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Installing Toodles!

Installing Toodles! on a standalone workstation

Follow these instructions if you intend to install the software on a single PC and other users won't need access to the same data files from other workstations on your network.

(If you want to configure the software so that other users can access the same data from workstations on a network, please follow the instructions in the **Installing Toodles! for Network Access** Section of this document.)

Download and launch ToodlesSetup.exe from a local drive.   On Windows Vista and later versions of Windows, you'll be prompted for an Administrator login and password as soon as you launch the setup program.   The dialog looks like this:
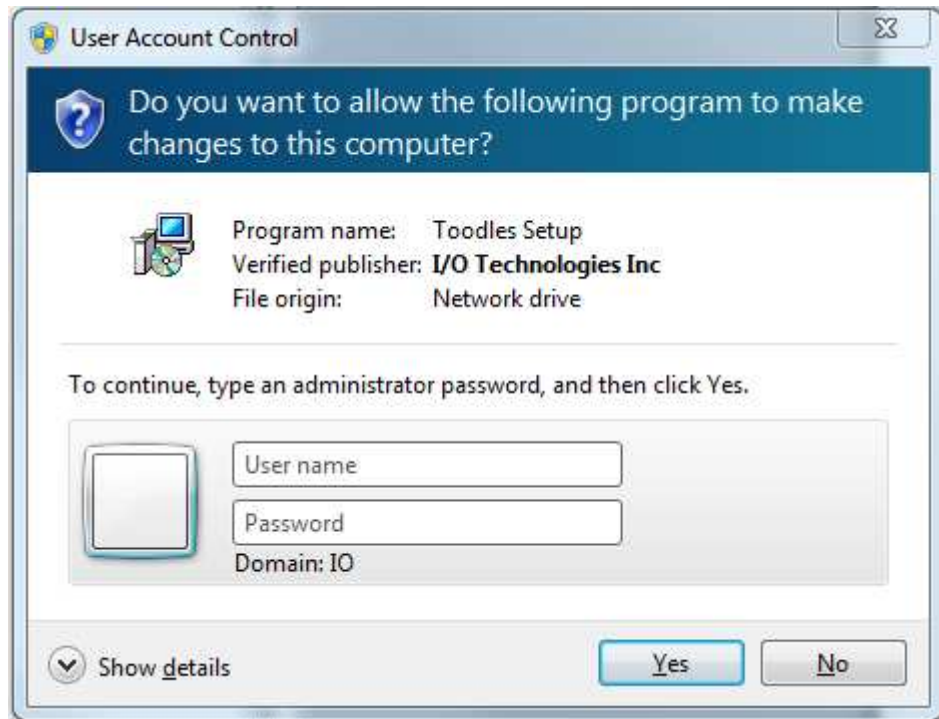

Then the following dialog will appear.

Press the Next button to continue to the End User License Agreement page:

Review the agreement by scrolling down to the bottom.   If it meets with your approval, click the acceptance radio button. Then press Next.

Because this application was written to accommodate multiple users, you can specify a target install folder.

- If you want to configure the software so that other users can access the same data from workstations across a network, please follow the instructions in the **Installing Toodles! for Network Access** Section of this document.

- If you will be installing this on a laptop or single workstation, feel free to accept the default:
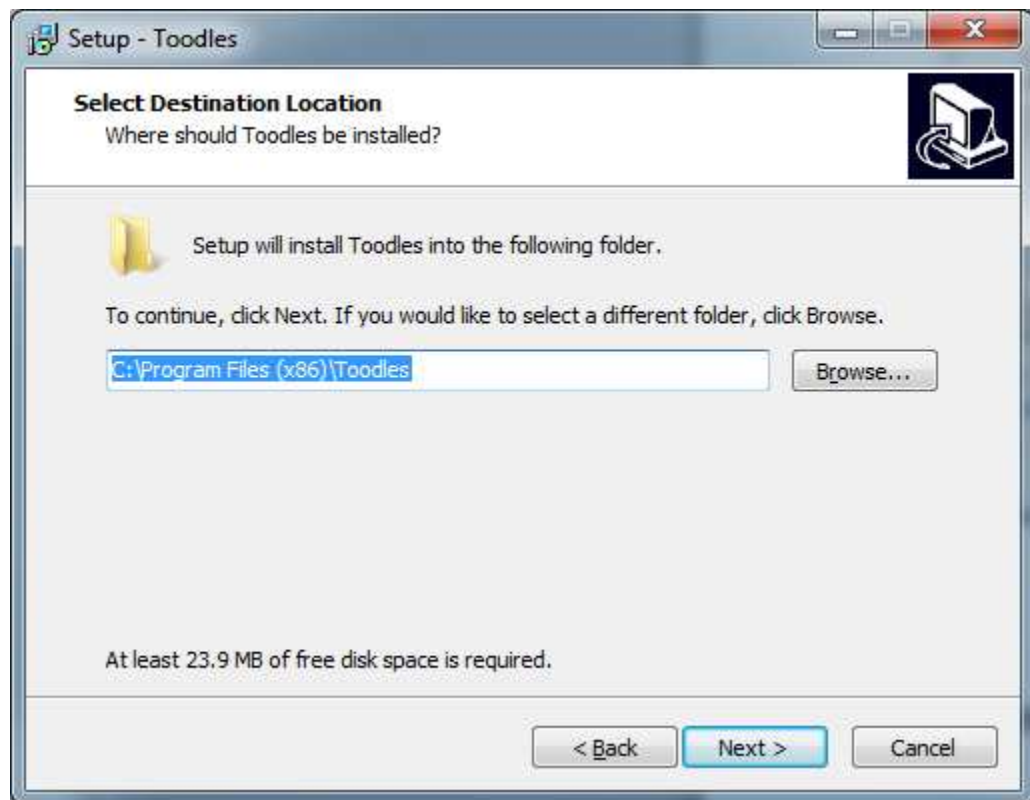
Press Next to continue.

The installer will automatically create a desktop shortcut, as well as create a shortcut in the computer's start menu. By default, it will create shortcuts in a new Toodles! folder in the start menu. If desired, you can specify a different folder by pressing the browse button.
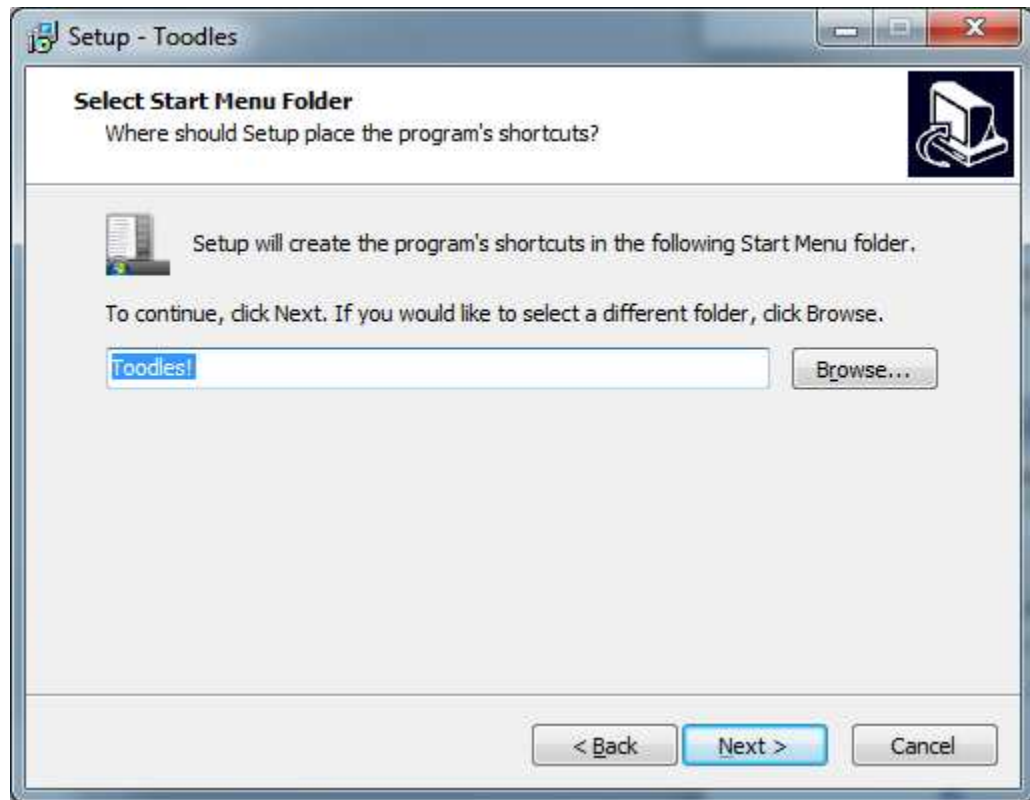
Press Next to continue.

