Step 1: Create a Kanban Board

When you log in to Jira Software, you have the option to create a project. Jira provides a complete Kanban software development template. Select this as the project type as it equips you with a digital Kanban board that helps to visualize and track workflow.
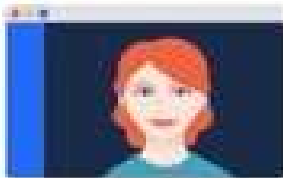
Create project

Name

Enter a project name

Key

ⓘ

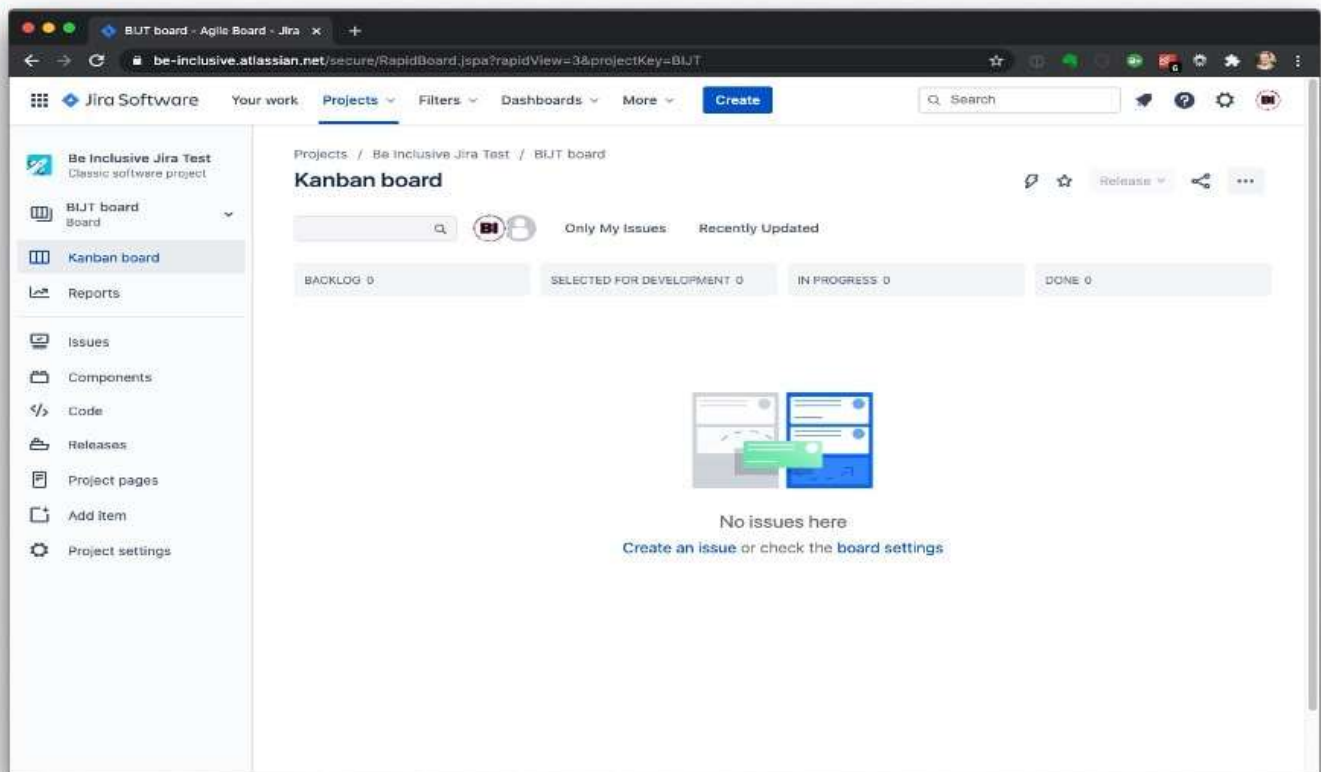☐ Share settings with an existing project

Template

External service desk

Collect bug reports and answer customer questions ◦ Suits teams who want a branded support experience

Change template

Create

Credit: Atlassian

Credit: Atlassian

Once you create the project, the Kanban board is the first thing you see. Here, your team has the flexibility to plan and execute work on a regular basis.

Step 2: Configure the Jira Kanban Board

Jira Software offers a standard workflow template for the Kanban project that includes Backlog, Selected for Development, In Progress, and Done. This allows the product owner to add tasks to the backlog and label them as "ready for development" following completion.

Use the Kanban board settings to customize the board. To do this, click the ellipses in the top right-hand corner of the screen. Here, you have a range of selections, from the number of columns to quick filters. You also have the option to edit Work In Progress limits (WIP limits). The purpose of WIP limits is to set a minimum and maximum number of tickets.

