

REPORTS TRAINING

infoodle
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**GENERATING REPORTS
TRAINERS MANUAL**

**1
LEVEL**

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LEVEL 1

infoodle reports training

Trainer Notes

Before the training session starts make sure that each attender (trainee) has been set a role that allows them access to reports (done by the Infoodle administrator) and has a login.

Think about how you will conduct the training session:

- Where will you carry out the training session?
- Will you demonstrate using a projector/overhead screen?
- Will each student work from their own laptop or sit at a desktop computer?
- Does everyone have access to the internet/WiFi?
- Will you need a microphone?
- How many people do you think you can train at one time?
- Make sure you have enough trainee hand-outs printed.
- What do you want them to learn?
- Ensure each person has been given permission in their Role to do what you want to train them on. (This will be set by the Infoodle administrator).

This manual covers the following topics:

- **Create reports**
 - Select different Criteria
 - Select by one per row
 - Group together per household
 - Select customised fields
 - Generate reports
- **View & Export reports**
 - Send to spreadsheets
 - Send to contact pages
 - Add to an existing group
 - Print lists
 - Print checkin form

Why do we use Infoodle?

Infoodle is a tool that not only has cool features but is used to equip you and your organisation to do the job you are required to do. That is to care, include and encourage everyone in your community.

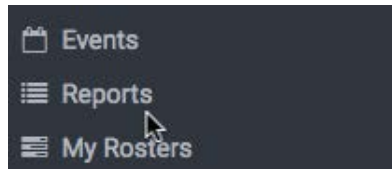
In the church setting this means, infoodle is a tool to help equip the saints to fulfil their ministry and to build up the church. Ephesians 4:12

INFOODLE REPORTS TRAINING

The reports area is very customisable so many varied reports are able to be produced.

Create Reports

To create a report first click on **Reports** in the Navigation bar.



Report areas. Depending on your package you may only have People listed here. Most of your reports will be on people. Select people to move to the next screen to select the report criteria.

Special reports. These are some pre set reports. By clicking one of these you will be taken to the next screen to produce these reports.
Training in this area is covered in groups training level 2 - attendance.

Financial reports. You can do financial reporting if you have access to the Finance Package.

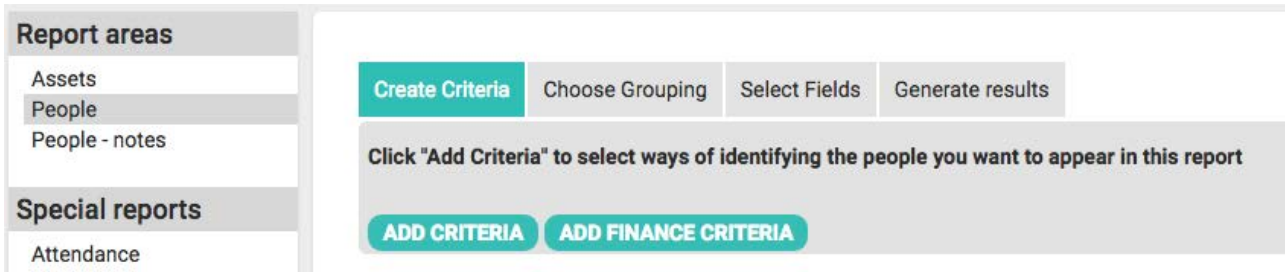
Your reports. Once you have selected a report criteria you can save that criteria. Next time you want to generate this report you can select it from this area. This will only be available to you.

Group Reports. You can save a criteria and make it available only to certain groups.

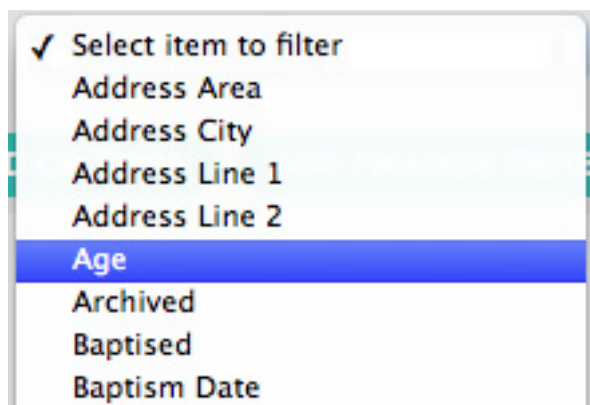
Global reports. As above, you can save report criteria, but make it available to others.

