

GETTING USED TO THE USER INTERFACE

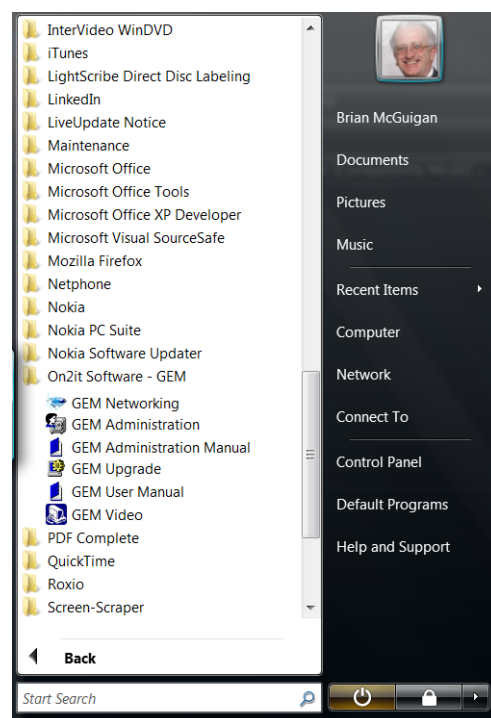
This brief introduction is designed to familiarise you with the GEM User Interface and get you used to the range of Forms it uses.

This is not intended to be a substitute for the User Manual, accessible through the Start Menu, or on-line help system that you can always get by pressing F1.

Windows Start Menu

The **On2it Software – GEM** options on the Start Menu, shown here in Windows Vista, are:

- **GEM Networking** This is the main program that you will use on a daily basis.
(This appears as 'Relationship GEM' at present.)
- **GEM Administration** contains all the administrative functions that you will use only occasionally.
- **GEM Administration Manual** contains the details of how to use the GEM Administration Program.
- **GEM Upgrade** is used to upgrade your system to the latest version, whenever you receive an upgrade patch.
- **GEM User Manual** contains the details of how to use the main program.
- **GEM Video** enables you to watch a Video giving you an overview of the system. You are strongly recommended to watch this or read the 'System Overview' in the User Manual before using GEM.



The Login Screen

When the system first opens it displays:

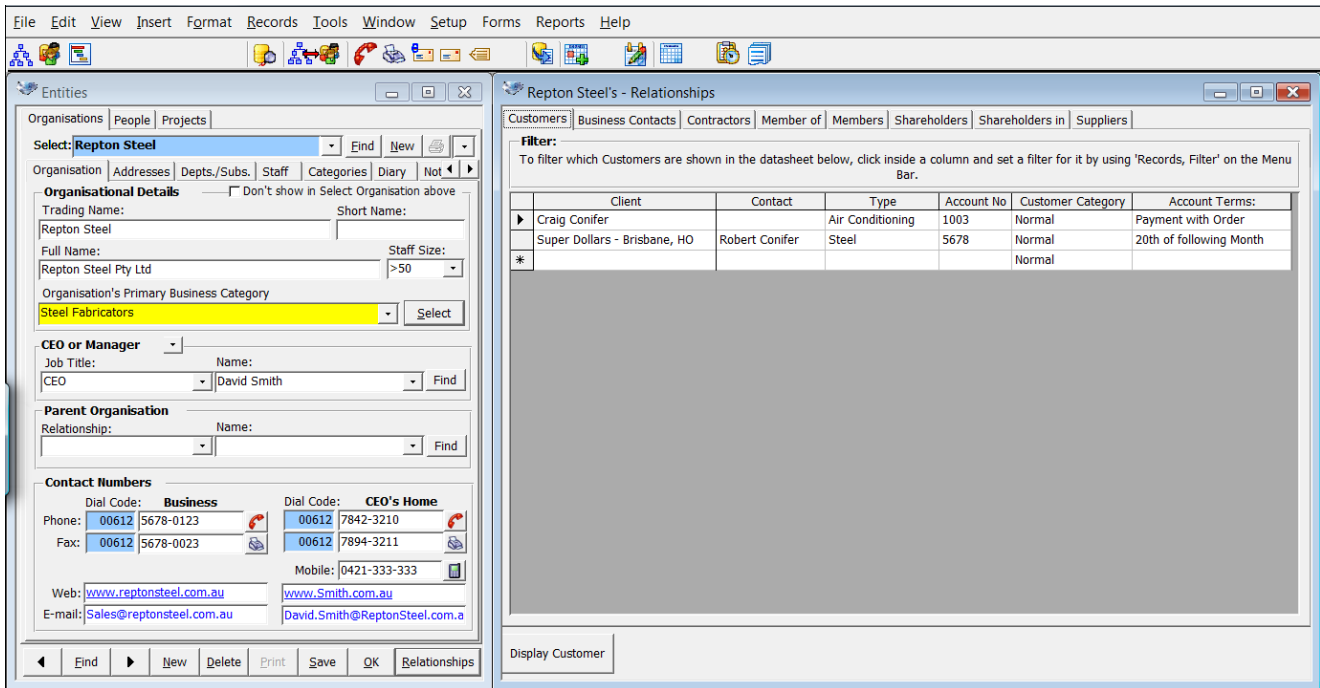
This warns you when your 30 Day Trial will expire. It also allows you to tell the system where you are so that it can display the correct dial codes to everywhere else.

You only ever need to specify local phone numbers in GEM as it already knows the dial codes to nearly everywhere in the World. If it doesn't, it will prompt you for them.



