Chronodat Issue Tracker Add-in

User Manual

CHRONODAT, LLC

February 15, 2017

Version 2.0

CHRONODAT

Introduction

The introduction section of the document describes the scope and objective of Office 365 Chronodat Issue Tracker Add-in.

Scope & Objective

The Chronodat Issue Tracker add-in provides a method to track clients and their IT project-related issues. Does your business have multiple clients? Does a given client have multiple IT projects? Does each client have IT project-related issues that need tracking? Look no further - the Issue Tracker add-in keeps everything separated, within an easy-to-manage interface.

The Issue Tracker add-in utilizes Office 365 SharePoint Online and SharePoint On-Premises. After a small amount of configuration (mostly just defining your clients and their respective project names), you are up and running!

Add-in Overview

The primary objective of the add-in is to create an IT project-related issue for a specific client, and track that issue to its end resolution. After creating it, the issue is assigned, worked, resolved, then closed. If your team is Scrum- or Agile-based, the design and workflow of the Issue Tracker add-in will be very familiar to you.

Client, Project and Personal dashboards in the same format is available for each Team member to see his or her own issues

Features:

- Pre-defined **Issue Types**, such as Defect, Improvement, New Feature, Task, etc., *all configurable according to your business*

- Pre-defined **Issue prefix** to easily identify and manage issues; for example, "IT-Issue-2016-1"

- Pre-defined **Issue Categories** (such as Hardware, Software, etc.), & **Issue Sub-Categories** (such as broken monitor, need Microsoft Office installed, etc.), *all configurable according to your business*

- Pre-defined **Resolution Categories**, such as Fixed, Cannot Reproduce, Works as Designed, Canceled, etc., *all configurable according to your business*

- Pre-written Email Templates for notifications sent to the client, *again, configurable according to your business*

- Color-coded, built-in dashboards for quick metrics & reporting, with no configuration needed; there is a **Global Dashboard** for **all client issues**, and a **personal Dashboard** for each Project team member. In both types of Dashboards, you see:
    - 10 most recently updated Issues, by **Status**
    - Issue Status **pie chart** (Active vs. Closed)
    - Issue Status **bar chart**, based on **Priority**
    - Issue Status **bell curve chart,** based on **Project**
    - Issue Status **grid**, based on **Assigned To**
    - 5 most recently updated Issues, regardless of Priority or Status

- **Project and Client Dashboards** for Issues related to a specific client or project. In both types of Dashboards, you see:
    - 10 most recently updated Issues, by **Status**
    - Issue Status **pie chart** (Active vs. Closed)
    - Issue Status **bar chart**, based on **Priority**
    - Issue Status **bell curve chart,** based on **Category**
    - Issue Status **grid**, based on **Assigned To**
    - 5 most recently updated Issues, regardless of Priority or Status

- An Issues Board, with column-based board views, with a drag & drop feature for quickly changing Statuses

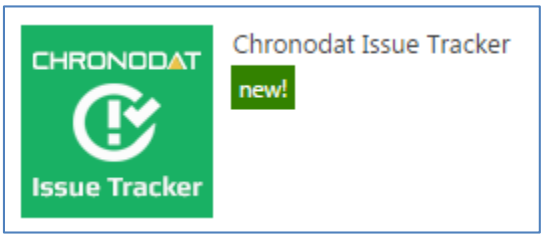
- Powerful Search engine to find Issues quickly & easily

- Export options, such as Excel, PDF, CSV, and more

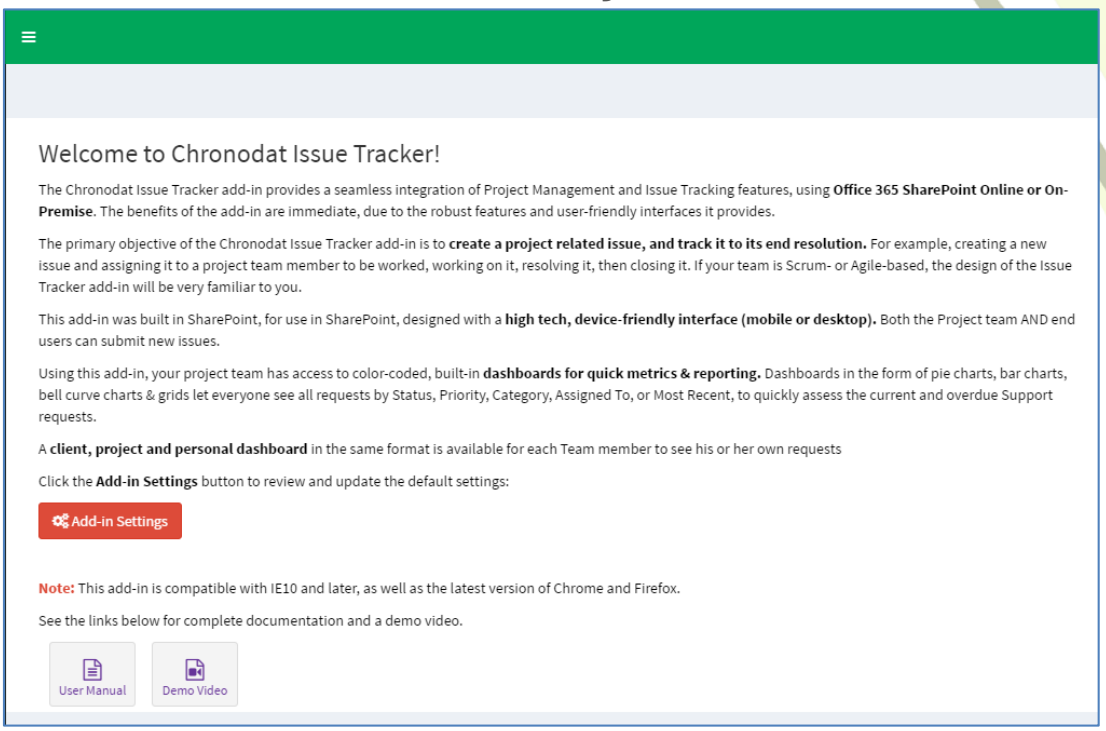
- Setup for designating a client's Project Support Contacts
- Issues document repository for uploading & storing documents for the Project team to share and use
- A Project Team Calendar to keep track of client and project meetings, Project team social events, etc.
- Possible to change logo and add-in color scheme
- Restrict add-in settings access to specific SharePoint group
- Security is built in, and user access is very customizable

Configuring Chronodat Help Desk Add-in

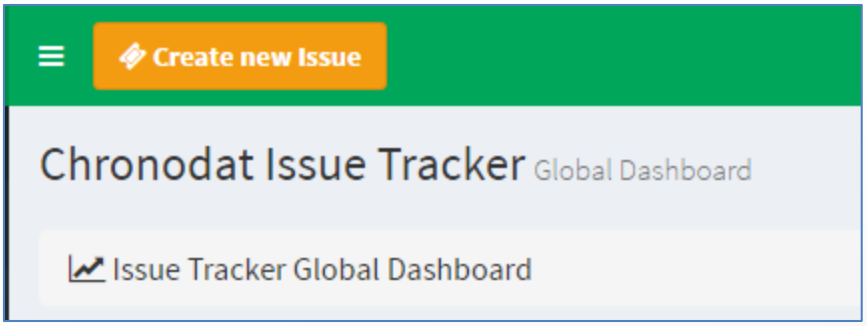
1. Click **Chronodat Issue Tracker.**



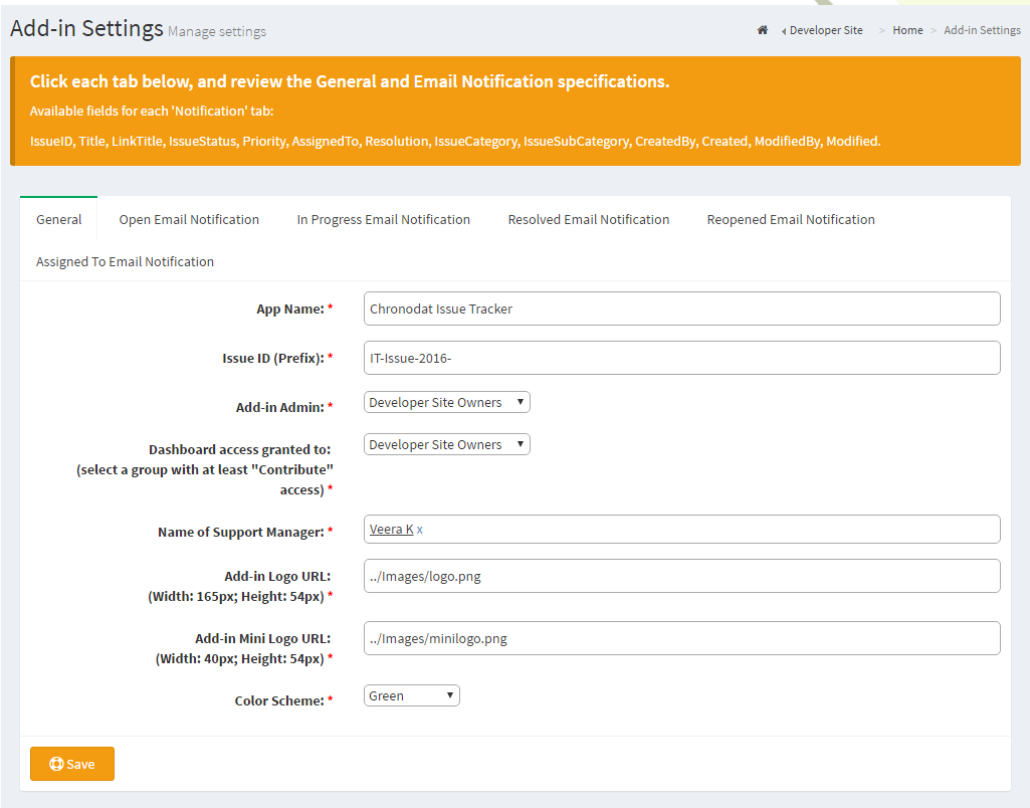
2. Click the red button to review the Add-in Settings.



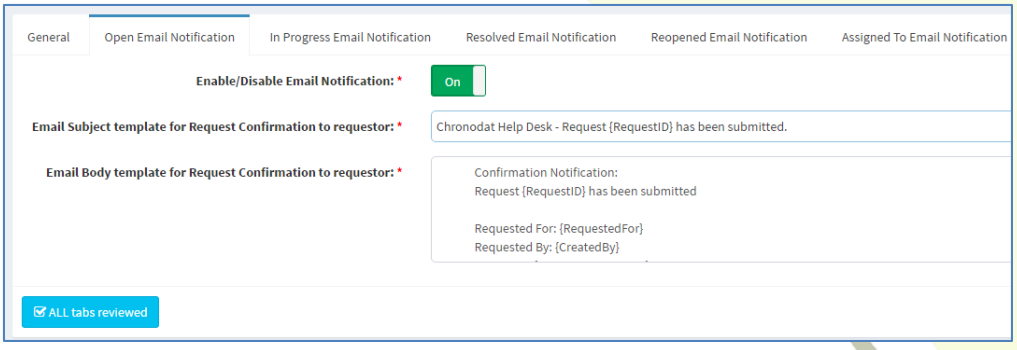
3. On the **General** tab, enter the name you want for your Issue Tracker add-in (it will display on screens such as the Dashboard).



- Select who can access the Add-In Settings (select a specific SharePoint group)
- Select who can access Dashboard (select a specific SharePoint group)
- Then add the name of the Support Manager.
- Copy and paste logo URL from your intranet or from a SharePoint library. Follow the logo height and width specifications.
- Change color scheme as per your branding requirements using predefined color schemes.

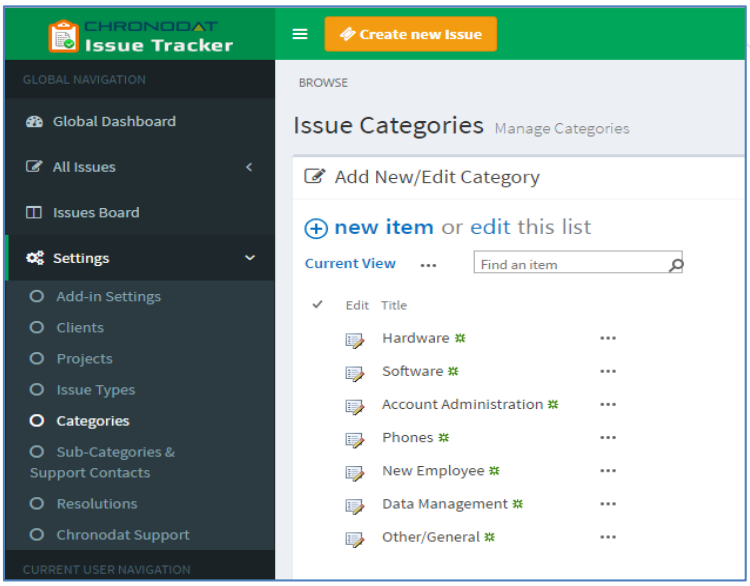


4. Click the next tab in sequence. You may be tempted to press **Save**, but you need to finish reviewing all the other tabs. If you do, however, click **Save**, you can always quickly get back to this screen by clicking **Settings > Add-in Settings**. This tab allows you to configure the email that will be sent to the user after **submitting a Issue**.
   - If you don't want the user to receive an email, just click **Disable**. If you do want the user to receive an email, leave the default.
   - The first field is how the **subject line** will display in the email to the user. You can either change the text, or leave the default.
   - Notice how the Subject contains {IssueID}. Not only can you use that field, but a host of other fields, which are listed in the blue bar above.
   - The next field contains the text in the **body** of the email to the user. Again, use the available fields listed in the blue bar, and configure the text however you like!



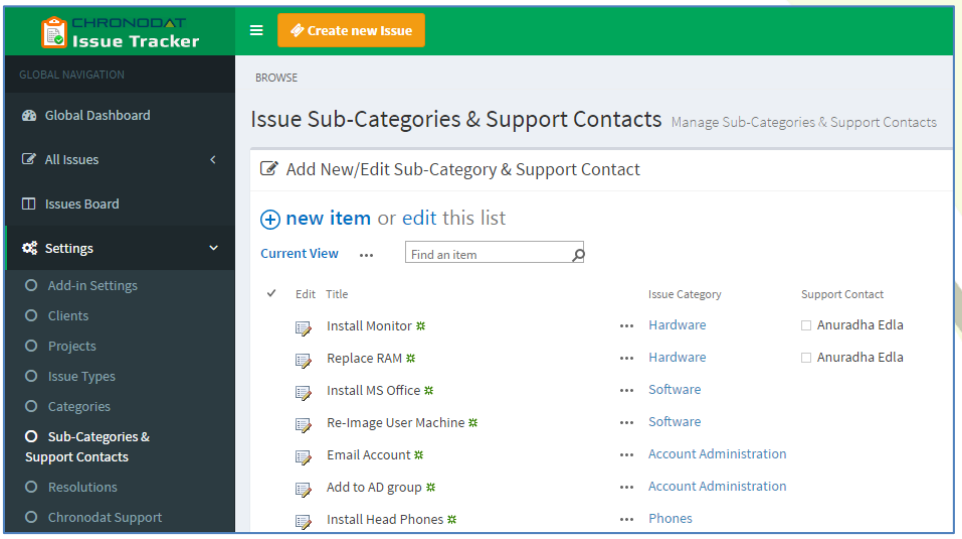
5. When finished, click the next tab in sequence. This tab is very similar, but it's for the email that the user sees when the Issue has moved to **In Progress**.
    - Again, you can turn it off by clicking **Disable**.
    - Configure the subject line in this field. Remember you can use the available fields in the blue bar above.
    - Configure the body of the email in this field.
6. The rest of the tabs function the same way.
    - This tab is for the email sent when the Issue has been **Resolved**.
    - This tab is for the email sent when the Issue has been **Reopened**. That means the Issue when through the entire workflow (ending with **Resolved**), but it wasn't truly resolved, and had to be reopened. When an Issue is reopened, **the Support Manager is cc'd on the email notification, so that he or she is aware that something didn't go quite right**.
    - The last tab is for the email sent to the Project team member who will be working the issue.
7. Once you're finished reviewing all the tabs, click the blue button at the bottom. *As mentioned before, you can always go back and make some adjustments if you change your mind! Just click* **Settings > Add-in Settings**.
8. Now Add-in redirects to Dashboard page (Empty Dashboard).

9. Next, you click **Settings > Categories**. This screen is for defining the high-level Categories that your Issues will be listed under. You can add a new Category by clicking **New Item**, or **edit** the Categories that are listed by clicking Edit this list. I'll show you both.
    - **New Item** > I'll enter **Air Conditioning/Heating**, then click **Save**.



    - I'll now click **Edit this list**. To make changes, click the ellipses beside an item. I want **Other/General** to say just **Other**, so I'll click the ellipses beside it, **Edit Item**, remove the unwanted text, **Save**, then click **Stop editing this list**.
10. Next, you click **Sub-Categories & Support Contacts**. Since we just defined our high-level Categories, now we want to define their Sub-Categories, and designate a Project Support Contact for each.
    - Remember we saw **Hardware, Software**, etc.? Well, notice how there is **Install Monitor** and **Replace RAM** under **Hardware**. Install **MS Office**, **Re-Image User Machine** under **Software**. You get the idea.
    - You make changes the same way – you click **New Item** or **Edit this list**.

- Beside each item, you need to designate a default **Support Contact** so that anytime an Issue is put in under this Category & Sub-Category, it will automatically be assigned to that person, and he or she will receive an email notification (along with the user) when a new Issue is submitted.



- If your Support Team is already part of a SharePoint group, you can assign that SharePoint group as your Support Team in Chronodat Issue Tracker, which we'll see more about in the **Security** section of this video.
    - I'll go through one example: click the ellipses, **Edit Item**, I'll enter Lee, I'll select **John Lee**, **Save**, then click **Stop editing this list**.
    - You would then continue with the remaining items in the list in the same way.

11. Now that we've defined the Categories, Sub-Categories, and designated Support Contacts, we want to configure the Issue Resolutions, so I'll click **Resolutions** on the left. These are closing resolutions when a Issue has been evaluated or worked. Again, click **New Item** or **Edit this list**.

Navigation

General Navigation

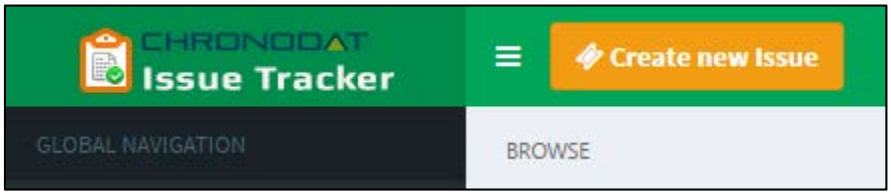
Navigation options are found in the left margin. The arrows function as a toggle, and indicate more menu items below. There are 3 sections: a **Global** section for viewing ALL Issues, a **User** section for viewing your own Issues, and a section for **Team Documents** and a **Team Calendar**. We'll be going through each of these items in more detail.

Navigating to the Dashboard

You can click the **Home** (house) icon at the top right, the **Chronodat Issue Tracker** icon at the top left, or **Dashboard** in the left navigation to go to the Dashboard. All 3 methods take you to the same place.

