

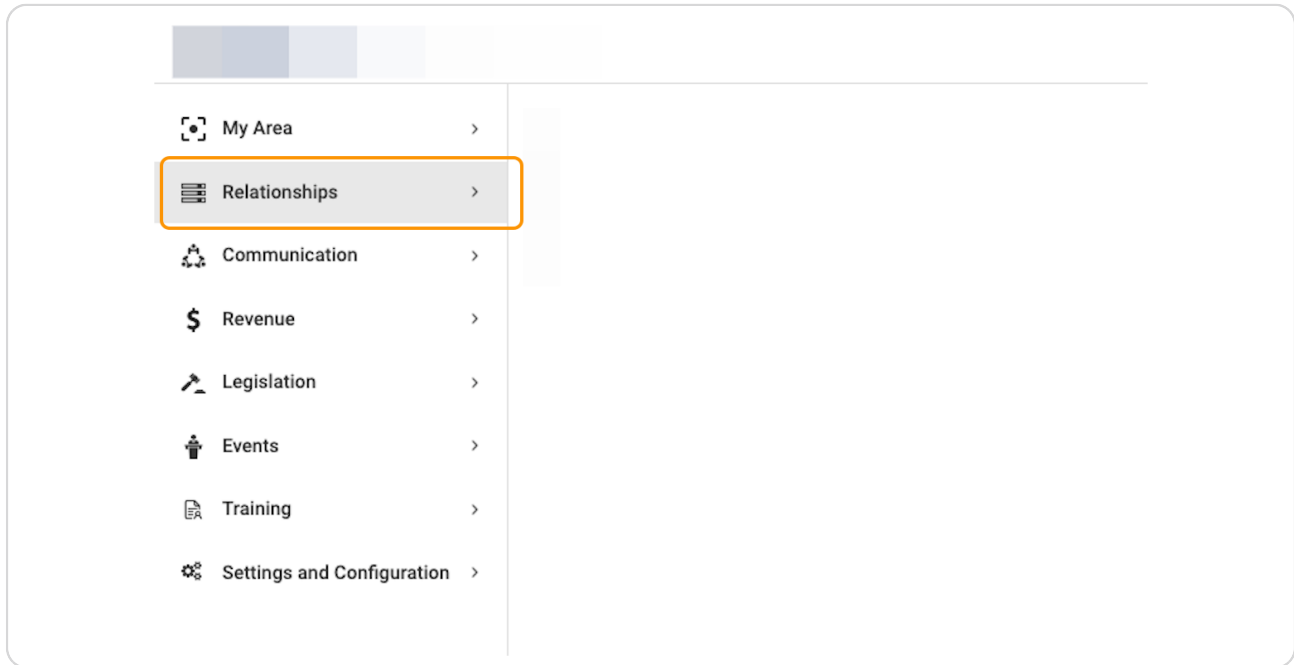
Last Updated Reports - People

27 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Engagifii Inc.	Sep 12, 2024	Sep 13, 2024

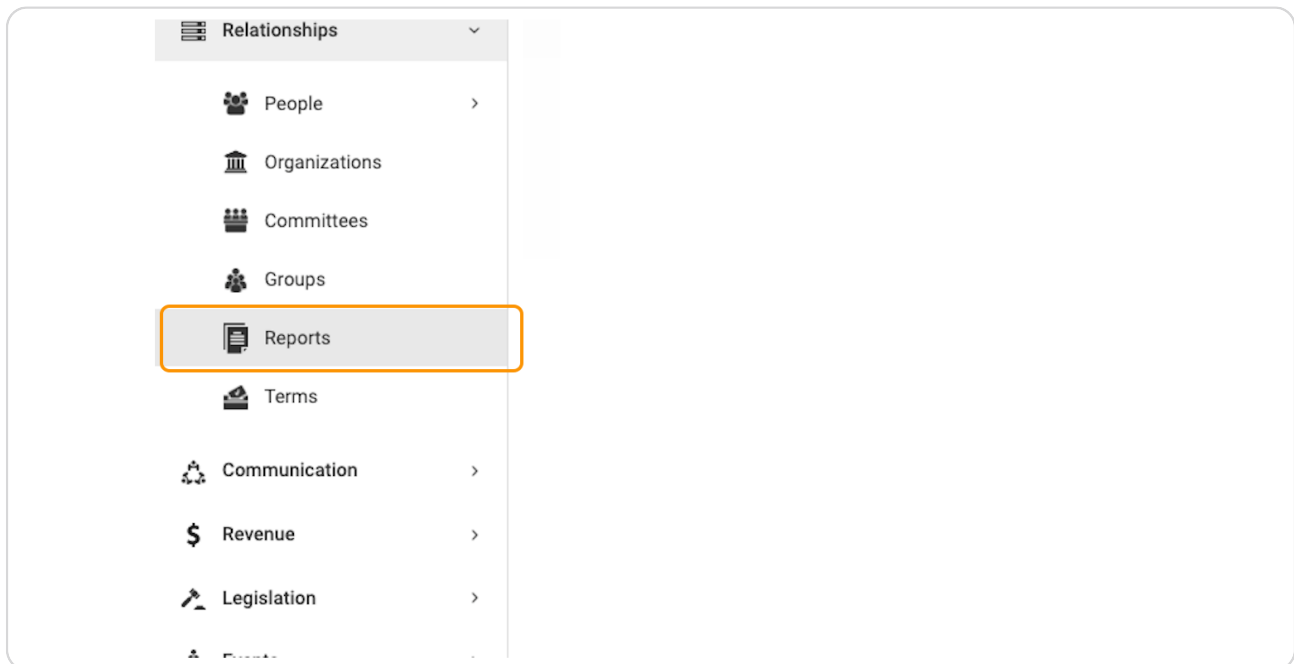
STEP 1

Click on Relationships



STEP 2

Click on Reports



STEP 3

Here are the two types of Last Action Report available - for People and Organizations.

