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Plugin Overview

Scorecard for JIRA helps managers to save time spent on the manual tasks associated with tracking and evaluating individuals. It provides a simple configuration of measures for assessing a range of roles including Developers, Testers and Designers.

Scorecard is easy to use and is a must-have extension for any team manager.

The **Scorecard** plugin allows you to:

- Schedule reports every Sprint, End of month, End of week, End of day.
- · Generate manual report whenever needed.
- Generate score based on the number of issues or on a sum/average of a specific field such as Time spent or Original Estimate.
- Configure banding to assign the score to each individual based on measure created.
- Generate reports based on multiple projects.
- · Create measures using filters or JQL
- Set targets using filters, JQL and Actuals.
- Track the performance of each individual in different roles.
- Give each individual the opportunity to see their own performance using the Scorecard gadget.
- View matching issues based on which score is calculated.
- Visualize all scores in a scorecard such as Overall score and each category score.
- Visualize a comparison of individual performance against the team performance.
- Categorize measures
- Assign individual users or user groups to a scorecard
- Use colors to highlight if the score improved or deteriorated from the last score.

The following documentation will outline how to set up a scorecard within JIRA.



Configuring Scorecard

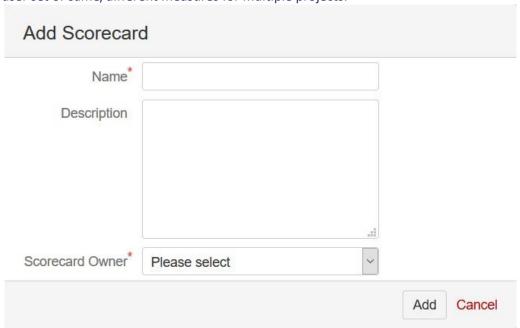
To Create, Manage and View scorecard as an administrator follow the steps below:

- 1. In the JIRA Administration, navigate to the "User Management" section;
- 2. Navigate to Manage Scorecards > Manage Scorecards > Scorecard Reports

In the Configuration Administration page, there are the following functionalities:

Step 1 - Add Scorecard:

This allows you to add a new scorecard. Multiple scorecards can be created with same/different user set or same/different measures for multiple projects.



"Name" and "Scorecard Owner" are mandatory fields for creating a scorecard. Once a user clicks on "Add", the scorecard is created and added to the list of scorecards and a list of actions are displayed which can be performed on the scorecard.

Project Team 1	Manage Members	Edit	Schedule	Manual	Delete	Сору	
Owner: ashish.agrawal							

Step 2 - Manage Members:

This allows you to associate members with the scorecard.

Project Team 1 Manage Members Edit Schedule Manual Delete Copy
Owner: ashish.agrawal



Under Manage Members, users can add individual members or user groups.

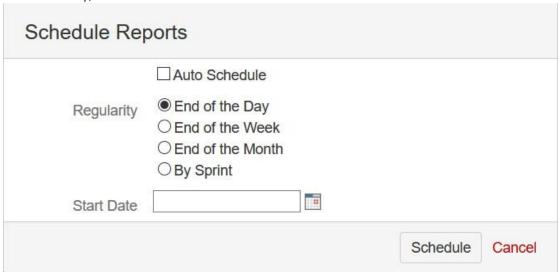


Step 3 - Edit:

Under Edit you can perform a number of steps like Edit scorecard name, Add/Edit/Delete new category, Add/Edit/Delete new measures - which is covered in "Setting up a Scorecard".

Step 4 - Scheduling a Report:

This allows you to schedule a report. By default, when a scorecard is created it is set to "Manual" but it can be changed by clicking on "Schedule" link which gives you various options like End of Day, End of Week etc.



Clicking on "Auto Schedule" and selecting a "Regularity" generates reports automatically based on selection –

- a) End of Day: Generates daily report every day at midnight based on selected Start Date.
- End of Week:- Generates weekly report at the end of a week based on selected Start Date

 i.e. if start date was 24th May 2018 which is a Thursday then a report would be generated on the midnight of 30th May 2018.
- c) End of Month: Generates monthly report at the end of every month at midnight.



d) By Sprint: - Selecting "By Sprint" gives you the option to select a sprint board based on which a sprint report is generated as each sprint ends.

Step 5 - Delete:

This allows you to delete a scorecard. Performing this action will delete the scorecard and all reports related to it.

Step 6 - Copy:

This allows you to copy a scorecard, which includes its members and measures created.

