Lab: Configure a Classic Kanban Board

Estimated time: 25 minutes

In this lab, you will:

1. Move issues through a workflow.
2. View the default kanban workflow.
3. View the board's current column configuration.
4. Add a Review column to the board.
5. Verify that your Review column is working.
6. Configure board cards.

> Note: These instructions assume you have created a `projectA` classic kanban project with issues.

1: Move issues through a workflow.

1. Log into Jira (if necessary). https://[your site name].atlassian.net

2. Navigate to your `projectA` project. This is your classic kanban project. These instructions DO NOT APPLY to next-gen projects.

3. Click on the **Kanban board** tab in the contextual sidebar to view your board (if necessary, click the **Back to project** link first). This board was automatically created when you created the project and selected **Kanban** for the project template.

4. You should see three issues on the board from the previous classic kanban lab.

5. Drag and drop issues to new columns.

6. Click on an issue to open its details. Notice that the **Status** field value matches the name of the column on the board. **Change** the status value. **Close** the issue details and notice that your issue has changed columns on the board.

7. Again view an issue's details. Notice that the **Assignee** field is `Unassigned`. Click on the `Unassigned` value and select **Assign to me**. This lets the team know that you are responsible for working on the issue in this status. Close the issue details and notice that your user avatar appears with the issue on the board.

> Congratulations, you have moved issues through a workflow, both by dragging and dropping and by changing the issue's status field value.

2: View the default kanban workflow.

1. While viewing your `projectA` project, click on the **Project settings** tab in the contextual sidebar. Because this tab is under a project, the scope of these settings is limited to the project.

2. Click on the **Workflows** tab in the contextual sidebar to view the workflow(s) for your project.

3. You should see one workflow. Click on the (View as) **diagram** link to view the workflow. Notice

that the workflow contains the four default statuses of projects created with the kanban template. Also notice that when you create an issue, its status will automatically be set to `Backlog` (as indicated by the circle pointing to it). The `All` boxes means that all of the other statuses in the workflow can transition to this status.

4. Close the workflow diagram and navigate out of **Project settings**.

> Congratulations, you have viewed a diagram of the default kanban workflow.

3: View the board's current column configuration.

> Note: The set of columns on a kanban board are related to the workflow that your issues go through. To add a column with a new status, you must be a project administrator for the project.

1. View the kanban board for your project.
2. Click the **...** (more) button in the upper right and select **Board settings**. If this does not work for you, you may need to add yourself as a Project Administrator for the project:
    - With your project selected, click **Project settings**.
    - Select **People**.
    - Click **Add people** and add yourself (begin typing in your name) with a role of `Administrators`.
3. Click the **Columns** tab.
4. Notice that the four columns of the board are shown in the order that they appear on the board.
5. Below the horizontal bar in each column, you should see the workflow status name for the column. The color of the status name represents the category of the status. The `BACKLOG` and `SELECTED FOR DEVELOPMENT` statuses are gray, which means that issues with these statuses have a category of `To Do`. The `IN PROGRESS` status is blue, indicating that issues with this status have a category of `In Progress`. The `DONE` status is green, indicating that issues with this status have a category of `Done`.

> Congratulations, you have viewed the board's current configuration.

4: Add a `Review` column to the board.

1. Under the **Columns** tab of your board settings, verify that the **Add status** button is enabled. Even though we won't click this button directly in this lab, you need to have the permissions to add a status to the workflow. If the **Add status** button is not enabled, you need to add yourself as a project administrator for the project.
    - With your project selected, click **Project settings**.
    - Click **People**.
    - Click **Add people** and add yourself (type in your email address to find yourself) with a role of `Administrators`.
    - Navigate back to the board settings for your board and verify that the **Add status** button is now enabled.

2. Under the **Columns** tab of your board settings, click the **Add column** button.
3. In the **Add column** window, name the column `Review` and specify a category of `In Progress`. Click **Add** to add the column to the board.
4. You should now see the `Review` column before the `Done` column. Below the blue bar, you should see that Jira has created a `REVIEW` status for you, matching the name of your column. The text of the `REVIEW` status is blue, indicating that the category for the `REVIEW` status is `In Progress`. In the `REVIEW` status, the **Set resolution** checkbox should remain UNCHECKED. Checking this would set the issues `resolution` field to `Done`. We don't want to check this, because checking it would mean that issues in this status were resolved or closed.
5. Click the **Back to board** link in the upper right. You should see the `Review` column on your board.

> Congratulations, you have added a column to your board.

5: Verify that your `Review` column is working.

1. On your board, drag issues to the `Review` column.
2. View an issue's details and change the **Status** to and from a value of `Review`. The issue should move to the new column on the board.
3. From the board, open any issue. Click on the issue key in the upper left to navigate to its issue details under **Issues and filters**. Under **Workflow**, change the status of an issue to `Done`. Notice that its `Resolution` field is set to `Done`. Change the status to `Review`. Notice that its `Resolution` filed is `Unresolved`. This is because we didn't check the **Set resolution** checkbox when configuring the `Review` column.
4. Using the same procedure that you used earlier, view the workflow diagram under **Project settings**. You should see the `Review` status. You should also see that all other statuses are allowed to transition to `Review`. Jira added this status to the workflow when you added the `Review` column. The actual order of the statuses in this diagram does not matter, since all statuses are allowed to freely transition to other statuses. The order on a board is specified in board settings.
5. Navigate back to your board.

> Congratulations, you have verified that your `Review` column is working.

6: Configure board cards.

1. View a card on your board and identify all of the fields that are displayed.
2. Add the `created` field to the cards to display the date and time that the issue was created.
    - Under the **Card layout** tab of your board settings, add the `Created` field to the cards. Click the **Add** button.
3. View your board, you should see the created date on all cards.

4. Use the **Card colors** tab of board settings to show a vertical color bar for issues assigned to you. Change the `Colors based on` field to `Assignees to view the bar.

5. Undo the previous two changes to the cards on your board.

> Congratulations, you have configured board cards.