
To configure interMediate, use its host computer to log on as its Administrator, then click the Start button.

Default user name: Administrator (not case sensitive). Password: administration (case sensitive).

For networked multi-user systems, no other users can log on whilst the Administrator is logged on.

After changing either Set Up or Preferences information, re-start interMediate on the host computer. For the details of each screen in the System Administration area, click the Help button.

Set Up Click the *Set Up* icon.

The Set Up screen contains graphics and other information essential for interMediate to work correctly. For details of how to install graphics and other to set up information, click the Help button.

For UK services funded by the Legal Services Commission, please refer to the LSC guide *Guidance_for_Completing_Mediation_Submissions_Ver1.0_Oct07.pdf*.

Preferences Click the *Preferences* icon.

The Preferences screen contains information that customises how interMediate works, under six different headings: Letters, Text Options, Access, Automatic Events, Standard Costs and Charges and Miscellaneous, including setting the next invoice number. For the details of each subject, click the Help button.

Templates Click the *Templates* icon.

Use the buttons to create letter templates. The database compiles an index of templates as you add them. The text can be copied and pasted from other systems. Remember to mark each letter template for use with:

- cases letters to anyone in connection with particular cases, including to agencies and mediators,
- agencies letters to agencies, unconnected with a particular case,
- mediators letters to mediators, unconnected with a particular case.

Users Click the *Users* icon.

Enter a new user's name in *New User Account Name*, or by selecting a mediator. Then click a button to add the person as a Manager, User or Mediator. A message appears with a default password. Give each new user their user name (for mediators, a number) and default password. As a new user logs on, interMediate asks for a private password, replacing the default password. **PASSWORDS MUST CONTAIN AT LEAST 8 CHARACTERS.**

Use *Edit This User* and *Change Password* to change the administrator password to a private password.

To increase the number of licensed users, contact Resolute Systems for a licence update. (01494 520088).

Housekeeping Click the *Housekeeping* icon.

There are seven housekeeping functions, accessible only to the Administrator using the host computer.

- Back Up** To make a back up copy of interMediate, click the *Back Up* button. The copy is placed in the folder: interMediate Folder / interMediate Back Up, with the file name *interMediate Back Up*. Change the name to include the date and store the back up copy safely. Only the interMediate Back Up folder should be included in any scheduled back ups of the host.
- Restore records** For restoring case or enquiry records that have been completed or discontinued.
- Delete cases** For deleting cases that should not appear in reports of past activity.
- Delete invoices** For deleting invoices, provided any related case has been deleted first.
- Updating** interMediate updaters arrive as files to be decompressed and placed in the interMediate folder. The update runs automatically, incorporating new functions into interMediate. For more detailed information, see the separate Updating Guide.
- Set case number** To set the next case number for continuity with previous systems.
- Delete mediator or agency** For deleting mediators or agencies that should not appear in reports of past activity.

Resolute Systems

Resolute Systems (UK) Limited 9 Marlow Road High Wycombe HP11 1TA United Kingdom

Telephone: 01494 520088

Company registration: 3826934

Email: sales@resolutesystems.co.uk

VAT registration: 776 3622 04

Networking

interMediate can be networked for up to ten users by FileMaker Pro, or for many more by FileMaker Server. interMediate must always be started first on its host system. Network clients then use their own copies of FileMaker Pro and interMediate Net Client. Any number of users can be registered in interMediate, with individual passwords. The number of concurrent users is determined by the interMediate licence.

Networks must operate in full duplex mode. Any half duplex hubs should be replaced by full duplex switches. The network speed should be at least 100 Mbits per second, with category 5, 5e or higher standard cables. Wireless networking is not recommended for interMediate because it is less secure than wired.

It is ESSENTIAL that the interMediate Folder on the host can not be shared across the network by file sharing. If users can open interMediate via OS level file sharing, rather than via FileMaker networking, multi-user record locking will be compromised and interMediate may be corrupted.

Getting Started

Case records refer to mediators, letter templates, agency records and lists in menus. These can be entered whilst working on cases as the need arises, but it's much better to have them available to users to include in case records at the outset.

To enter letter templates, log on as the Administrator, click the *Templates* icon, then click Add Template to create a new letter template. The text of the templates can be copied and pasted from other files. Remember to select how each template is to be used in the bottom right corner of the letter text panel. To include data from the case record in a case letter template, click the *Codes* button. This shows a simple set of codes that can be entered into case letters. The codes are replaced with data from the case record when the letter is printed or sent. This automatically customises templates to the case as they are used.

To enter agency and mediator records, log on as a user and click the Mediators or Agencies icon, then click the *Add Agency* or *Add Mediator* button. Complete the record as far as the available information allows. Case names usually contain the names of the parties and should be treated as confidential information. For that reason, in Agency records click the checkbox to include case names in reports only for appropriate agencies, like the police, a court or a legal practice.

Lists in most pop-up menus can be edited directly in the menu by choosing the Edit... option at the end of the menu. The most commonly used menus appear on the Case Summary, Parties and Events screens.

Windows PCs can dial phone numbers from interMediate data using the Windows Dialer. If the user dials a prefix to get an outside line, the prefix can be entered in the interMediate Preferences screen. Once the Dialer is set up and working, click Use Windows Dialer in interMediate Preferences.

Security

interMediate protects its data by locking itself to its host hardware. If the database is moved from the computer on which it's first installed it won't open. Resolute Systems can provide a code to release the lock.

On-line Help and User Guide

Most screens include a Help button that displays appropriate help topics for the screen in use. The Help system is the most immediate source of information for users, presenting what's needed at the right time and in the right place. To print the help pages as a manual with a cover and contents page, click the Manual button on the Start Up screen.

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