

Lesson 04 Demo 01

Creating Dashboards and Setting Up Jira Project

Objective: To demonstrate the process of creating a Jira account, creating dashboards, and setting up customized projects for efficient project management

Tool required: Jira

Prerequisite: None

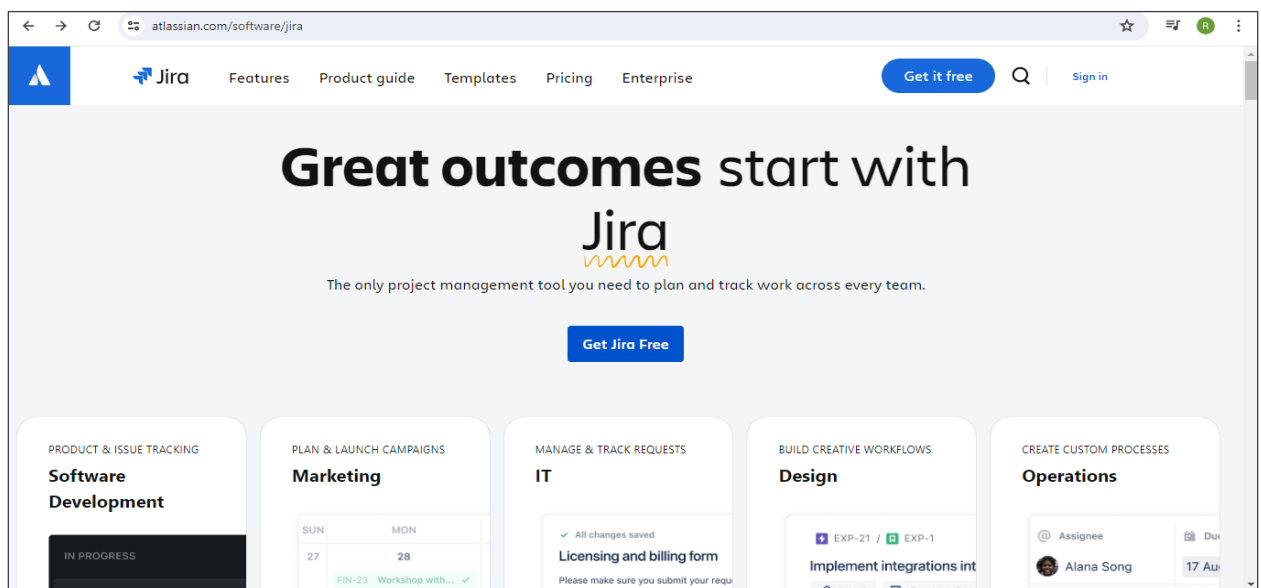
Steps to be followed:

1. Sign up for a free-tier Jira account
2. Creating a Jira dashboard
3. Creating a custom project

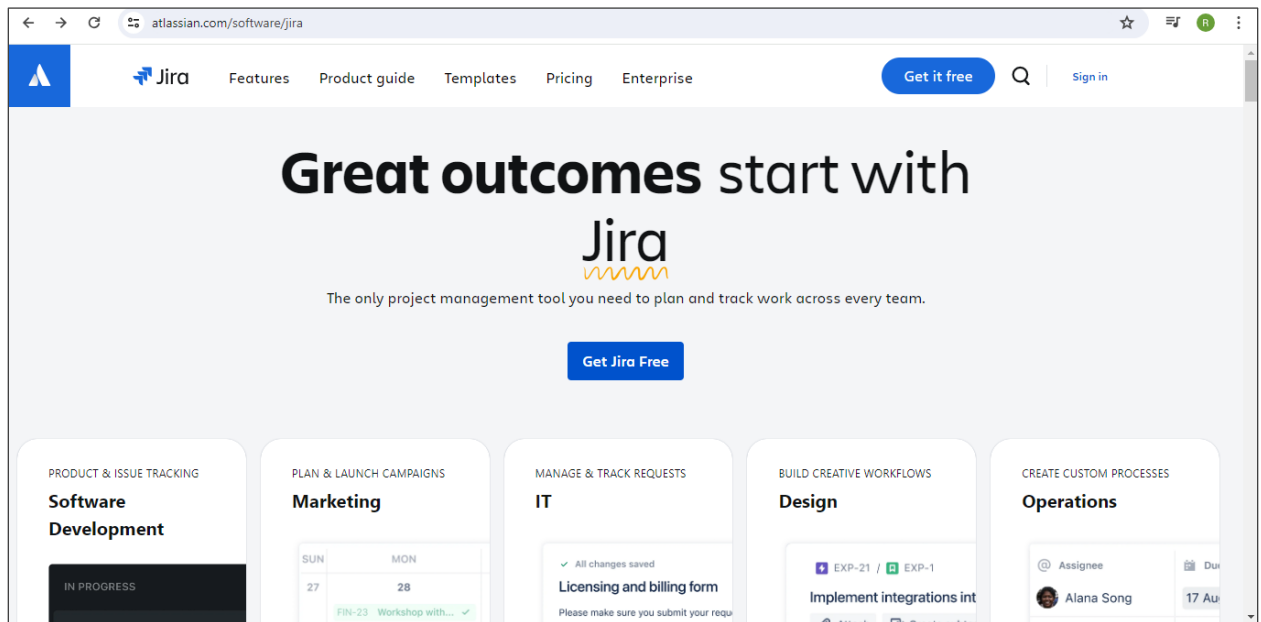
Step 1: Sign up for a free-tier Jira account

1.1 Navigate to the Jira website using the below link:

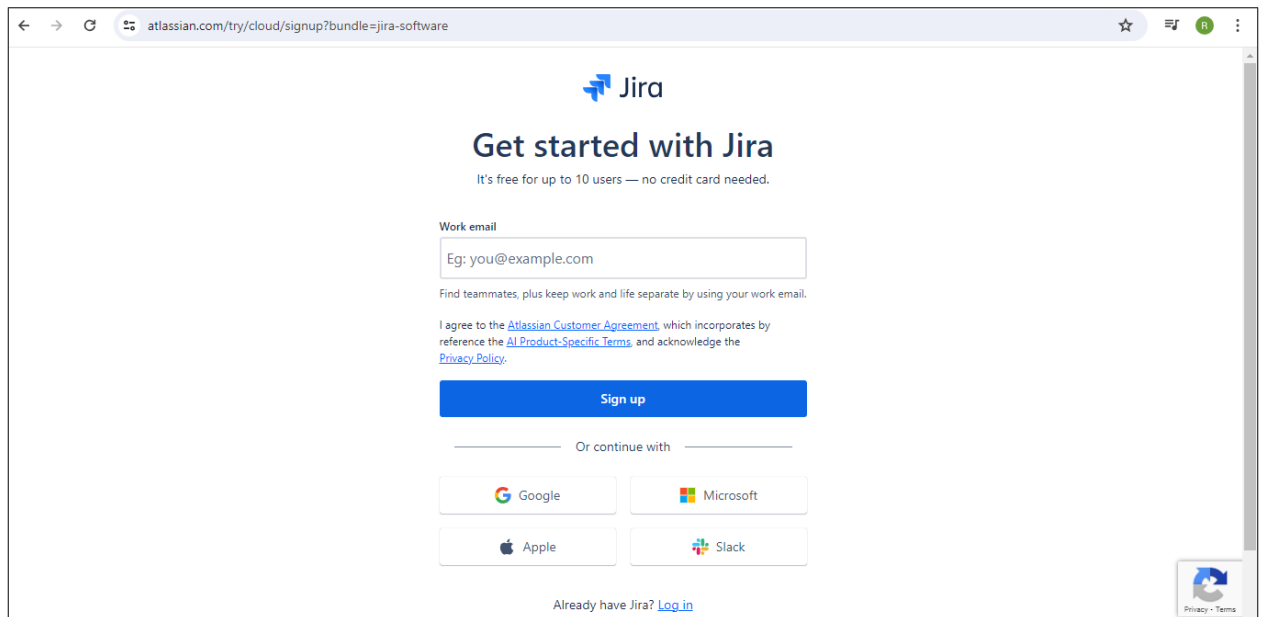
<https://www.atlassian.com/software/jira>



