Usernames are either their Windows Domain network login or their @alcf.net email address.

For now, passwords are their Windows Domain network password. But future versions may need to consider non-Domain logins to be allowed into the back end system. And of course, if there is another application for the "Front-End" (e.g. congregation-facing), those would obviously require non-domain logins as well.

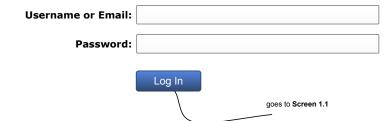
Note that for now there will be no "Forgot My Password" type of functionality. Any "Forgot My Password" issues should be directed to IT Support.

# ALCF Church Management System

# **ChMS Staff Login**

The ALCF ChMS is only for use by authorized ALCF Staff Members. Please log in using your ALCF username and password below.

If you forgot your login credentials, please contact IT support at it@alcf.net.



#### ALCF Church Management System IA Membership Subsystem 1.1 Main Menu

#### Main Menu

This acts as the "Main Menu" for the entire adminsite of the application.

It also includes two "quick search" options at the top of the page.

There are two roles for Staff Members who are using the ChMS Membership Subsystem: · View-Only User (similar to Staff user, but without any edit privileges whatsoever) Staff User

· ChMS Administrator

For the most part, ChMS Administrators have the ability to add/delete other users, and also have the capability of setting permissions on each Staff User. Staff Users can have the following permissions set

- · CanViewStewardship
- CanViewConfidentialNotes
- CanMergeIndividuals
- CanEditMembershipStatus

TODO: "Organization" or "Company" will need to be defined, in order to support organizations / companies that have financially given to ALCF in

# **ALCF** Church Management System

**PEOPLE GROUPS** LOG OUT **HOUSEHOLDS** COMMUNICATIONS ADMINISTRATION

# Main Menu





People goes to Screen 2.1

Manage individual membership records

Households

Manage household records

goes to Screen 3.1

Manage group records Groups

goes to Screen 4.1.1

Communications

Manage communication lists

goes to Screen 5.1

The Administration button and tab (in the navbar) Administration

is only accessible to those ChMS Users that have this permission.

goes to Screen 6.1

Manage administration tasks for the ALCF ChMS

ChMS Main IA.graffle Thu Feb 04 2010 Page 2 of 55



Welcome, Joe User

#### ALCF Church Management System IA Membership Subsystem 2.1 Search Individuals

#### Search for an Individual

This allows the user to search for an any individual in the ChMS.

Each individual can be a membership status of type:

• Member

- Child of Member
- Former Member
- N---

Children may or may not necessarily have membership status. Note that for purposes of reporting, children of parents who are members would be considered a "member" when it comes to annual reports / totals.

Membership status cannot be manually assigned. Only users with CanEditMembershiStatus permission can specify a membership period for an individual, which will then update the calculation of "membership status" for that individual.

Reminder: Membership Status is based on the individual and *not* the household. So it is possible to have a household where one is a member and the other one is a non-member/tithe.

Columns can be sorted by any column in either ascending or descending order. By default, it is sorted by Last Name in ascending order.

Clicking any First or Last name for an individual with take the user to **Screen 2.2** for that individual.

To ask Oom: currently we have some businesses in ACS due to a donation from a business, specifically. They are currently "individuals" in ACS.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

# Search for an Individual

# Search / Filter List First Name Last Name - View All Statuses Refresh List refreshes table below

Results: Viewing people 1-20 of 2141.

	Results: Viewing people 1-20 of 2141	•			Previous   Next
	First Name	LAST NAME v	Membership Status	Address	<u>Cit</u> y
	Page	Alexander	Non-Member	41098 Mill Valley Way	Anderson
	Silvanus	<u>Barry</u>	Non-Member	1040 La Canada Flintridge Dr.	Hercules
/	Susy	, <u>Barry</u>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
	Walden	<u>Barry</u>	Non-Member	31558 Kerman Blvd.	East Palo Alto
	Benedict	Bennett	Member	30811 Palm Springs Road	Bell
	<u>Dandy</u>	Brooks	Member	88436 Mountain View Road	Commerce
	Burleigh	<u>Buckley</u>	Non-Member	54019 Industry Ave.	Capitola
	Bass	Burke	Non-Member/Tithe	59216 Reedley Dr.	Antioch
	<u>Amorita</u>	Chang	Member	30200 Elk Grove St.	Agoura Hills
	Worthington	Coleman	Non-Member/Tithe	25835 Emeryville Blvd.	Hillsborough
	<u>Lula</u>	Collins	Non-Member	80939 Canyon Lake Dr.	Colton
	Minna	Cook	Member	2279 Sonora Road	Lakeport
	<u>Tilda</u>	Cullen	Non-Member	83531 Chico Blvd.	Biggs
	Russell	Cunningham	Member	54957 Hughson Way	Laguna Niguel
	Abbie	<u>Davis</u>	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
	Martie	<u>Davis</u>	Non-Member/Tithe	33924 Fullerton St.	La Mesa
	Toinette	Davis	Member	41077 Dorris Dr.	Truckee
	Bowie	<u>Doherty</u>	Non-Member	37431 Santa Monica St.	Salinas
	Griz	<u>Donnelly</u>	Non-Member/Tithe	65033 Cudahy Blvd.	Blythe
	<u>Tina</u>	<u>Doyle</u>	Member	77280 Redwood City Way	Indian Wells
	<u>Beverly</u>	<u>Duffy</u>	Non-Member/Tithe	12497 La Habra Road	Fort Bragg

Welcome, Joe User

ALCF Church Management System IA Membership Subsystem 2.2 View Individual, Gen Prof, Single Household

View an Individual – General Profile Tab Single Household

This screen shows the details of any given individual in the system.

Depending on the type of individual, the screen the individual would show up on would be on one of the following wireframes:

- Individual that is part of a multi-person household would be displayed on Screen 2.2
- Individual that is part of a single-person households (e.g. single person) would be displayed on Screen 2.2.1
- Individual that has no household record (e.g. no home address on file) would be displayed on Screen 2.2.1.1
- Individual that is part of multiple households would be displayed on Screen 2.2.2

Any fellow household members for all households that an individual belongs to is also listed on the page.

Individuals defined in a household are individuals with the same home address that are in the same family unit (one or two parents and their children or children that they are legal guardians of).

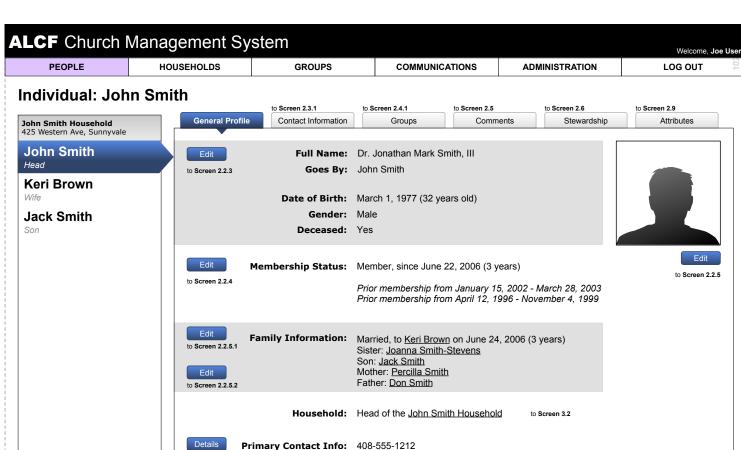
Roommates, although they live in the same home address, are not considered in the same household. Moreover, adult siblings (e.g. two siblings that are both adults that happen to be roommating in the same house) would not be considered in the same household as well. The general rule of thumb for 'same family until' is: if the family requires just one stewardship receipt, then they would generally be considered in the same family until. If an individual in that family requires a separate receipt, then they would likely be a candidate as a "separate household".

Households must have one and only one person marked as the "head of household". Note that due to a lack of data, we may have individuals that are children with no data for the child's parents. If we have no data for their parents, but we have a home address, then the child would be in a single-person household and would be the "head of household". This would be changed once the parent information is entered.

For any other members of a household other then "head", the system will try and deduce the relationship to the head of household based on any declared family relationships. Otherwise, it will simply say "other" with the option for the user to explicitly specify the relationship using a text field.

There can only be one Head of Household.

Clicking on any of the names will take the user to the Screen 2.2, Screen 2.2.1, Screen 2.2.1.1 or Screen 2.2.2 for that individual, depending on the individual him/herself according to the rules detailed above.



ismith@gmail.com

Merge Records

Record last updated on February 23, 2009 by Doris Cohen

to Screen 2.3.1

View Change Log

ChMS Main IA.graffle Thu Feb 04 2010 Page 4 of 55



768 p

+240 bx

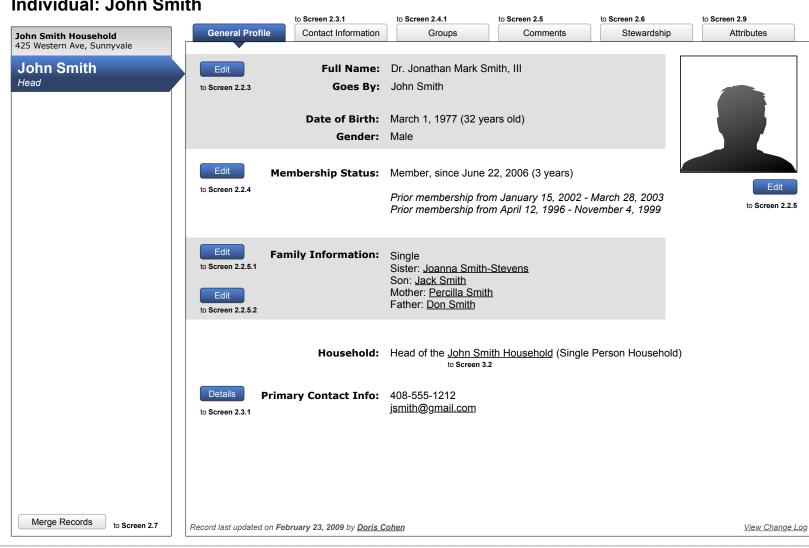
ALCF Church Management System IA Membership Subsystem 2.2.1 View Individual, Gen Prof, Single

View an Individual - General Profile Tab Single-Person Household

See Screen 2.2 for notes.



# Individual: John Smith



Page 5 of 55

ALCF Church Management System IA Membership Subsystem 2.2.1.1 View Individual, Gen Prof, No Household

View an Individual - General Profile Tab No Household on File

See Screen 2.2 for notes.

There may be several reasons why we have an individual that has no household information on file: · They signed up at a ministry event using only an email address and/or phone number

- They sent in a tithe without any home address
- . The individual is homeless and does not have a home address, only a contact address (e.g. a shelter and/or a PO Box)

Individuals without a household record on file and individuals with a household record on file are treated the exact same and have the exact same rules in the system.

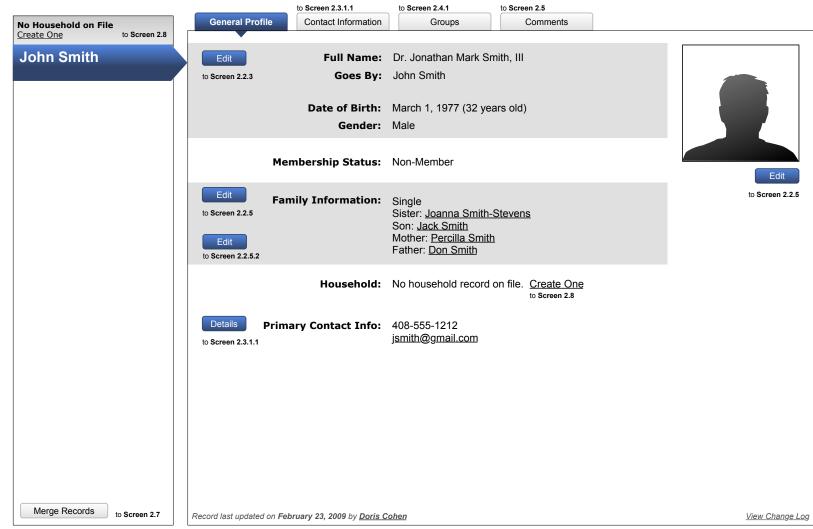
The only difference is that individuals without a household record on file can have a home phone associated with the individual. Otherwise, the home phone is normally associated with the household record.

Ask Oom: Do we track stewardship for Individuals with no household / home address on file? How do we do that?



**PEOPLE GROUPS HOUSEHOLDS** COMMUNICATIONS ADMINISTRATION LOG OUT

# Individual: John Smith



Welcome, Joe User

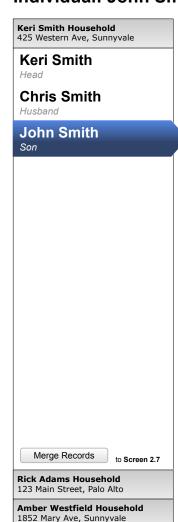
ALCF Church Management System IA Membership Subsystem 2.2.2 View Individual, Gen Prof, Multiple Households

View an Individual - General Profile Tab Multiple Households

See Screen 2.2 for notes.

**ALCF** Church Management System Welcome, Joe User **PEOPLE GROUPS HOUSEHOLDS** COMMUNICATIONS ADMINISTRATION LOG OUT

# Individual: John Smith





Father: Chris Smith

to Screen 3.2 **Households:** Son in the Keri Smith Household

> Son in the Rick Adams Household Minor in the Amber Westfield Household

**Primary Contact Info:** 408-555-1212

jsmith@gmail.com

Clicking on any of the other households will refresh the accordion, showing the members of that household and the individual's role in that household.

Record last updated on February 23, 2009 by Doris Cohen

to Screen 2.2.5.2

Details

to Screen 2.3.1

View Change Log

to Screen 2.9

Attributes

Edit

to Screen 2.2.6

#### ALCF Church Management System IA Membership Subsystem 2.2.3 Edit Individual, General Information

#### Edit an Individual - General Information

This screen allows a user to edit an individual's General Information, including name, church status, DOB and gender.

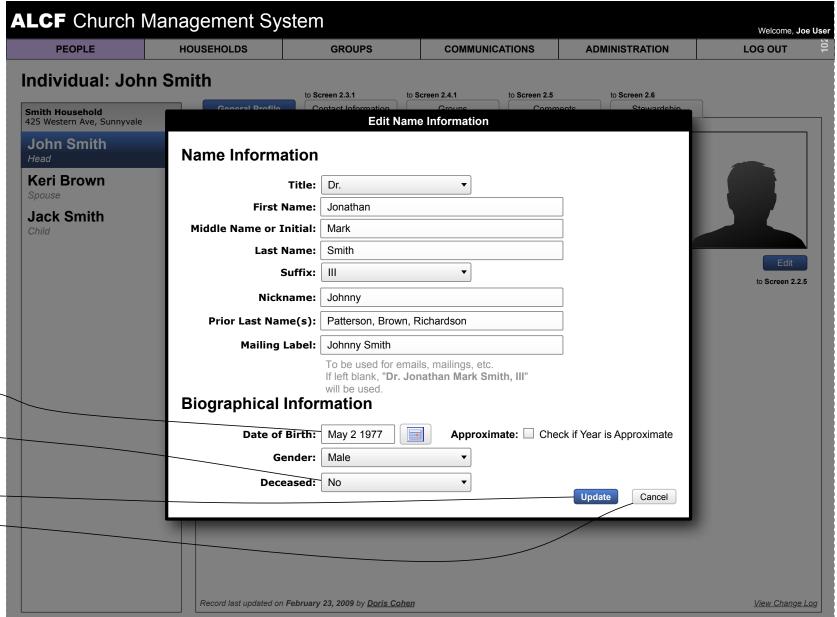
Date of Birth allows the user to enter in a full Month/ Day/Year combination. If a date is entered, all three are required.

If "Deceased" is "Yes", then an added textbox will appear where the user can enter in optional data on the date deceased.

Update will save the form data and then close the window (taking the user back to where he or she came from).

