



THE ABC'S OF JIRA

An Introductory Manual to Mastering the JIRA Application



FEBRUARY 21, 2018

OFFICE OF CONTRACT & GRANT ADMINISTRATION (OCGA)
University of California, San Diego

Table of Contents

| | | |
|-------------|--|-----------|
| I. | Overview of JIRA Core | 1 |
| a. | What is JIRA? | 1 |
| b. | Why JIRA? | 1 |
| c. | What Are the Benefits of JIRA? | 1 |
| d. | An Introduction to the JIRA Dashboard..... | 1 |
| e. | What is a Project? | 2 |
| i. | Workflows | 3 |
| ii. | Boards | 4 |
| f. | What is an Issue? | 4 |
| i. | Proposals..... | 4 |
| ii. | Awards | 5 |
| II. | Getting Started | 6 |
| a. | Logging In..... | 6 |
| b. | Exploring the JIRA Dashboard | 8 |
| c. | Your List of Issues | 16 |
| III. | Working With Issues | 20 |
| a. | A Preview of an Issue in Full View | 20 |
| b. | Attachments..... | 25 |
| i. | Drag & Drop | 25 |
| ii. | Browses & Attach..... | 27 |
| c. | Checklists | 30 |
| i. | Creating Checklists | 30 |
| IV. | Working With Boards..... | 32 |

| | |
|---------------------------------|----|
| a. Workflows | 33 |
| b. Quick Filters | 33 |
| c. Quick Views | 33 |
| i. Attachments | 33 |
| ii. Subtasks..... | 33 |
| iii. Links..... | 33 |
| V. Appendix | |
| a. Short-Cuts | 34 |
| b. Email Notifications | 35 |
| c. Issue Types and Fields | 37 |

I. OVERVIEW OF JIRA CORE

a. What is JIRA?

JIRA is a project management solution, used for the purposes of managing work and collaborating. JIRA Core is a JIRA application that provides you with a workflow management system that you can use for many things, including running projects, tracking work, and basically anything that requires work moving through a workflow. JIRA Core is customized to suit our needs, linked with other applications (e.g. ePD) to provide us with the solution to track all your work in one place.

Understanding the basics of JIRA Core will help you get the most out of the application. This page will explain the core terminology and functionality that makes JIRA Core the application to help manage your work efficiently.

b. Why JIRA?

JIRA is a tool that is used to expedite the process of organizing a team together, in order to solve issues at hand. In our case, JIRA will be used to keep track of our progress in addressing proposal and award issues, and to collaborate effectively with one another.

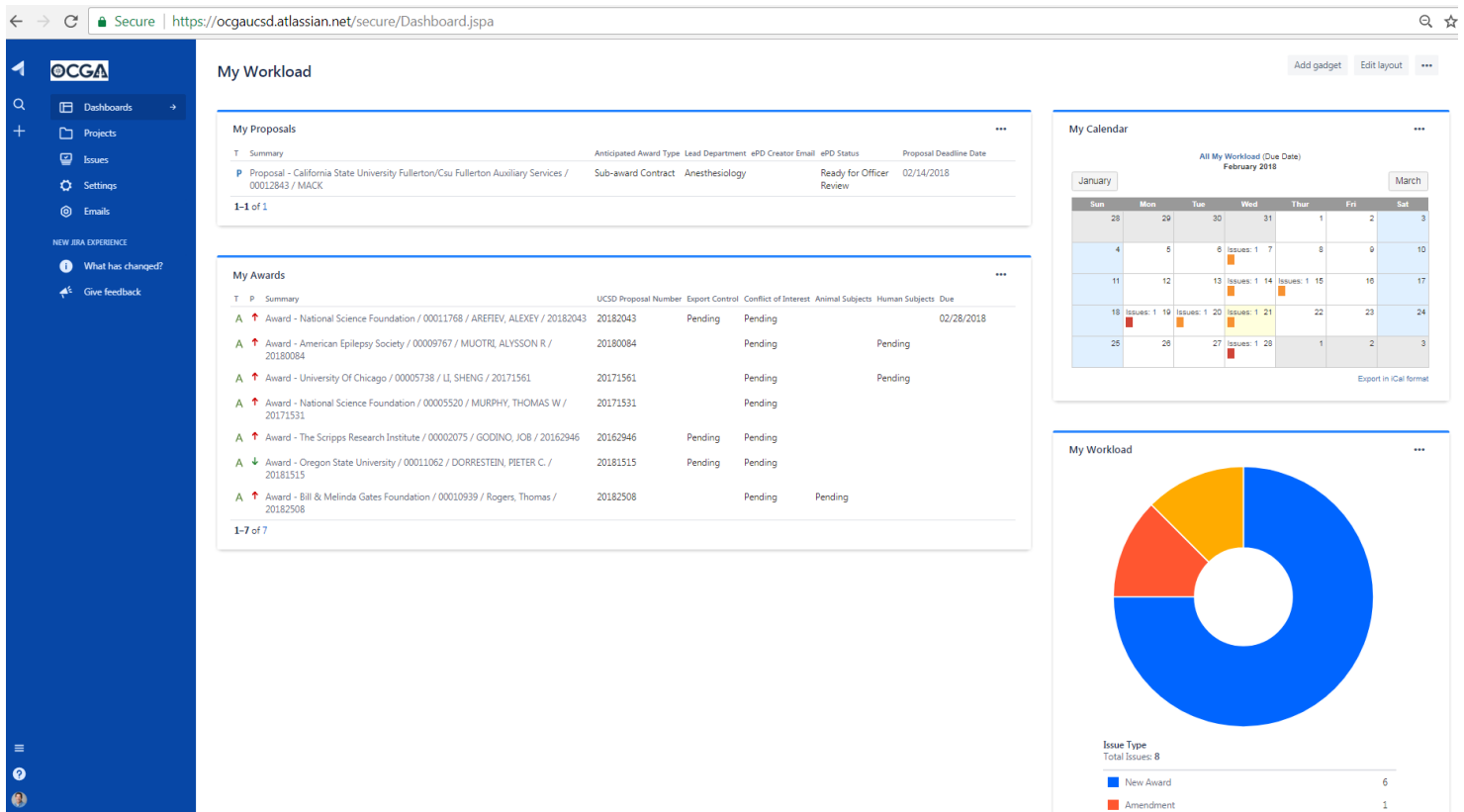
c. What Are the Benefits of JIRA?

With JIRA, organizations can consolidate issues into one application. This means that, in terms of our organization, proposal and award issues can be consolidated and viewable in one location. This will streamline the process of accomplishing tasks in a timely manner.

d. An Introduction to the JIRA Dashboard

What's the first thing you do when you get into your car and turn the ignition? You check your dashboard.

Well, just like checking your car's dashboard, OCGA's dashboard will provide you and your team with a comprehensive overview of your Contract & Grant work, status at a glance, including the tasks that need to be done, team members' individual progress, and more.



e. What is a Project?

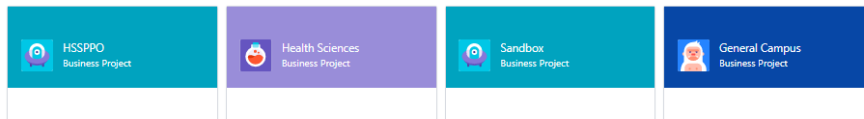
Projects are collections of issues or, in our case, units of work. Projects are a way to group issues and organize work. Users may work with issues in one or several projects, and would complete the work required to progress the issues through their workflows.

Currently, we have the following Project Categories:

- Workload Projects (General Campus, Health Sciences, Reports)
- Operational Projects (Business Operations)
- Knowledge Sharing (SOP Working Group)

Projects

Recently viewed



| Name | Key | Type | Owner | Category | URL |
|---------------------|--------|----------|----------------|-------------------|-----|
| Business Operations | BO | Business | Ross Dammann | Operations | -- |
| Closeouts | CO | Business | Ernesto Donate | -- | -- |
| General Campus | GC | Business | Ernesto Donate | Workload | -- |
| Health Sciences | HS | Business | Ernesto Donate | Workload | -- |
| HSSPPO | HSSPPO | Business | Ernesto Donate | -- | -- |
| JIRA Implementation | JL | Business | Ernesto Donate | -- | -- |
| OCGA Reports | OR | Business | Ross Dammann | Operations | -- |
| Sandbox | ADE | Business | Ernesto Donate | Workload | -- |
| SOP Working Group | SWG | Business | Ross Dammann | Knowledge Library | -- |

Project Key

i. Workflows

Workflow dictates how an issue can be progressed in a project. Each project has its own workflow. Workflows can be as simple or as complex as you need them. Workflows are made up of statuses (or steps) and transitions (movements between statuses). When you create an issue, it will automatically be assigned a workflow and a status on that workflow. Where it can move to is defined by the transitions that exit that status. An example of the default workflow that ships with JIRA Core is shown below:



ii. Boards

JIRA Boards are different than Dashboards. A Board is essentially the workflow in columns. (To Do → In Progress → Proposal Submitted → Award Setup → Done). Boards make it easy to visually see your work distributed among the different statuses. To move an issue (e.g. work unit) from one status to another, simply click and drag the issue to the appropriate column.

