Case Comp

Features Documentation

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Overview

Casecamp is a web-based project management tool that allows users to collaborate and manage projects from start to finish. It includes features such as task management, time tracking, file sharing, and team communication. Casecamp is designed to be user-friendly and easy to use, making it a popular choice for small businesses and teams.

In addition to its basic project management features, Casecamp also includes support for agile estimation techniques, such as the Fibonacci series method. This allows teams to estimate the relative size and complexity of tasks and cases, and to prioritize them accordingly. Casecamp also allows users to prioritize tasks and cases, making it easier to focus on the most important items. This includes the ability to assign priority levels to tasks and cases, as well as the ability to filter and view tasks and cases by priority.

The tool also provides an internal commenting system, allowing team members to easily discuss and collaborate on tasks and cases within the platform. Additionally, Casecamp supports external comments, allowing clients or other stakeholders to provide feedback and input on projects. This improves the collaboration and communication among the team members, clients and stakeholders.

Overall, Casecamp is a robust project management tool that offers a wide range of features to help teams stay organized and on track, including support for agile estimation techniques like Fibonacci series method, priority cases, internal and external comments, making it an ideal tool for teams of all sizes.

1. Introduction

1.1 Purpose:
This document will prove as a baseline for greater understanding of the features we have in Casecamp. This document will be provided to every new employee as a support document to study and refer as required

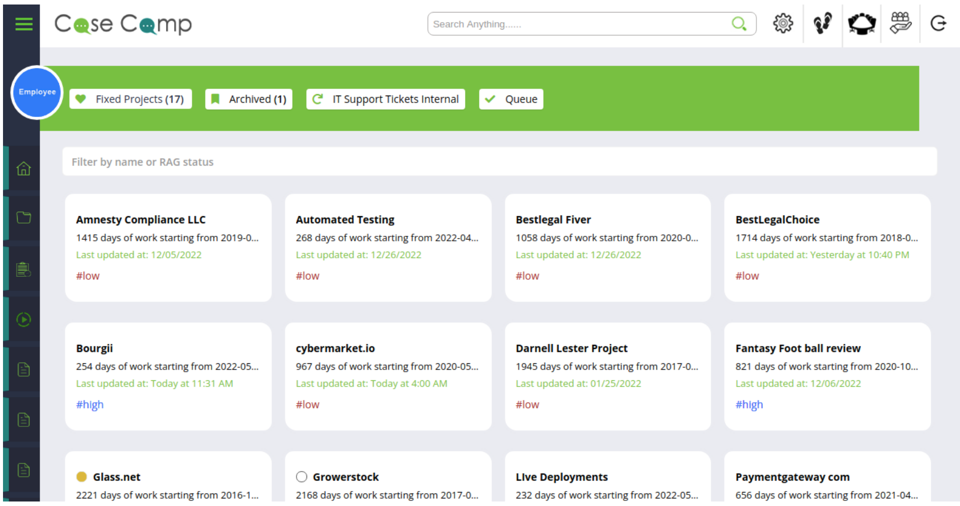
1.2 Scope:
Every feature offered is covered with relevant description and aided with images and videos for greater understanding.

1.3 Responsibilities: List who is responsible for complying with this procedure here. Identify all personnel (internal as well as external) that are responsible for executing the procedure.

1.4 Chief/Principal Investigator: Rajesh Rajaram

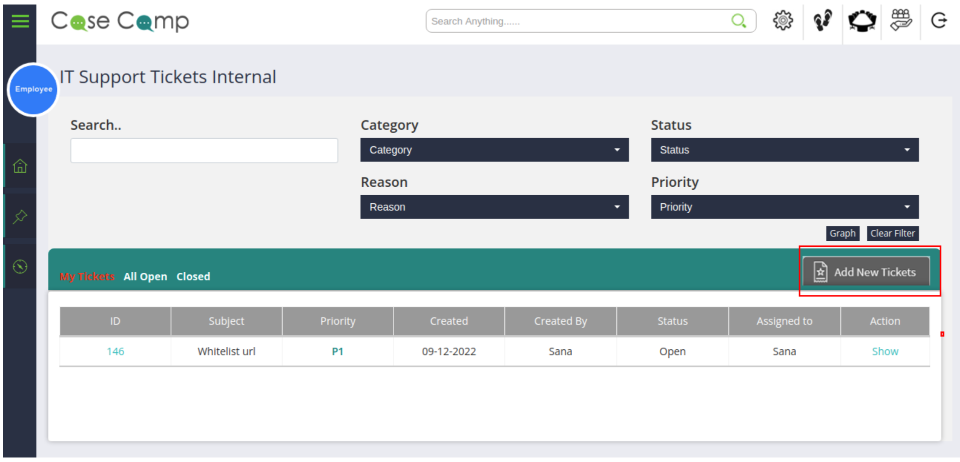
2.Dashboard

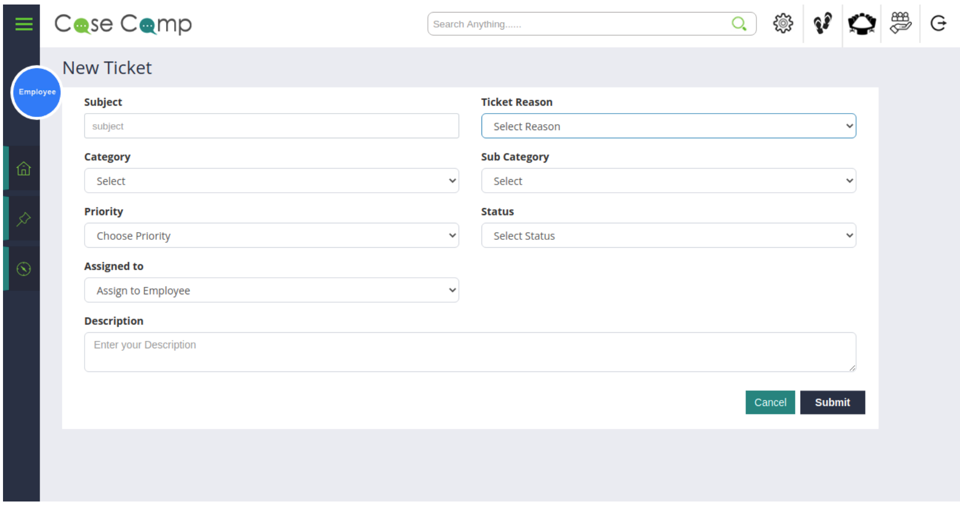
- When the user logs in, they'll get redirected to the dashboard page.
- It contains list of active projects to which user have access.



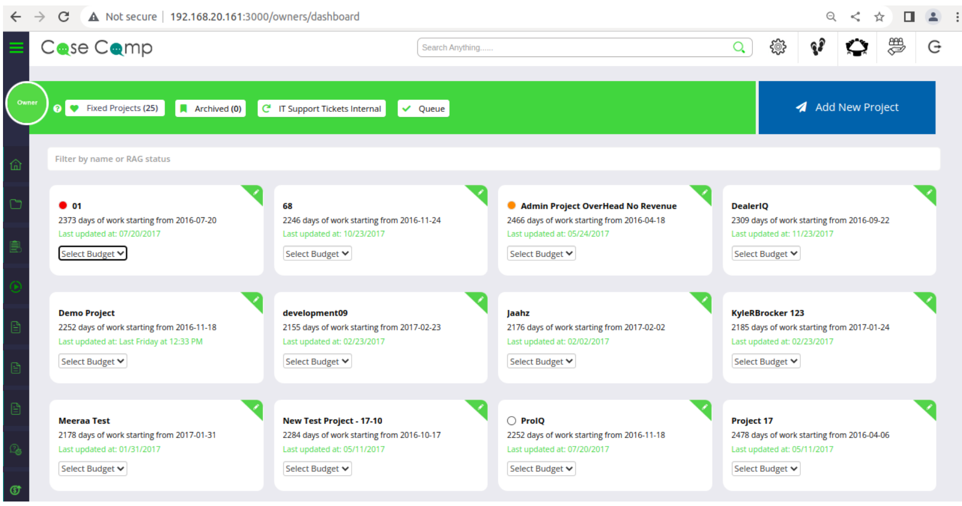
- Dashboard contains list of tabs named Fixed projects, Archived, IT support tickets internal and Queue.

1) **Fixed Projects:** It contains list of active projects.
2) **Archived Projects:** It contains list of inactive projects or the projects that are closed.
3) **IT support tickets:** If any hardware or software related issues, we can make use of this to create a ticket and the respective team will solve the issue.
4) **Queue:** It includes unassigned cases.





- Apart from these features, if the user is an owner, they can create new projects.



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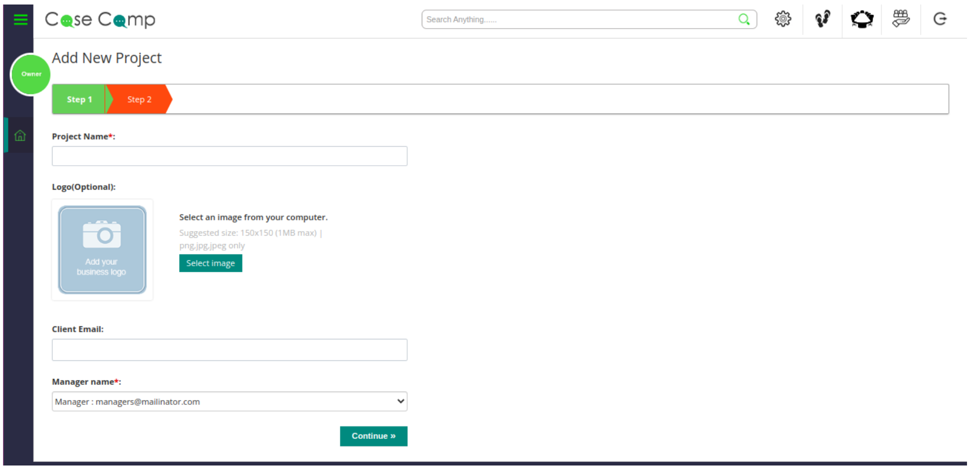
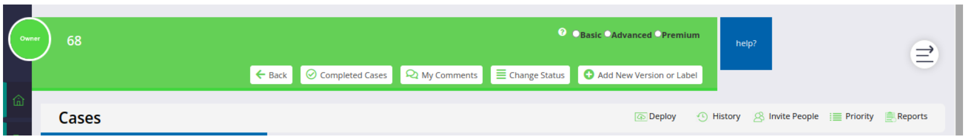


3.Project Cases

Owner/Manager can create new version, label of the project case and they can change the status of the project.



