

Manage issue boards

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Issue boards at a glance

An issue board is a visual work area where issues appear as cards in columns. You use it to arrange board columns, place existing issues, and manage the board record from the Issues area.

If you need to...	Go to...
See the Issues destination and its Boards view	Issues overview
Open an existing board	Find and open a board
Start a board from a standard layout	Create or duplicate a board
Change the board name, description, color, or columns	Configure the board and its columns
Add, filter, or move issues	Add, filter, and move issues on a board
Work on one issue after finding it on a board	Work with an issue
Review issue status and recovery guidance	Issue states and recovery
Move between application destinations	Navigation basics

When you create a board, choose one of three templates: **Default**, **Simple**, or **Empty**. The board record then gives you access to its columns and issue cards.

Before you start

You need a selected project before the Boards view can load its boards. Sign in to the application.

If no project is selected, the page shows `No project selected` and `Pick a project from the switcher to see its boards.`

Find and open a board

A board card is the list entry for one saved board. Open it when you want to work with that board's columns and issue cards.

Prerequisites

- Select the project whose issue boards you want to use.
- Sign in to the application.

Steps

1. In the Issues area, open the Boards view.
2. Optional: Select **Refresh** to request the current board list again.
3. Choose the next action.

If you want to...	Select...
start when the list shows No boards yet	Create board ; the create-board dialog opens
create a board from a populated list	New board ; the create-board dialog opens
open a board that is already listed	the board card; the board record opens

4. If the board record is open, optionally select **All Boards** to return to the board list.

Result: The create-board dialog is open after you select **Create board** or **New board**, or the selected board record is open after you select its board card.

Create or duplicate a board

Creating a board starts a new board record. Duplicating copies an existing board's columns and cards into a new board, so use duplication when you want to preserve an existing board arrangement.

Create a board

Prerequisites

Starting state	Entry action
The create dialog is already open after selecting Create board or New board	Begin with step 1.

Starting state	Entry action
The Boards view is open	Select New board , then begin with step 1.

Steps

1. In **Name**, enter the board name.
2. In **Description**, enter an optional description.
3. In **Color**, select a color preset.
4. In **Start with template**, select one of the following options.

If you want to...	Select...
Use the four-column starting layout	Default
Use the three-column starting layout	Simple
Add your own columns from the beginning	Empty

5. If you selected **Default** or **Simple**, select **Add all current open issues to this board** when the board should begin with the project's current open issues.
6. Select **Create board**.

The dialog uses **Name** as a required field and limits it to 80 characters. **Description** is optional and limited to 500 characters. **Add all current open issues to this board** is available for **Default** and **Simple**, not **Empty**.

After a successful creation, the application displays **Board created** and opens the new board record.

Result: The new board record opens with the selected template and optional open issues.

Duplicate a board

Prerequisites

- Open the board list.
- Know which saved board you want to copy.

Steps

1. On the board card, open **Board options**.

2. Select **Duplicate**.
3. In **Name**, review the pre-filled copy name and edit it if needed.
4. In **Description**, enter an optional description.
5. In **Color**, select a color preset.
6. Choose the next action.

If you want to...	Select...
create the duplicate	Duplicate board
close the dialog without duplicating	Cancel

Duplicate mode does not show **Start with template** or **Add all current open issues to this board**. A successful duplication displays `Board duplicated` and opens the new board record.

If creation fails, the dialog can display `Could not create the board. Try again.`

Result: A new board copy opens, or the dialog closes without changing the board list.

Configure the board and its columns

Board settings control the board record itself. Columns control how issues are grouped and which issue status a column represents.

Update board details

Prerequisites

- Open the board record or the board card's options menu.
- Have a new board name ready when you change the name; the field is required for saving.

Steps

1. On the board card, select **Board options**.
2. Select **Edit board**.
3. In **General**, edit **Name**, **Description**, or **Color**.
4. Choose the next action.

If you want to...	Select...
save the board details	Save changes
manage the board columns	Columns

The **Name** field is required and accepts up to 80 characters. **Description** is optional and accepts up to 500 characters. A successful save displays **Board updated**.

Result: The board settings close after the details are updated, or the **Columns** tab opens for column management.

Add or edit a column

Prerequisites

- Open **Board settings** on a board record.
- Select **Columns**.

Steps

1. Choose how to open the editor.

If you want to...	Open the editor with...
create a new column	Add column
edit an existing column	the existing column, which opens Edit column

2. In **Name**, enter the column name.
3. In **Maps to status**, select one of **Open**, **In Progress**, **Resolved**, **Closed**, or **None**.
4. In **Color**, select a color preset.
5. In **WIP limit**, enter a limit, or leave it blank for no limit.
6. Choose the final action.

If you are...	Select...
creating a column	Add column
editing a column	Save

The column name is required and limited to 60 characters. A WIP limit is optional; an entered value has a minimum of 1. **None** is a purely organizational column mapping

that does not change issue status. A successful action displays `Column added` or `Column updated` .

