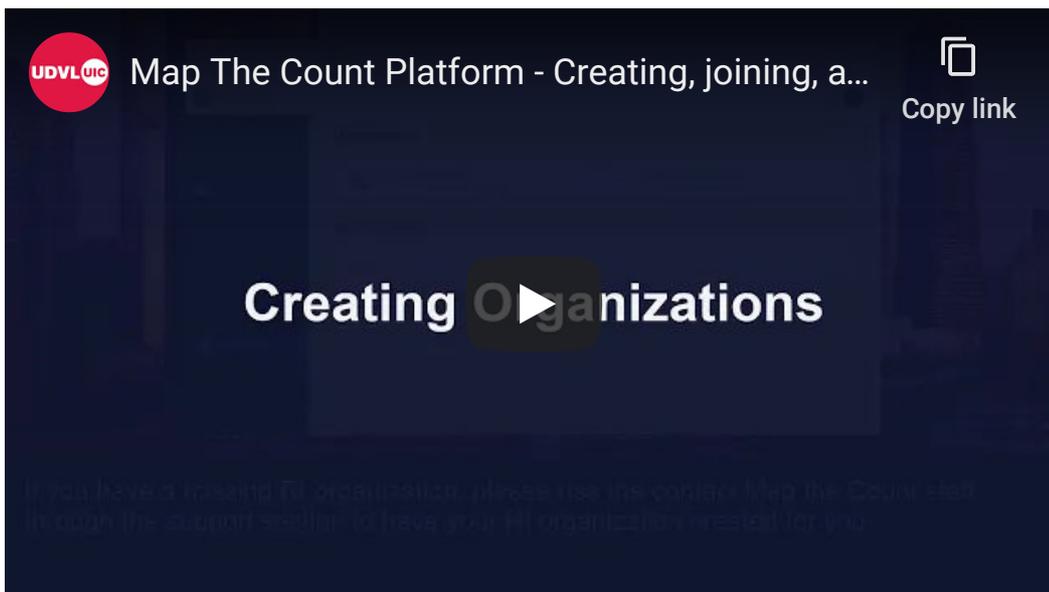


Creating, joining, pairing, and managing organizations

It is important to maintain proper management of your organization on the platform, which will make it easier to manage outreach activities your users submit to your organization. This resource will guide you through the process.



Before doing any of the steps on this page, you should first register for the site. There is a guide for that located [here](#).

Joining user accounts to an organization

Why Join?

Users joined to an organization can see all activity submitted to the organization, including that of other users, and activity goals set by administrators of the organization. This will make it easier for users to keep track of outreach and reporting.

Join Codes

Join codes are used to join a user account to a specific organization. The code is different for every organization.

If you are a regular user who wants to join an organization, contact the admin for the organization.

If you are the admin and want to know where to find the join code, follow these steps.

Click on the “organizations” tab on the left bar.

1. Click on the name of the organization under the “my organizations” heading that you want to access.
2. On the top bar, click on “users”
3. Click on “invitation information”
4. The first field has the join code.
5. The second field has a link you may share with new, unregistered users of the platform. If you share with the link, they will automatically be joined to the organization.



Joining an organization



There are two ways to join a user account to an organization:

1. When a user registers for the website:
 1. If the user registers using a hyperlink provided by an administrator of the organization, the user will join the organization automatically upon completion of registration.
 2. Entering the name of the organization and its join code manually when registering.
2. Requesting to join an organization after registration. To do this, follow these steps:
 1. Click on the “organizations” tab on the left bar.
 2. Click on “Join an organization” on the top of the screen.
 3. Enter the name of the organization and the join code. If you do not know the join code, contact the admin of the organization.

Admins of organizations will have to approve user requests to join. These requests show up in the moderation tab.

Creating an organization

Your user account needs to be verified before you will have the ability to create an organization.

To create a new organization:

1. Click on the “organizations” tab on the left bar.
2. Click on “create an organization” on the upper right hand side of the page.
3. Enter the new organization name. If you have contracts with more than one RI, you will need a separate organization for each contract. In the organization name, indicate the contract affiliation (for example: “Subrecipient Name – RI: UIC”)
4. Create a join code for your new organization.
5. If you know the pairing code for your RI, enter the pairing information. You can always pair later if you do not have that information readily available.
6. Press “create organization.”

Pairing to another organization

Why pair?

After users enter activity trackers and they are approved via moderation, if the organization is paired with an RI, then the results are automatically sent to the RI organization, which makes it easy for RIs to then report back to IDHS and to know which sub was responsible for the activity. This reporting is critical to inform funding decisions by IDHS.

Pairing organizations

There are two ways to pair a sub organization to an RI organization.

1. If you are the admin of the RI organization:
 1. Click on the organizations tab.
 2. Under “my organizations”, click on the name of the RI organization that you want to pair to a sub.
 3. On the top bar, click on the “associations” tab.
 4. Click on “pair child organization”.
 5. Select the organization from the list and hit “pair organizations”.
2. If you are the admin of the sub organization:
 1. Click on the “organizations” tab.
 2. Under “my organizations”, click on the name of the sub organization that you want to pair to an RI.
 3. On the top bar, click on the “associations” tab.
 4. Click on “pair parent organization”.

5. Select the organization from the list and hit “pair organizations”. If you are not already the admin of the RI organization, you will need to get the pairing code from the admin of the RI organization.
6. An admin of RI organization will have to approve the pair request. These requests show up in the moderation tab.

Managing users

Admin users of an organization have the ability to join or remove users from the organization and to change the admin status of other users joined to the organization.

Joining users is covered earlier on this page.

To edit the current users of the organization:

1. Click on the “organizations” tab.
2. Click on the name of the organization under the “my organizations” heading that you want to access.
3. On the top bar, click on “users”.
4. Under the “actions” heading, click on the blue “manage” text to the right of the name of the user you want to edit.
5. You can choose to remove the user or change admin status here.

Managing activity trackers

Admins for an organization have the responsibility to moderate activity trackers submitted to the organization. Admins also can see all of the results and can filter by user who submitted them, type of tracker, or status of tracker. They also may download all the results aggregated and ready to copy into a monthly IDHS activity report. Admins can also set goals for outreach activities.

[Home](#)

[Maps](#)

[Events](#)

[Resources](#)

[Contact](#)

© Map the Count 2019. [Terms & Privacy](#)