

#### Navigating the GoCM (Navigation 100)

#### **Prerequisites**

- 1. Basic knowledge of web browsing is assumed, such as being able to click on a link or save a bookmark.
- 2. As a registered user, you will need a username and password.

#### Overview

The GoCM application runs within your Web Browser, so much of the navigation will be familiar to anyone who has surfed the World Wide Web. Save time by taking a few minutes in this module to familiarize yourself with the layout of the site and learn where to find what you are looking for.

Note: This version is for registered users. Another version, for non-registered users, is available and can be accessed via the Training Main Page.

This module is designed to teach you to navigate the GoCM. The numerical menu bar above this text indicates which section of the module you are in.

- 1 Prerequisite, Overview and Module Objectives
- 2 Step-by-Step process with screen shots and demonstrations
- 3 Review and Try it Now
- 4 Job Aids

While you can skip menu items, we recommend that you follow the natural progression of the module as it will help you better understand how to work in GoCM.

#### **Objectives of this Module**

Navigating the GoCM Catalogue is designed to assist you in using the GoCM by describing the layout of the site and highlighting important features.

Demonstrations are incorporated in this module to show you examples of how to navigate.

The objectives of this module are to allow users to:

- Log On and Log Off
- Navigate the Main GoCM Screen
- Get Help
- Understand key icons and symbols After reviewing this section and getting familiarized with the various elements of the screen, refer to the Searching and Shopping modules for step-by-step procedures.

Additional tips are provided in the *Helpful Tips* section of this module, including:

- Avoiding problems by learning additional browser tips
- Additional icons and symbols used
- Do not use the Back button in your browser menu.

# Logging On and Off of the GoCM

Go to the GoCM Web Site at http://gocm.gc.ca.

Click on the English Button to launch the GoCM application.

You are presented with a log on screen as shown in the graphic below. Enter your username and password, and then click on the *Log On* Button.

*	Gouvernement du Canada	Government of Canada				Canada
Marc	DGC • Go thé en direct du g ernment of Canad	gouvernement di	I Canad	Ja T		
Utilisateurs inscrits / Registered Users						
	ID utilisateu	r/UserID *				
	Mot de pas	se / Password *				
		Aide pour le mot de p	asse	Passw	ord Help	
	Utilisateurs	non inscrits / Nor	n Regist	ered User	<u>'S</u>	
	Courriel / E	mail:*				]
	O France	ais 💿 English				
			C	onnexion	/ Log on	

You will now see the GoCM Main Screen.

Notice that the link to log off the GoCM is on the top right hand corner of the screen, as shown in the graphic below. When you are ready to Log Off, click on the words *Log Off*.

Government Gouverneme of Canada du Canada	nt		Canada				
	GoCM Government of Can	ada Marketplace	Help   Personalize   Log Off				
Go Shopping My Purchase Orders	My Reports						
Search for Goods   Check Order State	us						
Help Linka 📟	Shop in 3 Steps						
Shopping Cart Help (English)     Shopping Cart Help (French)	<u> </u>	- 2	<u> </u>				
	Select Goods/Service S	topping Cart (Empty)	Complete and Order				
In this step, you can search for goods/services and add them to your shopping cart. In step 2, you can display your shopping cart and check it. In step 3, can order your shopping cart.							
	You can add items to the shopping cart using the following metho	da:					
	Search in Individual Catalogs:						
	M Old Purchase Orders and Templates	Internal Goods/Services					
	All GoCM (includes items outside your region/department)	S My GoCM					
	Not found what you were looking for? Use the following order to	lorm:					
	Describe Requirement						
			< Back Continue >				

A pop-up window will appear asking you "Are you sure you want to log off?", as seen in the graphic below.

🕙 GoCM Marketplace Web Page Dialog 🛛 🛛 🔀						
Are you sure you want to log off?						
http://cmodcazd14.gocm 🍘 Internet						

Click on Yes to log off, click on No if you want to continue in GoCM.

*Tip:* Remember that Logging Off, you will lose any work that you have not saved.

*Warning:* Do not try to log off the GoCM by shutting down your browser window.

#### The Main GoCM Page

Let's spend a moment looking at the GoCM Main Page, highlighting its important elements.

We have already discussed the *Log Off* link. The main *Help* link and the context sensitive help links are discussed later in the section Getting Help. The graphic below shows the tabs included on the GoCM main page.

Government Gouverneme of Canada du Canada	nt		Canada
	GoCM Government of Cana	ida Marketplace	Help   Personalize   Log Off
Go. Shopping My Purchase Orders Search for Goods   Check Order Stat			
Help Links	Shop in 3 Steps		
Shopping Cart Help (English)     Shopping Cart Help (French)	<u>⊢</u> 1	- 2	<u> </u>
	Select Goods/Service Sh	opping Cart (Empty)	Complete and Order
	In this step, you can search for goods/services and add them to you can order your shopping cart.	r shopping cart. In step 2, you can display yo	ur shopping cart and check it. In step 3, you
	You can add items to the shopping cart using the following method	ĸ	
	Search in Individual Catalogs:		
	Cid Purchase Orders and Templates	ڬ Internal Goods/Services	
	Al GoCM (includes items outside your region/department)	La My GoCM	
	Not found what you were looking for? Use the following order fo	rm:	
	Describe Requirement		
			< Back Continue >

#### Tabs

Notice the Tabs at the top of the screen. Each Tab presents a different function in the GoCM.

- 1. Use the *Go Shopping* tab to:
  - Search for goods and services,
  - Create, fill and save shopping carts, and
  - Create purchase order documents.
- 2. Use the *My Purchase Orders* tab to:
  - Print or e-mail purchase order documents.
  - Search for your old purchase orders.
- 3. Use the *My Reports* tab to:
  - Run reports on purchase orders and shopping carts

*Tip:* When you move between tabs, while in your shopping cart, it is best to hold your shopping cart before switching. You can learn more about this in the *Shopping 100* module.

#### The Shopping Wizard 1-2 3

By clicking the *Go Shopping* tab, you enter the Shopping Wizard 1-2-3. Use the Shopping Wizard 1-2-3 to move back and forth between searching, managing your shopping cart and ordering. You'll use it most when ordering multiple line items.

Go Shopping My Purchase Orders My Reports N	/y Settings	
Search for Goods   Check Order Status		
Shop in 3 Steps		
1	2	3
Select Goods/Service	Shopping Cart (Empty)	Complete and Order
In this step, you can search for goods/services and add them	to your shopping cart. In step 2, you can display your shopping cart and ch	eck it. In step 3, you can order your shopping cart.

For example, if you are responsible for restocking an office supplies cabinet every week, you will likely be ordering several items at a time, such as sticky notes, pens, and paper. You can order them all in one shopping cart, even if they come from different suppliers, are charged to different accounting codes and even if they have different delivery addresses.

In this example you'd search for sticky notes in step 1, and add them to your cart which takes you to step 2. But you are not done yet, you need to order pens and paper also. Simply click back on the "1" in the Shopping Wizard and search for the next item. Keep repeating until you've added everything you need to your cart.

When your shopping cart has everything you need, you can click on step "3" to create the purchase order document(s).

*Tip:* When you are in the Go Shopping Tab. this wizard will always be present at the top of your page.

*Tip:* Notice the Shopping Cart "2" maintains a count of how many items are in your cart.

*Tip:* Notice the Shopping Cart "2" and Order "3" symbols are not active when your cart is empty.

For more information on the Shopping Wizard, we encourage you to take the Searching and Shopping Modules.

# Getting Help

Help is only a few clicks away.

#### **General Help**

For General Help, you can click on the Help link at the top right hand corner of the page, as highlighted in the graphic below. A new page will open in your browser, and the GoCM application will remain open in the original window.

		Help	Personaliz	e   Log Off
	Go Shopping My Purchase Orders My Reports			
	Search for Goods   Check Order Status			
2	Shop in 3 Steps			Help
	<u>⊢ 1</u> 2	3 —		
	Select Goods/Service Shopping Cart (Empty) Comple	te and Ord	ier	
	In this step, you can search for goods/services and add them to your shopping cart. In step 2, you can display your shopping cart and check it. In step 3, you can order Step 1: Select Goods/Service You can add items to the shopping cart using the following methods:	your snop	ping cart.	
	Search in Individual Catalogs:			
	X Old Purchase Orders and Templates			
	La All GoCM (demo system - CC1)			
	La My GoCM			
	Not found what you were looking for? Use the following order form:			
	Describe Requirement			
			< Back	Continue >

#### **Specific Help**

For Help specific to the screen you are on, click on the links at the left hand side of the page as displayed below. If these links are not displayed, click the blue triangle under the words "Search for Goods" on the far left of the screen. You'll notice that a link for Help is available in your choice of English or French. A new page will open in your browser, and the GoCM application will remain open in the original window.

