Crowd Passion User Documentation

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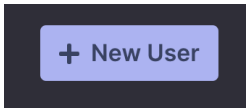
Version 0.01 - Draft

Basic Concepts

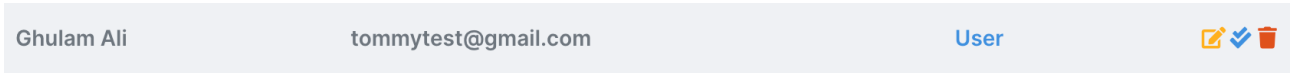
Users

The first user to register for an organisation will become the administrator for that organisation. They will then be able to add further users to their company. They can nominate other users to become admins alongside themselves. They also have the ability to remove users.

To add a new user simply click the ‘New User’ button:



Once a user has been created you can edit their access rights as follows:

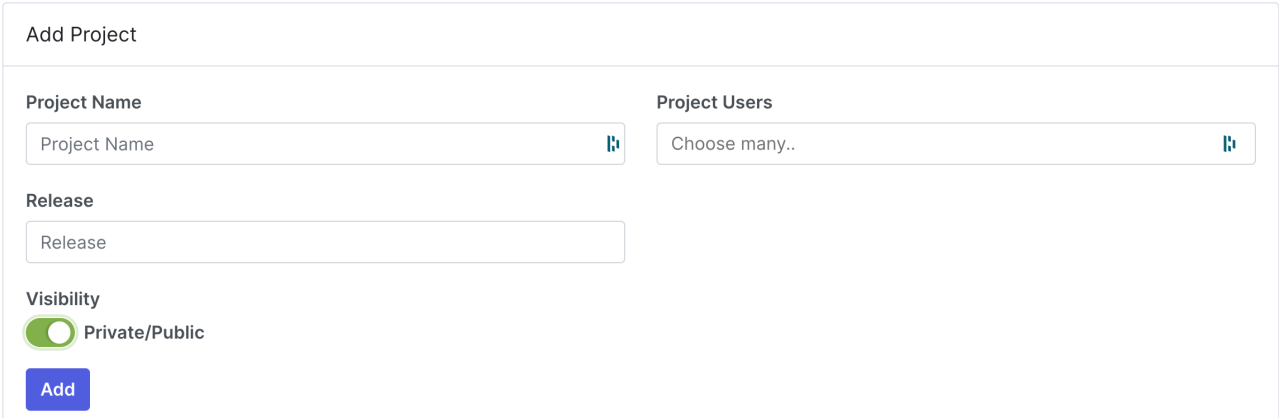


Yellow clipboard icon:	Edit user (name, email address etc)
Blue tick icon:	Make user an admin for that organisation
Red bin icon:	Delete the user (this can not be undone)

Projects

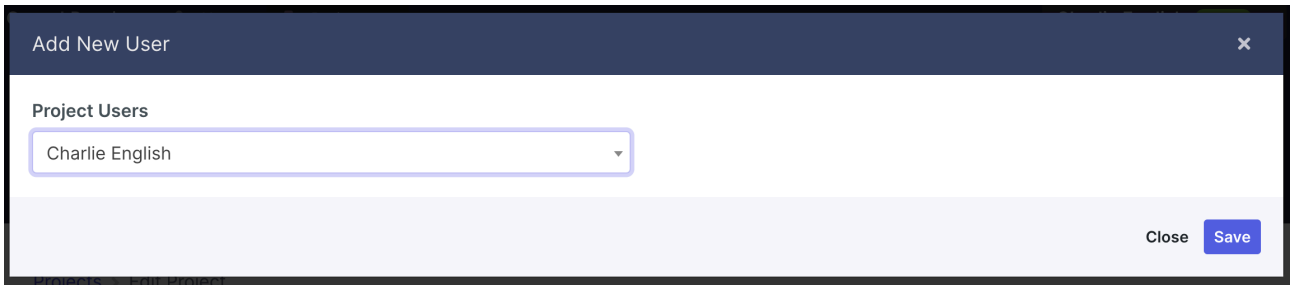
A project can be created by an administrator. Projects can either be public (i.e. visible to everyone in the organisation), or private (i.e. only visible to users in that organisation who have been added to the project).