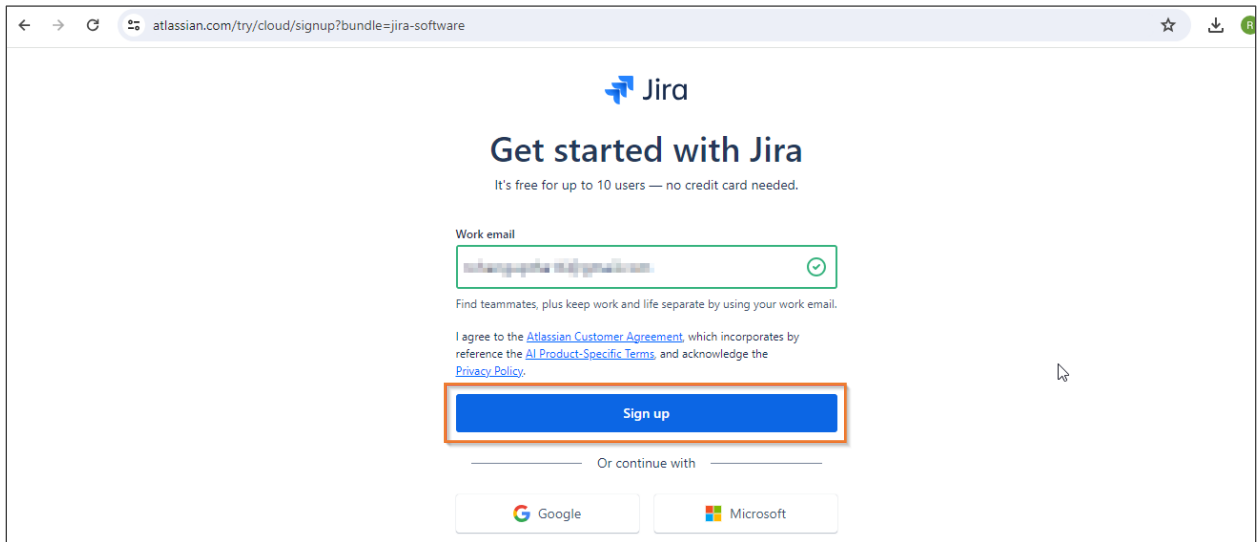
1.2 Click **Get Jira Free**



The following interface appears:



1.3 Enter your email address in the **Work email** field and then click **Sign up**



← → ↻ atlassian.com/try/cloud/signup?bundle=jira-software ☆ ⬇ R

Jira

Get started with Jira

It's free for up to 10 users — no credit card needed.

Work email

Find teammates, plus keep work and life separate by using your work email.

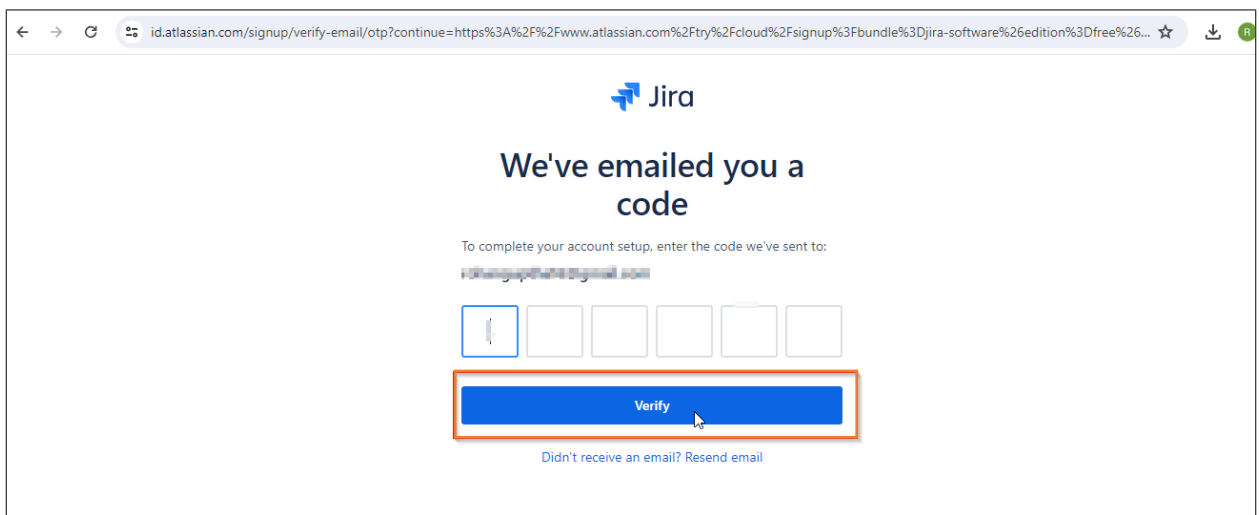
I agree to the [Atlassian Customer Agreement](#), which incorporates by reference the [At Product-Specific Terms](#), and acknowledge the [Privacy Policy](#).

Sign up

Or continue with

Google Microsoft

1.4 Enter the verification code received on your email, and then click **Verify**



← → ↻ id.atlassian.com/signup/verify-email/otp?continue=https%3A%2F%2Fwww.atlassian.com%2Ftry%2Fcloud%2Fsignup%3Fbundle%3Djira-software%26edition%3Dfree%26... ☆ ⬇ R

Jira

We've emailed you a code

To complete your account setup, enter the code we've sent to:

Verify

Didn't receive an email? [Resend email](#)

1.5 Fill in the values in the **Full name** and **Password** fields, and then click **Continue**

Jira

Email address verified ✓

Add your account details

Email address
[redacted]

Full name *
[redacted]

Password *
[redacted]

Good

By signing up, I accept the Atlassian Cloud Terms of Service and acknowledge the Privacy Policy.

Continue

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

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1.6 In the **Your site** field, enter your team's name or company name and then click **Continue**

Jira

Let's name your site

Your site name is part of your Jira URL. Most people use their team or company name.

Your site
[redacted].atlassian.net ✓

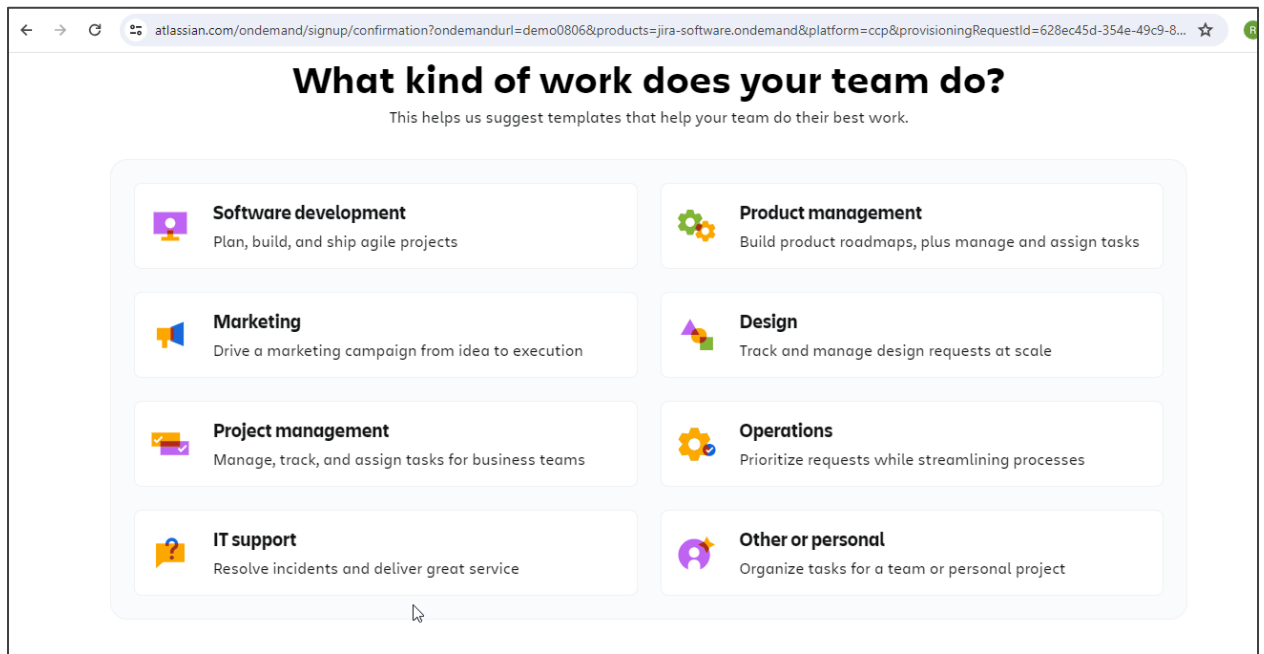
This site name is just a suggestion. Feel free to change to something your team will recognize.

