



Sport Ireland Coaching

Database Training Manual

Introduction

Welcome to the Sport Ireland Coaching online database. We have developed the database to store all CDPI certified coaches and coach developers/coach developers/coach developer/tutors. This is the definitive list of certified coaches and coach developers/coach developers/coach developer/tutors for all NGB's in Ireland.

It is part of our long term plan to make the Coaching Database as relevant and useful as possible to all our NGB partners. In the future we would envisage that all coaches and coach developers/coach developer/tutors in Ireland will have direct access to their individual data stored on our database.

The database at present has a record of coaches and coach developers/coach developer/tutors that have been certified through Sport Ireland Coaching since the start of the CDPI. By providing your NGB with a username and password we will be giving you access to all your coach and coach developer/tutor information. You will be able to use the database to register CDPI courses and submit candidates details.

The database has been designed to increase the ability to use and explore this data while also improving the usability of the system by presenting an intuitive web based interface. We hope that you will find Sport Ireland Coaching's database easy to navigate.

If at any time when you are using our new Coaching Database and have any suggestion, issues or questions please contact coachingqa@sportireland.ie

Data Protection:

The personal information on your NGB's coaches and coach developers/tutors will be held and used in accordance with the Data Protection Act 1998/2003. Sport Ireland Coaching will not disclose such information to any unauthorised person or body, but where appropriate will use such information in carrying out its various functions and services.

Note: It is your responsibility to inform us if any member of staff who we have given access to our database leaves your organisation as we will need to remove their access rights to the database.

Queries

If you have any queries on the system, please email them to coachingqa@sportireland.ie

Getting Started

To use Sport Ireland Coaching's database, open Internet Explorer and enter <http://db.coachingireland.com> in the address bar. This will bring you to the login page for the Coaching DB. The DB requires all users to have a username and password before logging in. Please enter your username and password in the box.

Log In

User Name:

Password:

☐ Remember me next time.

You can see from the screenshot to the left that you have the option for the system to "Remember me next time", which will mean you only have to enter your username/password the very first time you log in.

Navigation



At all times, the Coaching DB displays a Navigation tree in the leftmost column. This can be clicked to jump between the major sections of the system. The links bring you to the following areas:

Navigation

- NGBs
- People
- Courses
- Add Coach Course
- Add Tutor Course
- Reports
 - People
 - Courses
 - Course Form
 - Attendee Reqs.
 - Stats
- Upload Cmp. Forms
- Completion Forms
- Mail Merge
- Certificate Printing

- 1) NGBs: Displays details about each NGB such as CEO, Board Members and so on, along with Clubs and Contact Info.
- 2) People: Displays details about each person whose information is in the system such as Name, NGBs, Courses, Qualifications and so on.
- 3) Courses: Displays details about each course, such as whether it is a Coach developer/tutor or Coach course, the level achieved by attendees on the course, who attended and whether they completed the course.
- 4) Add Coach Course: Here you can add a new course for approval.
- 5) Add Tutor Course: This section allows Sport Ireland Coaching staff to add a coach developer/tutor course to the system. At present all coach developer/tutor courses are only entered by Sport Ireland Coaching staff.
- 6) Reports: Displays detailed reports on any number of People and Courses. More reports may be added in the future.
- 7) Courses Form: This report will give you summary information on courses run by your NGB. You can search for courses based on approval or completion status between two dates.
- 8) Upload Cmp. Forms: This allows the NGB to securely upload the course completion form which will then be processed by Sport Ireland Coaching.

- 9) Mail Merge: This allows you to run a report and contact the results of that report by post or by email.

Note: If you are using Internet Explorer latest release, in order to view our website correctly you will need to turn on compatibility view.

To turn on compatibility view:

Click the **Compatibility View button**. The Compatibility View button is located to the right of the Address Bar, next to the Refresh button.

