



**akuiteo**  
BUSINESS SOFTWARE

General Guide

# AGILE FACTORY

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# 1 Preface

## 1.1 REVISIONS

<b>Revision 2</b>	Published in February 2022 <ul style="list-style-type: none"><li>• Added display options and details about the sprint search in the <a href="#">Accessing sprints (p. 10)</a> sub-chapter.</li><li>• Updated the <a href="#">Accessing user stories (p. 13)</a> sub-chapter.</li></ul>
<b>Revision 1</b>	Published in November 2021

## 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 Agile Factory

Agile Factory is a dedicated web interface to manage software developments. Agile Factory is designed to meet the specific needs of development teams so they can manage their backlog and the functional upgrades using sprints. Developers can see all their tasks, input their time and manage their sprints from a web browser, without having to open the Application Desktop.

Agile Factory has two views:

- The  **Board** view is used to manage the different sprints, to create user stories and to add cards.
- The  **Backlog** view is used to access and process help desk tasks.

### Important

Agile Factory is compatible with the following browsers: Chrome, Safari, Firefox and Microsoft Edge Chromium.

# 3 Accessing Agile Factory

## 3.1 LOGGING IN



- 1 In a web browser, enter the address in the following format:  
*https://domainname/servername/apps/agile-factory/* or open the Launcher to access the Agile Factory.

### Example

*https://www.akuiteo.com/akuiteo/apps/agile-factory/*

### Note

To access Agile Factory from the Launcher, the link to the application must have been initialized from the Administration console. For more information, refer to the *General Guide - Launcher*.

- 2 In the login window, fill in the **Login** and the **Password**. If needed, click on  to show the password.
- 3 Click on **Log in**.  
 Agile Factory opens. The two tabs on the left of the screen enable you to access the **Board** and **Backlog** views.

## 3.2 CHANGING THE LANGUAGE

To change the interface's language, click on the connected user's picture in the header then click on the flag for the desired language. The interface is automatically changed in the selected language.

## 3.3 CHANGING THE THEME

To change the color theme of the interface, click on the connected user's picture in the header, then click on the Dark or Light theme. The interface automatically displays the selected theme.

## 3.4 LOGGING IN AS A SECONDARY USER

If secondary users are linked to the account of the connected user, it is possible to log in to Agile Factory as a secondary user.

- 1 Log into the portal as a main user.
- 2 Click on the connected user's picture in the header, then click on **Secondary users**.

↪ A list containing the codes of the main and secondary users is displayed. The code of the connected user is shaded.

3 Click on the code of the secondary user of your choice.

↪ Agile Factory is updated automatically and you are now connected with the account of the selected user. The sprints and issues displayed and the rights applied depend on the secondary user selected.

#### Note

If the main user account is not linked to any secondary users, the **Secondary users** option is not displayed.

## 3.5 LOGGING OUT

To log out from the portal, click on the connected user's picture in the header, then click on **Logout**.



# 4 Setting up Agile Factory

## 4.1 ACCESS RIGHTS

The following DMFs are required to use some features in Agile Factory:

Code	Domain	Module	Function
24****	AGILE FACTORY	*	*
2401**	AGILE FACTORY	BOARD	*
240101	AGILE FACTORY	BOARD	BOARD VIEW
240102	AGILE FACTORY	BOARD	ADD US TO STARTED SPRINT
240103	AGILE FACTORY	BOARD	MODIFY US
240104	AGILE FACTORY	BOARD	MODIFY SPRINT
240105	AGILE FACTORY	BOARD	START SPRINT
240106	AGILE FACTORY	BOARD	COMPLETE SPRINT
240107	AGILE FACTORY	BOARD	MODIFY CARD
2402**	AGILE FACTORY	BACKLOG	*
240201	AGILE FACTORY	BACKLOG	BACKLOG VIEW

## 4.2 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*.

## 4.3 PREFERENCES

To access the preferences, click on the connected user's picture in the header, then click on **Preferences**. These preferences enable you to define:

- the first custom data index and the number of custom data to be displayed in the task form;
- the default action codes for each day of the week, used when entering time spent on tasks.

To define a preference, enter a value in the desired field then click on **Save**. Click on  on the right of a preference to remove the value specified.


# 5 Managing sprints

Sprints represent a period of time during which a team carries out a number of tasks. The duration of a sprint depends on the team's needs and the expected upgrades. Sprints are divided into user stories (US), that are used to describe the different user needs that must be addressed during the sprint.

Sprints are created using a sprint template. This template is set up from the Application Desktop and determines the sprint's format, meaning the different columns available to represent the progress stages.


## Example

You have set up a sprint with 4 columns: *To do*, *Doing*, *To be validated* and *Done*. During the sprint, the cards will be moved through each progress stage. Cards that are moved to the last stage are considered completed.

Sprints are managed from the **Board** view. To access it, click on the  tab on the left of the Agile Factory's screen.

## 5.1 ACCESSING SPRINTS

To access a specific sprint, click on the **Board** tab then select the desired **Sprint** from the drop-down list:

- This list shows the sprints that are pending (not started) or in progress (started), however the completed sprints are not displayed.
- The sprints displayed in the list are sorted depending on the sprint's dates, from the most to the less recent. Sprints with no dates are displayed last in the list.
- Sprints that are started are identified with the  icon.

The user stories associated with the selected sprint are displayed in a table format, and the sprint's columns depend on the sprint template.

When a sprint is selected, the following information is displayed in the screen's header:

- the sprint's dates, only displayed if the dates are filled in for the sprint;
- the **Sprint capacity**, only displayed if a maximum capacity is filled in for the sprint;
- the number of **Completed cards** compared to the total number of cards in the sprint;
- the number of **Completed user stories** compared to the number of US added to the sprint;
- the sprint's **Completed workload**, meaning the total assessment for the cards that are in the last progress stage compared to the total assessment for all the cards.

Display options are used to highlight some cards or user stories in a sprint, or modify the way items are displayed in the sprint. These options are found in the sprint's header, above the columns. Click on an option to enable or disable it. Disabled options are shaded.

Display option	Description
<b>My cards</b>	When the option is enabled, the cards assigned to the connected user are the only ones displayed.
<b>Recently updated &lt;=24 H</b>	When the option is enabled, the cards modified recently (24 hours or less) are the only ones displayed.
<b>Pending cards</b>	When the option is enabled, the cards that are in a <i>Pending</i> column are the only ones displayed.
<b>Completed cards</b>	When the option is enabled, the cards that are in a <i>Completed</i> column are hidden.
<b>Reduce user stories / Expand user stories</b>	Click on <b>Expand user stories</b> to show the cards' details for all US at once, or click on <b>Reduce user stories</b> to hide the cards.

## 5.2 CREATING SPRINTS

**1** From the **Board** tab, click on  then on **New sprint**.

**2** Fill in the following fields:

Field	Description
<b>Code</b>	Enter a code to identify the sprint. This code must be unique.
<b>Sprint template</b>	<p>Select a sprint template from the drop-down list.</p> <p>Sprint templates are set up from the Application Desktop and define the different stages each card 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>
<b>Label</b>	Give a name to the sprint.
<b>Period from.. To</b>	Enter the start and end dates for the sprint. This period is used for the Burndown Chart.
<b>Max. capacity</b>	<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><b>Example</b></p> <p>A manager creates a sprint for the development team. He sets the sprint's maximum capacity to <i>100</i>. When he adds cards to the sprint, he assesses each card's workload from <i>1</i> to <i>21</i>, depending on how complex the task is and how long it should take to process. When the total capacity reaches <i>100</i>, the sprint's maximum capacity is reached and the manager does not add any more cards to it.</p> </div>
<b>DMF</b>	<p>Add a DMF to restrict the access to the sprint. This way, the sprint can only be accessed by users with the corresponding DMF.</p> <p>This DMF can be an existing DMF or an optional DMF set up from the Application Desktop.</p>
<b>Description</b>	Describe the sprint. This description is optional.

