



# Getting Started Guide for Administrators

Reachways Community Manager

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Congratulations! You are getting ready to use Reachways Community Manager to keep all your contact information in one place.

## GETTING STARTED OVERVIEW

This Getting Started guide provides all the information the administrator needs to configure Reachways.

There are three steps to configuring Reachways:

- |               |               |
|---------------|---------------|
| <b>STEP 1</b> | Organization  |
| <b>STEP 2</b> | Users         |
| <b>STEP 3</b> | Custom Fields |

Once you have completed these steps, Reachways Community Manager will be ready to use. In order to complete these steps you will need to login<sup>1</sup> to Reachways using the Administrator username and password, provided to you. You will also need to enter your Organization ID.

Before you get started with your administrative functions, please **CHANGE YOUR ADMINISTRATOR PASSWORD**. To do this, login into your database with the user id and password provided to you by Reachways. Once in, the left sidebar has a link called **Password**. Select that link and type in your old password and your new one. Your new password must be at least 6 characters in length. When you save this page, your new password will become active.

The main section for you, as the administrator, is the tab called **Admin**. This section is available only to administrators. You will use this section to customize your database the way you want it, to set up your users, and to send messages to your users.

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<sup>1</sup> To login to Reachways, go to [www.reachways.net](http://www.reachways.net) using your browser. Internet Explorer, v. 6 or later is recommended

# STEP 1

## SETTING ORGANIZATION DEFAULTS

Your Organization settings affect the look and feel of the whole system. These preferences help personalize the Reachways Community Manager.

- Select the link called **Organization** from the left sidebar of the **Admin** screen.
- Set the “Client Name”: the name that will appear across the top of the screen.
- Select the date format: US Standard (mm/dd/yyyy) or International (dd/mm/yyyy).
- Choose a default State/Province: If you use the same state/province in most of the addresses, set it to that particular state/province. Otherwise, leave it blank and the user will select it when entering their data.
- Choose a default Country: If you use the same Country in most of the addresses, set it to that particular country. Otherwise, leave blank and the user will select it when entering their data.
- (OPTIONAL) Select a logo to appear in the top left corner of the screen: select the radio button for “Image (gif)” and click the UPDATE button. Browse your computer and find the logo to upload. Selected your logo image and click the DONE button. You must click the SAVE button on this screen to save the logo changes.
- (OPTIONAL) Change the font attributes of the banner, such as font size and font color: select the **UPDATE** (for the banner section). Change the text properties as desired and **SAVE** the changes.  
[Note: you must “Refresh” your browser in order to see the changes.]
- Click **SAVE**.

# STEP 2

## ADDING USERS

As the administrator, you already have complete access to Reachways Community Manager. Since Reachways allows sharing of information by many individuals, you are able to create additional users you may also access the system. The administrator has complete control over their access privileges. You control everyone's access to specific functions and whether or not they can view, edit or delete certain types of information.

### CREATING ACCESS RIGHT PROFILES

- Select the link called **Access Rights** on the left sidebar of your **Admin** screen.
- To edit an existing profile, click the EDIT icon by the profile name.
- Edit the name and description, as required.
- Review the existing setting and adjust as required.
- Click **SAVE** when done.
  
- To add new profiles. Click **ADD**.
- Enter a profile name and description.
- Select the desired level of access for each of the functions.
- Click **SAVE** when done.

#### **What are Access Rights?**

Access Rights Profiles control the main security features within Reachways. Administrators can define sets access rights for the different levels of users to have. Once the administrator has established profiles with different levels of access, they can be assigned to the Reachways users.

**HINT:** You may want different profiles for staff and volunteers. Also, if you are using the financial module, you may have different profiles that restrict or permit access to financial information.

**REMEMBER:** The administrator must have the *AdministratorGroup* access right profile, which is a standard profile generated by Reachways Community Manager.

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## ADDING USERS

- Select the **User Table** link on the left sidebar of your **Admin** screen.
- To add a user, click **ADD**.
- In the Search box enter all or part of the user's name.

