# Table of Contents

Logging into JIRA .......................................................... 1  
First-time setup .......................................................... 1

Creating a Curriculum Proposal in JIRA ................................. 2  
Creating an Issue .......................................................... 2

College Review ...................................................................... 5

Submitting a Proposal for 15-Day Review ................................. 8  
Beginning 15-Day Review .................................................. 8  
15-Day Review by University Community and Governance Staff ........ 10

After 15-Day Review Concludes ............................................. 12

Processing Revisions .......................................................... 12

Browsing Proposals ............................................................ 14

Governance Office Staff Contacts ......................................... 17
JIRA is a workflow application used to track curriculum proposals through the governance process. JIRA treats every item as an “Issue.” This manual overviews the four types of issues through the governance process: (1) undergraduate course proposals (both new courses and course revisions), (2) undergraduate degree authorizations, graduation requirements - checksheets for majors, minors concentrations, etc., (3) graduate course proposals (both new courses and course revisions), and (4) graduate programs, certificates, etc.

Logging into JIRA

To log into JIRA, navigate to https://webapps.es.vt.edu/jira/. JIRA works best in Mozilla Firefox, Apple Safari, and Google Chrome.

First-time set-up

Upon first-time login to JIRA, click on the Curriculum Management project link, which is listed in the middle left of the screen. Next, in the upper-left of the screen, select the tab “Dashboard.” Select triangle next to “Dashboard”, then select “Manage Dashboards.” Next, click on the “Popular” button on the left of the screen and click the star next “Curriculum Management” and “College View” (see Figure 1). Other pages can be added by clicking the star indicator—suggest “Curriculum Management”, “UCC”, and “GCC” as favorites, at minimum. With that, the Dashboard is set-up. “Dashboards” JIRA will load with these favorites as options, from now on.

![Manage Dashboards](https://webapps.es.vt.edu/jira/)

Figure 1: Selecting your dashboards
Creating a Curriculum Proposal in JIRA

There are three steps in submitting a proposal for 15-Day Review: 1) creating an issue, 2) moving that issue through the college curriculum committee review process, and 3) notifying the university community of the start of 15-Day Review. The following section will highlight these steps:

Creating an Issue

After logging into JIRA, the “Dashboard” is viewed. The Dashboard contains lists of proposals (issues) organized by their status (15-Day Review; College Revisions; Awaiting Clean Copy, etc). In the close-to-center section of the upper maroon background bar on the screen is the “Create Issue” button (a grey background button). Clicking this button presents the name of the available projects (in the example case, “Project: Curriculum Management”; “Issue Type: Undergraduate Course Proposal”) and a pulldown menu with the three other issue types you can create (see Figure 2).

![Figure 2. Creating an issue](image)

In this example, use the default “Undergraduate Course Proposal”. In this example, an issue to track a revision (greater than 20%) of “Test Course for JIRA Training ABCD 1234 (ADP Title: Test Course)” is created. This information can be pulled directly from the proposal coversheet. The fields marked with an asterisk must be completed, for an issue to be created. NOTE: When a course issue is created, give special attention to Effective Semester, with respect to UCC/GCC and CUSP/CGSP meeting dates, to allow ample approval time when considering the proposal.
For assistance, please call 231-7985.
NOTE: In addition to “Course Revisions”, as noted in these examples, the JIRA system is used to create these other types of “Issues”:

- “New Course”
- “New Course & Inclusion in the Core”
- “Revised Course (Revision less than 20%)”
- “Revised Course for Inclusion in the Core or Core Area Change”

In addition to Course Issues, the JIRA system is also used to create the following other ISSUE TYPES:

- “Undergraduate Degree Authorization, Checksheet” (click this Issue Type to enter “Undergraduate Pathways Planner”)
- “Graduate Course Proposal”
- “Graduate Program, Certificate, etc.”

