

Coursebook



GoPro.net
Version I

First edition (April 2004)

This edition is for version 1 of **GoPro.net** and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Contents	3
1 Introducing GoPro.net	7
1.1 Yes, but can it make coffee?	7
1.2 A Day In The Life	8
2 User Interface	11
2.1 Logging in	11
2.2 Overview	12
2.2.1 Navigation Pane	13
2.2.2 View pane	14
2.2.3 Action bar	16
2.2.4 Search panel	17
2.2.5 Subview pane	17
3 Registration	21
3.1 The 3 Musketeers	21
3.1.1 The Organisation	22
3.1.2 The Contact	24
3.1.3 The Individual	26
4 Cases	29
4.1 Starting a Case	29
4.2 Phases	31
4.2.1 Phases in sequence	31

5	Working in GoPro.net	33
5.1	Memo	33
5.1.1	The Memo Form	34
5.2	E-mail	34
5.2.1	The E-mail Form	35
5.3	Documents	36
5.4	GoPro.net Desktop	38
5.4.1	Import a file	38
5.4.2	Import an E-mail	39
5.5	Working with folders	40
5.6	Odds and Ends	42
5.6.1	Notifications	42
5.6.2	Link contact to a Case	43
5.6.3	Add Involved party to a Case	43
6	Searching	45

What is GoPro.net? - The short version

GoPro.net is:

- A Client Management system.
- A Case Processing System for Case workers.
- A Document Management and Project Control application, providing control over all documents and an overview of cases and projects.
- An Online Service where citizens and customers can send in applications for public services, monitor the status of their applications and communicate with public servants (case workers).

About this Coursebook

This Coursebook is for Case workers attending courses in using the GoPro.net system. It is divided into the following chapters:



- Chapter **1 Introducing GoPro.net** is an imaginary story of a Case worker and a Citizen using GoPro.net.
- Chapter **2 User Interface** describes the user interface and the various parts of **GoPro.net**.
- Chapter **3 Registering clients** describes how to create Client records for Organisations, Contacts and Individuals.
- Chapter **4 Cases** describes how to create and work with Cases and Phases.
- Chapter **5 Working in GoPro.net** describes how to create and work with communications documents and introduces some additional functions of **GoPro.net**.
- Chapter **6 Searching** describes how to locate items in **GoPro.net**.

This Coursebook focuses on the basic features of the system. For further information see the **GoPro.net** User's Guide. It contains a fuller description of the system components and helps users gain a better understanding of the system when they have finished this course.

Chapter 1

Introducing GoPro.net



When this chapter is finished you should have a general idea of the purpose and uses of GoPro.net.

1.1 Yes, but can it make coffee?

GoPro.net:



- stores information about organisations, contacts and individuals, such as phone and fax numbers, and physical-, e-mail- and Internet addresses.
- stores all communications and relevant documents connected with your clients.
- gives you the ability to set up projects (Cases) and gather all relevant information regarding the project in one place.
- provides the means to give external parties access to your Organisation's website with automatic communication options.

1.2 A Day In The Life

The Cast

Suzanne Heinlein – Suzanne is manager of Human Resources for Windermere Town. Her job is among other things to oversee job applications. Now she has posted a listing for an assistant for herself, on Windermere Town’s website.



John B. Clarke – John has just graduated in Office Administration from Windermere Business School and is looking for a job.

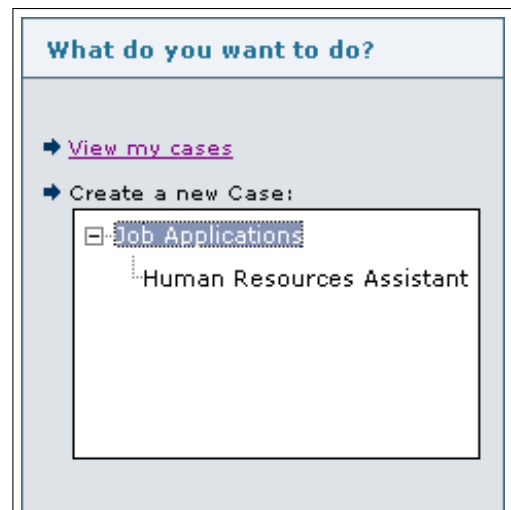


The Story

SUNDAY 17:53



Following his graduation **John B. Clarke** is looking for a job suited for his qualifications. As all residents of Windermere Town he has his own username and password for accessing Windermere Town’s website. He accesses the website and goes through the job listings. He finds a listing for the job of Human Resources Assistant. He accesses the job application form, fills it in and submits it. He includes his resume as an attachment.



MONDAY 09:33



Suzanne opens her GoPro.net workspace. Job applications filled in on the Web appear in her workspace as Cases. Among other cases awaiting her, she sees **John's** application.

Cases				
	Name	Status	Case number	Created
	Sales Initiative	In progress	200402-01	12/02/2004
	Euston Place contracts	In progress	200402-03	14/02/2004
	Staff Management	In progress	200402-04	15/02/2004
	Human Resources Assistant	In progress	200403-03	12/03/2004

Suzanne goes through **John's** application and changes it's status to 'Preliminary approval'. Applicants whose applications do not meet the minimum requirements, receive a rejection. Their cases' status is automatically changed to 'Closed'.

MONDAY 13:06



John has entered the name of his Business School professor and a former employer for references. **Suzanne** calls both. She writes down her notes from the calls in a memo which is stored under **John's** case in GoPro.net. Satisfied with what she hears during her calls, she subsequently leaves a memo for **John** to come in for an interview the following Thursday.

[-]	25/03/2003 - Phase: Application - Finished (A.A.)
	[-] 28/03/2003 - Memo: Application receipt - Closed (A.A.)
[-]	28/03/2003 - Phase: Follow-up - In progress (A.A.)
	[-] 28/03/2004 - Memo: John Frey - Applicant reference - Closed (A.A.)
	[-] 28/03/2003 - Memo: Paul Ashworth - Applicant reference - Closed (A.A.)

MONDAY 19:44



John checks his Citizen's account and is pleased to see the memo from **Suzanne**. He replies to the memo confirming the interview.

THURSDAY 10:00



John meets **Suzanne** for the interview, which both feel goes well. Suzanne knows she has found the right person for the job and writes a memo regarding the interview and sends a notification about it to her immediate superior.

THURSDAY 15:25



Suzanne meets with her superior and a staff representative to discuss the applications of the three remaining applicants. For her **John** is the clear favourite and the others agree. **Suzanne** leaves a memo for **John** informing him of the decision and asks whether he can start work the following Monday.

FRIDAY 11:07



John calls **Suzanne** to let her know that he accepts the position and will start Monday morning.

MONDAY 08:45



John arrives for his first day at his new job.

Chapter 2

User Interface



When this chapter is finished you should be able to ...

- ... recognize the main elements of the GoPro.net user interface.
- ... navigate in GoPro.net
- ... display, view and sort information for best results.

2.1 Logging in

GoPro.net is accessed through a Web browser.

The login window is displayed on the right. Enter your username and password. The password is displayed as dots for security reasons. Click on **Sign in** to access GoPro.net.

GoPro.net

Login

User name: helenm

Password: ●●●●●●●

Sign in

MSIE 6.0+ OK

After successfully logging in the Welcome screen is displayed.



The welcome screen gives access to the 3 Workspaces for Case worker, Citizen and Administrator.

Case worker area. You can either enter the Case view or the Clients view.

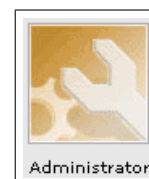
See [2.2.1](#) for further information.



Citizen area. The area where citizens or customers can access applications and similar forms.



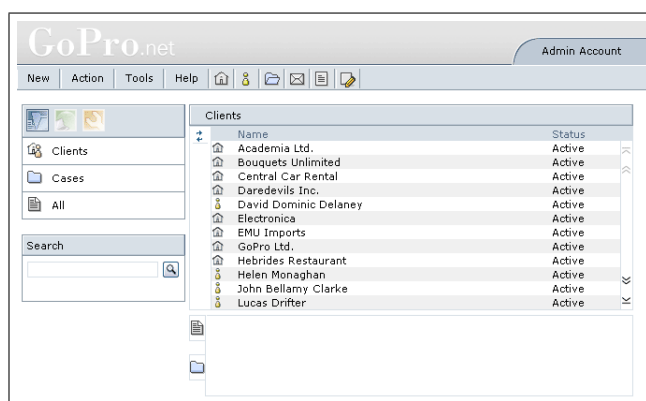
Administrator area. This area is for Administrators for setup and configurations.