3 Click on **Save**.


↳ The new sprint is created and is directly displayed in Agile Factory.



## 5.3 MODIFYING SPRINTS

To modify an existing sprint, click on  then on **Modify the sprint**. Modify the desired information then click **Save**.

## 5.4 STARTING SPRINTS

When a sprint is started, it means the sprint is in progress and the cards included in the sprint's US are being processed.

To start a sprint, click on  then on **Start the sprint**, and confirm it.

To cancel the start, click on  then on **Modify the sprint**. Click on  on the top right of the sprint form then confirm the cancellation. The sprint goes back to its previous status, before it was started.

## 5.5 COMPLETING SPRINTS

### Important

Completed sprints cannot be accessed from Agile Factory.

Therefore, the completion of a sprint can only be canceled from the Application Desktop.

When a sprint is completed, it means the sprint cannot be used anymore and the linked cards can no longer be moved. The cards that have not been completed can be moved to another sprint before completing the sprint (refer to [Moving cards \(p. 18\)](#)).

To complete a started sprint, click on  then on **Complete the sprint**, and confirm it.

## 5.6 DELETING SPRINTS

### Important

Deleting a sprint cannot be reversed.

To delete a sprint, click on  then on **Modify the sprint**. Click on **Delete** then confirm the deletion.


# 6 Managing user stories

User stories (US) are used to divide a sprint into several use cases. A US describes a functional user need that must be addressed during the sprint.

A US in Agile Factory matches an issue in the Application Desktop's Helpdesk module. A US contains one or several cards, that represent the different development tasks required to carry out the US. When a US is added to a sprint, a card is automatically created with it because a US must include cards. If all the cards included in a US are deleted or moved, this US will be automatically deleted: a US is primarily a grouping of cards.

## Note

The same US can have cards in multiple sprints.

US are managed from the **Board** view. To access it, click on the  tab on the left of the Agile Factory's screen.

## 6.1 ACCESSING USER STORIES

To access the US, click on the **Board** tab then select the desired sprint. The user stories associated with the sprint are displayed in a table format, and the sprint's columns depend on the sprint template.

From the display options in the sprint's header, click on **Expand user stories** to show the cards' details for all US at once, or click on **Reduce user stories** to hide the cards. You can also click on the header of a specific US to show or hide its cards.

If you want to hide all the cards of a column to simplify the display for example, click on the arrow on the right of the column's header. The column is reduced and the cards are hidden, but the number of cards is displayed in brackets for each US (that contains cards). Click again on the arrow on the right of the header to show the cards of this column.

To modify how the US are ordered, click on a US's header then drag and drop it to the desired location.

For each US, the completed workload is displayed on the header's right: *Completed workload: X (completed workload)/Y (total workload)*.

- The total workload is the sum of all the assessments defined for each card in the US.
- The completed workload is the sum of the assessments defined for the cards that are in the sprint's last column.

The banner's color displays the state of each US:

- The banner is light gray when the US has not been started yet, meaning all the cards of the US are in a *Pending*-type column.
- The banner is dark gray when the US is in progress, meaning at least one card of the US is in an *In progress*-type column.
- The banner is green when the US is completed, meaning when all the cards of the US are in a *Completed*-type column.

## 6.2 CREATING USER STORIES

US can be created:



- From a [template \(p. 14\)](#) of a simplified issue, created from the Application Desktop, to automatically retrieve all the values already specified;
- From an [existing user story \(p. 14\)](#).

### 6.2.1 From a template

A template is used to create similar simplified issues without having to fill in the same values multiple times. It is included in a template grouping that can be shared with specific employees or work groups.