The screenshot shows the JIRA Board for the 'Health Sciences Business project'. The board is organized into five columns representing different stages of the workflow: TO DO, IN PROGRESS, PROPOSAL SUBMITTED, AWARD ENTRY, and DONE. Each column contains a list of proposals, each with a unique ID and a brief description. The 'TO DO' column has 83 items, 'IN PROGRESS' has 13, 'PROPOSAL SUBMITTED' has 2, 'AWARD ENTRY' has 0, and 'DONE' has 307. The proposals are listed in descending order of their IDs. The interface includes a sidebar with navigation options like Summary, Board, Issues, Reports, ePD, Blink, Research Administration Reports, OCGA Home Page, Fund Number Lookup, Add item, and Settings. The top of the board shows filters for 'Assigned to me' and 'Due this week'.

| TO DO 83 | IN PROGRESS 13 | PROPOSAL SUBMITTED 2 | AWARD ENTRY 0 | DONE 307 |
|--|--|---|---------------|--|
| Proposal - Abbott Laboratories (Encl Perclose) / 00012058 / CHAKRAVARTHY, KRISHNAN V. / HS-492 | Proposal - Genentech, Inc. / 00010744 / GENG, BOB / HS-445 | Proposal - American Gastroenterological Association / 00008295 / DUAL, PARAMBIR SINGH / HS-363 | | Proposal - Neuro Corporation / 00006737 / LERMAN, IMANUEL RUVIN / 20172749 / HS-307 |
| Proposal - California Department Of Public Health / 00009004 / KILLEEN, JAMES P. / 20174373 / HS-386 | Proposal - Janssen Biotech Inc. / 00011780 / CHAMBERS, CHRISTINA / HS-479 | Proposal - North Carolina Central University / 00008584 / CHERRY, REBECCA N / 20174669 / HS-368 | | Proposal - California Institute For Regenerative Medicine / 00006791 / CAMPANA, WENDY M. / 20172574 / HS-308 |
| Proposal - Crohn'S & Colitis Foundation Of America / 00010180 / SANDBORN, WILLIAM JEFFERY / HS-426 | Proposal - Sponsor Code Pending / 00011893 / ILFELD, BRIAN M. / HS-488 | | | Proposal - American Association For Cancer Research / 00006836 / CARTER, HANNAH KATHRYN / 20172465 / HS-309 |
| Proposal - University Of Southern California / 00010470 / STRONG, DAVID R / 20180822 / HS-439 | Proposal - Pathfinder International / 00012023 / SILVERMAN, JAY GLEN / HS-491 | | | Proposal - California Institute For Regenerative Medicine / 00006843 / SONG, HYE-WON / 20172572 / HS-310 |
| Proposal - The Scripps Research Institute / 00011251 / GODINO, JOB GIDEON / HS-457 | Proposal - Pfizer Inc. / 00012180 / CHAMBERS, CHRISTINA / HS-494 | | | Proposal - The Robert Wood Johnson Foundation / 00006847 / SALLIS, JAMES F / 20172417 / HS-311 |
| Proposal - Duke University / 00011411 / RAISINGHANI, AJIT B. / HS-464 | Proposal - The Hospital For Sick Children / 00012220 / EICHENFIELD, LAWRENCE / HS-497 | | | Proposal - UH Harrington Discovery Institute / 00006873 / BOTTINI, NUNZIO / 20172430 / HS-312 |
| Proposal - Sponsor Code Pending / 00011456 / TU, XIN / HS-467 | Proposal - Centers For Disease Control And Prevention / 00012577 / ZIVE, MICHELLE MURPHY / 20182729 / HS-513 | | | Proposal - American Academy Of Allergy, Asthma And Immunology / 00006914 / CHAMBERS, CHRISTINA / 20 / HS-313 |
| Proposal - Bill & Melinda Gates Foundation / 00011554 / AL-DELAJMY, WAEI / HS-471 | Proposal - American Heart Association / 00012616 / SIMONSON, TATUM SASHA SUMM / HS-517 | | | Proposal - California Institute For Regenerative Medicine / 00006927 / KING, CHARLES C / 20172514 / HS-314 |
| + Create | Proposal - Uc San Francisco / 00012754 / KRONICK, RICHARD G / | | | |

f. What is an Issue?

Issues are different kinds of tasks or things that we work on and need to get done within OCGA. Issues can be proposals, awards, award transactions, operational tasks, general inquiries, special projects, and/or reporting needs. An issue is essentially a form that contains a list of fields that need to be populated, that is, key pieces of information that helps us to complete the task. For proposal and awards we use the following issue types:

i. Proposals

- New Proposal

- Post-Submission Action

ii. Awards

- New Award
- Amendment
- Administrative Amendment
- No Cost Extension
- Fellowship
- Fellowship Modification
- Advance Spending Requests
- JPA
- JPA Amendment
- Post-Award Actions

Create issue

Project*
Health Sciences (HS)

Issue Type*
New Award

Some issue types are unavailable due to incompatible field configuration and/or workflow associations.

Priority
Medium

Summary*

Assignee
Automatic

[Assign to me](#)

Award Status
Please Select

In Progress Status

Award Type
Please Select

PI Name

PI Email

ePD Creator

Proposal Creator

ePD Creator Email

Proposal Creator Email

Project Title

Create issue

Configure fields ▼

Project*
Health Sciences (HS)

Issue Type*
Proposal

Some issue types are unavailable due to incompatible field configuration and/or workflow associations.

Priority
Medium

Summary*

Assignee
Automatic

[Assign to me](#)

Reporter
Ross Dammann

Start typing to get a list of possible matches.

PI Name

PI Email

Project Title

Lead Department

Organization Name

Organization Code

II. GETTING STARTED

a. Logging In

Before you proceed to review the steps for logging in, please consider the following tips:

Tip 1. If you have not logged in before or it has been awhile, click the “Can’t log in?” link that will display at the bottom portion of your screen, after following Step 2 on page 8 of this manual. Enter your email associated with your JIRA account on the subsequent page, and a recovery link will be sent to you with corresponding instructions on password resetting, etc.

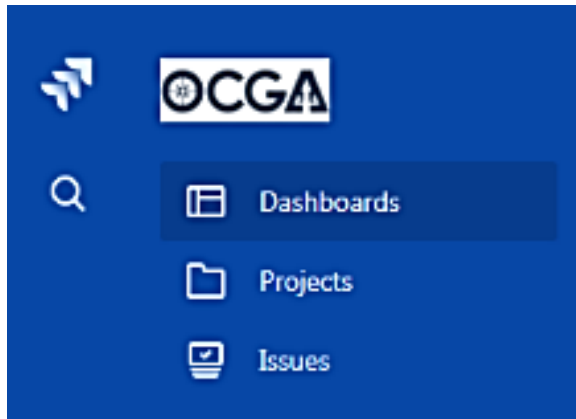
Tip 2. Please use Google Chrome as your default browser when working with the JIRA application. It is helpful to note this **before** logging in to the application.

Below, the steps for logging in are described in detail.

Step 1. Log on to

<https://ocgaucsd.atlassian.net/secure/Dashboard.jspa>.

Bookmark this link.



(a) Top left-hand corner of image (d).



(b) Bottom left-hand corner of image (d).

System dashboard

Introduction


Welcome to the Team Dashboard

(c) Top left-hand side of image (d).



(d) Complete image of dashboard.

Image Set 1. Screenshots of what should come up when you click on the above hyperlink.

Step 2. Click on the  icon, located at the bottom left-hand corner of the page. This is shown as the last icon in image (b) of Image Set 1 in this section.

Step 3. Enter the email associated with your JIRA cloud account.

Step 4. Click **Continue**.

Step 5. Enter password.

Step 6. Click **Log in**.

This concludes the steps for logging in.

b. Exploring the JIRA Dashboard

Below, the steps for accessing your My Workload dashboard are described in detail.

Step 1. If the My Workload dashboard does not automatically show up in the body of your JIRA application upon logging in, like so,

Secure | <https://ocgaucsd.atlassian.net/secure/Dashboard.jspa>

- Dashboards
- Projects
- Issues
- Settings
- Emails

NEW JIRA EXPERIENCE

- What has changed?
- Give feedback

My Workload

My Proposals

| T | Summary | Anticipated Award Type | Lead Department | ePD Creator Email | ePD Status | Proposal Deadline Date |
|---|---|------------------------|-----------------|-------------------|--------------------------|------------------------|
| P | Proposal - California State University Fullerton/Csu Fullerton Auxiliary Services / 00012843 / MACK | Sub-award Contract | Anesthesiology | | Ready for Officer Review | 02/14/2018 |

1-1 of 1

My Awards

| T | P | Summary | UCSD Proposal Number | Export Control | Conflict of Interest | Animal Subjects | Human Subjects | Due |
|---|---|--|----------------------|----------------|----------------------|-----------------|----------------|------------|
| A | ↑ | Award - National Science Foundation / 00011768 / AREFIEV, ALEXEY / 20182043 | 20182043 | Pending | Pending | | | 02/28/2018 |
| A | ↑ | Award - American Epilepsy Society / 00009767 / MUOTRI, ALYSSON R / 20180084 | 20180084 | | Pending | | Pending | |
| A | ↑ | Award - University Of Chicago / 00005738 / LI, SHENG / 20171561 | 20171561 | | Pending | | Pending | |
| A | ↑ | Award - National Science Foundation / 00005520 / MURPHY, THOMAS W / 20171531 | 20171531 | | Pending | | | |
| A | ↑ | Award - The Scripps Research Institute / 00002075 / GODINO, JOB / 20162946 | 20162946 | Pending | Pending | | | |
| A | ↓ | Award - Oregon State University / 00011062 / DORRESTEIN, PIETER C. / 20181515 | 20181515 | Pending | Pending | | | |
| A | ↑ | Award - Bill & Melinda Gates Foundation / 00010939 / Rogers, Thomas / 20182508 | 20182508 | | Pending | Pending | | |

1-7 of 7

My Calendar

All My Workload (Due Date)
February 2018

| Sun | Mon | Tue | Wed | Thur | Fri | Sat |
|-----|--------------|--------------|--------------|--------------|-----|-----|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | Issues: 1 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | Issues: 1 14 | Issues: 1 15 | 16 | 17 |
| 18 | Issues: 1 19 | Issues: 1 20 | Issues: 1 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | Issues: 1 28 | 1 | 2 | 3 |

Export in iCal format

My Workload

Issue Type
Total Issues: 8

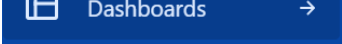
- New Award: 6
- Amendment: 1

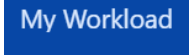
Image 2. Screenshot of a My Workload dashboard. Something similar to this should automatically display upon logging in. If it does *not* display, please follow the steps that appear after this image.