		ouvernement u Canada			Canada
		The second second	GoCM Government of Ca	nada Marketplace	Help   Personalize   Log Off
Go Shopping			My Reports		
Search for Go	ada   Chec	k Order Status			
OD			Shop in 3 Steps		
	Cart Help (Engli Cart Help (Fren		<u>⊢</u> 1	_ 2	3
			Select Goods/Service	Shopping Cart (Enpty)	Complete and Order
			an order your shopping cart. Step 1: Select Goods/Service		
			You can add items to the shopping cart using the following meth	ods:	
			Search in Individual Catalogs:		
			M Old Purchase Onlers and Templates	ڬ Internal Coods/Cervices	
			Sa All GoCM (includes items outside your region/department)	🕍 My GoCM	
			Not found what you were looking for? Use the following order	r form:	
			Describe Requirement		
					< Back Continue >

If you would like to reduce the size of the Help Link on the left, you can either hide it temporarily by clicking on the solid triangle on the top right corner of the help pane. Or you can reduce its width gradually by clicking on the two triangles on the top left of the help pane, as shown in the above graphic.

View demo Navigating through GoCM

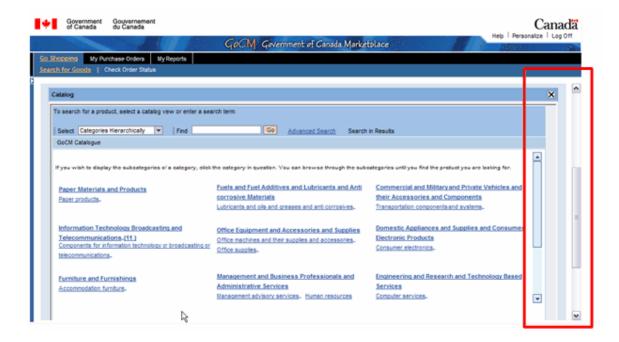
# **Understanding Key Icons and Symbols**

After reviewing this section and getting familiarized with the various elements of the screen, refer to the Searching and Shopping modules for step-by-step procedures.

**Catalogue Selection Area** – If you would like to search an individual catalogue, click on which catalogue you require from the list, shown in the graphic below.

Government of Canada Gouvernement du Canada			Canada
	GoCM Government of	Canada Marketplace	Help   Personalize   Log Off
Go Shopping My Purchase Orders My Reports Search for Goods   Check Order Status			
Shop in 3 Steps			
1	2 _		<u> </u>
Select Goods/Service	Shopping Cart (Emp	(Y)	Complete and Order
In this step, you can search for goods/services and add them to your of Step 1: Select Goods/Service	hopping cart. In step 2, you can de	play your shopping cart and check it. In step	3, you can order your shopping cart.
You can add items to the shopping cart using the following methods:			
Search in Individual Catalogs:			
M Old Purchase Orders and Templates	Linternal Goods/Services		
All GoCM (includes items outside your region/department)	L My GoCM		
Not found what you were looking for? Use the following order form	κ.		
Describe Requirement			
			< Back Continue >

**Panes** – If you see more than one set of scroll bars on the right side of the screen, it means you are viewing a pane within a pane. All scroll bars can be adjusted for optimal viewing.



**Input boxes** – If you would like to search for an item, type your item in the input box located to the right of the find field. To start your search, you have the option on pressing enter on your keyboard or clicking the yellow *Go* button to the right of the input box.

To search for a product, select a catalog view or enter a search term								
Select 💌	Find	Go	Advanced Search	Search in Results				
GoCM Catalogue - Paper Materials and Proc	ew for "Printing and writing paper"							

#### **Search Results**

- *Rows per Page* If your search has many results, you have the option of selecting 5, 10, 20, or 50 results per page in the upper left corner of the graphic below.
- *Paging Down through Search Results* If your search has many pages of results, you can click the down arrow in the upper right corner of the graphic below to page down through your results.

**Tip:** Notice the Agreements without price and an order unit of *ST*; these are called Class 3 Agreements. Agreements with a price and an order unit are called Class 1 Agreements. You can find more about the differences between Class 1 and Class 3 agreements in the Searching module.

atalog									
To search for a	roduct, select a catalog view or enter a search term								
Select Find Go Advanced Search Search in Results									
Results of stan	ard search for search term "statistical services laserjet 1000"					_			
Rows per Pag	. 10 💌					🔺 Page 1 of 13 💌 🖉			
Ep quantity	Uescrpton \$	Supplier P \$	Image	Price	\$	0r \$	Ha \$	Action	1
1	STATISTICAL SERVICES		Ŵ	0.00 CAD		ST	No	₩	
1	Toner Cartridge -F-60/65/M-4500/4700/V-190/MA-1000 -THERMAL TRANSFER	PF155		72.21 CAD		EA	No	7	

**Sort by Arrows** – If you would like to sort your list in descending order, click the up arrow next to the title heading. If you would like to sort your results in ascending order, click the down arrow located next to the title heading. This would be particularly important if you wished to sort by price.