Continue

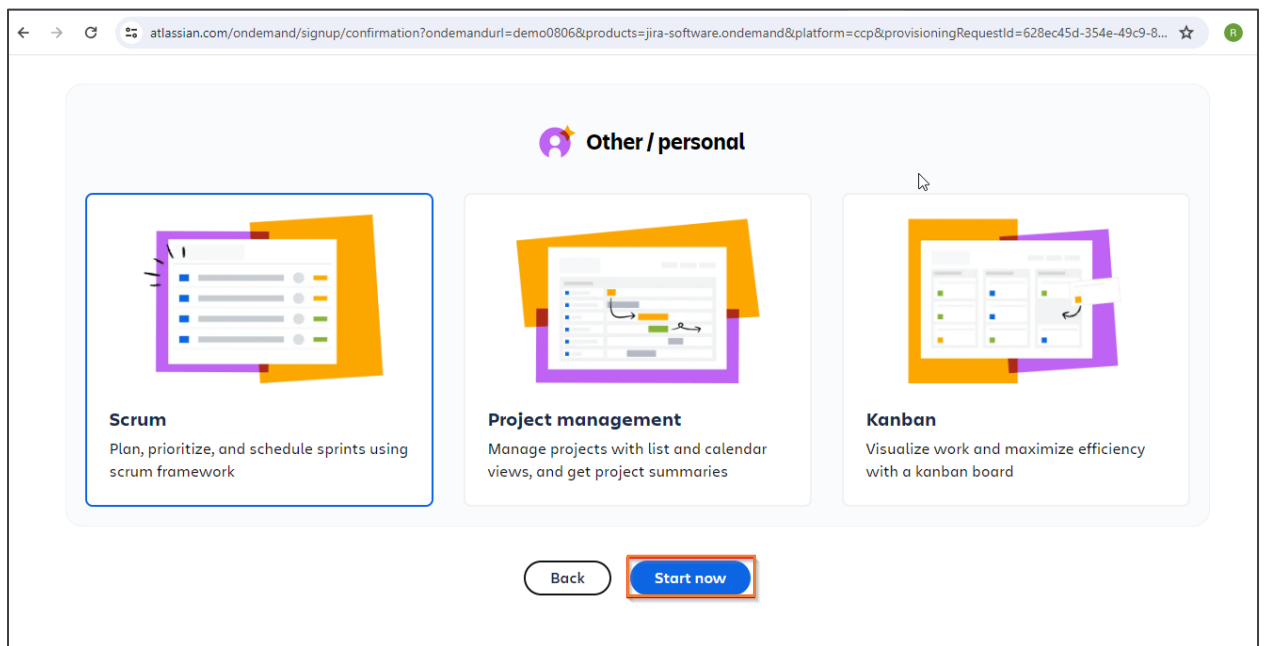
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Privacy - Terms

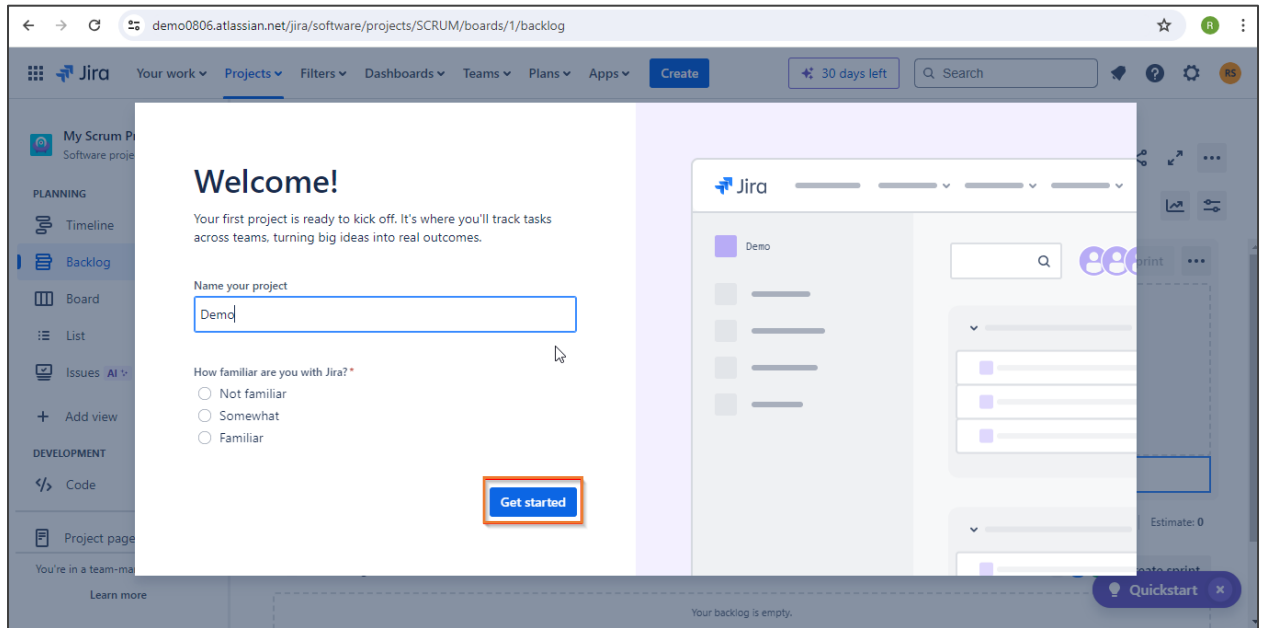
1.7 Select the option that best matches the type of work your team does



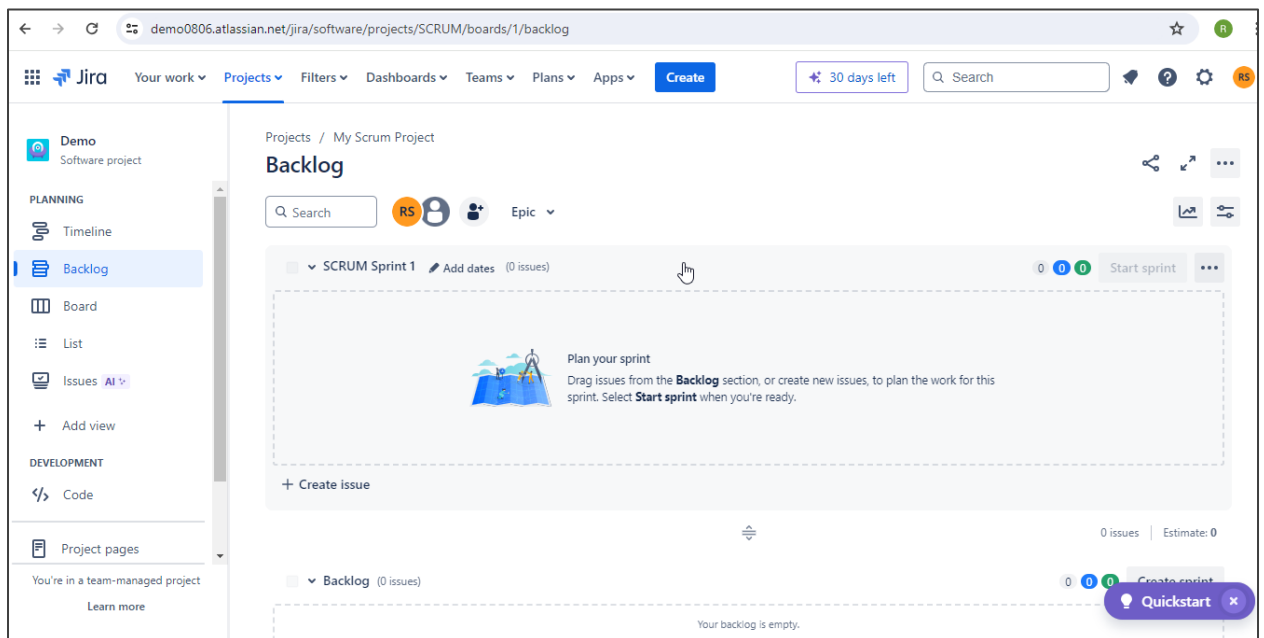
1.8 Select the type of template required, and then click **Start now**



