



**Office of the President  
Institutional Research and  
Academic Planning (IRAP)**

JIRA User Guide

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## 1. INTRODUCTION

The Institutional Research and Academic Planning (IRAP) team has implemented Atlassian JIRA as an asset collection and requirements gathering/repository tool.

This guide highlights the current usage of the tool by IRAP. It is anticipated that the document will be helpful in getting new users started within the department.

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### 1.1. DOCUMENT SCOPE

This document will cover the following from an IRAP usage perspective:

- An introduction to JIRA Cloud and its features
- Project categories and projects
- IRAP Jira Roles
- Issues
- Assets
- Workflows
- Statuses
- Comments
- Watchers

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## 2. INTRODUCTION TO JIRA

### 2.1. WHAT IS JIRA

JIRA is a tool developed by Australian company, Atlassian. It is mainly used for bug tracking, issue tracking and project management. The name “JIRA” is actually inherited from the Japanese word, “Gojira” which means “Godzilla”. IRAP has a web-based and cloud-based implementation.

While JIRA has been developed primarily as an issue and project tracker out of the box, IRAP is using this tool for requirements management.

Jira is based on the agile software development methodology.

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### 2.2. BENEFITS OF JIRA

The following are some benefits of using Jira:

- I. End to end requirements tracking
- II. Improved project management with better organization and visibility
- III. Change request and data issue management
- IV. Improved testing and validation

- V. Improved team collaboration and productivity
- VI. Improved quality of work.
- VII. Reduced need for issue tracking using emails and spreadsheets
- VIII. Powerful search functionality
- IX. Ability to implement customizable workflows that are business process driven and project specific

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## 2.3. BASIC JIRA CONCEPTS

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### 2.3.1. PROJECT CATEGORIES

There are a number of project categories currently configured in JIRA to allow the categorization and organization of IRAP data projects.

If you need a new project category configured, contact the site administrators listed in section 2.3.3.4:

#	Category Name	Category Description
1	Change Requests	Category to manage change requests
2	Data Issue Management	Category to tracking data issues by subject area
3	Data Mart Requirements	Category for data mart development projects
4	Document Management	Category created to manage document assets
5	Application Services Requirements Management	Category created to manage projects involving web/application development
6	BI Audit Program Management	Category created to manage projects involving ongoing audit of analyses and reporting data
7	Known Issues Management	Category created to manage data known issues
8	Partnership Data Extract Management	Category created to manage data exchanges with other segments
9	Reference Data Management	Category created to manage reference data that cuts across multiple subject areas
10	Star Schema Requirements Management	Category created to manage star schema requirements
11	UAT Framework Requirements Management	Category created to manage user acceptance testing validation requirements

Table 1: IRAP Project Categories

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### 2.3.2. PROJECTS

A project is a collection of issues. Below is some of the project requirements stored in Jira by project category:

#	Category Name	Projects
1	Change Requests	UC Data Warehouse Change Requests
2	Data Issue Management	Contracts and Grants Data Issues
		Course Enrollment Data Issues
		Degree Data Issues
		Graduate Admissions Data Issues

#	Category Name	Projects
2	Data Issue Management (Continued)	Student Enrollment Data Issues
		Student Financial Support Data Issues
		Summer Student Enrollment Data Issues
		Undergraduate Admissions Data Issues
3	Data Mart Requirements	Contracts and Grants Data Mart Requirements
		Degree Data Mart
		Graduate Admissions Data Mart
		Graduate Longitudinal Data Mart (GLONG)
		Student Enrollment Data Mart
		Student Graduate Financial Support Data Mart
		Student Undergraduate Financial Support Data Mart
		UC Alumni Data Mart
		UC Spend Data Mart
		Undergraduate Admissions Data Mart
		Undergraduate Longitudinal Data Mart (ULONG)
University Student Aid Program (USAP) File		
4	Document Management	IRAP Code Library
5	Application Services Requirements Management	Cognos User Registration
		Data Control Load Application
		Qualtrics and Single-Sign-On (SSO)
		Tableau User Registration
		UCDW Online Data Dictionary and Business Glossary
6	BI Audit Program Management	Contracts and Grants Test Cases [BI Audit]
		Course Enrollment Test Cases [BI Audit]
		Degree Test Cases [BI Audit]
		Graduate Admissions [BI Audit]
		Student Enrollment Test Cases [BI Audit]
		Student Financial Support Test Cases [BI Audit]
		Summer Student Enrollment Test Cases [BI Audit]
		Undergraduate Admissions Test Cases [BI Audit]
7	Known Issues Management	UCDW Known Issues Log
8	Partnership Data Extract Management	Employment Development Department
9	Reference Data Management	Common Functional Attributes
10	Star Schema Requirements Management	Contracts and Grants Star Schema Requirements
		Course Enrollment Star-Schema Requirements
		Degree Star-Schema Requirements
		Graduate Admissions Star-Schema Requirements
		Student Enrollment Star-Schema Requirements
		Student Financial Support Star-Schema Requirements
11	UAT Framework Requirements Management	Contracts and Grants UAT Validation Requirements [Stage and Base]
		Course Enrollment UAT Validation Requirements [Stage and Base]
		Degree UAT Validation Requirements [Stage and Base]
		Graduate Admissions UAT Validation Requirements [Stage and Base]
		Student Enrollment UAT Validation Requirements [Stage and Base]

#	Category Name	Projects
11	UAT Framework Requirements Management (Continued)	Student Financial Support UAT Validation Requirements [Stage and Base]
		Summer Student Enrollment UAT Validation Requirements [Stage and Base]
		Undergraduate Admissions UAT Validation Requirements [Stage and Base]
		University Student Aid Program File UAT Validation Requirements [Stage and Base]

Table 2: Project Categories and Corresponding Projects

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### 2.3.3. UCOP JIRA ROLES

1. IT Reviewers
2. Business Reviewers
3. System Administrators
4. JIRA-Administrators
5. Site-Admins

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#### 2.3.3.1. PERMISSIONS - IT REVIEWERS

The IT Reviewer role has been designed specifically for our IT partners. Permissions assigned to this role are as follows:

- Project Permissions
  - Browse Projects - Ability to browse projects and the issues within them.
  - Manage Sprints - Ability to manage sprints.
  - View Development Tools - Allows users in a software project to view development-related information on the issue, such as commits, reviews and build information.
  - View Read-Only Workflow - Users with this permission may view a read-only version of a workflow.
- Issue Permissions
  - Assignable User - Users with this permission may be assigned to issues.
  - Assign Issues - Ability to assign issues to other people.
- Voters and Watchers Permissions
  - Manage Watchers - Ability to manage the watchers of an issue.
  - View Voters and Watchers - Ability to view the voters and watchers of an issue.
- Comment Permissions
  - Add Comments - Ability to comment on issues.
  - Delete Own Comments - Ability to delete own comments made on issues.
  - Edit Own Comments - Ability to edit own comments made on issues.

- Attachment Permissions
  - Create Attachments - Users with this permission may create attachments.
  - Delete Own Attachments - Users with this permission may delete own attachments.
- Time Tracking Permissions
  - Edit Own Worklogs - Ability to edit own worklogs made on issues.
  - Work On Issues - Ability to log work done against an issue. Only useful if Time Tracking is turned on.

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### 2.3.3.2. PERMISSIONS – BUSINESS REVIEWERS

The Business Reviewer role has been designed specifically for our IRAP users. Permissions assigned to this role are as follows:

- Project Permissions
  - Browse Projects - Ability to browse projects and the issues within them.
  - View Development Tools - Allows users in a software project to view development-related information on the issue, such as commits, reviews and build information.
  - View Read-Only Workflow - Users with this permission may view a read-only version of a workflow.
- Issue Permissions
  - Assignable User - Users with this permission may be assigned to issues.
  - Assign Issues - Ability to assign issues to other people.
  - Create Issues - Ability to create issues.
  - Edit Issues - Ability to edit issues.
  - Schedule Issues - Ability to view or edit an issue's due date.
- Voters and Watchers Permissions
  - Manage Watchers - Ability to manage the watchers of an issue.
  - View Voters and Watchers - Ability to view the voters and watchers of an issue.
- Comment Permissions
  - Add Comments - Ability to comment on issues.
  - Delete Own Comments - Ability to delete own comments made on issues.
  - Edit Own Comments - Ability to edit own comments made on issues.
- Attachment Permissions
  - Create Attachments - Users with this permission may create attachments.
  - Delete Own Attachments - Users with this permission may delete own attachments.

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### 2.3.3.3. PERMISSIONS – ADMIN

If any of the functions below need to be performed, you will need the assistance of an IRAP Site Administrator. Simply add an IRAP Site Administrator as a watcher on the issue and create a comment that will trigger an email notification signaling that the admin needs to take the action that you require on the issue.

