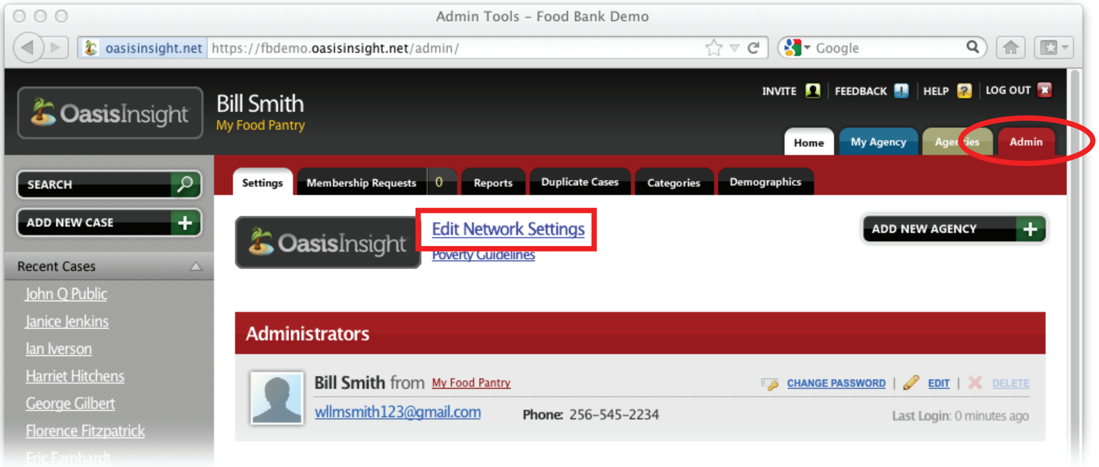
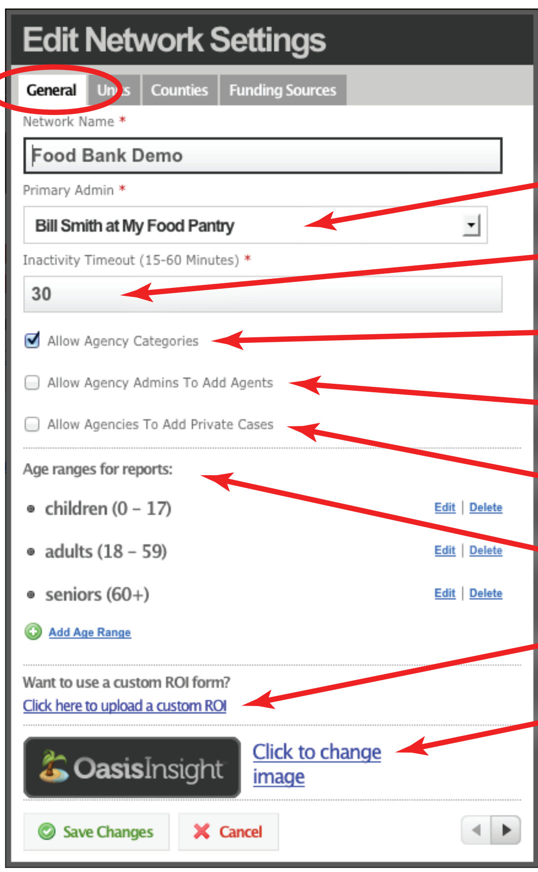
OasisInsight™

ADMIN Section

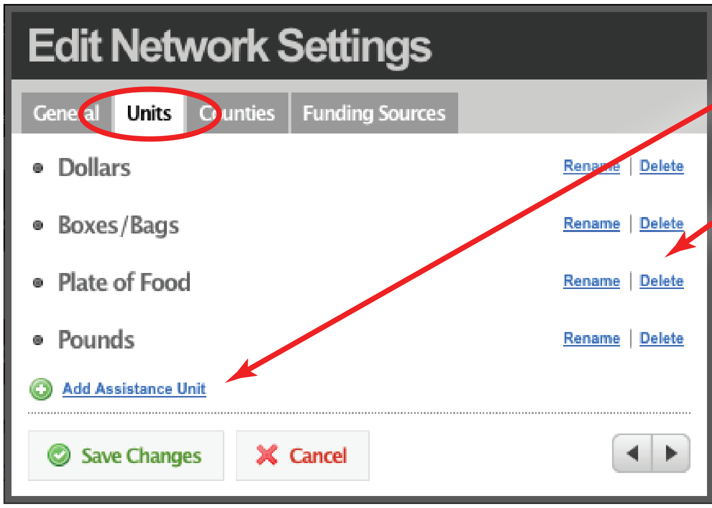


The **Admin Tab** is where you keep track of your Oasis network. Let's start with the Settings sub-tab (displayed in the image above). When you will click the Edit Network Settings link (in the red square), the following window will open.



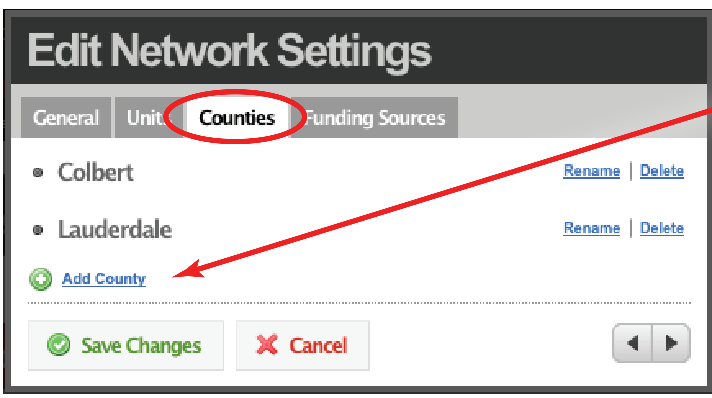
The Edit Network Settings window has four sections: General, Units, Counties, and Funding Sources. We'll start with the General Tab.

- You define the primary administrator for your Oasis network here
- Oasis will automatically log out after the number of minutes entered here.
- Checking this box will allow Agency Administrators to create assistance categories for their agency.
- Checking this box will allow Agency Administrators to add agents to their agency.
- Checking this box will allow agencies to make private cases for their agency.
- Here is where you set the age ranges you need for running age-based reports.
- You can click this link to upload your own Release of Information form.
- And you can click this link to upload your logo to Oasis.



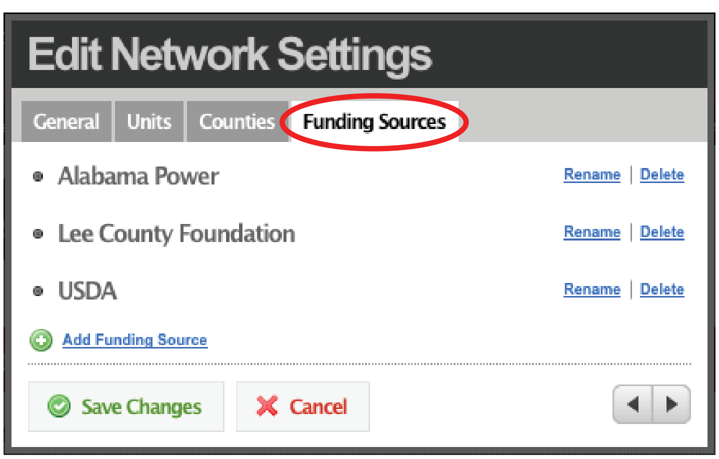
The Units section of the Network Settings window allows you to add custom units for your assistance records. You click the Add Assistance Unit link to add your units.

