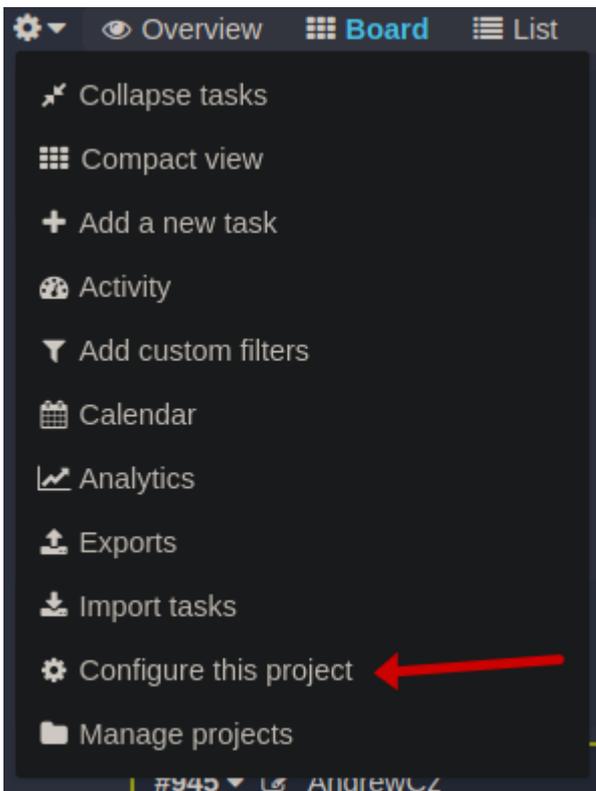


Columns and States

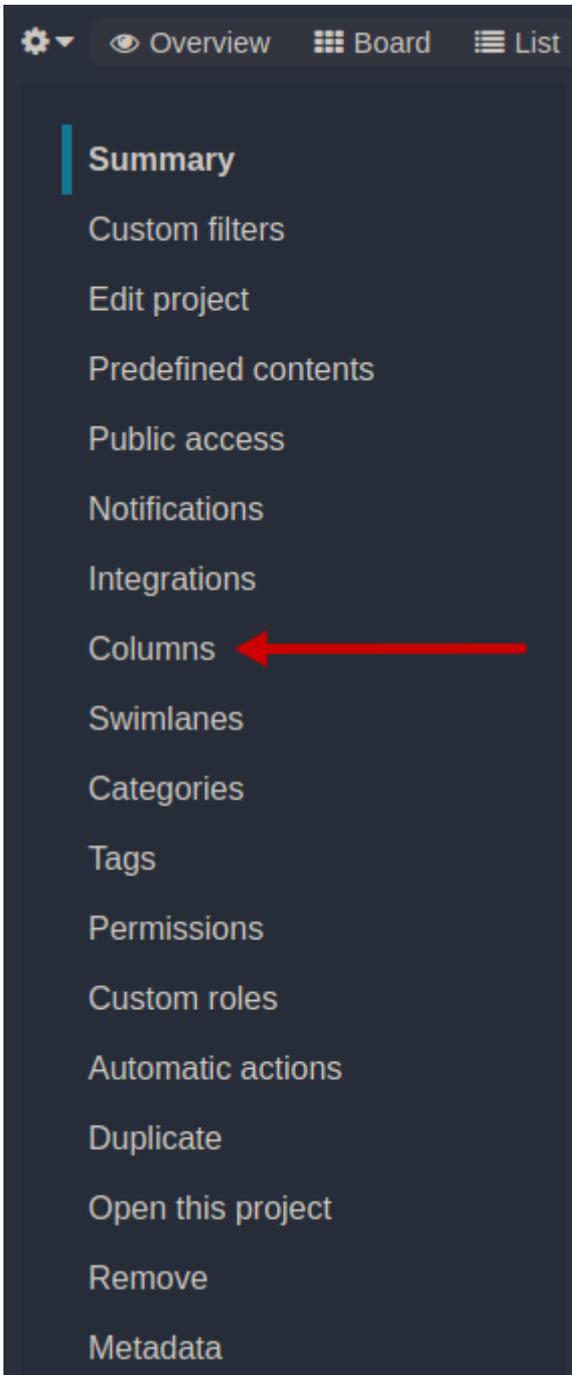
The single most important thing to configure are the states of a board, indicated by the columns.

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
☒ ☒ Backlog	∞	No	97	0
☒ ☒ Planned	∞	No	5	2
☒ ☒ In Progress	∞	Yes	10	1
☒ ☒ Waiting	∞	No	2	0
☒ ☒ Review	∞	No	0	0
☒ ☒ Pending	∞	No	4	0
☒ ☒ 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.

Revision #4

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