The workspaces are discussed further in the next section.

2.2 Overview

On the right is an overview picture of GoPro.net. The following sections explain the user interface in detail.

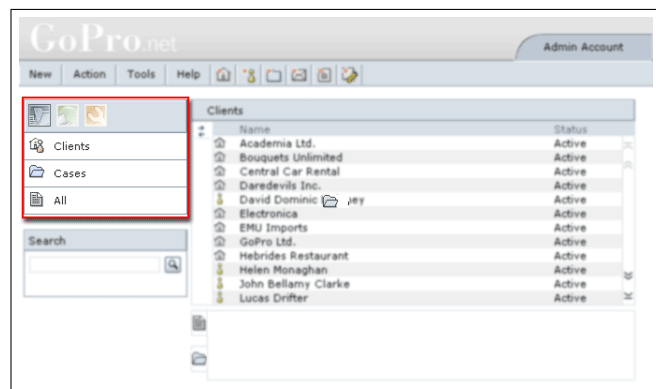


2.2.1 Navigation Pane

The Navigation pane contains two types of elements:

Workspace buttons – **1**


Views – **2**




1 The Workspace buttons are for:



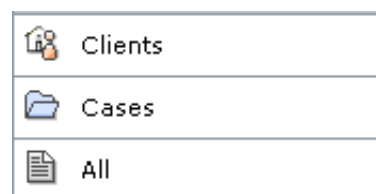
 Case worker – Highlighted above since it is the active workspace.

 Citizen – Greyed out above since it is inactive. Click on the button to access the Citizen's workspace.

 Administrator – Greyed out above since it is inactive. Click on the button to access the Administrator's workspace.

2 The Views are located beneath the Workspace button. The selected view is displayed in the View pane.


See section [2.2.2](#) for more about the View pane.



The available Views are:

 Clients – Displays Organisations and Individuals.

 Cases – Displays Cases.

 All – Displays Organisations, Individuals, Cases, E-mail, Documents and Memos.



Exercise – Views

- 1 Click on the views in the Navigation pane to display different content in the View pane.

2.2.2 View pane

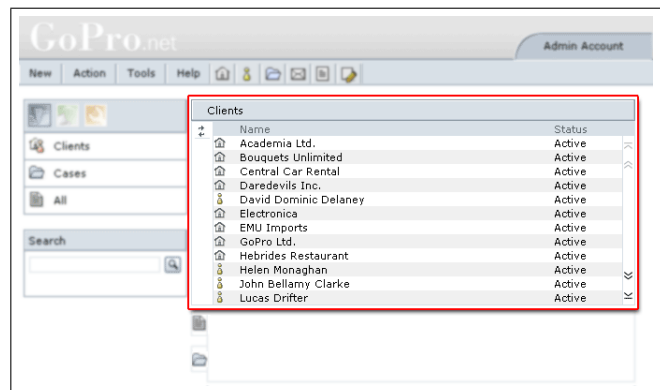
The View pane displays the Records and documents stored in GoPro.net.

The view selected in the Navigation pane determines what is displayed. in the View pane
The options are:

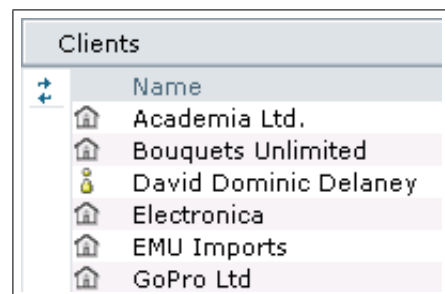
Clients **1**

Cases **2**

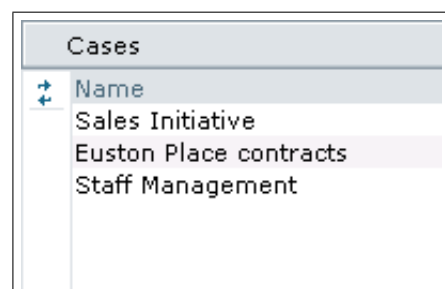
All **3**



1 Clients – displays all Organisations and Individuals in the View pane as shown on the right.



2 Cases – displays all Cases in the View pane as shown on the right.



3 All – displays all Organisations, Individuals, Cases, E-mail, Documents and Memos in the View pane as shown on the right.

All	
+	Name
	Week 3 meeting - discussion
	Draft for Contract
	Canteen
	Roma task list
	Financing
	Small Things Ltd.
	Academia Export Ltd.

Column sorting

All columns can be used to sort the content of the View pane.

Name ▾	Status	Case number	Created
Euston Place contracts	In progress	200403-03	18/03/2004
Sales Initiative	In progress	200403-04	18/03/2004
Staff Management	In progress	200403-01	15/03/2004

Click on a column to sort the content in alphabetical order.

Date columns are sorted by date and time, while number columns are sorted numerically.



Exercise – Sort columns

- 1** Go to the Cases view and click on the Name column. The content of the View pane is sorted by Case name in alphabetical order.
- 2** Click on the column again. The cases are now displayed in descending alphabetical order.

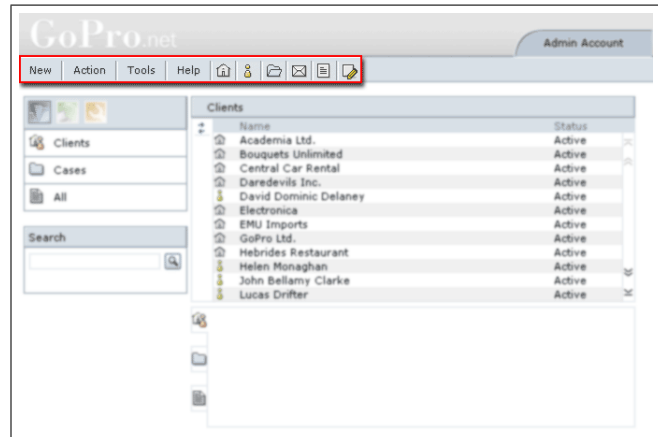
The View pane is further enhanced with the Subview pane. The functions and uses of the Subview pane are explained later in section [2.2.5](#).

2.2.3 Action bar

The Actionbar contains:

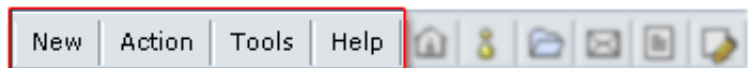
Menus **1**

Buttons **2**

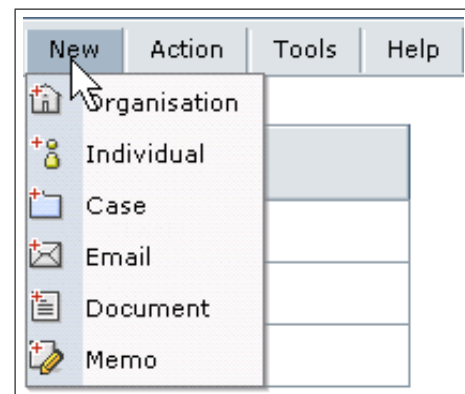


1 Menus

Contain all available actions:



Place the cursor above a menu item to expand it and display the menu actions.



2 Buttons

Contain the most common actions.



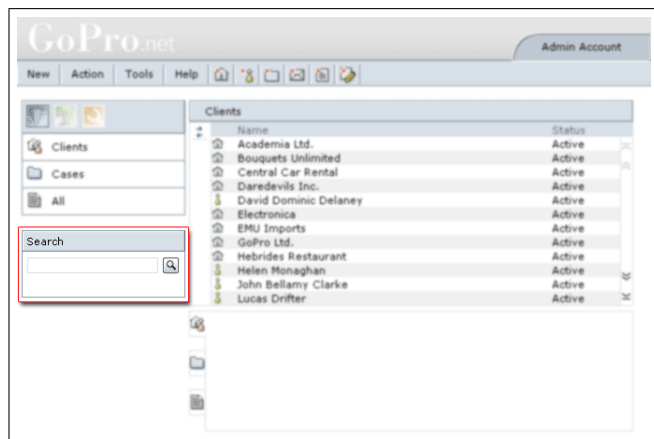
Place the cursor above a button to display a tooltip for the button.