If the Site Administrator is the reporter of the issue, there is no need to take the extra step to add them as a watcher. The reporter of an issue gets email notifications based on any added comments.

- *Closing Issues* – Ability to close issues
- *Deleting Issues* – Ability to delete issues
- *Linking Issues* – Ability to link issues together and create linked issues
- *Modifying Reporters* - Ability to modify the reporter when creating or editing an issue
- *Moving Issues* - Ability to move issues between projects or between workflows of the same project (if applicable). Note the user can only move issues to a project he or she has the create permission for.
- *Reopening Issues* - Ability to resolve and reopen issues.
- *Transition Issues* - Ability to transition issues

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### 2.3.3.4. IRAP JIRA ADMINISTRATORS

1. Ola Popoola – [ola.popoola@ucop.edu](mailto:ola.popoola@ucop.edu)
2. Sanketh Sangam – [sanketh.sangam@ucop.edu](mailto:sanketh.sangam@ucop.edu)
3. Poorani Rajamanickam – [poorani.rajamanickam@ucop.edu](mailto:poorani.rajamanickam@ucop.edu)

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### 2.3.4. ISSUES

An issue is a task that requires an action from a person. Issues are tied to other features such as workflows, screens, fields, attributes and schemes.

In IRAP's use of JIRA, an issue represents one of the following:

- I. A code asset
- II. A data requirement (star schema, data mart, validation, audit or web application requirement)

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#### 2.3.4.1. ISSUE TYPES

There are a variety of issue types available in Jira. Currently, IRAP only uses the Task type at this time. As our use of the tool expands, we will explore other task types such as Sub-task, Improvement, and Story.

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**2.3.5. WORKFLOW**

Workflow is the movement of an issue through various statuses during its lifecycle. IRAP has configured a few project category specific workflows in Jira.

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**2.3.6. STATUSES**

Statuses are workflow specific. A few statuses in use within IRAP's implementation of Jira include:

- I. Draft
- II. Open
- III. IRAP Question/Issue
- IV. Approved
- V. ITS Question/Issue
- VI. ITS verified
- VII. Frozen for Build
- VIII. Rejected
- IX. Deferred
- X. UAT
- XI. Bug Found
- XII. Done

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**2.3.7. COMMENTS**

Comments provide the opportunity to record additional detail about an issue and collaborate with IRAP team members and IT partners.

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**2.3.8. WATCHERS**

Jira makes it simple to keep project team members in the loop and stay on top of project issues. When a person watches an issue they get a more complete set of notifications during the entire lifecycle of the issue. Watchers see all of the major events in an issue's lifecycle: all field changes, reassignments, and comments.

You may want to be a watcher on issues that are critical to your research and analysis. You'll want to stay on top of all of the updates the team gives on that issue. Watching helps you stay connected to that issue from the point of discovery all the way to resolution. Keep in mind that watching can generate a lot of email traffic though, so be specific in the issues you choose to watch.

## 3. GETTING STARTED WITH IRAP JIRA

### 3.1. LOGGING INTO JIRA

There are two ways to access the UCOP IRAP Jira instance:

#### 3.1.1. DIRECT ACCESS VIA ATlassian URL

- I. Copy and paste the web link <https://ucidwrequirements.atlassian.net/login> into your web browser.
- I. Enter your email address and click the 'Next' button. All users are set up with their UCOP email address.
- II. Enter your password.

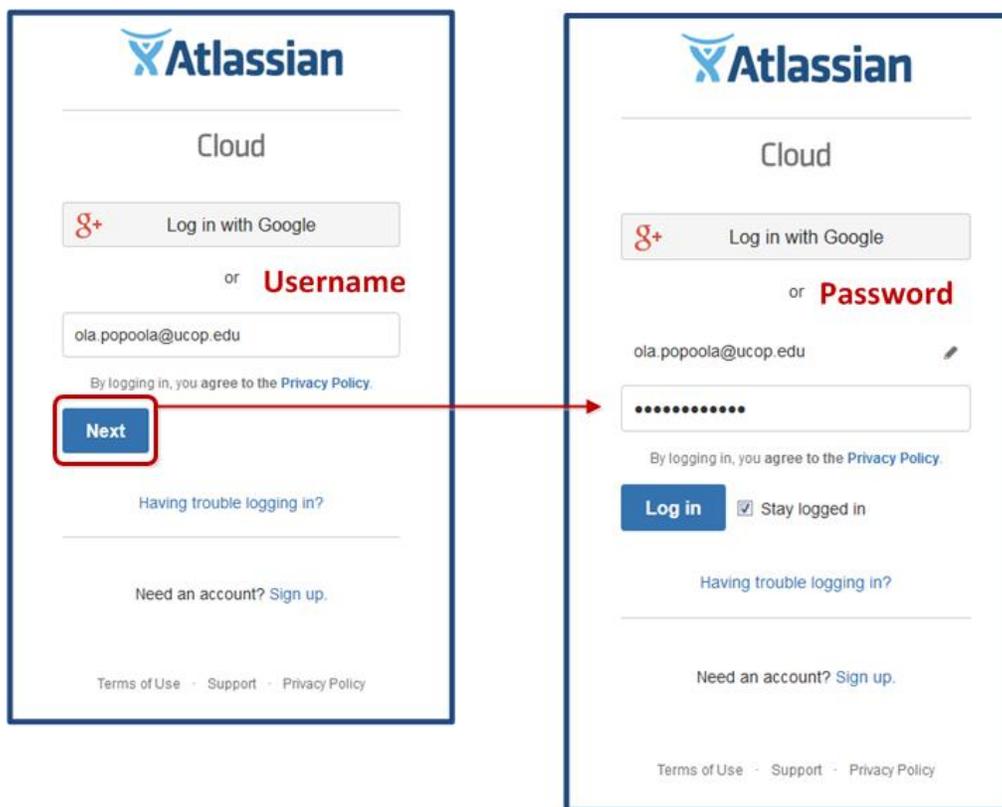


Figure 1: Accessing Jira Directly Via Atlassian Link

#### 3.1.2. ACCESS VIA DATA OPERATIONS HUB

- I. Go to the Data Operations hub via <http://data.ucop.edu/>.
- II. Navigate to the bottom right hand-side of the page to the Accessing Atlassian Jira section.
- III. Click on the 'Sign-in to JRA' link.

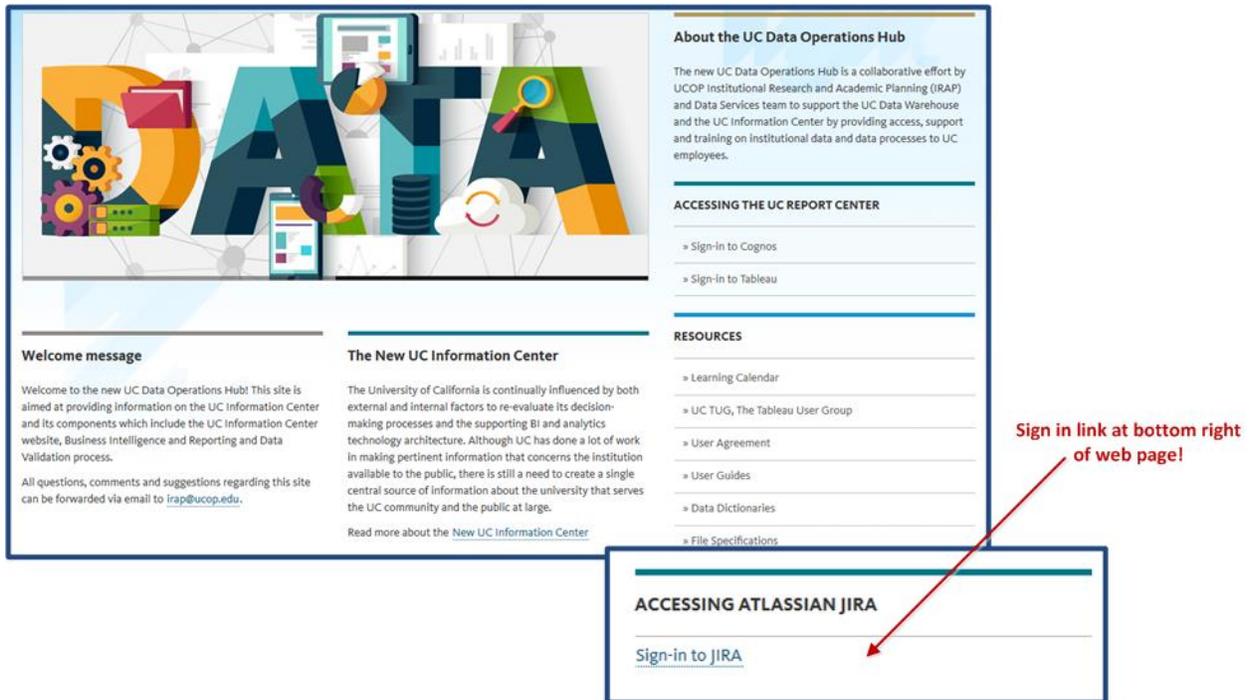


Figure 2: Accessing Jira via Data Hub

## 3.2. WORKING WITH ISSUES

### 3.2.1. BROWSING PROJECTS

To browse projects in Jira:

