JIRA

Tutorial Document

Flowtrac

Setting Up JIRA for the First Time

First, contact us at Flowtrac to get a user added to the JIRA Portal system. You will need to give the email address of the new user to a member of our staff. Any person who will be submitting a ticket at any time should have their own JIRA Portal user login. To contact Flowtrac to add a user, call our office at 817-421-3311.

When you receive a welcome email from our JIRA Portal ticketing system, there will be a blue hyperlink in your email. Click the blue hyperlink that says "Visit the portal" to set up your user. Do not respond to this email; we will not receive any emails if you click reply.
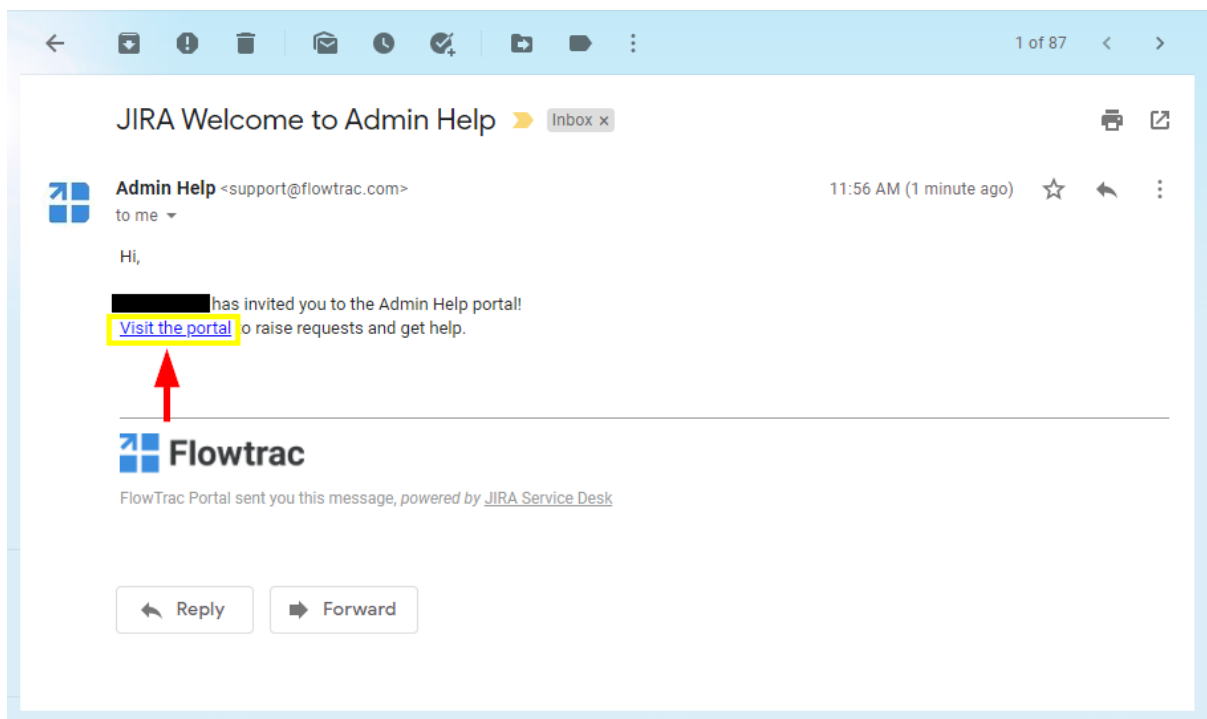
Your username will be displayed at the top (underlined here in green). Your username is your email address; this is how you will log in to JIRA for all tickets and responses. Enter your first and last name in the "Full name" text field. Next, enter your password: please remember the system is case sensitive. Click the "Save and continue" button when finished.

You will now see 4 options to request help from Flowtrac. All **Questions** are answered within 2 business days, **Bugs** are responded to within 4 business days, **New Features** are responded to within 10 business days, and **Training** comments are responded to within 2 business days. If we reach out and do not get a response after two attempts on any given ticket, the ticket will be closed due to non-activity. This can always be reopened (see our tutorials for more help). Any tickets placed on hold will be closed after 6 months if no further communication is made.

FlowTrac Portal
Admin Help

Question
Have a question? Ask it here.

Bug
Experiencing a problem? Report it here.

New Feature
Want to customize your application? Request a quote here.
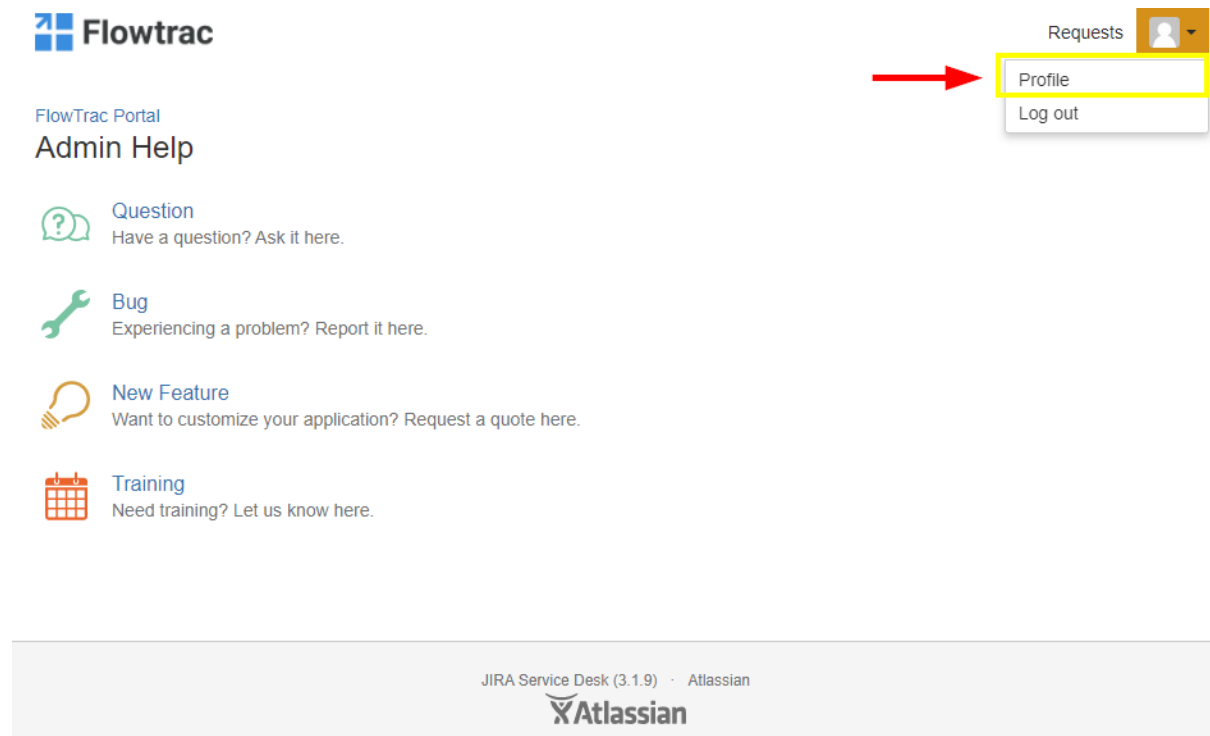
Training
Need training? Let us know here.

Accessing Your Profile/Editing Your Profile & Password

Log in to your JIRA Portal using your username and password. Usernames are always the email associated with your JIRA Portal account; this username will be different from your Flowtrac software username.

Once logged into your JIRA portal, click on the arrow next to the profile icon (top right corner, looks like a person icon) and select the profile option.

Flowtrac

Requests

Profile
Log out

FlowTrac Portal
Admin Help

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JIRA Service Desk (3.1.9) · Atlassian

Atlassian

You can edit your profile by clicking on one of the two options highlighted in yellow.

