

# Using the Issue Tracker (Legacy)

The Issue Tracker is a dynamic knowledge base that is evolving over time. As a CollegeSource client, you help create the knowledge base as you enter issues for the CollegeSource team to address.

The Issue Tracker collects support issues, bugs, and enhancement requests for all of CollegeSource's products in one database.

**When using this help guide, click the screenshot thumbnail for a closer look.**

All users can:

- Search previously entered issues, bugs, and enhancements
- Create issues for the CollegeSource staff to offer solutions
- Upload and attach files to your issue - screen shots, dumps, etc.
- Watch issues reported by other users and follow all responses
- Track your reported and watched issues on the customizable Issue Tracker dashboard

When you enter an issue:

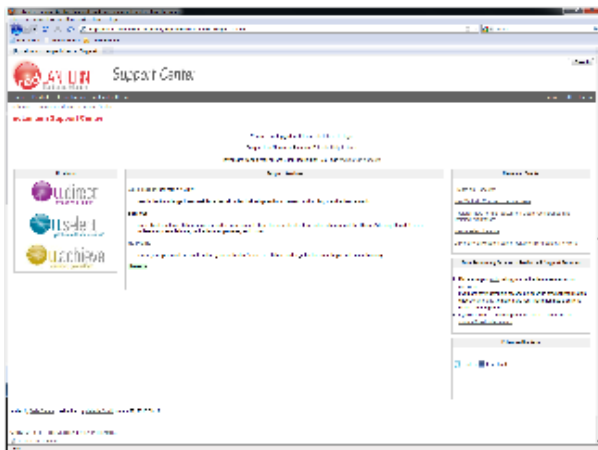
- An issue number is automatically generated
- The CollegeSource staff is notified
- You should receive a confirmation e-mail from the Issue Tracker
- You will receive an email from the Issue Tracker at each issue update
- including a link to the issue
- You have the option of requesting that your issue remain private (viewable to only you and the CollegeSource staff)

Issues can be seen by everyone with access to the Issue Tracker. Once the issue is reported, the question, comments and eventual response become part of the searchable database **unless restricted as private**.

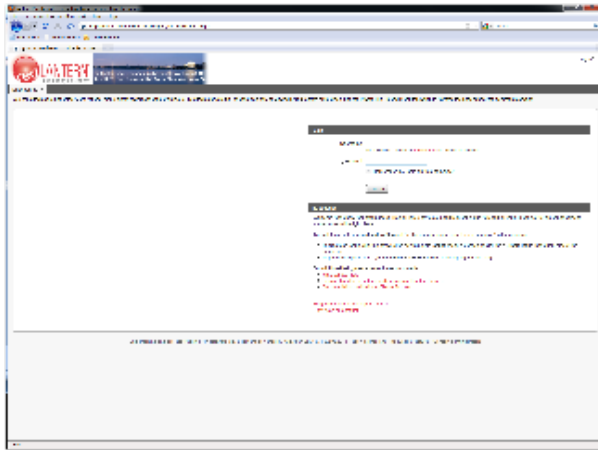
The Issue Tracker does not replace the primary communication tool between users; the CollegeSource forums (formerly listservs). Forums (provided through CollegeSource) contain the knowledge and perspectives of hundreds of other users of our products. They include a wealth of information about installation of, encoding for, and strategies in using our products. Generally, CollegeSource staff do not reply to the forums as the intent is for user discussion and sharing.

## Logging in to the Issue Tracker

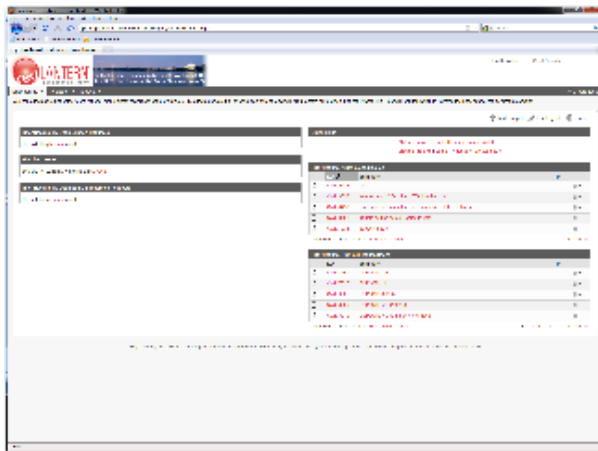
The link to access the Issue Tracker is on the CollegeSource Support Center page, under Clients (<http://clients.collegesource.com/home/display/SUP/CollegeSource+Support+Center>).



