Simple CIVI TASKS - Research Document
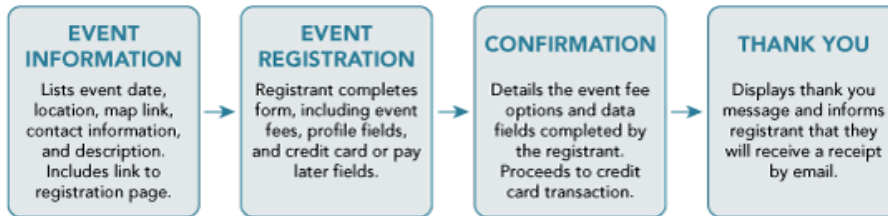

What is CIVI event	Creating an event	Online Event Registration	Reports
Events, participants and contacts	Event Information and Settings		Event Reports
Event types Participant roles Participant statuses	Event Location Fees Online registration Scheduled reminders Tell-A-Friend Registration confirmation and receipting	Setting up online registration Collecting participant information with profiles Registration confirmation	Searching based on participant data Event and participant reports Create an event report from a template More analysis
Other parts of CiviCRM that work with CiviEvent		Optional event registration features	Displaying an event report on CiviCRM 's home dashboard
		Waitlists Participant approval Personal Campaign Pages Contact matching and duplicate management Registration permissions Testing the registration process	Creating Smart Groups

Videos

Civi for complete beginners – You Tube vid

Civi CRM introduction – YOu Tube Vid

CIVI Glossary – all the terms you have heard of on CIVI and more - explained

Groups Vs Tags

Tag	Group
• *volunteer*, • *Campaigner organisation*, • *vegetarian* • and *musician* would be tags with which you could categorise contacts .	*Volunteer Committee,* *Allied Organisations Coalition,* *Vegetarian Newsletter*, Local events – music would be groups to which you could add contacts.

Can we record and anaylsie hard numerical data that we can report our impact?

Basic - The Who vs the How many

Searching based on participant data¶(from reports)

CiviCRM makes an important distinction between contacts and event participants. Sometimes it is useful to get the answer to your event related question in terms of contacts, e.g. which contacts came to events in 2011. Other times it is more useful to have the answer in terms of participants, e.g. how many training sessions did we deliver as part of our sexual health education programme this year. It is important to take this into consideration when carrying out a search for event attendees.

The **Find participants** search allows you to search based on participant data and return participant data. The **Advanced search** allows you to search based on most participant information and combine that with other contact information and return contacts. You can also choose **Participant** from the **Display Results As** column to show participants rather than contacts.

Searching based on these criteria gives you access to simple totals. You can also export your search results as CSV for further analysis in your spreadsheet software

Use CiviCampaign?

CiviCampaign lets you link together events, mailings, activities, and contributions under one "umbrella" so that you can track the progress of all your efforts towards one programmatic goal or campaign. This enables organizations to measure and analyze the effectiveness of their outreach and mobilization efforts.

Action: suggest a trial with Social prescribing programme