Result: The column list shows the new or updated column.

Reorder or remove columns

Prerequisites

- Open **Board settings** and select **Columns**.

Steps

1. Drag a column to its new position.
2. Select a column to open its editor.
3. Select **Delete column**.
4. When other columns exist, choose the destination column for its cards.
5. Select **Delete**.
6. Select **Done** when you finish column management.

When the column has other columns available, the confirmation asks where its cards go.

When it is the last column, the confirmation says `This is the last column on the board – delete the board instead if you want to remove everything.` and **Delete** is disabled.

A successful removal displays `Column deleted` . If saving or deleting fails, the editor can display `Could not save the column.` OR `Could not delete the column.`

Result: The board shows the saved column order, or the column is removed and its cards are handled according to the selected destination.

Add, filter, and move issues on a board

Issues appear as cards on the board. Use **Add Issues** to place existing issues on the board, **Filter** to narrow the cards shown, and drag cards between columns to change their board position.

Add existing issues

Prerequisites

- Open a board record with at least one destination column.
- Know which existing issues you want to place on the board.

Steps

1. Select **Add Issues**.
2. In **Search issues...**, enter search text when you want to narrow the list.
3. In the status filter, select **Any status**, **Open**, **In Progress**, **Resolved**, or **Closed**.
4. In the priority filter, select **Any priority**, **Critical**, **High**, **Medium**, or **Low**.
5. Select the checkbox beside each issue to add, or select **Select all visible**.
6. In **Add to column**, select the destination column.
7. Select **Add issue** or **Add issues**, according to the number of selected issues.

The **Add to column** choices come from the board's saved column names. The first column

in board order is selected when the dialog opens. If no issues match, the dialog displays

No issues to add .

After a successful addition, the application displays Added <count> issue(s) to the board .

If the addition fails, it can display Couldn't add issues .

Result: The selected issues appear in the chosen board column.

Filter the board cards

Prerequisites

- Open a board record with cards available to filter.

Steps

1. Select **Filter**.
2. In **Filter cards**, choose values under **Priority**.
3. When the board contains matching values, choose values under **Category**, **Assignee**, or **Audience**.
4. Under **Reporter email**, select **Any**, **Has email**, or **No email**.
5. Select **Reset** to remove the choices in the filter panel, or select **Clear all** from the active-filter strip.

The **Category**, **Assignee**, and **Audience** sections appear when the board has matching values. **Priority** and **Reporter email** are always available in the filter panel. Active choices appear in the filter strip and can be removed individually.

Result: The board shows only the cards that match the selected filters.

Move a card between columns

Prerequisites

- Open a board record with an issue card and at least one destination column.

Steps

1. Drag the issue card to its destination column.
2. When the destination is at its WIP limit, review the confirmation prompt
<column name> is at its WIP limit (<count>). Add anyway? .
3. Confirm the move when you want to add the card despite the limit.

If the move fails, the application can display Couldn't move the card – please try again.

Result: The card appears in its destination column, or it remains in its original column when the WIP-limit confirmation is declined.

When a board action goes wrong

Use this table to match the exact message to the action you were taking.

What you see	What it means	What to do
No project selected	The board screen has no selected project.	Pick a project from the project switcher, then reopen Boards.
No boards yet	The selected project has no boards in the list.	Select Create board .
Nothing matches	No board has an issue in the selected status filter.	Select Clear filter .
No issues to add	No issue matches the current add-issue search and filters.	Change Search issues... , the status filter, or the priority filter.
Delete board?	The board-delete confirmation is open.	Select Cancel to keep the board, or select Delete board to remove the board view.
The issues themselves stay on your project – only the board view is deleted.	Deleting a board removes its board view, not its issues.	Delete the board only when you want to remove that view.
You can undo this for the next 30 days.	The deleted board can be restored during that	Select Undo in the deletion notification when you want to

What you see	What it means	What to do
	period.	restore it.
Could not create the board. Try again.	Board creation did not complete.	Review the board details and select Create board again.
Could not save	Board settings could not be saved.	Review the board details and select Save changes again.
Could not save the column.	Column creation or editing could not be saved.	Review the column details and select Save or Add column again.
Could not delete the column.	Column deletion did not complete.	Review the destination-column choice and select Delete again.
Couldn't add issues	The selected issues were not added.	Review the destination in Add to column and try again.
Couldn't move the card – please try again.	The card move did not complete.	Return the card to its intended column and try the move again.
Couldn't restore – try the boards index	The restore action did not complete.	Open the Boards list and try the restore action there.

Continue with the board's issues

After you finish board maintenance, continue with the individual issue represented by a card or review the issue's status guidance. Creating a board opens its new board record, and deleting a board leaves the issues on the project even though the board view is gone.

Continue with...	Read...
An individual issue record	Work with an issue
Issue statuses and recovery	Issue states and recovery
The Issues destination and board entry point	Issues overview