



akuiteo
BUSINESS SOFTWARE

User Guide

SIMPLIFIED ISSUES

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1 Preface

Important

If you already use standard issues in the Help Desk module and would like to switch to simplified issues, contact your Akuiteo project manager to implement simplified issues in your company.

1.1 REVISIONS

Revision 1

Published in January 2022

- Updated the [Completing tasks \(p. 31\)](#) sub-chapter to define the next task.

1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

2 Introduction to simplified issues

The Help Desk module offered by Akuiteo enables users to process the issues brought externally by customers or internally by employees. This module has specific features to organize how an issue is processed by the different teams in a company. The simplified issues module makes it even easier to process issues thanks to a simplified interface that only contains the necessary fields and features.

The life cycle of an issue begins with its creation, whether it is created by a customer or an employee. Then, tasks must be created to start resolving the issue. After an issue has been resolved, it can be closed.

To save time when you need to create multiple issues with the same characteristics, you can create issues from templates. The templates created by a user can be shared with other users using template groupings.

Issues can be added to sprints to organize the workload of a team, depending on the number of employees available and the difficulty of each issue.

The simplified issues module can also handle multi-company issues, in cases where employees need to work on issues from multiple companies.

2.1 PREREQUISITES

The Help Desk module requires the following setup to display and use simplified issues:

- The **DEMANDE_SIMPLIFIEE** application control must be active.
- The **GM_FM_CR_AUTO** management rule must be disabled, as for standard issues.

To create a simplified issue, the record sheet of the customer involved in the issue must be set up correctly, with a contract, services, products, and so on.

2.2 ACCESS RIGHTS

The following DMFs are required to use some of the features of the simplified issues in the Help Desk module:

DMF 1426*	Accessing issues
DMF 1427*	Accessing sprints
DMF 140196	Setting up sprint templates
DMF 140197	Setting up issue stages
DMF 142601	Creating issues (p. 8)
DMF 142602	Editing issues (p. 15)
DMF 142603	Searching for issues (p. 22)

DMF 142604	Deleting issues
DMF 142610	Managing templates (p. 33)
DMF 142611	Sharing groupings (p. 36) with other users
DMF 142612	Publishing issues
DMF 142613	Changing context (p. 15)
DMF 142614	Entering time spent on tasks (p. 30) that are not assigned to the connected user
DMF 142615	Editing multiple issues at once (p. 23)
DMF 142616	Changing closed issues (see Changing statuses (p. 16))
DMF 142617	Deleting resolved issues
DMF 142618	Changing regression types for issues
DMF 142619	Putting issues on hold (p. 19)
DMF 142620	Putting closed issues on hold
DMF 142621	Canceling issues (p. 21)
DMF 142622	Searching for multi-company issues (p. 23)
DMF 142623	Changing statuses (p. 16)
DMF 142624	Counting checks/points (see Completing tasks (p. 31))
DMF 142625	Modifying templates and groupings of another employee.
DMF 142626	Creating issues From a template (p. 9)
DMF 142701	Creating sprints (p. 39)
DMF 142702	Changing sprints
DMF 142703	Deleting sprints (p. 43)
DMF 142704	Searching for sprints (p. 39)
DMF 142705	Starting sprints (p. 42) and Completing sprints (p. 43)
DMF 142706	Changing started sprints
DMF 142707	Canceling start of sprint
DMF 142708	Reactivating finished sprints
DMF 142709	Changing issues linked to a started sprint

3 Managing issues

Issues enable users to ask for assistance, to request evolutions or to submit bugs. Issues can be created directly by customers or internally.

All the necessary information is gathered in the issue to understand its context and work towards its resolution. Issues have a simplified interface: the sections and fields displayed are restricted to only have what is required and make reading and resolving issues easier.

3.1 CREATING ISSUES

Issues can be created:

- [From an empty issue \(p. 8\)](#) ;
- [From a template \(p. 9\)](#), to automatically retrieve values from the template and only edit the required fields;
- [By duplicating an existing issue \(p. 10\)](#).


Users can only create issues for the company they are connected with.

3.1.1 From an empty issue

1 From the top menu, click **Help Desk > New issue (simplified mode)**.

↳ The **New issue** screen opens.

2 In the **New issue** screen, fill in the following fields:

Field	Description
Customer	Select the desired item from the help list.
Site	The selection screens automatically follow on from each other to fill in the Customer, Site, Contact, Contract, Service, Product and Environment fields: <ul style="list-style-type: none">• If a customer only has one associated site, this site is automatically filled in and the following help list automatically displays the contacts associated with the site, and so on.• If a customer has multiple sites, the help list displaying these sites opens automatically, and so on.
Contact	
Contract	
Service	
Product	
Environment	If an alert memo is specified for the contract or service, the  icon is displayed at the right of the field. Click on the icon to learn more about the alert.
Severity	Select the issue severity from the help list. The severity enables customers to assess issues according to importance. The different levels of severity can be set up. A default value can be set up for each service.
Group	Select the group to associate with the issue from the help list.

Field	Description
	The selected group's members own the new issue. The different groups and members can be set up. A default value can be set up for each service.
Received on	Fill in the date and time when the issue was received. By default, this field displays the date and time when the issue's creation screen was opened.
I want to monitor the issue	Check this box to automatically add the connected user in the Monitored by field of the new issue.
Revision to be corrected = Last product revision	<p>Check this box to automatically add the last revision that is linked with the product's version in the Revision to correct field of the new issue.</p> <div> <p>Example</p> <p>Product version: 2.0.1</p> <p>Last revision: 2.0.15</p> </div>

3 When the fields are filled in, click **Validate**.

↳ The **Issue** screen opens. This screen is in modification mode and some fields must be filled in to be able to save the new issue and finish the creation process.

4 Enter a **Title** and a **Description**, then select the issue's **Type** from the help list. An issue type can be linked to the selected service and enables to categorize the issue. The different types can be set up.

5 Save the new issue.

↳ The issue is created. The new issue is automatically assigned a number and can be found from the search.

3.1.2 From a template

1 From the top menu, click **Help Desk > New issue from template**.

↳ The **New issue** screen opens.

2 In the **Groupings** section, make sure the grouping containing the desired template is checked. If the desired template belongs to an unchecked grouping, it will not be displayed in the **Templates** section.

3 In the **Templates** section, click on the desired template to create a new issue.

↳ The **New issue** window opens.

4 In the **New issue** window, enter the new issue's title and description. If the template contains a description, this description is reused automatically for the new issue.


Other fields can be displayed in addition to the title and description if some of the fields required to create an issue are not specified in the template.

5 There are two options available to confirm the creation from a template:

- Click **New**.
↳ The issue is created and is automatically assigned a number. A pop-up window displays the assigned number and the issue can be found from the search. The values entered in the template are reused, so the issue can be used directly.
- Click on **Create and fill in**.
↳ The issue is created and is assigned a number. The new issue opens automatically in modification mode. The values entered in the template are reused, so the issue can be used directly.

3.1.3 By duplicating an existing issue

A new issue can be quickly created by duplicating an existing issue.

To duplicate an issue, click on  in the issue's action bar. Information from the original issue is automatically reused for the new one, except for tasks and custom data.