☆ Complete sprint ⌁ •••

Board settings

Create board

Hide menus

Show detail view

Open issues in dialog

Expand all swimlanes

Collapse all swimlanes

Hide epic labels

Team members use the various columns to signify whether a project is in-progress or done. However, you can configure the workflow status according to your preference. To remove a column, select the trash icon and select 'Back' to board to return to the Kanban board.

Once you finish customizing your board settings, you are free to add items to the backlog.

Step 3: Add Items to the Backlog

Jira refers to items such as Tasks, Bugs, Epics, and Stories as issues.

Click on the 'Create' tab, then from the issues menu, select the issue type to add it to your backlog. In Kanban, these appear as the first column of your board. When creating issues, you have the ability to include a brief summary and a description that outlines all the issue details.

Credit: Atlassian

You also have the option to attach documents, images, or video recordings that assist the kanban team. Use the 'Details' tab to assign and reassign issues to the various team members and be sure to select an appropriate priority level when doing so. Take note that you can update any item or issue to reflect the workflow status.

Step 4: Prioritize the Backlog

Kanban teams focus on work that is in progress. For this reason, it is necessary to rank the items in the backlog according to their priority.

To do this, drag and drop cards throughout the first column to arrange them by importance. As a default setting, the Kanban board includes swimlanes which help you categorize issues so that team members are aware of what to work on next. To edit these defaults, go to board configuration in the upper right-hand corner of the backlog and select 'Swimlanes'.
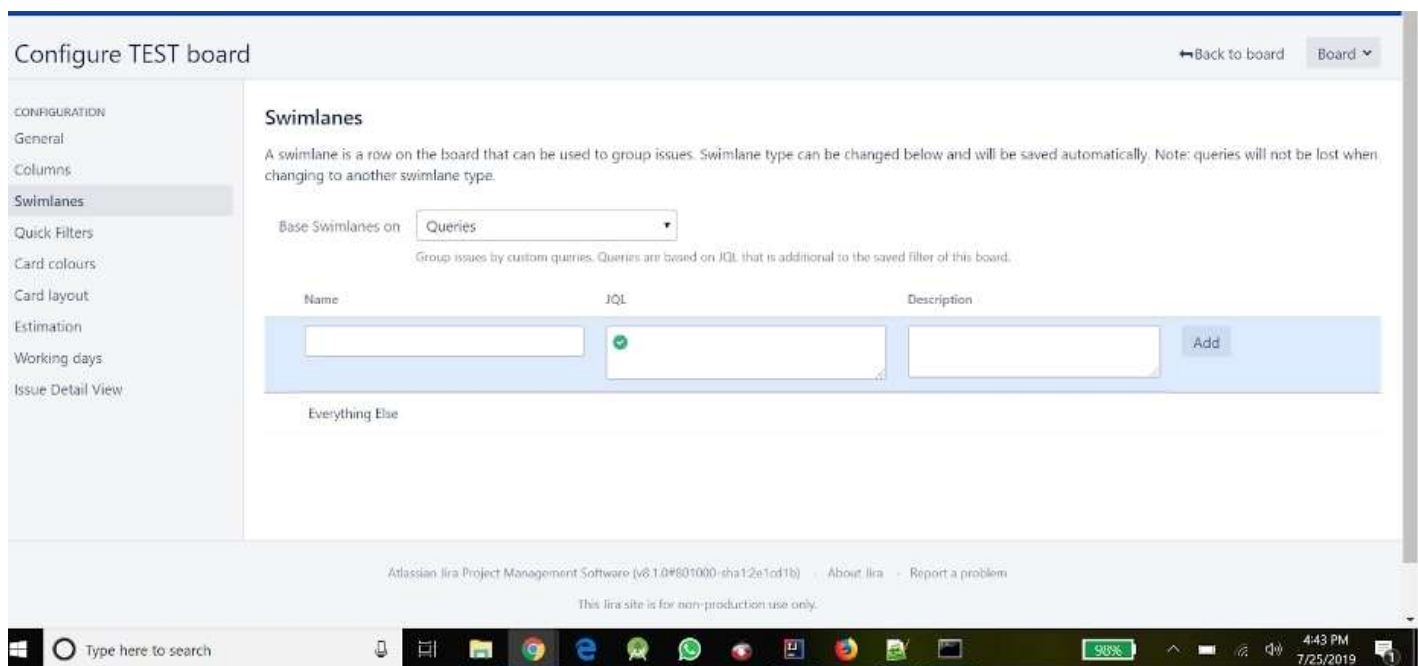
Credit: Atlassian

Jira Software allows you to keep track of issues, in particular the ones with high-priority labels such as bugs. It apprises team members of urgent matters by increasing the visibility of the workflow.