The installer will display a list of folders that will be created.
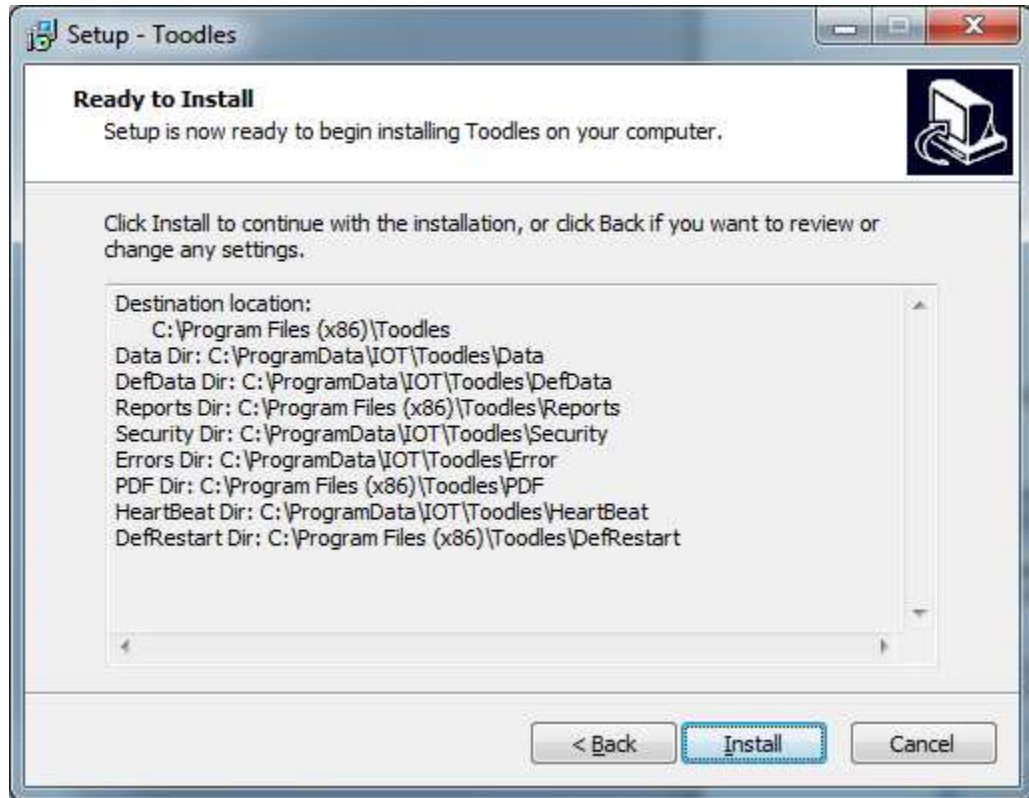
Press the Install button to continue.

The installer will now create the necessary folders and files. When it has finished, the following dialog will appear.

Press the Finish button to complete the installation.

Installing Toodles! for Network Access

Follow these instructions if you want to install the software on a network, so that multiple users can access the same data from multiple workstations.

You must install the application directly on the server, logged in as Administrator. You can do so via Remote Desktop or other remote connectivity software; just be sure the installation runs on the server itself.

(If you want to install the application for a single user on a standalone workstation, please follow the instructions in the **Installing Toodles! on a standalone workstation** Section of this document.)

Toodles! can be installed on a peer-to-peer network, or file servers running Windows Server 2003 or higher. Linux and Mac environments are not supported.

Launch ToodlesSetup.exe from a local drive on the server.   Depending on server version, you may be prompted for and Administrator login and password as soon as you launch the setup program.

The dialog will look something like this:

Then the following dialog will appear.

Press the Next button to continue to the End User License Agreement page:

Because this application was written to accommodate multiple users, you can specify a target install folder.

- If you want to configure the software so that other users can access the same data from workstations across a network, follow the instructions below.
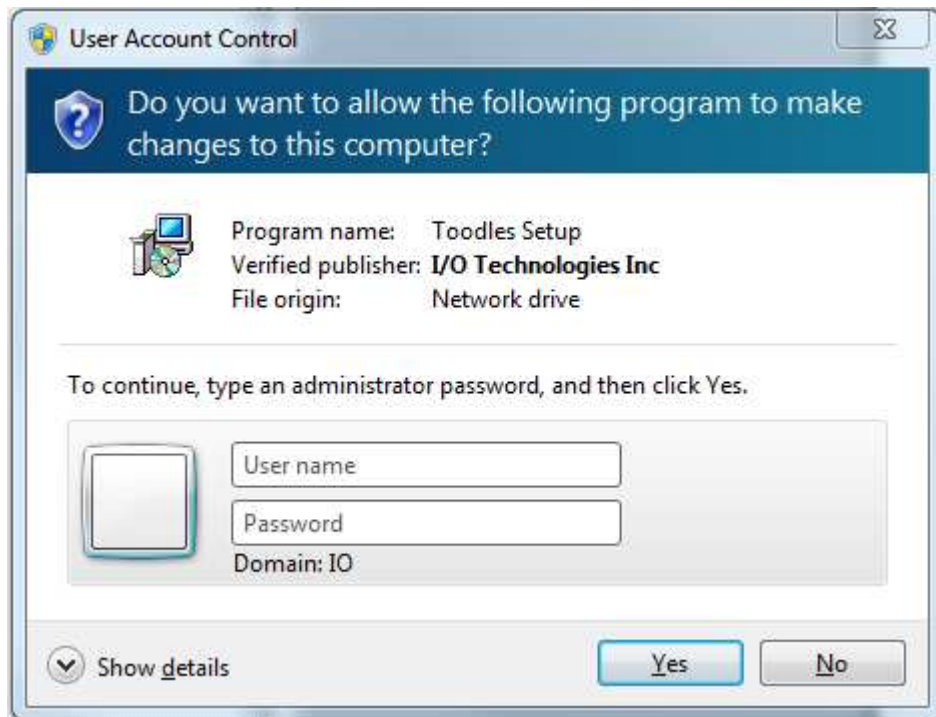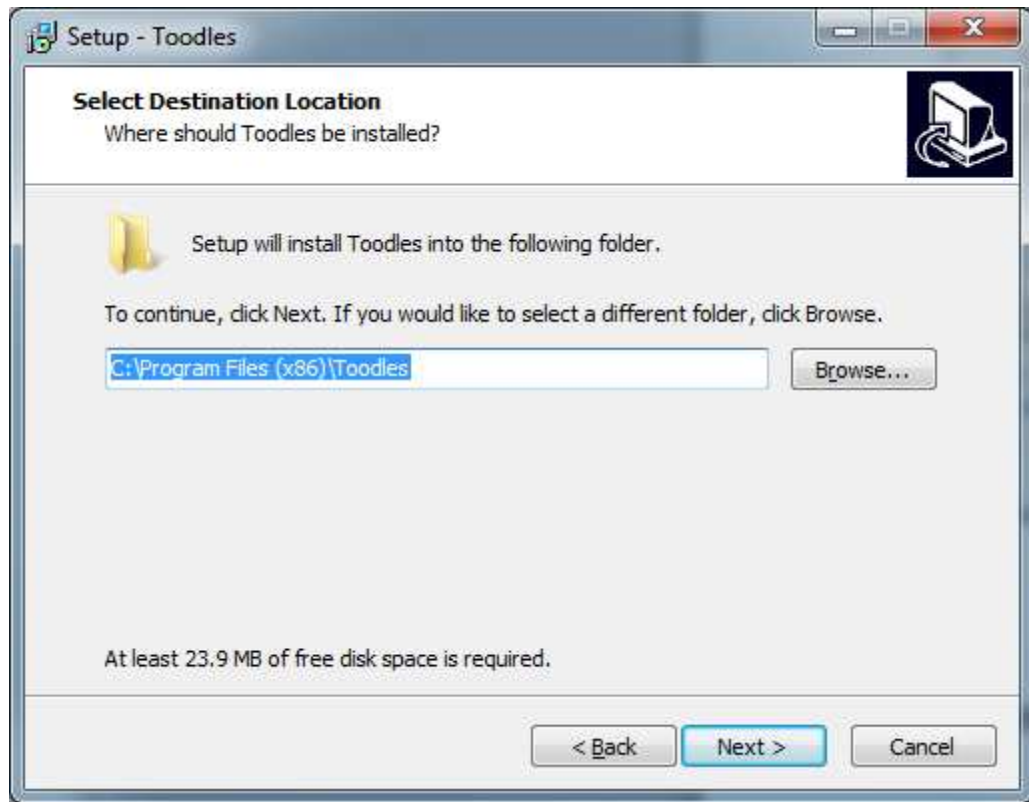- If you will be installing this on a laptop or single workstation, please follow the instructions in the

**Installing Toodles! on a standalone workstation** Section of this document

Note that while you *can* press the browse button in order to navigate to a desired folder, be sure to translate the selected path into a Univeral Naming Convention (UNC), so users will be able to access the application from workstations across the network.

For example, rather than specifying   D:\apps\toodles, you'll need to specify \\OurServer\apps\toodles here (replace OurServer with whatever your server name happens to be).

(If you fail to specify a UNC, the application will install just fine, but when users attempt to launch the software, their workstation will attempt to find the d:\apps\toodles folder locally, and fail.)