Cancel will simply close the window (taking the user back to where he or she came from) without saving anything to the database.

Thu Feb 04 2010 Page 8 of 55



ALCF Church Management System IA Membership Subsystem 2.2.4 Edit Individual, Membership Information

Edit an Individual - Membership Information

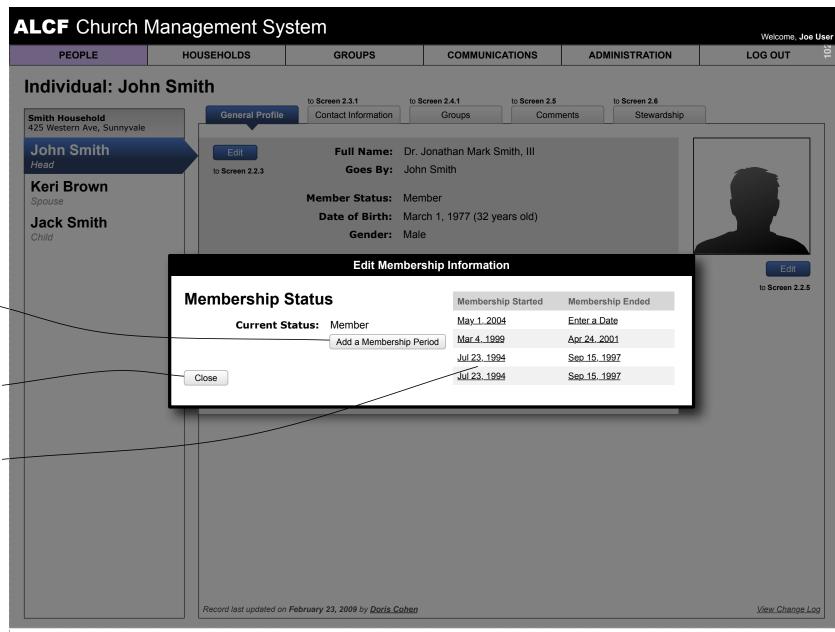
This screen allows a user to edit an individual's Membership Information.

Note that the actual Membership Status is calculated based on the start and end date of an individual's membership period.

Only if the Individual is currently not a member, a "Add a Membership Period" button will be visible. This button will go to the dialog box on Screen

Close will simply close the window (taking the user back to where he or she came from)

Clicking on any of the dates will change the dialog box to what is seen in Screen 2.2.4.1



Thu Feb 04 2010 Page 9 of 55

#### ALCF Church Management System IA Membership Subsystem 2.2.4.1 Edit Individual, Membership Dates

#### Edit an Individual - Membership Dates

This screen allows a user to edit the dates for an individual's specific membership (or in adding a new membership).

The "Start" date is required. The "End" date is only required if we are editing an old membership and there is a current, active membership in place. Otherwise, it is not required.

If we are entering a new membership or editing the current membership, the title will be updated to reflect that.

If entering a Membership Ended date, then Reason for Termination will appear with the following options:

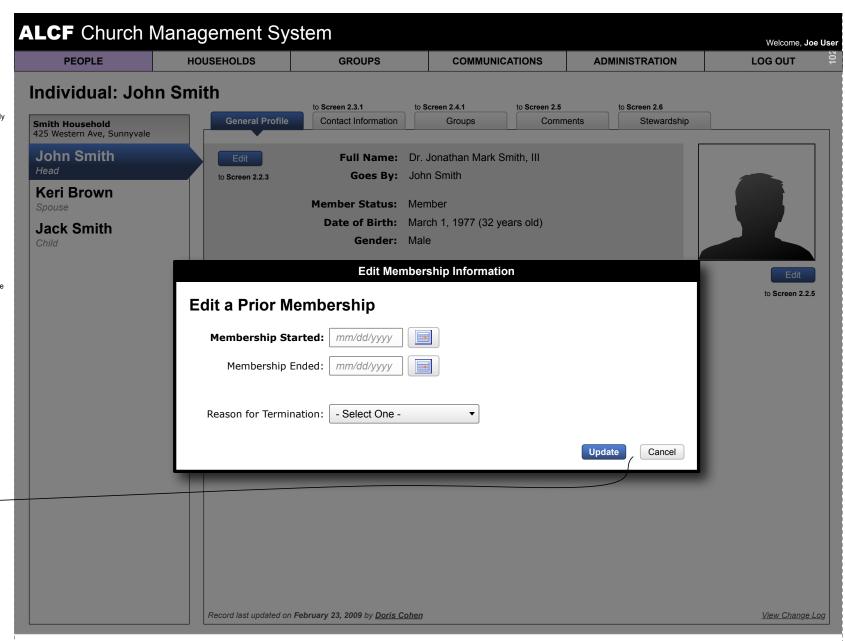
- · Moved out of the area
- Deceased

Thu Feb 04 2010 Page 10 of 55

If selecting "Other", an additional textbox will appear allowing the user to enter in more

This list of reasons is managed by the ChMS Administrator.

Both buttons take us back to the dialog box in Screen 2.2.4





#### ALCF Church Management System IA Membership Subsystem 2.2.5.1 Edit Individual, Marriage Status

#### Edit an Individual - Marriage Information

This screen allows a user to edit an individual's marriage information.

Note that adding or editing a relationship will change it "both ways".

So if the user edit's "John" and specifies that "Keri" is John's wife, then Keri's record will automatically show John as Keri's husband.

Married Status contains the following options:

- None or Not Defined
- Single Married
- Separated

If a "Married To" name is entered, that name must he associated with an actual database record for that Individual

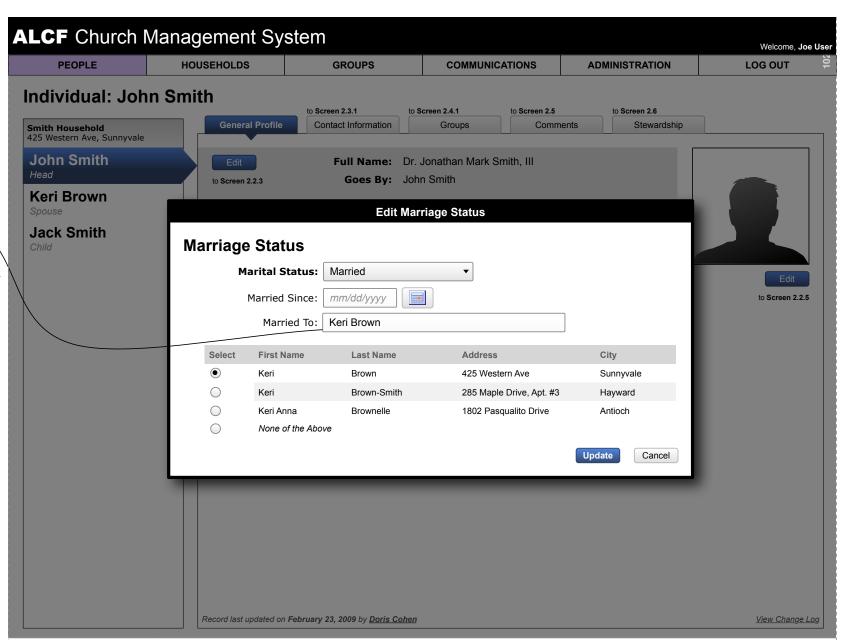
Therefore, changing the name will refresh the datagrid of individuals. If a name is entered, the individual must be selected — if "None" is selected. then the user will be prompted "Create a new database record for 'Keri Brown' as a new Individual?" The user must either specify "Yes" or must enter in another name to find the Individual's record in the database.

If a new individual is created, then the individual will automatically be added to this person's household. If an existing individual is selected, then the user will be prompted "Combine household data into a single household?"

If attempting to defined a marriage relationship with an individual that is already married to someone else, the system will alert the user that the marriage relationship cannot be defined, and the user will need to manually resolve the issue.

Update will save the data and then close the window (taking the user back to where he or she came from).

Close will simply close the window (taking the user back to where he or she came from) without saving anything to the database





#### ALCF Church Management System IA Membership Subsystem 2.2.5.2 Edit Individual, Family Information

#### Edit an Individual - Family Information

This screen allows a user to edit an individual's family relationships.

Note that adding or editing a relationship will change it "both ways".

So if the user edit's "Chris" and specifies that "Joanne" is Chris's sister, then Joanne's record will automatically show Chris as Joanne's brother.

Grey area will only appear when editing an existing family relationship, or when creating a new one. \

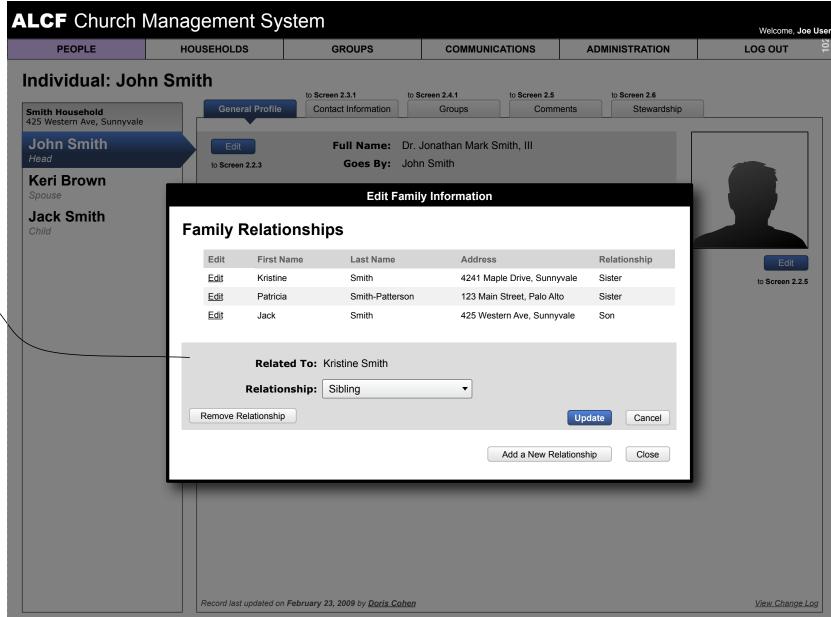
The relationship drop down consists of the following options:

- SiblingParent
- Child

Extended family relationships (aunt / uncle, cousin, mother-in-law, etc.) can be deduced by the system in future versions, but are never explicitly defined by the user.

Clicking on Add a New Relationship will first prompt the user for the related individual's name information. The system will then do a sound-ex based duplication search and prompt the user to select "an existing individual from the list" or will have the option to "create as a new individual"—a similar process to how individuals are selected in the rest of the system.

**Close** close the window (taking the user back to where he or she came from).





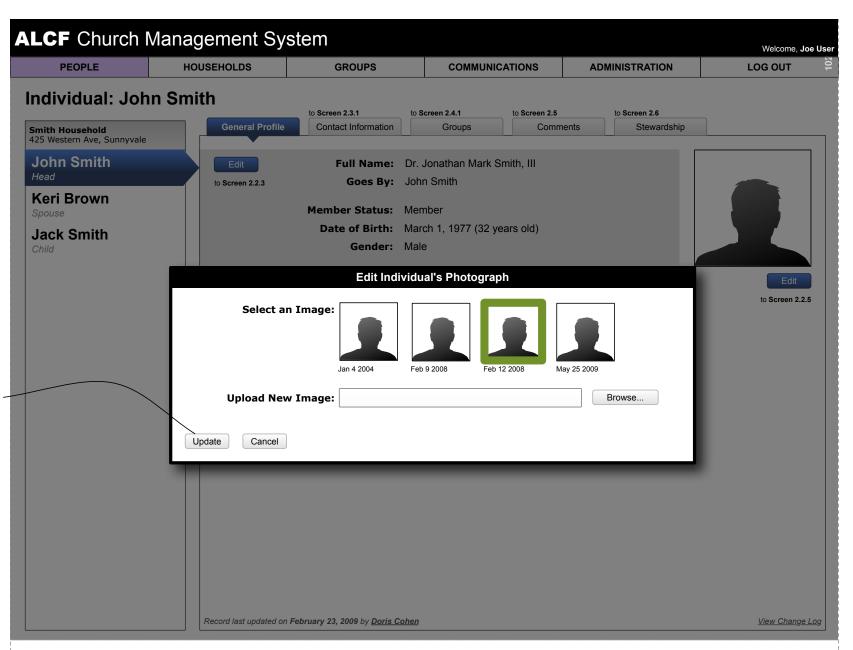
#### ALCF Church Management System IA Membership Subsystem 2.2.6 Edit Individual, Photograph

#### Edit an Individual - Photograph

This screen allows a user to edit an individual's photograph. The user can either select one from a set of previously loaded images, or the user can upload a new one.

Dates listed are the dates the photo was uploaded to the system.

**Update** will set the new image will close the window (taking the user back to where he or she came from) .



#### ALCF Church Management System IA Membership Subsystem 2.3.1 View an Individual, Contact Information

# View an Individual – Contact Information Tab Household

This screen shows all the various contact informations for this Individual, both through his/her household (e.g. home phone and home address) as well as individual contact information (e.g. business phone and business address, email, etc.)

The **Add New** button is used to add a new current home address for the household — in essence, it's to be used when the household is reporting a move to a new house.

Clicking on any of the addresses allows the user to edit the address information — but it's primarily to be used to edit/fix mistakes. If a new address is to be reported (e.g. due to a move), the **Add New** button should be used instead, so that old/historic home address information can be kept in the system.

Clicking on any address or the **Add New** button will redirect the user to **Screen 2.3.2**.

Clicking on **Set as Current** will simply relabel the address as the "Current Home" address. Any "Current Home" address will be set as a Previous Home address.

For multi-person households, changes will apply to all members of the household.

Clicking on any address in "other addresses" or the Add New button will redirect the user to Screen 2.3.3

Address Types for "other addresses" can be:

- Current Work
- · Previous Work
- Previous Home (only for individuals who are in at least one multi-person household)
- Temporary
- Other

Clicking on non-home telephone or the **Add New** button will redirect the user to **Screen 2.3.4**.

Note: for members that are part of a household, the only way to edit/add/remove a Home phone is to go through the "Home Address and Phone for the Smith Household" at the top of the page (e.g. through Screen 2.3.2)

Telephone Types for "Phone Information" can be:

- Home (only editable via Screen 2.3.2)
- Mobile
- WorkFax
- Other

Only one phone can be set as "Primary".

Clicking on email address or the Add New button will redirect the user to Screen 2.3.5.

Clicking on any "Other Contact" or the Add New button will redirect the user to Screen 2.3.6.

Note: Addresses will either have up to four "address" lines and/or can support international addresses, institutions, military addresses, etc.