After entering the requested information from the proposal coversheet, click the “Select Files” button on the Attachment line, and select the complete proposal to attach to the issue (Cover Sheet and all accompanying proposal, support letters, etc.). NOTE: Please attach only PDF Files. Throughout the governance review process, it will often be necessary to upload newer versions of the attachment file PDF. Always upload a new version, in addition to the previously-uploaded items. DO NOT REPLACE the previous version(s) with newer version(s). This affords the opportunity for disclosure of the course refinement, over time. Revisions are often uploaded in response to 15-Day Review comments, as well as UCC/GCC committee review comments. This will allow other users, such as college curriculum committees, to read the proposal and make comments if desired. When saving the PDF of the proposal, please follow this general file naming guideline: (Department Designator and Proposed Course Number_Title_Rev (or New)_Version DATE” – following the example created above, the PDF file would be, “ABCD 1234_Test Course for JIRA Training_Rev_July 4 2016”

Finally, click the “Create” button. JIRA will provide a pop-up confirmation notice showing that the issue has been created. Proposal is now ready to begin moving through the review process. At this point, JIRA will generate and assign a unique “CM reference number” to the issue (CM-2931, for this example). This reference number will, hereafter, be associated to this proposal, as it moves through governance review. Regardless of the status of the proposal, the CM reference number will not change. The person that created this issue will be noted within the proposal as the “Reporter” under the “People” section (Upper right-side) of the proposal page.

As notification of the proposal existing reaches university curriculum folks (Deans, Dept. Heads, Registrar’s Governance Staff, etc.), people may begin “Watching” the issue. Any proposal issue can be “watched” by anyone with JIRA access – to begin tracking items, simply click the “Start Watching this Issue” button, in the “People” section on the “Watchers” line- (upper-right side of the issue page). When any updates, revisions, changes, etc. are made on the items, JIRA sends an email notification to all “Watchers.” Should a watcher ever desire to discontinue watching the issue, the “Watch this issue” can be toggled between “Start Watching” and “Stop Watching this issue”.

For assistance, please call 231-7985.
College Review

After an issue has been created, the issue details can be viewed, as shown in Figure 4. There are four areas of this screen that are important. From top to bottom, they are 1) the Available Actions, 2) the Details, 3) the Attachments, and 4) the Activity:

The row of buttons near the top of the screen show the actions that can be taken on the issue. The status (in the “Details” area) is currently “Proposal Preparation”. The first step in moving the issue through the proposal process is to click the button “Begin Review”. The “Proposal Preparation” step is meant as a holding place while the proposal is being made ready for the College Curriculum Committee to review.
The other information in the details area includes the type, title, ADP Title, College, Effective Semester, etc., that were entered on the “Create Issue” screen.

The next area of the screen, “Attachments”, lists any attachments associated with the issue. **NOTE:** The order of the Attachments can be toggled, and sorted by “Sort-By” settings---Use the drop-down to the right of the plus sign “+” just above the upload date stamp. It is recommended that the “Sort-By” triangle be set twice, for “Sort by Date” and then for “Descending” to see the most-recently-uploaded items at the top of the attachment listings.

Finally, the “Activity” area allows for the review of any comments on the issue, a history of the actions taken, and all the transitions that have occurred between statuses. **NOTE:** The Comments also have a toggle “Sort-By” setting that can be manipulated. The “Sort-By” toggles (for the “Comments” and “Attachments”) reset to their preset defaults each time JIRA is closed. “Sort-By” function has to be selected on the first item viewed each time JIRA is accessed. Thereafter, while logged in, the “Sort-By” selected will carry over to the other proposals (CM issues) viewed.

The next step is to click the “Begin Review” button in the actions area near the top of the screen. Having done that, the transition screen which will allow a new version of the proposal to be attached, if need be. The opportunity to attach a file is available at any point when a proposal is transitioned. Make any comments that may be applicable. Click “Begin Review”. (Figures 5). The issue should now appear as the example in Figure 6.