Within your profile, you can: edit your avatar, your full name (this is not your username, but rather how others see you on a JIRA ticket), time zone, and change your password simply by clicking on the blue hyperlinks.
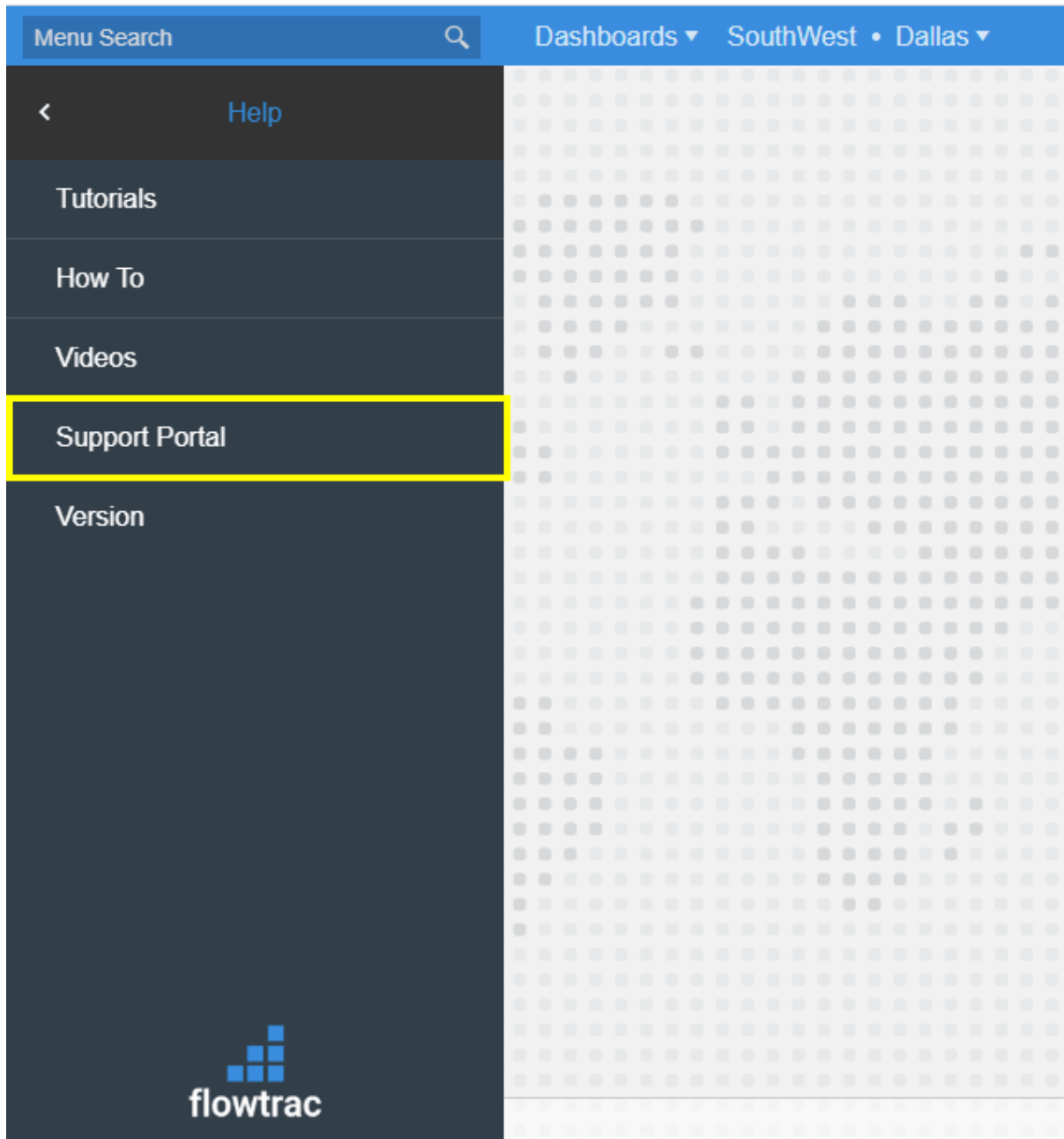
Accessing JIRA from Within Your System

Open the Menu, select Help, and then Support Portal.

Log in to your JIRA Portal account using your username and password. Usernames are always the email associated with your JIRA portal account; this username will be different than your Flowtrac software username.

Click the area that you need help in.

Explanation of Ticket Types:

Question: general questions that do not fit into the other categories

Bug: any bug or error message that comes up in the software; this could also include the system taking too long to load

New Feature: any feature you want to have added to your software or a question about if it's possible to add or customize a portion of your software

Training: to schedule training or ask us how something may work inside of your software

Help - Support Portal   ⋮ ✕

Flowtrac   Requests   👤 ▾

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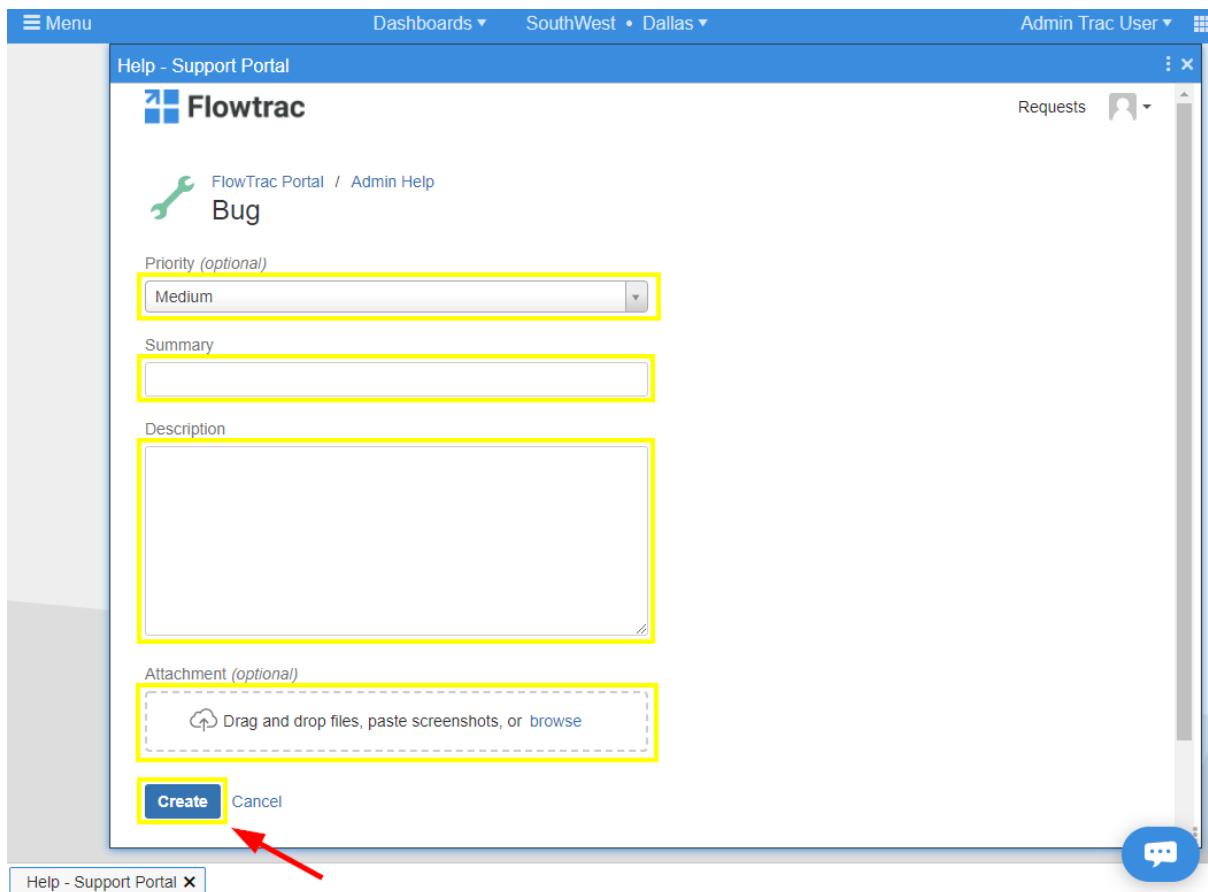
JIRA Service Desk (3.1.9)   ·   Atlassian

✕Atlassian

Help - Support Portal ✕

Submitting a Question

For questions, fill in a brief summary and then in the "More Detail" section, fill in as much detail as you can to allow us to help you. You can then add a file or image if you wish. When finished, click "Create."

Submitting a Bug

For bugs: Set the priority of the bug ticket. Give a brief summary in the Summary box. In the description, enter a detailed explanation of how you received the error and any other information that can help us fix the problem. It is best to take a screenshot of the error and attach the image. Make sure when you take a screenshot, you take a snapshot of the *entire* desktop area. The best way for us to see the screenshot is to upload it as an image- not into a word document. For an explanation on screenshots, see the bottom of this document. When finished, click "Create."

Submitting a New Feature

For a new feature, give a brief description/explanation of what you want in the "What do you need?" box. In the description box, give us as much detail as you can about the feature you want. When finished, click "Create." You can also change the priority of this ticket.

Scheduling Training

When scheduling training, first type a brief summary in the summary box. In the description, give us as much detail as you can about what you want training over or what you're wanting to know how to do in your software. When finished, click "Create."