2.2.4 Search panel

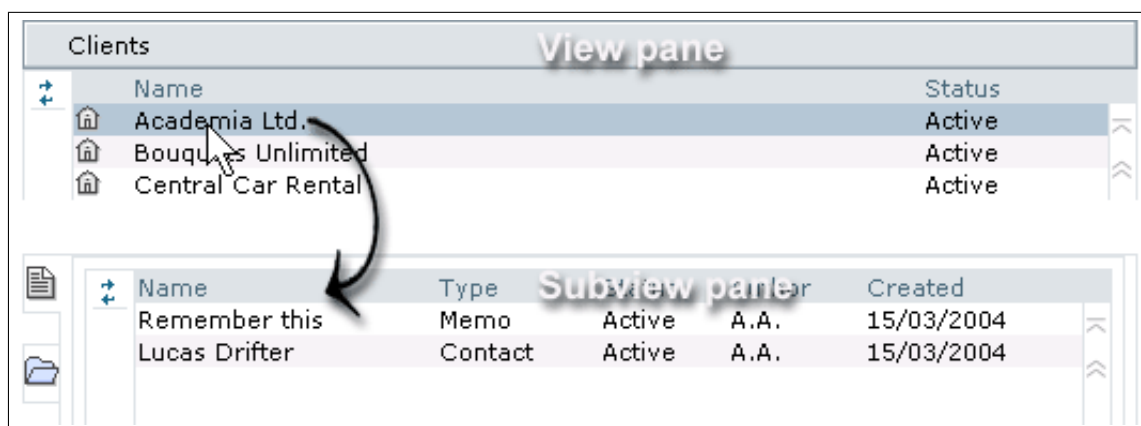
The search panel is used to locate items.

This is explained in chapter 6.



2.2.5 Subview pane

When you select a Record in the View Pane, be it a Client or a Case, the documents and records associated with it are displayed in the Subview Pane below.



Click on the Documents icon to see all documents related to the selection in the View pane. This subview contains additional options.



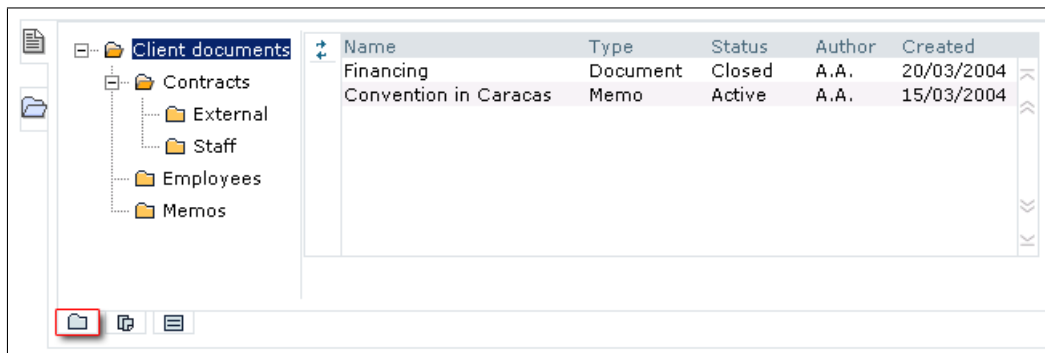
Click on the Cases icon to see all cases related to the selection in the View pane.

Subview Pane Sorting

Items in the Subview pane can be further sorted using the sorting options at the bottom.



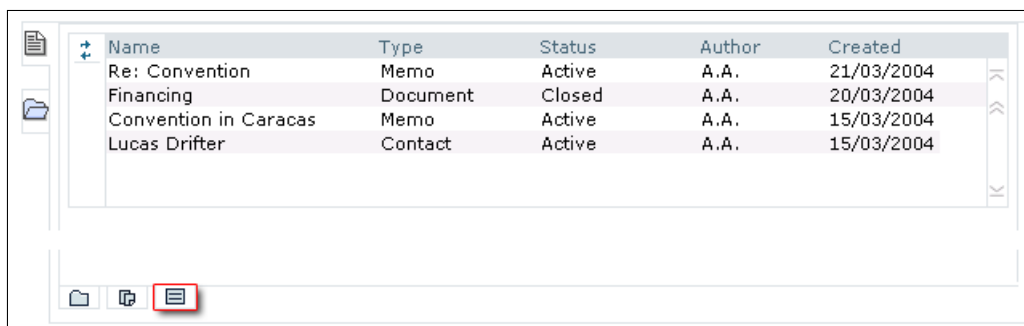
Click on the **Folder** icon to view and manage contents using folders.



Click on the **Hierarchy** icon to view and manage contents using a hierarchical view.



Click on the **List** icon to view and manage contents using a flat list.





Exercise – Sorting Options

- 1** Select a Client in the View pane, one that has a few contacts and documents, memos or e-mail in the subview.
- 2** Click on the Folder icon at the bottom to see the contents in a folder structure.
- 3** Click on the Hierarchy icon at the bottom to see the contents displayed in a hierarchy.
- 4** Click on the List icon at the bottom to see the contents displayed in a flat list.

Chapter 3

Registration



When this chapter is finished you should...

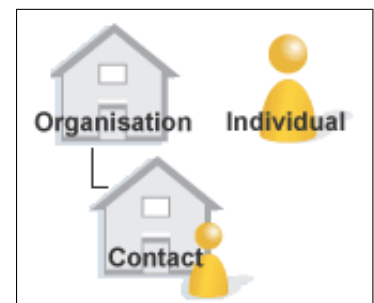
- ... be able to create and edit Client and Contact records.
- ... understand the similarities and differences between Organisations, Individuals and Contacts.

3.1 The 3 Musketeers

When processing a Case you are usually dealing with one or more clients or contacts. For the Case processing to work smoothly it is necessary to have a thorough registration of the involved clients (organisations or individuals) and contacts.

These are:

- **Organisations** – Organisations, companies or institutions.
- **Contacts** – Employees of organisations, companies or institutions.
- **Individuals** – Registered Citizens.

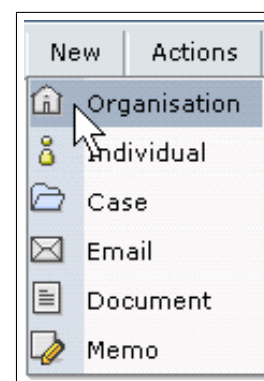


3.1.1 The Organisation

Organisation is the collective noun for private companies or institutions, and public offices, agencies or institutions.



To register a new **Organisation**:
Place the cursor above **New** in the menu and select **Organisation**.



The Organisation record

The Organisation record contains 4 tabs:

Organisation – General information about the Organisation such as Name, Phone number, and Addresses.

Categorisation – Information about Account manager and Type of business.


Documents – Displays the items shown in the Subview pane when the Organisation is selected in the View pane.

History – Shows creation date and changes made for the Organisation.

New Tools

Active tab Inactive tabs

Organisation Categorisation Documents History



Organization
 Created: 24/03/2004
 Modified: 24/03/2004
 Author: Admin Account
 Modified by: Admin Account

Required field

Status: Active

ID number:

*** Name:**

Language: English (United Kingdom)

Phone number:

Street name:

Street number:

Floor:

Post code:

City:

State:

Country: UNITED KINGDOM

Email:

Comments:

OK Cancel



Exercise – Register an Organisation

- 1 Create a new organisation.
- 2 Enter the Organisation's name and other required information.
- 3 Save and close the record.
- 4 Verify that the Organisation has been created by locating it in a view.

The Organisation record can now be used as a starting point for creating and storing information related to the registered Organisation.



Exercise – Edit an Organisation

- 1 Open the Organisation record.
- 2 Click on the Edit button.
- 3 Enter your changes or additions.
- 4 Save and close the document.

3.1.2 The Contact

A *Contact* is an employee of an Organisation.

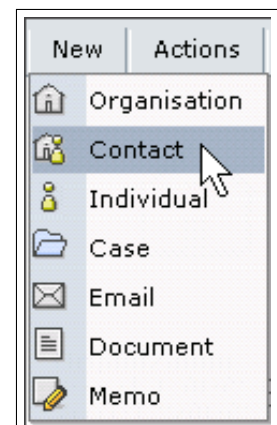


An organisation may have a phone number and a physical as well as an e-mail address. It is however rare to communicate directly with an organisation. Usually you deal with people employed with the organisation. These are known as Contacts on GoPro.net.

Contacts are registered from within the Organisation record.

To create a new **Contact**:

Open the Organisation record. Place the cursor above **New** in the menu and select **Contact**.



The Contact record

The Contact record contains 4 tabs:

Contact – General information about the Contact such as Name, Phone number, and Addresses.

Organisation – Shows the employer (Organisation) of the Contact.

Categorisation – Information about Account manager.

History – Shows creation date and changes made for the Organisation.

The screenshot shows a web application interface for managing contact records. At the top, there are 'New' and 'Tools' buttons. Below them is a navigation bar with four tabs: 'Contact', 'Organisation', 'Categorisation', and 'History'. The 'Contact' tab is selected. On the left side, there is a house icon and a person icon, followed by the text 'Contact' and its metadata: 'Created: 25/03/2004', 'Modified: 25/03/2004', 'Author: Admin Account', and 'Modified by: Admin Account'. The main area contains two columns of form fields. The left column is titled 'Information' and includes fields for 'ID number', 'First name', 'Middle name', '* Last name', 'Email', and 'Phone number' (with a plus icon and a minus icon). The right column is titled 'Communication' and includes fields for 'Status' (set to 'Active'), 'Streetname', 'Streetnumber', 'Floor', 'Postcode', 'City', 'State', 'Language' (set to 'English'), and 'Country' (set to 'UNITED KINGDOM'). At the bottom of the form is a 'Comments' text area and 'OK' and 'Cancel' buttons.



Exercise – Register a Contact

- 1 Open an Organisation and create a new Contact.
- 2 Enter all relevant information.
- 3 Save and close the record.
- 4 Verify that the Contact has been created by locating the Organisation in the View pane. The Contact should be displayed in the Subview pane.

3.1.3 The Individual

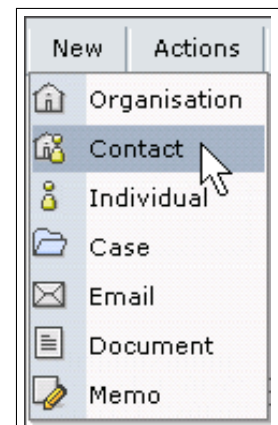
An *Individual* is a person not affiliated with an organisation.



IMPORTANT! When a person is registered as a Contact, an Individual record for that person is also created. It is important to understand the difference between the two.

To register a new Individual:

Place the cursor above **New** in the menu and select **Individual**.



The Individual record

The Individual record contains 4 tabs:

Individual – General information about the Individual such as Name, Phone number, and Address.

Categorisation – Information about Account manager and Type of business.

Documents – Displays the items shown in the Subview pane when the Individual is selected in the View pane.

History – Shows creation date and changes made for the Individual.

The screenshot shows a software interface for editing an individual's profile. At the top, there are tabs for 'New' and 'Tools'. Below that, there are sub-tabs for 'Individual', 'Categorisation', 'Documents', and 'History'. The 'Individual' tab is active, showing a yellow person icon and a summary of the individual's details: 'Created: 25/03/2004', 'Modified: 25/03/2004', 'Author: Admin Account', and 'Modified by: Admin Account'. The main form is divided into two columns: 'Identification' and 'Communication'. The 'Identification' column contains fields for 'Status' (set to 'Active'), 'ID number', 'First name', 'Middle name', '* Last name', 'Language' (set to 'English'), and 'Phone number' (with a plus sign and a minus sign icon). The 'Communication' column contains fields for 'Streetname', 'Streetnumber', 'Floor', 'Post code', 'City', 'State', 'Country' (set to 'UNITED KINGDOM'), and 'Email'. At the bottom of the form is a 'Comments' text area. The form has 'OK' and 'Cancel' buttons at the bottom right.



Exercise – Register an Individual

- 1 Create a new Individual.
- 2 Enter the Individual's name and other required information.
- 3 Save and close the record.
- 4 Verify that the Individual has been created by locating it in a view.

Organisations and Individuals are displayed in the **View pane**.

Contacts are displayed in the **Subview pane** when their Organisation is selected in the **View pane**.

An example of how Organisations, Individuals and Contacts are displayed:

The screenshot displays a software interface with two main panes:

- View pane:** A list of clients. The entries are: Academia Export Ltd., Academia Import Ltd., Anastasia's Water Ltd., Anne Elk (highlighted with a red box and labeled "Individual"), Annex Inc., and Anthea Lighting (highlighted with a red box and labeled "Selected Organisation").
- Subview pane:** A table of contacts for the selected organisation, Anthea Lighting. The table has columns for Name, Type, and Status. The entries are: Minutes (Memo, Closed), Re: Meeting - Rescheduling (Memo, Closed), Harold Bainbridge (Contact, Active) (highlighted with a red box and labeled "Contact - employee of Anthea Lighting"), Re: Meeting (Memo, Closed), and Marketing Strategy (Document, Closed).

Chapter 4

Cases



When this chapter is finished you should...

- ... have a general idea of the purpose and uses of Cases..
- ... be able to create and edit Cases and Phases.

Cases are used to control projects, tasks and scheduled assignments. The Case record contains general information about the Case and also works as a folder, containing all items linked to it.

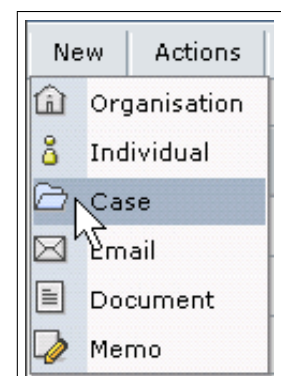


4.1 Starting a Case

The Case record is the base of every case. It contains information about the case such as Case name, Case type, Deadline, Involved party, Case responsible, Case employees to name but a few.

To register a new Case:

Place the cursor above **New** in the menu and select Case.



Case record

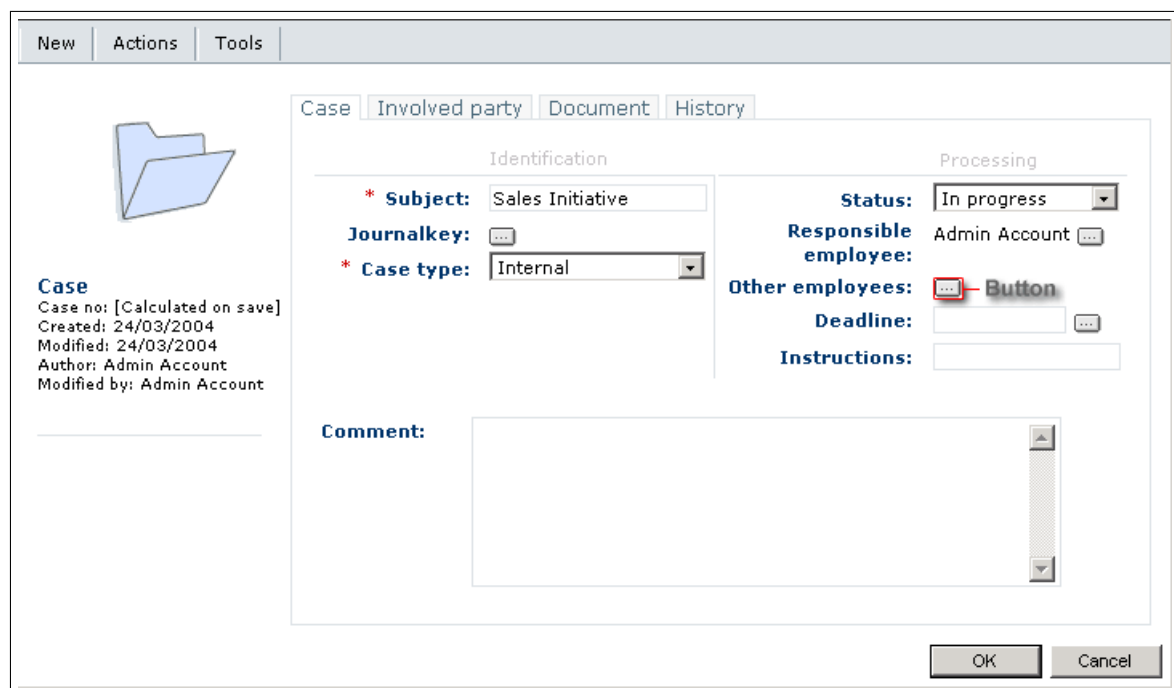
The Case record contains 4 tabs:

Case – General information about the case such as **Subject**, **Case type**, and **Responsible employees**.