Setting up a Scorecard

While the rest of the documentation explains each part of the plugin individually, the following section is the step by step process required to set up a **Scorecard** successfully.

Step 1 – Adding a Scorecard

To evaluate individuals and then teams, you need to define a measure and create a scorecard.

The Scorecard can be created within the JIRA Administration as follows:

- a) Log in as a user with Administrator permissions to the JIRA installation;
- b) Navigate to the Jira Administration & Select the "User Management" section;

Under "User Management Administration" in the "Manage Scorecards" menu, click "Manage Scorecards".

From the Scorecard Browser, you can add new scorecards.

Step 2 – Assigning members to a scorecard

Once a scorecard has been created, the next step is to assign members to a scorecard. Under Manage Members, users can add individual members or user groups. A scorecards report will generate only for the members under the Manage member section.

Steps to Add/Assign members as follows:

- a) In manage members, while adding individual members, click on "Edit Users" and add single/multiple members using user selector.
- b) While adding the user group, click on "Edit Groups" and add single/multiple groups.
- c) For removing member/group, check the member/group and remove it by clicking on "Remove" button.



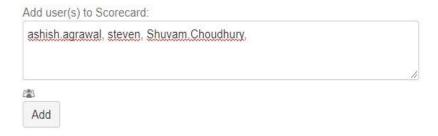


Figure. Add Users

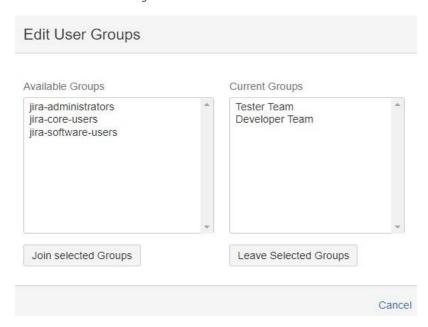


Figure. Add Groups

Step 3 – Edit Scorecard

In Edit, you can perform a number of steps like Edit Scorecard details, Add/Edit/Delete new categories, Add/Edit/Delete new measures.

1. Edit Scorecard

Edit Scorecard allows you to edit Scorecard Name, Scorecard Description and Scorecard Owner.



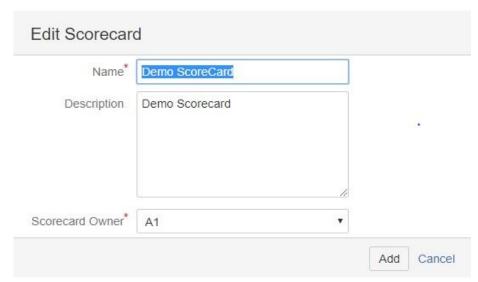


Figure. Edit Scorecard

2. Add/Edit/Delete Category

In each scorecard, users can create any number of categories of as per the requirement (e.g. Could be on the basis of role)

a. Add Category - Clicking on "Add Category" button loads dialog where the user has to add category name and description.

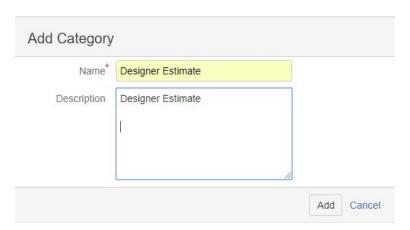


Figure. Add Category

b. Edit - In edit Category, the user can edit Category Name and Description.



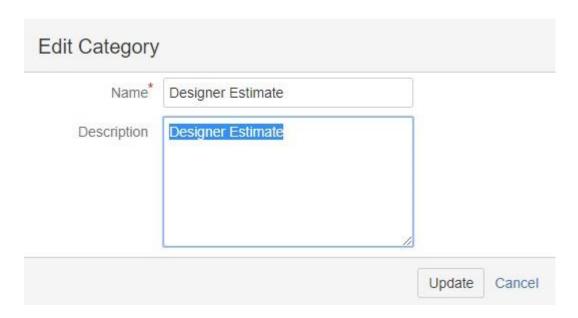


Figure. Edit Category

c. Delete - In Delete Category, the user can delete any required category. Clicking on "Delete" button will give you confirmation popup to delete a category.

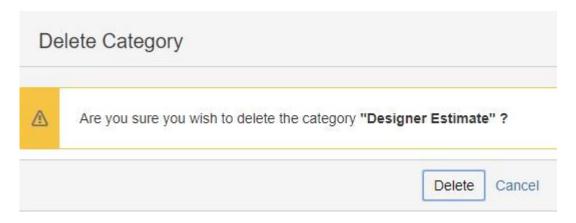


Figure. Delete Category

3. Add/Edit/Delete Measure

a. Add Measure – Under each category, the user can add n number of measures as per requirement (e.g. Estimates Accuracy, % of work completed).