9

UC San Diego
OFFICE OF CONTRACT AND
GRANT ADMINISTRATION

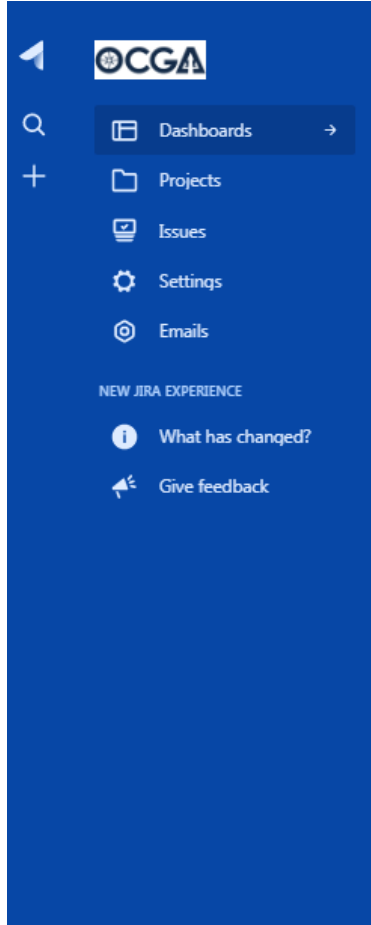
Step 1 (continued). Please follow the steps that continue after this step.

Step 2. Click the  icon that appears on the top left-hand side of the screen (also shown in Image 2, for your reference).

Step 3. Click the  icon that appears on the left-hand side of the screen.

Upon completion of these steps, you should be presented with your My Workload dashboard.

On the following dashboard, a detailed set of images of the different components of the My Workload dashboard similar to your own are presented, with call-outs of important information denoted on the images. This can be denoted as this manual's Image Set 3.



Title of My Workload Dashboard



My Workload

Your Proposals Section



| My Proposals | | | | | | | ... |
|--------------|---|---|------------------------|-----------------|-------------------|--------------------------|------------------------|
| T | P | Summary | Anticipated Award Type | Lead Department | ePD Creator Email | ePD Status | Proposal Deadline Date |
| | P | Proposal - California State University Fullerton/Csu Fullerton Auxiliary Services / 00012843 / MACK | Sub-award Contract | Anesthesiology | | Ready for Officer Review | 02/14/2018 |
| 1-1 of 1 | | | | | | | |

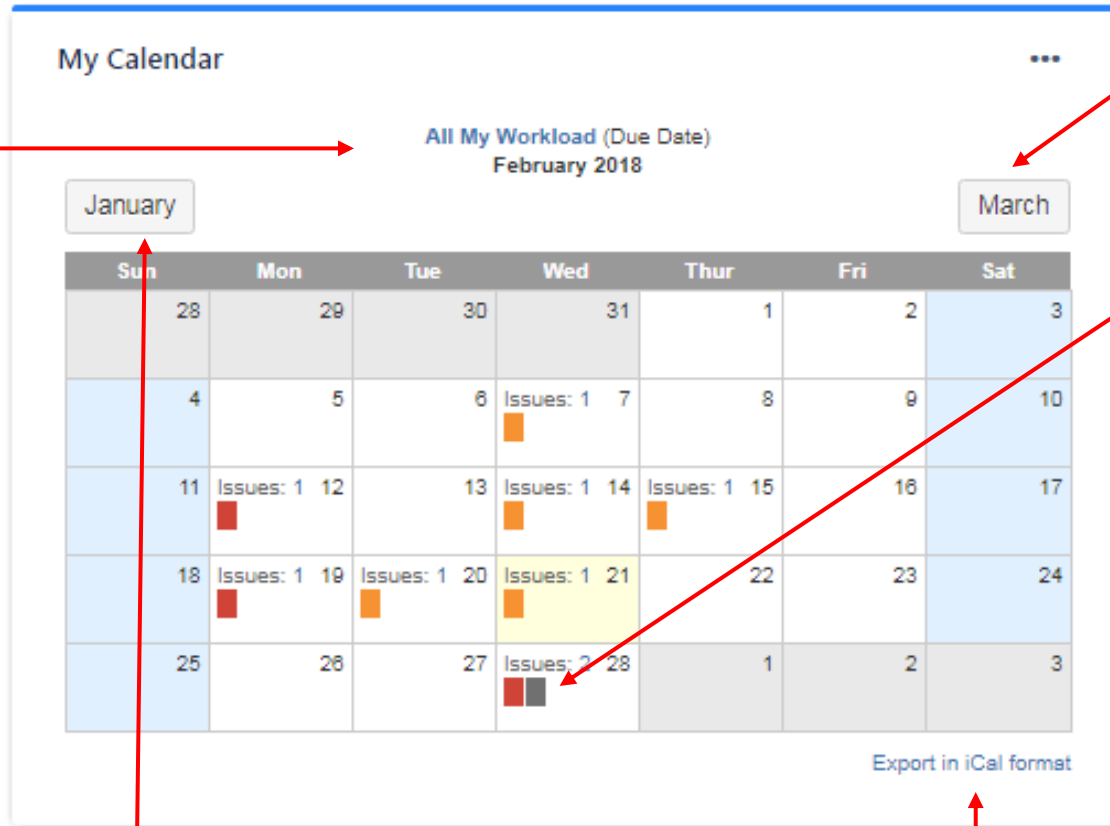
Your Awards Section



| My Awards | | | | | | | ... |
|-----------|---|--|----------------|----------------------|----------------|------------|----------------------|
| T | P | Summary | Export Control | Conflict of Interest | Human Subjects | Due | Award Status |
| A | ↑ | Award - National Science Foundation / 00011768 / AREFIEV, ALEXEY / 20182043 | Pending | Pending | | 02/28/2018 | Waiting for Response |
| A | ↑ | Award - American Epilepsy Society / 00009767 / MUOTRI, ALYSSON R / 20180084 | | Pending | Pending | 03/21/2018 | Needs Review |
| A | ↑ | Award - University Of Chicago / 00005738 / LI, SHENG / 20171561 | | Pending | Pending | 02/12/2018 | Waiting for Response |
| A | ↑ | Award - National Science Foundation / 00005520 / MURPHY, THOMAS W / 20171531 | | Pending | | 04/18/2018 | Active Negotiation |
| A | ↑ | Award - The Scripps Research Institute / 00002075 / GODINO, JOB / 20162946 | Pending | Pending | | 06/27/2018 | Please Select |
| A | ↓ | Award - Oregon State University / 00011062 / DORRESTEIN, PIETER C. / 20181515 | Pending | Pending | | 02/28/2018 | Active Negotiation |
| A | ↑ | Award - Bill & Melinda Gates Foundation / 00010939 / Rogers, Thomas / 20182508 | | Pending | | 05/09/2018 | Waiting for Response |
| 1-7 of 7 | | | | | | | |

Three Dots Feature (My Proposals): Can be used to maximize and minimize this window. Maximizing the window will expand it into a bigger view, and to return back to the original view, click “Restore.” Minimizing this window will raise up all its contents and not display anything but the title of the section. Click “Expand” to return to the original view.

All My Workload Hyperlink: Can be used to display all unresolved issues assigned to you with their due dates (if they have any specific due dates listed).



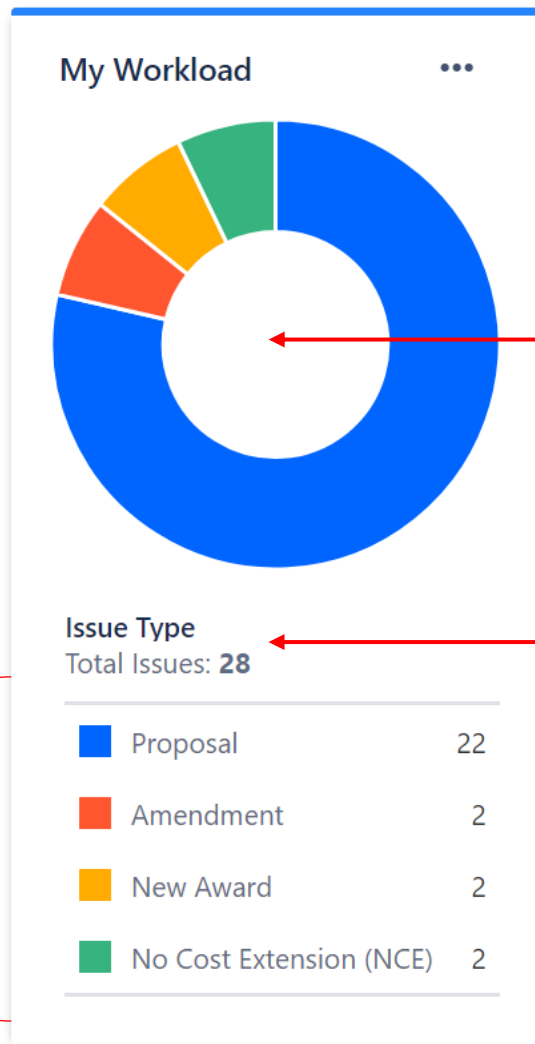
Link to Next Month

Date and number of issues due that day

Link to Previous Month's Calendar

iCal Export Link: Can be used to sync contents of this calendar with calendar

My Workload Pie Chart Legend: Can be used to see the corresponding categories of unresolved issues that need to be completed by you. You can click on the legend (e.g. 'Proposal' or 'Amendment') and it will take right to your list of issues.



My Workload Pie Chart: Contains colors that correspond to the legend and serves as a pictorial representation of the types of issues that constitute the biggest portions of your workload.