Here's an example of how this might look in a live environment:
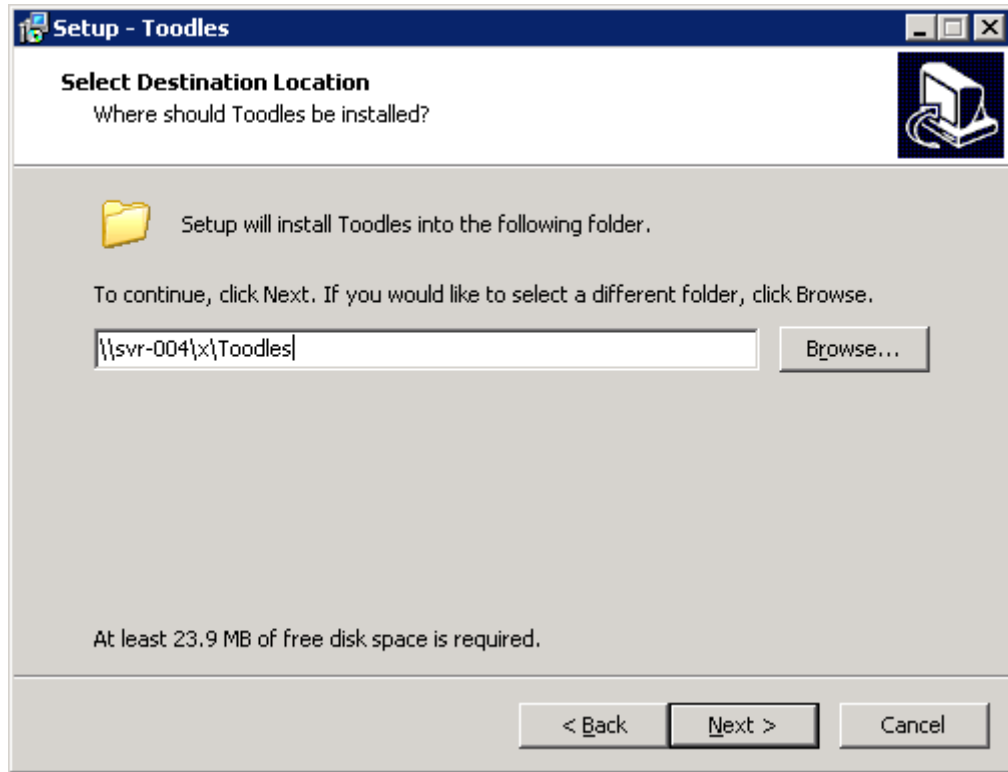
Press Next to continue.

The installer will automatically create a desktop shortcut, as well as create a shortcut in the server's start menu. By default, it will create shortcuts in a new Toodles! folder in the start menu. If desired, you can specify a different folder by pressing the browse button.
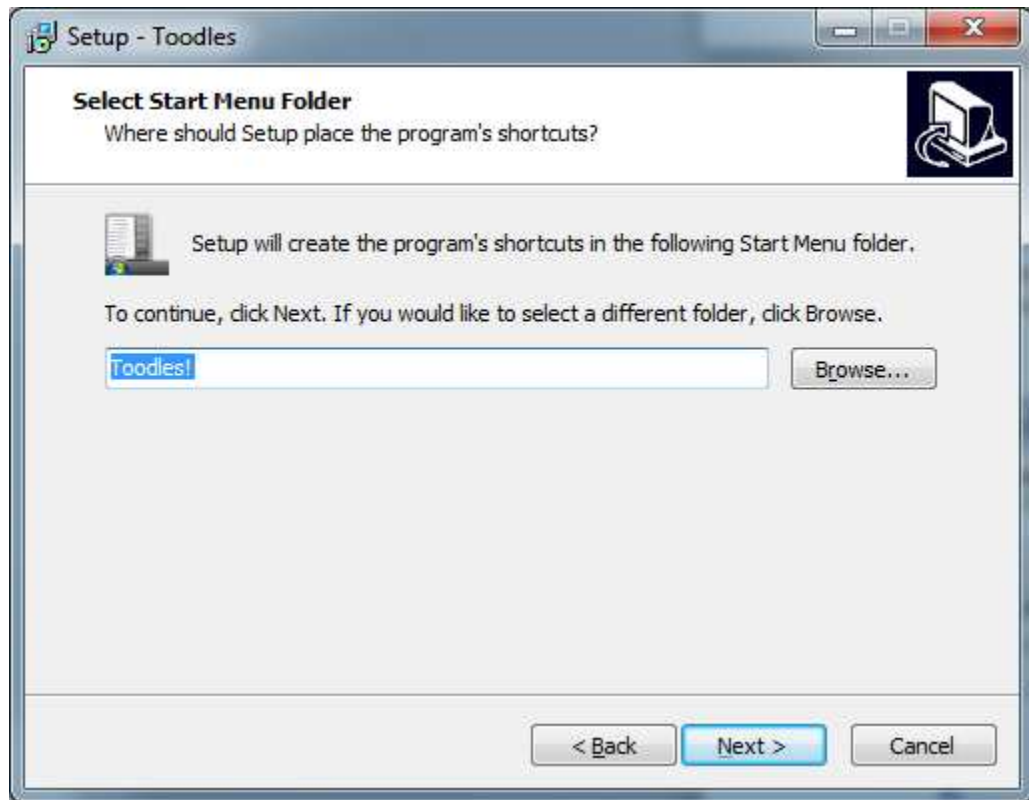
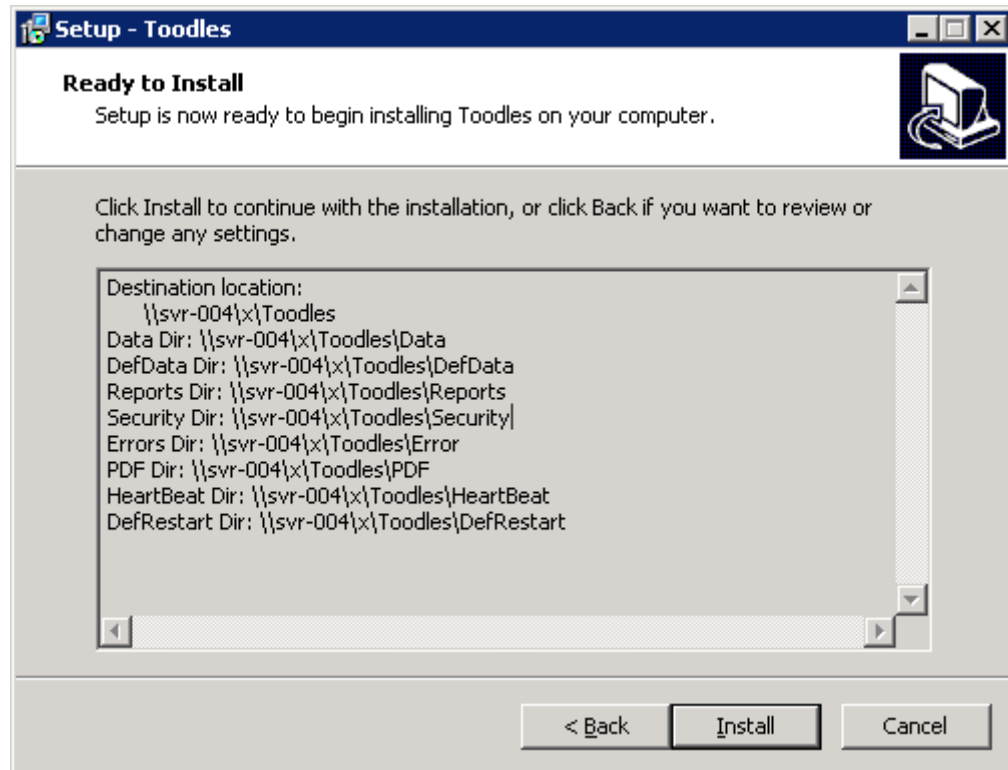Press Next to continue.

The installer will display a list of folders that will be created.

Press the Install button to continue.

The installer will now create the necessary folders and files. When it has finished, the following dialog will appear.

Press the Finish button to complete the installation.

Launch Toodles! using the shortcut that was created on the server's desktop and register the application on the server.

On workstations connected to the server…

Note: It is **not** necessary to run the installation program (ToodlesSetup.exe) on the workstations!

All you need to do is set up a shortcut that points to the launcher that was installed on the server during the previous steps.

Navigate to the folder where the application was installed (for example, if you elected to install to h:\apps\toodles, you would navigate to h:\apps\toodles.

