



# ALOE User Guide

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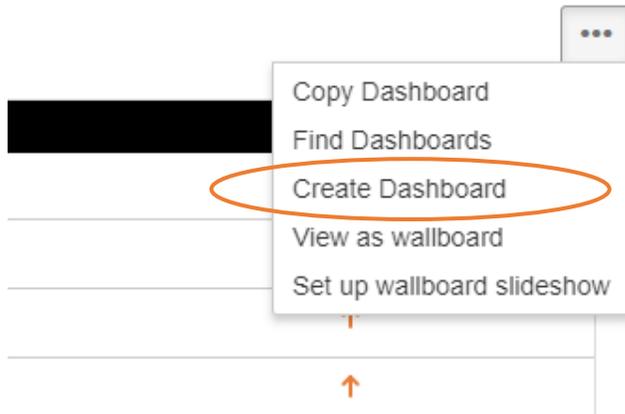
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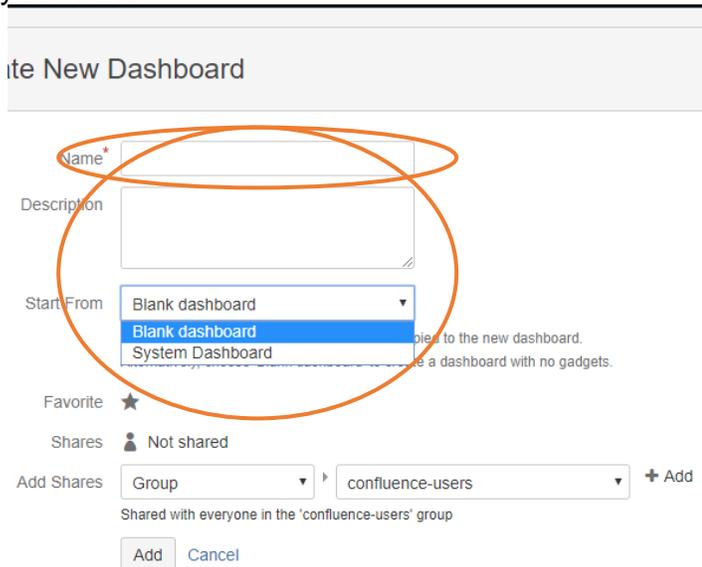


## 1. Managing your View

- a. Individual user dashboard – Each user can also can easily customize the dashboard for themselves. Simply go to the button with the three little dots on the top right-hand corner of the System Dashboard, then select Create Dashboard.

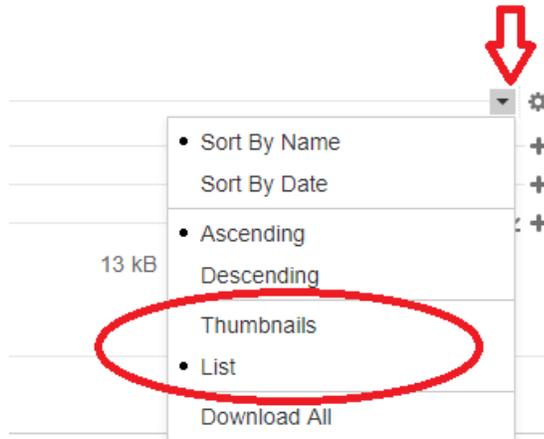


- b. Provide a name and description and select any of the existing dashboards to from which to start. You can add gadgets from the menu selection and customize your view.

A screenshot of the 'Create New Dashboard' form. The form includes a 'Name' field, a 'Description' text area, and a 'Start From' dropdown menu. The 'Start From' dropdown is open, showing options: 'Blank dashboard', 'Blank dashboard', and 'System Dashboard'. The 'Name' field and the 'Start From' dropdown are circled in orange. Below the form, there are options for 'Favorite' (star icon), 'Shares' (person icon, 'Not shared'), and 'Add Shares' (dropdown menu showing 'Group' and 'confluence-users', with an '+ Add' button). At the bottom, there are 'Add' and 'Cancel' buttons.

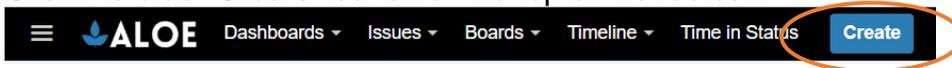
- c. Changing icons in "Attachments"

- Click on the down arrow on the Attachments section, select the view of attachments you prefer – Thumbnails or List

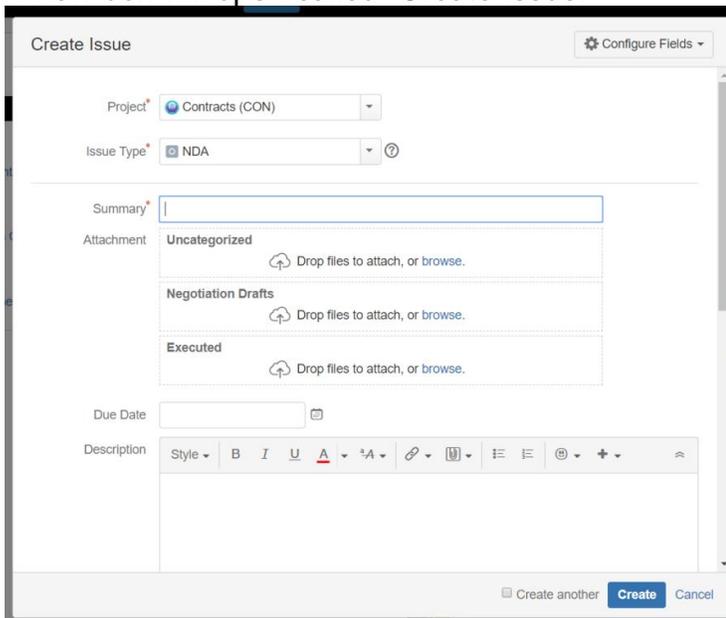


## 2. Creating New Issues

- a. Click the blue "Create" button at the top of the toolbar.



- b. A new box will open called "Create Issue."



- c. Choose the project type from the drop-down menu. You can also attach files, assign a due date, etc.

Project\* **Contracts (CON)**

Issue Type\* **Dispute (DIS)** ?

Summary\* Dispute (DIS)

Attachment Employment (EM)

General (GEN) attach, or browse.

Special Projects (SP)

Drop files to attach, or browse.

Executed

Drop files to attach, or browse.

- d. Once the form is complete, assign it to the appropriate personnel, click the blue "Create" button at the bottom right and your issue has been created.

Create Issue Configure Fields

Description

Assignee **Automatic**

Assign to me

Labels

Begin typing to find and create labels or press down to select a suggested label.

Effective Date

Internal Signer Name

Internal Signer Title

Internal Signer Email

Create another **Create** Cancel

### 3. Working an Issue

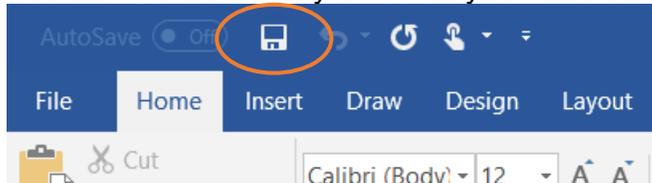
#### Edit an Attachment

- a. Hover over any existing attachment. A box will appear that says, "Edit attachment directly."

