



## Issue Tracking

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## Issue Module Rights

Issues Module Rights	Owner	Administrator	Power Collaborator	Collaborator	Restricted Collaborator	Reviewer	Viewer
Create an issue	✓	✓	✓	✓	✓	✓	✓
Assign an issue to one or more users	✓	✓	✓	✓	✓	✗	✗
See issues assigned to you	✓	✓	✓	✓	✓	✓	✓
See issues created by restricted collaborators and up (if not assigned)	✓	✓	✓	✓	✗	✗	✗
Delete own issue	✓	✓	✓	✓	✓	✓	✓
Delete any issue	✓	✓	✓	✗	✗	✗	✗
Add comments and photos to any issue	✓	✓	✓	✓	✓	✗	✗
Export and generate issues report (CSV and Word)	✓	✓	✓	✓	✓	✓	✓
Close issue at all times when user is creator of the issue	✓	✓	✓	✓	✓	✓	✓
Close issue at all times when user is NOT creator of the issue	✓	✓	✓	✗	✗	✗	✗
Pull Back issue when possible in the process when user is NOT creator fo the issue	✓	✓	✓	✗	✗	✗	✗

## How to assign an issue

1. During the creation or after the creation of an issue, click on the **Assigned to** field

Cancel
Issue Details
Create

T

Test

>

List

Punch List

>

Location

1

>

Test

⊗

Photos

0 photo

>

Assigned to

Unassigned

>

Priority

Normal

>

Due date

Saturday, December 19, 2020 10:11 AM

>

Comments

0 comment

>

Cost Impact

\$700.00

>

Schedule Impact

7 days

>

Document

M205

>

2. Choose the assignees from the list, once selected a green checkmark will appear beside their name

Select Assignees

🔍

Show assignees only

Jeff Drouin

✓

Sabrina Beffert

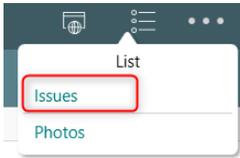
✓

Test Account

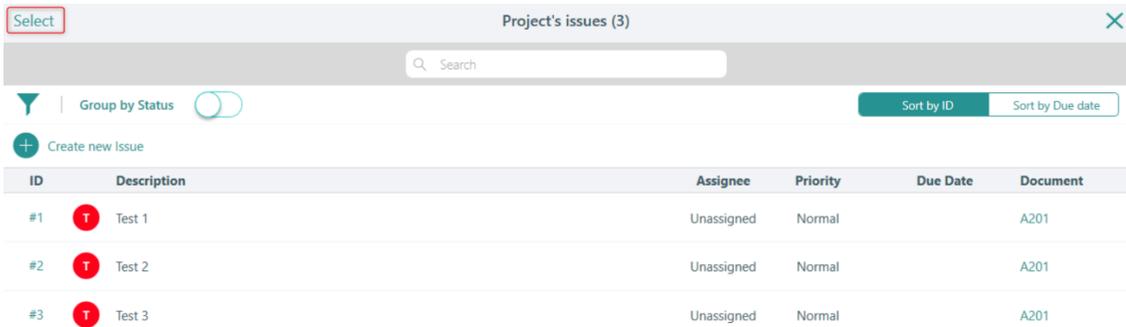
3. Click on **OK** to save the changes

# How to bulk assign issues

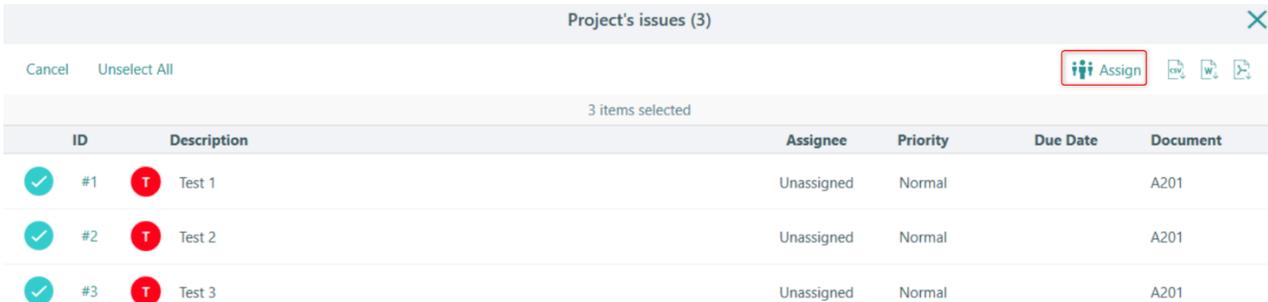
1. At the project or plan level, access the issue list