Create Criteria

Click on **add criteria** to select the filter you wish to use. This identifies the people you want to see in your reports.

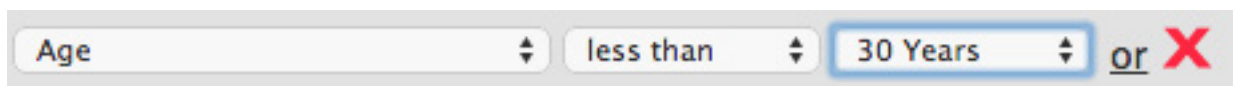


By clicking on the little up/down arrow a drop down list will appear to make your selection from.

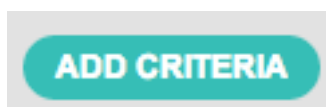


Select the item you want to filter.

Keep working along the line and choose how you want to filter.



Then click on **add criteria** again to select the next type of filter



1 infoodle reports training

For this training session we have chosen a scenario that we are wanting to start up a new young mens life group. We need to find the men aged between 19 and 29 and not already in a life group.

Click "Add Criteria" to select ways of identifying the people you want to appear in this report

Age less than 30 Years or X

and Age greater than 18 Years or X

and Group not in Lifegroups [35] or X
Permission Active members only

and Gender equals Male or X

ADD CRITERIA ADD FINANCE CRITERIA

Once you have selected all the criteria move to next tab.

Choose Grouping

Create Criteria Choose Grouping Select Fields Generate results

Choose from these choices how you want the individuals to be listed

Individual or by household

One row per person

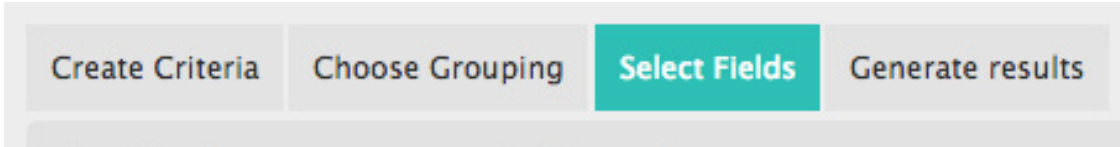
Group all people in a household together

For this scenario we want to show each individual that matches the criteria selected so we select here one row per person.

We will look later at when you will use, **Group all in a household together.**

Select Fields

The default list has standard fields ticked:
Name, Address, Phone numbers, email, Gender, Birthdate.



If you wish to select different custom fields (These have been made available through the custom fields administration area) then choose customise your list.

As per this example there are many customisations available. Simply tick what you would like.

What data do you want to see in the results

[Reset to default fields](#)

Person [Untick all](#) [Tick all](#)

<input type="checkbox"/> Combined address name	<input type="checkbox"/> Combined name	<input type="checkbox"/> Unique ID	<input type="checkbox"/> Archive
<input type="checkbox"/> House ID	<input checked="" type="checkbox"/> Firstname	<input type="checkbox"/> Middlename	<input checked="" type="checkbox"/> Lastname
<input checked="" type="checkbox"/> Title	<input type="checkbox"/> Marital Status	<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> Occupation
<input checked="" type="checkbox"/> Date of Birth	<input type="checkbox"/> Day of Birth	<input type="checkbox"/> Month of Birth	<input type="checkbox"/> Date of Death
<input type="checkbox"/> Age today	<input type="checkbox"/> Guardian	<input type="checkbox"/> Role	<input type="checkbox"/> Login activated
<input type="checkbox"/> Login Active	<input type="checkbox"/> Last online	<input type="checkbox"/> Last logged out	<input type="checkbox"/> Preferred contact method

Groups [Untick all](#) [Tick all](#)

<input type="checkbox"/> Group membership (limit to criteria)	<input type="checkbox"/> Group membership (regardless of criteria)	<input type="checkbox"/> Group function	<input type="checkbox"/> Group skill
<input type="checkbox"/> FM1 - Family Membership 1 Year	<input type="checkbox"/> DOB	<input type="checkbox"/> DOB Month	<input type="checkbox"/> DOB Day
<input type="checkbox"/> Task	<input type="checkbox"/> Volunteer	<input type="checkbox"/> Status	

Person changes [Untick all](#) [Tick all](#)

<input type="checkbox"/> Date added			
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Contact data [Untick all](#) [Tick all](#)

<input checked="" type="checkbox"/> Cell phone	<input checked="" type="checkbox"/> Personal phone	<input checked="" type="checkbox"/> Email address (preferred)	<input type="checkbox"/> Other Email addresses
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Generate Results

If you want to save this criteria for another time you can do so here. Type the name you wish to use in the Criteria name box. Then who do you want to give access to use this criteria; only yourself, a group - then enter the group name, or to everyone. Click **save**.