ChMS Main IA.graffle Thu Feb 04 2010 Page 14 of 55



# **ALCF** Church Management System

o Screen 2.2.1

General Profile

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

Groups

# Individual: John Smith

**Smith Household** 425 Western Ave, Sunnyvale

# John Smith

Keri Brown

Spouse

**Jack Smith** 

Child

# Home Address and Phone for the Smith Household

Current Zip Code Address City/State Home Phone INVALID Current Home 425 Western Ave 94086 408-555-1212 Sunnyvale, CA 123 Main Street, Apt. #3 Palo Alto, CA 94011 650-555-1212 [set as current] [set as current] 1852 Mary Ave Sunnyvale, CA 94087 408-421-1725

to Screen 2.5

Comments

## Other Addresses for John Smith

Contact Info

Address Type Address City/State Zip Code Current Work 401 El Camino Real Mountain View, CA 94043 Temporary 818 Third Street San Francisco, CA 94107 (Until March 4 2004) Previous Home 2811 Hillsdale Road, Apt. #412 Hillsdale, CA 94401 Previous Work 801 Canal Street, Suite #27A Redwood City, CA 94402

to Screen 2.3.6

Add New

# **Phone Numbers for John Smith**

_	Primary?	Phone Type	Phone Number
	Primary	Home	408-555-1212
	[set as primary]	Home	408-281-2381
	[set as primary]	Mobile	415-552-9138
	[set as primary]	Work	650-228-1248
	[set as primary]	Work	650-228-1200
	[set as primary]	<u>Other</u>	626-291-2481

# **Other Contact Information**

_	Contact Type	Value
	AIM Screen Name	<u>jsmith48421</u>
	Facebook ID	<u>28410241</u>
	Twitter Account Name	john_smith_4_17
	Yahoo! Messenger Name	jsmith1231

# **Email Addresses**

to Screen 2.6

Stewardship

Primary? Email Address

Primary john\_smith@gmail.com

[set as primary] ismith1231@yahoo.com

[set as primary] john.f.smith@company.org

## **Mailing Address**

Current Home (425 Western Avenue)

Stewardship Receipt Address
Current Work (401 El Camino Real)

## **Contact Preferences**

- · Okav to Mail
- · Okay to Email
- NOT Okay to Telephone

to Screen 2.3.7

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

to Screen 2.9

Attributes

Add New

to Screen 2.3.2

to Screen 2.3.3

to Screen 2.3.5

Add New

Add New

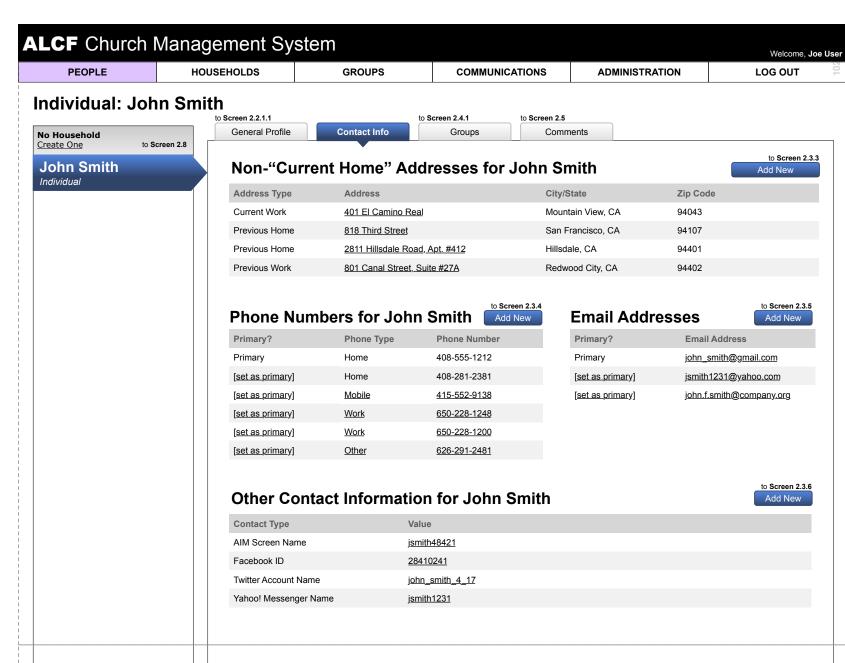
ALCF Church Management System IA Membership Subsystem 2.3.1.1 View an Individual, Contact Information, No Household

View an Individual - Contact Information Tab

See Screen 2.3.1 for more information.

This screen is used for individuals who have NO household. They cannot have a current home address defined without creating or assigning a household record.

They can have other addresses (work, mailing, other, etc.) defined, and they can have a Home phone defined.







ALCF Church Management System IA Membership Subsystem 2.3.2 Edit Individual, Household Address and Phone

Edit an Individual – Household Address and Phone

This dialog box allows the user to add a new or edit an existing Household home address and phone. This is to be used by all individuals, regardless of household status.

If the individual is in just one, single-person household, then the dialog box title would say "Edit Individual Home Address and Phone".

#### Options are:

- Current Home Address
- · Previous Home Address

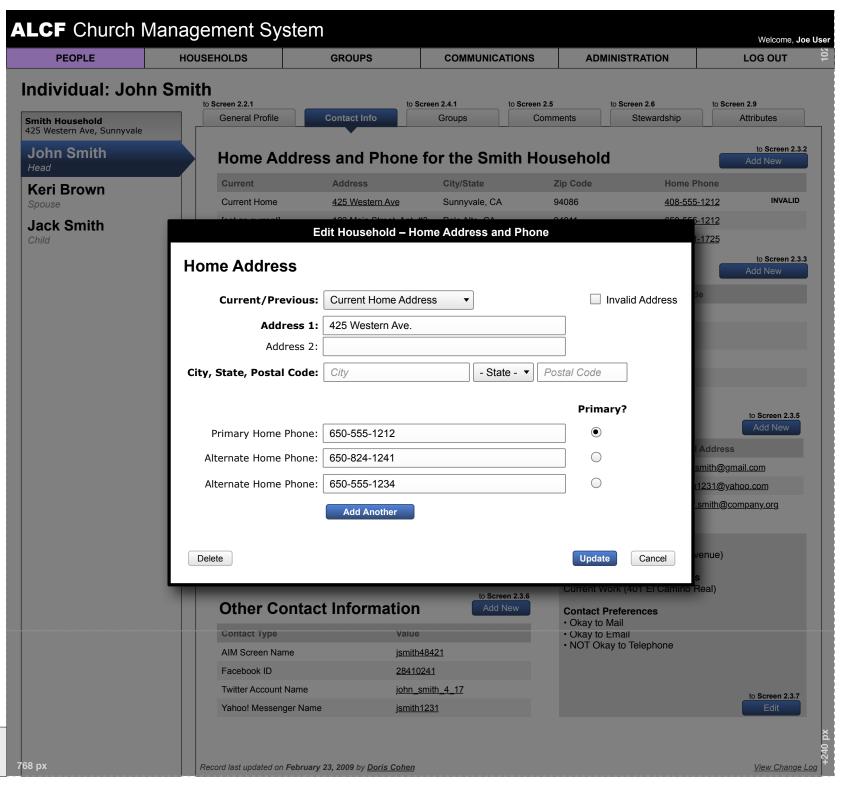
The concept of an "Invalid Address" is only applicable on Current addresses.

If this address being edited is either new or not current, and if the user selects this to be a Current Home Address, upon clicking **Update** the user will first be warned "You are about to save a new Current Home Address. This will set the current home address to being a "previous home address". Are you sure you want to continue?"

If the address being edited is current, then the Current/Previous drop-down and the Delete button are both grayed-out.

Clicking **Add Another** adds another blank "Alternate Home Phone" textbox to appear.

Clicking **Update** will save the record, while Delete will delete the record. The **Update**, **Delete** and **Cancel** buttons will close the window, redirecting the user back to **Screen 2.3.1**.



ChMS Main IA.graffle Thu Feb 04 2010 Page 16 of 55



ALCF Church Management System IA Membership Subsystem 2.3.3 Edit Individual, Other Address

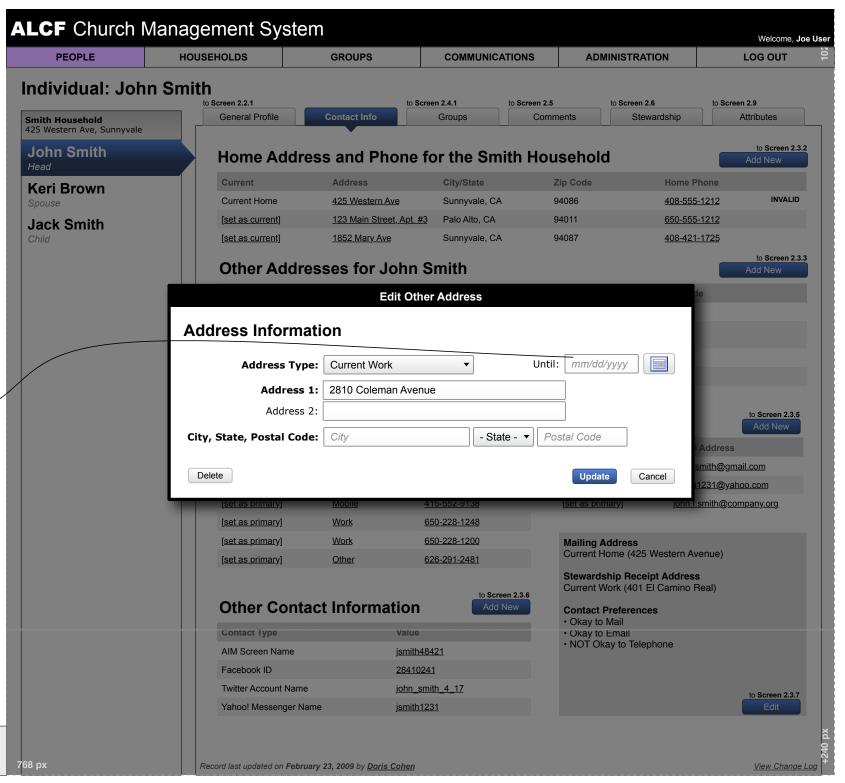
Edit an Individual - Other Address

This dialog box allows the user to add a new or edit an existing "other" address.

See Screen 2.3.1 for address type information.

If selected as "Temporary" then the user has the option to give an "until when" date.

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



ChMS Main IA.graffle Thu Feb 04 2010 Page 17 of 55



ALCF Church Management System IA Membership Subsystem 2.3.4 Edit Individual, Phone Number

#### Edit an Individual - Phone Number

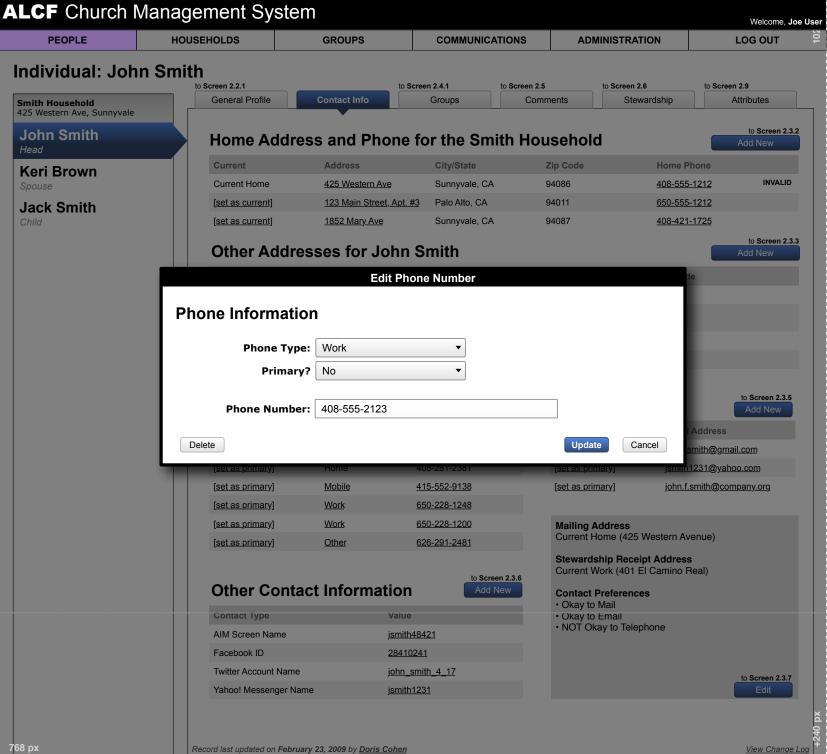
This dialog box allows the user to add a new or edit an existing phone number assigned to this individual. Note that this is only applicable for nonhome phone numbers. Home phone numbers can only be edited through Screen 2.3.2

This dialog box is to be used for all individuals, regardless of household status.

See Screen 2.3.1 for phone type information.

If this phone being edited is either new or not the Primary, and if the user selects this to be the Primary, upon clicking **Update** the user will first be warned "You are about to make this the Primary phone number for this individual. This will cause the current primary to no longer being primary. Are you sure you want to continue?"

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



ChMS Main IA.graffle
Thu Feb 04 2010
Page 18 of 55

ALCF Church Management System IA Membership Subsystem 2.3.5 Edit Individual, Email

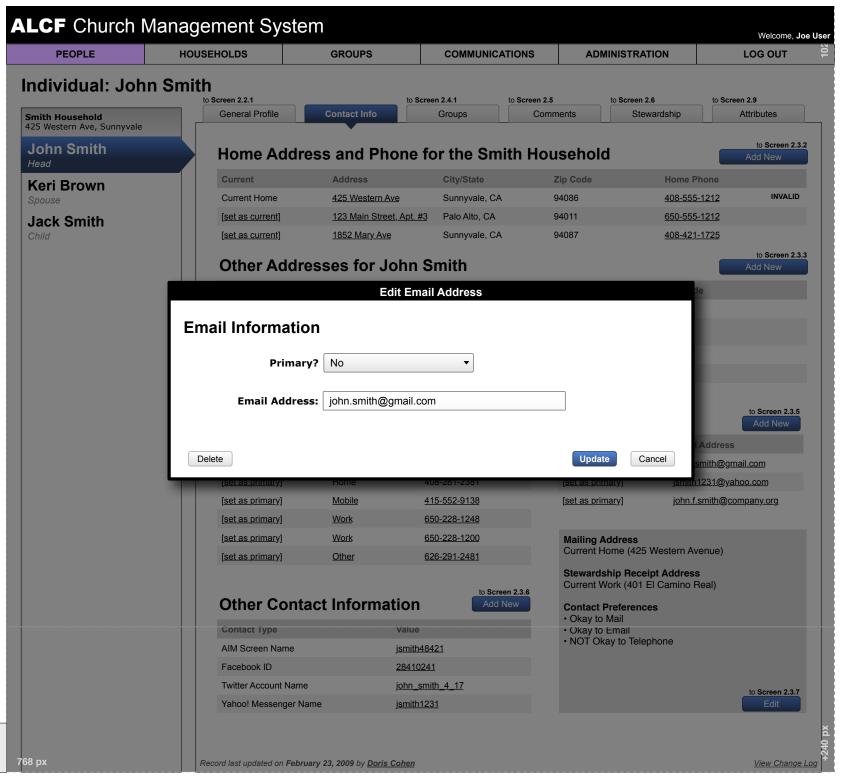
#### Edit an Individual - Email

This dialog box allows the user to add a new or edit an existing email addresses assigned to this individual

This dialog box is to be used for all individuals, regardless of household status.

If the email being edited is either new or not the Primary, and if the user selects this to be the Primary, upon clicking **Update** the user will first be warned "You are about to make this the Primary email address for this individual. This will cause the current primary to no longer being primary. Are you sure you want to continue?"

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



#### ALCF Church Management System IA Membership Subsystem 2.3.6 Edit Individual, Other Contact

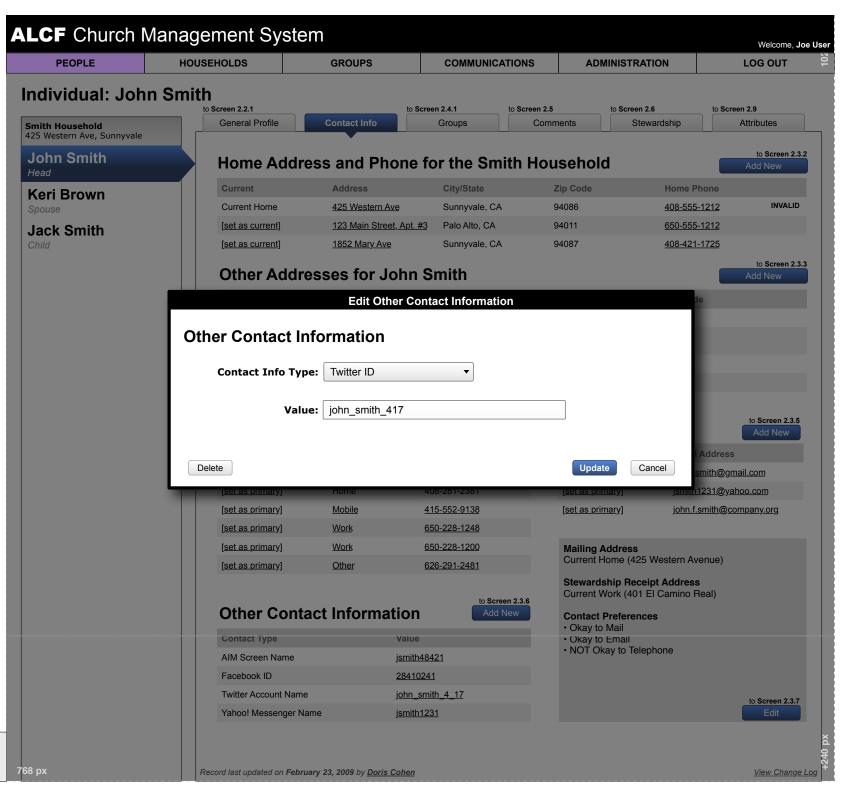
#### Edit an Individual - Other Contact

This dialog box allows the user to add a new or edit an "other contact information" entry assigned to this individual.