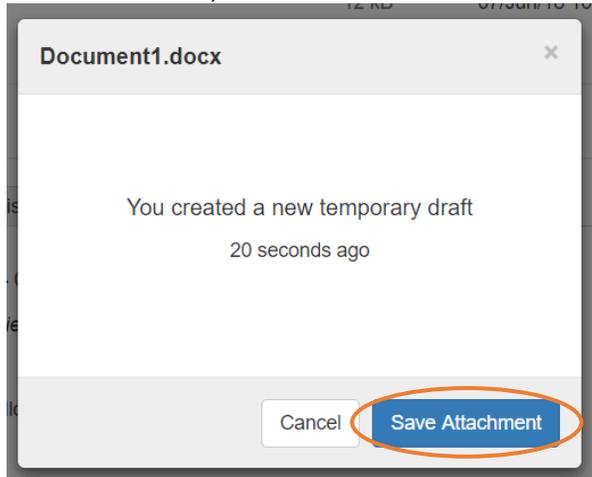


- b. A dialog box and your attachment will open in Word. Edit as necessary and click the Save icon in the Word toolbar. (Icons may vary depending on version of Word used.)

You can save as many times as you need before you move to step 3.



- c. Once finalized, click the blue "Save Attachment" button in the dialog box.

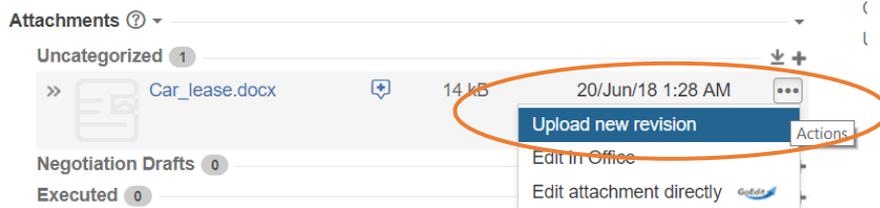


- d. Now your new version is saved. Close the file on your computer.

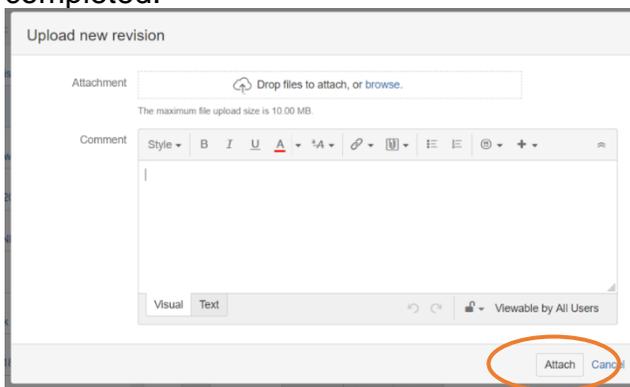
## Save a New Version of Attachments

(From a Third-Party Source; if a new thread was started, etc.)

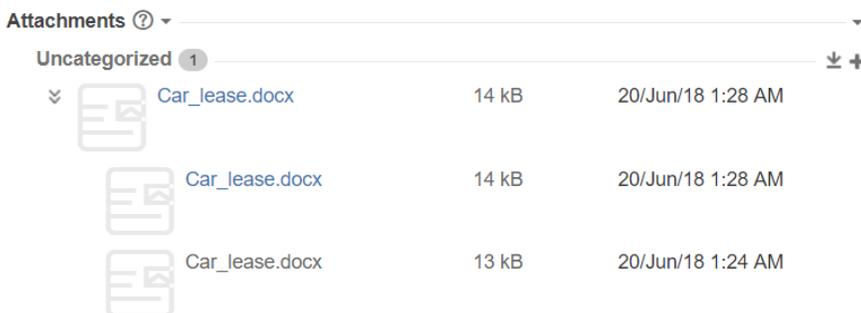
- a. Click on the three dots next to the issue that needs updating and choose "Upload new revision."



- b. Attach the new version, comment on what has changed, and click "Attach" when completed.

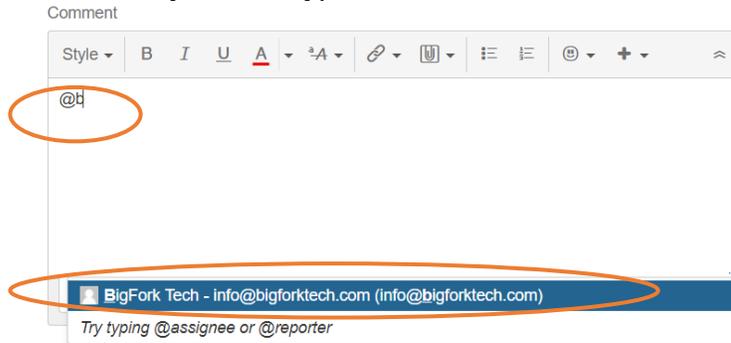


- c. Your new version is now added. You can verify by clicking the two gray arrows to the left of the document. The most current version will be on top.

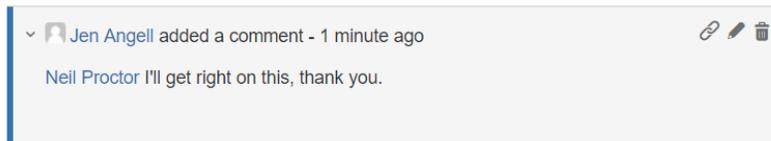


## Collaborate with Internal Resources

- Send comments and questions by simply tagging recipients like on social media apps (use @username). You can select recipients from a drop-down box once the "@" symbol is typed.



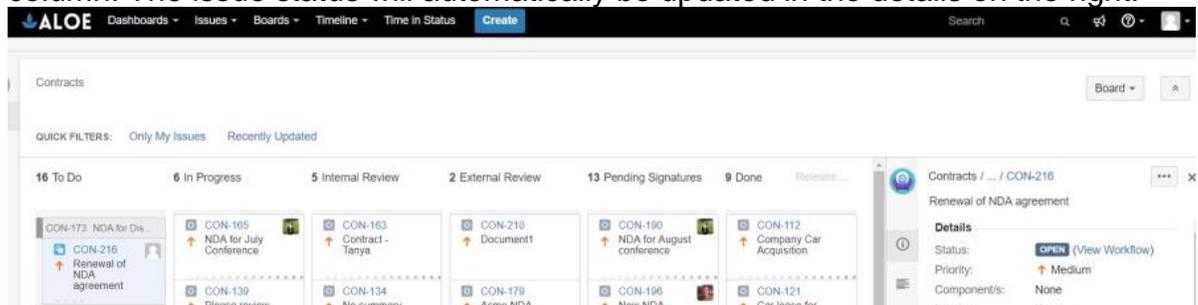
- Individual updates are sent to the relevant users via comments and an email. Updates are also made within ALOE.



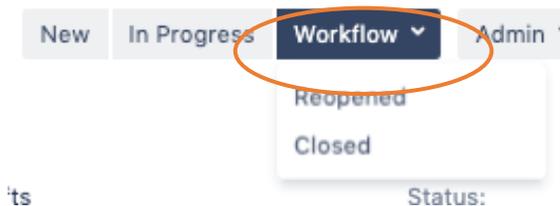
## Close an Issue

There are two ways to close an issue:

- In the boards view, simply drag and drop the matter to the "Done" (or equivalent) column. The issue status will automatically be updated in the details on the right.