- I. Log into Jira.
- II. Navigate to the Projects menu item. Select 'View all projects'

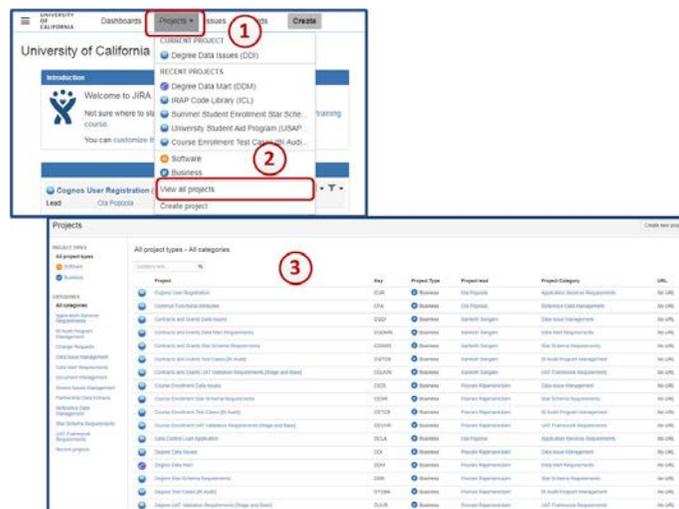


Figure 3: Browsing Projects

3.2.2. CREATING AN ISSUE

***Business users can create only data issues. All other requirements are always created by the data infrastructure team.*** To create a data issue:

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool. Select the project you want to submit a data issue about.
- III. Details around the existing data issues regarding that project will be displayed.

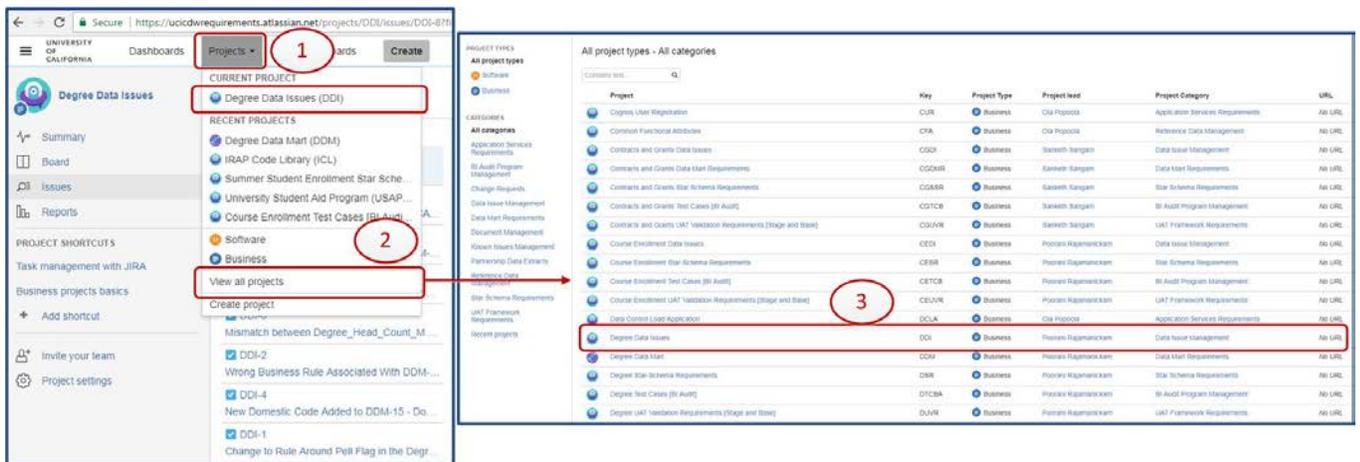


Figure 4: Select a Project

- IV. In the example above and below, the 'Degree Data Issues' is selected.

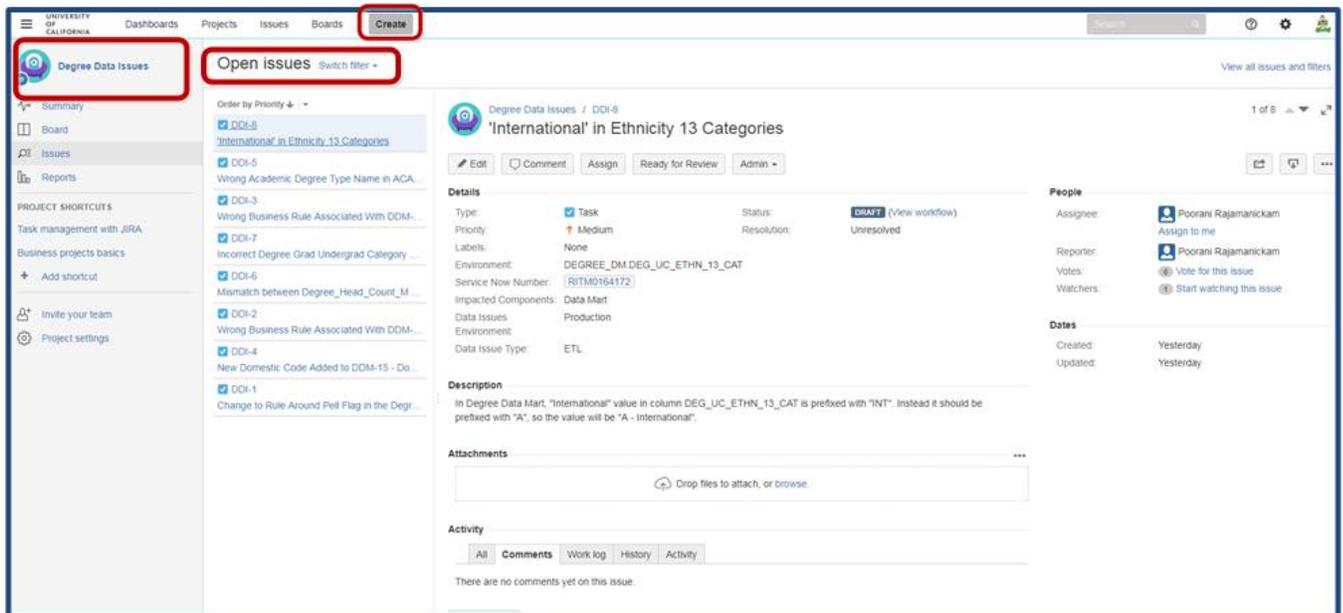


Figure 5: See Existing Data Issue

- V. Click on the *'Create'* button as shown below:



Figure 6: Creating an Issue: Create button

- VI. Using the data mart requirements management screen as an example, enter the information required to create an issue as shown below:

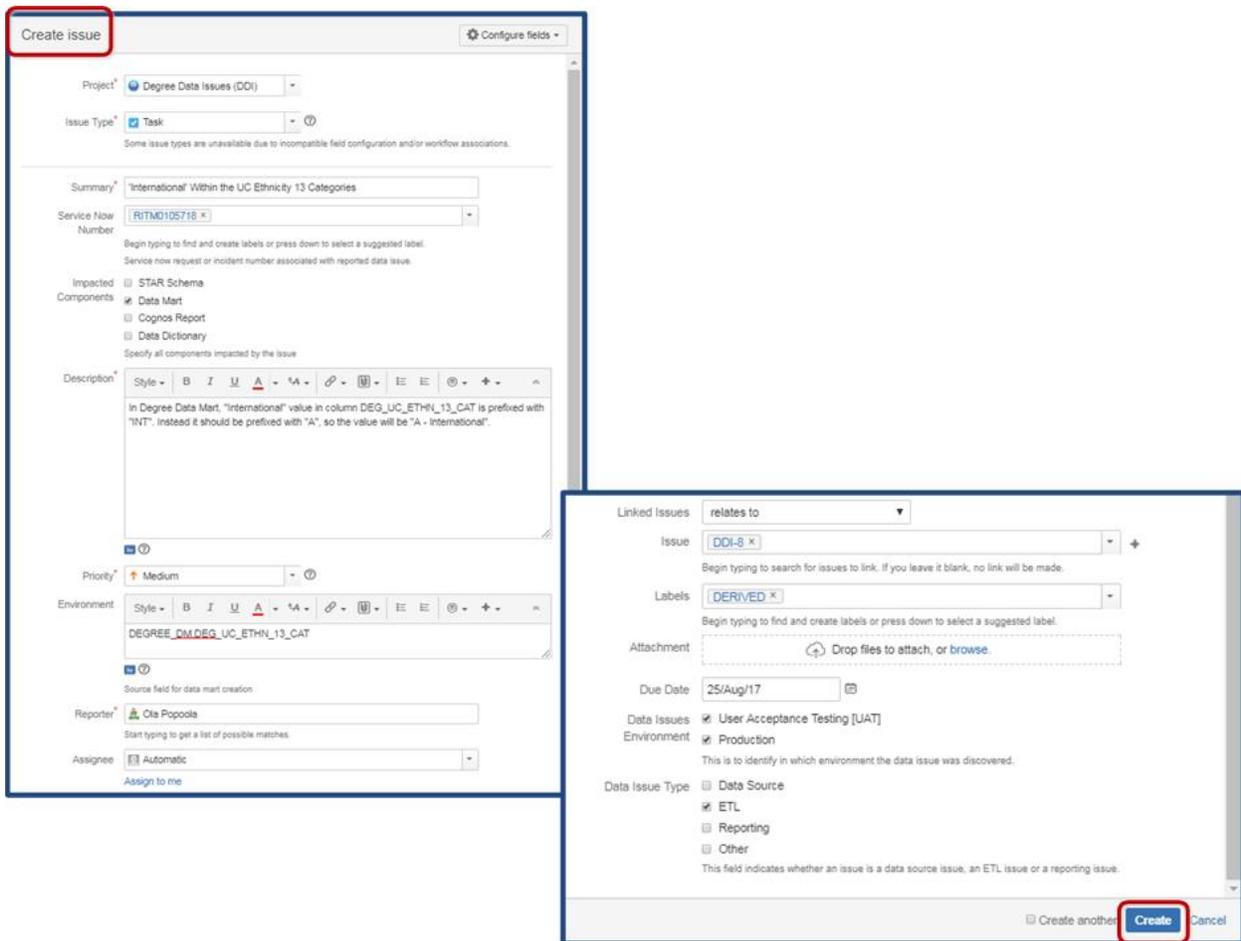


Figure 7: Creating an Issue: Create Issue Screen

- VII. Make sure that the right *project* is selected.
- VIII. Ensure that the *issue type* is set to 'Task'.
- IX. Enter a succinct *summary* of the data issue.
- X. Leave the *Service Now* number blank. The data infrastructure team will review the data issue and create a Service Now ticket if needed.

- XI. Identify the *impacted components* – star, data mart, and Cognos report or data dictionary. There may be more than one component impacted by the issue.
- XII. Provide a good *description* of the data issue. The description must be very clear so that both the IRAP data infrastructure and IT partners have enough to build upon.
- XIII. Set the *priority* of the issue – options are highest, high, medium and low.
- XIV. Supply the *environment(s)* or sources (table name and column name) of the data element related to the issue.
- XV. The *reporter* is automatically populated based on user ID.
- XVI. Choose *assignee* (the person that will be working on the issue). If an assignee is not selected, it defaults to you, the reporter.
- XVII. Add a *label* or labels that may be useful during searches and filtering. Labels should always be in uppercase letters. Some of the labels in use are DERIVED, AUDIT, ADVANCEMENT, DATAMART, DEPARTURE\_EXIT, FST\_TERM\_YR\_ENRL, VALIDATION etc.
- XVIII. Include any *attachments* related to the issue. Convert all Word, Excel, and PowerPoint documents to Acrobat PDF before uploading.
- XIX. Indicate a preferred *due date* that you would like for the issue to be resolved.
- XX. Specify the *data issue type* in question – data source, ETL, reporting or other.
- XXI. Click on the ‘*Create*’ button to save issue details.

### 3.2.3. EDITING AN ISSUE

To edit an existing data issue:

- I. Log into Jira.
- II. Go to the Projects menu option. Select ‘*View all projects*’ to get a complete list of projects in the tool. Select the project you want to submit a data issue about.
- III. Details around the existing data issues regarding that project will be displayed.

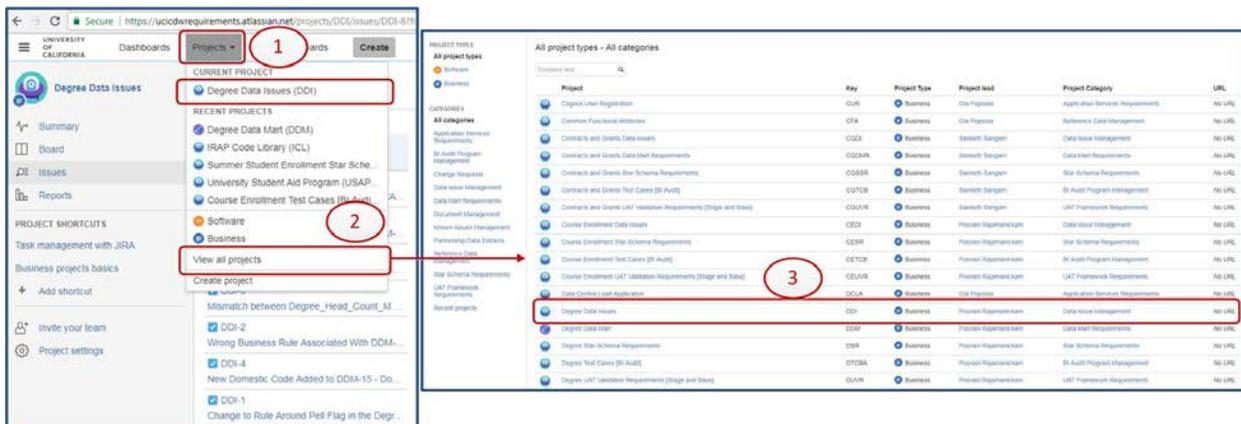


Figure 8: Finding a Project

- IV. In the example above and below, the ‘*Degree Data Issues*’ is selected.

