Work with Boards

Video: Work with boards

Board Basics

The lowest level of work to be done can be represented by a card that individual team members can take responsibility for. A board can be used to plan the work and visualize progress. Each card contains information about the task to perform, who is assigned to it, and the current status. The status of a card is represented by which status column the card is located. Cards are moved from left to right as work progresses, and when the work is done, the card is placed in the last column to the right. The default columns are Planned, Working on, and Done, but columns can be added or renamed to support your way of working.
Do you want to know when cards are put in a specific status column? Use Zapier to get an email notification!

Find Your Way Around the Boards Tool

Activities connected to the board are found on the **Boards** tool.

1. Click the **Activity** icon to connect to an activity from the board.
2. Click the **Filter** icon to open the panel to filter cards.
3. There are two main views that you can select; a **board view** where the lowest level of work to be done are represented by visual cards, and a **chart view** to follow up on progress in different ways.

4. Click a card to see the card's detail pane including important information about the task represented on the card. You can also comment and discuss the work to be done allowing you to keep all communications and information in one place. You can select multiple cards using the Shift or Control keys. Learn more about working with cards.

5. Group cards from different perspectives depending on your needs. You can group cards on the **Boards** tool by **Label**, **Assignee**, **Due date** or **Activity**. Each group is represented by a horizontal swim lane. **Note**: If an activity associated with a board is marked done, any cards related to that activity are no longer visible on the board.

6. To customize a board to fit your way of working, select **Settings** from the options menu to edit the workspace **name**, **columns**, and **labels**. The options menu also allows you to **duplicate**, **share**, **import cards**, **download**, **hide**, **delete boards**.

7. Maximize the board view to be able to view more cards at once.

8. Select from the boards available in the workspace.

9. Click the **Add board** icon to create a board.

Do you have Boards in the Boards list you don’t use anymore? Hide them to make the list shorter!

**Swim Lane Attributes**

If a card is moved from one swim lane to another (using the drag and drop method), the card's attributes will change to the attributes of the new swim lane. In the example pictured below, the card's assignee is changed when it's moved from one user to another.
Another example, illustrates, in the image below, a change in the card's label name and color:
See and Update Activity Details from the Board

1. When cards are grouped by Activity, the Board will be organized into multiple horizontal swim lanes. (See Item #5 in the Find Your Way Around the Boards Tool image above).

2. Click an activity name to open the Activity detail pane which will appear on the right side of the window. You can update the Activity’s details directly from the Boards tool in the same manner as if you were working from the Activity detail pane from the Plan tool.

Learn more about Activities and the Plan tool by visiting Work with the Plan.

Collapse and Expand Columns on Boards

When a board contains a large amount of information, users may collapse any of the board’s columns to hide their tasks to better visualize other columns within the board that are important to focus on.

To collapse a column on a Board:
1. Click the **Collapse** icon (located within the column header) of the column you want to collapse. Users can collapse as many columns as they prefer as long as there is at least one column that remains visible.

2. Click the **Expand** icon (located within the column header) of the column you want to expand.

3. Collapsed or hidden columns will still show some metadata about the column:
   - Status (column) name
   - Number of cards
   - Maximum number of cards set (if any)
   - Sum of all cards estimated points

Users may drag and drop cards even when columns are currently collapsed. Cards will not be visible after dropping them to collapsed columns, however. Instead, they will remain hidden just as the cards previously contained within the same column until the user expands the collapsed column.

### Create a Board

You can create any number of boards in a workspace, but keep in mind that too many boards reduces the strength of a board to visualize all related work at once. A good practice is to create one board for each team.

To create a board:

1. Navigate to the **Boards** tool and click the **Add board** icon.
2. In the **Add Board** window, enter a name for the new board and click **Add**.

### Create Cards

Click any of the **plus icons** below the **activity** name (or swim lane title) to create a new card in the appropriate **status** column.

If you group cards by **Label**, **Assignee**, or **Activity**, click the **plus icon** in the desired group to add the card to that group. If you do not want to add the new card to any of the groups, click the **plus icon** in the last group at the bottom of the list titled **No activity**, **No assignee**, or **No label**.

You can also create a card based on a **card template**. Click the **template icon** to the left of the card title input field to bring up the list of available card templates, then select the template you want to base the new card on.
Users who do not have access to a Board can create cards using the Email to Board function.

Use the drag and drop functionality to place the most important cards at the top of a list in the first column so the team can address the most important cards first.

Filter Cards

Filter cards on a board based on a variety of card attributes. Some of the attributes you can filter by is card assignee, status, activities, labels, dependencies, due date, custom fields, and many more. Click the Filter icon in the toolbar to see the available filter options which appears on the list on the left side of the window.
Importing Cards

In order to quickly and easily create many cards, it is possible to upload a .csv (comma separated) file to a board. Importing cards is especially useful when, for example, recreating information that already exists in another resource, tool, or system.

To import cards to a board:
1. Navigate to the desired Board.

2. Click the **Options** menu icon in the upper right corner of the window.

3. Select the **Import cards** option.
4. In the new window that appears, click the **Choose files** button. Locate and select the desired .csv file (testing_CSV.csv in the above image).

