# MANTISHUB

## User Guide

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# Tutorial 1: Getting Started with your MantisHub

We appreciate you taking time out of your busy schedule to trial this service. We know there are quite a few alternatives out there so we feel privileged. We really believe MantisHub has a lot to offer and are optimistic it will suit your needs.

In this tutorial, we'll get you through the basics of managing your software issues as well personalizing your instance.
First off, let's make it your own! Login to your MantisHub and personalize it with your Company name and Logo.

Now, if you head to the 'My View' page, the Getting Started Guide will walk you through the first 4 aspects of setting up your system.


Initially, you're going to Create Projects. For your trial, your first project has already been created for you! We've called it 'My Project'. As you become more familiar with the project fields and how you want to use them, you can always go back into your Project configuration and amend them.

Next, you'll need to create Categories. This allows you to divide up your issues into specific areas. When you report issues, it is created against a category and you can even auto-assign issues in a category to a user/group.

Now you're ready to head to the 'Report Issues' page and start reporting issues! We'll delve more into Issues as we go through the tutorial series.

The last step on the Getting Started Guide is to 'Invite your team'. You'll need to create user accounts and set them the appropriate Access Level. They'll be sent an email with instructions to activate their account.

Once your team member is active, they can personalize their account and Setup an Avatar!

## Tutorial 2: What you need to know about Issues

In your second tutorial, we're going to take a look at some concepts related to Issues. We'll talk about Issue lifecycle, Customization, Filters and Time tracking.

Thanks to the first tutorial, you know how to create projects and categories and report an issue against these. So now it's worth understanding the Issue Lifecycle. As you work on issues and update their status, the issues will move through the lifecycle from 'New' to 'Closed'.

Our paying customers have the option of customizing issue status and other issues fields by emailing the MantisHub team. We'll cover this down the track on Tutorial 9.

To manage your issues, you'll find issue filters very useful. The 'My View' page displays issue with pre-defined filters that would be relevant to you in your day to day use.
The 'View Issues' page allows you to filter issues according to certain criteria. For example, "Issues with Severity major" or "Issues assigned to me, blocking release v2".

You can use simple or advanced filters. You can also save filters and share filters with others in your team.

Another valuable feature for Issues is time tracking. This allows you to track time spent on an issue. It is then easy to see the aggregated time spent per team member on the 'View Issue Details' page.

MANAGERS and ADMINISTRATORS by default will have access to a Time Tracking page where they can get more statistics on time spent across multiple issues and projects.

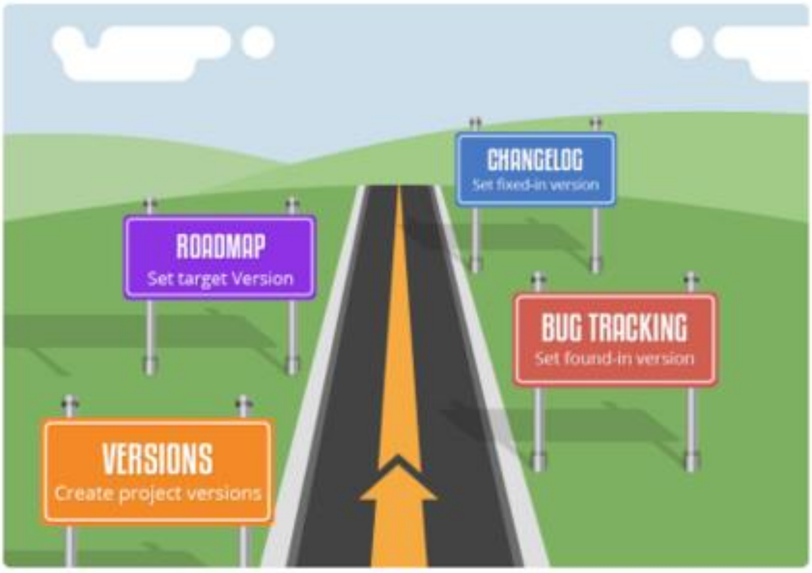
## Tutorial 3: Project Management

In this tutorial, we're going to take a look at some Project Management tools in MantisHub that will help you effectively manage your projects and keep your team members and customers informed about plans and progress. We'll look at the Changelog and Roadmap and how these relate to project versions.