Initial Display

Once you have logged in you will see:



Well it may look like this as the form displayed on the right will depend upon the form that you last had open on that side – so you can carry on where you left off.

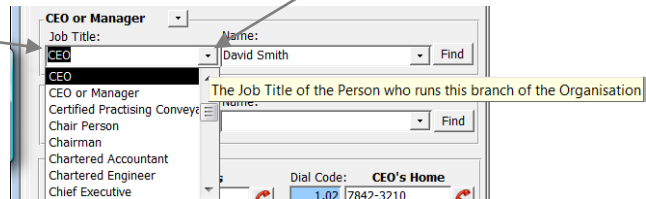
System Conventions

Before we rush into introducing you to the various forms in the system we will cover some of the conventions that apply throughout the system.

Fields with a Blue Background are used to imply that the information they display are not normally required to be input, as the system will work it out for you.

Double-Clicking anyone's Name anywhere in the system will display their record on the left-hand side of the screen.

Combo Boxes like this are used to select from options that may already exist. If you click the **pull-down arrow** on the end of the Box, you will be able to see all the pre-existing options. You can either scroll down and select the required option, or just start typing in the box - if there is a matching option it will 'auto complete' for you. (Combo boxes are not case-sensitive. They work better, in fact, if you always use lower-case.)



You should NOT assume you are restricted to items in the pull-down list, as obviously the system could not possibly be pre-loaded with every possible Job Title of everyone in the World. So this particular Combo Box is pre-loaded with just the Job Titles of everyone who is in the system, as this then makes using existing titles easier.

If you enter the Name of someone who does not exist, you will usually be given the option of creating a new record for them. This is because in GEM you are not just adding text into a box but creating links between records.

Working with Data Grids like this:

	Client	Contact	Type	Account No	Customer Category	Account Terms:
▶	Craig Conifer		Air Conditioning	1003	Normal	Payment with Order
	Super Dollars - Brisbane, HO	Robert Conifer	Steel	5678	Normal	20th of following Month
*					Normal	

- ▶ Indicates the Current Record
- ✍ Indicates a record currently being edited
- * Indicates an 'Empty' Record at the end of the record set

To copy data in a particular column from the row above press the <ctrl>, <shift> and <quote> Keys on your keyboard simultaneously.

To Select a Record click the 'Record Selector' Button at the left-hand end of the Data Grid.

	Client	Contact	Type	Account No	Customer Category	Account Terms:
▶	Craig Conifer		Air Conditioning	1003	Normal	Payment with Order
▶	Super Dollars - Brisbane, HO	Robert Conifer	Steel	5678	Normal	20th of following Month
*					Normal	

To Delete a Record use the <Delete> Key on the Keyboard. This will delete the currently selected record.

To re-size a column, simply drag the right-hand end of the column heading.

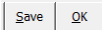
To re-position a column, click the column heading to select the entire column and drag the column heading to the desired location.

To sort on any column right-click in it and then select Sort Ascending or Sort Descending.

The Save Button saves the current record to the database.

The New Button saves the current record if has not already been saved and creates a new blank record for you.

The OK Button saves the current record to the database and creates a new blank record for you. It is the same as using the Save button and then the New button. (So effectively the New and OK Buttons do the same job.)

The Save and OK Buttons  do not normally need to be used, as records will normally be written to the database whenever you move from one Record, Tab or Form to another. Just occasionally you may need to use them, however. This is because the pre-existing options behind Combo Boxes are normally loaded when a Form first opens. So if you have added an option that you want to see in Combo Box after the Form has loaded, you might not be able to find it. In these circumstances you will need to use the Save Button to force a Record to be written to the database and then re-open the Form in question, or use **Records, Refresh** from the Menu Bar to 're-query' the Form.

The Find Buttons are context sensitive. So if you are on the Organisations Tab, the FIND Form will look for an Organisation for you. If you are on the People Tab it will look for a Person for you. If you click the Find button nearest to the Name of the CEO or Manager it will look for someone, already in the system, to become the CEO or Manager. If you use the Find Button nearest to someone's Wife/Partner it will look for someone to become their Wife/Partner and so on.

Double-Clicking Phone Numbers or clicking Buttons alongside them, will dial phone calls for you. (Provided you have a Modem in your machine, and the phone line is connected through a 'Y Splitter' to both your Modem and your phone.)

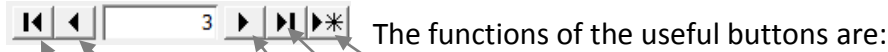
Double-Clicking Fax Numbers, or clicking Buttons alongside them, will send Faxes for you.

Double-Clicking E-mail Addresses will send E-mails for you.

Double-Clicking a Website Address will open the Website for you.