Owner/Manager can invite new user to the project by clicking on "Invite People".

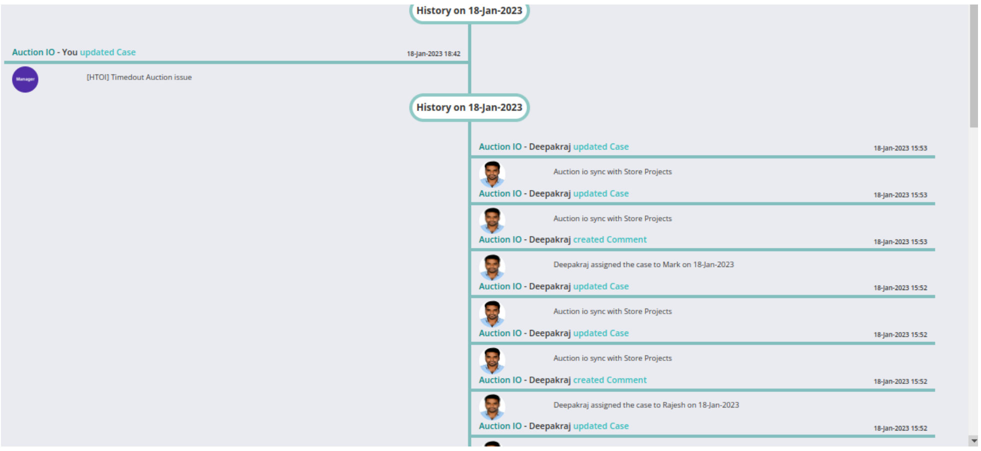
3.1.Support Care

Casecamp provides its customers with three types of Support Care (or maintenance support) options. Basic, Advanced, and Premium. Only owner will be having access for this. The response times are mentioned below for each once,

- Premium - Response time is 30 mins.
- Advanced - Response time is 1 hour.
- Basic – Response time is 6 hours.

3.2.History

The history of the created cases and the recent changes related to that cases can be viewed if we click on history.

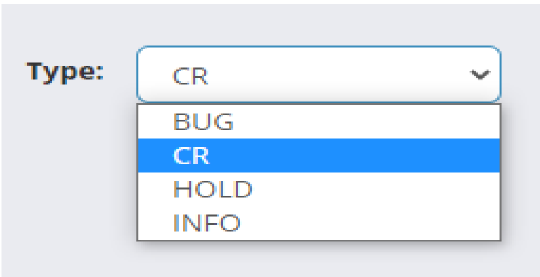


3.3.Creating New Case

Any authorized user can create the new case within the project. To create a new case, follow these steps:

1) Click on the New Case button, see below:

2) Then Select Case Type as either CR(Change Request) or Bug or Hold or Info.



3) Complete all the required fields, along with fields for which you have additional information. Once completed, click on “Add”. Case Title, Due Date, Set Priority, Fibonacci Weightage and Assigned to fields are required fields.
4) Priority and Weightage classification can be listed when hovering over the respective icon next to the label.

Urgent: Website completely down/offline, Security errors, Payments not transacting,Form not submitting or any issue that affects site completely. Team response time is 1-3 business hours.

P1: Chronic issues, Notification errors, Page load times, or any issue that is hindering site performance. Team Response Time is 24 hours.

P2:SEO Meta Tag issues, or any issue that requires non-critical resolve. Team Response Time is 2-4 business days.

P3: Design issues, Textual changes, or issues that are aesthetic in nature and require no to minimum coding. Team Response Time is 5 business days.

P4: Module edits or new features that do not require a stringent timeline. Team Response Time is Tentative.

0 - No effort: No effort is required to complete the tasks.

1 - Extra small: The teams understand all the requirements and consider it relatively easy, probably the smallest item in the sprint and most likely to be completed in a day.

2 - Small: The teams have worked on this a lot, only a little bit of thought, effort or problem – solving is required.

3 - Average: The teams have done this a lot, knows what needs to be done, but a few extra steps are required to complete it.

5 - Large: This is complex work, and one of the largest items that can be completed within a sprint.

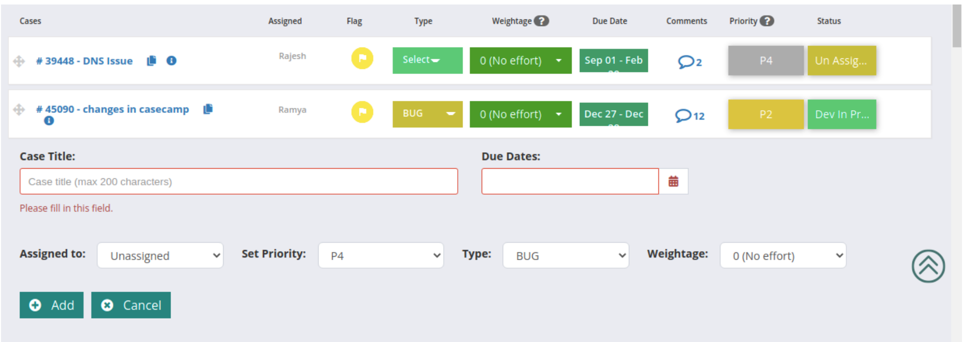
8 - Extra large: This is going to take some time and research and probably more that on person to complete this within two weeks.

13 - Warning: This is a complex piece of work with a lot of unknown and requires multiple assumptions to size. This cannot be completed within one sprint. Needs to broken down and completed independently.

21 - Hazard: This reflects too much complexity to be done within on sprint. It needs to be more refined.

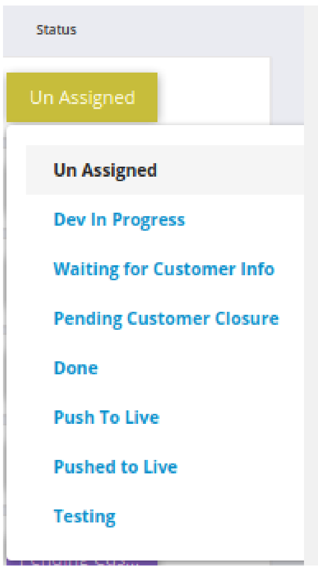
34 - Danger: Work cannot be done in the way it is currently written. It is very complex and cannot be completed in time frame of an iteration or sprint.

5) Prior to submitting, make sure the “Assigned to” is chosen. This will ensure the case is created and assigned to the respective user.

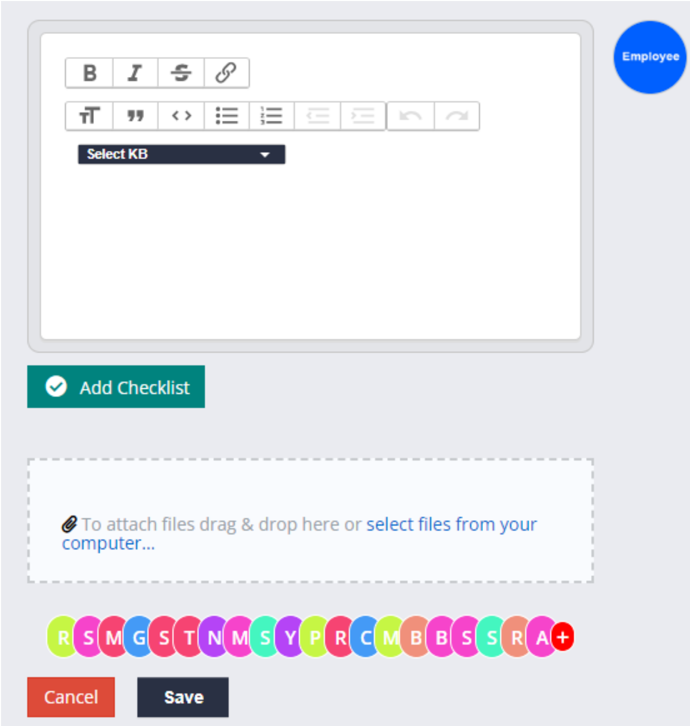


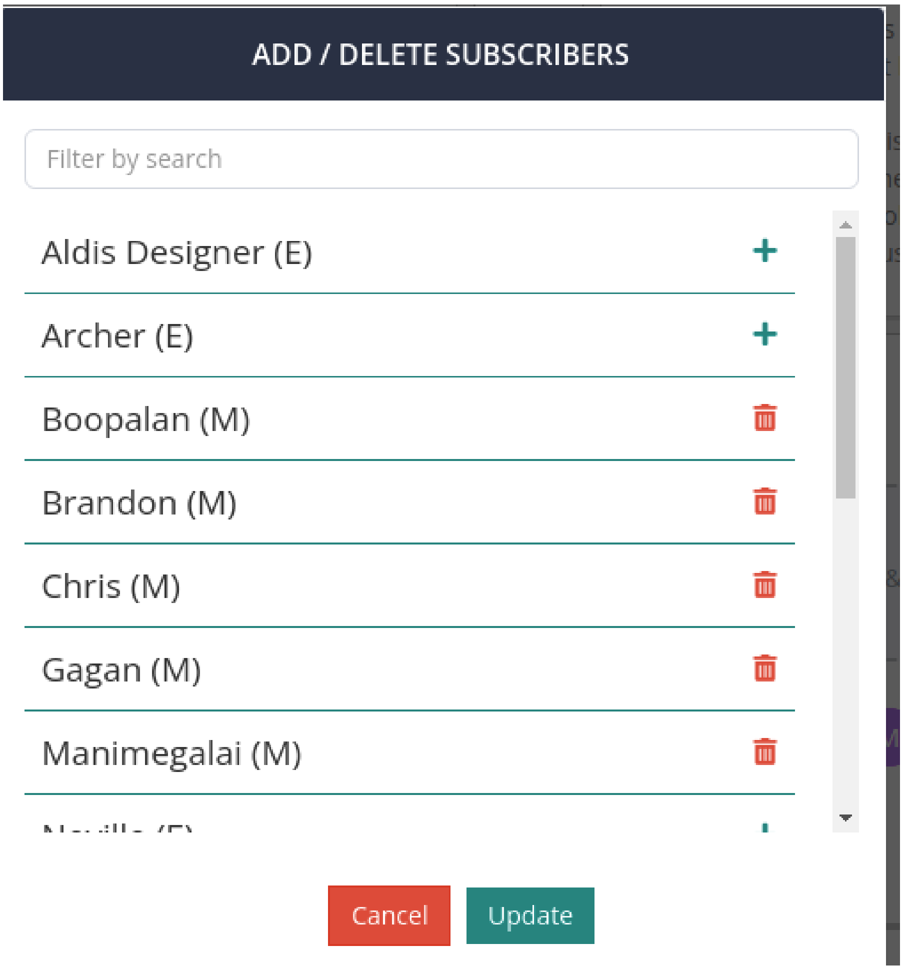
6) This will generate a new case number, and is ready for review and processing. So now the new case is created.