 Details – In details section, users have to add Measure Name, Description and choose a category.



Figure. Measure Details

- Actual Score To generate a score for each member in a scorecard, the user can
 choose either from JQL or from the saved filter to return a list of issues based on
 which score calculation method would be applied. JQL can be simple or complex
 depending on user requirements. If the requirement is to know how many tasks did
 a user complete in a project? Below is an example of JQL which would be used.
- From JQL To get issue count you can choose "From JQL" option, which will have a textbox where the user can enter any desired JQL.

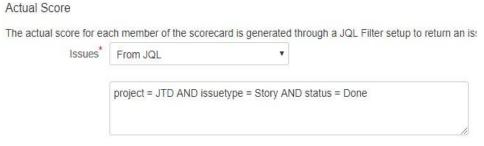
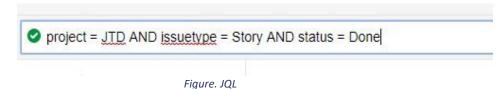


Figure. Add JQL

JQL stands for Jira Query Language and is the most powerful and flexible-way to search your issues in Jira. JQL is for everyone: developers, testers, agile project members. JQL can be simple or complex depending on user requirements. (For example - project = ProjectName AND issuetype = Story AND status = Done).





There are 3 JQL functions which can only be used by the reports when they are included in JQL strings or filters in the measures.

ReportStart JQL Function – This function will use the start date if the report is generated as the search criteria.

ReportEnd JQL Function - This function will use the end date if the report is generated as the search criteria.

ReportSprint JQL Function – This function will use the sprint id if the report is generated as the search criteria.

☐ From filters - To get issue count you can choose "From Existing filter" option. There is "View all filter" link so that you can view all the filters in your Jira.



Figure. Select Filter

JIRA's powerful issue search functionality is enhanced by the ability to save searches, called filter in JIRA. Define and run your search as described in searching for Issues. Click the "Save as" button above the search results. The "Save Filter" dialog is displayed. Your new filter is added to your favorite filter.



Figure. Save Filter



The "Manage Filters" page allows you to view and configure filters that you have created, as well as work with filters that other users have shared with you. You can access this page by selecting "Find filters" or through the **Issues > Manage Filters** menu option.

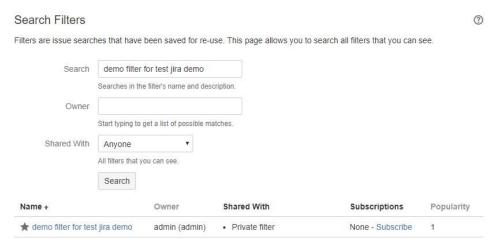


Figure. Search Filter

Calculation Type – You can choose any calculation type like Issue Count(# of Issue)
or Sum Of Issues/Summary(Field Value) or Average Issue Score(Avg. Field Value).

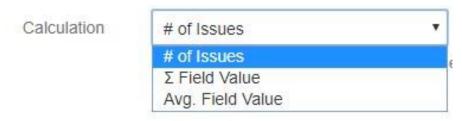


Figure. Calculation Type

Field value - If user will choose "Sum of Issues/Summary (Field Value)", then there is next drop-down populates of "Field Values" (Ex. Original Estimate, Remaining Estimate, Time spent) and if (Role-based Estimation Plugin) is Installed there is another drop-down of role populates next to "field value" dropdown. The same thing happens if user chooses "Issue score (Avg. Field Value)".



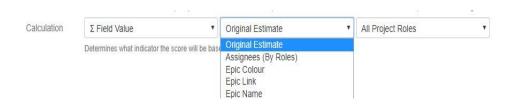


Figure. Field value calculation type with a dropdown of field value and role.

- Banding Method Select the method that you want to use to position a score in a band.
 - I. User can choose "Actual" as the target method, in case where the result is also in the form of actual score such as Work Ratio.
 - II. The user wants to select "Actual/Target%" method, in the case actual score needs to be compared to another score. This can be achieved in 2 ways
 - a) The user needs to create "Target score" same like the Actual score. The target score is the value that each user's actual score will be measured against.

The value can be dynamically generated by the report based on a JQL or Filter.

b) The second option is "Specified" and where the user can enter a value manually as a target.



