

GROUPS TRAINING

infoodle
oodles of info



ADMINISTRATING
GROUPS
TRAINERS MANUAL

3
LEVEL

www.infoodle.com
Phone: (+64) 579 3085
Email: sales@infoodle.com

STORE

MANAGE

CONNECT

TRACK

Trainer Notes

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

If you will be covering **Group Functions, Team skills, or Group Custom fields**; ensure these have been set up in the group types and custom fields areas. See the administrators hand book for details.

Prerequisites: infoodle groups training level 1 & 2.

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?
(We reccomend each trainee can work on a computer rather than just watching.)
- 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?
- If you want them to be able to make changes (edit), ensure this has been set in their role. In other words make sure they have the permissions to do what you are wanting to teach them.

This manual covers the following topics:

- Create groups
 - When to and how to use admin only groups
 - Hibernate and expire groups
 - Tasks & Content
 - Filter data
- Advanced search
- Delete groups
- Group custom fields
- Create subgroups

INFOODLE CONTACT TRAINING

Create Groups

Add new group

As in Groups training level 1 first select **groups** in the search bar and then click on **add**.

Identification

Start filling in the boxes that identifies the group.

Name of the group

Group type

These are pre-set by your infoodle administrator and relevant to your organisation. (see your infoodle administrator or the administrator hand book for more details)

Purpose of the Group

This does not need to be filled in but can be helpful notes regarding the reason this group has been created.e.g. It could be for emailing purposes only, those who wish to receive a regular monthly email update.

Hibernation and Expiry

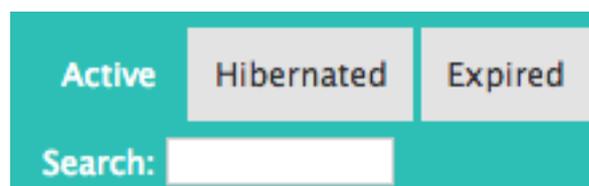
The purpose of the hibernation and expiry date is primarily for large organisations when the group list gets very long. For most organisations this is best left blank. Talk to your inFoodle administrator if you need further instructions on this. Or refer to the Administrators hand book.

To search for an expired or hibernated group

You will need to have "See all groups" permission in your role.

By clicking on Hibernated or on Expired a list of the hibernated or expired groups will appear.

If you know the name of the group you are looking for type it into the search box.



By clicking on the group name you will be taken to that group page. If you wish to make any edits to the group you will need to un-expire or un-hibernate the group first. This is done in the group edit area.

Group usage

This sets some areas of access for, or permissions on the group. e.g linking the group to see notes or be rostered. Some of these features are only available if you have the relevant modules. Further detail below.

Admin only

This has caused several people to trip up. Please make sure all the attendees fully understand the purpose of an admin only group.

Only tick this box if this is a highly sensitive group or very private group. This could be a senior leadership group and you do not want anyone except for those in the group to have access to any information that is attached to the group. e.g Sensitive meeting notes can be stored in the Library. Only the administrator of this group will be able to edit this group. e.g add members or remove members. Even if you are an inFoodle administrator (have that role) but not an administrator of this group you will not be able to edit the group.