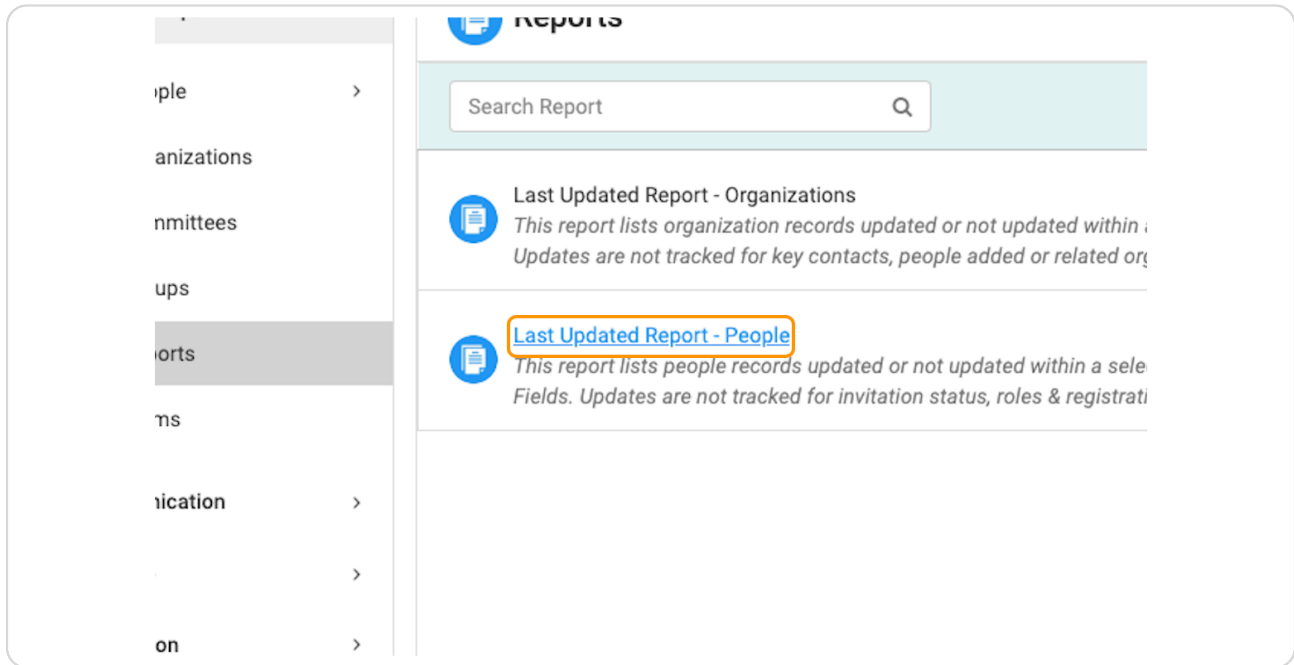
The screenshot displays the 'Reports' section of the Crescance Admin interface. The breadcrumb trail shows 'Home / Relationships / Reports'. The user is identified as 'Crescance Admin'. The 'Reports' section includes a search bar and a pagination control showing 'Page 1/1' and '10 of 2 Records'. Two report options are listed:

- Last Updated Report - Organizations**
This report lists organization records updated or not updated within a selected time range. Updates are tracked for Name, Tag(s), Profile Picture, Basic Information, and any Custom Fields. Updates are not tracked for key contacts, people added or related organizations.
- Last Updated Report - People**
This report lists people records updated or not updated within a selected time range. Updates are tracked for Name, Is Instructor, Tag(s), Profile Picture, Basic Information, and any Custom Fields. Updates are not tracked for invitation status, roles & registrations.

The page also features a navigation bar at the bottom with a page number '1' and navigation arrows.

