

Roundup: A Web-based Issue Tracker for Project Coordination

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Introduction

So, you're hoping that awesome Halloween costume you bought on eBay will arrive in time for the party. The package is sent and you've got a tracking number! If it doesn't show up when expected you can find out where it is! That's cool. And comforting. And *useful*.

If you like tracking stuff, you're going to want to know more about **Roundup**, a web-based issue tracker with tight email integration and robust reporting. It's also easily modified for specific needs and it's open source.

This poster outlines the use of the **Roundup Issue Tracker** by the data warehouse folks.

An issue can be nearly anything – an idea you don't want to forget, a problem that needs to be addressed, a reminder to ask someone else to address a problem. Let's go over the steps to create an issue.

Creating a New Issue

- **Title** is obvious. Don't worry about getting it exactly right – you can change the title anytime (the tracker will track title changes of course).
- **Priority** is required and allows the tracker to organize the issues. We use "critical", "urgent", "important", "bug", "feature", and "wish". These can be easily tailored to your needs.
- **Status** lets us move the issue along, from start to finish. An issue might start as "in progress" and move to "testing" and finally "resolved".
- **Assigned to** lets us assign the issue to a team member.
- The **nosy list** lets us add users to an issue. If your name is in the nosy list for an issue, you will receive an email whenever the issues is updated.
- **Superseder, Category, and Keywords** help organize issues.
- **Change note** is the primary editing area for the issue.
- **File** allows you to attach a file to the issue.

Editing an Issue

Here's an issue being edited. Note that four files have been attached to this issue – two spreadsheets, a Visio drawing, and some SAS code. Each change note is preserved in chronological order. The author and the date/time of each update is also available. The attachments and the chronological order should remind you of an Outlook email discussion. The nice thing about this is that it is available to anyone with access to the tracker. You don't have to forward an email and remember to include the attachments.

Sounds good... what's the catch?

There are problems with the issue tracker. First, email and web access to the tracker is limited to GH only. This is true of any intranet application.

Second, Outlook is a "top post" email application by default. When you reply to an email, your note is inserted at the top and everything else is below. Because Roundup is keeping up with the history, you really don't need the email history. But, it goes in anyway, and you get a lot of redundant text in the tracker. Roundup attempts to strip this history out, but Outlook is stubborn and I haven't figured out how to fix this.

Finally, this is something of a pilot project. Roundup is not supported by central IT so if it blows up, you're on your own.

Summary

An issue tracker is a good way to keep your team focused on what's important. Supervisors can monitor progress and easily set priorities. It serves as a nice documentation repository that is available to the team and not locked up in someone's email program. Just like tracking a package, you can track issues with Roundup's issue numbers. (for example, <http://mpe0nr/ghridw/issues/issue62> is a permanent link to an issue about MRI codes).

If you would like to test drive Roundup for your project, let me know and I'll setup a demo for you.

Reporting and Searching

Roundup provides a rich query interface. Here is an example of urgent issues that are unresolved and over one week old. Queries can be defined, saved, and shared with other users in the system.

Want to export some data for reporting in Excel? No problem. Just use the Download as CSV feature.

Auditing

Roundup keeps a complete history of changes to the issue. Here is an example of the audit log that appears at the bottom of each issue.

Email Integration

Here's a cool trick – Roundup understands email. Suppose you get an email that you want to track. You can forward the email, including attachments, to Roundup's email address. The Roundup server checks for email every few minutes and when it finds a new issue, it is added to the tracker. Oh, and if it's an existing issue, it does the right thing.

And when you think it can't get any more cool, you can give commands to Roundup via email. Here is an example of a bug report that I wanted to track. I forwarded the email to the tracker, assigned the issue to myself, added Roy to the nosy list (so he'll receive an email notice of the new issue), and set the priority to "bug".

If a user receives an email from the tracker via the nosy list, he or she can reply normally. The tracker will keep up with the conversation.

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