You can also rename or delete units if you need.



The Counties section of the Network Settings window allows you to define the counties your network serves. You can add as many counties as you need. Just click the Add County link and enter your counties.

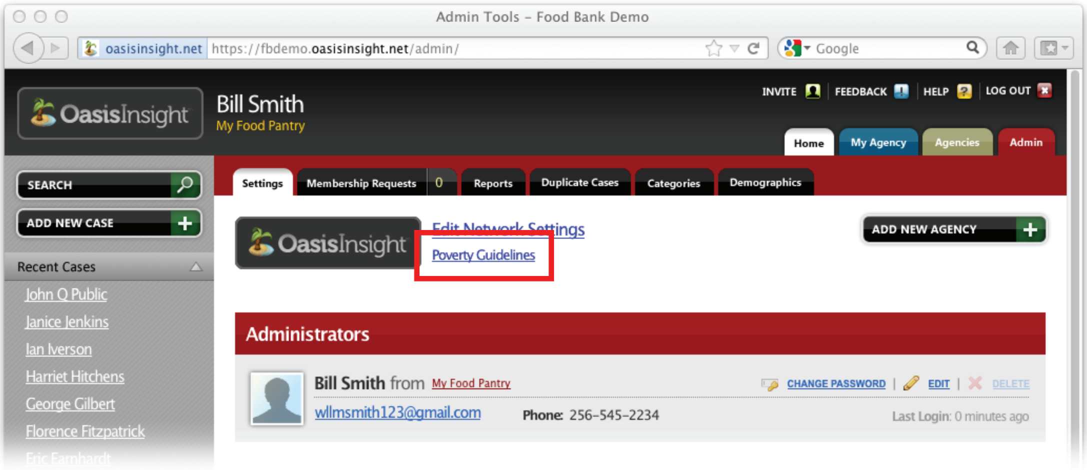
Again, you can rename or delete counties if you need to.



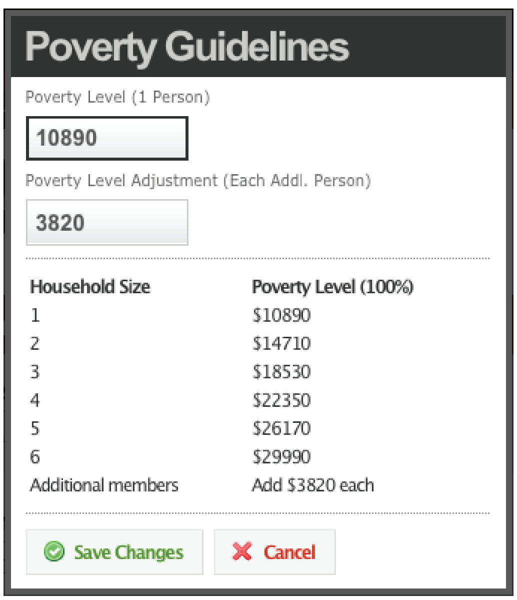
The Funding Sources section allows you to add funding sources for assistance records.

To add a funding source, click the Add Funding Source link and enter the name of the source.

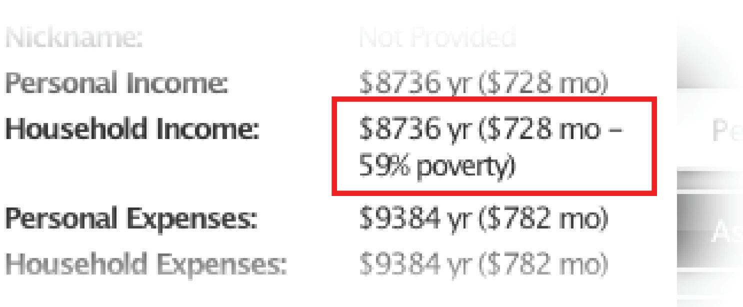
Tip: *You don't need to click the Save Changes button after each section. You can make changes in each section and click the Save Changes button when you are done.*



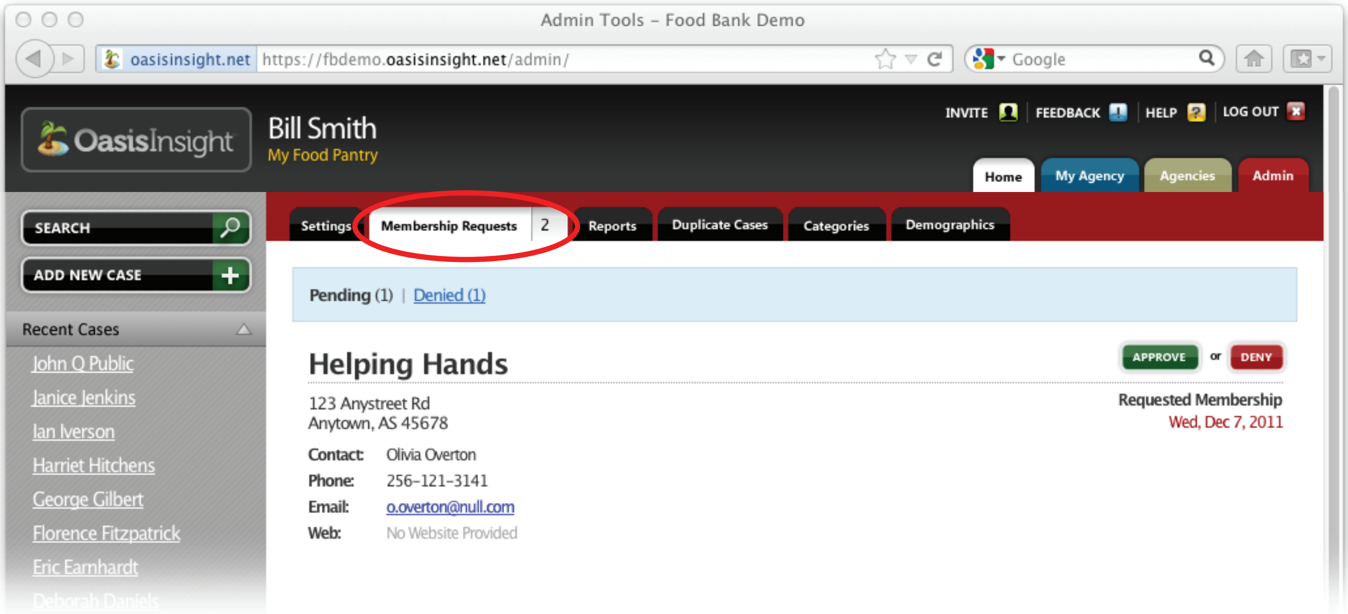
The Poverty Guidelines feature allows you to define guidelines for your network. When a you add income information for a client, that information will be compared to the poverty guidelines you set and will give you that client's percentage of poverty.