This dialog box is to be used for all individuals, regardless of household status.

The list of Contact Info Types is managed/editable by the Admin in the Administration section, **Screen ?.?.?** 

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



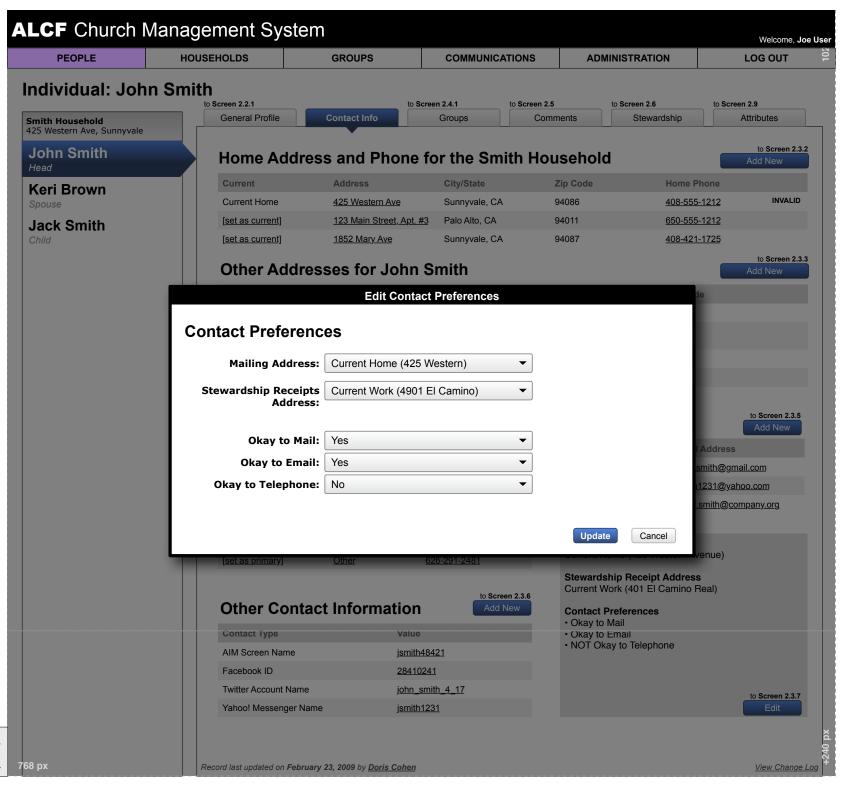
ALCF Church Management System IA Membership Subsystem 2.3.7 Edit Individual, Contact Preferences

Edit an Individual - Contact Preferences

This dialog box allows the user specify the "contact preferences" for this individual.

- "Address" dropdowns can be:
- Current Home
- · Current Work
- Any "Other" addresses defined for the individual
   Any "Temporary" addresses defined for the
- Any "Temporary" addresses defined for the individual
- None
- "Okay to ..." dropdowns can be:
- Yes • No

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



ChMS Main IA.graffle Thu Feb 04 2010 Page 21 of 55



ALCF Church Management System IA Membership Subsystem 2.4.1 View an Individual, Groups

View an Individual - Groups

This screen shows all the ministry groups and communication lists that this individual is a participant of.

Clicking on any of the ministry names will allow the user to edit role(s) and date(s) of involvement for this individual with that ministry on **Screen 2.4.3**.

# **ALCF** Church Management System

to Screen 2.2.1

General Profile

**PEOPLE GROUPS** LOG OUT **HOUSEHOLDS** COMMUNICATIONS ADMINISTRATION

Groups

# Individual: John Smith

Smith Household 425 Western Ave, Sunnyvale

## **John Smith** Head

Keri Brown

Spouse

## **Jack Smith**

Child

# **Ministry Participation**

to Screen 2.3.1

Contact Info

Ministry Role **Dates of Involvement** April 2009 - Present Safari Kids Team Leader May 2007 - September 2008 Growth Groups > Mountain View 2 Member January 4, 2004 - Present Real World Young Adults Small Group Leader September 24, 2007 - May 2008

to Screen 2.5

Comments

to Screen 2.6

Stewardship

# **Communication Lists**

to Screen 2.4.4 Add New

Welcome, Joe User

to Screen 2.9

Attributes

Add New

to Screen 2.4.2

Unsubscribe?	Communication List	List Name
<u>Unsubscribe</u>	Dessert Night Planning Meeting	dessert_night_planning@groups.alcf.net
<u>Unsubscribe</u>	Social Fun Campaign	social_fun@groups.alcf.net
Unsubscribe	IT Team Developers	it_team_devs@groups_alcf_net

ChMS Main IA.graffle Thu Feb 04 2010 Page 22 of 55 An Exciting Fellowship of Growing Believers

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

ALCF Church Management System IA Membership Subsystem 2.4.2 Edit Individual, Ministry Participation,

Edit Individual — Ministry Participation (Add)

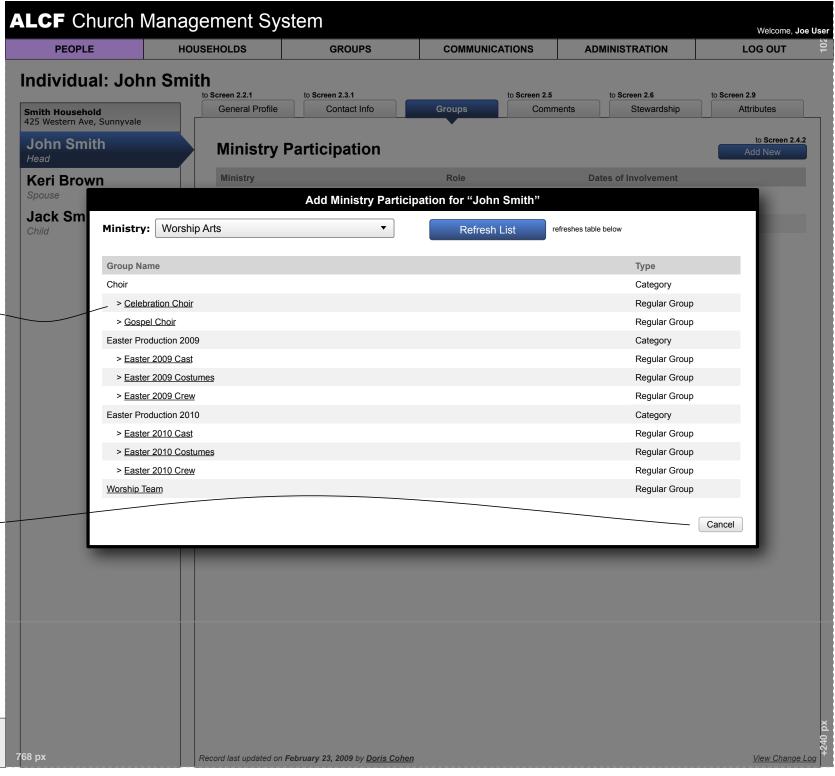
This dialog box is to be used when creating a new ministry participation.

Clicking on any Group for groups that can have members explicitly assigned to it (e.g. regular groups, growth groups and ad hoc groups) will take the user to **Screen 2.4.3**. For groups that can not have members explicitly assigned to it (e.g. smart groups and category groups), a pop up error message will be displayed explaining why.

Clicking on Cancel will close the dialog box, essentially taking the user to **Screen 2.4.1**.

ChMS Main IA.graffle Thu Feb 04 2010 Page 23 of 55

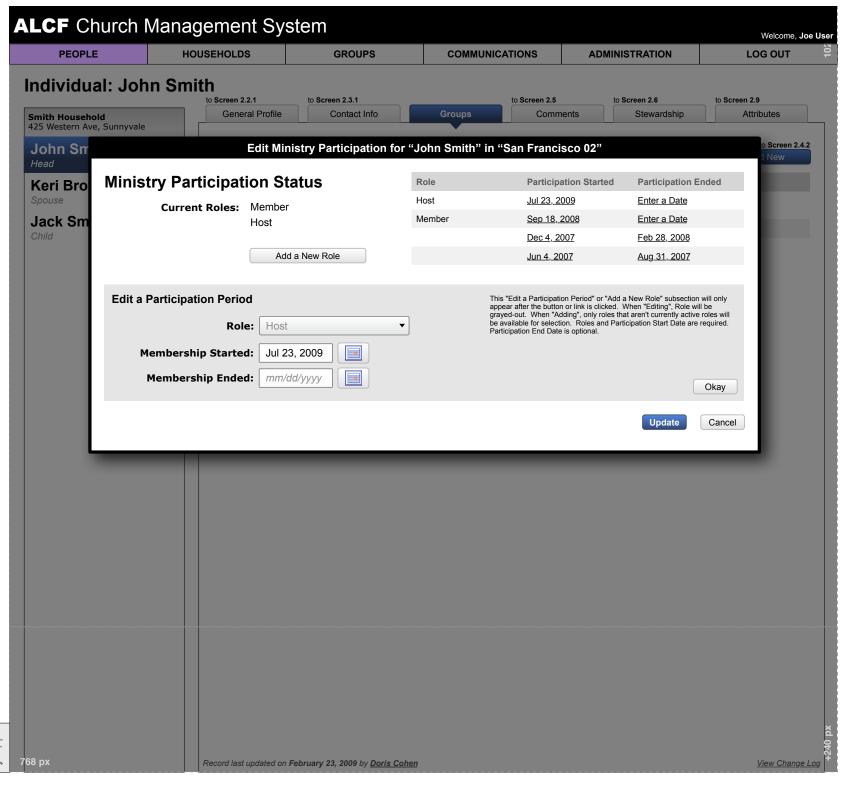
An Exciting Fellowship of Growing Believers



ALCF Church Management System IA Membership Subsystem 2.4.3 Edit Individual, Ministry Participation

Edit Individual — Ministry Participation

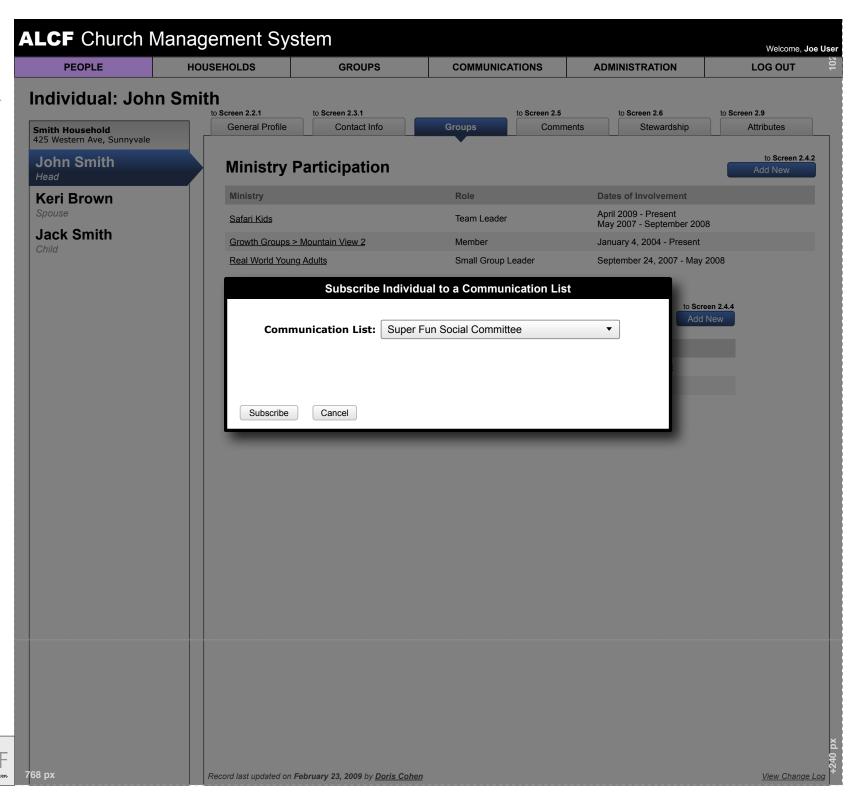
This dialog box is to be used when editing an existing ministry participation or in creating a new one.



ALCF Church Management System IA Membership Subsystem 2.4.4 Edit Individual, Communication List

Edit Individual — Communication List

This dialog box is to be used to subscribe this individual to a Communication List (e.g. email list).



#### ALCF Church Management System IA Membership Subsystem 2.5 View an Individual, Comments

#### View an Individual - Comments

This screen shows all the staff, general and pastor comments for this individual.

There are three levels of comment privacy:

- Confidential can only be viewed by pastors and executive staff members
- Staff Comments can be viewed by any ALCF staff member
- General Comments can be viewed by anyone with access to the ChMS, including lay ministry leaders

List of categories can be edited by the ChMS Administrator and will include categories like:

- Membership
- · Ministry Involvement
- Benevolence
   Other
- "Posted By" filter will only list the names of users who have posted a comment on this individual.
- "Privacy Level" filter will be any of the levels of comment privacy that this user is allowed to see.
- "Edit" is only available for comments that the user has actually entered — no one is able to edit a comment that they didn't enter. Clicking on "Edit" brings up a similar dialog box to that in **Screen** 2.5.1

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

Groups

# Individual: John Smith

## Smith Household 425 Western Ave, Sunnyvale

# John Smith

.....

## Keri Brown

Spouse

## **Jack Smith**

Child

# Comments and Notes

to Screen 2.3.1

Contact Info

to Screen 2.2.1

General Profile

- View All -

# Filter by Posted By: Filter by Privacy Level: Filter by Category:

- View All - ▼

Comments

to Screen 2.6

Stewardship

VIC	77 7 (1)		VICW7 III		VICWI
Edit	Posted By	Date	Privacy Level	Category	Comment
[Edit]	Dixie Campbell	2002-01-24	Staff	Benevolence	Vivamus justo. Curabitur nec elit at justo mollis sollicitudin.
[Edit]	Alyssa McNamara	2003-01-20	General	Benevolence	Nulla facilisi. Suspendisse potenti. Phasellus au Suspendisse pharetra.
[Edit]	Hester McDonnell	2003-07-22	Confidential	Membership	Pellentesque eu sem. Proin nec nunc in magna placerat tincidunt. Sed iaculis ligula sit amet nulla Vivamus.
[Edit]	Clark Parker	2004-05-17	Staff	Ministry Involvement	Ut vitae turpis. Praesent sem nisi, malesuada et, blandit quis, consectetur a, nisi. Nunc ante nisi, fringilla id, rhoncus ut, laoreet at, orci. Aenean eg magna eget massa congue egestas. Aenean ege magna eget massa.
[Edit]	Delbert Kim	2004-08-16	General	Ministry Involvement	Donec vel orci. Nulla iaculis, tortor non tristique tempus.
[Edit]	August McDermott	2005-06-10	Confidential	Membership	Aliquam vitae libero. Proin venenatis nisl nec ero Nulla aliquet tincidunt risus. Pellentesque vitae a Ut elementum dapibus lacus. Vestibulum et est in nibh portitior interdum. Curabitur in neque. Sed egestas. Aliquam ultricies accumsan urna. Aene suscipit metus.
[Edit]	Wayne Bailey	2007-11-13	Confidential	Benevolence	In euismod massa condimentum nisi. Nullam neurna ac mi hendrerit tempus. Aliquam vitae libero Vestibulum arcu purus, sollicitudin hendrerit, phar in, accumsan ac, ipsum. Praesent a dui non velit eleifend euismod. Aliquam tortor. Vestibulum tincidunt nisl sit amet nulla.
[Edit]	Chuck Higgins	2009-07-04	Staff	Benevolence	Aenean eget magna eget massa congue egestas Duis facilisis, ante non vehicula venenatis, risus la sagittis arcu, ut pretium turpis nunc ut tellus.
[Edit]	Lilybell Parker	2009-10-20	General	Benevolence	Quisque at odio. Ut vitae turpis. Proin pretium ci ipsum. Proin tempor. Donec et augue. Quisque ligula sit amet tellus hendrerit dictum. Suspendis: potenti. Cras sit amet tortor vitae purus ultricies feugiat. Maecenas sed uma. Aenean purus. Ut.
[Edit]	Fran Donnelly	2009-11-30	Confidential	Other	Aliquam vitae libero. Sed nec augue et turpis tincidunt accumsan. Quisque at ligula sit amet.