Screenshot Requirements

For taking a screenshot:

Make sure that you are taking a picture of the entire screen by using your snipping tool. If possible, include the error message and the URL (see example below). Attach the screenshot onto your ticket as an image. DO NOT place inside of an Excel or Word document. Images placed inside of an Excel, Word, or other document are difficult for us to see after extraction. Cell phone pictures are often difficult to see; use this only as a last resort. The clearer the image and more of the screen we can see, the faster we can isolate and correct a problem. For more help, refer to the "Screenshot Help" section of this document.
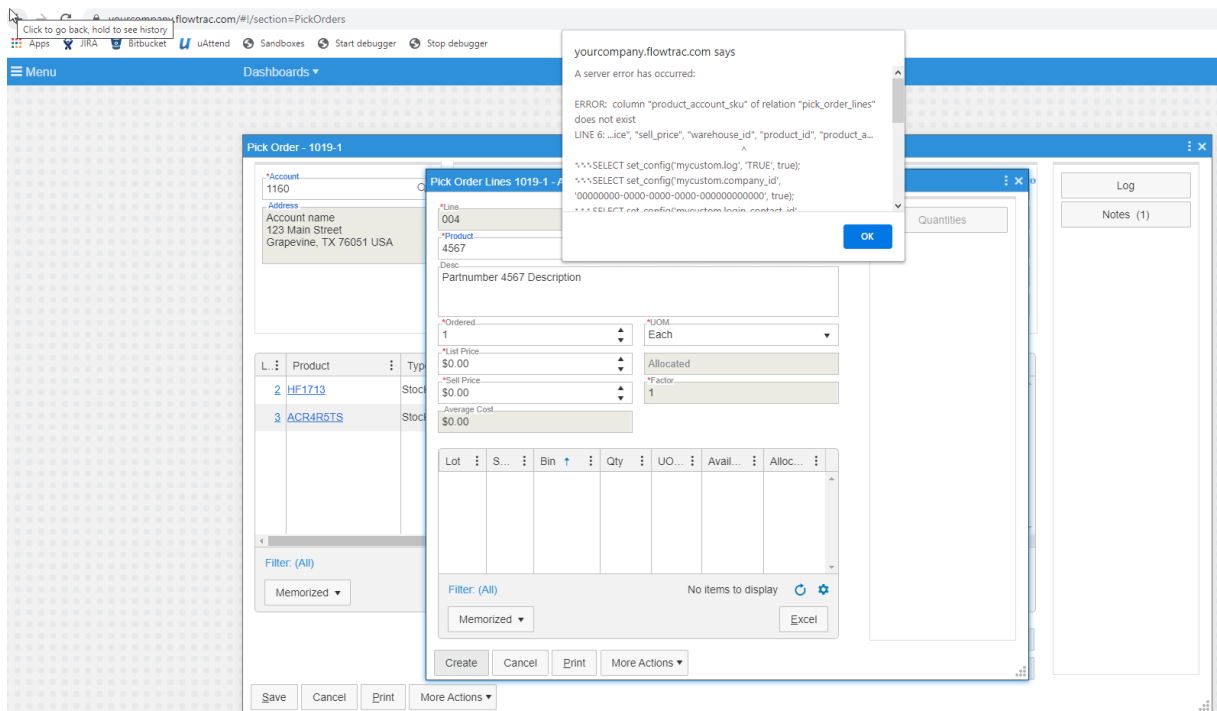
Who to Include in Your Ticket & How to Add Users

When creating a ticket, a programmer is automatically assigned to your ticket. DO NOT include the programmer in the "People involved" area. This area is to add others in your company whom you wish to see or be a part of the ticket that has been opened.
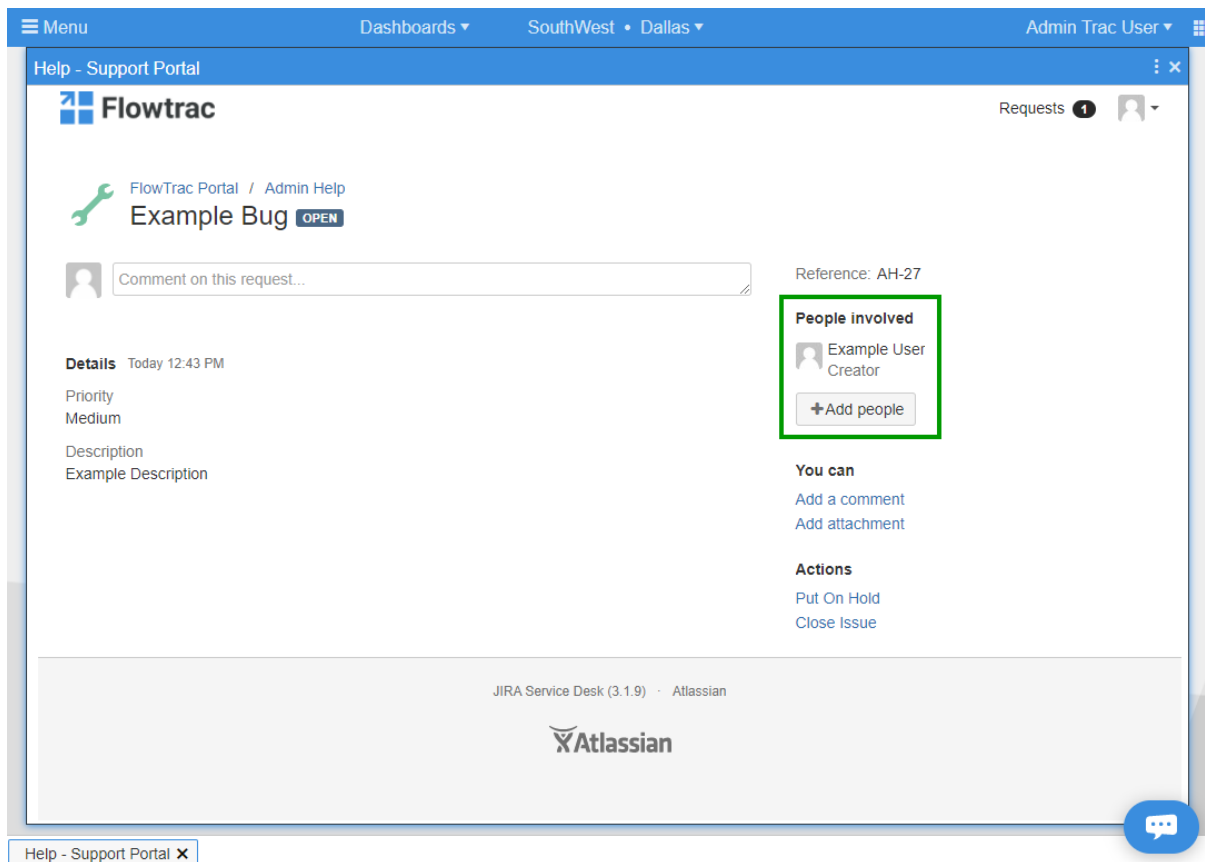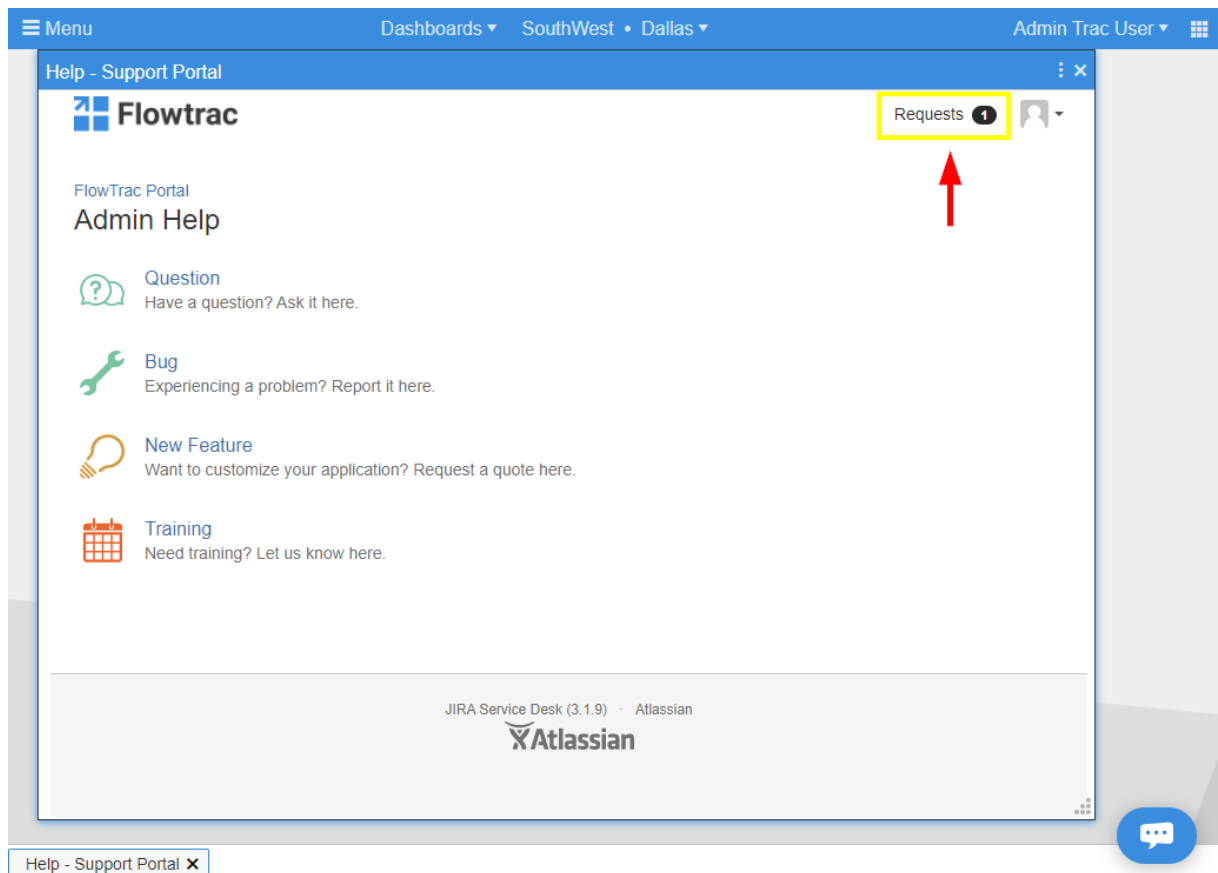

To add a user to the ticket, click the "+Add people" button (under People involved). Type in their email address and click "Add."