1.9 Add the desired name (**Demo**) for your project in the **Name your project** field, and then click **Get started**

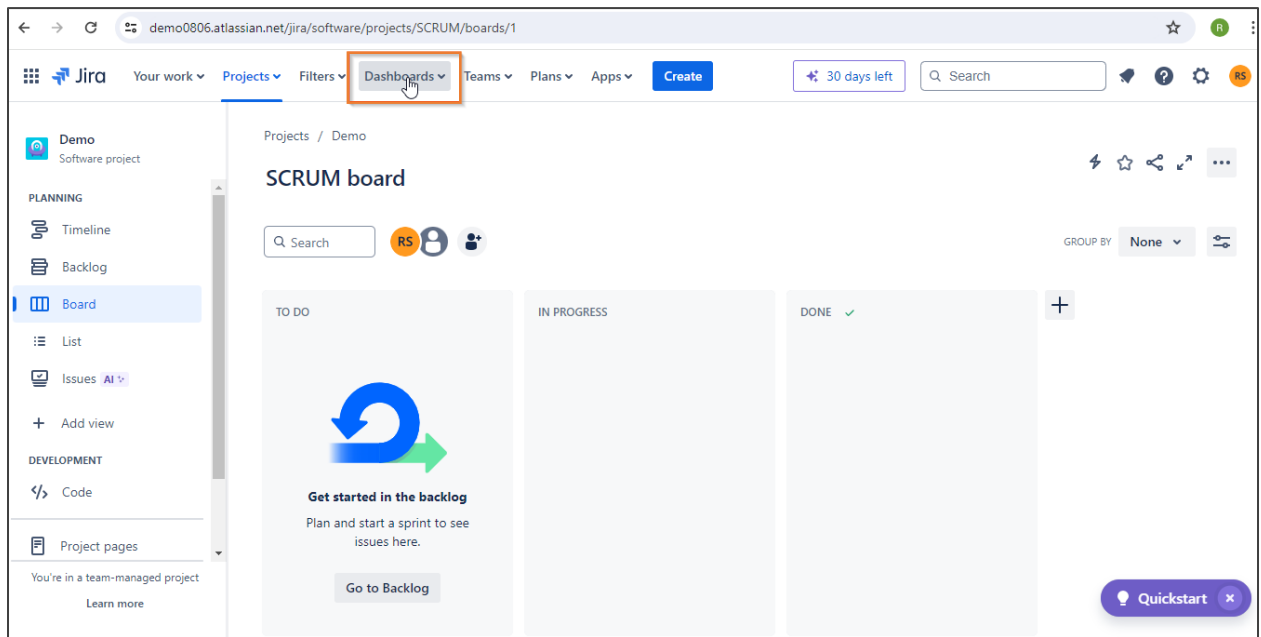


The following interface appears:

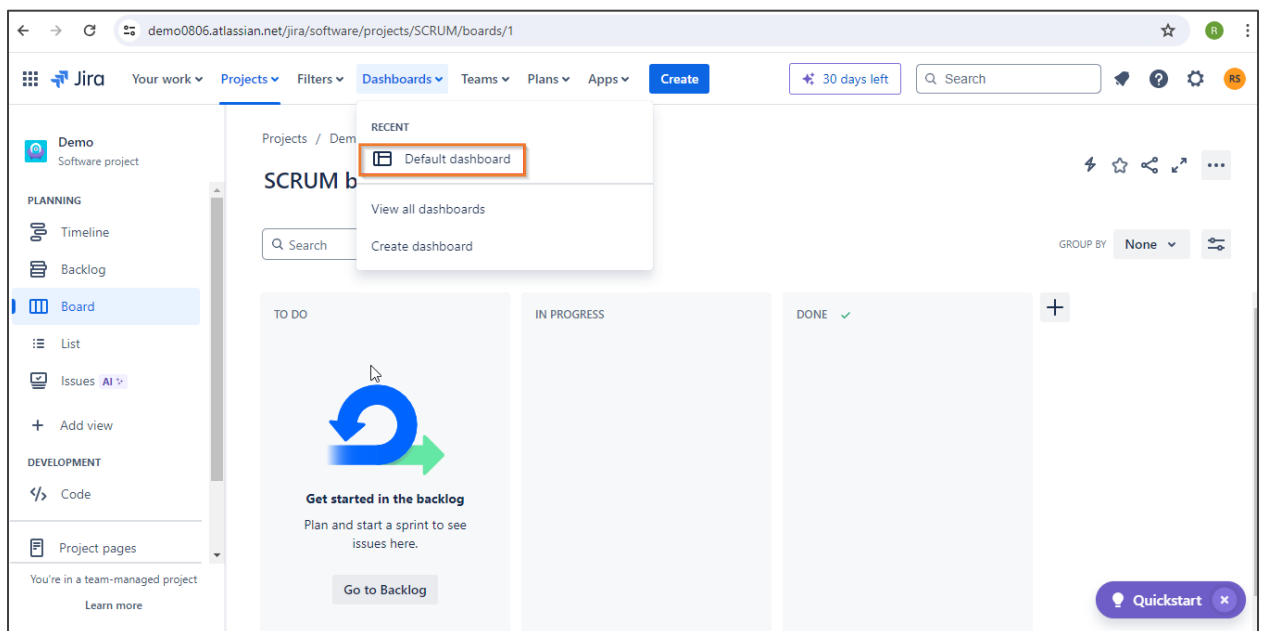


Step 2: Creating a Jira dashboard

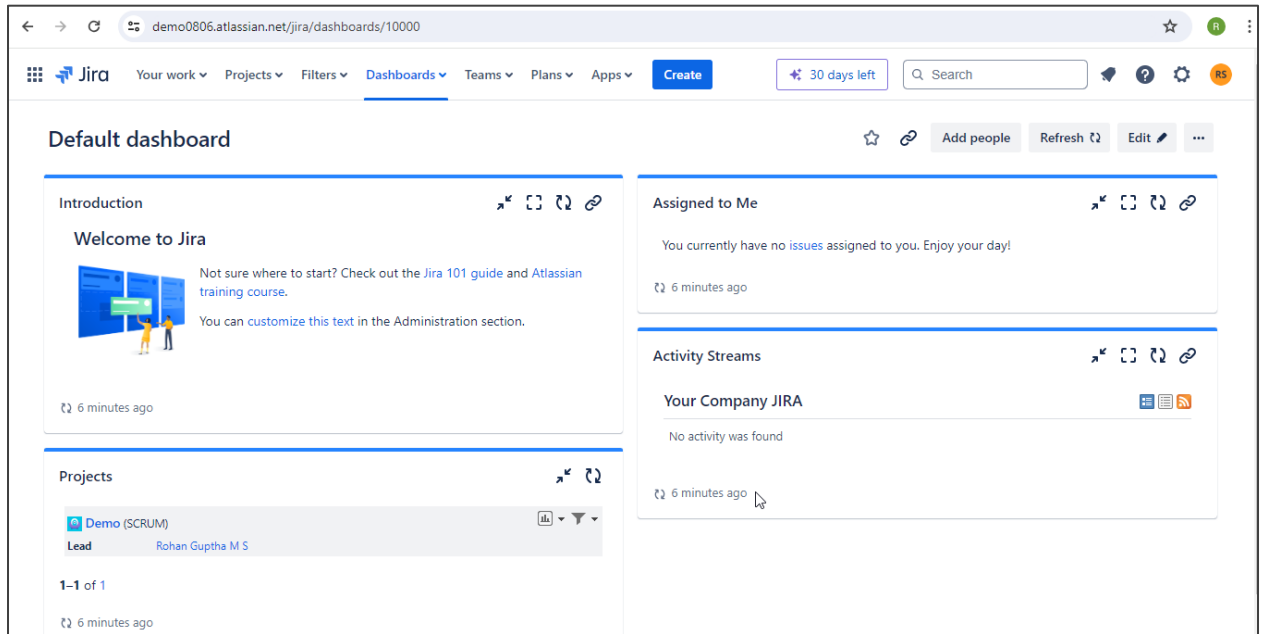
2.1 Click **Dashboards** from the top navigation bar



