

GeoCue Group Support

January 16, 2015

Revision 2.0

## Introduction

This technical note provides instructions for adding logical or 'Yes/No' steps to a GeoCue checklist. These types of steps can be useful for tracking work that is not linked to a particular production tool. A common example would be adding a "Ship Data to Client" step at the end of a workflow. They can be used at any point in a workflow where a Yes/No or Done/Not Done status has to be tracked independently of the actual work being done. Logical checklist steps are also commonly used in GeoCue's Distributed Project Management System (DPMS) when a step on a checklist is linked to a step in a subcontractor's workflow and simply needs to indicate if the work has been completed or not. Logical steps can also be used to track steps that have an extended "In Progress" requirement, for example to indicate tiles that are currently under QA/QC review.

## Requirements

Implementing logical checklist steps requires the use of Environment Builder to create the checklist step and then to add it to the desired checklist. Detailed instructions on using Environment Builder to customize your GeoCue environment are available from GeoCue Corporation. Experience with Environment Builder is recommended, but not required, to implement this technical note.

## A – Creating the Logical Checklist Step

To add a logical checklist step to your GeoCue environment, start GeoCue, open Environment Builder and select the 'Checklist Steps' tab (see

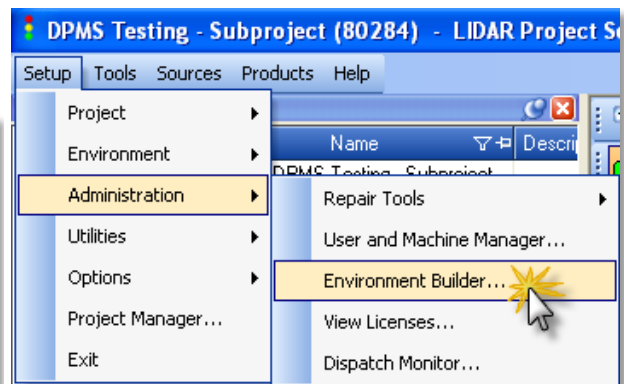


Figure 1 - Starting Environment Builder

Figure 1 and Figure 2 below). Click the 'New' button on the upper right side of the dialog. Note that if you select 'New' with an existing checklist step selected, GeoCue will create a new checklist step using a copy of the step you have

selected. In this example we want to start with a new, blank checklist step, so be sure no checklist step is selected before you click 'New'.