**Remember:** every user must have an "individual" record in your database. If you do not find the individual when you do your search, you will need to add the individual record by clicking on the **New Family** button.

- Once you have found (or added) the correct individual, select the appropriate radio button and click **SELECT**.
- Enter a username and a password for the user.
- If this user is also going to be a Task Performer, select the checkbox for Task Performer.
- Choose the proper Access Right Profile for this user.
- Save this user. Repeat for every user.

**Remember:** The administrator must provide each user with their username and password to access Reachways Community Manager. Reachways does not automatically notify the user.

# STEP 3

## DEFINING CUSTOM FIELDS

Reachways Community Manager lets you customize what information that stored with Custom Fields, Choice Lists, Codes and Task List. Each one of these helps you refine what information is stored and how it will be retrieved later.

**Custom Fields:** In addition to the standard contact information like names, addresses and contact numbers, you can use custom fields to store additional pieces of information. There is a separate set of custom fields for Individuals, Families and Organizations, the three types of information stored in Reachways.

**Choice Lists:** Much of the stored information in Reachways is “free form”, which allows you to store any kind of data. For example, street addresses can be entered as any kind of text. Other fields are restricted to pre-defined values, which only let you pick from the list of choices – picking a STATE or PROVINCE for example. Using Choice Lists, Reachways lets the administrator define each of these lists, as well as the order or the choices and default choice, if any.

**Codes:** These are one of the most powerful features of Reachways Community Manager. Any person or group (family or organization) can be ‘tagged’ with one or more codes. These codes are used to categorize and search for records. As with Custom fields, there are three distinct types of codes: Individual, Family and Organization. Each set of codes is arranged in a ‘tree’ of categories that logically group the codes. For example: you may have a ‘category’ of individual codes called “EMPLOYMENT” with codes like Full-Time, Part-Time, Self-Employed, Retired, etc. Because of this, it is extremely important that you consider the best way for your codes to be arranged. Because Reachways CM is so flexible in the code structures, you may find there are now better ways to arrange your codes. So, you may wish to re-arrange the codes into different structures. There are no limits to the number of categories or codes Reachways can handle.

**Tasks Lists:** Reachways uses tasks to define and capture standard activities. For example, this may be a follow-up procedure for new visitors or anything else you choose to define. Tasks are tracked against individual people or groups in Reachways, and can be assigned to specific users in Reachways for them to take action (and close the task). Reachways, lets the administrator establish standard due date intervals and other elements of each task.

Remember: you can always modify your custom fields. However, Reachways will prevent you from deleting any specific custom field or code which is still in use by any record(s).

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## SETTING UP CUSTOM FIELDS

- Select the Custom Fields link in the left sidebar on the Admin screen.
- Custom fields can be set up for individual records, family records, or organization records.
- Select the custom field to change from the correct category: individual, family or organization fields.
- Edit the field name, description, validation rule (what type of information you are looking for – such as a date, number or text), minimum and maximum length (for text fields only), whether this field is required for every entry, whether it is searchable (to be used later for finding records for printing, etc.) and finally some help text to let users know how the field in to be used.
- Click Save once all the information is provided for a field.
- Repeat these steps for each of Custom Field to be defined.

Note: Most custom fields can actually be set up as codes in a code tree. Thus, Custom fields should be used sparingly and should ONLY be used whenever the data will be different for EACH record in the system. So, you might want to set up an individual custom field for social security numbers, since they would be different for each person. But, you would not want to set up a custom field for an individual's ethnicity, since they are not different for each person. You could set up ethnicity codes and then assign the codes to the individual records. Think carefully before setting up custom fields, since you can do a lot more with code tables than customized fields (such as creating lists and sending emails based on lists, etc).

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## SETTING UP CHOICE LISTS

Choice lists eliminate data entry errors (e.g. typos) by limiting the user to picking from pre-defined set of options. Reachways uses choice lists for many of the standard entry fields, such as address types, salutations and date types. There are different choice lists for Individuals, Families, Organizations and also a Miscellaneous set. The administrator can adjust these choice lists as desired.