V. Select the issue you would like to edit and click on the **'Edit'** button as shown below.

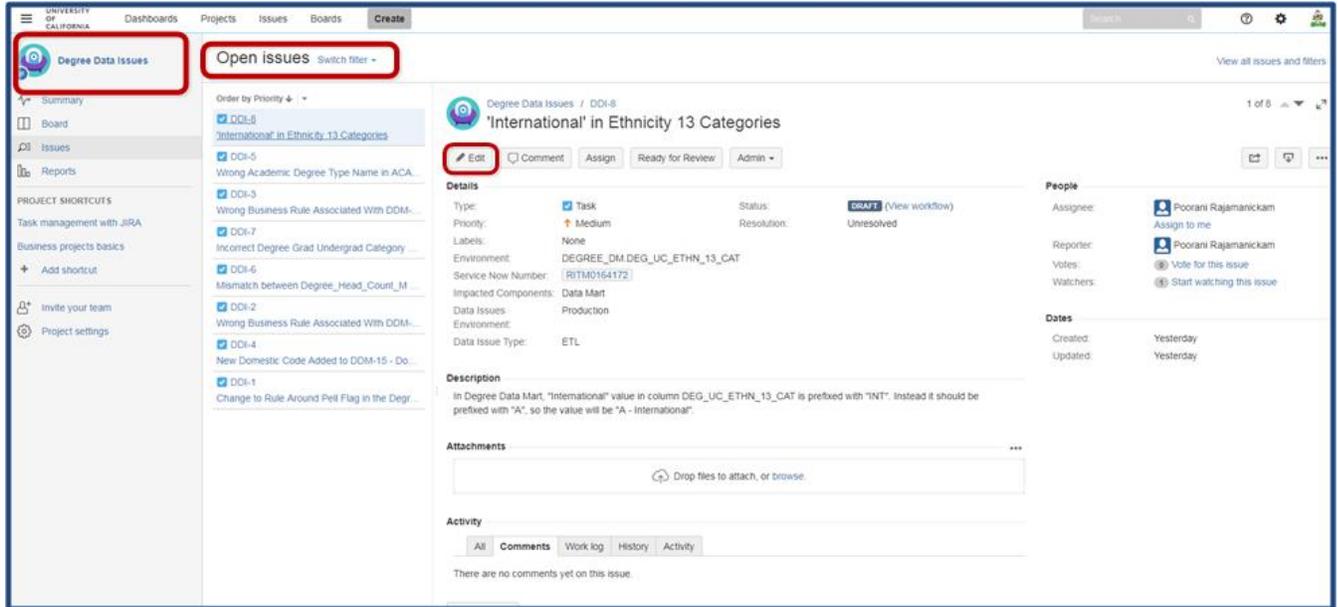


Figure 9: The Edit Function

VI. Edit the data issue in the chosen areas. Add comments explaining the update and click on the **'Update'** button.

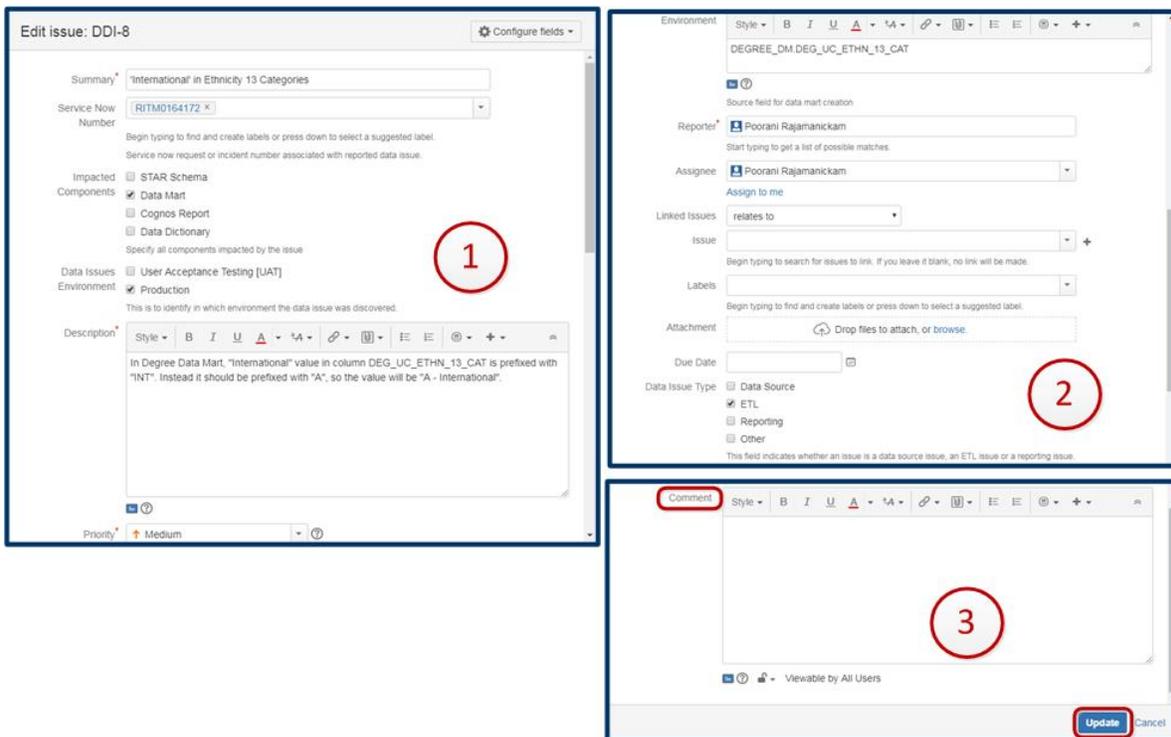


Figure 10: Edit and Update a Data Issue

### 3.2.4. ASSIGNING ISSUES

To assign a data issue:

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool. Select the project for which you want to assign an issue.
- III. Details around the existing data issues regarding that project will be displayed.
- IV. Select the issue you would like to assign a person to and click on 'Edit' button.
- V. Click on the 'Assignee' option and select the user that you would like to assign the data issue to.
- VI. Click on the 'Update' button once the selection is complete.

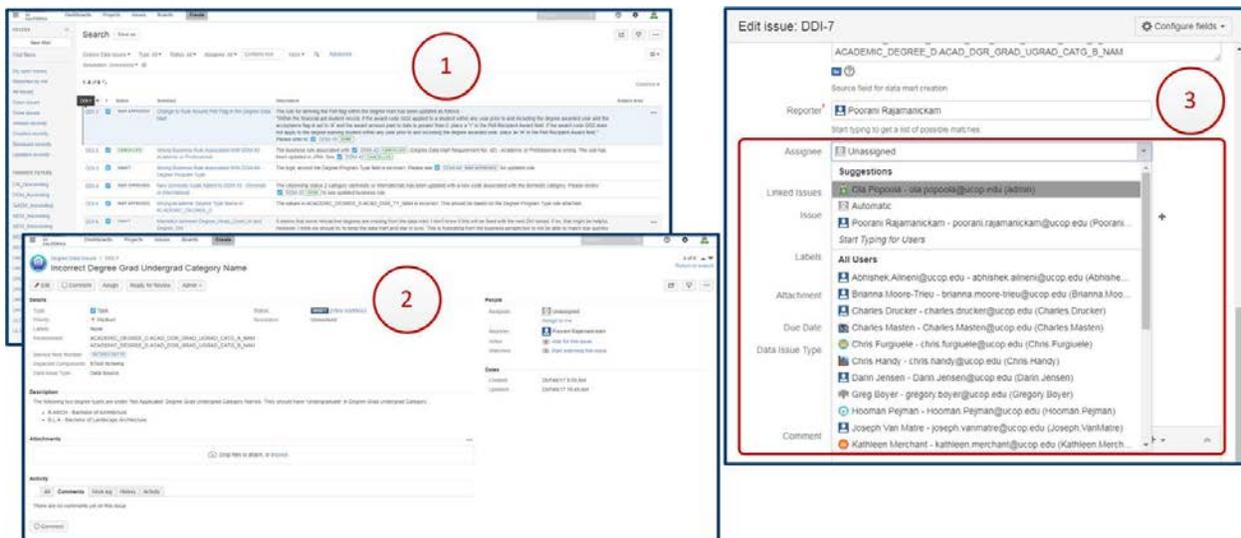


Figure 11: Assigning a Data Issue

### 3.2.5. VIEWING AND SCHEDULING ISSUES

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool.
- III. Select the project you are interested in.
- IV. Details around the existing data issues regarding that project will be displayed.
- V. Select the data issue you would like to view or schedule.
- VI. If you would like to change the due date, click on the 'Edit' button.
- VII. Alter the 'Due Date' to the date of your choice.

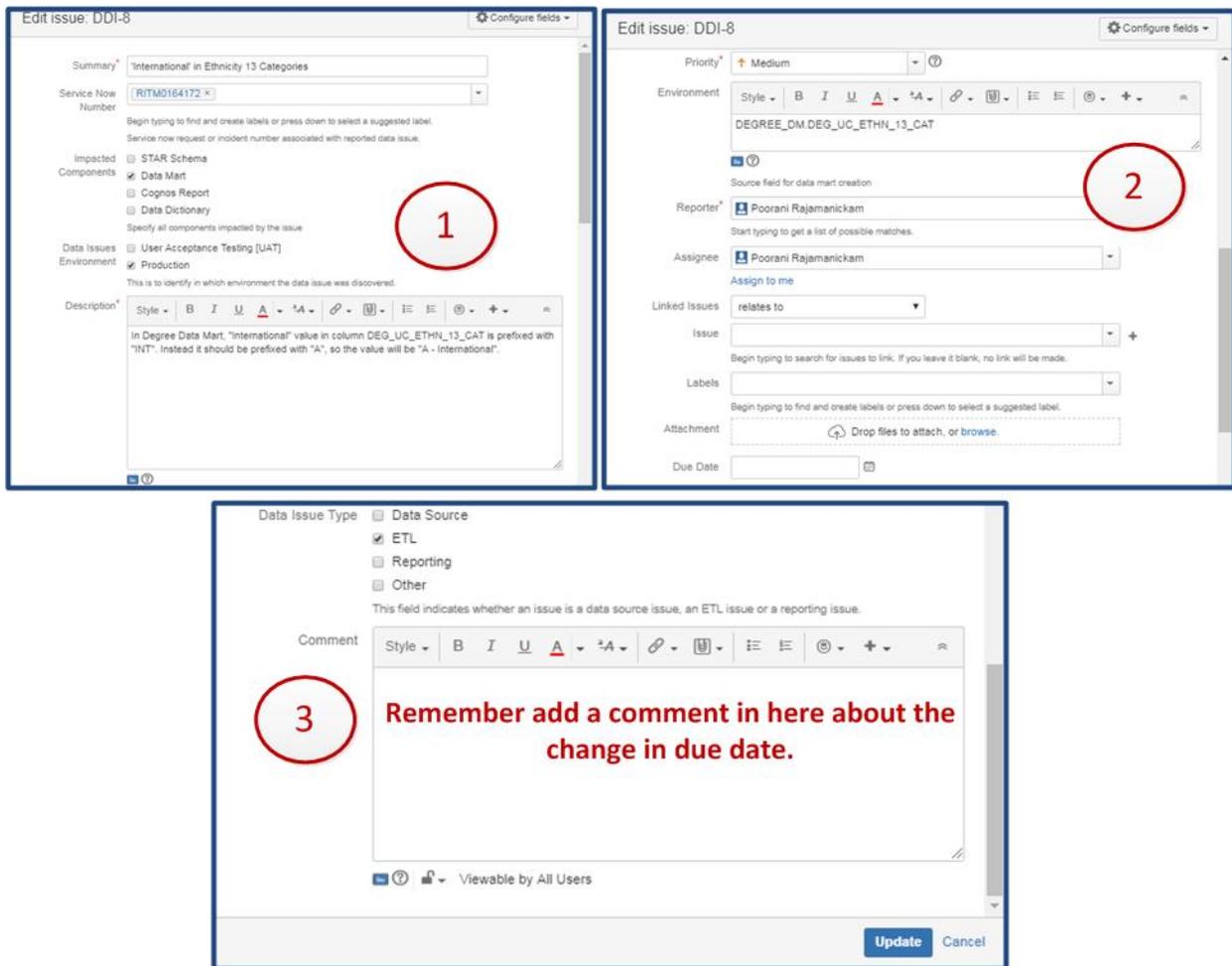


Figure 12: View or Schedule Issues

### 3.2.6. VIEWING READ-ONLY WORKFLOW

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool.
- III. Select the project you are interested in.
- IV. Details around the existing data issues regarding that project will be displayed.
- V. Select a data issue to view the associated workflow.
- VI. Click on the 'View Workflow' link tied to 'Status'.
- VII. A workflow page will be launched displaying a graphical view of the workflow in use for your project.
- VIII. Mouse over objects to view workflow transition names if required.

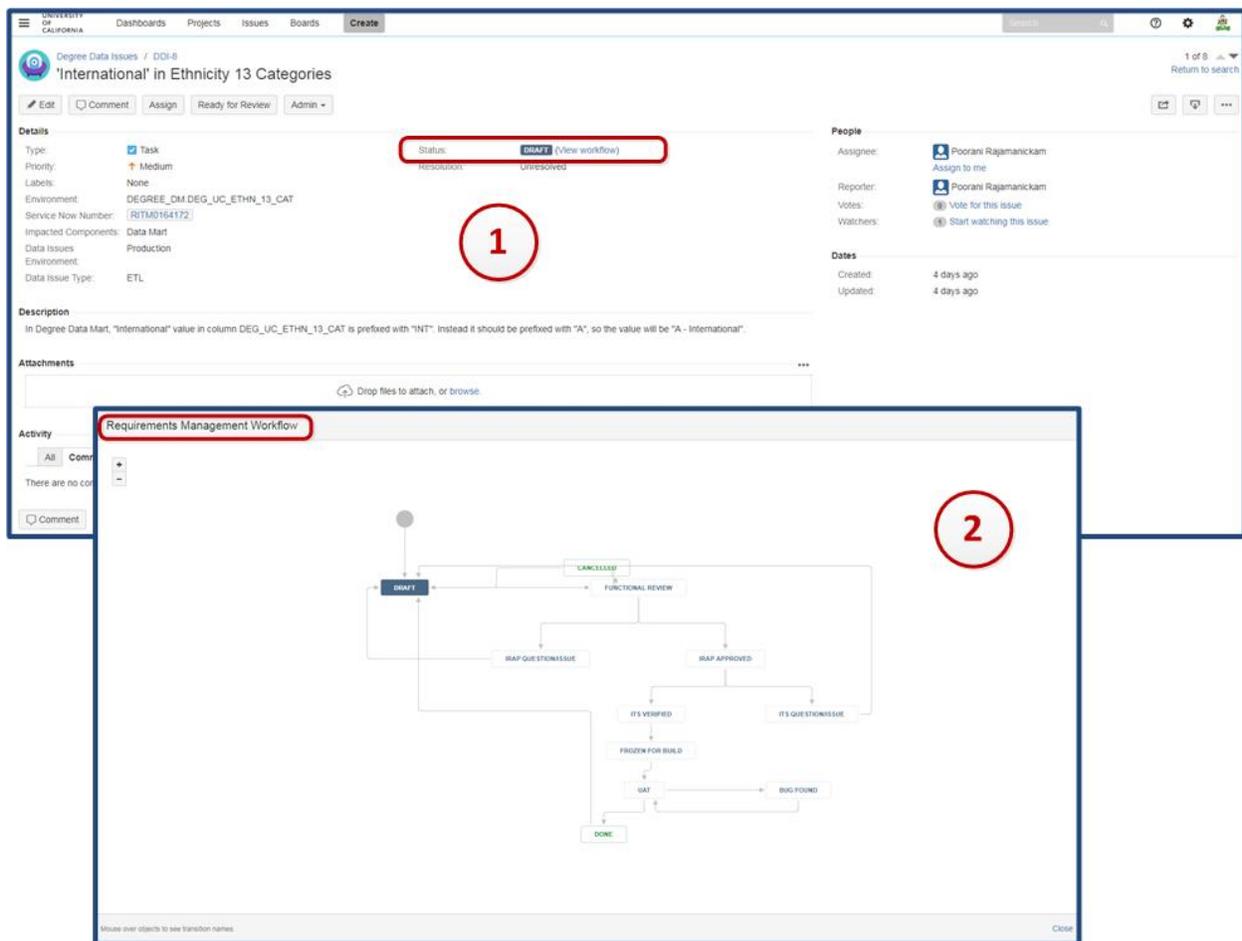


Figure 13: Viewing Workflows

### 3.2.7. MANAGING WATCHERS

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool.
- III. Select the project you are interested in.
- IV. Details around the existing data issues regarding that project will be displayed.
- V. Select the data issue that you want to add watchers to or remove watchers from.
- VI. Under 'People' on the right-hand side of the issue, click on the 'Start watching this issue' link if you simply want to add yourself as a watcher on an issue.
- VII. If you want to add other users to an issue, click on the 'Add watchers' link
- VIII. Start typing the name of the user and the full user's name will be auto-populated.