7) Once the case is created, it’ll be assigned to the respective person. User can change the status of the case.



8) Now inside the case need to add a detailed description of the Case, Files or Images or recordings, Add/ Delete Subscribers. This will also send the case details to the respective added subscribers via email, including the case number.


Employee
Select KB
Add Checklist
To attach files drag & drop here or select files from your computer...
R S M G S T N M S Y P R C M B B S S R A
Cancel
Save


ADD / DELETE SUBSCRIBERS
Filter by search
Aldis Designer (E)
Archer (E)
Boopalan (M)
Brandon (M)
Chris (M)
Gagan (M)
Manimegalai (M)
Cancel
Update

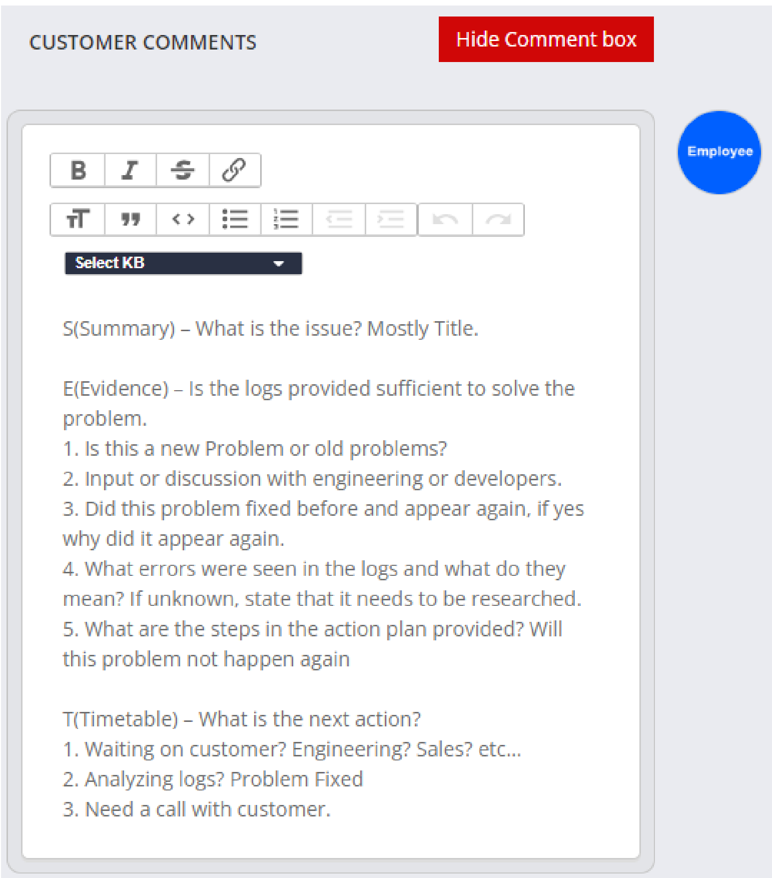
3.4.Comments

We are having 2 types of comments:

- Customer Comments / External Comments
- Internal comments

3.4.1.Customer Comments / External Comments

Make sure to use the SET (Summary, Evidence, and Timetable) format for case comments, at all major milestones. Customer will be commenting on the right side.



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3.4.2.Internal Comments

Internal comments are used for communication within Teams / departments or with individuals within the project members.

3.5.Flags

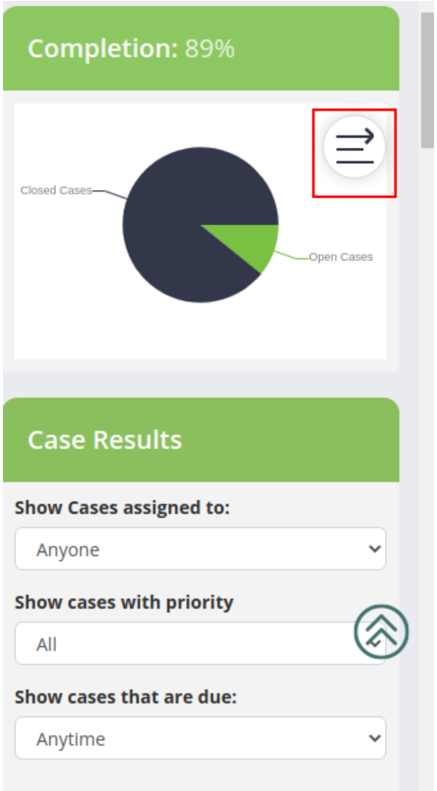
Each Case (CR, Bug) has 4 types of flag status. Based on case progress the flag status will be differed. Which are mentioned below,

- **Gray flag** – by default the Case will be in “No Flag”.
- **Yellow flag** – SLA Missed
- **Red flag** – Escalated
- **Blue flag** – Root cause analysis (RCA)

Owner/Manager will be having the access for hiding external comments for customer and they can move the internal comments to external as well.

3.6.Project Status

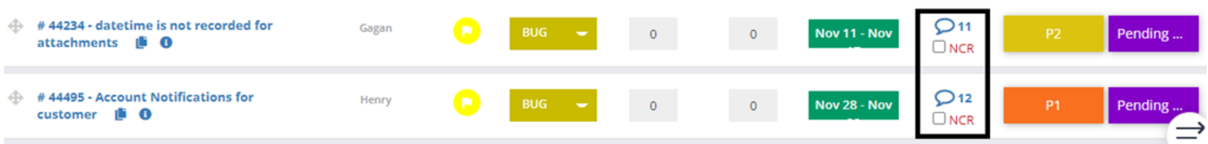
Project completion status will be displayed in a bar chart when we click on the arrow icon next to help. Which also contains Case results filter and Latest updates on each case.



3.7.NCR

No Customer Response – Which means when the Case is comes to “Pending from customer closure” then “NCR” option will be available in the Cases page. If we have not received any response from client for another 2 weeks then we can follow the NCR Process. We can raise NCR twice.

Once the NCR process is started then for the next 2 weeks auto-generated comment is posted in the Customer /External comments section. Then still if not received any updates from the client /customer then the respective case is Auto-Closed.



3.8.Calendar

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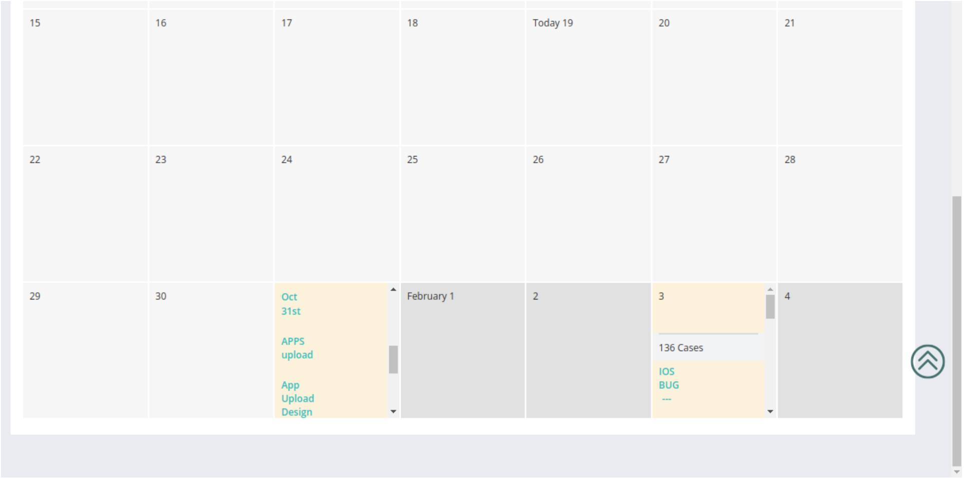
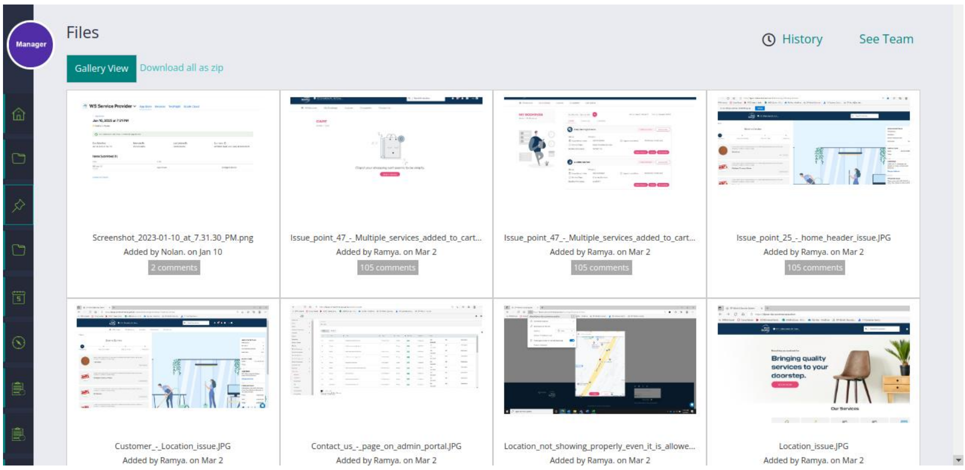
Any authorized user has the access for calendar. Here list of all the cases will be present



3.9.Files

When user click on files in the sidebar, they can find all the list of files attached against the cases. User can download it as a zip as well. By default it'll be shown in Gallery view. We can see the history of recent changes, if we click on "History" label.