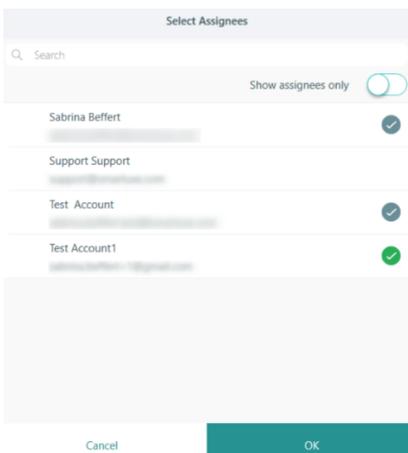
2. Click on **Select**



3. Select the issues you would like to assign users to and click **Assign**

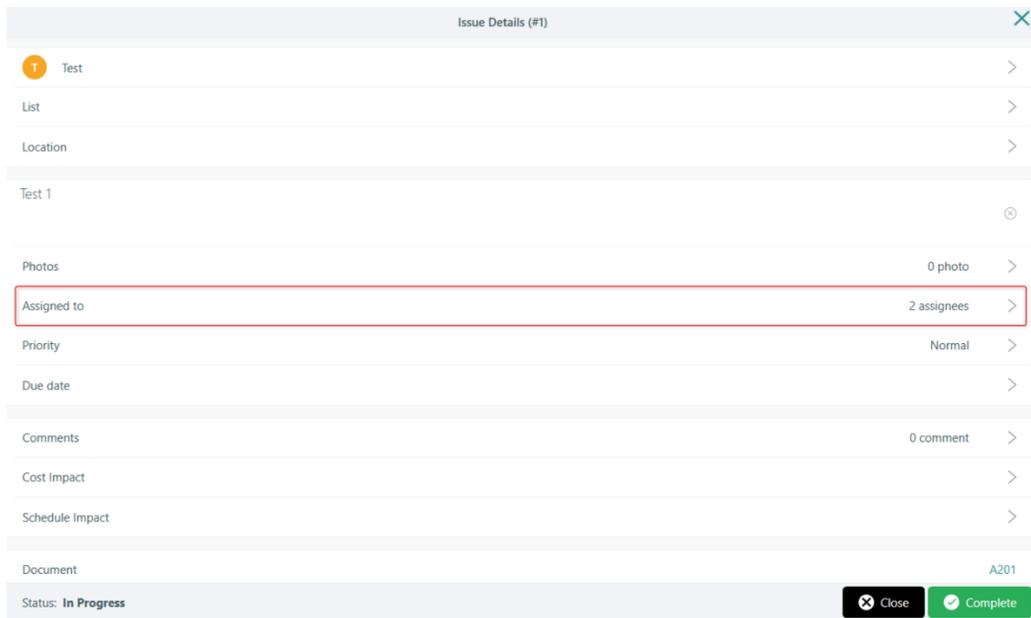


4. A list of assignees will then open, a grey check beside the user's name indicates that this user has already been assigned to the selected issues. To select a user, click beside their name and a green checkmark will appear. Click **OK** once done to save the changes.