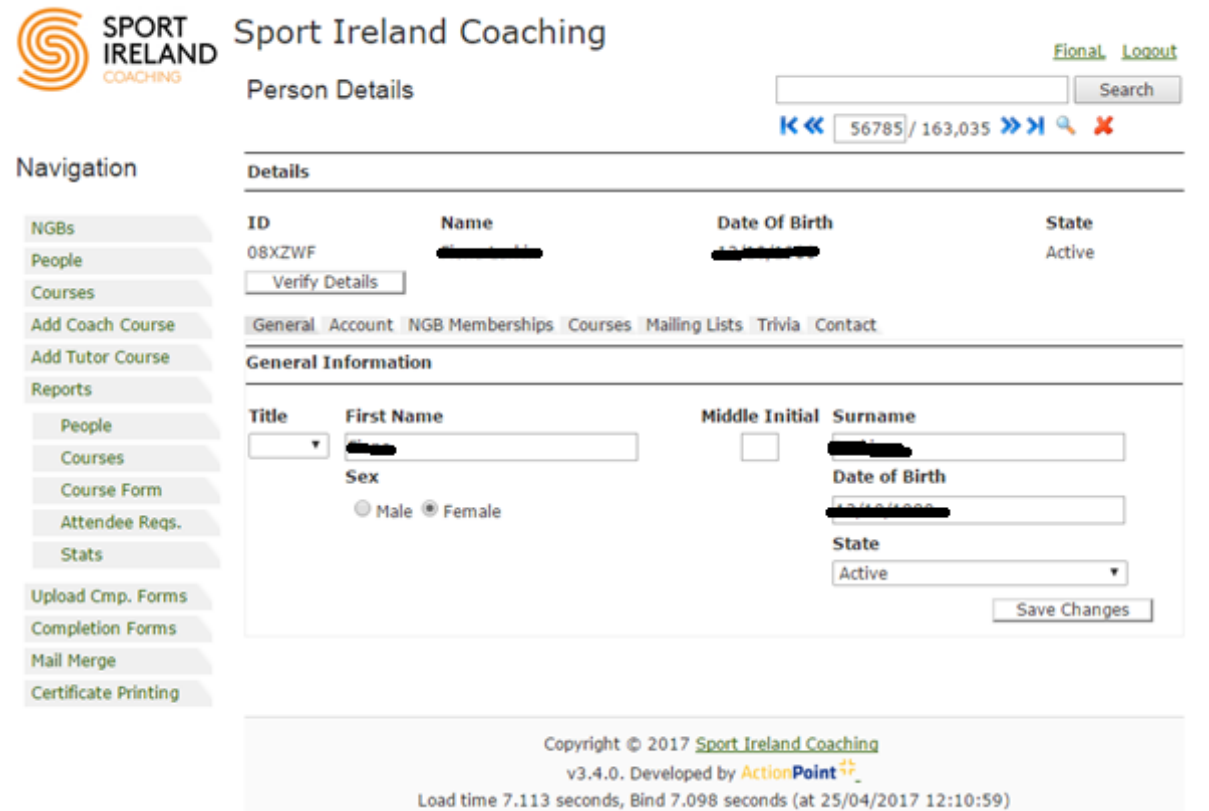


Person ID:

A person id is a unique six character ID (e.g. 07Q4AX) assigned to all people in the Coaching DB. These provide the only guaranteed way to identify an individual person and solve the issue, where, for example, there are 11 John McCarthy's in the database.

Typical View

Below is a typical screen from the Coaching DB. This screen is from the Person section, but the same general layout is used for NGB and Courses sections.



Sport Ireland Coaching

[Fiona](#) [Logout](#)

Person Details

Search

56785 / 163,035

Navigation

- NGBs
- People
- Courses
- Add Coach Course
- Add Tutor Course
- Reports
 - People
 - Courses
 - Course Form
 - Attendee Reqs.
 - Stats
- Upload Cmp. Forms
- Completion Forms
- Mail Merge
- Certificate Printing

Details

ID	Name	Date Of Birth	State
08XZWF	[REDACTED]	[REDACTED]	Active

Verify Details

General Account NGB Memberships Courses Mailing Lists Trivia Contact

General Information

Title First Name Middle Initial Surname

Sex Date of Birth State

Male Female

Active

Save Changes

Copyright © 2017 Sport Ireland Coaching
v3.4.0. Developed by ActionPoint
Load time 7.113 seconds, Bind 7.098 seconds (at 25/04/2017 12:10:59)

- 1) Search area: This allows you to search for any Person in the system. Just start typing in a name or Person ID (e.g. 010ZR78) and hit search to view details. Note if you receive more than one record from your search you can use the controls below the search area to navigate through the results.
- 2) Details summary: This area provides the core details for the Person displayed.
- 3) Detail Tabs: These allow you to pick which aspect of the Person you want to view. You can select General, Account, NGB Membership, Courses, Mailing Lists, Trivia and Contact. For example the Trivia tab displays snippets of information, such as whether they are a forum mailing recipient.
- 4) Detail view: This area changes depending on the currently selected tab. It contains all information for the current Person with respect to the tab selected. For example the detail view above shows a list of all courses this Person attended.
- 5) Data URLs: Any text that is underlined can be clicked to view more information. For example clicking any of the course codes will bring you to the relevant course details page.

Adding Course Approval Form

Coaching Ireland

[trainer](#) [Logout](#)

Add Coaching Course

Course Approval

All relevant details must be entered prior to submitting the course approval form to Coaching Ireland for approval.
You will be notified via email when the course has been approved.