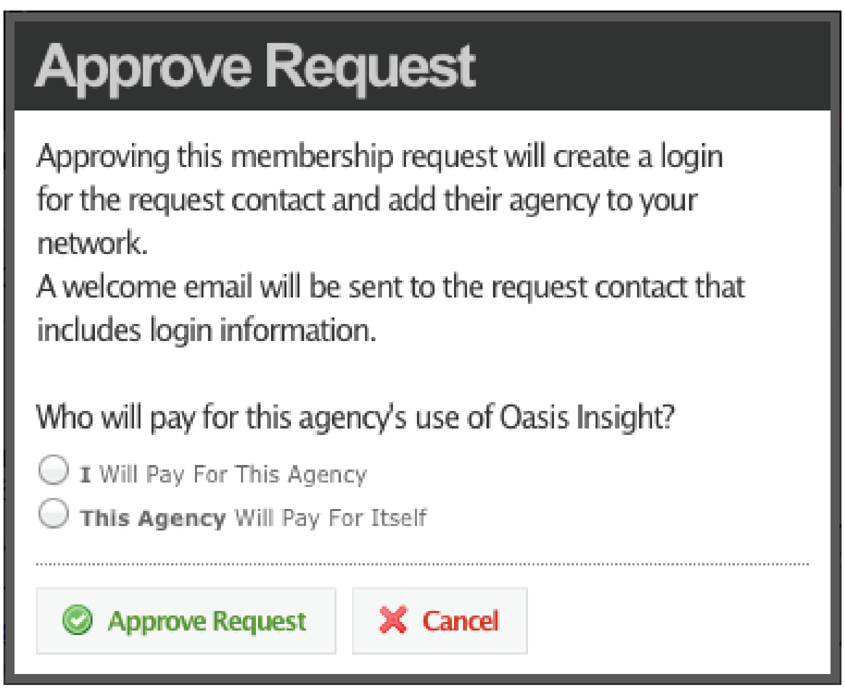
When you click the Poverty Guidelines link, a window will open where you can set the poverty level for one person. You also set the povery level adjustment for each additional person.



You can see that when the poverty level is $10,890, and a client has a household income of $8736, their poverty percentage is 59%.

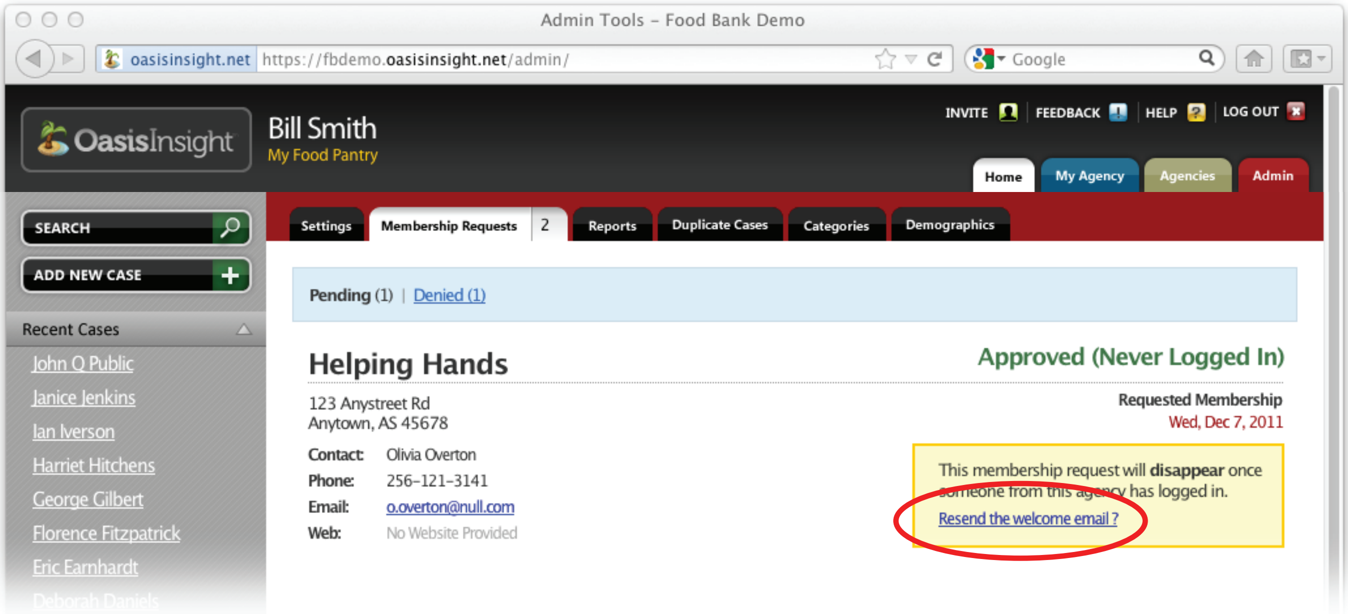


The Membership Requests sub-tab has two sections, one for Pending membership requests and one for Denied membership requests. When someone asks to join to your Oasis network, their request appears in the Pending section (shown above). If you click the Approve button, the following window will open.