	Blocker	Critical	Major	Highest	High	Medium	Low	Lowest	Minor	Trivial
OLD	⊘	↑	≫	↑	↑	↑	↓	↓	≫	↓
NEW	⊖	🔻	≫	≫	⌃	=	⌄	≫	≫	○

Credit: Atlassian

Step 5: Enable the Kanban Backlog

Since the Kanban methodology facilitates multiple ongoing projects, it is typical that the initial backlog (the first column) becomes lengthy and difficult to manage. Consider enabling the Kanban backlog which provides more space to plan work for the team.

The Kanban backlog creates a separate backlog that appears on a different tab on the board. With more space, product managers have more flexibility to build and prioritize the backlog without hindering the progress of the team. The product manager is also free to move work from the backlog to keep the team in the loop about any upcoming projects.

To access the Kanban backlog, log in as a Jira Administrator, then select 'Jira Administration' from the top bar. Next, select 'Applications' and scroll down to Jira Software, then Jira Software Labs. Select the features you prefer.

Step 6: Hold Team Meetings

A key aspect of the Kanban framework is hosting team meetings. Although they are optional, having daily stand-ups is an efficient way to report on the team's progress.

In Jira Software, you have the choice to generate various board reports and diagrams that illustrate the status of the team's work in progress over a specific period of time. The diagrams show the fluctuations in workflow by taking into account the number of issues or backlogs that are incomplete.
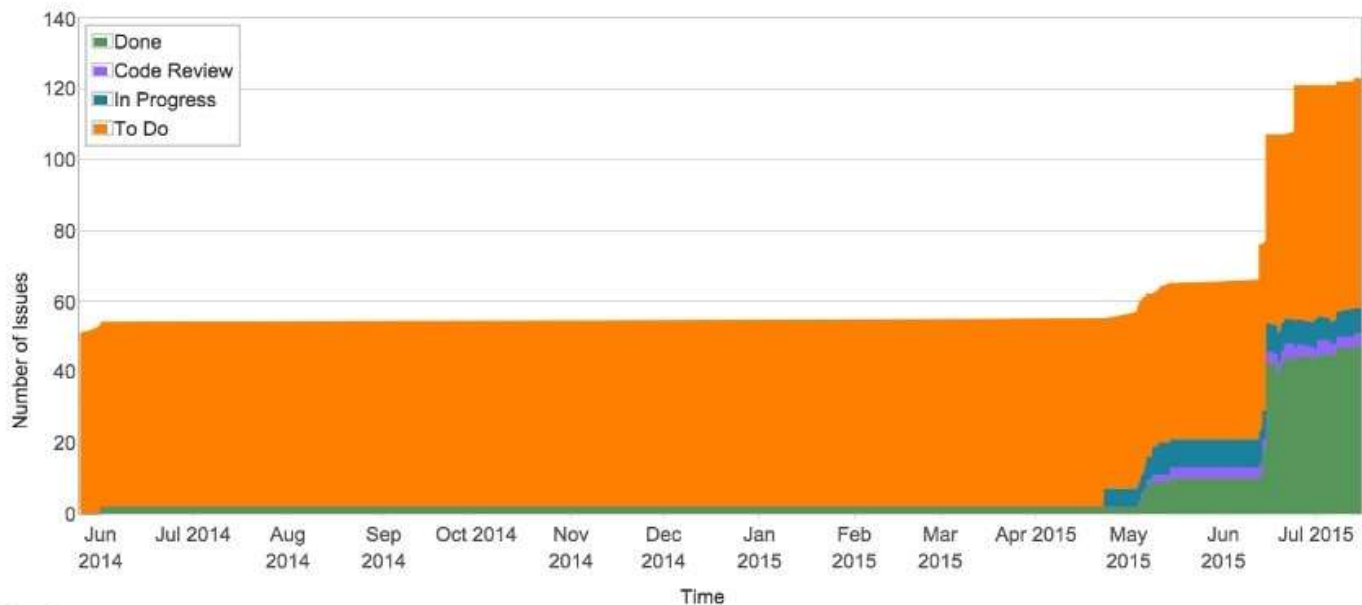
ⓘ **How to read this chart**

Shows the statuses of issues over time. This helps you identify potential
bottlenecks that need to be investigated.

Hide this information

Cumulative Flow Diagram

25/May/14 to 16/Jul/15 (All Time) ·   Refine report ·

Overview

Click and drag cursor across chart or chart overview to select date range (double-click overview to reset).

Credit: Atlassian

On the whole, this feature helps the team improve and manage workflows so that no one falls too
far behind.

Step 7: Use the Control Chart

Another Jira tool for tracking Jira issues and the kanban team's work in progress is the Control
Chart. This is another report you can generate from the board, which allows you to see the cycle
time of your issues.