General

NGB:	CCG (Cumann Camogaiochta n	1
Coach Level ID:	2	2
Coach Speciality:	No Available Specialities	3
Course Code:	CCG20001	4 provisional code, pending approval
Title:	CCG20001	5
Description:	Enter description of course (optional)	6
Course Details URL:	Enter web link (optional)	7
Assimilated:	<input type="checkbox"/>	8
Pilot Course:	<input type="checkbox"/>	
Comments:	Enter course comments (optional)	9

Location ?

Line 1:	Enter Address Line 1 (required)	10
Line 2:	Enter Address Line 2 (optional)	
Line 3:	Enter Address Line 3 (optional)	
City/Town:	Enter City/Town (required)	
County:	Antrim	
Country:	Ireland	

Coordinator & Tutors

Course Coordinator: Please select (optional) **11**

Coordinators Added: There are no tutors on the course

Add CDPI Tutor: Please select and add **12**

Tutors Added: There are no tutors on the course

Add Tutor in Training: Please select and add **13**

Tutors In Training Added: There are no Tutors In Training on the course

Add Support Tutor: There are no support tutors av **14**

Support Tutors Added: There are no support tutors on the course

Sessions

Date: **15**

Start Time:

End Time:

Comments: Enter a comment (optional) **16**

Sessions Added: There are no sessions on the course

17

Steps for Completing a Course Approval Form

Please note as you are submitting information directly to our database through the internet there may be a slight delay as information is passed between your pc and our web server. Therefore please allow a couple of seconds for the webpage to update before proceeding to the next step. You will see 'Updating' flashing in the right hand corner of the screen.

Also please note that all information should be entered on the form prior to submitting for approval. To complete the form please fill in the relevant information in the fields provided. Please see instruction for each field below.

1. **NGB:** Your NGB will be automatically selected.
2. **Coach Level ID:** Here you will select course level 0-5
3. **Coach Speciality:** Here you can select the course speciality if appropriate. If you're NGB does not have a course speciality please ignore.
4. **Course Code:** The course code will be automatically generated by the system example LGF0230 (which reads as Ladies Gaelic Football, Level 0, Course number 230. **Please note**

that the code generated by the system is a provisional code only and is not valid until you receive official confirmation by email from us that the course is approved.

5. **Title:** The title of the course will now also be automatically generated by the system. By default it will match the course code and cannot be edited.
6. **Description:** Here you can enter a description of the course. If your NGB uses a different name to describe the course other than that used in the title, you should enter that name here. For example, some NGBs would call a level 0 course a foundation course. If so, please enter that name in the description field.
7. **Course details URL:** If the course has a web link it can be entered here.
8. Please tick this box if the course you are running is a pilot course.
9. **Comments:** Any additional comments that you would like to submit with a course can be added here. For example, if you need Sport Ireland Coaching to organise a Coach Developer Assessor to assess a trainee coach developer/tutor to complete their coach developer/tutor training requirements, please identify this here.
10. **Location:** Here you should record the primary location of the course. If the course is taking place over multiple locations, please just use the primary location. For Northern Ireland addresses please select Northern Ireland from the drop down list, wait a few seconds until the postal code box appears and then insert the appropriate postal code.
11. **Course Coordinator:** You can select the course coordinator for the course from the dropdown list. If a course coordinator does not appear on the list please contact coachingqa@sportireland.ie and we will add them to our list. To add a course coordinator from the list, please select the appropriate person and then click "Add Coordinator". The course coordinators name will be then be displayed below the drop down list.
12. **Add CDPI Tutor:** Please select your CDPI coach developer/tutor from a dropdown list of all certified coach developers/tutors in your NGB. Highlight the appropriate coach developer/tutor and click on the add tutor button to add the selected coach developer/tutor to the course. If more than one coach developer/tutor is delivering on the course, please repeat this step for each coach developer/tutor. All coach developers/tutors who are involved in the course must be listed. Please contact us if you have any queries in relation to a coach developer/tutor not appearing on the list.
13. **Add Tutor in Training:** Please select your trainee coach developer/tutor from a dropdown list of all coach developers/tutors in training in your NGB. Highlight the appropriate coach developer/tutor and click on the Add Tutor in Training button to add the selected coach developer/tutor to the course. Coach developers/tutors-in-Training are people who have started CDPI coach developer/tutor training but have not completed all of the requirements. Please contact us if you have any queries in relation to a coach developer/tutor in training not appearing on this list.