Figure. Enter Specified Value

 Thresholds - To generate a score based on the actual and target results the report requires bands to be created. A band is a range of values (threshold) that specifies how good or bad the comparison value of the actual score & target score is.

By selecting, which threshold is the best result the system will then calculate a score for the user based on where their actual/target percentage falls.



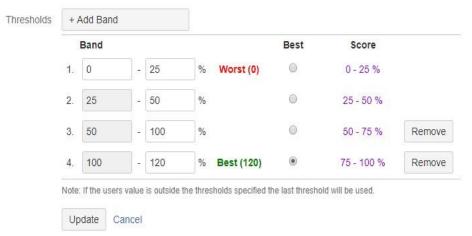


Figure. The range of values (threshold)

- b. Edit In Edit Measure, the user can edit all fields.
- c. Delete In Delete Measure, the user can delete any Measure, which he/she wants. Clicking on "Delete" button will give the confirmation popup to delete a Measure.

Step 4 – Scheduling a Report

This allows you to schedule a report. By Default, when a scorecard is created it is scheduled to Manual but it can be changed by clicking on "Schedule" link which will give you various options like 'By End of Day', 'By End of Week', 'By End of Month' and 'By Sprint' etc.

Clicking on "Auto Schedule" and "Regularity" would generate reports automatically based on selection -

a) End of Day - Generates daily report every day at midnight (11.55pm) based on selected Start Date (Ex. If you select date 12th May 2018 it will generate at 11.55pm on that day).



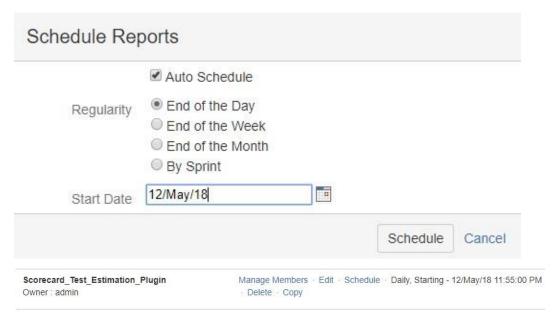


Figure. Schedule by End of Day

b) End of Week - Generates weekly report at the end of a week based on selected Start Date i.e. if start date was 24th May 2018 which is a Thursday then a report will be generated on the midnight(11.55pm) of 30th May 2018.

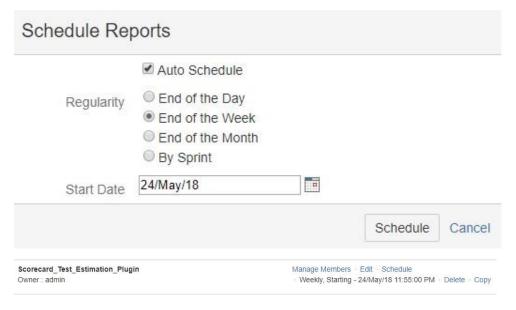


Figure. Schedule by End of Week

c) End of Month: - Generates monthly report at the end of every month at midnight (If start date was any date of the month a report will be generated on the last date of the month at 11.55pm).



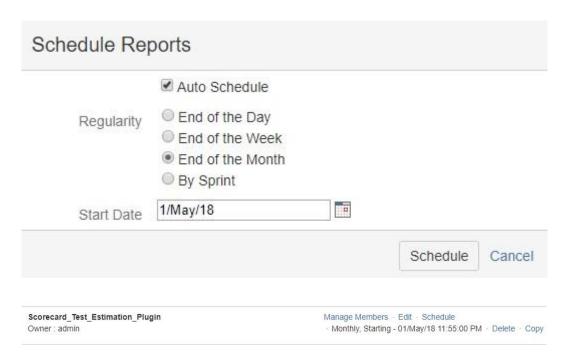


Figure. Schedule by End of Month

d) By Sprint: - Selecting "By Sprint" gives you the option to select a sprint board based on which sprint report is generated as each sprint ends.

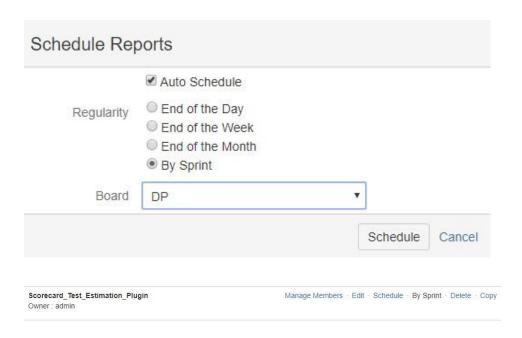


Figure. Schedule by Sprint



Report Generation

How report scores are calculated

Step 1 - Objective KPI

Key performance indicators (KPIs) are visual measures of performance. Based on a specific calculated field, a KPI is designed to help users quickly evaluate the current value and status of a metric against a defined target.

