Basic intertrac Skills

How do I create documents?

You can create new documents from the module **navigator**. You can also create a new linked document that is associated to the constituent or case of an existing document via the **Associate** button.

To create a new document:

1. Select the module where that type of document "lives." (ex. Select Casework and the Case tab.)
2. On the navigator, under **Create New...**, select the document. (ex. Select **Case** to create a new case.)

To create a linked document from another document or view:

1. Select the record in the view (click once to highlight it blue)
   OR
   Double-click to open the record.
2. Click **Associate** Associate on the task bar.
3. Select a document type from the pull-down menu.

How do I show the record detail in a view?

1. Click to expand the associated record detail.

How do I see everything we've sent to a contact?

1. In the contact record or a record associated to the contact, click to expand the **Communications** section.
2. The Communications section displays all related system documents and the document descriptions, sorted by date.
3. To open a document, double-click the description.

How do I edit a document?

1. In the view, double-click the document that you want to edit. The document displays in *view-only* mode.
2. Click **Edit** Edit The document switches to *edit* mode.
3. Make any necessary changes and click Save.

How do I close a document that is complete?

1. Open the document and click **Edit** Edit on the task bar.
2. In the Status field, select **Closed**.
3. **Save** the document. intertrac assigns a closed status to the document and removes it from the Open and Pending views.

How do I sort the document views?

In the views, you can click a column heading with a icon to sort information alphabetically, in numerical ascending/descending order, or by date created, depending on the type of data in that column.

1. Click the column title. The view sorts the records by that column.
2. Click the heading bubble Name to return to the default sort.

How do I delete a document?

1. Click the checkbox next to each document you want to delete.
2. Click **Options** Options on the task bar and select **Delete Selected Document(s)**. intertrac removes the document(s) from the view.

How do I restore a document?

1. In the same module (ex. Contacts), click the **Maintenance** tab.
2. On the navigator, select the **Deleted Documents** view.
3. Click the checkbox next to each document you want to restore.
4. Click **Options** Options and select **Restore Document**. intertrac displays the restored documents in the regular views.

How do I find my documents?

1. On the task bar, select the **Show Mine** checkbox

How do I search for documents?

There are four ways to search for information in intertrac:

- **Column search** for text/characters in a column of the view.
- **Full-text search** for a word/phrase across all records in the view.
- **Easy Search** for one or more words/phrases in specific fields across all records in the view.
- **Site search** for a word or phrase across the entire site (similar to a Google search).

To use column search:

1. In the view, click the in the column heading.
2. To search for a name or keyword, type it in the Search field and click **Filter**. intertrac displays only the matching records.
   OR
   To jump to a point in the list, type the first letter or the keyword and click **GoTo**. intertrac scrolls to the first record matching those characters automatically.
3. Click the heading bubble Name to return to the default sort.

To use full-text search:

1. Type what you want to find in the **Search this view...** field.
2. Click intertrac displays all matching records.
3. Click to clear the results and view all records.

To use Easy Search:

1. In the view, click Options on the task bar.
2. Select **Easy Search**. A pop-up displays the form fields to search.
3. In a field, type what you are searching for. (For example, you might type **Smith** in the Last Name field.)
4. Click the **Search** button. intertrac displays all matching records.
5. Click in the full-text search field to clear the results.

To use site search:

1. In the top right corner of the browser, type what you want find in the **intertrac Search** field.
2. Click . The Search page displays your results. Click a link to open a record.

Note: If you have a large number of results, the Search page will display the total number found. You can refine your search using the Advanced Search options on this page or click the number of documents to display the full results.

How do I run reports?

1. Open the database you're reporting on. If you're reporting on just a few records, click their checkboxes to select them now.
2. Click **Options** Options on the task bar and select **Reports**.
3. Select the **Report name**. The name will be highlighted blue.
4. If you selected records in step 1, select **Use pre-defined criteria**.
   OR
   Click the **Advanced Search** button.
   - In the Basic Search field, type your criteria.
   - Click the **Search** button.
   - Click **OK**. The pop-up closes and **Use advanced...** is selected.
5. Click **OK**. intertrac launches MS Word and displays the report.

