

GETTING STARTED

infoodle
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GETTING STARTED ADMINISTRATORS

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STORE

MANAGE

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TRACK

ADMINISTRATORS GETTING STARTED NOTES

Welcome to infoodle....

By now you should have received an email with your username and password. To login type your URL into the web address search box.

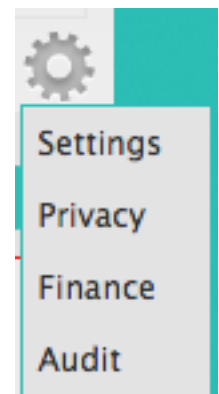
Then enter your username and password. This will then take you to your home page.

Click on **my profile** to review and edit your own profile page.

If you wish to change your username and password. Click on the grey cog at the top right of your screen, then click on settings.

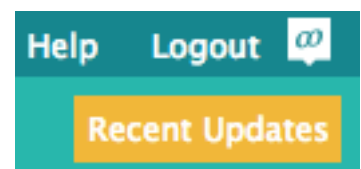
Enter you new user name, enter and confirm your password and **save**.

See Basic Training manual in the **help section** for more details on your profile.



How to find the help section

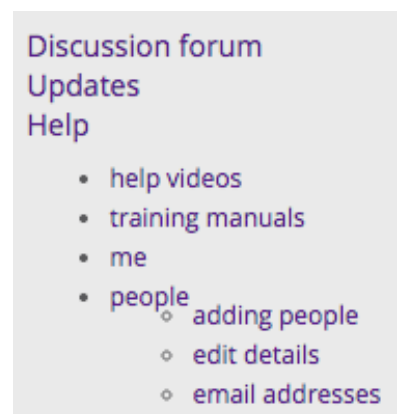
On every page at the very top right you will find **help**.



Here you will find a link to a Discussion Forum, Updates, Help Videos, Training Manuals and Help Notes.

By clicking on any of these you will be taken to a list of further links. Just click to select.

Wherever you are in the website you see a question mark, by clicking on this you will be taken to the help section relating to the area you were in.



It is good to click on **recent updates** from time to time as this keeps you up-to-date with changes, upgrades and bug fixes.

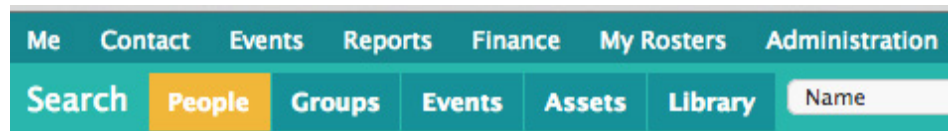
At the far right of your screen there is a **feedback** tab. By clicking in this you will be taken to a message screen. Please use this box to send messages to infoodle support. Infoodle will reply as soon as possible to your request.



As you have the infoodle administrator role there are a few things you may need to set up before rolling infoodle out to the rest of your users.

Administration

Go to **Administration**
This is found above the search bar.



This page shows you which modules you have as active and are available to you and which are inactive. To have inactive modules available you will need to purchase them from infoodle.

Modules

This lists the available modules in infoodle and which ones are active for your setup. The module needs to be active before you are able to give the permission to a role.
[Click here to review what each module does.](#) If you would like to change the settings please contact the infoodle office.

Starter	Active
Actions	Active
Notes	Active

At the top right of the screen there is a button that will take you to other administrator functions, but first lets look at **roles**.



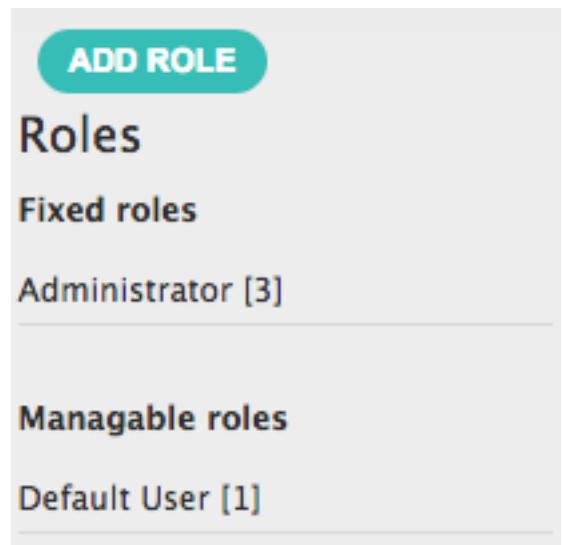
1. Role

This is the term used in order to allocate the functions and permissions of a user. Each user of infoodle must be allocated a role before they can have access to infoodle. A role can be allocated to one or more users.

Our recommendation is to limit a persons permissions in a role rather than give more. It may be easier to give more permission than taking permission away from somebody.

There are **fixed roles**, these are system rolls that cannot be deleted. This is your administrators role.

Manageable roles, are roles you can customise and create your own templates for 1 or more persons with the same permission, e.g. One role for staff and another role for community members.



First check your role by clicking on **infoodle administrator** to ensure you have all the functions ticked. Infoodle has set a default list for you but you may want more or less permissions.