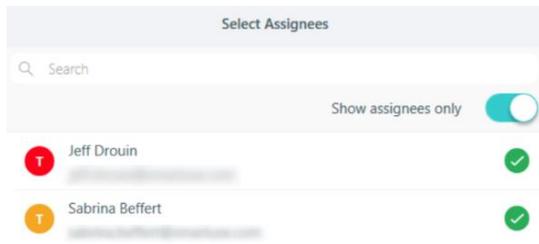


## How to view the status of each assignee

### 1. Click on the **Assigned to** field



### 2. Click to filter by assignees only to view the status of the issue for each assignee. View the matrix below or [here](#) for multiple assignee statuses



## Issue statuses for multiple assignees

Status of issues with multiple assignees			Status of the issue as owner/admin	Status of issue as assignee
Assignee 1	Assignee 2	Assignee 3		
Open	Open	Open	Open	Open
Open	Open	In Progress	In Progress	Open or In Progress
Open	In Progress	In Progress	In Progress	Open or In Progress
In Progress	In Progress	In Progress	In Progress	In Progress
Open	Open	Completed - pending validation	In Progress	Open or Completed- pending validation
Open	In Progress	Completed - pending validation	In Progress	Open, In Progress or Completed- pending validation
In Progress	In Progress	Completed- pending validation	In Progress	In Progress or Completed- pending validation
In Progress	Completed- pending validation	Completed- pending validation	In Progress	In Progress or Completed- pending validation
Completed- pending validation	Completed- pending validation	Completed- pending validation	Completed- pending validation	Completed- pending validation

## Flow of issue tracking statuses

When an issue is created but not assigned, you will have the option to close it as **Owner, Administrator or Power Collaborator**

- **Close** the issue



When the issue **is assigned to you**, you will have the following options as an **Owner, Administrator or Power Collaborator**

- **Accept** the issue to change the status to in progress



- **Close** the issue



**Collaborators, Restricted Collaborators and Reviewers** only have the following options when an issue is assigned to them:

- **Accept** the issue to change the status to in progress



- **Decline** the issue to unassign themselves and put the issue back to open



When an issue is ready to be completed you have the following options:

- **Complete** the issue when all necessary work has been completed



When the issue is Completed, pending validation all users have the option to **Retract**

- **Retract** if the issue was completed by mistake or needs to be redone



Only the **Owner, Administrator or Power Collaborator** have the option to **Close** the issue once it has been validated or **reopen** (put the status from **completed, pending validation** to **open**) if necessary



If an issue was closed by mistake, you also have the option to **reopen** it to put it back to the status **open**



## Owner, Admin and Power Collaborator (Not assigned)

These three roles can create and modify issues at any stage during the process. Once the issue is created you will have the option to **Close**.



The screenshot shows the 'Issue Details (#3)' page for an issue titled 'Test'. The page features a list of fields with right-pointing chevrons for navigation. The fields and their values are: 'Test' (with a red 'T' icon), 'List', 'Location', 'Test 3', 'Photos' (0 photo), 'Assigned to' (Unassigned), 'Priority' (Normal), 'Due date', 'Comments' (0 comment), 'Cost Impact', 'Schedule Impact', and 'Document' (A201). At the bottom, the status is 'Open' and there is a 'Close' button.