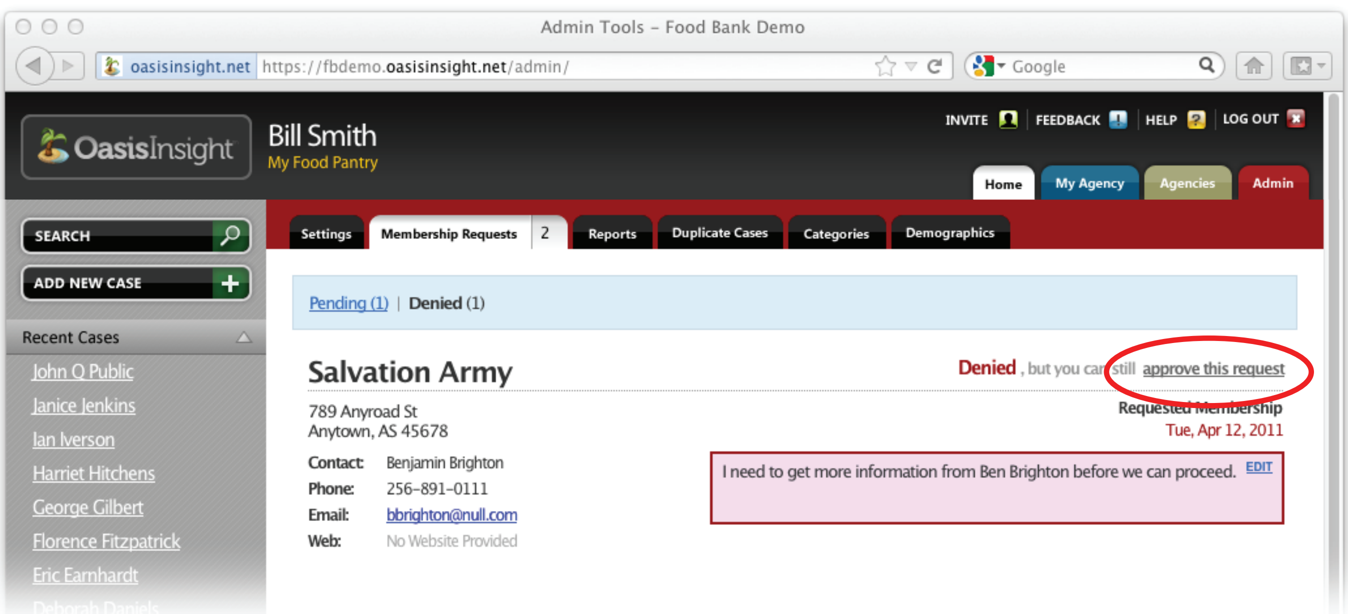


When you approve a membership request, Oasis will ask you who is planning to pay for the service.

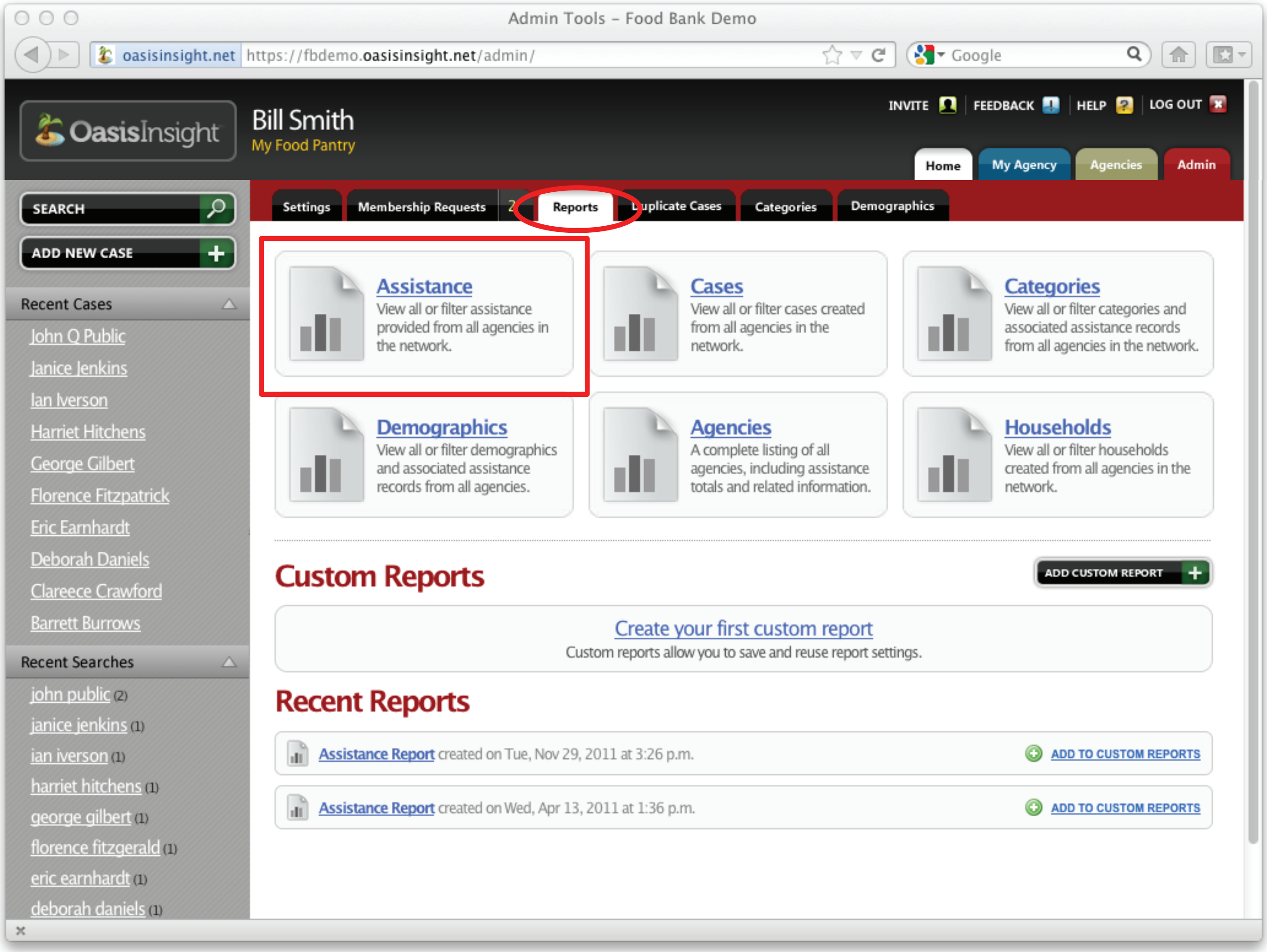
If you select "This Agency Will Pay For Itself," the agency will receive an email with billing information.



After you approve the agency, they will get an automatic welcome email with their log in information. Their request will stay in the Pending list until they log in for the first time. If they tell you they haven't received the email, suggest that they look in their spam folder as some email programs send the automatic email there. If they still can't find the welcome email, you can re-send it by clicking the link circled above.



When you deny an agency, their request will appear in the Denied section of the Membership Requests tab. You can make a note of why you denied their request if you would like. It is still possible to approve the request if necessary, just click the link circled above.



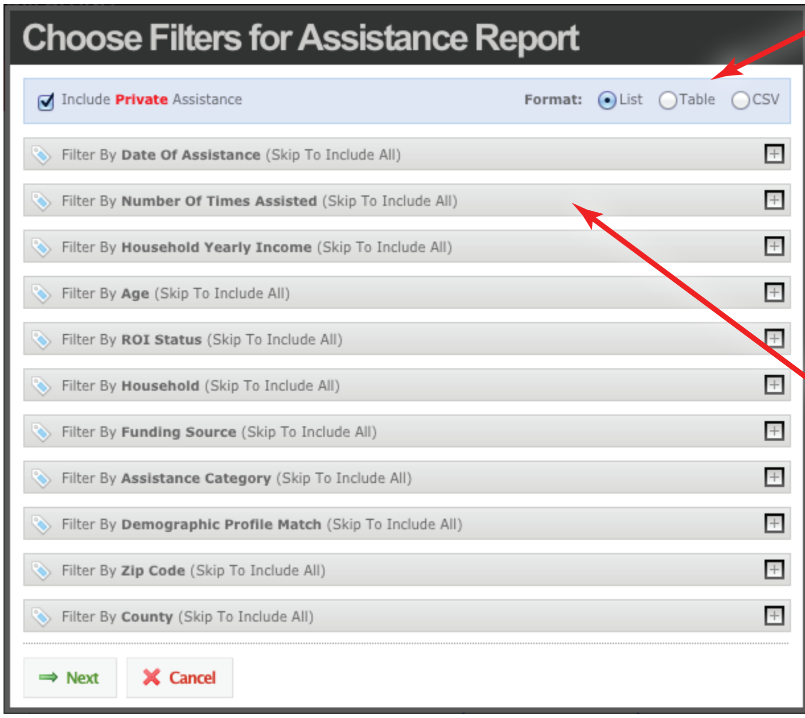
The Reports sub-tab is where you go to run all the reports that pertain to your agency. There are six categories to report on (see the picture below).