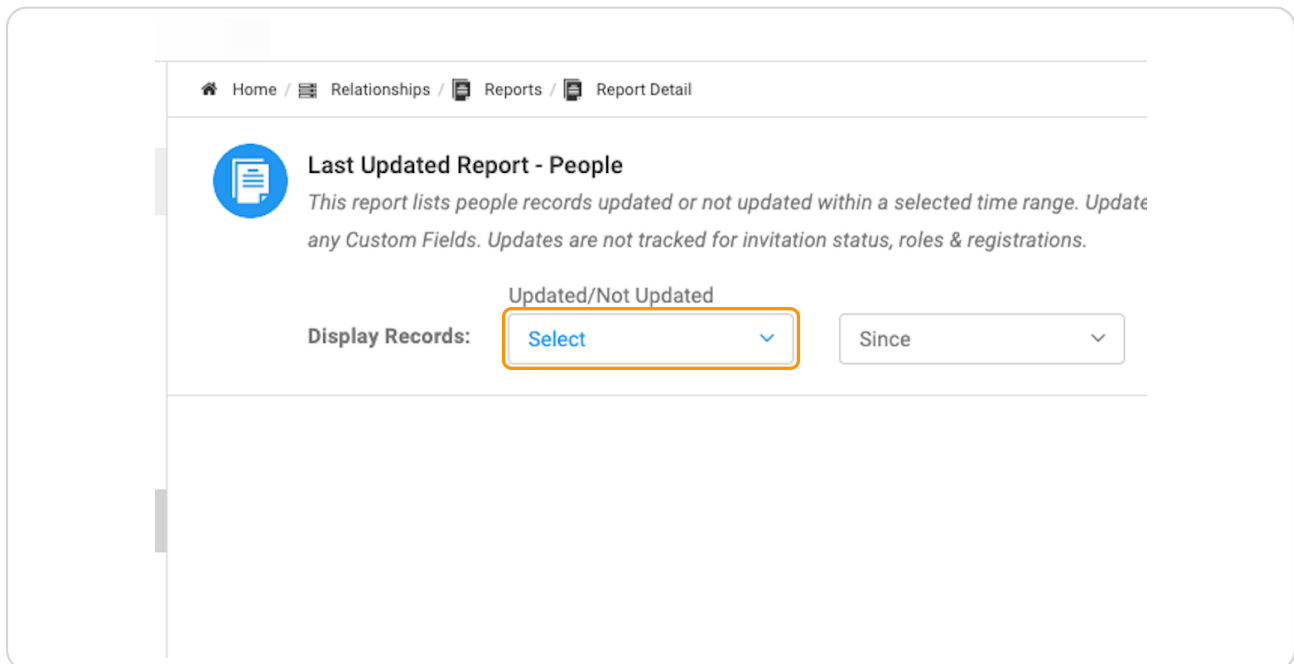
STEP 4

Let's look at the Last Updated Report - People




STEP 5

Click on Select to begin creating your report criteria



STEP 6

Make your desired selections

 **Last Updated Report - People**
This report lists people records updated or not updated within a selected time range. Update any Custom Fields. Updates are not tracked for invitation status, roles & registrations.

Display Records: Updated/Not Updated


Select Since

Updated

Not Updated

STEP 7

Click on Since to narrow parameters

Reports /  Report Detail

port - People
*ople records updated or not updated within a selected time range. Updates are tracked for Name, Is Instructor
Updates are not tracked for invitation status, roles & registrations.*

Updated/Not Updated

Not Updated Since Time Range

Date

STEP 8

Click on Within

port - People
*People records updated or not updated within a selected time range. Updates are tracked for Name, Is Instructor
Updates are not tracked for invitation status, roles & registrations.*

Updated/Not Updated Not Updated ▼

Time Range Date 📅

Since ▼

- Since
- Within**

STEP 9

Click on Select date range

*in a selected time range. Updates are tracked for Name, Is Instructor, Tag(s), Profile Picture, Basic Inform
atus, roles & registrations.*

Time Range

Within ▼ Select date range ▼ Show Results

STEP 10

Click on Last 90 days

d within a selected time range. Updates are tracked for Name, Is Instructor, Tag(s), Profile Picture, Basic Information, on status, roles & registrations.

Time Range

Within Select date range Show Results

Last 30 days

Last 60 days

Last 90 days

Custom Date Range

Start Date End Date

MMM DD,YYYY 📅 - MMM DD,YYYY 📅

STEP 11

Click on Show Results when finished making selections

ed for Name, Is Instructor, Tag(s), Profile Picture, Basic Information, and

ange

days Show Results

STEP 12

A list of all the people who fall into the set parameters will now appear.

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STEP 13

Click on Request Update to send an email requesting an individual update

Search Person Type	Last Updated	Search Position	Action
Staff	Dec 07, 2021 at 6:38 PM	Board Secretary	Request Update
Member	Dec 07, 2021 at 6:13 PM	Board Vice Chair	Request Update
Staff	Dec 07, 2021 at 6:48 PM	Board Secretary	Request Update
Member	Dec 07, 2021 at 6:11 PM	Board Vice Chair	Request Update
Member	Dec 07, 2021 at 6:13 PM	Board Vice Chair	Request Update
Member	Dec 07, 2021 at 6:10 PM	Board Vice Chair	Request Update

STEP 14

Or select all to send a mass update request

Last Updated Report - People

This report lists people records updated or not updated within a selected time range. Updates are tracked for Name, Is Instructor, Tag(s), Profile Picture, Basic Information, and any Custom Fields. Updates are not tracked for invitation status, roles & registrations.

Updated/Not Updated: Within: Time Range: [Show Results](#)

All People (Not Updated within Jun 15, 2024 - Sep 13, 2024) [Request Update \(114 selected\)](#) Page 1/12 | 10 of 114 Records

All 114 are selected. [Clear Selection](#)

	Search All People	Search Primary Organization	Member Org Lead	Search Person Type	Last Updated	Search Position	Action
<input checked="" type="checkbox"/>	Alex Administrator-XSBA	KACo		Staff	Dec 07, 2021 at 6:38 PM	Board Secretary	Request Update
<input checked="" type="checkbox"/>	Gina Griffin-High	Griffin High School		Member	Dec 07, 2021 at 6:13 PM	Board Vice Chair	Request Update
<input checked="" type="checkbox"/>	Ian Instructor	KACo		Staff	Dec 07, 2021 at 6:48 PM	Board Secretary	Request Update
<input checked="" type="checkbox"/>	Marcus Middle-High	Middle Georgia High School		Member	Dec 07, 2021 at 6:11 PM	Board Vice Chair	Request Update
<input checked="" type="checkbox"/>	Megan Metro-High	Metro High School		Member	Dec 07, 2021 at 6:13 PM	Board Vice Chair	Request Update
<input checked="" type="checkbox"/>	Ophelia OK-High	Okefenokee High School		Member	Dec 07, 2021 at 6:10 PM	Board Vice Chair	Request Update
<input checked="" type="checkbox"/>	Oscar Oconee-High	Oconee High School		Member	Dec 07, 2021 at 6:11 PM	Board Vice Chair	Request Update
<input checked="" type="checkbox"/>	Tiberius Teacher	Chattahoochee Town		Member	Dec 07, 2021 at 7:08 PM	Board Chair	Request Update