3.2 DESCRIPTION OF THE ISSUE SCREEN


The issue screen contains four standard tabs:

1. The [Issue tab \(p. 10\)](#) that displays all information related to the issue and its tasks.
2. The [Tasks tab \(p. 15\)](#) that displays a detailed list of all the tasks linked to the issue.
3. The [Messages tab \(p. 15\)](#) that contains a messaging service to communicate with the customer about the issue.
4. The [Linked sprints tab \(p. 15\)](#) to manage the sprints linked to the issue.

3.2.1 Issue tab


Header section

Field	Description
Title	The title and number of the issue.
Status	<p>The status and state of the issue. These two values give information about the issue's life cycle to the customer, since they are displayed in the Customer Portal.</p> <p>The guaranteed response time (GRT) and guaranteed fault repair time (GFRT) counters are also displayed at the top right of the screen. These counters are only displayed when active.</p> <p>An issue's status indicates the progress in resolving the issue. A status can go through different states to get more details about the resolution. The actions available for an issue can depend on the issue's status, for example an issue can only be closed if its status is resolved.</p> <p>The different statuses and states can be updated automatically when tasks change (by setting up task types), but Changing statuses (p. 16) can also be done manually.</p>
Type	The type is linked to the selected service. It allows to categorize the issue from the customer side. The different types can be set up. A default value can be set up for each service.

Field	Description
Severity	<p>The severity enables customers to assess issues according to importance. The different levels of severity can be set up. A default value can be set up for each service.</p> <p>Depending on the setup of the maintained product linked to the issue, the  icon is displayed on the right if an alert reason is specified. To show the reason, hover over the icon or click on the label of the Severity field.</p>
Priority	The priority enables to organize issues by priority order, meaning it indicates if an issue must be processed immediately. It is assigned internally and cannot be viewed by customers. The different levels of priority can be set up.
Criticality	The criticality offers a second level to categorize issues according to importance, and depending on the customer's business needs. It is assigned internally and cannot be viewed by customers. The different levels of criticality can be set up.
Customer visible	<p>If the box is checked, the issue is displayed in the Customer Portal.</p> <p>If the box is not checked, the issue cannot be viewed in the Customer Portal.</p>


Description section


The **Description** section displays the issue's description, entered during the creation process. This section provides information and context about the issue.


Click on  to show the details of the description in a new window.

Linked documents section

The **Linked documents** section regroups the documents linked to the issue, for example a screen shot or a log file. There are two types of documents: external documents that are linked to the issue and can be viewed by customers, and internal documents that are hidden from the Customer Portal and can only be used internally.

To link an external document, drag the document and drop it in the issue screen. You can also click on  to open the file explorer and select the desired document.

To link an internal document, click on  to open the file explorer and select the desired document. Internal documents can be easily identified:


- From the **Linked documents** section in the main tab, internal documents are identified with the  icon.
- From the **Linked documents** tab, internal documents display **INTERNAL** in the **Filed under** field.

Tags section

Note

To show this section, you must activate the preference in **General > Help Desk > Issues and tasks > Show Tags section**.

The **Tags** section is used to manage the tags linked to the issue. Tags make it possible to search for and filter issues with multiple criteria that can be customized to your needs. Tags are set up from the menu **General setup > Cross-cutting > Tags**.


Click on  then double-click on the desired tag in the list to add it to the issue. It is possible to add as many tags as needed.

To remove a tag, click on .

Response section

The **Response** section enables users to describe the solution found for the issue and to provide resolution details to the contact:



- The **Customer response** can be viewed by customers from the Customer Portal, and users can write it and add to it at any time.
- The **Internal responses** are used internally to provide information that cannot be viewed by customers. This tab gathers all the content written in the **Internal information** field of each task.
- The **Messages** display all messages exchanged with the issue's customer and can also be viewed from the **Messages** tab.



Click on  to show the details of the responses in a new window.

In modification mode, click on  to add table texts.

Context section

The **Context** section regroups all the information about the issue's context. Click on a field's name to open the relevant record sheet.

Field	Description
Customer / Site / Manager	<p>The customer associated with the issue, the site related to the issue and the employee managing the issue.</p> <p>Click on the values displayed in blue to open the associated record sheet (customer, site and employee).</p>
Contract / Service	<p>The customer contract and the service linked to the issue.</p> <p>If an alert memo is specified for the contract, the  icon is displayed at the right of the field. Click on the icon to learn more about the alert.</p> <p>Click on the values displayed in blue to open the associated record sheet (contract and service).</p>
Assignment	<p>The issue's assignment.</p> <p>Click on the values displayed in blue to open the associated record sheet (project, phase, sub-phase and project task).</p>
Requester	<p>The contact who requested the issue. The email address and phone number of the selected user are displayed.</p> <p>Click on  to create a new contact and add it as the requester.</p>

Field	Description
User	<p>The user linked to the issue. The email address and phone number of the selected user are displayed.</p> <p>Click on  to create a new contact and add it as the user.</p>
Appt / Est. resolut..	<p>In the first date field, fill in the date and time to set up an appointment with the issue's customer. The date and time of the appointment are for informational purposes only but can be viewed by the customer on the Customer Portal.</p> <p>In the second date field, fill in the estimated resolution date of the issue.</p>
Monitored by	<p>The person in charge of monitoring the issue.</p> <p>In modification mode, click on  at the right of the field to assign the issue to yourself: the connected user's name (aka you) is filled in automatically. This option is not available if the connected user is already assigned to the issue.</p> <p>The list of employees available from the help list includes:</p> <ul style="list-style-type: none"> • the employees that belong to the company associated with the issue; • the employees that are multi-company managers. <p>Employees become multi-company managers if the Multi-company manager box is checked in their employee record sheet. This way, the employee can be associated with issues from multiple companies.</p> <div> <p>Note</p> <p>An employee with the Multi-company manager option can be assigned issues of other companies by these companies' employees, but cannot view all the issues of the other companies.</p> </div>
Product / Environment	The product and the environment related to the issue.
Revision to correct	The product's revision number where the problem described in the issue occurred or the evolution was needed.
Corrective revision	The product's revision number that contains the fixes or evolutions.
Filed under	The Domain / Module / Function of the issue.
Catalog 1 / 2	The customer references (free-form).

Regression section

The **Regression** section is only displayed if the **Extranet: activate regression tracking** box is checked for the service associated with the issue.

If the **Regression** box is checked, the problem described in the issue is considered a regression.

There are three types of regression:

- **Requested** if the customer checks the regression option when creating the issue from the Customer Portal;
- **Validated** if the regression is confirmed by the support team;
- **Refused** if the regression is not confirmed by the support team.

Custom data section

The **Custom data** section is only displayed if custom data are associated with issues and tasks.

Custom data are additional fields set up by Akuiteo users to meet their specific business needs. It is possible to create as many custom data as necessary to manage issues. These data can be accessed from specific tabs of the issue screen, but some custom data can also be displayed directly in the issue's main tab.

The custom data to be displayed are set up from the user preferences.