#### Note

If a template is crossed out, it means it is not detailed enough to be used in Agile Factory. To be able to use this template in Agile Factory, the owner must fill in the template's missing values in the Application Desktop.

- 1 From the desired sprint, click on **+ US** then on **From a template**.  
 The **Select your template** window opens to display the different templates set up in the Application Desktop.
- 2 Select the desired template.
- 3 Fill in the US's **Title** and **Description** if needed.
- 4 Click on **Add**.  
 The US is created and is added to the sprint. A first card is automatically added to the US, in the first column. The card's name is the same as the US's.

#### Reference

For more information about simplified issues and templates, refer to the *Simplified issues General Guide*.

### 6.2.2 From an existing user story

A new US can be created from an existing simplified issue, in order to retrieve the issue's information to create the US.


- 1 From the desired sprint, click on **+ US** then on **From an existing user story**.
- 2 In the **Select a user story** window, search for and select the desired issue from the **User story** field:
  - You can search for an issue by entering its number or label.
  - You must enter at least 5 characters to start the search.
  - The issues that match the searched characters are displayed directly after 5 characters.


**3** Fill in the first card's **Title** and **Comment** if needed.

**4** Click on **Add**.

↳ The US is created and is added to the sprint, with the first card filled in.

## 6.3 MANAGING USER STORIES

To modify a US, click on  on the right of the desired US's header. The US form opens on the screen's right. Modify the desired information then click **Save**.

To quickly copy information from the US, click on  on the top right of the form, then select:

- Copy issue name
- Copy branch name
- Copy link

### 6.3.1 Sending messages

From the US form, it is possible to send an email to the desired recipients in order to discuss about the US.

**1** From the US form, click on .

**2** Fill in the following fields:

Field	Description
<b>To</b>	Add one or multiple employees, or enter the recipients' email addresses.
<b>Cc</b>	This field is only displayed if the recipients details is shown. Add one or multiple employees, or enter the cc recipients' email addresses.
<b>Bcc</b>	This field is only displayed if the recipients details is shown. Add one or multiple employees, or enter the bcc recipients' email addresses.
<b>Reply to</b>	This field is only displayed if the recipients details is shown.  By default, if the recipients reply to the message, the email address of the connected user will be used. If you want the reply to be sent to other recipients, add one or multiple employees or enter the recipients' email addresses.
<b>Object</b>	By default, the US title is filled in but the object can be modified if needed.
<b>Message</b>	Fill in the message's body.

**3** Click on **Send**.


↳ The message is sent to the recipients specified.

## 6.3.2 Managing linked documents

Documents can be added to a US from the US form:

- By clicking on the **Add document** frame.
- By dragging and dropping the document in the **Add document** frame.

The added documents can be viewed from the US form. To open a document, click on it to download it.

To remove a document from a US, click on  then on **Unlink**. The document is no longer linked to the US but the associated document record sheet is kept.




To delete a document, click on  then on **Delete**. The associated document record sheet is deleted.

## 6.3.3 Filling in the timesheet

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




- [Direct time entry \(p. 16\)](#) to enter time with just one click.
- [Detailed time entry \(p. 16\)](#) to open a window to enter time spent, already filled in with all the information from the US.

### Direct time entry

- 1 From the US form, fill in the time spent on the US in the **Timesheet** field. Click on  or  to add or remove 10 minutes.
- 2 Select the **Action code** from the drop-down list.
- 3 Click on **Add**.  
 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 and are retrieved from the template or the issue used to create the US.

### 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 US form, click on **Enter...**  
 The **Time input** window opens.
- 2 In the **Time input** window, fill in the following fields:
  - the **Date** to use for the time entry (current day by default);
  - the time spent on the US in the **Timesheet** field. Click on  or  to add or remove 10 minutes.

The other fields are filled in with the information retrieved from the template or the issue used to create the US, however the values can be changed if needed.



