



GeoFields TRACK

GeoFields Track User Guide for Clients

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Introduction to GeoFields TRACK

GeoFields TRACK provides the gateway that allows you to manage issues, or incidents, that arise with software products and service tasks at GeoFields. Incidents are logged in a project structure. Project structure separates out service tasks and software products.

Incidents logged with GeoFields TRACK may include:


- Software bugs
- Enhancement requests
- Implementation requests
- Research assignments

Accessing GeoFields TRACK

GeoFields TRACK is available to all registered users through the Internet. To access the web version of GeoFields TRACK:

1. Open an Internet Explorer session
2. Enter the following address into the Internet Explorer address bar:
<http://track.geofields.com>
3. Enter your User Name and Password at the prompt.

Password Settings

1. Open a session of Internet Explorer and navigate to the following web location:
<http://track.geofields.com>
2. When prompted enter your user name. User names have the format of
[FirstName].[LastName]
3. Enter the password which was provided for you. Select **Log On** to continue.
4. From the menu, select **Options > Settings**
5. Under the User Logon enter a new password, and confirm the new password.
6. After setting the new password select the save icon. 



Be sure to make a note of the new password for future log on purposes.

Working in GeoFields Track



GeoFields TRACK provides navigation using menus and a context sensitive toolbar. The screen shot above displays the menus and toolbar that appear on each GeoFields TRACK screen.

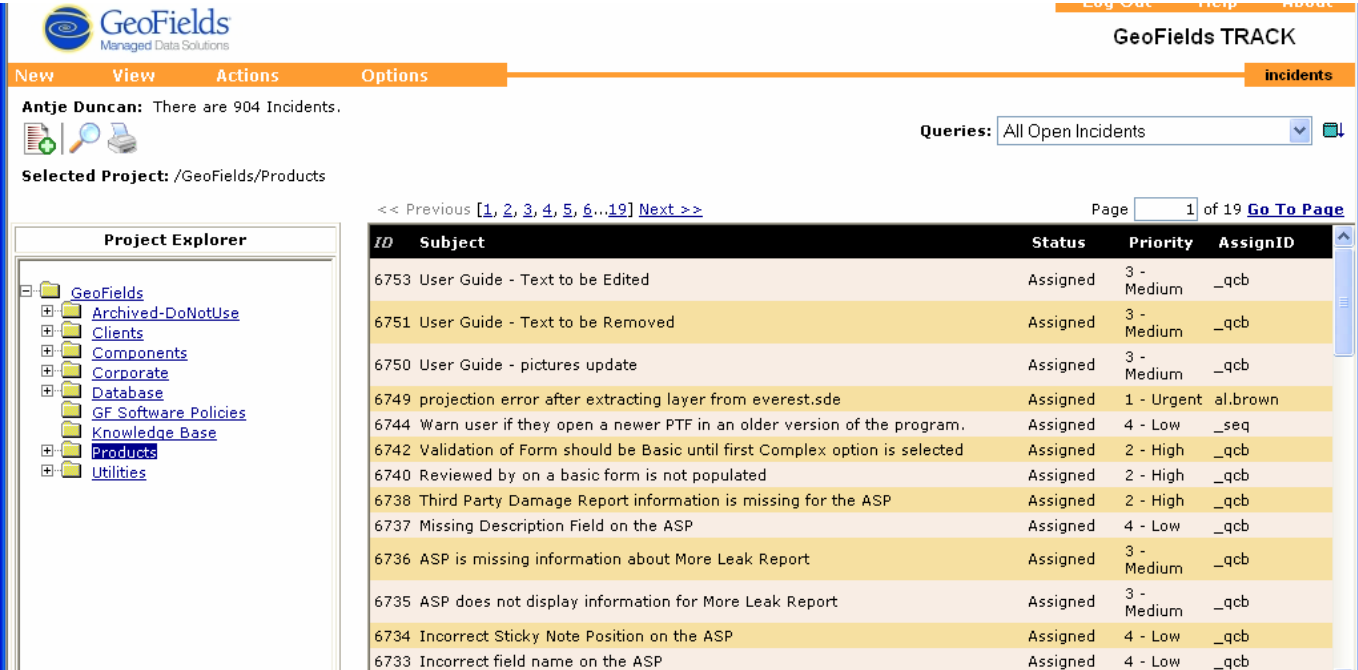
The following list describes the various elements of the GeoFields TRACK menu and toolbar structure:

Name	Image
Application Menu	
Menu	
Query drop-down menu	
Toolbar	

Creating a New Incident

Incidents are created by entering information into the fields of the Incident form. Once the Incident has been created, it is inserted into the database to be shared with other GeoFields TRACK users.

The easiest way to **create a new incident** is to select the product folder in Project Explorer and then select **New | Incident** from the drop-down menu.



The screenshot displays the GeoFields TRACK application interface. At the top, the logo for GeoFields Managed Data Solutions is visible. Below the logo, there is a navigation bar with tabs for 'New', 'View', 'Actions', and 'Options'. A status bar indicates 'Antje Duncan: There are 904 Incidents.' and 'Selected Project: /GeoFields/Products'. A 'Queries' dropdown menu is set to 'All Open Incidents'. The main area is divided into two panes: 'Project Explorer' on the left and a table of incidents on the right. The 'Project Explorer' shows a tree view with folders like 'GeoFields', 'Archived-DoNotUse', 'Clients', 'Components', 'Corporate', 'Database', 'GF Software Policies', 'Knowledge Base', 'Products', and 'Utilities'. The incident table has columns for ID, Subject, Status, Priority, and AssignID.


ID	Subject	Status	Priority	AssignID
6753	User Guide - Text to be Edited	Assigned	3 - Medium	_qcb
6751	User Guide - Text to be Removed	Assigned	3 - Medium	_qcb
6750	User Guide - pictures update	Assigned	3 - Medium	_qcb
6749	projection error after extracting layer from everest.sde	Assigned	1 - Urgent	al.brown
6744	Warn user if they open a newer PTF in an older version of the program.	Assigned	4 - Low	_seq
6742	Validation of Form should be Basic until first Complex option is selected	Assigned	2 - High	_qcb
6740	Reviewed by on a basic form is not populated	Assigned	2 - High	_qcb
6738	Third Party Damage Report information is missing for the ASP	Assigned	2 - High	_qcb
6737	Missing Description Field on the ASP	Assigned	4 - Low	_qcb
6736	ASP is missing information about More Leak Report	Assigned	3 - Medium	_qcb
6735	ASP does not display information for More Leak Report	Assigned	3 - Medium	_qcb
6734	Incorrect Sticky Note Position on the ASP	Assigned	4 - Low	_qcb
6733	Incorrect field name on the ASP	Assigned	4 - Low	_qcb

Incidents are created by entering information into the fields of the Incident form. Once the Incident has been created, it is inserted into the database to be shared with other GeoFields TRACK users.

When entering an Incident in GeoFields TRACK, the administrator sets the default values for the Status, Priority, Severity, Category, Target and Assigned fields. The Requested field will default to the UserID of the User registering the Incident.

Creating a new Incident:

1. Select **New | Incident** from the menu.
2. The **Project** field will default to the project folder.

3. Select the appropriate Product **Found** Version from the drop down menu, if appropriate.
4. Enter a short but meaningful **Subject** that summarizes the request.
5. Select the appropriate values for **Severity** and **Category**.
6. Enter a detailed **Description** in the Description field. The Description should describe the request in detail. Include steps how to reproduce the issue, describe the results of that action and what the result should have been. This will help us understand the nature of the request and enable us to reproduce an issue.
7. Select **Actions | Insert** from the menu or click .