![Figure 5](image-url)

Figure 5.
Notice the status is now set to “College Committee Review” and the available actions are “Approve” or “Table”. Click “Table” to return the issue to the Proposal Preparation status. For this example, click the “Approve” button to transition proposal to the next step in JIRA process. By clicking “Approve” the proposal is transitioned from “College Committee Review” to the next status, “Approved by College Committee” (Figure 7).

At this point, the proposal has moved through the college curriculum review process. The next step is to submit the proposal for the university 15-Day Review.
Submitting a Proposal for 15-Day Review

Submitting a proposal for 15-Day Review consists of two steps: 1) gathering the required signed coversheet, letters of support, etc. and attaching them to the issue in JIRA, 2) initiating the beginning of 15-Day Review.

Beginning 15-Day Review

Step 1: Attach the proposal packet in its entirety (coversheet, letters of support, etc.) to the issue in JIRA (if is not already a part of the Issue). Having gathered all of the pieces of the proposal (coversheet with signatures, letter(s) of support, proposal body, etc.) -- create one PDF file for the entire proposal. Use the naming convention **designator-number-ADP-title-15-Day Review end date.pdf** for the next step. Example: ABCD 1234_Test Course for JIRA Training_15 Day Review_2016_July 15

Step 2: Indicate the new status of the proposal in JIRA. The proposal is currently in the status, “Approved by College Committee” and the available action is “Begin 15-Day Review” (Figure 8).

After having uploaded the complete proposal to Scholar, click the “Begin 15-Day Review” button. Having done so, the transition screen (Figure 9) should appear.
For assistance, please call 231-7985.

This screen will require the establishment of the 15-Day Review end date. Count forward from the first date of 15-Day Review 15 business days. Only attach the proposal here if not done so previously. In figuring the 15-Day Review Begin and End Dates, remember 15-Day Review will begin WEEK 2 of each Fall and Spring Semester. 15-Day Review is paused on the Last Day of Classes for the Fall and Spring terms. (e.g., Review can begin Dec. 1, 2016 and conclude Feb. 6, 2017). When counting 15 days, begin on the day after the date on which the issue was created, as Day 1.

NOTE: Copy and paste the verbiage provided below in the “Comment” field, customizing it for your proposal, as applicable.

As an example, for an undergraduate course proposal, copy and paste:

“The undergraduate course proposal ABCD 1234 has received the approval of the College of XYZABC and is available for your information and review at the following address: https://webapps.es.vt.edu/jira/browse/CM-2931. Please share this with those in your college or department who may have an interest. Questions or comments concerning this proposal should be made by clicking the [15-Day Review Comment] button on https://webapps.es.vt.edu/jira/browse/CM-2931. Please also notify Joe College, (xxxx@vt.edu), Assoc. Dean of Undergraduate Academic Affairs in the College of XYZABC. The deadline for receiving comments is September 16, 2016.”

If documents and comments are not posted as the issue is created, they can be added later, by clicking the drop-down menu “MORE” and “Attach Files” and adding comments using the “Comment” button.
The key information provided in this comment notice is the name and type of proposal (change the first sentence based on the type of proposal you are submitting), the URL for downloading it from Scholar, the instructions for making 15-Day Review comments, and the end date of 15-Day Review.

At this point, the proposal has been submitted for 15-Day Review. The JIRA system will notify the faculty and administrators (Associate Deans, the University Registrar Governance Staff) via email with the link to the proposal in JIRA and Scholar.

15-Day Review Comments by the university community and Governance Staff:

Once an issue begins 15-Day Review, the university community and the Office of the University Registrar Governance Staff has the opportunity to perform a review and share feedback/comments, both via email to the Curriculum Coordinator as well as posted to JIRA, in the corresponding CM issue. (example CM-2931).