Also on this sub-tab is a list of all your Custom Reports. You can tailor a report to your specifications and run it whenever you need to.

The last thing on this sub-tab is a list of Recent Reports. You just need to click the report and Oasis will generate a new report reflecting any recent additions to the Oasis database.

Running a report is a simple process. Let's go over the steps.

For this example, we are going to run an Assistance report. This report will give you a record of all the assistance your Oasis network has provided during a time period that you specify. When you click the button for the Assistance report (shown above in the red box), the following window will open.

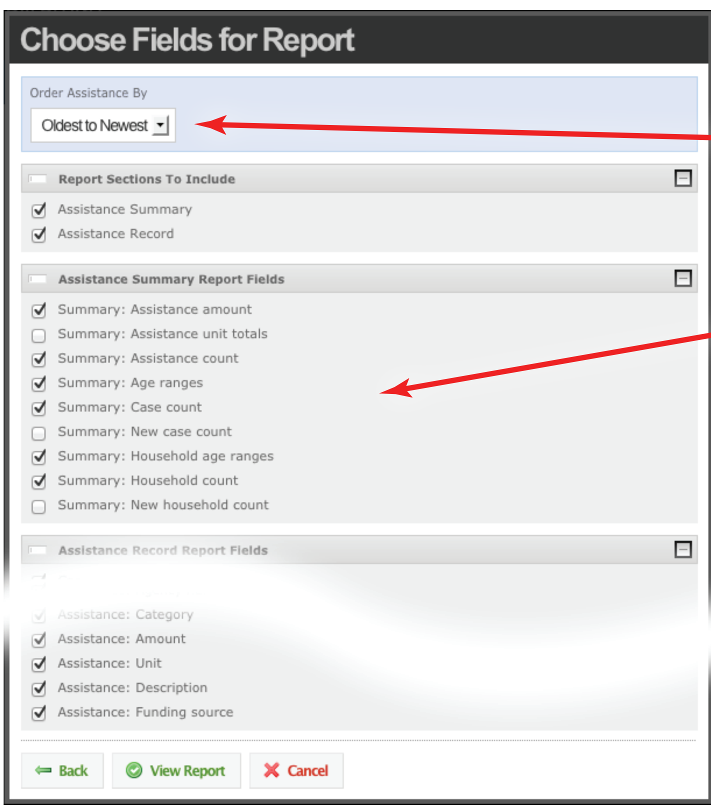


First, you need to select the format most appropriate for your needs. The List and Table formats will allow you to view the report prior to printing. The CSV format will take about 15 minutes, and when it is complete you will be notified by email. You can download your report and open it in a spreadsheet program like Excel.

Next, select the filters to customize your report. Click on each filter and check the appropriate box(es).

Note: *If you do NOT modify a filter, the report will include all information represented by that filter.*

Now click the Next button to go on to the final step.

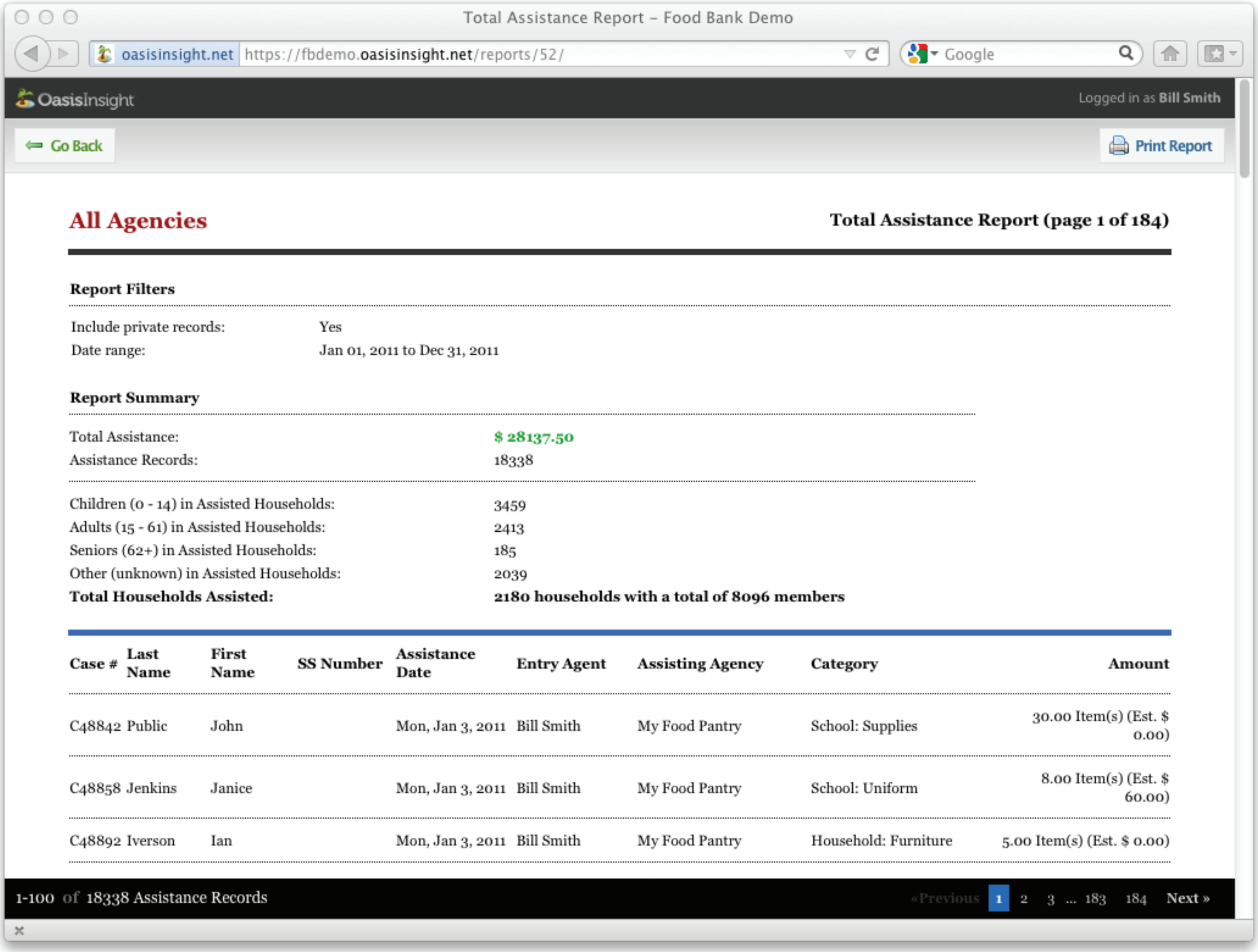


Now you're ready to fine tune your report to include only the information you need.