To create a new project, click the “New Project” button after logging in, and fill in the following form containing the project name, the visibility and the name of the first release (see the section “Releases” for more information).

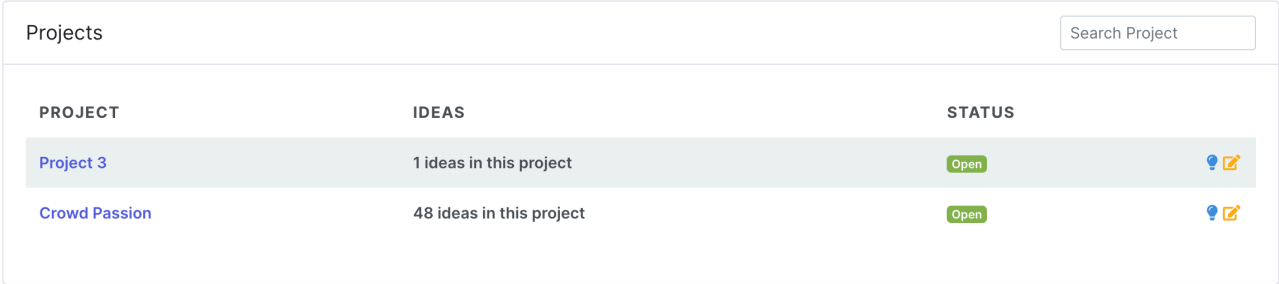


If the project is marked as public, there will be no need to add users to it; if it is a private project it will automatically be visible to admins, and any other specified **existing user**. (To create a user see the section “Users”).

To give permission for an existing user to see a private project, simply select the “New User” button and select the user from the drop down list before pressing save.



You can return to the project admin screen by clicking the yellow checkbox icon from the list of projects (i.e. the default landing page when you log in)



Releases

A release is a “grouping” of user tickets (aka ideas). They can be used to represent an actual software release deployment, if that is how you wish to use them, or they can be used to represent categories of tickets (e.g. to separate bugs from enhancements).

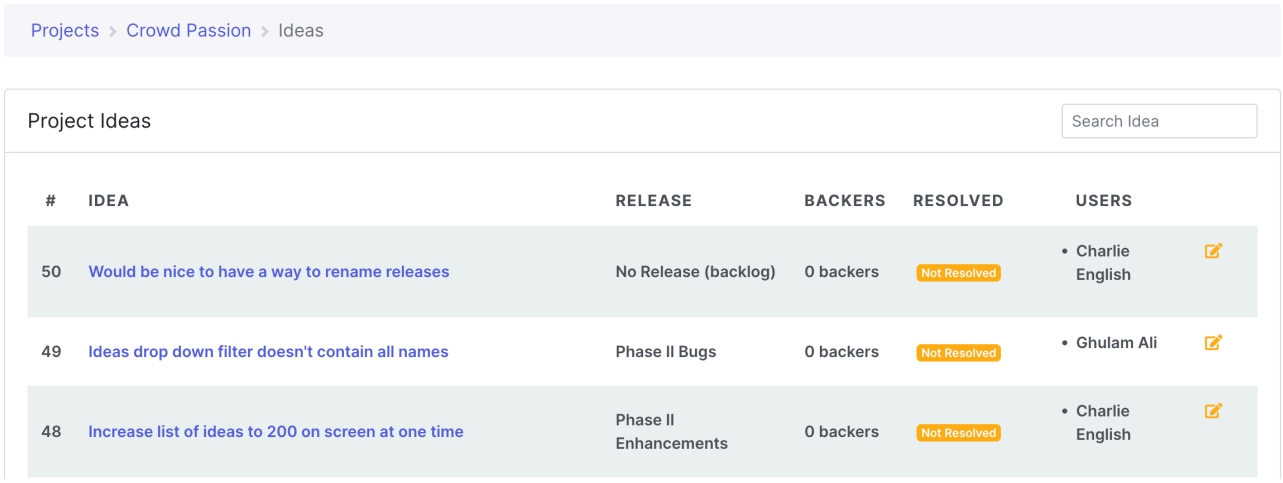
You can assign tickets/ideas to a release in order to group them into logical containers.