Commenting on a proposal during 15-Day Review

If any university stakeholder has a question or concern about a proposal during the 15-Day Review period, make that comment by navigating to the proposal in JIRA using the link provided in the 15-Day Review notification, or searching by name or keyword in the Quick Search feature in the top right corner of the screen. Once located, (TEST 1234 in this example) click the 15-Day Review Comment button (indicated by the orange arrow in Figure 16). Type the question, concern or comment in the box provided. Placing a 15-Day Review comment on any proposal will trigger a HOLD to be placed on the issue. Governance Staff will review the posted comments and determine if the hold must remain in place, or if it can be removed. Any conflict or question addressed in 15-Day Review should be documented in JIRA to present the disposition to the question, concern and/or comment.
For assistance, please call 231-7985.

If a university community member have comments or concerns during 15-Day Review, comments or concerns should also be posted within “Comments” for the CM item. If issues are raised by email, posting the email, showing the date of correspondence and source (name or VT email address) will suffice. Comments may be directed to the College Curriculum Coordinator or the University Registrar Governance Staff to post as 15-Day Comments/feedback.

**15-Day Review Comment NOTE:** Both 15-Day Review comments, as well as some UCC and GCC comments, refer to the use of “Consider….” such as “Consider replacing verbs in learning objective #5 and #6, with higher-level verbs” or “Consider expanding verbiage in section III showing Justification for the course, unique to the university and the departmental curriculum in which it is proposed to be a part.”, etc. The use of “Consider…” is constructive feedback, not a requirement. Should the proposer wish to not follow the feedback shared in 15-Day Review Comments, they are asked to post, within Comments, their justification for not integrating the comments, citing “incorporating suggested changes will change intent or direction of proposal,” or words to that effect.

15-Day Comments regarding such set-up items as Effective Semester, ADP Title (compliance with 30-character maximum), Approval signatures, Credit Reference within Catalog Description, etc., will also be noted during 15-Day Review – clarification/correction on these type items can potentially hold a proposal up from being moved through governance review. Following the guidelines outlined in the
Governance Course and Checksheet Approvals section of the University Registrar website, will ensure a smooth movement through the governance review: [http://www.registrar.vt.edu/governance/course-approval/process/index.html#ApprovalProcessforNewRevisedInformation](http://www.registrar.vt.edu/governance/course-approval/process/index.html#ApprovalProcessforNewRevisedInformation)

What happens after 15-Day Review ends ???

When 15-Day Review concludes, the proposal is reviewed by the Governance Staff to determine if it is ready to move forward to an upcoming UCC/GCC Agenda. If there are no issues, the proposal will move to “Preparing for (UCC/GCC)” and ultimately, “UCC/GCC Agenda”. If there are issues, such as a concern raised by department or a course number or credit correction, etc., within the proposal, a HOLD will be placed on the proposal, until resolution of the issue is reached and posted in JIRA.

Once a proposal comes before UCC/GCC, as an agenda item, the proposing faculty and the College Curriculum Coordinator are notified, by email, of the item’s placement on the UCC/GCC Agenda. At UCC/GCC, the proposal will generally follow one of three paths:

• (1) “Approved without Modification” -- A status of “Approved without Modification” requires no further uploads to JIRA, for the proposal. The materials previously posted will be used as the official file copy of the course proposal.

• (2) “Approved with Modifications” -- A status of “Approved with Modifications” will be move a proposal to a status of “Awaiting Clean Copy”, until such time as the revisions requested by UCC/GCC are uploaded.

• (3) “Tabled Pending Revisions” -- A status of “Tabled Pending Revisions” will move the proposal status back to “College Revisions” until such time as the suggested UCC/GCC revisions are uploaded.

Refer to pages 16-18, of this manual, on “Posting Revisions” for instructions on how to process revisions and move the proposal forward. Once revisions are posted (assuming all requested revisions are made), and the proposal moved to “Return to Registrar” status, the Governance Staff will review the posted revisions, and move the proposal forward for placement in the next available UCC/GCC Agenda. The proposal DOES NOT have to return back through a second cycle of 15-Day Review.