You will need to log in to gain access to the Issue Tracker. When prompted, the login ID and password will be what you use to log into the Support Center.

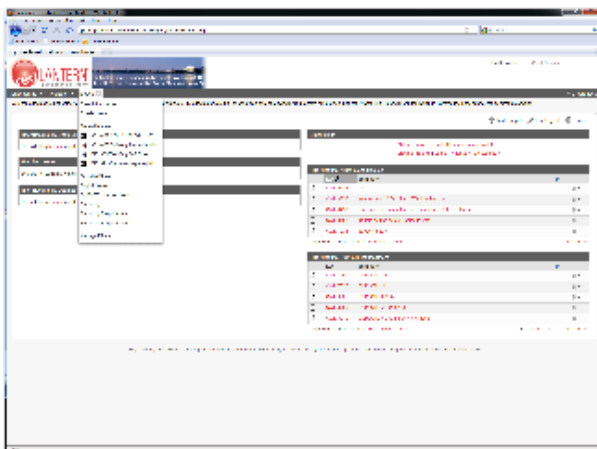


After logging in, your *dashboard* will be displayed. The dashboard represents your home page for the Support, Bug & Enhancement Tracker.



## Creating a new issue

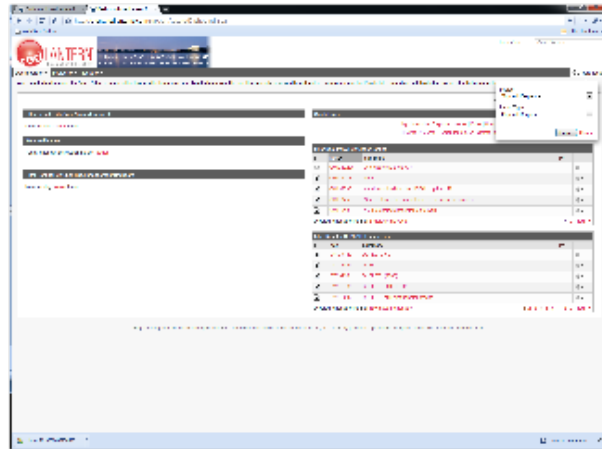
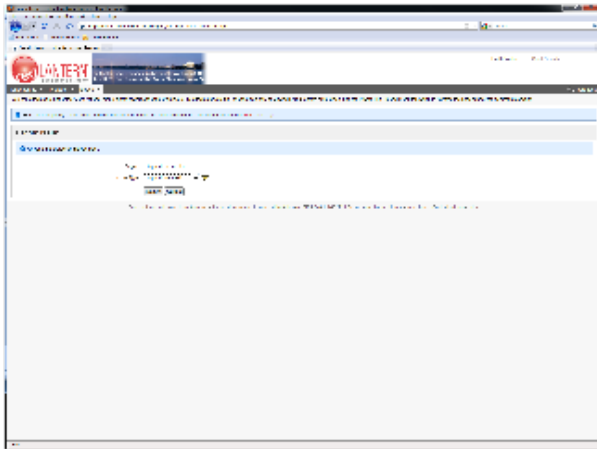
From your dashboard, use the dropdown menu for **Issues** from the links at the top of the page and select **Create Issue** or click the '+Create Issue' button on the right side of the header bar:




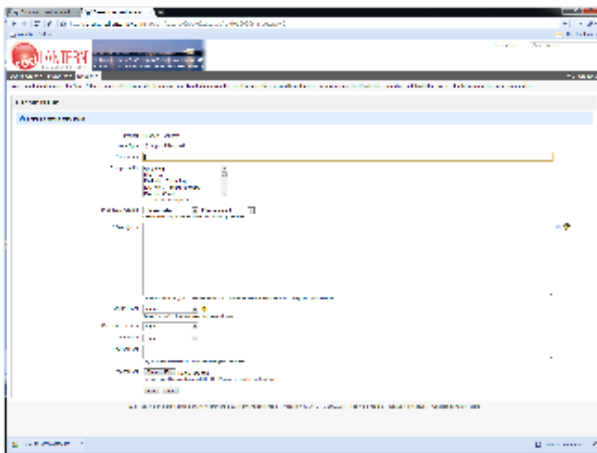
The following page will then allow selection of the issue type.

On this page, two selections are made: **Project** (only one option) and **Issue Type**.

The options for Issue Type are Support Request, Bug, and Enhancement - we prefer that you start with **Support Request** and let CollegeSource staff determine if a bug or enhancement issue is needed.



Note: Throughout there is additional help available by clicking on the  link.



