

# University of California JIRA User Group(JUG)

Hosted by:

UCOP Institutional Research & Academic Planning  
4-6-18

# Agenda

- Welcome & Introductions
- Demonstration of JIRA usage in UCSC – Brian  
Duisenberg
- Q & A
- Next Meeting

UC SANTA CRUZ

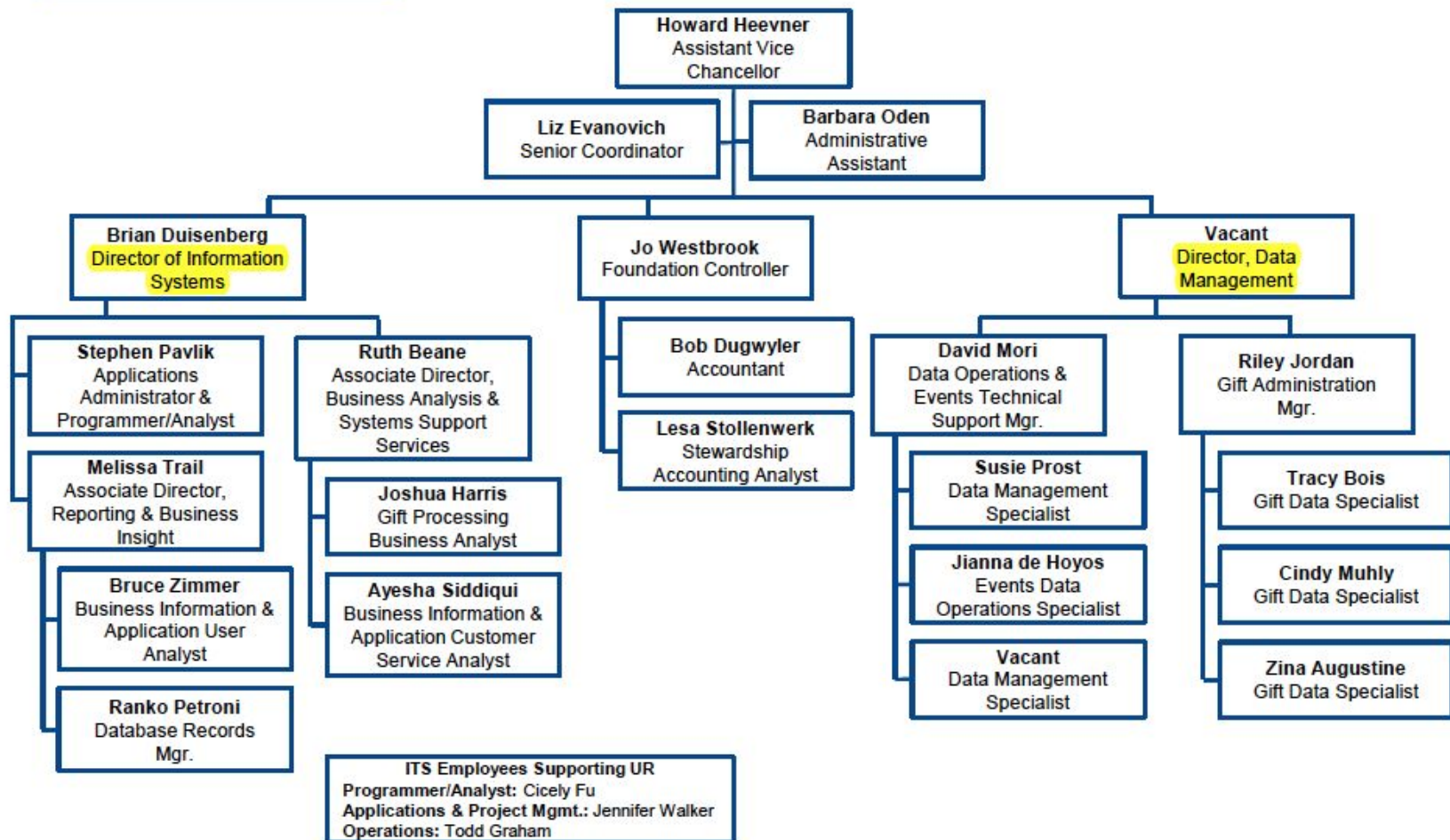
# University Relations (UR) JIRA & JIRA Service Desk

UC JUG Meeting – April 6, 2018



# Advancement Services

JIRA and JIRA Service Desk Users



# UC Santa Cruz JIRA Environment - Use Cases

## Service Desk

End User Support & Advancement Services Requests

- Tech support
- Ad hoc reports
- Constituent record bio-data updates
- Gift processing questions

## JIRA - URIS Internal

Software development projects, requirements tracking, and UR Information Systems (URIS) small project work (e.g. reports requiring changes to database or modifications to existing functionality or corporate reports)

## JIRA - Departments

Some departments outside of Advancement Services use JIRA to support tracking email inquiries.

- Donor Stewardship
- Prospect Research Requests (coming soon).

# Demonstration Service Desk Implementation

## Why we moved to Service Desk:

We moved from JIRA to Service Desk because end-users had to have full JIRA user accounts and the pricing was becoming too expensive (~500+ users).

Service Desk users are customer accounts and do not require a license.

The screenshot shows the 'UR Help Desk' interface for the University of California Santa Cruz. The page has a dark blue header with the university logo and a search icon. Below the header is an orange navigation bar with the text 'UR Help Desk' and an 'Add announcement' button. The main content area is white and contains a welcome message: 'Welcome! Search for the type of request by typing a keyword in the search bar below (codes, training, etc.) or select a request type on the left (e.g. select/click "Request a List or a Report"). For general information and training check out the [UR Toolkit](#) .