Accessing Your Tickets

Log in through your portal in your Flowtrac system or by going to:

portal.flowtrac.com/customer

Once logged in, click "My requests" (top right corner, left of the person icon).

A current list of the open requests that you have created will appear.

To view all open requests where you are a participant, select "Where I am a participant" from the first drop down menu.
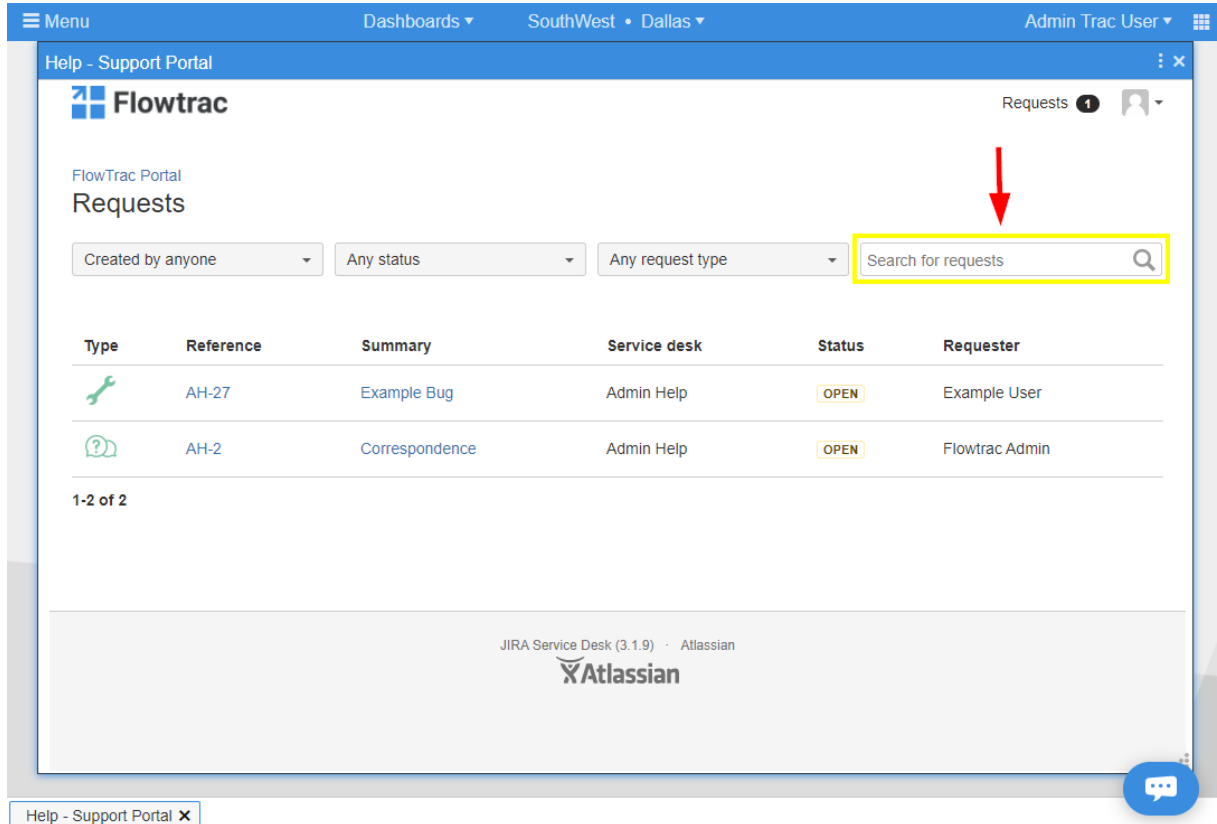
Adjust the other drop-down menus as necessary to find the ticket(s) you are looking for. If you simply wish to search for a ticket number (also called reference number), type the desired ticket number into the search box.
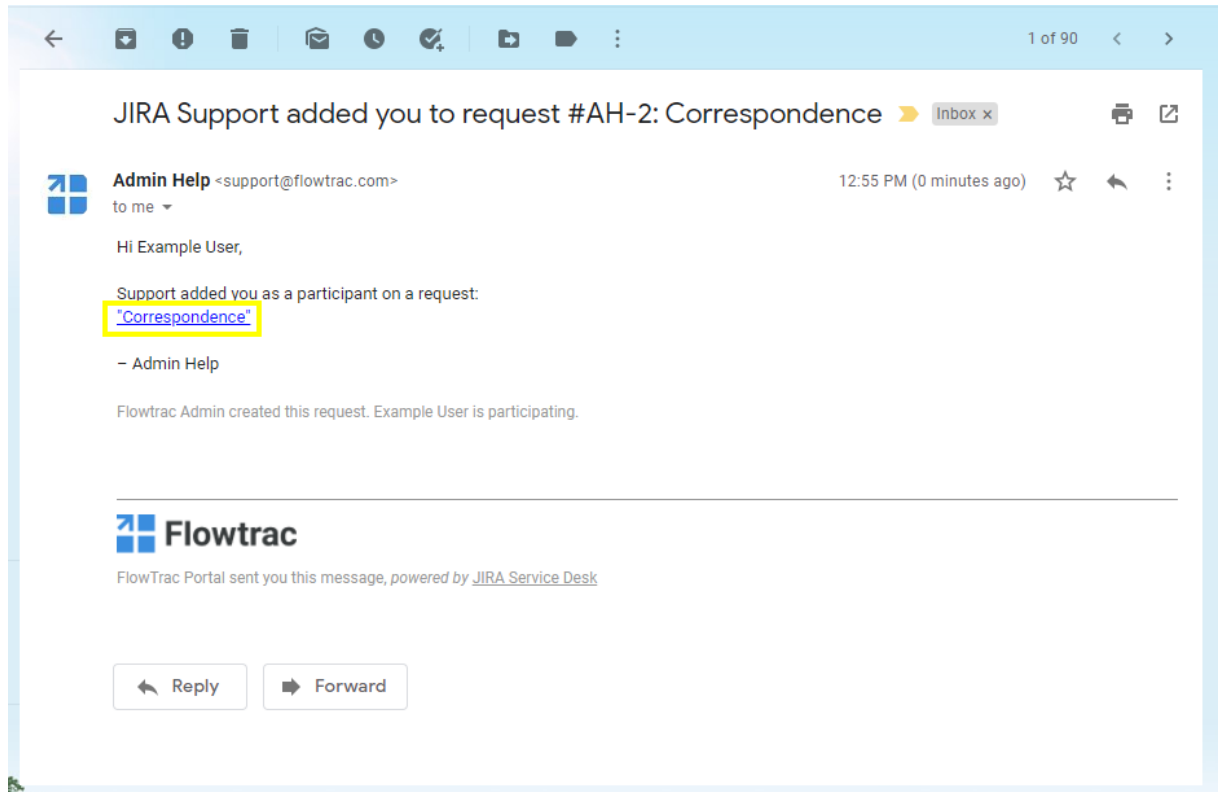
Any time the status of a ticket is changed, a comment is made, or anyone has been added to a ticket, each person involved will receive an email. Access each of these tickets by clicking the link (blue hyperlink) in that email.

If you attempt to reply to the email by clicking reply in your email account or outlook, your message will not be sent to the appropriate person. Your message will go to an unmonitored and regularly purged generic email address called "support." Please make sure that you respond by logging in to your JIRA Portal and commenting on the appropriate ticket. The person intended to see your message will only do so once a response has been made this way.

Attaching Files, Images, and Screenshots

Log in to your JIRA Portal using your username and password. Usernames are always the email associated with your JIRA Portal account; this username will be different than your Flowtrac software Username.

