Overview

The Kanboard software is meant to track ***what tasks*** are in ***which state***. A good introduction can be found at Kanboard's documentation site.

This software is supposed to give us an overview of the tasks we have at any point in time, the team member who is responsible for each task as it is currently situated, and the requirements for what it will take to complete each task.

There are several key indicators for any task when it gets created:

- **ASSIGNEE:** The person who is responsible for taking action on the task as it stands right now
- **STATE/STATUS:** Whether this task needs to be worked on, reviewed, or followed up on
- **DESCRIPTION**: The initial rationale or reason for a task to be done; This should describe the desired outcome, and a high-level outline of what it might take to get there.
- **DUE DATE**: A date field for this task; Typically used to indicate that a task needs to be completed by a set date, or that an event related to the task will be occurring on a set date
- **START DATE:** A date field for the task; This is used to indicate when the task will start;

There are also several option fields that can provide valuable information on a given task:

- **PRIORITY**: This is how urgent it is that the task gets done.
- **COMPLEXITY/TIME ESTIMATE**: This provides an up-front way to show how much work will be required to complete the task.
- **CATEGORY**: This is a good way to indicate that this task is part of a bigger project or linked to other tasks somehow in a logical grouping.

All of these will be explained in depth in further pages of this book.

Board Scope

A board should be scoped out to only include what makes sense to include on it. There are a couple of guidelines to follow when considering when to make a new board, and what to include on that board:

- Does the same workflow apply?
- Are the same group of people going to use the board?
- Is the same visibility (public/private) needed?

If the answer to any of these questions is "No", then a new board should be created for the project under consideration.

Workflow

Columns/States

The basic workflow consists of several columns to indicate the state of the task. Typically a task is moved from the left-most column to the right-most column as it progresses through the states. The most basic setup consists of three states:

1. Todo
2. Doing
3. Done

This can be expanded, renamed, and altogether mangled based on the project requirements. A further discussion can be found in the "Initial Configuration" section.

Rows/Swimlanes

These are the horizontal rows in which tasks can be categorized. A good rule of thumb is that tasks that are put into swimlanes on top are in some way more important that tasks that are put into lower swimlanes. While these are not strictly necessary, a basic board should start with at least two swimlanes:

1. Critical
2. Everything Else

This serves to highlight the old adage that "If everything is critical, then nothing is critical", and forces the users to a modicum of prioritization right from the start.

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