14. **Add Support Tutor:** Please select your support tutor(s) from a dropdown list of all support tutors in your NGB. Highlight the appropriate tutor and click on the add Support Tutor button to add the selected tutor to the course. A Support Tutor is someone with specific expertise, nominated by the NGB, who will assist in the delivery of a coach education course. The total support given by this support tutor should not exceed 25% of the course hours. Please contact us if you have any queries in relation to a Support Tutor not appearing on this list.
15. **Sessions:** Here you can record the start time and finish times of all the coaching sessions that make up the course. For example a typical level 1 course will take place over several days. In this case, each day would be entered as a separate session. Please note when adding the start and finish time, the 24 hour clock must be used. All sessions must be included. If dates of some sessions are not finalised at the time of approval, please include a comment in the comment box provided. The comment box can be used for identifying additional information in relation to the course. For example assessment dates, distance-learning hours etc.
16. **Add Session:** Please click on this button when you wish to add a session to the course.
17. **Complete:** When you have all the data inputted, please click on the complete button.
18. When you click complete a pop up box will appear (see below) asking you to confirm all details are correct. Please take this opportunity to check that you have entered all relevant course information. Please note that once the form is submitted you will be unable to change it. If you have made a mistake on the form, please send an email to coachingga@sportireland.ie and we will rectify it for you.
19. Once you complete the approval form an email will be sent to us, stating that there is a course awaiting approval and we will be in contact with you within 3-5 days with confirmation of approval.
20. **Cancelled courses:** In the event of a course being cancelled, please contact Sport Ireland Coaching at coachingga@sportireland.ie. Sport Ireland Coaching will record the course code on the database as cancelled. To check if a course has been cancelled, locate the relevant course approval form, click "Show status history". A number of dates will appear – the date when approval was sought, when approved and when cancelled.
21. **Approval Detail Changes:** If there is a change of date, venue or coach developers/coach developer/tutors for a course please ensure you contact coachingga@sportireland.ie with the changed details plus the course code. Sport Ireland Coaching admin will complete the necessary changes. An email will be forwarded to you when the changes have been completed.
22. Please note, course approval forms can only be accepted for current and future dates. You cannot seek approval online for courses which have already been delivered.


23. NB – It is important for the NGB contact to keep a list of courses registered for approval to ensure courses are not applied for twice. Use the Course Form Report (page 18) to find out the status of courses and identify which courses you have registered for approval

Course Completion Form

The Course Completion Form can be found by downloading the form from the Upload Cmp. Forms option on the database website. The Course Completion Form is used to provide details on the candidates that attend a CDPI course.

COACHING DEVELOPMENT PROGRAMME FOR IRELAND
EMPOWERING IRISH SPORT

Coaching Course Completion Form



Sign off at Coach Certification Meeting
Coaching Ireland Staff ID: _____ Date: _____
NGB Name: _____ Date: _____

Coaching Ireland
University of Limerick
LIMERICK
Phone: +353 61 202895
Fax: +353 61 202868
www.coachingireland.com
Email: info@coachingireland.com

Note: This form should be completed by the Course Coordinator at the end of the course and uploaded via the Upload Cmp. Forms option on the Coaching Ireland DB Website
Status column: Use C for course candidates who have completed all course requirements or R for course candidates who have not completed all course requirements.
All coaches who attend the course must be listed below, this includes coaches who attend only part of the course.

Course Code: 2		Course Location: 3		Course Coordinator: 4		Start Date: 5	
Tutor 1: 6		Tutor 2:		Tutor 3:		Tutor 4:	

No.	Public Person ID	NGB Member ID	Surname	First Name	Postal Address	Club/School	Date Of Birth	Gender M/F	Status C/R	Phone No	Email Address	Comments
1	7	8	9	10	11	12	13	14	15	16	17	18
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												

- Section 1:** This section can be left blank as the details will be filled in at the course certification meeting.

All information point 2 – 6 should correspond to the course approval form details.

- Course Code*:** Please enter the course code here. Course code is available from the courses approval form or database example: BUI00051. Please do not use dashes in the code.
- Course Location*:** Please enter the primary location of the course here. The full address of the course location should be given as per the approval form. The format of the address should follow the same format as the participants' addresses (see point 11 below)
- Course Coordinator*:** Please enter the course coordinators name here.
- Start Date*:** Please enter the start date of the course here.
- Tutor*:** Please enter all course Coach developer/tutor names who delivered on the course here. You must enter at least one coach developer/tutor but you can enter up to five coach developers/coach developer/tutors along this row.
- Public Person ID:** If you know the participants database id, please enter it here. This field is not compulsory.
- NGB Member ID:** If you know the participants NGB member id, please enter it here. This field is not compulsory.