Create Criteria Choose Grouping Select Fields **Generate results**

Save criteria

Criteria name

Who is able to use this criteria?

Only me

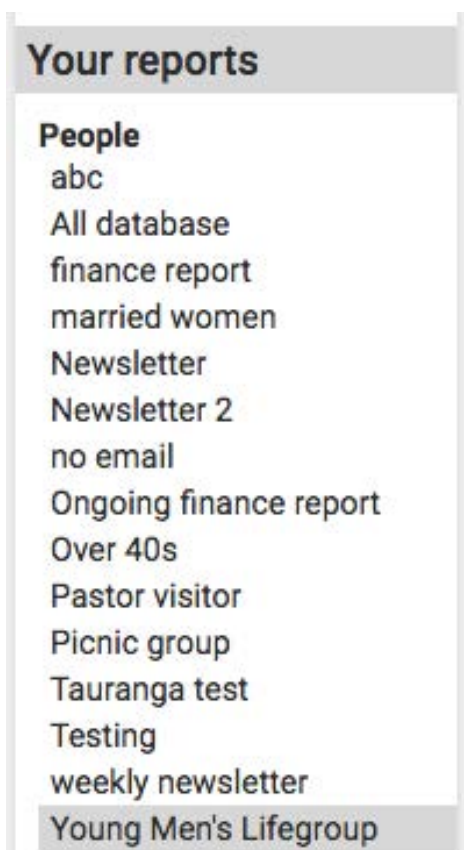
Group

Everyone

Advanced search filter

Available (*personal reports are always available*)

SAVE



The report will the appear on the left hand side under **Your Reports**.

Download Options

You can download the data as an excel spreadsheet or .CSV file by clicking Download and then view and print from there. Alternatively you can download the data into a check in form.

Download options

Excel spreadsheet file (xls)

Download

Plain text file (csv)

Download

Check in form (pdf)

Download

Print Check in form

You can print off a form that enables you to check in a group i.e. a sunday school class. Choose group as you filter then the name of the group (Sunday school class).

Then go to the Generate results tab and click on Download beside check in form (pdf).

The pdf will be downloaded onto your computer. You can then open it and print it off in the normal way.

It will look a little like this:

Sign in and Out Sheet

Date:

Group:

<p>John Banks Age: 3</p> <p>76 Alexander Ave 12 Oct 2010</p> <p>Guardian Ben Wakefield - [M]</p> <p>Seat position..... Sign in & out for John</p> <p>IN <input type="text"/> OUT <input type="text"/></p> <p>ALERTS/COMMENTS</p>	<p>Bobby Brown Age: 5</p> <p>934 Cameron Road 17 Jul 2009</p> <p>Guardian John Brown - [M] - Cell:027 345 6896 Ph: 07-5712910</p> <p>Seat position..... Sign in & out for Bobby</p> <p>IN <input type="text"/> OUT <input type="text"/></p> <p>ALERTS/COMMENTS</p>	<p>Test Tester Age: 10</p> <p>3 Happy Place 21 Oct 2013</p> <p>Taita</p> <p>Seat position..... Sign in & out for Test</p> <p>IN <input type="text"/> OUT <input type="text"/></p> <p>ALERTS/COMMENTS</p>
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Further Processing Options

Send to Contact

You can also send the list to the contact page and then send an email, text, letter or create labels. Click on **Go** next to **go to infoodle contact page to email them etc.**

Go to infoodle contact page to email them etc. **Go**

You may be asked if you want to save this criteria, if you have not already done so. If you do NOT want to save this criteria click **No**.

If you do then click **Yes** and follow the steps above under **Generate results**.

Save criteria X

Do you want to save this criteria?

You will now be on the contact page.