Navigating Record Sets

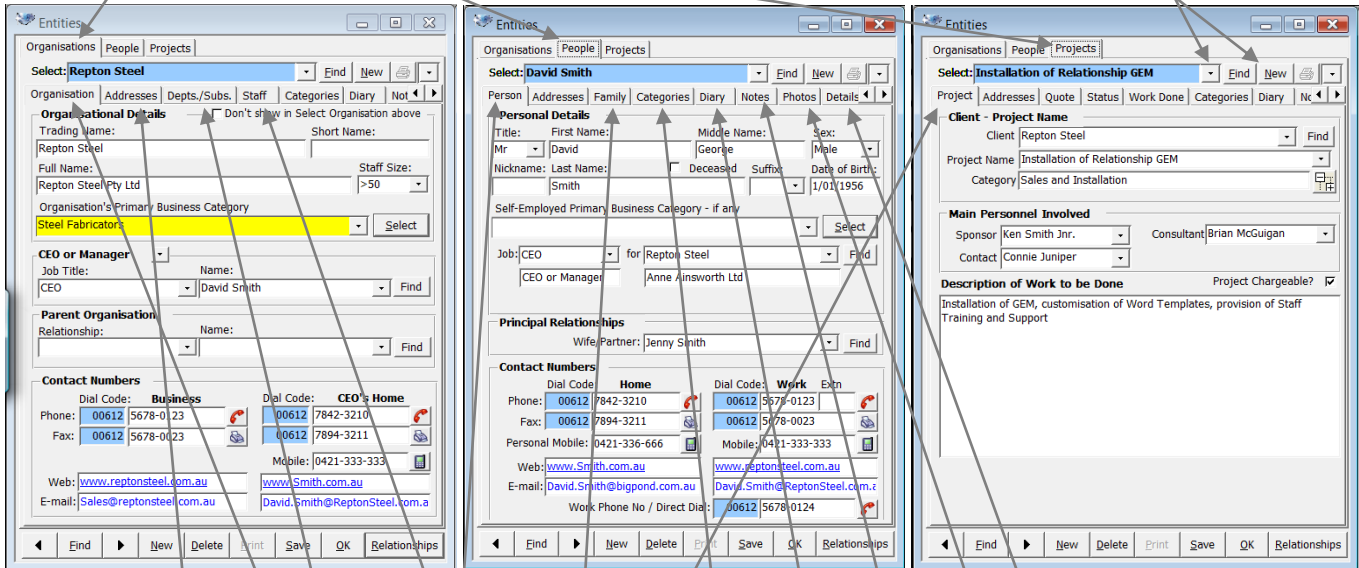
Occasionally you will see Forms that have buttons at the bottom that look like this:



Go to **FIRST, PREVIOUS, NEXT, LAST, NEW** Record

'Entities' Form

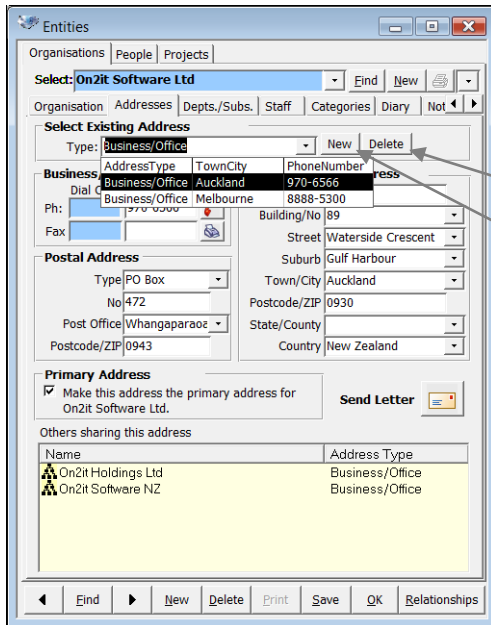
The 'Entities' Form will always be displayed on the left. This Form enables you to **Select** any of the existing **Organisations, People or Projects** that are already in the system, or add a **New** one.



The second row of Tabs changes dynamically dependant upon the 'Entity Type' selected, so that you may enter the appropriate data for an Organisation, Person or Project.

The first Tab for an **Organisation, Person or Project** always displays; the information that makes an 'Entity Type' different from any other, their principal relationships and main contact details. The remaining **Addresses, Depts./Subs., Staff, Family, Categories, Diary, Notes, Photos, Details** Tabs and so on, display the information that is shared between different 'Entity Types'.

The Address Tab



The Addresses Tab enables you to create as many Addresses of as many Address Types as you like for everyone in the system.

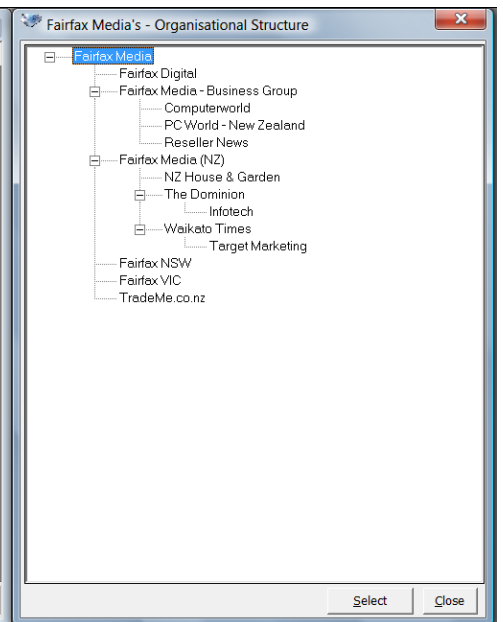
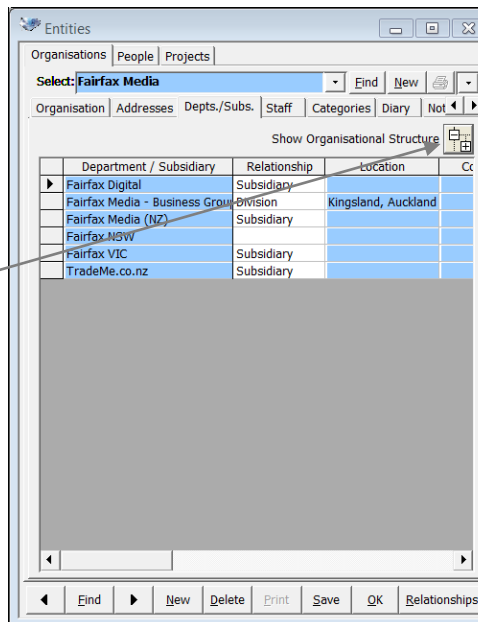
By recognizing an Address from its associated Phone Number the system automatically tracks who else shares the same Address. So if you change the Address for anyone of them, it changes for all of them.

