

Initial Configuration

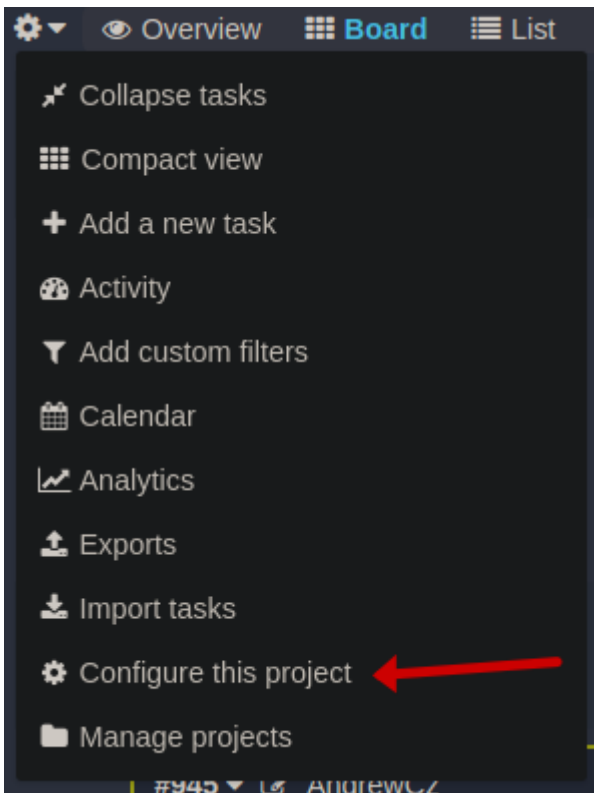
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Columns and States

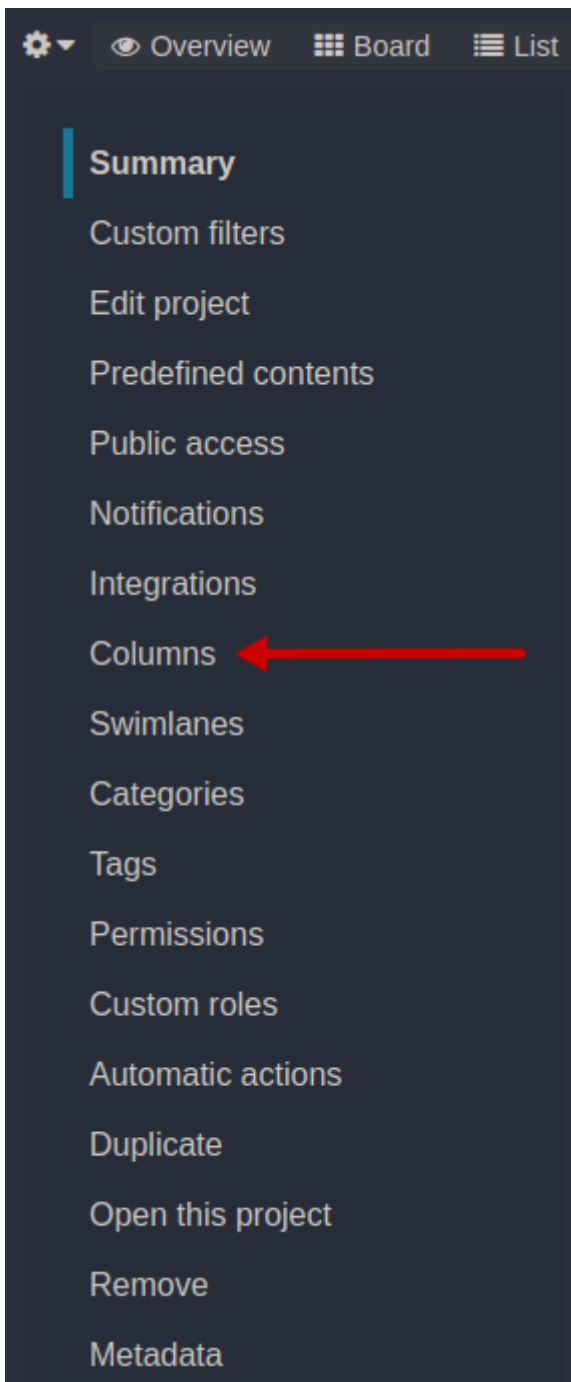
The single most important thing to configure are the states of a board, indicated by the columns.