- From the issue screen, select "Done," "Closed," or the equivalent from the Workflow dropdown.



## 4. Connect Issues

### Clone an Issue

- a. To duplicate an issue, click on the "More" button and select "Clone."

Contracts / CON-132  
California Theme Park NDA 5.1.2018

Edit Comment Assign **More** Internal Review External Review

Log work  
Attach files  
Add vote  
Voters  
Watch issue  
Watchers  
Create sub-task  
Convert to sub-task  
Create linked issue  
Move  
Link  
**Clone**  
Labels

Clone this issue

Details  
Type: Status: **IN PROGRESS**  
Priority: (View Workflow)  
Resolution: Unresolved  
Labels: **FREE**  
Internal Signer Name:  
Internal Signer Title:  
Internal Signer Email:  
External Signer Name:  
External Signer Title:  
External Signer Email:  
Work Points:

- b. A new issue will be created that duplicates the original issue. You will be the reporter of the new issue.

Contracts / CON-202 NDA for Disney 6.19.2018 / CON-209  
CLONE - Compliance buy-off

Edit Comment Assign More Internal Review External Review Workflow

Details  
Type: **Sub-task** Status: **OPEN** (View Workflow)  
Priority: **Medium** Resolution: Unresolved  
Labels: None

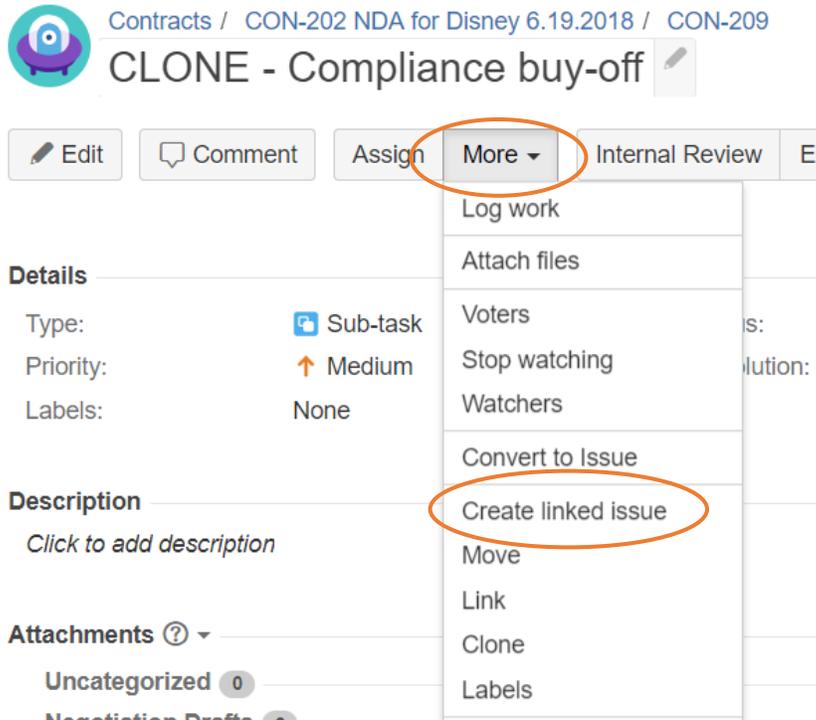
Description  
Click to add description

Attachments 0  
Uncategorized 0  
Negotiation Drafts 0  
Executed 0

Issue Links

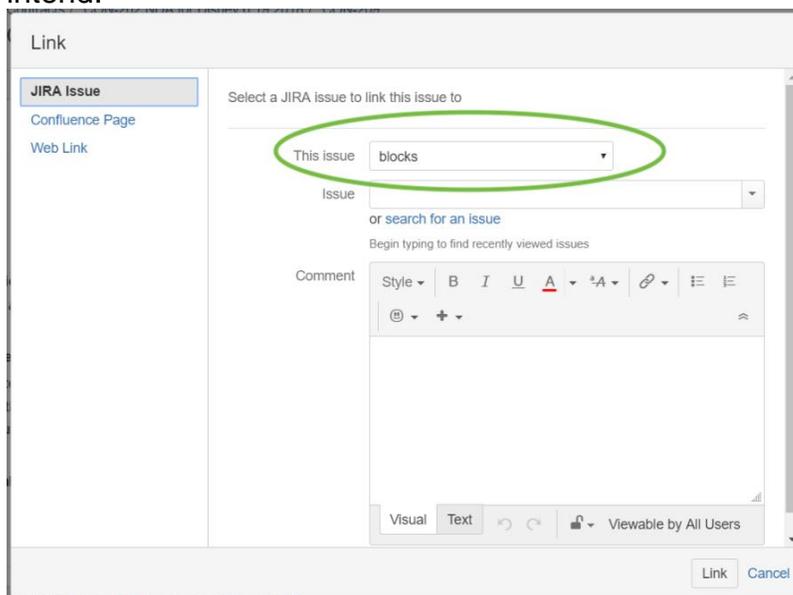
## Link Issues

- a. To link related issues (new or existing) in the official record, click "More," then either "Create Linked Issue" (for new) or "Link" (for existing).

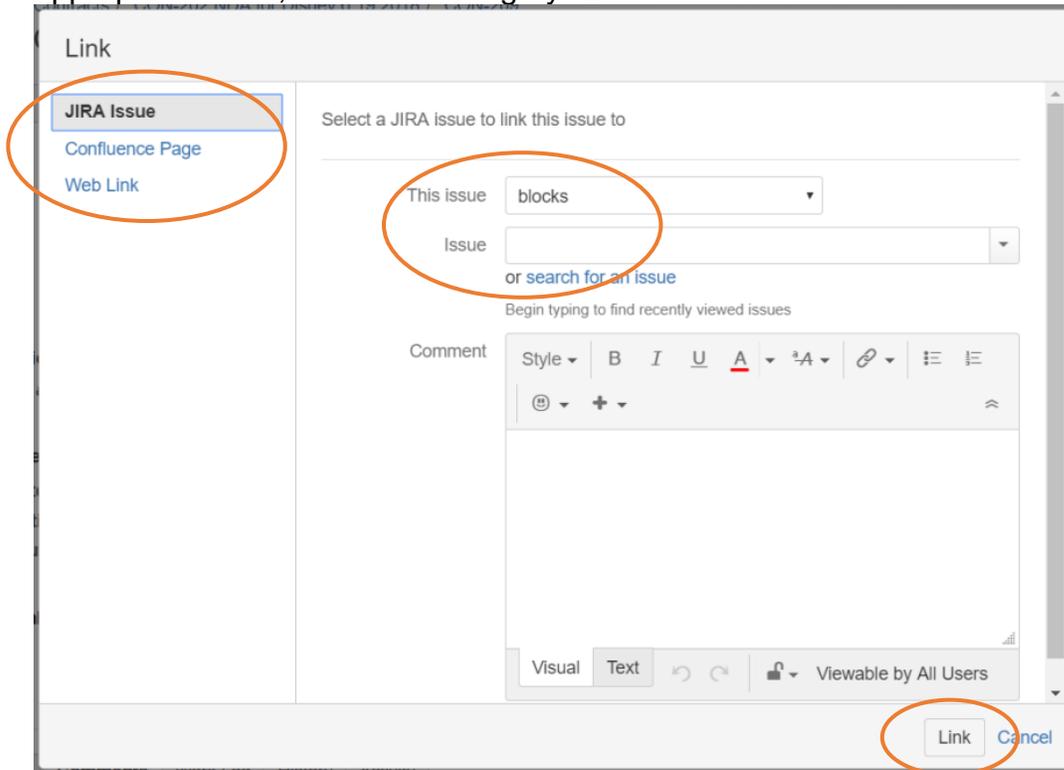


- b. "Create linked issue" will look like the image below. Fill in the appropriate fields and click the blue "Create" button at the bottom.