Group Usage

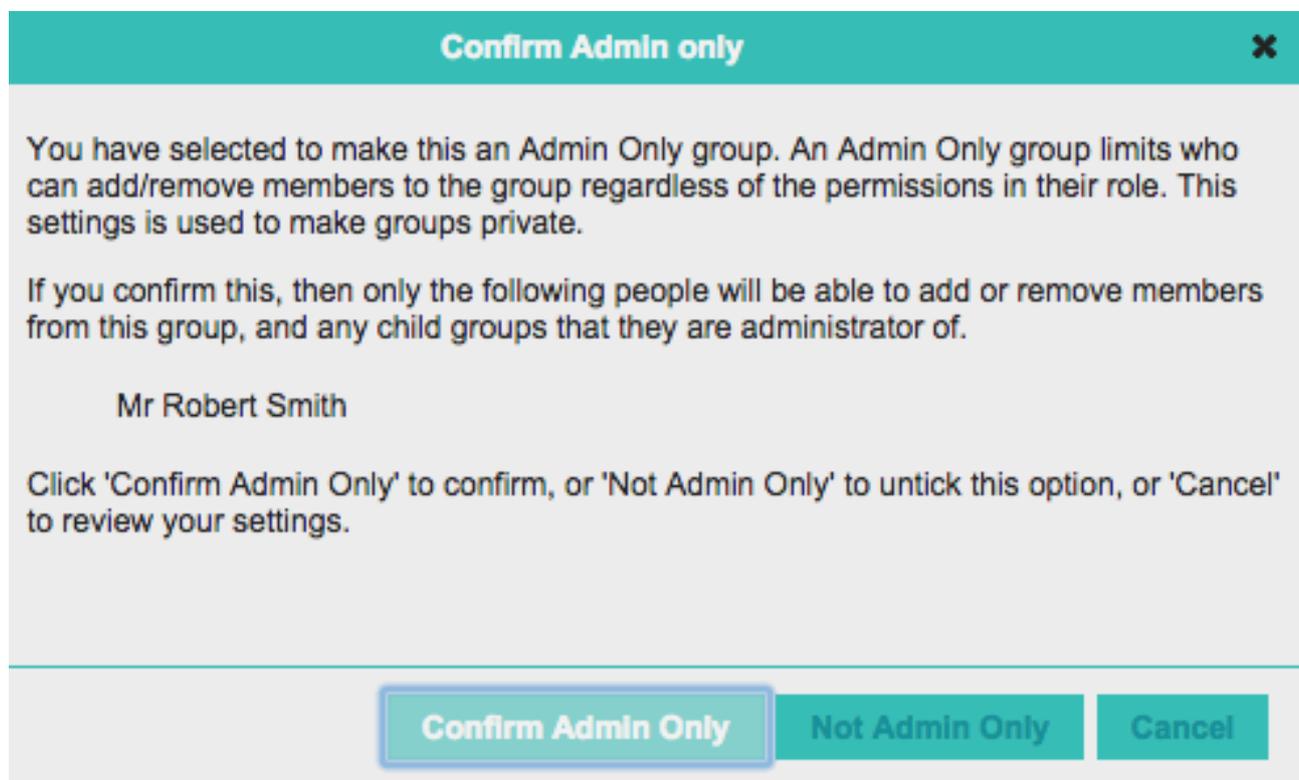
Admin only Can only be edited by administrators of this group

Tasks Can have tasks assigned

Content Can see content

If this has been ticked and there is no group administrator you will need to contact the inFoodle office to release the group.

When you later save this new group and you have ticked Admin only a popup box will appear asking for confirmation of this being an Admin only group.



The name you see in this box is the name or names of the administrators of this group.

Tasks

If you have the Rosters module and/or the Actions module.

Tick this box to allow the group to be rostered for an event or if you want a group to have actions assigned to them. Actions are reminders emailed to the group members about a task that someone in that group needs to complete.

Content

When this box is ticked the members of this group will have access to see certain content when given permission by the person who creates the note or email. e.g an email is sent to an individual but a group is given permission to see the content of that email after it has been sent on the individuals profile page.

Filter Data

This is only available if you have Groups full module.

Complete these fields to enable searches in the Advanced search.

This is particularly suited to small groups where some one may wish to attend on a certain day or certain type of group. (see group types below)

Filter data

Meeting Day: Wednesday

Meeting Time: Evening

Meeting Suburb: Bethlehem **MAINT**

Attendee Gender: Male

Attendee Age Group: Under 35 **MAINT**

Comment: Mostly social group with a short devotion,
 Seeker friendly.

Status: Open for new members **MAINT**

Meeting Frequency: Weekly **MAINT**

Groups location: 72 Hawkrigde Heights 3110

Map Location: Click "Get Map Location" to set the map location

GET MAP LOCATION

SAVE CANCEL

Enter the address of the meeting location and then click on get map location

GET MAP LOCATION

Check the address details in the search box, you can also move the red location indicator to the correct place.

