Exercise 1 – Configuring the System/Default Dashboard

Objective:

To learn how to configure the System/Default Dashboard in Jira to display relevant project information.

Prerequisites:
- Access to a Jira account with necessary permissions.
- Sample data loaded onto a Jira board.

Tools & Materials:
- A computer with internet access.
- A web browser.

Instructions:

1. **Login to Jira:**
   - Launch your web browser and navigate to the Jira login page (e.g., `https://<your-domain>.atlassian.net`).
   - Enter your username and password to login to your Jira account.

2. **Accessing the System/Default Dashboard:**
   - Once logged in, locate and click on the "Dashboards" menu item at the top of the screen.
   - The first page you will see is your System/Default Dashboard.

3. **Entering Edit Mode:**
   - Find and click on the "..." (more options) icon usually located at the top right corner of the dashboard.
   - Select "Edit Dashboard" from the dropdown menu to enter the edit mode.

4. **Adding Gadgets:**
   - Click on the "Add Gadget" button, usually located at the top right corner.
   - Browse through the available gadgets, and click on the "Add gadget" button next to the gadgets you want to add to your dashboard.

5. **Configuring Gadgets:**
   - Once a gadget is added, click on the small triangle at the top right corner of the gadget box to expand the menu.
   - Click on "Edit" to configure the gadget settings as per your preferences. For example, you may want to select a particular project or filter.

6. **Moving and Resizing Gadgets:**
   - Hover over the gadget title bar to turn the cursor into a move icon (four arrows).
   - Click and drag to move the gadget to a new location on the dashboard.
   - To resize a gadget, hover over the bottom right corner until the cursor turns into a resize icon (two arrows), then click and drag to resize.

7. **Saving Your Changes:**
   - Once you are satisfied with the configurations and layout, click on the "Save" button, usually located at the top right corner, to save your changes.

8. **Exiting Edit Mode:**

- Click on the "Exit Edit Mode" button or simply click on the "Dashboards" menu item again to exit the edit mode and view your updated System/Default Dashboard.

Assessment:
- Were you able to add and configure gadgets on the System/Default Dashboard?
- Could you move and resize gadgets to organize the dashboard layout?
- Were you able to save your changes and view the updated dashboard?

Reflection:
- Reflect on how configuring the dashboard can help in better project management and in getting a quick overview of project status.

Exercise 2 – Viewing Available Dashboards

Objective:

To familiarize participants with navigating and viewing available dashboards in Jira.

Prerequisites:
- Access to a Jira account with the necessary permissions.
- Sample data loaded onto a Jira board.

Tools & Materials:
- A computer with internet access.
- A web browser.

Instructions:
1. **Login to Jira:**
   - Launch your web browser and navigate to the Jira login page (e.g., `https://<your-domain>.atlassian.net`).
   - Enter your username and password to log in to your Jira account.
2. **Accessing Dashboards:**
   - Once logged in, look for the "Dashboards" menu item at the top of the screen.
   - Click on "Dashboards" to view the list of available dashboards.
3. **Navigating through Dashboards:**
   - In the Dashboards menu, you'll see a list of available dashboards. Each dashboard has a name and possibly a description.
   - Click on the name of a dashboard to view it. This will take you to the dashboard where you can see various gadgets and information related to your projects.
4. **Identifying Dashboard Components:**
   - Explore the dashboard to identify various components like filters, gadgets, and project summaries.
   - Take note of the different types of information available on the dashboard such as project status, recent activities, and assigned tasks.
5. **Switching Between Dashboards:**

- Go back to the "Dashboards" menu item at the top of the screen.
- Click on a different dashboard name to view another dashboard.
- Explore the different dashboards available to get a feel for the variety of information that can be displayed.

6. **Using the Search Function (Optional):**
   - If there are many dashboards, utilize the search function to quickly find a specific dashboard by its name.