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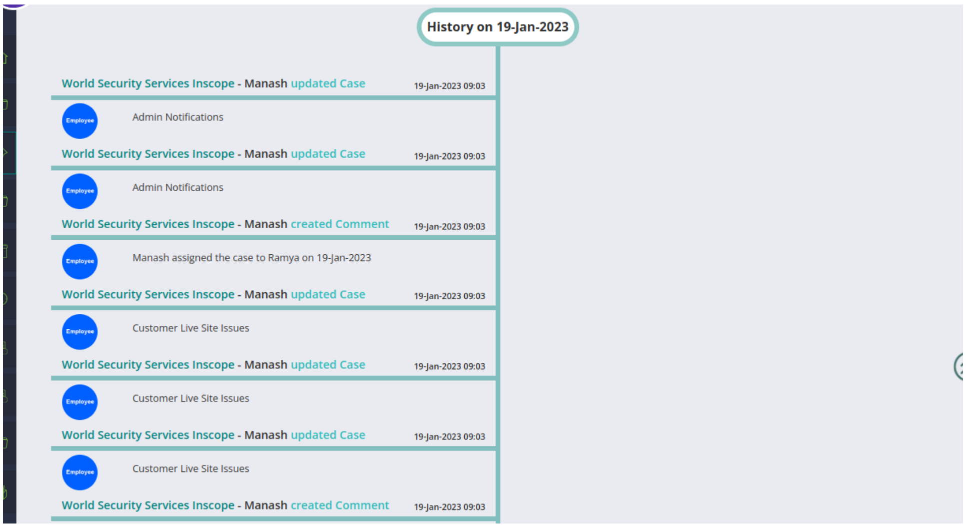
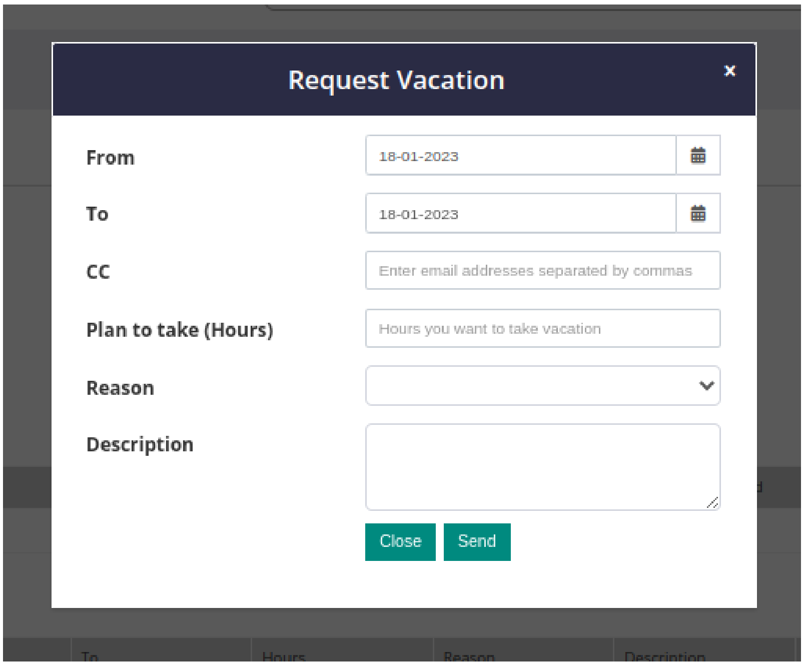


4.Vacation / Late Work Log

4.1.Vacation Request

User can request for vacation by clicking on the sandal's icon in the header. Vacation request status will be displayed on the table.



Owner/Manager can approve or reject the leave vacation of the employee.

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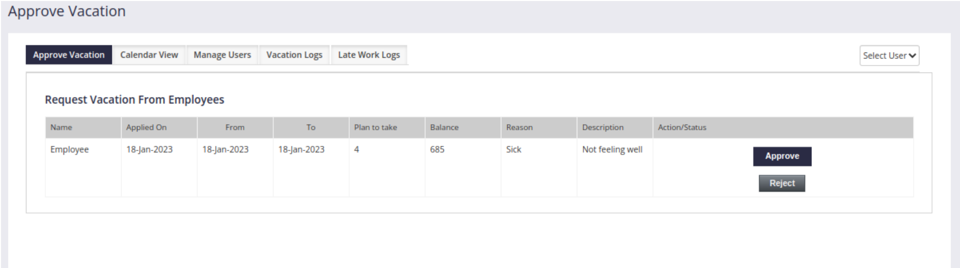
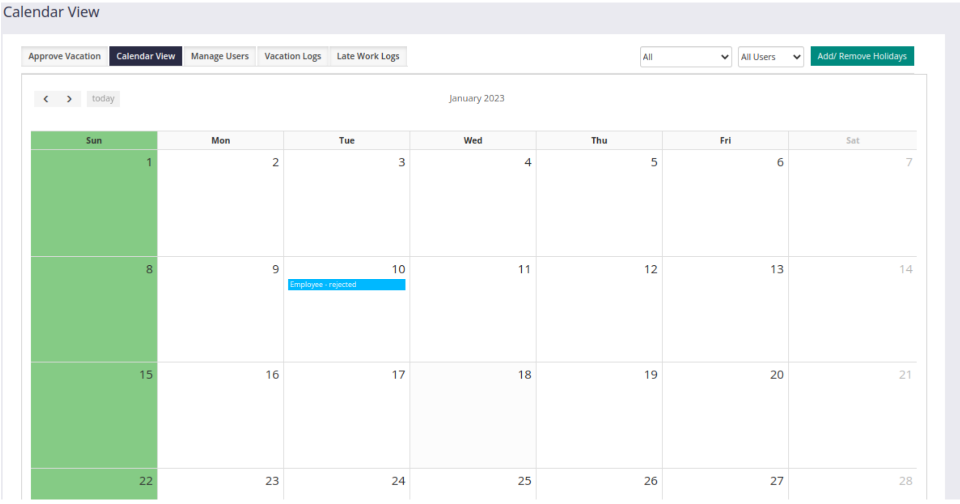
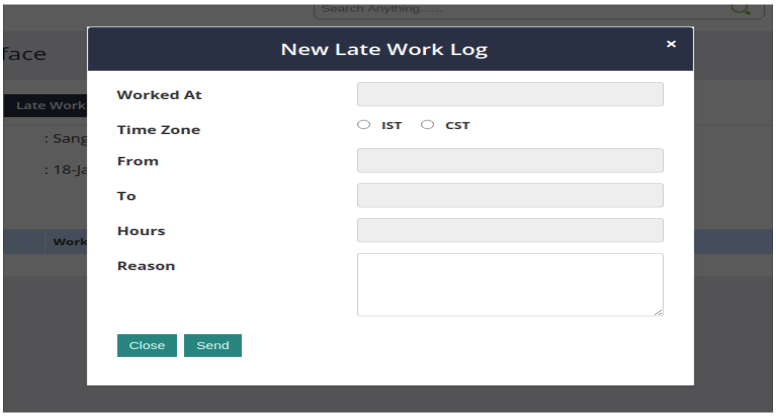




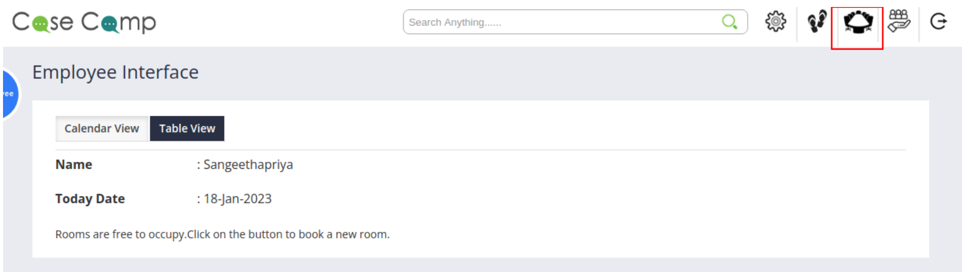
4.2.Late work logs

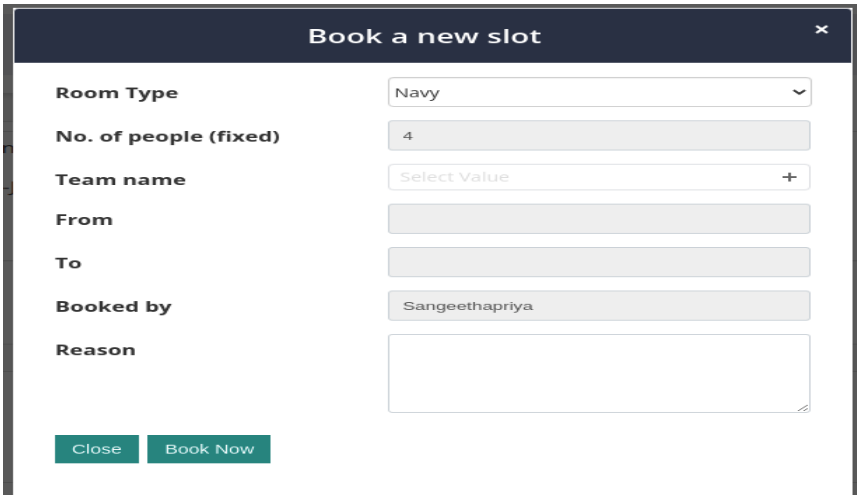
User can create new late work log, if they work extra time or beyond the estimated time of the case.



5.Internal Room Bookings

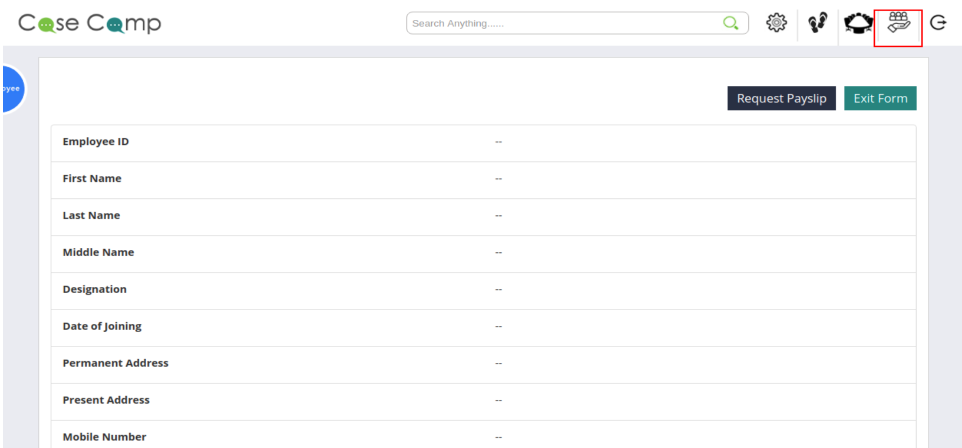
Availability of conference rooms can be easily known by this. Before making use of the conference rooms, the user need to book the room based on the availability by clicking on the conference meeting icon.

