ALCF Church Management System IA Membership Subsystem

Login Page

0.1 Login

This page allows any staff member with the appropriate privileges to log in to the ChMS.

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

Passwords are their Windows Domain network

Note that 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.

| Username or Email: | | |
|--------------------|--------|---------------------------|
| | | |
| Password: | | |
| | | |
| | Log In | |
| | | |
| | | goes to Screen 1.1 |



This acts as the "Main Menu" for the entire admin-

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:
• 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

| The Administration button and tab (in the navbar) |
|--|
| s only accessible to those ChMS Users that have |
| this permission. |

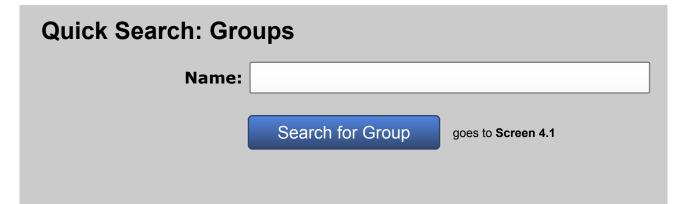
ALCF Church Management System

PEOPLE

HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION

Main Menu

| Quick Search: People | | |
|----------------------|--------------------------------------|--|
| First Name: | | |
| Last Name: | | |
| | Search for Person goes to Screen 2.1 | |



People Manage individual membership records goes to Screen 2.1 Households Manage household records goes to Screen 3.1 Manage group records Groups goes to Screen 4.1.1 Communications Manage communication lists

Administration goes to Screen 6.1

goes to Screen 5.1

Manage administration tasks for the ALCF ChMS



Welcome, Joe User

Search for an Individual

This allows the user to search for an any individual

Each individual can be a membership status of

Member

Non-Member/Tithe

None

To Confirm: 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 will take the user to Screen 2.2 for that individual.

ALCF Church Management System

<u>Doyle</u>

<u>Duffy</u>

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Search for an Individual

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

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

77280 Redwood City Way

12497 La Habra Road

Member

Non-Member/Tithe

Indian Wells

Fort Bragg

<u>Tina</u>

<u>Beverly</u>

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 single household would be displayed on Screen 2.2

- Individual that is not part of any households (e.g. single person) would be displayed on Screen 2.2.1 · 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

Position in household can be one of the following:

- Spouse
- Child
- Parent (e.g. for a household with an adult Head of Household, "Parent" would be the grandparent in that household)

There can only be one Head of Household.

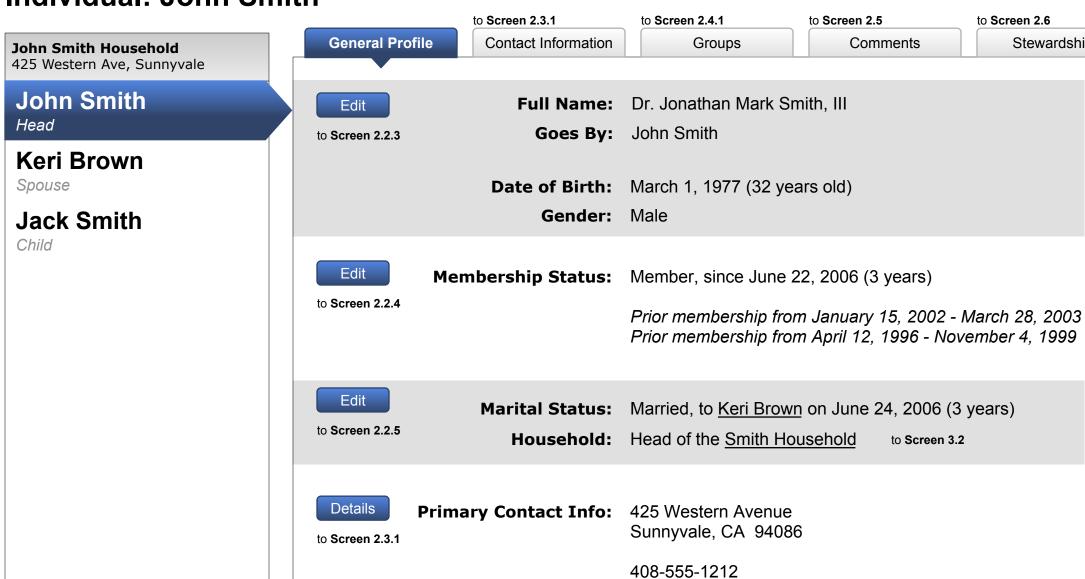
Clicking on any of the names will take the user to the Screen 2.2, Screen 2.2.1 or Screen 2.2.2 for that individual, depending on the individual him/ herself according to the rules detailed above.