Open the ticket you wish to add the attachment to. On the right side of the screen, select "Add attachment," click your attachment, and then select "Add." If attaching an image or screenshot, do not upload in a Word, Excel, or PDF file. Images must be placed as a .jpg or .png file.
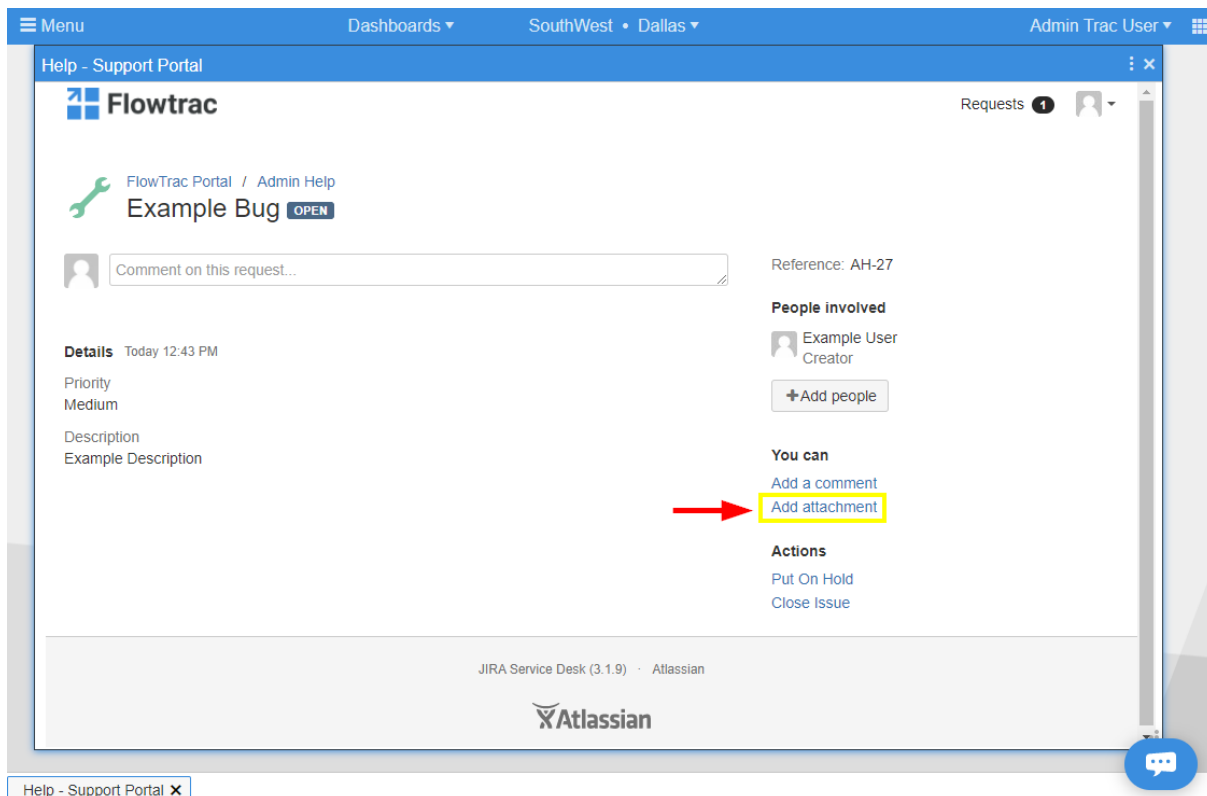
Your attachment will now show up in the Activity feed.
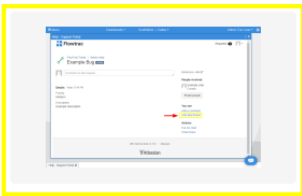
Closing a Ticket

Once logged in to your JIRA Portal, select the ticket you wish to close. Click the "Close issue" button located on the right side of the screen (under Actions, second from top). Note: this can only be done by you if the ticket is reopened; the initial closing of a ticket must be done by someone at Flowtrac. This is to ensure that the problem has been fixed.

Once you click "Close issue," you will see the status of your ticket change to closed (next to ticket name in green).

Removing Yourself from a Ticket
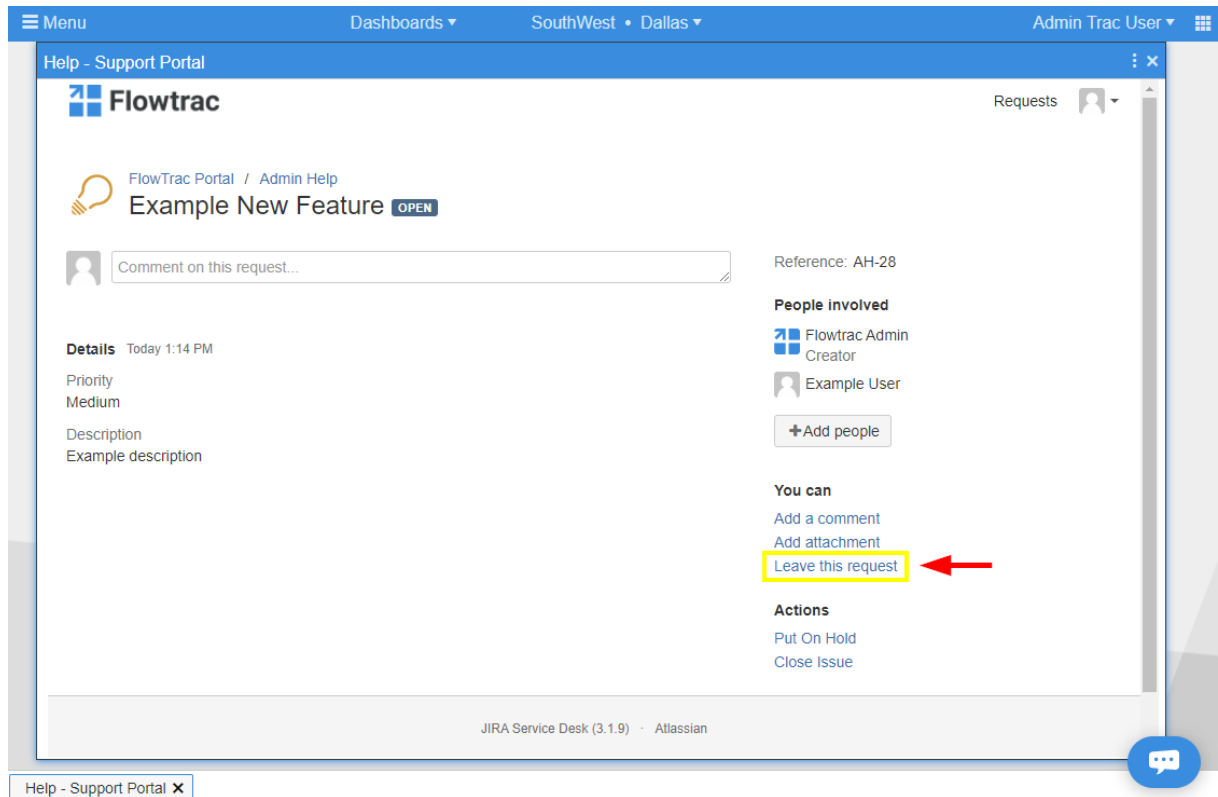
Once you have logged in to your JIRA Portal, select the request you wish to leave or stop getting notifications on. Click the "Leave this request" button (under You can, third from top). Note that you cannot leave requests if you were the creator.

For more help on accessing your tickets, please reference the "Accessing Your Tickets" section of this document.

A system notification window will pop up asking if you are sure you want to leave this request. Once you click "Leave," you will no longer get notifications or be a participant on this ticket. You will not be able to find this ticket unless someone else requests for you to be readded.
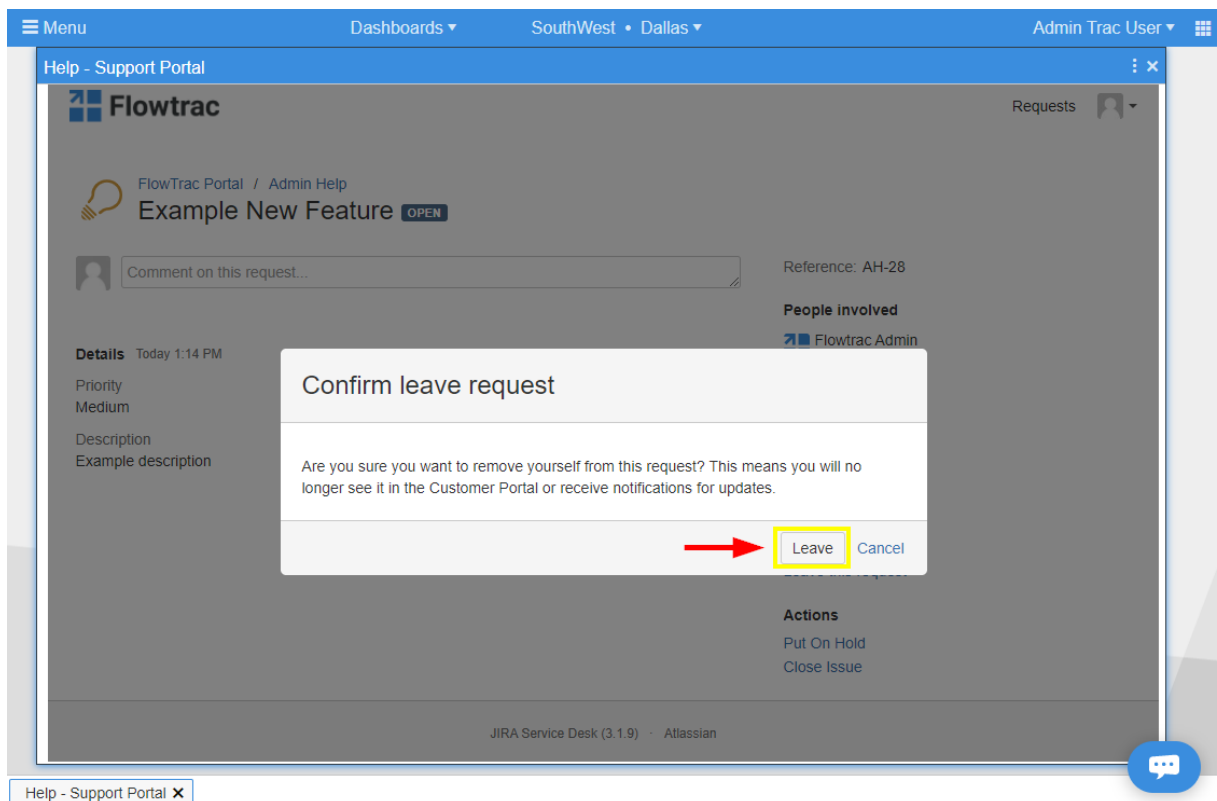
Screenshot Help

There are 2 programs you can utilize to take a screenshot. The first is typically on most computers and is called "Snipping Tool." The second (and one we use most frequently at Flowtrac for its ease and simplicity) is "Greenshot." Greenshot can be downloaded by going to http://getgreenshot.org/downloads/

Make sure that when saving a screenshot, you don't upload into a Word or Excel document. Simply save it under the corresponding files listed below.

