Advanced Customization
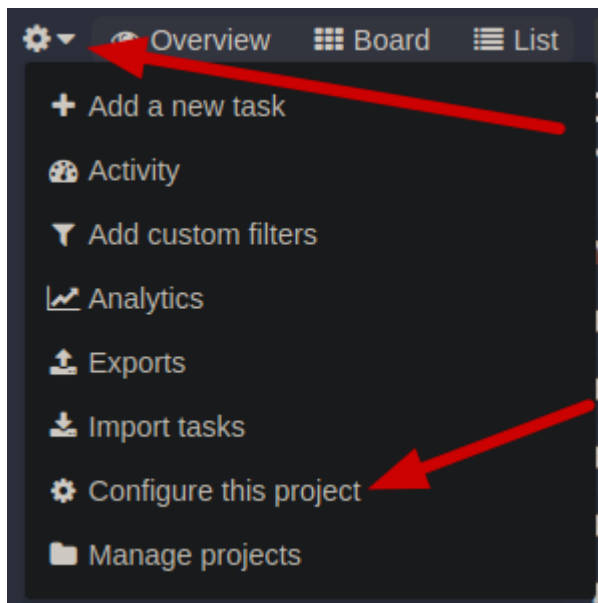
- Dashboard/Board View Customization
- Reoccurring Tasks and Automated Actions
- Analytics
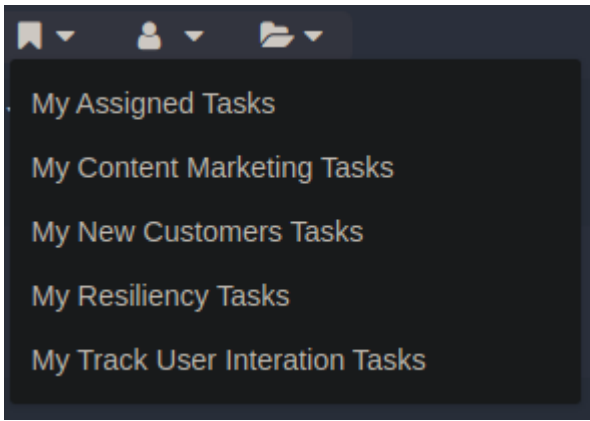- Plugins

Dashboard/Board View Customization
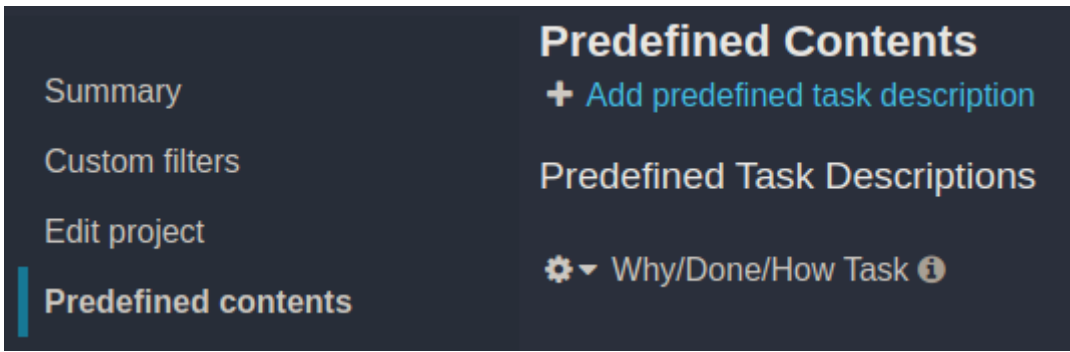
Board Customization

Custom Filters

Searches that you can share among the team. They look just like regular filters that you can share with the rest of the board:

Predefined Content

These are templates that can be used for tasks to give a pre-defined title and description. These are best for when a certain type of task has various sections that need to be defined.

The title will be the name of the predefined content, and it is available underneath the description of any new task.
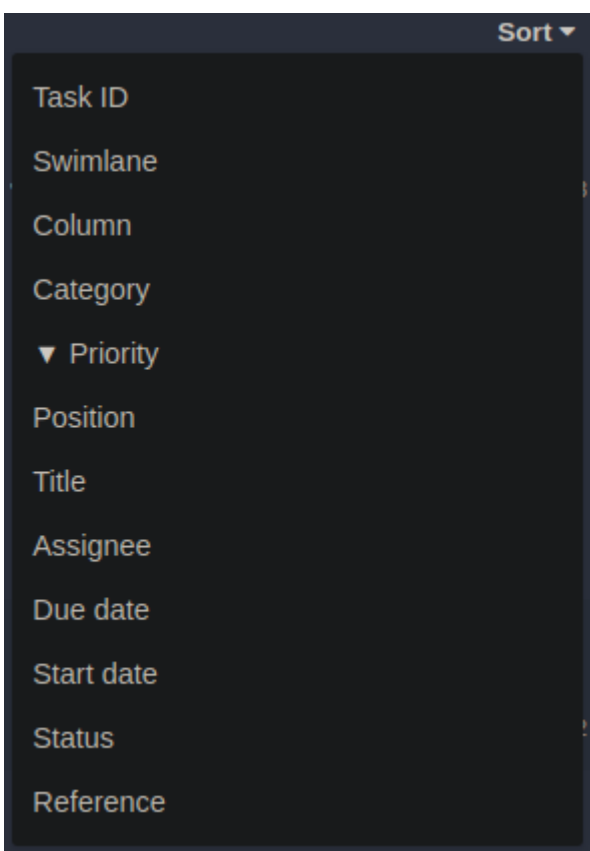
Dashboard

Tasks are shown on the dashboard based on which column they're in on their respective boards. Columns can choose to be either "Visible on the Dashboard" or not:

Edit the board for "OurCompose"

+ Add a new column

Column	Task limit	Visible on dashboard
✛ ⚙▾ Backlog	∞	No
✛ ⚙▾ Planned	∞	No
✛ ⚙▾ In Progress	∞	Yes
✛ ⚙▾ Waiting	∞	No
✛ ⚙▾ Review	∞	No
✛ ⚙▾ Pending	∞	No
✛ ⚙▾ Done	∞	No

Sort Tasks in the Dashboard:

Sort ▾

Task ID

Swimlane

Column

Category

▼ Priority

Position

Title
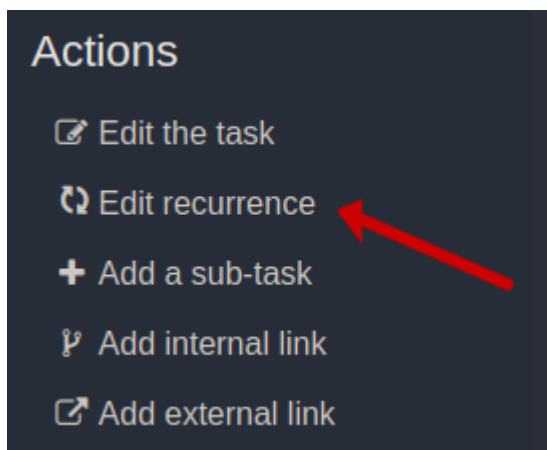
Assignee

Due date

Start date

Status

Reference

Note that any changes to this survives a refresh, because the parameter is in the URL. If the page is opened up in another tab/window/etc. without the parameter, it will default back to Priority.

Reoccurring Tasks and Automated Actions

Laundry. Team Meetings. Workouts. All of these things (and more) happen over and over again on a predictable schedule, and unlike habits (like drinking enough water every day) it is preferable to get reminders about these types of things. But I don't want them to clutter up my board until it's time to do them. So, no what?

Reoccurring Tasks

https://docs.kanboard.org/en/latest/user_guide/tasks.html#recurring-tasks

On every task detail page, you can choose to edit the reoccurrance:

Trigger

90% of the time this is going to be when the task is moved to the last column.

Factor and Timeframe

Get used to calculating weeks in double-digit numbers. The only options here are:

- Days
- Months
- Years

But they work perfectly.

PROTIP: If you need something to repeat on an odd cadence, find the cycle that the task repeats at, and make one that reoccurs at that interval at each of the start dates in between the first and the last occurrence.

For instance:

- Week 1: Monday - Type A
- Week 1: Wednesday - Type B
- Week 1: Friday - Type A

- Week 2: Monday - Type B
- Week 2: Wednesday - Type A
- Week 2: Friday - Type B
- Week 3: Monday - Type A
- Week 3: Wednesday - Type B
- Week 3: Friday - Type A

The cycle here is "Week 1: Monday" to "Week 3: Monday". There would be three start dates: "Week 1: Monday", "Week 1: Friday", "Week 2: Wednesday". They would all have a recurrence of two weeks. This way I get tasks for the "A" type on all of the "A" days, which are indistinguishable to me, but under the hood there are three tasks that are in constant rotation.

Base Date

1. If it's laundry or garbage and the time it needs to get done is based on when it was last done, calculate the due date from when it's moved to the last column
2. Otherwise, if it's a scheduled meeting or workout, keep the date pegged by calculating from the existing due date

Automated Actions

This could be a potentially large section, so I'm going to point back to the official documentation and give some ideas for what we've been able to setup to make our own lives easier ourselves.

[https://docs.kanboard.org/en/latest/user_guide/automatic_actions. html](https://docs.kanboard.org/en/latest/user_guide/automatic_actions.html)

As you will see here, most of these are actually driven and constrained by culture and process requirements. This (of course) means that these will differ widely in each specific implementation, and should be taken only as guidelines.