9. **Surname*:** Please enter the participants surname here. Ensure candidates name has the correct spelling and the first letter is a capital letter
10. **First Name*:** Please enter the participant's first name here. Ensure candidates name has the correct spelling and first letter is a capital letter
11. **Postal Address*:** Please enter the participant's postal address here. A comma is required after each section of the address example: Main Street, Bishopstown, Cork. Full stops and county (Co) are not required. Do not include postal codes for Republic of Ireland addresses. For Northern Ireland candidates, please include Northern Ireland plus postal code Example: 15 Maple Crescent, Carrickfergus, Antrim, Northern Ireland, BT38 9NN. The term N Ireland is NOT acceptable. The postal code must appear at the end of the address – this applies to international addresses also. YOU MUST INCLUDE THE RELEVANT COUNTY FOR NORTHERN IRELAND ADDRESSES (as per example above)
12. **Club/School:** Please enter the name of the participant's school or club depending on which is more appropriate.
13. **Date of Birth*:** Please enter the participant's date of birth here. Example 03/02/1982.
14. **Gender*:** Please enter the participant's gender here.
15. **Status C/R*:** Please enter the participant's status here. C means complete, R means on route to completion i.e. they still have areas outstanding such as assessment, logbook or they may have to catch up on contact time. If participants are R, then please identify in the NGB comment box why the participant is R (see point 18 below)
16. **Phone no:** Please enter the participants primary contact number here. If resident in Northern Ireland please include phone code, example 004477581144. DO NOT INCLUDE ANY SPACES IN THE PHONE NUMBER
17. **Email Address:** Please enter the participants email address here.
18. **NGB Comment:** If you would like to add a comment to any particular participant on a course you can enter the comment here. You must comment on all Rs (i.e. participants who are on route to completion) stating why they are R e.g. did not attend day 2 of the course or need to submit logbook.

When the form is complete please upload the form through the Upload Cmp. Forms option on the database website, this is explained in more detail in the Upload Cmp. Form section of this document.

Please note the fields marked with an * are mandatory and forms **cannot be accepted** unless fully completed.

Upload Cmp. Forms

The Upload Cmp. Forms option enables the NGB to securely upload the course completion form which will then be processed by Sport Ireland Coaching for the purposes of certification. The NGB can use the browse button to select a locally stored course completion form, then select submit to upload the form for processing, this will automatically send an email to Sport Ireland Coaching stating that a new form was received from the specific NGB User that just uploaded the form. The Upload Cmp. Forms screen appears as follow:

Sport Ireland Coaching

[FionaL](#) [Logout](#)

Course Completion

Coach Course Template: [Download](#)

Tutor Course Template: [Download](#)

NGB:

Type: ☒ Coach Course

☐ Tutor Course

Upload: No file chosen

To upload a completion form, follow these steps:

Log in to Sport Ireland Coaching on line DB <http://db.coachingireland.com>

Step 1 Click on Upload Cmp. forms

Step 2 Select and click on the relevant course form template and download

Step 3 Fill in all details on the completion form

Step 4 Save and file the completed completion form. USE THE COURSE CODE AS THE FILENAME.

Step 5 Select NGB

Step 6 Click on Coach or Coach developer/tutor course

Step 7 Click the "Browse" button to select a locally stored course completion form

Step 8 Click on the submit button to submit form securely for processing by Sport Ireland Coaching

Each NGB will receive a message that the completion form has been uploaded successfully and will be processed by Sport Ireland Coaching

General database functions

There are various other functions which the database can perform:

- People Reports
- Course Report
- Course Form Report
- Mail Merge
- Certificate Printing

Reporting

There are two main reporting options, People Reports and Course Reports.

People Reports are used if you wish to gain information on any person who is on our database, be it a coach, coach developer/tutor, service provider etc.

Course Report provides the facility to create reports based on course information stored on our database.

People Reports

People reports can be generated on the following criteria

Tutor/Coach developer Qualification Type	Course Code
Coach Speciality	Coach developer/tutor Level
Coach Certification Date	Coach Level
Coach developer/tutor Certification Date	County
Person Name	Trivia
Attendee Status (per course type)	Club
Person Status	Role
	Gender
	Assimilated Status

To run a people report:

1. Enter your search criteria in the appropriate box.
2. Click "Run Report"

To further analyse the report or if you would like the report in a different format, please select Excel or PDF

For example if you wish to know the number of level 1 coaches in your sport on our database then in Coach Level select the number 1 and then press 'Run Report'. If you wish to view the results of this report in excel simply select Excel.

Please note: different criteria can be combined to give additional refined searches.

For example, if you wish to know the number of level 1 coaches in your NGB in Cork. In Coach Level you would select: 1 and in County: Cork. This would give you the appropriate result.

