

**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 Search

1. Quick search box
2. Advanced Search
3. Find Participants vs Advanced Search -> Events
 1. Show participant list and accompanying info
 2. Show Advanced Search list, edit criteria and choose Employer Search View

9:35 – 9:50 New Individual

1. Enter new individual
 - a. Enter last name and tab to next fields to bring up potential duplicates
 - b. Add another email address, another phone
 - c. Constituent type is required
 - d. Point out Staff Responsible: assign contacts to your organizers
 - e. Address – review shared address (use Aguilar Household)
2. Save record

9:50 – 10:00 Add a contribution

10:00 – 10:20 Register for an event

1. Explain terminology - Register
2. Is there a different term? Add it and use it!!

10:30 – 12:00 How do you use this data

1. Conversation soliciting workflow needs and showing PowerBase examples for meeting those needs
2. Special data entry could use a custom data entry form (profile)
3. Are you running a campaign? Create one and connect all your things to the campaign
4. Do you turn people out to things? Create an event and “register” people and then use the batch update profile?

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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
 - 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?

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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.

5:00pm – 5:30pm Daily Evaluation

Facilitator: