# SIMTracker Software

User Guide

**Version No. V2.1.7**

**6/01/2007**



Issued by Sim-1 Solutions Pty Ltd, Sydney, Australia www.sim1.com.au

# Document information

## Document Control

**Caution:** Printed copies are uncontrolled. Ensure you have the latest version of this document before doing any work in relation to it.

| | |
|---|---|
| **Project Name/No.** | SimTracker Software |

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# Document Overview

## Purpose

The purpose of this document is outline the use of the SimTracker from a user perspective.

## Background

The Sim tracker software is used to track Issues, Bugs, Change Request or any other task that has to be addressed by the company work force. This software not only helps in tracking the Issues but also measures turn around time and KPI information for each request. The following are the basic request that can be tacked by the software:

- Bug Incidents
- Change Request
- Enhancement
- Information
- Work Request

## Terms:

Company: This is referred to the organization that has purchased this product and is using SimTracker for managing its request by their staff and by their customers.

Customer: This is the entity that have purchased some products from the Company and have been provided a SIMTracker account to login and create request related to the products that they have purchased from the company or can raise any generic request based on the business terms set between the Customer and the company.

## Audience

This document shows functions that are available to the Customer via the Web portal so that Customer can raise request for the products that they would be using of a Company. This document is also useful for staff of the Company to raise the request in the similar way. The Staff does have additional privileges and those are only available in the Administration Guide.

## Roles and responsibilities

The following table describes the roles and responsibilities applicable to the use of the SIMTracker Software.

| Role | Responsibilities |
|---|---|
| **Administrator** | To setup accounts for customer portal logins and management of the system. |
| **Manager** | To review and action the customers request |
| **Customer** | To place request in the system based on needs and contractual agreements with the Company |
| | |

# Getting Started

In order to use the SIMTracker System, the user has to be provided with a SIMTracker login account by the administrator so that they can login and start using the software. Each account has specific roles and can only gain access to resources based on the roles. The Customer role has the least features and has the ability to only perform limited task.

Customer account features:

- Create request in the system
- Query and search on the status of the pending request raised by their account only
- Communicate with the Company by the Notes mechanism.
- Manage account information and profiles

## Logging In

On entering the website the user will be prompted with a login screen as shown in the fig 1.

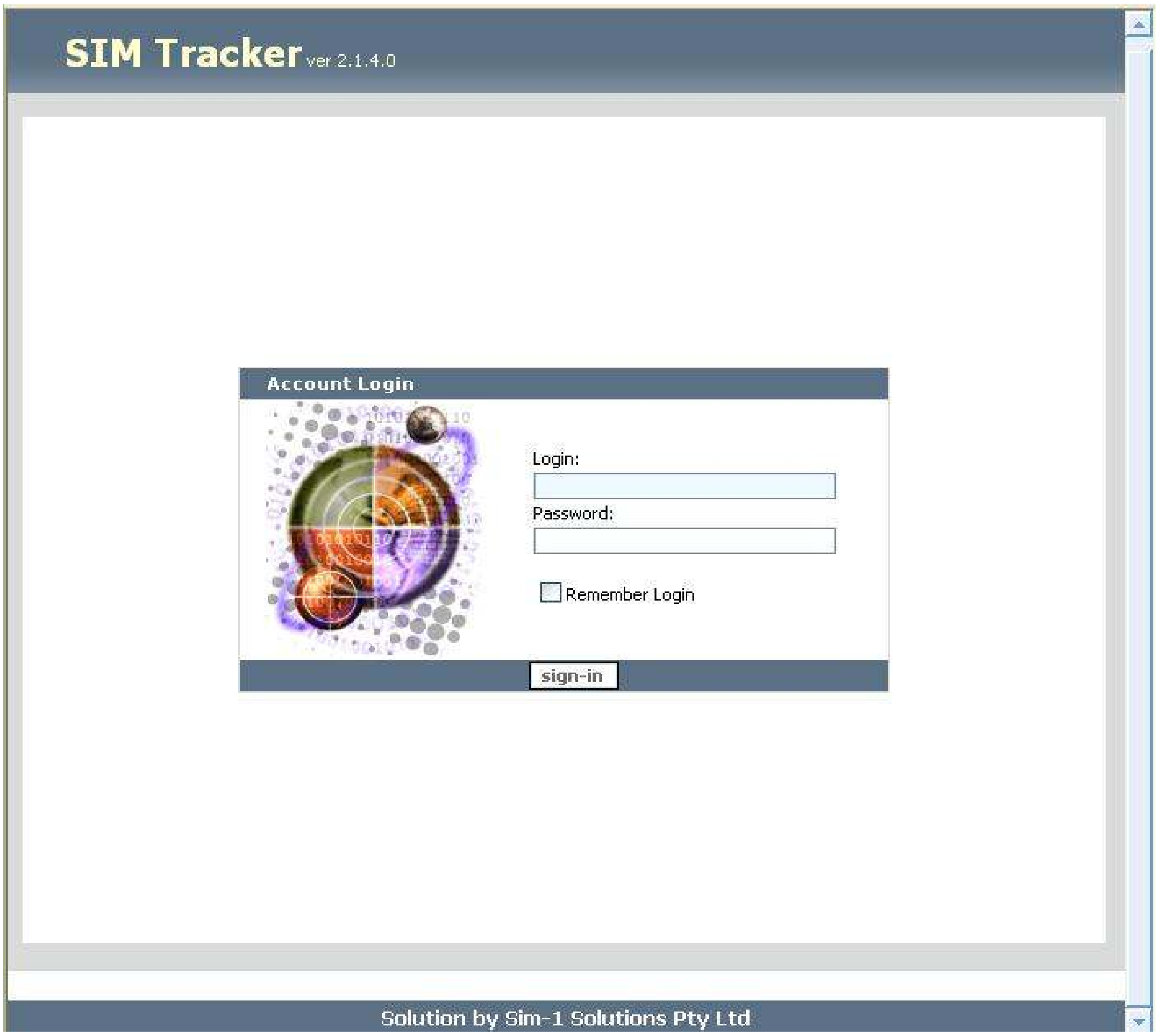


Fig 1: SIMTracker Login screen:

On logging into the system, the user with a customer role will get the following screen as shown in fig 2. The user can then search for existing Request in the system or can lodged new Request by clicking the “New” button.

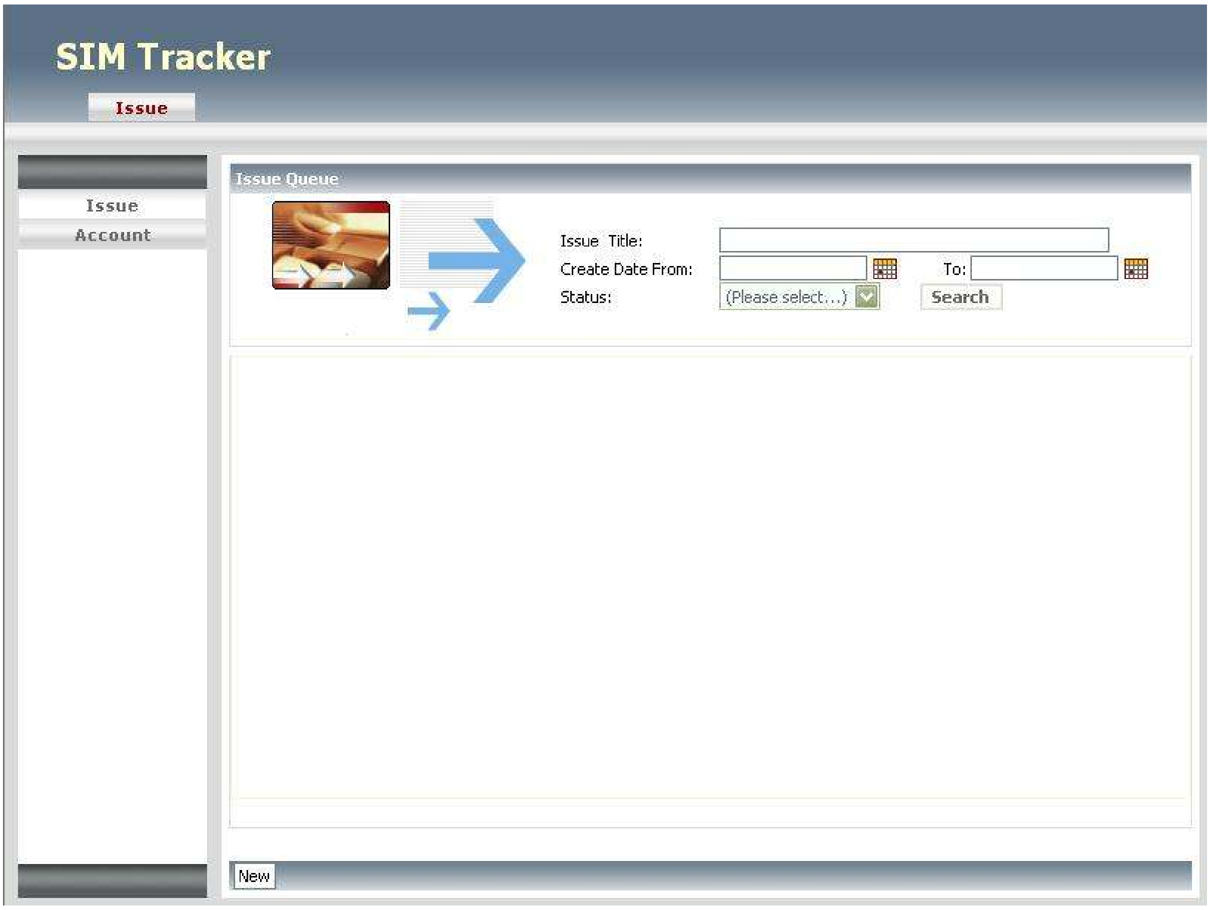


Fig 2: SIMTracker Main screen.

## Create Request

In order to lodge a new Issue Request in the SIMTracker system, click on the “New” button as shown in fig 2, at the bottom left of the screen. This will bring up the main request screen as shown in fig 3. This screen has the following fields that need to be filled.

1. Title: This is a mandatory field and is used to describe the request in brief, so that it can be searched and identified easily via the search functions.
2. Project/Product Name: This field is not mandatory and is used to classify the request against a Product/Project. If this field is selected the issue will be assigned automatically to the Product manager or the workflow for the product if it has been setup.
3. Type: This is used to classify the Request in the following basic types:
    a. Bug Incident
    b. Enhancement
    c. Information
    d. Work Request
    e. Task

The above are the default types part of the SIMTracker software, but can be increased based on the company's requirement of tracking.

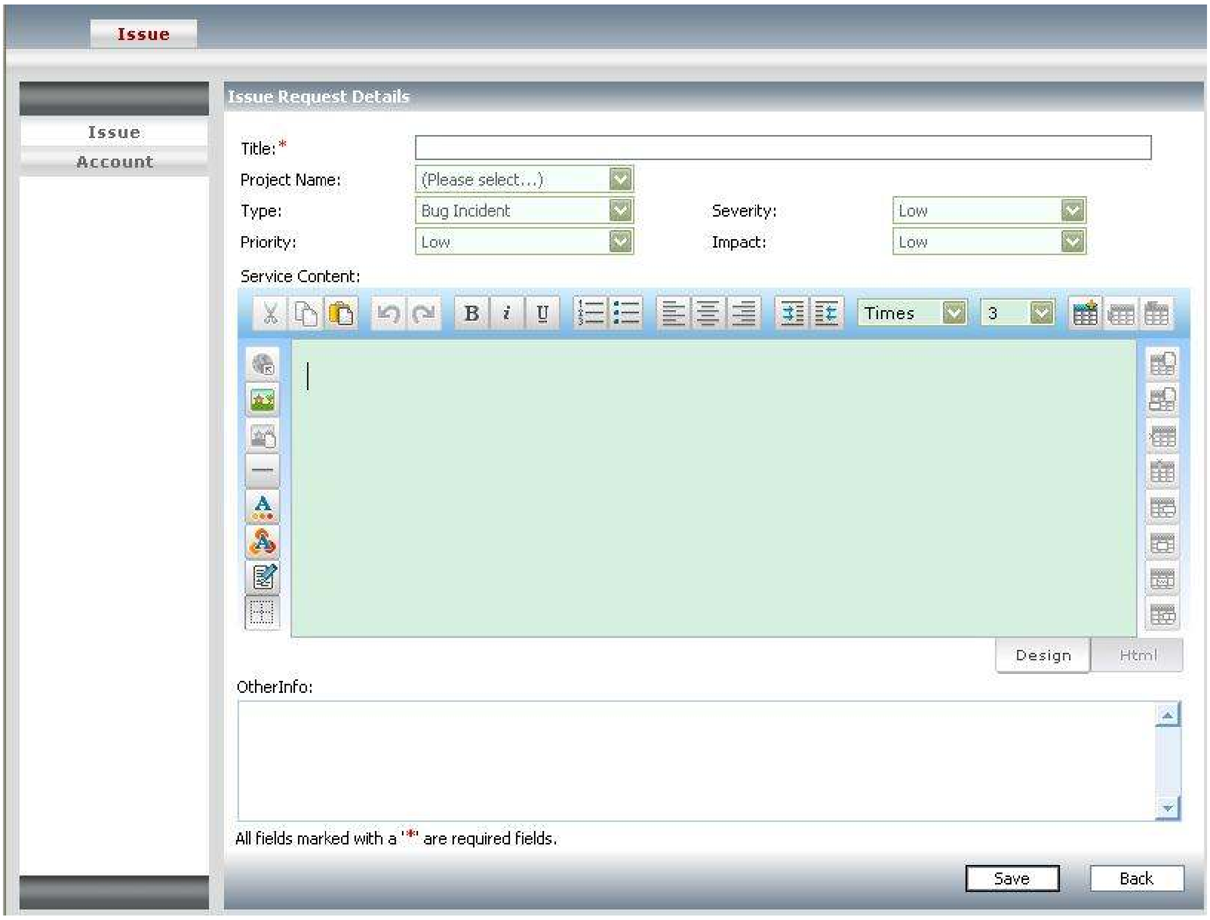


Fig 3. Issue creation screen.

4. Severity: This is to classify how critical this issue is and notifies the company on the turn around time to address and resolve the request.
5. Priority: This is to classify the how urgent and immediate this request has to be resolved with respect to other request of the same severity and impact.
6. Impact: This is to classify the impact of the request to the rest of the organization, business or system.
7. Service Content: This is basically an editor where all information regarding the issue can be uploaded easily with images and placed without any size or data restrictions. PS: All images have to be uploaded by the upload function on the screen before they can be placed in the editor, else the image will be referenced locally and will not be visible to other users.
8. Other Info: This is other information that you would like to get to notice to the helpdesk relating to the same issue.

On clicking the "Save" button the Request will be lodged into the system and following notifications will occur:

- An email will be send to the owner of the product manager or System manager based on the setup for the product notifying the user responsible to address the request.

- An email will be send to the requestor acknowledging that the request was successfully submitted in the system.

# Search

After logging into the application, the screen as shown in fig 4 will be presented. If the user account is a customer account the user will only be able to search all Request that have been submitted using their account. If the user account is any other account, they would be able to search all request that have are in the system.

## Search Screen

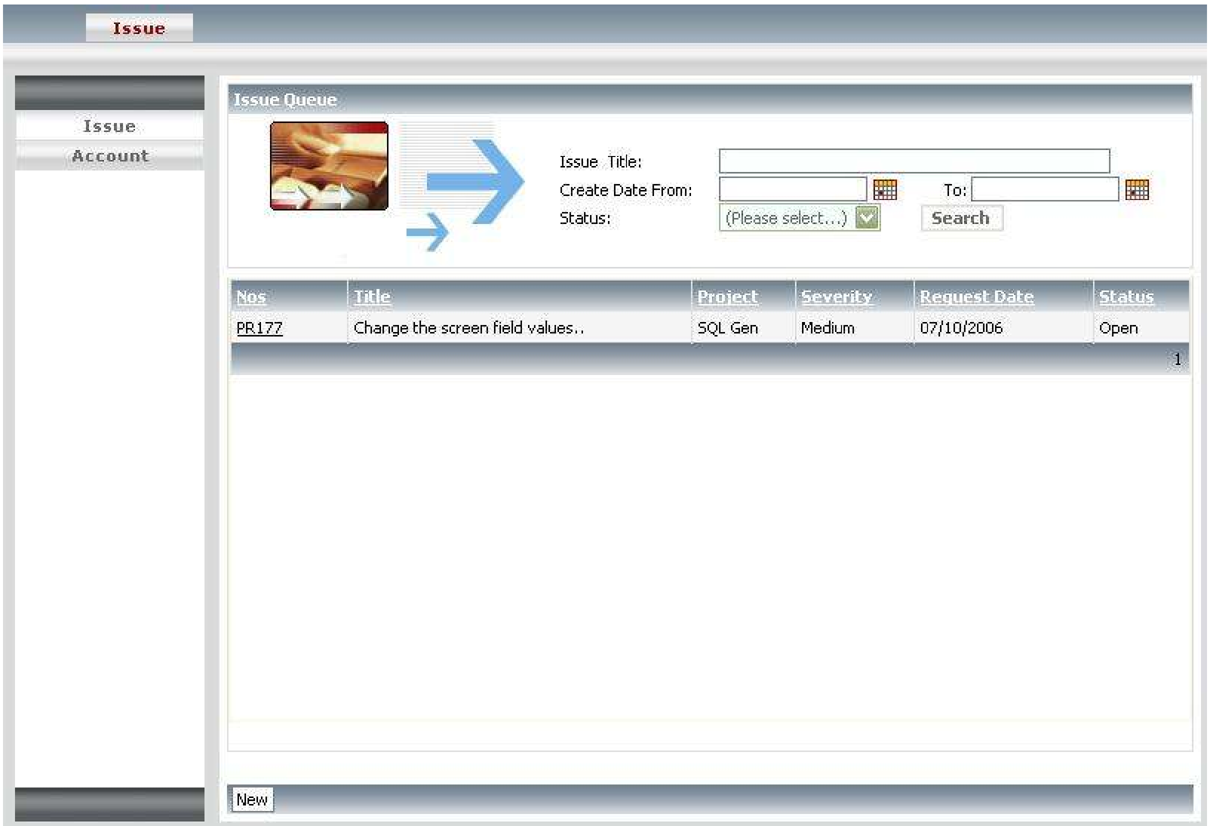


Fig 4: Search screen

Search Criteria:

- Title of the Request – This can be a wild card search and will search all titles containing the word or part of the word.
- Date From – The start date from which you would like to start the search. This is useful when one wants to search the most recent request.
- Date To – The end date to which one would like to end the search results. This is useful when one wants to search old request that have been submitted in the past months or years.
- Status – This is used to get the request by status, eg, one would like to search on all the opened request that are currently being actioned.  Or search all the request that have been closed in a particular period.

# Account Info

A user can update their account profile by clicking on the Account tab at the left main menu bar on the screen. This will bring up the account details that the user can update. This information is useful and can be used by the company and the customer to communicate with the information provided in these details.

## User Details

This is the information for a user account and provides other users in the system more information of the requesting user. The following are the information captured:

- First Name
- Last Name
- Email Address
- Phone Nos
- Mobile Nos
- Fax No

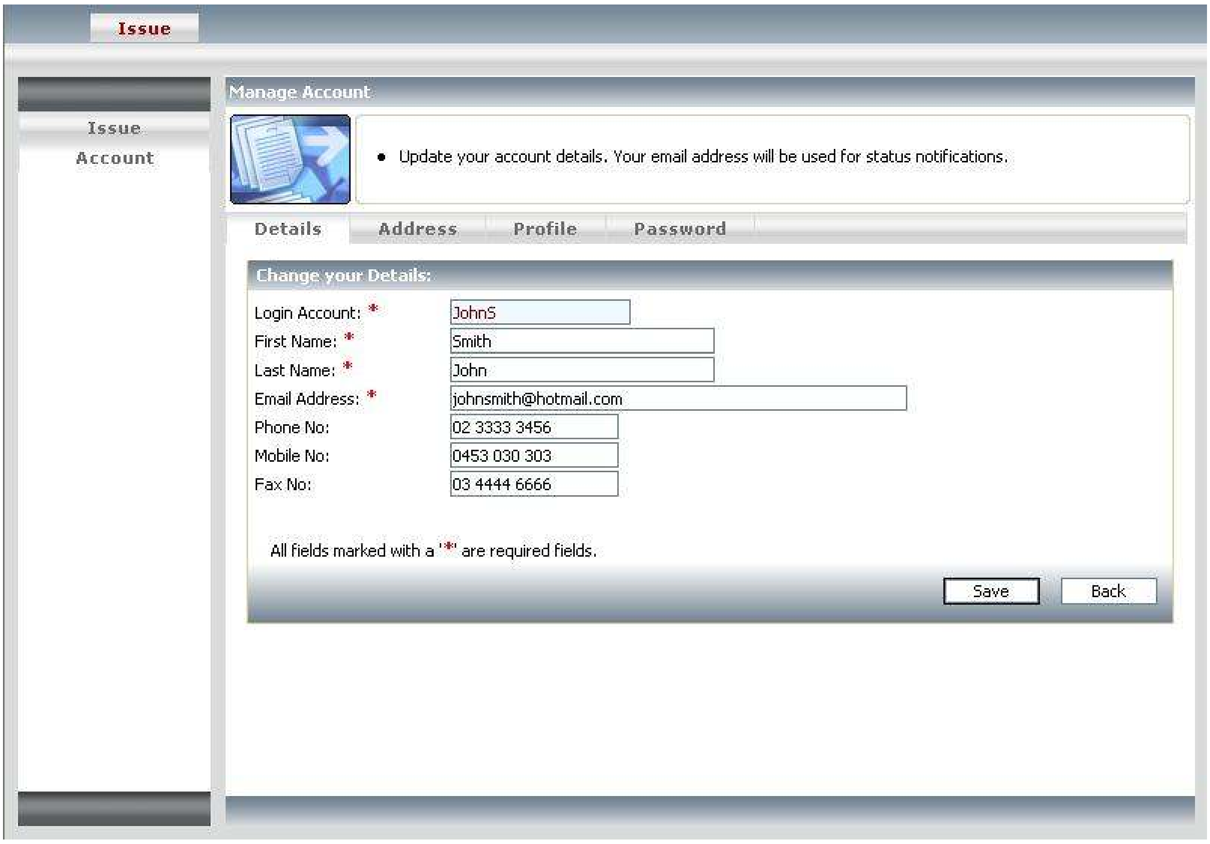


Fig 5: User Details screen

Each account can update their own details other than the Login Account.

To change the Address perform the following task after login:

Main Page ➔ Click Account Tab

## Address

The user can also update their address information that would be used for communication with the customer and company. The following as shown in fig 6 is the address information that is captured by the SIMTracker system.

To change the Address perform the following task after login:

Main Page ➔ Click Account Tab ➔ Click on the Address Sub Tab

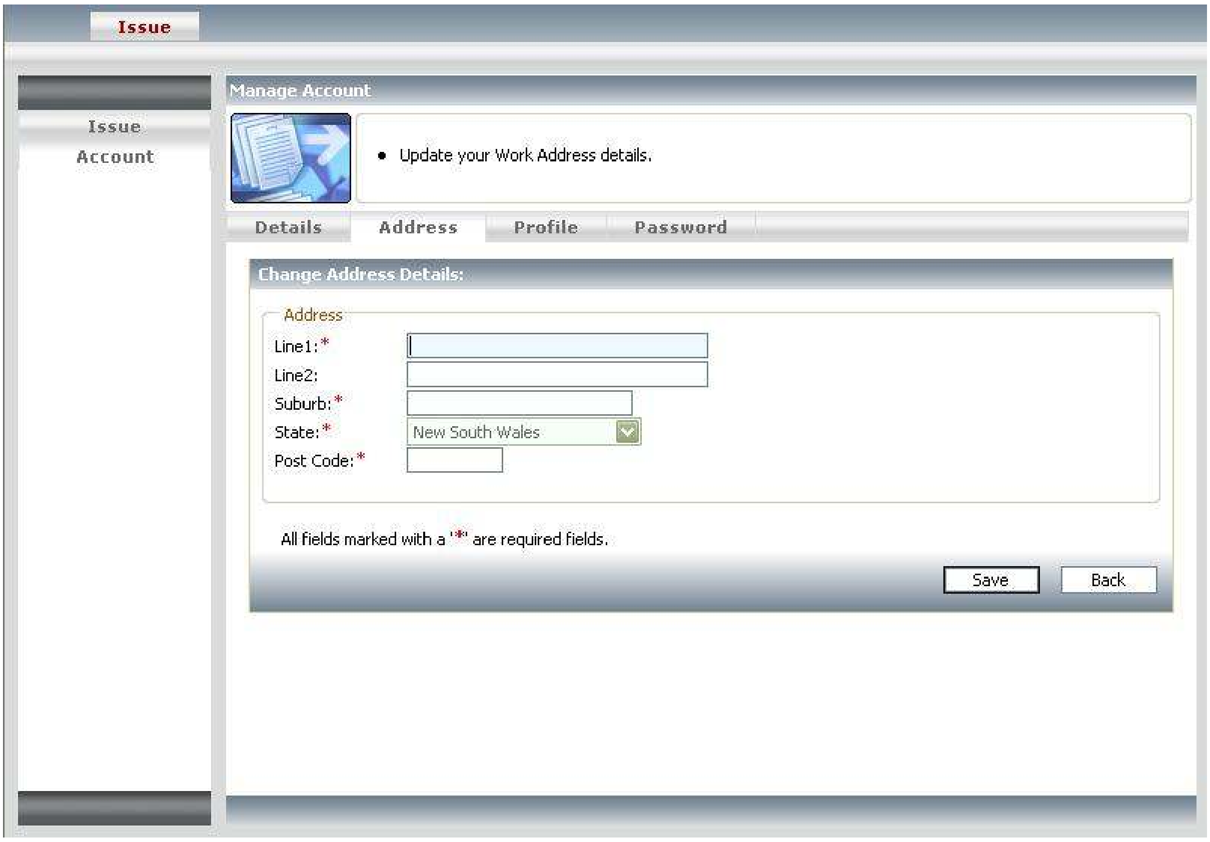


Fig 6: User Address information

## Profile

The user can change their profile in the system. The user can change their skin/theme information based on the colour choice and preference. These changes will save in the system and when the user logins in the next time, the same settings will be used.

The profile has also a language option, but currently the only language supported in English. Fig 7 shows the profile setting with the "Wallabies" skin selected.

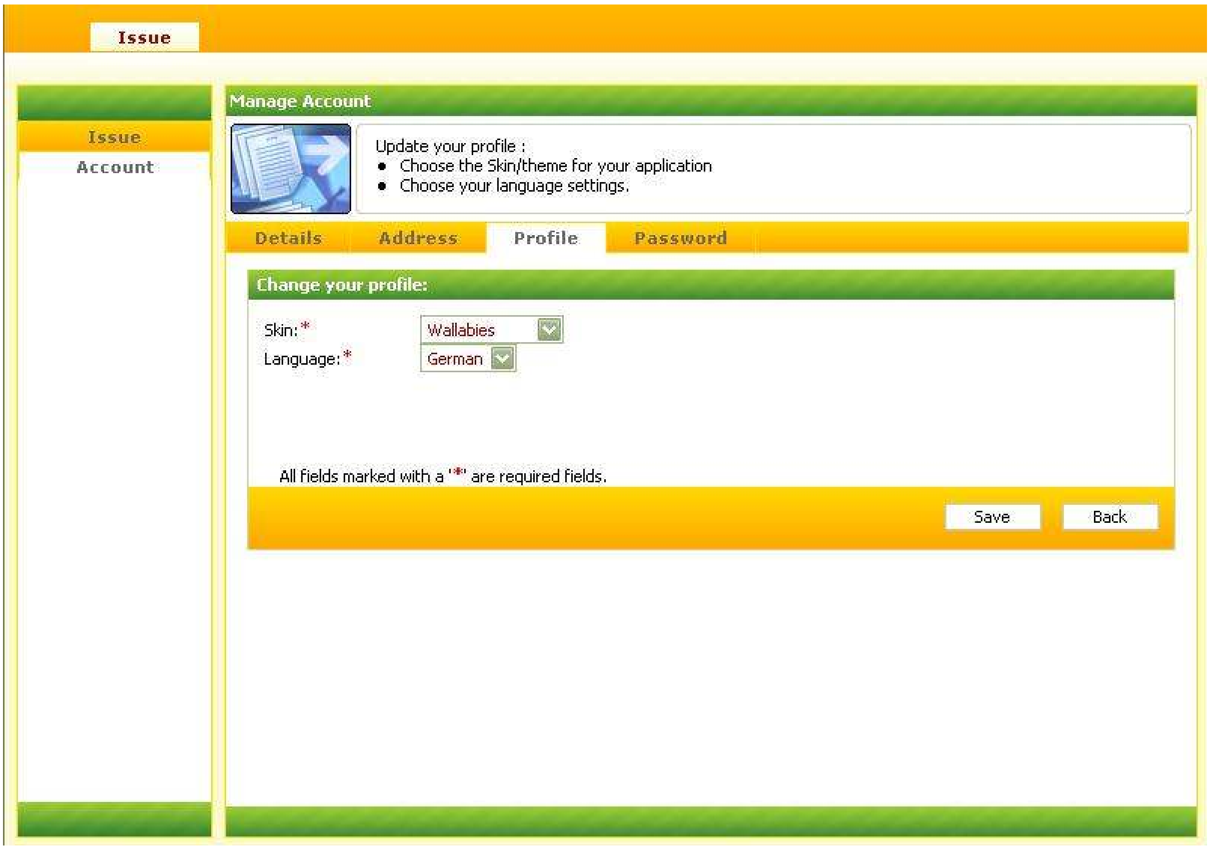


Fig 7: Profile screen : selected wallabies profile

To change the profile perform the following task after login:

Main Page → Click Account Tab → Click on the Profile Tab

## Password

This screen allows the user to change their password for security reason. It is a good practise to change your password every quarter and after the administrator has changed or reset your password. If the user has forgotten the password, the user would have to contact the administrator of the company for it to get reset.

Below is the screen to reset the users password.

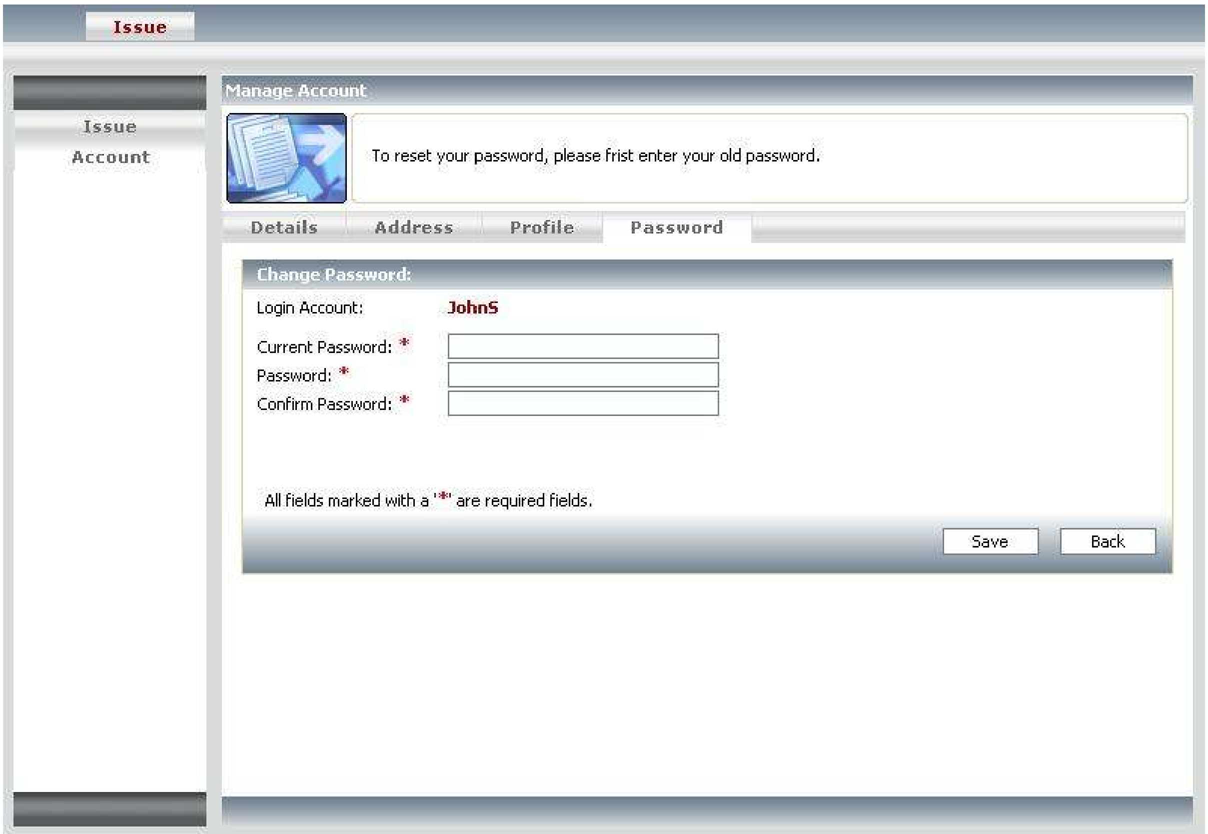


Fig 8: Change user password