## Collaborator, Restricted Collaborator, Reviewer (Not Assigned)

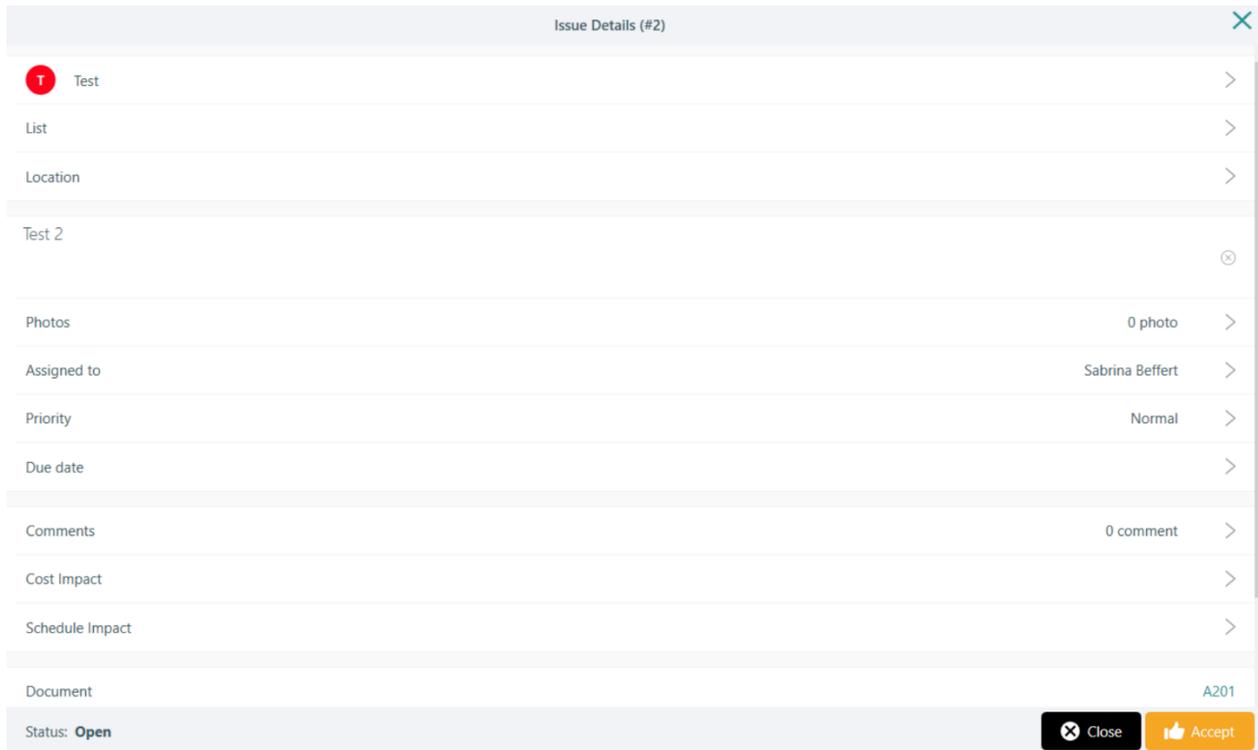
When an issue is created but not assigned **collaborators** can see the issue but cannot modify it. **Reviewers and restricted collaborators** cannot see the issue unless it is assigned to them.



The screenshot shows the 'Issue Details (#95)' page for an issue titled 'Construction'. The page features a list of fields with right-pointing chevrons for navigation. The fields and their values are: 'Construction' (with a red 'C' icon), 'List', 'Location', 'xaa', 'Photos' (0 photo), 'Assigned to' (2 assignees), 'Priority' (Normal), 'Due date', 'Comments' (0 comment), 'Cost Impact', 'Schedule Impact', and 'Document' (S2-2). At the bottom, the status is 'Open'.

## Owner, Admin, Power Collaborator (Assigned)

Once an issue is created, the assignee has the option to accept the issue to put it in progress or to close it. To refuse the issue, these roles can remove themselves directly in the list of assignees.



The screenshot shows the 'Issue Details (#2)' page. At the top, there is a close button (X). Below the title, there is a red circle with a white 'T' icon and the text 'Test'. The page contains several sections: 'List', 'Location', 'Test 2' (with a close icon), 'Photos' (0 photo), 'Assigned to' (Sabrina Beffert), 'Priority' (Normal), 'Due date', 'Comments' (0 comment), 'Cost Impact', and 'Schedule Impact'. At the bottom, there is a 'Document' section with the ID 'A201'. The status is 'Open', and there are two buttons: 'Close' (with an X icon) and 'Accept' (with a thumbs up icon).

Once accepted, the assignee does the required work until the issue is ready to be completed.



The screenshot shows the 'Issue Details (#2)' page. At the top, there is a close button (X). Below the title, there is an orange circle with a white 'T' icon and the text 'Test'. The page contains several sections: 'List', 'Location', 'Test 2' (with a close icon), 'Photos' (0 photo), 'Assigned to' (Sabrina Beffert), 'Priority' (Normal), 'Due date', 'Comments' (0 comment), 'Cost Impact', and 'Schedule Impact'. At the bottom, there is a 'Document' section with the ID 'A201'. The status is 'In Progress', and there are two buttons: 'Close' (with an X icon) and 'Complete' (with a checkmark icon).