The first two tutorials should have you creating at least one project. One aspect of project configuration that we need to investigate is Versions. Typically software project updates are organized into several versions setup in your project configuration. Versions can be named numerically such as 1.0, 1.1 or may be based on release dates for services, e.g. '20151020'. Your customers will generally report issues against a released version. Your developers will fix issues in versions soon to be released and update this in the 'fixed in version' field. You may also target features for a future release version via the issue 'target version' field. This workflow will tie into the Changelog and Roadmap features in your MantisHub.

The project changelog is an automatically populated page that links your issues to the versions in which they've been fixed and released (or soon to be released). You'll see a display of your resolved issues grouped into the version in which they've been fixed. This allows your team and your customer to know what's been fixed in a particular release.

The project roadmap is an automatically populated page that links your issues to the version in which you plan to fix them. This information can be passed onto customers to show them what's planned for future releases. It also provides status updates by displaying if a targeted issue has already been resolved and displaying a progress bar showing a percentage completion.



## Tutorial 4: MantisHub HelpDesk and Reporting on the Go

You are now reporting issues against projects, assigning 'fixed in versions' and 'target versions' to our issues to generate Changelogs and Roadmaps. Team members are getting assigned issues and moving issues through the issue lifecycle.

We're going to discover MantisHub Helpdesk and we'll also learn a little about our mobile optimized interface.

MantisHub HelpDesk opens up a world of possibilities by automatically creating issues from emails! This can be used client facing as an integrated service desk component of your bug tracker. You can have customers simply email a given address and raise issues in the system. Combine this with our Snippets plugin for your commonly asked questions and you're ready to address your client issues.

You can also make use of MantisHub Helpdesk internal facing to allow your developers to collaborate over email and have this all captured in the issue notes. Maybe you could even setup automated issue creation when a bug failure is detected or crash reported.

It's super simply to set up the MantisHub Helpdesk plugin then just read about how to use MantisHub HelpDesk to determine the email recipient and sender address as well as your email content. This will also let you know where your email reported issue will end up.

You can also comment on issues via email by replying to issue notifications. Comments are added into issues as notes.

If you have any concerns about controlling Spam, we have some options for you to investigate.

One great thing about email reporting is you can now do more when you're out and about. When connecting to your MantisHub from your smart phone, your browser will be directed to the default responsive mobile friendly UI. It's compatible with Android, iPhone and Windows phone platforms.

## Tutorial 5: Stay connected with Chat integration

In the previous tutorial we opened up some great functionality by enabling email reporting. Now we'll open up the communication lines by integrating MantisHub with popular chat applications Slack and HipChat.

MantisHub are always interested in investigating plugins that can extend the out of the box functionality of our service, particularly if you, the customer, have asked for it. But we are picky in selecting plugins. That way we can ensure we maintain the quality service our customers expect.

Slack and HipChat provide a popular chat platform for teams with access from web, mac/windows and mobile phones. They strive to provide teams with a simple and powerful chat experience and collate all relevant information. MantisHub being a core element in managing what a team works on, it made a lot of sense to build the integration.

Slack is a messaging application that groups conversations into channels. These channels could be for a project, a topic or a team and are transparent to all users.

Integrating Slack into MantisHub allows you to assign a channel to a project so all updates to issues within the project are broadcast via the channel. As the notifications are sent out a Slack channel, you can even keep stakeholders across issue updates without having to add them to MantisHub.