Involved party – Information about involved party, if any.

Document – Displays the items shown in the Subview pane when the Case is selected in the **View** pane.

History – Shows creation date and changes made for the case as well as the Instructions history.



The screenshot shows a software interface for creating a Case record. At the top, there are tabs for 'New', 'Actions', and 'Tools'. Below these, there are four sub-tabs: 'Case', 'Involved party', 'Document', and 'History'. The 'Case' tab is active, showing a form with two main sections: 'Identification' and 'Processing'. In the 'Identification' section, there are fields for '* Subject:' (Sales Initiative), 'Journalkey:' (with a search icon), and '* Case type:' (Internal). In the 'Processing' section, there are fields for 'Status:' (In progress), 'Responsible employee:' (Admin Account), 'Other employees:' (with a search icon and a red box around the search icon), 'Deadline:' (with a search icon), and 'Instructions:'. A 'Comment:' field is located below the 'Identification' section. On the left side of the form, there is a folder icon and a 'Case' section with the following text: 'Case no: [Calculated on save]', 'Created: 24/03/2004', 'Modified: 24/03/2004', 'Author: Admin Account', and 'Modified by: Admin Account'. At the bottom right of the form, there are 'OK' and 'Cancel' buttons.

The minimum requirements when registering a Case are entering a **Subject** and selecting a **Case type**.

When the Case has been created it is displayed in the **Cases** view.

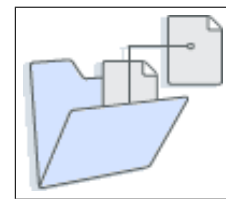


Exercise – Create a Case

- 1 Create a new Case.
- 2 Select a Case type, enter a Subject and other required information.
- 3 Save and close the Case.
- 4 Verify that the Case has been created by locating it in a view.

4.2 Phases

Cases can be further enhanced by using **Phases**. **Phases** are used to manage complex and/or routine cases. The Case is split up into smaller parts called phases.

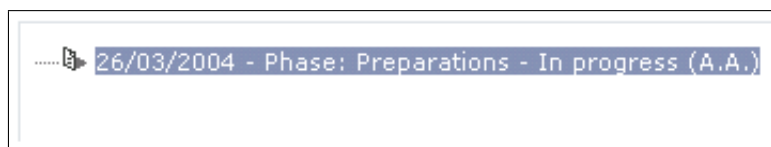


Phases are defined in connection with a **Case type**. When a case of a particular case type is created, the phases are created at the same time.

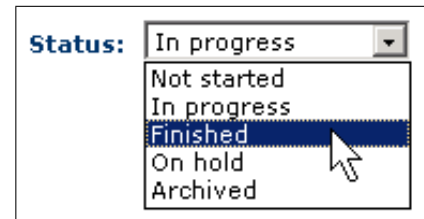
4.2.1 Phases in sequence

Depending on how they are defined, it is possible to work on some phases simultaneously. Others must be worked on in sequence:

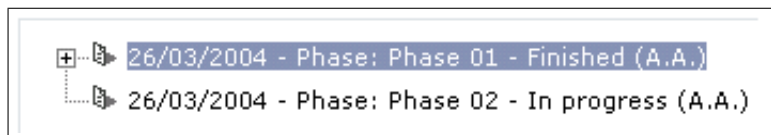
A Case with Phases has been created. The Phase is displayed in the **Subview pane** when the Case is selected in the **View pane**.



When the first phase is finished, it's status is changed accordingly.



Phase 2 is now created and displayed in the Subview pane.



Exercise – Create a Case with Phases

- 1 Create a new Case using a Case type with defined Phases.
- 2 Select the correct Case type, enter a Subject and other required information.
- 3 Save and close the Case.
- 4 Verify that the Case and the Phase(s) have been created.



Exercise – Start a new Phase

- 1 Open the Phase created in the exercise above.
- 2 Change the Status to Finished.
- 3 Save and close the Phase.
- 4 Verify that the first Phase's status has been changed to Finished and that the next Phase has been created.

Chapter 5

Working in GoPro.net



When this chapter is finished you should...

- ... be able to create and work with Memos, Email and different types of Documents in conjunction with Clients, Contacts and Cases.
- ... be able to use the GoPro.net Desktop to import files to GoPro.net.
- ... be able to create and work with folders, and move items in and out of folders.

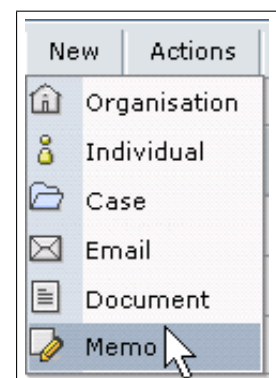
5.1 Memo

Memos are simple forms, mainly used for internal purposes. You can link a Memo to any other item, such as a Case, Organisation, E-mail or Document.

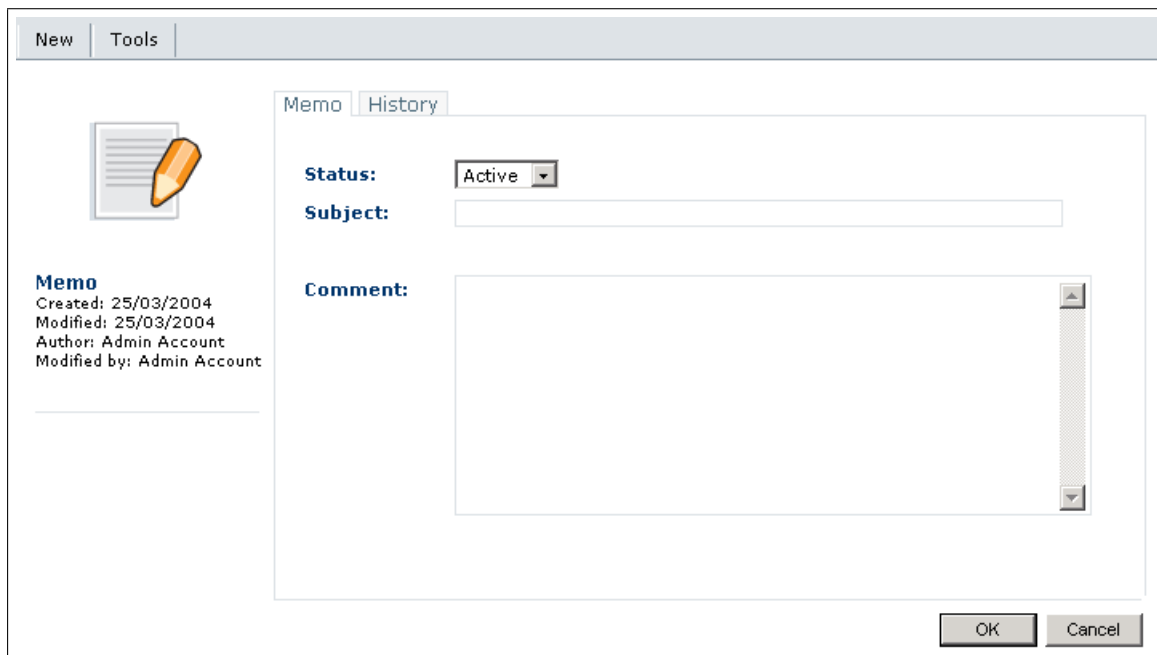


To create a new Memo:

Place the cursor above **New** in the menu and select **Memo**.