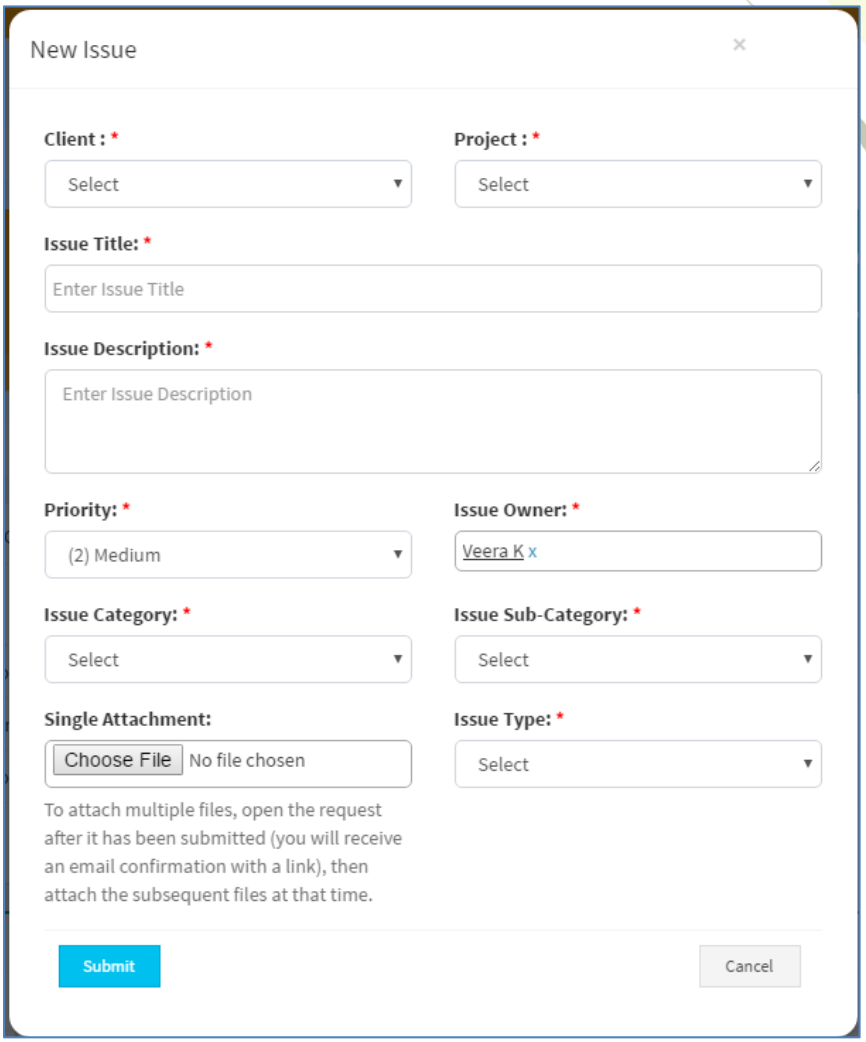
Hiding the Left Navigation

You can click the 'bar' icon at the top left (next to **Create new Issue**) to hide the left navigation, thus widening the information on the page that is currently displayed.



Creating a New Issue

Now that we've covered the basic navigation, let's create an Issue. Click the **Create New Issue** button at the top left. Complete the fields (required fields are indicated by a red asterisk), then click **Submit**.

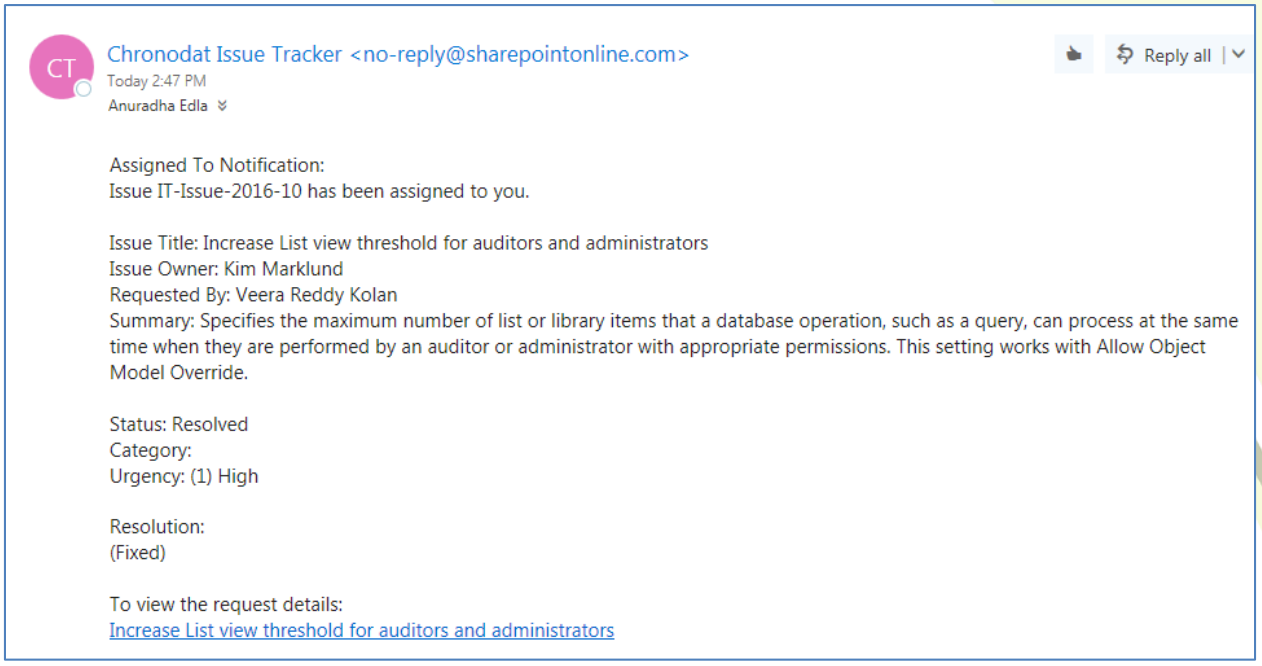


Assigning a Issue

- Issues are automatically assigned to the team Contact defined in the Sub-Categories list.
- You can, however, *manually* assign a different Support Contact to the Issue.
- If a Support Contact is not defined, the Issue will be assigned to the user who creates the Issue.

Open the Issue by clicking on the **Issue ID**. Click **Edit Item**, then enter a Project team member under **Assigned To** (just start typing the first few letters of the last name), then click **Save**.

Issue Owner and Support Contact receive email notifications.



Chronodat Issue Tracker <no-reply@sharepointonline.com>
Today 2:47 PM
Anuradha Edla

Reply all

Assigned To Notification:
Issue IT-Issue-2016-10 has been assigned to you.

Issue Title: Increase List view threshold for auditors and administrators
Issue Owner: Kim Marklund
Requested By: Veera Reddy Kolan
Summary: Specifies the maximum number of list or library items that a database operation, such as a query, can process at the same time when they are performed by an auditor or administrator with appropriate permissions. This setting works with Allow Object Model Override.

Status: Resolved
Category:
Urgency: (1) High

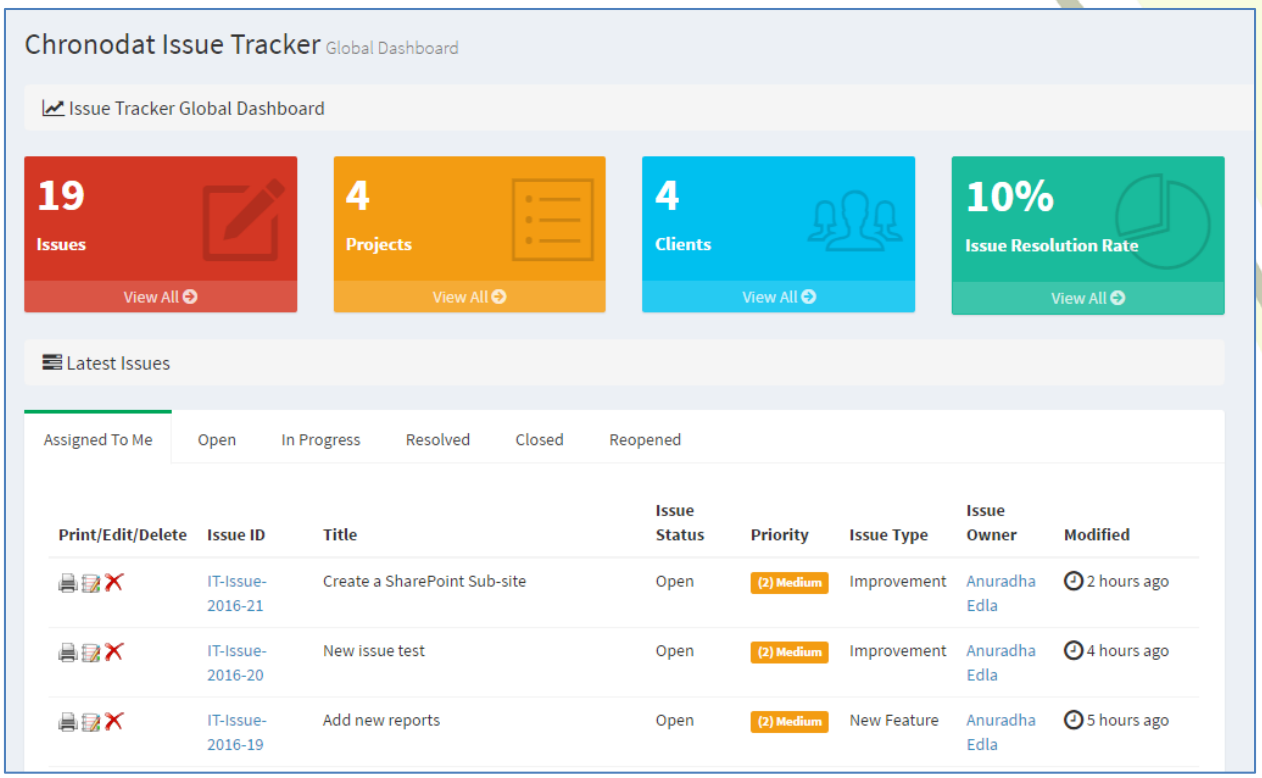
Resolution:
(Fixed)

To view the request details:
Increase List view threshold for auditors and administrators

Dashboards

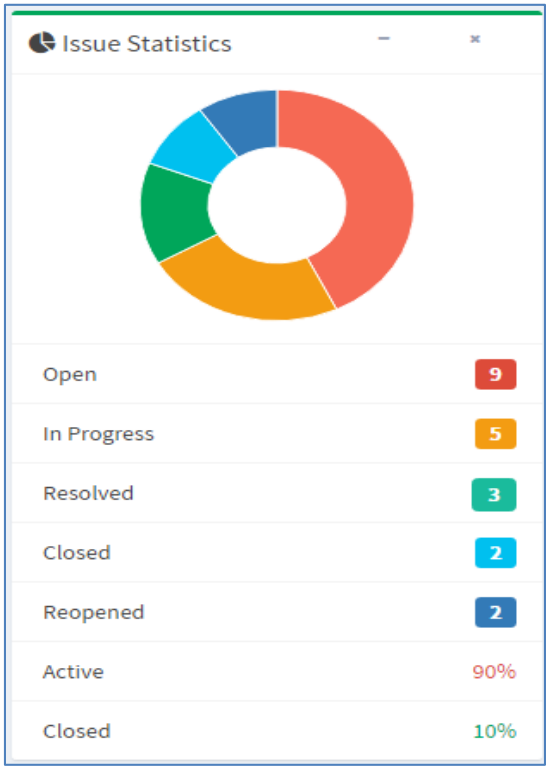
We understand the **importance of reporting**, so forget your Excel spreadsheets and the manual work of chasing down unresolved Issues. The Dashboards will give you your reporting statistics.