Email Letter Text Label

Compose a new email

Send From Send to Content Attachments Signature Send

From Get replies to this email sent back to infoodle
People can also send emails to your infoodle account at 1835

Get replies to this email sent to my email account

Inbox
Draft
Sent mail

To see how to send emails go to the **Contact Training**.

Add to an existing group

For our scenario we want to add them to an existing group. If you have not created the group you can save the criteria and then come back to it once you have created the group. Select **Add to an existing group**.

Add to an existing group

Choose group

Select the name of the group and select the permissions you are giving the members. If unsure what this means select view only for now, you can change them later. (Talk to your infoodle administrator or check the Help to get clarification on this.)

Click **save**.

You can now go to the group through the groups tab.

Group all in a household together

You may wish to send out a letter, one to each household. By NOT selecting any criteria you are selecting everyone in the data base. Then by selecting Group all people in a household together your report will list all the separate households.

Create Criteria Choose Grouping Select Fields Generate results

Choose from these choices how you want the individuals to be listed

Individual or by household

- One row per person
- Group all people in a household together
 - Always include spouse from household

List by group

- List all people, broken up by groups within a group type

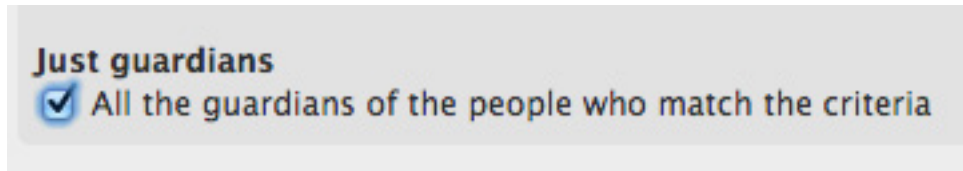
Show groups within group type All Group types

Just guardians

- All the guardians of the people who match the criteria

Just guardians

If you wanted to send a letter to the guardians (includes Parents and all who have been set as guardian) of the children's ministry, after selecting the criteria, for example: "Children's ministry" tick the **Just guardians** grouping and an email can be sent to just the children's guardians.



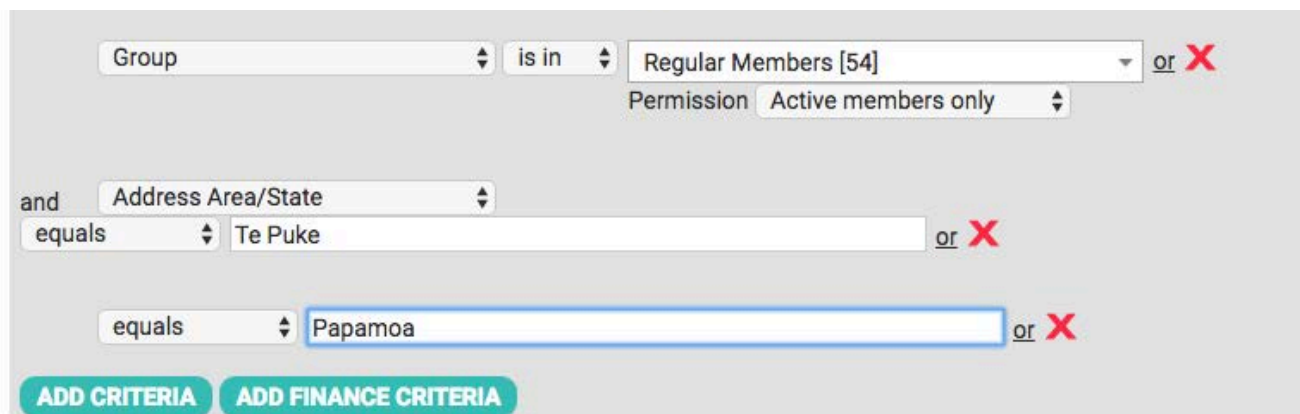
Using and & or criteria

When creating a report you can filter fields by using And & Or filters. For example, you are wanting to start a new group/work in a certain district and need to find out how many people who already regularly attend your activities live in that general area.

Start by selecting the group of regular attenders



Then add the Criteria of "Area" by clicking on the **add criteria** button
Then make your selections; Address Area - Equals - Te Puke



Then click on the or

And type in another address area. You can select as many as you like.

You can now continue to choose your grouping, select fields and generate results as above.

Congratulations you have now completed

infoodle reports training Level 1

Further training is available in the help system



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