STEP 15

Select email recipients

Send Request: Person Profile Update

1 RECIPIENTS: Select the recipients for sending the email.

In the previous step, you selected 114 people. Please choose how you to send them the email for updating profile details.

Email the person only

Email the person and their respective Member Admin (Organization Lead)

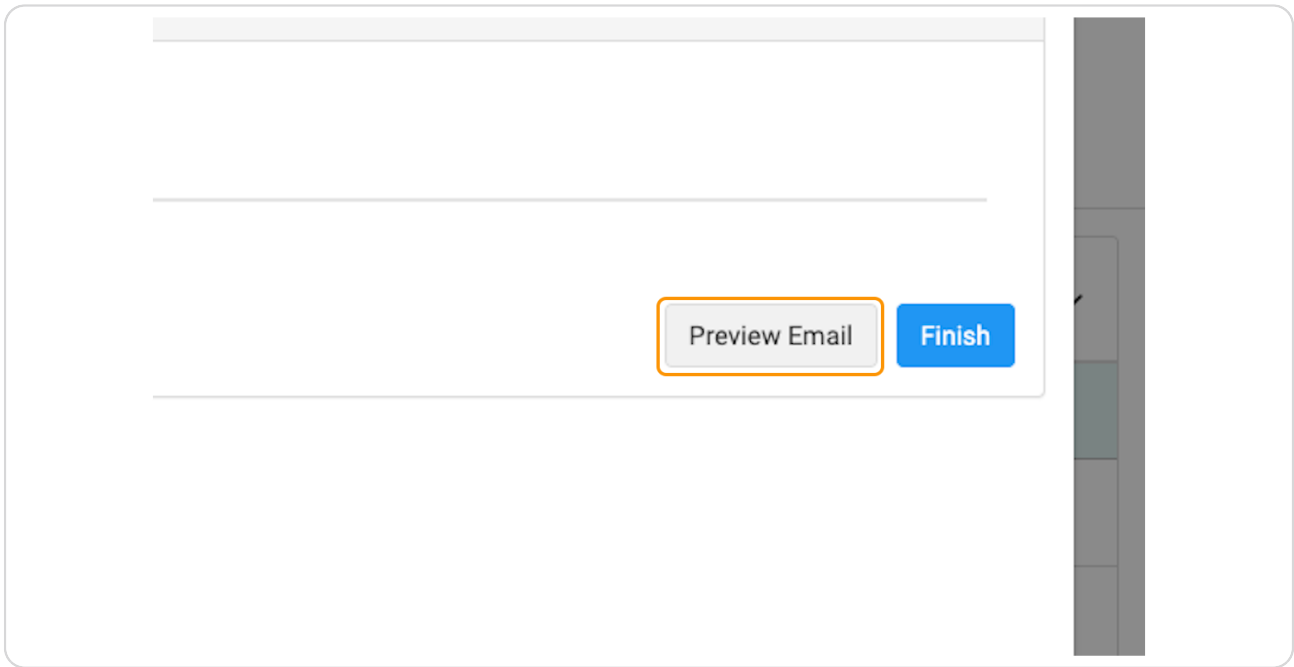
[Preview Email](#) [Save and Proceed](#)

2 SCHEDULE - Select when to send the email.

[Cancel](#) [Send Request](#)