**Project** (pre-filled from previous page)

**Issue Type** (pre-filled from previous page)

**Summary**-Represents the subject of the issue and should provide a short description.

**Components**- Represents the category of the topic.

**Product & Version**-The pair of fields allows information to be entered regarding product and version. Selection of the product dictates the choices in the Version 'picklist'. Version information is very useful, although not required.

**Description**- The area in which the actual issue is described. Please be specific and include as much information as possible. Indicate the desired outcome and encoding you have already tried.

**Security Level**- Selecting **Private** will only allow the Reporter specified on the issue and CollegeSource staff to see the information. Watchers cannot access a private issue.

**Operating System**- Specification of the server platform used.

**Database** - Specification of the type of database used.

**Environment** - Additional information about your institution's operating environment.

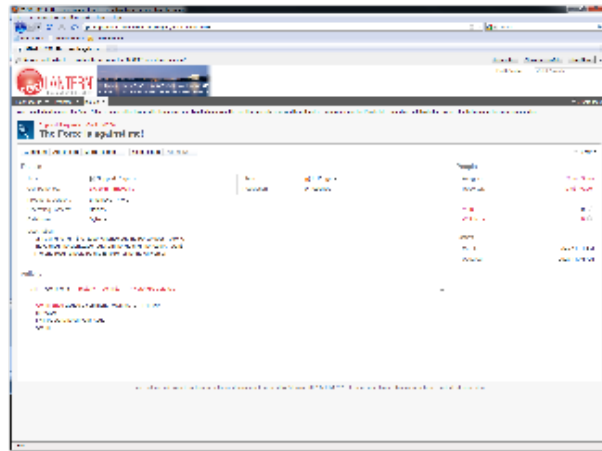
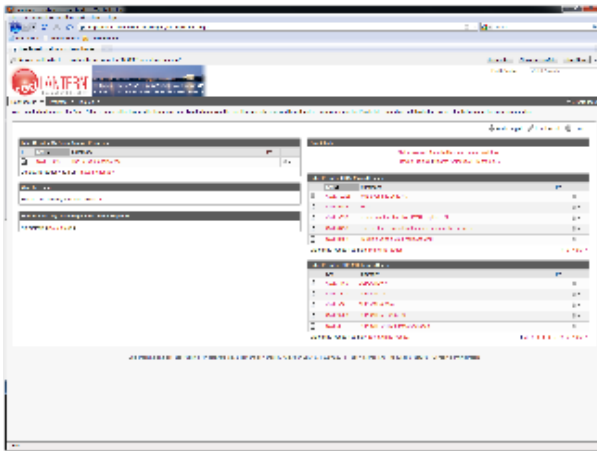
**Attachment** -This is used to attach a document to the issue. All attachments made on the Create Issue page are **public**. If you are attaching something that may contain student information (such as a dump file), you may want to use the Manage Private File option once the Issue has been created.

Note: There are only two required fields: Summary and Description.

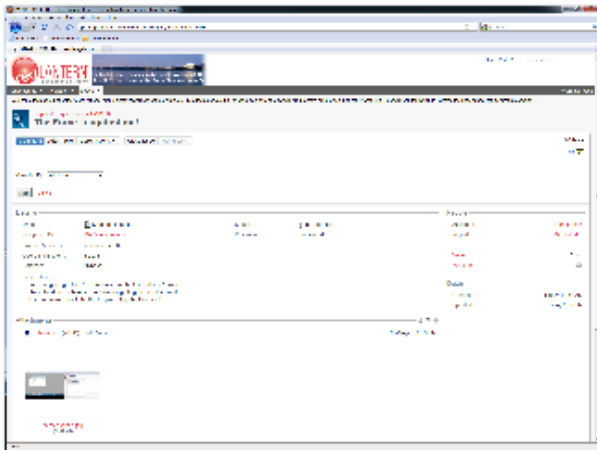
## Managing an Issue

Log in to the Issue Tracker and go to the **My Open Support Requests** area on your dashboard.

Find your issue and click the issue number (circled below).