First, when you click the down arrow for "Order Assistance By", you can order by Oldest to Newest, Newest to Oldest, Category Name, or Case Name.

Next, you simply check or uncheck the boxes beside each description to select the fields you need.

Once you have selected the information you need, click the View Report button. Oasis will open a page containing your report.



Total Assistance Report – Food Bank Demo

oasisinsight.net https://fbdemo.oasisinsight.net/reports/52/

OasisInsight Logged in as **Bill Smith**

Go Back Print Report

All Agencies **Total Assistance Report (page 1 of 184)**

Report Filters

Include private records:	Yes
Date range:	Jan 01, 2011 to Dec 31, 2011

Report Summary

Total Assistance:	$ 28137.50
Assistance Records:	18338
Children (0 - 14) in Assisted Households:	3459
Adults (15 - 61) in Assisted Households:	2413
Seniors (62+) in Assisted Households:	185
Other (unknown) in Assisted Households:	2039
Total Households Assisted:	**2180 households with a total of 8096 members**

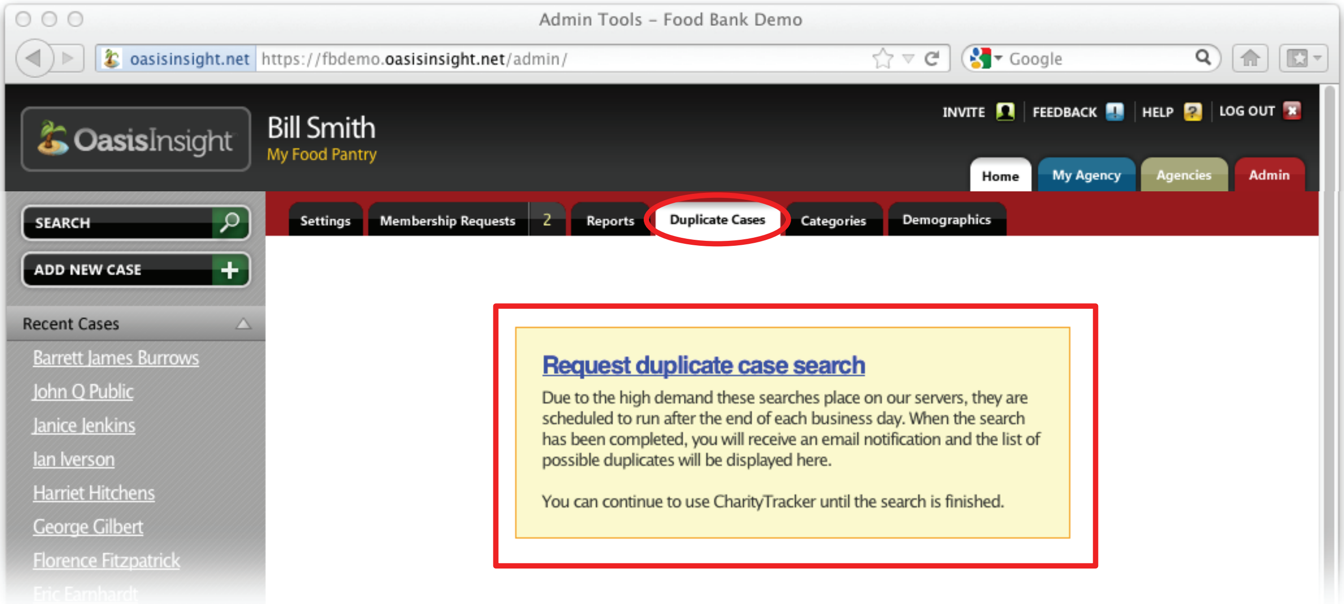
Case #	Last Name	First Name	SS Number	Assistance Date	Entry Agent	Assisting Agency	Category	Amount
C48842	Public	John		Mon, Jan 3, 2011	Bill Smith	My Food Pantry	School: Supplies	30.00 Item(s) (Est. $ 0.00)
C48858	Jenkins	Janice		Mon, Jan 3, 2011	Bill Smith	My Food Pantry	School: Uniform	8.00 Item(s) (Est. $ 60.00)
C48892	Iverson	Ian		Mon, Jan 3, 2011	Bill Smith	My Food Pantry	Household: Furniture	5.00 Item(s) (Est. $ 0.00)

1-100 of 18338 Assistance Records «Previous 1 2 3 ... 183 184 Next »

To print your report, you can click the Print Report button in the upper right corner of the screen.

Tips for Reporting:

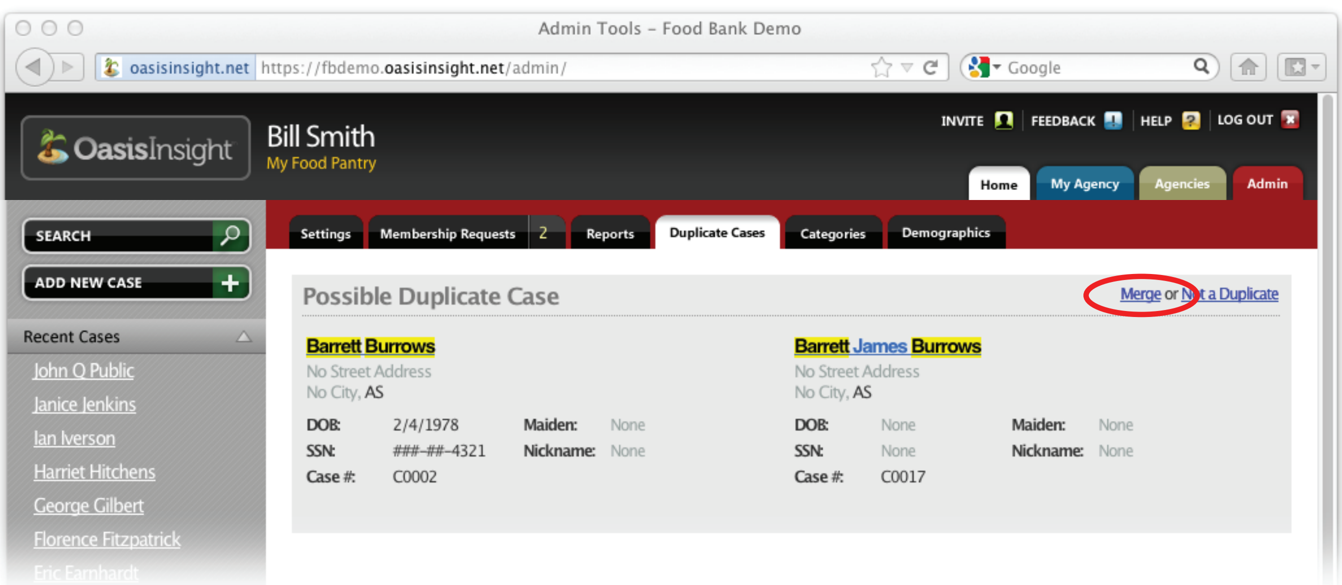
- Everything in the Choose Filters for Assistance Report window (pg. 25) will be included by default.
- We suggest you run a report and check all the boxes on the second screen (pg. 25). Take a look at what you have and work from there.
- When trying to get demographics, remember that when you select multiple demographics you are asking the system to show you individuals who have all those demographics you have selected.
- If you have questions about which report will be most appropriate for your needs, please click the Feedback button in the upper right corner of your Oasis and let us know how we can help.



