Creating, Viewing and Editing Boards

Last Modified on 31/07/2020 12:18 pm AEST

To create a Board:

1. Select the Configure icon in the top right corner.
2. Select **+Page Item** icon in the Left Navigation Area.
3. Select **New Board**
4. Select **Create**
5. Type the name for the board in the **Name** field.
6. Type the description for the board in the **Description** field.
7. In the **Report** field, select the Pencil icon. The Select Report dialog appears.
8. Select the report for the board and select **OK**.
9. Select the **Show quick add** checkbox if you want to create new record from the board, otherwise leave it without a tick.
10. Select **OK**. The Board is created with the default template of Name & description.

To view and edit a Board:

1. Select the Configure icon in the top right corner.
2. In the Left Navigation Area, hover on the Board you want to view or edit. The Configure icon appears.
3. Select the Configure icon for the Board. The menu appears.
4. Select **Board Properties**. The **Board Properties** dialog appears. Note: You can view or edit details as shown above.
5. Select **Options**. The options tabs appear with focus on **Advanced** tab.
6. In the **Application** field, select the Pencil icon. The Select Application dialog appears.
7. Select the application you want and select **OK**. Note: Creating a board from the Left Navigation Area associates the board to that application by default.
8. Select the **Format** tab. The Icon field appears.
9. Select the Pencil icon. The Select Icon dialog appears.
10. Select the icon you want and select **OK**. Note: Optional. A default icon appears.
11. Select the **Deploy** tab. The Deploy options appear. Note: By default, the board is deployed in desktop and not in tablet and mobile.
12. Select **OK** to save or **Cancel** to leave.

Boards are not supported on mobile at present.

If a report has 'State', 'Assigned', 'Priority' as the columns, then the 'State' is selected as the column of the board by default and 'Assigned' is selected as the colour by default (user can change).

If a report has 'State', 'Priority' as the columns, then the 'State' is selected as the column by default and 'Priority' is selected as the colour by default (user can change).

If a report has only 'State' as a column, then it is selected as the column for the board by default and the colour is left blank if no other choice/lookup column is available in report else will pick the next choice column for the colour. (User can select the colour manually.)

If a numeric value like id / auto number / number exists for a record, it appears on the top of the card.