as a tool in the Agile software development process (Anderson, 2010).

At its heart, Kanban (which according to the Oxford English Dictionary is the Japanese word for “sign” or “poster”) is a system that allows you to create a visual model of your work. Central to the methodology is the creation of a “board” onto which you place “cards” containing tasks that need to be completed. In its simplest form, a Kanban board contains three columns: To Do, Doing, and Done. As tasks move through the workflow to completion, cards are physically moved to the appropriate column on the board.

Also central to the Kanban methodology is the concept of limiting the amount of work in progress in order to focus attention and effort, thereby limiting the amount of time it takes to move individual items to completion and helping reveal any potential workload bottlenecks. So, while your “To Do” column might contain a long list of possibilities, your “Doing” column should be limited to only three or four items. New items may only be moved into that column when a space opens up through the transfer of an in progress item to the “Done” column.

A basic, physical Kanban board can be easily made by using sticky notes and a whiteboard, however a wide variety of online tools and applications have been developed to allow for creation of virtual boards. KanbanFlow is one such tool.

KanbanFlow

https://kanbanflow.com

KanbanFlow is an online tool that is available in both “free” and “premium” versions. The “free” version of the tool is actually fairly feature rich, allowing the creation of unlimited boards, tasks, subtasks, and team members. The subscription “premium” version is $5 per user per month and offers additional features including the ability to attach documents to your tasks, create “swimlanes” to split your board by team or topic, enable a search function (potentially useful if you have hundreds of tasks on your virtual board), as well as access to a variety of analytical tools and reports.

To get started with a free account, simply click on the green “Sign Up” button and provide your name, email address, and a password of your choice. After doing so, you will be taken to a default board (named “My first board”) containing four standard columns (To-do, Do today, In progress, and Done). You can either start working with and editing this board, or opt to create a new board customized to your needs and preferences (e.g., adding, deleting, or renaming columns).

Adding Tasks

Once you have created your board, the next step is to begin adding tasks to your “To-do” list. Do so by clicking on the green plus icon located in the “To-do” column header. This will open up a task window (see Figure 1) where you will name your task and provide an optional description. From here you may also create and assign task labels/categories, color-code your task, assign responsibility to a particular person, add a due date & time, and/or create subtasks. When complete, click on the “Save & close” button and the new task will appear in the appropriate column on your board. If you want to edit the task, simply click on it to reopen the task editor.
Managing Tasks

Once you have added some tasks to the “To-do” column, you are ready to start using the tool to manage your workflow. You can think of the “To-do” column as a gathering place for all of the possible tasks you could choose to work on at any given point in time. If your task list is anything like mine, it will likely be fairly lengthy, and it may or may not be prioritized. The next column, “Do today”, is where you identify and place the tasks that you intend to work on (and hopefully complete) today.

The next column, “In progress”, is where you are going to place the tasks you are actively working on. By default, KanbanFlow limits work in progress to three tasks (although this can be adjusted in the Settings to meet your preference; be cautious about increasing this limit, as you want to be realistic about how many tasks you actively can be “making progress” on at any one point in time). You can add tasks beyond this limit, but when you do so, the column header will turn red to alert you that you have exceeded your stated work in progress capacity. And finally, you will move your tasks to the “Done” column when they are completed. KanbanFlow will show only the last 20 tasks completed, after which they will be automatically archived.

To move a task between columns, simply drag and drop it into the desired location. This need not be a linear process; as priorities change, items can be dragged back and forth between columns as frequently as you require. Similarly, you can drag and drop items up and down in a column, which you might want to do as a means to establish an order of priority for items in your lists.

Another option for indicating task priority is through the use of colors. KanbanFlow allows you to use up to ten different colors (though brown and white are disabled by default) which you can rename to meet your needs. For example, you might want to rename “Red” to “Top Priority”. Alternately, you could use colors to indicate the type of task (e.g., “Research”, “Professional Development”, etc.). To change color labels, go to the “Administration” drop down menu, select “All Settings”, and then choose the “Colors” tab. From this menu, you can also set the default color for new tasks, enable and disable specific colors, and change their menu order.