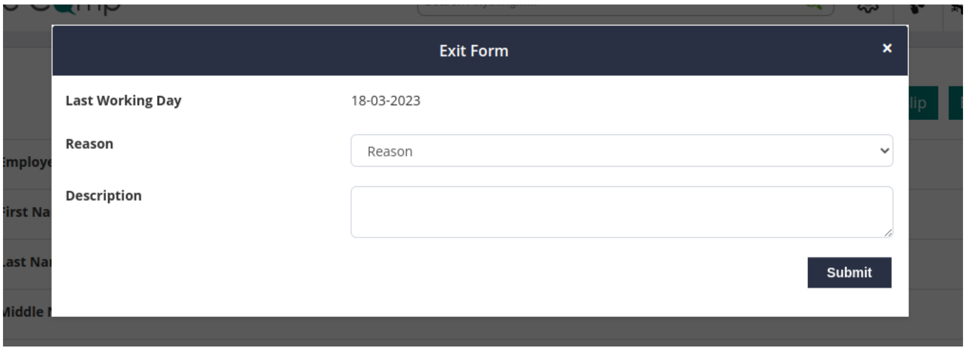




6.HR Activity

Payslip, exit form can be requested here. Employee profile details are also available here.



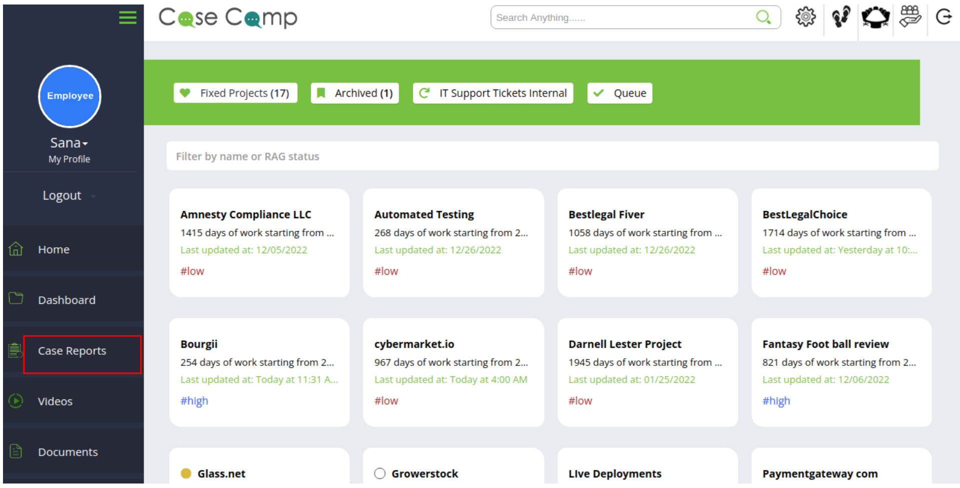


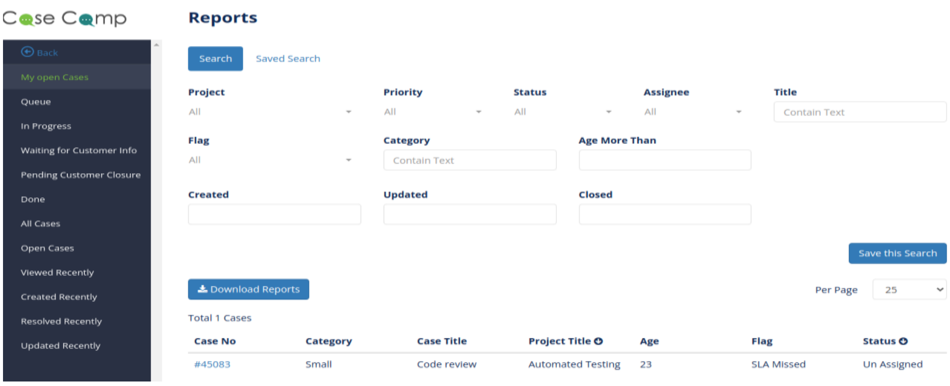
Managers/Owners will have the access for managing the exit clearance.

Employee Full Name	Employee ID	Last Working Date	Clearance Status	Action
No Results				

7.Case Reports

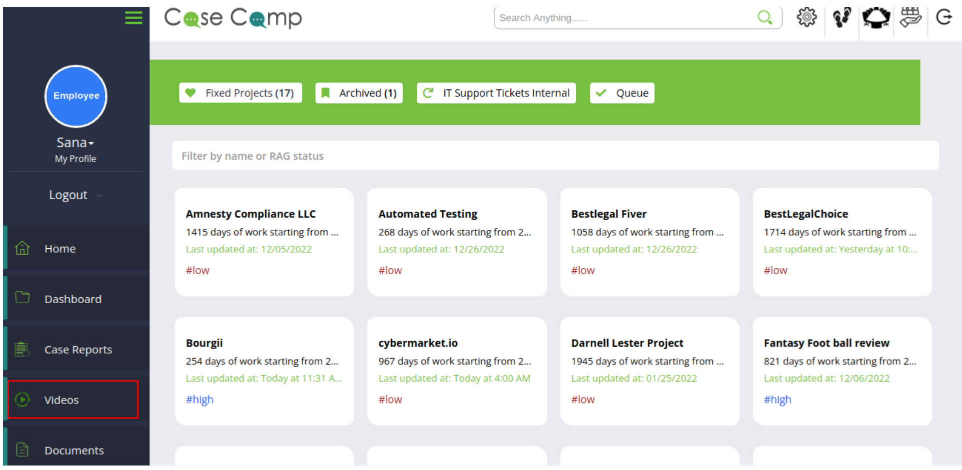
When the user clicks on the case report in the side bar, it'll get redirected to the report generation page. The report can be generated in the form of excel based on the filters selected by the user.

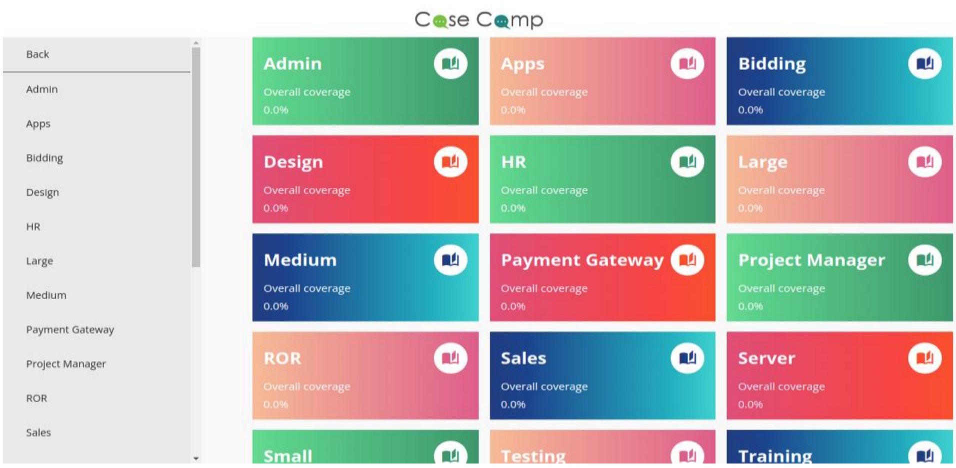




8.Learning Management System

When the user clicks on the video icon in the sidebar, it'll get redirected to the list of videos page. Here we can find all the learning videos related to the Company.





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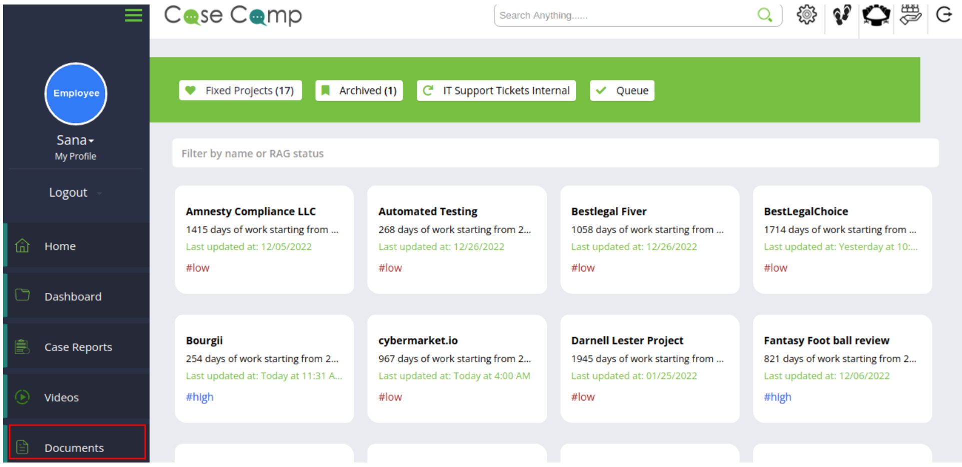
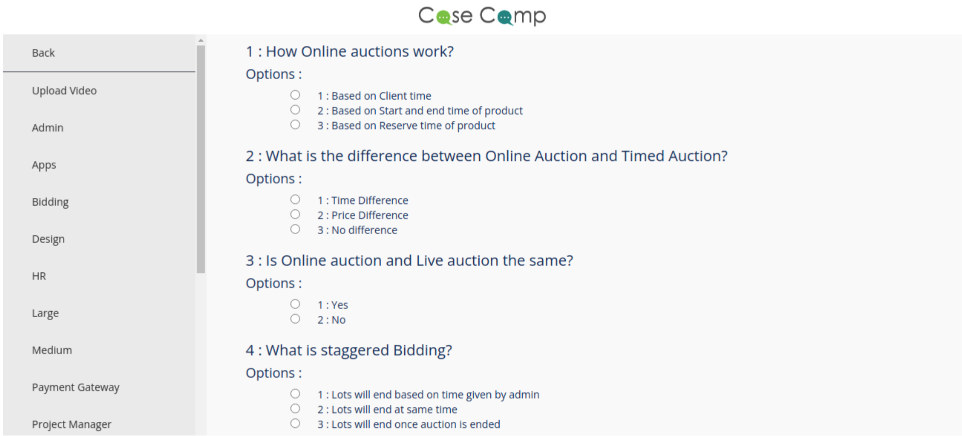
9.Documents

User can find SET(Symptom-Evidence-Timeline) Documents or videos related to the company when they click on Documents in the sidebar.