Analyzing the cycle time of the team is an essential metric for Kanban teams because it demonstrates the following:

- The length of time each issue remains within a particular status
- The average amount of time it takes to complete an issue (cycle time)
- The team's average cycle time (a low average reflects better efficiency)
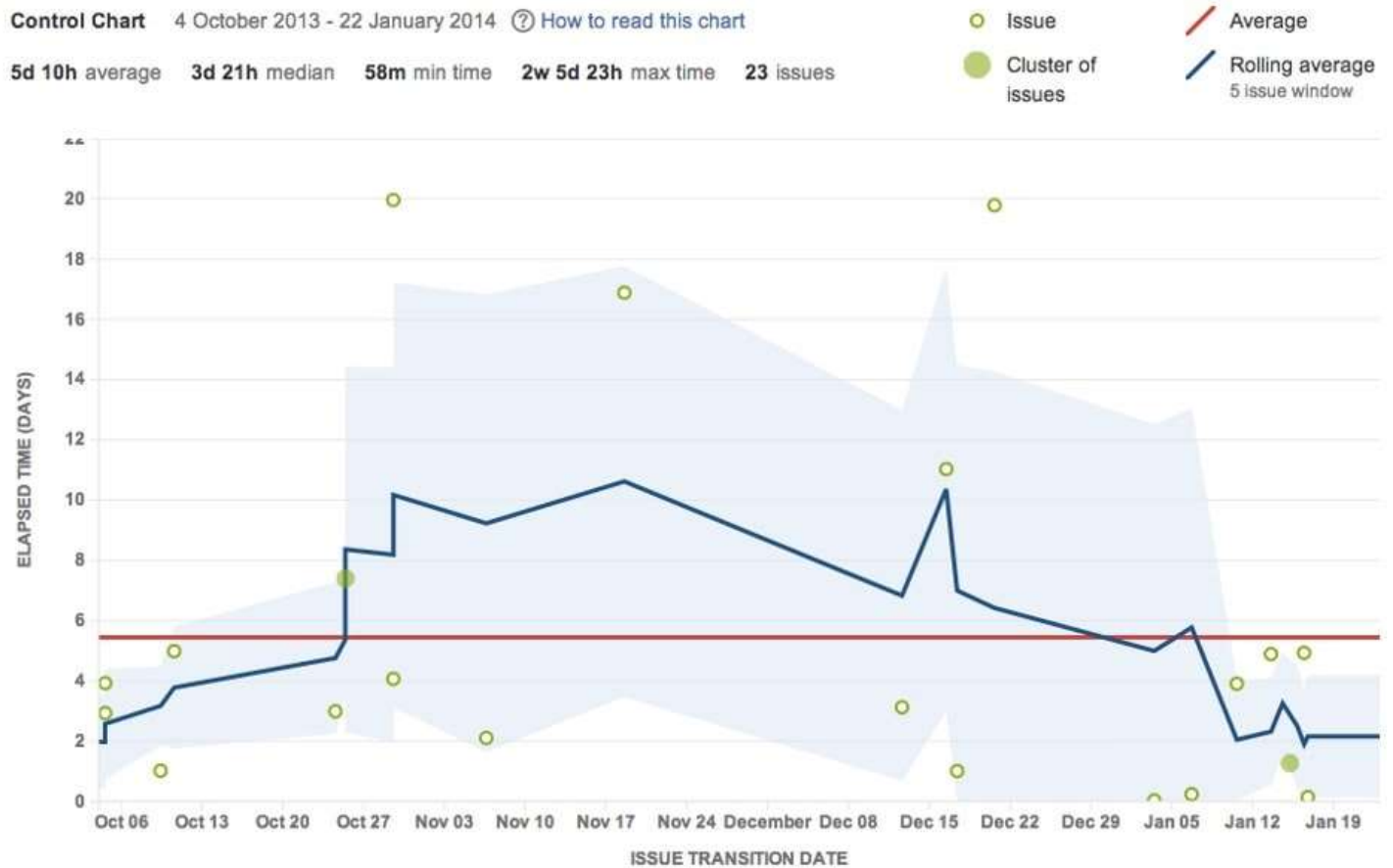
Credit: Atlassian

Overall, the Control Chart helps you determine what changes to make to the workflow to avoid bottlenecks, reduce project complexity and increase efficiency across the team.

Jira Kanban Tutorial: Key Takeaways

Every software development project stands to benefit from using the Kanban methodology as it allows them to create visual representations of each new project. A product owner that makes it their duty to learn Jira and use it to create a digital Kanban board, gains a better understanding of how to manage workflows, conduct issue tracking, and embrace all the details that allow them to maximize the efficiency of any Kanban software development project.