



# Quick User Guide

<b>LOGGING IN .....</b>	<b>3</b>
<b>CHANGING PASSWORD.....</b>	<b>4</b>
<b>CHANGING START SCREEN.....</b>	<b>5</b>
<b>SETTING 'ACTIVE INDIVIDUALS' TEMPLATE.....</b>	<b>6</b>
<b>SETTING 'ACTIVE ORGANISATIONS' TEMPLATE .....</b>	<b>7</b>
<b>SETTING 'ACTIVE CONTACTS' TEMPLATE.....</b>	<b>8</b>
<b>BASIC QUERYING.....</b>	<b>9</b>
<b>ADVANCED QUERYING.....</b>	<b>10</b>
<b>OPENING AND SAVING A QUERY .....</b>	<b>12</b>
<b>VIEWING AND PRINTING QUERY RESULTS .....</b>	<b>13</b>
<b>QUERYING ACROSS SCREENS .....</b>	<b>14</b>
<b>ACTIVITIES.....</b>	<b>16</b>
<b>MAIL MERGING.....</b>	<b>17</b>
<b>BULK EMAILING.....</b>	<b>19</b>

## LOGGING IN

Double-click on **Integra** icon on desktop or in Citrix Program Neighbourhood



Integra



In **Database** field, choose **INTEGRA\_LIVE** from drop-down list



In **User Name** field, type in surname and first letter of first name with no spaces. This will appear in upper case automatically.



In **Password** field, type in password provided by the system administrator. This field is case-sensitive. Passwords can be changed at any time and either upper case or lower case may be used.



Click **OK** or press **Enter**

## CHANGING PASSWORD

Click on **File** menu option



Select **Change Password**



Type in **Old Password** first then **New Password** and then **Confirm New password**



Click **OK** or press **Enter**

## CHANGING START SCREEN

Click on **Window** menu option



Select **Utilities**



Select **User Preferences**



In **User Preferences** dialogue box click on **General Tab** and select **Individual** or **Organisation** radio button to activate this as **Start Screen**



Click **OK** or press **Enter**

## SETTING 'ACTIVE INDIVIDUALS' TEMPLATE

In **Individual** Screen click on **File** menu option



Select **Set Template**



In **Choose Query Template** dialogue box click on ellipse button



In **Look In** field, navigate to **Y:/IntegraFiles/IQF Files** directory



Select **ActiveIndividuals.iqf**



Click **Open**



When **Choose Query Template** dialogue box returns click **OK**



To test, click on  to start query and **Status** field will populate with **Active**

## SETTING 'ACTIVE ORGANISATIONS' TEMPLATE

In **Organisation** Screen click on **File** menu option



Select **Set Template**



In **Choose Query Template** dialogue box click on ellipse button



In **Look In** field, navigate to **Y:/IntegraFiles/IQF Files** directory



Select **ActiveOrganisations.iqf**



Click **Open**



When **Choose Query Template** dialogue box returns click **OK**



To test, click on  to start query and **Status** field will populate with **Active**

## SETTING 'ACTIVE CONTACTS' TEMPLATE

In **Contact** Screen click on **File** menu option



Select **Set Template**



In **Choose Query Template** dialogue box click on ellipse button



In **Look In** field, navigate to **Y:/IntegraFiles/IQF Files** directory



Select **ActiveContacts.iqf**



Click **Open**




When **Choose Query Template** dialogue box returns click **OK**



To test, click on  to start query and **Contact Status** field will populate with **Current**

## BASIC QUERYING

Click on  to begin a query. Fields that can be queried will have a blue border



Place cursor on field to be queried



Enter search criteria using a combination of key words, letters (not case-sensitive) and Wildcard characters %





Queries can be performed using multiple criteria in any number of fields and across any number of tabs




Simply enter criteria into each required field



Click  or press **Enter** to run the query or click  to cancel the query




To move between returned records, click on  to move forward and click on  to move backward

