Exercise 6: Interpreting Reports for Kanban (Control Chart)

In this exercise, you'll learn how to create a Kanban project with sample data, create a Kanban board, and interpret a Control Chart to analyze the flow of work and identify areas for improvement. The Control Chart in Jira shows the Cycle Time (or Lead Time) for your product, version, or sprint over a specified period, allowing you to identify trends or anomalies[1].

Part 1: Create a Kanban Project with Sample Data

1. **Log in to Jira**:
   - Access your Jira instance and log in with your credentials.
2. **Create a New Project**:
   - Click on “Projects” in the navigation bar, then click on “Create Project”.
   - Select the “Company-managed” project type.
3. **Select Kanban Template**:
   - Choose the "Kanban" template for your new project.
   - If prompted, select the option to create a Kanban board with sample data.

Part 2: Navigate to the Control Chart

1. **Access Your Kanban Board**:
   - Navigate to your newly created Kanban project.
   - Click on "Projects" in the navigation bar and select your project.
   - Now, click on “Board” from the project menu to access your Kanban board[2].
2. **Navigate to Reports**:
   - Click on “Reports” on the left-hand sidebar or from the project menu.
   - Select "Control Chart" from the list of reports available[3].

Part 3: Interpret the Control Chart

1. **Understanding the Control Chart**:
   - The Control Chart displays the Cycle Time or Lead Time for your product, version, or sprint over a specified period[1].
   - You can view issue details by selecting a dot, zoom in to focus on a specific time period, change the time scale, and refine the report by selecting the columns, filters, and swimlanes you want data for[4].
2. **Configuring the Control Chart**:
   - If needed, configure the chart by selecting the timeframe, columns, or Swimlanes from the quick filter provided below[5].
3. **Analyzing the Data**:
   - Look for trends or anomalies in the data, such as unusually high Cycle Times or variations in the average Cycle Time.
4. **Sharing Insights**:

- Discuss the insights derived from the Control Chart with your team, focusing on how to improve the flow of work and reduce Cycle Time.

This exercise provides a structured approach to understanding and analyzing the flow of work in a Kanban project using the Control Chart in Jira. By reviewing the Cycle Time data, you can identify areas for improvement and work towards optimizing your team's performance.

Exercise 7: Interpreting Reports for Kanban (Cumulative Flow Diagram)

In this exercise, you'll learn how to interpret a Cumulative Flow Diagram (CFD) in a Kanban project using the sample data on a Jira Board. A CFD illustrates the flow of work items (such as tasks, bugs, or stories) through different statuses in a project over time. This visual tool helps teams gauge the stability of the workflow and pinpoint potential issues related to work progress.

Part 1: Create a Kanban Project with Sample Data

1. **Log in to Jira**:
   - Access your Jira instance and log in with your credentials.
2. **Create a New Project**:
   - Click on "Projects" in the navigation bar, then click on "Create Project".
   - Select the "Company-managed" project type.
   - Choose the "Kanban" template for your new project.
   - If prompted, select the option to create a Kanban board with sample data.

Part 2: Navigate to the Cumulative Flow Diagram

1. **Access Your Kanban Board**:
   - Navigate to your newly created Kanban project.
   - Click on "Projects" in the navigation bar and select your project.
   - Click on "Board" from the project menu to access your Kanban board.
2. **Navigate to Reports**:
   - Click on "Reports" on the left-hand sidebar or from the project menu.
   - Select "Cumulative Flow Diagram" from the list of reports available.

Part 3: Interpret the Cumulative Flow Diagram

1. **Understanding the Cumulative Flow Diagram**:
    - The Cumulative Flow Diagram (CFD) is board-specific, meaning it will only include issues that match your board's saved filter.
    - It is based on your board's column mapping. An issue is considered to be 'To Do' when it is in a status that has been mapped to the left-most column of your board. Similarly, an issue is considered to be 'Done' when it is in a status that has been mapped to the right-most column of your board.
    - The CFD keeps track of how many issues are passing through each column of your board, helping you see which columns accumulate more issues than others[1].
2. **Viewing the Cumulative Flow Diagram**:
    - Go to the project where your board is located, then select your board from the Board menu.
    - Click `Reports`, then select `Cumulative Flow Diagram`.
    - To refine the data shown in the report, click `Refine report`, and select the desired filters.
    - To select a different timeframe, click the date range drop-down at the top of the chart.
    - To select a different date range, drag your cursor across the 'Overview' at the bottom of the chart[2][1].
3. **Analyzing the Data**:
    - The X-axis represents time, while the Y-axis represents the number of work items in a particular status.
    - Each colored area of the chart equates to a workflow status (i.e., a column on your board), showing the number of issues in each state over time[3][4].
    - Look for areas where the bands are widening, which indicates increasing Work in Progress (WIP) or blockages.
    - A narrowing of bands could indicate a reduction in WIP or an improvement in throughput.
4. **Sharing Insights**:
    - Discuss the insights derived from the CFD with your team, focusing on how to improve the flow of work and reduce Work in Progress (WIP).
    - Share your findings with the broader organization to foster a culture of continuous improvement.

Reflection:

- Reflect on the lessons learned from interpreting the Cumulative Flow Diagram and how these insights can be applied to improve your Kanban process.

This exercise guides you through the process of interpreting a Cumulative Flow Diagram in a Kanban project using Jira. By reviewing the flow of work items through various statuses over time, you can identify bottlenecks, manage work in progress, and work towards optimizing your team's performance.