Total Number of Issues That Need to Be Resolved By You

Other Key Information

My Workload

| My Proposals | | | | | | | *** |
|--------------|---|------------------------|-----------------|-------------------|--------------------------|------------------------|-----|
| T | Summary | Anticipated Award Type | Lead Department | ePD Creator Email | ePD Status | Proposal Deadline Date | |
| P | Proposal - Pfizer Inc. / 00012995 / TOM, WYNNIS L. / | !Grant | Dermatology | | In Progress | 02/16/2018 | |
| P | Proposal - Duke University / 00012897 / TREMOULET, ADRIANA HERRERA / | Sub-award Contract | Pediatrics | | Ready for Officer Review | 08/05/2018 | |
| P | Proposal - Centers For Disease Control And Prevention / 00012577 / ZIVE, MICHELLE MURPHY / 20182729 | Contract | Pediatrics | | Submitted | 09/30/2017 | |
| P | Proposal - The Hospital For Sick Children / 00012220 / EICHENFIELD, LAWRENCE / | Sub-award Contract | Dermatology | | Under Department Review | 06/18/2018 | |

Proposal Summary

- P [Issue Type]
- Sponsor
- ePD Number
- PI Name
- UCSD Proposal Number

Other Key Information

| My Awards | | | | | ... | |
|-----------|---|--|----------------|----------------------|----------------|---------------------------------|
| T | P | Summary | Export Control | Conflict of Interest | Human Subjects | Award Status |
| A | ↑ | Award - National Science Foundation / 00011768 / AREFIEV, ALEXEY / 20182043 | Pending | Pending | | 02/28/2018 Waiting for Response |
| A | ↑ | Award - American Epilepsy Society / 00009767 / MUOTRI, ALYSSON R / 20180084 | | Pending | Pending | 03/21/2018 Needs Review |
| A | ↑ | Award - University Of Chicago / 00005738 / LI, SHENG / 20171561 | | Pending | Pending | 02/12/2018 Waiting for Response |
| A | ↑ | Award - National Science Foundation / 00005520 / MURPHY, THOMAS W / 20171531 | | Pending | | 04/18/2018 Active Negotiation |
| A | ↑ | Award - The Scripps Research Institute / 00002075 / GODINO, JOB / 20162946 | Pending | Pending | | 06/27/2018 Please Select |
| A | ↓ | Award - Oregon State University / 00011062 / DORRESTEIN, PIETER C. / 20181515 | Pending | Pending | | 02/28/2018 Active Negotiation |
| A | ↑ | Award - Bill & Melinda Gates Foundation / 00010939 / Rogers, Thomas / 20182508 | | Pending | | 05/09/2018 Waiting for Response |


Award Summary

- Award
- Sponsor
- ePD Number
- PI Name
- UCSD Proposal Number

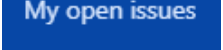
a. Your list of Issues

Your list of issues is your work (e.g. proposals and awards). There are a number of different ways you can find your issues, but we will be going over only one such way in this manual.

Below, the steps for accessing your complete list of issues are described in detail.

Step 1. Click on the magnifying glass  at the top left-hand corner of your screen. This is shown in image (a) of Image Set 1. This icon, along with the paper airplane icon above it and the “+” icon below it, is always shown at all times during the period you are working via your JIRA application.

Step 2. Click on the “View All Issues” text that appears at the bottom of the “Recent Issues” heading.

Step 3. Click the icon  on the left-hand side of your screen.


On the following pages, screenshots of the list of issues that will appear, similar to your screen, are shown. Call-outs denoting important information on the screenshots are also provided. This can be denoted as this manual’s Image Set 4.

Search

Save as

Filter your Search

Project: All ▼ Type: All ▼ Status: All ▼ Assignee: All ▼ Contains text More ▼ Q Advanced

1-50 of 624 

| T | Key | P | Assignee | Project |
|---|---------|---|--------------|-----------------|
| P | HS-386 | | Frank Truong | Health Sciences |
| P | HS-1566 | ↑ | Frank Truong | Health Sciences |
| A | HS-1564 | ↑ | Frank Truong | Health Sciences |
| P | HS-492 | | Frank Truong | Health Sciences |
| A | HS-1565 | ↑ | Frank Truong | Health Sciences |
| A | HS-1563 | ↑ | Frank Truong | Health Sciences |
| A | HS-1562 | ↑ | Frank Truong | Health Sciences |
| P | HS-1252 | | Ross Dammann | Health Sciences |
| P | HS-458 | | Frank Truong | Health Sciences |
| P | HS-486 | | Frank Truong | Health Sciences |

Click on
'Issue Key'
to go to
Issue

Search [Save as](#)

Project: All ▾ Type: All ▾ Status: All ▾ Assignee: All ▾ More ▾ [Advanced](#)

1-50 of 624 [G](#)

Sort Issues

| T | Key | P | Assignee | Project |
|---|---------|---|--------------|-----------------|
| P | HS-386 | | Frank Truong | Health Sciences |
| P | HS-1566 | ↑ | Frank Truong | Health Sciences |
| A | HS-1564 | ↑ | Frank Truong | Health Sciences |
| P | HS-492 | | Frank Truong | Health Sciences |
| A | HS-1565 | ↑ | Frank Truong | Health Sciences |
| A | HS-1563 | ↑ | Frank Truong | Health Sciences |
| A | HS-1562 | ↑ | Frank Truong | Health Sciences |
| P | HS-1252 | | Ross Dammann | Health Sciences |
| P | HS-458 | | Frank Truong | Health Sciences |
| P | HS-486 | | Frank Truong | Health Sciences |

Export or Email List [↗](#) [📄](#) [⋮](#)

Detailed List [≡](#) ▾

Add
more
fields
to your
list

Columns ▾

Columns

[My Defaults](#)

[Q](#)

[Restore defaults](#)

- ☒ Assignee
- ☒ Issue Type
- ☒ Key
- ☒ Priority
- ☒ Project
- ☐ Activity Type
- ☐ Affects Version/s

[Done](#) [Cancel](#)

Exercises:

- 1. Add a new field to your search list and create a custom saved search (e.g. Frank's Issues).**
- 2. Search for all proposals for INSEL, PAUL**
- 3. How many proposals are there being submitted to UC Tobacco Program?**
- 4. What is the ePD Status for ePD Number 13108?**
- 5. How many proposals are submitted in ePD, but not yet finalized in IP?**

III. WORKING WITH ISSUES

a. View / Edit / Update an Issue (In Full View)

Each issue is considered a 'work unit'. Each unit has corresponding fields associated to it.

Each issue type has a list of fields that either are required for processing or assist with the management of the work unit. The list of fields for each Issue Type are listed in the appendix – Table C.

On the following pages, screenshots of a sample issue, in its full view for a proposal issue.

PAGE INTENTIONALLY LEFT BLANK

Project

Health Sciences

Issue Key

HS-492

Return to search
or go to next issue

1 of 621

Return to search

Summary

Proposal - Abbott Laboratories (Incl Perclose) / 00012058 / CHAKRAVARTHY, KRISHNAN V. /

Update Issue

Edit

Comment

Assign

Start Progress

Done

Update Status

Type:

Issue Type

P Proposal

Status:

TO DO

(View workflow)

Resolution:

Unresolved

Fields and values populated from ePD

Labels:

None

PI Name:

CHAKRAVARTHY, KRISHNAN V.

Project Title:

DRG stimulation for the treatment of phantom limb pain and co-morbid inflammatory conditions through modification of immunological microenvironment

Lead Department:

Anesthesiology

Organization Name:

Anesthesiology

Organization Code:

414909

Anticipated Award Type:

PI Initiated Clinical Trial (OCGA)

Activity Type:

Clinical Research

UCSD Proposal Type:

!New

Service Line:

PI Initiated Clinical Trial

Who's assigned?

Add Watchers

Key Dates

Assignee:

Frank Truong

Reporter:

Anonymous

Watchers:

1 Stop watching this issue

Created:

02/09/2018

Updated:

3 days ago

ePD Create Date:

12/06/2017

Start Date:

02/01/2018

End Date:

01/31/2019

Proposal Deadline Date:

12/14/2017

Checklist

Create your own checklist

**Proposal - Abbott Laboratories (Incl Perclose) / 00012058 /
CHAKRAVARTHY, KRISHNAN V. /**[Edit](#) [Comment](#) [Assign](#) [Start Progress](#) [Done](#)[Share](#) [Email](#) [Download](#) [More](#)

Service Line: PI Initiated Clinical Trial
Sponsor Name: Abbott Laboratories (Incl Perclose)
Sponsor Code: 8004
Foreign Sponsor: No
Sponsor Country Code: USA
Direct Cost: 150,000
Indirect Cost: 45,000
Total Cost: 195,000
ePD Number: 00012058
ePD Creator: BOYD, YOLANDA
ePD Status: Under Department Review
ePD URL: <https://epd.ucsd.edu/coeus/getGeneralInfo.do?proposalNumber=00012058>
ePD Proposal Analyst: TRUONG, FRANCIS KY
Clinical Trials - Other: Yes

Checklist[More](#)
Type ToDo item or separator text here...

**ePD Status In Progress / Under Department Review / At
Your Stop / Submitted**

Go directly to ePD Record

**Proposal - Abbott Laboratories (Incl Perclose) / 00012058 /
CHAKRAVARTHY, KRISHNAN V. /**

[Edit](#) [Comment](#) [Assign](#) [Start Progress](#) [Done](#)

[Share](#) [Email](#) [Download](#) [More](#)

Conflict of Interest: Pending


Human Subjects: Pending

Description

Click to add description

Add a Description

Attachments

 Drop files to attach, or [browse](#).

Attach Documents

Activity

[All](#) [Comments](#) [History](#) [Activity](#) [Emails](#)

▼  [Frank Truong](#) added a comment - 02/09/2018

call Yolanda about this

[Comment](#)

Add notes or comments

**Send an email to other officers or
notes to yourself.**

b. Attachments

For this section, we will be using issue HS-492 on our JIRA application as our starting point. Through using this issue as our base point, you will learn how to use two integral features that can be used to attach files to an issue.

i. Drag & Drop

Below, the steps for using the drag and drop feature are described in detail.