• Step 2 - Calculate the raw scores

Row score is calculated based on actual value and the target value.

Step 3 - Locate the threshold boundaries and bands that contain the raw scores

A band is a range of values between two endpoints called Thresholds. When a KPI score falls between two threshold values, the plugin can identify the associated band.

• Step 4 - Convert the threshold values

For each KPI, the plugin calculates a threshold factor for conversion. This factor is the length of the band that contains the KPI raw scores, multiplied times the number of bands in the scenario.

Step 5 - Convert individual KPI scores

To convert individual KPI scores to the common scale, first calculate how far the raw score is from its lower threshold. Then, divide that length by the associated threshold factor. Finally, convert the result from a percent value to a decimal value.

Step 6 - Adjust the location

The next step determines how much to adjust the converted score so that it is in the correct position relative to the lowest possible value (the Worst value). To determine the amount of adjustment that is required, first determine how many bands separate the raw score from the original Worst value. Then, divide that value by the total number of bands.

• Step 7 - Calculate the normalized scores

The final step calculates the normalized scores. The normalized score is the sum of the converted raw score and the band adjustment amount, divided by the number of bands.

Scorecard List

The Scorecard Reports page allows you to create new reports & view the past scorecard results.



Scorecard List

Scorecard	Reports	Operations
Demo ScoreCard	Demo ScoreCard Report 1st	View - Generate Report
ScoreCard 2	ScoreCard 2 Report 2nd	View · Scheduled Daily
ScoreCard 3	ScoreCard 3 Report 3rd	View · Scheduled By Sprint
	 ScoreCard 3 Report 2nd 	
	 ScoreCard 3 Report 2nd 	
ScoreCard 4	ScoreCard 4 Report 2nd	View - Scheduled Monthly
	 ScoreCard 4 Report 1st 	

Figure. Create new reports & view the past scorecard results

The following sections appear on this page –

- a) Scorecard This is Scorecard list (Scorecard label) section.
- b) Reports This section includes a list of reports where each report label works as a link to navigate to "report View" page. The detailed of "View Report" page is under a different section "View Report Details".
- c) Operations This section includes "View" link, by clicking on this it would navigate to a page, which lists the current report for the selected scorecard and "Generate Report" link, which is used to generate a new report for the scorecard.
 - 1. View If you click on view, it will navigate to the page, which lists the current report for the selected scorecard. It gives the details of a report such as report label, report start and end date, user count for which report generated, report average score ad operation sections where the user can view the report or delete the report. You can generate the report from this page as well. There is "Generate Report" button on top of the right.

Report	Start Date	End Date	No. of Users	Avg. Result (%)	Operations
ScoreCard 2 Report 2nd	16/Mar/18	18/Mar/18	2	75.0	View - Delete

Figure. List of current reports for the selected scorecard

Delete Report – This allows you to delete a report.

2. Generate Report – If you click on generate the report it will appear with dialog/popup of "Generate Report" in which you need to add report label, start and end date of the report. Clicking on Generate Report button would generate the report.

If you schedule a report, it will only show text like "Scheduled by Sprint" or "Scheduled Daily" or "Scheduled Weekly" or "Scheduled Monthly" instead of "Generate Report" link.



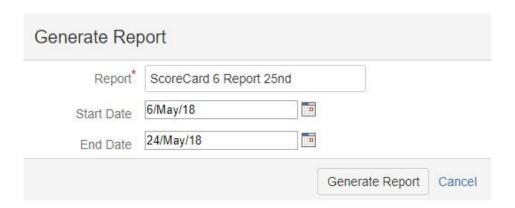


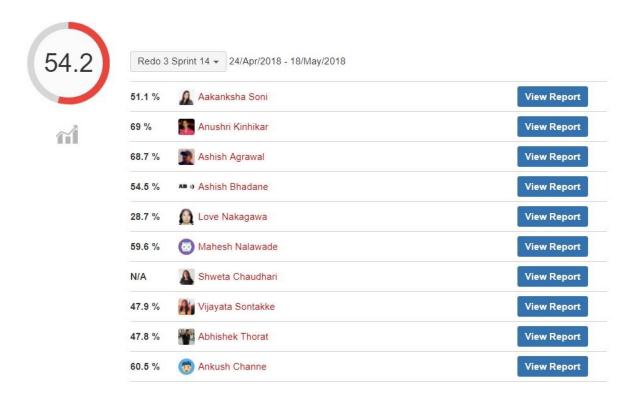
Figure. Generate Report



View Report Details

In this page, current report details are present along with the all previous reports for the selected scorecard.