General | Documents

Incident ID: [None]

Project: /GeoFields/Products/DF-Forms/DF-Forms 2.2

Found: Europa Build: Release: [None] Build: Track:

*Subject:

Status: Assigned Requested: antje.duncan

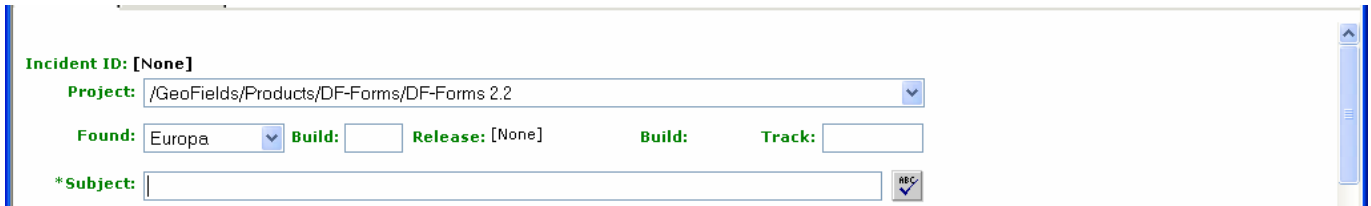
Priority: 5 - TBD Assigned: _ccb

Severity: 5 - Cosmetic Target: antje.duncan

Category: Bug Modified:

Description:

Understanding the Incident Fields



The screenshot shows a web form for an incident header. The fields are as follows:

- Incident ID:** [None]
- Project:** /GeoFields/Products/DF-Forms/DF-Forms 2.2
- Found:** Europa
- Build:** [Empty text box]
- Release:** [None]
- Build:** [Empty text box]
- Track:** [Empty text box]
- *Subject:** [Empty text box]

The Incident header appears on each Incident document tab and contains the following fields:

- Incident ID
- Project
- Found
- Build
- Release
- Build
- Track
- Subject

IncidentID Field

This read-only field displays the Incident's identification number. An Incident ID is automatically assigned to each new Incident.

Project Field

All Incidents are associated with a specific client Project.

Found Field

Each Incident is associated with a specific project version the request was found in. Select the Found Version to associate an Incident with by using the Found drop down box. The Found Version(s) available to choose from are defined by the Administrator.

Build Field

A product version is tied to a build number. That number identifies a specific build whenever it is compiled in software development.

Release Field

Once an incident has been implemented, it will be associated with a specific Release Version. The request will be implemented in the specified Release Version. The Administrator will define the Release Version.

Build Field

A released product version is tied to a build number. That number identifies a specific build whenever it is compiled in Engineering and then released by Quality Assurance.

Track Field

The Track field is provided as a place to enter individual Incident tracking codes. For example, in this field users may wish to enter a tracking code that relates to a system within their organization.

Subject Field

Enter a short but meaningful Subject that summarizes the request. For instance, *Oracle integrity constraint error when clicking Save on Location tab*. The subject summarizes:

1. Problem (Oracle error)
2. Steps performed (clicking Save)
3. Where in the application (Location tab)

Additional Incident Fields

The screenshot shows a form with the following fields and values:

- Status:** Assigned
- Priority:** 5 - TBD
- Severity:** 5 - Cosmetic
- Category:** Bug
- Requested:** antje.duncan
- Assigned:** _ccb
- Target:** antje.duncan
- Modified:** (empty)
- Description:** (empty text area)

- Status
- Requested
- Priority
- Assigned
- Severity
- Target
- Category
- Modified
- Description
- Workaround
- Resolution

Status Field

By default, incidents submitted are in the Submitted state. As incidents are being reviewed or implemented, the status changes depending on which action was performed.

- Submitted
- Assigned
- More Info
- Declined
- Postponed
- Scheduling
- Estimating
- Designing
- Working
- Unit Testing
- Peer Review

- Resolved
- Testing
- Failed
- Closed

Requested Field

The Requested field is set automatically based on the login id of the requestor.

Priority Field

By Default, the priority is To Be Determined (TBD). Once an incident is assigned to a resource, a priority will be determined.