10.Test or Quiz

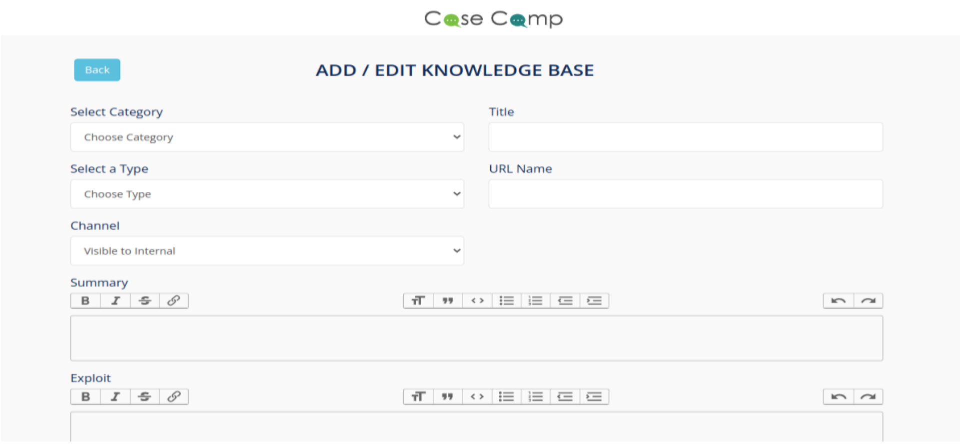
User should take the assessment by clicking on the Test or Quiz label from the side bar after the documents are referred.



11.Knowledge Base

Inside the knowledge base the user can create new KB, which is nothing but the detailed information.

Here user can attach any type of documents for the reference.



Owner/Manager will be the approving/rejecting the KB's. The KB's can be edited by the user as well.

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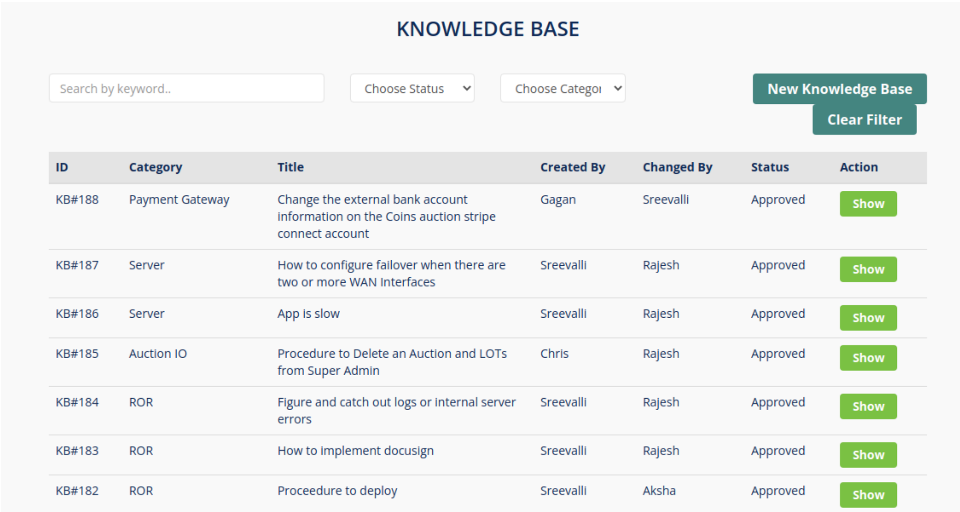


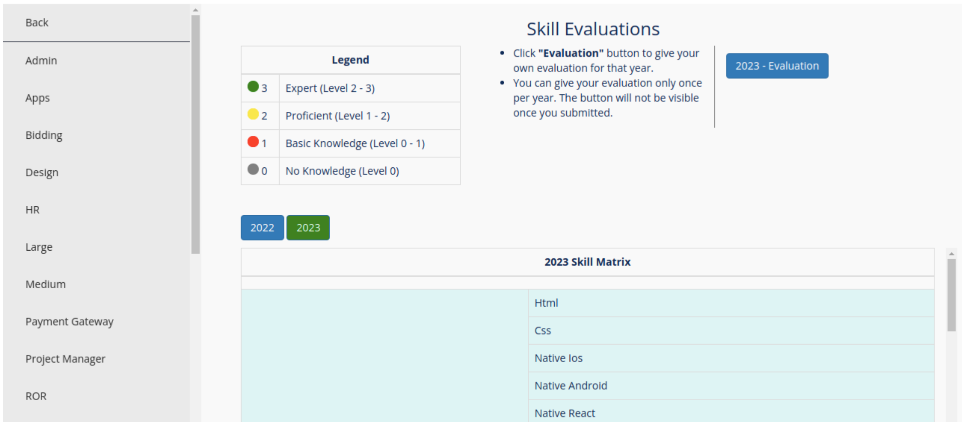
KNOWLEDGE BASE

Search by keyword.. | Choose Status | Choose Categoi | New Knowledge Base | Clear Filter

ID	Category	Title	Created By	Changed By	Status	Action
KB#188	Payment Gateway	Change the external bank account information on the Coins auction stripe connect account	Gagan	Sreevalli	Approved	Show
KB#187	Server	How to configure failover when there are two or more WAN Interfaces	Sreevalli	Rajesh	Approved	Show
KB#186	Server	App is slow	Sreevalli	Rajesh	Approved	Show
KB#185	Auction IO	Procedure to Delete an Auction and LOTs from Super Admin	Chris	Rajesh	Approved	Show
KB#184	ROR	Figure and catch out logs or internal server errors	Sreevalli	Rajesh	Approved	Show
KB#183	ROR	How to implement docusign	Sreevalli	Rajesh	Approved	Show
KB#182	ROR	Proceedure to deploy	Sreevalli	Aksha	Approved	Show

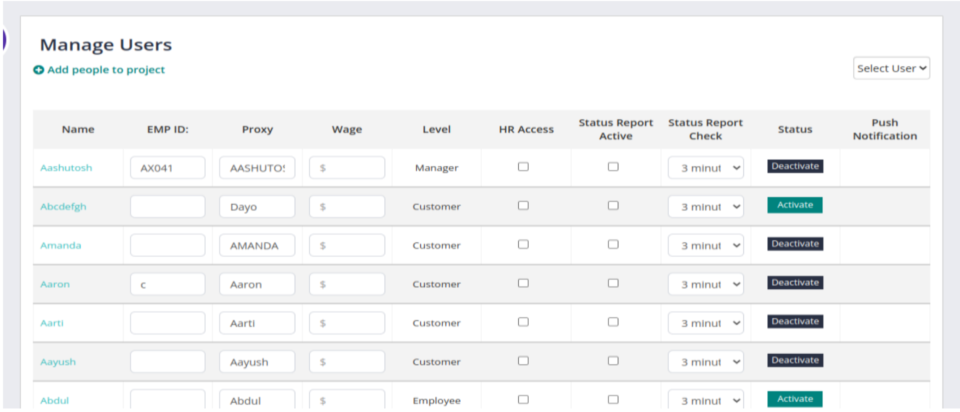
12.Skill Evaluation

User can Evaluate their skills in the skill evaluation section. Proficiency varies from 0 to 3.



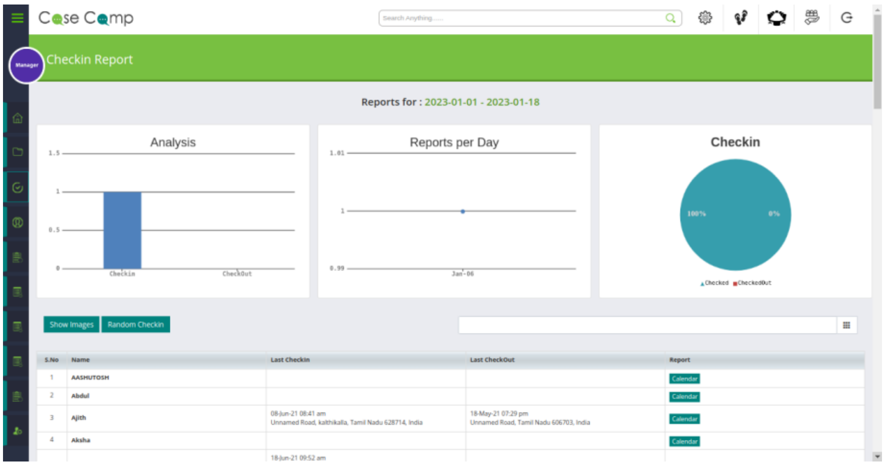
13. Managing Users

Managers/Owners will have the access for managing all the list of users. From here the new user also can be added to the project, activating or deactivating user account(only owner can do this), sending notification to the user can be done here.



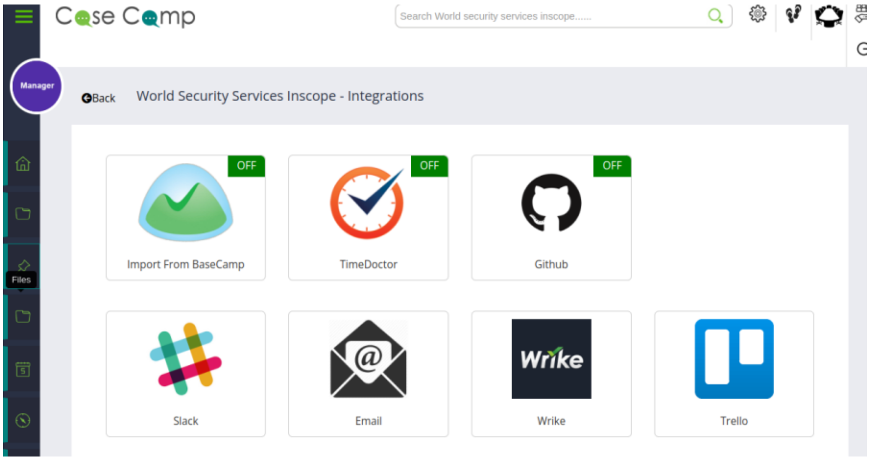
14. Check-in/Checkout

Employees check in and check out report can be generated and it can be managed by the manager/owner.