ChMS Main IA.graffle
Thu Feb 04 2010
Page 26 of 55

An Excher Fillow-tipe of Growing Believers

40 px

Record last updated on February 23, 2009 by Doris Cohen

Welcome, Joe User

to Screen 2.9

Attributes

Add New

to Screen 2.5.1

ALCF Church Management System IA Membership Subsystem 2.5.1 Edit Individual, Comments

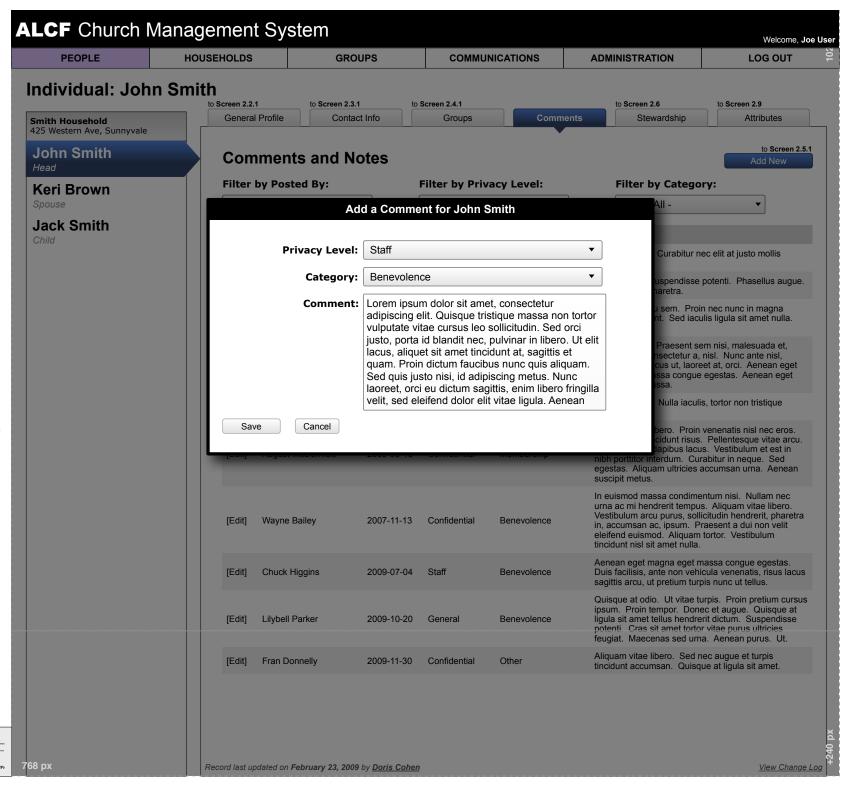
#### Edit an Individual - Comments

This dialog box allows the user to create a new comment, or to edit one of the user's existing comments

A user can only edit his/her own comment.

**Privacy Level** dropdown is limited to the comment types that the user is allowed to see. See Screen 2.5 for more information on **Privacy Level** as well as **Category**.

After hitting Save or Cancel, the user is taken back to **Screen 2.5**.



#### View an Individual - Stewardship

The entire Stewardship section (e.g. everything under 2.6.x including this 2.6 screen) can only be viewed by folks in the Stewardship team. There will be a special permission that is required in order for a user to be able to view anything in this section.

Every stewardship item must be associated with one and only one person. Reports (e.g. reports that can be mailed out to the individual) can be run against individuals or against households.

Date Range includes things like "View All", "Year to Date", "Month to Date", etc. See any program like Quicken for an example of date ranges to use.

Funds can be one of the following:

- Tithes/Offering
- Building Fund
- Specific to a Given Ministry
- Scholarship to a Given Event
- · Support for a given individual or cause

List of specific ministries, events, and individuals or causes can be edited by anyone in the Stewardship committee in the Administration section. See Screen ?.? for more information.

In addition to the set list above, individual campaigns and additional funds can be created by anyone in the Stewardship Committee. Examples of additional funds include:

· Imagine Campaign

Transaction Types can be one of the following:

- · Check (needs a check #)
- Credit Card (Online) · Credit Card (Recurring)
- · Corporate Match (Pre-Taxed)
- · Corporate Match (Post-Taxed)
- Stock Donation
- Car/Automobile

Note that any pre-tax Corporate Match contribution should NOT be calculated in receipts used for taxdeductible purposes.

All transactions also have an internal "notes" or "comments" type of field, which can be edited and viewed only by folks in the Stewardship committee.

Clicking on any Check # will pop up a graphic with the check image. See dialog box in Screen 2.6.2

Clicking on any Date will pop up a dialog box similar to that in Screen 2.6.1 allowing the user to edit or even delete the transaction

## Questions:

- · Do we need to deal with Anonymous contributions? How are those to be handled?
- · Do we ever need to "flag" a given transaction (to be looked into at a later time)

ChMS Main IA.graffle Thu Feb 04 2010 Page 28 of 55



# **ALCF** Church Management System

**PEOPLE** HOUSEHOLDS **GROUPS** COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

Filter by Fund:

- View All -

Groups

# Individual: John Smith

**Smith Household** 425 Western Ave, Sunnyvale

## **John Smith** Head

Keri Brown

Spouse

Jack Smith

Child

# **Stewardship**

General Profile

**Date Range:** 

- View All -

to Screen 2.3.1

Contact Info

to Screen 2.2.1

entries given the specified filtering criteria.

to Screen 2.5

Prints a report of the list of transaction

Comments

Filter by Transaction Type:

**View Entire Household:** 

to Screen 2.9

Attributes

Add New

to Screen 2.6.1

Welcome, Joe User

- View All -✓ View contributions by all household members

Print Report

Stewardship

DATE v	Contributor	Fund	Transaction	Contributed	Cleared
2001-03-22	Jack Smith	Ministry > Student Ministries	Credit Card (Online)	\$31.01	\$25.00
2001-08-24	Jack Smith	Ministry > Student Ministries	Corp. Match (Pre-Tax)	\$333.89	\$333.89
2001-11-10	John Smith	Ministry > Safari Kids	Cash	\$976.54	\$976.54
2001-12-29	John Smith	Tithes/Offering	Credit Card (Online)	\$995.02	\$945.28
2002-11-16	John Smith	Ministry > Student Ministries	Check <u>#2141</u>	\$763.91	\$763.91
2003-08-28	Keri Brown	Ministry > Benevolence	Corp. Match (Pre-Tax)	\$409.72	\$409.72
2003-09-04	Jack Smith	Ministry > Benevolence	Cash	\$260.54	\$260.54
2003-11-24	Jack Smith	Imagine Campaign	Cash	\$994.58	\$994.58
2004-07-29	Keri Brown	Ministry > Safari Kids	Corp. Match (Post-Tax)	\$802.85	\$802.85
2004-08-13	Keri Brown	Imagine Campaign	Check <u>#2251</u>	\$307.21	\$307.21
2004-10-07	Jack Smith	Ministry > Safari Kids	Check <u>#2376</u>	\$555.35	\$555.35
2005-10-20	John Smith	Scholarship > 2010 Marriage Retreat	Credit Card (Online)	\$268.17	\$244.25
2005-10-23	Jack Smith	Scholarship > 2010 Marriage Retreat	Check <u>#2399</u>	\$742.62	\$742.62
2005-12-13	John Smith	Ministry > Benevolence	Corp. Match (Pre-Tax)	\$778.54	\$778.54
2006-01-13	Keri Brown	Scholarship > 2010 Marriage Retreat	Credit Card (Online)	\$274.73	\$251.23
2006-09-22	Keri Brown	Support > Keith Blackford	Check <u>#2462</u>	\$733.11	\$733.11
2008-03-07	Keri Brown	Ministry > Safari Kids	Stock Donation	\$473.41	\$473.41
2008-11-28	Jack Smith	Scholarship > 2009 Ninja Camp	Check #2498	\$982.38	\$982.38
2008-12-29	Keri Brown	Ministry > Student Ministries	Corp. Match (Pre-Tax)	\$502.22	\$502.22
2009-03-29	Jack Smith	Tithes/Offering	Credit Card (Online)	\$270.53	\$250.23

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

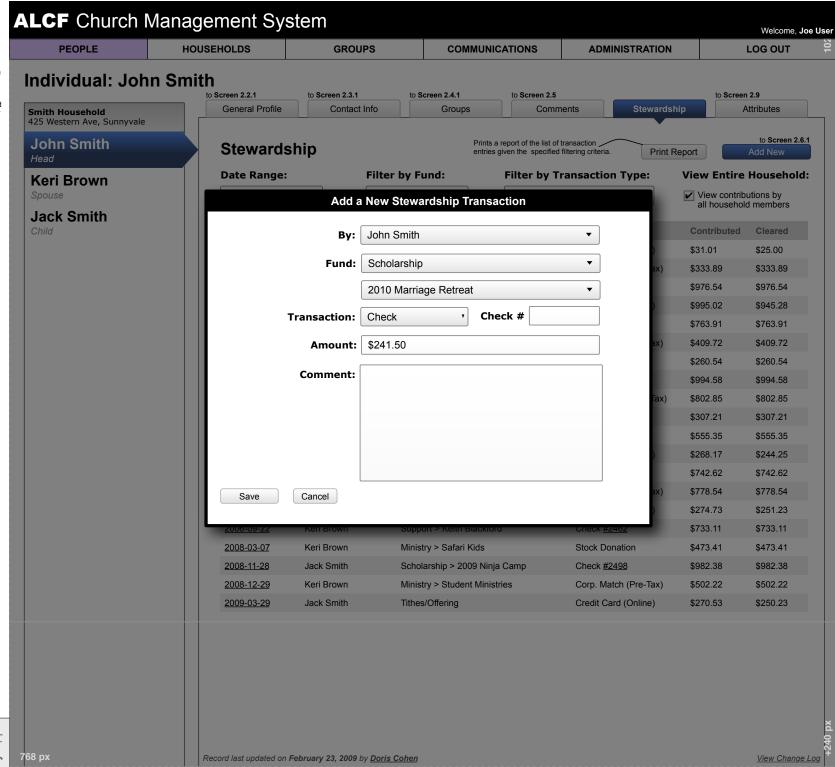
ALCF Church Management System IA Membership Subsystem 2.6.1 Edit Individual, Stewardship

#### Edit Individual - Stewardship

This dialog box allows the user to view, edit or even delete a transaction.

Note that transactions are never actually deleted from the database. A transaction is simply removed from view, and a transaction log will record the user that deleted the transaction.

Funds that have a "sub fund" type (e.g. ministry, scholarship and support) will be required to have the sub fund type specified in a second drop down.



#### ALCF Church Management System IA Membership Subsystem 2.7 Merge Individuals, Find

## Merge Individuals, Find

The first step in merging two individuals records together is to find the individual record to merge with. This screen is for the user to select the individual to merge with.

Suggested individuals (based on common names, contact information, etc.) is up top. "Search All" type functionality is below.

Clicking on any name will redirect the user to **Screen 2.7.1**.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

# Merge Individuals: "John Smith"

John Smith Household, 241 Main Street, Sunnyvale

Please select an Individual record to merge with "John Smith". The system suggests the following Individuals, or you can search for a different individual below.

First Name	LAST NAME v	Membership Status	Address	<u>Cit</u> y
<u>Jonathan</u>	Bubba-Smith	Non-Member	41098 Mill Valley Way	Anderson
<u>Joe</u>	Smith	Non-Member	1040 La Canada Flintridge Dr.	Hercules
<u>Jon</u>	<u>Smith</u>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
<u>Jonna</u>	<u>Smith</u>	Non-Member	31558 Kerman Blvd.	East Palo Alto

# Search / Filter List First Name Last Name - View All Statuses - Refresh List refreshes table below

Results: Viewing people 1-20 of 2141.

First Name	LAST NAME v	Membership Status	Address	<u>Cit</u> y
<u>Page</u>	Alexander	Non-Member	41098 Mill Valley Way	Anderson
Silvanus	<u>Barry</u>	Non-Member	1040 La Canada Flintridge Dr.	Hercules
<u>Susy</u>	<u>Barry</u>	Non-Member/Tithe	76207 Walnut Ave.	Irwindale
Walden	<u>Barry</u>	Non-Member	31558 Kerman Blvd.	East Palo Alto
<u>Benedict</u>	<u>Bennett</u>	Member	30811 Palm Springs Road	Bell
<u>Dandy</u>	<u>Brooks</u>	Member	88436 Mountain View Road	Commerce
<u>Burleigh</u>	<u>Buckley</u>	Non-Member	54019 Industry Ave.	Capitola
Bass	<u>Burke</u>	Non-Member/Tithe	59216 Reedley Dr.	Antioch
<u>Amorita</u>	Chang	Member	30200 Elk Grove St.	Agoura Hills
Worthington	Coleman	Non-Member/Tithe	25835 Emeryville Blvd.	Hillsborough
<u>Lula</u>	Collins	Non-Member	80939 Canyon Lake Dr.	Colton
Minna	Cook	Member	2279 Sonora Road	Lakeport
<u>Tilda</u>	Cullen	Non-Member	83531 Chico Blvd.	Biggs
Russell	Cunningham	Member	54957 Hughson Way	Laguna Niguel
<u>Abbie</u>	<u>Davis</u>	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
Mortio		N. N. I. (T)	33924 Fullerton St.	La Mesa
Martie	<u>Davis</u>	Non-Member/Tithe	33924 Fullerion St.	La Mesa
Toinette	<u>Davis</u> Davis	Member Member	41077 Dorris Dr.	Truckee

Welcome, Joe User

#### ALCF Church Management System IA Membership Subsystem 2.7.1 Merge Individuals, Reconcile Data

#### Merge Individuals, Reconcile Data

The second step in merging two individuals records together is to reconcile all disparate pieces of data for both individuals. The system will automatically include any data points that are the same on both individual records. For any data points that are different, the user will need to manually select which record is the "right" one, if any.

Note that comments, stewardship data, group and communications list membership, email addresses, and other contact info (e.g. AIM, Twitter, etc.) will automatically be merged, saving all non-duplicate

TODO: Other things to consider include Name, stewardship data, group/ministry participation, contact lists, etc.

## **ALCF** Church Management System **PEOPLE HOUSEHOLDS GROUPS** COMMUNICATIONS ADMINISTRATION

# Welcome, Joe User LOG OUT Merge Individuals: "John Smith" **Jonathan Smith** John Smith 202 Long Drive, San Francisco 202 Longg Street, San Francisco Households ✓ 202 Long Drive, San Francisco 202 Longg Street, San Francisco with Karen Jones-Smith, Samantha Jones-Smith with Karen Smith **Addresses** Current Work □ Previous Work 2180 Salley Street, Mountain View 122 Main St, Palo Alto ✓ Previous Work 122 Main Avenue, Palo Alto **Phone** Mobile - (415) 555-1212 Mobile - (415) 551-5121 Work - (415) 555-1234 Membership, Family, Biographical Married to Karen Smith since 1/21/2004 Married Birthday: Feb 11, 1977 Birthday: Feb 11 Member since July 2, 2008 Non-Member



Merge

Cancel

ChMS Main IA.graffle

ALCF Church Management System IA Membership Subsystem 2.8 Edit Individual, Join a Household

Edit Individual, Join a Household

This screen is to select or create a new household for this individual to join.