**REMEMBER:** Number of records returned can be seen on the bottom right-hand corner of the screen

## ADVANCED QUERYING

It is possible to perform a query with more than one criterion in a single field

Click on  to begin a query. Fields that can be queried will turn white



Place cursor on field to be queried



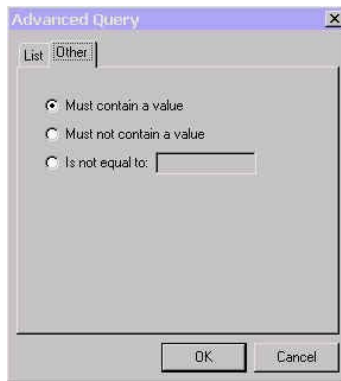
Right mouse click in field and select **Advanced...** from the menu to access the **Advanced Query** options



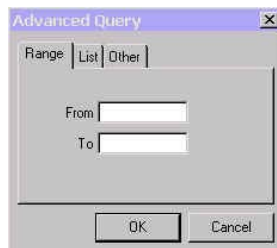
**List Tab** available on any field – enter criteria on white line and press **Tab** key to move value to bottom window.  
Enter all criteria in this was



**Other Tab** available on any field - contains three options for specifying if the field must be blank, must not be blank or must not contain a specific value





**Range Tab** available only on numeric and date fields – can enter a **From** and **To** numeric range or **Start** and **End** date range




Queries may contain any number of basic criteria and any number of advanced criteria within the one query



Click  or press **Enter** to run the query or click  to cancel the query

## OPENING AND SAVING A QUERY

It is possible to save the criteria of a query if it needs to be run repeatedly

Click on  to begin a query. Fields that can be queried will turn white



Enter search criteria into required field or fields



Click  or press **Enter** to run the query



Click on  and when dialogue box appears enter file name for query criteria and click on **Save**




Click on  to open a query criteria that has already been saved




Locate the **Saved** query to be open and click **OK**



When you are returned to the screen, click  or press **Enter** to run the query

## VIEWING AND PRINTING QUERY RESULTS

When a query has been run, the resulting records appear on screen in **Form View**. This view gives full details of one record at a time.

Click on **List View**  to view the complete result set of the query



The very first time **List View** is used, it will not contain any information. Right mouse click on grey bar underneath the toolbar and select **Add Columns** from menu to add columns to **List View**



A pop-up box appears with a list of all available fields or columns that can be selected. To add a column, double-click on each required column name or highlight one column at a time and click on **Add**.



Columns can be removed from **List View** by right clicking in required column and select **Remove Column** from menu



To change the order in which the columns appear in **List View**, move the cursor along the grey column heading until the cursor changes to  and drag column to expand or reduce



To sort results of the query in **List View**, right mouse click on column heading that data is to be sorted by and select **Sort Ascending** or **Sort Descending** from menu. **Extended Sort** option allows a sort to be performed on any or all of the columns that have been selected.





To change from **List View** back to **Form View**, double-click on required row to see all the details for that record

OR

Highlight row and click on **Form View**  to view record in full detail.




To print results of query, go to **List View** and click on  The report will open in an Internet Explorer window and can be printed or emailed 

## QUERYING ACROSS SCREENS

Queries can be performed using criteria in any number of fields, across any number of tabs and across the **Organisations** and **Individuals Screens**

A linked query needs to begin in the **Organisations** Screen. If the **Organisations** Screen is not open, click on the **Window** Menu, select **Membership** and then select **Organisation**



Click on  to begin a query. Fields that can be queried will have a blue border



Enter criteria into required field or fields



Click  or press **Enter** to run the query



Click on **Contacts Tab**



Click on  next to '**Call Contact Maintenance with Organisation Criteria**' to open **Contact** Screen, but keeping list of records returned from original query




When pop-up message appears, select on **Yes** or **No**, depending on what query list you wish to return.

Clicking on **Yes** will automatically return **ALL Contact** records for the chosen **Organisations**.

Clicking on **No** means you need to run a new query in the **Contact** Screen to specify which **Contact** records you want to return.



If **No** is chosen, in **Contact Screen**, click on  to begin another query.



Enter criteria into required field or fields



Click  or press **Enter** to run the query



Click on  next to '**Call Individual Maintenance With Contact Query List**' to open **Individual** Screen, but keeping list of records returned from the **Contact** Screen



When pop-up message appears, select on **Yes** or **No**, depending on what query list you wish to return.