On the left side, there is a vertical menu with the following items: 'Questions & Support', 'Access & Training', 'Request a List or a Report', 'Codes', 'BioData Updates', 'General Requests', 'Events', and 'Gift Admin'. On the right side, there are three main sections: 'Report an issue' (with a blue 'X' icon), 'Get help with Banner/InfoView/Reeher' (with a blue question mark icon), and 'Training' (with a blue icon of a person at a computer).

# Demonstration JIRA Use Cases

- Service Desk (ticket view)
- URIS Internal Tech Tickets
- Stewardship/Donor Relations

The screenshot displays the Jira issue tracking interface. The top navigation bar includes 'Dashboards', 'Projects', 'Issues', 'Boards', and 'Create'. A search bar is visible on the right. The left sidebar contains filters such as 'My open issues', 'Reported by me', 'All issues', 'Open issues', 'Done issues', 'Viewed recently', 'Created recently', 'Resolved recently', and 'Updated recently'. The main content area shows a search for 'URIS' with filters for 'Type: All', 'Open', and 'Assignee: All'. The search results are displayed in a table with columns for Key, Summary, Assignee, Reporter, P (Priority), Status, Resolution, Created, Updated, and Due. The table lists 10 tickets, with the first one highlighted. The first ticket is URIS-19975, titled 'Career Tracks Pay Code & Industry Standard Occupation Codes Loaded to ATVJOBG', assigned to Ayesha, reported by Ruth Beane, and is in an 'OPEN' status with a resolution of 'Unresolved'.

Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due
URIS-19975	Career Tracks Pay Code & Industry Standard Occupation Codes Loaded to ATVJOBG	Ayesha	Ruth Beane	↑	OPEN	Unresolved	22/Feb/17	08/Feb/18	
URIS-18269	Harris Data Confirmation -Due April 25 --Univ. of California, Santa Cruz CDC and TABS reports 4-21-16	Ranko Petroni	Brian Duisenberg	↑	OPEN	Unresolved	21/Apr/16	22/Apr/16	22/Apr/16
URIS-20793	Request a Mail or Email List Successfully Submitted121	Jianna DeHoyos	Joni@ucsc.edu	↑	OPEN	Unresolved	04/Apr/18	04/Apr/18	
URIS-20792	Alumni information	Unassigned	Ayesha	↑	OPEN	Unresolved	03/Apr/18	03/Apr/18	
URIS-20791	iMods event admin	Unassigned	David Mori	↑	OPEN	Unresolved	03/Apr/18	03/Apr/18	
URIS-20790	Gift Form needs to be updated on toolkit	Unassigned	Riley Jordan	↑	OPEN	Unresolved	03/Apr/18	03/Apr/18	
URIS-20789	Request a Mail or Email List Successfully Submitted120	Unassigned	Ayesha	↑	OPEN	Unresolved	02/Apr/18	02/Apr/18	
URIS-20788	Request a Mail or Email List Successfully Submitted119	Unassigned	Diane Syrcle	↑	OPEN	Unresolved	26/Mar/18	27/Mar/18	
URIS-20787	Request a Mail or Email List Successfully Submitted118	Jianna DeHoyos	Diane Syrcle	↑	OPEN	Unresolved	26/Mar/18	03/Apr/18	
URIS-20785	Community Funded - International Address issues	Unassigned	Brian Duisenberg	↑	OPEN	Unresolved	20/Mar/18	21/Mar/18	
URIS-20783	Remove Banner ADFS Access for Matthew Zeller ASAP.	Unassigned	Brian Duisenberg	↑	OPEN	Unresolved	16/Mar/18	16/Mar/18	
URIS-20779	URIS-20774 / All-UC President's Reception in Washington DC on June 19th (all email alumni in DC area)	Bruce Zimmer	Ranko Petroni	↑	OPEN	Unresolved	14/Mar/18	14/Mar/18	11/May/18
URIS-20778	URIS-20774 / UCOP Mapping Data Request	Bruce Zimmer	Ranko Petroni	↑	OPEN	Unresolved	14/Mar/18	14/Mar/18	01/May/18
URIS-20777	URIS-20774 / UCOP Alumni Perception/Affinity Survey - early summer	Melissa Trail-Grimes	Ranko Petroni	↑	OPEN	Unresolved	14/Mar/18	14/Mar/18	25/Apr/18
URIS-20774	UCOP Alumni data requests for remainder of FY17-18 (5 requests)	Ranko Petroni	Brian Duisenberg	↑	OPEN	Unresolved	14/Mar/18	15/Mar/18	
URIS-20773	URIS-20741 / 2018 Giving Day files with PIDMs and bio data indicators for <=\$499 gifts	Joshua Harris	Ranko Petroni	↑	OPEN	Unresolved	13/Mar/18	13/Mar/18	
URIS-20772	URIS-20741 / Create the constituents who gave a <=\$499 gift and are not in Banner	David Mori	Ranko Petroni	↑	OPEN	Unresolved	12/Mar/18	12/Mar/18	

# Service Desk/JIRA Features To be Implemented

## SLA

### **Service Level Management**

- \* Refine workflows to support different SLAs based on request type.
- \* Implement SLA escalation notifications.

## Confluence

### **Knowledge Base**

- \* Move support documentation to Confluence from current support google site.
- \* Publish common ticket requests and resolutions.

## Bitbucket

### **Version Control**

Bitbucket is a free service for non-profits (up to 5 users). Will use this to store report coding and data interface coding.





Q&A