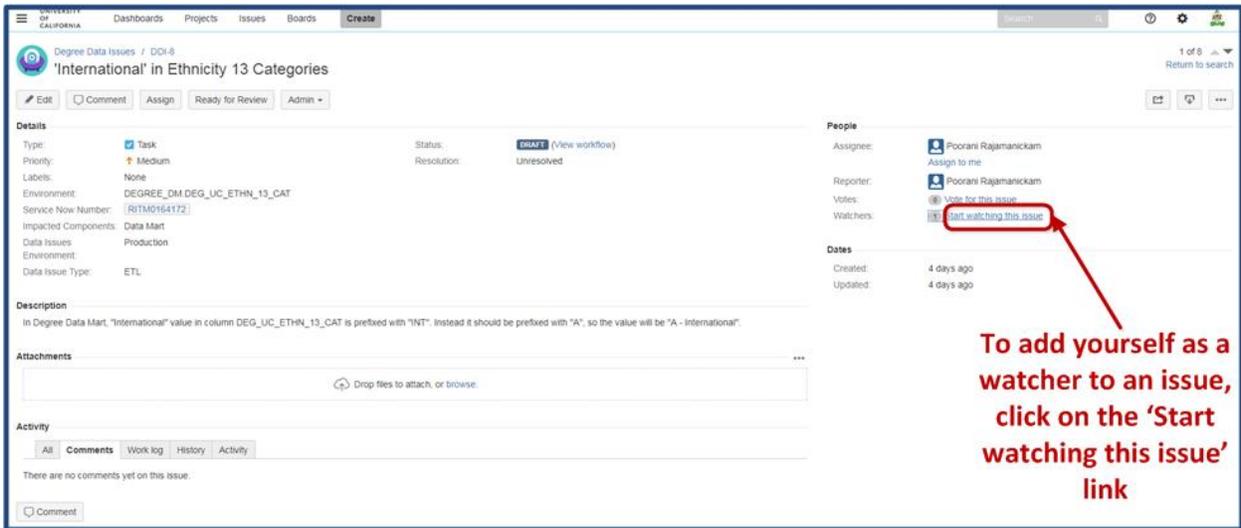


Figure 14: Adding Yourself as a Watcher to an Issue

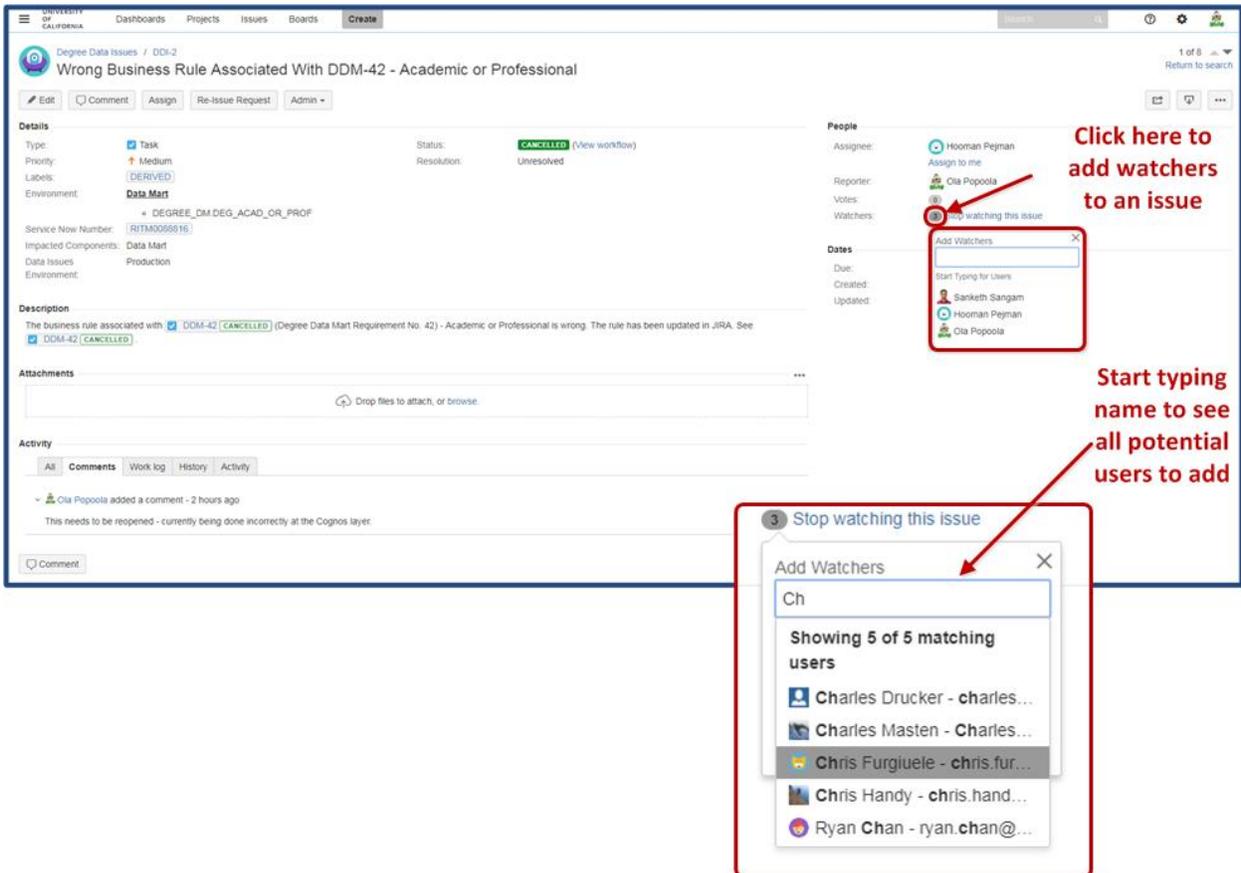


Figure 15: Adding Others as Watchers

### 3.2.8. VIEWING VOTERS

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool.
- III. Select the project you are interested in.
- IV. Details around the existing data issues regarding that project will be displayed.
- V. Select the data issue that you want to vote for or view the current voters on.
- VI. To become a voter on an issue, click on the 'Vote for this issue' link.
- VII. To view voters on an issue, click on the 'View voters' link.
- VIII. To remove your vote, click on the 'Remove vote for this issue' link.

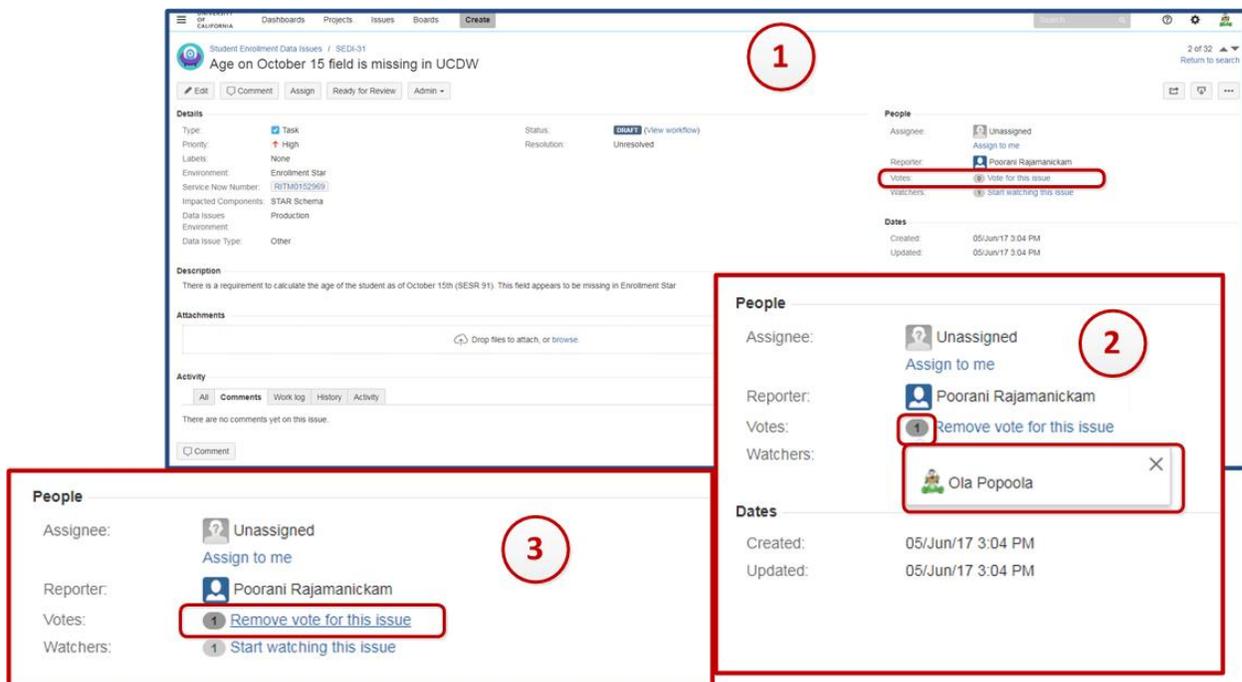


Figure 16: Add Yourself as a Voter or View Your Voter

### 3.2.9. ADDING COMMENTS

- I. Log into Jira.
- II. Go to the Projects menu option. Select 'View all projects' to get a complete list of projects in the tool.
- III. Select the project you are interested in.
- IV. Details around the existing data issues regarding that project will be displayed.
- V. Select the data issue that you want to add a comment to.
- VI. Click on the 'Comment' button. There are two options – one at the top left-hand side of the screen and another at the bottom left-hand side.

- VII. The comment field will be displayed. Add your comments and click on the **'Add'** button.
- VIII. The comment will be added to the **'Activity'** section.

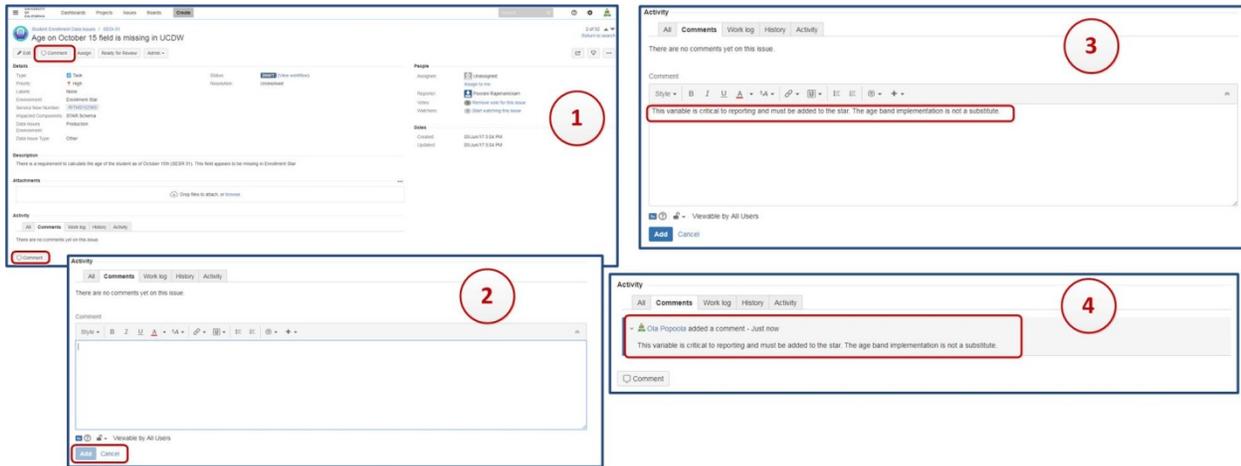


Figure 17: Adding comments

### 3.2.10. EDITING COMMENTS

- I. Log into Jira.
- II. Go to the Projects menu option.
- III. Select **'View all projects'** to get a complete list of projects in the tool.
- IV. Select the project you are interested in.
- V. Details around the existing data issues regarding that project will be displayed.
- VI. Select the data issue that you want to edit a comment on.
- VII. Note: You can only edit your own comments.
- VIII. Click on the ... option on the right-hand side of the comment.
- IX. Select the **'Edit'** option.
- X. Enter your updates and click on the **'Save'** button.
- XI. Your newly added updates will be visible in the comments section.