<u>For using Snipping Tool</u>:

Go to your Windows start button (this is typically the farthest button on the bottom left and has the Windows symbol on the button). You can either search through your files for the program "Snipping Tool" or search in your search bar.
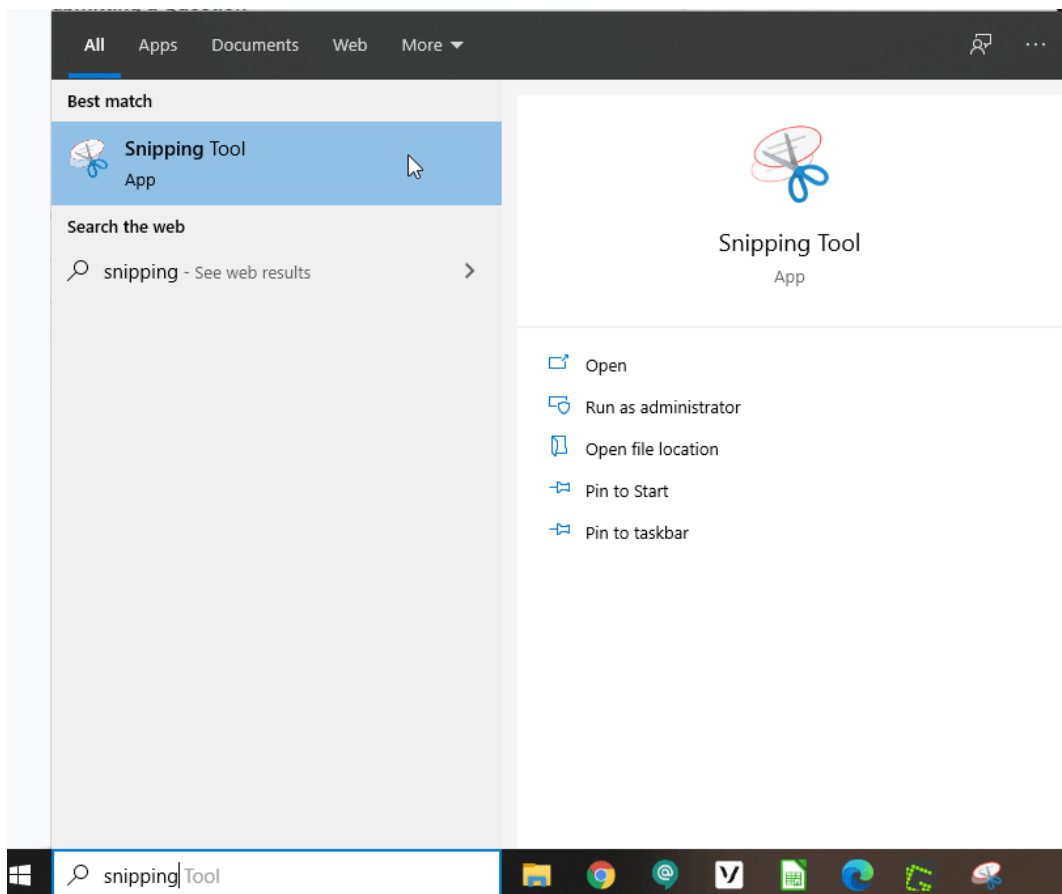
Select the "Snipping Tool" program. Once open, click "New." This will automatically make your screen a slightly grey color and bring up a small box in the corner of your screen.
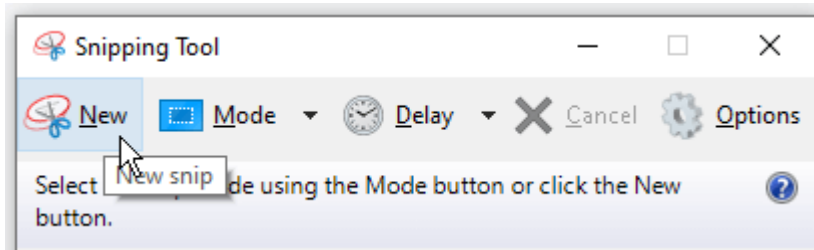
Your mouse pointer will become a small, cross-shaped cursor. Click and drag to highlight the entire screen. Make sure that if you are capturing an error message, you select as much of your computer monitor screen as you can- including the URL or web address.
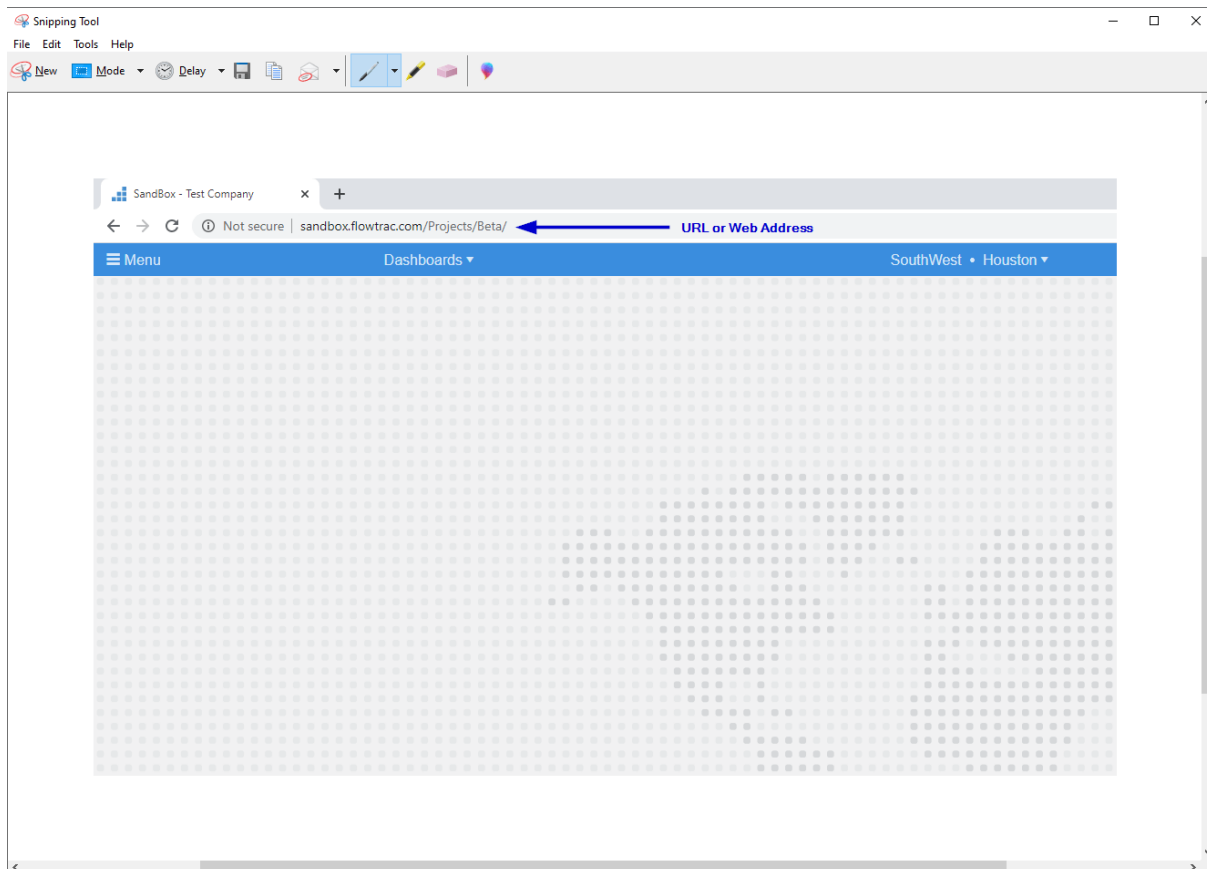
When you have selected your image, save it to your computer under file->save as. A window will pop up.
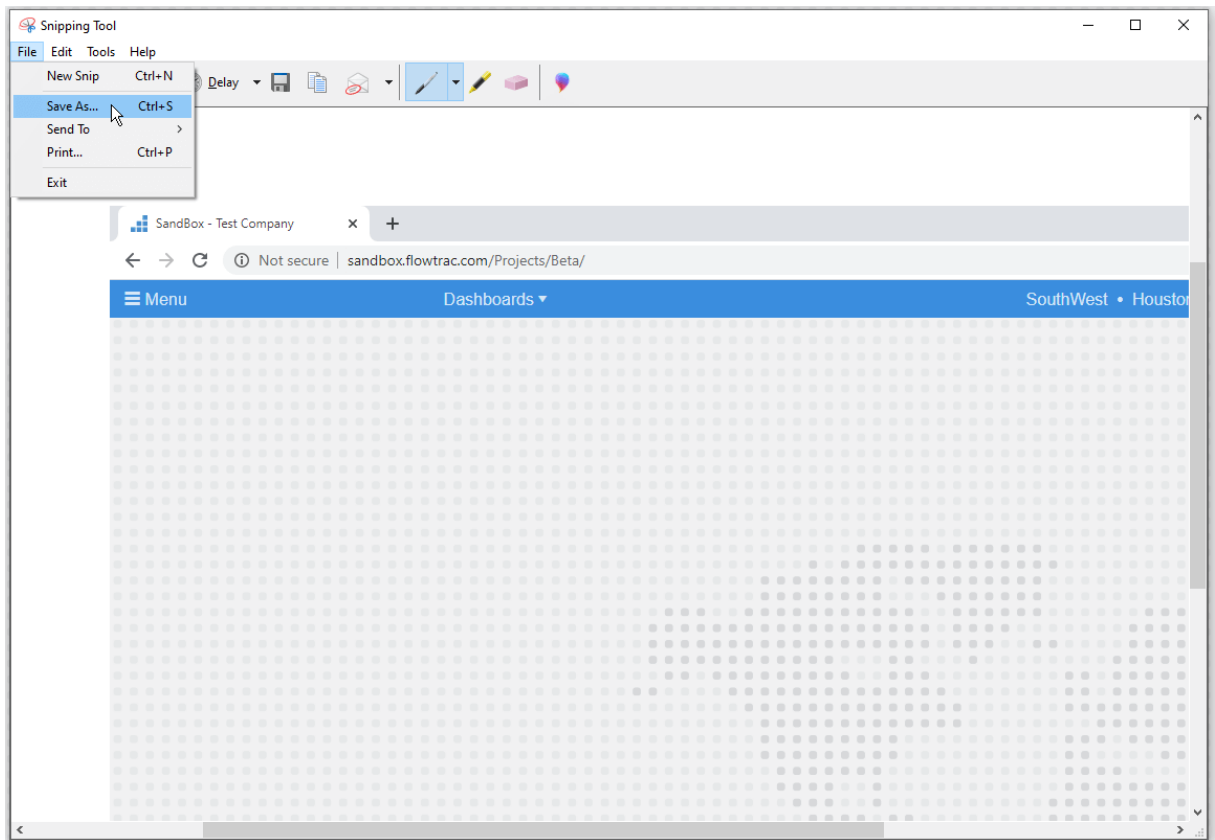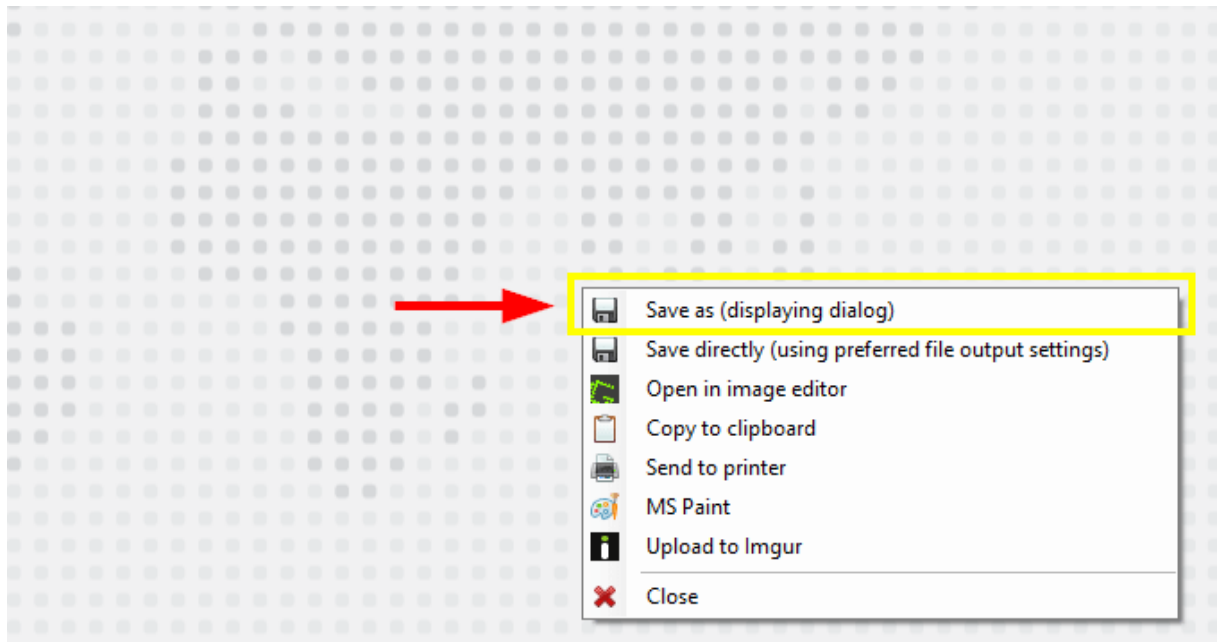