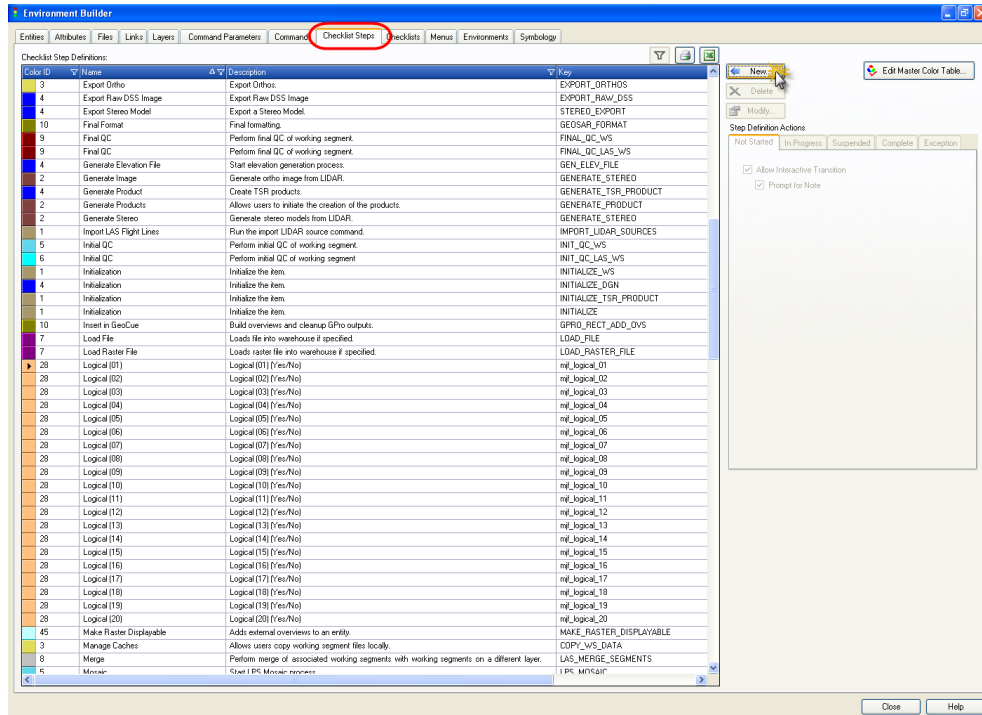
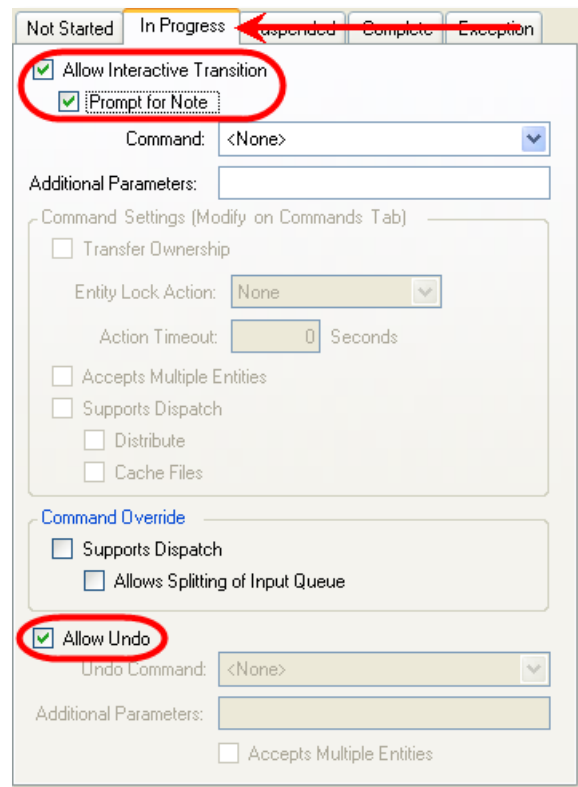
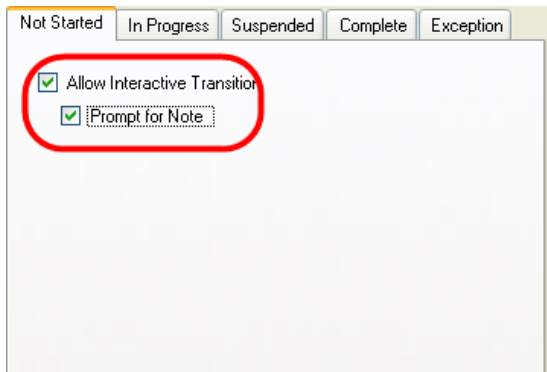
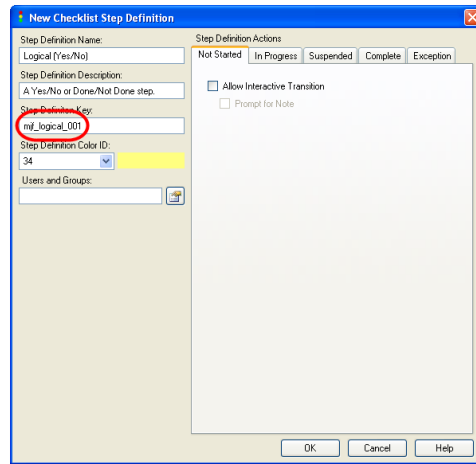
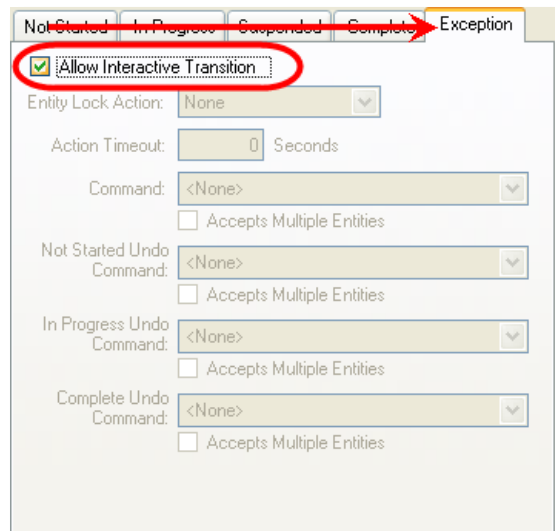
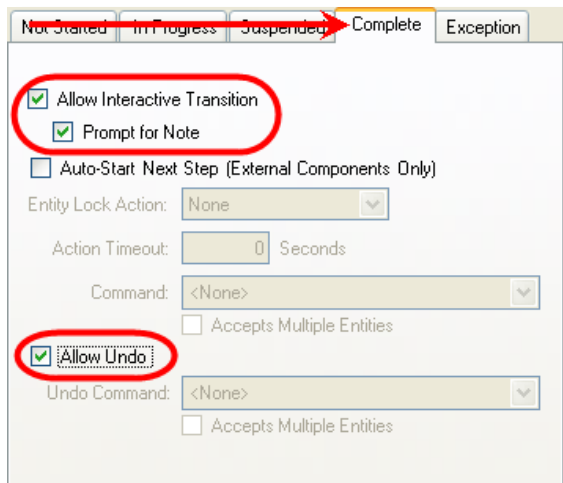
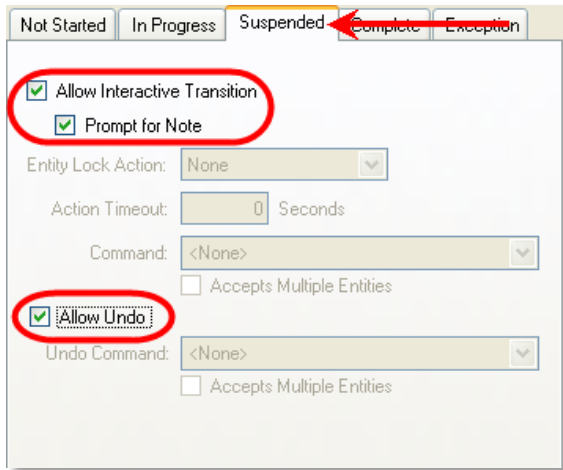


Figure 2 – Creating a New Checklist Step in EB

Fill in the 'New Checklist Step' dialog as shown below. Note that you will need to assign this new checklist step a unique 'Step Definition Key'. This can be any alphanumeric key, but is best set using a common naming scheme for your Environment Builder customizations, for example using a standard prefix. This allows you to run filters and queries against your customizations later.





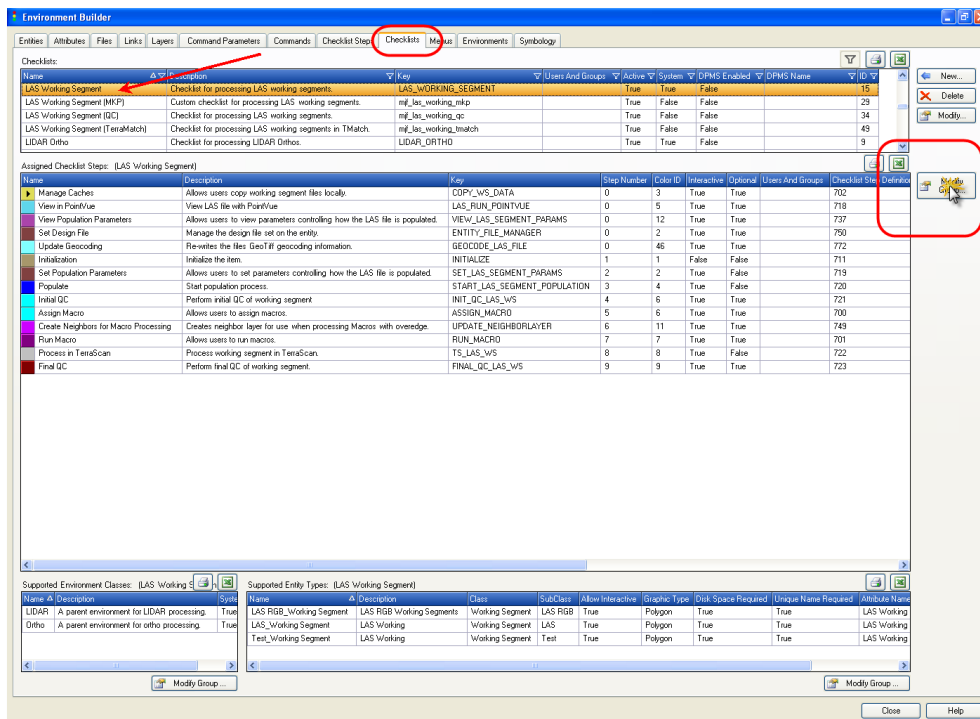
When finished, click 'OK' to add the new checklist step to the GeoCue environment. Note that the above configuration enables the user to set the new checklist step to any of the five GeoCue production states; 'Not Started', 'In Progress', 'Suspended', 'Complete' or 'Exception'. If you need a step that has only two states, for example 'Not Started' and 'Complete', simply uncheck the 'Allow Interactive Transition' box for the states you want to disable.