Tasks can be further categorized through the use of labels. For example, you might use a label to indicate a larger project to which a specific task belongs. You add labels from within the task editing window by simply typing a new or existing label into the “Labels” box on the “General Tab”; you can assign more than one label to...
each task. Once labels are assigned, you can use the “Filter” functionality (located on the bottom left-hand menu) to show only tasks with the labels you specify.

For tasks that have firm deadlines, you can add due dates that indicate a date and time that a particular task should be moved to a particular column. This allows you to designate both start and end times for a task since you can indicate that an item is “due” to be in the “In progress” column by one date and in the “Done” column by a different (later) date. The due date itself will not appear on the board until seven days before it is due. You add due dates from the “Dates” menu in the task editing window. If a task is overdue (e.g., “Finish TechMatters article” was due by 2:00pm on Tuesday and it’s now 2:01pm), you will receive a “Task overdue: Finish TechMatters article” email notifying you of your tardiness, whether you are actively in KanbanFlow or not. Finally, if you have a task that needs to be performed on a regular basis, you can designate it as a recurring task by checking the “Repeat” option when assigning a start time.

Customizing Your Board

To be truly useful, a Kanban board should be customized to fit the workflow that makes the most sense for you and/or your team. To that end, KanbanFlow allows you to modify each board’s settings via the “Administration” menu. To do so, click on the “Administration” drop down in the upper right and then select “All Settings” for the board you wish to customize. From the “General” tab, you can rename your board (which you will probably want to do if you have been working with the “My first board” default template). It’s particularly important to name your boards if you decide you want one for each domain of work/tasks that you do (e.g., a “Personal” board for personal tasks; a “Work” board for work tasks).

Next, navigate to the “Columns” tab in order to add, delete, or reorder columns, rename columns to match your workflow, and edit settings for individual columns. For each individual column, editable properties include column name and description, options for automatic display of task metadata (i.e., expanded descriptions, labels, subtasks, and due dates), archiving options, and work in progress limits.

Also customizable are the default settings for new tasks, which you will find on the “Task settings” tab. Here you can set a default color, indicate who should be designated responsible for a new task (i.e., no one, the task creator, or a specific individual), set a standard due date time, and indicate the position of new tasks in a column (i.e., top or bottom).

Finally, should you wish to use your board to manage collaborative projects, you will want to provide access to the other members of your team. From the “Users” tab, simply click on the “Invite user” button and provide the email address of the individual(s) you want to add. If an invitee does not already have a KanbanFlow account, s/he will need to set one up before accepting the invitation and accessing your board.

Manage Your Time

The Pomodoro technique (see: https://cirillocompany.de/pages/pomodoro-technique) is a time management method intended to help you maintain focus while working. The basic approach is to identify a task that requires your attention, set a timer for 25 minutes and commit to working on it without interruption. When the time elapses, you reward yourself with a short 3-5 minute break and then repeat. Every four cycles, you reward yourself with a longer 15-20 minute break.

Figure 2: Stopwatch Timer

How it looks before you hit Start; and how it looks once you’ve selected a task and started keeping track of time.
Because both Kanban and Pomodoro are systems focused on task completion, they easily can be used together to improve productivity. To that end, KanbanFlow incorporates a Pomodoro countdown timer that you may access by clicking on the “Timer” button located in the lower left-hand corner of the board. Alternately, you can enable a “Stopwatch timer” (see Figure 2 on alternate page) that will simply count upward indicating the amount of time you have been working. Before you start the timer, you have the option of indicating which task you will be working on. Once you do so, your time on that task will be logged so that you can later use that information to evaluate and improve your efficiency.

Conclusion

Given the diversity of tasks and broad scope of the typical instruction librarian’s workload, effective time and task management are a necessity. To that end, the Kanban methodology is a relatively easy to implement system that can be used to maximize your work time and improve efficiency. Fortunately, KanbanFlow is an easy-to-use, freely available, online tool that will allow you to quickly get started with this approach to time and project management so that you can gain control of your task list and focus your energy on working to impact student learning and success.

References


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