



4.1 General setup



Part of the **Agile Project Management** manual — see also [1. Introduction](#), [2. What's New](#), [3. Scope](#), [4.2 Labels](#), [4.3 Project task templates and checklists](#), [4.4 Notifications](#), [5.1 The board](#), [5.2 Working with cards](#), [5.3 Project task cards](#), [5.4 Ticket cards](#), [5.5 Labels](#), [6. Troubleshooting](#).

4.1.1 Installation

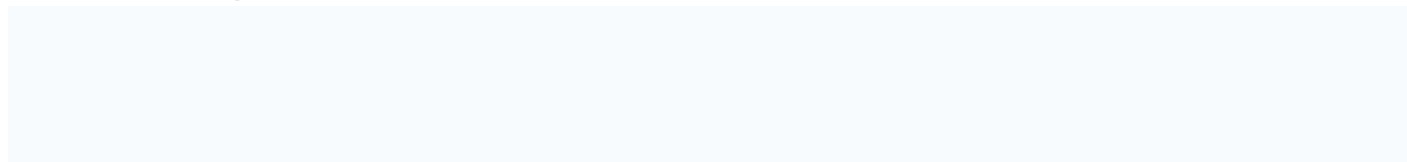
Copy the plugin folder into GLPI's `plugins/` directory, then install and activate it from **Setup** → **Plugins**. Installing creates the configuration with sensible defaults, grants the Kanban rights (every one except **Permanently delete a card**), the label rights and the checklist template rights to the profiles that can already update projects, and registers the notification events described below.

4.1.2 Configuration

Open **Setup** → **General** and choose the **Agile Project Management** tab. This is one global configuration for the whole GLPI instance: it does not change per entity or per project. The screen has three blocks. For each option below: what it does, where you see the effect, and an example of when it helps.

General options

- **Task background** — the background colour of every *task* card.



- *Where:* the card front on a project's **Kanban** tab and on the global **Kanban** board (main menu), and the outline of the placeholder shown while a task card is being dragged.
- *Example:* set it to a pale green so task cards stand apart from tickets on a busy board.
- **Ticket background** — the background colour of every *ticket* card.
 - *Where:* the same two boards.
 - *Example:* a pale orange makes customer tickets stand out from internal task work at a glance.
- **Request sources by default** — the request source written on the followups the board adds to a ticket on your behalf. Empty means GLPI's own default request source.
 - *Where:* a comment posted on a ticket card from the card window, and the followup created by the **Set the status to pending** dialog when a ticket card is moved to the Pending column. The value shows in that followup's details in the ticket timeline.
 - *Example:* choose a request source called *Kanban*, so a supervisor reading a ticket can tell which followups came from the board rather than from a phone call or an e-mail.
- **Default ticket category filter** — the category already selected in the **Category** filter when the **Link tickets** dialog opens.
 - *Where:* board toolbar → **Link tickets** button → the dialog's **Category** filter. The user can change or clear it every time.
 - *Example:* a hardware team that almost always links *Hardware > Printers* tickets set it to that category, so the list opens already narrowed to the tickets they want.
- **Closed cards shown** — how many of the most recently closed cards the Closed column keeps visible, from 0 to 50; default 3. Older closed cards are not loaded, only counted in the column header, which keeps a board with a long history fast. At 0 the column shows only its count.
 - *Where:* the Closed column of every board, whose note reads "Showing the last 3" while more cards are closed than shown. On the global board the number applies to the whole column, not to each project.
 - *Example:* a team that often reopens a task it closed that morning raises it to 10, so the task is still on the board to drag back.
- **Project-eligible tickets by default** — whether the **Project-eligible tickets** switch in the **Link tickets** dialog starts switched on. That switch lists only open tickets (neither

solved nor closed), not yet linked to this project, that concern one of the items (computers, printers, software...) attached to the project.

- *Where:* board toolbar → **Link tickets** → **Project-eligible tickets** switch. The user can switch it off or on every time.
- *Example:* in an instance with thousands of tickets, a project that replaces the printers of one office lists that office's printers as its items; with this on, the dialog opens showing only the open tickets about those printers.

State labels

Teams often put a sort prefix in state names so GLPI lists them in a useful order, such as `A. Open`, `B. In progress` for project states and `1. To do`, `2. Doing` for task states. This block keeps those prefixes off the board.