If you're not familiar with HipChat head to their website and check it out. It provides a similar service to Slack, allowing you to setup group chats in terms of rooms rather than channels. Integrating HipChat with MantisHub provides similar functionality and communication as Slack.

Not sure which one to choose? You could ask the web. Here's a site to start your research: Slack vs HipChat.

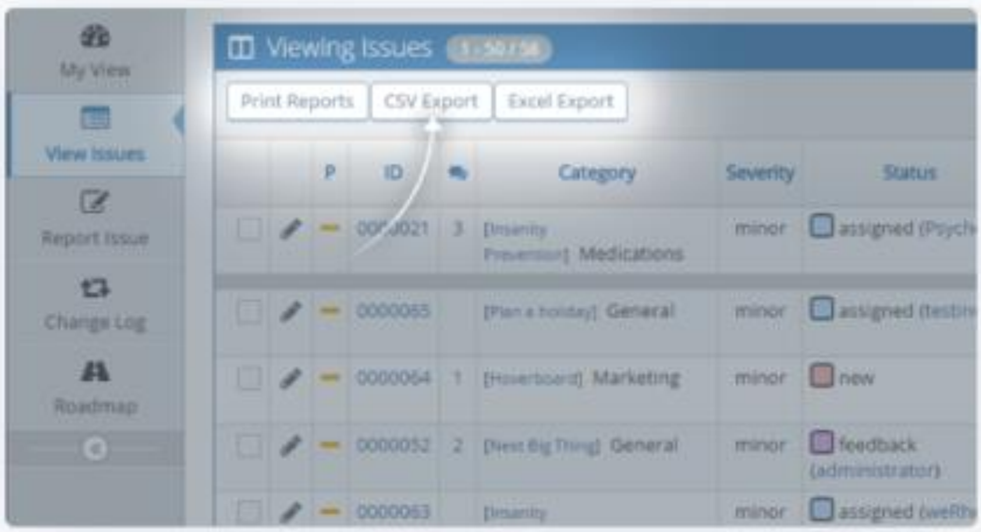
## Tutorial 6: Exporting your Data

In this tutorial, we're going to cover how you can extract the data you need out of MantisHub. There are options to export into CSV/Excel or to print a Word or HTML report. You can also download a full backup of your data.

Back on tutorial 2 we talked about issue filters via your 'View Issues' page. There are a variety of reasons you'll want to group a set of issues. Perhaps you want to filter according to assigned user to report on your team work load. You might want to filter on creation date and severity of issues to see how many major issues were raised for a specific month. Maybe export to excel the list of blocking issues for the next release? Or list the issues fixed in the upcoming release.

However, you wish to collate your data, there's generally a need to export, save or print out the information you've put together.

- Via the 'View Issues' page, you have the option to export your filtered issue list into CSV or Excel.
- You can customize the fields included in your export using column configuration.
- Another option is to directly print reports which can be produced in either a Word or HTML format.