- Select the **Choice Lists** link in the left sidebar under the **Admin tab**.
- Select the **EDIT** button for any of the Choice lists.
- From the list of options for the choice list, you can select and edit any of the list items (and save it)

- From the list of items, you can set the display order and select a default item. The default item will be automatically selected unless the user changes it.
- Save the list once all your changes have been made. Or cancel to return without saving the changes.

Remember: You may remove any choices from lists that are not needed, as long as they are not in use. Reachways will prevent the active choices from being deleted.

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## SETTING UP CODES

Codes are one of the most powerful features of Reachways Community Manager. Codes let you tag any of your people, families and organizations with different 'attributes'. These attributes can be represent anything.

The codes are set up in three separate 'trees': individual, family and organization. Within each tree, the administrator can define an unlimited set of categories and within each category an unlimited list of codes.

- Select the **Choice Lists** link in the left sidebar under the **Admin** tab.
- Select the Individual, Family or Organization code list and click **EDIT**
- From the existing code tree, you can expand any category, by clicking the "+" (plus sign) to the left of each category.  
Clicking the "-" (minus sign) will collapse any expanded category.
- To add a new category of codes, select the Code Table or the existing category to place the new category under and click **ADD**.  
Note: it is possible to have sub-categories within a category.
- Enter the description of the category, specify if it is unlisted. And click **SAVE**.

Note: Unlisted codes provide an additional level of security. Users access privileges will determine if unlisted codes are visible or not. (See ADDING USERS for information about setting access priveleges.)

- To add a new code, select the category it will fit in the tree and click **ADD**.  
Note: categories must be created before adding codes.
- Enter the description of the category, specify if it is unlisted.  
Note: for individual codes only, specify if it is in context of a family or an organization.  
Click **SAVE**.

- To change to order of codes or categories or the order of codes within a category, select the container of the codes (the next higher category in the tree) and click **REORDER**.
- Sort alphabetically or set an arbitrary order, and click **REORDER** to save.
- To move a code or category, select that code or category and click **MOVE**.
- Click **SELECT** and click on the desired location for the code (or category of codes) you are move. Click **SAVE** to finalize the move.

Remember: you can add new categories and codes at any time. You can also move and reorder the codes and categories at will. Reachways will also let you remove any codes or categories, as long as they are not in use by any records at that time.

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## SETTING UP TASK DEFINITIONS

The system allows user to set up and keep track of tasks to be performed or already performed. The administrator needs to define each task type and define how the task will work.

- Select the link called **Task Definitions** on the left sidebar of your **Admin** screen.
- To add a new task type, select the **ADD** button.
- Enter the type of record that will use your task type (Where used). This can be family records, organization records, or both types of records.
- Enter the “Event type”: whatever you assign it to be. For example: Phone call, Meeting, or even Action Taken.
- Enter a description of the task type in the Description field, if desired.
- Select the date rules:
  - “Open date only” means when the user enters a task of this type, the system will not assign it a follow-up date or a closed date. The user will need to enter those if desired.
  - “Opened with Auto Follow-up Date” means when the user enters a task with this rule; the system will automatically generate the follow-up date and enter it for the user. The follow-up date will be based on the number of days you set up in the next field called “Default follow-up days”.
  - “Opened with Immediate Completion” means when the user opens a task with this rule; the system will automatically close it immediately after it is opened. This rule is good to use for task types of “Action Taken” since the action has

already been accomplished and there is nothing more for the task performer to do.

- Click **SAVE** to store the task definition.
- Repeat for each required task type.

Remember: new task types can be added at any time. Once a task type is saved it can be assigned to people in Reachways. If desired, each task can also be assigned to a Reachways user to be completed. Reachways can notify users of these tasks.

**READY  
TO GO**

## START USING REACHWAYS

Once you have completed the steps described above, your Reachways Community Manager is ready to go.

You can begin to enter and share your contact families, organizations and individuals.

## BEYOND GETTING STARTED

For help with Reachways Reports, please consult the *Reporting Guide*.

For help getting started with the financial module, please consult the *Financial Administrator's Module*.

For help with Reachways Surveys, please consult the *Survey Administrator's Guide*.