Clicking on **Yes** will automatically return **ALL Individual** records for the chosen **Contacts** (and original **Organisation** query).

Clicking on **No** means you need to run a new query in the **Individual** Screen to specify which **Individual** records you want to return.



If **No** is chosen, in **Individual Screen**, click on  to begin another query.




Enter criteria into required field or fields




Click  or press **Enter** to run the query

## ACTIVITIES

Run a query  to find the record that you would like to add the Activity against and click on the **Activities Tab**



To add or insert a activity, click on first row of the **Table** and click on 

OR

In **Table**, right click on the grey box on the left-hand side of the row, then select **Insert** from the Menu



Choose the **Activity Type** from the list that appears




Choose **Category** (Department) from drop-down list



Enter any other data that you require, such as **Comments**



Click on  to save your changes



**Date, Time** and **Logged By** fields are automatically populated



To link a Document or Email to the Activity, click on  either in the table or beside the **Document** field




Select **Document...** or **Email...** from the Menu




Located your Document or Email, highlight it and click **Open**



Click on  to save your changes

## MAIL MERGING

Usually **Mail Merges** are run from the Individual Screen, but it is also possible to run **Mail Merge** from the Organisation and Contact Screens

Run a query  in Individual Screen to find the records that you would like to **Mail Merge**



If a Mail Merge has been set to **Main**, click on  to launch **Mail Merge**

OR

If a Mail Merge has not been set to **Main**, click on **Mail Merge** menu option and select **Standard Individual**



A pop up box appears confirming number of records being passed – click **OK**



Record **Activity** if required



When Word opens, click on **Enable Macros**



Locate the tab that has your **Department** name and click on it.



Open required Document by double-clicking on it or highlighting it and clicking **OK**



When Document opens, click **Yes** to **Merge Now** if Merge fields have already been inserted and you are ready to Merge

OR

Click **No** to **Merge Now** if Merge fields have not been inserted and you need to insert them



If you choose **No**, click on the **Insert Merge Fields** button on the left-hand side of the tool bar and the list of **Mail Merge** fields will appear



Choose required fields by double-clicking on each or highlight it and click **OK**



When all fields are selected, click on **Merge Now** button on the tool bar




When pop-up box appears, click **Merge**




The Merged document that is ready to be printed or saved

## BULK EMAILING

Usually **Bulk Emails** are run from the Individual Screen, but it is also possible to run **Bulk Emails** from the Organisation and Contact Screens

Run a query  in Individual Screen to find the records that you would like to send an Email to



Click on  to start **Bulk Email** tool



### RECIPIENTS TAB:

Tick **Include All** check box to send the message to all Recipients with an Email Address or tick individual check boxes if you want to pick and choose who to send the email to

Choose whether you wish to only see records with an Email Address by selecting **Only Show Records that have an E-mail Address** or seeing all records, including those without an Email Address, by selecting **Show All Records** - you can type in the Addresses yourself

Tick the **Call Activity Log** option



### COMPOSE PLAINTEXT MESSAGE TAB:

This tab does not allow formatting of any kind

Choose to send a non-personalised message by selecting **Send Blind Carbon Copy** or A personalised message using Integra Merge fields by selecting **Send Multiple E-mails**

If you select **Send Multiple E-mails** option, the Merge fields need to be inserted into the body of the message by double-clicking on them

Enter heading of message in **Subject** line and type message in white window



### COMPOSE HTML MESSAGE TAB:

This tab allows formatting

Choose to send a non-personalised message by selecting **Send Blind Carbon Copy** or  
A personalised message using Integra Merge fields by selecting **Send Multiple E-mails**

If you select **Send Multiple E-mails** option, the Merge fields need to be inserted into the body of the message by double-clicking on them

Enter heading of message in **Subject** line and type message in white window



### ATTACHMENTS TAB:

Attach any documents required by clicking on **Browse** button to search for them and clicking on **Add this file to the Attachments list** button to move them to the lower window



### SETTINGS TAB:

In **System Settings** area, fill in **From** field with your full Email Address

In **System Settings** area, fill in **SMTP BCC** field with your full Email Address only if you want to be copied in on the email being sent

Set **Temporary Folder** to **C:/Temp** by clicking on **Browse** button



Click on **Send** or **Send Later**