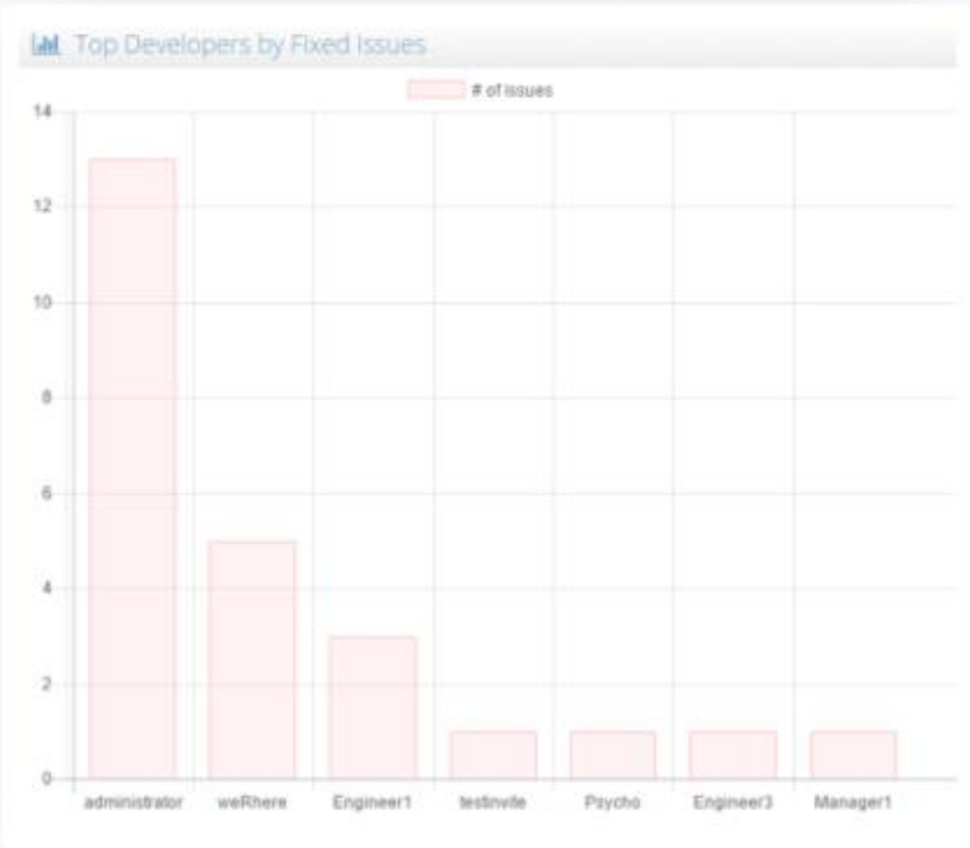

Another way to slice and dice the data is by leveraging the MantisHub API.

Once you become a paying MantisHub customer, you'll never have to worry about lost information as we'll perform regular daily backups. However, for peace of mind, we've allowed you to generate and download your own backup of all your data.

## Tutorial 7: Getting the Big Picture

We looked at printing reports on your issues and exporting your filtered issue lists. However, sometime managers want the big picture. They want the numbers. How many assigned and unassigned issues do we have in a project? How long have our issues been opened? How many unresolved issues are my team member still working on?

All these statistics are available via the ‘Summary’ page. It will show your issue numbers grouped into status, severity and category. You can see how long issues have been open, the most active issues and much more. Go ahead and check it out.
If you need some pretty pictures to go with the numbers you can install the ‘Graphs’ plugin via the ‘Manage’ page and ‘Manage Plugins’ tab. Just click the ‘Install’ button.

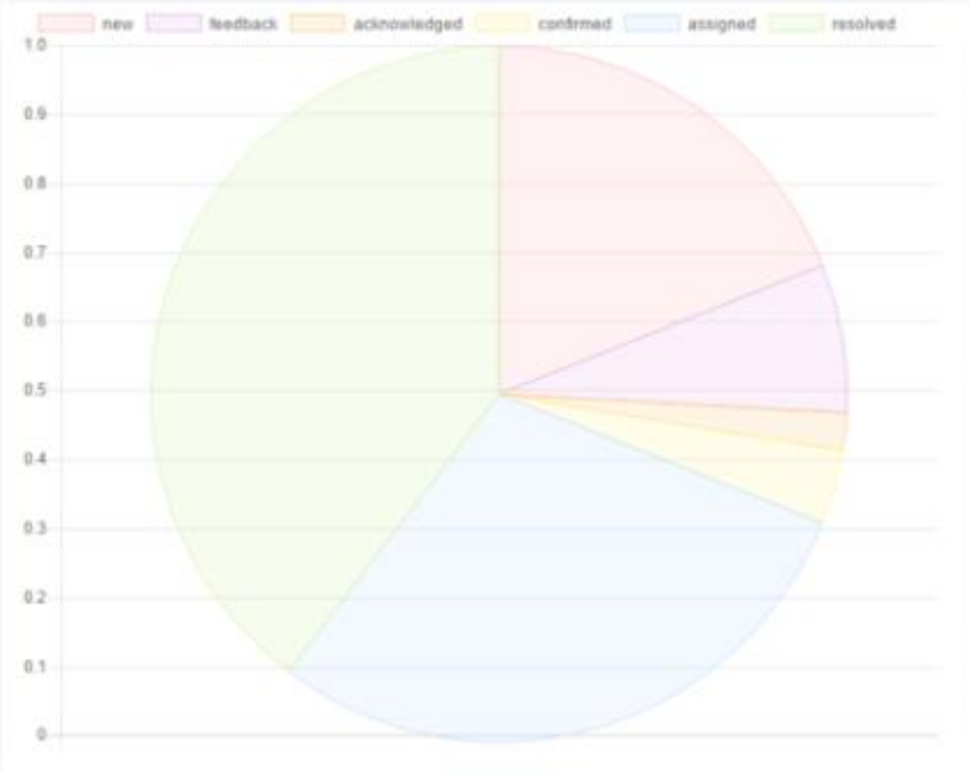



Once you've installed the graphs plugin and gone back to your ‘Summary’ page, you’ll see there are several tabs available which will graph statistics according to:

1. Developer,
2. Reporter,
3. Status,
4. Priority,
5. Severity,
6. Category and

7. Resolution

These statistics are displayed in a bar graph, comparing total numbers, and a pie graph showing percentages which are great to copy into your business reports.




Display any MantisHub stats across all projects or restrict the results to a single project using the project selector at the top of your screen.

## Tutorial 8: Go live!

We're nearing the end of your guide. We've covered a lot of what you need to know working day to day with your MantisHub and we hope you've seen enough of MantisHubs simple and intuitive interface as well as the ton of added feature we offer and perhaps you're ready to sign up with us! We make it really easy to get setup in a matter of minutes.

Here's the easy 3 step process for you to join the mantisHub community.

1. Decide on a package
2. Add payment details
3. At the end of your trial period, your subscription will automatically convert to paid.

Let's go through it.

To consider which plan best fits your requirements, check out our pricing and packaging options. These will primarily vary in terms of user accounts and data storage space.

Once you've selected a package, all you need to do is log into your billing interface and add a payment method. We accept all major credit cards and payment will be taken at the end of your trial period. Once you're converted over we'll start backing up your data on a daily basis.

For customers who have data to import, we can migrate data from MantisBT or you can use our self-service CSV import feature.

## Tutorial 9: Tailor it to YOUR needs

Hopefully you've decided to come on board with MantisHub by now.

Want to know more? We'll cover some customization options available to you.

Perhaps you want to tweak a few things in your issue tracking service? MantisHub is totally on-board with that! Investigate the wide variety of customization options for paying customers. These include adjusting issue status and severity values or adding new fields and hiding others.

You can manage the columns that are displayed in your different views and don't forget adding your company name and logo which we covered back on tutorial1.

We have users in over 150 countries across the world. So it's pretty handy that you can change the default language and time zone. We support over 60 different languages so chances are, we've got you covered.

Administrators can configure a huge range of features and options. Want to tailor access to time tracking reporting? Maybe you want to adjust due date thresholds? Or set the default view status for projects to private and set a new default category?

And if there is anything we haven't thought of, you can just email the support team and we'll help you get the customization you need.

Don’t forget our variety of plugins which we are constantly expanding on or the MantisHub API which opens up even more options for you.

## Tutorial 10: Engage your Customers

On our last tutorial, let's recap. You have now learnt how to:

- Setup your projects and categories,
- Report issues and all about the issue lifecycle,
- Create Changelogs and Roadmaps to organize your issues.
- Manage your users and get everyone talking with Chat integrations
- Exporting data and analytics.
- Get mobile with email reporting and our Mobile friendly interface.
- Customize your MantisHub and everything you need to sign up and become a paying customer.