Releases can be opened and closed by a project administrator in order to keep the ideas list clean (see Admin Only Features).

Ideas (aka tickets)

An idea is a suggested enhancement - it could be a bug, a feature enhancement, a background task that needs to happen - or anything else you can imagine!

When you click a project name from the default post log in screen, you will automatically be shown a list of all the ideas/tickets in that project.



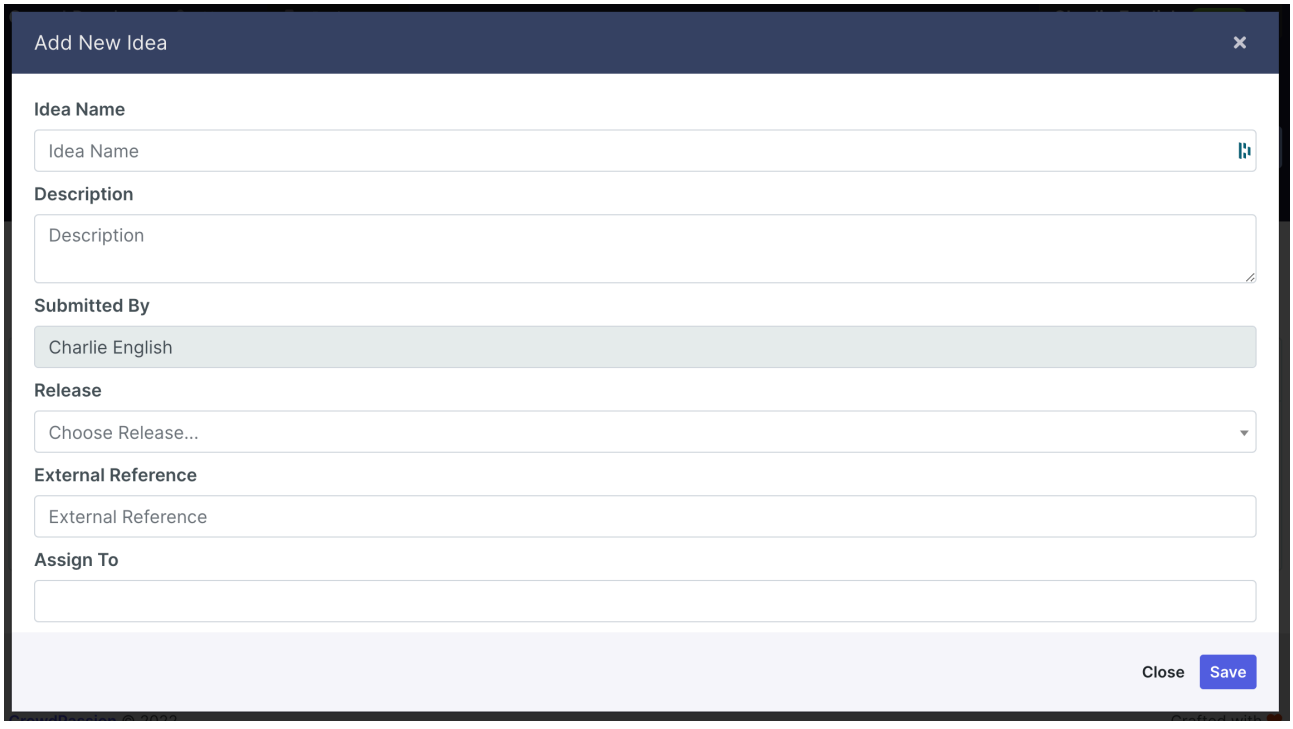
Ideas can exist in one of three states:

Open/Unresolved: This is the default state when ideas are first created

Open/Resolved: Used to denote the idea has had an action performed on it, and is awaiting closure (i.e. a developer has resolved the issue and the idea now needs testing before closing)

Closed: The idea is now closed, it needs no further action performing on it, it will appear in the ideas list with a strike through line

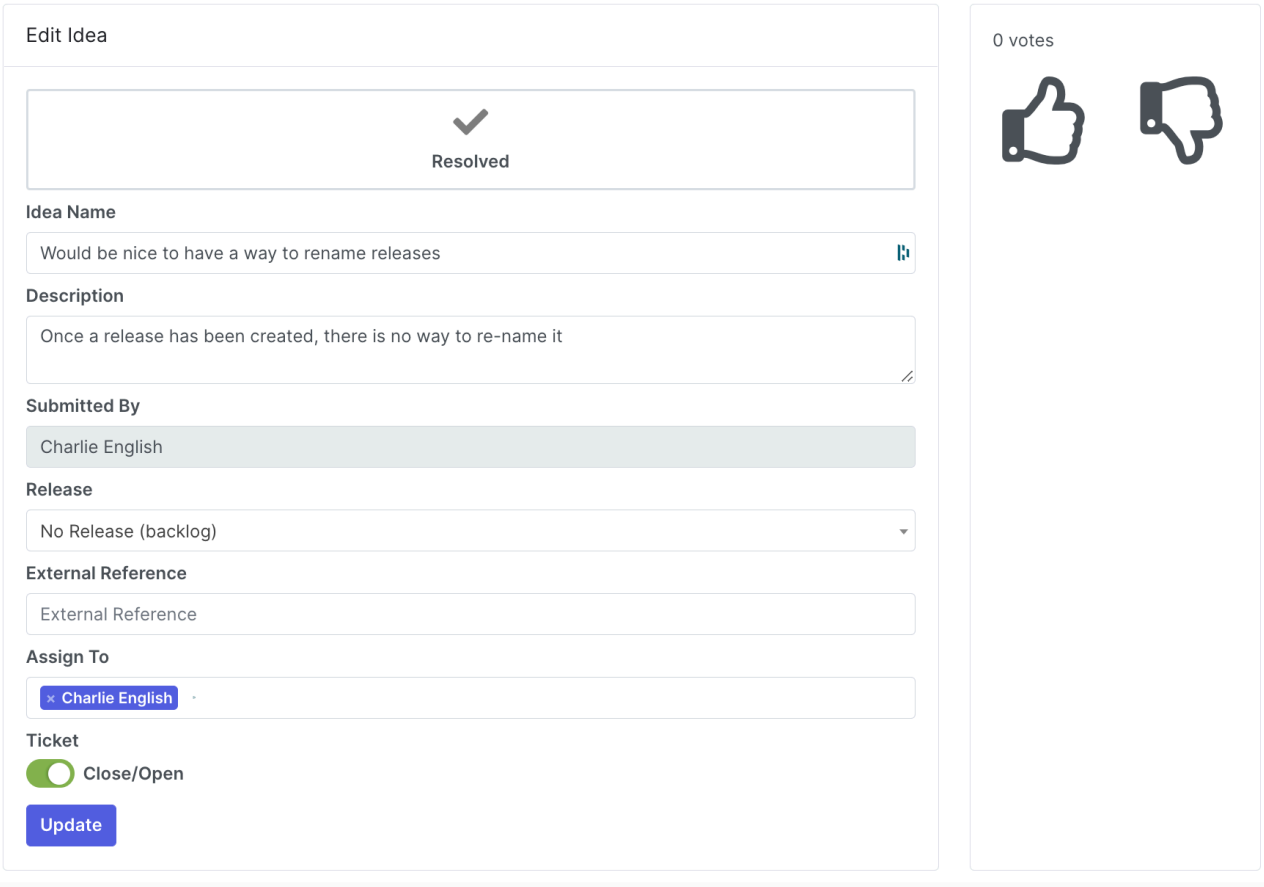
To create an idea, simply click the “New Idea” button, you will be asked to fill in the following form:



Idea name:	Enter a short description of the issue/ticket
Description:	A long form description of the issue under discussion and the resolution
Submitted by:	Auto generated field of the current logged in user
Release:	Select which release this ticket should go into, or put it in the backlog
External reference:	Enter an external reference here - can be anything (e.g. jira reference)
Assign to:	Who should this ticket be assigned to? (can be blank)

Editing an Idea

Clicking the name of the idea from the idea list screen opens up the edit idea screen, which contains three additional features:



You can mark an issue as resolved, using the large button in the header.
You can mark an issue as closed, using the slider at the bottom.

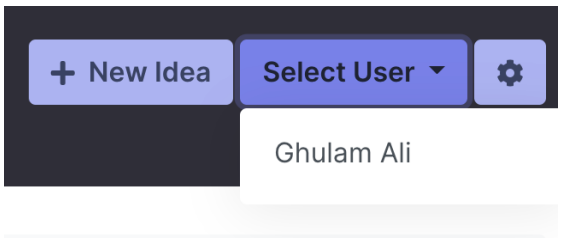
Resolved is used to denote the idea has had an action performed on it, and is awaiting closure (i.e. a developer has resolved the issue and the idea now needs testing before closing).

Closed is used to denote the idea needs no further action performing and it will appear in the ideas list with a strike through line.

Finally you can “thumbs up” or “thumbs down” to vote for/against the idea to aid prioritisation.

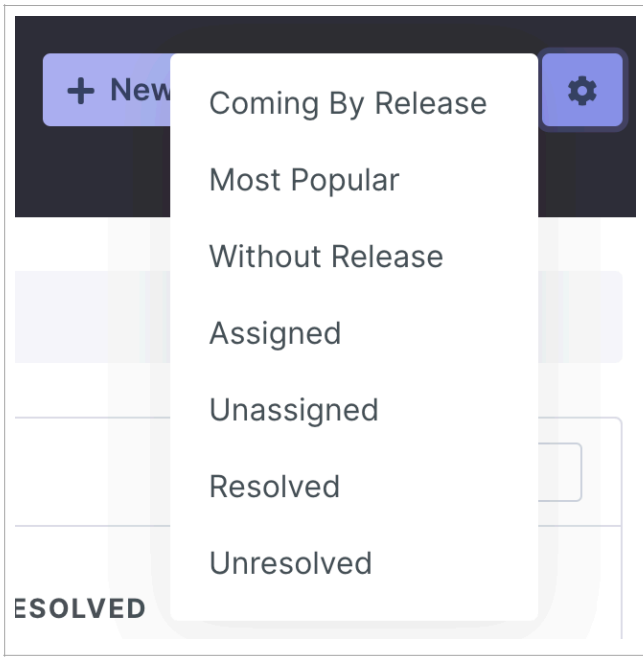
Filtering the ideas list

You can filter the ideas list to make it more useful. First of all there is the “Assigned to” filter - you can access this by clicking “Select User” from the heading button:



In this instance, clicking the user name “Ghulam Ali” will filter all tickets/ideas assigned to this user.

