

# Microsoft SharePoint

Owner: Issue Tracking



## Introduction

Create an issue tracking list when you want to manage a set of issues or problems. You can assign, prioritize, and follow the progress from start to finish.

### Process Summary

#### Issue Tracking

1. Create an Area
2. Create an item

## Create an Issue Tracking Area

1. From the Home page, click on **Lists** in the Quick Launch menu.
2. Click on the **Create** button.
3. Select **Issue Tracking** from the tracking category.
4. Give your issue area a name by completing the **Name** field (Fig 1, 1).
5. If you would like a description for your issue area complete the **Description** area (Fig 1, 2).
6. Select **Yes** (Fig 1, 3) for the issue area to be displayed in the quick launch menu.
7. Select **Yes** (Fig 1, 4) to have an e-mail sent when ownership is assigned or when an item has been changed.
7. Click **Create** (Fig 1, 5).

Figure 1

**Name and Description**  
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this list.

Name:

Description:

**Navigation**  
Specify whether a link to this list appears in the Quick Launch.

Display this list on the Quick Launch menu:  
 Yes  No

**E-Mail Notification**  
Send e-mail when ownership is assigned or when an item has been changed.


Send e-mail when ownership is assigned or when an item has been changed?  
 Yes  No

Create Cancel

## Create New Issue Tracking Items

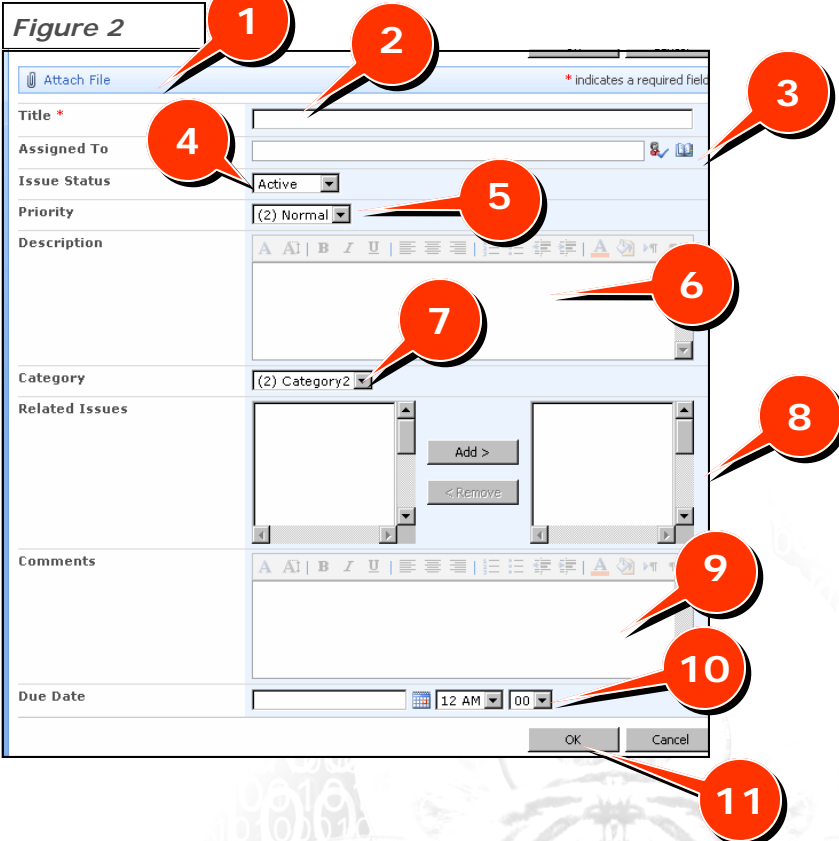
Once you have created an area you can then create items to tack.

1. Click on the drop down arrow next to **New**.
2. You can attach a file but clicking the **Attach File** button (Fig 2, 1).
3. Give your issue item a **Title** (Fig 2, 2).
4. **Assign** the task to someone by typing in the TowsonU username (Fig 2, 3) (use can also use the check names or address book).

 Note: When you created your project tasks if you select to have an email sent when a project is assigned you will see a note at the top reminding you of this.

1. Select an **Issue Status** (Fig 2, 4)
2. Choose the **Priority** form the drop down list (Fig 2, 5).
3. Type a **Description** (Fig 2, 6).
4. Choose a **Category** from the drop down list (Fig 2, 7).
5. **Add or Remove** related issues as they come and go (Fig 2, 8).
6. Type in **Comments** (Fig 2, 9).
7. Choose the **Due Date** (Fig 2, 10).
8. Click on **OK** (Fig 2, 11).

**Figure 2**



The screenshot shows the 'New Issue Tracking Item' form in SharePoint. The form includes the following fields and sections:

- Attach File** button (1)
- Title \*** text box (2)
- Assigned To** text box with user selection icons (3)
- Issue Status** dropdown menu (4)
- Priority** dropdown menu (5)
- Description** rich text editor (6)
- Category** dropdown menu (7)
- Related Issues** section with 'Add >' and '< Remove' buttons (8)
- Comments** rich text editor (9)
- Due Date** field with a calendar icon and time selection (10)
- OK** and **Cancel** buttons (11)