To do that, open **Edit > Preferences**, then go to **General > Help Desk > Issues and tasks**. The following fields enable users to display custom data:

Field	Description
Number of custom data columns	The number specified controls if the custom data are displayed in one or multiple columns. If you do not want to display custom data, enter 0.
Number of custom data	The number specified controls the number of custom data displayed. Enter 0 to display all existing custom data without having to enter a specific number (taking into account the limited space available to display these custom data).
First custom data index	<p>The number specified indicates the rank number of the first custom data to be displayed. The following custom data are displayed depending on their rank order, defined in the setup of these data.</p> <div> <p>Example</p> <p>The index specified is 1 and the Number of custom data is set to 4. The first custom data displayed in the issue screen will be the data whose rank number is 1, then 2, 3 and 4.</p> </div>

Task section

The **Task** section displays the details of the issue's latest task. This information was added when creating the task or during the task process.

Reference

For more information about managing tasks, refer to [Managing tasks \(p. 26\)](#).

3.2.2 Tasks tab

The **Tasks** tab displays a detailed list of all the tasks created for the issue. This tab offers an overall view of the tasks, without having to go through each task.

Tasks are not managed from this tab, but from the **Task** section in the main tab. Double-click on a task from the list in the **Tasks** tab to open the task directly in the main tab.

3.2.3 Linked sprints tab

The **Linked sprints** tab enables to associate sprints with the issue and to manage these sprints. The table displays the list of sprints that are already linked to the issue.

References

For more information about managing linked sprints from an issue, refer to [Managing sprints linked to issues \(p. 18\)](#).

For more information about managing sprints, refer to [Managing sprints \(p. 39\)](#).

3.2.4 Messages tab

The **Messages** tab contains a messaging service that is integrated with the issue.

This service enables to quickly and easily communicate with the customer, and limit the exchange to the issue's context. A customer wanting to discuss about another issue will have to do that directly from that issue to avoid misunderstandings.

In this tab, customers can also see any content entered in the **Visible information** field for the tasks that are externally visible.

3.3 EDITING ISSUES

When an issue is edited, some fields can be edited directly from the issue screen as usual. However, editing issues has the following characteristics:



- The **Customer / Site / Manager, Contract / Service** and **Product / Environment** fields cannot be edited directly from the issue's screen, but using a specific feature from the **Edit** menu. For more information, refer to [Changing context \(p. 15\)](#).
- The assignment cannot be edited directly from the issue's screen. For more information, refer to [Changing assignment \(p. 16\)](#).
- The status and state cannot be edited from the issue's screen, but using a specific feature from the **Edit** menu or the action bar. For more information, refer to [Changing statuses \(p. 16\)](#).

Users can only edit issues that were created for the company they are connected with.

3.3.1 Changing context


The context of an issue gathers the following fields: **Customer, Site, Contact, Contract, Service, Product, Environment, Severity** and **Type**.

The context is changed from the issue screen, in read-only mode.

- 1 To modify the context:
 - Click on  from the action bar.
 - From the issue screen, click on  on the right of the **Context** section.
 - Go to **Edit** > **Change the context**.
- 2 Edit the desired fields in the edit window.
- 3 Click on **Validate** to update the context.

3.3.2 Changing assignment

The assignment can be modified from the issue screen in modification mode only.

- 1 Click on  on the right of the **Assignment** field.
- 2 Edit the desired fields in the edit window.
- 3 Click on **Validate** to update the assignment.


3.3.3 Changing statuses

During the life cycle of an issue, the status and state are updated to reflect the issue's progress to customers and internally.

An issue state is for informational purposes only and is used to detail the issue's progress. However, an issue status can be associated with specific management rules. Task types can be set up so that, when a task is finished or created, the issue's status or state are updated automatically.

If needed, the status and state can also be changed manually. For example, changing the statuses of an issue enables to change the state associated with the issue's status, without having to change task types.

The issue status and state are changed from the issue screen, in read-only mode.

- 1 Click on  from the action bar or go to **Edit** > **Change issue statuses**.
- 2 Edit the desired fields in the edit window.
- 3 Click **Validate** to update the statuses.

Note

Depending on the current status and state of the issue, the fields are not filled in the same way in the edit window and some fields are not displayed.

Field	Description
Task	Displays the date and time when the issue was created. This field corresponds to the legal delay of response and enables to stop the GRT counter. This field can only be edited if the issue's status is "in progress".

Field	Description
Resolution	<p>Check the box to move the issue status to "resolved". The GFRT counter of the issue is stopped, and the issue is not displayed in the same tab on the Customer Portal.</p> <p>When the Resolution box is checked:</p> <ul style="list-style-type: none"> • The current date and time are filled in by default, but it is possible to enter a past or future date. • The New status is filled in with an "in progress" type of status. • The New state code is filled in with one of the states associated with the New status. <p>If the issue is already resolved, uncheck the box to cancel the resolution.</p> <p>This field can only be edited when the issue's status is "in progress" or "resolved".</p>
External closure	<p>Check the box to move the issue status to "closed by customer".</p> <p>When the External closure box is checked:</p> <ul style="list-style-type: none"> • The current date and time are filled in by default, but it is possible to enter a past or future date. • The New status is filled in with a "closed by customer" type of status. • The New state code is filled in with one of the states associated with the New status. <p>If the issue is already closed by the customer, uncheck the box to cancel the closure.</p> <p>This field can only be edited when the issue's status is "resolved" or "closed by customer".</p> <div> <p>Note</p> <p>During an external closure, the issue status displayed in the Customer Portal is "closed" but it is still possible to add tasks to the issue.</p> </div>
Internal closure	<p>Check the box to move the issue status to "closed internally".</p> <p>When the Internal closure box is checked:</p> <ul style="list-style-type: none"> • The current date and time are filled in by default, but it is possible to enter a past or future date. • The New status is filled in with a "closed internally" type of status. • The New state code is filled in with one of the states associated with the New status. <p>If the issue is already closed internally, uncheck the box to cancel the internal closure and go back to a "closed by customer" status.</p> <p>This field can only be edited when the issue's status is "closed by customer" or "closed internally".</p> <div> <p>Note</p> <p>During an internal closure, there is no more action available for the issue.</p> </div>
New status	<p>Displays the list of available statuses depending on the current status of the issue or on the values specified in the different fields of the window.</p>

Field	Description
New state code	Displays the list of states associated with the New status .

3.4 MANAGING SPRINTS LINKED TO ISSUES

Sprints can be linked from an issue. When an issue is linked to a sprint:


- the issue's progress is managed in the sprint's context using issue stages;
- the complexity can be used to assess the workload of an issue inside a specific sprint.

The sprints linked to an issue are managed in the **Linked sprints** tab of the issue screen.

3.4.1 Linking a sprint to an issue

Important

An issue cannot be linked to a completed sprint.

1 In the **Linked sprints** tab, click  on the right of the **Issue/Sprint links** section.

↳ The **Link a sprint** window opens.

