

Progressive Technology Project Powerbase Organizing Training

June 21, 2011

9:00am – 9:10am Logistics and review of day's agenda

Facilitator: Josue

9:10am – 9:20am Questions/thoughts/reflections from yesterday

Facilitator: Josue

9:20am – 9:35am Summary Screen

Facilitators: Josue, Robyn

1. Decisions PTP made as to what you see on this screen
Custom sets that are designated as "Inline" show up on the summary screen. Those designated as "Tab" will get their own tabs. For the Demographic custom set we decided to do something special: inject those fields here (point to the screen).
2. Options for you – Tab vs Inline
3. Anyone made changes?
4. Primary language fiasco

9:35am – 9:50am Contact Info

Facilitators: Jack, Jamie

1. Shared Addresses – Edit an individual record, Address section has checkbox for shared address. Look up someone and choose them. Save.
2. Upload picture – Edit an individual record, add image.
3. Twitter, Facebook – Edit an individual record, add twitter handle, facebook page.
4. Greetings – Email greeting, postal greeting, addressee.
 1. Addressee is for mailing labels – show Global Settings -> Address Settings
 2. Show Addressee settings – Option Lists -> Addressee Formats
 3. Email greetings – there is a token called email greeting. You set this in Option Lists -> Email Greeting. See in action by Sending an email
 4. Postal Greeting – there is a token called postal greeting. You set this in Option Lists too. See in action by printing a PDF letter

9:50am – 10:10am Advanced Search

Facilitators: Josue, Robyn

1. Search Views – pick the columns you want to see in the results
Show fields available for SearchResults1 Profile. Do a search and then replace the columns.
Show where the default view for searches can be set in Global Settings.
2. Display Results As – show Participants vs Contacts vs Related Info
Look up Organization Contact Type, who have an Employer Relationship that is active. Then

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change the Results Display type to Related Contacts and choose the Relationship. In this case it is Employee of. Now you have a list of Employees. If you have a profile that shows current employer, you can choose that and see who they work for.

10:10am – 10:30am Exercises

Option 1:

1. Pull up a list of all the children of members whose issue interest is Green Jobs.
2. Create a map of those kids.

Option 2:

1. Pull up a list of all people who have made a donation in the last year.
2. No duplicates.
3. Show me staff responsible and phone number for these folks.

Option 3:

1. I want to send a personalize email to all the Executive Directors of any organization that has had someone attend one of our events in the last year.

10:30am – 10:40am Your Dashboard

Facilitator:

1. Activities
2. Reports
3. What would be useful

10:40am – 11:00am Merging Duplicates

Facilitator:

1. The rules
2. Merging

11:00am – 12:00noon Other “Hidden” Features

Facilitator:

1. New logging mechanism
2. Checking the trash
3. Sending an email and bcc'ing the database
4. Word Replacements

Noon – 1:30pm Lunch

1:30pm – 1:45pm Customizations Conversation

Facilitator: Josue, Jack

1. The challenge with individualized databases
2. The challenge with customizing CiviCRM – UPGRADES!
3. Data entry forms, themes, smart groups – easy ways to customize
4. What we have done – and what we have learned
 - a. CiviCase

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- b. Promises we (Josue!) can't keep
5. Ideal situation – new features that serve many of you

1:45pm - 2:00pm Reports

Facilitators:

1. Review what we have – Debut the Healthy DB Report
2. Show how one small backend change can make report more useful – but has drawbacks
 1. `protected $_customGroupExtends = array('Contact');`
 2. Show examples of the same report with and without the above modification

2:00pm - 2:45pm Custom Searches

Facilitators:

1. Review what we have – Debut the Engagement Search
2. Show the default custom searches
 1. Include/Exclude
 2. Proximity Search

2:45pm - 3:45pm Presentation of Data- what do you need

Facilitators:

1. Small groups – count off 1 – 8, creating 4 groups. (40 minutes)
 1. Each person talk about information that they need to see visually
 2. How often do you need it?
 3. What do you want to do with it?
2. Reportback (40 minutes)
 1. Search or Report?
 2. Commonalities?
 3. What rises to the top? What does PTP need to create?

3:45pm - 4:00pm Break

3:45pm - 4:15pm Presentation of Data- reportback

4:15pm - 4:45 Mailings

Facilitator: Robyn

1. Run thru the wizard
2. Show templates
3. Add images
4. Show source
5. Have people try it out. Make available urls of free templates. Have available different graphics that people could use. Have people send out test messages to each other.
6. Bonus – new feature: Click here to see the mailing on the web.

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5:00pm – 5:30pm Daily Evaluation

Facilitator: