



Using Redmine's CDCB nominator portal

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A. What is Redmine

Redmine is a cross-platform, open-source, web-based project management and issue tracking tool. Redmine is a flexible tool. It integrates multiple applications and development tools (such as version control systems) into a single framework.

A single Redmine box can contain - and usually does - multiple public or private projects that are managed independently.

In this manual we will cover the details of the “CDCB Nominator portal” project.

B. CDCB Nominator portal

B.1. General information

The “CDCB Nominator portal” is a project that will serve both as nominator-specific documentation and customer service hubs. Access to the project ticketing area (e.g. the new way CDCB staff will be providing customer service) is for registered users only, whereas the documentation is publicly available.

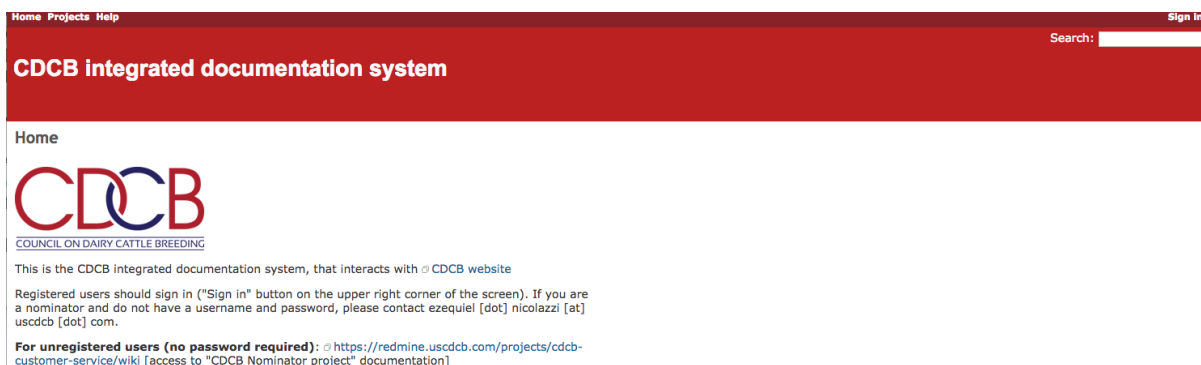
The documentation area will allow CDCB to be much more effective in updating customer service-related information and documentation. The project is semi-public, meaning that the documentation is publicly accessible at <https://redmine.uscdcb.com/projects/cdcb-customer-service/wiki>, whereas the ticketing area is private (requires username and password). In addition, the ticketing area is compartmentalized: it allows each nominator to solely access its tickets functionalities (multiple users of the same company can access and interact with tickets created by their colleagues) and not others. Meaning that a nominator will not be able to view any other nominator tickets/information.

Having documentation and ticketing system in a single environment makes integration of information much simpler, and allows CDCB to produce user-driven documentation.

B.2. Accessing the CDCB Nominator portal

Access to the CDCB Nominator portal is public for non-registered users. Non-registered users will only have access to the documentation area. No public access is allowed to the ticketing service.

Figure B.2.1: Homepage of <https://redmine.uscdcb.com>



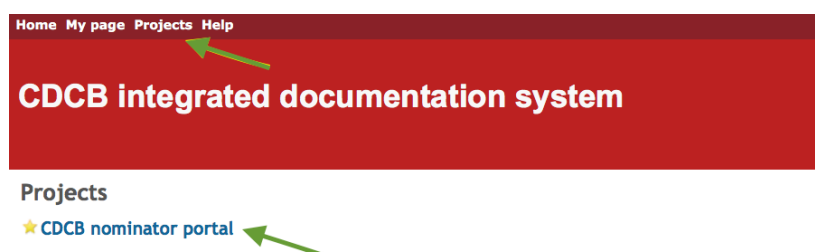
Registration is managed manually for obvious security reasons. Nominators without a username and password are required to send an email to Kaori Tokuhisa (kaori.tokuhisa@uscddb.com) with a request to access the ticketing system.

Registered users can access the project using the following link (login required):

<https://redmine.uscddb.com/projects/cddb-customer-service>

or going to <https://redmine.uscddb.com> and clicking on “Sign in” in the upper left side of the screen. Once logged in, go to “Projects” and then click on “CDCB nominator portal”.

Figure B.2.2.: Accessing the Nominator portal “*the hard way*”



B.3. The CDCB Nominator portal

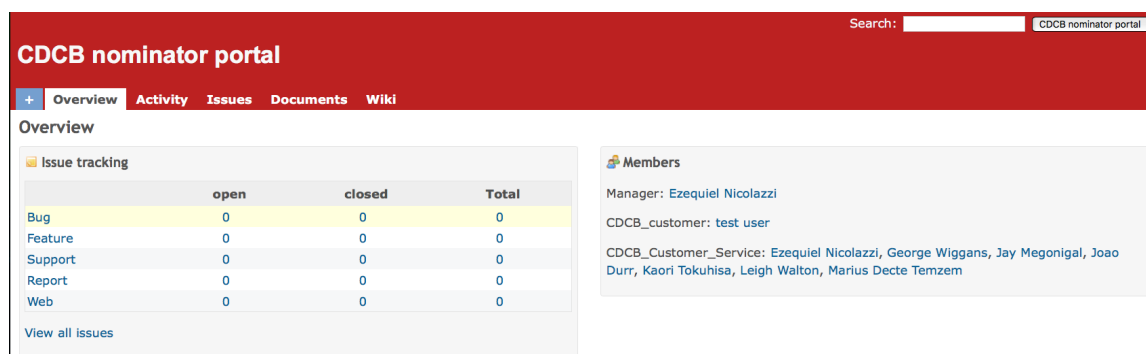
In this manual we will only cover the registered access. Once accessed, the nominator user will be able to access the 5 menus of the CDCB Nominator portal:

- Overview (semi-public, half of the screen is not accessible by public)
- Activity (registered – public can see menu but not content)
- Issues (registered)
- Documents (public)
- Wiki (public)

B.3.a) “Overview” menu

The “Overview” menu is a quick summary of the project status: Users (and groups) will be able to quickly review the number of open and closed tickets by tracking type.

Figure B.3.1: Screenshot of the CDCB nominator portal “Overview” menu.



B.3.b) “Activity” menu

The “Activity” menu shows the most recent activity of the account. Users can filter the information on this screen by selecting the type of activity on the right hand side of the page.

The information provided will not only include the timestamp of the event, but also, the title, the link, a short preview of content and the user that originated the activity.

Figure B.3.2: Screenshot of the CDCB nominator portal “Activity” menu.

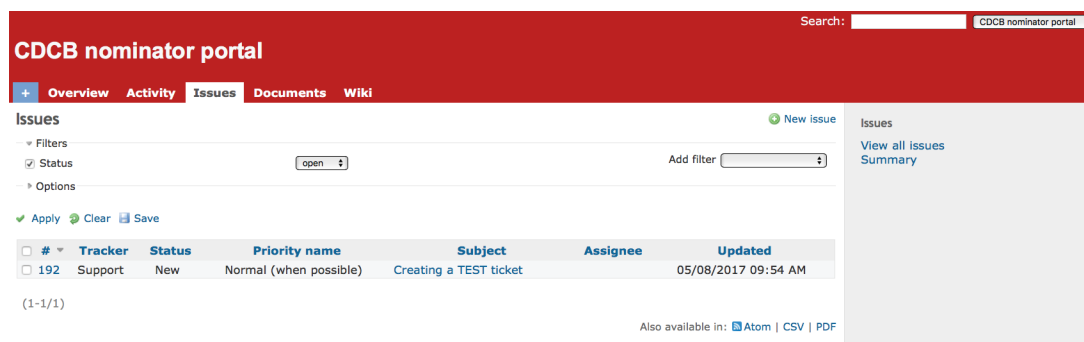


B.3.c) “Issues” menu

This is Redmine’s ticketing system. In this page it is possible to **view, create and edit** tickets (named “issues”, in Redmine).

By default, this page will show all open tickets, and provide a quick set of important information (number of tickets, status, title, assignee, and latest update of timestamp). Users can change this default behaviour by modifying the filters on top of the list of issues or on the right hand side of the page.

Figure B.3.3: Screenshot of the CDCB nominator portal “Issues” menu.



Please see section B.4. for more information on how to interact with this section.

B.3.d) “Documents” menu

This is a repository of documents. Each document uploaded to this section is downloadable. Again, documents can be sorted by category, date, title and author.

Figure B.3.4: Screenshot of the CDCB nominator portal “Documents” menu.



B.3.d) “Wiki” menu

This section is where all the new CDCB customer service documentation is being created and updated. The current “wiki” section contains 4 macro-areas: 1) Useful documents; 2) Codes and useful information; 3) Procedures; 4) Files and formats.

The information contained in this section is quite self-explanatory. Users are encouraged to provide feedback on missing/incorrect/unclear information provided in this section.

Note that in the top right corner of the user screen, there is a powerful search engine. Users can query the entire documentation using keywords of interest.

Figure B.3.5: Screenshot of the CDCB nominator portal “Wiki” menu.



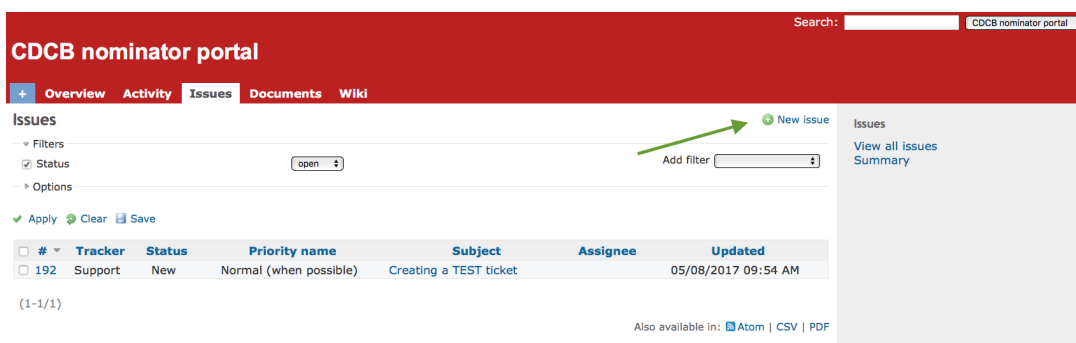
B.4. Creating, editing and interacting with “Issues” (tickets)

Tickets can be created and edited in two ways, via browser or via email.

B.4.1. Interacting with Issues via browser

Issues can be created simply by clicking on the “New issue” button on the “Issues” menu (see green arrow in Figure B.4.1).

Figure B.4.1: Creating a new issue via browser



Once clicked, a new screen will be shown, with all the information required to create a new ticket, as in figure B.4.2. Note that values with * are required

The screenshot shows the 'New issue' form in the CDCB nominator portal. The form is set against a red header with the portal name and navigation tabs. The form fields include:

- Tracker**: A dropdown menu with 'Support' selected.
- Subject**: A text input field.
- Description**: A rich text editor with various formatting options (bold, italic, underline, strikethrough, color, background color, list, link, image, etc.).
- Status**: A dropdown menu with 'New' selected.
- Priority name**: A dropdown menu with 'Normal (when possible)' selected.
- Assignee**: A dropdown menu.
- Start date**: A date picker showing '2017-05-08'.
- Due date**: A date picker.
- Estimated time**: A text input with 'Hours' as a unit.
- % Done**: A progress bar showing '0%'.
- Files**: A section with a 'Choose Files' button and a note '(Maximum size: 5 MB)'. It currently shows 'no files selected'.

 At the bottom of the form are three buttons: 'Create', 'Create and continue', and 'Preview'.

- **Tracker:** Type of request (the only admitted is Support – CDCB staff can change the tracker when they manage the ticket)
- **Subject:** The title of the ticket
- **Description:** Brief description of the problem. Files can be attached in the “Files” section (Maximum 5MB).
- **Status, Priority name, Assignee, Start/Due date, estimated time and % Done.** Do not use.

Once all information has been created, click on “Create” or “Create and continue” (to immediately create a new issue). CDCB staff will receive an email about the newly created ticket and from that moment on, any activity on the issue will be reported and tracked. Other than the “Activity” menu, each issue has a history tracking.

B.4.2. Interacting with Issues via email

A much simpler way to interact with the ticketing system is via email. In short, whatever you did before can still be done in (almost) the same way. The difference stands in the email address. Instead of sending an email to a person, you will now send an email to a system. This will mean that CDCB staff will decide internally who is going to take care of your request.

The email exchange will be saved in Redmine in the appropriate ticket history.

A single rule needs to be considered: **do not change the email address or the title of the email.** That’s it.

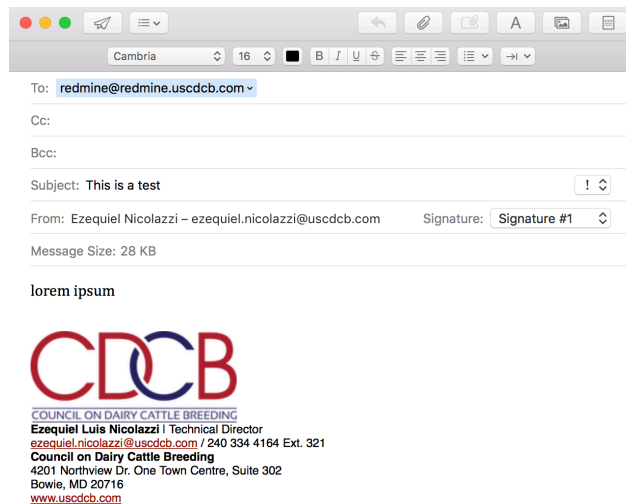
The email address to create/edit a ticket is: redmine@redmine.uscdcb.com

To create a ticket (i.e. issue) in redmine from email, simply compose a new email with the following specs:

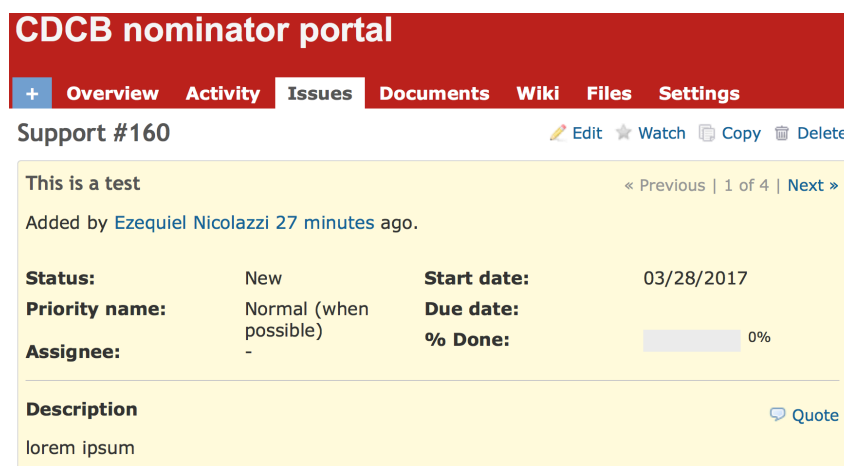
- A specific email address (redmine@redmine.uscdcb.com)
- A specific title of the email (*will be the title of the issue*)

- c) A body of the email (the text), where you explain the request.
 - a. You can cc registered users that will get notified each time an update on the ticket is created.
 - b. You can attach files to the email (up to 5Mb).

Example: **This email**



Will create this ticket:



C. Final considerations

The benefits of this system are multiple:

- i) Documentation and tickets are referable directly by both users and CDCB staff (e.g. links and snapshots of documentation can be included in the reply directly);
- ii) Access to the new ticketing system can be via browser (e.g. username and password on redmine platform) or via email. Minimal impact on the user.

- iii) Users will have one single access point for any request to CDCB;
- iv) Private, centralized management of tickets allows better response to the clients.
- v) Automated tracking system allows users and CDCB staff to recover past discussions or tickets and their threads.
- vi) Documentation is public and directly modifiable by any CDCB staff (not requiring update to webpages and changes to webserver).

CDCB will allow both redmine and email requests for a short starting period. After this initial period is concluded, CDCB will only accept requests through Redmine.