2 In the **Link a sprint** window, fill in the following fields:



Field	Description
Sprint	Select a sprint from the help list. This sprint will be linked to the issue.
Issue	Displays the issue's number. The sprint will be linked to this issue.
Issue stage	Select the stage from the help list. The issue stage shows the issue's progress inside the sprint. This value is not related to the issue's status and state.
Issue complexity	Enter a value to assess the workload of the issue inside the sprint. This workload is determined by users depending on the team's needs: the workload's unit can be in days, in hours, in difficulty levels, and so on. The value entered is added to the Total capacity field available in the sprint's main tab. The Total capacity field is filled in automatically by adding all the complexity values of all the linked issues. This capacity is also displayed as a percentage on the right: "X% of the issue's Max. capacity is used".

3 When the fields are filled in, click **Validate**.

↳ The selected sprint will be linked to the issue. The links are displayed in a table in the **Linked sprints** tab of the issue, as well as in the **Linked issues** tab of the sprint.

3.4.2 Editing linked sprints


To edit a sprint linked to an issue: in the **Linked sprints** tab of the issue, click  for the desired sprint.

The issue stage inside the sprint can be updated directly from the table in the **Linked sprints** tab. Use the  and  arrows to update the stage.

Note

If the **Issue complexity** field is changed for an issue, the sprint's **Total capacity** is also updated.

3.4.3 Deleting linked sprints

To delete a sprint linked to an issue: in the **Linked sprints** tab of the issue, click  for the desired sprint.

Note

If the **Issue complexity** field was specified for the issue in the deleted sprint, the sprint's **Total capacity** is updated.


3.5 PUTTING ISSUES ON HOLD

An issue can be put on hold to let the customer know the issue is paused because it cannot be processed as it is. The GRT and GFRT counters are stopped until the issue is resumed.

Example

An issue is created at 2 am, outside of office hours. The GRT and GFRT counters start at 9 am. You call your customer at 9:42 am to ask for more information but nobody answers. To avoid exceeding the delay of response, you must put the issue on hold until the customer answers. Once you get an answer, you can resume the task.

An issue is put on hold from the issue screen, in modification mode or not.

- 1 Click on  from the action bar or go to **Edit > Put issue on hold**.
- 2 In the window, fill in the required fields.
- 3 Click **On hold** to put the issue status "on hold" and stop the counters.

Note

An issue cannot be put on hold when it is resolved or closed.

Field	Description
Start date	Displays the date and time when the issue will be put on hold.

Field	Description
Expected end date	Enter the date and time when you expect to resume the issue. This date is for informational purposes only because the issue must be resumed manually.
On hold reason	Select the reason why the issue is put on hold from the available values in the drop-down list. The different reasons can be set up and enables to explain why an issue is put on hold.
Details (customer visible)	Add any details to explain why the issue is put on hold. This comment can be viewed by the customer on the Customer Portal.
Appointment date	Fill in the date and time to set up an appointment with the customer about the on hold reasons. This appointment is for informational purposes only but can be viewed by the customer on the Customer Portal.
New status	Displays the list of statuses available to put an issue on hold.
New state code	Displays the list of states associated with the New status .

Once the reasons for putting the issue on hold have been resolved, the issue must be resumed manually. An issue "on hold" can be resumed from the issue screen, in modification mode or not.

- 1 Go to **Edit > Resume issue**.
- 2 In the window, fill in the required fields.
- 3 Click **Resume** to cancel the issue's "on hold" status and restart the time counters.

3.6 CLOSING ISSUES

When an issue is resolved, it can then be closed. The issue can be:

- Closed by customer, which is done by the customer from the Customer Portal or, if needed, by someone in the company from the Application Desktop.
- Closed internally, which is done from the Application Desktop.

When an issue is closed by a customer or internally, the issue is archived: it is displayed in a specific tab of the Customer Portal and it is excluded by default from search results.

When a customer closes an issue from the Customer Portal, the closure comment is added as a message in the issue's **Messages** tab (if a comment is entered).

A "resolved" issue is closed from the issue screen:

- From the issue in modification
Click **Close** in the **Task** section, then confirm the closure. When an issue is closed, the last active task is automatically completed as well. However, an issue cannot be closed if it has more than one non-completed task.
- Using the [Changing statuses \(p. 16\)](#) feature

3.7 CANCELING ISSUES

Important

Canceling an issue cannot be reversed.

An issue can be canceled at any time. Canceling an issue indicates it cannot be processed or resolved.

An issue is canceled from the issue screen, in modification mode or not.

- 1 Go to **Edit > Cancel**.
- 2 In the window, fill in the required fields.
- 3 Click **Validate** to cancel the issue.

Note

In the cancellation window, the **Visible via the help desk extranet** box enables to display (checked box) the issue on the Customer Portal or to hide it (unchecked box).

4 Searching for issues

Existing issues can be accessed using the issue search screen. This screen enables users to set search criteria in order to get the list of all the issues matching these criteria.

To open the search screen, go to **Help Desk > Issue search** from the top menu.

This search screen works just like all the other search screens available in Akuiteo. Search criteria are combined with AND operators: for example, you can search for all the issues associated with the A customer AND with an *On hold* status type.

Reference

For more information about research in Akuiteo, refer to the *User Interface Guide*.

4.1 DESCRIPTION OF THE SEARCH SCREEN

The issue search screen displays a simplified search interface, with only the relevant search criteria to simplify the process of searching for issues. This search screen makes it possible to search for tasks or issues, depending on the option checked in the **Searched objects** section.

The search screen only includes one standard tab, the **Main criteria** tab. This tab gathers all the necessary criteria to search for simplified issues.

The **Main criteria** tab contains the following sections:

Section	Description
Searched objects	Criteria to define which type of objects to search for.
Issue	Criteria related to issues.
Task	Criteria related to tasks. By default, the task status is set to In progress .
Status types	Checkboxes to set the issue statuses to include in the search.
Project	Criteria related to projects.
Sprint	Criteria related to sprints. An issue can be added to a sprint to manage the issue's life cycle inside the sprint. If the Issues linked to sprint box is checked, search results display additional columns with information related to sprints. If an issue is associated with two sprints, search results will display two lines for this issue, one per sprint.
Other properties	Criteria to search for customer references.
Multiple	Multiple criteria to combine different criteria related to issues and tasks.

Section	Description
criteria	<p>In the search screen, all the other criteria are combined with AND operators. However, these multiple criteria are combined with OR operators.</p> <div> <p>Example</p> <p>You want to search for issues associated with the A customer, but only the ones with an "on hold" OR "resolved" status type. To do this:</p> <ol style="list-style-type: none"> 1. Enter the customer name in the Customer field of the Issue section. 2. Select the ISSUE - Status code criteria from the drop-down list in the Multiple criteria section. 3. Add the first status type ("on hold") using the help list, then add the second status type ("resolved") the same way. ↳ The two status types are displayed one after the other in the table of the Multiple criteria section. 4. Start the search. </div>

4.2 SEARCHING FOR MULTI-COMPANY ISSUES

There are two criteria available in the issue search screen to search for issues from multiple companies:

- The **All companies** checkbox in the **Issue** section makes it possible to display issues from all companies in the search results;
- The **ISSUE - Company** criteria in the **Multiple criteria** section makes it possible to search for issues from specific companies.

Issues that belong to other companies are displayed in gray and in italic to visually separate them from the issues of the connected user's company. However, a user can only access the issues created for the company he/she is currently connected with.