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 input** section.

The **Weekly timesheet** section displays an overview of the time spent by the user during the week of the US's **Date**. The time spent on the current US 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.

### 6.3.4 Displaying the detailed form

Click on the issue's number at the top of the US form to display the detailed form of the associated issue.

#### Reference


For more information, refer to [Description of the task form \(p. 21\)](#).

## 6.4 DELETING USER STORIES


A US cannot be deleted manually. To delete a US, delete or move all the cards included in the US. The US will be deleted automatically once the last card has been moved or deleted.

# 7 Managing cards

Cards represent development tasks and are grouped in user stories (US) inside a sprint. When cards are added to a US, they are created in the first column of the sprint template. During the sprint, each developer will move the cards forward, for example in the *Doing* column, then *To be validated* and then *Done*. A card is considered completed when it has reached the last column of the sprint template.

Cards are managed from the **Board** view. To access it, click on the  tab on the left of the Agile Factory's screen.

## 7.1 ADDING CARDS

- 1 From the desired sprint, find the relevant US then click on  in the corresponding column.
- 2 Fill in the following fields:

Field	Description
<b>Title</b>	Fill in the card's title.
<b>Comment</b>	Add a comment to describe the task at hand.
<b>Assigned to</b>	Fill in the first characters of the searched employee, then select that employee from the results list to assign him/her to the card.
<b>Assessment</b>	Enter a value to assess the workload of the card 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.

- 3 Click on:
  - **Save** to create the card.
  - **Save (and more)** to create the card and directly open a new form to add another card.

↳ The new card can be found in the relevant US and in the relevant column of the sprint.

## 7.2 MOVING CARDS

### 7.2.1 To another sprint stage

To process a card, it must go through all the different stages of the sprint template.

### Example

A new card is added to a US, in the first column *To do*.



A developer starts to work on a card and moves it to the *Doing* column. Once the work is done, the card is moved to the *To be validated* column.

Then, once the validation is done, the card is moved to the *Done* column.

To move a card inside a US, select a card then drag and drop it to the desired column. The connected user is automatically assigned when a card is moved.

## 7.2.2 To another sprint


It is also possible to move a card to another sprint, for example when a card has not been completed in a first sprint and must be transferred to a new one.

- 1 Click on  for the desired card then on **Move to another sprint**.
- 2 In the **Select sprint** window, select the desired **Sprint** from the drop-down list.
- 3 Click on **Validate**.  
 The card is moved to the selected sprint. The US that included this card in the original sprint is duplicated in the target sprint to contain the moved card.

## 7.3 DELETING CARDS

### Important

Deleting a card cannot be reversed.

Click on  for the desired card, then click on **Delete the card** and confirm the deletion.

## 8 Managing the backlog

The **Backlog** view enables you to access help desk issues and tasks from Agile Factory:

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

The **Backlog** view displays all the context needed so that developers can easily process their tasks (corrective, maintenance, and so on.) without having to open the Application Desktop.

To access the **Backlog** view, click on the  tab on the left of the Agile Factory's screen.

### 8.1 SEARCHING FOR AND FILTERING TASKS

To access tasks, click on the **Backlog** tab. This screen displays all the tasks of the connected user or of a specific work group.

#### 8.1.1 Searching for tasks

Two  search fields are available from the screen's header:

- The first field, at the top right, can be used to search for all the existing tasks in the database. Fill in the number of the associated issue to display the relevant tasks. For a multi-field search, use the \* character or add a space between the searched terms. This search does not take into account the other criteria or filters specified.
- The second field, above the tasks list, can be used to filter the tasks displayed on the screen. Fill in the first letters of the task's type or label, the issue number, the associated customer, and so on.

The tasks matching the search criteria are updated directly so it is easy to find the desired task.