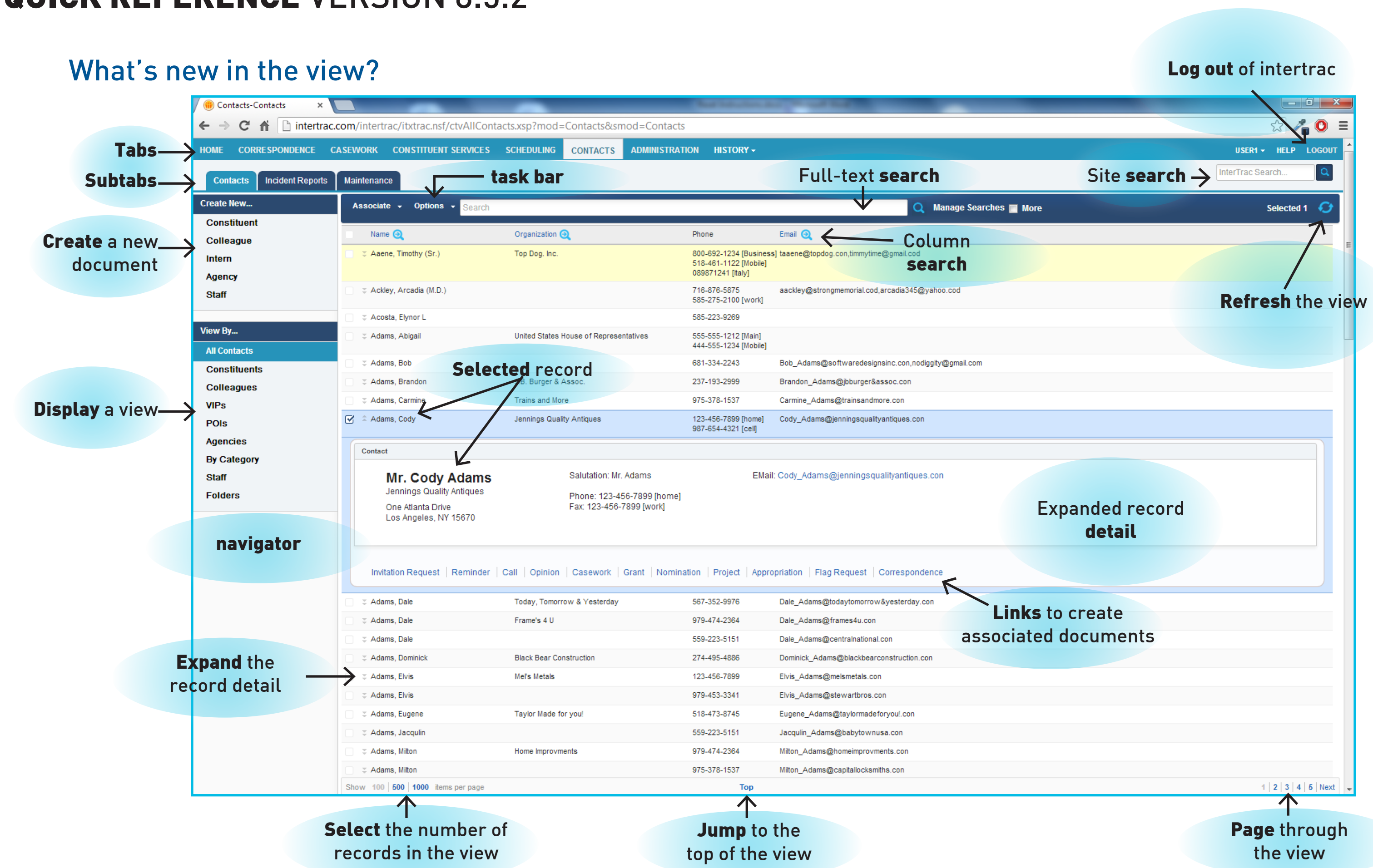
www.computerworks.com

intertrac BY COMPUTERWORKS

intertrac for government

QUICK REFERENCE VERSION 8.5.2

What's new in the view?



Where do I find it?

Assignments	Home
Appropriations	Constituent Services
Call reports	Constituent Services
Case Correspondence	Casework
eMedia	Home
Flag & Tour Requests	Constituent Services
Grants	Constituent Services
Incident Reports	Contacts
Nominations	Constituent Services
Opinion tracking	Constituent Services
Reminders	Home
User Preferences	Your Name (in top heading)
Web mail	Correspondence

Useful buttons

- Select
- Add
- Edit
- Remove
- Delete
- Add a Role
- Download
- Upload

Basic Correspondence Skills

How do I access my correspondence?