Important

To open and manage issues from another company:

- a user must have the appropriate rights to switch from one company to another by changing connection settings, and still access issues with the same rights;
- a user must have a secondary user (associated with the other company) to switch from one company to another by changing connection settings, and access issues with different rights (but with at least the right to access the Help Desk module).

4.3 EDITING MULTIPLE ISSUES AT ONCE

When an issue search is done, the search results are displayed in the **Result issues** screen. From these search results, it is possible to edit multiple issues, tasks or custom data (associated with issues) at once.

- 1 Select one or multiple lines in the search results.

- 2 Right-click on the selection, then click one of the following options depending on the changes needed:

- **Edit multiple issues**
- **Edit multiple tasks**
- **Edit multiple custom data**

↳ The edit window opens.

Note

The fields available in the edit window depend on the option and the items selected. For example, the fields available to edit multiple issues at once are not the same as the ones displayed to edit tasks.

- 3 To change a field for all the items selected, check the corresponding box then enter the new value. To set a field to zero, check the box but leave the field empty.

- 4 When the fields are filled in, click **Validate**.

↳ The selected items are edited all at once.

Important

If the box of a field is not checked, its new value will not be taken into account.

Note

In the edit window, the grayed-out fields cannot be edited for multiple items at once. A field can be grayed out if the lines selected are not relevant. For example, if you select multiple tasks with different task types, the **Type** field will be grayed out so you will not be able to edit it.

4.4 LINKING MULTIPLE ISSUES TO SPRINTS AT ONCE

When an issue search is done, the search results are displayed in the **Result issues** screen. From these search results, it is possible to link a sprint to multiple issues at the same time.

The workload of a team can be managed using sprints. For more information, refer to [Managing sprints](#) (p. 39).

Important

An issue cannot be linked to a completed sprint.

- 1 Select one or multiple lines in the search results, then right-click on the selection and click **Link to sprint**.

↳ The **Link the selected issues to a sprint** window opens.

2 In the window, fill in the following fields:

Field	Description
Sprint	Select a sprint from the help list. This sprint will be linked to all the selected issues.
Stage	Select the start stage from the help list. This stage will be allocated to all the selected issues. The issue stage shows the issue's progress inside the sprint.
Assessment	Enter a value to assess the workload of the selected issues inside the sprint. This workload is determined by users depending on the team's needs: the workload's unit can be in days, in hours, in difficulty levels, and so on. The assessment will be applied inside the sprint to all the selected issues.

3 When the fields are filled in, click **Validate**.

↪ The sprint is linked to the selected issues. The links are displayed in a table in the **Linked sprints** tab of each issue, as well as in the **Linked issues** tab of the sprint.

5 Managing tasks

When an issue is created, the first task must be added to show the issue is being processed. Tasks must be created and completed to process the issue and resolve it. These tasks can be for classification, software development, quality control, and so on.

A task represents an action that must be done to contribute in resolving an issue. A task can be assigned to a work group or to a specific employee. Employees can enter their time spent on tasks directly from the task section of an issue to save time. When a task is done, it is completed and the next task is created. This way, the issue's progress is managed internally using tasks.

5.1 SETTING UP TASKS

Two types of data must be set up to manage multi-company issues:

- [Task types](#) (p. 26);
- [Work groups](#) (p. 26).

5.1.1 Task types

A task type can be created for the ***** company to have the same type available in all the companies and for all the employees. To create task types that will be available in all the companies when a task is created or changed, the user must be connected using the ***** company.

If the **Multi-company assignment** box is checked in an employee record sheet, this employee can be assigned tasks for issues of multiple companies. If a task type is created for the ***** company or for any other company, this employee can be selected as **Default assignment**.

If the task type is created for the ***** company, the following fields only display values that are set up for the ***** company:

- **Action**
- **Default type for next task**
- **Work group**
- **Default assignment**
- **Default status**
- **Default state code**
- (Filter by) **Issue type**
- (Filter by) **Product type**
- (Restrict to) **Work groups**

5.1.2 Work groups

A work group can be created for the ***** company to group employees from different companies. To create work groups that will be available in all the companies when a task is created or changed, the user must be connected using the ***** company.


If the **Multi-company manager** box is checked in an employee record sheet, this employee can be set as a manager in multiple companies. If a work group is created for the ***** company or for any other company, this employee can be selected as the **Manager**.

If the **Multi-company assignment** box is checked in an employee record sheet, this employee can be assigned tasks for issues of multiple companies. If a work group is created for the ***** company or for any other company, this employee can be selected when adding members to the group.

5.2 CREATING TASKS

Note

Tasks can only be created inside of an issue.

- 1 From the main tab of the issue in modification mode, click on  at the top right of the **Task** section.

↳ A new empty task is added to the issue, with the task number incremented by 1.

- 2 Fill in the following fields:


- The task's **Type**, for example a task for classification or software development. The different task types can be set up and linked to specific issue states.
- The task's work **Group**. This work group indicates the team in charge of the task. The different work groups can be set up.

The **Type / Group** fields are the only ones required to save the issue and therefore create the new task. The other fields can be filled in later on.

- 3 Save the issue to create the task.

Note



During the creation process and as long as the issue has not been saved, the task can be canceled. Once the issue has been saved, the task can only be deleted.



To cancel the task, click on  at the top right of the **Task** section. The creation process is canceled and the task disappears.






5.3 DESCRIPTION OF THE TASK SECTION



In the main tab of the issue screen, the **Task** section displays all the information about the last task created. This information was added when creating the task or during the task process. For the input task, that is to say the task number 0, the **Type / Group**, **Assigned to** and **Expected on** fields are the only ones displayed because the other fields are not used for this task type.

The icons located on the right of the **Task** section can be used for the following actions:

- To display the other tasks created for the issue, use the left  and right  arrows to switch from task to task.

- To send a task by email or fax, click on .
- To create a new quotation using the task's information or to open the record sheet of the associated quotation, click on .


Field	Description
Type / Group	<p>The task type enables to categorize the task and the work to be done. Resolving an issue requires to go through multiple task types. These tasks can be for classification, software development, quality control, and so on. The different task types can be set up.</p> <p>The task group enables to assign the task to a work group. The different work groups can be set up.</p>
Assigned to	<p>The employee assigned for the task, meaning the employee who is working on the task to complete it and move the issue forward.</p> <p>The list of employees available from the help list includes:</p> <ul style="list-style-type: none"> • the employees that belong to the company associated with the issue; • the employees who can be assigned tasks for issues of multiple companies. <p>However, this list of employees can be restricted to the members of the work group selected. Edit the issue and click on  to display the group's members, select the desired employee then validate.</p> <p>When the issue is in modification mode or not, you can click on  to assign the task to yourself, signifying that you are currently working on the task. The Assigned to field is automatically filled in with your name and it cannot be changed. If needed, click on  to free the task.</p> <p>For an employee to be assigned tasks for issues of multiple companies, the Multi-company assignment box must be checked in this employee's record sheet. This way, the employee can be associated with issues from multiple companies.</p> <div> <p>Note</p> <p>An employee with the Multi-company assignment feature can be assigned to issues from multiple companies. However, this feature on its own does not give the employee access to all the issues from all the companies.</p> </div>
Visible externally	<p>If the box is checked, any content written in the task's Visible information field can be viewed as messages by the customer, on the Customer Portal and in the issue's Messages tab.</p> <p>If the box is not checked, the task information cannot be viewed by the customer.</p>
Expected on	The expected end date of the task.
Visible information	<p>The task-related information to let the customer know about the issue's progress.</p> <p>If the Visible externally box is checked, this information can be viewed as messages by the customer, on the Customer Portal and in the issue's Messages tab.</p> <p>Click on  to show the detailed content in a new window.</p> <p>In modification, click on  to add table texts.</p>