Lastly, we'll cover options for engaging your customers. You may wish to provide access to your Issues tracking service to customers to report and view issues. You'll probably need to setup these accounts so these users can only access the issues that they have reported.

As you open up MantisHub for customers, it is recommended to create a test reporter account to verify that such users can only see projects that you expect them to see. For example, there may be a project that you intended to be private, but is marked as public.

Don't forget you have the option to use MantisHub HelpDesk if this is suited to how you want your customers to interact with you.

The above options have you manually creating accounts for your customers. In some cases such as open source software, you may want to enable customer sign up and automatically generate REPORTER accounts. There is also an option to enable anonymous access to allow read-only access to issues even before signup. Of course we have a way for you to block suspect accounts to avoid spam.

Well, that’s it for our email tutorials! We hope you’ve benefited from it and you may want to keep these emails to refer back to from time to time. As always you can reply to this email or email us with any questions or feedback you might have.

Once again, thank you for giving MantisHub a go. We know that the market has many options for you so we appreciate you taking the time to sign up and learn all about our service.

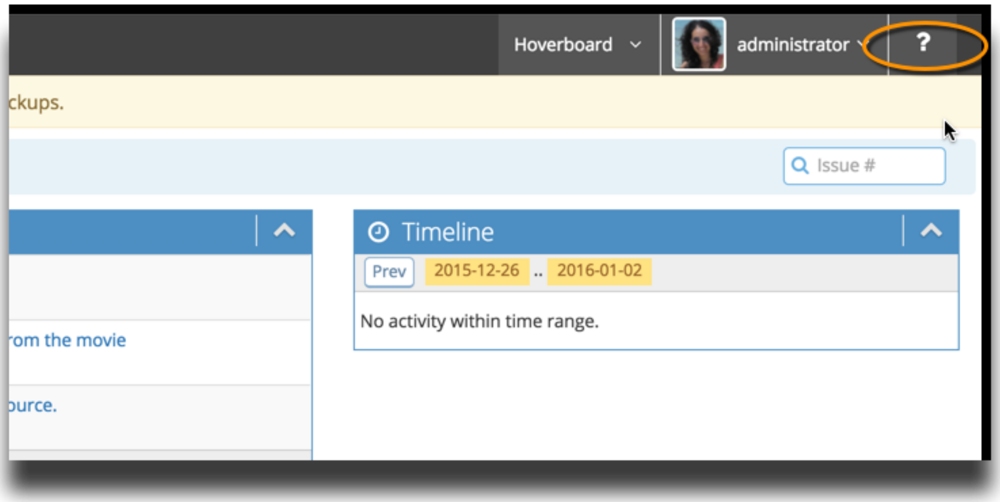
## How to Contact Us

If you have any questions using MantisHub or if you want some more information, MantisHub has several facilities set up for you to tap into.

We have a friendly and helpful support team waiting to answer your queries. We love when you reach out to us, so don't be shy!

You can contact us by emailing support -at- mantishub.com.
When you contact us, be sure to include your MantisHub URL name and to avoid confusion keep different issues or topics in separate email threads.

You may want to check our Knowledge Base first to see if the answer is immediately available. You can access it via the **?** button in your MantisHub or directly browse to suppport.mantishub.com.




**Other Sources of Help**

Feel free to contact the support team with any questions you have but we may already have the answers for you in our Knowledge Base articles, video tutorials or on our blog.

**SLA**

We aim to get back to you within 48 hrs.
For customizations, expect a turn-around of up to 3 days.
Migrations can be scheduled with 2 weeks' notice and are done over a weekend.

**Keep up to date**

You can follow us on our blog, twitter, google+ and tumblr as we're constantly posting news, tips and tricks.

And please don't forget to provide feedback for us. We think we're pretty good ;) but we're always looking to be better.

Looking forward to talking with you!