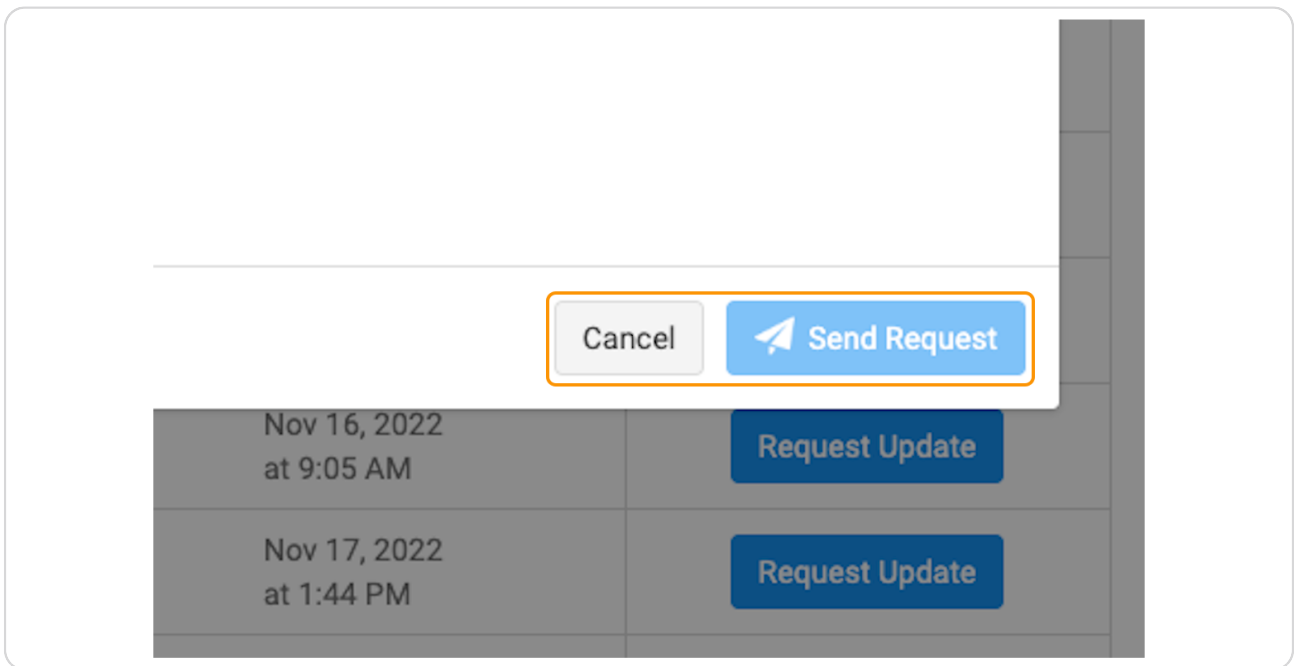
STEP 16

Click on Preview Email



STEP 17

Click on Cancel or Send Request when finished



STEP 18

To export a report, check the box to select all people

The screenshot shows the 'Last Updated Report - People' interface. The left sidebar contains navigation options like 'My Area', 'Relationships', 'People', 'Organizations', 'Committees', 'Groups', 'Reports', 'Terms', 'Communication', 'Revenue', 'Legislation', 'Events', 'Training', and 'Settings and Configuration'. The main content area displays the report details, including filters for 'Updated/Not Updated', 'Display Records', and 'Time Range'. Below the filters, there is a table of people with columns for 'Search All People', 'Search Primary Organization', 'Member Org Lead', 'Search Person Type', and 'Act'. The table lists several individuals, each with a checkbox and a 'Request' button. The 'Request Update (10 selected)' button is highlighted, and the 'Select all 114' link is visible.

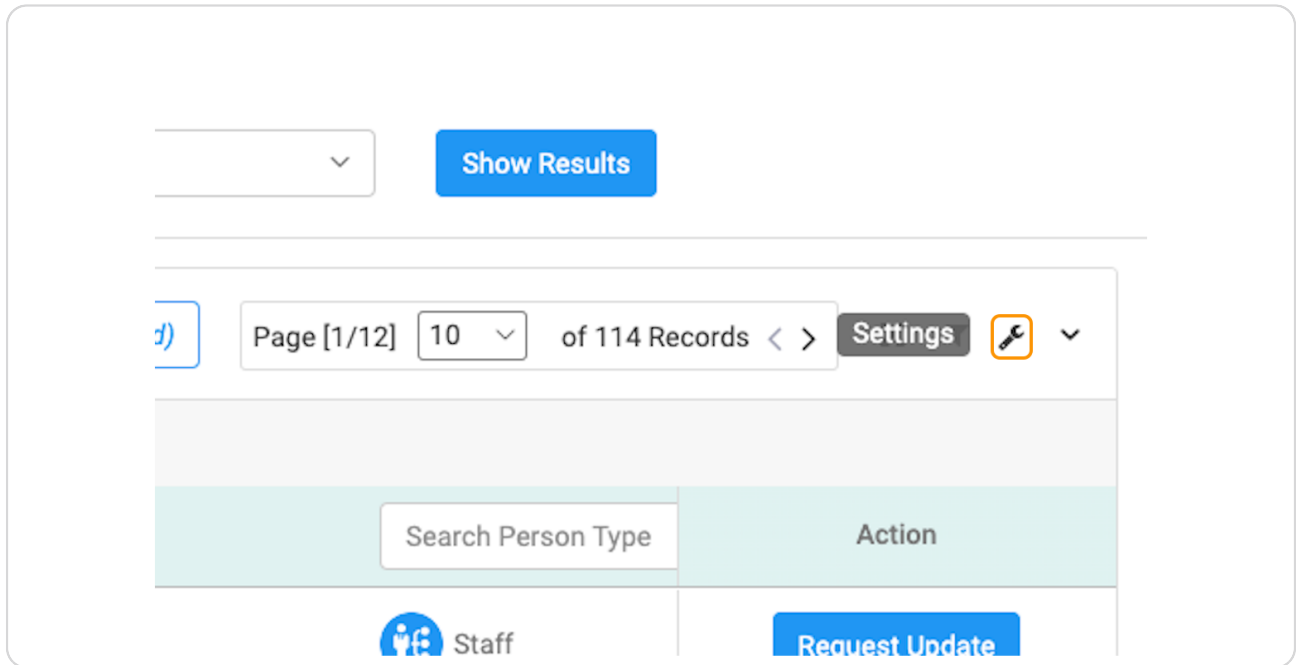
STEP 19

And make sure you select all to be exported

This is a close-up view of the 'All People' section. It shows the 'Request Update (10 selected)' button and the 'Select all 114' link, which is highlighted with an orange box. Below this, there is a table with columns for 'Search Primary Organization', 'Member Org Lead', and 'Search Person Type'. The table lists several individuals, each with a checkbox and a 'Request' button. The 'Select all 114' link is highlighted with an orange box.