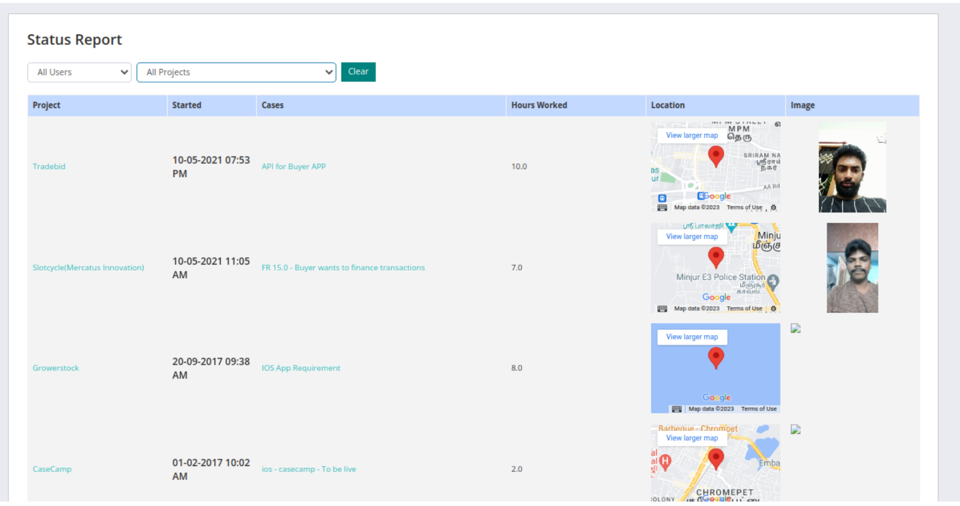
15. Integrations

We can integrate slack, GitHub, call list of all the employees, location, Basecamp, Time Doctor, Wrike, Email, Trello. When we click on integrations, we can find list of all these in that page.



16. Case Status Report

Manager/Owner can see the time spent on each case by the employee when they click on status report label in the side bar.



17. Case Group By

- Improved organization: Grouping tasks by specific criteria helps users to organize their data more effectively.
- Better visibility: Grouping tasks makes it easier to see patterns and trends in data, which can be helpful in identifying areas that require attention or improvement.
- Time-saving: Grouping tasks can save time by allowing users to quickly filter and sort data, rather than manually searching through large amounts of data.

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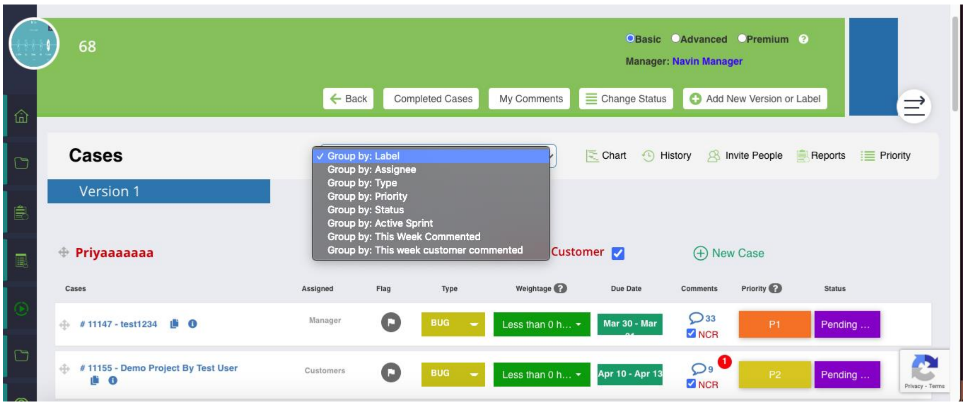
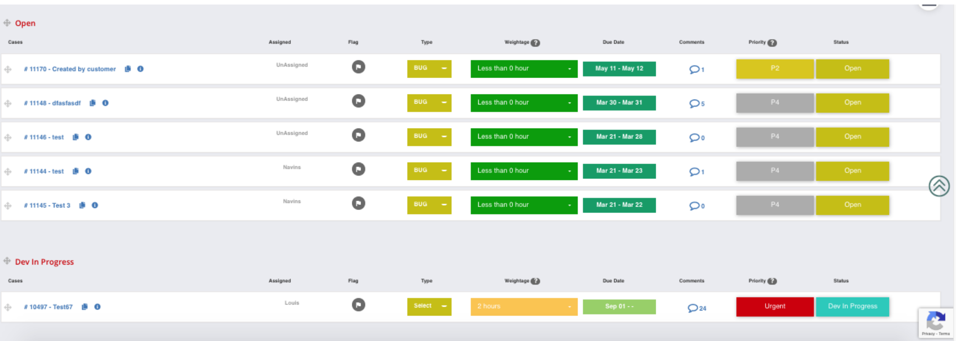




18. Sprint Plannings

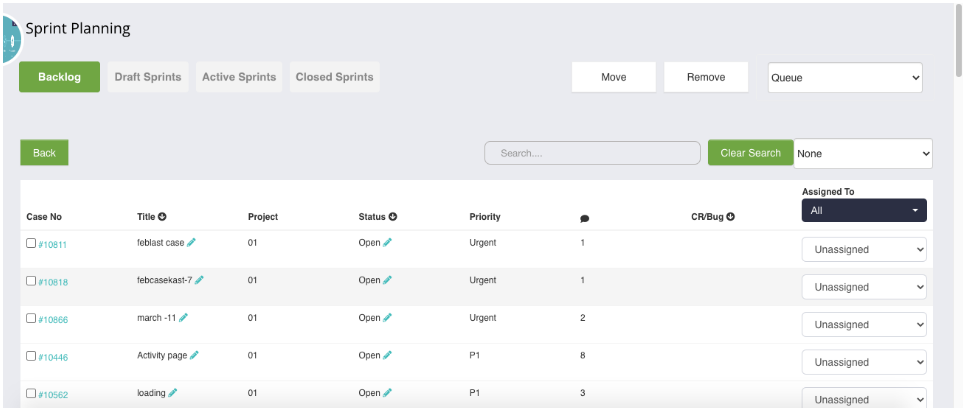
Sprint planning is an important part of the Agile project management methodology that helps teams plan and execute their work effectively. CaseCamp is a project management software that includes various features to help users manage their tasks, projects, and teams, including a sprint planning feature.

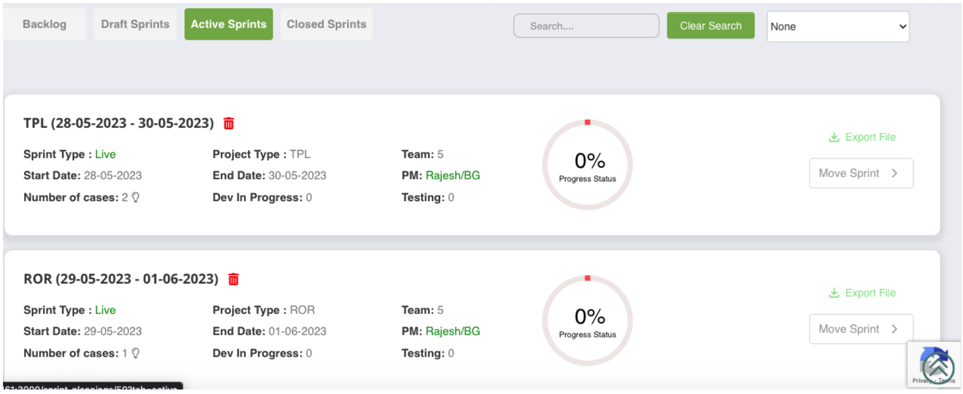
Steps to use the sprint planning feature in CaseCamp:

- Login to CaseCamp and Click on the "Sprints" button located at the top of the screen.
- Click on the Backlog and select the cases to move to the sprint. Then click on the "Move" button.
- Enter the sprint name, start date, end date, and duration.
- Estimate the effort required for each task and assign it to a team member.
- Set priorities for the tasks based on their importance and urgency.
- Review the sprint plan with the team and make any necessary adjustments before starting work.

Benefits of using the sprint planning feature in CaseCamp:

- Improved productivity: Sprint planning helps teams to focus on high-priority tasks and avoid wasting time on low-value work.
- Better communication: The feature encourages communication and collaboration among team members, leading to better outcomes.
- Increased transparency: Sprint planning helps to make work visible, giving team members a clear understanding of what needs to be done and by when.
- Greater agility: Sprint planning allows teams to respond quickly to changes in priorities, scope, and requirements.





19. Project Reports

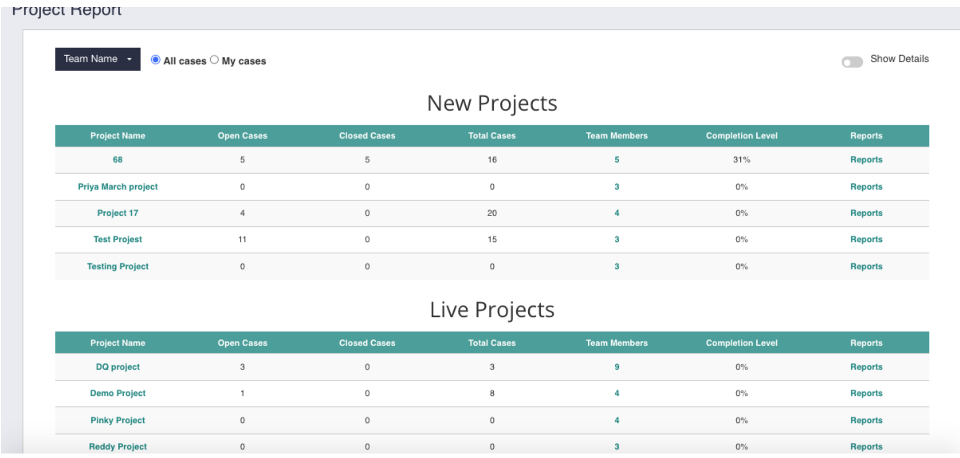
Project reports are an essential part of project management that helps teams to track progress, identify issues, and communicate results to stakeholders.

Steps to use project reports:

- Login to CaseCamp and Click on the "Reports" button located in the menu tab.
- In this screen, we can view the open and closed cases for all the projects, along with the completion percentage.
- We can also see the cases in detail by clicking on the toggle to show details.
- Click on "My cases" to see all the cases assigned to you and what is the completion percentage.

Benefits of using project reports in CaseCamp:

- Improved project management: Project reports help teams to track progress and identify issues, allowing them to take corrective action and ensure project success.
- Better communication: Project reports help to communicate project progress and results to stakeholders, keeping them informed and engaged.
- Increased accountability: Project reports help to hold team members accountable for their work, ensuring that tasks are completed on time and to a high standard.
- Enhanced decision-making: Project reports provide valuable insights into project performance, enabling teams to make informed decisions and improve processes.