The Duplicate Cases sub-tab is for finding and merging duplicate records in your Oasis database. If agents in your network are not careful to search before entering a case, a client could be entered into your Oasis more than once.

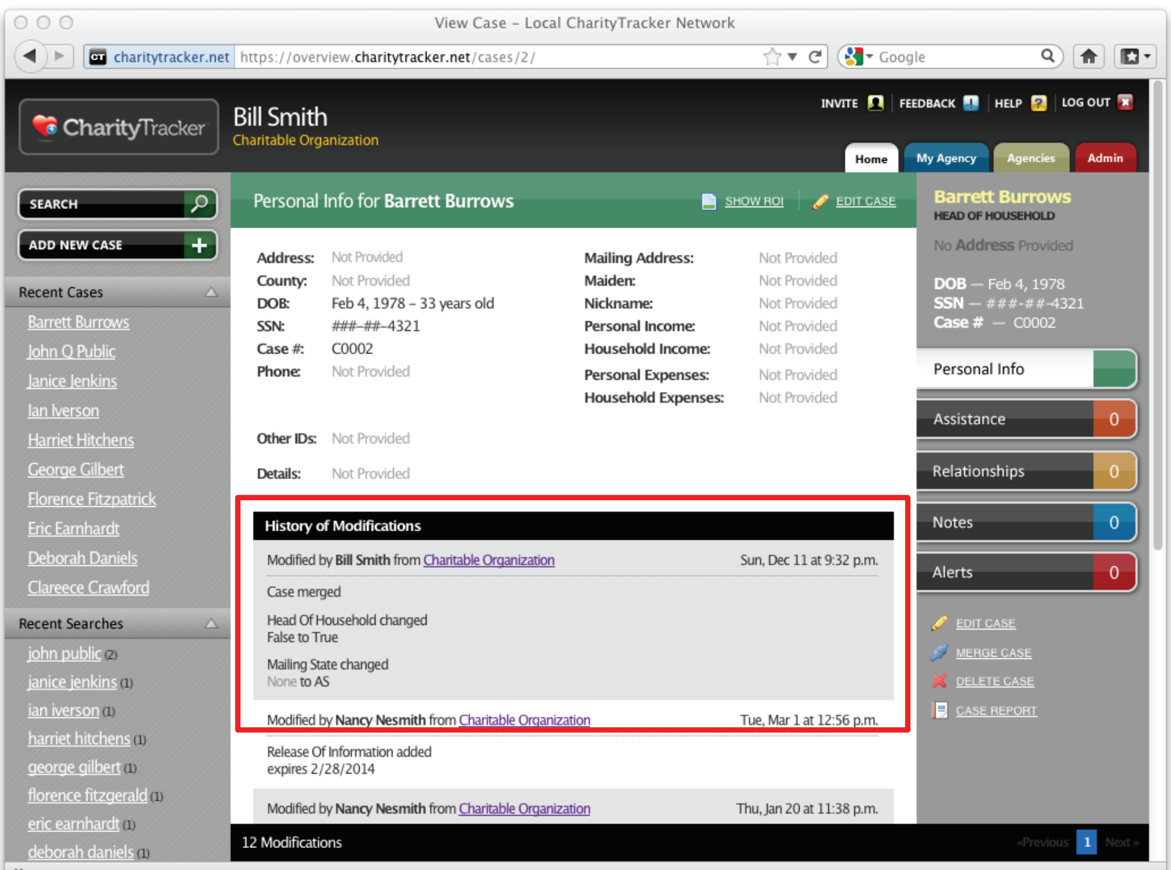
To find the duplicate cases in your Oasis, you must request a duplicate case search (by clicking the link in the red box above). Oasis will search through your entire database looking for duplicates. Because such intensive searching puts a heavy load on the Oasis servers, the search will not be performed until after each workday. You will receive an email notifying you that the report is done, and when you return to this sub-tab a list of possible duplicates will be waiting for you.

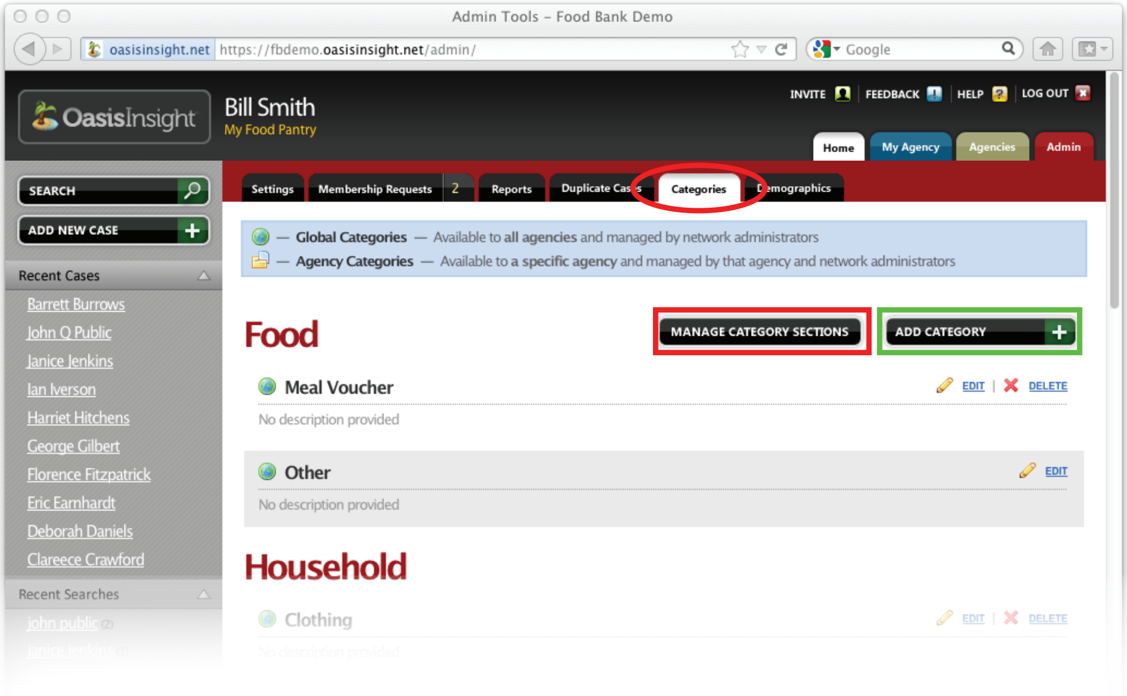
In the list of possible duplicate cases, in each row, you will see two cases that Oasis thinks may be same client. You can choose to mark the cases "Not a Duplicate," or you can choose to merge the cases.