Name your file and save it as either a PNG, GIF, or JPEG file. Once the file is saved to your computer, you can upload it into JIRA easily. If you would like to know more about uploading images to JIRA, please refer to the "Attach files, images, and screenshots" section of this document.
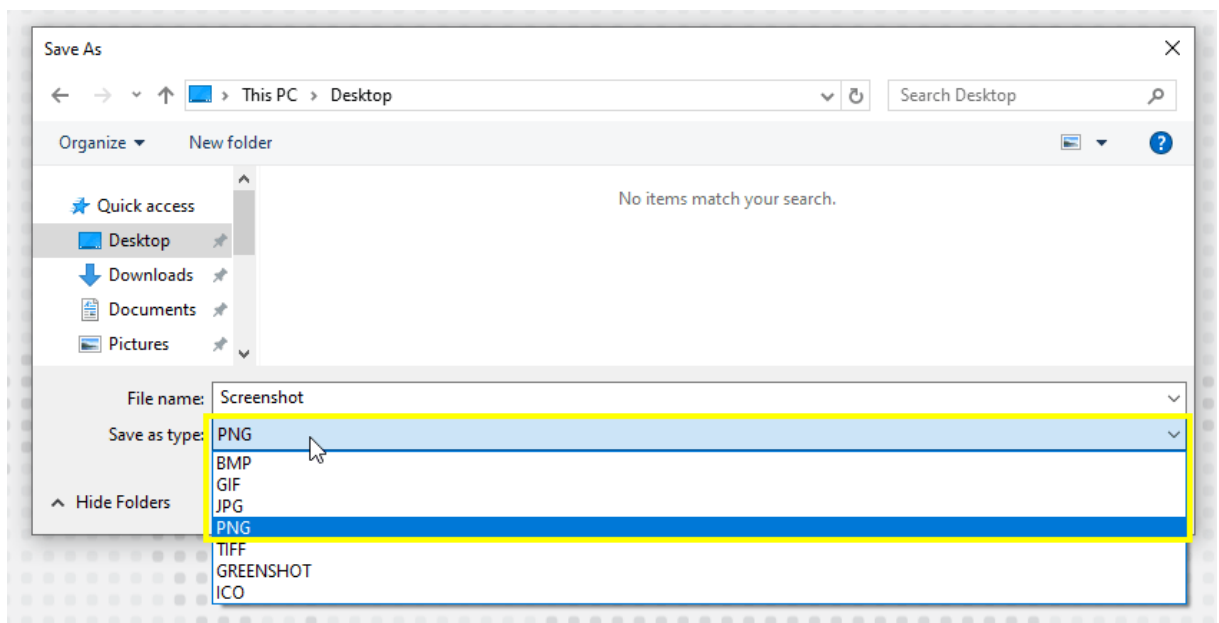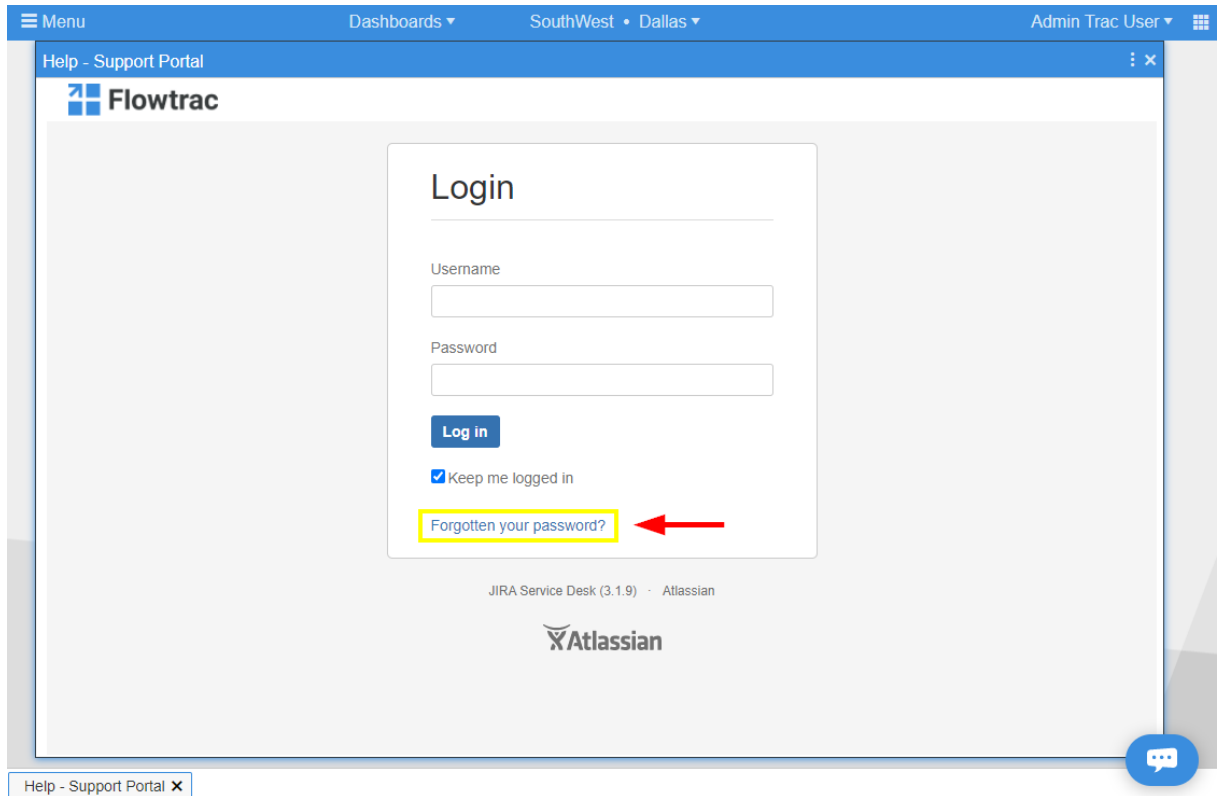
For using Greenshot:

Click the Print Screen option on your keyboard; a cross-shaped cursor will appear. Click and drag over the image you want to capture. Make sure you include the URL or web address in your image.

When you release your mouse, a window will pop up. Click "Save as (displaying dialog)."

Name your image and make sure you save as either a BMP, GIF, JPG, or PNG file.

Once the file is saved to your computer, you can upload it into JIRA easily. If you would like to know more about uploading images to JIRA, please refer to the "Attach files, images, and screenshots" section of this document.

Resetting Your Password

If you forget your password, you can reset it by clicking on the "Forgotten your password?" link on the JIRA Portal login screen.

The system will ask you for your username. This is always the email address we have on file for you. Once you have entered your email, click the "Email me" button.
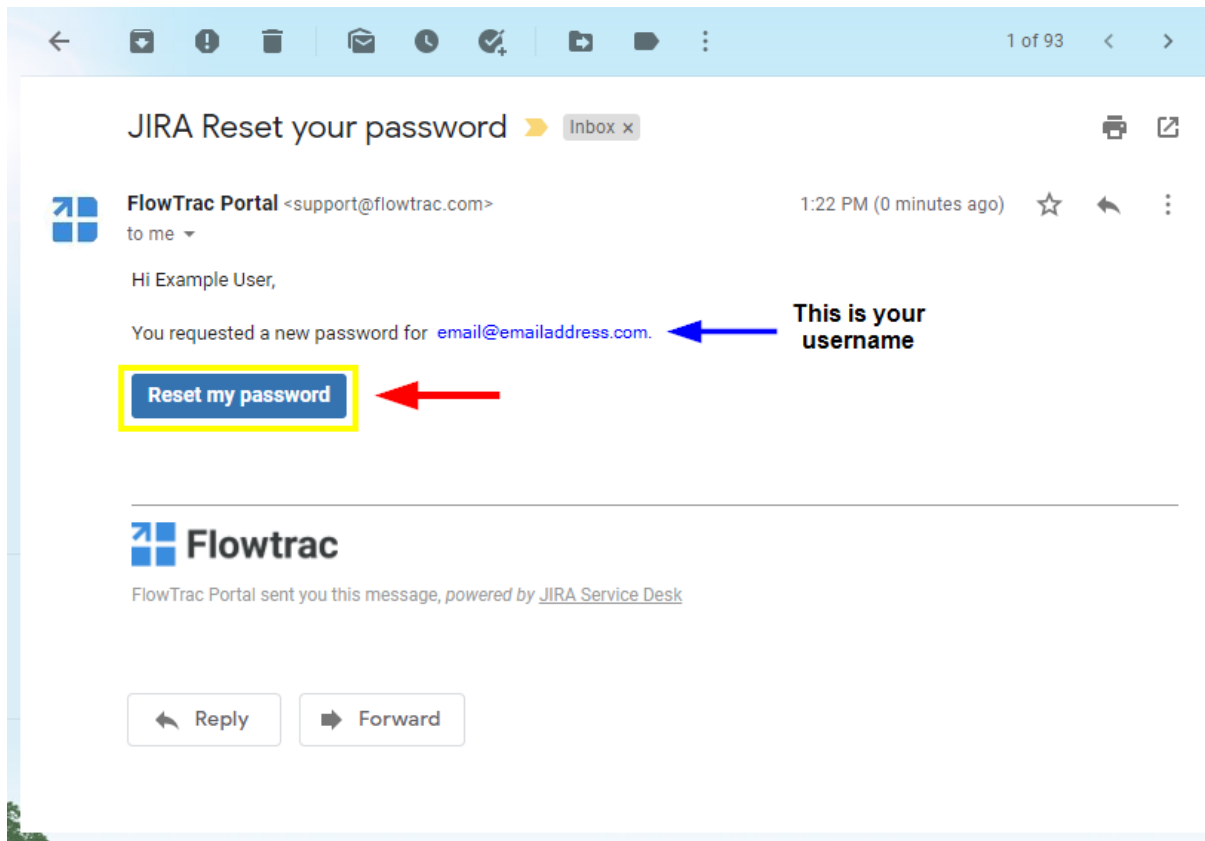

The system will notify you that a link has been sent to the email address you entered. Please locate this email to proceed to the next step. If you do not receive the email in an appropriate amount of time, check your spam folder.
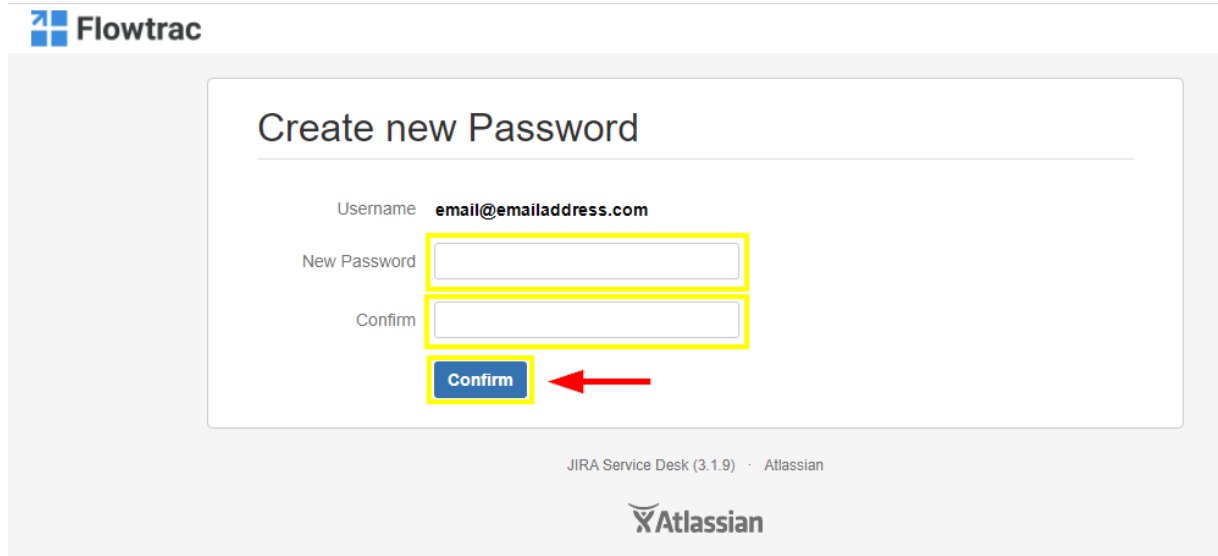
Once you have located the email, click the blue "Reset my password" button.

In this window, you will see your email as your username and boxes to type your new password in. Once you have typed in your new password, click the "Confirm" button.

The system will now take you to your main page.