Step 1. Note the “Drop files to attach” portion of the “Drop files to attach, or browse” text, shown in the third image of Image Set 5. In order to “drop files to attach” into this section, you must use the left cursor of your mouse to press and hold a file that you want to attach, and drag it into the confines of this space, shown in the third image of Image Set 5. This can be done with files on your computer. Consider the following image:

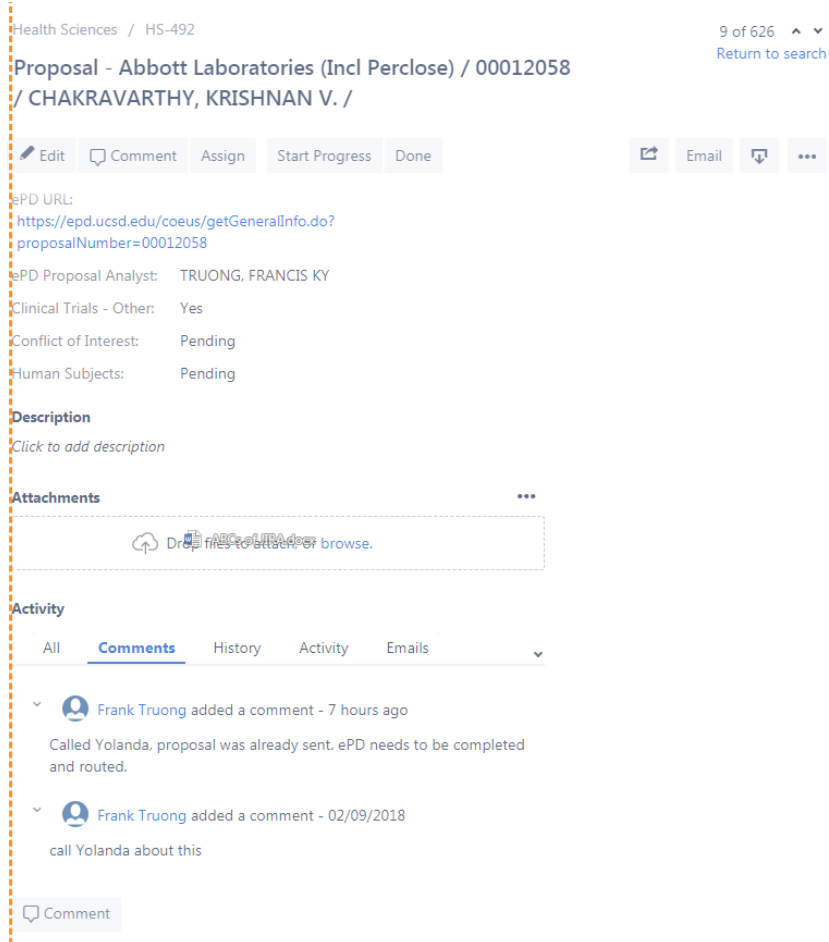


Image 6. Screenshot of the image that comes up after being in the process of dragging and dropping a file into the confines of the space described previously. The confines of the space are denoted with the dotted orange border.

Now, let us consider some notes on the drag and drop tool:

- ✓ You cannot drag and drop a file from Outlook directly to an issue. You will need to save it to your desktop. However, the OTJ (Outlook-to-JIRA) function allows you to create an issue and copy the attachment to an issue. (How to use this is explained later in the manual.)

ii. Browse & Attach

Below, the steps for using the browse and attach feature are described in detail.

Step 1. Scroll down the issue's full view page, until you see the "Drop files to attach, or browse" text, shown in the third image of Image Set 5. Click the hyperlink that is attached to the text "browse," which should be denoted with a blue text color, as exemplified by the third image of Image Set 5.

Step 2. Upon clicking the "browse" link, you are provided with the following options.

- ✓ You can upload a document from your computer by clicking the section in the middle of the pop-up screen that says "Upload a file."

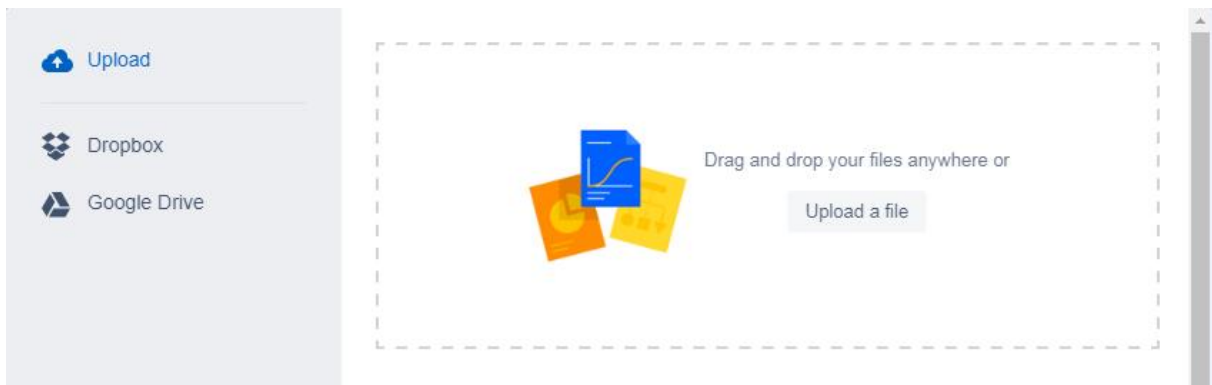


Image 7. Screenshot of the image that comes up after clicking the "browse" hyperlink.

Now, let us consider some notes on the drag and drop AND the browse and attach tools:

- ✓ You can attach more than one file at a time. For example, upon clicking the “Upload a file” section in the pop-up screen shown in Image 6, make sure to hold the “Ctrl” key down on your keyboard and select all the files that you want to be incorporated into the issue with your mouse cursor. The documents you have chosen will appear at the bottom of the op-up window, highlighted in blue (similar to the image below):

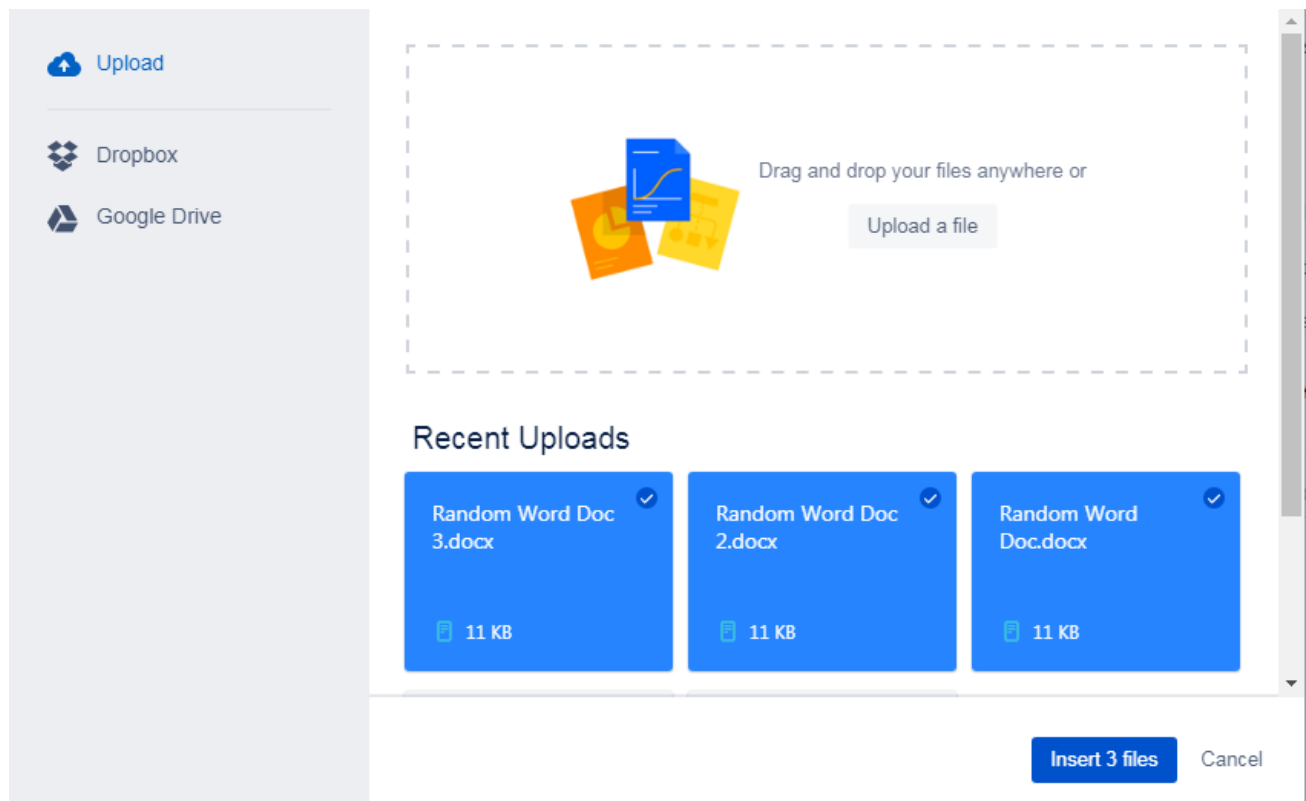


Image 8. A depiction of selecting multiple files from your computer to be inserted into the issue at hand.