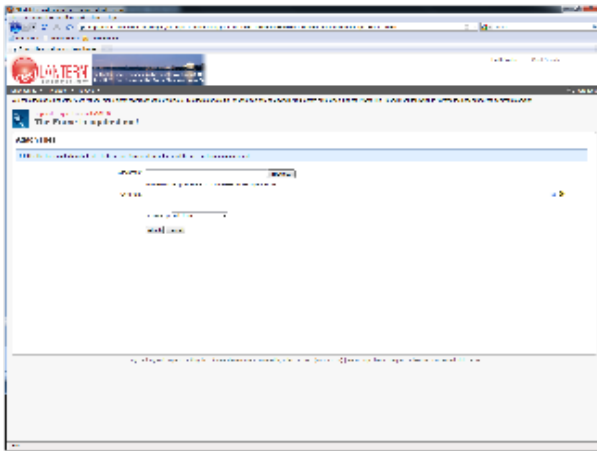
The new window above opens. The buttons at the top (Action Area) allow you to Add Comments, Attach Files, Close the issue, and more. When the CollegeSource staff member assigned to your issue posts a comment, you will receive an e-mail notification. **DO NOT** reply to the e-mail. Click on the link in the e-mail to be taken to the Issue in the Issue Tracker. To post a comment, select the Comment Tab in the Action Area. **Type your comment here and click on the Add button below.**



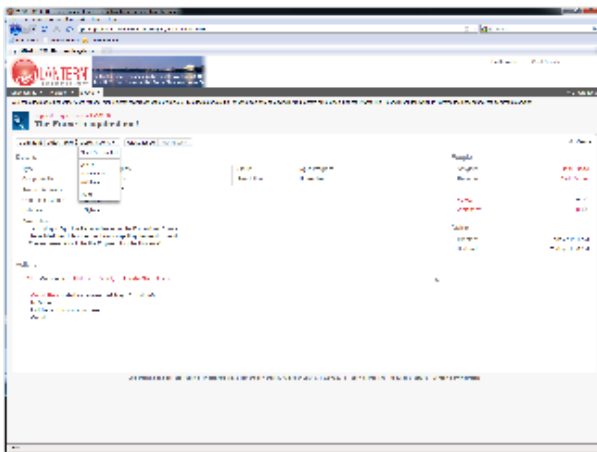
The Comment box will stay on top and you can scroll through the Issue without losing the comment box. Comments, status history, and the option to upload private files are available in the Activity. A Private File is only viewable by the Reporter and CollegeSource staff. If any confidential information (e.g., student name, address, id) appears in a screenshot, dump, or other document, the Private File Upload should be used. Click on the tabs to view other information, such as the Change History, any Activity and History.



To attach a file, click on the Attach File button in the Action Area.



Browse for your file and click the Attach Button.

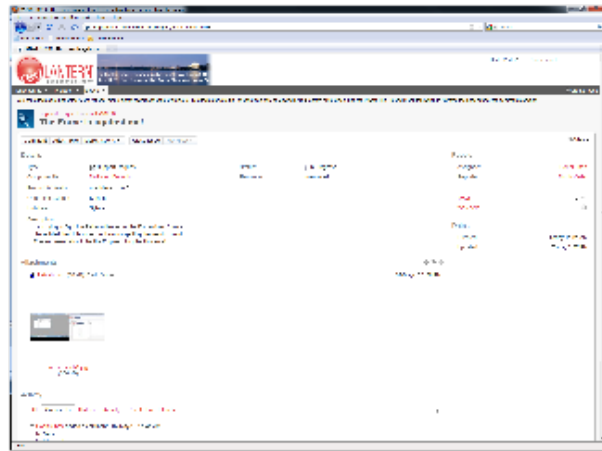
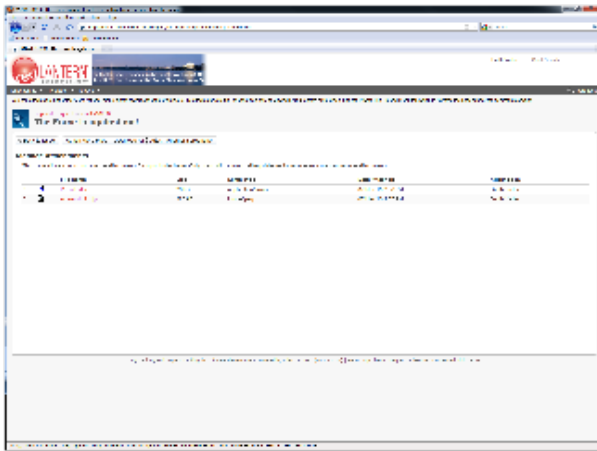


Attaching a Screenshot is in the dropdown menu of More Actions. Selecting this action will open the window on the next page.