Setup

The setup is done on the "Configure this project" section:



Then, follow the link to the Columns:



Here you can add a new column and/or reorder the existing columns:

Edit the board for "OurCompose"					
+ Add a new column					
Column		Task limit	Visible on dashboard	Open tasks	Closed tasks
<input checked="" type="checkbox"/> Backlog		∞	No	97	0
<input checked="" type="checkbox"/> Planned		∞	No	5	2
<input checked="" type="checkbox"/> In Progress		∞	Yes	10	1
<input checked="" type="checkbox"/> Waiting		∞	No	2	0
<input checked="" type="checkbox"/> Review		∞	No	0	0
<input checked="" type="checkbox"/> Pending		∞	No	4	0
<input checked="" type="checkbox"/> Done		∞	No	23	260

You can also change the column names, edit the dashboard visibility, and delete the columns using the gear option next to their names. These are the basic requirements for configuring the columns.

Configure

The process workflow usually has a superset of the following states, meaning that these are the basic states that most boards contain in one form or another:

1. Todo
2. Doing (Work in Progress/WIP)
3. Done

This is a fine setup in and of itself. However, adding a couple of states makes the workflow much more flexible and robust. The recommended setup for any general board is as follows:

1. Backlog/Ideas
2. Planned/Prioritized
3. In Progress/Doing
4. Waiting/Follow-Up
5. Review/Testing
6. Pending/Time-activated
7. Done

There are a couple of other default setups that can be used for other applications. For instance, for a CRM/Sales Pipeline:

1. Backlog
2. Initial Contact/Offer
3. Consultation/Requirements Documentation/Negotiation
4. Development
5. Demo/Acceptance Testing
6. Delivery/Invoicing
7. Closed

Or the original use for it, an Inventory Management system. This system uses two boards, one to track the lifecycle of the inventory, and one to keep track of the stock on-hand.

Order Board:

1. Order Recieved
2. Picked, Packaged, Postage'd
3. Currently Shipping
4. Delivered

Inventory Stock Board:

1. Sold
2. To Order
3. Waiting
4. Recv'd

I will go into a detailed explanation of this on another page.

References and Relevant Links

[Kanbanize - 32 Practical Kanban Board Examples](#)

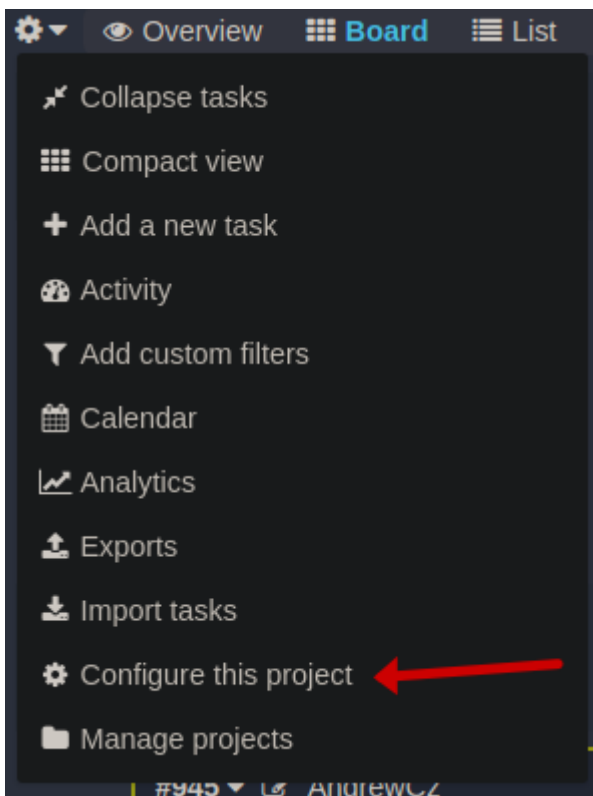
Rows and Swimlanes

Rows - known colloquially as swimlanes - are used to break up the tasks on the board in one of several ways; however makes sense for the particular type of board.

