Welcome to your Quick Tour!

- Goal: To see how easy it is to add a new user and create a new team role!

- Objective: In 5 minutes or less add a second user to strake/IR.

- Plan:

  Step 1: Log in – less than 1 minute

  Step 2: Create a new human resource – 1 minute

  Step 3: Invite that person to be a user – 1 minute

  Step 4: Create a new role for that user – 1 minute

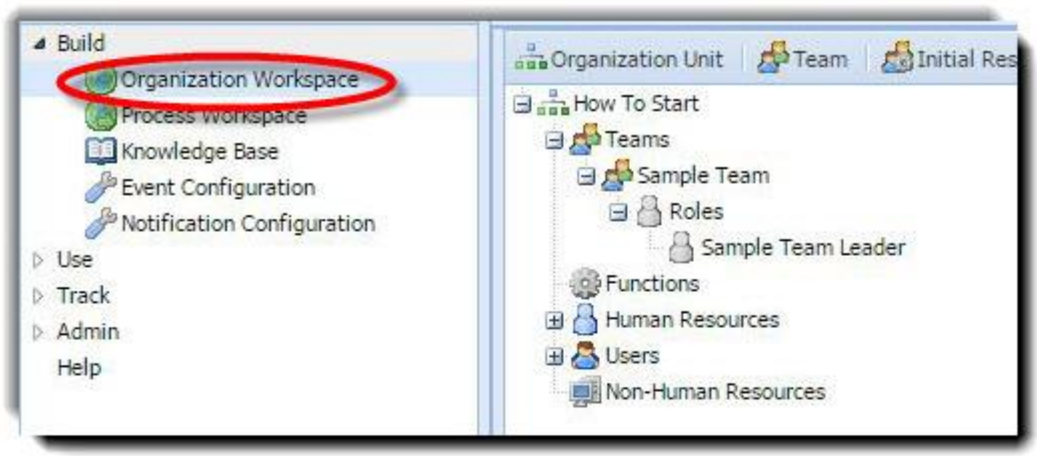
  Step 5: Upgrade to add another user – 1 minute

- Note: Our Support section has detailed videos and articles on every feature of our product. The quick tour is to get your feet wet before the big dive! And in case you need it, we provide swimming lesson for every level, beginner to advanced!

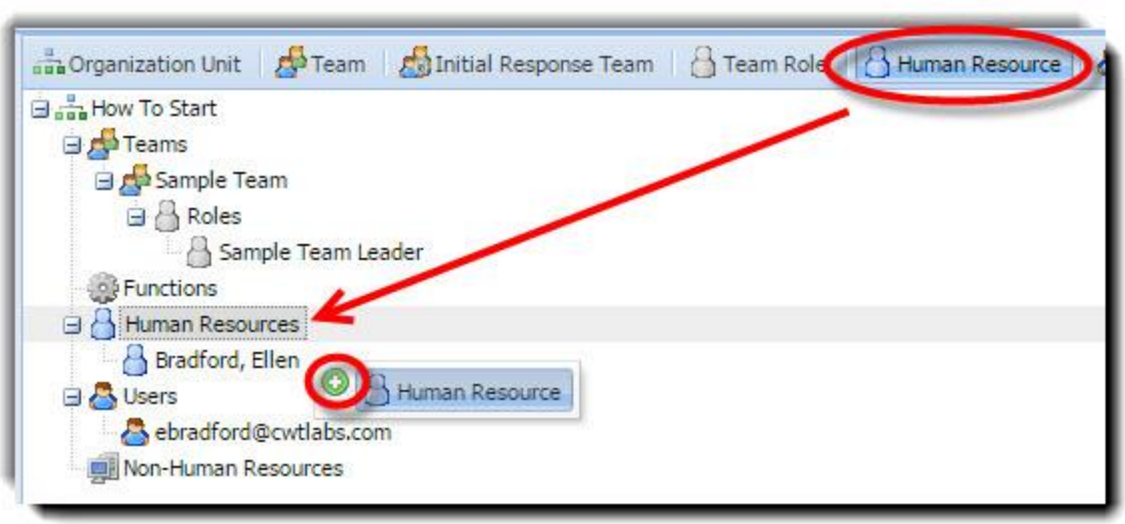
Step 1: Log in! Return to your activation email if you have not created your password and log in directly from that link.