Project Report

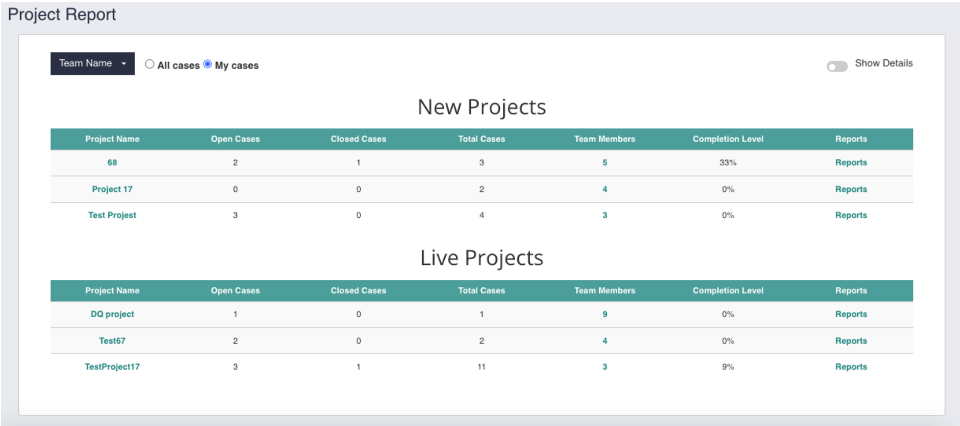
Team Name ▾ All cases My cases Show Details

New Projects

Project Name	Open Cases	Closed Cases	Total Cases	Team Members	Completion Level	Reports
68	5	5	16	5	31%	Reports
Priya March project	0	0	0	3	0%	Reports
Project 17	4	0	20	4	0%	Reports
Test Projest	11	0	15	3	0%	Reports
Testing Project	0	0	0	3	0%	Reports

Live Projects

Project Name	Open Cases	Closed Cases	Total Cases	Team Members	Completion Level	Reports
DQ project	3	0	3	9	0%	Reports
Demo Project	1	0	8	4	0%	Reports
Pinky Project	0	0	0	4	0%	Reports
Reddy Project	0	0	0	3	0%	Reports



Project Report

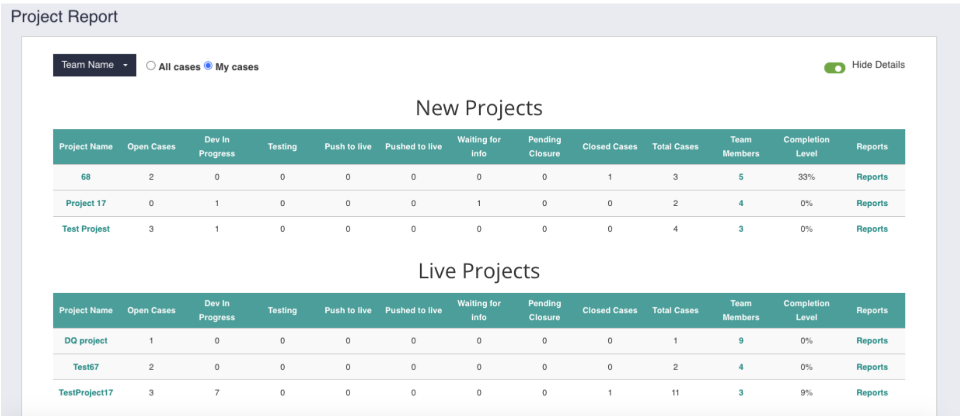
Team Name ▾ All cases My cases Show Details

New Projects

Project Name	Open Cases	Closed Cases	Total Cases	Team Members	Completion Level	Reports
68	2	1	3	5	33%	Reports
Project 17	0	0	2	4	0%	Reports
Test Projest	3	0	4	3	0%	Reports

Live Projects

Project Name	Open Cases	Closed Cases	Total Cases	Team Members	Completion Level	Reports
DQ project	1	0	1	9	0%	Reports
Test67	2	0	2	4	0%	Reports
TestProject17	3	1	11	3	9%	Reports



Project Report

Team Name ▾ All cases My cases Hide Details

New Projects

Project Name	Open Cases	Dev In Progress	Testing	Push to live	Pushed to live	Waiting for info	Pending Closure	Closed Cases	Total Cases	Team Members	Completion Level	Reports
68	2	0	0	0	0	0	0	1	3	5	33%	Reports
Project 17	0	1	0	0	0	1	0	0	2	4	0%	Reports
Test Projest	3	1	0	0	0	0	0	0	4	3	0%	Reports

Live Projects

Project Name	Open Cases	Dev In Progress	Testing	Push to live	Pushed to live	Waiting for info	Pending Closure	Closed Cases	Total Cases	Team Members	Completion Level	Reports
DQ project	1	0	0	0	0	0	0	0	1	9	0%	Reports
Test67	2	0	0	0	0	0	0	0	2	4	0%	Reports
TestProject17	3	7	0	0	0	0	0	1	11	3	9%	Reports

20. On call booking

The on-call booking feature allows users to schedule on-call shifts for their team members.
Steps to use the on-call booking feature in CaseCamp:

- Login to CaseCamp and navigate to the project or task list that you want to schedule on-call shifts for.
- Click on the "On-Call Booking" button located at the top of the screen.
- Click on the "New Schedule" button to create a new on-call schedule.
- Enter the start and end date for the schedule and select the team members who will be on-call during this time.

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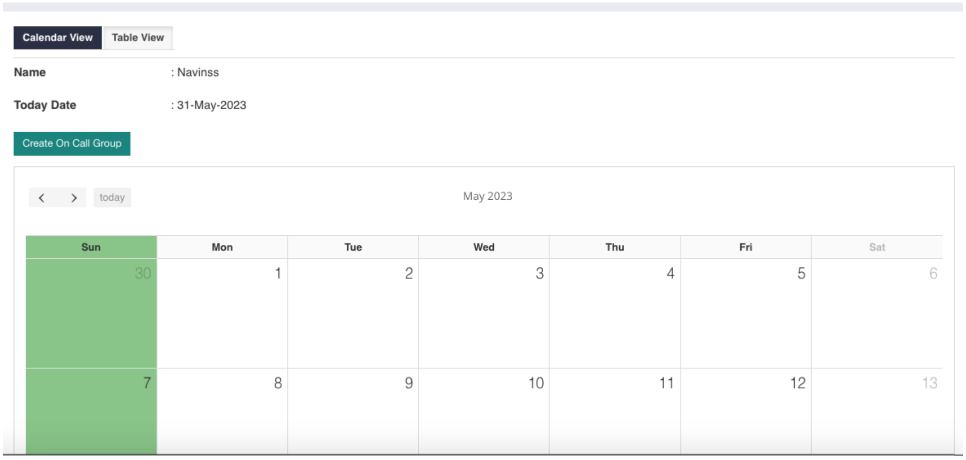
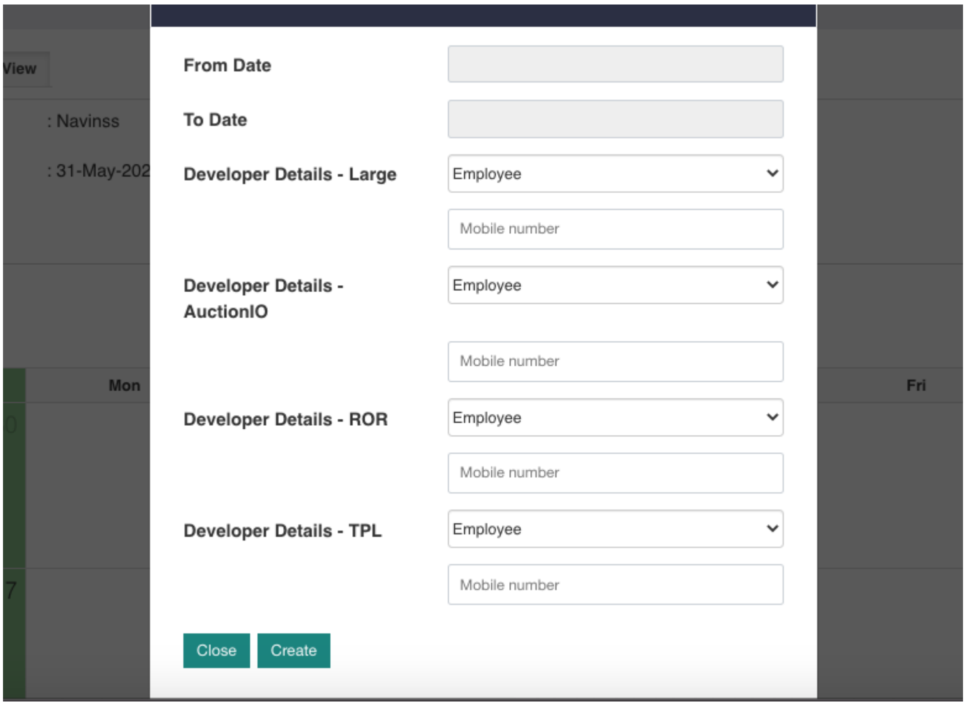
- Click on the "Save" button to save the new on-call schedule.
- You can also edit or delete existing on-call schedules by clicking on the "Edit" or "Delete" buttons next to the schedule.
- To view the on-call schedule, click on the "On-Call Schedule" tab located at the top of the screen.

Benefits of using the on-call booking feature in CaseCamp:

- Efficient management: The on-call booking feature helps users to manage their team's on-call schedules more efficiently.
- Improved communication: The feature allows team members to know who is on call and when, which can improve communication and collaboration.
- Faster response times: With the on-call booking feature, team members can quickly know who is responsible for handling issues and respond faster to incidents.
- Better accountability: The feature helps to hold team members accountable for their on-call responsibilities, reducing the likelihood of missed incidents.





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21. Notification Preference

Steps to use:

1) Click on the bell icon in tabs on the left side (below project reports) 2) Click on enable or disable notifications and save the preference.

3) Save button is on the top left corner of the page.

Note:

- If notifications are enabled, you will be receiving all the mails from CaseCamp
- If notifications are disabled, you will not be receiving any mails from that project.
- if you are mentioned in a comment or a case is assigned to you, you will be receiving the mail even if the notifications are disabled.

Benefits of using the notification preference feature in CaseCamp:

- Customized notifications: Users can customize their notifications based on their specific needs and preferences, ensuring they receive only relevant information.
- Increased productivity: The feature helps to keep users up-to-date with project changes and updates, allowing them to respond quickly and stay productive.
- Improved communication: Notifications help to improve communication and collaboration among team members by keeping everyone informed about project updates and changes.
- Better time management: Users can set notification preferences to avoid being bombarded with notifications during non-work hours, improving their work-life balance and time management.