Below is a typical screen from the Reports section. Below is a report for all Level 1 female coaches for Badminton Ireland who are living in Galway.

People Report

Report Parameters

NGB: BUI (Badminton Ireland)	Course Code:
Tutor Qual. Type: *	Tutor Level: *
Coach Speciality: *	Coach Level: 1
Coach Cert. From: 	County: Galway
To: 	Trivia:
Tutor Cert. From: 	Club:
To: 	Role: *
Person Name: 	Gender: Female
Attendee Status: *	Assimilated: *
Shared Qualification: *	

☐ Tutor Development Programme
 ☐ CPD Course
 ☐ Coach Course

Person Status:
☒ Active
 ☐ Invalid
 ☐ Retired
 ☐ Deceased

NGB Membership:
☒ Active
 ☐ Inactive

Run Report

tries

Excel
PDF

Search:

Reports can be split across multiple pages. Please use the page numbers at the bottom of the screen to scroll through each page of the report or export the report to Excel for further analysis of the information. You can also click on any of the links in the body of the report to jump straight to the database section containing further details.

HANDY TIP

To view further details on a person or NGB, right click on the link (instead of left click) and select 'Open in New Window'. This opens the details in a new window (rather than in the current window) and allows you to easily move between the report and the additional details by clicking on the relevant window. Left clicking on the link opens the additional information in the current window. The problem with this is when you hit the 'Back' button to return to the report, the initial results are cleared and you have to enter the search criteria again to view the report.

Course Reports

Courses can be searched for based on the criteria below. The course reports operates in exactly the same manner as the people report but it's focus is on reporting information of courses.

Type	NGB
Code	Title
Tutor/Coach developer Qualification Type	Tutor/Coach Developer Level
Coach Level	County
Certification Date	Approval Date
No. Tasks Completed	Cancellation Date

To run a Course report:

1. Enter your search criteria in the appropriate box.
2. Click "Run Report"

To further analyse a Course Report, select 'Excel' to export the information to Excel. In Excel, you can do a detailed analysis of the information.

The example below is a report of all Level 2 coach courses delivered by Irish Hockey and the attendees on these courses. If you simply want to run a report of the courses without the attendees, simply untick the attendees box. NOTE: The report can take significantly longer if attendees are ticked.

Courses Report

Report Parameters

<p>Type: * <input type="text"/></p> <p>Code: <input type="text"/></p> <p>Tutor Qual. Type: * <input type="text"/></p> <p>Coach Level: <input type="text" value="2"/></p> <p><input type="text"/> * <input type="text"/></p> <p>Certification Date: <input type="text"/></p> <p><input type="text"/> To: <input type="text"/></p> <p>No. Tasks Completed: <input type="text"/></p> <p><input type="text"/> To: <input type="text"/></p> <p>Attendees: <input checked="" type="checkbox"/> Include</p>	<p>NGB: <input type="text" value="IHU (Irish Hockey Association)"/></p> <p>Title: <input type="text"/></p> <p>Tutor Level: * <input type="text"/></p> <p>County: * <input type="text"/></p> <p>Approval Date: <input type="text"/></p> <p><input type="text"/> To: <input type="text"/></p> <p>Cancellation Date: <input type="text"/></p> <p><input type="text"/> To: <input type="text"/></p>
--	---

HANDY TIP

To view further details on a course, person or NGB, right click on the link (instead of left click) and select 'Open in New Window'. This opens the details in a new window (rather than in the current window) and allows you to easily move between the report and the additional details by clicking on the relevant window. Left clicking on the link opens the additional information in the current window. The problem with this is when you hit the 'Back' button to return to the report, the initial results are cleared and you have to enter the search criteria again to view the report.

Course Form Reports

This report will allow you to get summary information on courses unapproved, approved or certified and by county for your NGB. It can be used as a quick tool for finding out which courses have been approved or certified and which courses have outstanding paperwork, like course completion forms, that has not been submitted to Sport Ireland Coaching yet.

You can search for information based on the following criteria,

Approved Status: Approved/Unapproved/Approved in a specific time period/By County/By Certified status/Certified in a specific time period.

The form operates in exactly the same way as the people report. Please see the people report for more details. The example below is a report of all course approved for the Camogie Association between 1/1/22-1/3/22

Course Form Report			
Report Parameters			
NGB:	CCG (An Cumann Camogaioc ▼)	County:	* ▼
Approved:	* ▼	Certified:	* ▼
Approval Date:	01/01/2022	Certification Date:	
From To:	01/03/2022	From To:	
<input type="button" value="Run Report"/>			

If you want to find out which courses you need to submit candidate details for (via the course completion form) for the purposes of certification by Sport Ireland Coaching, simply run the report with just your NGB selected. Export the information to Excel by clicking the 'Excel' button. Once in Excel, use the filter function to filter the Status column to display only those courses with a status of 'Approved'. These are the courses that Sport Ireland Coaching haven't received a course completion form for. Please submit the relevant course completion form to Sport Ireland Coaching using the Upload Cmp Forms tab on the database in order to get candidates on these courses certified.