This role screen works by a long series of checkboxes broken up into the various modules. You can only see those that you have available. As you tick a box, a sublist of boxes may appear.

This reflects the hierarchical nature of permissions e.g. to edit people you first need to be able to search them. We have also given you a default user role. This can be edited and assigned to your users.

To create more roles, click on the **add role** at top left of screen illustrated here. Fill in a role name, and select the permissions you want.

Remember any edits and additions need to be **saved**, then you will see this role now appears in the list of manageable roles on the left.

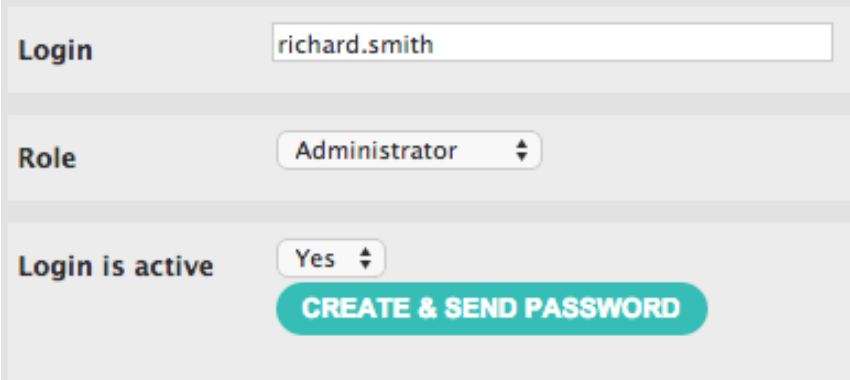
Assigning a role to a user and sending a log-in to a new user

By going to the persons profile page, clicking on their Cog, select settings, you will be taken to this screen.

Select the **role** (click in the box)
Set Login as active to **yes**
and **save**.

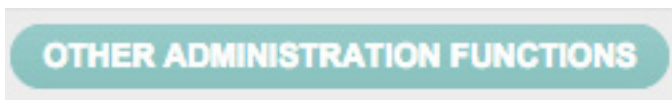
Then click **create and send password**.

A username and password will be automatically generated and sent via email. Therefore this user will need to have their email address activated. (pref box ticked beside email address)



The screenshot shows a user settings form with three rows. The first row is labeled 'Login' and has a text input field containing 'richard.smith'. The second row is labeled 'Role' and has a dropdown menu with 'Administrator' selected. The third row is labeled 'Login is active' and has a dropdown menu with 'Yes' selected. Below these rows is a teal button with the text 'CREATE & SEND PASSWORD'.

Now go back to the administration area and click on the **other administration functions** button.



2. System

Most of this may be set up already for you. If not just work your way through the screens. To get more understanding and help click on **help** at the top right of your screen, watch the help videos, or read notes found under administration.

For a full description go to your Administrators Handbook.

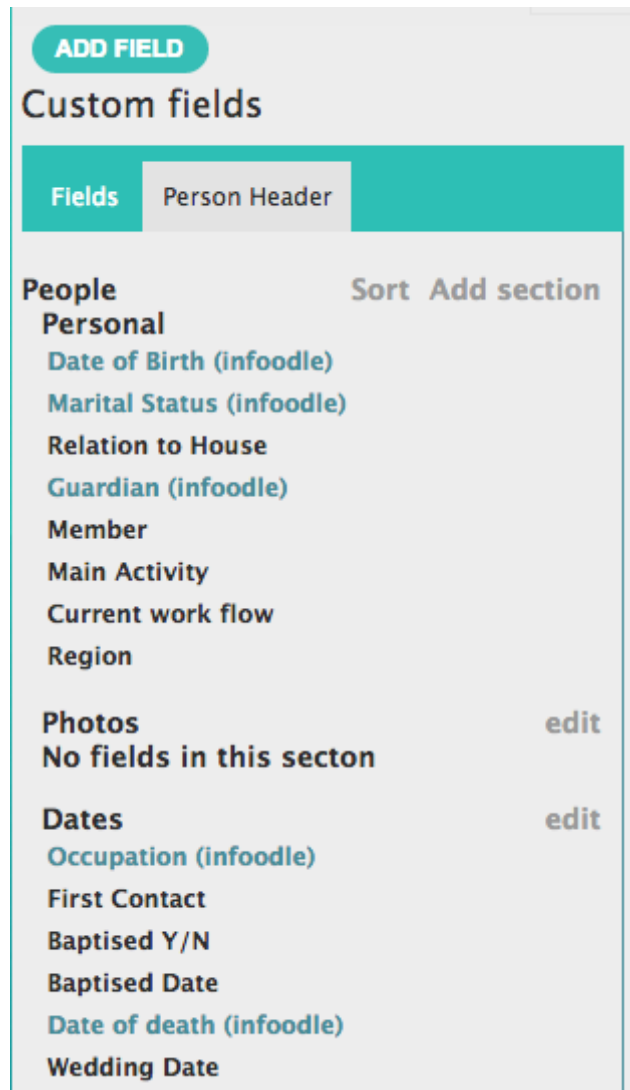
3. Custom fields

Review the list of fields already set up. If infoodle has imported your data check the fields match up with your data. You may want to add more fields or edit some.

