Getting Started with Comala Boards

How can I use boards?

Once you have installed Comala Boards, you can:

- Create a new page with a board using a Comala Boards Blueprint
- Add a board to a page
- Create your own board
- Add page-cards and pages to your board
- View space labels in board layout

Comala Boards is **Data Center** and **Server** compatible

Getting started with boards

- What is a board?
- SWOT Analysis Board
- Adding a new board to a page
- Customizing the board
- Customizing the new board layout
- Setting Board Properties

Comala Boards is **Data Center** compatible.

What is a board?

A Comala Board is a fast and effective way for you to brainstorm and visualize your content and ideas.

A board can be embedded into

- an existing page by adding the boards macro or
- a new page when creating a page using a Comala Boards blueprint

There are a number of board templates that can be used to help you get started, such as the SWOT Analysis board.

SWOT Analysis

Strengths	Weaknesses

Opportunities	Threats
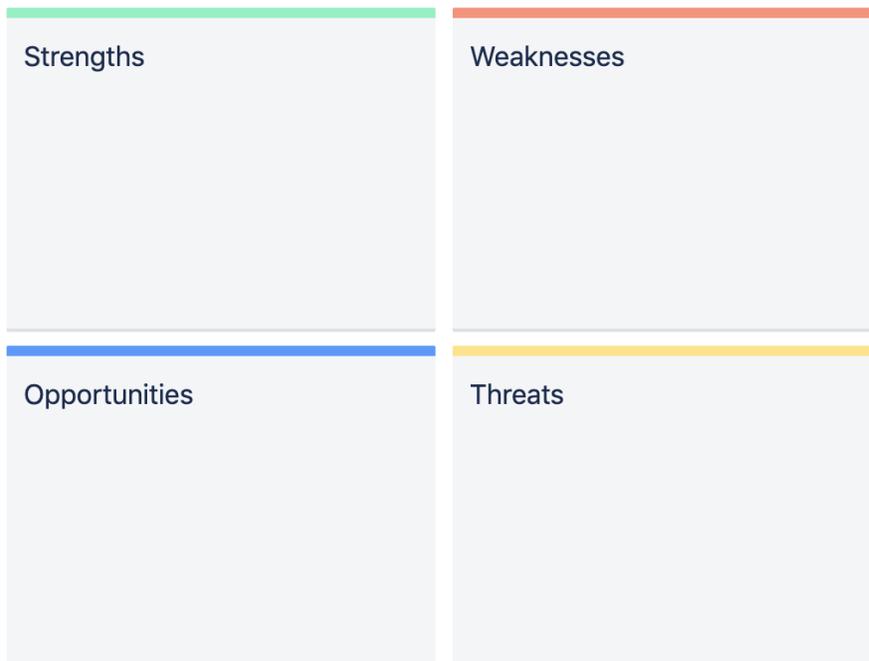
A board consists of columns into which you can add containers.

Each container has these attributes

- the container name

- the container description
- the labels defined for each container

All the board templates available when adding a board to a page can be viewed in the documentation Boards Exchange.

SWOT Analysis Board

The SWOT Analysis board has four containers - Strengths, Weaknesses, Opportunities and Threats.

Board Cards

Within each container, you can add one or more cards.

Once added to a board, a card can be moved to different containers on the board. This is done without the need to edit the Confluence page.

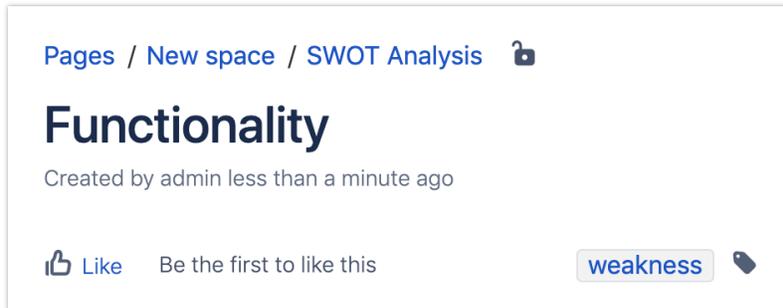Choosing a card will display any labels for the current container and any additional card content.

Board Pages

Each board can be configured to allow a card to be added as a simple card or as a page-card.
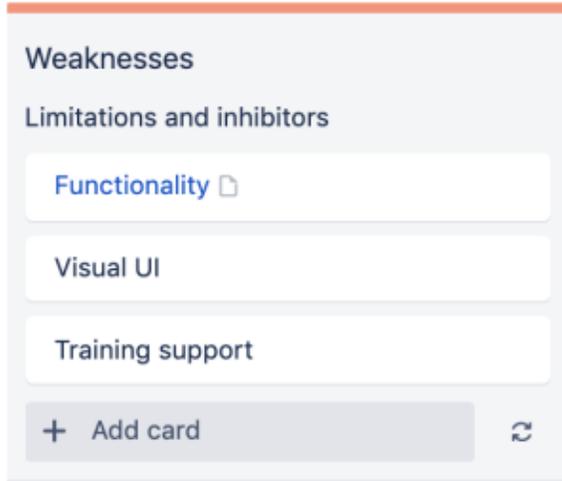
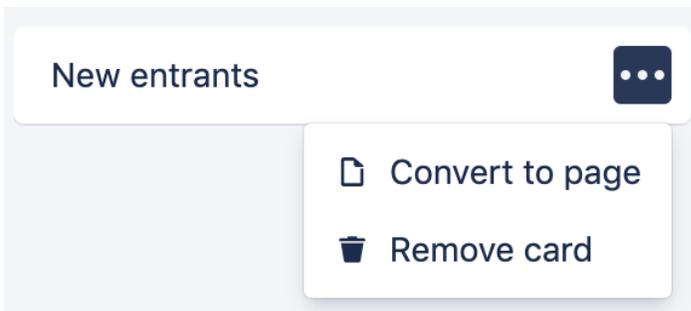Adding a card as a page-card will automatically create a linked Confluence page.

The linked page is displayed in the sidebar navigation.

- the page name is the same as the page-card on the board
- the Confluence page is created as a child of the page containing the source board
- any board content for the page-card such as the description is added to the new Confluence page
- the board container labels are added as Confluence page labels

If pages (page-cards) are allowed on the board, any existing card on the board can be converted to a page-card.

The converted card will be displayed on the board as a link to the newly created child page.
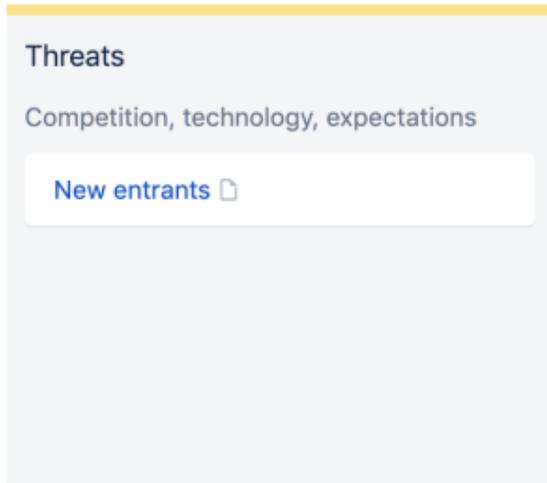
Moving the page-card location to a different container on the board will automatically change the labels to those of the new board container.

The labels will change for **BOTH** the **page-card** on the board and the **linked Confluence page**.

ℹ️ If you

- **remove** the **page-card** from the board this does not delete the child page
- **delete** the **Confluence linked page** this will remove the board page-card from the board

Adding a new board to a page

You can create your own customized Comala Board.

- choose **Edit** your page
- add the **board macro** to your page

- Choose **Create a new board** to add a new board

Insert Board

- Choose the number of rows and columns for your new board by 'scrolling to select' across the displayed grid.

Insert Board
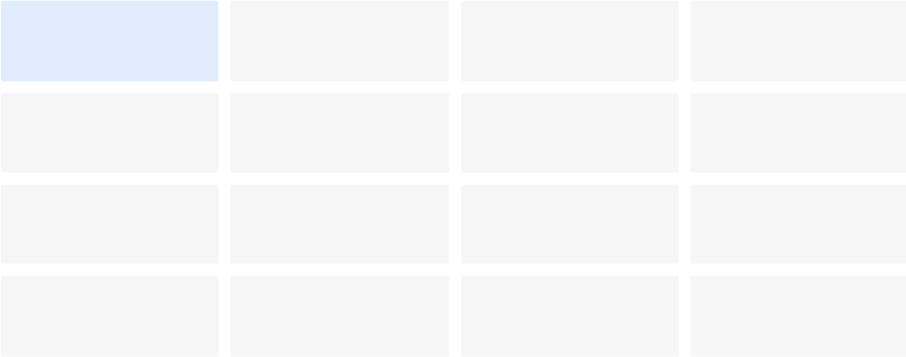
- Choose **Insert**.

This board macro, currently configured as a single cell board, can be saved to the Confluence page by choosing **Update** (or **Publish** if creating a new page).

The new board will be displayed on the published page. In this example it is a single container in a single row and single column.