Current Report



All Reports



Figure. View Report



a) Current Report – In the current report, you will be able to see the Current Report Score with each user's overall score and for each user, there is button "View Report" that navigates to the page of user details. The user details are shown under the "View User Details" section. There is a dropdown list of reports for currently selected scorecards above users list with start and end of the report and there is chart icon if you click on that icon it would be showing the graphical report for scorecard and user as well.

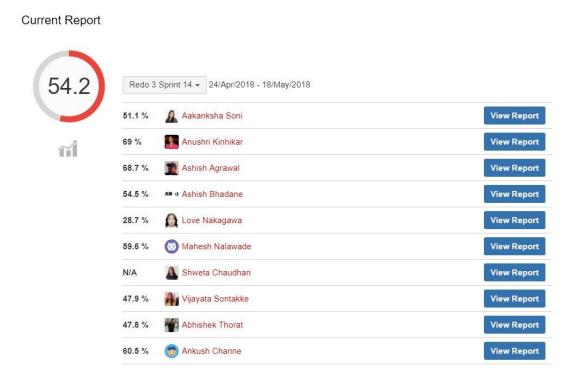


Figure. Current Report

b) Graphical Report -

This graphical report is google chart report which has X-axis (Report) that shows report date and Y-axis (Score) that shows the report score 0-100 with range gap of 25. There is a popup (tooltip) appears with start Date and score of the Report.

Graphical report for users is same as scorecard report. The only difference is that it shows individual user's score in red and all user's score in blue. If you click on any plotting point it will show popup with report Title, Start Date, End Date and User Score.



Ashish test - React Team 3 - Past Performance

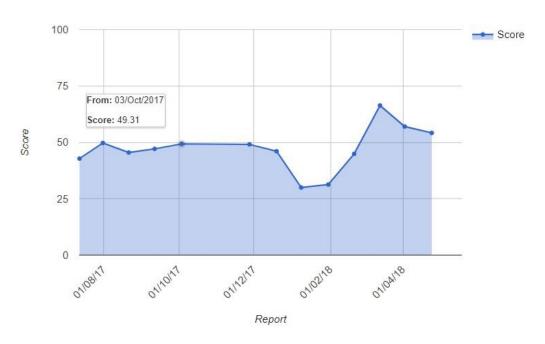


Figure. Graphical Report of Scorecard

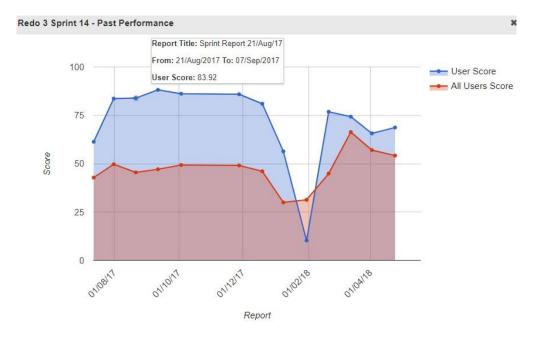


Figure. Graphical Report of User



View User Details

In this page, you will be able to see the selected user details with Scorecard categories and Measures with details under each category. There are three dropdowns of scorecards, reports, and users at the top, so you can choose the ones that you want to show.

There is toggle button with each category details for the user that shows the Measure details Like Measure Name, Measure Description, Actual Filter Value and Target Filter Value. For Example, in the below figure, the user "Anushri" has a category with name "Bugs" and measure with name "# Bug Fixed" with details. The measure name works as a link and navigates to "View Measure Details" page. The details of this page are shown in the next section "Measure Details".