Once completed, **the owner, administrator or power collaborator** can close the issue themselves. If the issue was completed by mistake or needs to be redone, they can use the **Retract** button to put it back to in progress.

The screenshot shows a mobile application interface for an issue titled "Issue Details (#2)". The issue is assigned to "Test" (indicated by a green circle with 'T'). The status is "Completed, pending validation". The interface includes several sections: "List", "Location", "Test 2" (with a close icon), "Photos" (0 photo), "Assigned to" (Sabrina Beffert), "Priority" (Normal), "Due date", "Comments" (0 comment), "Cost Impact", and "Schedule Impact". At the bottom, there is a "Document" section with the ID "A201". The status bar at the bottom left shows "Status: Completed, pending validation". On the right side of the status bar, there are two buttons: a yellow "Retract" button with a red 'X' icon and a black "Close" button with a white thumbs-up icon.

Once the issue has been closed, it can be reopened if needed which will put it back to **Open**

The screenshot shows the same mobile application interface for the issue "Issue Details (#2)". The issue is now assigned to "Test" (indicated by a black circle with 'T'). The status is "Closed". The interface includes the same sections as the previous screenshot: "List", "Location", "Test 2", "Photos" (0 photo), "Assigned to" (Sabrina Beffert), "Priority" (Normal), "Due date", "Comments" (1 comment), "Cost Impact", and "Schedule Impact". At the bottom, there is a "Document" section with the ID "A201". The status bar at the bottom left shows "Status: Closed". On the right side of the status bar, there is a red "Reopen" button with a white circular arrow icon.

## Collaborator, Restricted Collaborator, Reviewer (Assigned)

Once an issue is assigned, the assignee will have the option to accept the issue to put it in progress or decline it. Declining an issue always requires a reason for these roles.

Issue Details (#129) ✕

**T** Test

List 👉

Location 👉

test

Photos 2 photos 👉

Assigned to 👉

Priority Normal

Due date Friday, October 30, 2020 10:18 PM

Comments 0 comment 👉

Cost Impact \$678.00 👉

Schedule Impact 8 days 👉

Document A201

Status: **Open** 🚫 Decline 👍 Accept

Once accepted, the assignee does the required work until the issue is ready to be completed.

Issue Details (#129) ✕

**T** Test

List 👉

Location 👉

test

Photos 2 photos 👉

Assigned to 👉

Priority Normal

Due date Friday, October 30, 2020 10:18 PM

Comments 0 comment 👉

Cost Impact \$678.00 👉

Schedule Impact 8 days 👉

Document A201

Status: **In Progress** 🚫 Decline ✅ Complete

Once completed, **the owner, administrator or power collaborator** needs to approve the issue before it can be closed. The status will therefore be **completed, pending validation**.

The screenshot shows a mobile application interface for an issue titled "Issue Details (#129)". At the top, there is a header with the title and a close button. Below the header, the issue is identified as "Test" with a green 'T' icon. The main content area lists various details: "List", "Location", "test", "Photos" (2 photos), "Assigned to", "Priority" (Normal), "Due date" (Friday, October 30, 2020 10:18 PM), "Comments" (1 comment), "Cost Impact" (\$678.00), and "Schedule Impact" (8 days). At the bottom, there is a "Document" section with the ID "A201". A status bar at the very bottom indicates "Status: Completed, pending validation" and features an orange "Retract" button with a white 'X' icon.

If the issue was completed by mistake or needs to be redone, the **Retract** button can be used to put it back to in progress.

This screenshot is identical to the one above, showing the same issue details for "Issue Details (#129)". The status is "Completed, pending validation" and the "Retract" button is visible. The layout and content are consistent with the previous image, including the header, issue title, details list, and status bar.