Click **Global Dashboard**. The Statuses are listed horizontally above. **Issues (Active) means anything not in a Closed or Accepted state**. **Projects** associated with current issues. Click "View All" to view all projects irrespective of issues. **Clients** associated with current issues. Click "View All" to view all Clients irrespective of issues.

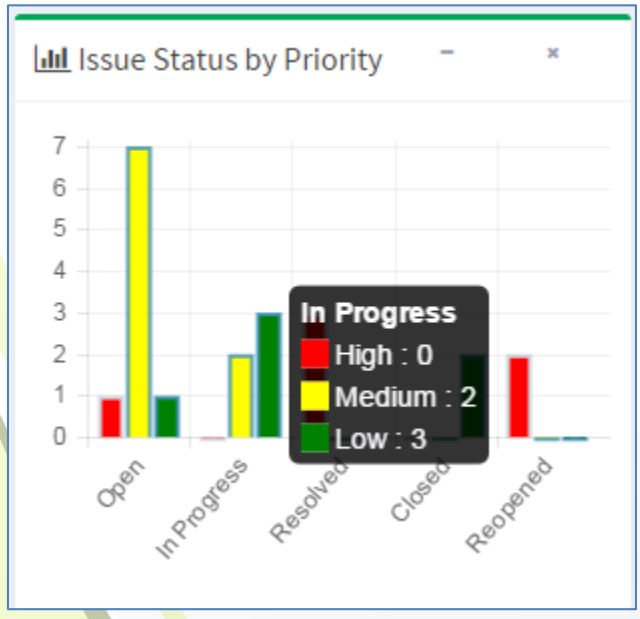


The large boxes on the top match the tabs below it. Scroll through the tabs to see the respective Issues for each Status. The list contains the latest **10 Issues** for each Status.

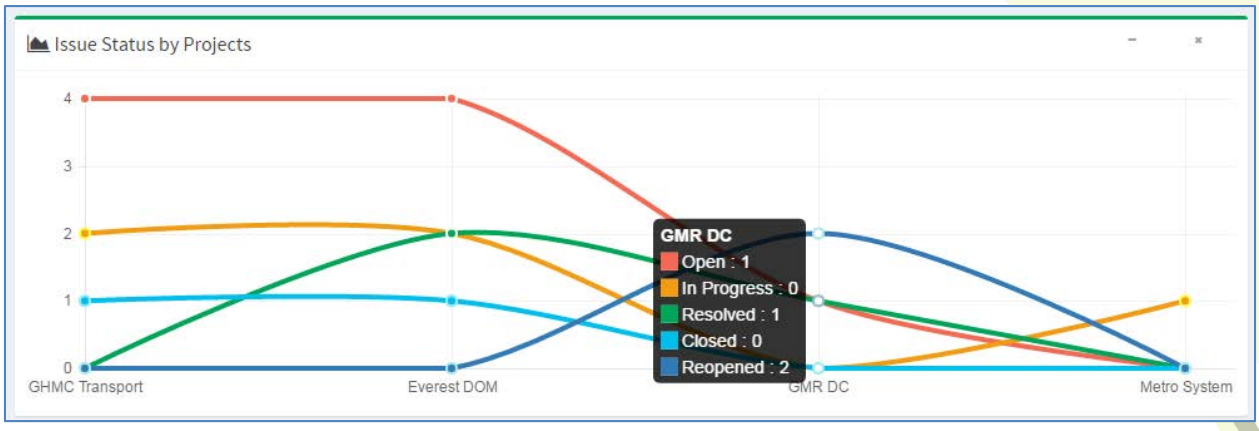
Notice the **pie chart** on the right, which gives you a visual of the **Active vs. Closed** Issues, and quickly lets you see that there are a lot more Issues that are **Active** than **Closed**.



The **bar chart** gives you a quick assessment **by Priority** for each Status. Red indicates High, Yellow is Medium, and Green is Low priority. So for the Open status, 4 tickets are **High** priority. For **In Progress**, 3 are Low priority, and so on.



Below the Issues is a **bell curve chart**, by **Projects**. Hover over the labels at the bottom to see a popup with more information about them. Focusing on the **Project labels** at the bottom, you will see that the majority of Issues have been **Software** Issues (if you look on the left, there have been 4 Issues), and very few Issues have been submitted for **Phones**.



The grid below shows you Issues **by Assigned To**. This display quickly lets you know how your staff is doing with regard to the Issues assigned to each member. You can quickly assess that **John Lee** has the bulk of the Issues assigned to him. This display lets you quickly see who might be overloaded or not have enough work, and you can make any necessary adjustments.

Issue Status by Assignee

Copy CSV Excel PDF Print

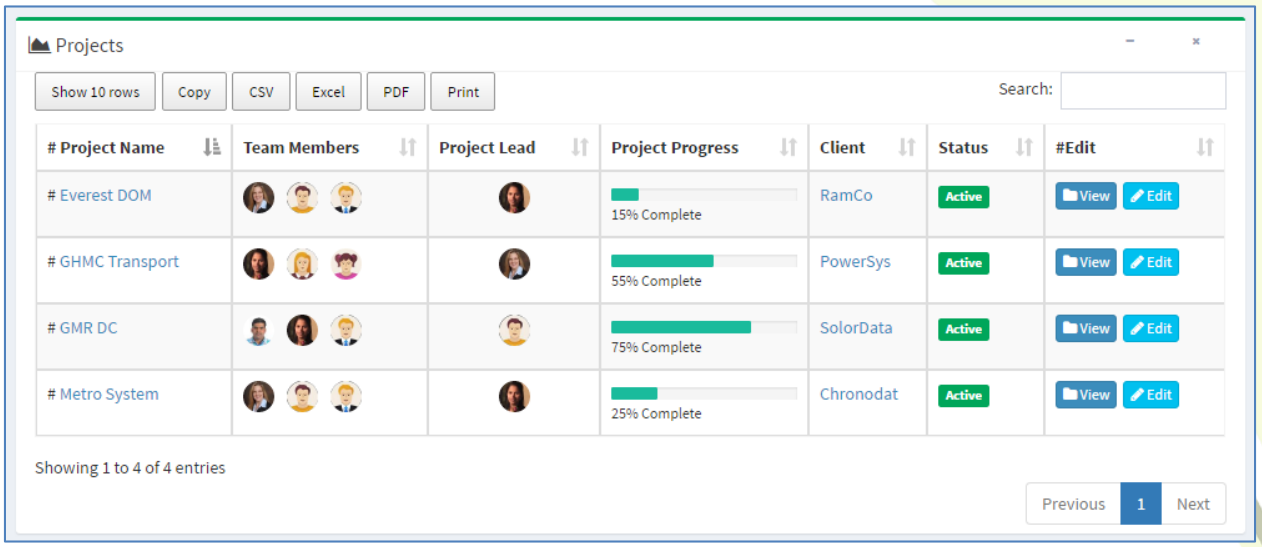
Assigned To	Open	In Progress	Resolved	Closed	Reopened	Total
Anuradha Edla	6	1	0	0	1	8
Chris Brown	2	1	0	0	0	3
Jennifer Glover	0	0	0	0	1	1
Kim Marklund	1	2	1	1	0	5
Nita Daniel	0	1	2	1	0	4
Total	**9**	**5**	**3**	**2**	**2**	**21**

Notice the buttons at the top left. These are for exporting the grid.

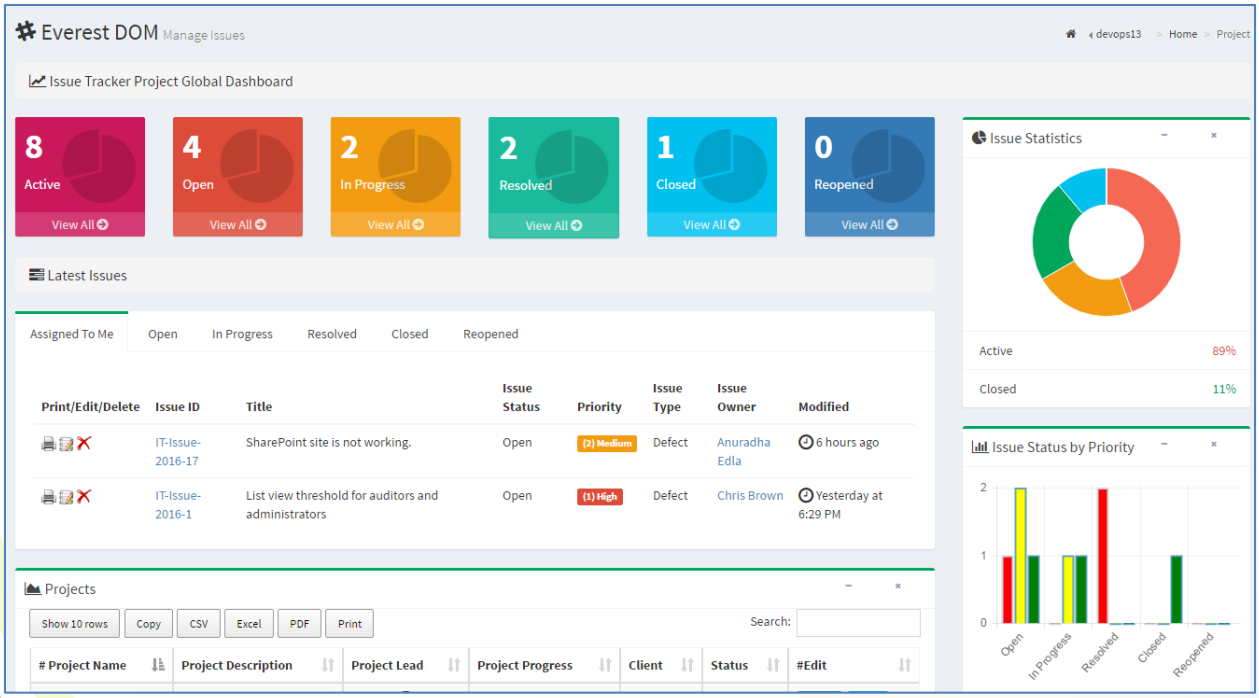
- **Copy** copies the table to the Clipboard.
- **CSV** means comma-separated values, and is just the raw, unformatted data
- **Excel** puts the grid in an Excel file, so that you can take advantage of the filtering, and formatting features that Excel provides
- **PDF** exports the grid as a PDF file, and **Print** is for printing the grid

Project and Client Dashboards.