New Board ⌄
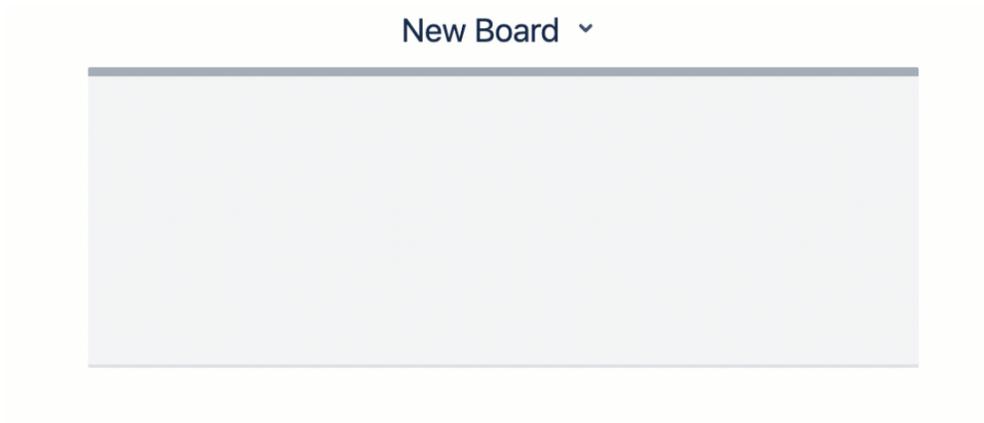
Users can add cards and card-pages to the board on the page. The design and layout of the board can be customized using the board editor.

Customizing the board

A board can be customized using the board editor. Choose the options from the board dropdown menu.

Design board ⌄

- ⠿ Design board
- ✿ Board properties
- ≡ Board filters
- {} Board markup
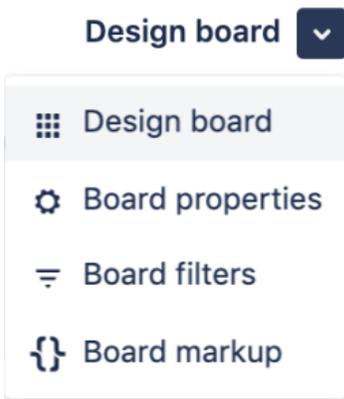
- **Design board** - to edit rows, columns, headers and footers and board containers and their colors
- **Board properties** - to edit board name, board description, match cell heights across rows and/or columns, choose to add cards or card-pages or both, hide or show container descriptions and notification of watchers
- **Board filters** - to display content based on labels, spaces and/or parent

Experienced users can also view and edit the board markup.

Customizing the new board layout

The initial board is a single row, single column with one unnamed container. The layout of the board can be customized using the tools in the **Design** option in the board editor.

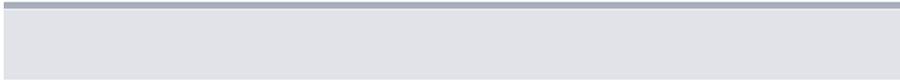- choose **Edit** the Confluence page

- choose **Edit** the board macro to open the board editor

Edit Board - New Board

Design board ⌄

Comala Boards — *You will update the board in the current page*   Close   **Apply**

A number of tool icons in the board editor allow you to customize the design of the board.

Add and remove board rows	Add and remove board columns	Add and delete a board container	Add a color scheme and/or an emoji to a container	Display and edit row and column header

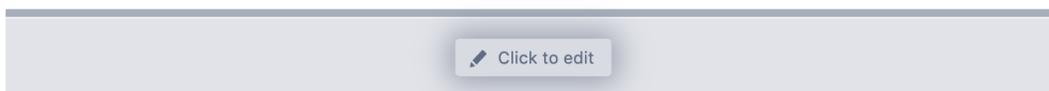## Customizing a board container

In the board editor **Design board** option.

Choose **Click to edit** in container to add or edit the container name and label(s).

Edit Board - New Board

Help

Design board ⌄

✏ Click to edit

Choose **More...** to add a container description.

Edit Board - New Board

Design board ▾

Container name

Labels

▾ More...

Description

Cancel   Apply

Comala Boards — *You will update the board in the current page*   Close   **Apply**

Adding a container name will automatically add the name as a label for the container.

If you later change a container name you will have to manually edit the label to reflect the new name.

You can also utilize the **board design** tools and the **board properties** option to

- add row and column headers, a container color scheme and an emoji for the board using the design tools
- add a name for your board in the board properties

Edit Board - New Board

Help

Design board ▾

Q3 2020

Dev Team

⚇⁺ Team Tasks

Development Project Team Tasks for Q3 2020

Team Tasks

Comala Boards — *You will update the board in the current page*   Close   **Apply**

Choose **Apply** to save any changes to the container.

Choose **Update** to add your updated board to the published page.

Team Tasks Board ⌄

Q3 2020

If there are multiple rows or columns, containers can be dragged and dropped to different cells in the board table. You can also have more than one container in a table cell.

Setting Board Properties

You can edit the properties of the board in the Edit Board dialogue.


In the board properties you can

- add or amend the name for the board
- add or edit the board description
- enable or disable checkboxes for card types that can be added to the board
- choose a default page template for the creation of linked board pages
- constrain the number of cards per container

The board properties toolbox icons can be used to

- set the board alignment on the published page as centre or left aligned
- match cell heights across the rows or across the board

- hide or display container descriptions on the published page
- hide or display multiline text in board cards
- manage notifications to page watchers for board change

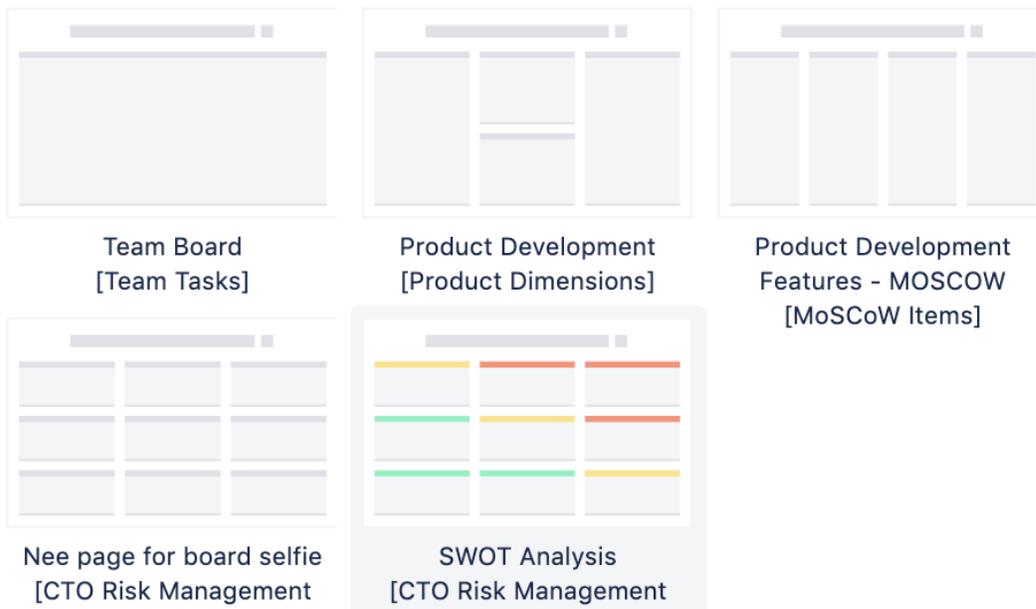You can create a range of individual boards with different containers.
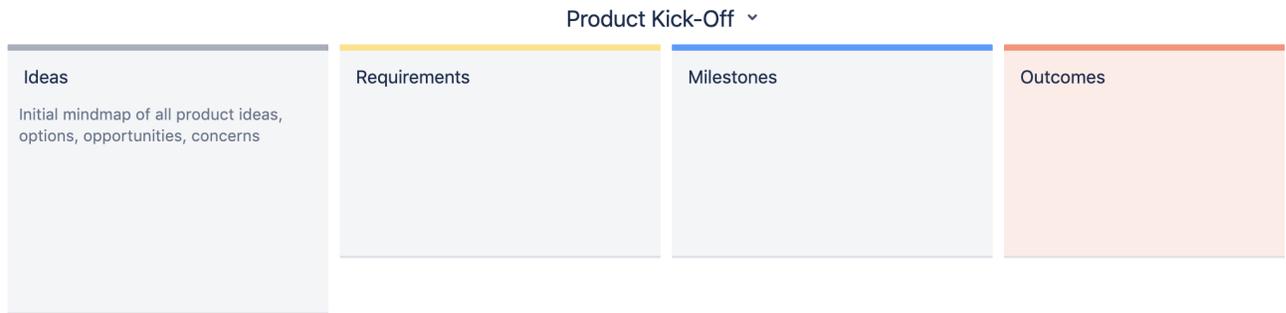
Comala Boards in a space

An overview of all the Comala Boards being used on pages in a space can be displayed using a shortcut menu in the Confluence side bar.
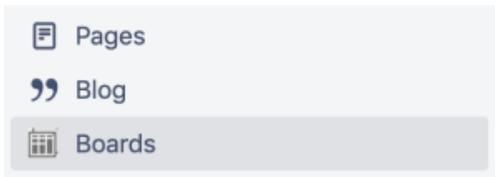
This report displays a visual list of pages in the current space with added boards.

Related Links

Comala Boards

- Feature Tour
- Getting Started with Comala Boards
- User Guide - Boards
- Working with Boards
- Working with the Board Editor
- Existing Boards
- Getting Started with Comala Boards Lists

Related links

- Boards Exchange

Help

- Contact Support