5.1.1 The Memo Form



The Memo has 2 tabs:

Memo – The Status, Subject and content of the Memo.

History – Shows creation date and changes made in the Memo.



Exercise – Create a Memo

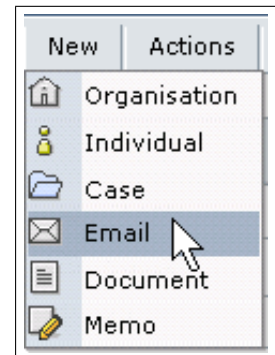
- 1** Create a new Memo.
- 2** Verify that the Memo has been created.

5.2 E-mail

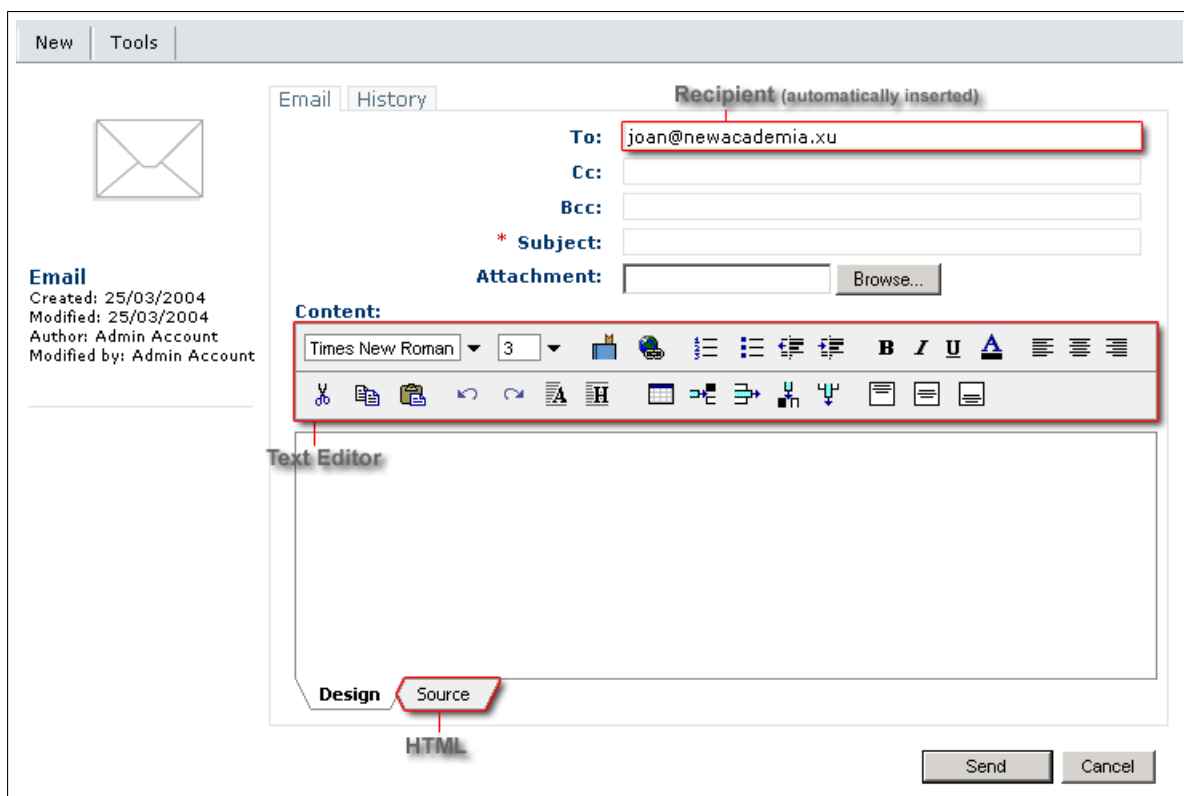
E-mail is mainly used for external communications.



To create a new E-mail:
Place the cursor above **New** in the menu and select
E-mail.



5.2.1 The E-mail Form



The E-mail has 2 tabs:

General – The Recipients, Attachments (if any), and content of the E-mail.

History – Shows creation date and changes made in the E-mail.



Exercise – Create an E-mail

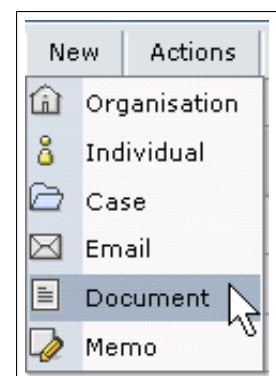
- 1 Create a new E-mail.
- 3 Verify that the E-mail has been created.

5.3 Documents

Documents can be any type of file such as a Word, Excel, Powerpoint or plain text document.

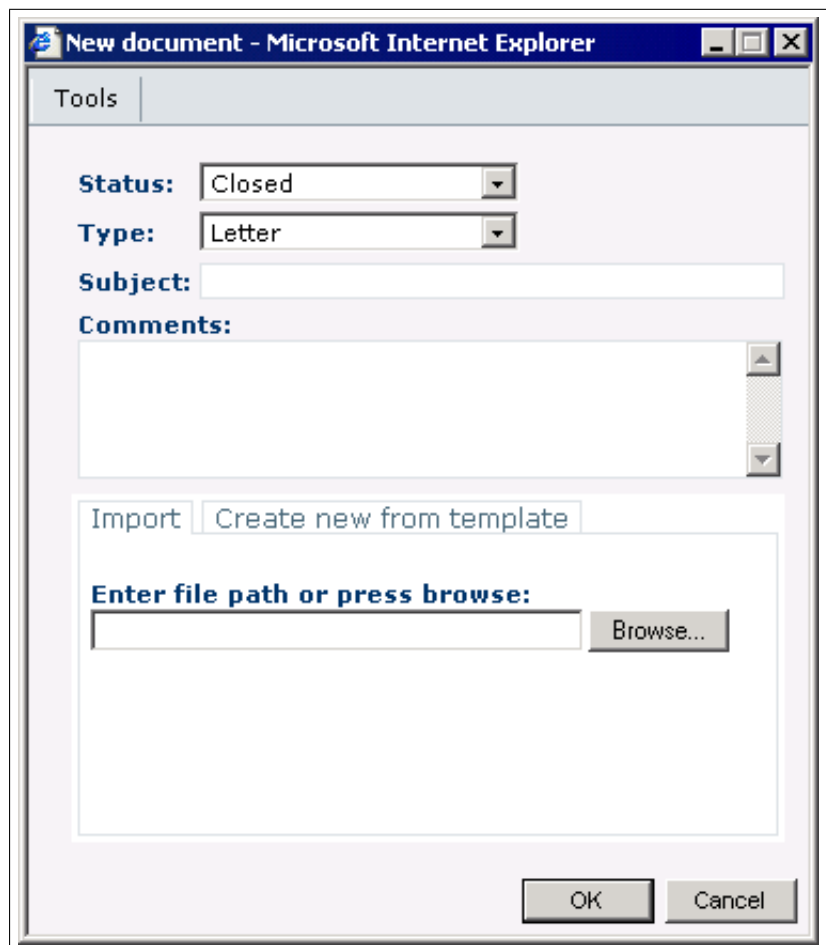


To create a new Document:
Place the cursor above **New** in the menu and select Document.



The New document dialog is displayed:

The Document dialog has 2 options; Import and Create new from template.



Import – Imports an existing document from the Windows desktop.

Create new from template – Creates a new document based on a defined template.



Exercise – Import a Document

- 1 Import a Document.
- 2 Verify that the Document has been imported.

5.4 GoPro.net Desktop

GoPro.net Desktop is a separate program for importing documents and e-mail into GoPro.net.

