Administrator Startup Guide

1. First Task - Setup Users

Setup your user accounts on the Manage Users screen.

- You'll need Email, First and Last Name to setup a user.
- After creating the user, click 'Invite' link to send email so they can create their own password and login to website.
- We recommend the use of two Administrators for your inReach Network system, in the event that one of the Administrators is not available.

2. Second Task – Case Administrator

Ensure you have the Case Administrator role setup.

- Did your organization purchase the Case Module? If so, you will be receiving cases (applications for assistance) from your public site.
- All new cases are assigned to the Case Administrator role.
- New cases are visible on the Case Administrator's 'My Cases' screen, but can also be found on the 'Search Cases' screen.

3. Third Task – Inventory

Create your Bulk Categories and Bookkeeping Codes.

- Did your organization purchase the Inventory Module? If so, you'll need to assess your current Bulk inventory and unit value.
- Create your Bulk Categories based on how you want to track your inventory.
- Create your Bookkeeping Codes to match the codes in your accounting system. (optional).

4. Fourth Task – Volunteers

Setup your list of volunteers.

- Did your organization purchase the Volunteer Module? If so, you'll need First and Last Name to setup a volunteer.
- Be sure to collect volunteer email addresses.
- With the 'Copy Email Addresses' feature you can either copy all or a subset of email addresses to the clipboard and paste into any email application (e.g. Outlook)

Handy Tips

- Once you have completed your initial setup, you can view the training videos (via the Support screen) to learn how to use your inReach Network system in more detail.
- To use the inReach Network you'll need a computer with a web browser (e.g. Chrome) and internet connectivity. We highly recommend using a computer with a regular-sized monitor, as opposed to a phone or tablet. There's a lot of data in the system and you'll have a much better experience on a bigger screen.
- If you have any issues or questions regarding the inReach Network functionality, we're just a phone call or email away.