All Tasks in a specific Swimlane are the same color and priority

By using a mix of assigning a priority and assigning a color during task creation and moving tasks to another swimlane, we get to have all of the tasks in our swimlanes the same color and priority, whether it's a new task, or one that got moved.

All Recurring Tasks are moved out of the Backlog to Pending until their Due Date, then are put into WIP

Since moving columns specify source and destination columns, we can target all tasks in the Backlog column to be put into Pending if they have a due date within 14 days. This means that all tasks without a due date are not touched. (All of our recurring tasks have due dates).

Then, on day before the due date of tasks that are in Planned **OR** Pending, they are moved to WIP (the column that is represented on the dashboard).

Tasks in the Done column stay open for 20 days and then Close themselves

The "Close Task" automated action is easy enough to set, you just have to know what to do with it. For us, we let tasks hang out in the Done column for 20 days, and then have them close themselves. This is because we don't want them cluttering up our Done column after they've become irrelevant. Since we have review meetings every 2 weeks, this gives us that timeframe plus a little leeway in case we get delayed. Also, the default search ignores all closed tasks, so we don't see them once that happens.
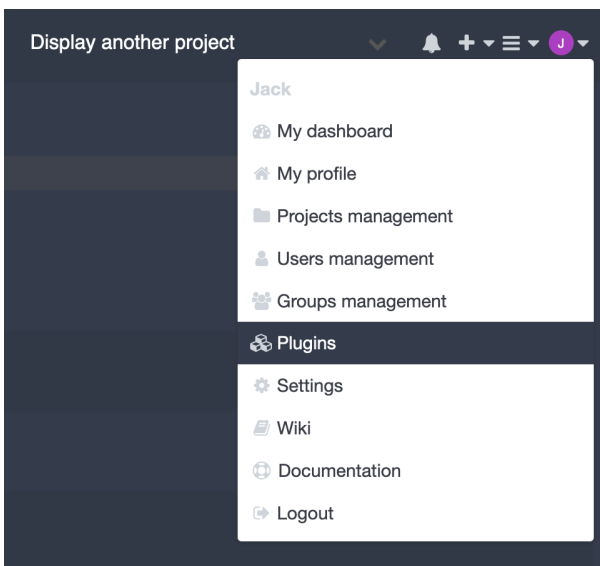
Analytics

Plugins

- Plugins Link

There is no approval process and code review. This is up to you to validate the compatibility of these plugins with your Kanboard instance.

Kanboard comes out of the box as a very basic kanban implementation. It's plugins allow for both greater flexibility and usability of the tool as a whole. I have broken down the plugins into the following categories: functionality, webhooks and communication, authentication, and themes. Please checkout the link of plugins above for the full list.

Getting to Plugins:

Top right - click on your profile to get to the drop down and click plugins:

Functionality

The favorite functionality related tools we have and use on the OurCompose Board include the SubtaskDueDate and Group Assign. The other functionality related plugins out there I found interesting included third party storage and plugins around collecting more metadata.

SubtaskDueDate allows us to assign due dates to subtasks - This is useful for longer running tasks where subtasks end up turning into smaller less complex, but still important tasks that need to be tracked.

The Group_assign plugin allows multiple assignees to be assigned to a single task.

Webhooks & Communication

At OurCompose we don't use webhooks and communication related plugins for the board, however there are quite a few plugins that are worth mentioning: Matrix, Hipchat, RocketChat, Telegram, SynologyChat, etc. The list for these goes on and on. Along with these communication related plugins, there are webhook plugins for talking with git based hosting providers. This list includes making webhook calls for BitBucket, Gittea, Gitlab, Github, and Gogs.

We looked into implementing Gitlab webhooks with Kanboard, but the hassle was much more than the reward. We are still looking into this to track issues and automatically closing tasks based off of where tasks are in the board, but right now internally managing tasks has worked well for us.

Authentication

The list of plugins for authentication include: CAS, Github, Gitlab, Google, IMAP, Reverse Proxy. Kanboard also has a two factor plugin for SMS two factor authentication, securing down the board. We use regular kanboard user and group management, but these provide centralized management from an authentication provider.

Themes

How could I not mention themes when talking about kanboard plugins. Kanboard by default is not the prettiest board software on the market. With its white background and cards I really can say I don't care for the default theme. Good news is that there are a few really good themes out there and even a full on customizer theme for taking care of the view of the board. I would highly recommend nebula, moon and essential! These were three of my favorites that are out there. With the ability to use the Customizer plugin to trick out everything, adding logos and default images for the background can really make your board your own.

Integration Session: https://youtu.be/ntq4E0adFg8