From the screen's header, it is also possible to narrow down the tasks displayed to easily find the desired one:

Field	Description
<b>Assigned to</b>	Select your tasks or a work group from the drop-down list to only display the tasks linked to the selection. <ul style="list-style-type: none"><li>• <b>Me</b> - your tasks</li><li>• Other work groups - the tasks assigned to the selected work group</li></ul>
<b>Pending</b>	Displays the pending tasks.
<b>Completed &lt;=3 D</b>	Displays the tasks completed during the last 3 days.

Field	Description
<b>Completed &lt;=3 M</b>	Displays the tasks completed during the last 3 months.
<b>Sort by</b>	Select how the tasks are sorted from the drop-down list.

### 8.1.2 Filtering tasks

**1** From the **Backlog** tab, click on **Filters**.

↳ The **Filter results** window opens.



**2** In the window, check the relevant boxes for the filters that should be applied. You can combine as many filters as necessary.

**3** Click **Apply**.

↳ The tasks matching the specified filters are displayed. The other tasks are hidden. The filters applied are kept until they are modified or deleted.


To delete the filters applied, click on **Filters** then **Remove filters**.




## 8.2 DESCRIPTION OF THE TASK FORM

Click on a task from the list in the **Backlog** tab to display the task's detailed form. Click on  to expand the form and on  to collapse it.

A task form is made up of two parts:

- The first part shows the task's context with all the information from the associated issue: the issue's title and number, its description, the customer response, the internal and visible information, the linked documents. This information cannot be modified.
- The second part contains the fields that the user must fill in to process the task:

Field	Description
<b>Tags</b>	<p>Fill in the first characters of the searched tag, then select it from the results list to add it to the task. Click on  to remove a tag from a task.</p> <p>Tags are used to categorize tasks and are set up from the Application Desktop.</p>
<b>Task type</b>	<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>If needed, select another task type from the drop-down list.</p>
<b>Group</b>	<p>The task group enables to assign the task to a work group. The different work groups can be set up.</p> <p>If needed, select another work group from the drop-down list.</p>



Field	Description
<b>Assigned to</b>	<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"> <li>the employees that belong to the company associated with the issue;</li> <li>the employees who can be assigned tasks for issues of multiple companies.</li> </ul> <p>Click on  to assign the task to yourself, signifying that you are currently working on the task. If needed, click on  to free the task.</p>
<b>Visible information</b>	The task-related information to let the customer know about the issue's progress.
<b>Internal information</b>	The internal task-related information to give details about the actions carried out and how the issue is processed. This information can only be viewed internally.
<b>Custom data</b>	<p>The <b>Custom data</b> section is only displayed if custom data are associated with issues.</p> <p>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 in the Application Desktop, but some custom data can also be displayed in the task form in Agile Factory.</p> <div> <p><b>Reference</b></p> <p>The number of custom data to be displayed and the index of the first custom data are specified in the preferences. For more information, refer to <a href="#">Preferences (p. 9)</a>.</p> </div>
<b>Timesheet and Action code</b>	<p>Enables to input the time spent on the task.</p> <div> <p><b>Reference</b></p> <p>For more information, refer to <a href="#">Filling in the timesheet (p. 25)</a>.</p> </div>
<b>Corrective revision</b>	<p>The product's revision number that contains the fixes or evolutions.</p> <p>Click on  to fill in the last corrective revision available automatically.</p>
<b>Next task</b>	Before completing the task, select the next task's type from the drop-down list.
<b>Next group</b>	Before completing the task, select the next task's work group from the drop-down list.
<b>Next assigned employee</b>	Before completing the task, fill in the first characters of the searched employee and select it to assign it to the next task.

## 8.3 CREATING AN ISSUE FROM A TEMPLATE

A template is used to create similar simplified issues without having to fill in the same values multiple times. It is included in a template grouping that can be shared with specific employees or work groups.