   **Note:** Click **Download .csv template for importing cards to board** to download a pre-formatted template to help you import the cards. See **About the .csv File** for instructions on using the template.

5. Click **Next** to continue.

![Image of Import cards window]

6. The service now attempts to convert each record in the uploaded .csv file by creating a corresponding card on the board. After this process is completed, the conversion results are included in a new **Import cards** window that appears.

7. Review the **New cards created** and **Rejected records** results reported in the window.

8. If there are any **Rejected records**, click the **Download Rejected Records (csv)** link to open the failure report. The report includes a list of records that did not convert along with a potential reason as to why the failure occurred. Learn more about the Rejected records report in the **Import Errors** section below.

9. Click the **Start over** button to restart the conversion process for the failed records or to start the process for a different .csv file.

**About the .csv File**

We recommend that you download the (.csv template) file featured in **Step #4** in the above section, **Importing Cards**. This file contains all of the necessary headers to complete the conversion and is ideal for a spreadsheet application such as Microsoft Excel. Refer to the image below to see an example of a completed .csv template file.
For each record in the file, the following must be satisfied.

<table>
<thead>
<tr>
<th>Item #</th>
<th>Input Value</th>
<th>Value Action</th>
<th>Value Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Title</td>
<td>Required</td>
<td>Must contain at least 1 character and no more than 255 characters. <strong>Note</strong>: If the Title is omitted, the record will fail to convert to a card.</td>
</tr>
<tr>
<td>2</td>
<td>Description</td>
<td>Optional</td>
<td>If this field remains empty, the card will not include a description.</td>
</tr>
<tr>
<td>3</td>
<td>Due date</td>
<td>Optional</td>
<td>If a value is entered, it must use the following date format: YYYY-MM-DD.</td>
</tr>
<tr>
<td>4</td>
<td>Assignee</td>
<td>Optional</td>
<td>Use the email address of the workspace member with board access to assign the record/card. If this field remains empty, the corresponding card will be unassigned.</td>
</tr>
<tr>
<td>5</td>
<td>Label</td>
<td>Optional</td>
<td>Use a number for a range of 1 through 14 to assign a card label. These numbers correspond to the order of labels listed in the board settings. If this field remains empty, the corresponding card will be unlabeled.</td>
</tr>
<tr>
<td>6</td>
<td>Estimated time</td>
<td>Optional</td>
<td>Use a number representing the number of seconds that corresponds to the desired estimated time value. For example, if you want to report an estimated time value of one hour, input a value of 3600 seconds. If this field remains empty, the corresponding card will not include an Estimated time.</td>
</tr>
<tr>
<td>7</td>
<td>Blocked reason</td>
<td>Optional</td>
<td>Describe the reason for the card being marked as blocked if the corresponding card is blocked. If this field remains empty, the corresponding card will be unblocked.</td>
</tr>
<tr>
<td>8</td>
<td>Points</td>
<td>Optional</td>
<td>Use one of the following numbers to assign a point value: 0, 0.5, 1, 2, 3, 5, 8, 13, 20, 40, 100. If this field remains empty, the corresponding card will not have a points value assigned.</td>
</tr>
<tr>
<td>9</td>
<td>Column</td>
<td>Optional</td>
<td>Use a number between 1 and X, where X is the total number of columns included on the board you are importing to. For example, if you have a board with 5 status columns, you can specify a number between 1 and 5. If this field remains empty, the corresponding card will be placed in the first column on the board.</td>
</tr>
</tbody>
</table>

If the column headers are displayed in one single column, you may need to change the **delimiter** settings in your Microsoft Excel spreadsheet. The template file uses a semicolon (;) for the delimiter.

To change the Excel setting:
1. Navigate to and click the **Data** tab.
2. Select the **From Text/CSV** option.
3. Navigate to and select the desired template file and click **Import**.
4. In the dialog box that appears, select the **Semicolon** option in the dropdown box under **Delimiter** (if it is not already selected).
5. Click **Load**.

### Import Errors

When errors occur during the import, a **Download Rejected Records (csv)** .csv file and link (from Step #8 in the above section, **Importing Cards**) are created. This report is similar to the .csv template file, however, a new **Error** column has been inserted to the left of the **Title** column. The reason an error occurred is provided for each record in the **Error** column.

To resolve reported errors:

1. Downloading the **Rejected Records (csv)** file
2. Review and address each error included in the report
3. Delete the **Error** column
4. Attempt the import process again to convert the remaining corrected records into cards.

The image below provides an example of an **error.csv** file opened in Microsoft Excel:

1. The **Error** column (A) contains the details explaining why each record failed to import. **Note:** Once these errors have been corrected, delete the **Errors** column and upload the corrected .csv file again to import the remaining records.
2. The Rejected Record reported in this example is an **Invalid estimated time** error.
3. The value in the **Estimated time** column is "ö" which is not a valid value. Delete the value and enter a valid value (if one exists) as defined in the **About the .csv File** section above (refer to item #6).

To hide or delete a Board, visit **Hide and Delete Boards**.

- Was this article helpful?
- **Yes**