If someone leaves home, you simply **Delete** this Address for them and give them a **New** one.

The Depts./Subs. Tab

This shows the Departments and Subsidiaries of the current Organisation.

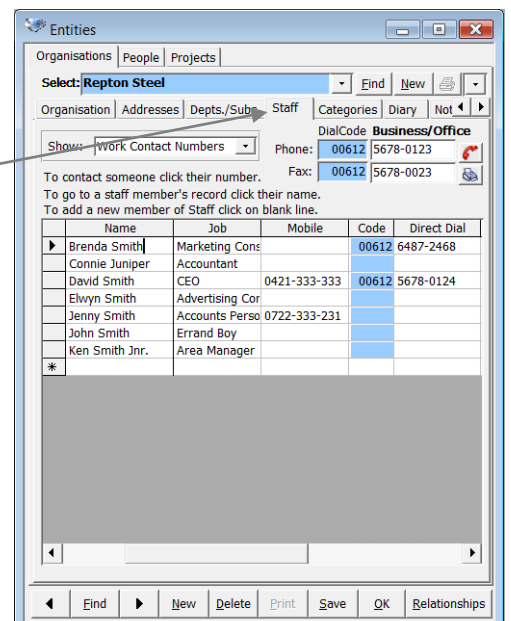
If you click on the **Tree View** button it will show the Organisational Structure for the entire group of which it is a part. The system simply deduces this from the Parent Organisation for each Organisation.



These Tree-View Forms are always 'Modal'. This means the system will wait for you to select what you want, or close the form. If you therefore try to click on any other form the system will just beep at you - nothing else happens.

The Staff Tab

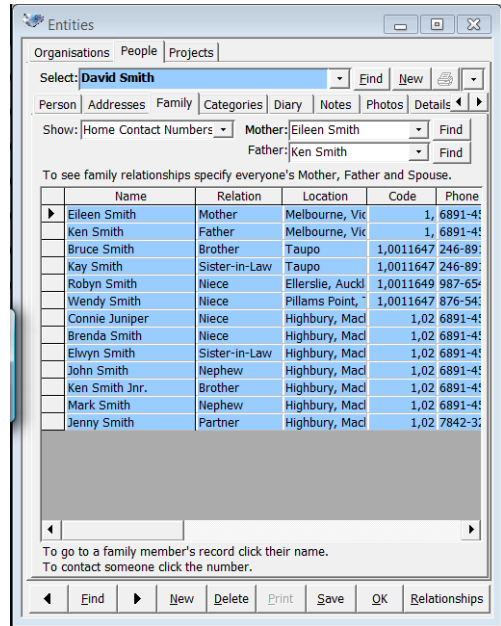
This shows the Work and Home contact details for all members of Staff of the current Organisation.



The Family Tab

This uses GEM’s knowledge of who everyone’s Partners and Parents to deduce all their other relatives in the system. You can’t add People into this list or edit the data it contains, as the system generates it for you. That’s why it has a blue background and no * at the end of the list.

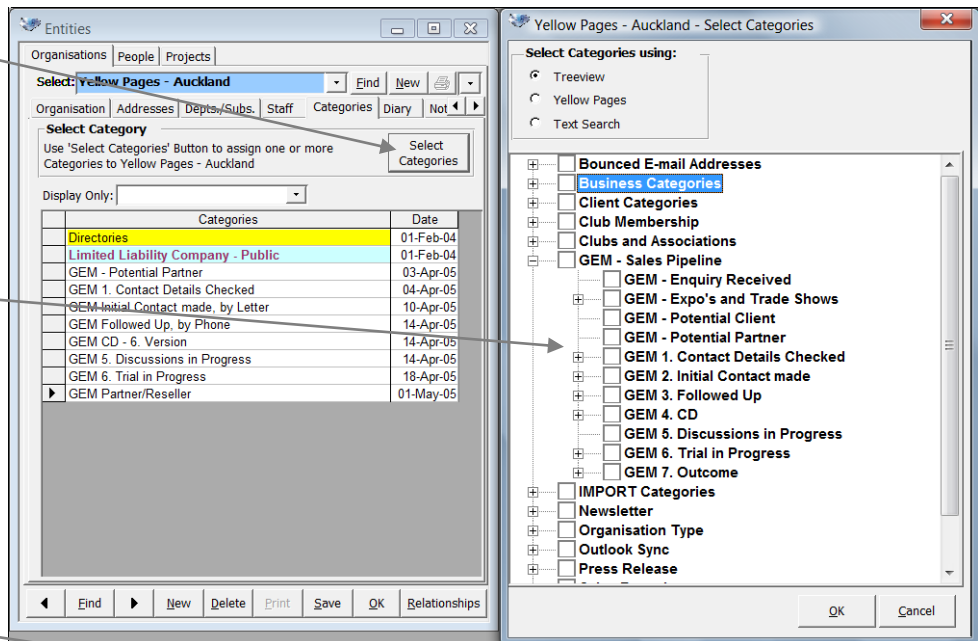
Please note the data in this list is totally independent of the Family Relationships that you CAN specify on the ‘Personal Contacts’ Tab of the ‘Relationships’ Form that displays on the right-hand side of the screen.