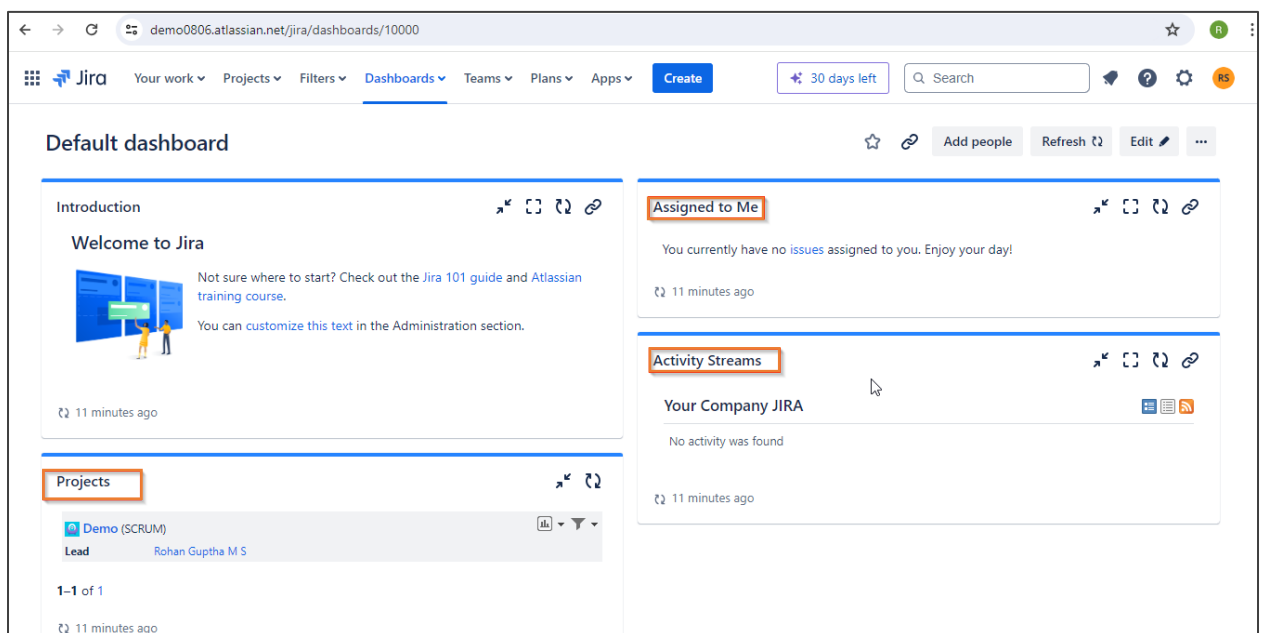
2.2 Select **Default Dashboard** to view the default dashboard



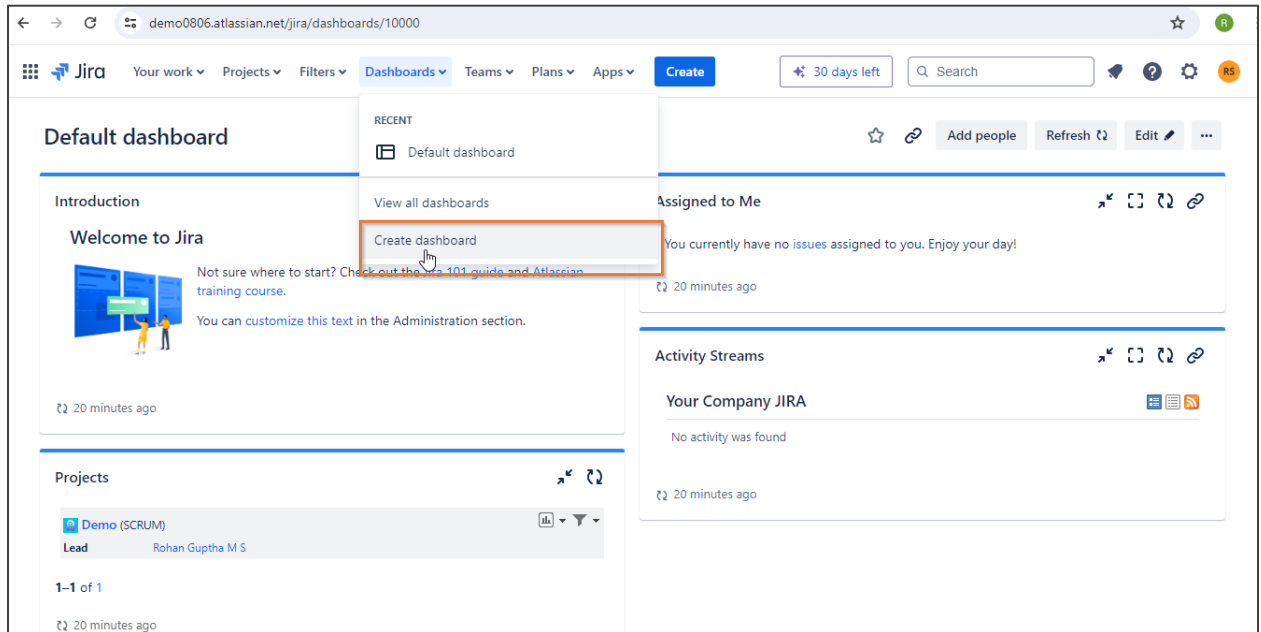
The following interface appears with various gadgets displaying information about your projects and tasks:



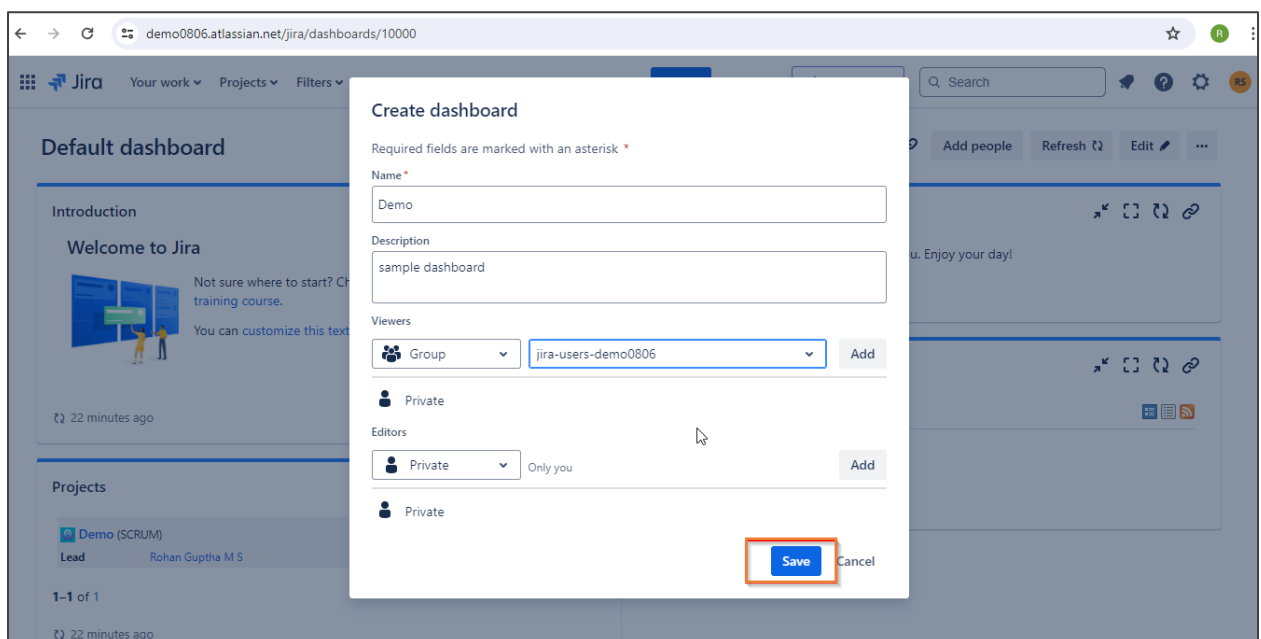
2.3 Review the different gadgets on the **Default dashboard** page, such as **Assigned to Me**, **Activity Streams**, and **Projects**