**Processing Revisions**

When the Undergraduate Curriculum Committee (UCC) or the Graduate Curriculum Committee (GCC) table a proposal or approve it (as-is or with revisions), the college curriculum coordinator and the proposal contact will be notified. The requested revisions will be linked to JIRA, in the email and be viewable in the details of the particular proposal (CM-xxxx). Additionally, if UCC/GCC has approved with revisions, the proposals needing revisions will be listed in the “Revisions Needed” list on the JIRA Dashboard (Figure 10).
Proposals which have been Tabled by UCC/GCC, will fall into the “College Revisions” filter. Clicking a proposal number or “Key” or “Summary” item link, will open the detail screen for that proposal. Once open, choose to copy and paste into an email, the feedback from the UCC/GCC review/notes with the appropriate faculty member (as proposer). Upon receiving the revisions from the proposer, please assemble a new, revised version of the COMPLETE PROPOSAL (the cover sheet, proposal, any letters, etc.), and upload as an additional PDF file (Please DO NOT REPLACE the previously uploaded version(s).

Clicking on a proposal CM Number (or “Key”) or the “Summary” link (which shows course designator and number) will open the Detail Screen for that proposal (Figure 11). Copy and paste the feedback/comments, from 15-Day Review as well as UCC/GCC comments, to the proposing faculty, for their consideration. Upon receiving the revisions from the proposer, please assemble a new version of the COMPLETE proposal as a PDF file using the naming convention designator-number-ADP Title-revised.pdf”. Click the “Return to University Registrar” or “Return to Graduate School” button, and attach the revised PDF on the transition screen or go to the “More” button and use “Attach Files” from that drop-down menu).
Browsing Proposals

After logging in for the first time and setting up the Dashboard (see First Time Setup, page 1) the status of any proposal in the system may be viewed using the summary lists. Enter the full CM reference in the upper right-corner “Search Block”, within the Maroon header, “CM-2931” (example), or go to the “Issue Statistics” box, (lower right-side) and open the various status category list. For example, clicking on the words 15-Day Review (Figure 12) will display a list of the items currently on 15-Day Review (Figure 13).

For assistance, please call 231-7985.
For assistance, please call 231-7985.

Figure 12. Browsing the dashboard

Figure 13. List of proposals on 15-Day Review

Clicking on the designator and number of a proposal in that list will open the detail page for that proposal. The detail page contains the basic information about the proposal, such as the title, type of proposal, the attached proposal itself, and the 15-Day Review end date (Figure 14). Clicking the attachment will open or download (depending on your browser settings) the proposal itself.
All comments associated with the proposal, along with the history of all actions on this CM issue, are listed within the “All”, “Comments”, “History”, “Activity” and “Transitions” tabs at the bottom of the screen.
Once a course receives UCC/GCC approval, the proposal is then shared, as part of the associated meeting’s agenda, as a UCC/GCC Report to CUSP/CGSP. Once approved by CUSP/CGSP, the course will be added to the Banner Course Record system, with the proposed/approved Effective Term/Year. At the point the course is entered into Banner Course Record system, the proposer and College Curriculum Coordinator receive email notices that the course is now entered into Banner and can be scheduled in the Timetable. To schedule courses in the timetable, and request room reservations for the course, departments should contact Classroom Scheduling within the Registrar’s Office staff, at csep1@vt.edu.

JIRA is a software designed to assist those involved in Governance. In addition to JIRA, the Office of the University Registrar Governance staff are also standing by to assist. If questions occur along the way, regarding JIRA access, functions, movement through the system, etc., please contact us:

Gary Kinder, Governance Coordinator
gkinder@vt.edu; (540) 231-1179

Justin Sanders, Governance Support
justinsanders@vt.edu; (540) 231-7985

Gary Costello, Associate Registrar for Classroom Scheduling and Governance
garyjc2@vt.edu; (540) 231-6888