Issue Tracking

User Guide

Contents

Issue Tracking

Target Audience

- Teachers
- Administration Staff

Content

Within this course staff will learn how to:

- Navigate to Issue Tracking
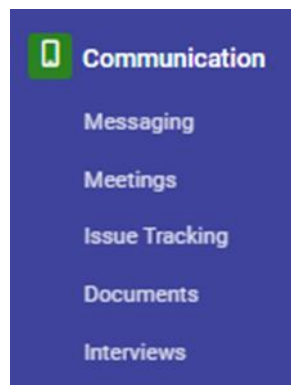- Create an Issue/Task
- Edit Tasks
- Closing Tasks
- Reports

Overview

The following procedures is to teach staff how to navigate to Issue Tracking module.

Navigating to Issue Tracking

The following procedure is to show users how to navigate to the Issue Tracking Module.

1. Select Issue **Tracking under** the **Communication** group.

The **Issue Tracking** Home screen displays.

From this screen you can add issues to be tracked, view My assigned and Open Tasks and Task Statistics.

Task Statistics

Task Statistics give you an overview of the number of tasks you have allocated to you, including overdue tasks. Green represent the total number of tasks. Red represents overdue tasks. To view any of the tasks listed, click on the hyperlinked number.

1. The page displays a summary of the tasks and you can toggle between the Open, Closed, All and Overdue tabs.
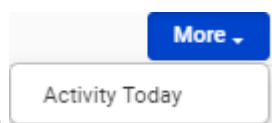
2. Click on More [More] [Activity Today] to view activity today.

3. You can Print a list of your task or do a more refined search.

4. You can Close off a task or click a task to view more detail.

Creating an Issue/Task

Issue Tracker enables staff to create task or issues to be fixed around the school. These issues can be repairs, Work, health and safety, executive specific, incidents even catering for school events.

Go to Add Task and select the Category.
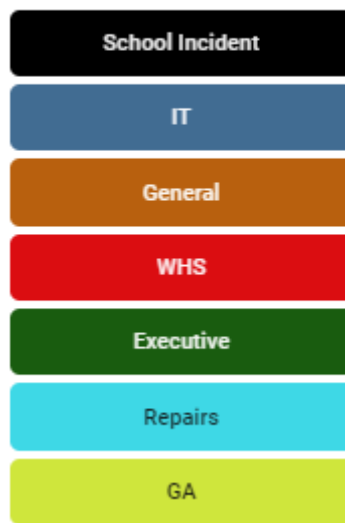
The detail within each category may vary

Details	General	WHS	IT	Executive	school incident
Issue Summary	X	X	X	X	X
Reported By	X	X	X	X	X
Location	X	X	X	X	X
Priority	X	X	X	X	X
Item/Machine no	X	X	X		
Serial no	X	X	X		
Deadline	X	X	X	X	
Assigned To	X	X	X	X	X
Additional Information	X	X	X	X	X

Attachment	X	X	X	X	X
Student		X			
What is the risk		X			
Who is at risk		X			
What action was taken		X			
The problem has been referred to		X			
type of problem		X			
Corrective Action		X			
Short Term action		X			
Long Term Action		X			
Review Date		X			
Are the review controls effective?		X			
Issue					X
Date of Incident					X
Description of Incident					X
Cause of Incident					X
Was the school fully evacuated?					X
Was the school partially evacuated?					X
Was the school partially or fully locked down?					X
Was any plant being used at the time? (Include what it was in additional information)					X
This incident has been classified as a Critical Incident:					X
Injured Person					X

PCBU Details (Person Conducting a Business or Undertaking)					X

Select **WHS** button from the options on the right-hand side of the screen.

The following screen will display.

Complete online details and **Save**.

The task will appear in either My Assigned or my Open Tasks.

A notification can be sent to those who opened or were assigned task. Depending on the setting, Issue tracking notification can also be sent when the tasks changes, a comment is added, or it is closed.
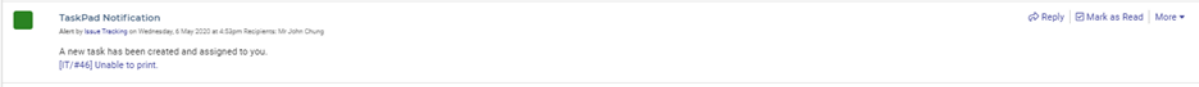
There is also a dashboard widget for Tasks that display those created by the Users and those assigned to User.

My Tasks

Tasks I Created
Unable to print.
Telephone Malfunction
!!! HELP !!!
Sinkhole in classroom
Found Iphone 5s
Computer will not turn on
Issue tracking test
test 1
Joe Bloggs 18/11/2019
Test Upload
Test upload of doc
Broken Leg
Tasks Assigned To Me
Unable to print.
Spilt water near toilets
Telephone Malfunction
issue with smart board

Editing Tasks

Staff can click on any hyperlink to review/edit a task.

The arrow colours next to each task indicate its Priority

○ Lowest ○ Low ○ Normal ○ High ● Highest

1. Staff can perform various actions

Edit   Close Task   Print   Delete Task

Task Details

Task Reported:
Tue, 18 Feb 2020 12:53 PM
by John Chung
(7 months ago)

Last Activity: 7 months ago

2. Staff can Attach files and view task Details

3. A comment can now be added as opposed to additional information.

4. Staff can run searches

5. Staff can perform Bulk Task changes.

6. Tick all the Tasks to be altered, and select one of the following

Closing Tasks

The following procedure is to show users how to close a task once it is completed.

When a task is completed, it can be closed by either the staff member who created it or the staff member who completed the issue.

1. Navigate to the incident you created, either through **My Tasks** or by selecting **Tasks** from the left-hand side of screen**.**

2. Click on the **Task** you wish to close by clicking on the name or close in Bulk.

Reports

Staff can run searches based on selected criteria and Print.

Glossary of Terms

Item	Description	Type
Title	Title of Issue tracking	text
Visibility	who can see the task	radio button

Show Deadline	Is there a deadline for this task	Yes/No
Can Attach a Student	Do we need to attach a student to a task	Yes/No
Can non- managers set an Assignee	Can all staff set assignees	Yes/No
Default Assignee	default assignee	yes/No
Require Assignee	Do we need to assign task	list selection
Edit Access	Access Levels for tasks	radio button
Notification Type	how do you want staff to be notified	list selection
When a task is assigned	Notification settings	Enabled/Disabled
When a task changes	Notification settings	Enabled/Disabled
When a comment is added	Notification settings	Enabled/Disabled
When a task is closed	Notification settings	Enabled/Disabled
Location Group/Building	Add locations for tasks	text
Assignee Name/Title	can be group or individual	list selection
Issue Summary	Name of Issue	text
Reports By	who is reporting issues	list selection
Location	where did it occur	list selection
Priority	Priority of the task	radio button
Item/Machine No	Only if related to IT	text
Serial No	Only if related to IT	text
Deadline	the deadline for this task	calendar entry
Student	was a student involved	list selection
Assigned To	who will fix the task	list selection
Type of Problem	level of the task issue	radio button