

# Administrator

## PHASE 1

Hello and welcome to your step by step guide to getting started with iKnow Charity.

To help you get started and find your way around the programme, we've provided this guide.

Designed to work in tandem with our support tutorials and videos, just follow the links beside each area to be taken to the relevant guides. We offer completely free, unlimited help and support. If you get stuck and you can't find what you're looking for on our support site, don't panic. You can get in touch with us and our amazing support team will be happy to help you out.

Now that you've completed this stage, you should have a good idea of how iKnow works. Of course, there's always more to learn and more to do. At this point, feel free to explore the system as you need and really get it working for your Organisation. Alternatively, we have a Phase 2 guide to take you further. Before progressing to this, we'd recommend that you have all of your Charities contact's data added to the system. You're able to do this through a data import to save time if you wish.

To download the Phase 2 stage, click <https://support.iknowcharity.co.uk/i-am-a/administrator>

### EXPLORE THE DASHBOARD

<https://support.iknowcharity.co.uk/dashboard/dashboard>

- Change the layout of your Dashboard using the Dash Settings.
- Click on 'Me', upload a picture of yourself.
- Ensure that your details are correct and change your password to something personal and memorable.
- Head into 'Settings' from the Dashboard and open the 'Dictionary'. Change the Vocabulary under the Global Dictionary. Make sure that this matches your organisation's language so as to avoid any confusion for other leaders when they start using iKnow Charity too.

### PEOPLE

<https://support.iknowcharity.co.uk/modules/people/>

- Add five single people within the People Module with mixed journey items.
- Add a Family, Two Parents and 2 Children in the same Address.
- Add another person and use a different email address which you have access to. This will be helpful for when you're exploring Admin Groups as well as other areas within the programme.

### GROUPS

<https://support.iknowcharity.co.uk/modules/groups/>

- From the Dashboard, select 'Groups'. Create an event within the groups calendar which reflects your small group's meeting arrangement. Set the start date a week in the past so that later on you can do the next step.
- Record attendance for your group for the previous meeting.

### TEAMS

<https://support.iknowcharity.co.uk/modules/teams/>

- From the Dashboard, Select 'Teams' from the tool-bar or drop down menu. Select your team from the options. If you can't see it on the list, you may need to speak to the Administrator.
- Initiate a Conversation within iShare, upload a document to your Conversation.
- Create a Rota for one of your events, Add Roles to the Rota. Add yourself onto the rota, once more people have been added to your team, you'll be able to add them to the Rota too. Test out the Holiday and Clash Warning system by adding yourself to multiple roles and booking yourself some time away within 'Me' (From the Dashboard).

### FINDER

- Create a search for all of your regular contacts which fit into the age category of 18-55. Save this as a Global Search.
- Create a Search for all of your contacts who have completed a Journey Landmark. Save this as a Private Search. Note the difference between Global and Private Searches.