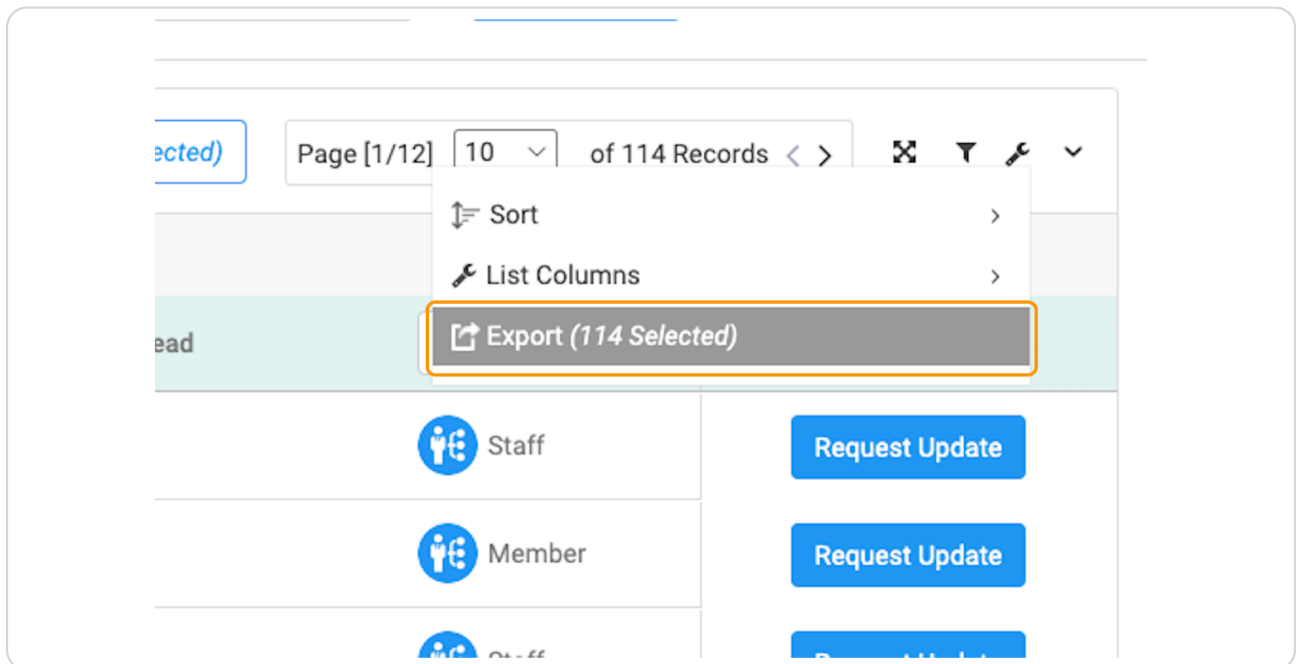
STEP 20

Click on the wrench icon to access the Settings



STEP 21

Click on Export (114 Selected)



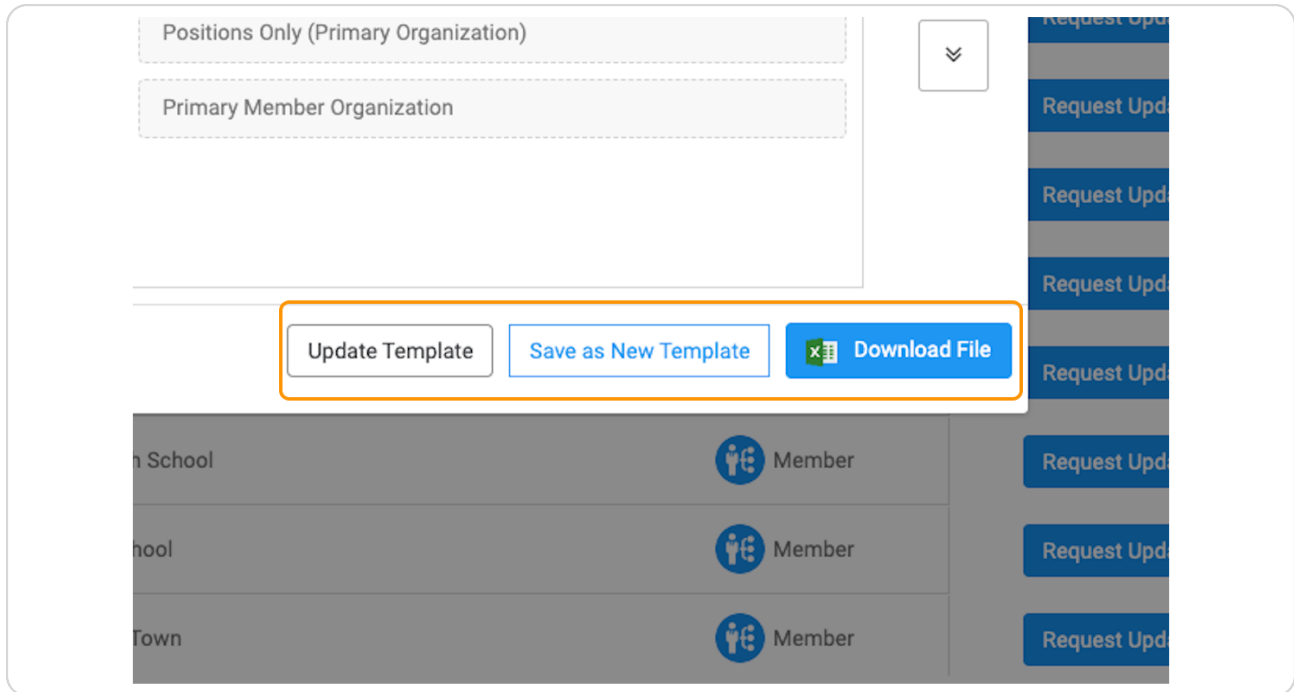
STEP 22

Select and drag the fields you want on your report or if you've previously created a report template, chose that.