### 3.2.11. DELETING COMMENTS

- I. Log into Jira.
- II. Go to the Projects menu option.
- III. Select **'View all projects'** to get a complete list of projects in the tool.
- IV. Select the project you are interested in.
- V. Details around the existing data issues regarding that project will be displayed.
- VI. Select the data issue that you want to delete a comment from.
- VII. Note: You can only delete your own comments.
- VIII. Click on the ... option on the right-hand side of the comment.
- IX. Select the **'Delete'** option.

- XII. To delete, click on the *'Delete'* option.
- XIII. A warning message will appear asking you to confirm the delete operation.
- XIV. Click *'Delete'* and comment will be removed from the issue.

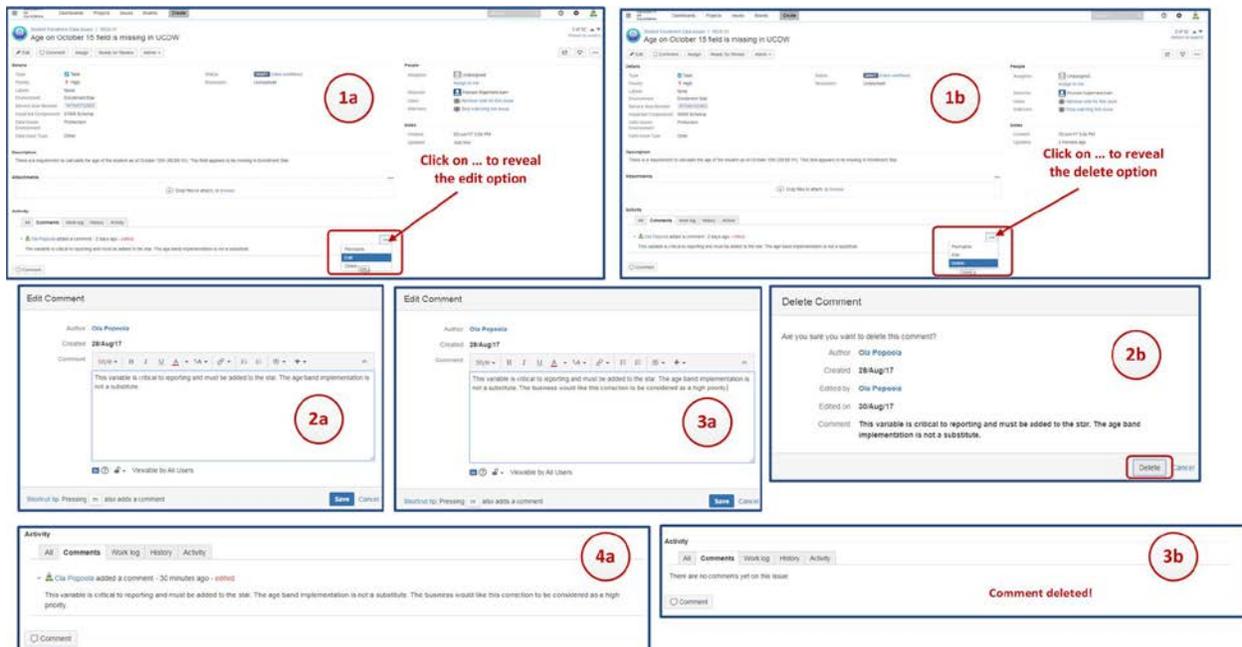


Figure 18: Edit or Delete a Comment

### 3.2.12. CREATING ATTACHMENTS

- I. Log into Jira.
- II. Go to the Projects menu option.
- III. Select *'View all projects'* to get a complete list of projects in the tool.
- IV. Select the project you are interested in.
- V. Details around the existing data issues regarding that project will be displayed.
- VI. Select the data issue that you want to create an attachment to.
- VII. Click on the browse button in the middle of the screen.
- VIII. A windows explorer window will be launched.
- IX. Navigate to the directory and file on your PC or network that you want to attach to the issue.
- X. Click on the document and then the *'Open'*.
- XI. The attachment will be loaded against the issue.
- XII. To delete an attachment, mouse over the attachment to display the trash bin icon.
- XIII. Click on the trash bin icon, a confirmation delete message is displayed.
- XIV. Click on the *'Delete'* button to remove the attachment from the issue.

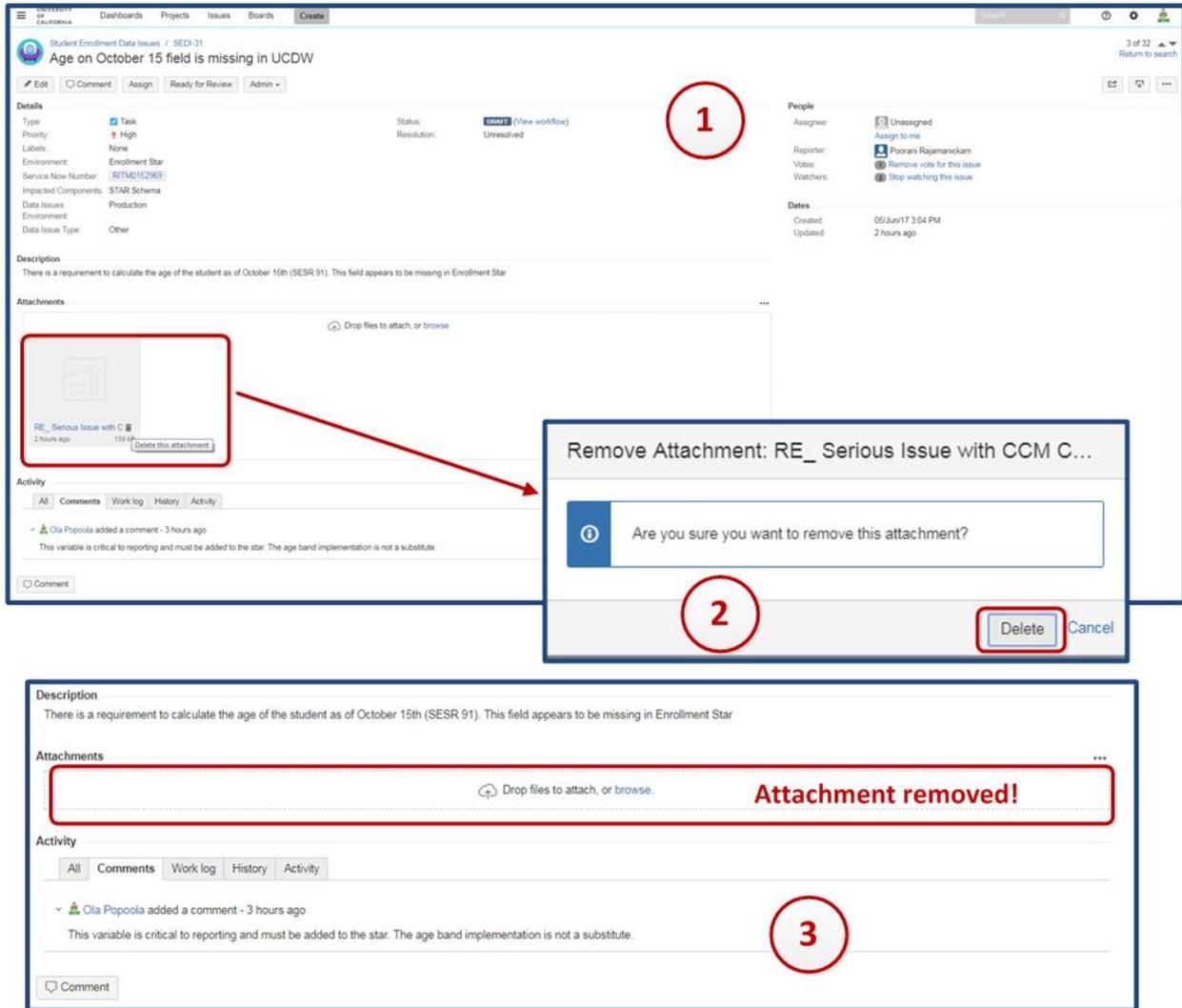


Figure 19: Add or Delete a Comment

### 3.3. GOT QUESTIONS?

For questions and comments regarding this document, please contact:

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