If you anticipate needing several logical 'Yes/No' steps on a checklist, make several additional steps by selecting the new step and clicking 'New'. This will create a copy of the selected step. You will need to

assign a unique key to each checklist step you create since each step on a given checklist must be unique.

## B – Adding the Step to an Existing Checklist

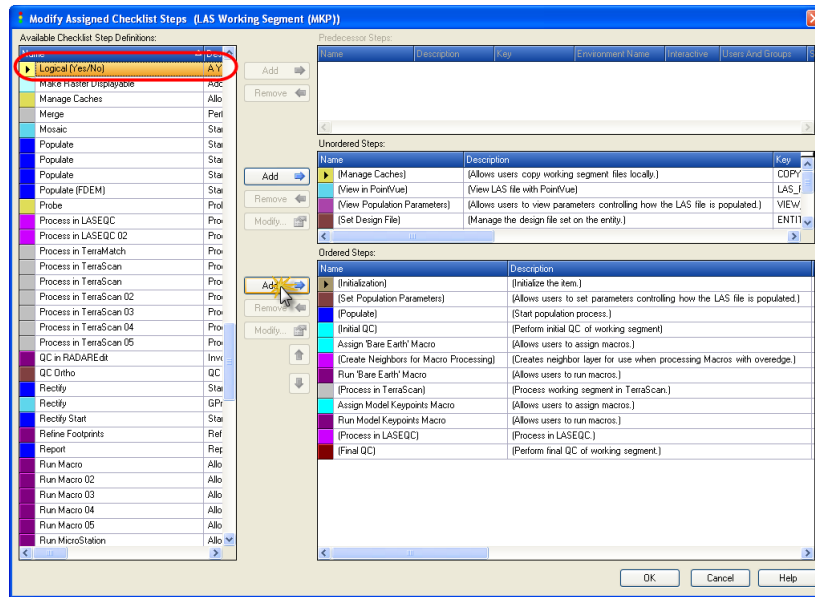
Next you need to add the logical step to your existing checklist. For example, we will add a “Data Shipped” step to the end of an LAS Working Segment checklist. Select the ‘Checklists’ tab in Environment builder. Scroll the top window to the checklist you wish to modify, select it and then click the ‘Modify Group’ button on the right.



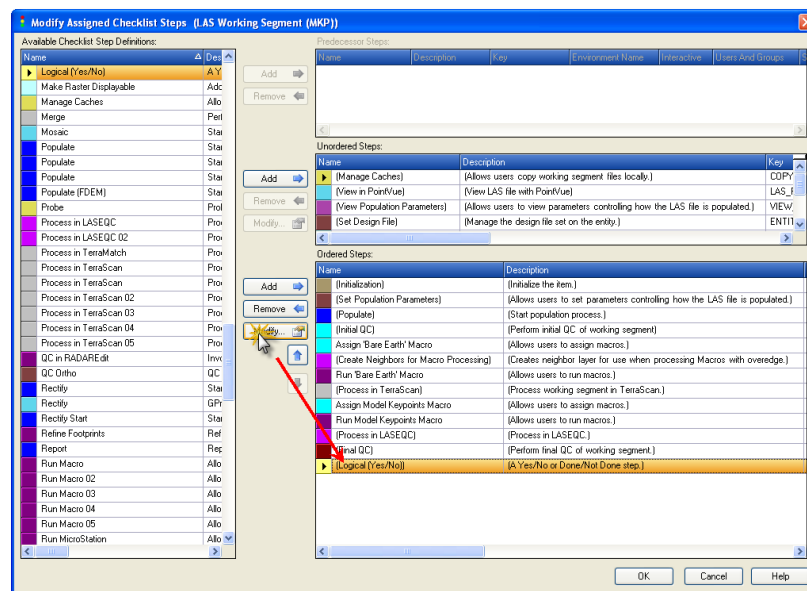
This will bring-up the ‘Modify Assigned Checklist Steps’ dialog. Scroll the window on the left to locate the new checklist step you just created. Select it with a left mouse click. Click the ‘Add’ button besides the list of current checklist steps. The new step will be added at the bottom of the checklist. You can use the Up/Down arrows to change the order of steps.