Field	Description
	<p>To quickly add an image as an attachment:</p> <ol style="list-style-type: none"> 1 Copy the image to the clipboard. 2 In modification, press CTRL+V in the Visible information field. <p>↳ The image is automatically added in Akuiteo as a linked document of the issue. The Show XXX linked document indication is also added to the Visible information field.</p>
Internal information	<p>The internal task-related information to give details about the actions carried out and how the issue is processed.</p> <p>This information can only be viewed internally. The Internal information of each task is automatically added to the Internal responses in the Response section.</p> <p>Click on  to show the detailed content in a new window.</p> <p>In modification, click on  to add table texts.</p> <p>To quickly add an image as an attachment:</p> <ol style="list-style-type: none"> 1 Copy the image to the clipboard. 2 In modification, press CTRL+V in the Internal information field. <p>↳ The image is automatically added in Akuiteo as a linked internal document of the issue. The Show XXX linked document indication is also added to the Internal information field.</p>
Timesheet	<p>Enables to quickly enter the time spent on a task. Click on the field's name to open the current week's timesheet for the connected user.</p> <div> <p>Reference</p> <p>For more information, refer to Entering time spent on tasks (p. 30).</p> </div>
Next type	<p>The type of the next task can be added:</p> <ul style="list-style-type: none"> • manually by the employee; • automatically depending on the current task's type. <p>For each task type, it is possible to set up a default type for the next task so that the Next type field is automatically filled in.</p>
Total time	The total time spent on the task. This field is automatically filled in by adding up all the time entered for this task.
Scheduled	The time initially scheduled to complete the task.
Remaining	The time remaining to complete the task.

5.4 ENTERING TIME SPENT ON TASKS

Time spent on a task can be entered directly from the issue screen. There are two ways to enter time spent on a task:

- [Direct time entry \(p. 30\)](#) to enter time with just one click.
- [Detailed time entry \(p. 30\)](#) to open a window to enter time spent, already filled in with all the information from the issue.

The time spent by all employees on all the tasks of the issue can be displayed as a list. Go to **Edit > Linked timesheets** or click on  from the action bar of an issue, when it is not in modification.



To change the time entered for a task, go to **My Akuiteo > My timesheet**.

Note

An employee can have to be assigned tasks for issues associated with another company:


- If the **Multi-company assignment** box is checked in the employee record sheet, the employee can enter time for a task directly from the issue associated with another company. The time entry will be added to the timesheet for the employee's company.
- If the box is not checked, the employee cannot enter time for issues associated with another company.

5.4.1 Direct time entry


- 1 From the issue screen, display the desired task in the **Task** section.
- 2 Enter the time spent on the task in the **Timesheet** field, then click on  at the field's right.
 The time is automatically added to the timesheet of the connected user, on the current day. The **Project**, **Phase**, **Sub-phase** and **Project task** fields are filled in automatically using the issue information. If these fields are empty for the issue, they must be manually filled in before entering the time spent on tasks.

5.4.2 Detailed time entry

The detailed time entry is done in the time entry window to have more control over the values entered and change fields if needed.

- 1 From the issue screen, display the desired task in the **Task** section then click **Enter...**
 The **Enter your time spent on this task** window opens.
- 2 In the **Enter your time spent on this task** window, fill in the following fields:
 - the **Date** to use for the time entry (current day by default);
 - the **Duration** of the time spent on the task.

The other fields are filled in with the issue's information, however the values can be changed if needed.

To remove the values filled in all at once, click on  at the top right of the **Timesheet** section.

The **Templates** section displays the list of the user's quick entries. Click on a quick entry to automatically fill in the fields in the **Timesheet** section.

The **Weekly time spent** section displays an overview of the time spent by the user during the week of the task's **Date**. The time spent on the current task can be adapted depending on the weekly overview, for example if the daily number of work hours should not be exceeded.

- 3 When the fields are filled in, click **Validate**.

↳ The time is added to the timesheet for the connected user, on the specified day.

5.5 COMPLETING TASKS

Completing a task means its purpose has been carried out and the issue can be moved forward, by creating new tasks or closing the issue.


Note


Completed tasks can still be changed.

Before completing a task, make sure to add some details about the task in the [Visible information \(p. 28\)](#) or [Internal information \(p. 29\)](#) fields. If these fields are empty, the task cannot be completed and an error message is displayed if you attempt to do so.


To complete a task:

- 1 Enter the time spent on the task in the **Time input** section. This step is optional. If the time spent is not already entered, a message is displayed when completing the task to remind the user to do so.
- 2 Fill in the information about the next task in the relevant section:

Field	Description
Type / Group	<p>Select the type then the work group of the next task from the help lists.</p> <p>If the current task's type is set up with a default type for the next task, this type is automatically filled in the Type field.</p> <p>Similarly, if the next task's selected type is set up with a default group, this group is automatically filled in the Group field.</p>
Assigned to	<p>Select the employee assigned to the next task from the help list. If there is a default assigned employee for the selected type, this employee is filled in by default.</p> <div><p>Tip</p><p>Click on  on the right of the Group field to only display in the help list the employees that are members of the selected work group.</p></div>

3 Click on  **Complete** then confirm the completion.

↳ The task is completed. The issue screen is updated. Depending on the setup for this new task's type, the issue's status and state can be changed automatically.

It is also possible to use checks or points from the menu **Edit > Count checks** or by clicking on  from the action bar.

Reference

To adapt an issue's status and state, see [Changing statuses \(p. 16\)](#).


5.6 DELETING TASKS

Important

Deleting a task cannot be reversed.

A task can only be deleted if:

- The task is in progress. A completed task cannot be deleted.
- The task is not the only one in progress for the issue. If a task is the last non-completed task in an issue, it cannot be deleted.

1 From an issue screen when it is not in modification mode, display the desired task in the **Task** section then click on .

2 Confirm the deletion.

↳ The task is deleted. The task numbering is not updated when a task is deleted: the deleted task's number will be missing from the issue's task list.

6 Managing templates

Templates make it possible to create multiple issues without having to fill in the same information every time. The issue fields are filled in once and the values are saved in a template. Then, new issues can be created quickly using the existing templates.


Templates are organized in groupings to help users categorize their templates and share them with other employees.

Templates and groupings are managed from the same screen. This screen also enables users to create new issues using templates. To open the **New issue** screen, go to **Help Desk > New issue from template** from the top menu.

6.1 CREATING TEMPLATES

Important

A template must be created inside a grouping.