**Pull Down Lists** – Simply click the down arrow to the right of the input box and display the specific options for a field.

Catalog
To search for a product, select a catalog view
Select Categories Hierarchically
GoCM P
Categories Hierarchically
Display Categories as Index

**Breadcrumb Navigation** – If you want to go backwards in your search, breadcrumb navigation helps you do this quickly.

As the example below shows, a search was performed for an "expedition" and "upland". Next, a comparison display was conducted from the results produced. And finally, we chose the "expedition". You can go back and review the results by clicking on "Results of standard search for search term "expedition upland", instead of pressing *Back* on the GoCM screen.

Select		•	Find			Go	Advanced Search	Search in Results
Results (	of standard search	for search term	"expedi	tion upland'	- Comparison	Display ·	- ECO conv- 2004 5.4	L Ford Expedition

*Warning:* Do not use the *Back* button on your browser's window to move backwards when using the GoCM.

**Item Detail Links** – If you would like details on the item you want, you can click on description link, as shown in the graphic below. This information is government approved and will open up in the GoCM screen.

Ro	vs per Page		A Page	1 of 9	98 💌	
₽	Quantity	Description	Sup ≑	Price 👙	. \$	. 🗢
	1	Toner Cartridge -FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN - YELLOW	LC41Y	12.05 CAD	EA	No
	1	Toner Cartridge -FAX 1040CIME0210CIME03240CI ME03340CIVME0420CIVME05440CIVME05440CIVME0020CIV - DLACK	LC41BK	21.68 CAD	EA	No
	1	Toner Cartridge -FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN - CYAN	LC41C	12.05 CAD	EA	No
	1	Toner Cartridge -FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN - MAGENTA	LC41M	12.05 CAD	EA	No

**Attachments** – If you would like to view the details of the agreement, click the Attachments link shown in the graphic below. The agreement will open in a new window in Adobe Acrobat format.

	Catalog						×
	To search for a product, se	elect a catalog view or enter a	a search term				
	Select	▼ Find	Go	Advanced Search	Search in Results		
	Results of standard searce	ch for search term "toner cart	tridge fax" - Toner Cartridge -FA	AX 1840C/MFC210C/MF	C3240C/ MFC3340CN/MFC420C	N/MFC5440CN/M FC5840CN/MFC620CN	-
	Description:	Toner Cartridge -FAX 184	0C/MFC210C/MFC3240C/ MFC33	40CN/MFC420CN/MFC	5440CN/M FC5840CN/MFC620CI	Quantity 1	
I	Supplier Part Number	LC41Y				Attachments PDF copy of	
I	Price	12.05 CAD				agreement	
I	Order Unit	EA				Supplier URL Kerr Norton (external	
I	Pkg Info	packed individually				to GoCM)	

**Supplier URL** – If you would like additional information on the supplier of your item, you can click the Supplier URL link, as shown in the graphic below. This information is not government approved and will open in a separate window.

Catalog						
To search for a product, select a catalog view or enter a search term						
Select	Find	Go Advanced Search	Search in Results			
Results of standard search for search term "toner cartridge fax" - Toner Cartridge -FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN - YELLOW						
Description: Supplier Part Number Price Order Unit Pkg Info	Toner Cartridge -FAX 1840C/I/IFC210C/ LC41Y 12.05 CAD EA packed individually	MFC3240C/ MFC3340CN/MFC420CN/MFC	5440CN/M FC5840CN/MFC620CN	Quantity     1       Attachments     PDF copy of agreement       Supplier URL     Kerr Norton (external to GoCM)		

**Yellow Buttons** – Buttons that are active and perform further actions, are yellow, as the examples below show.

Add to Shopping Cart Go

**Greyed Out Buttons** – Buttons are inactive and perform no action, if they are greyed out as the examples below show.



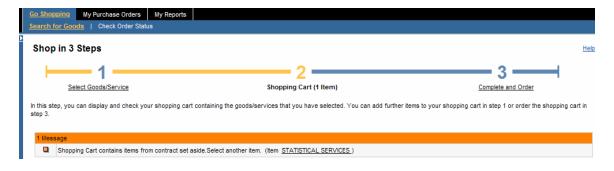
Information Boxes - Information boxes are text boxes that include information about specific fields.