You'll see a shortcut in the folder. In the screenshot below, it's the first red icon with the caption Toodles!.
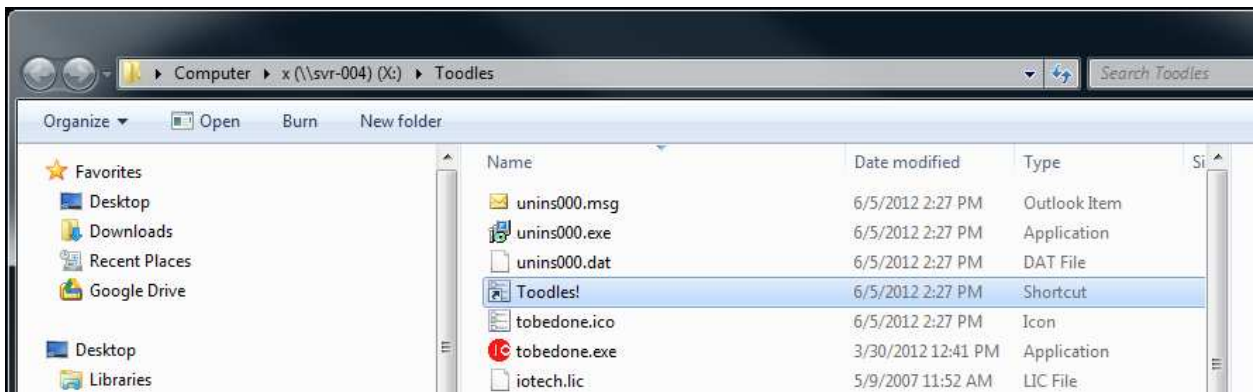
Copy the shortcut to the local workstation's desktop.

When users double-click the shortcut, the launcher will automatically install the application the desktop, using the database tables on the network server.

DATA ENTRY

Upon launching the ToBeDone application, the detailed Task Description input screen will appear.
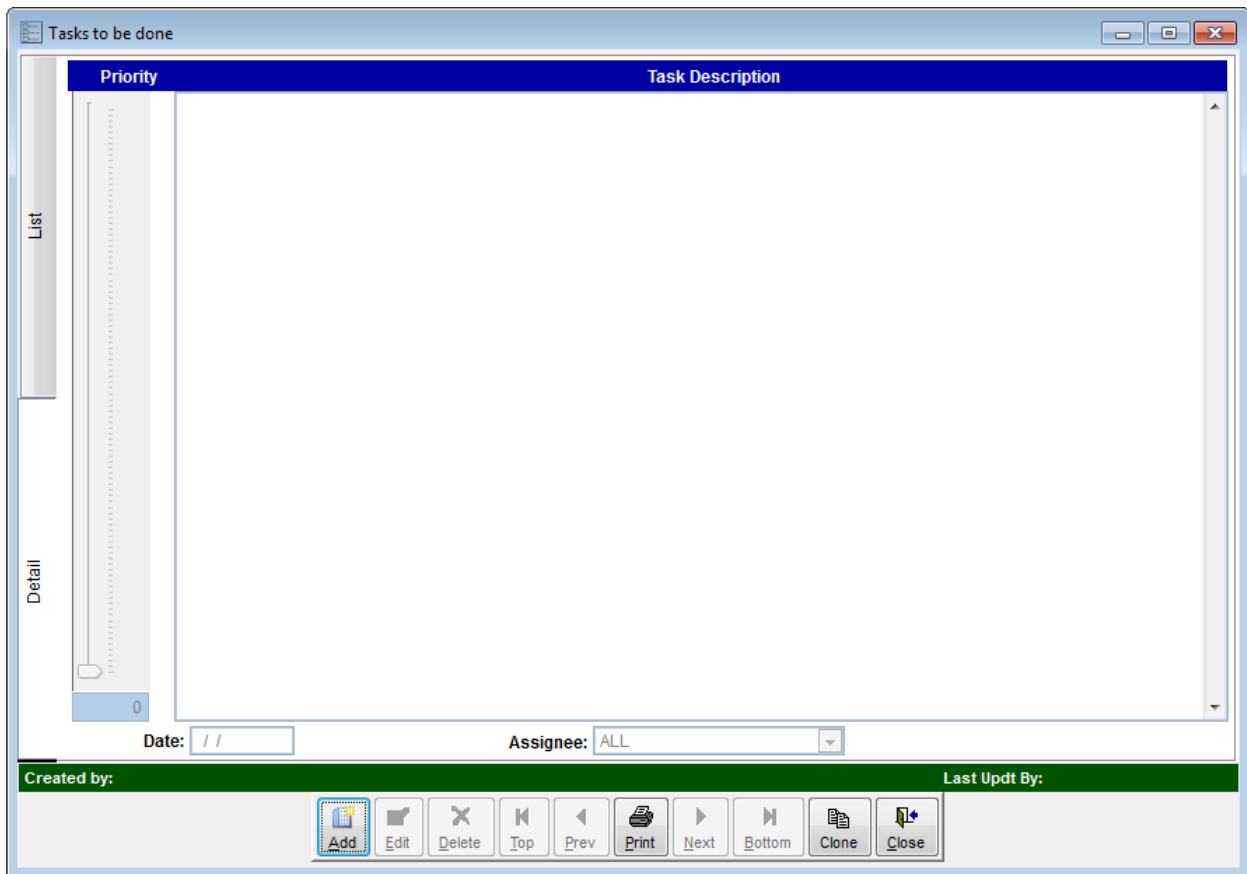
From this screen tasks may be added by clicking on the "add" button on bottom, clicking in the large box under "task description" and typing the task in the window.
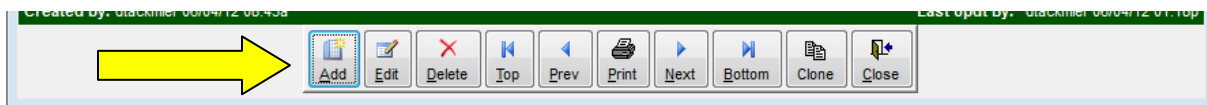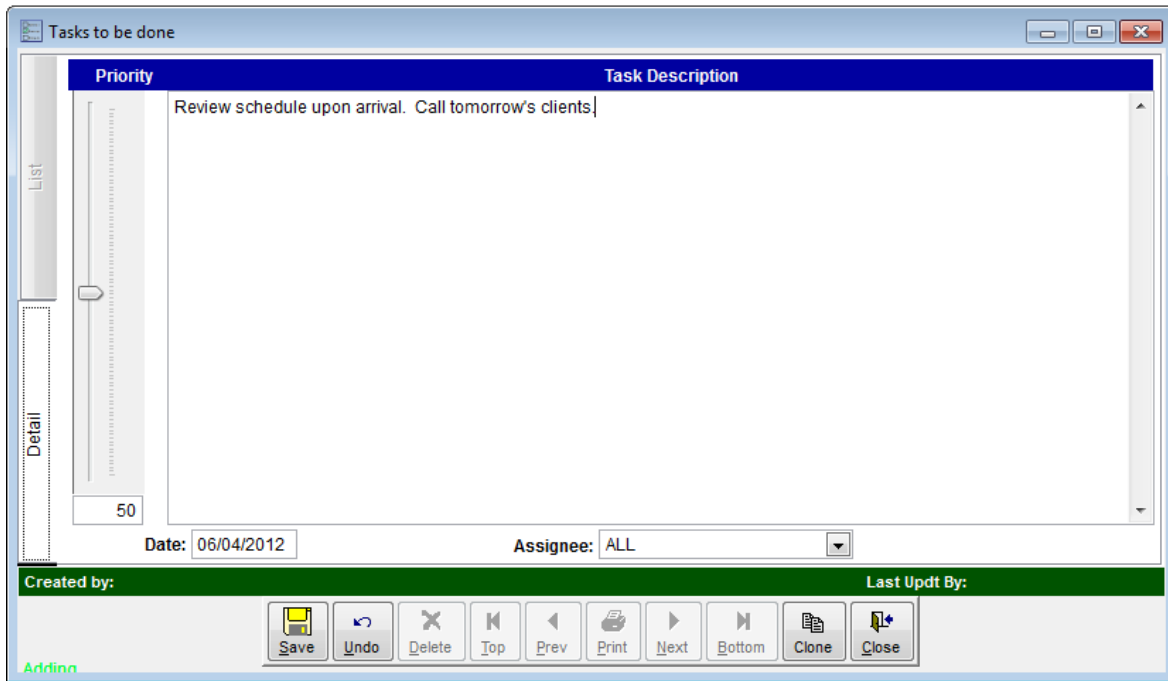
While still in edit mode, type the appropriate date for the task in the date field. If the task is being assigned to a specific person, click on the down arrow under "assignee" and highlight the appropriate person. Save the task by clicking the "save" button on bottom.
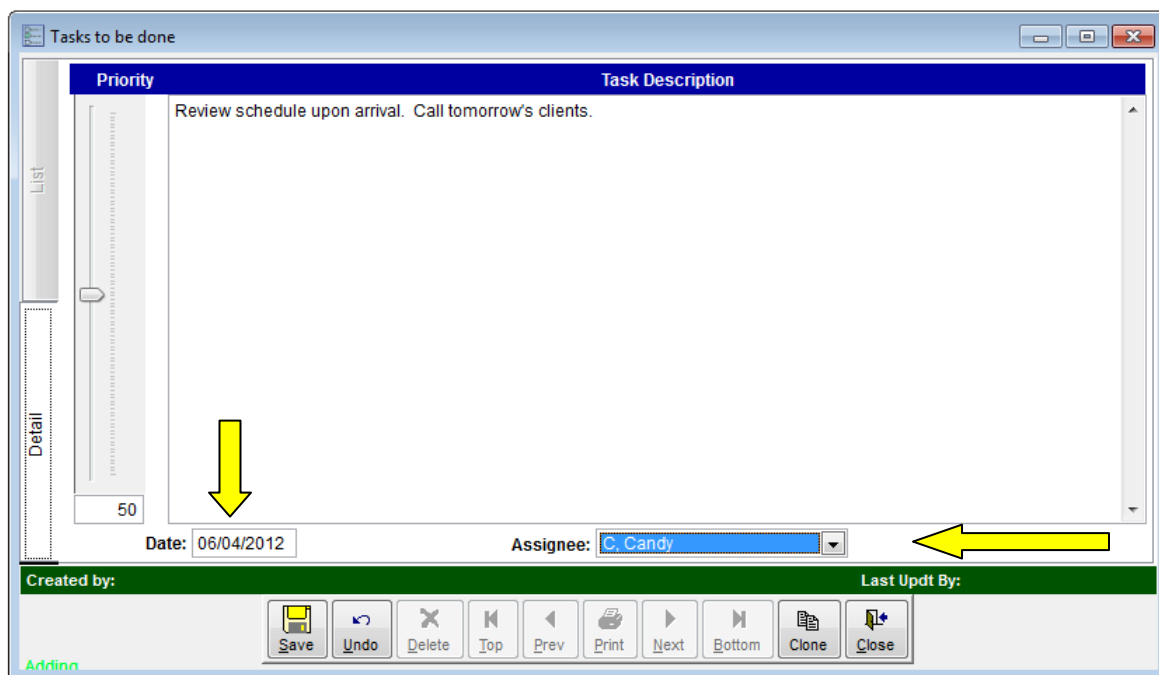
To see all tasks, click on the "list" tab on the left. Scroll up and down to see tasks for a specific date.

