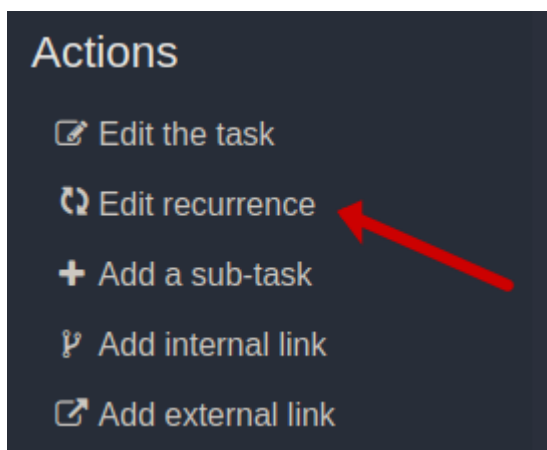


Reoccurring Tasks and Automated Actions

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 reoccurrence:

Edit recurrence

- Recurrent task is scheduled to be generated
- This task has been created by: [#1402](#)

Generate recurrent task

Yes ▾

Trigger to generate recurrent task

When task is moved to last column ▾

Factor to calculate new due date

14

Timeframe to calculate new due date

Day(s) ▾

Base date to calculate new due date

Existing due date ▾

Save or cancel

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

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.

Revision #3

Created 13 December 2020 00:36:49 by andrewcz

Updated 6 January 2021 05:53:30 by andrewcz