You need to ensure the address and **Long/Lat**: numbers are at the bottom of the map and **save map location**.

Address: 72 Hawkrigde Heights Bethlehm
 Long/Lat: 176.11840610000002 / -37.6922828

Save new group

When you use the advanced group search you can also show the map location.

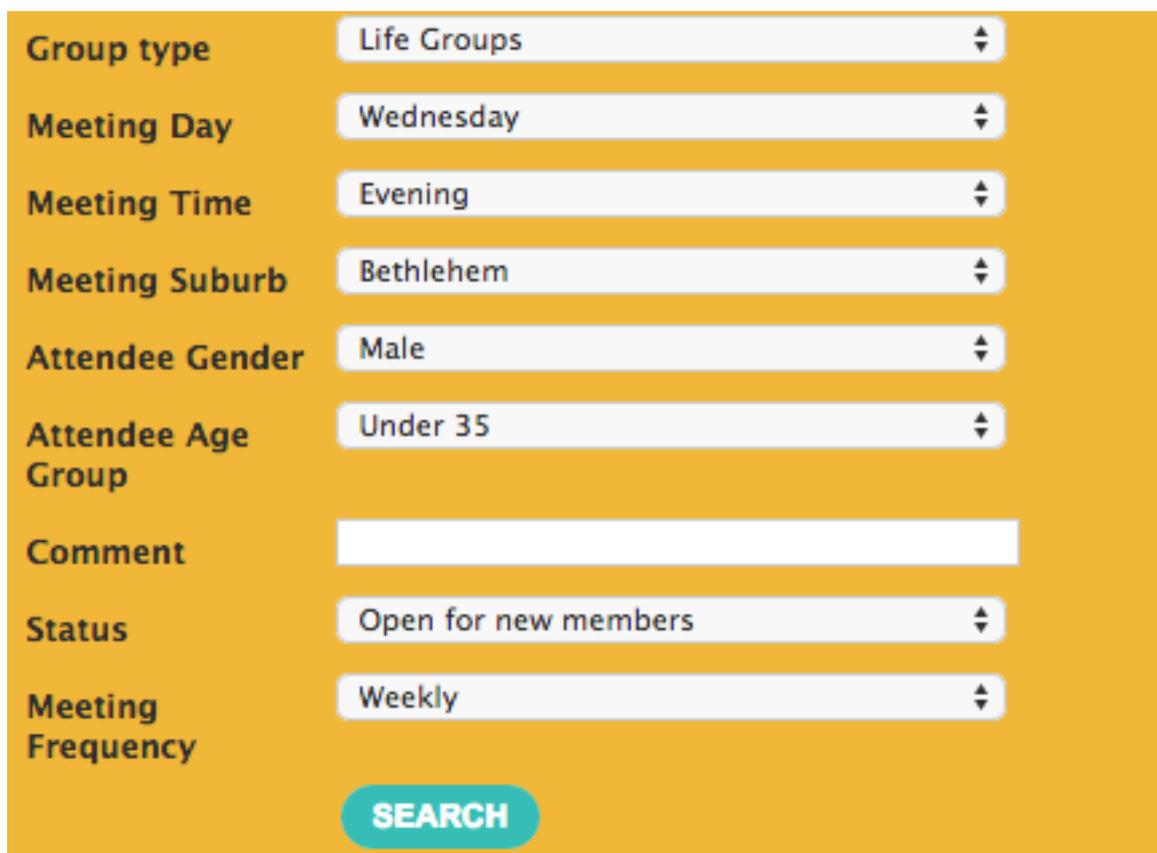
Advanced Search

For example a young man may be looking for a young mens group that meets on wednesday evenings and is in the bethlehem area.

Click on **advanced search** at the top left of page.
To search for a group you must be in the groups section.
If you are on a persons page or your home page you will get a different report option.

▼ ADVANCED SEARCH

Make your selection by clicking in the boxes.