PRINTING TASK LISTS

To print a task list for a specific assignee on the current day, choose "print" at the bottom, double click on "all", and then double click the appropriate assignee.

entals   Debbie
w's customers to remind them we're coming.   Paul
vork backups.   Paul
process inbound mail. Reconcile any bank statements immed   ALL
schedule I/O cleani   Debbie
, who wanted to ge   Debbie
o see if he would h   Debbie

Select Assignee(s) / Checklist Date

Select All   **Check List Date:** 06/05/2012

Assignees
, Abner
, Debbie
, Martha
, Paul

(Double-click a row to select or de-select)

0 rows selected

OK   Cancel

Last Up

Add   Edit   Delete   Top   Prev   Print   Next   Bottom   Clone   Close
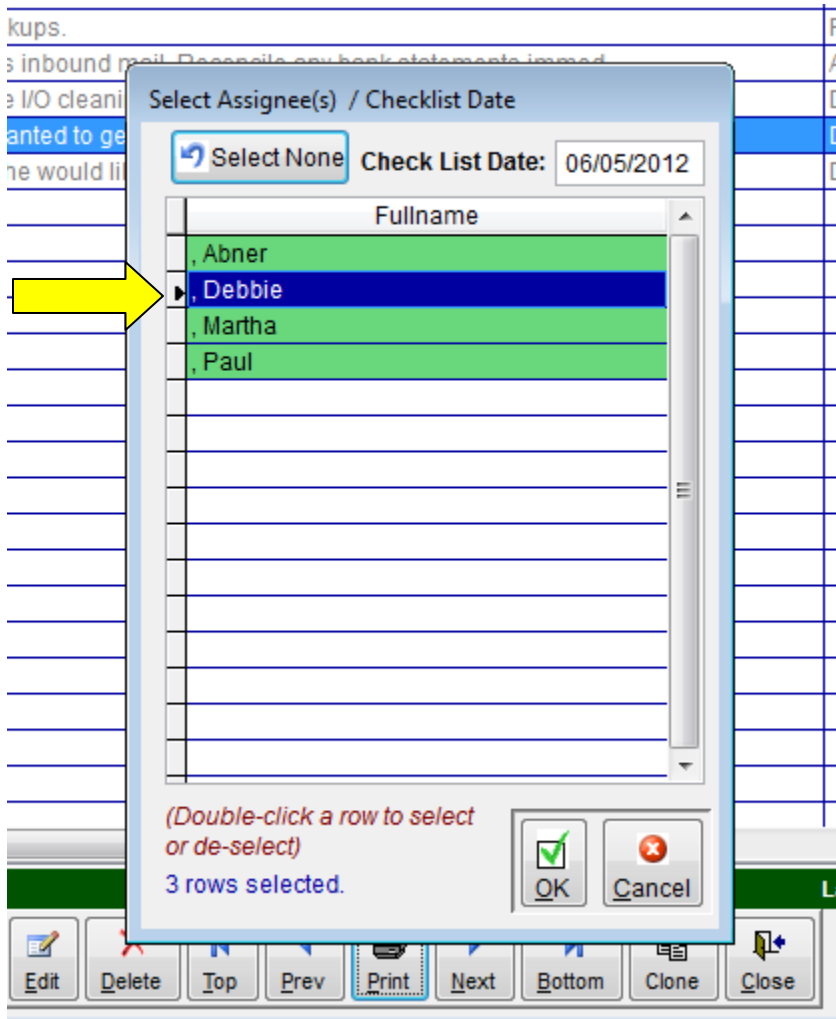
Click on "OK".

The checklist will pop up, with a print box which you can select for printing or previewing.
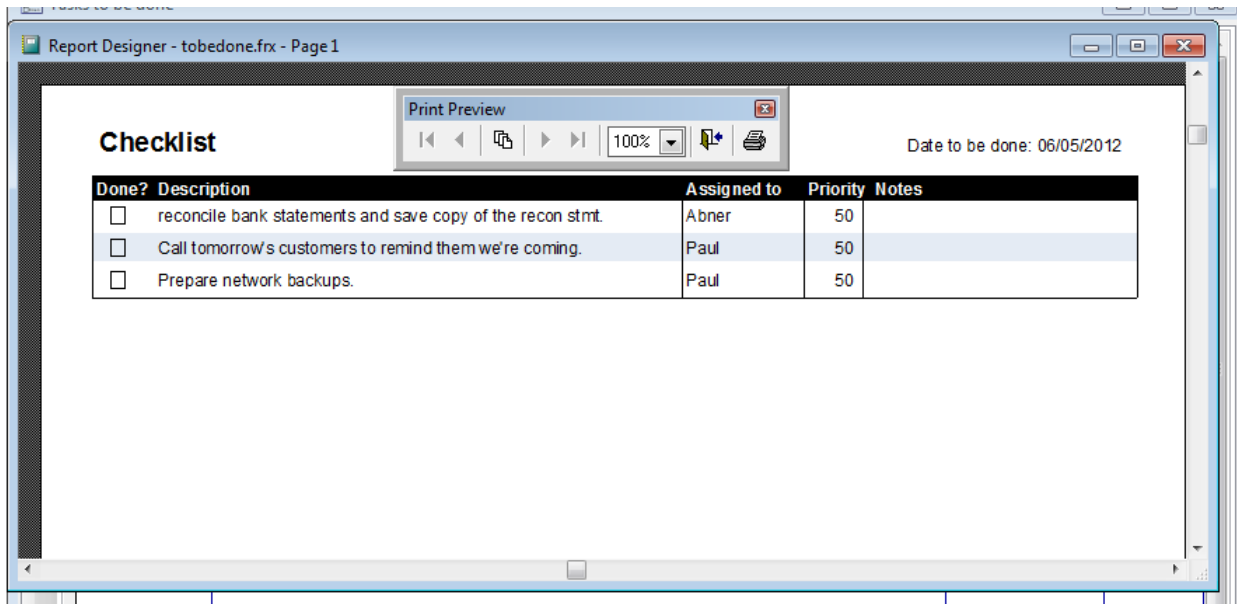
Number of backups to retain – Each time you perform a backup, a new file will be saved to the backup folder. You can choose to set this number very high (the maximum value is 2,147,483,647). Otherwise, if you want to conserve disk space on your network, set this to a lower number. The default value is 5. In other words, after you've created five backups, VBS Registrar will automatically delete the oldest backup file, so that the five most recent backups are available in the backup folder.

[ ] Child's Religious Affiliation. If you want to keep track of students' religious background, check this box. A Default Religion dropdown will appear. Use this dropdown to identify the most likely religion of the majority of your VBS students. This can be overridden for each student, but setting a value here will make data entry easier when registering new students.

[] Child's Baptism Status – if your church wants to track whether students have been baptized or not, check this box. A corresponding checkbox will then appear on the student data entry form.

[] Extra Services – If your church offers daycare before or after VBS or offers breakfast or lunch, check this box, and a section will be added to the student data entry form which will allow you to enter this information for each student.

[] Bus transport needed. If this box is checked, a checkbox will appear on the student information screen to track whether the student needs bus transportation. The Bus Riders report will display any students where this box has been checked.

[] Photo on File. If this box is checked here, a check box will appear on the student information screen, allowing you to track whether a photograph of the student is on file.

ADDITIONAL CONFIGURATION SCREENS

To make data entry as quick and easy as possible, there are a number of dropdown boxes on the main student information form. Since no two churches are the same, you'll want to update the values that appear in these dropdowns so that they correspond to your VBS's circumstances.

