



Jira and Confluence Training Course: Boards, Workflows, JQL and Spaces



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Introduction:

Jira and Confluence training course on boards, workflows, JQL and spaces, held over 5 days for staff who run agile teams, own product backlogs, compile PMO reports or administer Atlassian tools, ending with a Jira and Confluence Team Configuration Pack for a case team. Many organisations let each team create its own projects, fields and workflows, so boards drift apart, reports disagree and documentation scatters across unlinked pages. Nominees already use Jira and Confluence daily and learn in hands-on labs on a training instance. CoreConcept Training Center delivers this Jira and Confluence training course.

Course Objectives:

- Configure Jira projects, issue types, custom fields and screens through the matching schemes for a delivery team
- Set up Scrum and Kanban boards with columns, swimlanes, quick filters and backlog settings that reflect how the team works
- Design Jira workflows with statuses, transitions, conditions, validators and post functions that enforce agreed hand-offs
- Write JQL queries and saved filters that feed boards, dashboards and burndown, velocity and cumulative flow reports
- Build automation rules, permission schemes and basic Jira Service Management request types, queues and SLA goals
- Organise Confluence spaces, page templates and knowledge base articles linked to Jira work for many teams

Target Audience:

- Staff who facilitate agile teams and keep Jira boards and sprints in order
 - Staff who own and order product backlogs, epics and releases in Jira
 - PMO staff who compile delivery status and portfolio reports from Jira data
 - Staff who administer Jira projects, schemes and Confluence spaces for several teams
 - Service desk leads who route and track internal requests through Jira Service Management
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Course Outline:

Day 1: Jira and Confluence Foundations and Current Set-Up Review

- Jira Software, Jira Service Management and Confluence Product Roles
- Jira Projects, Issue Types and Issue Hierarchy Walkthrough
- Company-Managed Versus Team-Managed Jira Project Selection
- Confluence Collaboration, Knowledge Base and Custom Space Types
- Current Jira and Confluence Instance Audit Checklist

Day 2: Jira Schemes, Board Configuration and Workflow Design

- Jira Custom Fields, Screens and Field Configuration Schemes
- Jira Scrum Board Columns, Swimlanes and Quick Filters
- Jira Kanban Board Column Constraints and Backlog Option
- Jira Workflow Statuses, Transitions and Resolution Settings
- Workflow Conditions, Validators and Post Functions Configuration

Day 3: Backlogs, Sprints, JQL Filters and Dashboards

- Jira Backlog Ordering with Epics, Versions and Components
- Jira Sprint Start, Scope Change and Sprint Completion Handling
- JQL Fields, Operators, Functions and ORDER BY Clauses
- Saved JQL Filters, Subscriptions and Filter Sharing Permissions
- Jira Dashboard Gadgets for Burndown, Velocity and Cumulative Flow

Day 4: Automation, Permissions, Service Desk and Multi-Team Hygiene

- Jira Automation Triggers, Conditions, Actions and Smart Values
- Jira Permission Schemes, Project Roles and Notification Schemes
- Jira Service Management Request Types, Queues and SLA Goals
- Confluence Page Templates, Jira Macros and Knowledge Base Articles
- Multi-Team Governance Naming Conventions and Scheme Sprawl Clean-Up

Day 5: Lab Capstone Configuring a Case Team in Jira and Confluence

- Jira Project and Issue Type Set-Up for a Case Team
 - Jira Workflow, Screens and Permission Scheme Build for the Case
 - Jira Board, JQL Filters and Dashboard Configuration for the Case
 - Confluence Space, Templates and Linked Jira Pages for the Case
 - Jira and Confluence Team Configuration Pack Completion and Walkthrough
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Skills You Will Gain:

- Jira Scheme Configuration
- Board Setup
- Workflow Design
- JQL Query Writing
- Dashboard and Report Building
- Jira Automation Rules
- Confluence Space Administration
- Tool Hygiene Auditing

Why Attend This Course:

- Hand the delivery lead and the tool owner a Jira and Confluence Team Configuration Pack for a case team, ready to adapt to a live team
- Choose between company-managed and team-managed projects and decide which scheme changes to approve or decline
- Prevent duplicated fields, orphaned statuses and broken dashboards that slow reporting and confuse teams sharing one site
- Share JQL filter libraries, workflow diagrams and Confluence page templates with colleagues across delivery teams

Conclusion:

Back at work, the participant hands the Jira and Confluence Team Configuration Pack to the delivery lead, the PMO and the tool owner who approves scheme changes. They use it to decide which workflow, board settings, permission scheme and Confluence space template a team adopts and which shared fields and filters feed portfolio dashboards. After the first two sprints on the new set-up, the unit should review board hygiene, JQL filter accuracy, automation rule audit logs and page usage, then retire unused fields, statuses and spaces.

Frequently Asked Questions FAQ:

What should participants know before the Jira and Confluence training course?

Participants should already create and update Jira issues and edit Confluence pages in daily work. No administration rights are needed; a training instance is provided, and an anonymised list of the current projects, boards and spaces helps them relate the labs to their own set-up.

How does Jira and Confluence training differ from an agile project management course?

This course configures the tools: schemes, boards, workflows, JQL, automation, permissions and spaces. Agile method courses teach Scrum events, estimation and flow theory and use any board; here method is touched only where a Jira or Confluence setting depends on it.

Why do Jira workflows and JQL filters matter when many teams share one Jira site?

Shared workflows and saved JQL filters keep statuses, fields and reports consistent across teams. Without them every team invents its own statuses, dashboards stop adding up and administrators spend time untangling duplicated schemes instead of supporting delivery.

What do participants take back from the Jira and Confluence training course?

Participants take back a Jira and Confluence Team Configuration Pack for a case team, covering project and issue types, workflow, board, JQL filters, dashboard, automation rules, permission scheme and a linked Confluence space, plus a hygiene checklist for reviewing their own site.