Next takes the user to Screen 2.8.1 Cancel takes the user back to the appropriate Screen 2.2.x.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Join a Household: "John Smith"

# **Home Address**

Address 1: 425 Western Ave.

Address 2:

City, State, Postal Code: City - State - ▼ Postal Code

Primary Home Phone: 650-555-1212

Alternate Home Phone: 650-824-1241

Alternate Home Phone: 650-555-1234

Add Another

Next

Cancel

Welcome, Joe User

ALCF Church Management System IA Membership Subsystem 2.8.1 Edit Individual, Join Household, Reconcile

Edit Individual, Join a Household, Ensure Unique

The system will attempt to find any similar/close matches to the home address and phone information provided from **Screen 2.8**, and will display "close matches" to the user in order to minimize duplicates.

Clicking on any of the links will associate this person as a member of the household selected and will take the user to **Screen 3.2** for the household.

Clicking on **None Found...** will create the new household entry and take the user to **Screen 3.2** for the new household.

Clicking on **Back** will take the user back to **Screen 2.8** with the existing data typed in.

Clicking on **Cancel** will take the user back to the appropriate **Screen 2.2.x**.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

# Join a Household: "John Smith"

425 Western Ave., Sunnyvale, CA 94048

Does the household match any of the already-existing households listed below? And are the members of that household in the same family unit as John Smith? If so, please select the household that it matches.

Otherwise, click on "None Found - Create as a New Household" below.

Please remember that roommates should not and are not considered in the same household.

HOUSEHOLD NAME ∨	Address	City	Members
Allen Household	46618 Port Hueneme Way	Rosemead	Bird Allen, Christy Allen
Anderson Household	44619 Burbank Dr.	Lynwood	Silvester Anderson, Tonie Anderson
Bell Household	22326 Kerman Road	Vista	Shirl Bell, Idaline Bell
Bell Household	52680 Gilroy Road	Mendota	Adalia Bell, Narda Bell, Halsey Bell, Ivar Bell
Brennan Household	37987 Redding Ave.	El Cajon	Cyril Brennan, Roderick Brennan
Browne Household	37956 Firebaugh Ave.	Culver City	Delia Browne, Bram Browne, Cleopatra Browne, Berton Browne
Bryant Household	4005 Lakeport Dr.	Laguna Niguel	Bethany Bryant, Dominique Bryant, Pierce Bryant, Jessy Bryant
Burke - Individual	52229 Moraga Road	Fremont	Sandy Burke

None Found – Create as a New Household

Back

Cancel

Welcome, Joe User

An Exciting Fellowship of Growing Bolievers

#### ALCF Church Management System IA Membership Subsystem 2.9 View an Individual, Attributes

#### View an Individual - Attributes

Attributes are any other fields that ministries or other users may want to track for an individual, including things like:

- Date Accepted Christ
- Date of Baptism
- Spiritual Gifts
- Vocational Gifts
- Baptized at ALCF?
- · Previous Church Membership

Each attribute can only by entered in once. But attributes can be edited.

Attribute "Types" include:

- Date w/ Year Optional
- · Strict Dropdown (Single-Select)
- Flexible Dropdown (Single-Select) Strict Dropdown (Multiple-Select)
- Flexible Dropdown (Multiple-Select)
- Checkbox (e.g. a aimple "Yes" or "No")

The system is intended to be completely extensible -- new attribute fields can be added relatively easily by the ChMS Administrator.

Any of the Edit buttons will take the user to Screen 2.9.1.

# **ALCF** Church Management System

**PEOPLE GROUPS HOUSEHOLDS** COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

# Individual: John Smith



## Keri Brown

Smith Household

Spouse

## **Jack Smith**

Child

# **Attributes**

General Profile

to Screen 2.2.1

Date Accepted Christ: January 1997

to Screen 2.3.1

Contact Info

Edit

Spiritual Gifts: Healing, Prayer

Edit

Ministry Consultation Guide: Chris Warren

Edit

Ministry Consultation Date: February 5, 2005

Edit

ChMS Main IA.graffle Thu Feb 04 2010 Page 34 of 55 An Exciting Fellowship of Growing Believers

Welcome, Joe User

**Attributes** 

Add a New Attribute

to Screen 2.9.2

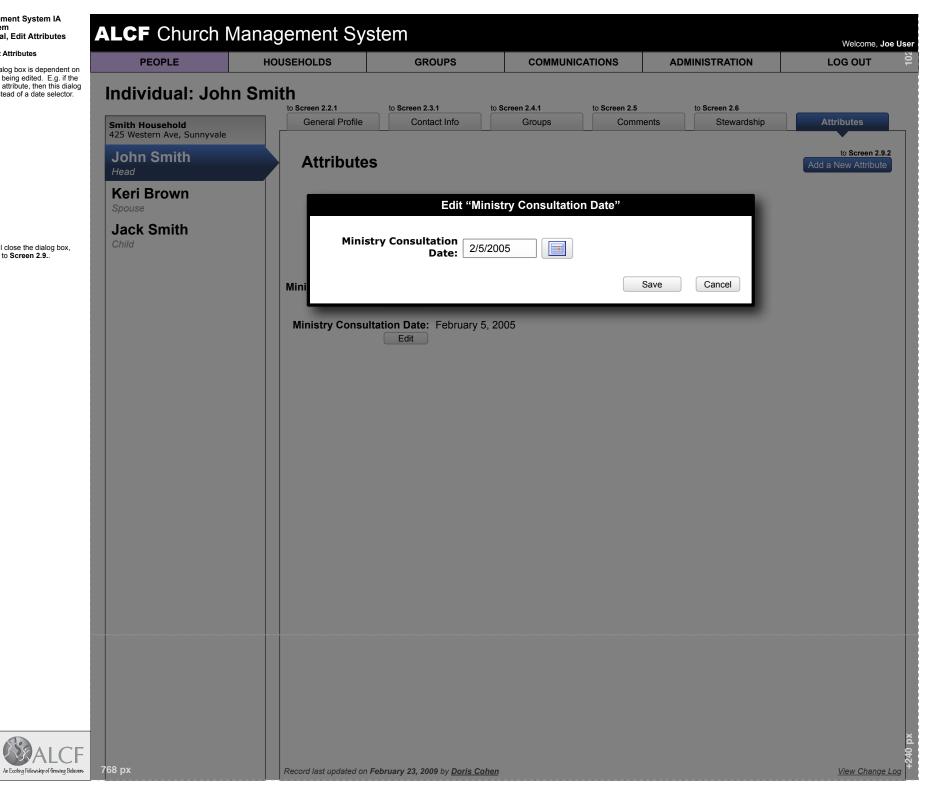
ALCF Church Management System IA Membership Subsystem 2.9.1 View an Individual, Edit Attributes

View an Individual - Edit Attributes

The exact layout of this dialog box is dependent on the type of attribute that is being edited. E.g. if the type of attribute is a "Text" attribute, then this dialog box will have a textbox instead of a date selector.

Both **Save** and **Cancel** will close the dialog box, essentially taking the user to **Screen 2.9.**.

ChMS Main IA.graffle Thu Feb 04 2010 Page 35 of 55



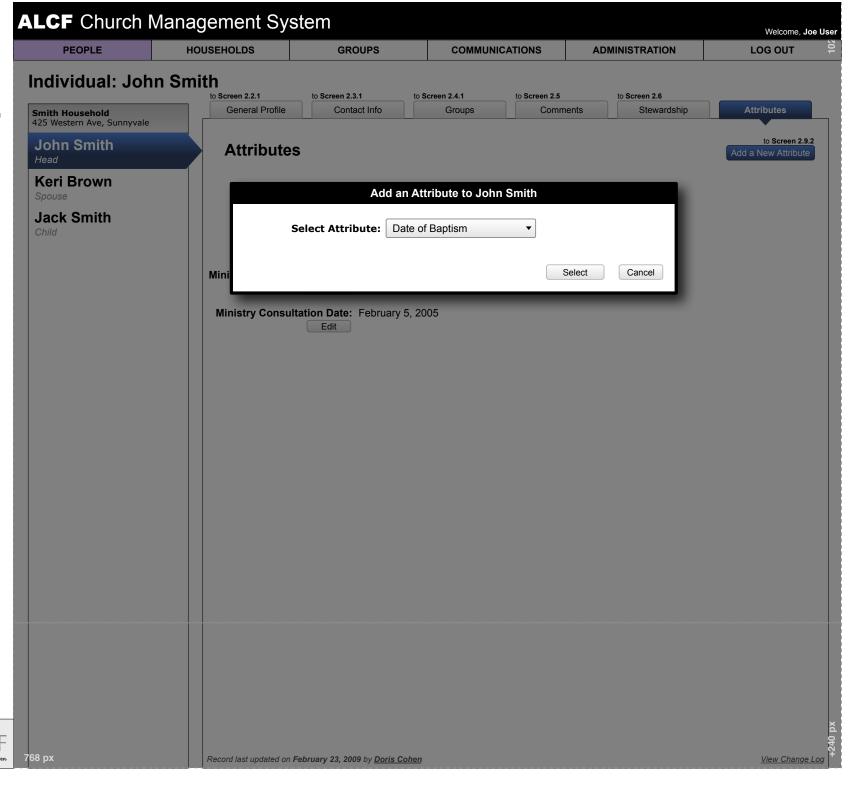
ALCF Church Management System IA Membership Subsystem 2.9.2 View an Individual, Add an Attribute

View an Individual - Add an Attribute

The list of available attributes is managed by a ChMS Administrator – see **Screen 2.9** for more notes on other attributes.

After selecting an Attribute, the user is taken to **Screen 2.9.1** for that attribute.

Cancel will close the dialog box, essentially taking the user to Screen 2.9.



### ALCF Church Management System IA Membership Subsystem 3.1 Search Households

#### Search for a Household

This allows the user to search for an a specific household in the ChMS.

A household is a family unit that lives in the same address.

Note that roommates (e.g. two friends living in the same apartment) do NOT constitute a single household. If both roommates are single, they would both be in two distinct one-person households that happen to have the same address.

Households must have at least one individual in it.

Individuals may be part of multiple households.

Link will take the user to Screen 3.2 for that household.

# **ALCF** Church Management System

**PEOPLE HOUSEHOLDS GROUPS** LOG OUT COMMUNICATIONS ADMINISTRATION

### Search for a Household

### Search / Filter List Name Refresh List refreshes table below Address - View All Cities -

Results: Viewing households 1-2	20 of 2141.			Previous   Nex
HOUSEHOLD NAME V	Address	City	Members	
Allen Household	46618 Port Hueneme Way	Rosemead	Bird Allen, Christy Allen	
Anderson Household	44619 Burbank Dr.	Lynwood	Silvester Anderson, Tonie Anderson	
Bell Household	22326 Kerman Road	Vista	Shirl Bell, Idaline Bell	
Bell Household	52680 Gilroy Road	Mendota	Adalia Bell, Narda Bell, Halsey Bell, Ivar Bell	
Brennan Household	37987 Redding Ave.	El Cajon	Cyril Brennan, Roderick Brennan	
Browne Household	37956 Firebaugh Ave.	Culver City	Delia Browne, Bram Browne, Cleopatra Browne, Berton Browne	
Bryant Household	4005 Lakeport Dr.	Laguna Niguel	Bethany Bryant, Dominique Bryant, Pierce Bryant, Jessy Bryant	
Burke - Individual	52229 Moraga Road	Fremont	Sandy Burke	
Burns Household	82919 Torrance Blvd.	San Juan Bautista	Alston Burns, Jody Burns, Oxford Burns	
Byrne Household	55209 Aliso Viejo Ave.	Yucaipa	Laurina Byrne, Aiken Byrne	
Campbell - Individual	27444 Point Arena Terrace	Ione	Hester Campbell	
Campbell Household	27772 San Carlos St.	Sausalito	Sylvana Campbell, Kacey Campbell, Benny Campbell, Elin Campbell	
Carter Household	97011 Lakeport Road	Maywood	Daphne Carter, Alexandrina Carter, Hennie Carter	
Chan Household	29180 Ventura St.	Pleasanton	Shaw Chan, Oscar Chan	
Chang Household	27041 Alameda Way	National City	Davy Chang, Aloysia Chang, Romeo Chang	
Clarke Household	12844 Vista St.	Maywood	Becky Clarke, Lucie Clarke, Morrie Clarke	
Clarke Household	86680 Cupertino Way	Bellflower	Ginnie Clarke, Lorelei Clarke, Valora Clarke	
Coleman - Individual	42923 Suisun City Terrace	Rancho Palos Verdes	Mikey Coleman	
Coleman Household	24834 Fowler Blvd.	Morro Bay	Kilby Coleman, Mordy Coleman	
Collins Household	98748 Paso Robles Way	Lodi	Karsten Collins, Milburn Collins	
Cullen Household	32401 Rancho Mirage Terrace	Atwater	Leanne Cullen, Merlin Cullen, Gregg Cullen	
Cunningham Household	54818 Colma Terrace	Ontario	Samson Cunningham, Vernon Cunningham, Aggie Cunningham	

### ALCF Church Management System IA Membership Subsystem 3.2 View Household

#### View Household

See Screen 2.2 on the explanation of positions within rules for a household.

This notice only appears if this household was recently split with another. The link will redirect the user to this same screen for that household.

Clicking on any individual will take the user to Screen 2.2 for that individual.

Interactions to manage home address and phone information matches the interactions from Screen

# **ALCF** Church Management System

PEOPLE **GROUPS HOUSEHOLDS** COMMUNICATIONS

ADMINISTRATION

to Screen 3.3

to Screen 3.4

Add New

Edit Roles

LOG OUT

Welcome, Joe User

Household: John Smith Household

Note: This household was recently split with the **Brown Household** by Doris Cohen on February 23, 2009.

### **Household Members**

Role	Name	Email	Phone
Head	John Smith	jsmith@gmail.com	415-555-1212
Spouse	Keri Brown	kbrown@gmail.com	415-555-2211
Child	lack Smith		

### Home Address and Phone for the John Smith Household

Current	Address	City/State	Zip Code	Home Phone
Current Home	425 Western Ave	Sunnyvale, CA	94086	408-555-1212
[set as current]	123 Main Street, Apt. #3	Palo Alto, CA	94011	650-555-1212
[set as current]	1852 Mary Ave	Sunnyvale, CA	94087	<u>408-421-1725</u>

Add an Individual

to Screen 3.6 Remove an Individual to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

ALCF Church Management System IA Membership Subsystem 3.3 Edit Household, Roles

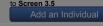
Edit Household - Roles

See **Screen 2.2** on the explanation of positions within rules for a household.

# ALCF Church Management System PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

### Household: John Smith Household





Screen 3.6
Remove an Individual

to Screen 3.7

Split this Househo

to Screen 3.8

ALCF Church Management System IA Membership Subsystem 3.4 Edit Household, Address and Phone

Edit Household - Address and Phone

The interactions here match the interactions from Screen 2.3.2.