The followings screens will allow you to manage the values that users can select during data entry:

CLASS ASSIGNMENT DESCRIPTIONS
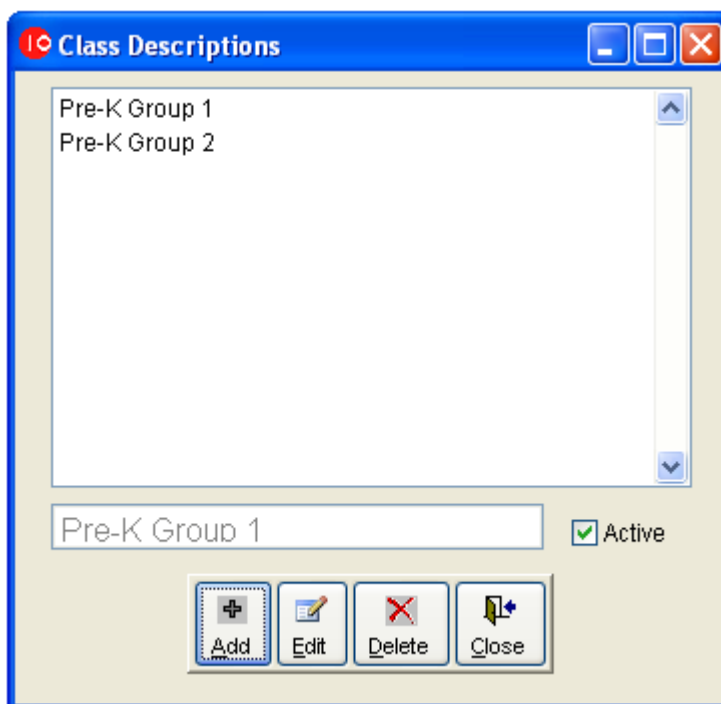
To edit an existing record, click on the item and press the Edit button. To add a new item, press the Add button, enter the value and press the Save button.

Depending on how many students will be enrolled in your VBS, you may have multiple classes for each grade level. Or you may group multiple grade levels into one class. This form allows you to manage this grouping of students. The class roster report will use these groupings to generate class rosters, one per group.

For example, if your church plans to enroll approximately 150 students this year, broken out into fifteen groups of ten students each, you would want to list each class in the Class Descriptions screen, so that students can be assigned to the appropriate class.

Another example: if your church is in a rural area and you only plan to enroll thirty students, you might only have staffing for four classes. So you would use this screen to list each of the classes.

We've provided a couple of "starter records". To delete them and start over, highlight each class with your mouse and press the Delete button. Or, to override the descriptions, press the Edit button and change the description as applicable. To add additional records, press the Add button.

GRADE LEVEL MAINTENANCE FORM
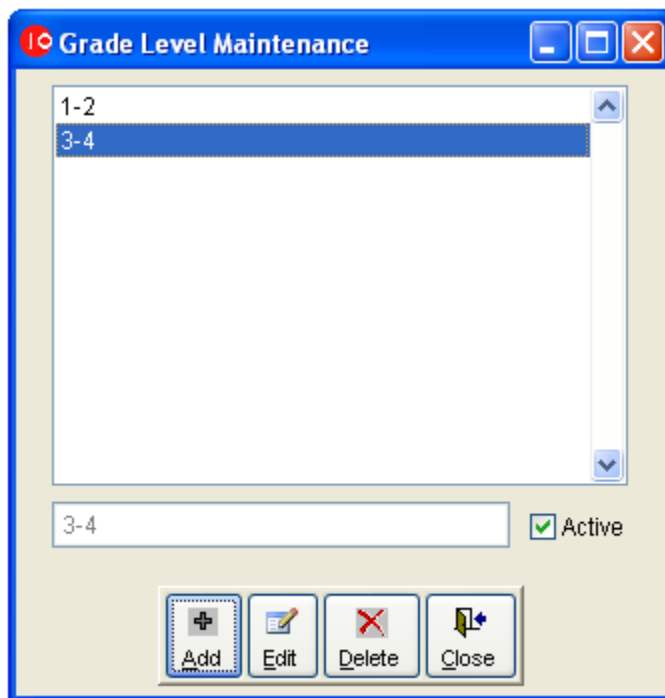
The grade level maintenance form allows you to identify the current grade levels of your students. The form above allows you to break grade levels out in any manner that makes the most sense to your congregation. (Currently the field in the student information screen is more for informational purposes, and doesn't drive the criteria of any reports.) To edit an existing record, click on the item and press the Edit button. To add a new item, press the Add button, enter the value and press the Save button.

RELIGION MAINTENANCE FORM
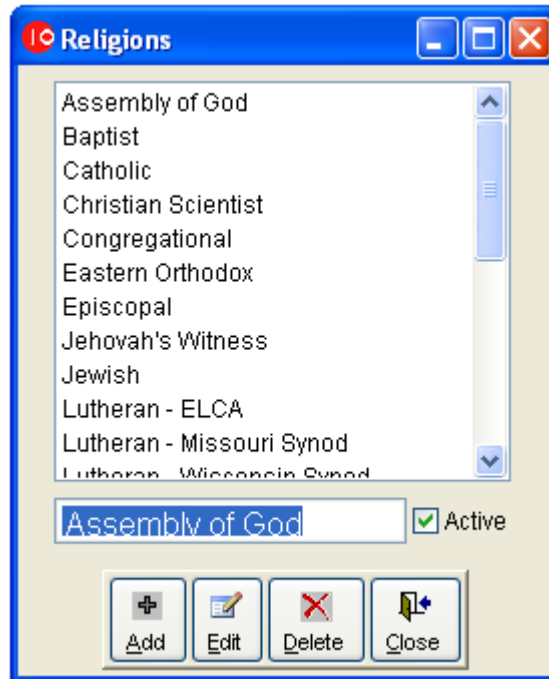
If your church wants to track the religious denomination of your students, this form allows you to add or edit the list of religions that appears on the student information form. To edit an existing record, click on the item and press the Edit button. To add a new item, press the Add button, enter the value and press the Save button.

GRADE COMPLETED FORM
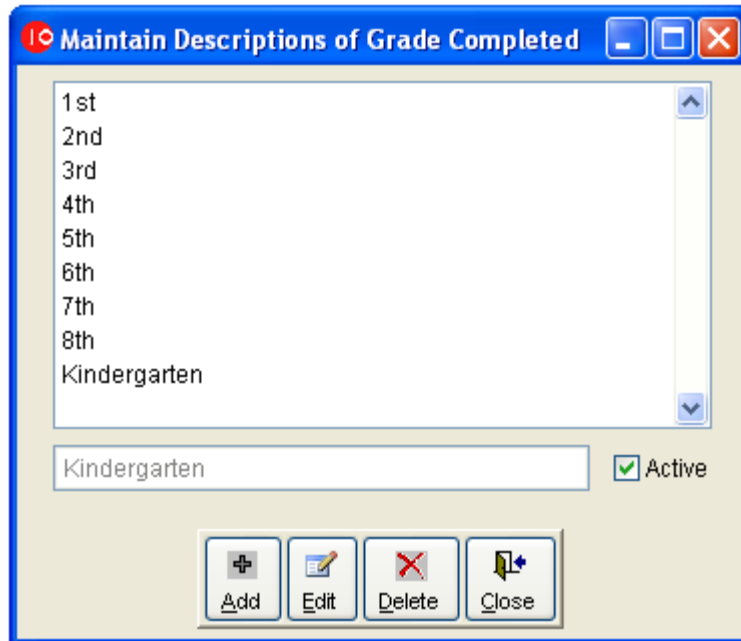
Most churches won't need to change the values that appear in this form. However, if you're using the Import feature to import records from a comma-separated file, you may need to change the values here to correspond with the values used in your CSV file.

To edit an existing record, click on the item and press the Edit button. To add a new item, press the Add button, enter the value and press the Save button.

These values appear on the Grade Completed dropdown of the student information form.

EMERGENCY CONTACT RELATIONSHIP FORM
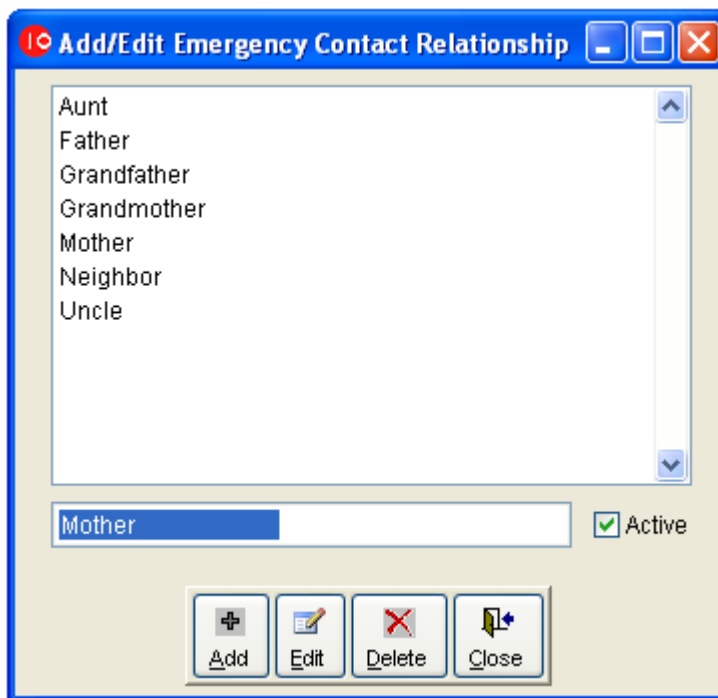
This form manages the data that appears in the Emergency Contact Relationship dropdown on the student information form.