The screenshot displays a software interface for creating an export report. A modal window titled "Export For Last updated People Report (114 Selected)" is open. At the top, a blue instruction bar reads: "The left column presents all available fields for inclusion in the export. Drag fields from the left to the right to include them in the export. Additionally, utilize the buttons on the right to adjust the sequence of fields in your export." Below this, the "Template" section features a dropdown menu labeled "Select Template" with "email" chosen. To the right, the "Selected Fields" section contains three items: "First Name", "Last Name", and "Primary Email". Navigation arrows are present between the two columns. At the bottom of the modal, there are three buttons: "Update Template", "Save as New Template", and "Download File". The background shows a sidebar with navigation options like "My Area", "Relationships", "People", "Organizations", "Committees", "Groups", "Reports", "Terms", "Communication", "Revenue", "Legislation", "Events", "Training", and "Settings and Configur". A list of members is visible at the bottom, including Ophelia OK-High, Oscar Oconee-High, Tiberius Teacher, Okefenokee High School, Oconee High School, and Chattahoochee Town, each with a "Request Update" button.

STEP 23

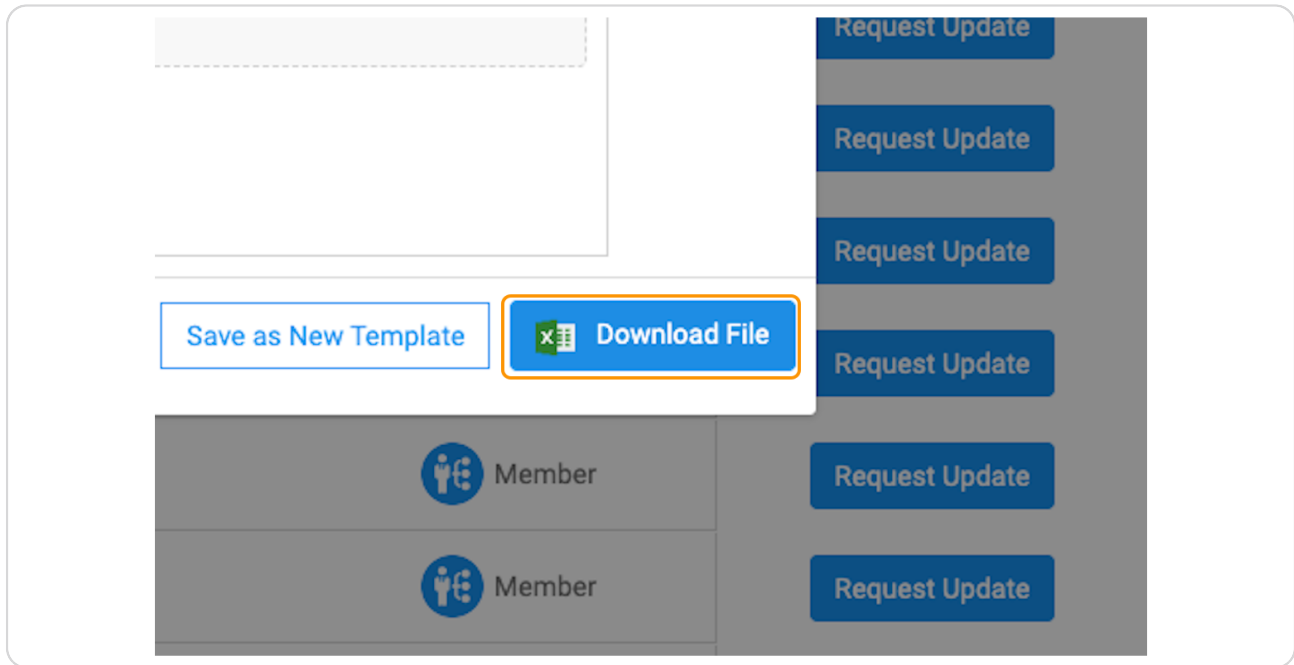
Once finished, you can either update an existing template, save as a new template or just download a one off report.



The screenshot displays a user interface for managing templates. At the top, there are two input fields: "Positions Only (Primary Organization)" and "Primary Member Organization". To the right of these fields is a dropdown arrow icon. Below the input fields, a horizontal bar contains three buttons: "Update Template", "Save as New Template", and "Download File". The "Download File" button features a small Excel icon. Below this bar, a table lists three rows, each representing a different organization type: "n School", "hool", and "Town". Each row includes a "Member" icon and a "Request Upd" button. The "Download File" button is highlighted with an orange border.