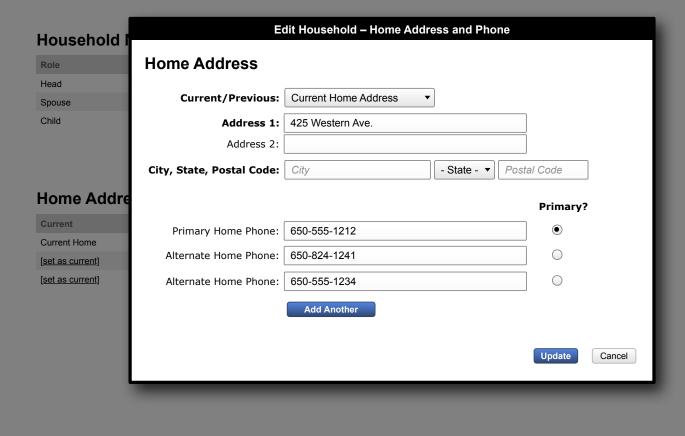
# **ALCF** Church Management System

PEOPLE **GROUPS HOUSEHOLDS** COMMUNICATIONS

LOG OUT **ADMINISTRATION** 

Welcome, Joe User

### Household: John Smith Household



to Screen 3.8

ALCF Church Management System IA Membership Subsystem 3.5 Edit Household, Add Individual

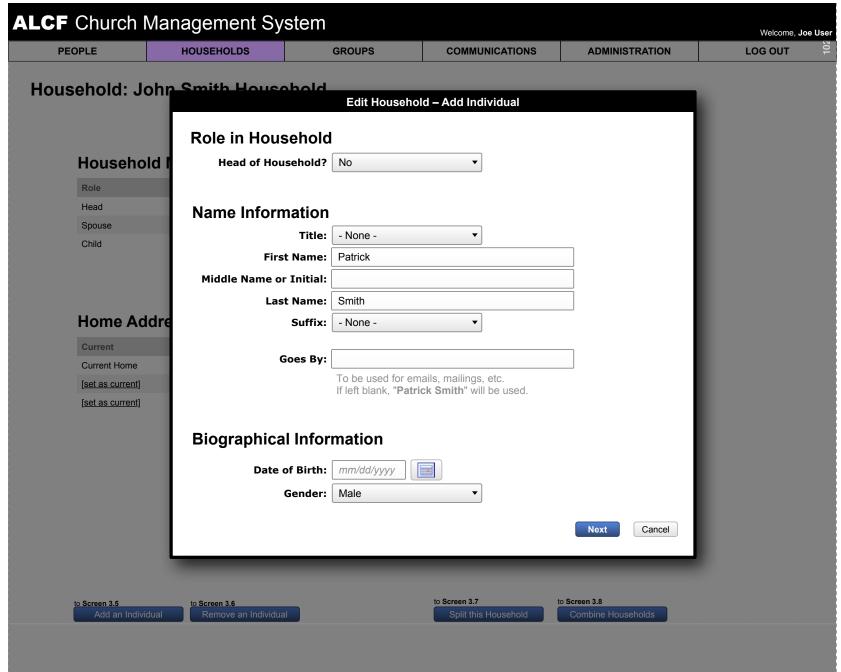
Edit Household - Add Individual

If "Head" is selected, the current Head will be changed to "Other" and this individual will be set as

Upon clicking "Next", the system will search to try

- any similarly-matched names in the system:

  \* If at least one similarly-matched names exists, the
  user will be directed to **Screen 3.5.1**
- \* If no similarly-matched names exist anywhere, then the individual will be created and added to this household and the dialog box will close (redirecting the user back to Screen 3.2)



### ALCF Church Management System IA Membership Subsystem 3.5.1 Edit Household, Reconcile Individual

Edit Household – Reconcile Added Individual

This screen allows the user to attempt to reconcile an added individual to the household with an existing individual in the system, in order to prevent duplicate records.

"Back" will take the user back to Screen 3.5.

"Create..." will create the entry as a new individual and will place the newly created individual into this household. The dialog box will then close and the user will be taken back to Screen 3.2.

"Select" will have the system check to see if the individual is already part of a multi-person household:

\* If yes, then the system will add the individual into this household.

\* If no, then the system will merge the individual's single-person household into this household. Either way, the dialog box will then close and the user will be taken back to **Screen 3.2**.

"Cancel" will close the dialog box the user will be taken back to Screen 3.2.

# **ALCF** Church Management System

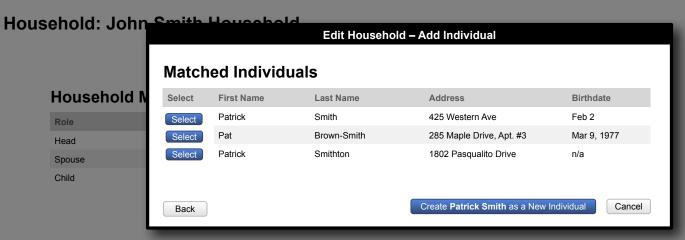
PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Zip Code

94086

94011

94087



### Home Address and Phone for the John Smith Household

City/State

Sunnyvale, CA

Palo Alto, CA

Sunnyvale, CA

Home Phone
408-555-1212
650-555-1212

408-421-1725

to Screen 3.4

to Screen 3.5
Add an Individual

Current

Current Home

[set as current]

[set as current]

Screen 3.6

Remove an Individual

Address

425 Western Ave

1852 Mary Ave

123 Main Street, Apt. #3

to Screen 3.7

to Screen 3.8

#### ALCF Church Management System IA Membership Subsystem 3.6 Edit Household, Remove Individual

#### Edit Household - Remove an Individual

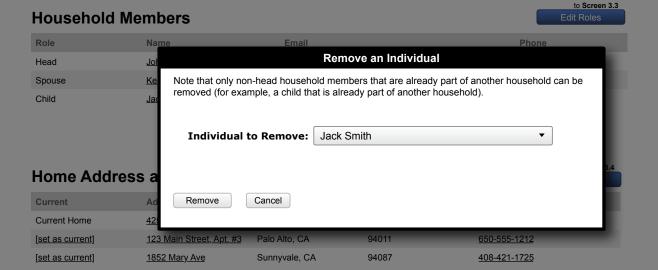
See note in the dialog box about which individuals can be removed.

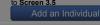
Note that if an individual to be removed does not have any other household, then a dialog box warning/confirmation will appear after this confirming that the individual will no longer have any household data associated with him/her.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

### Household: John Smith Household





Screen 3.6
Remove an Individual

to Screen 3.7
Split this Househol

to Screen 3.8

### ALCF Church Management System IA Membership Subsystem 3.7 Edit Household, Split Households

#### Edit Household - Split Households

This will cause the current household to be split into two separate households.

Note that the head of the current household must stay in this household. Only non-head household members can be split off.

All shared "previous home address" information will be copied over to the new household, and from this point forward they will be managed independently from this household.

The new address will be saved as the current home address for the new household. The current home address will be saved as a previous home address for the new household.

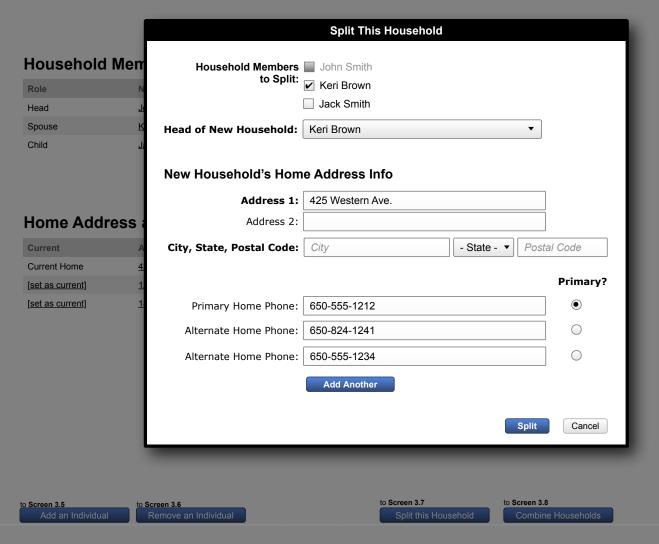
Current home address information for this household will remain unchanged.

After hitting "Spilt", the dialog box will close, redirecting the user to Screen 3.2 for the old household. However, as a convenience a notice of the spil will appear at the top of Screen 3.2 for 2 weeks, with a link to "the other household".

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

### Household: John Smith Household



#### ALCF Church Management System IA Membership Subsystem 3.8 Edit Household, Combine Households

#### Edit Household - Combine Households

This allow two households to be combined, e.g. due to a marriage or changed family/living arrangement. The two households will be combined into a single, combined household.

Note that this should be specifically used when two actual households are being combined in real life. This is *not* to be used to attempt to merge/fix duplicate household records in the database. To merge/fix duplicate records, that should be done at the individual level. See **Screen 2.7** for more on this

Any matching "previous home address" data will be combined together. Any non-matching "previous home address" data will be reassigned to the individual instead of the household. The "current home address" information will become a "previous home address" for each individual in the household being merged in.

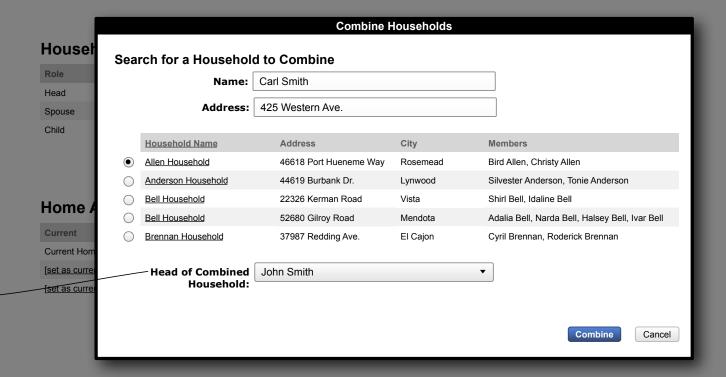
After hitting "Merge", the dialog box will close, redirecting the user to Screen 3.2 for the combined household. If there is any old "Recently Split from..." messaging on either household, that will no longer appear.

The only available choices are the Head of either merged household.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

### Household: John Smith Household



to Screen 3.5
Add an Individ

Remove an Individual

to Screen 3.7

Screen 3.8

#### ALCF Church Management System IA Membership Subsystem 4.1.1 View Groups (WA)

### View Groups - Example for Worship Arts

Groups provide the ability to organize individuals into groups or organizational units. Groups can either be for specific tasks or events (e.g. "Worship Team", "Marriage Retreat 2010 Attendee", etc.), or they can be a ministry in and of itself (e.g. "OASIS", "Real World", etc.).

Groups must belong to at least one or more ministry which oversees the management of the

Groups can have an email alias (e.g. realworld@groups.alcf.net) as well as one or more individuals (e.g. staff member, lay leader, etc.) who moderates and manages the email alias. Email options for each group can be one of the following:

- \* Announce Only only moderators and users affiliated with this ministry is allowed to send messages to this list
- \* Private List only members of the group can send messages to the list
- \* Public List anyone can send messages to the

These are the following "Types" of groups: \* Ad Hoc - these are self-service groups that need

- to be further-defined. \* Category – see below for more information
- \* Growth these are Growth Groups, which has a host, a facilitator, and a structure type (e.g. Young Adult, Regular, Spanish Speaking, etc.)
- \* Regular these groups are for everything else \* Smart - these groups cannot have individuals manually added or removed to it, but instead its membership is defined by rules (e.g. "any individual who is listed as a facilitator of a Growth Group")

To help with the organization of groups, groups can have a category, and categories can be nested. Note that categories, in and of themselves, cannot have individual members assigned to it. However, categories can also have email aliases (e.g. safarikids@groups.alcf.net) where the message would be sent out to the distinct set of individuals who are part of any group that belongs to the "Safari Kids" category.

Normally, any groups that an individual is part of will be listed in the individual's profile page on Screen 2.4.1. However, if a specific group is marked as "Confidential", the individual's membership will NOT be made known to any user not affiliated with the ministry that the group is part of.

Any logged-in user can view the membership of any non-confidential group. For confidential groups, only users affiliated with the ministry of that group can view the membership.

Only users affiliated with the ministry of a group can edit the membership, name, categorization and other properties of a given group. They are also the only ones who can create new groups and view/edit roles for the ministry.

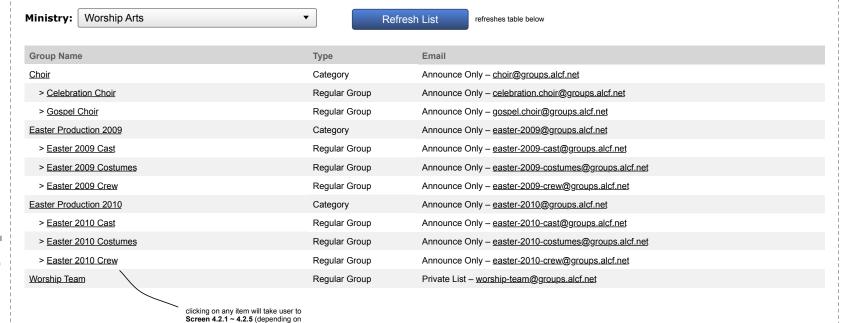
Thu Feb 04 2010 Page 46 of 55

# **ALCF** Church Management System

**PEOPLE HOUSEHOLDS GROUPS** ADMINISTRATION LOG OUT COMMUNICATIONS

### **View Groups in "Worship Arts"**

the Group type)



This will take the user to a "blank" version of Screen 4.2.1 ~ 4.2.5 (depending on the Group type)

**Create a New Group for Type:** 

Regular Group

Create

View Roles in Worship Arts

to Screen 4.5

ALCF Church Management System IA Membership Subsystem 4.1.2 View Groups (GG)

View Groups - Example for Growth Groups

See Screen 4.1.1 for notes

# **ALCF** Church Management System

Welcome, Joe User

**PEOPLE** HOUSEHOLDS **GROUPS** COMMUNICATIONS ADMINISTRATION LOG OUT

# View Groups in "Growth Groups"

Ministry: Growth Groups	▼ Refres	h List refreshes table below
Group Name	Туре	Email
Growth Groups	Category	Announce Only – gg@groups.alcf.net
> Peninsula	Category	
> San Francisco 01	Regular Group	Private List – gg.sf01@groups.alcf.net
> San Francisco 02	Regular Group	Private List – gg_sf02@groups.alcf.net
> <u>South Bay</u>	Category	
> Mountain View 01	Regular Group	Private List – gg_mv01@groups.alcf.net
> Palo Alto 01	Regular Group	Private List – gg_pa01@groups.alcf.net
Growth Group Facilitators	Category	Announce Only – gg.fac@groups.alcf.net
> <u>Living Lessons Facilitators</u>	Smart Group	Announce Only – gg.fac.ll@groups.alcf.net
> Regular Facilitators	Smart Group	Announce Only – gg.fac.regular@groups.alcf.net
> Young Adults Facilitators	Smart Group	Private List – gg_fac_ya@groups.alcf.net
Growth Group Hosts	Smart Group	Private List – worship-team@groups.alcf.net

This will take the user to a "blank" version of Screen 4.2.1 ~ 4.2.5 (depending on the Group type)

Create

Create a New Group for Type: Regular Group

View Roles in Worship Arts

to Screen 4.5

ALCF Church Management System IA Membership Subsystem 4.2.1 View Group, Category

View Group - type "Category"

Groups must be affiliated with at least one ministry.

If a group is affiliated with more than one ministry, it must be at the top-level (e.g. it must have a category of "none").

If the group is considered "Confidential", only users in affiliated ministries have access to this page for the confidential group. Moreover, the group will be marked as Confidential.

Clicking on any group will take the user to Screen 4.2.x for that group.

Clicking on any individual will take the user to Screen 2.2 for that individual.