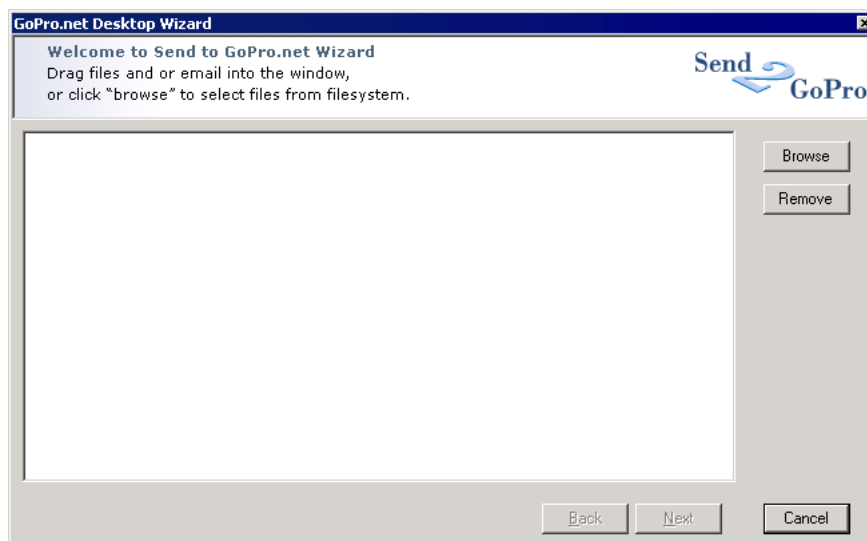


GoPro.net Desktop provides the following functionality:

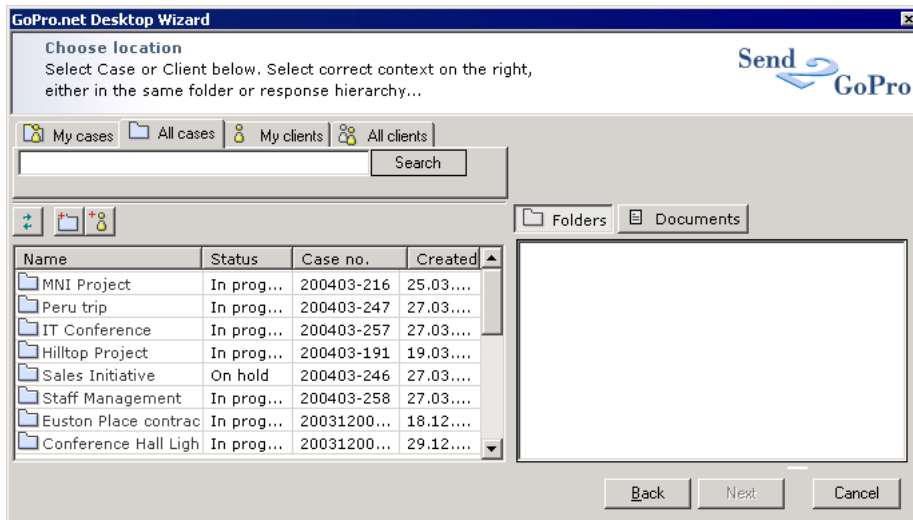
- E-mail can be imported from Outlook mailboxes to GoPro.net.
- Any file can be imported directly from the file system to GoPro.net.

5.4.1 Import a file

Open GoPro.net Desktop and click on **Browse** to select the file to import.

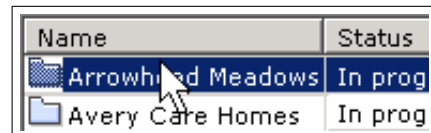


Click on **Next** to move on to the next window.



Here you select the destination in GoPro.net.

In the window on the left select the Client or Case.



- The My Cases tab displays cases where you are either responsible or other employee.
- The All Cases tab displays all cases.
- The My Cases tab displays clients where you are Account manager.
- The All Clients tab displays all clients.

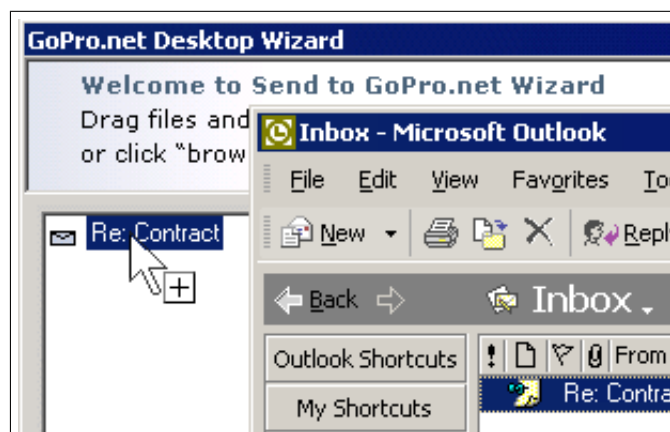
In the window on the right select either Folder or Document view.



5.4.2 Import an E-mail

Using GoPro.net Desktop to import e-mail from Microsoft Outlook is the same as when importing files from Windows desktop, except you can not use the Browse button.

You need to have both Outlook and GoPro.net Desktop visible on your screen and drag an e-mail from Outlook and drop it on the GoPro.net Desktop window.



Other than that you can follow the directions for importing a file.

5.5 Working with folders

The Subview pane provides a way for users to organise items according to their own preferences by using folders.

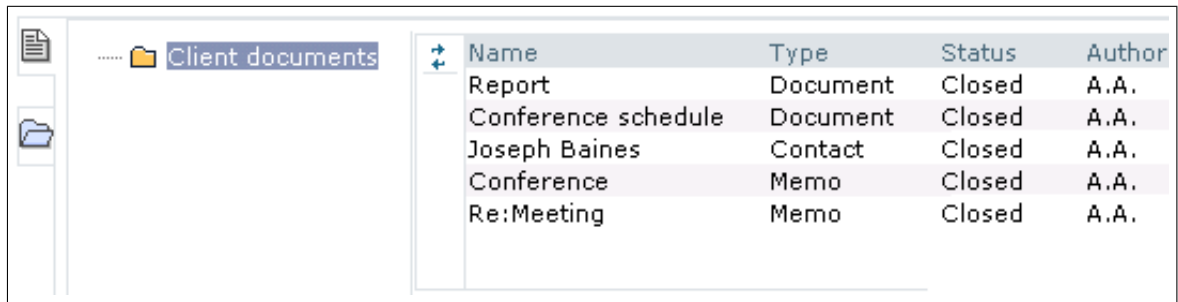
Moving items to folders does not affect how items are placed in GoPro.net. You can for example make a folder for all memos in a particular case. The memos may be located under various contacts under the case, under the case itself or even under other documents under the case. Moving these to a folder does not change their actual location within the case.

A folder is just another way of displaying items in GoPro.net. Thus you can organise the information in a way that suits your way of thinking and working.

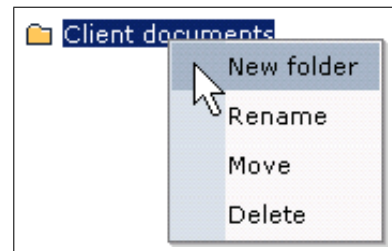
To switch to Folder view, click on the Folder view icon.



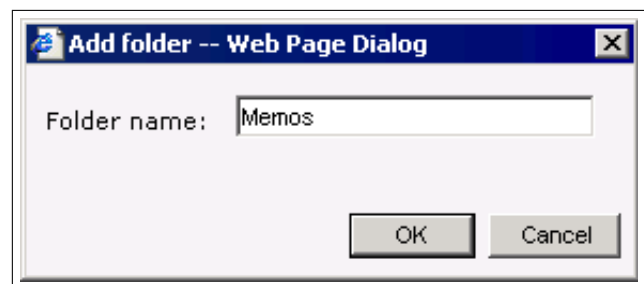
The items for this client are all at the top level.