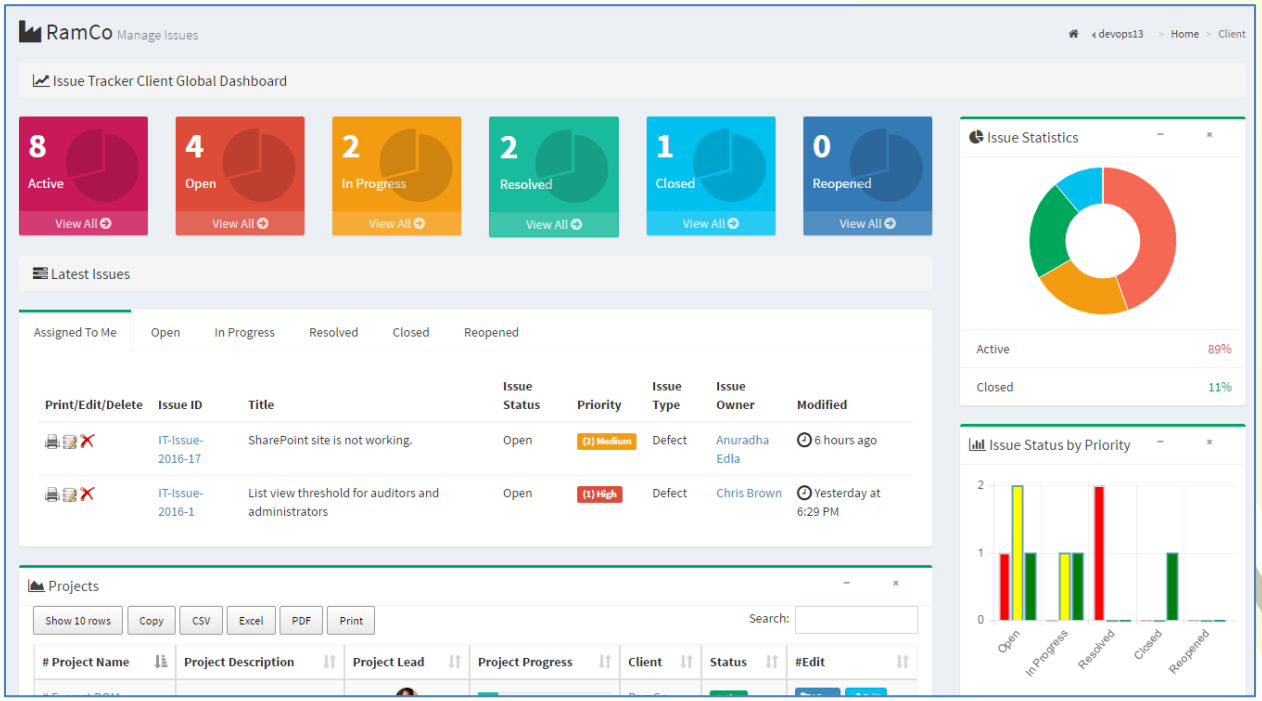
Click on Project or Client link in Projects table to view Project or Client Dashboard.



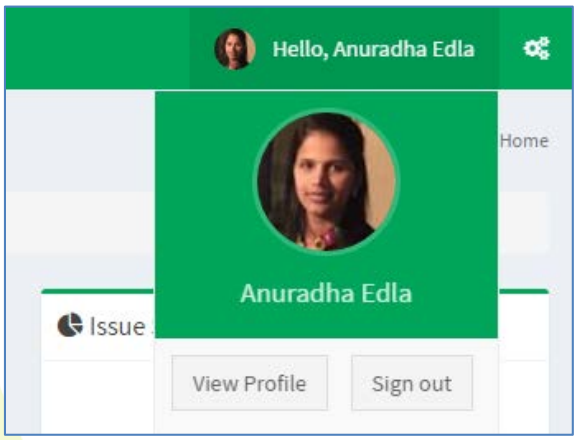
Project Dashboard



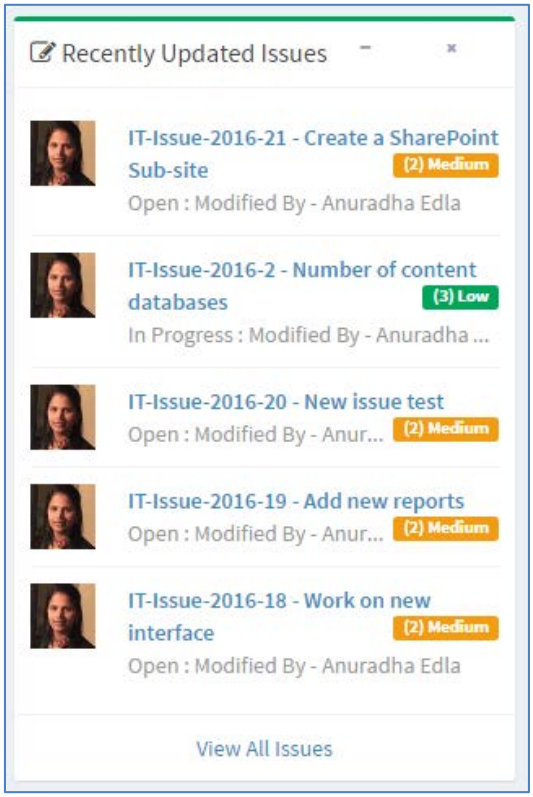
Client Dashboard



If you want to change your avatar or edit your profile in any way, click on the name, it displays a menu option "View Profile", click on view profile and a SharePoint profile page will display. Click the **Back** button on your browser to return.



The last area to point out is the **Recently Updated Issues** on the right. These are the 5 most recently updated Issues, regardless of Priority or Status.



Note that clicking **View All Issues** at the bottom right is the same as clicking the **Active** box at the top left.

The list of Issues in the middle is the latest **10 Issues**. If you want to view **ALL Issues** under a particular Status, click **View All** below it.

Latest Issues

Assigned To Me | Open | In Progress | Resolved | Closed | Reopened

Print/Edit/Delete	Issue ID	Title	Issue Status	Priority	Issue Type	Issue Owner	Modified
	IT-Issue-2016-17	SharePoint site is not working.	Open	(2) Medium	Defect	Anuradha Edla	5 hours ago
	IT-Issue-2016-1	List view threshold for auditors and administrators	Open	(1) High	Defect	Chris Brown	Yesterday at 6:29 PM
	IT-Issue-2016-14	Find Number of content databases	Reopened	(1) High	Improvement	Jennifer Glover	Yesterday at 6:29 PM
	IT-Issue-2016-12	Increase Content database size (all usage scenarios)	In Progress	(2) Medium	Improvement	Chris Brown	Yesterday at 6:20 PM

The page that displays shows all Issues for this Status in a grid layout, sorted by **Modified Date**. Notice the same **Export** options at the top left that we just saw, which shows the consistency in the add-in. There is also a **Search** box at the top right, plus buttons at the bottom right for paging forward and backward.

Issues - Open Manage Issues

devops13 > Home > Issues - Open

Show 10 rows | Copy | CSV | Excel | PDF | Print

Search:

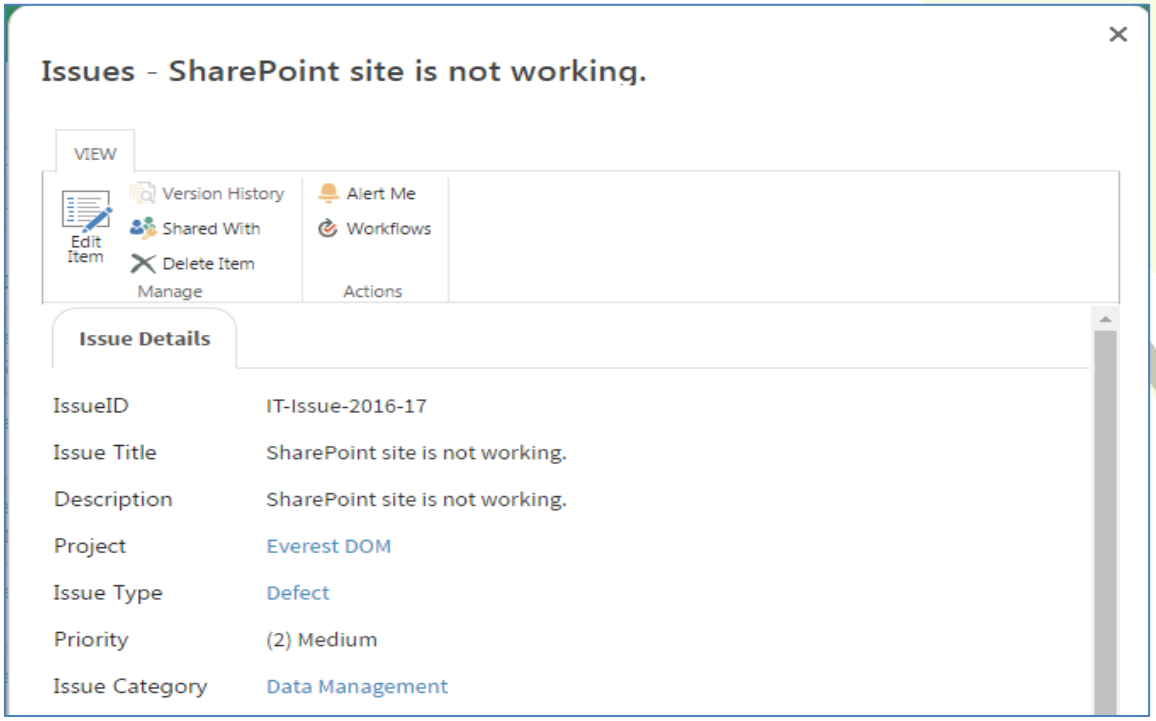
Print/Edit/Delete	Issue ID	Title	Issue Status	Priority	Issue Type	Issue Category	Issue Owner	Assigned To	Modified
	IT-Issue-2016-17	SharePoint site is not working.	Open	(2) Medium	Defect	Data Management	Anuradha Edla	Anuradha Edla	5 hours ago
	IT-Issue-2016-8	Site collections per content database	Open	(3) Low	Task		Kim Marklund	Kim Marklund	Yesterday at 6:34 PM
	IT-Issue-2016-11	Document Content database size (document archive scenario)	Open	(2) Medium	New Feature		Chris Brown	Chris Brown	Yesterday at 6:34 PM
	IT-Issue-2016-4	Coauthoring in Word and PowerPoint for .docx, .pptx and .ppsx files	Open	(2) Medium	Improvement		Chris Brown	Chris Brown	Yesterday at 6:33 PM
	IT-Issue-2016-1	List view threshold for auditors and administrators	Open	(1) High	Defect		Chris Brown	Anuradha Edla	Yesterday at 6:29 PM