There is a further way to organise the list by clicking the cog icon:



These will filter the ideas list as follows:

Coming by release: Groups tickets by release; a very useful filter

Most popular: Groups tickets by ones that have been voted up the most

Without release: Tickets in the backlog (i.e. not assigned to as release

Assigned: Tickets assigned to someone (doesn’t matter who)

Unassigned: Tickets not assigned to anyone

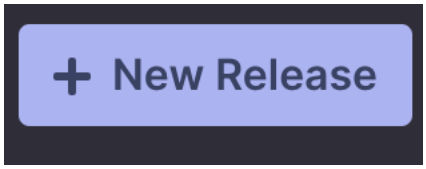
Resolved: Tickets marked as resolved

Unresolved: Tickets marked as unresolved

Admin Only Features (Advanced)

Admin Only: Creating a release

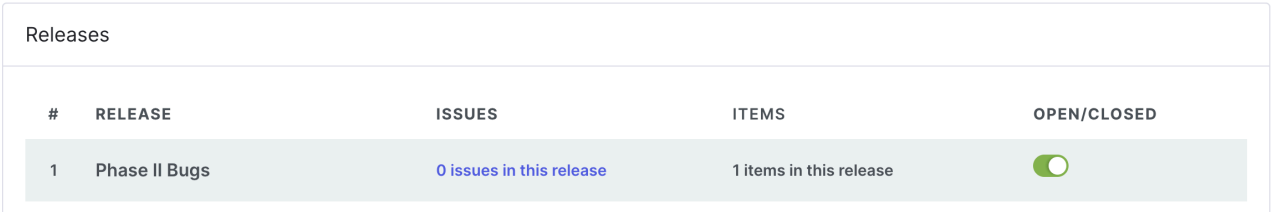
To create a new release visit the project admin screen (see “Projects” section) and click the yellow clipboard icon against the project you wish to create a release for, then simply click the “New Release” button in the header:



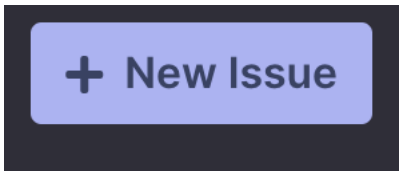
Simply type the name of the release, and click the “save” button.

Admin Only: Recording release issues

On the project admin screen (see “Projects” section), you can see a list of releases



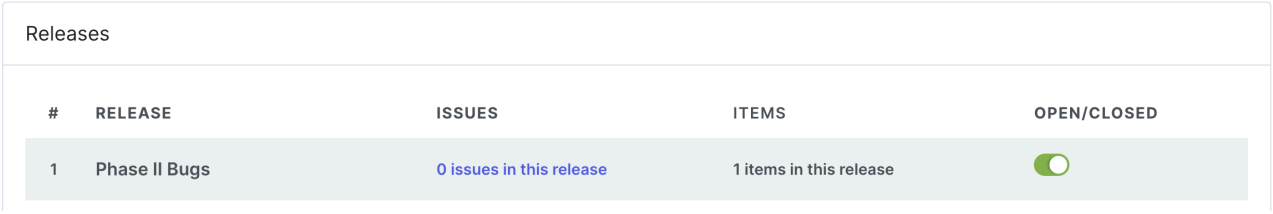
If you click “0 issues in this release”, you can click the “New Issue” button to record an issue for the release:



Where a release has an issue, you will not be able to close a release until all issues are resolved (See “Closing a release”) - hence they are useful for recording actions you must perform before you are allowed to close out a release - for example checking with other departments before you release).

Admin Only: Closing a release

On the Project Admin screen (see Projects section), against a list of releases there is an open/close slider. When you close a release, ideas/tickets for this release will no longer appear on the ideas screen



If the release has open **issues** (as opposed to ideas/tickets) you will never be able to close the release; this is a failsafe to ensure that any mandatory pre-release checks are performed (see “Recording release issues”).

If the release has no open issues but does have open ideas/tickets then you **will** be able to close this release. The system will then ask you what to do with the open ideas/tickets. You can choose to either move them to a different release, or to remove the release from these tickets and add these tickets to the master backlog.

If the release has neither an open issue, or an open idea/ticket then the system will allow you to close it without further query.