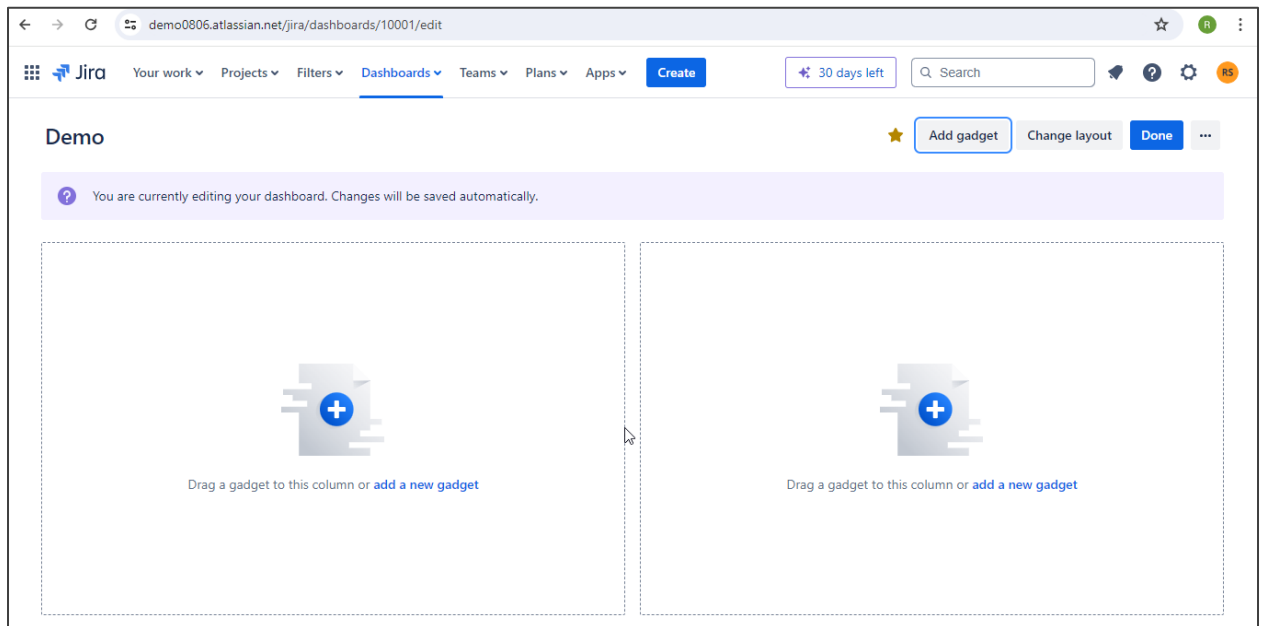
2.4 Click on the **Dashboards** dropdown and select **Create dashboard** to create a new dashboard



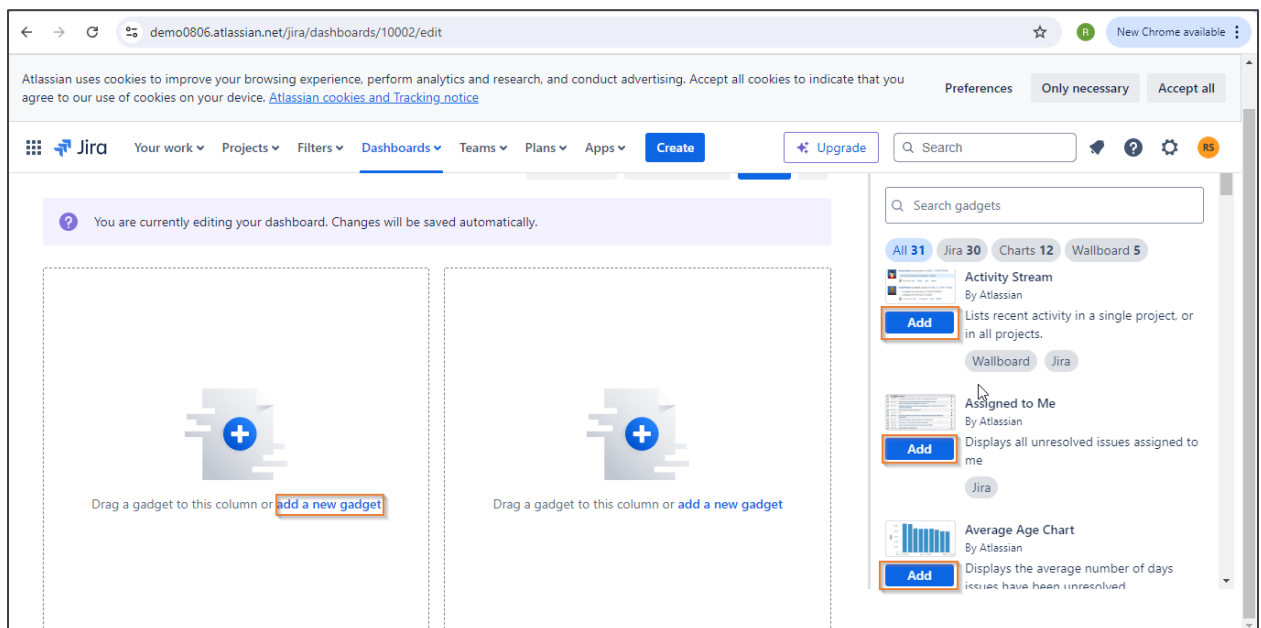
2.5 Enter the details for **Name** and **Description** fields for your new dashboard, set the sharing preferences under the **Editors** section, and then click **Save**



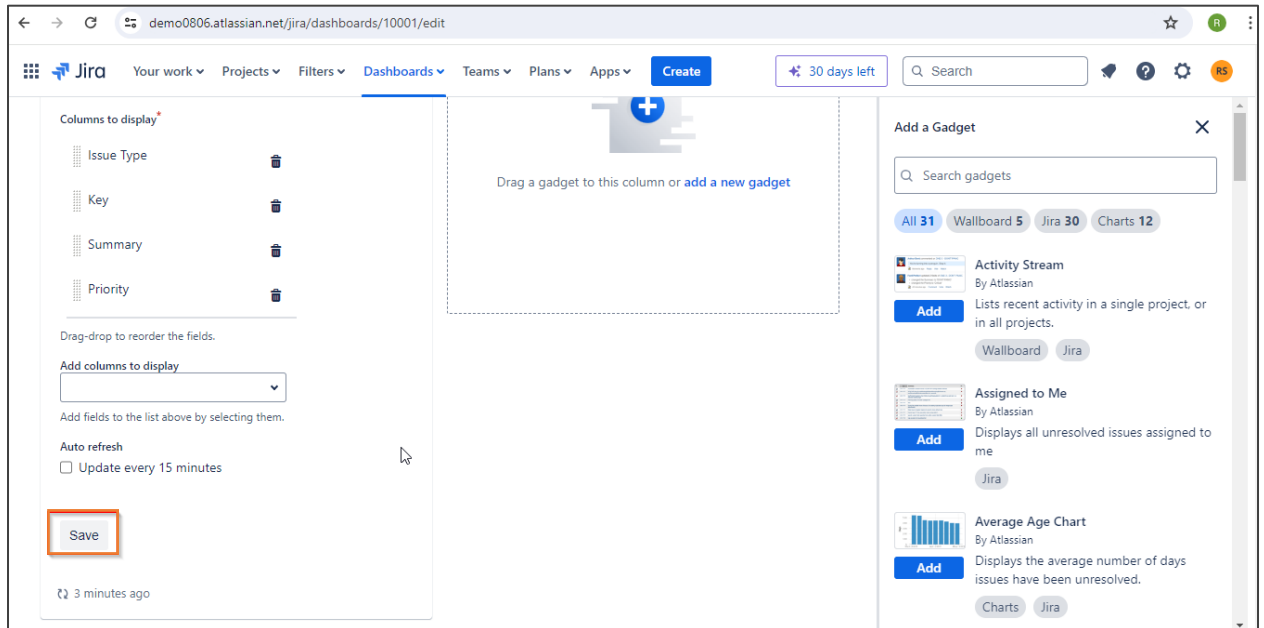
The following interface appears:



2.6 To add gadgets to the dashboard, click on **add a new gadget** and select the gadgets you want to include, such as **Activity Stream**, **Assigned to Me**, **Average Age Chart**

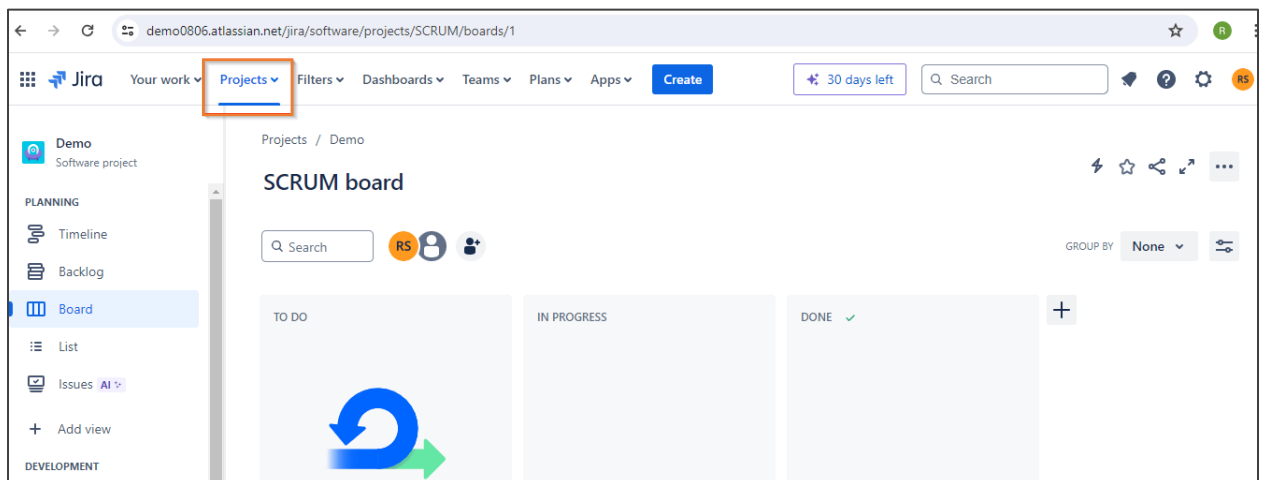


2.7 Once the required gadgets are added to the dashboard, click **Save** and start using the dashboard

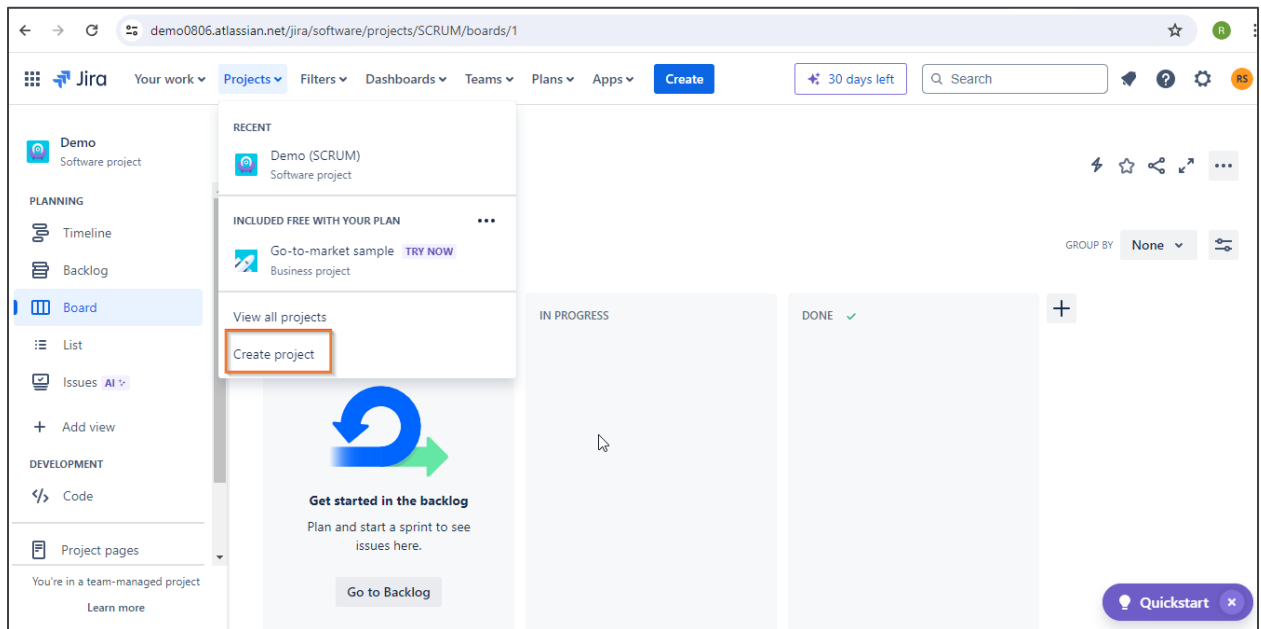


Step 3: Creating a custom project

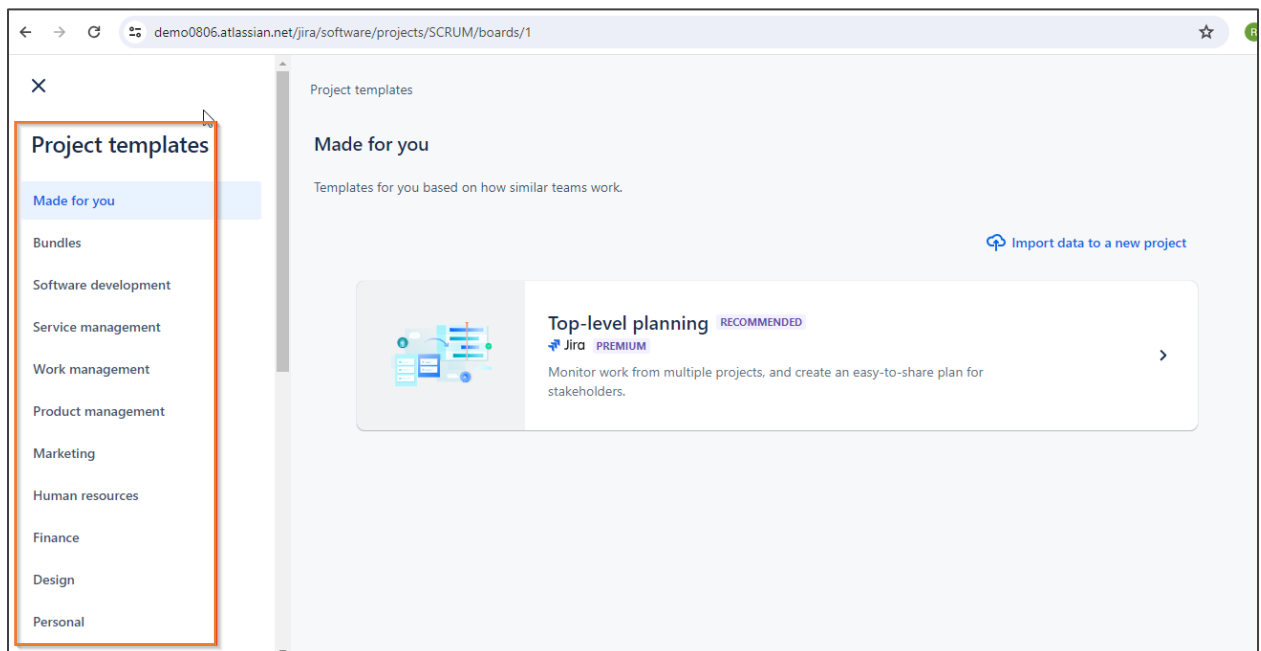
3.1 Click on the **Projects** dropdown from the top navigation bar