The Categories Tab

This can be used to assign as many Categories to anyone or anything in the system, for any purpose you like.

Clicking the **Select Categories** Button will reveal the hierarchical nature of GEM’s Categories.



The Select Categories Form will not allow you to do anything else until you have closed the form. It will just beep at you. (It is said to be ‘modal’ form.)

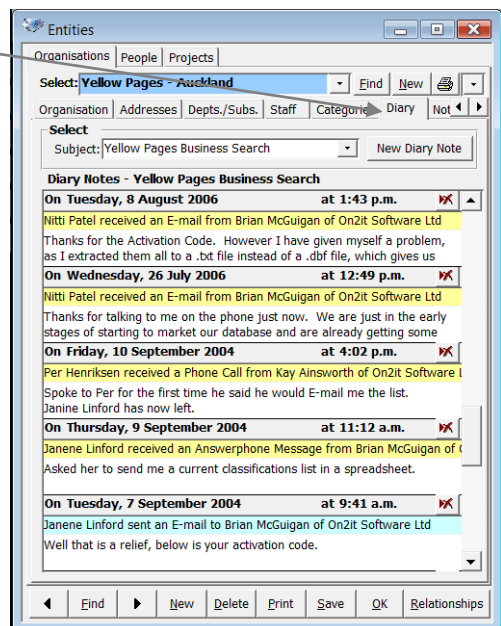
The Diary Tab

This shows all the ‘Diary Notes’ about a particular Subject from the point of view of anyone involved. So you can see incoming and outgoing E-mails, Phone Calls, Faxes, letters to and from multiple people all merged into a consolidated history in an unprecedented way – as is illustrated here.

Notes are listed with the most recent notes at the top.

If you go to an Organisation’s Diary Notes you can see the dealings you’ve had with every member of staff even those that are no-longer there.

If you go to a Person’s Diary Notes you can see all the dealings you’ve had with them – even the ones for previous employers.



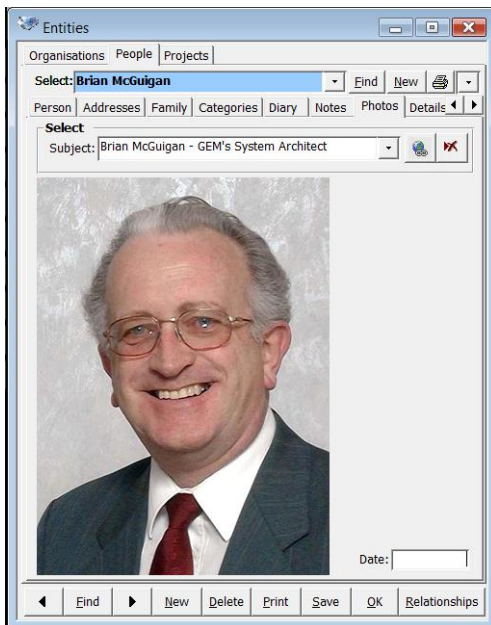
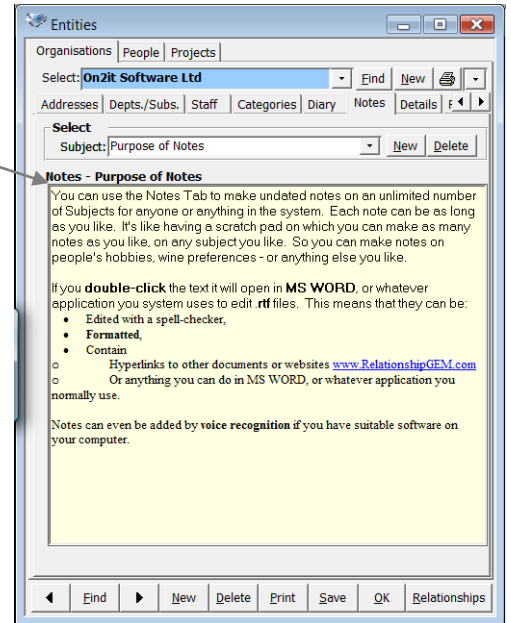
The Notes Tab

The notes we've made on this particular Tab say it all.

The Photos Tab

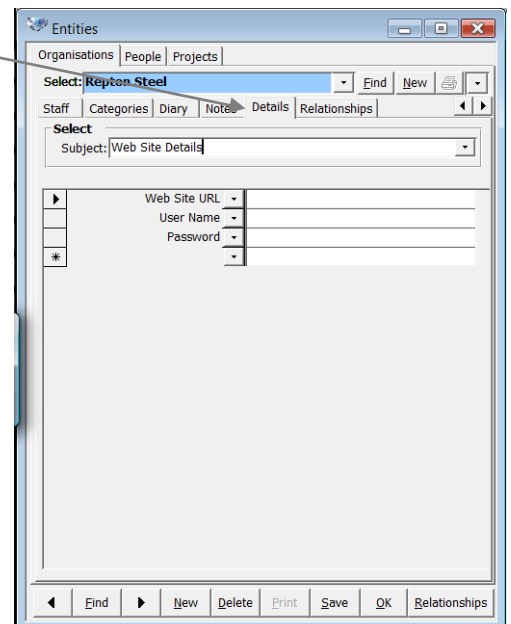
This enables you to store an unlimited number of photos of anyone or anything in the system.

The photos are not actually stored in the database – just a hyperlink to their real location. (This prevents the database getting bloated with objects as large as photos.)



The Details Tab

Enable to input an unlimited number of user defined Fields under an unlimited number of subject headings.