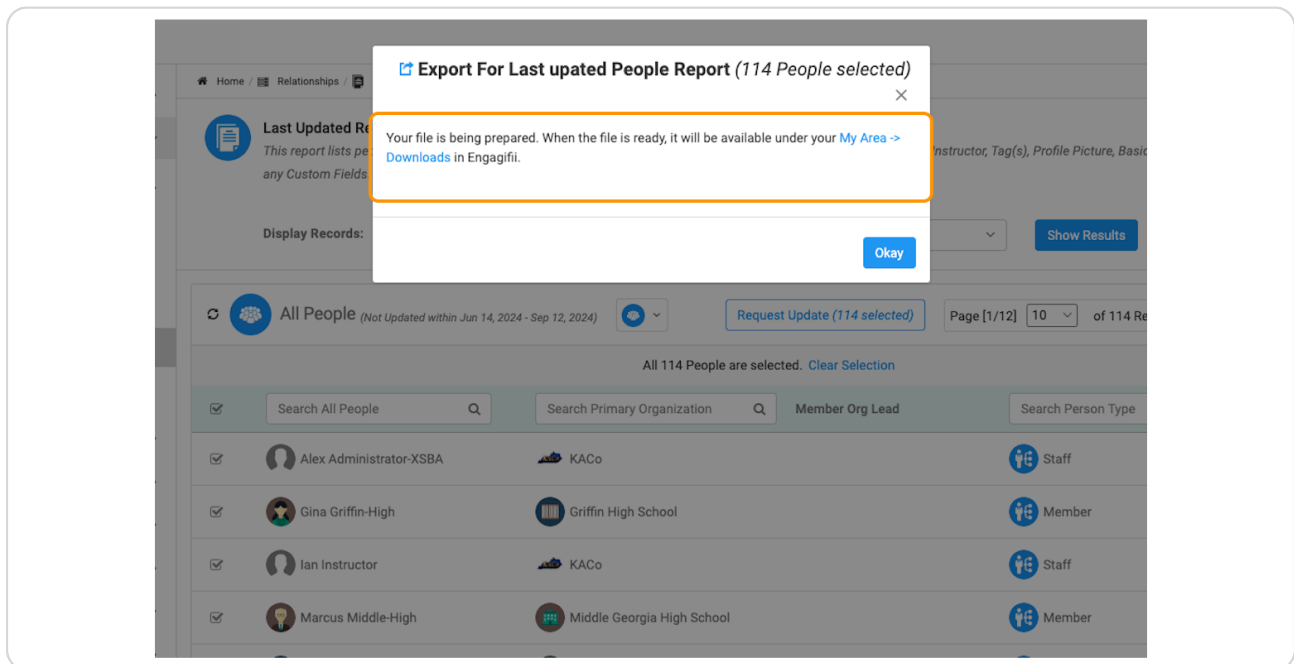
STEP 24

Click on Download File



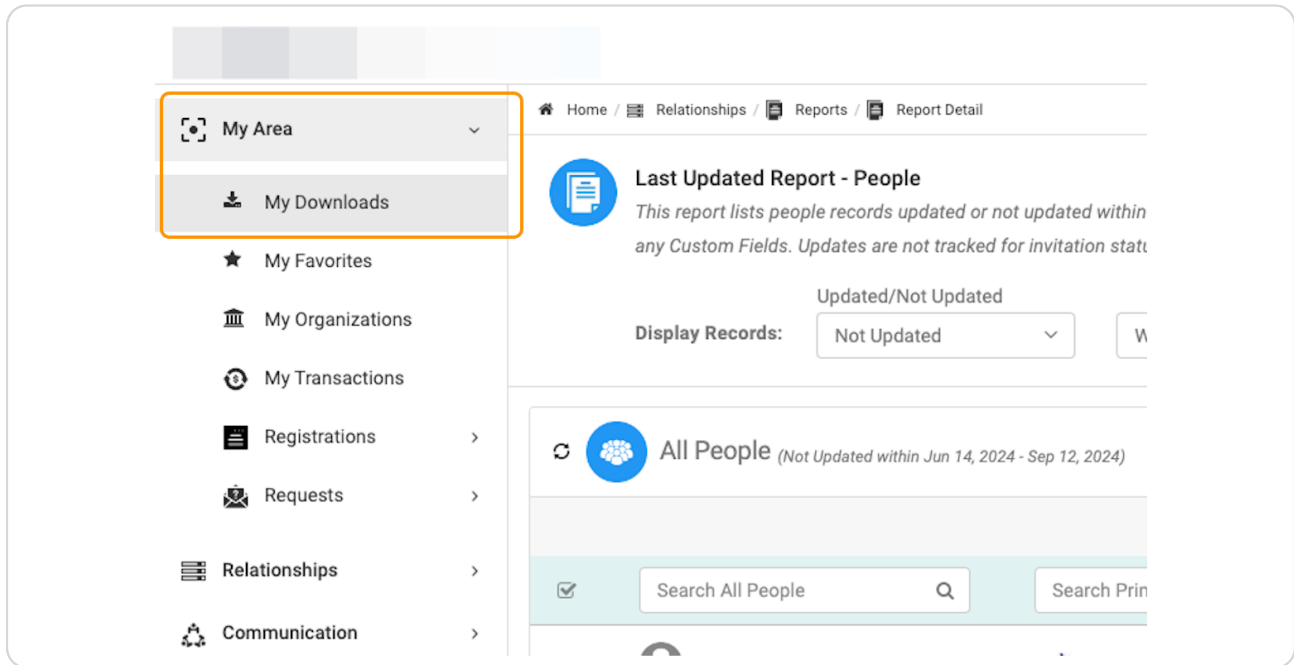
STEP 25

Your report will be available in the My Area / My Downloads Area



STEP 26

Click on My Downloads



STEP 27

Click on your report to view