7. **Accessing Dashboard Directory (Optional):**
   - Click on "View All Dashboards" or "Dashboard Directory" to view a list of all available dashboards, along with their descriptions and owners.
   - From here, you can also choose to mark certain dashboards as favorites for easier access in the future.

Assessment:
- Are you able to navigate through the available dashboards and identify key components?
- Can you switch between different dashboards?
- (Optional) Were you able to use the search function to find a specific dashboard?
- (Optional) Did you access the Dashboard Directory and mark a dashboard as a favorite?

Reflection:
- Reflect on how dashboards can help in organizing and viewing project-related information efficiently.

Exercise 3 – Creating a Dashboard for a Scrum Master and Selecting and Configuring an Issue Gadget

Objective:
To create a custom dashboard for a Scrum Master and configure an Issue Gadget to monitor specific project issues.

Prerequisites:
- Access to a Jira account with the necessary permissions.
- Sample data loaded onto a Jira board.

Tools & Materials:
- A computer with internet access.
- A web browser.

Instructions:
1. **Login to Jira:**
   - Launch your web browser and navigate to the Jira login page (e.g., `https://<your-domain>.atlassian.net`).
   - Enter your username and password to login to your Jira account.
2. **Creating a New Dashboard:**

- Once logged in, click on the "Dashboards" menu item at the top of the screen.
- Click on "Create dashboard" button.
- Enter a name (e.g., "Scrum Master Dashboard") and description for your new dashboard.
- Click on the "Submit" button to create your dashboard.

3. **Adding Gadgets:**
   - Click on the "Add Gadget" button, usually located at the top right corner of the dashboard.
   - Browse through the available gadgets and click on the "Add gadget" button next to the gadgets you want to add to your dashboard. (e.g., Sprint Burndown Gadget, Sprint Health Gadget, etc.)

4. **Adding and Configuring the Issue Gadget:**
   - Find the Issue Gadget from the available gadgets list and click on "Add gadget" next to it.
   - Click on the small triangle at the top right corner of the Issue Gadget box to expand the menu.
   - Click on "Edit" to open the configuration settings.
   - Select the project and other criteria (e.g., issue type, status, assignee, etc.) you want to monitor in the Issue Gadget.
   - Click on the "Save" button to save your configuration settings.

5. **Organizing Gadgets:**
   - Hover over the gadget title bar to turn the cursor into a move icon (four arrows).
   - Click and drag to move the gadget to a new location on the dashboard.
   - To resize a gadget, hover over the bottom right corner until the cursor turns into a resize icon (two arrows), then click and drag to resize.

6. **Reviewing Dashboard Configuration:**
   - Review the arrangement and configuration of the gadgets on your dashboard to ensure they meet the Scrum Master's needs.
   - Make any necessary adjustments by moving, resizing, or re-configuring gadgets as needed.

Assessment:
- Were you able to create a new dashboard and add relevant gadgets for a Scrum Master?
- Could you successfully add and configure the Issue Gadget to monitor specific project issues?
- Did you organize the gadgets on the dashboard for easy viewing and access?

Reflection:
- Reflect on the importance of a well-configured dashboard for a Scrum Master in effectively monitoring and managing a Scrum project.
- Consider how the Issue Gadget can provide insights into project issues and help in decision-making.

Exercise 4 – Copying a Dashboard for a Developer and Sharing a Dashboard

Objective:

To create a copy of an existing dashboard tailored for a developer and share the dashboard with team members.

Prerequisites:

- Access to a Jira account with the necessary permissions.
- Sample data loaded onto a Jira board.

Tools & Materials:

- A computer with internet access.
- A web browser.

Instructions:

1. **Login to Jira:**
   - Launch your web browser and navigate to the Jira login page (e.g., `https://<your-domain>.atlassian.net`).
   - Enter your username and password to login to your Jira account.

2. **Accessing Dashboards:**
   - Once logged in, click on the "Dashboards" menu item at the top of the screen.
   - Select the dashboard you want to copy from the list of available dashboards.