- **Strip sort prefix from state labels** — the master switch for the two patterns below. Off, both patterns are ignored and states appear exactly as named.
 - *Where:* board column titles and the global board's project picker (see below).
 - *Example:* switch it off while testing new state names, to see the raw names on the board.
- **Task state prefix regex** — the pattern removed from the start of a state name when it is shown as a column title. The default `/^\d+[-.]\s*/` removes a number followed by a dot or a dash and any spaces. If removing it would leave nothing, the full name is kept.
 - *Where:* the column titles on every board.
 - *Example:* the state `1. To do` appears as the column **To do**, while GLPI's own state lists keep the order 1, 2, 3.
- **Project state prefix regex** — the pattern that marks a state as a *project* state rather than a task state. The default `/^[A-Za-z][-.]\s*/` matches one letter followed by a dot or a dash, as in `A. Open`.
 - *Where:* global **Kanban** board → **Filter projects** → the **Project state** drop-down, which only offers the states matching this pattern.
 - *Example:* when project and task states share GLPI's single state list, this keeps task states such as `2. Doing` out of the project picker, so filtering projects by state only shows states a project can actually be in.

Both patterns are full PHP regular expressions, including the `/.../` delimiters. An invalid pattern is refused on save with an error message, and the previous value is kept.

Kanban Ticket

- **New, Processing (assigned), Processing (planned), Pending, Solved, Closed** — each picks the project state behind that column. A ticket card sits in the column of its ticket's status, and moves on its own when that status changes in the ticket. Task cards can be dragged to any column; ticket cards only to **Pending**. Only states chosen here become columns, always in this order. A card whose state is not mapped to any column is not lost: it goes to an extra **No status** column at the far left, which only appears while at least one card needs it. The **No status** column has no add buttons and refuses dropped cards.
 - *Where:* the columns of every Kanban Ticket board, and which column each ticket card appears in.
 - *Example:* map **Pending** to your *Waiting for customer* state: dragging a ticket card there puts the ticket on hold and opens the **Set the status to pending** dialog for the followup and the pending reason.
- **Hide native project tasks tabs on Kanban Tickets** — on by default. Removes two of GLPI's own tabs from a Kanban Ticket project: GLPI's native **Kanban** tab and the **Project tasks** tab, so the plugin's board is the only place tasks are managed.
 - *Where:* the tab list of a Kanban Ticket project (**Tools** → **Projects** → a project).
 - *Example:* leave it on so the team is not tempted to edit tasks in two places; switch it off if someone still needs GLPI's task list, for example to export it.
- **Calculate task progress from tickets and checklist** — sets a task's percent done from its linked tickets and its checklist: the share of them that is done, where a ticket counts once it is solved or closed and a checklist item once it is ticked. It is updated whenever a ticket or an item changes, even by a user who cannot edit the task. A task with neither tickets nor a checklist keeps the percent typed by hand. This is the default for every project; each project can keep it, or switch it on or off for itself, on its **Agile Project Management** tab.
 - *Where:* the progress bar of task cards, and the task's **Percent done**.
 - *Example:* switch it on so a task with three tickets shows 67% as soon as two of them are solved, without anyone updating the task.

Kanban labels

Labels are managed under **Setup → Dropdowns → Kanban labels** (listed under the plugin's name). Each label has:

- **Name** — the text on the chip. *Example:* `Urgent`, `Waiting for supplier`.
- **Color** — the chip background. The chip text switches between black and white automatically, whichever reads better on the colour chosen. Default grey. *Example:* red for `Urgent`, so it catches the eye among other labels.
- **Entity** and **Child entities** — where the label can be used. A label belongs to an entity, not to one project, so it is shared by every project of that entity, and of its sub-entities when **Child entities** is on. *Example:* create `Urgent` once in the root entity with **Child entities** on, and every team can use it and filter the global board by it.
- **Comments** — notes for administrators; not shown on the board.