Mail Merge from Database

In order for mail merge to work correctly the following folders must be setup on the user's pc. Mail merge operates in the same manner as people and course reports however for it to work correctly on your machine you will have to follow the setup instructions below.


Once-off setup instructions

You need to set this up on a once-off basis on each computer that will be using Mail Merge:

- 1) Create the folder c:\MailMerge. When labelling the folder, please do not leave any spaces between 'Mail' and 'Merge'. Type it as one word.
- 2) Log in to CoachingDB and go to Mail Merge section
- 4) Right click each of the Letter Template and Label Template documents (located at bottom of screen) and choose "Save Target as..." to save them to c:\MailMerge
- 5) Create a shortcut on the desktop for each of the downloaded template documents called "MailMerge Letter Template" and "MailMerge Label Template". Right click on each document in the MailMerge folder, click on 'Create Shortcut' and then drag the shortcut onto your desktop.

User instructions

The diagram below shows list of search criteria.



SPORT IRELAND
COACHING

Sport Ireland Coaching

[FionaL](#) [Logout](#)

Mail Merge

Navigation

- NGBs
- People
- Courses
- Add Coach Course
- Add Tutor Course
- Reports
- People
- Courses
- Course Form
- Attendee Reqs.
- Stats
- Upload Cmp. Forms
- Completion Forms
- Mail Merge
- Certificate Printing
- Change Requests

Mail Merge Parameters

NGB: * <input type="text"/>	Coach Level: * <input type="text"/>	
Tutor Qual. Type: * <input type="text"/>	Tutor Level: * <input type="text"/>	
Gender: * <input type="text"/>	County: * <input type="text"/>	
Trivia: <input type="text"/>		
<div style="display: flex; flex-wrap: wrap;"> <div style="width: 33%;"><input type="checkbox"/> Administrator</div> <div style="width: 33%;"><input type="checkbox"/> Designated Support Tutor</div> <div style="width: 33%;"><input type="checkbox"/> Internal Monitor</div> <div style="width: 33%;"><input type="checkbox"/> API User</div> <div style="width: 33%;"><input type="checkbox"/> Director</div> <div style="width: 33%;"><input type="checkbox"/> NGBContact</div> <div style="width: 33%;"><input type="checkbox"/> BoardMember</div> <div style="width: 33%;"><input type="checkbox"/> Education and Training Council</div> <div style="width: 33%;"><input type="checkbox"/> President</div> <div style="width: 33%;"><input type="checkbox"/> CEO</div> <div style="width: 33%;"><input type="checkbox"/> External Monitor</div> <div style="width: 33%;"><input type="checkbox"/> Provincial Manager</div> <div style="width: 33%;"><input type="checkbox"/> Coaching Committee</div> <div style="width: 33%;"><input type="checkbox"/> External Programme Reviewer</div> <div style="width: 33%;"><input type="checkbox"/> Regional Development Officer</div> <div style="width: 33%;"><input type="checkbox"/> Coaching Contact</div> <div style="width: 33%;"><input type="checkbox"/> Facilitator</div> <div style="width: 33%;"><input type="checkbox"/> Secretary</div> <div style="width: 33%;"><input type="checkbox"/> Course Coordinator</div> <div style="width: 33%;"><input type="checkbox"/> Headquarters</div> <div style="width: 33%;"><input type="checkbox"/> TLG Contact</div> <div style="width: 33%;"><input type="checkbox"/> DataManager</div> <div style="width: 33%;"><input type="checkbox"/> HP Contact</div> <div style="width: 33%;"><input type="checkbox"/> WebAdmin</div> <div style="width: 33%;"><input type="checkbox"/> DataReader</div> </div>		
Person State: <input checked="" type="checkbox"/> Active <input type="checkbox"/> Invalid <input type="checkbox"/> Retired <input type="checkbox"/> Deceased		
NGB Membership: <input checked="" type="checkbox"/> Active <input type="checkbox"/> Inactive		

- 1) Log into CoachingDB and go to the Mail Merge section.
- 2) Pick your search criteria and hit the View button
- 3) In the report viewer section, click on the black arrow beside the blue floppy disk symbol and select Excel.
- 4) Save the Excel file that is created to c:\MailMerge\Mail_Merge.xls.
- 5) On your desktop, double click "MailMerge Letter Template", click Yes on the dialog that pops up and then follow the instructions in the letter body.
- 6) On your desktop, double click "MailMerge Label Template", click Yes on the dialog that pops up and follow the same instructions as in the letter body
- 7) On your desktop, double click "MailMerge Email Template", Click Yes on the dialog that pop up and type in the details of your email that you wish to send.