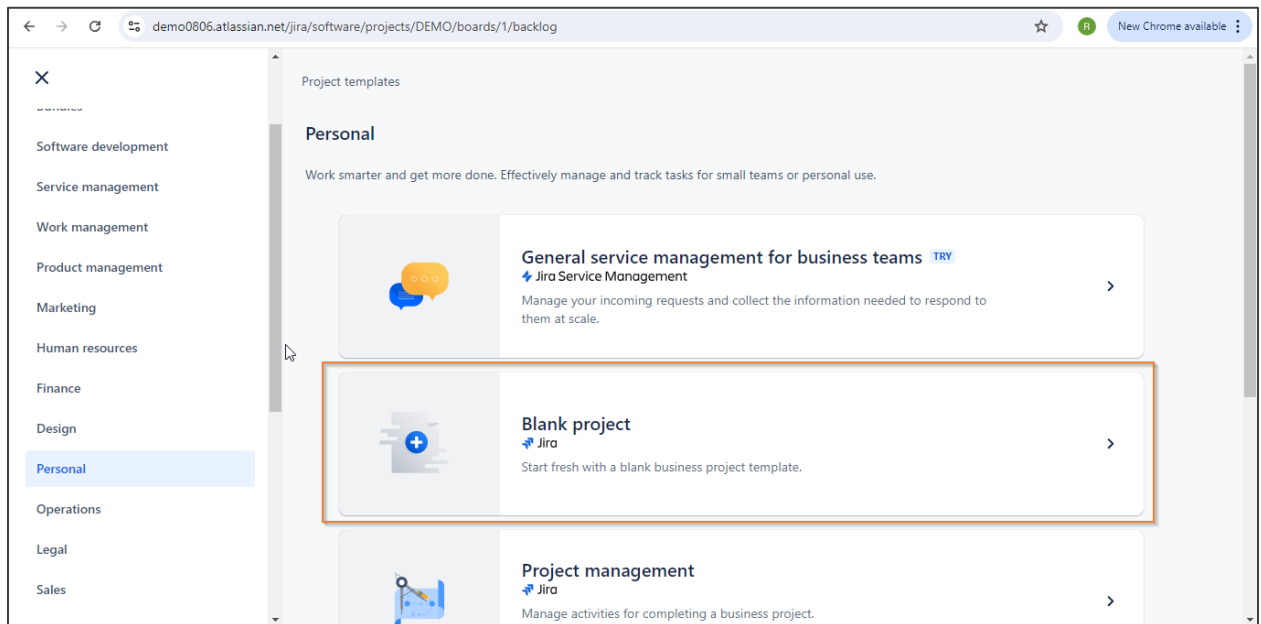
3.2 Select the **Create project** option to create a new customized project



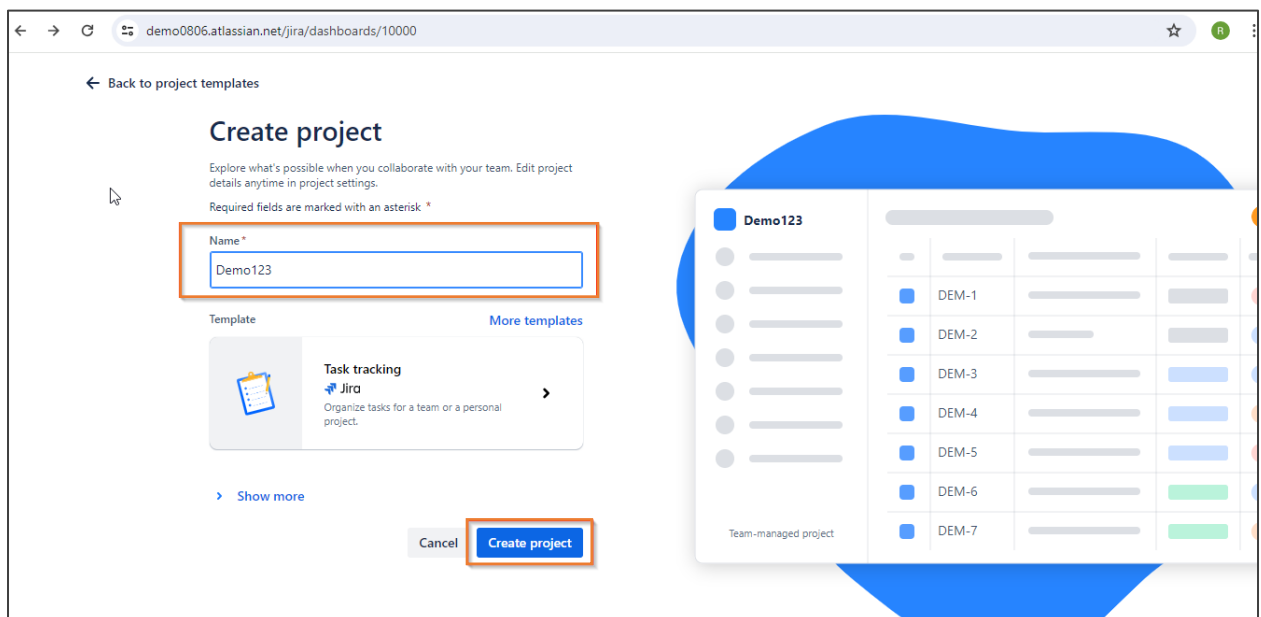
3.3 Select **Personal** template from **Project templates**



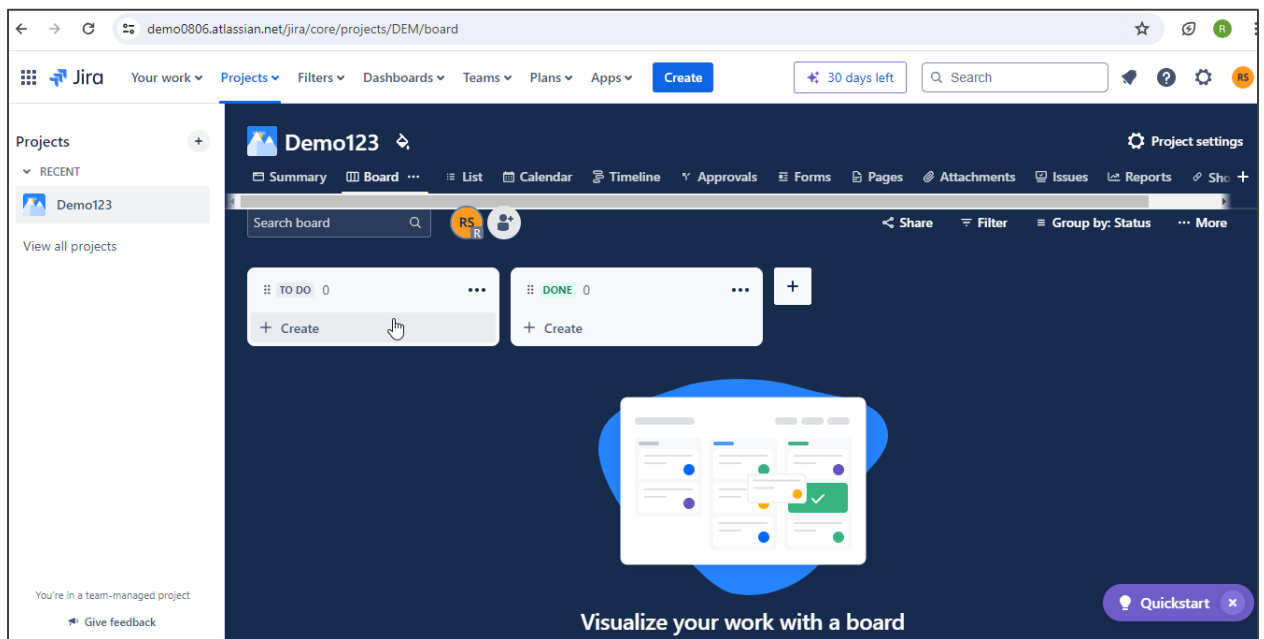
3.4 Select Blank project



3.5 Enter the name of the project (Demo123) and then click Create project



The project has been successfully created as shown below:



By following these steps, you have successfully demonstrated the process of creating a Jira account, creating dashboards, and configuring customized projects for efficient project management.