- ✓ You can de-select a file in an issue, after attaching it:

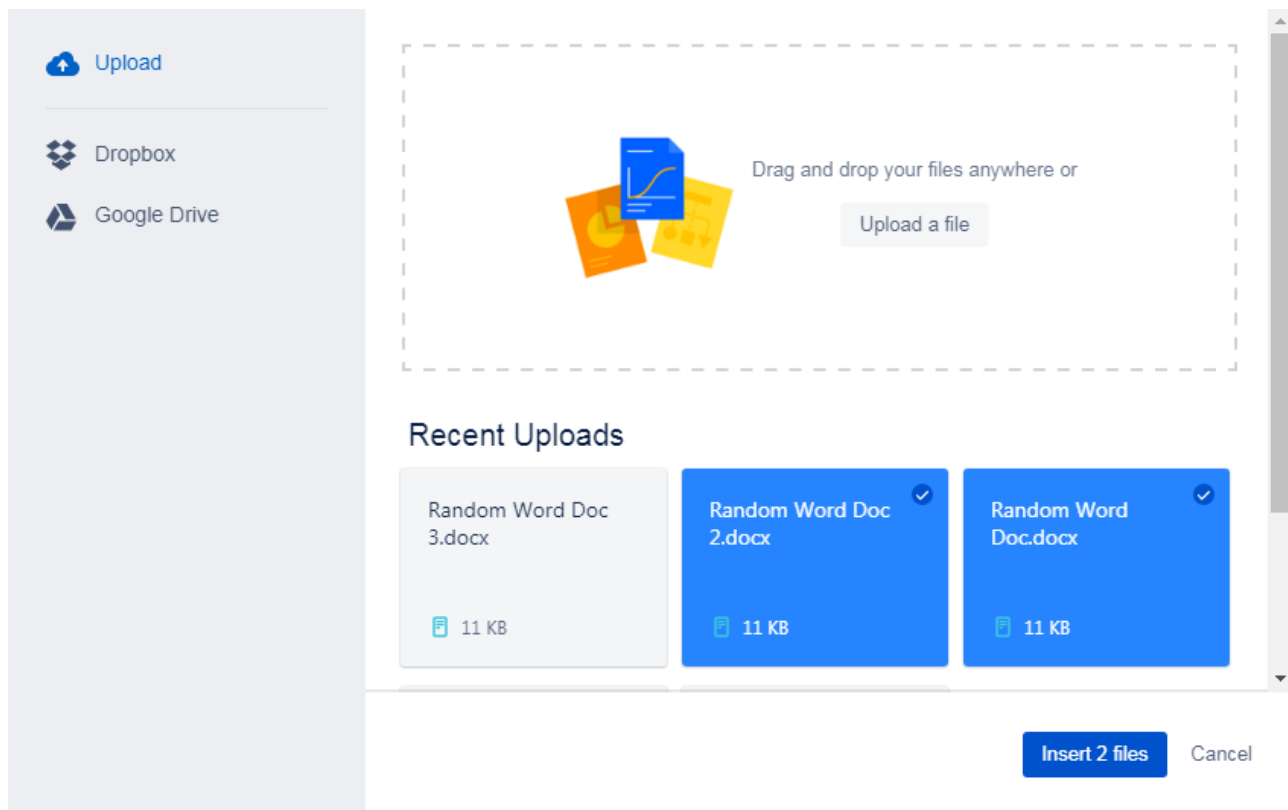


Image 9. A depiction of de-selecting a file that was initially attached an issue, if you mistakenly attached it.

- ✓ The maximum size for any one file is 10 MB, but this can be customized for our organization.

This concludes the steps for using the drag and drop and browse and attach features.

c. Checklists

Rapidly see, from the issue detail view, the status of the checklist along with which items are checked and which ones are not.

To add a check list item:

1. Enter the details into the line and click the check mark.

Checklist

Completion: 0 / 2

Solicitation

- ☐ Complete proposal application
- ☐ Budget

Health Sciences / HS-492

1 of 621
[Return to search](#)

Proposal - Abbott Laboratories (Incl Perclose) / 00012058 / CHAKRAVARTHY, KRISHNAN V. /

Edit Comment Assign Start Progress Done

Email

Service Line: PI Initiated Clinical Trial
Sponsor Name: Abbott Laboratories (Incl Perclose)
Sponsor Code: 8004
Foreign Sponsor: No
Sponsor Country Code: USA
Direct Cost: 150,000
Indirect Cost: 45,000
Total Cost: 195,000
ePD Number: 00012058
ePD Creator: BOYD, YOLANDA
ePD Status: Under Department Review
ePD URL: <https://epd.ucsd.edu/coeus/getGeneralInfo.do?proposalNumber=00012058>
ePD Proposal Analyst: TRUONG, FRANCIS KY
Clinical Trials - Other: Yes

Checklist

Type ToDo item or separator text here...

Exercises:

- 1. Update the Assignee on your issue. Use the person next to you.**
- 2. Add an attachment to your issue**
- 3. Make an internal comment to yourself**
- 4. Use the @mention to email someone. Use the person next to you.**
- 5. Create a new checklist and save as a template to be used again.**

IV. WORKING WITH BOARDS

a. Workflows

JIRA workflow comprises the following statuses (To Do → In Progress → Proposal Submitted → Award Setup → Done). To move an issue (e.g. work unit or card) from one status to another, simply click and drag the issue to the appropriate column.

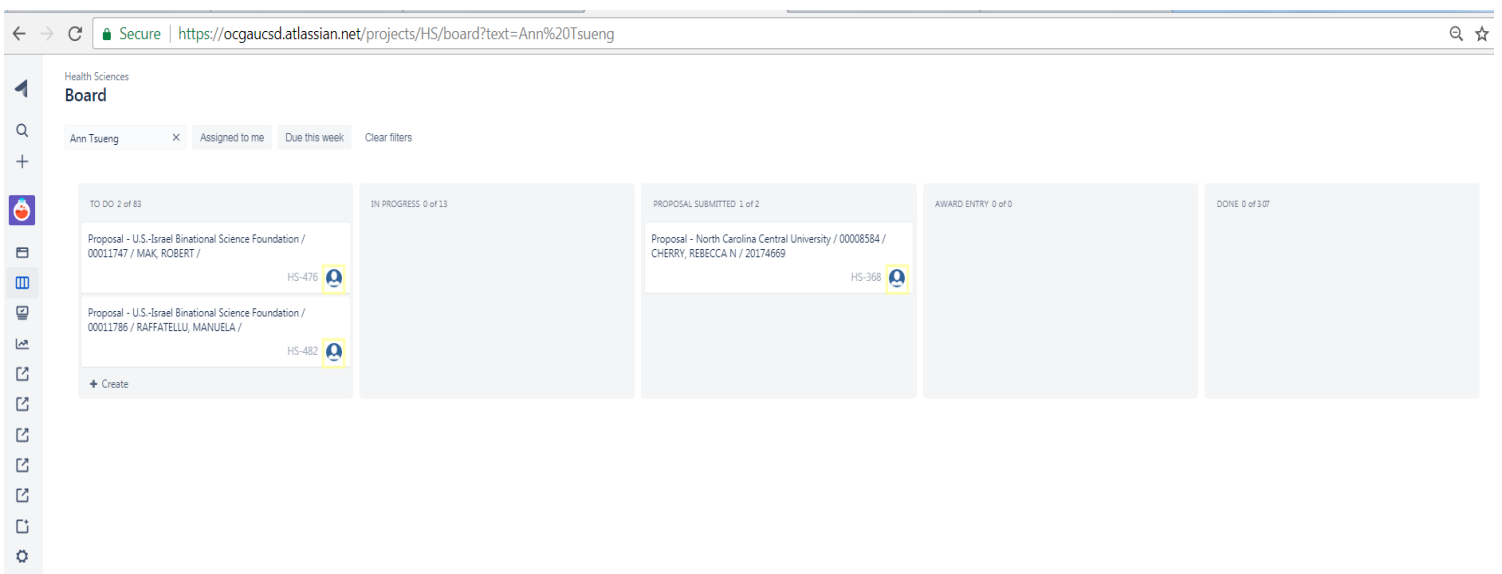
b. Quick Filters and Counts

At the top of the board, you will see a search box, “Assigned to me”, and “Due this week” quick filters.

Within the search box, you can search for [].

The ‘Assigned to me’ will only return records that are yours.

The ‘Due this week’ filter will retrieve records due this week and that were due in the past.

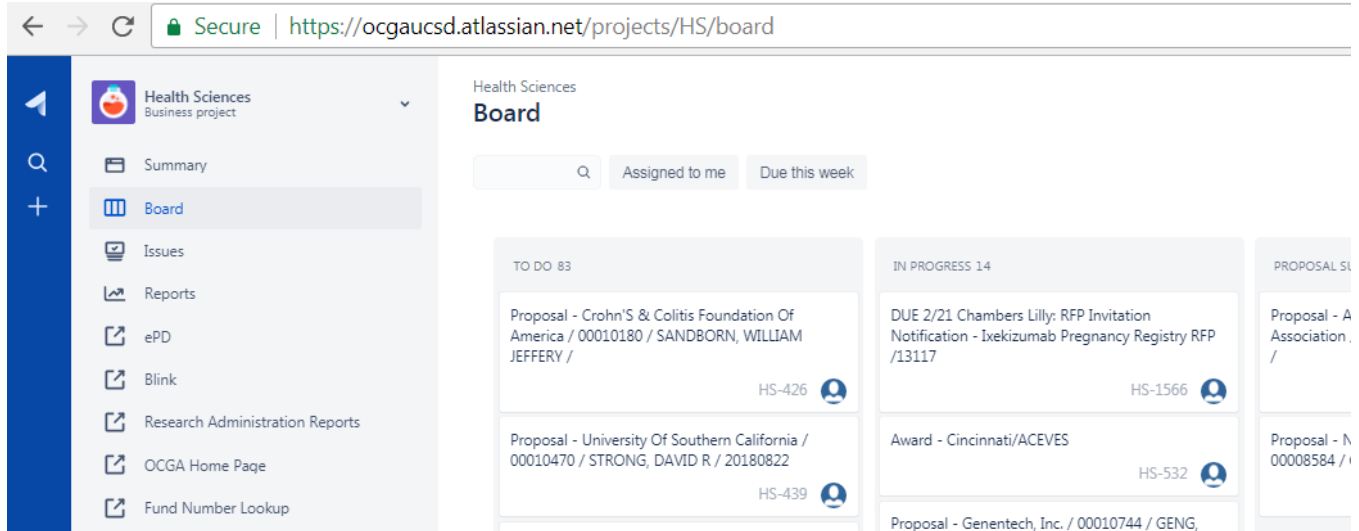


c. Quick Links

On the right side of your ‘Board’ you will notice some quick links.