1. Click the **Correspondence tab**.
2. Click the **Correspondence subtab**.
3. On the navigator, select a **view** (ex. **Pending**).
4. On the task bar, select the **Show Mine** checkbox.

How do I create a correspondence?

From a Correspondence view:

1. On the navigator, under **Create New...**, click **Correspondence**.

From another document (linked):

1. In the open document or view, click **Associate** on the task bar.
2. Select **Correspondence**.

How do I add a constituent to a correspondence?

1. The People Finder screen automatically pops up.

   OR

   Click in the Contacts sidebar to open the People Finder pop-up.
2. Type the constituent's name in the **Last** and **First** fields, and click.
3. If Intertrac displays possible constituent/address match(es), select the correct address and click **Select**;

   OR

   Click **Create New** and enter the constituent data in the Quick Entry; click **Save**.

How do I respond to a correspondence or email?

1. In the Correspondence form, add the associated constituent and correspondence information.
2. Click **Process** and select **Add Response**.
3. In the Merge Response pop-up, select the **Category** and **Subcategory**.
4. In the **Template** field, select the form letter.
5. (Optional) In the **Batch Name** field, type a name to identify the batch processing group.
6. In the **Send Type** field, select the method you want to use to send the response (print or email).

   Note: **Auto Select** defaults to the same method used by the sender.
7. The **Send To Queue** checkbox is selected by default. (Uncheck this to leave the response in your pending.)
8. (Optional) In the **Subject** field, enter the email subject.
9. (Optional) In the **Enclosure** field, enter any other materials that you are sending.
10. In the Signature field, click and select the signature (if there is more than one signature on file).
11. Verify the correct contact and address are selected.
12. Click **OK**.

The response displays in the Response section of the form.

How do I send a correspondence to the queues?

1. Double-click to open the correspondence.
2. Click **Edit** on the task bar.
3. Click **Process** and select **Send to Queue**.

How do I find queued correspondence?

1. On the navigator, expand the **Queued** views.
2. Select the **Print** or **EMail** queue.
3. On the navigator, under **Filter By...**, select **your name**.

Note: If you edited the response, it may be in the **Awaiting Approval** queue; or, if there was an incomplete address, it may be in the **Exceptions** view.

How do I print a response without queueing?

1. Double-click to open the correspondence.
2. Click **Edit** on the task bar.
3. Scroll down the **Response** section.
4. Click the **Print** button.

How do I respond to a mail campaign?

1. On the navigator, expand **Pending** and select:
   - the **Mail Campaign** view

     OR
   - the **Assigned To** view
2. Select the checkboxes for all campaign correspondence.
3. Click **Process** and select **Add Response**.
4. In the Merge Response pop-up, select the **Category** and **Subcategory**.
5. In the **Template** field, select the form letter.
6. (Optional) In the **Batch Name** field, identify the batch processing group.
7. In the **Send Type** field, select the method you want to use to send the response (print or email).

   Note: **Auto Select** defaults to the same method used by the sender.

   Also, the **Send To Queue** checkbox is automatically selected for merge letters.
8. (Optional) In the **Subject** field, enter the email subject.
9. (Optional) In the **Enclosure** field, enter any other materials that you are sending.
10. In the Signature field, click and select the signature (if there is more than one signature).
11. Click **OK**. intertrac immediately merges the responses and sends the batch to the **Print** or **EMail** queues for processing.
12. A notification pop-up lets you know when the batch is complete. Click the link to view the letters.

InterTrac Word Merge Complete
Click the link to open the merge queue

Basic Casework Skills

About Cases

- A case is a centric document – an "electronic folder" – that you associate other documents to.
- Cases contain dynamic fields that change based on the Category selection.
- You can associate several constituents, agency contacts, and key players to the case.
- You can view all of the contacts and documents associated to the case right in the form.
- Other process forms (grant, project, nomination, appropriation) are similar in functionality.

How do I access my casework?

1. Select the **Casework tab**.
2. Select the **Casework subtab**.
3. On the navigator, select a **view** (ex. **Pending**).
4. On the task bar, select the **Show Mine** checkbox.