Mail Merge from Course Completion Form – Creating Address Labels

This section identifies how to create address labels from the EXCEL course completion form. This function is useful when posting out certificates to participants following a course.

- 1) Open the course completion form.
- 2) Select the names and addresses of the individuals you want to create labels for.
- 3) Copy these individuals
- 4) Open a new file [Blank Workbook]
- 5) On the Edit menu, select Paste Special and click values
- 6) Select the addresses (not the names) and from the toolbar select Data and Text to Columns
- 7) Check Delimited is selected and click Next
- 8) Check Comma is selected only and click Next and then Finish. The addresses should now be spread out over different cells with a different cell for each address line.
- 9) Label the first row with column headers e.g. First Name, Surname, Address 1, Address 2, Address 3 etc
- 10) Save the Excel file.

- 11) Open Microsoft Word
- 12) On the **Tools** menu, select **Letters and Mailings**, and then click **Mail Merge**
- 13) In the first two steps of the Mail Merge Wizard, select the document type and start the document. If you're creating mailing labels, click **Labels** in Step 1, and then click **Label options** in Step 2 to select the size and type of labels to print.
- 14) Select recipients in Step 3. Click 'Browse' to select recipients from a file. Locate the Excel file saved earlier. Make sure Sheet 1 is selected and the box 'First row of data contains column headers' is ticked. The Mail Merge recipients will appear in a window. Click ok.
- 15) Click Next to move to Step 4 where you arrange your labels. Select 'Address Block' to select the format for the address. Click 'Match Fields' and use the dropdown list to select the proper database field for each address field component. For example, if there are five lines in the address use Company for the first line of the address, Address 1 for the second line of the address, Address 2 (under Optional Information) for the third line of the address and so on. Click OK and then OK again to get back to your Word document.
- 16) Select 'Update all labels' to copy the layout of the first label to the other labels.
- 17) Click Next to move to Step 5 where you can preview the labels.
- 18) If you are happy with the preview, click next to complete the merge.

Mail Merge from the People Report – Creating Address Labels

This section identifies how to create address labels from a People Report. This function is useful when posting information to participants.

- 1) Select the addresses you want to create labels for. From the toolbar, select Data and Text to Columns
- 2) To separate the address lines over different columns, check Delimited is selected and click Next
- 3) In the Other box, type 0010 while keeping your finger pressed on ALT on the keyboard. You won't see any numbers in the box but you will notice from the Data Preview Pane that the address lines separate over different columns. Click Next and then Finish.
- 4) To separate the First Name and Surname, highlight the data and select Date and Text of Columns from the toolbar. Check Delimited is selected and click Next. Check Comma is selected only and click Next and then Finish. The first name and surname should now be spread over separate columns.

- 5) Select the names and addresses of the individuals you want to create labels for. Copy and paste the information into a new workbook.
- 6) Label the first row with column headers e.g. First Name, Surname, Address 1, Address 2, Address 3 etc
- 7) Save the Excel file.
- 8) Open Microsoft Word
- 9) On the **Tools** menu, select **Letters and Mailings**, and then click **Mail Merge**
- 10) In the first two steps of the Mail Merge Wizard, select the document type and start the document. If you're creating mailing labels, click **Labels** in Step 1, and then click **Label options** in Step 2 to select the size and type of labels to print.
- 11) Select recipients in Step 3. Click 'Browse' to select recipients from a file. Locate the Excel file saved earlier. Make sure Sheet 1 is selected and the box 'First row of data contains column headers' is ticked. The Mail Merge recipients will appear in a window. Click ok.
- 12) Click Next to move to Step 4 where you arrange your labels. Select 'Address Block' to select the format for the address. Click 'Match Fields' and use the dropdown list to select the proper database field for each address field component. For example, if there are five lines in the address use Company for the first line of the address, Address 1 for the second line of the address, Address 2 (under Optional Information) for the third line of the address and so on. Click OK and then OK again to get back to your Word document.
- 13) Select 'Update all labels' to copy the layout of the first label to the other labels.
- 14) Click Next to move to Step 5 where you can preview the labels.
- 15) If you are happy with the preview, click next to complete the merge.

If you have any queries on the system, please email them to coachingqa@sportireland.ie