To edit an existing record, click on the item and press the Edit button. To add a new item, press the Add button, enter the value and press the Save button.

When specifying the emergency contact for your students, you may need to augment the list above to accommodate other relationships.

REFERRAL SOURCE MAINTENANCE SCREEN
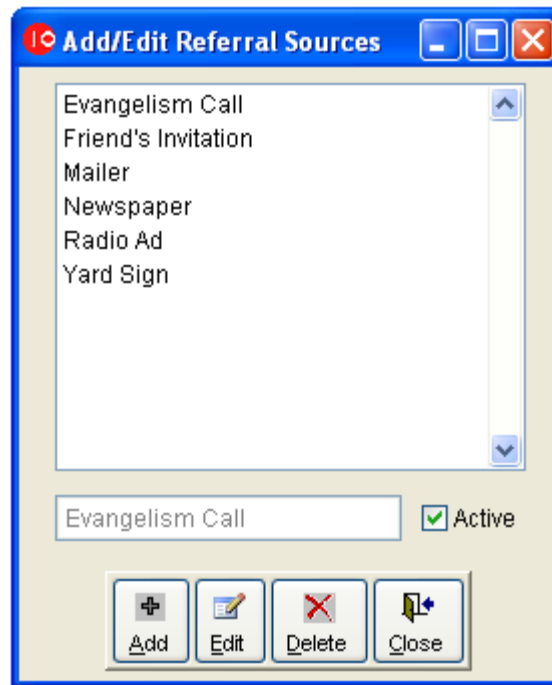
Use this form to add/edit values that appear in the Referral Source dropdown on the student information form.

To edit an existing record, click on the item and press the Edit button. To add a new item, press the Add button, enter the value and press the Save button.

DATA ENTRY

ADD/EDIT STUDENTS

After you've configured the system, this screen will auto-launch when you first start the application. You can also launch it by choosing Students… Add/Change from the main menu.

This is the primary data entry screen, which you'll use to enter students as they register. The current registration year will appear in the green box at the top right of the screen. This is based on the VBS Start date which was entered in the VBS Information Screen.

When you press the Add or Edit buttons, the captions on the buttons will change so that Add becomes Save, and Edit becomes Undo.

As you enter new student records into the database, their first and last names will be added to the list on the left side of the screen. You can sort that list by last or first name by clicking on the column headers. Click on a record in the list on the left, and the child's information will appear in the detail fields on the right side of the screen.

Most of the above fields are self-explanatory. But note the following:

> The student's age will be automatically calculated and refreshed, based on his/her date of birth.

> If you checked the Extra Services option on the VBS Information maintenance screen, the Extra Services box will appear on this form. It is designed to help track which students will be in need of extra services your congregation offers in conjunction with VBS. Many churches offer before-and-after child care. Some offer breakfast and/or lunch. If you check the Child Care checkbox, you'll be able to enter the start and stop time for child care services. Check Breakfast and/or Lunch if your church will be providing these meals to the student.

> The Religion dropdown is defaulted with the value that was entered in the VBS Information screen. You can override it here for each student.

> When you press the Notes button, a popup window will appear which will allow you to enter free-form notes about the student.   A quick indicator of whether notes have already been entered: the Notes caption will appear in bold blue font.

Notes - Jeanie Anderson

This is a note for Jeanie Anderson. It will print on the individual student report and the class roster.

Undo   Save   Close
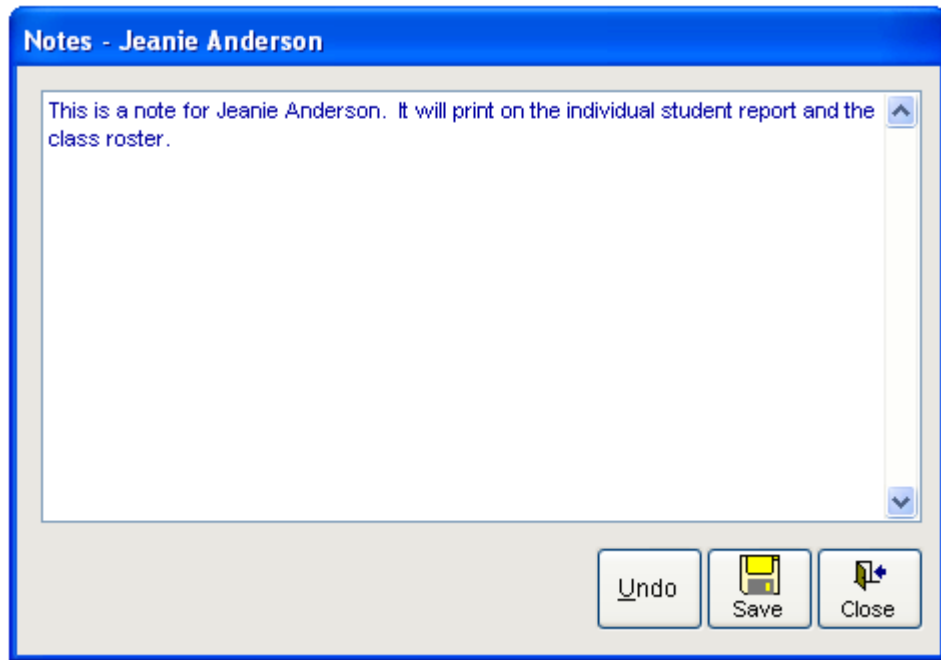
When you press the Attendance button, you'll be able to log attendance for each of the days of the VBS program, using the following popup:
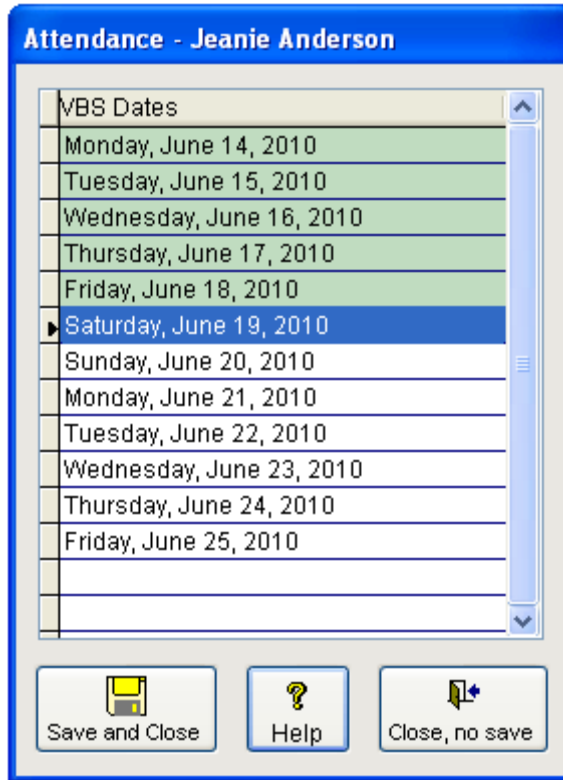
The list of dates that appears on the screen is based on the date range specified in the VBS Information screen. To log a student as present on a given day, double-click the date. To un-mark, double-click again.

System Maintenance

Back up data files

If your application was installed in a network environment which is fully backed up on a regular basis, you don't necessarily need to use this functionality. However, we recommend making periodic separate backups anyway—just in case. If you're of the mindset that backups really aren't necessary, fine.   Just be warned that while we can fix issues with the application, we can't retrieve lost data. **All** hard drives crash—eventually. It's just a question of when it will happen.

To back up your data files, select this option from the main menu. To specify the target folder where your backups will be created, use the Maintenance … VBS Information screen. We'd recommend saving the backup to a detachable hard drive or USB drive, so that you're able to take a backup off site periodically. During backup, the following dialog will be displayed:
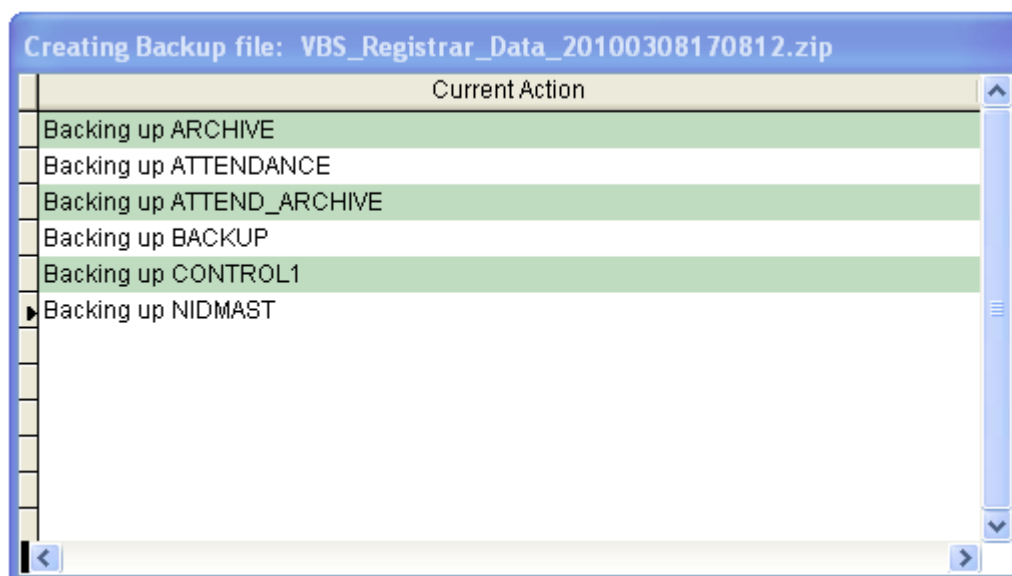
Backups are stored in .Zip format to save space. They can be opened using file compression applications such as WinZip as well as recent Windows operating systems, such as XP, Vista and Windows 7.