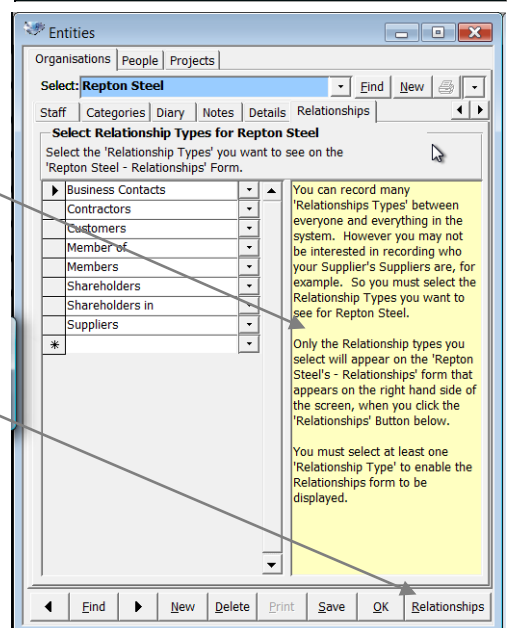
The Relationships Tab

Tab

As the **Information Panel** on this Tab explains, this Tab controls which Relationship Types you will see on the 'Relationships' Form on the right-hand side of the screen when you click the **Relationships** Button for the current Entity.

GEM uses 'Information Panels' this wherever a little more explanation is required. Often they are context sensitive and display different information dependent upon which field you are pointing at with your mouse.

'Information Panels' are useful because most people don't like using F1 to bring up on-line HELP, or having to refer to a User Manual. You will see more of these therefore in parts of the system you don't use too often.



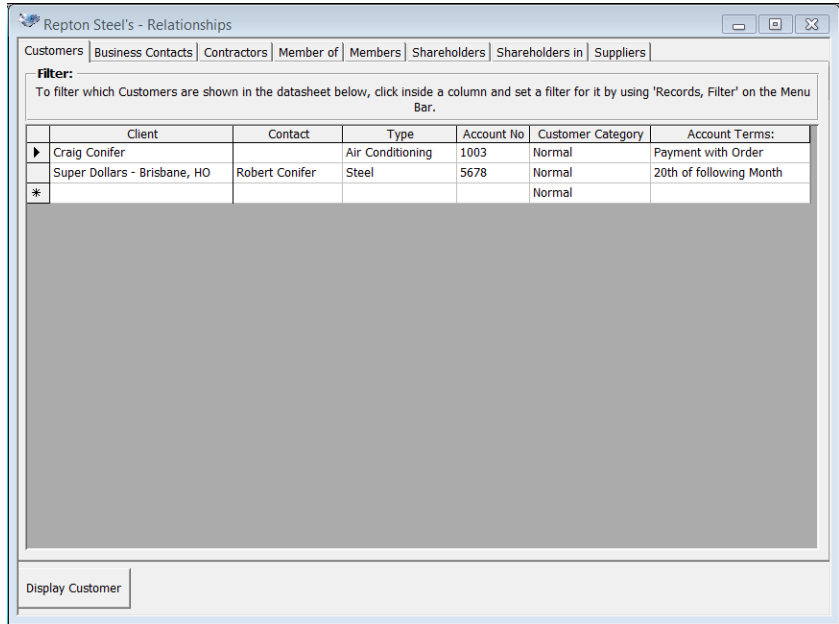
Right-Hand Side Forms

The Forms that may be displayed on the right are:

The Relationships Form

This displays all the Relationships between the 'Entity' on the left and everyone and everything else.

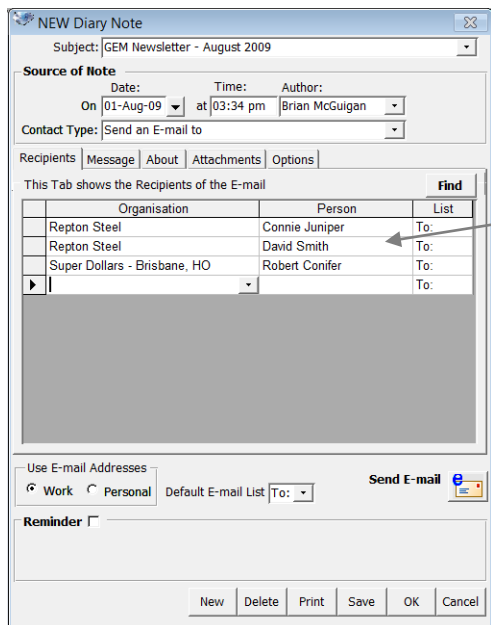
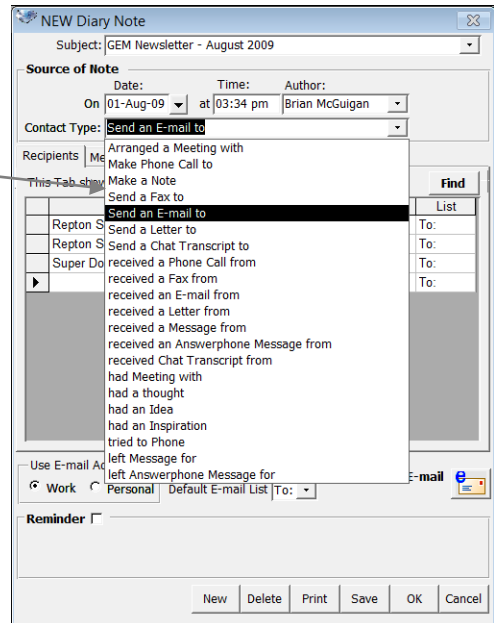
When you create a Relationship between, it always creates both sides. So if you say someone is your Supplier the system will know that you are their Customer. If you say someone is your Uncle, it will know you are their Nephew, if you are male and their niece if you are female.



The Diary Note Form

This is used whenever you want to record anything that has a date. Whenever you want to do any of those things illustrated in the pull-down list shown: (You can even add to the list if you need to.)

GEM uses 'Diary Notes' to originate correspondence and keep track of what has happened in the past. It makes use of MS Outlook's Calendar to make Appointments and plan the future.



Whenever you make a 'Diary Notes' note GEM keeps only one copy, but creates an index for all the Organisations and People involved. This enables you to see all correspondence and notes about phone calls etc., in a single consolidated history from the point of view of anyone involved – even for past employees and previous employers.

The Timesheet Form

If you regularly keep track of the time you spend working on various Projects, you will see the 'Timesheet' Form displayed on the right. This enables you to track minute by minute how you spend your day and accumulate your hours if you need to charge your clients.

Start	Finish	Client	Project
10:45	11:20	Taupo Bungy	Sales System Modifications
12:52	13:05	Taupo Bungy	Sales System Modifications
13:23	13:37	Taupo Bungy	Sales System Modifications
13:27	13:54	Taupo Bungy	Sales System Modifications
13:54	14:18	Taupo Bungy	Sales System Modifications
14:18	14:45	Taupo Bungy	Sales System Modifications
14:45	14:56	Taupo Bungy	Sales System Modifications
14:56	15:33	Taupo Bungy	Sales System Modifications
15:33	15:39	Taupo Bungy	Sales System Modifications
15:39	15:56	Taupo Bungy	Sales System Modifications

Another way you can keep track of time you spend working on Projects is through the use of a 'JOB Card'. This too is displayed on the right of the screen, but you are less likely to see it there when the system first opens – as it is less rarely used.

The Toolbar

Much of GEM’s remaining functionality can be see by taking a tour through the Toolbar:



FIND - anyone, anything, or groups, given any set of Criteria.

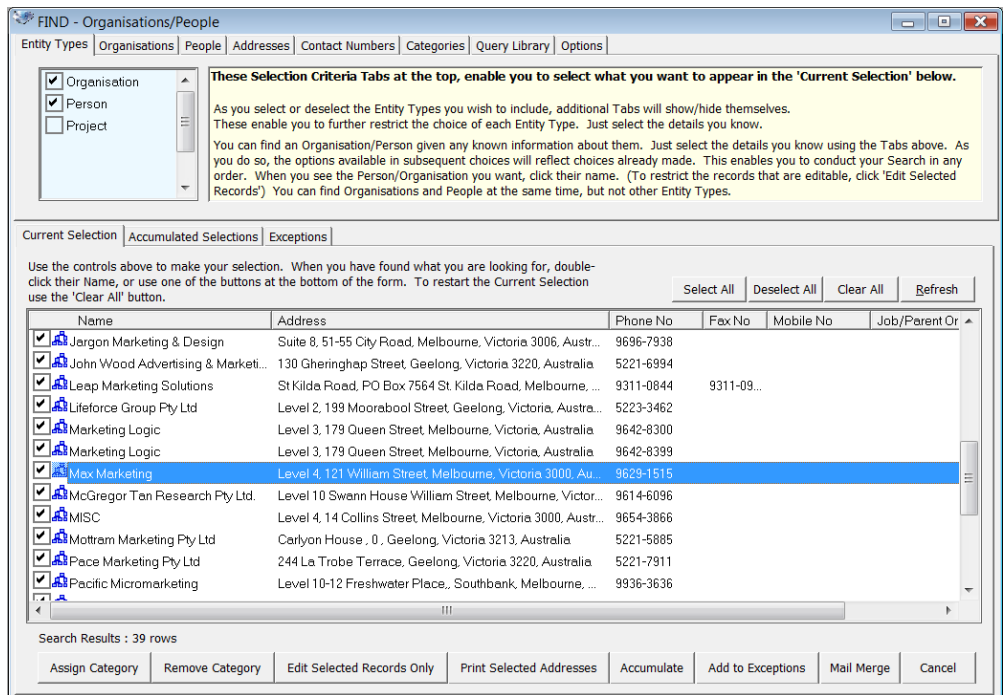
The function of any Button will be revealed by a ‘Tool Tip’ that appears when the Mouse hovers over a Button.

The first three buttons merely switch ‘Entity Type’ Tabs on the ‘Entities’ Form to either :

- Organisations,
- People or
- Projects.

The FIND Form

The next button displays the ‘FIND’ Form that enables you to find anyone, anything, or groups, given any set of criteria – as the ‘Tool Tip’ suggests.



This Form crops up in many guises throughout the system, whenever you want to find anything or select groups to do a mail-merge. Because of the multi-functional nature of this form, once you’ve learnt to use it once, you can apply your knowledge throughout the system.

Like Microsoft’s ‘Ribbon’ in Office 2007, the Tabs at the top of the form, customise themselves according to what you are looking for, as does the message in the Title Bar at the top of the form and the buttons along the bottom.

It also has ‘Information Panels’ that explain how each part of the Form works – to save you wondering and having to hit F1 too often.

If you are using the FIND Form to find just a single option; say an Organisation’s parent company or someone’s Wife, then the FIND Form will behave ‘Modally’. This means you will either HAVE to find what you are looking for, or close the form. If you try to do anything else, the system just beeps at you until you close the form.