The screenshot shows a search form with the following fields and values:

- Group type: Life Groups
- Meeting Day: Wednesday
- Meeting Time: Evening
- Meeting Suburb: Bethlehem
- Attendee Gender: Male
- Attendee Age Group: Under 35
- Comment: (empty text box)
- Status: Open for new members
- Meeting Frequency: Weekly

A teal **SEARCH** button is located at the bottom of the form.

Then click on **search**.

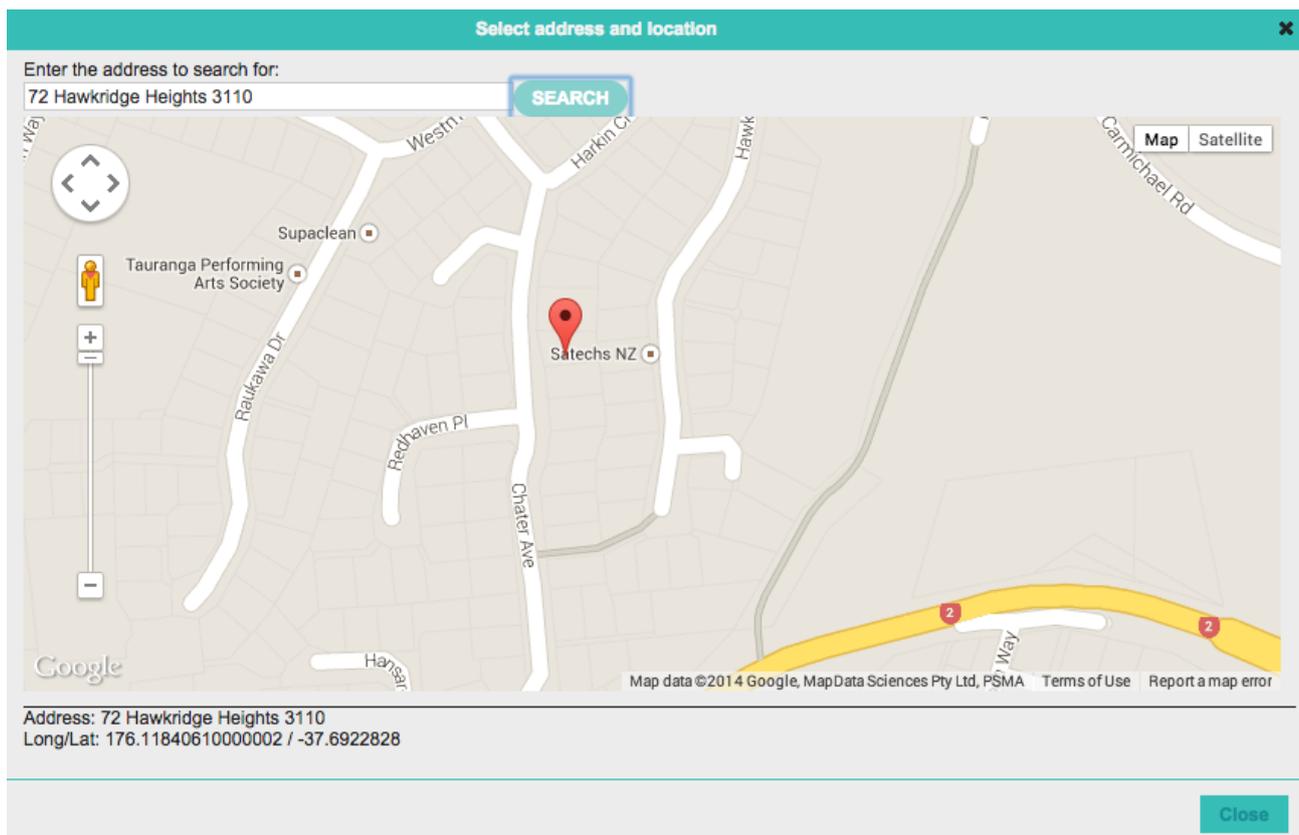
Results

You can see this group is still open for new members to join and are a mostly social group.

