XSEDE Quarterly Meeting Action Items and Decision Recording

Please do not use the Microsoft Edge browser for this.

1) Find the session for which you took notes in the Quarterly Meeting Agenda table in Confluence.

XSEDE Quarterly Meeting - March 10-11, 2021

2) In the “Actions/ Decisions” column, click on the link to the page for recording action items, decisions, and notes. Open up the page for editing by selecting the “Edit” button at the top right of the page. Fill the decision and action tables with the required information. There is a free form space for additional notes if needed. Remember to hit the “save” button at the bottom of the page when you finish entering all the decisions and action items.

3) In either table, highlight any word or words in the first box of the summary column. When you release the mouse button, a box with the Jira icon will appear. Select the Jira icon to create a Jira issue.

4) A “Create Issue” box will pop up. At the bottom of the box, find and select the option to “create # issues from this table.”

5) A “Create Multiple Issues” box will appear. Make sure the Issue is defined properly as either **“Quarterly Meeting Action Item”** for action items or **“Quarterly Meeting Decision”** for decisions. If the issue type needs to be modified, use the “edit” button next to the issue type to change it accordingly.

6) When you select the “create” button at the bottom of the box, issues will be created for all of the items you entered in the table. A link to the Jira issues will appear in the “summary” cells of the tables. The text entered in the “summary” cells of the table will be pulled into the “summary” field of the issue and the text entered in the “description” cells of the table will be pulled into the description field of the issue.

7) For issues that are decisions, no further action is required.

8) For issues that are action items, please click on the Jira issue link to open up the issue in Jira so that you can assign the action item to the appropriate person and enter the due date.

9) To assign the issue to the appropriate person, click on the “Assign” button at the top left of the issue page. An “assign” box will pop up. In the “Assignee” field, begin typing the name of the person who will be responsible for the action item. A list of names will appear below the box in which you are typing. When you see the correct name, click on it to select that person. Click on the “assign” button at the bottom of the “assign” box. If the issue was not assigned to a person during the meeting please indicate the appropriate person for follow up. If multiple people are assigned to the action item, please assign the issue to the first person on the list of assignees and make the other assignees "watchers" of the issue as well as adding the other names in the comments section of the JIRA issue.

10) In order to add the due date, click on the “edit” button at the top left of the issue page. An “edit issue” box will pop up. Enter the due date in the “due date” field. Click on the “update” button at the bottom of the box. If no due date was assigned during the meeting please indicate that in the comment section of the JIRA issue or in the due date section of the notes table.

11) You will automatically be set up as a “watcher” of the issues you create. If you do not need to receive updates on the issues you create, make sure to select “Stop watching this issue” located in the “People” section of the issue on the right side of the page.

12) If no actions, decisions, or notes came of the meeting, please write N/A in each of the tables.

13) If you have any questions or problems with this process, please contact Sonia Nayak s1nayak@ucsd.edu