## Managing Attachments

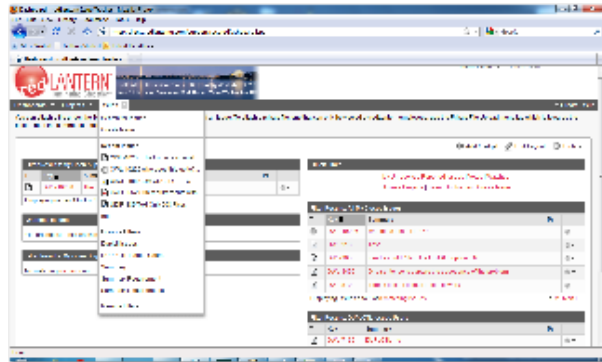
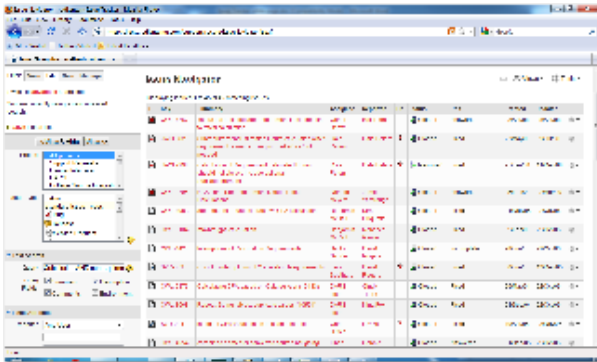
To access all of the attachments on an issue, click on the eye icon in the Attachments area.



Here you can add more files and screenshots. A file can only be removed by request of the CollegeSource staff member assigned to your issue.

## Other Activities in the Issue Tracker

**Search the Issues** - There are over 10,000 issues logged in the Issue Tracker. Users can search those issues to see if anyone else experienced the same issue. The Search option is on the Issue dropdown menu or use the Quick Search at the top right corner. The most recent issues you have viewed and Filters you have used (previous searches) are also in this dropdown menu.



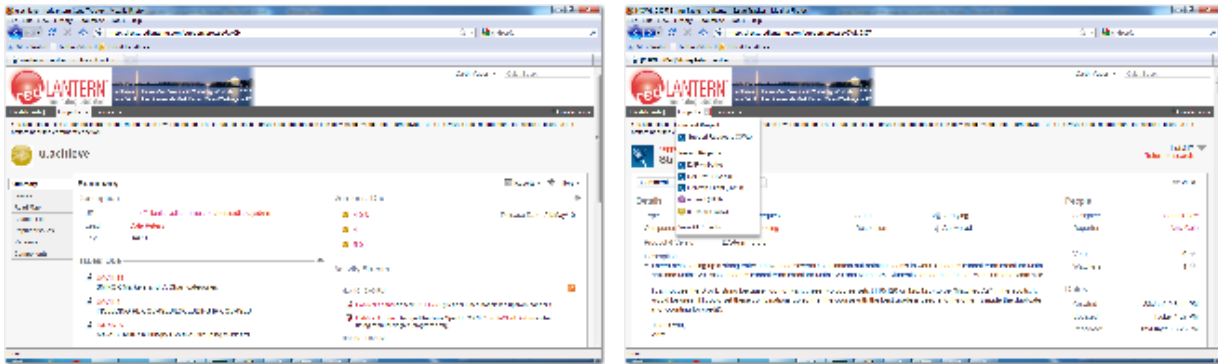
Enter key words and Boolean connectors to refine your search. Make sure that you check the Comments box to search all the Comments on an issue that may contain your keywords. You can also search for a specific Reporter or Assignee. When you have set all your parameters, click View. For this search, 45 issues were returned. If you want to save the search, check the Save it as a filter box highlighted above.

**Watch an Issue** - You may watch an issue reported by someone else, and even add a comment or attach a file to the issue. This is handy if your co-worker reported an issue that also requires your input. As a Watcher, you will receive all communications via e-mail just like the reporter.

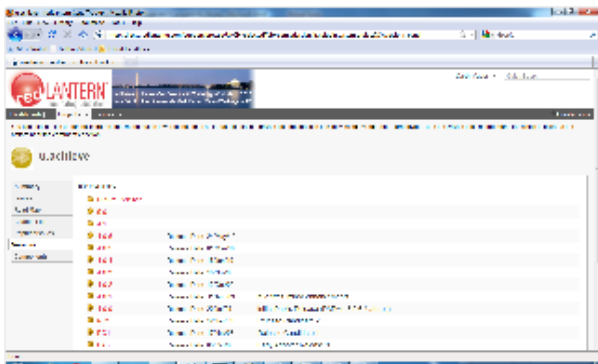
*Note: Being a Watcher on an issue you reported is not necessary.*



**Browsing Projects** - gives you access to the most recent reported bugs and enhancement requests. You can search by product (e.g., u.achieve) and by release version.



Summary shows all current issues attached to unreleased future versions. To see issues for older versions, select Versions in the tabbed menu on the left side of the screen.



**Logging off** - use the dropdown menu beside your user name at the top right corner of the page.