Supplier Operating Name	ECO Fuel Systems Inc.	
Supplier Legal Name	ECO Fuel Systems Inc.	
Standing Offer Number	E60HP-06ATF2/001/HP	
Amendment	001	
Agreement Type	NMSO	

**Warning Symbols** – If you *Check* your order and a warning message appears, you need to make the necessary changes before your order is finalized, as shown in the graphic below.

Welcome Mr. Tim E	CSHOP002		н	elp   Log Off
Go Shopping Search for Goo	My Purchase Orders My Reports My Settings			
Shop in 3	Steps			Help
	-1	2	3	
<u>Sei</u>	ect Goods/Service	Shopping Cart (1 Item)	Complete and Order	
In this step, you step 3.	can display and check your shopping cart containing the	goods/services that you have selected. You can add furth	er items to your shopping cart in step 1 or order the shopp	ing cart in
1 Message				
<b>A</b>	Shopping Cart value exceeds the call up limitation.			

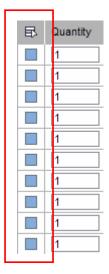
**Error Symbols** – If you *Check* your order and an error message appears, you need to make the necessary changes before your order is finalized, as shown in the graphic below.



**Shopping Cart Icon** – By clicking the shopping cart icon, you will add that specific item to your shopping cart.



**Selection Boxes** – If you would like to make multiple selections in your list, you can use the blue selection boxes located to the immediate left of the Quantity column for each item.



**Select All or Deselect All Button** – If you would like to select all or deselect all of the items in your list, you can use the Select All or Deselect All button, located to the left of the word *Quantity*.



**Viewing Glasses Button** – If you wish to view the details of your shopping cart, you click on the Viewing glasses icon, under the Action Items column in your shopping cart. Shown in the graphic below.

# $\mathcal{G}_{\mathbf{F}}$

**Magnifying Glass Button** – If you wish to view the item details for a specific item, you click on the Magnifying glass under the Action Items column in your shopping cart. Shown in the graphic below.



**Copy Button** – If you wish to copy an item in your shopping cart, you click on the Copy Button under the Actions Items column in your shopping cart. Shown in the graphic below.



**Trash Button** – If you wish to delete an item out of your shopping cart, you click the Trash Can Button under the Action Items column in your shopping cart. Shown in the graphic below.



**Expand a section twisty** – If you would like to expand a section to see the specific information held in that section, you click the right arrow that is to the left of the section name. Shown in the graphic below.

**Collapse a section twisty** – If you would like to collapse a section to hide the specific information held in that section, you click the down arrow that is to the left of the section name. Shown in the graphic below.

Item Details: Toner Cartridge -FAX 1840C/MFC210C/MFC32					
▶ Basic Data					
▶ Cost Assignment					
Documents and Attachments					
Ship-To Address/Performance Location					
Sources of Supply / Service Agents					
Goods/services will be ordered at the following vendor:					
Vendor KERR NORTON					

# **Review and Try it Now**

In this module you learned how to log on and off the GoCM, how to get Help, and how to navigate through the various functions. You were also shown and described some icons and symbols used in GoCM.

Additional training tips on GoCM Navigation can be found in the next section – '*Helpful Tips and Other Job Aids*'.

The next module, *GoCM Personalizing (Personalzing 100)*, will show you how to personalize your GoCM settings.

Congratulations, you now have the basic skills to go on to the Personalizing Module.

#### Try It Now

You now have the option to try some basic navigation in the GoCM

To complete the exercise, you will need a GoCM username and password.

#### Exercise:

Log onto GoCM, view the various help screens, various tabs, log off

- Log On
- Open the General Help Screen, review its contents and close the window
- Open the Context Sensitive Help Screen, review its contents and close the window
- Click on each of the 'Go Shopping', 'My Purchase Orders', and 'My Reports' tab, view their content
- Log Off

### Helpful Tips and other Job Aids

The following are several job aids that relate to the content of this module. These are additional materials to assist you with other topics not covered in this module around GoCM Navigation. Feel free to read through the material if you wish; otherwise, you may access this content in the training help section in the main menu.

How to set the GoCM recommended browser settings in Internet Explorer Version 6.0.2 (SP1) for Windows 2000 How to set the GoCM recommended browser settings in Internet Explorer Version 6.0.2 (SP2) for Windows XP How to set the GoCM recommended browser settings in Netscape Version 8 or later

Demo presented in this module FAQs related to Navigation <u>Printable user guide for Navigating the GoCM Catalogue</u> <u>Glossary of Terms</u> <u>Quick Card on Navigation</u>