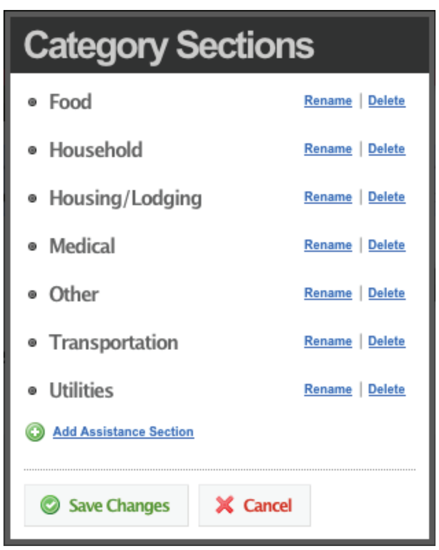
In the window that opens, you decide which piece of information you are going to keep for each field with a discrepancy.

When you click the Merge Cases button, the cases are merged. Oasis will take you to the case so you can review it. You will notice that the History of Modifications section (in the red box below) makes a note that the case has been merged, and keeps track of the information that changed during the merge.

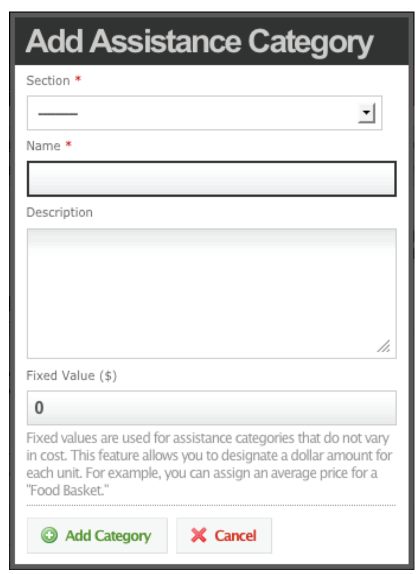




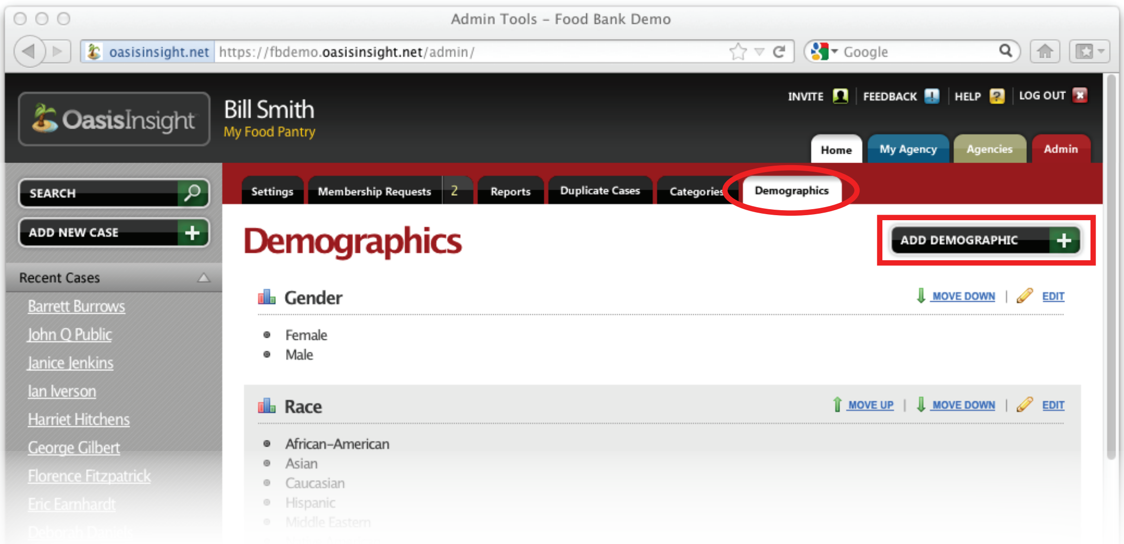
The Categories sub-tab is where you define the categories for assistance records. You can see all Global and Agency categories. Global Categories are set by you, the network administrator. Agency Categories are set by each agency, and they can be managed by both the agency administrator and the network administrator.



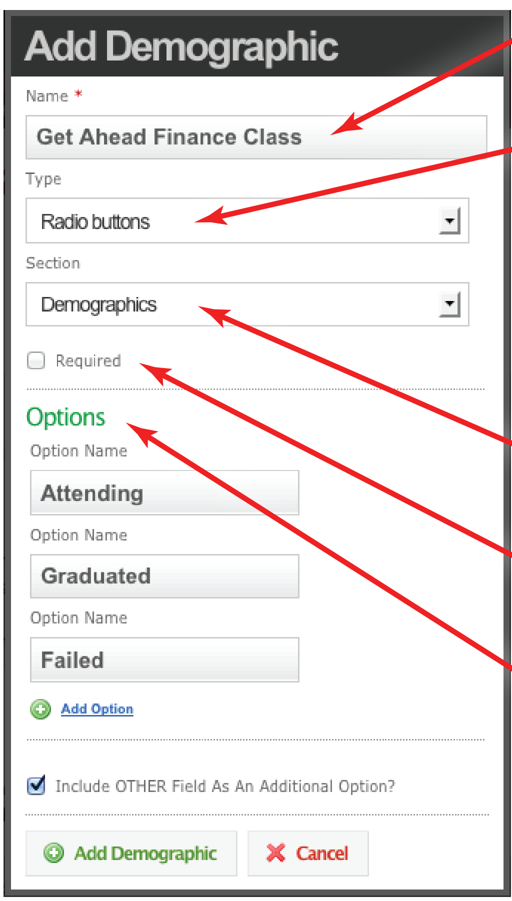
Categories are separated into sections to help keep everything organized. You can add a new category by clicking the Manage Category Sections button (highlighted above with a red box). A window will open and you can add as many sections as you need.



You can add new categories by clicking the Add Category button (highlighted in the top image, in a green box).



The Demographics sub-tab allows you to keep track of all sorts of information. In the following example, we'll create a demographic that keeps track of a client's involvement in a finance class. We'll start by clicking the Add Demographic button (highlighted with a red box).



In the window that opens, enter the name of your demographic.

Next, select how agents will choose from the options:

- Dropdown is a menu with a list of options from which agents will click to select.
- Checkboxes allow your agents the possibility of selecting multiple options.
- Radio buttons allow your agents to choose only one option.

You can also decide which section you want your demographic to be displayed in.

Checking the "Required" box makes a demographic mandatory.

"Options" is where you add all the options for your demographic.

Once you click the Add Demographic button, the demographic will be available to be recorded on all cases.

Thank you for taking the time to look through this user guide. If you have any questions please don't hesitate to contact us!

Email: support@charitytracker.net
Phone: 888.764.0633