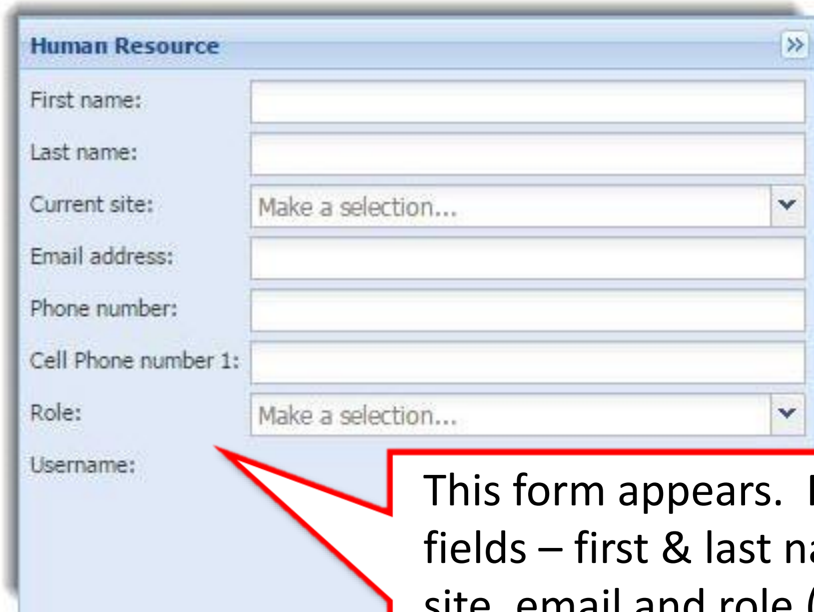
If your account is created, login here

Step 2: Expand the Build Menu and click Organization Workspace!

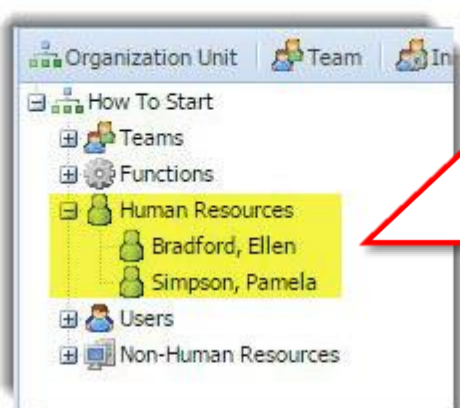


Click and drag the Human Resource icon to the Human Resource 'bucket' and when the '+' appears, release.





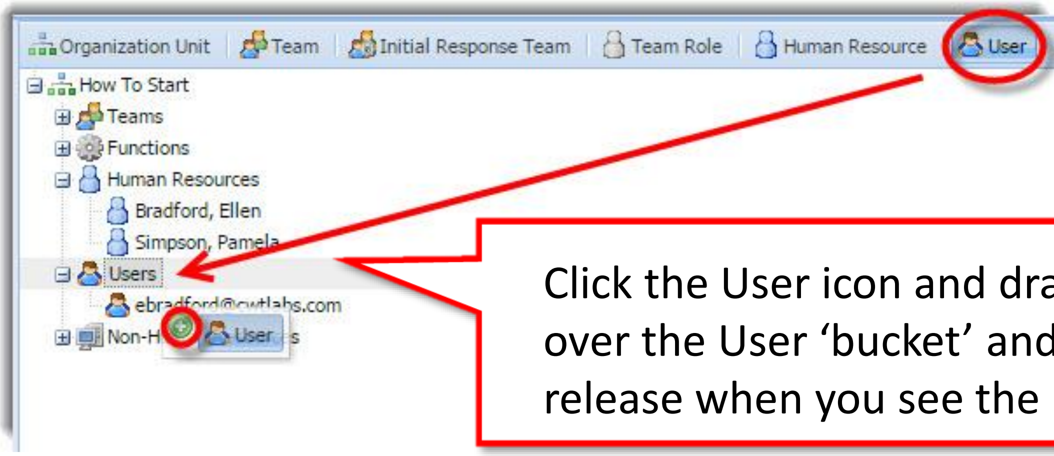
This form appears. Fill in required fields – first & last name, current site, email and role (business admin = user who can add other users, user = non-admin capabilities). Click Save.



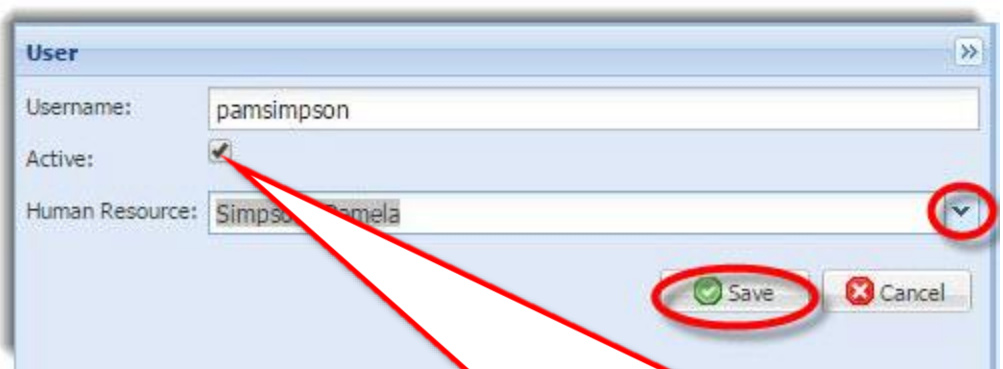
Your new HR appears in the Human Resource 'bucket'

Note: Click the '+' next to any bucket in order to expand it

Step 3: Invite the new human resource to be a USER of strake/IR.

