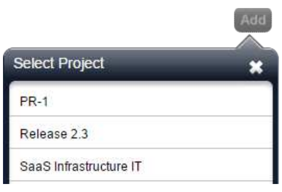
Issues

This option is used to create, assign, escalate and manage issues. It is to be noted that before creating an Issue, a [Project]() needs to be created as Issues are part of a Project.

Creating an Issue



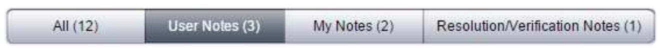
- To create a new Issue, click on *Add*. The *Select Project* window appears. Select the Project for which the Issue is being created.
- Provide a title.
- Add a description.

- Set *Type*: Issue, Defect, Task, Discussion or Query. The available options are system defined. The user can add more customized options using the *Picklist Customization* feature.

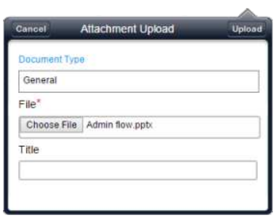
- Set *Status*: Open, On-Hold, Resolved, Verified, Verification Failed or Closed.
- Set *Priority*: Low, Normal or High.
- Set Severity: Low, Medium or High.
- Click on *Assigned To* to select the name of the person to whom the Issue is to be assigned.
- Click on *Due Date* to select the due date for the Issue.
- Click on *User Tag* to select the user-defined tags for marking the Issues for future follow up. User Tags are a means of marking issues with the user's own keywords or tags. The user can create multiple tags and assign any number of them to an Issue. The user can search for tags or filter issues by tags.
- Click on *Customer* to select the customer for whom the Issue is being defined.
- Click *Save* to save the record. As soon as a record is saved, a notification is sent to all configured users via email. Upon saving, the Notes, Attachments, Notifications and Linked Issues tabs get activated.

Maintaining Notes

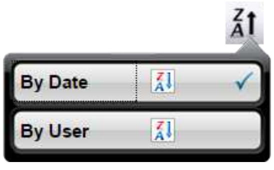
- Switch to the *Notes* tab to add notes related to the Issue.
- Click on *Add Notes* to add new notes.
- Click on *Sort* to sort notes by date or user.
- Multiple tabs are available to view: notes added by users, notes specific to the logged-in user and notes for resolution or verification.



Adding Attachments



- Switch to the Attachments tab.
- Click on *Add Attachments* to add attachments. Then click on *Choose File* to browse the location of the file to be attached. Enter a name of the file at the Title field.
- Click on *Upload* to upload the attachment.



- Attachments can be sorted by the fields available in the sorting menu.

Sending Notifications

- Switch to the Notifications tab.
- Click on *Recipient* to select the users who are to be notified when a particular event occurs.
- Click on *Notify Now* to send notifications immediately to the desired users. A notification screen is displayed where the user can enter the email address of the concerned user. The user specified here can be a pseudo user, application user or any other external user.

Linking Issues

- Switch to the *Linked Issues* Tab.
- Click on the Plus **+** sign.
- On the new window that appears, Click Link Type and select an appropriate title.
- Select the issue to be linked by clicking on the search button.
- Enter a note if required.
- Click on Link to establish the link.

Left Panel

- Left panel displays a list of all the Issues arranged under the Project name(s).
- Enter a string in the text box to search for an issue.

- Click the down-arrow Recent to view the last 10 searches made.

Right Panel

- Shows the list of last 10 Issues visited by the logged in user.
- Delete the Issue active on the screen.
- Creates a Clone of the item being viewed. Clone
- Enables the user to add notes to the Issue.