Showing 1 to 5 of 5 entries

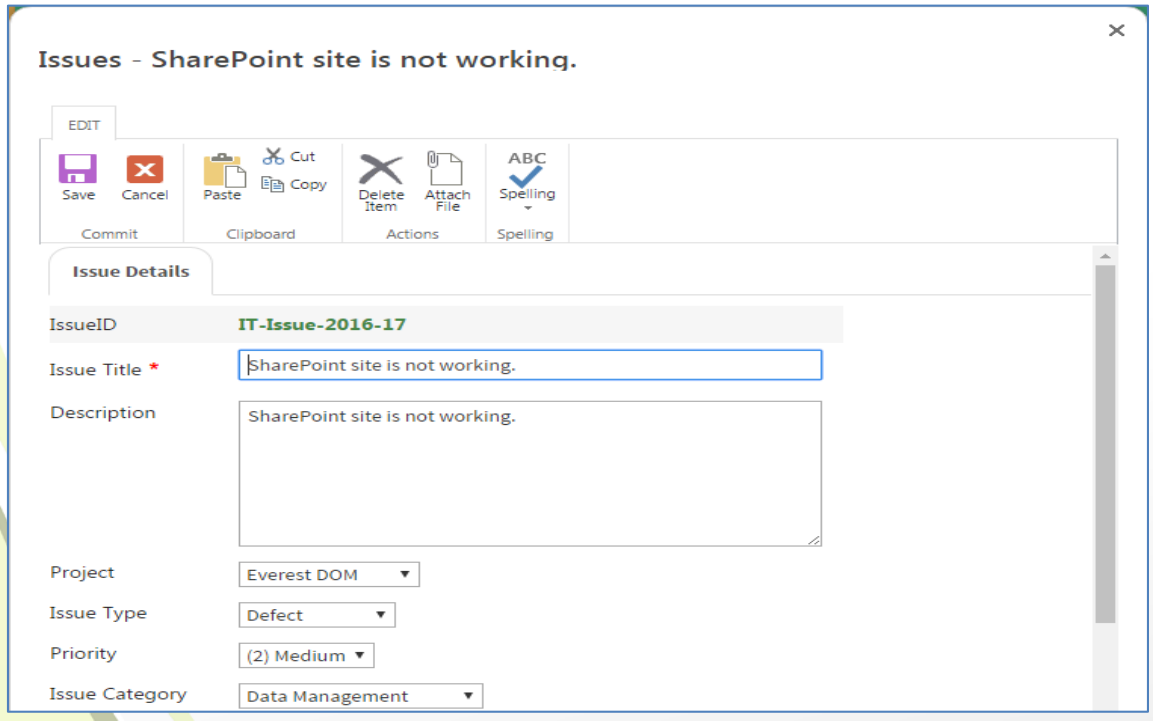
Previous | 1 | Next

You can change how many rows of data display by clicking the button at the top left. The default is **10**, but you can select **25**, **50**, or **All**.

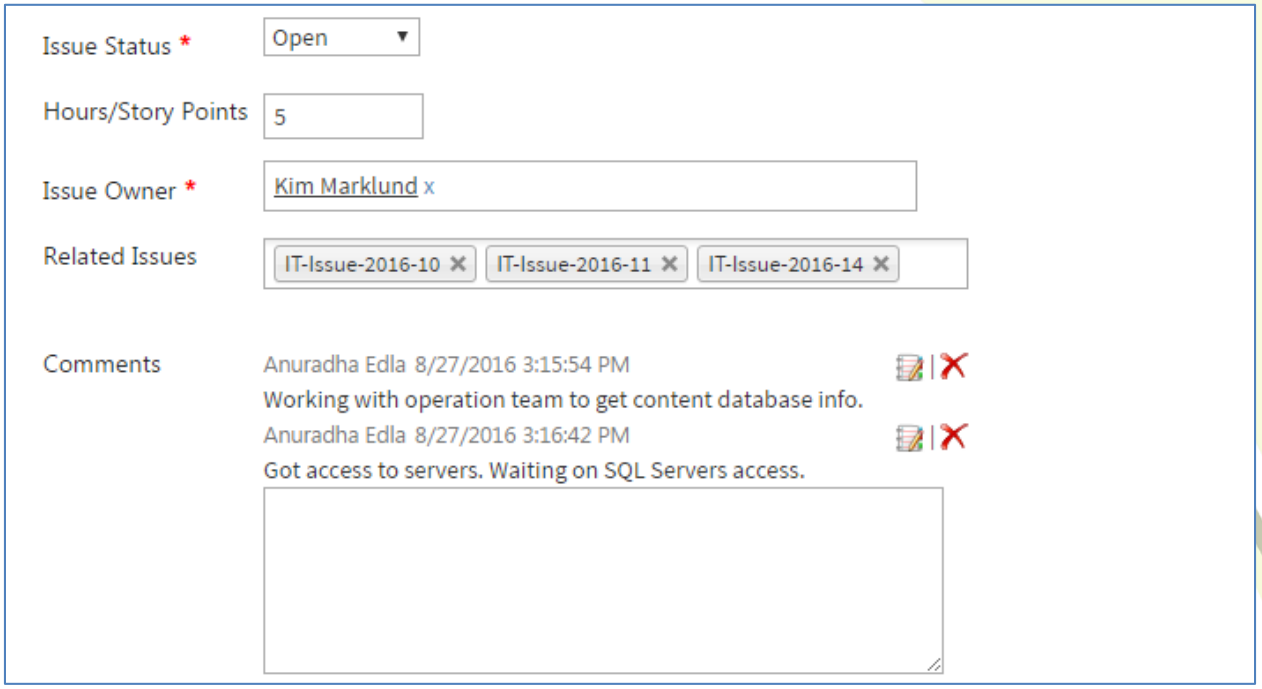
An **Edit** icon is located to the left of each Issue, which opens a form for the Issue, already in **Edit** mode. The **Delete** icon deletes the Issue, right from this screen.



If you click **Issue ID**, it takes you to the same form, but you're in **View** mode. You can, however, click **Edit Item** to make a change.



Comments section in the Issue form keeps track of Issues history logs. Support team members can update or delete their own comments.

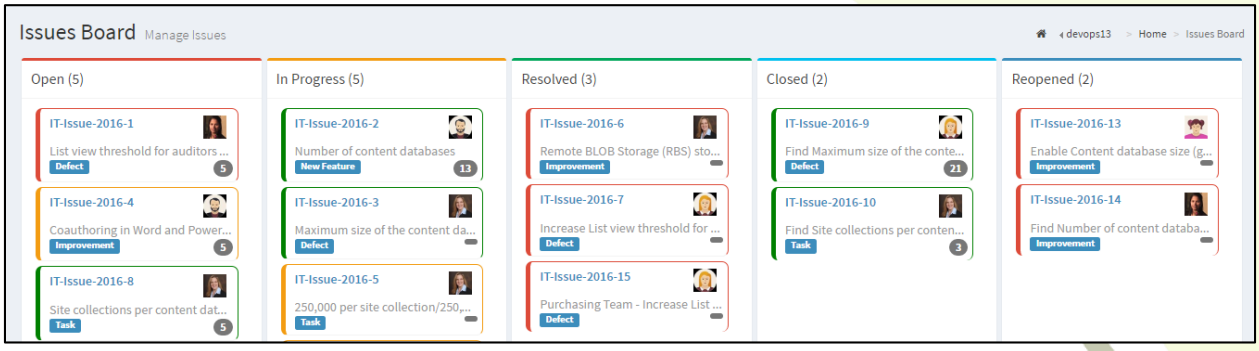


The column headings are sortable. Just click a heading. For example, let's say we want to sort the grid according to **Issue Category**, so I'll click that heading. You can refine it further by Ascending or Descending order –just click the icon beside the heading.

There is also a handy **Print** icon next to each line for quick printing of an individual Issue.

You can search for Issues with the Search field at the top right. Enter your search criteria here - just start typing –there is no need to click <Enter>. You can search for any text or number, and the Search looks in all columns.

Issues Board



Click **Issues Board** on the left to see ALL Issues in a visual display, **by Status**. Instead of opening an individual issue and changing its Status, you can drag and drop for quick editing. Resolving an issue is a simple **drag & drop**. Likewise, you can re-open a Closed issue with a simple drag & drop. An email notification will be sent to the user each time you change a Status, and the email will include a link to the issue.

This board also gives you a quick indication of who has the most Issues assigned to them.