By clicking on a custom field on the left, you can make edits to the fields, delete fields, select if you want them available for reporting, where they appear etc. You can also create your own custom fields.

All highlighted fields are system fields and cannot be removed. They can have the name changed and be moved to a different section. For more information see the help system for notes, training manuals or video recordings on Custom Fields. Alternatively book in to attend an online training session.

There is a full Administrators Handbook that has more details.



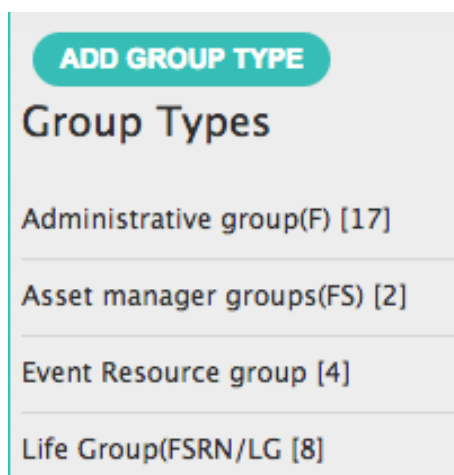
ADD FIELD

Custom fields

Fields Person Header

People	Sort	Add section
Personal		
Date of Birth (infoodle)		
Marital Status (infoodle)		
Relation to House		
Guardian (infoodle)		
Member		
Main Activity		
Current work flow		
Region		
Photos		edit
No fields in this section		
Dates		edit
Occupation (infoodle)		
First Contact		
Baptised Y/N		
Baptised Date		
Date of death (infoodle)		
Wedding Date		

4. Group types



ADD GROUP TYPE

Group Types

- Administrative group(F) [17]
- Asset manager groups(FS) [2]
- Event Resource group [4]
- Life Group(FSRN/LG) [8]

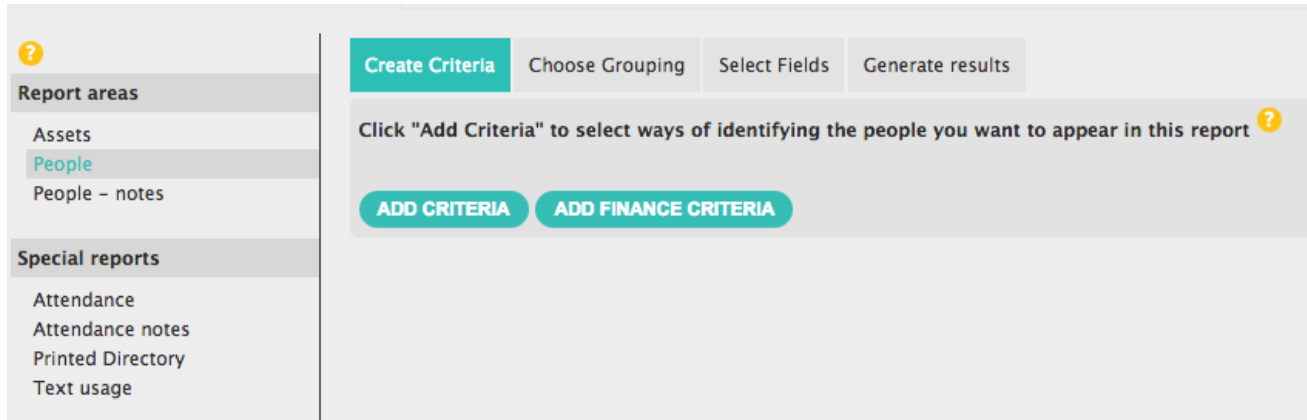
This refers to the type of groups you have or will set up in infoodle. These act as categories of groups. In this example there are 17 administration type groups, 2 asset manager type groups, 4 event organiser groups, 8 life groups etc.

You can add and delete group types. But you can only delete a group type if it is not being used.

By clicking on one of these types you will be able to see which groups are using this group type, select which fields are available to this group type. If you have the Groups full module you are able to add Custom fields to groups.

Check data

Next check your data, if it has been imported by infoodle for you, otherwise go ahead and start entering your own data.



The best way to check your data would be to print a report or the directory. The **report** tab is found on the top of the tool bar.

Select **people** then go directly to **generate results**. By not choosing any criteria you are selecting everyone in the system.

Now select excel spreadsheet file (xls) or plain text file (csv) and send. this will now be on your computer. If a change is needed go to the persons profile page and make edits where needed.

You could also select **printed directory** under the special reports heading. Choose whole directory. Then **generate** and it will show on your screen or generate as a PDF which you can then print.

Select the required data for this report

Generate for

Show under 18s if no parents

Show children surnames if different

Show name labels on emails

Large font

Page layout

This report uses the security settings assigned by each person for "Directory"

If any details are not shown it could be because they have not been entered or they have been set as private. You can easily see if a person has been set to visible or private by the red or green dots beside contact and household details.

Enjoy.

Congratulations you have now completed

administrator getting started

For further training details please refer to help notes, help videos, training manuals or log on to an online training session.



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