- 1 There are three ways to create a template:
 1. A template can be created from an existing issue.
In the issue screen, go to **Edit > New template** from the top menu. The template's creation window displays the issue's information. The desired values can be changed before saving the template.
 2. A template can be created manually starting from an empty template.
In the **New issue** screen, click on  in the **Templates** section. The fields in the template's creation window are empty and must be filled in before saving the template.
 3. A template can be duplicated.
In the **New issue** screen, right-click on an existing template and click **Duplicate template**. The template's creation window displays the original template's information. The desired values can be changed before saving the template.
- 2 No matter how a template is created, the fields that must be filled in to create it are identical to the issue fields, except for the **Identity** section. This section must be filled in during the creation process for each new template:

Field	Description
Code	Enter a code to identify the template. This code must be unique. If the automatic numbering is set up for templates, this field can be left empty because the code will be determined automatically when the template is created.
Rank	Enter a rank number to determine the position in which the template is displayed inside its grouping.

Field	Description
	If the field is left empty, the rank number is determined automatically and the new template is displayed after the other existing templates.
Label	Give a name to the template.
Grouping	Select the desired grouping from the help list. This list only shows the groupings created by the user.

3 When the fields are filled in, click **Validate**.

↳ The template is created and displayed in the **Templates** section of the **New issue** screen. The new template is located in the sub-section that corresponds to the selected grouping.

6.2 EDITING TEMPLATES

1 In the **New issue** screen, right-click on the desired template in the **Templates** section, then click **Edit template**.

↳ The edit window opens. The fields available are the same as the fields for [Creating templates](#) (p. 33).

2 In the edit window, change the desired fields then click **Validate**.

↳ The template is updated.

6.3 DELETING TEMPLATES

Important

Deleting a template cannot be reversed.

1 In the **New issue** screen, right-click on the desired template in the **Templates** section, then click **Delete template**.

2 Confirm the deletion.

↳ The template is deleted.

7 Managing template groupings

Issues can be created quickly using templates. These templates are categorized in groupings: to create a template, you must create its grouping first.

A grouping can contain one or multiple templates and is used to organize these templates depending on user-defined categories. A grouping must be selected to display and use its templates.

A user who creates a grouping becomes its owner. The grouping is not displayed to other users, unless it is shared with them.



Templates and groupings are managed from the same screen. This screen also enables users to create new issues using templates. To open the **New issue** screen, go to **Help Desk > New issue from template** from the top menu.


7.1 CREATING GROUPINGS

1 In the **New issue** screen, click on  in the **Groupings** section.

↳ The creation window opens.

2 In the creation window, fill in the following fields:

Field	Description
Code	Enter a code to identify the grouping. This code must be unique. If the automatic numbering is set up for groupings, this field can be left empty because the code will be determined automatically when the grouping is created.
Color	Click on the field to select a color. The color selected will be used as a background color for the grouping and for all its templates. Click on  to remove the selected color.
Valid until	Enter a validity end date. After this validity date has passed, the grouping will be automatically archived.
Label	Give a name to the grouping.
Linked work groups	This section is used to share the grouping with one or multiple work groups. It makes it possible to share the grouping with all the work group members at once, without having to link each employee individually. For more information, refer to Sharing groupings (p. 36) . To link a work group, select the desired group from the help list of the Work group field. The linked group is displayed in the table of the Linked work groups section. To remove a linked work group, select it from the table then click on  . Work groups are groups of employees, gathered together because they belong to the same team or work on the same projects. Work groups can be assigned to specific tasks to process

Field	Description
	issues.
Linked employees	<p>This section is used to share the grouping with one or multiple employees. For more information, refer to Sharing groupings (p. 36).</p> <p>To link an employee, select the desired employee from the help list of the Employee field. The linked employee is displayed in the table of the Linked employees section.</p> <p>To remove a linked employee, select it from the table then click on .</p>

3 When the fields are filled in, click **Validate**.

↳ The grouping is created and displayed in the **Groupings** section.

7.2 SHARING GROUPINGS

A grouping can be shared with one or multiple [Linked work groups \(p. 35\)](#) or [Linked employees \(p. 36\)](#). When a grouping is shared with other employees, it enables them to:

- view the grouping;
- create new issues from the templates included in the grouping.

However, employees cannot edit, archive and delete groupings that are shared with them, unless they have the DMF 142625. They also cannot use these shared groupings to create new templates, or to edit, duplicate and delete the templates included.

Note

A grouping shared by another user can be easily identified: the grouping is displayed in italic font and the owner's user ID is added in brackets.

7.3 EDITING GROUPINGS

1 In the **New issue** screen, right-click on the desired grouping in the **Groupings** section, then click **Edit grouping**.

↳ The edit window opens. The fields available are the same as the fields for [Creating groupings \(p. 35\)](#).

2 In the edit window, change the desired fields then click **Validate**.

↳ The grouping is updated.

7.4 SELECTING / DESELECTING GROUPINGS

When a grouping is selected, the templates included in this grouping are displayed in the **Templates** section. If multiple groupings are selected, the templates are categorized in sub-sections that show each grouping's name and background color.

If a grouping is not selected, the templates included in this grouping are hidden from the **Templates** section and cannot be used.

To select a grouping, check the grouping's corresponding box in the **Groupings** section of the **New issue** screen. To deselect a grouping, uncheck its box.

7.5 ARCHIVING GROUPINGS

Note

A grouping with no templates included in it cannot be archived, it can only be deleted.

Archiving groupings enables users to hide a grouping without having to delete all the templates included in it.

When a grouping is archived:

- by default, it is no longer displayed in the **Groupings** section;
- its templates are not displayed in the **Templates** section;
- it cannot be used to create new templates.

To archive a grouping:

- 1 In the **New issue** screen, right-click on the desired grouping in the **Groupings** section, then click **Archive grouping**.
- 2 Confirm the archiving.

↳ The grouping and its templates are no longer displayed by default.

To display archived groupings again, click on  in the **Groupings** section. Archived groupings are grayed out but can still be used. If an archived grouping is selected, its templates are displayed again in the **Templates** section.

To cancel the archiving of a grouping:

- 1 In the **New issue** screen, right-click on the archived grouping in the **Groupings** section, then click **Edit grouping**.
- ↳ The edit window opens.

- 2 In the edit window, remove the **Valid until** date or enter a date in the future, then click **Validate**.

↳ The grouping is no longer archived.

7.6 DELETING GROUPINGS

Important

Deleting a grouping cannot be reversed.

Note

A grouping with templates included in it cannot be deleted, it can only be archived.

- 1 In the **New issue** screen, right-click on the desired grouping in the **Groupings** section, then click **Delete grouping**.
- 2 Confirm the deletion.
↳ The grouping is deleted.

8 Managing sprints

Sprints are used to manage the workload in order to process help desk issues. A sprint represents a period of time and is associated with issues. The number of issues depends on the number of employees available and the difficulty assessed for each issue.

Stages can be used to track how issues are progressing inside a sprint as accurately as needed.

8.1 SETTING UP SPRINTS

Two types of data must be set up to use sprints:

- issue stages inside a sprint;
- sprint templates.

Reference

For more information about setting up sprints, refer to the *Setup Guide - Advanced Setup*.

8.2 SEARCHING FOR SPRINTS

Existing sprints can be accessed using the sprint search screen. This screen enables users to set search criteria in order to get the list of all the sprints matching these criteria.

