Everyday Usage

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Assignee/State Workflow

The assignee of a task is the person who is responsible for the task at the point it is at currently. While there are several states that a task can be at, there is only (in all reality) one person who is responsible for moving that task out of where it currently is.

The state of a task is the part of the process that the task is currently in. See the Initial Customization chapter for more details on its setup.

Examples

Function needs to be coded

BRAD is coding this function - ASSIGNEE: BRAD, STATE: WIP

This task is assigned to BRAD. That means that BRAD is currently (or presently going to be) writing the code to accomplish X. Now, maybe BRAD is in charge of writing the code, but his manager needs to verify that his code works. That's fine. However, as long as BRAD is working on the code, it will be assigned to BRAD. As soon as that code is ready to be reviewed, we move on to a different state.

BRAD is done coding this function - ASSIGNEE: BRAD's Manager, STATE: REVIEW

When BRAD is done coding up and testing this function, he moves this to "Review", and assigns this task to his manger. This means that it's time for his manager to review this function. At this point, his manager may move this task back into WIP if he thinks it needs more work, and reassign it to BRAD, or move it into DONE if this task is done to his satisfaction, and is production-ready.

Sales copy needs to be written

KEVIN is writing the sales copy - ASSIGNEE: KEVIN, STATE: WIP

Kevin needs to write a sales copy. He sits down at his desk and pounds out a good letter that he thinks will inspire his readers to buy his company's product.

KEVIN's Manager Reviews his Sales Copy - ASSIGNEE: KEVIN's Manager, STATE: REVIEW

At this point, Kevin's Manager reviews the copy that Kevin has written. However, he doesn't think that the sales copy is good enough to produce and send to outside sources. So he makes corrective notes for KEVIN to fix before he sends it out. These notes are put in the Task's comments; the tasks is re-assigned to KEVIN, and put back into WIP/Planned.

KEVIN re-writes the Sales Copy - ASSIGNEE: KEVIN, STATE: WIP

KEVIN goes back and makes the changes based on his Manager's review.

KEVIN's Manager Approves his Sales Copy - Assignee: Kevin's Manager, STATE: REVIEW

The task is in review again, but this time KEVIN's manager approves his sales copy. At this point he passes it off to whatever process is after the writing and review stage, which is outside of his control. However, he is the ultimate source of review of the sales copy that proceeds from his department.

Project Scope

Teams

Projects can mean multiple things to multiple people. For us at OurCompose, we divide our projects into two broad scopes, development and sales. This way we are able to put all of our tasks under one of the two buckets or projects. This allows us to know the context we operate in when completing a task. The scope of any project isn't limited. There is no cookie cutter for defining a project. The two boards for us have a very broad scope. They have swimlanes that reduce scope and determine criticality, but other than that - we have the two boards. At OurCompose we use categories defined within tasks very well. I would say that is how we are able to get away with such broad projects.

Within our board at OurCompose we use comments extensively. These are helpful for warm handing off tasks to other team members, and for when reviews need to be completed. Comments are able to be written to both determine when and where to move forward.

Personal Use

As a personal user of kanboard, I like having multiple projects and reducing scope down on a project basis instead of using categories and tags. It helps me immediately understand what context I need to be in to start working on the task. As an example of these different projects, I have Music, Homelab, AI, and Meta. Under these different projects I have different swimlanes breaking down scope even further. Taking my music board I have, I have a Default Swimlane, a Songs Swimlane and a Theory Swimlane. This allows me to immediately understand what I am going to take away from the task or what "I" am looking for to complete the task. The task I have defined in the song would be simply "Song Name" - I don't add a crazy description, maybe a link to the song, and a tag for the instrument, "Guitar" or "Keyboard."

Going off the Personal board example, I generally use very light titles, descriptions, and comments. I would almost go so far to say I use most tasks as place holders so I don't forget when I come back to these items in the future.

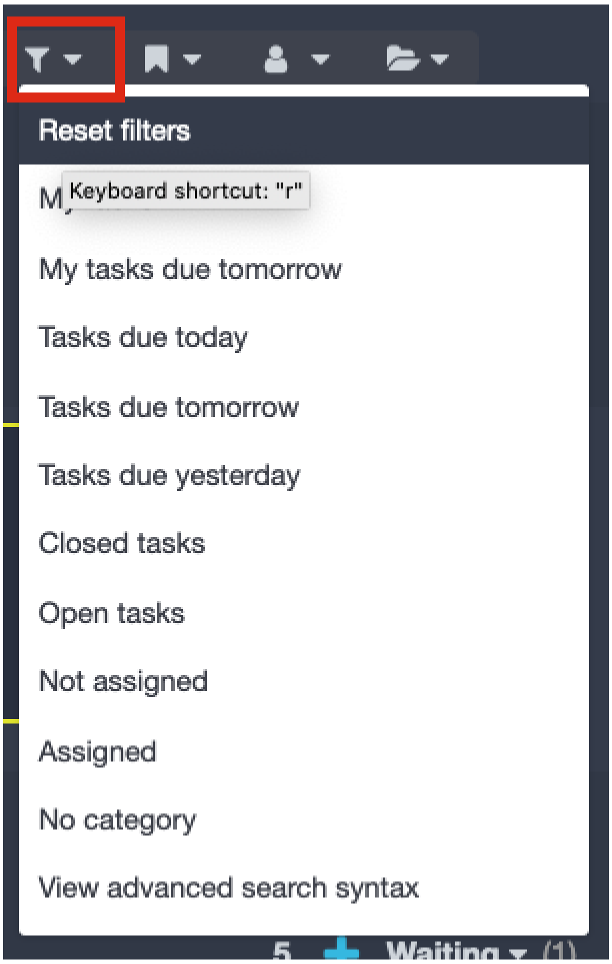
With the personal instance and multiple boards, I would highly highly recommend starting with one board to get a feel of everything going on using tags and categories first. It is easy to get lost in multiple projects and easy to move complex tasks over underestimating complexity. When you move to multiple projects, the dashboard view provides a great overview of what tasks are currently in progress and currently in planned.

Search

Kanboard uses a simple query language for advanced search.

A link to the direct documentation can be found here

The documentation below will show some of our most regularly used searches and what we find useful. Getting started right off the bat, Kanboard provides a list of useful filters to use. These can be found using the filter button next to the search page as seen in the screenshot below:



To jump into search here, we have the search open tasks by *Assignee*. This allows me to filter all open tasks for a specific user. The *status* checks the status of the task to prevent showing old or stale tasks on the board. Kanboard also provides the ability to search for your own assigned tasks using the *Assignee:me* filter. When I am feeling lazy, I end up using the manual search over the filter by me (this is more due to personal preference as both work). Either option works for filtering tasks assigned to yourself.

The other main search I use is searching by *tag* - Searching by tag allows me to filter broader themes while looking at tasks. Filtering by tasks allows me to understand the content I need to complete around a specific group of tasks. In the example below I am looking at all open tasks tagged "Content Marketing"

The last major filter we use on our board is around complexity to ensure all tasks are complexitized and accounted for properly. We find all open tasks without a complexity to ensure they are properly marked, and this also helps us measure our workload over the next two week period. Below is an example of searching for tasks that don't have a complexity.