Group name	Meeting Day	Meeting Time	Meeting Suburb	Attendee Gender	Attendee Age Group	Comment	Status	Meeting Frequency	Members
Young mens group	Wednesday	Evening	Bethlehem	Male	Under 35	Mostly social group with a short devotion, Seeker friendly.	Open for new members	Weekly	7

SHOW ON MAP

By clicking on the **show on map** button a map will appear.



Deleting a Group

First select the group you want to delete. Then click on **edit** at the top of the page.

EDIT

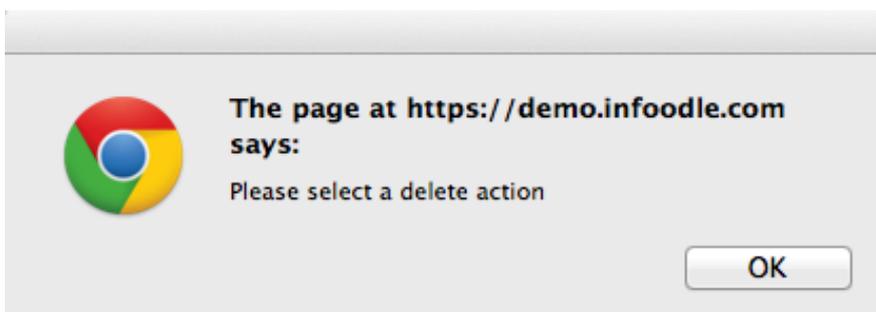
Remember when you delete a group you will lose all the history of people having been a part of this group. If you want to keep the history it is better to hibernate or expire the group.

SAVE

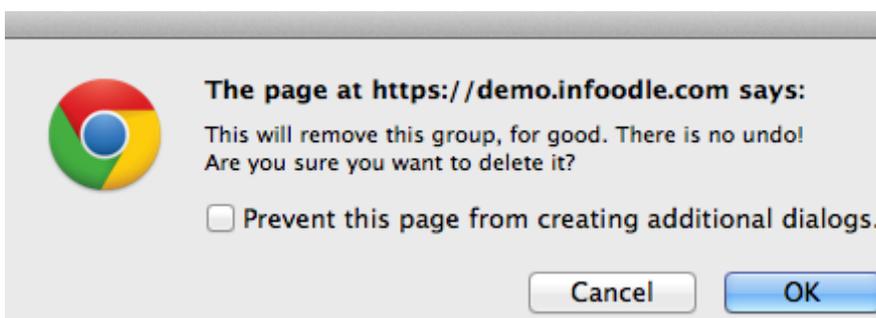
CANCEL

DELETE

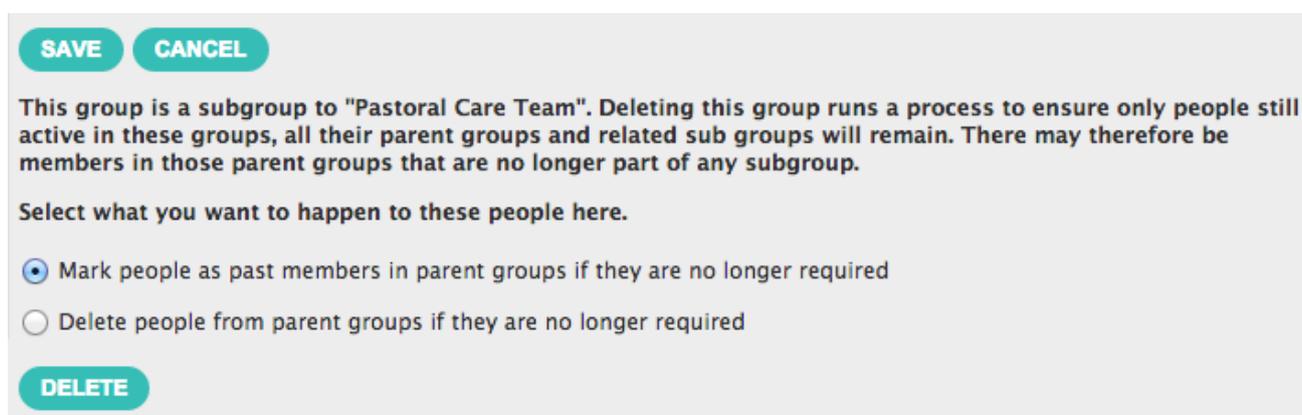
Next click on **OK**



If you are sure you want to delete the group, click **OK** again, or **cancel**



If the group you want to delete is a subgroup you will see this at the bottom of the page.