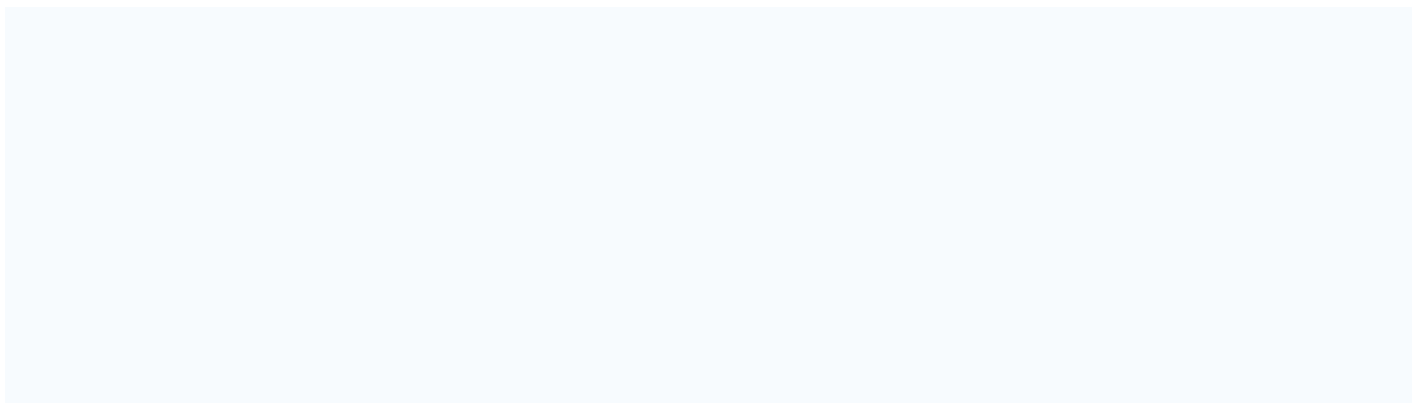
Where labels appear: as chips on the card front and in the card window (**Assign labels**), and in the global board's **Filter by label** dialog. Purging a label removes it from every card that carried it.

4.1.3 The configuration screen

The configuration is one screen with three blocks. The screenshots below show each block with its default values; what every option does is explained in [4.1.2 Configuration](#).

4.1.3.1 General options

Open **Setup → General** and choose the **Agile Project Management** tab. The first block sets the two card colours, the request source used for followups the board writes, and the two defaults of the **Link tickets** dialog. Here the dialog opens already filtered on the *Bug report* category.



Task background	#cce5ff	Ticket background	#f4cccc
Request sources by default	Helpdesk ▼ ⓘ +	Default ticket category filter	Bug report ▼ ⓘ +
Closed cards shown	3	Project-eligible tickets by default	☐

4.1.3.2 State labels

The second block controls how sort prefixes are removed from state names on the board. With the defaults shown, the task state becomes the column **To do**, and states starting with a letter, such as , are the ones offered as project states in the global board's **Filter projects** window.

Strip sort prefix from state labels	☒	Project state prefix regex	/^[A-Za-z][-.]\s*/
Task state prefix regex	/^\d+[-.]\s*/		

4.1.3.3 Kanban Ticket

The third block decides the board's columns. Each of the six ticket statuses (**New**, **Processing (assigned)**, **Processing (planned)**, **Pending**, **Solved**, **Closed**) picks the project state that becomes its column, always in that order; a state not picked here is not a column, and its cards go to **No status**. A ticket card sits in the column of its ticket's status. The block also holds **Hide native project tasks tabs on Kanban Tickets** and **Calculate task progress from tickets and checklist**; every option is described in [4.1.2 Configuration](#). In this example *Pending* maps to , so dragging a ticket card into that column puts the ticket on hold. Click **Save** at the bottom of the screen to apply any change.

New	1. To do ▼ i +	Processing (assigned)	2. In progress ▼ i +
Processing (planned)	3. Scheduled ▼ i +	Pending	4. Waiting for customer ▼ i +
Solved	5. Solved ▼ i +	Closed	6. Closed ▼ i +

Hide native project tasks
tabs on Kanban Tickets ☒

Calculate task progress
from tickets and
checklist ☐

4.1.4 Permissions

Rights are set per profile under **Administration** → **Profiles** → a profile → **Agile Project Management** tab. The tab has four rows. Every box on it is listed below, exactly as labelled. None of the boxes implies another: ticking one does not tick any other.