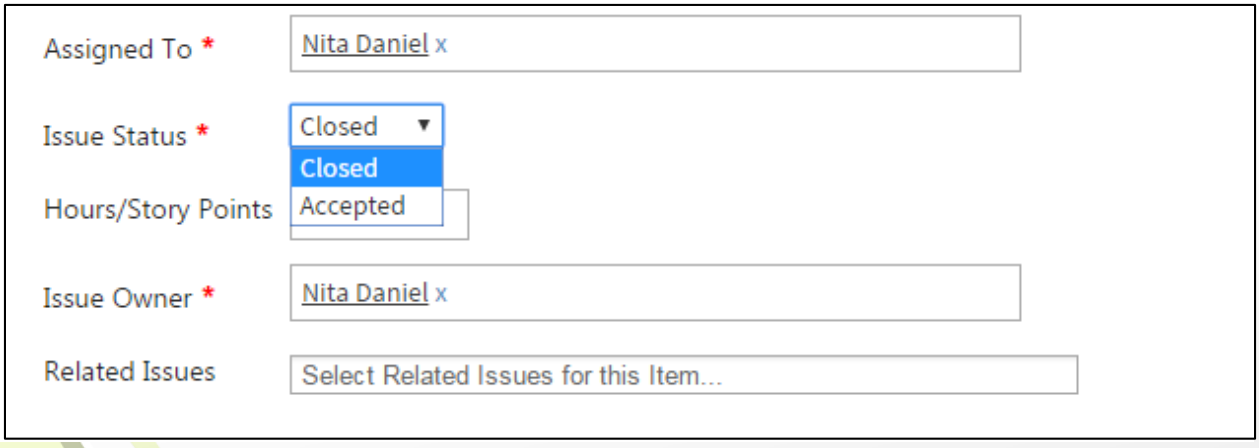
Click the **Issue ID** to see the details, or make changes. The same form opens that we saw before.

Accepting Issues

Once a issue has been changed to a Status of **Closed**, it can be Accepted

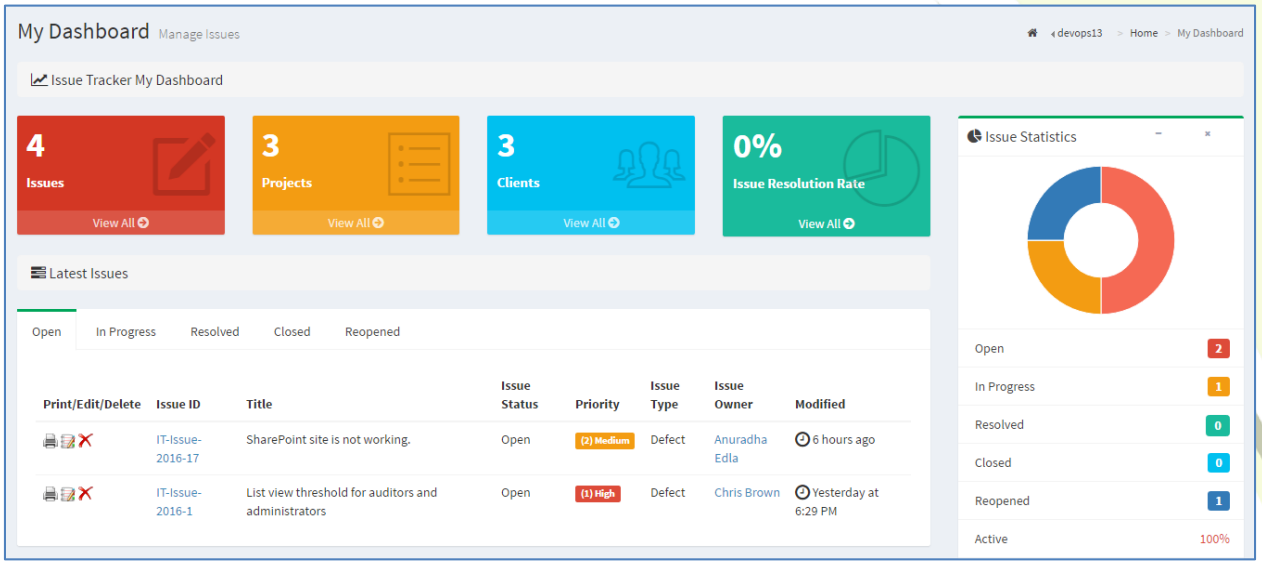
An Accepted option will become available in the **Issue Status** field, but only if the issue is set to **Closed** (for example, you won't see **Accepted** option available if the Status is **Resolved**).

Change the **Issue Status** to **Accepted**. Keep in mind, once a ticket is Closed or Accepted, it CANNOT be reopened. Only **Resolved** tickets can be reopened.

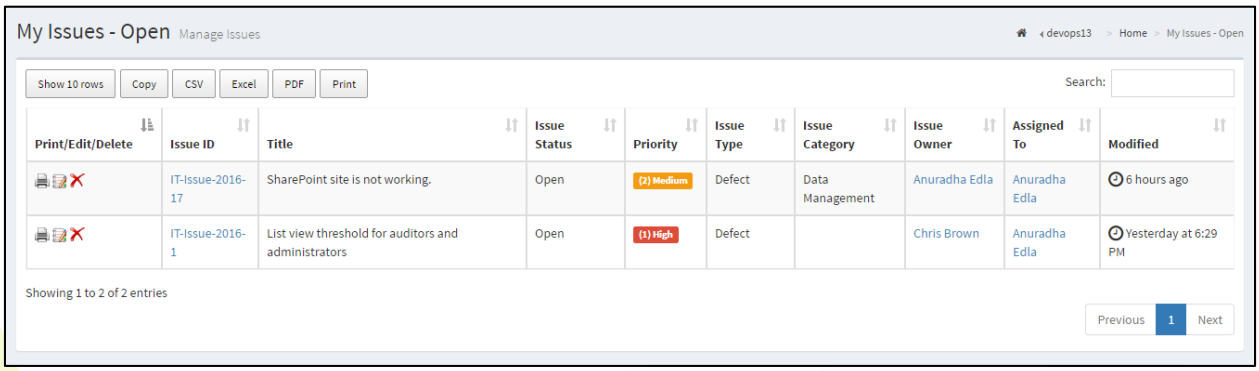


My Dashboard / My Issues / My Issues Board

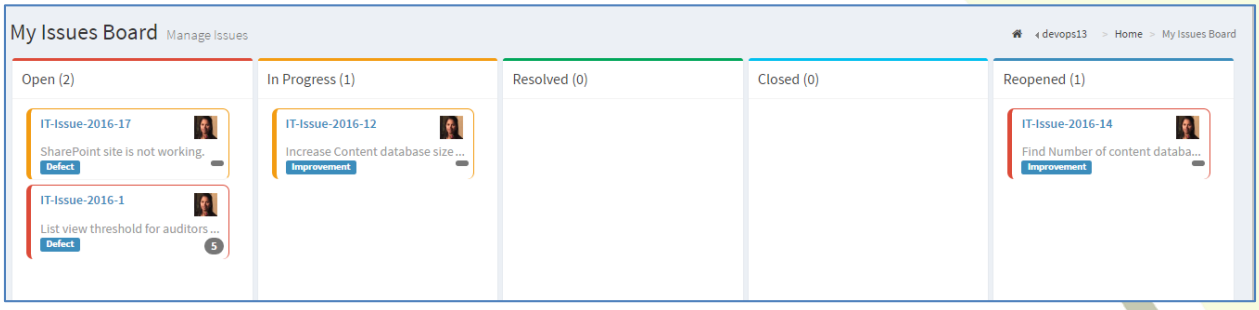
Click **My Dashboard** to see your own individual Issues and statistics. The same layout displays as we saw before, with a graph, pie chart, and bar chart, representing the same statistics, so there is a nice consistency.



Click **My Issues**, and then make a selection to see all your Issues for a particular Status. Again, the layout is consistent with the one we saw before, only this time it is for your own individual tickets. Click the **Edit** icon to open the form in Edit mode, or click the **Issue ID** to see the same form in View mode.

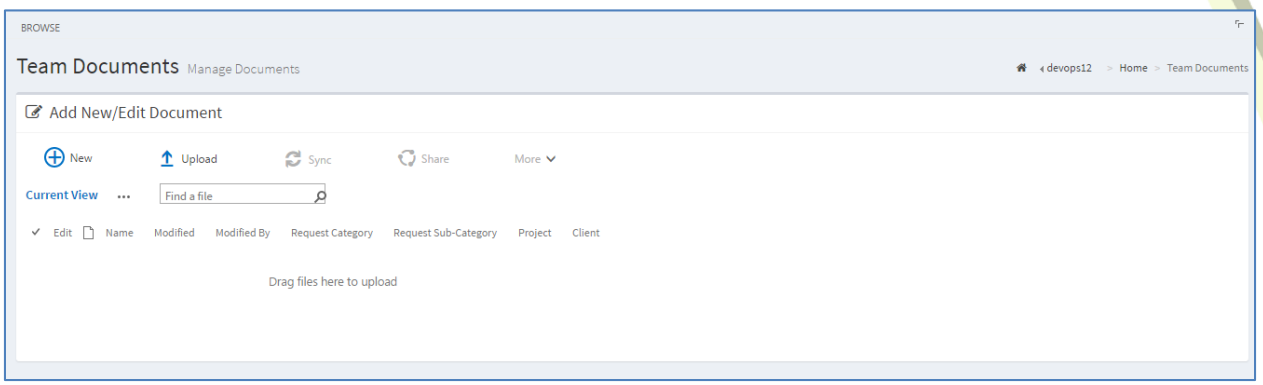


Click **My Issues Board** to see ALL your Issues. Here you can **drag & drop** to change Statuses, just as we saw before. Again, an email notification will be sent to the user when you change a Status, with a link to the issue.



Document Repository

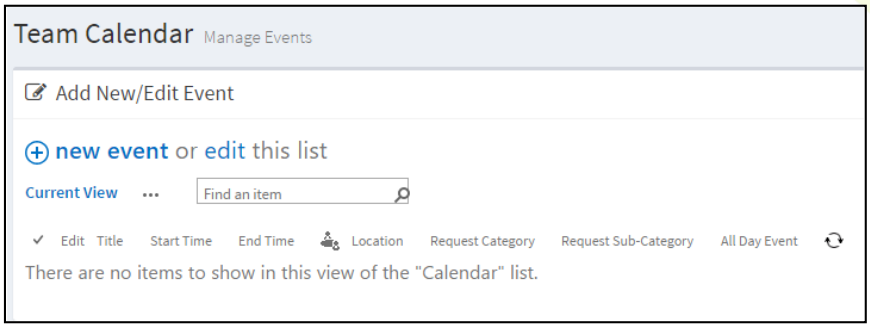
- You can upload & store documents for the Project team to share and use.
- Click **Team Documents**.