RECONDITION DATABASE

To keep your application running at top speed, it's a good idea to recondition the database tables at least once per year. Run this functionality at the beginning of a new year, after archiving old records. When you do, you'll see the following message:
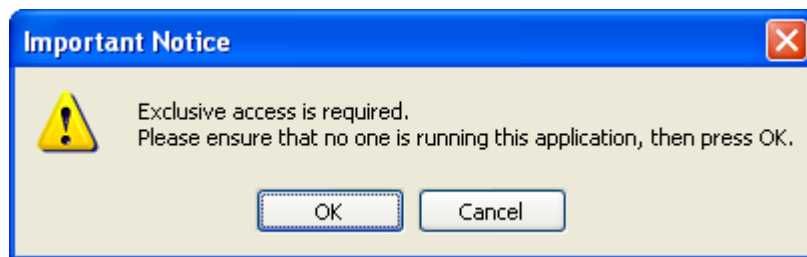
After you've ensured that no one else is running the application on any other computers, press the OK button. You'll see a status box like this:
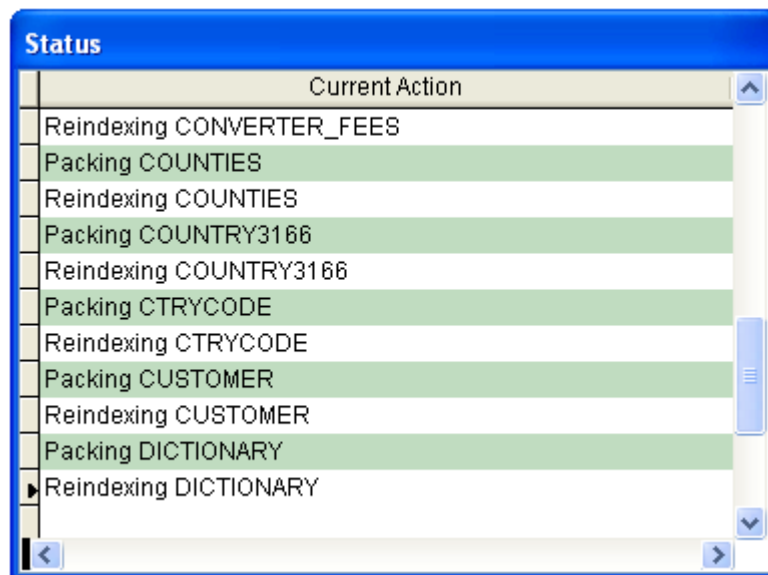
When the processes have all completed, you'll see the following dialog:

IMPORT STUDENT RECORDS

This menu option allows you to import student records entered on a web site or separate system. Currently the system allows importing of a comma-separated values (CSV) file having the following format:

Column	Description	Data Type	Width	Notes
1	Unique ID#	Integer	7	This column is not retained inside VBS Registrar, but is useful to determine whether to import a record or not. For any row headers or other records you prefer not to import, set the value of this column to 0 (zero).
2	Date Added	DateTime	8	Date/time the record was added to your external system.
3	First Name	Character	20	Student's first name
4	Last Name	Character	20	Student's last name
5	Keep student with	Character	30	If student should be kept in the same class with another student, specify the other student's name here.
6	Address1	Character	50	Student's street address
7	Address2	Character	50	Apartment number, PO Box number, etc.
8	City	Character	30	Student's city
9	State – Full	Character	20	State spelled out – for example: "Texas", "Washington"
10	Zip code	Character	10	If using Zip+4, you can either leave the hyphen in, or remove it.
11	Student's DOB	Date	8	Format: MM/DD/YYYY

Column	Description	Data Type	Width	Notes
12	Student's Age / Filler	Integer	3	VBS Registrar calculates the student's age automatically, so this column is not actually imported. If not specified, default to 0.
13	Grade Completed	Character	15	The value specified in this column must match up with the values entered in the Grade Completed form found in the Maintenance menu. Default values are "Kindergarten", "1st", "2nd", etc. If your external system uses different values, be sure to update them in the Grade Completed form before running the import.
14	Parent First Name	Character	20	VBS Registrar allows you to specify separate mother and father names. Most external systems do not. The value entered into this column will be imported into the Mother's first name field inside VBS Registrar.
15	Parent Last Name	Character	20	The value entered into this column will be imported into the Mother's last name field inside VBS Registrar.
16	Home Phone	Character	20	Home phone number. The import process will strip out hyphens, parentheses and spaces, resulting in a standard format inside VBS Registrar.
17	Emergency Contact Phone	Character	20	The import process will strip out hyphens, parentheses and spaces, resulting in a standard format inside VBS Registrar.

| Column	Description	Data Type	Width	Notes
18	Allergies/Medical conditions	Character	50	
19	Attends church?	Character	3	Values: "Yes " or "No"
20	Church Name	Character	50	Student's home congregation.

EXPORT STUDENT RECORDS

Use this function if you'd like to export student records to another system. For example, if you want to generate custom letters using Word Mail Merge, you could export the data to an Excel spreadsheet and generate a mail merge from the Excel spreadsheet. You'll be asked whether you wish to export only Prospect records. This can be useful, if you're going to be doing follow up work with prospects and don't wish to export student records for current members of your congregation.

You'll be prompted for a path and filename where you'd like to save the export file. The application will suggest students.xls or students.csv, but you can override the name to whatever is memorable. Once you've done so, press Save to create the export file.

CHECK FOR UPDATES
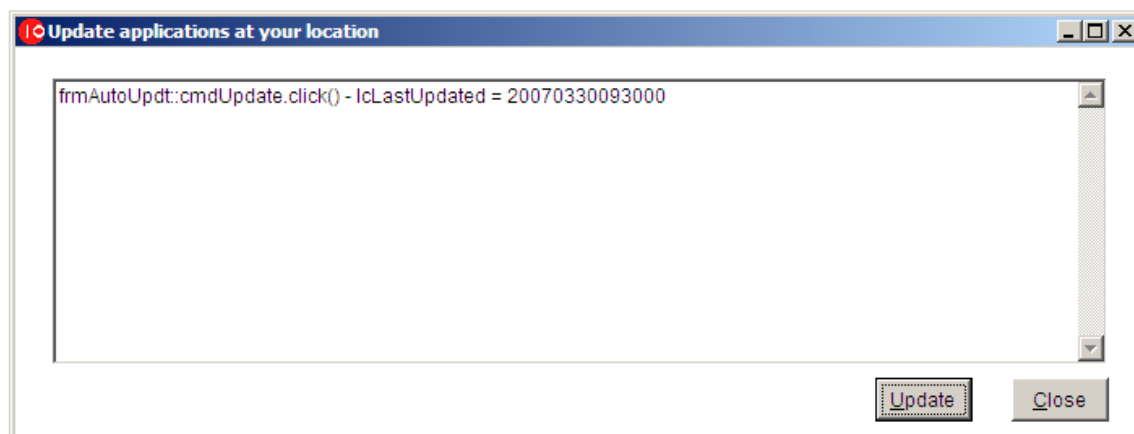
I/O Technologies, Inc may provide periodic updates to the software under the current version number. Use this functionality to check for new updates.

Note: there are two basic requirements that must be met in order for this feature to work properly:

1) your computer must be connected to the internet

2) your firewall must not block FTP traffic.

If you're not familiar with these terms, don't worry. Just try using the screen. If your Windows Firewall displays a message indicating that this application is attempting to connect to an FTP site, press the "I know what I'm doing—go ahead and let me do this" button (actual button captions may vary). Once you've done so, you'll see a list of messages scroll by in the window above. Depending on whether updates are available or not, the messages will vary.

If you receive a message that the application was unable to connect to the FTP server, please double-check your internet connection, and then ensure that your firewall allows FTP traffic.

If an update is found, it will be installed automatically. All you need to do in order to take advantage of it is exit the software. The new updates will be available when you launch it again next time.

HELP … ABOUT

Choose this option to view the current version date and time stamp, as well as hyperlinks to our web site and email address. Please email all suggestions and enhancement requests to this email address.