Kanban row — what a user can do on a board (a project's **Kanban** tab and the global **Kanban** board):

- **Add a card** — create a new card (always a project task) from a column's menu or the **Add a card** button.
- **Move a card** — drag a task card to another column, which changes the task's state, or drag a ticket card to **Pending** to put the ticket on hold (the only move a ticket card allows).
- **Edit title** — change a card's title in the card window.
- **Edit description** — change a card's description in the card window.
- **Delete a card** — on a task card, deletes the task: it stays on the board greyed out and can be brought back. On a ticket card that is linked to a task, the **Unlink** button removes the ticket from that task only; the ticket stays linked to the project and its card stays on the board. Unlinking also needs **Link tickets to a task** and the right to update the project.
- **Restore a card** — bring a deleted task card back to normal.
- **Permanently delete a card** — remove a deleted task card for good. Not granted on install; give it deliberately, because it cannot be undone.
- **Assign user to a card** — add or remove the users assigned to a card.

- **Assign a label to a card** — put labels on a card or take them off (**Assign labels** in the card window). Creating and editing the labels themselves is the **Kanban labels** row below.
- **Edit a card checklist** — add, edit, reorder, tick or delete the checklist items of a task card. Without it the checklist is read-only.
- **Add comment to a card** — post a comment from the card window. For a ticket card, the comment becomes a followup on the ticket.
- **Edit real dates** — correct a task's **Real start date** and **Real end date** in the card window. Without it the board still fills them in as the task moves, but the two fields are read-only.
- **Edit planned dates** — change a task's **Planned start date** and **Planned end date** in the card window. Everyone who can see the card still sees them.
- **Link tickets to a task** — add tickets to a task, or remove them, from the **Tickets** section of the task's card window. Removing one only unlinks it from the task; the ticket stays linked to the project.

Kanban labels row — maintaining the label list under **Setup → Dropdowns → Kanban labels**:

- **Read** — see the label list and each label's details.
- **Update** — rename a label or change its colour, entity or comments.
- **Create** — add new labels.
- **Purge** — delete a label for good; it disappears from every card that carried it.

Checklist templates row — maintaining the checklist items of project task templates (**Setup → Dropdowns → Project task templates → a template → Checklist** tab):

- **Read** — see a template's checklist items.
- **Update** — edit an item's text.
- **Create** — add items.
- **Purge** — delete items.

Project type row:

- **Change type** — shows the plugin's tab on a project, where its type is changed, and the **Change project type** action of the Projects list. Without it, a project keeps the type chosen when it was created. The user also needs the right to update that project.

On a fresh install, every box above is ticked except **Permanently delete a card**, and only on profiles that can already update projects. When the plugin is updated, rights added in the new version (such as **Edit real dates**, **Edit planned dates** and **Link tickets to a task**) are granted once to those same profiles, so nobody loses access to a new feature; unticking one afterwards is kept.

GLPI core rights still apply on top: seeing a ticket card's private comments needs GLPI's own **See private ones** right for followups (on the profile's **Assistance** tab), which is not part of this tab, and a user only sees the projects and tickets GLPI already lets them see.

4.1.5 The profile rights tab

The plugin's rights sit on their own tab of every GLPI profile. What each box allows is listed in [4.1.4 Permissions](#).

4.1.5.1 Open the Agile Project Management tab on a profile

Go to **Administration** → **Profiles**, open a profile, then its **Agile Project Management** tab. Tick or untick the boxes and click **Save**. The screenshot shows the *Super-Admin* profile of the demo instance.

PROJECTMANAGEMENT

	ADD A CARD	READ	UPDATE	CREATE	PURGE	MOVE A CARD	EDIT TITLE	EDIT DESCRIPTION	DELETE A CARD	ASSIGN USER TO A CARD	ADD COMMENT TO A CARD	RESTORE A CARD	ASSIGN A LABEL TO A CARD	EDIT A CARD CHECKLIST	PERMANENTLY DELETE A CARD	EDIT REAL DATES	LINK TICKETS TO A TASK	EDIT PLANNED DATES	SELECT/UNSELECT ALL
Kanban	☒					☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
Kanban labels	☒	☒	☒	☒	☒														☒
Checklist templates	☒	☒	☒	☒	☒														☒
Select/unselect all	☒	☒	☒	☒	☒														☐

GENERAL

CHANGE TYPE

Project type☒

Save

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