- To create a new Word document from where you are right now, click **New**.
- You can upload a document right to this location by using the **Upload** button. Click Choose File, navigation to the file location, click **Open**, and then **OK**. Fill out the fields in the form (required fields are indicated with an asterisk), then click Check In. Now you see your file in the list.
- Instead of clicking **Upload**, you can also drag & drop files from Windows Explorer right onto the page. I'll demonstrate that now: with Windows Explorer open, this is the file I want to upload, so I'll click it, then drag my cursor over the Chronodat Issue Tracker add-in, then just let go of the mouse. Now you see it in the list. You can see that it's checked out, meaning that it's still in a draft format, and no one else can edit it. If you are ready to check it in, click the ellipses beside it > click it again > **Advanced > Check In**.
- You can create folders, and create or upload documents under them. Just click **New** > **New Folder**.

Using the Team Calendar

- You can maintain a Team calendar in Chronodat. Click **Team Calendar**.



- To add an event to the Calendar, click **New event**.
- You could add a Team social event, system outages, freeze periods in your business (for example, no modifications can be made to any business applications during the December holidays), and so on.
- You can also upload a file to be added as an attachment to the event. You see the attachment only if you click on the event to view it.

You can click **Edit this list** to see a Quick Edit view, for making bulk updates in a spreadsheet-like view.

Security

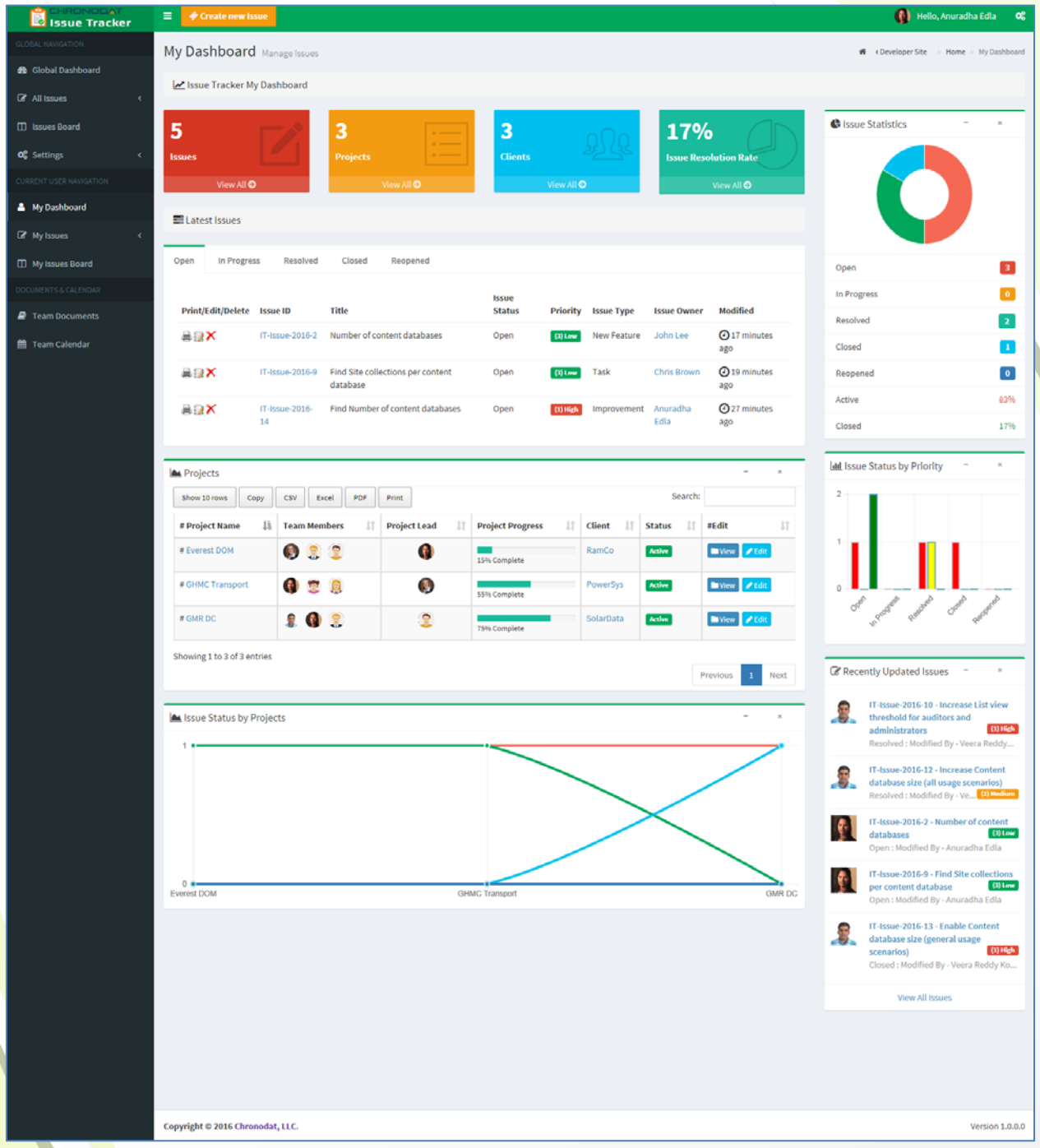
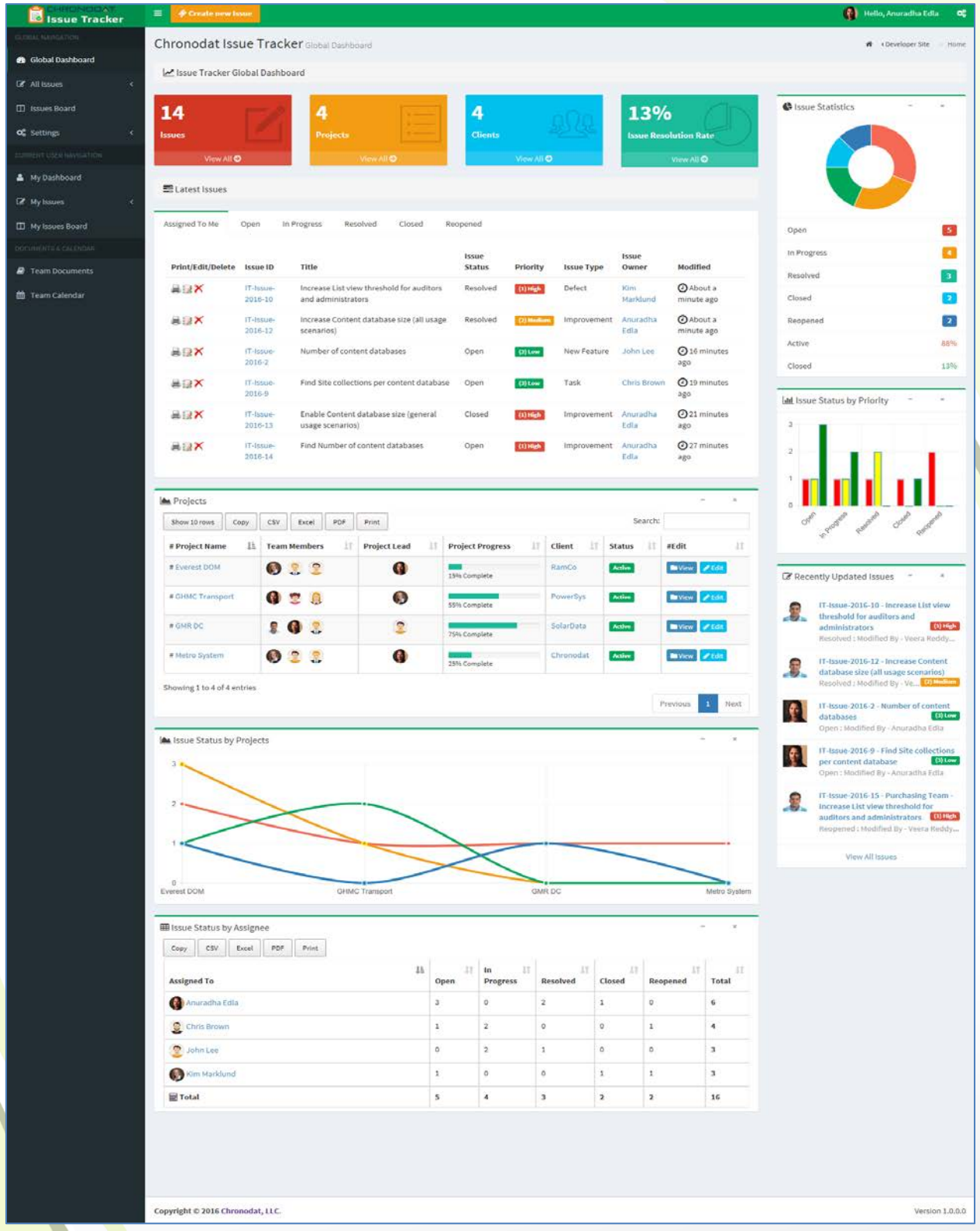
The Chronodat Issue Tracker add-in contains configurable access levels. Security is maintained by the Chronodat Admin, who can grant access by:

- Creating a **new Security group**
- Using any **existing SharePoint group** in the Parent site
- Creating access for a View-Only user

With the first 2 groups, the Admin can grant the group "Contribute" access (or higher), as well as Dashboard access. The members can **create Issues, edit/track Issues**, and view the Dashboards. All the functionality seen in this video is accessible.

Full Page UI for Non Admin Team (End Users)

For the **non-admin users**, this user can track & view their own Issues. The Dashboard access is limited, and displays only statistics showing his or her own Issues. The screen that the non-admin user works in will have fewer options in the left navigation bar, as shown here:



Dashboard/Home Page (Support Team)