These notes are a guide to starting work in interMediate. They assume that interMediate has already been installed, with any network client installations that may be used.

There is detailed information about installation in the PDF files interMediate Windows Installation and interMediate OS X Installation, and about system administration in the PDF file interMediate Admin Guide. The file interMediate Checklist may also be a useful reference.

If possible, it's a good idea to plan at least two hours for this first session, following the guidelines below. Once the stages shown below have been completed, interMediate will be ready to start entering cases.

about accounts and passwords

To start interMediate, click the interMediate icon on the desktop of the interMediate host computer. Log on as the Administrator using the default password:

user name: Administrator   password: administration (case sensitive).

The Administrator account is for system administration and can be used only on the interMediate host computer. The administration password expires every 60 days, after which the system prompts the Administrator to change it at any subsequent log in. The default administration password is always restored after a system update.

Personal passwords are system generated and users are prompted to change them to private passwords at the first login. Personal passwords expire every 30 days and the user is prompted to change them.

following installation

Log on as the Administrator.

Go to Set Up and check the Set Up data, including importing letter graphics if necessary.

Go to Preferences to check and complete the settings.

Go to Housekeeping to enter the first case number to use. This is usually the next number after your current latest case number. interMediate case numbers run in a single sequence and don't restart at 1 at the beginning of each year. There's no need for this because interMediate makes case dates obvious in other ways.

Go to Templates to enter or check letter templates. Remember to use letter codes in templates in places where the database should enter information from the case record. To see the available letter codes, click the Codes button.

Go to Users to enter User accounts. Accounts may be entered with different privileges:

Managers: access to everything except system administration functions.

Users: as for Managers, but limited in ways that are selected on the Preferences screen. The limitations are designed mainly to prevent novice users from deleting essential information.

Mediators: as for Users, but limited to only their currently allocated cases and with no access to the Reports system and Mediator Training and performance Review records.

Host: for hosting interMediate on FileMaker Pro running with no local user. interMediate runs with no access to data on the host system for unattended hosting or in a data centre where the records should not be visible to staff. There is a checkbox on the Users screen to enable the Host account.

about multi user systems

interMediate must always be started on its host computer before any network clients can use it.

To open interMediate as a client, use only the interMediateNetClient software running on FileMaker Pro.

The Administrator account is for use only on the host. No other users can use interMediate whilst the administrator is logged on.

menu entries

interMediate contains many pop-up menus for entering data in a way that is fast, consistent between records and not error prone. Most of these menus can be edited individually as they're used, but when setting up interMediate for the first time it's a better idea to edit them as a group.

To do this, on the Preferences page in the System Administration area, click the button Open Menus. A list of menus appears. Most of these menus will change only infrequently, but some of them should be edited before entering cases. The most important of these are:

Disputes	What disputes are about.
DisputeStatus	Types of dispute (ie: community, restorative justice, family, workplace, etc).
Districts	A UK local government district or any geographical area smaller than a US state.
EventTypes	What the events in cases may be (ie: phone call, letter, interview, meeting, agreement, etc).
Locations	Usually where meetings take place.
Process	Different approaches to disputes (ie: mediation, community conference, facilitation, etc).
Sources	Categories of people originating cases (ie: different types of courts, other pubic bodies, etc).

Not all the menus are used in all editions of interMediate.

to start work

Log on with Manager access privileges.

Click the Mediators icon to enter and check the Mediator records.

Click the Agencies icon to enter and check the Agency and Agency staff records. Take particular care to click the Referrer checkbox for every Agency that may refer cases.

Click the Cases icon to Add Equiries. Cases refer to Mediator and Agency records, so the most often used of these should be present before entering Enquiries and Cases. To change an Enquiry to a Case or to close an Enquiry/Case, use the Change button on the Status panel of the Case Summary screen.

Remember, Notes (on the Case Summary screen) are for supporting information about the case. To record events in the Case, use the Events screen.

resetting interMediate

If fictional records are used to learn interMediate, they can be deleted by re-setting the database. To do this, log on as Administrator and go to the Housekeeping screen. Click the Delete button for Past Cases whilst holding down both the Shift and Alt keys on the keyboard. interMediate asks which records should be deleted. So, for example, Case records can be deleted whilst keeping Mediators, Agencies and Letters.

if you get stuck

A few simple things will solve most problems whilst learning interMediate.

If in doubt, click something red. Every red button or piece of red italic text does something useful. You can't do any damage by clicking something red or red italic text.

There's a Help button in the grey bar across the top of most screens. It delivers the Help topics applicable to the Functions of the screen in use at the time, with a Methods section describing how the controls work.

The Help pages can be printed as an indexed manual. To do this, click the Manual button on the Start screen.

If none these work for you, don't struggle. Just call Resolute Systems at the time on 01494 520088 (or international: [44] 1494 520088) or Skype: resysuk. Skype is free of charge for Skype account holders.

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