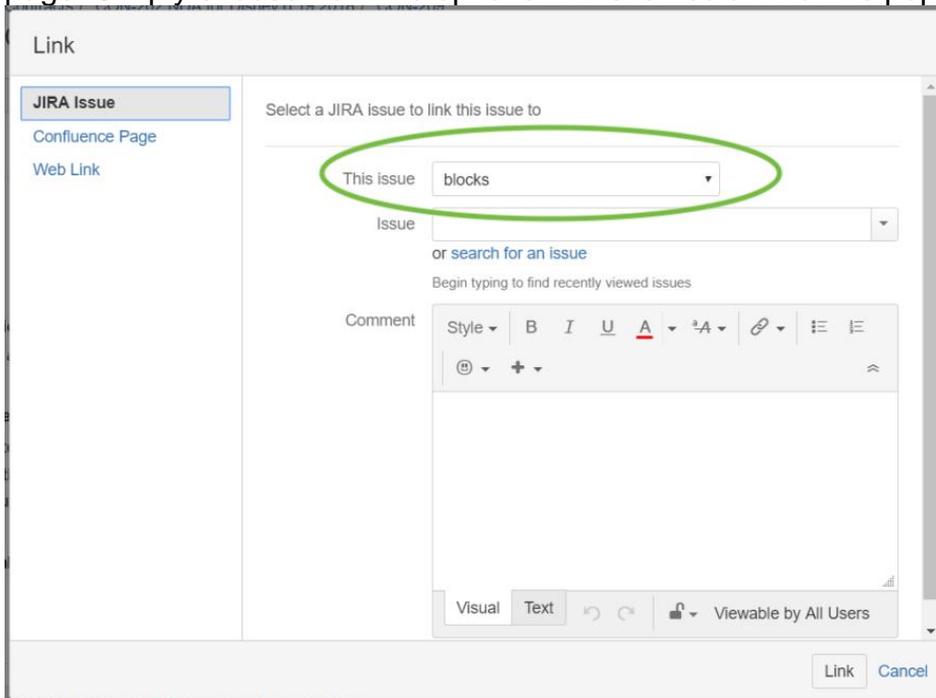
\*Note: there are multiple options when linking. An issue can block others, be blocked by others, cause another, and more. Ensure you select the option you intend.



- c. "Link" will connect existing content and will look like the image below. Choose which type of issue you would like to link from the menu at the left, complete the appropriate fields, then click the gray "Link" button at the bottom.



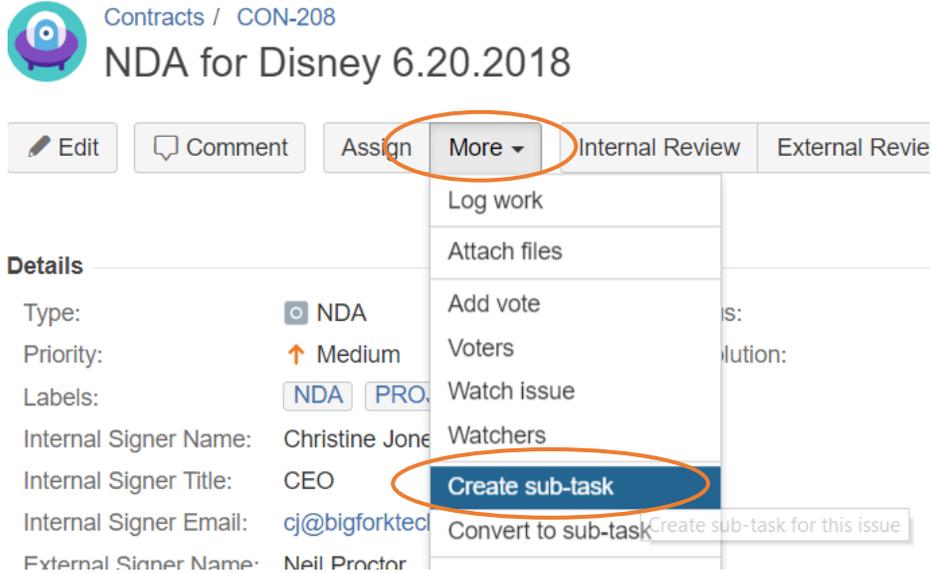
- d. Linking can also be used to connect an issue to a web page or a confluence page. Simply choose from the options in the left column of the pop up.



## Link Sub-Tasks

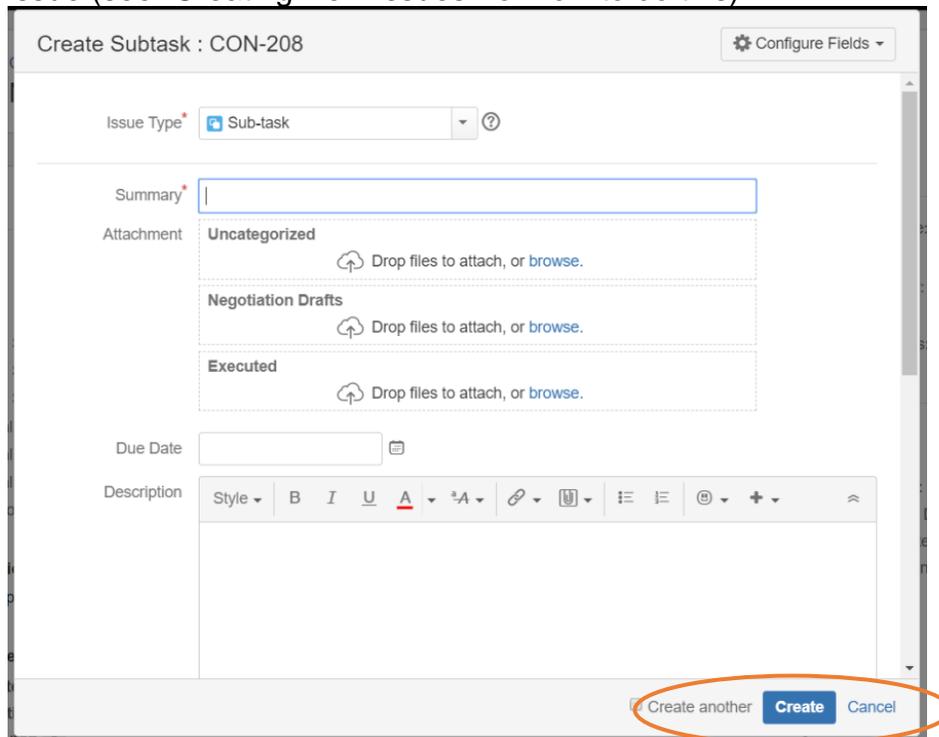
For large tasks within a task (i.e. acquisitions, disputes, etc.), a sub-task can be created and linked to the original issue.

- a. Click "More," then "Create sub-task."



The screenshot shows the interface for a task titled "NDA for Disney 6.20.2018" under the category "Contracts / CON-208". The task details include: Type: NDA, Priority: Medium, Labels: NDA, PRO, Internal Signer Name: Christine Jones, Internal Signer Title: CEO, Internal Signer Email: cj@bigforktech.com, and External Signer Name: Neil Proctor. A "More" dropdown menu is open, listing options such as "Log work", "Attach files", "Add vote", "Voters", "Watch issue", "Watchers", "Create sub-task", and "Convert to sub-task". The "Create sub-task" option is highlighted with an orange circle.

- b. Complete the sub-task in the appropriate fields as if you were creating an original issue (see "Creating New Issues" for how to do this).



The screenshot shows the "Create Subtask : CON-208" form. The "Issue Type" is set to "Sub-task". The "Summary" field is empty. The "Attachment" section has three categories: "Uncategorized", "Negotiation Drafts", and "Executed", each with a "Drop files to attach, or browse." prompt. The "Due Date" field is empty. The "Description" field has a rich text editor toolbar. At the bottom right, the "Create" button is highlighted with an orange circle.

## Labels

- Use labels to track related issues (much in the same way hashtags are used in social media). When creating or editing an issue, enter the preferred key term(s) in the "Labels" field. Then click "Update."

Edit Issue : CON-208

Assignee: Dick Morgan

Priority: Medium

Labels: NDA, PROJECTCOFFEE

Original Estimate: (eg. 3w 4d 12h)

Remaining Estimate: (eg. 3w 4d 12h)

Effective Date: 20/Jun/18

Internal Signer Name: Christine Jones

Internal Signer Title: CEO

Internal Signer Email: cj@bigforktech.com

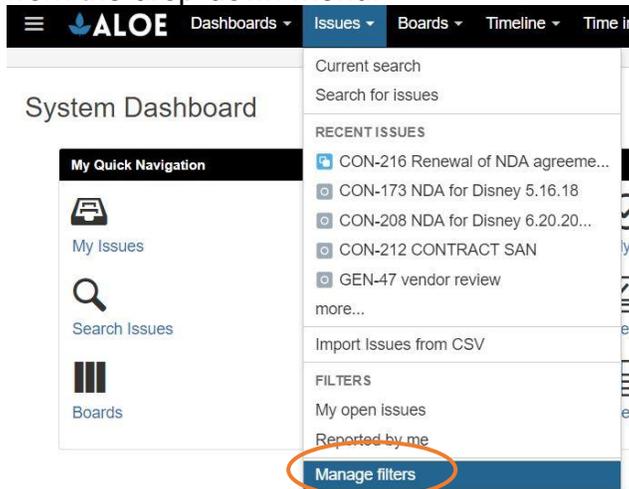
External Signer Name: Neil Proctor

Update Cancel

## 5. Filters

### Existing Filters

- To find existing filters, click "Issues" on the toolbar. Then select "Manage Filters" from the drop-down menu.



- b. This will bring you to "Popular filters." Here you can select from a bank of filters by which to group issues.

Manage Filters

Popular Filters		
Name	Owner	Shared With
☆ Due in 30 days	Neil Proctor (Neil)	• Group: jira-software-users
☆ Expiring Contracts	Neil Proctor (Neil)	• Group: jira-software-users
☆ ProjectCoffee	Neil Proctor (Neil)	• Group: jira-software-users
☆ Updated in last 2 days	Neil Proctor (Neil)	• Shared with logged-in users
☆ Filter for Contracts	Neil Proctor (Neil)	• Project: Contracts
☆ Approved (CON)	Neil Proctor (Neil)	• Project: Contracts
☆ Approved (DIS)	Neil Proctor (Neil)	• Project: Dispute
☆ Approved (EM)	Neil Proctor (Neil)	• Project: Employment

## New Filters

There are two ways to create a new filter:

- a. From the "Manage Filters" screen, select a base filter, make changes following the references below, and select "Save As." Rename the filter.

★ ProjectCoffee	Neil Proctor (Neil)
★ Updated in last 2 days	Neil Proctor (Neil)
★ BofA Audit	Tanya Avila (tavi)
★ Bret report	Tanya Avila (tavi)
★ Filter for Contracts	Neil Proctor (Neil)
★ <u>my issues</u>	Tanya Avila (tavi)

- b. Select the issues drop down from the top left. Select "Search for Issues."

Projects ▾ Issues ▾ Boards ▾ Emails ▾ Timelin

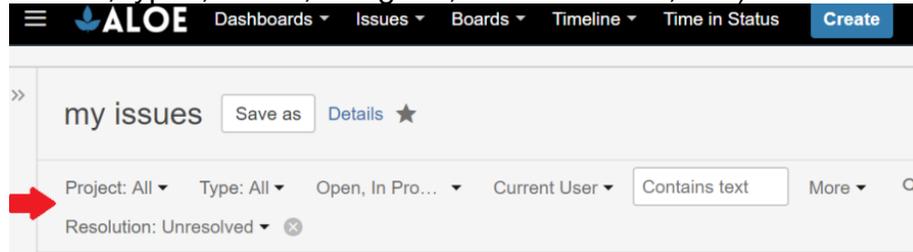
Current search

Search for issues

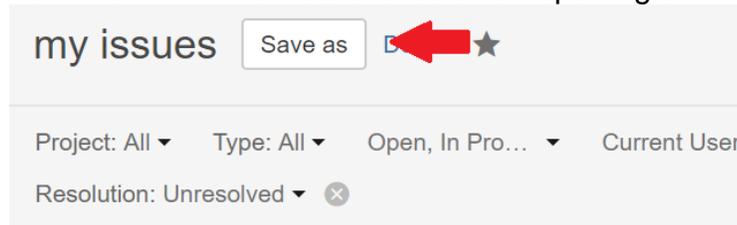
RECENT ISSUES

DEV-40 Challenge Award Thermom...

- In the section below the filter title you may change the assumptions (select boards, types, status, assignee, add a text sort, etc.).



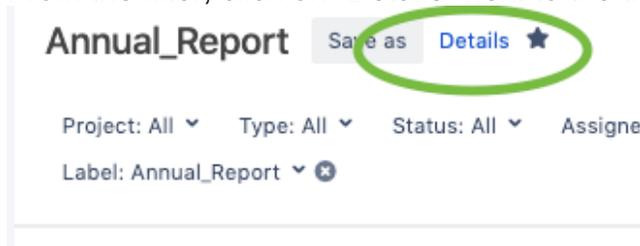
- Once the filter is set to your satisfaction, select Save As and name your new filter. It will now be available for reporting or timelines.



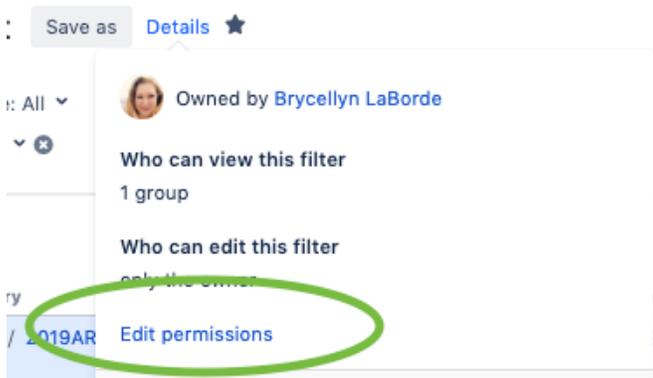
### Share Filters

When a filter is created, the user that created it is the only person who can view and edit it. Follow the steps below to open it to other users.

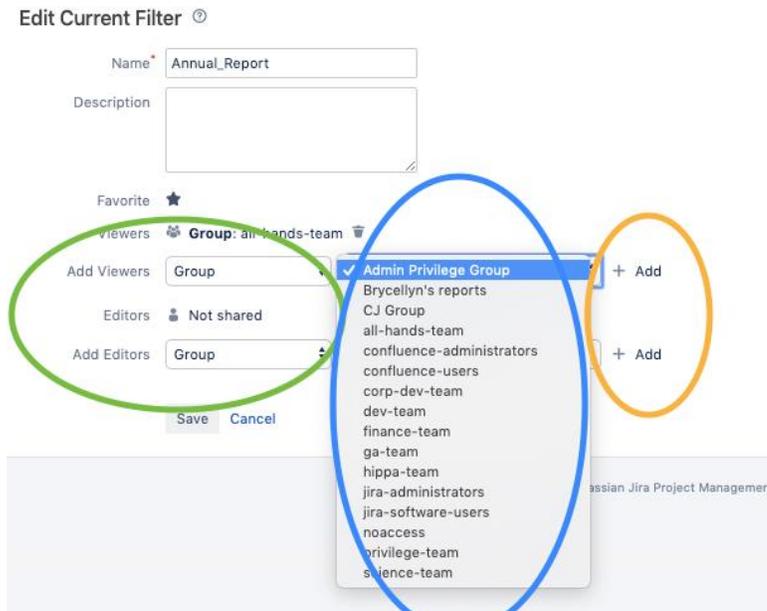
- From the filter, click on "Details" next to the title of the filter.



- Select "Edit Permissions."



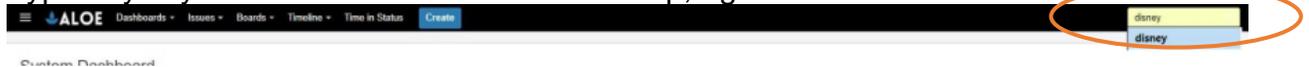
- c. Determine users/groups that can view and edit the filter. \*Edit permissions will automatically give viewing permissions.  
Be sure you select "Add" once you make your selection.



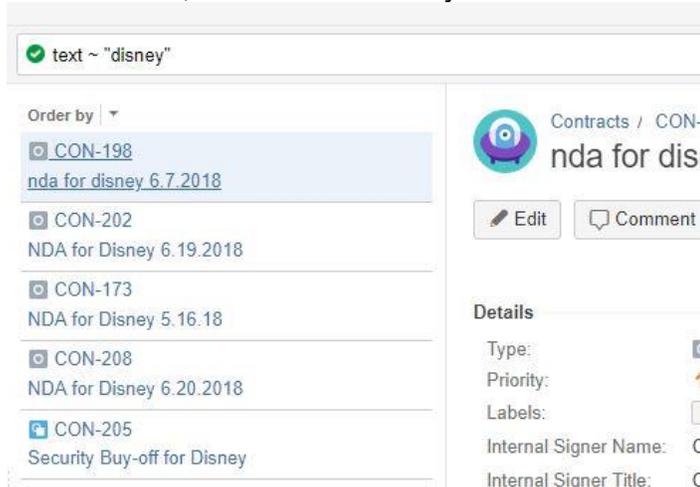
## 6. Search

### By Issue

- a. Type any keyword in the "Search" box in the top, right corner of the toolbar.

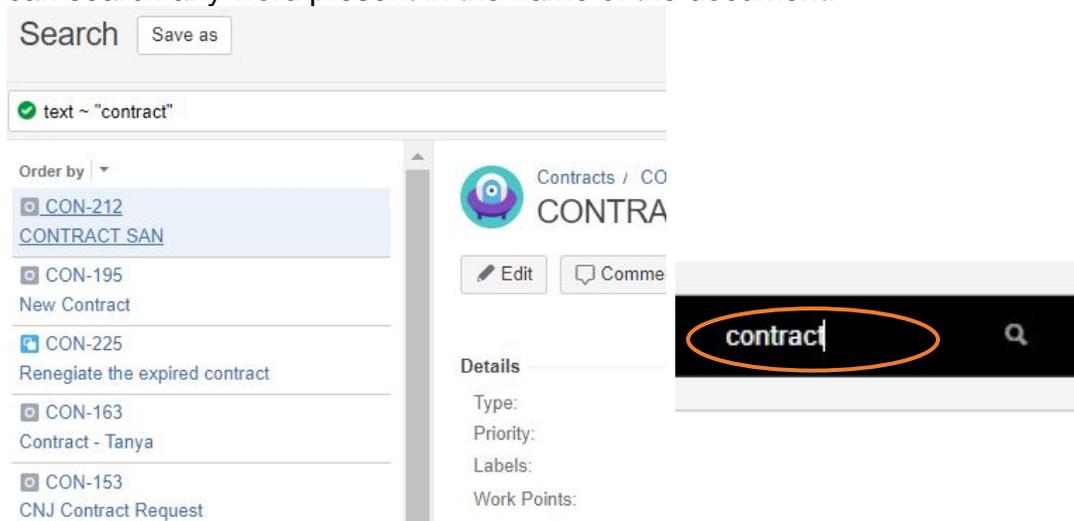


- b. This will bring up a list of all issues you have access to containing that keyword. From the list, select the issues you would like to view in detail.



## By Attachment

- a. You can also search by document type by using the same steps as above. You can search any word present in the name of the document.

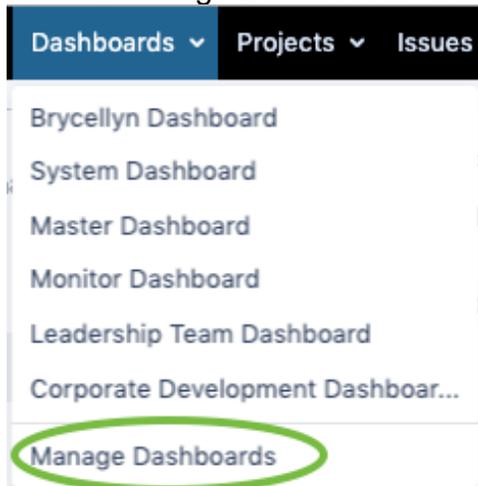


The screenshot shows a search interface with a search bar containing the text "text ~ 'contract'". Below the search bar, there is a list of search results. The first result is "CON-212 CONTRACT SAN", which is highlighted. Other results include "CON-195 New Contract", "CON-225 Renegiate the expired contract", "CON-163 Contract - Tanya", and "CON-153 CNJ Contract Request". To the right of the search results, there is a sidebar with a search bar containing the word "contract" and a magnifying glass icon. Below the search bar, there are buttons for "Edit" and "Comme". The sidebar also contains a "Details" section with fields for "Type:", "Priority:", "Labels:", and "Work Points:".

## 7. Dashboards

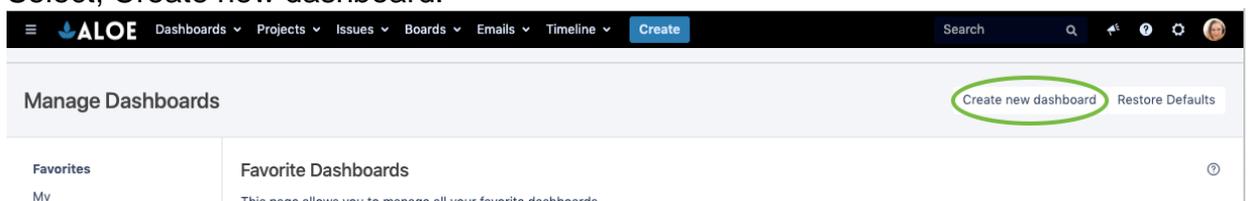
### Create Dashboards

- a. Select "Manage Dashboards" from the Dashboards drop down in ribbon.



The screenshot shows a dropdown menu for "Dashboards". The menu items are: "Brycellyn Dashboard", "System Dashboard", "Master Dashboard", "Monitor Dashboard", "Leadership Team Dashboard", "Corporate Development Dashboard...", and "Manage Dashboards". The "Manage Dashboards" option is circled in green.

- b. Select, Create new dashboard.



The screenshot shows the "Manage Dashboards" page. At the top, there is a navigation bar with "ALOE" and various menu items: "Dashboards", "Projects", "Issues", "Boards", "Emails", "Timeline", and "Create". Below the navigation bar, there is a search bar and a "Create new dashboard" button, which is circled in green. The page also contains a "Restore Defaults" button and a "Favorites" section.

- c. Select whether to start from a blank screen or using an existing dashboard as a template. Name your dashboard. You may set permissions on this screen as well. Click "Add" when finished configuring.

### Create New Dashboard

Name\*

Description

Start From:  Blank dashboard  
 System Dashboard  
 Brycellyn Dashboard  
 Corporate Development Dashboard  
 Leadership Team Dashboard  
 Master Dashboard  
 Monitor Dashboard

Favorite Viewers

Add Viewers:  Admin Privilege Group + Add

Editors:

Add Editors:  Admin Privilege Group + Add

- d. From the dashboard screen, select a layout.

Sample Add gadget **Edit layout** ...

Drag your gadgets here or [add a new gadget](#).

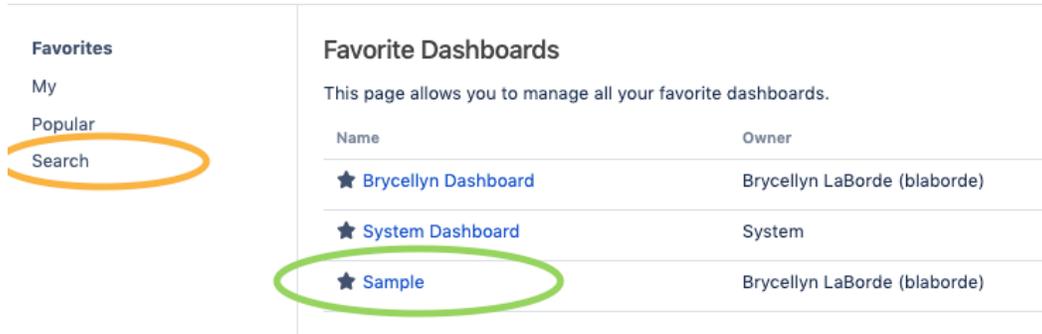
Drag your gadgets here or [add a new gadget](#).

### Edit layout

Choose dashboard layout

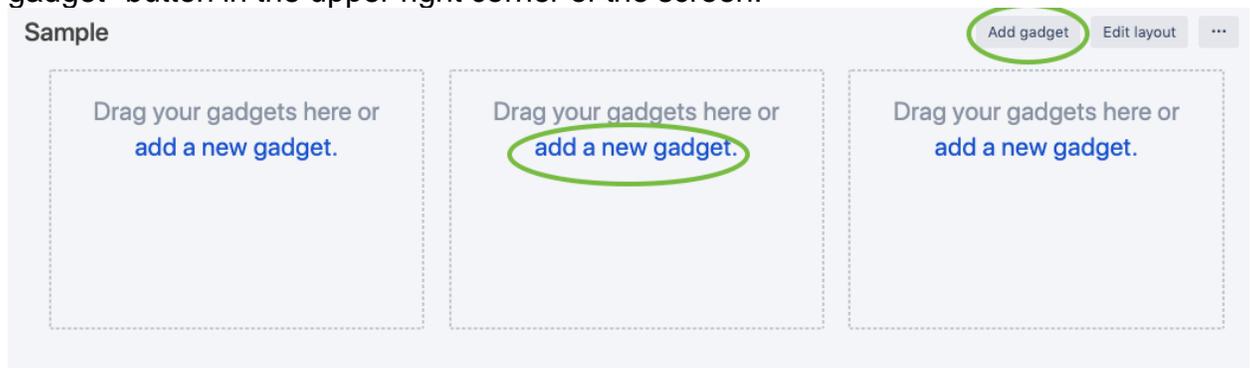
## Add / Edit Gadgets

- To access your dashboard, either select it from the drop down from "Dashboards" in the ribbon, or from Manage Dashboards you can search for it or find it in your favorites.

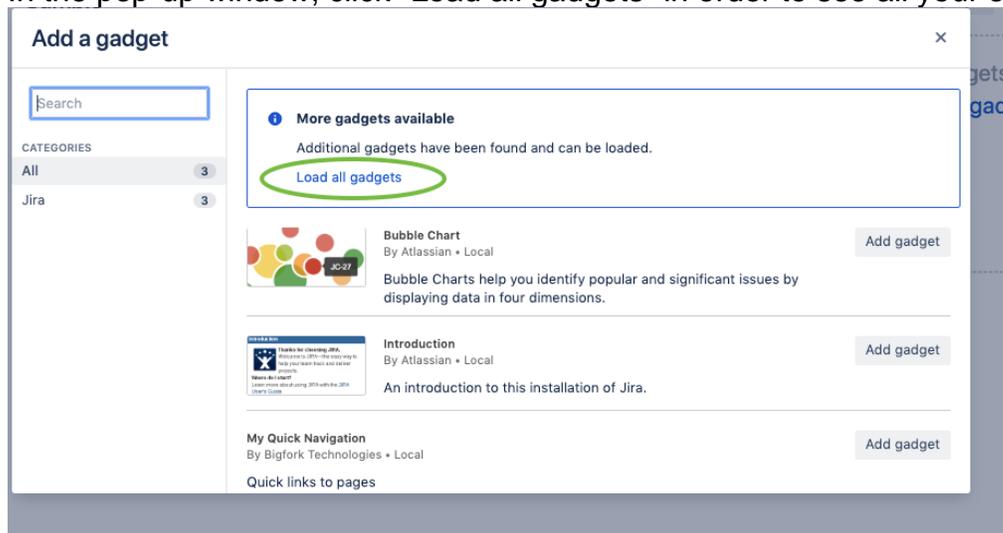


Note: by clicking on the star next to a dashboard, you can add it to or remove it from your favorites list.