The Relationships Button on the Toolbar



Enter/Display: Every kind of 'Real-World' Relationship, between everyone and everything in the system.

Displays the 'Relationships' Form on the right that we've seen earlier.

The Make Phone Call Button



Make: Phone Call - with or without 'Diary Note'

Phone Numbers

Displays all the Phone Numbers for anyone in the system, as both they and their Employers/Employees may, in reality, have several Addresses.

Entity Type: Name: Repton Steel

Display Phone Script:

Repton Steel's Addresses

AddressType	Dial Code	Phone No	Location
Business/Office	00612	5678-0123	Macksville, New South Wales, Au

Show Staff's Work Contact Numbers

Name	Job	Mobile	Extn
Brenda Smith	Marketing Consultant		830
Connie Juniper	Accountant		
David Smith	CEO	0421-333-333	
Elwyn Smith	Advertising Consultant		
Jenny Smith	Accounts Person	0722-333-231	815
John Smith	Errand Boy		
Ken Smith Jnr.	Area Manager		

If you have a Modem connected, double click any Phone Number to Auto-Dial it. Data in this form is NOT editable. If you want to change it, double-click the appropriate name.

Close New Diary Note

This displays the 'Phone Numbers' Form on the left of the screen.

As the Form says, it displays all the Phone Numbers for anyone in the system as both they and their Employers/Employees may, in reality, have several Addresses.

This form is also displayed if you open the 'Diary Note' Form and choose to 'Make a Phone Call'.

The Send Fax, Send E-mail and Send Letters Buttons



Send: Letter - with or without a 'Diary Note'

These three Buttons all display very similar Forms:

SEND Fax

Fax | Signature

Address

Salutation: Dear [] Informal

To: Mr Brian McGuigan

Name: On2it Software Ltd

SORRY - On2it Software Ltd has NO Fax Number

Select

Fax: Custom Fax - Auckland

Subject:

Category:

Make 'Diary Note' Open Fax before sending

Close Send Fax

SEND E-mail

E-mail | Signature

Address

Salutation: Hi [] Informal

To: Heather

Name: Snowplanet

heather@snowplanet.co.nz

Select

E-mail: GEM Thanks for Downloading

Subject: Thanks for Downloading

Category: GEM CD - Followed Up, by E-mail

Make 'Diary Note' Open E-mail before sending

Close Send E-mail

SEND Letter

Letter | Signature

Address

Salutation: Dear [] Informal

To: Ms Heather Reid

Name: Snowplanet

Address: 91 Small Road
Silverdale
RD 2
Auckland 0992

Use Physical Address

Select

Letter: GEM Trial CD

Subject: GEM Relationship Management System

Category:

Make 'Diary Note' Open Letter before sending

Close Print Envelope Send Letter

They are actually the same Form that simply displays a different Title. They are also displayed however you choose to initiate your correspondence. You can start from the Toolbar, a Diary Note or a Mail-Merge. It does not matter how you start, they all end up here so that you can choose which Template you want to use, and how you wish to address and sign your correspondence.

The Signature Tab is the same for all of them. It even enables you to add a password protected signature, if you wish.

The Print Label Button

Displays the 'Address Label' Form, which is handy for printing parcel labels and so on.

The MAIL-MERGE Button



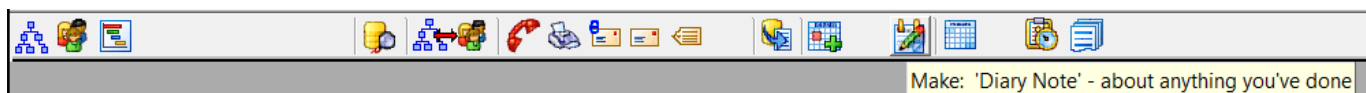
This displays the FIND Form that we saw earlier.

The ADD Appointment Button



This displays the 'Diary Note' Form preconfigured to create an Appointment in MS Outlook. The advantage of doing this way, rather than doing in Outlook, is that GEM automatically adds the Address of who the Appointment is with.

The Make 'Diary Note' Button



This displays the 'Diary Note' Form that we saw earlier.

The View Calendar Button



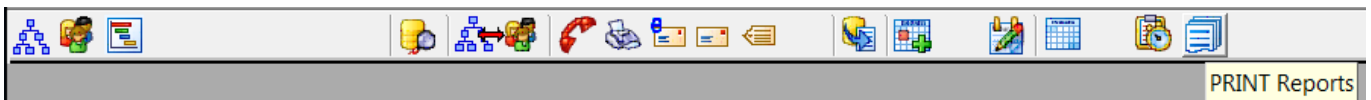
Opens your Calendar in MS Outlook.

The Timesheet Button



Displays the Timesheet Form we saw earlier.

The Print Reports Button



Displays the Projects Reports Form, which enables to select which Project Report you want to print.

A screenshot of a dialog box titled "Project Reports". It contains several fields and buttons:

- Choose a Report:** A dropdown menu with "Client Charge Sheet" selected.
- Date Range Of Interest:** A dropdown menu with "Timesheet Summary" selected.
- From:** A text field containing "1 /07/200" and a "Default Dates" button.
- Project Filter:** A section with several dropdown menus: "Client", "Project", "Consultant who did the work", "Order Number", and "Status".
- Invoice Number:** A dropdown menu.
- Buttons:** "Reset Filter" and "Reset Form" buttons.
- Print Button:** A button labeled "Print Client Charge Sheet".
- Close Button:** A button labeled "Close".