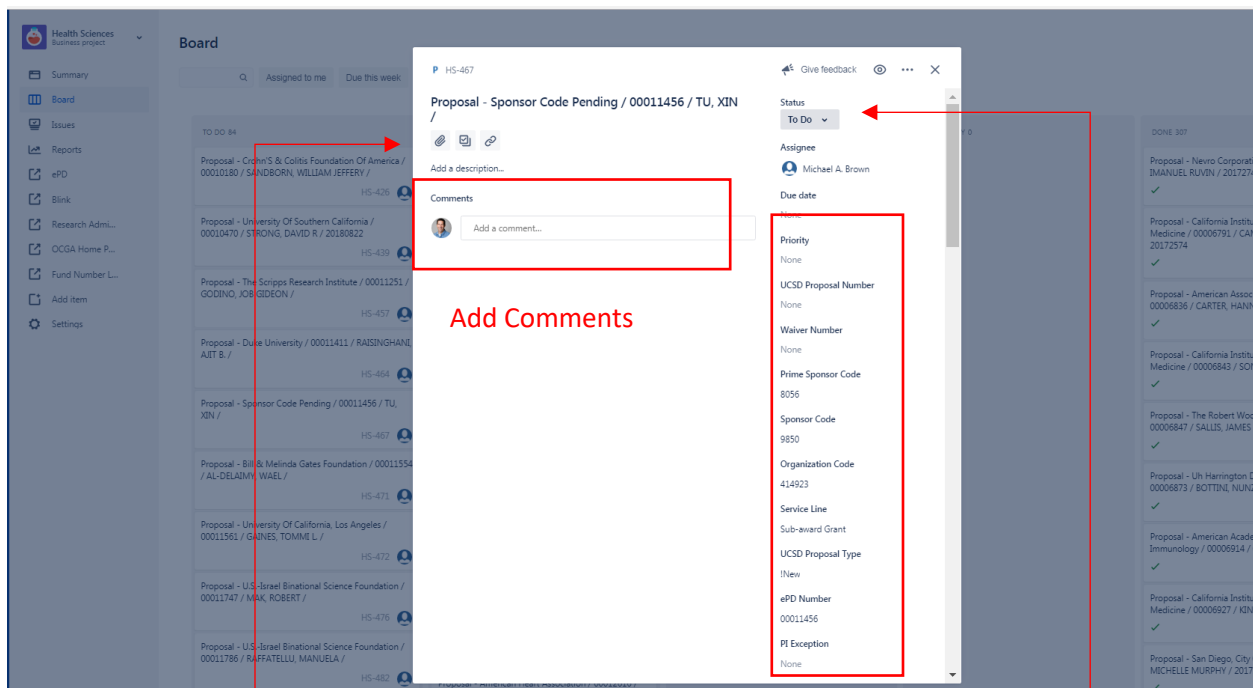
- ePD

- Blink
- Research Administration Reports
- OCGA Home Page
- Fund Number Lookup



d. Quick View

The Quick View from the Board makes it easier for you to quickly view, edit, and move on.



Quick Add Buttons: Add attachments, create subtasks, and link issues

Update Issue

Transition Issues

V. APPENDIX

a. Keyboard shortcuts

Global shortcuts

Quick search: **/**
Close drawer: **Esc**
Create issue: **c**
Keyboard shortcuts: **?**
Find issues: **g** then **i**
Browse to a project: **g** then **p**
Toggle sidebar: **[**

Navigating issues

View selected issue: **o** or **Enter**
Next issue: **j**
Previous issue: **k**
Toggle issue fullscreen: **z**
Dock/undock the filters
panel: **[**
Next activity: **n**
Previous activity: **p**
Focus search field: **f**
Search for issues: **u**
Switch filter view: **t**
Detail view order by: **y**

Issue actions

Edit issue: **e**
Assign issue: **a**
Comment on issue: **m**
Share issue: **s**
Edit issue labels: **l**
Jump to fields for
editing: **,**
Assign to me: **i**

Close

b. Email Notifications

Initial Email

Hi [Fund Manager],

OCGA received notification that PI [PI Name] intends to submit a proposal package to [Sponsor Name].

Your OCGA analyst will be **[Officer Name]**

Lead Unit:
Proposal Number:
Sponsor:
Prime Sponsor:
Deadline Date:
Title:

Please send your analyst, copied on this email, the draft proposal when it is ready for review. If the proposal is in an online system, please notify your analyst via email that the proposal is ready for review in the system.

Your analyst will be ready to review your proposal if there is adequate time to review prior to the deadline date and when the following are complete:

1. Upload a final draft application under the Complete Proposal Application. At minimum this should include a statement of work, budget, and, if applicable, a budget justification;
2. Upload the most current proposal solicitation or funding opportunity number, if applicable;
3. Subrecipient proposal packages, if applicable; and
4. If you require a new sponsor code please provide 1) the sponsor name; 2) address; and 3) website address in the Abstract Tab - Internal Comments section. Please select sponsor code 9850.

If copying a prior proposal please review and confirm all information is updated and correct.

An ePD record is not required for letters of intent.

The deadline for grants and subaward grants is four (4) working days prior to the published deadline. The deadline for contracts and subaward contracts is five (5) working days prior to the published deadline. For more information regarding OCGA timely submission of proposals please visit: <http://blink.ucsd.edu/research/preparing-proposals/proposal-development/timely.html>

For additional information about OCGA's proposal process please visit
<http://blink.ucsd.edu/sponsor/ocga/index.html>

You can view this proposal through CoeusLite at the following address:

Regards,

Office of Contract and Grant Administration

Proposals 'At Your Stop'

Issue Subscription

Filter: [My Proposal - Ready for Officer Review \(2 issues\)](#)

This email is to notify you when an ePD is at your stop for review.

Subscriber: rdammann

| T | Summary | P | Anticipated Award Type | ePD Status | PI Name | Lead Department | ePD Number | Sponsor Name | Prime Sponsor Name | Due | ePD Creator | ePD Creator Email | ePD URL |
|---|--|---|------------------------|----------------|-----------------|---------------------------------|------------|-----------------------------------|---|------------|--------------|--|---|
| P | The Chopra Foundation / 00010050 / MILLS, PAUL J | | IGrant | Officer Review | MILLS, PAUL J | Family Medicine & Public Health | 00010050 | The Chopra Foundation | | 08/15/2017 | SCOTT, KEIKO | kescott@ucsd.edu | https://epd.ucsd.edu/coeus/getGeneralInfo.do?proposalNumber=00010050 |
| P | University Of Southern California / 00010470 / STRONG, DAVID R | | Sub-award Grant | Officer Review | STRONG, DAVID R | Family Medicine & Public Health | 00010470 | University Of Southern California | UC TOBACCO-RELATED DISEASE RESEARCH PROGRAM | 09/18/2017 | SCOTT, KEIKO | kescott@ucsd.edu | https://epd.ucsd.edu/coeus/getGeneralInfo.do?proposalNumber=00010470 |

You may edit this subscription [here](#).