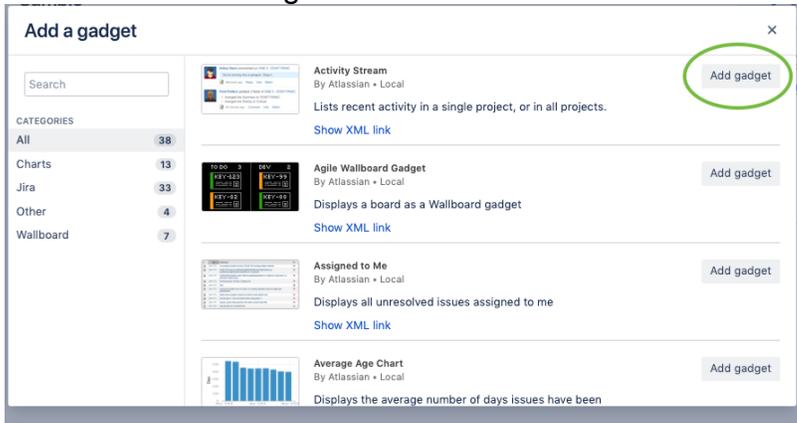
- A gadget can be added either from an empty frame or by clicking the "Add gadget" button in the upper right corner of the screen.



- In the pop-up window, click "Load all gadgets" in order to see all your options.



- d. When "Add gadget" is selected, the dialogue box remains open while the gadget is added to the dashboard. Should you need more than one gadget of that type, simply press "Add gadget" more than once. Multiple gadgets of any type may be added before closing the window.

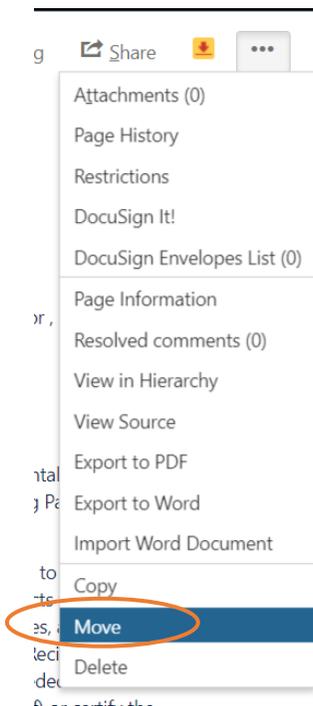


- e. Configure the gadget with the appropriate filter and settings to get what you need.

## 8. Manage Projects

### Move Issues between Boards

Open the issue to be moved and click on the three small dots in the top right corner. Then select "More" from the drop-down menu.



- a. Select the new location of the issue. Then click the blue "Move" button at the bottom.

Move Page – 'NDA for Disney 6.20.2018 CON-208 2018-06-20' [Help](#)

**Advanced**  
Search  
Recently Viewed  
Browse

Specify the new parent page for this page and its children by space and title.

New space:

New parent page:

Start typing a page title to see a list of suggestions.

Current location: Contracts  
New location: Contracts

Reorder

## 9. Create Reports

### Project Reports

You can create graphic reporting in ALOE using the "Reports" function within any project - on the left sidebar - and choosing the desired issue analysis. These reports are temporary and do not retain their settings over time. Below are some examples:

ALOE Dashboards - Issues - Boards - Timeline - Time in Status [Create](#) Search

**Contracts**  
Summary  
Issues  
**Reports**

PROJECT SHORTCUTS  
Process management ideas  
Working in a project

**All reports**

**Issue analysis**

**Average Age Report**  
Shows the average age of unresolved issues for a project or filter. This helps you see whether your backlog is being kept up to date.

**Created vs. Resolved Issues Report**  
Maps created issues versus resolved issues over a period of time. This can help you understand whether your overall backlog is growing or shrinking.

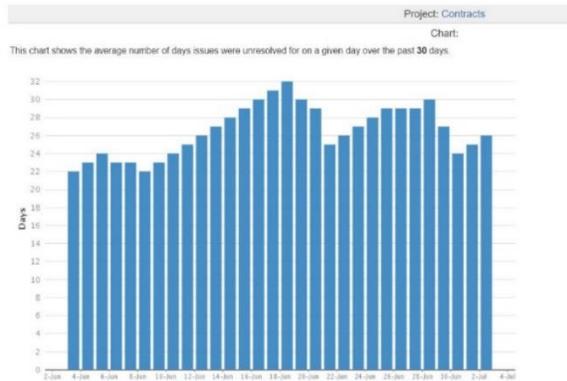
**Pie Chart Report**  
Shows a pie chart of issues for a project/filter grouped by a specified field. This helps you see the breakdown of a set of issues, at a glance.

**Recently Created Issues Report**  
Shows the number of issues created over a period of time for a project/filter, and how

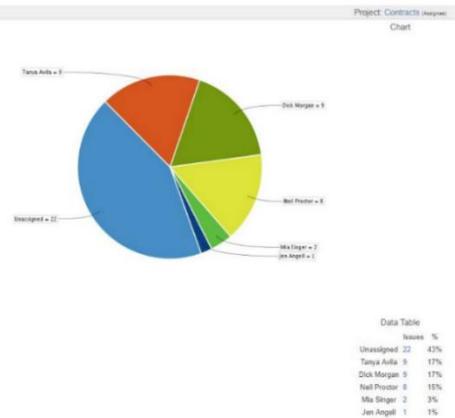
**Resolution Time Report**  
Shows the length of time taken to resolve a set of issues for a project/filter. This helps

**Single Level Group By Report**  
Shows issues grouped by a particular field for a filter. This helps you group search

## Average Age Report



## Pie Chart Report



## Filter Reports

To create standard reports that can be either used on a dashboard or can be emailed through a subscription, set up the filter according to the instructions in [New Filters](#).

To subscribe to this filter as a report:

- a. From the filter, go to "Details" next to the filter name

**Brycellyn | Due in next 5 days** Save as **Details** ★

Project: All ▾ Type: All ▾ New, In Progress, Reopen... ▾ Current User ▾

Due Date: Due in next 5 days ▾ ×

- b. Select "New Subscription"

Save as **Details** ★

Owned by **Brycellyn LaBorde**

**Who can view this filter**  
only the editors

**Who can edit this filter**  
only the owner

[Edit permissions](#)

**Subscriptions**

This filter has no subscriptions.

[New subscription](#)

- c. Set the group, frequency, and time the report should be delivered. This will be sent to the user's / group's email address.

\*Note: a user can only select a group to send an email to if they are a member of that group. Users are not able to set up subscriptions for other individual users or groups of which they are not members.

#### Filter Subscription

Recipients

Schedule  Daily  
 Days per Week  
 Days per Month  
 Advanced

Interval  at

The current server time is 14 October 2019, 07:35 PM - Coordinated Universal Time

Email this filter, even if there are no issues found

### Dashboard Reports

To create standing, regularly updating reports, add gadgets to a dashboard that reflect the type of report desired: bar chart, pie chart, list, etc.

To do this, follow the instructions in [Add / Edit Gadgets](#) to set the gadget on the dashboard, and the instructions [here](#).