How do I create a new case?

From a Casework view:

1. On the navigator, under **Create New...**, click **Casework**.

From another document (linked):

1. In the open document or view, click **Associate** on the task bar.
2. Select **Casework**.

How do I link an appointment, call, or correspondence to a case?

1. Select the case in the view.
2. Click **Associate** on the task bar.
3. Select the document to link (ex. **Correspondence**).
4. If the Select Contacts pop-up displays, select the checkbox(es) for the contact(s) you want to associate to the new document and click **Ok**.

In the document, the casework information will display in the Business Process sidebar. When you **Save**, intertrac links the new document to the case.

How do I associate a constituent to a case?

1. The People Finder automatically pops up;

   OR

   Click in the Contacts sidebar to open the People Finder pop-up.
2. Type the constituent's name in the **Last** and **First** fields and click.
3. If Intertrac displays possible constituent/address match(es), select the correct address and click **Select**;

   OR

   Click **Create New** and enter the constituent data in the Quick Entry; click **Save**.

How do I attach a file to a case?

1. In the view, double-click to open the case.
2. Click **Edit** on the task bar.
3. Scroll down to the **Attachments** section.
4. Click. The Open dialog box displays.
5. Browse to locate the file and select it; click **Open**. The file name displays in the Attachments section.
6. To view the attachment, click. intertrac launches the file application.

How do I add an agency or key player to a case?

1. In the Agency or Key Player sidebar, click to open the People or Agency Finder pop-up.
2. Enter the **Organization** or **Company Name** to find all contacts listed for the agency or company.

   OR

   Enter the contacts's name in the **Last** and **First** fields.
3. Click.
4. When Intertrac displays possible match(es), select the contact and click **Select**;

   OR

   Click **Create New** and enter the contact data in the Quick Entry; click **Save**.
5. For a Key Player, click to enter the contact's role.

How do I promote a correspondence to a case?

1. Open the correspondence you want to promote.
2. Click **Options** and select **Promote.**
3. Select **Casework**.
4. If you want to close the correspondence, select the **Change status...** checkbox.

   Note: intertrac will close the correspondence and remove it from all pending views.
5. Click the **Promote** button. intertrac creates a Case form.
6. In the Workflow section:
   - If there is a point person for this issue, the case is automatically assigned to this staff member.

     OR
   - If there isn't a staff assignment, click and select a staff member (state/district office), then click **OK**.
7. To notify the assigned staff, select the checkbox next to their name. You can also type an email message in the Optional Message field.
8. Enter any additional information you may have about the case in the appropriate fields.
9. Click **Save** to save the case form and send the email notification to the assigned staff.

Basic Constituent Skills

How do I access constituents?

1. Select the **Contacts tab**.
2. Select the **Contacts subtab**.
3. On the navigator, select the **Constituents view**.

How do I create a new constituent profile?

1. On the navigator, under **Create New...**, click **Constituent**.

How do I find a constituent?

1. On the task bar, click in the **Search this view** field.
2. Type the constituent's last name.
3. Click. intertrac returns all matching records for that name.
4. Click to clear the results and view all records.

How do I indicate VIPs and POIs?

1. Select the **VIP** checkbox

   OR
2. Select the **POI** checkbox

Note: The constituent profile and all new associated documents that you create ***after this point*** will indicate the constituent status in the header:

VIP

POI (non-threatening) POI (threatening)

How do I link a document to the constituent?

1. Select the constituent in the view.
2. On the task bar, click **Associate**.
3. Select the document to link (ex. Flag Request).
4. intertrac creates the linked document; the associated constituent data displays in the sidebar. When you **Save**, intertrac links the new document to the constituent.

How do I associate a constituent to an open document (ex. a call or appointment)?

1. In the other document, click in the Contacts sidebar to open the People Finder pop-up.
2. Type the constituent's name in the **Last** and **First** fields and click.
3. intertrac displays possible constituent match(es):
   - Select the correct address and click **Select**;

     OR
   - Click **Create New** and enter the constituent data in the Quick Entry; click **Save**.

Note: If you select Create New and add a new constituent in the Quick Entry, intertrac will *automatically* create a new constituent profile from that data and also associate it to the open document. So you only need to enter the constituent data **once**.