- 5 - TBD (to be decided by GeoFields)
- 4 – Low (not a priority to address)
- 3 – Medium (can be addressed later)
- 2 – High (should be addressed soon)
- 1 – Urgent (must be addressed immediately)

Assigned Field

By Default, an incident is automatically assigned to the Change Control Board (CCB). The CCB reviews all incidents and assigns them to the proper resource. The CCB serves as the focal point for change management and retains the authority for deciding which proposed changes actually get incorporated into a work product. The CCB may include individuals from Engineering (_SEQ), Quality Assurance (_QAQ), Product Management (_PMQ), Implementation (_IMQ) or Project Management. The CCB meets on a periodic basis or whenever a key change or group of changes requires consideration.

Severity Field

The Severity of the incident depends on the nature of the request. Reported bugs or problems with a product typically have a higher severity than enhancement requests.

- 5 – Cosmetic (change with no affect on work process)
- 4 – Confusing (is not directly affecting work process)
- 3 – Minor (problems in work process)
- 2 – Significant (impact on work process)
- 1 – Total Loss (of work process)
- Not Applicable (anything else)

Target Field

The Administrator assigns a default resource for each project. This is the person to most likely implement a request.

Category Field

This field summarizes the nature of the request. By Default, this field is set to Bug.

- Bug
- Enhancement
- Implementation
- Research

Modified Field

This field keeps track of who last modified the incident.

Description Field

The Description should describe the request in detail. Include 1. detailed steps how to reproduce the issue, 2. describe the results of that action, 3. detailed error message, or if applicable, what the result should have been. This will help the Project Team understand the nature of the request and enable us to reproduce an issue. For instance:

1. Description: Build 117, log into application as supervisor, create a new report, selecting Division Atlanta, District 120, Location Code Main-A....., Begin Inspection Station 50, End Inspection Station 100, validated both stations, then clicked Save button. (Steps performed).
2. Got an Oracle integrity constraint error. Application crashes when clicking OK. (Error due to performing those steps).
3. See attachment for detailed Oracle error. (exact error message).
Being as detailed in the description field as possible helps the project team trouble shooting problem requests and it helps understand enhancement requests.

Workaround Field




The Workaround field provides a description of a known workaround procedure until a request can be addressed.

Resolution Field

This Resolution field indicates a descriptive resolution to the request.

Documents Tab

Allye Duncan: Please enter new incident information and click insert.

General | **Documents**

Incident ID: [None]

Project: /GeoFields/Products/DF-Forms/DF-Forms 2.2


Found: Europa Build: Release: [None] Build: Track:

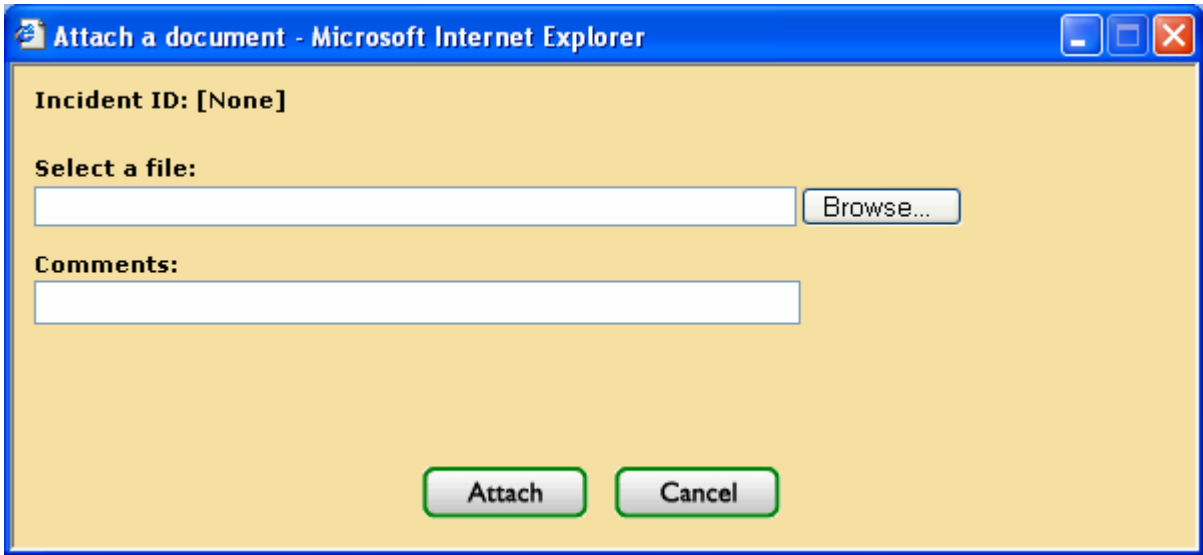
*Subject:

Name	Comments
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The Document tab allows user to attach documents and URLs to the current incident. These files are typically documents, screen shots, and links that provide supporting information about the Incident. The attached document will appear as a hyperlink.


To attach a file to an Incident:

1. Open the Incident and select the Documents tab.
2. Click **Add File**.
3. In the **Attach a Document** window, click **Browse** to locate the file you wish to attach.
4. Select the file and click **Attach**.
5. Select **Actions | Update** from the menu or click .



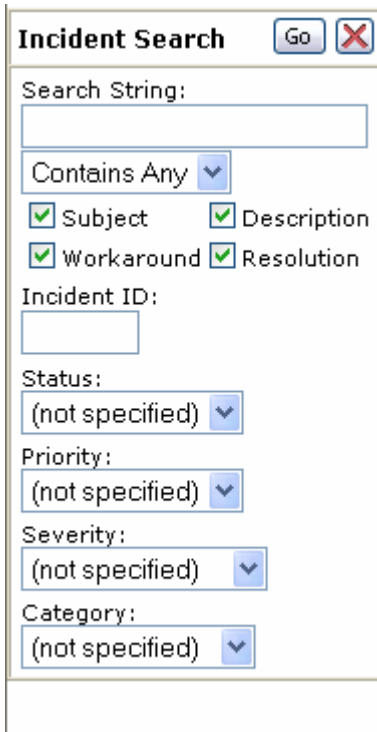
It is important that each document attached to an incident have a unique name. To create a unique identifier for the document, the file name could describe the problem, for example, ClickSaveError.jpg.

To attach a URL to an Incident:

1. Open the Incident document and select the Documents tab.
2. Click **Add URL**.
3. In the **Attach URL** window, type in the full URL.
4. Click **Attach**.
5. Select **Actions | Update** from the menu or click .

Searching Incidents

Incidents can be searched by keywords appearing in the Subject, Description, Workaround or Resolution fields. This keyword search can be further limited by selecting a Category, Status, Priority and/or Severity.









The screenshot shows a dialog box titled "Incident Search" with a "Go" button and a close button (X). The dialog contains the following fields and options:

- Search String:** A text input field.
- Contains Any:** A dropdown menu.
- Search Fields:** Four checkboxes, all of which are checked: "Subject", "Description", "Workaround", and "Resolution".
- Incident ID:** A text input field.
- Status:** A dropdown menu with "(not specified)" selected.
- Priority:** A dropdown menu with "(not specified)" selected.
- Severity:** A dropdown menu with "(not specified)" selected.
- Category:** A dropdown menu with "(not specified)" selected.

To Perform a Keyword Search:

1. Select **View | Incidents** from the menu.
2. Select **Search** or click.
3. In the **Incident Search** window enter your keyword(s).
4. Select a Keyword search type from the drop-down menu (i.e. Contains Any).
5. Select the field(s) you wish to search.
6. Choose Category, Status, Priority, or Severity from the drop down menu if desired.
7. Click **Search**.

Incident Action Icons

Action	Icon	Description
Insert		Inserts a new GeoFields TRACK incident into the database
Update		Saves changes made to an existing GeoFields TRACK incident into the database
Refresh		Retrieves the last saved copy of a GeoFields TRACK incident from the database
Print		Opens the GeoFields TRACK Report Viewer, allowing you to print or export the item(s) you are viewing.
Send		Allows you to send the contents of the incident general tab as well as a direct link to the incident to an e-mail recipient
Search		Opens the GeoFields TRACK Search tool