To open the **Sprint search** screen, go to **Help Desk > Sprint search** from the top menu.

This search screen works just like all the other search screens available in Akuiteo.

Reference

For more information about research in Akuiteo, refer to the *User Interface Guide*.

8.3 CREATING SPRINTS

Sprints can be created:

- [From an empty sprint \(p. 39\)](#) ;
- [By duplicating an existing sprint \(p. 40\)](#).

8.3.1 From an empty sprint

- 1 From the top menu, go to **Help Desk > Sprint search** to open the search screen, then click on  in the action bar.

↳ The **Sprint** screen opens.

- 2 In the **Sprint** screen, fill in the following fields:


Field	Description
Code	Enter a code to identify the sprint. This code must be unique.
Sprint template	<p>Select a sprint template from the help list.</p> <p>A sprint template defines the different stages each issue will have to go through inside the sprint. The template also defines the order of these stages. This way, the template enables users to define the order once and to quickly create new sprints.</p>
Label	Give a name to the sprint.
Period	Enter the start and end dates for the sprint. This period is for informational purposes only.
Status	<p>This field is always grayed out and cannot be modified. It shows the sprint status depending on the actions taken.</p> <p>The sprint status can be:</p> <ul style="list-style-type: none"> • Pending if the sprint is either in the process of creation or created but not started yet; • Started if the sprint is started but not completed yet; • Completed if the sprint is completed.
Max. capacity	<p>Define the sprint's maximum capacity. This field is optional and enables users to associate a maximum workload with a sprint. The value specified (integer number) is defined arbitrarily by users to suit their specific needs.</p> <div> <p>Example</p> <p>A manager creates a sprint for the development team. He sets the sprint's maximum capacity to 20. He adds issues to the sprint and determines the workload for each issue: 1 for issues that will be quickly resolved, 2 for issues that are easy to resolve but will take more time, and 3 for complex issues. When the total capacity reaches 20, the sprint's maximum capacity is reached and the manager does not add any more issues to it.</p> </div>
Total capacity	This field is only displayed and filled in if the Max. capacity field is specified. This field is automatically filled in by adding up all the workload assessment made for each issue.
Description	Describe the sprint. This description is optional.

3 When the fields are filled in, save the sprint.

↳ The sprint is created and can be associated with issues.

8.3.2 By duplicating an existing sprint

A new sprint can be created quickly by duplicating an existing sprint.

To duplicate a sprint, click on  in the sprint's action bar. The details of the original sprint are filled in automatically. The **Code** must be filled in and be different from the original sprint's code since it must be unique. The issues linked to the original sprint are not included in the new sprint.

8.4 MANAGING ISSUES LINKED TO SPRINTS

Issues can be linked from a sprint. When an issue is linked to a sprint:

- The issue's progress is managed in the sprint's context using issue stages;
- The issue's capacity is determined in the sprint's context;
- The issue's priority, which is different for each issue, is displayed in the sprint's context to sort the issues by priority;
- The person assigned to the last non-completed task is displayed for each issue.

The issues linked to a sprint are managed in the sprint's **Linked issues** tab.

The number of linked issues is also displayed in the main tab: an [X linked issue\(s\)](#) link is displayed to access the **Linked issues** tab.

8.4.1 Linking issues to sprints

Important

An issue cannot be linked to a completed sprint.

1 In the **Linked issues** tab, click on  on the right of the **Issue/Sprint links** section.

↳ The **Link issue** window opens.

2 In the **Link issue** window, fill in the following fields:

Field	Description
Sprint	Displays the sprint's code. The issue will be linked to this sprint.
Issue	Select an issue from the help list. This issue will be linked to the sprint.
Issue stage	Select the stage from the help list. The issue stage shows the issue's progress inside the sprint. This value is not related to the issue's status and state.
Issue complexity	Enter a value to assess the workload of the issue inside the sprint. This workload is determined by users depending on the team's needs: the workload's unit can be in days, in hours, in difficulty levels, and so on. The value entered is added to the Total capacity field available in the sprint's main tab. The Total capacity field is filled in automatically by adding all the complexity values of all the linked issues. This capacity is also displayed as a percentage on the right: "X% of the issue's Max. capacity is used".

3 When the fields are filled in, click **Validate**.

↳ The sprint is linked to the selected issue. The links are displayed in a table in the **Linked issues** tab of the sprint, as well as in the **Linked sprints** tab of the issue.

8.4.2 Linking multiple issues to sprints at once

When you need to link multiple issues to a sprint, adding them one by one can take some time. For example, if multiple issues have not been completed inside a sprint, these issues need to be quickly transferred to another sprint.


- 1 Open the **Linked issues** tab in the new sprint. The sprint must not be in modification.
- 2 In the issue search screen, fill in the relevant criteria to find the issues to be transferred, then start the search.
- 3 From the search results, select the desired issues, drag them to the new sprint and drop them in the table.



Important

The sprint and the search results must both be displayed.

↳ The selected issues are linked to the sprint. The links are displayed in a table in the **Linked issues** tab of the sprint, as well as in the **Linked sprints** tab of the issues.

8.4.3 Editing linked issues


To edit an issue linked to a sprint: in the **Linked issues** tab of the sprint, click on  for the desired issue.

The issue stage inside the sprint can be updated directly from the table in the **Linked issues** tab. Use the  and  arrows to update the stage.

Note

If the **Issue complexity** field is changed for an issue, the **Total capacity** is also updated.

8.4.4 Deleting linked issues

To delete an issue linked to a sprint: in the **Linked issues** tab of the sprint, click on  for the desired issue.

Note

If the **Issue complexity** was filled in for the deleted issue, the **Total capacity** is updated.

8.5 STARTING SPRINTS

When a sprint is started, it means the sprint is in progress and the linked issues are being processed.

To start a sprint, click on **Start sprint** from the sprint's main tab.

When a sprint is started:

- The **Status** field is changed to **Started**.
- The start date and the employee who started the sprint are displayed at the right of the **Started** status.
- The linked issues cannot be changed once the sprint is started (unless the user has the appropriate rights).

To cancel the start of a sprint, open the **Edit** menu from the sprint screen then click **Cancel sprint start**. The sprint goes back to its previous status, before it was started.

8.6 COMPLETING SPRINTS

Note

A sprint can only be completed after it has been started.

When a sprint is completed, it means the sprint cannot be used anymore and the linked issues have been resolved (or linked to new sprints).

To complete a started sprint, click on **End the sprint** from the sprint's main tab.

When a sprint is completed:

- The **Status** field is changed to **Completed**.
- The completion date and the employee who completed the sprint are displayed at the right of the **Completed** status.
- The sprint and the linked issues cannot be modified.

To cancel the completion of a sprint, open the **Edit** menu from the sprint screen then click **Cancel sprint completion**. The sprint goes back to its previous status, before it was completed.


8.7 DELETING SPRINTS

Important

Deleting a sprint cannot be reversed.

Note

A sprint cannot be deleted if it is linked to issues.

- 1 From the desired sprint, click on  in the action bar.
- 2 Confirm the deletion.
 - ↳ The sprint is deleted.