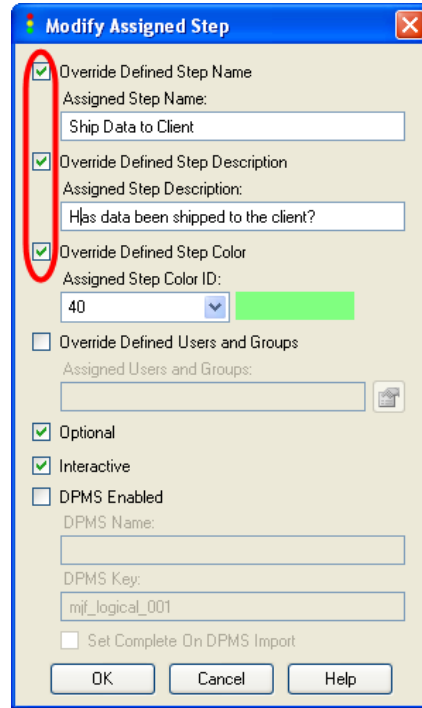
# CueTip

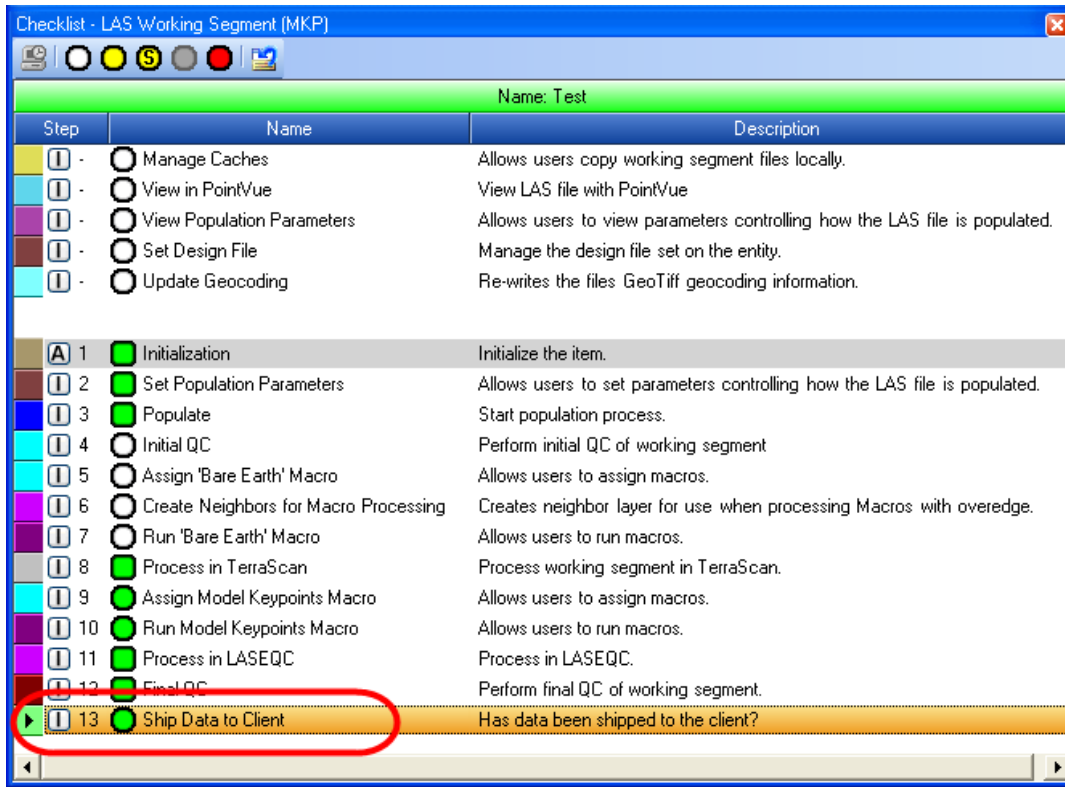
## Adding Logical ('Yes or No') Steps to a GeoCue Workflow



Once the new step is added and in the right position, you can use the 'Modify' button to customize it for this specific checklist, for example to change the name and color.







For information on this CueTip, contact:

GeoCue Group Support  
 GeoCue Group, Inc.  
 9668 Madison Blvd., Suite 202  
 Madison, AL 35758  
[support@geocue.com](mailto:support@geocue.com)  
 +1-256-461-8289



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<http://support.geocue.com>