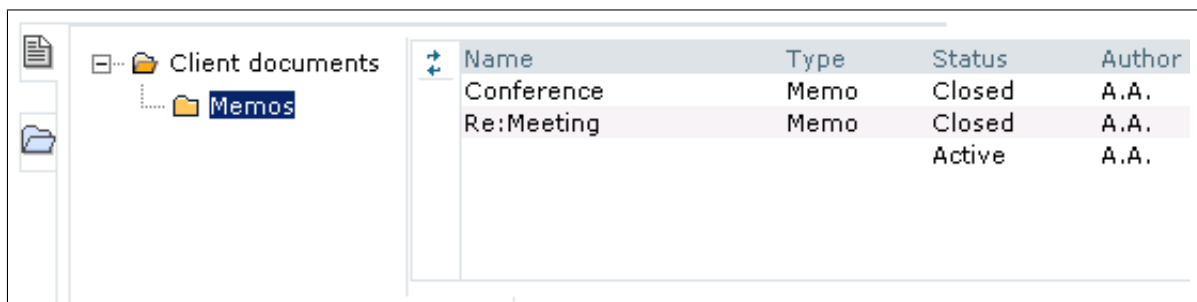
To create a new folder right-click on the top-level folder and select **New folder**.



Enter a name for the **New folder** and click on **OK**.



Move items to the new folder by right-clicking and selecting **Move to folder**.





Exercise – Working With Folders

- 1 Create a new folder.
- 2 Move items into the new folder.
- 3 Create a second folder inside the first.
- 4 Move the items again, this time into the second folder.

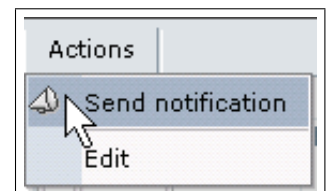
5.6 Odds and Ends

5.6.1 Notifications

When creating (or editing) an item in GoPro.net you can have a notification sent to one of your co-workers. A **Notification** is an e-mail, automatically sent to the co-workers you specify including a link to the item from which the notification is sent.

To send a **Notification**:

Open the item to send notification for. Place the cursor above **Actions** in the menu and select **Send notification**.



Select notification recipients and enter a message. Click on **OK**. Save and close the item. The selected recipients receive an e-mail containing a link to the item.



Exercise – Send a Notification

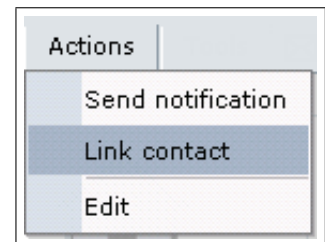
- 1 Open a Memo.
- 2 Send a Notification.
- 3 Verify that Notification is received.

5.6.2 Link contact to a Case

It is possible to link Clients or Contacts to a Case. The Contact is displayed in the Subview pane when the Case is selected in the View pane. Items can be stored under the case contact.

To link a contact to a Case:

Open the Case. Place the cursor above **Actions** in the menu and select **Link contact**. Select contact to link and save and close the Case.



Exercise – Link contact to a Case

- 1 Open a Case.
- 2 Link a contact to the Case and save and close the Case.
- 3 Verify that the linked contact is displayed in the Subview pane when the Case is selected in the View pane.

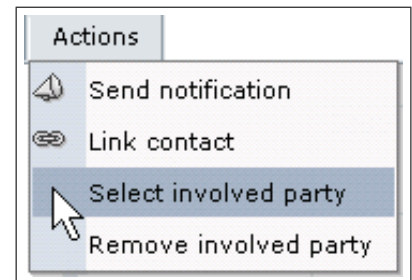
5.6.3 Add Involved party to a Case

It is possible to add an Involved party to a Case. This results in a link to the Case appearing in the Subview pane when the Involved party is selected


in the View pane.

To add an Involved party to a Case:

Open the Case. Place the cursor above Actions in the menu and select **Select involved party**. Select the involved party and click on OK. Save and close the Case.



The Case is now displayed in the Subview pane when the Involved party is selected in the Clients view in the View pane.



Exercise – Add Involved party to a Case

- 1** Open a Case.
- 2** Select an involved party for the Case. Save and close the Case.
- 3** Verify that the Case is displayed in the Subview pane when the Involved party is selected in the View pane.

Chapter 6

Searching



When this chapter is finished you should...

- ... be able to find records, documents and other items using the views, the search panel or sortable columns.

GoPro.net can contain thousands of items. It is essential to have an efficient and simple way to locate information.

You can use the **Views**, the **Search panel** or the **Columns** to find what you are looking for.

You can also combine these methods to narrow your search even further.

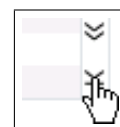
Using Views

To find an **Organisation** using the views select the clients view and scroll down to find the one you are looking for.

Click on this arrow to scroll down one page.



Click on this arrow to scroll down to the end of the view.





Exercise – Find a Client

- 1 Go to the Clients view.
- 2 Find the first client with a name that starts with "B" by scrolling down.

Using Columns in views

You can use the columns to narrow your searches in views.

To find a Case named Euston Place Contracts, select the Cases view. The cases are displayed in the View pane in the order they were created.

Cases				
	Name	Status	Case number	Created
↕	MNI Project	In progress	200403-14	28/03/2004
	Peru trip	In progress	200403-13	26/03/2004
	Denmark IT Conference	In progress	200403-12	26/03/2004
	Hilltop Project	In progress	200403-11	25/03/2004

Click on the Name column.

Cases	
↕	Name
	MNI Project
	Peru trip

This re-sorts the cases alphabetically by name.

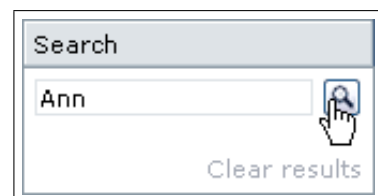
Cases				
	Name	Status	Case number	Created
↕	Conference Hall Electrical	In progress	200403-10	24/03/2004
	Conference Hall Lighting	In progress	200403-09	23/03/2004
	Denmark IT Conference	In progress	200403-12	26/03/2004
	Euston Place contracts	In progress	200403-03	18/03/2004

Using the Search panel

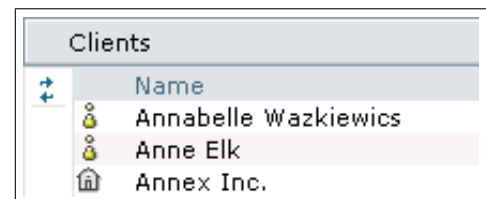
Note! When using the search panel, be aware that the search is always confined to the selected view. Searching with the **Clients** selected will only display clients matching the search criteria. It will NOT display **Cases**.

Find Organisation


To find an Organisation named **Annex Inc.**, enter "Ann" in the search field and click on the search button.



All Clients containing the text "Ann" are displayed in the View pane.



Exercise – Find an Organisation


- 1** Go to the Clients view.
- 2** Enter the first 3-4 letters in the name of an Organisation in the Search panel and click on the search button .
- 3** All Clients containing the text you entered are displayed in the View pane.

Find Individual

Remember that Individuals are displayed in the Clients view. You therefore use the same method for finding Individuals and Organisations.



Exercise – Find Individual

- 1** Go to the Clients view.
- 2** Enter the first 3-4 letters in the name of an Individual in the Search panel and click on the search button .
- 3** All Clients whose name contains the text you entered, are displayed in the View pane.

Find Contact

To locate a Contact you can either:

- find the Organisation where the Contact is employed and then locate the Contact in the Subview pane **OR**
- select the All view and use the Search panel.



Exercise – Find Contact

- 1** Use the search methods you have learned to find the Organisation where the Contact is employed.
- 2** Click on the Organisation and locate the Contact in the Subview pane.



Exercise – Find Contact using Search panel

- 1 Select the All view.
- 2 Use the Search panel to find the Contact.



Exercise – Find E-mail

- 1 Use the search methods you have learned to find the Client, Contact or Case under which the e-mail was created.
- 2 In the Subview pane click on the Type column.
- 3 All items are now sorted by type. Scroll down to Email and locate the one you were looking for.

Find Cases

To locate Cases you can use the Search panel to search for Case numbers or Case names.



Exercise – Find Case by name

- 1 Find a case by searching for it's name using the Search panel.

Find My Cases

To locate Cases you are (or have been) working on you can simply select the Cases view and enter your name in the search panel.



Exercise – Find My Case

- 1 Find cases you have created.

Find E-mail



Exercise – Find E-mail using the Search panel

- 1 Locate an e-mail you have created earlier.

Find Document



Exercise – Find Document using the Search panel

- 1 Locate a document you have created earlier.