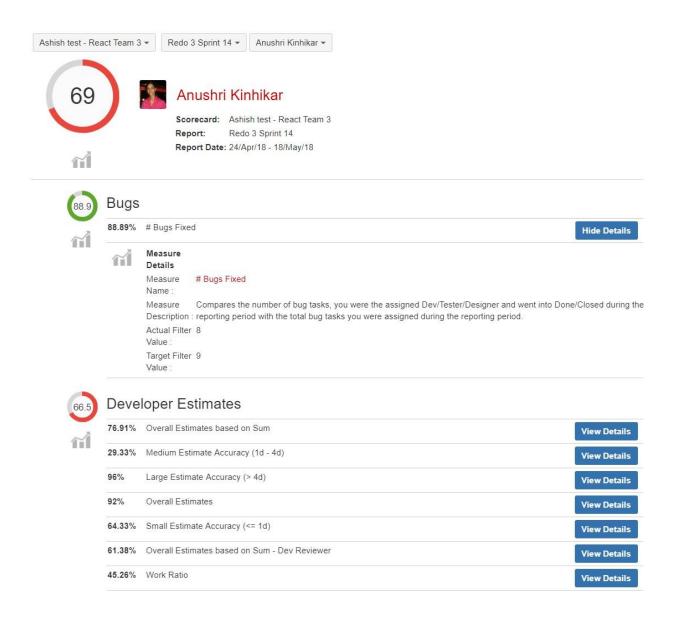




Figure. Individual user details

View Measure Details

In the measure details page, you can able see to the details of measure you have filled while adding measure. There are four sections that are as follows –

- a) Details In this section there is the name of measure's category, measure name works as a link that navigates to the measure add/update page. You can update/edit the measure details and description.
- b) Actual Score Calculation Method This section shows the selected JQL/Filter from which you will get "No. of issues".
 - The JQL appears as a link which navigates to page the from where you can access the JQL and there is a link "View Matching Issues" that gives the list of all the issues get from JQL/Issue Filter.
 - The Calculation will show the selected calculation type from # of Issue/Field Value/Avg. Field Value.
- c) Target Score Calculation This section will be showing same information like actual score calculation method.
- d) Band Table This section is showing the selected range of band values that specifies how good or bad the comparison value of the actual score & target score is.



Measure Details

Details

Category: Bugs

Measure # Bugs Fixed Name:

Measure

Compares the number of bug tasks, you were the assigned Dev/Tester/Designer and went into Done/Closed

Description during the reporting period with the total bug tasks you were assigned during the reporting period.

Actual Score Calculation Method

Issues:

/issues/?jql=issuetype = Bug-task AND status in (Closed, Done) and (Assignees = From

assignedRole("Developer",anushri.kinhikar) OR Assignees = assignedRole("Designer") OR Assignees = JQL:

assignedRole("Tester")) AND sprint = reportSprint(444) AND project = REDOIII

View Matching Issues

Calculation:

of Issues

Target Score Calculation Method

Actual / Target %

Issues:

/issues/?jql=issuetype = Bug-task AND (Assignees = assignedRole("Developer",anushri.kinhikar) OR Assignees = From assignedRole("Designer") OR Assignees = assignedRole("Tester")) AND sprint = reportSprint(444) AND project = REDOIII

View Matching Issues

Calculation

of Issues

Band Table

Band	Best	Score	
0 - 25	(Worst)	0 - 25 %	
25 - 50		25 - 50 %	
50 - 75		50 - 75 %	
75 - 100	(Best)	75 - 100 %	

Figure. Measure Details



Scorecard Gadget

JIRA dashboards contain gadgets. The gadget is an information-box in which user can see information about projects and issues, Info related plugins/Add-on that is relevant for the user. Technically gadgets are XML files that wrap around an HTML, CSS, and JavaScript content.

In our scenario, the gadget will give you the report status of the current user. First, configure the gadget by choosing the scorecard from the dropdown list(for current user only) and it will return the details including overall score and latest report for the selected scorecard. Follow the steps given below for the gadget configuration.

Gadget Configuration

Step 1 -

You will need Scorecard plugin with proper reports of the current user for gadget configuration.

Step 2 -

Add the gadget on the dashboard from "Add Gadget" option on the dashboard configuration. You can find the gadget with the name "Scorecard Reports" under "JIRA" category.

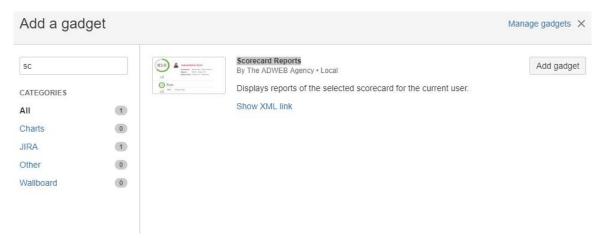


Figure. Add Gadget

Step 3 -

This gadget has to be configured, where you have selected a scorecard (for current user only) from the dropdown list, which returns the "overall score" of that scorecard(by calculating all reports score in that scorecard) along with "latest report'.