c. Issue Types and Fields

| Proposal | Type | New Award | Copied from Proposal | Amendment | Copied from Proposal | Admin Amendment | Copied from Proposal | Advanced Spending | Copied from Proposal |
|----------------------------|------------------|----------------------------|----------------------|----------------------|----------------------|--------------------|----------------------|----------------------|----------------------|
| Priority | Optional | Priority | Optional | Priority | Optional | Priority | Optional | Priority | Optional |
| Summary | Auto | Summary | Yes | Summary | Yes | Summary | Yes | Summary | Yes |
| Assignee | Manually Entered | Issue Type | No | Issue Type | No | Issue Type | No | Issue Type | No |
| Reporter | Manually Entered | Assignee | No | Assignee | No | Assignee | No | Assignee | No |
| Issue Type | Auto | Award Status | No | Award Status | No | Award Status | No | Award Status | No |
| PI Name | Auto | Award Type | Yes | Amendment/Modif | No | Amendment/Modific | No | Award Type | Yes |
| PI Email | Auto | PI Name | Yes | Award Transaction | No | PI Name | Yes | PI Name | Yes |
| Project Title | Auto | PI Email | Yes | PI Name | Yes | PI Email | Yes | PI Email | Yes |
| Lead Department | Auto | ePD Creator | Yes | PI Email | Yes | UCSD Proposal Num | Yes | ePD Creator | Yes |
| Organization Name | Auto | ePD Creator Email | Yes | ePD Creator | Yes | Fund Number | No | ePD Creator Email | Yes |
| Organization Code | Auto | Project Title | Yes | ePD Creator Email | Yes | Sub Fund | No | Project Title | Yes |
| UCSD Proposal Number | Auto | UCSD Proposal Number | Yes | UCSD Proposal Nu | Yes | Sponsor Name | Yes | UCSD Proposal Num | Yes |
| Anticipated Award Type | Auto | Lead Department | Yes | Fund Number | No | Sponsor Code | Yes | Fellow/PA Name | No |
| Activity Type | Auto | Organization Name | Yes | Sub Fund | No | Prime Sponsor Name | Yes | Fund Number | No |
| UCSD Proposal Type | Auto | Organization Code | Yes | Sponsor Award Nu | No | Prime Sponsor Code | Yes | Sub Fund | No |
| Service Line | Auto | Sponsor Award Number | No | Sponsor Name | Yes | Date Received | No | Sponsor Award Nu | No |
| Sponsor Name | Auto | Sponsor Name | Yes | Sponsor Code | Yes | Due Date | No | Authorized Amount | No |
| Sponsor Code | Auto | Sponsor Code | Yes | Foreign Sponsor | Yes | Description | No | Sponsor Name | Yes |
| Foreign Sponsor | Auto | Foreign Sponsor | Yes | Sponsor Country C | Yes | | | Sponsor Code | Yes |
| Sponsor Country Code | Auto | Sponsor Country Code | Yes | Prime Sponsor Nam | Yes | | | Foreign Sponsor | Yes |
| Prime Sponsor Name | Auto | Prime Sponsor Name | Yes | Prime Sponsor Cod | Yes | | | Sponsor Country Co | Yes |
| Prime Sponsor Code | Auto | Prime Sponsor Code | Yes | Foreign Prime Spon | Yes | | | Prime Sponsor Nam | Yes |
| Foreign Prime Sponsor | Auto | Foreign Prime Sponsor | Yes | Prime Sponsor Cou | Yes | | | Prime Sponsor Cod | Yes |
| Prime Sponsor Country C | Auto | Prime Sponsor Country C | Yes | Start Date | No | | | Foreign Prime Spon | Yes |
| IDC Rate | Auto | Start Date | No | End Date | No | | | Prime Sponsor Cou | Yes |
| Direct Cost | Auto | End Date | No | IDC Rate | Yes | | | IDC Rate | Yes |
| Indirect Cost | Auto | IDC Rate | Yes | Waiver Number | No | | | Waiver Number | No |
| Total Cost | Auto | Waiver Number | No | Direct Cost | No | | | Effective Date | No |
| Waiver Number | Manually Entered | Direct Cost | No | Indirect Cost | No | | | End Date | No |
| ePD Number | Auto | Indirect Cost | No | Total Cost | No | | | CFDA Number | No |
| ePD Creator | Auto | Total Cost | No | Conflict of Interest | Yes | | | Organization Code | Yes |
| ePD Creator Email | Auto | OP Source Code | No | Conflict of Interest | No | | | OP Source Code | No |
| ePD Create Date | Auto | CFDA Number | No | Conflict of Interest | No | | | Property Title | No |
| ePD Status | Auto | Property Title | No | Animal Subjects | Yes | | | Conflict of Interest | Yes |
| ePD URL | Auto | Conflict of Interest | Yes | Human Subjects | Yes | | | Conflict of Interest | No |
| ePD Proposal Analyst | Auto | Conflict of Interest Assig | No | Export Control | Yes | | | Conflict of Interest | No |
| Start Date | Auto | Conflict of Interest Form | No | Export Control Assi | No | | | Human Subjects | Yes |
| End Date | Auto | Animal Subjects | Yes | Notify Environmen | No | | | Animal Subjects | Yes |
| Proposal Deadline Date | Auto | Human Subjects | Yes | PI Exception | Yes | | | Export Control | Yes |
| Proposal Submission Dat | Manually Entered | Export Control | Yes | Date Received | No | | | Export Control Assi | No |
| Funding Opportunity Nu | Auto | Export Control Assignee | No | Due Date | No | | | PI Exception | Yes |
| Clinical Trials (NIH Only) | Auto | Notify Environment, Hea | No | Description | No | | | Date Received | No |
| Clinical Trials - Other | Auto | PI Exception | Yes | | | | | Due Date | No |
| Conflict of Interest | Auto | Check All that are Applic | No | | | | | Description | No |
| Animal Subjects | Auto | Clinical Trials (NIH Only) | Yes | | | | | | |
| Human Subjects | Auto | Clinical Trials - Other | Yes | | | | | | |
| Export Control | Auto | Date Received | No | | | | | | |
| Notify Environment, Hea | Auto | Due Date | No | | | | | | |
| PI Exception | Auto | Description | No | | | | | | |
| Due Date | Manually Entered | | | | | | | | |
| Sponsor Proposal ID | Manually Entered | | | | | | | | |
| IP Status | Auto | | | | | | | | |
| Description | Manually Entered | | | | | | | | |

| New Fellowship | Copied from Proposal | Fellowship Amendment | Copied from Proposal | New VPA/VAIPA | Copied from Proposal | VPA/VAIPA Amendment | Copied from Proposal | No Cost Extension(NCE) | Copied from Proposal |
|------------------------|----------------------|----------------------|----------------------|--------------------|----------------------|------------------------|----------------------|------------------------|----------------------|
| Priority | Optional | Priority | Optional | Priority | Optional | Priority | Optional | Priority | Optional |
| Summary | No | Summary | No | Summary | No | Summary | No | Summary | Yes |
| Issue Type | No | Issue Type | No | Issue Type | No | Issue Type | No | Issue Type | No |
| Assignee | No | Assignee | No | Assignee | No | Assignee | No | Assignee | No |
| Award Status | No | Award Status | No | Award Status | No | Award Status | No | Award Status | No |
| PI Name | No | PI Name | No | PI Name | No | Amendment/Modificati | No | Amendment/Modifi | No |
| Fellow/PA Name | No | Fellow/PA Name | No | PI Name | No | Award Transaction Type | No | PI Name | Yes |
| Project Title | No | Project Title | No | Fellow/PA Name | No | PI Name | No | UCSD Proposal | No |
| Sponsor Award Nu | No | Fund Number | No | Project Title | No | Fellow/PA Name | No | Fund Number | No |
| Sponsor Name | No | Sub Fund | No | Sponsor Award | No | Project Title | No | Sponsor Name | Yes |
| Sponsor Code | No | Sponsor Award Nu | No | Sponsor Name | No | Fund Number | No | Sponsor Code | Yes |
| Foreign Sponsor | No | Sponsor Name | No | Sponsor Code | No | Sub Fund | No | Foreign Sponsor | Yes |
| Sponsor Country Co | No | Sponsor Code | No | Prime Sponsor | No | Sponsor Award Number | No | Sponsor Country | Yes |
| Prime Sponsor Nam | No | Foreign Sponsor | No | Prime Sponsor Code | No | Sponsor Name | No | Prime Sponsor | Yes |
| Prime Sponsor Cod | No | Sponsor Country C | No | Start Date | No | Sponsor Code | No | Prime Sponsor Code | Yes |
| Foreign Prime Spon | No | Prime Sponsor Na | No | End Date | No | Prime Sponsor Name | No | Foreign Prime | Yes |
| Prime Sponsor Cou | No | Prime Sponsor Co | No | IDC Rate | No | Prime Sponsor Code | No | Prime Sponsor | Yes |
| Start Date | No | Foreign Prime Spo | No | Direct Cost | No | Start Date | No | End Date | No |
| End Date | No | Prime Sponsor Co | No | Indirect Cost | No | End Date | No | Conflict of Interest | Yes |
| IDC Rate | No | Start Date | No | Total Cost | No | IDC Rate | No | Conflict of Interest | No |
| Waiver Number | No | End Date | No | CFDA Number | No | Direct Cost | No | Conflict of Interest | No |
| Direct Cost | No | IDC Rate | No | Organization Code | No | Indirect Cost | No | Animal Subjects | Yes |
| Indirect Cost | No | Direct Cost | No | OP Source Code | No | Total Cost | No | Human Subjects | Yes |
| Total Cost | No | Indirect Cost | No | Date Received | No | Organization Code | No | Export Control | Yes |
| CFDA Number | NA | Total Cost | No | Due Date | No | Date Received | No | Export Control | No |
| Organization Code | No | Organization Code | No | Description | No | Due Date | No | PI Exception | Yes |
| OP Source Code | No | Conflict of Interest | No | | | Description | No | Date Received | No |
| Property Title | No | Conflict of Interest | No | | | | | Due Date | No |
| Conflict of Interest | NA | Conflict of Interest | No | | | | | Description | No |
| Conflict of Interest | No | Animal Subjects | No | | | | | | |
| Conflict of Interest | No | Human Subjects | No | | | | | | |
| Animal Subjects | No | Export Control | No | | | | | | |
| Human Subjects | No | Export Control Ass | No | | | | | | |
| Export Control | No | PI Exception | No | | | | | | |
| Export Control Assi | No | Date Received | No | | | | | | |
| Notify Environment | No | Due Date | No | | | | | | |
| PI Exception | No | Description | No | | | | | | |
| Check All that are A | No | | | | | | | | |
| Clinical Trials (NIH O | No | | | | | | | | |
| Clinical Trials - Othe | No | | | | | | | | |
| Date Received | No | | | | | | | | |
| Due Date | No | | | | | | | | |
| Description | No | | | | | | | | |

| Post Submission Action(JIT) | Copied from Proposal | Post Award Actions | Copied from Proposal |
|--------------------------------|-------------------------|----------------------|-------------------------|
| Priority | Optional | Priority | Optional |
| Summary | Yes | Summary | No |
| Issue Type | No | Issue Type | No |
| Assignee | No | Assignee | No |
| PI Name | Yes | Award Status | Yes |
| ePD Number | Yes | PI Name | No |
| UCSD Proposal Number | Yes | UCSD Proposal Number | Yes |
| Sponsor Proposal ID | No | Fund Number | No |
| Sponsor Name | Yes | Sponsor Name | Yes |
| Sponsor Code | Yes | Sponsor Code | Yes |
| Prime Sponsor Name | Yes | Prime Sponsor Name | Yes |
| Prime Sponsor Code | Yes | Prime Sponsor Code | Yes |
| Start Date | No | Start Date | No |
| End Date | No | End Date | No |
| Direct Cost | No | Direct Cost | No |
| Indirect Cost | No | Indirect Cost | No |
| Total Cost | No | Total Cost | No |
| Date Received | No | Date Received | No |
| Due Date | No | Due Date | No |
| Description | No | Description | No |