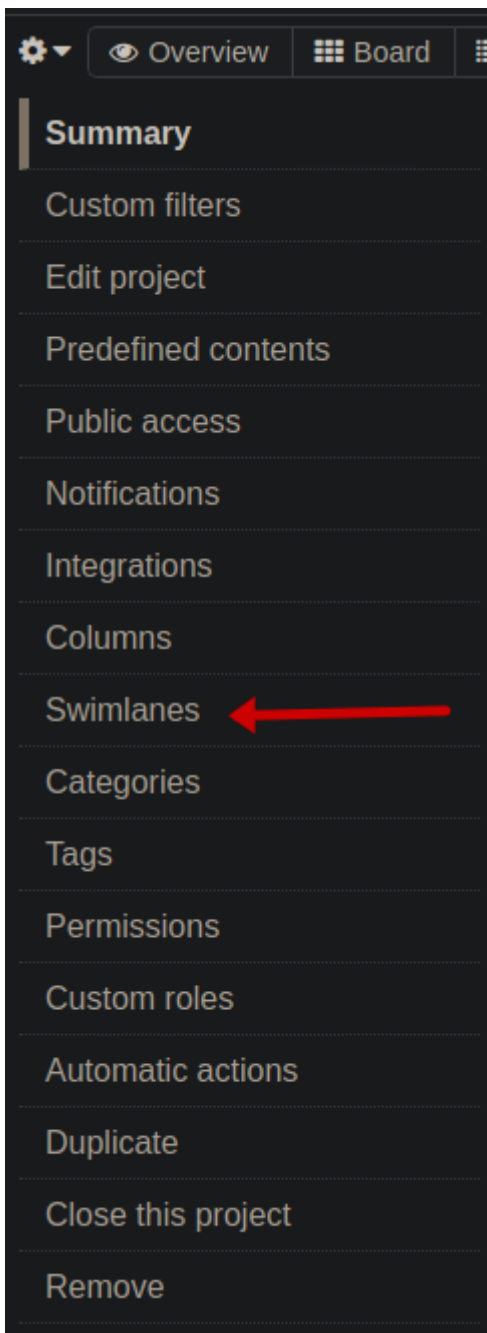
[Kanboard User Docs](#)

Setup

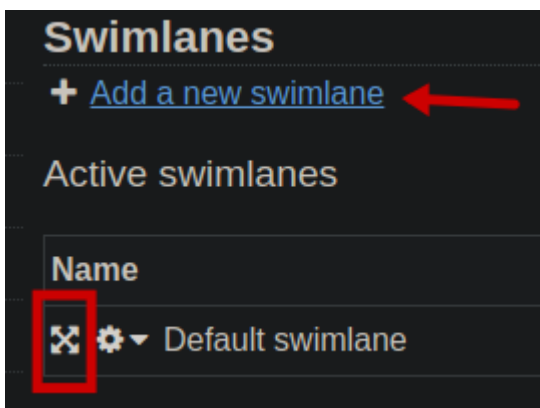
Configure this project



Go to the "Swimlanes" section



Add, delete or edit a swimlane:



Configuration

There are a couple of rules of thumb when it comes to swimlanes. Use these to indicate priority, with the higher priority towards the top. Don't use these to split up tasks by Assignee - that's what the assignees and filters are for.

Here is the most basic swimlane setup, from top to bottom:

1. Critical
2. Everything Else

Here is a bit more granular setup with four swimlanes that breaks repetitive work into a "Maintenance" swimlane, and splits up "nice to have's" into a column called "Improvements", and bugs/issues/problems into another swimlane called "Incidents".

1. Critical
2. Incidents
3. Maintenance
4. Improvements

Similarly to the most basic setup, you can categorize your swimlanes by visibility:

1. External Projects
2. Internal Projects

This setup is intended to be worked from top to bottom, with tasks moving from the last column of the higher swimlane into the first column of the lower swimlane:

1. Onboarding
2. Initial Review
3. Ongoing Touchbases

Swimlanes are the most efficient way to categorize tasks on a board according to priority or type of task, but I would caution against using them to indicate things that other aspects of the task are meant to indicate (See: Categories, Due Dates, etc.)