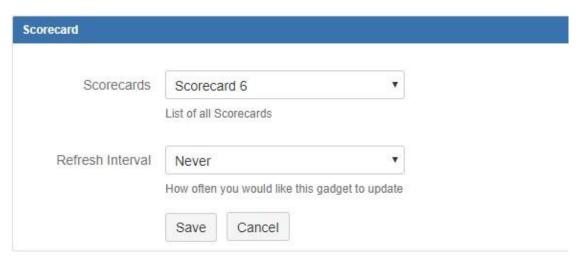


Figure. Configure Gadget

Scorecard

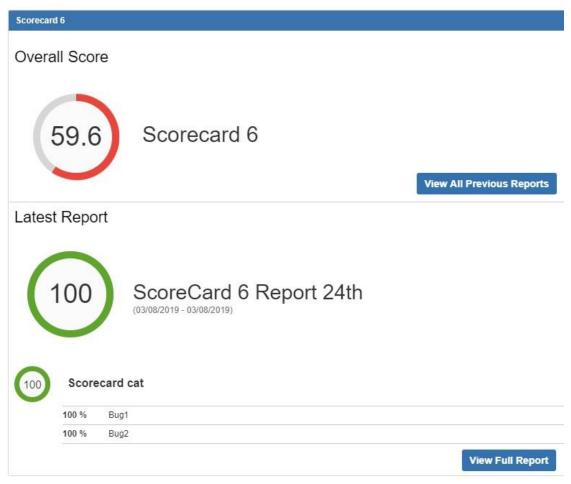


Figure. Details (Latest report and Overall score) of Selected Scorecard



"View All Previous Reports" button in the first section(i.e. Overall score for scorecard) navigates to All Reports page where you will able to get a list of all the reports of a current user for the selected scorecard.

The "report name" (Ex. Scorecard 6 Report 24th) works as a link which navigates to the individual report page and same page will access from button "View Full Report" in the second section (Latest Report details) of gadget page.

Sco	orecard 6		
All R	eports		
	100	ScoreCard 6 Report 24th	(03/Aug/2019 - 03/Aug/2019)
	100	ScoreCard 6 Report 23rd	(29/Jul/2019 - 29/Jul/2019)
	100	ScoreCard 6 Report 22nd	(28/Jul/2019 - 28/Jul/2019)
	90.6	JTD Sprint 40	(28/May/2018 - 27/Jul/2019)
	90	JTD Sprint 41	(28/May/2018 - 27/Jul/2019)
	51.8	ScoreCard 6 Report 21st	(26/Apr/2018 - 26/Apr/2018)
	100	ScoreCard 6 Report 19th	(24/Apr/2018 - 24/Apr/2018)
	50	ScoreCard 6 Report 18th	(23/Apr/2018 - 23/Apr/2018)
	50	ScoreCard 6 Report 17th	(22/Apr/2018 - 22/Apr/2018)
	50	ScoreCard 6 Report 16th	(21/Apr/2018 - 21/Apr/2018)
	87.5	ScoreCard 6 Report 15th	(20/Apr/2018 - 20/Apr/2018)
	87.5	ScoreCard 6 Report 14th	(19/Apr/2018 - 19/Apr/2018)



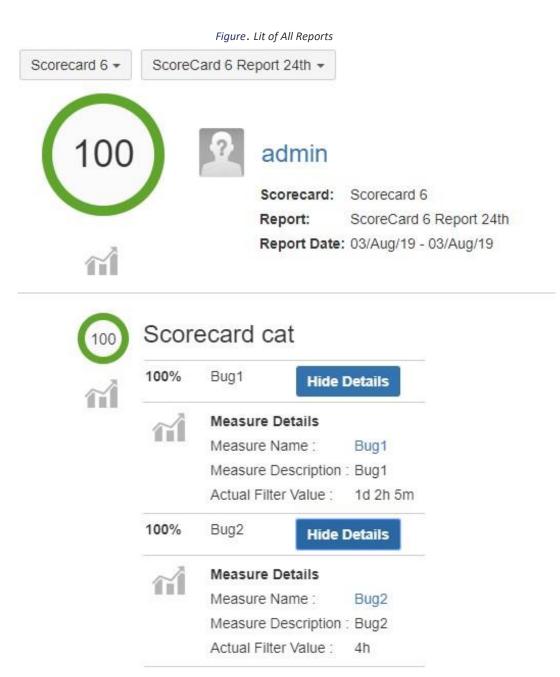


Figure. Individual Report Details



For any other enquiries please contact our support team at jirasupport@adwebsoftware.com