### Note

If a template is crossed out, it means it is not detailed enough to be used in Agile Factory. To be able to use this template in Agile Factory, the owner must fill in the template's missing values in the Application Desktop.

- 1 From the **Backlog** tab, click on the creation button on the top right of the screen.  
 The **Select your template** window opens to display the different templates set up in the Application Desktop.
- 2 Select the desired template.
- 3 Fill in the issue by specifying a **Title** and a **Description** if needed.
- 4 Click on **Add**.  
 The issue is created and is added to the list of issues in the **Backlog**.

### Reference

For more information about simplified issues and templates, refer to the *Simplified issues General Guide*.

## 8.4 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.

- 1 From the **Backlog** tab, click on the desired task to display its details then click on .

### Note

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

- 2 Fill in the following fields:

Field	Description
<b>On hold start date</b>	Displays the date and time when the issue will be put on hold.
<b>Expected end</b>	Enter the date and time when you expect to resume the issue. This date is for informational

Field	Description
<b>date</b>	purposes only because the issue must be resumed manually.
<b>On hold reason</b>	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 in the Application Desktop and are used to explain why an issue is put on hold.
<b>Details (customer visible)</b>	Add any details to explain why the issue is put on hold. This comment can be viewed by the customer on the Customer Portal.
<b>Appointment</b>	Check this box to set an appointment with the customer to talk about why the issue is on hold. The date and time of the appointment are for informational purposes only but can be viewed by the customer on the Customer Portal.
<b>New status</b>	Displays the list of statuses available to put an issue on hold.
<b>New state</b>	Displays the list of states associated with the <b>New status</b> .

### 3 Click on **Put on hold**.

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 task's detailed form.

### 1 Click on .

### 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.

## 8.5 SENDING MESSAGES

From the task form, it is possible to send an email to the desired recipients in order to discuss about the task.

### 1 From the task form, click on .

### 2 Fill in the following fields:

Field	Description
<b>To</b>	Add one or multiple employees, or enter the recipients' email addresses.
<b>Cc</b>	This field is only displayed if the recipients details is shown.  Add one or multiple employees, or enter the cc recipients' email addresses.
<b>Bcc</b>	This field is only displayed if the recipients details is shown.  Add one or multiple employees, or enter the bcc recipients' email addresses.
<b>Reply to</b>	This field is only displayed if the recipients details is shown.  By default, if the recipients reply to the message, the email address of the connected user will be



Field	Description
	used. If you want the reply to be sent to other recipients, add one or multiple employees or enter the recipients' email addresses.
<b>Object</b>	By default, the US title is filled in but the object can be modified if needed.
<b>Message</b>	Fill in the message's body.

**3** Click on **Send**.



↳ The message is sent to the recipients specified.

## 8.6 FILLING IN THE TIMESHEET

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

- [Direct time entry \(p. 25\)](#) to enter time with just one click.
- [Detailed time entry \(p. 25\)](#) to open a window to enter time spent, already filled in with all the information from the issue.

### Direct time entry

**1** From the task form, fill in the time spent on the task in the **Timesheet** field. Click on  or  to add or remove 10 minutes.

**2** Select the **Action code** from the drop-down list.

**3** Click on **Add**.

↳ 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.



### 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 task form, click on **Enter....**

↳ The **Time input** window opens.

**2** In the **Time input** window, fill in the following fields:

- the **Date** to use for the time entry (current day by default);
- the time spent on the task in the **Timesheet** field. Click on  or  to add or remove 10 minutes.

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

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 input** section.

The **Weekly timesheet** 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.

## 8.7 COMPLETING TASKS

Completing a task means its purpose has been carried out and the issue can be moved forward.

### Note

Completed tasks can still be modified.

Before completing a task:

- Fill in the **Next task** field otherwise you will not be able to complete the task.
- Enter the time spent on the task. 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.

To complete a task, click on **Complete** from the task form then confirm the completion. The task is marked as completed and a new task is created with the type specified for the next task.