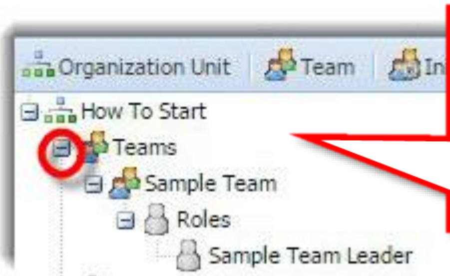


Click the User icon and drag it over the User 'bucket' and release when you see the '+'.

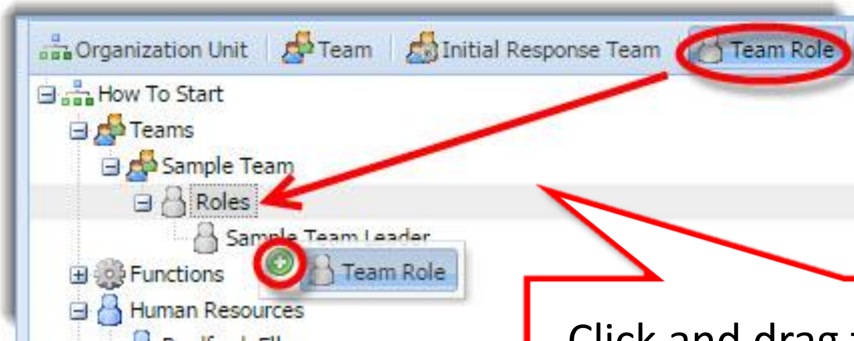


Create a username, check the 'active' button and select the user's name from available human resources in drop down, then Save.

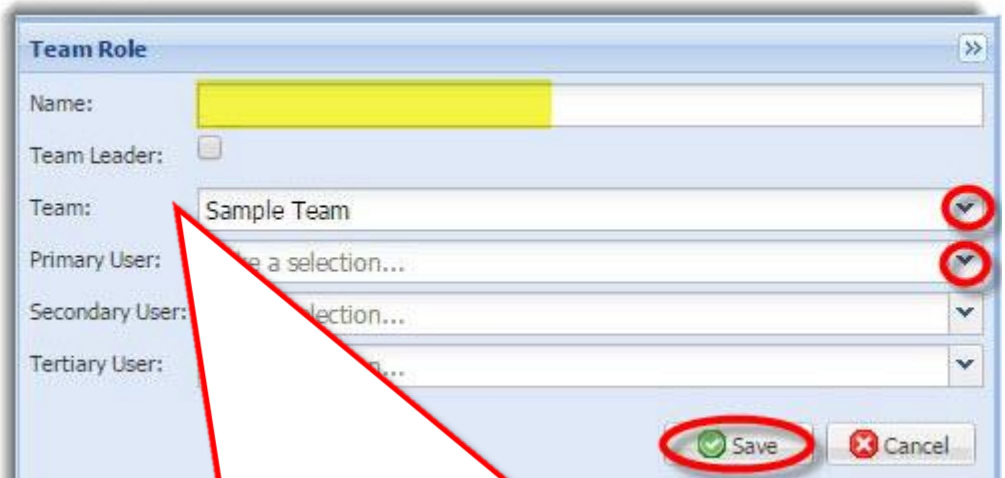
Step 4: Add a new role to the sample team and assign the user.



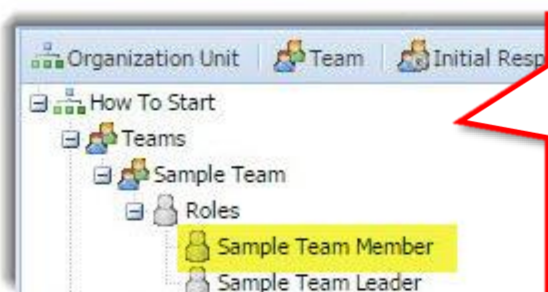
Click on the '+' next to the Team 'bucket' to expand it. View your sample team



Click and drag the Team Role icon to the Roles ‘bucket’ and release.



This form will appear. Name the role, select the team and user from the drop down menus. Click Save.



Your new team member will appear under the Role ‘bucket’

Step 5: – If you'd like to add more users beyond your subscription level, follow these quick instructions to upgrade.

In the Admin menu, select Account Configuration, then select your new plan from the drop down and Save. An order form will appear to process your order.

Billing confirmation will appear in the Billing Information menu item.

For more information on building your organization, click here for a video and here for the Help Article.