If you want to keep all in the group as full member or view only, change their permissions in the parent group after the sub group was deleted.

Group Custom fields

If you have the Groups full module you are able to add custom fields to groups.

First your infoodle administrator needs to have created the custom field and made it available to the group type. Refer to the administrators hand book for instruction.

Raglan Details CREATE LOGINS

Total Members : 4
 Show : All Active members (4)

ADD MEMBERS ATTENDANCE Focus on content

Member ▲	Search	Permission	Function	Note	Since	Left Vol. Hrs.
Albert Mr Kent Bob		View only		Wednesdays only	18 Sep 2014	edit
Armstrong Miss Jess		View only		after 3pm only	18 Sep 2014	edit
Booth Mrs Wendy		View only			18 Sep 2014	edit
Smith Mr Robert John		Administrator	Leader		5 Jun 2014	3.00/wk edit

In this example we have added a Note field and removed the team skill. To enter a note click on edit.

Group administration

Booth Mrs Wendy [Raglan] GROUP DATA REMOVE HISTORY

Permission: View only ?
 Function: ?

Date joined: 18/09/2014 ?
 Hours: Annual/One off 0.00 ? Hours as volunteer
 Health & Safety: No
 Note:

Save Cancel

The custom fields are on the right side of the screen. Type in your note and save.

Create Logins

CREATE LOGINS

There may be some occasions when you have created a group and you wish to send a login to each member of the group or to just the active members of a group. You can do this from the group page and click on the **create logins** button near the top right of the screen.

Create Logins

Create and send out logins to members of this group who do not currently have an active login

Permission: Active (View, Full Member and Administrators)
 Select Role to allocate: Infoodle Administrator

Generate Close

Choose which permissions in the group you want to give a login to. ie. you only want to send a login to those who have full member permission.

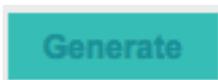
Then select what role you want to give them.

If you are unsure what role to assign to them check with your infoodle administrator.

These roles have been set by your infoodle administrators in the roles area under administration. (Refer to administrators hand book.)

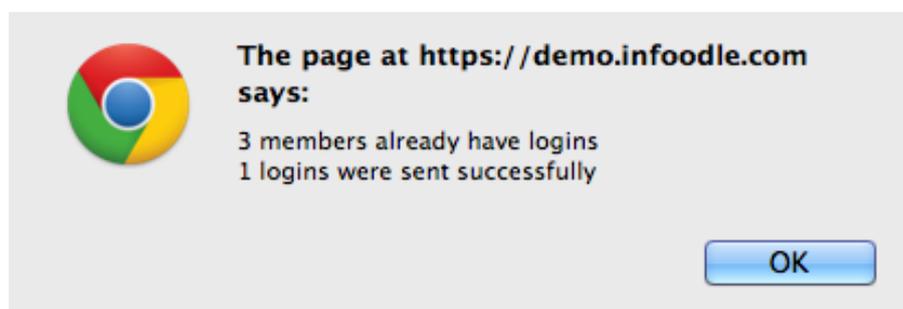
- Fixed roles Full Member and 1
- Infoodle Administrator**
- Managable roles
- Admin 2nd level
- coffee maker
- Congregation Member
- Connect group leader
- Default User
- Directory view
- Life group leader
- Progame co-ordinators
- Staff Administration
- Starter
- Treasurer & finance

Click on **generate**



You will then get a message regarding how many have been sent etc.

