

Platform administration

How to administer the platform

As a Regional Intermediary administrator, you'll need to regularly go in and approve submissions by field workers. This resource will walk you through that process.

Registration

Regional Intermediary Admins will be sent an email with a link to register. If you have not received an email or have questions, please contact support@mapthecount.zendesk.com.

Moderation

When someone requests to join an organization or submits an activity tracker, it will need approval by an admin from that organization. As an admin once you are signed in; you can view, approve, request changes, or deny a request/submission in the Moderation section. You can view Pending, Changes, Accepted, and Denied actions.

Once a request or submission has been approved or denied, it cannot be edited.

Approving, Requesting Changes, or Denying requests or submissions

- Under the Pending category you will see a list of items that are pending an action.
- Activity tracker submissions can be viewed by clicking on the message of the activity tracker you want to view.
- Next to each activity tracker you will have the option to Approve, Request Changes, or Deny it. Requests to join the organization only have the option to Approve or Deny it.

Join an organization

Please follow the steps below to join an organization:

- Select "Join an organization".



- Choose the organization.
- Enter the organization join code if applicable.
- Choose “Send Join Organization Request”.



Create an organization

Please follow the steps below to create an organization:

- Select “Create an organization”.
- Choose if you are creating a RI or Subcontractor Organization.
- If you are creating a RI Organization:
 - Enter the organization name.
 - Enter the user join code.
 - Enter a subcontractor pairing code which will be used by a subcontractor to become associated with this RI organization.
 - Select whether or not you want to join the organization upon creation.
 - Choose “Create Organization”.
- If you are creating a Subcontractor Organization:
 - Enter the organization name.
 - Enter the user join code.
 - Select whether or not you want to join the organization upon creation.
 - If you would like to pair with an RI organization, choose the organization and enter the pairing code. If a RI and Subcontractor organization need paired after they are both created, they can be by going to the Associations section under the Subcontractor organization.
 - Choose “Create Organization”.

View/Edit an Organization

To view/edit an organization, click on the name of the organization from the organizations list.

Edit an organization’s name and codes

Please follow the steps below to edit an organization’s name, user join code, and subcontractor pairing code.

- Under the organization, select the pencil icon.
- Edit the name, user join code, and/or subcontractor pairing code.
- When finished, choose “Update Organization”.

Activity

Under the organization, select “Activity” to view the approved activity trackers for the organization.

Analytics

Under the organization, select “Analytics” to view the analytics for the organization.

Associations

Under the organization, select “Associations” to view the associated subcontractors. Click on the subcontractor’s name to view more information.

When viewing a Subcontractor organization, there is an option to pair the organization with an RI organization.

Users

Under the organization, select “Users” to view and manage users, view invitation information to share, and add an already registered user to the organization.

To manage a user, please follow the steps below:

- Select “Manage” next to the user’s name.
 - Choose whether or not they are an RI Admin, RI User, or both.
 - Select “Save Changes”.
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Goals

Under the organization, select “Goals” to view, add, modify, and delete goals.

Please follow the steps below to create an organization goal:

- Select “Goals”.
- Choose “Set a goal”.
- Select the activity type.
- Enter a name for the goal.
- Enter the start date and end date for the goal.
- Enter the target value for the goal.
- Select whether or not sub-organizations’ activity counts toward the goal.
- Select whether or not to show the goal as a percentage.
- Choose “Create Goal”.

To modify a goal; select “Modify” next to the goal, make the changes, and then choose “Update Goal”. If you would like to delete the goal, choose “Delete Goal”.

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