3. **Copying a Dashboard:**
   - Click on the "…" (more options) icon, usually located at the top right corner of the dashboard.
   - Select "Copy Dashboard" from the dropdown menu.
   - Enter a name (e.g., "Developer Dashboard Copy") and description for the copied dashboard.
   - Click on the "Copy" button to create a copy of the dashboard.

4. **Tailoring the Copied Dashboard:**
   - Click on the "…" (more options) icon again and select "Edit Dashboard" to enter the edit mode.
   - Add, remove, or reconfigure gadgets to tailor the dashboard for a developer (e.g., add "Assigned to Me" gadget, remove unrelated gadgets, etc.).
   - Click on the "Save" button to save your changes.

5. **Sharing the Dashboard:**
   - Click on the "…" (more options) icon and select "Share Dashboard" from the dropdown menu.
   - In the "Share with" section, choose the groups, projects, or individuals you want to share the dashboard with.
   - Optionally, add a message to be sent along with the dashboard share notification.
   - Click on the "Share" button to share the dashboard.

6. **Verifying Dashboard Sharing:**
   - Ask a colleague or check another account to confirm that the shared dashboard is accessible and viewable as expected.

Assessment:

- Were you able to successfully copy an existing dashboard and tailor it for a developer?

- Could you share the tailored dashboard with specified groups, projects, or individuals?
- Did the shared dashboard appear as expected on the recipients' dashboard list?

- Reflect on how copying and sharing dashboards can promote collaboration and transparency within a project team.
- Consider how a tailored dashboard can help a developer in managing their tasks and monitoring project progress.

Exercise 5 – Creating a Wallboard (optional)

Objective:

To create a Wallboard in Jira for visualizing project status and key metrics.

Prerequisites:
- Access to a Jira account with the necessary permissions.
- Sample data loaded onto a Jira board.

Tools & Materials:
- A computer with internet access.
- A web browser.
- (Optional) A large screen or projector for displaying the Wallboard.

Instructions:

1. **Login to Jira:**
   - Launch your web browser and navigate to the Jira login page (e.g., `https://<your-domain>.atlassian.net`).
   - Enter your username and password to login to your Jira account.
2. **Accessing Dashboards:**
   - Once logged in, click on the "Dashboards" menu item at the top of the screen.
3. **Creating a New Dashboard:**
   - Click on the "Create dashboard" button.
   - Enter a name (e.g., "Project Wallboard") and description for your new dashboard.
   - Click on the "Submit" button to create the dashboard.
4. **Adding Gadgets:**
   - Click on the "Add Gadget" button, usually located at the top right corner of the dashboard.
   - Browse through the available gadgets and click on the "Add gadget" button next to the gadgets you want to add to your dashboard (e.g., Sprint Burndown Gadget, Sprint Health Gadget, etc.).
5. **Configuring Gadgets:**
   - Click on the small triangle at the top right corner of each gadget box to expand the menu.
   - Click on "Edit" to configure the gadget settings as per your preferences (e.g., selecting a particular project or filter).
   - Click on the "Save" button to save your configuration settings.

6. **Creating a Wallboard:**	
	• Once your dashboard is set up with the desired gadgets, click on the "…" (more options) icon, usually located at the top right corner of the dashboard. • Select "Create Wallboard" from the dropdown menu. • Follow the on-screen instructions to set up the Wallboard. You may choose to keep the same gadgets as your dashboard or customize it further for wallboard display.
7. **Displaying the Wallboard:**	
	• Click on the "View as Wallboard" button, usually located at the top right corner of the dashboard. • (Optional) If you have a large screen or projector, display the Wallboard on it for your team to see.

Assessment:

- Were you able to create a new dashboard and add relevant gadgets for a Wallboard?
- Could you successfully create and display a Wallboard?
- Does the Wallboard provide a clear visual representation of key project metrics and status?

Reflection:

- Reflect on the benefits of having a Wallboard for team communication and project monitoring.
- Consider how a Wallboard can be utilized in daily stand-ups or other team meetings to foster transparency and awareness of project progress.