# **ALCF** Church Management System

PEOPLE **HOUSEHOLDS GROUPS** 

COMMUNICATIONS

ADMINISTRATION

LOG OUT

### **Group Category "Growth Groups"**

Ministry: Growth Groups

Parent Category: none

Email List Preferences: Announce Only – gg@groups.alcf.net

### **CONFIDENTIAL**

only displayed if group is "Confidential"

to Screen 4.3.1

Welcome, Joe User

Edit

### **Groups in this Category**

Group Name	Туре	Email
Peninsula	Category	none
> San Francisco 01	Regular Group	Private List – gg <u>.sf01@groups.alcf.net</u>
> San Francisco 02	Regular Group	Private List – gg <u>.sf02@groups.alcf.net</u>
South Bay	Category	none
> Mountain View 01	Regular Group	Private List – gg.mv01@groups.alcf.net
> Palo Alto 01	Regular Group	Private List – gg_pa01@groups.alcf.net

### Individuals in the Groups in this Category

First Name	Last Name	Email	Member	Group(s)	Role(s)
Addis	Alexander	addis.alexander5115@aol.com	N	San Francisco 02 and Mountain View 01	Member
Marshal	Allen	marshala4963@aol.com	Υ	San Francisco 02	Faciliator and Member
Clem	<u>Bailey</u>	clem.bailey1017@mail.nasa.gov	Υ	Palo Alto 01	Host and Member
Cleo	Barnes	cleo.barnes8686@aol.com	Υ	San Francisco 02	Faciliator and Member
<u>Pansy</u>	<u>Barry</u>	pansy.barry7645@hotmail.com	N	San Francisco 01	Member
Robbie	<u>Bennett</u>	robbie.bennett736@sbcglobal.net	Υ	Mountain View 01	Member
Rona	Bennett	ronab1488@excite.com	Υ	San Francisco 02 and Mountain View 01	Member
Mildred	Brennan	mildred.brennan5219@northwestern.edu	Υ	San Francisco 01	Member
<u>Etheldreda</u>	Brooks	ebrooks2987@excite.com	N	San Francisco 02	Member
<u>Benjamin</u>	<u>Browne</u>	benjamin.browne6107@hotmail.com	Υ	San Francisco 01	Faciliator
<u>Jared</u>	Bryant	jbryant2426@gmail.com	N	Palo Alto 01	Faciliator
Travers	Burke	tburke2474@gmail.com	N	San Francisco 02	Member
Connie	Burns	cburns8486@rice.edu	Y	Palo Alto 01	Faciliator
<u>Bobby</u>	Carter	bobbyc1537@rice.edu	N	Mountain View 01	Faciliator
Ginnie	Carter	gcarter6314@earthlink.net	N	San Francisco 02 and Mountain View 01	Member
Nessia	Clarke	nessiac5553@rice.edu	N	Mountain View 01	Member
Rowena	<u>Coleman</u>	rcoleman8763@rice.edu	N	Mountain View 01	Host
Juliet	Cox	juliet.cox3115@gmail.com	Υ	San Francisco 02 and Mountain View 01	Faciliator
Stanford	Cox	stanford.cox7017@aol.com	N	Mountain View 01	Member 9
7 Ωουα	<u>Daly</u>	dougd7928@rocketmail.com	N	Palo Alto 01	Member

ChMS Main IA.graffle Thu Feb 04 2010 Page 48 of 55



### ALCF Church Management System IA Membership Subsystem 4.2.2 View Group, Growth

View Group - type "Growth"

This screen is more or less the same for Regular groups as well.

See Screen 4.2.1 for any additional notes.

Edit buttons will take user to Screen 4.4.1.

**ALCF** Church Management System

**PEOPLE** HOUSEHOLDS **GROUPS** COMMUNICATIONS

ADMINISTRATION

LOG OUT

to Screen 4.3.1 Edit

Welcome, Joe User

## **Growth Group "San Francisco 02"**

Ministry: Growth Groups

Parent Category: Growth Groups > Peninsula

**Email List Preferences:** Private List – <u>gg.sf02@groups.alcf.net</u>

### Individuals in this Group

to Screen 4.4.2 Add a Member

Edit	First Name	Last Name	Email	Member	Current Role(s)
<u>Edit</u>	<u>Abie</u>	Allen	abie.allen3450@yahoo.com	N	Member and Faciliator
<u>Edit</u>	Alastair	McLaughlin	amclaughlin5970@sbcyahoo.com	N	Member
— <u>Edit</u>	Alfred	<u>Dwyer</u>	alfred.dwyer3352@sbcyahoo.com	N	Member and Host
<u>Edit</u>	<u>Alida</u>	Cooper	acooper4275@mail.nasa.gov	N	Member
<u>Edit</u>	Alva	Wright	alvaw1204@rocketmail.com	Υ	Member
Edit	Alvina	Peterson	alvina.peterson3107@gmail.com	Υ	Member
<u>Edit</u>	<u>Amery</u>	Cullen	amery.cullen9880@mail.nasa.gov	Υ	Member
Edit	Andrew	Burke	andrew.burke9075@sbcyahoo.com	Υ	Member and Faciliator
<u>Edit</u>	<u>Andy</u>	<u>O'Leary</u>	aoleary9121@sbcyahoo.com	Υ	Member and Faciliator
Edit	<u>Anita</u>	Scott	anitas6858@rocketmail.com	Υ	Member and Faciliator
<u>Edit</u>	Ardelle	McMahon	ardelle.mcmahon3962@lycos.com	N	Member
<u>Edit</u>	Arrian	White	awhite7173@aol.com	Υ	Member
Edit	Artie	White	awhite87@hotmail.com	N	Member
Edit	Babs	Johnson	bjohnson989@earthlink.net	N	Member
Edit	Baldwin	Flores	bflores2329@earthlink.net	Υ	Member
Edit	Bass	<u>Doyle</u>	bass.doyle7418@sbcglobal.net	N	Member and Host
<u>Edit</u>	<u>Baxter</u>	Hwang	baxterh1607@aol.com	N	Member
<u>Edit</u>	<u>Betsy</u>	Ross	betsyr1042@excite.com	Υ	Member
<u>Edit</u>	<u>Beverley</u>	<u>Evans</u>	beverley.evans2383@attmail.com	Υ	Member
Edit	<u>Birdie</u>	Graham	birdieg134@excite.com	Υ	Member
<u>Edit</u>	<u>Boby</u>	Kane	bobyk4623@hotmail.com	N	Member

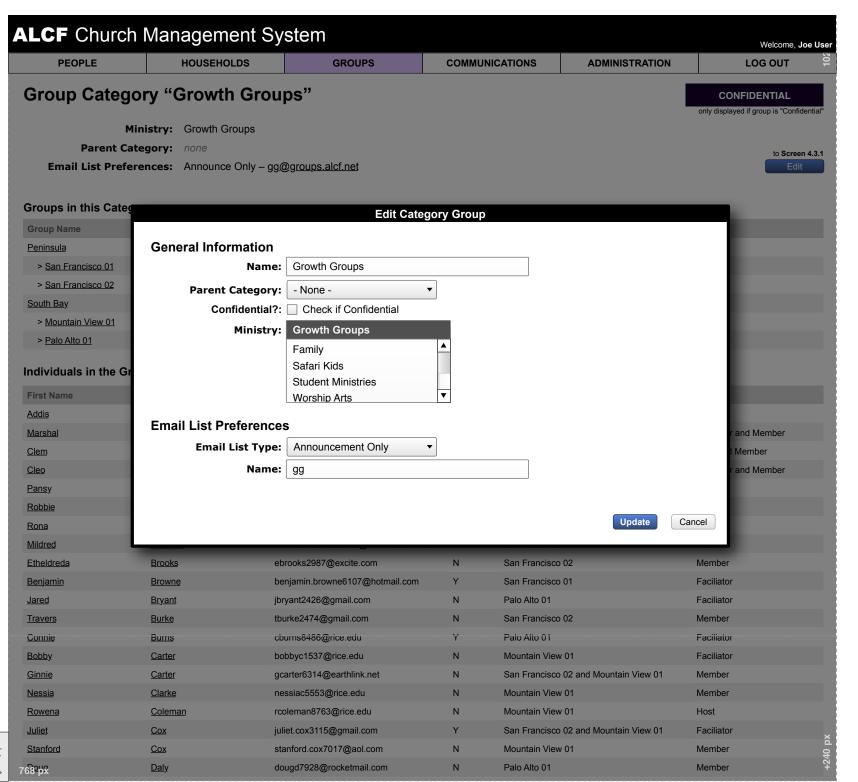
ChMS Main IA.graffle Thu Feb 04 2010 Page 49 of 55

#### ALCF Church Management System IA Membership Subsystem 4.3.1 Edit Group

#### **Edit Group**

Because a multiple-ministry group needs to be at the top level, Parent Category will gray out if multiple ministries are selected.

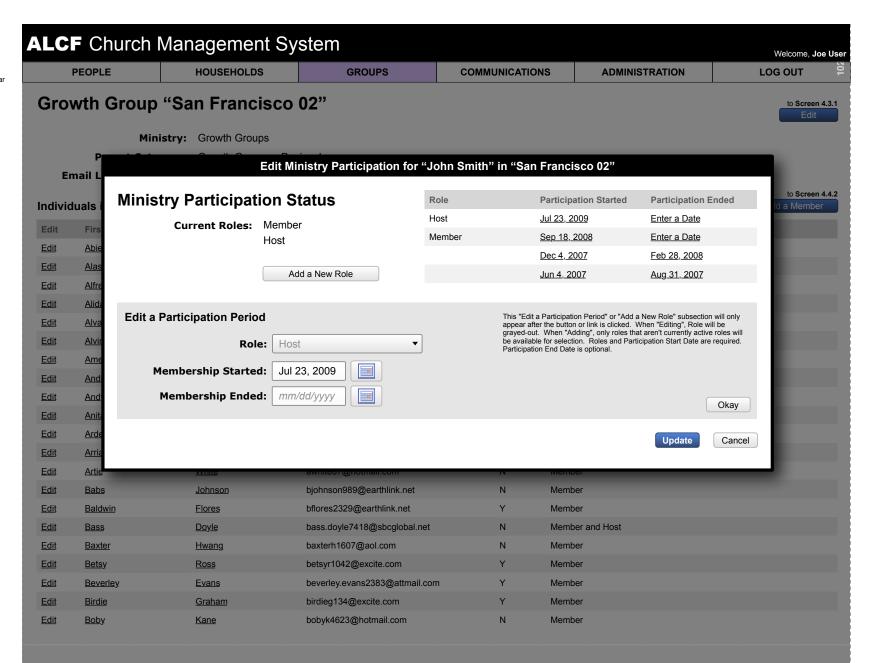
Also, because a group is automatically part of a ministry if it has a parent category, ministries will be grayed out if Parent Category is *not* "None".



#### ALCF Church Management System IA Membership Subsystem 4.4.1 Edit Group Participation

#### **Edit Group Membership**

This screen is more or less the same for Regular groups as well.



ALCF Church Management System IA Membership Subsystem 4.4.2 Add Group Participation

#### Add Group Membership

This screen is more or less the same for Regular groups as well.

List of Roles is defined at the Ministry level.

# **ALCF** Church Management System

COMMUNICATIONS

Add a Ministry Participant to "San Francisco 02"

**ADMINISTRATION** 

LOG OUT

**Growth Group "San Francisco 02"** 

to Screen 4.3.1

to Screen 4.4.2

Welcome, Joe User

Ministry: **Parent Category Email List Preferences:** 

**PEOPLE** 

Individuals in this Group

**First Name** 

<u>Abie</u>

Alastair

Alfred

Alida

<u>Alva</u>

<u>Alvina</u>

<u>Amery</u>

**Andrew** 

**Andy** 

<u>Anita</u>

<u>Ardelle</u>

<u>Arrian</u>

<u>Artie</u>

<u>Babs</u>

**Bass** 

**Baxter** 

<u>Betsy</u>

**Birdie** 

**Boby** 

**Beverley** 

Baldwin

Edit Edit

<u>Edit</u>

Edit

Edit

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

Edit

**Edit** 

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

Edit

Edit

Edit

Edit

**Edit** 

**Edit** 

Edit

**Edit** 

**Role in Group** 

**HOUSEHOLDS** 

Participation Started:

Participation Ended: mm/dd/yyyy

Title:

Suffix:

Phone:

Role:

**GROUPS** 

Faciliator

- None -

- None -

Jul 23, 2009

**Name Information** 

Jennifer **First Name:** 

Middle Name or Initial:

**Last Name:** Peterson

> Jenny Peterson Goes By:

> > To be used for emails, mailings, etc. If left blank, "Patrick Smith" will be used.

**Contact Information** 

Kane

jpeterson@gmail.com Email:

408-555-1212

Cell Phone

bobyk4623@hotmail.com

Member

Cancel

Next

Upon hitting Next, the system will try and determine if there are any matches. If none exists, the system will popup a "Individual Does Not Exist - Create a New Individual record?" confirmation dialog box. If at least one exists, the user will be redirected to Screen 4.4.3.

ChMS Main IA.graffle Thu Feb 04 2010 Page 52 of 55

An Exciting Fellowship of Growing Believers

#### ALCF Church Management System IA Membership Subsystem 4.4.3 Add Group Participation, Reconcile Individual

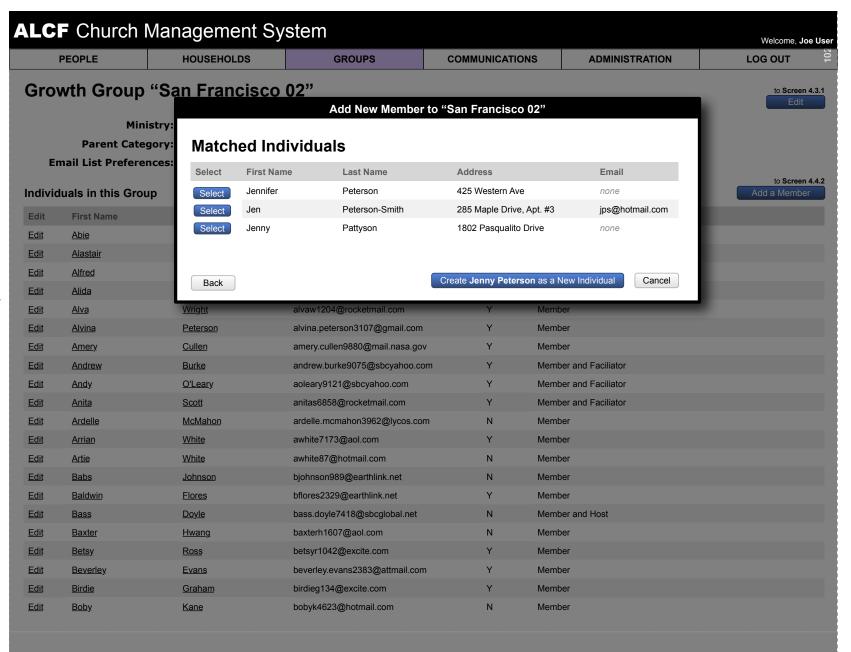
This screen is more or less the same for Regular groups as well.

Hitting Select will add the selected individual as a new member to the group. The window will then close, essentially redirecting the user to Screen

Hitting Create will first create the new individual without a household record and then associate the individual as a new member to the group. The user will then be prompted "View/Edit Preferences for the New Individual?" If ves, the user will be redirected to Screen 2.2 for the new individual Otherwise, the dialog box will close, essentially redirecting the user to Screen 4.2.2.

Hitting Back will take the user back to Screen

Hitting Close will close the dialog box, essentially redirecting the user to Screen 4.2.2.



Thu Feb 04 2010 Page 53 of 55

### ALCF Church Management System IA Membership Subsystem 4.5 View Ministry Roles

### View Group Roles for Ministry

Allows the user to view and edit assignable group roles for the ministry.

Only users affiliated with a given ministry can view or edit the roles for that ministry.

Each defined role must have a role type:

- Volunteer
- Participant

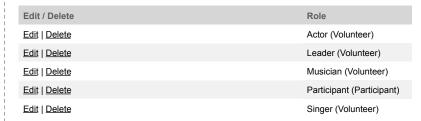
Only roles that are not currently being used are able to be Deleted.

Clicking on "Edit" allows the user to use the textbox to edit a particular role name. "Add Role" disappears and "Update" and "Cancel" appear instead.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

### View Roles in "Worship Arts"



Add Role

updates the above list and saves changes

Back to View Groups

to Screen 4.1.1

### ALCF Church Management System IA Membership Subsystem 6.1 Administration Menu

### Main Administration Menu

Only ChMS Administrators have access to this page and anything else under "Administration".

# **ALCF** Church Management System

**PEOPLE** HOUSEHOLDS **GROUPS** COMMUNICATIONS ADMINISTRATION LOG OUT

## **Administration Menu**

Vew Users

View and Manage Users of the ChMS System

goes to Screen 6.2