In this example 3 already had a login and 1 was sent. If a person does not have the preferred email box ticked the message will add how many were not sent out as they have not had their email set as preferred in their profile. To send these you will need to tick the preferred box beside the persons email address in their profile page.



Those that were sent will now have an email with their username and passwords.

Create Subgroups

As we saw in Groups level 1 training the group structure can comprise of Parent groups and Subgroups, even subgroups of a subgroup.

To do this select the parent group you want to add a subgroup to.

In this example we will make 2 teams in the pastoral care team.

[EDIT](#) [CHANGE PERMISSIONS](#) [CREATE SUBGROUP](#) [CONTACT GROUP](#) [EXPORT](#) [CREATE LOGINS](#)

Pastoral Care Team Details

Total Members : 7
 Show :

[ADD MEMBERS](#) [ATTENDANCE](#) Focus on content

Member ▲	Search	Permission	Function	Team skill	Since	Left	Vol. Hrs.
Bird Mr Craig		Full member					edit
Brown Mr John Dale		Full member					edit
Chapman Mrs Sheryll		Full member					edit
Dodd Mrs Wendy		Full member					edit
Hurn Mr Braden		Full member					edit
Hurn Mr Phil		Full member			31 Aug 2013		edit

Click on **create subgroups**

[CREATE SUBGROUP](#)

Enter details of the name of the sub groups, if you want them to be able to be assigned tasks and see content (see above). You can add more groups if needed.

Create a subgroup

Subgroups enable you to break a group into smaller units, a minimum of two is required. To help with creating these groups, please list all the subgroups you wish to create at this level entering at least their subgroup name.

Subgroup name*	Purpose of this group	Tasks	Content
<input type="text" value="Team A"/>	<input type="text" value="Pastoral care in Northern area"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="text" value="Team B"/>	<input type="text" value="Pastoral care Southern area"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Add
<input type="text" value="Team C"/>	<input type="text" value="Pastoral care Central area"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Delete Add

[ADD PEOPLE TO THESE SUBGROUPS](#)

Then click on the **add people to these subgroups**.

A list of all the members of the parent group will appear with a column for each group. Simply tick each member under the group you want them to be in. Also select what permission you want each member to have in this subgroup.

Ensure each person is added to at least one subgroup by ticking at least one box per row

Member	Search	Permission	Team A	Team B	Team C
		Tick all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bird Mr Craig		Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brown Mr John Dale		Full member	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chapman Mrs Sheryll		Full member	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dodd Mrs Wendy		View only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hurn Mr Braden		Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hurn Mr Phil		View only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Smith Mr Robert John		Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

CREATE SUBGROUPS

Next click on **create subgroup**.

The new subgroups now appear under the parent group in the group list on the left.

Pastoral Care Team [6]
 - Team A [2]
 - Team B [3]
 - Team C [3]

Congratulations you have now completed

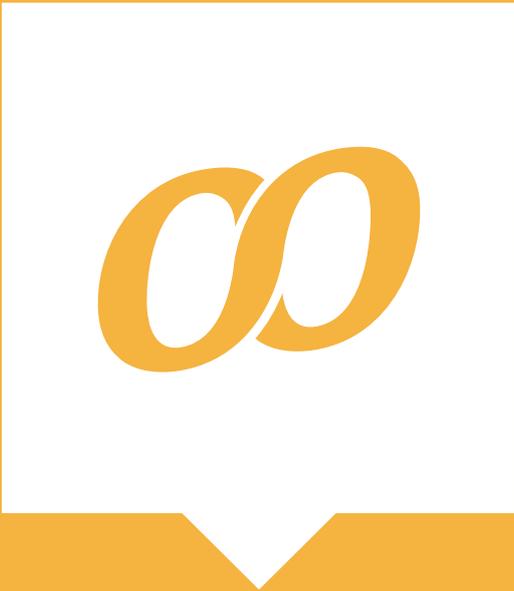
infoodle groups training

Level 3 -Administrating Groups

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



www.infoodle.com
Phone: (+64) 579 3085
Email: sales@infoodle.com

STORE

MANAGE

CONNECT

TRACK