Only users with the CanMergeIndividuals permission can view or click on the Merge Records button. Button will take the user to Screen 2.7.

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS LOG OUT ADMINISTRATION

Individual: John Smith



jsmith@gmail.com

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

Edit

to Screen 2.2.5

to Screen 2.9

Attributes

to Screen 2.6

Stewardship

Merge Records

to Screen 2.7

View an Individual - General Profile Tab

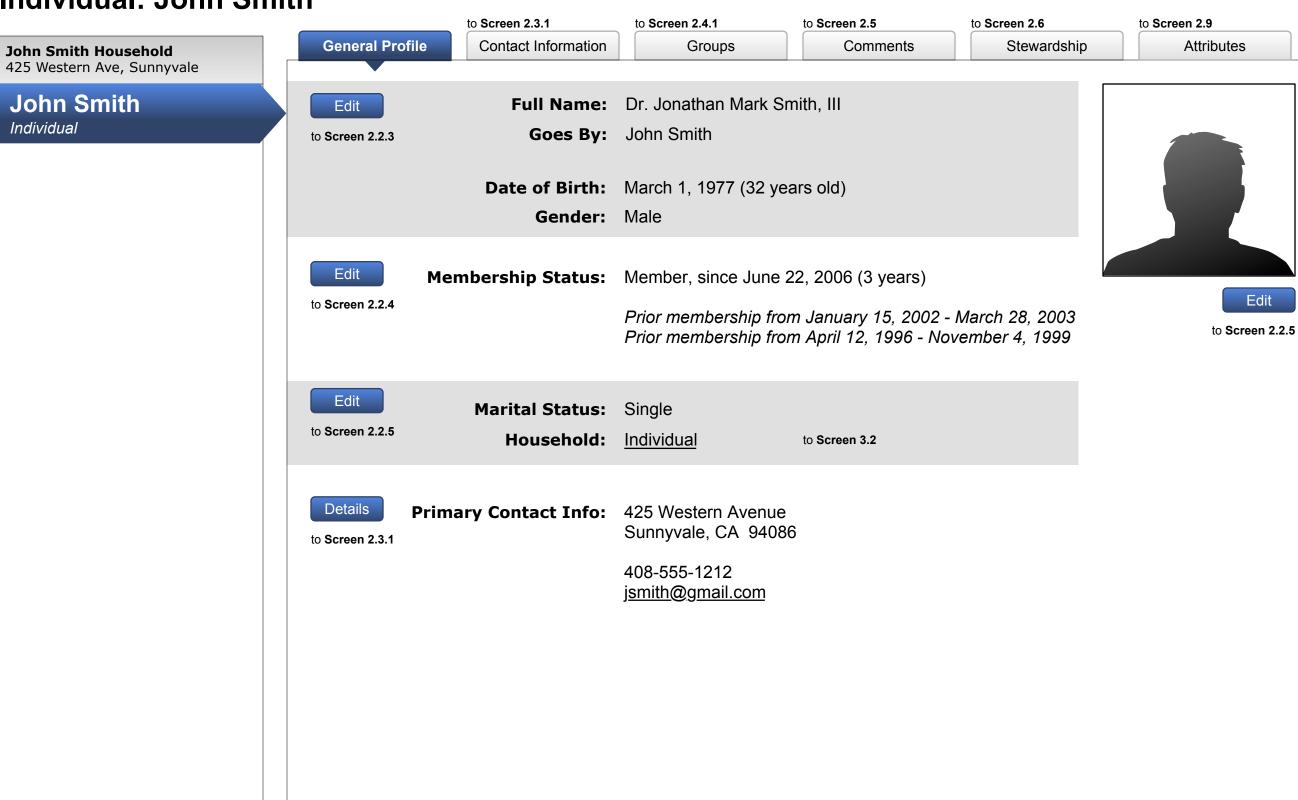
ALCF Church Management System

PEOPLE HOUSEHOLDS

GROUPS COMMUNICATIONS ADMINISTRATION **LOG OUT**

Single-Person Household See Screen 2.2 for notes.

Individual: John Smith



Merge Records

to Screen 2.7

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

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See Screen 2.2 for notes.

Note that because this individual's data is incomplete, users have limited access for this individual.

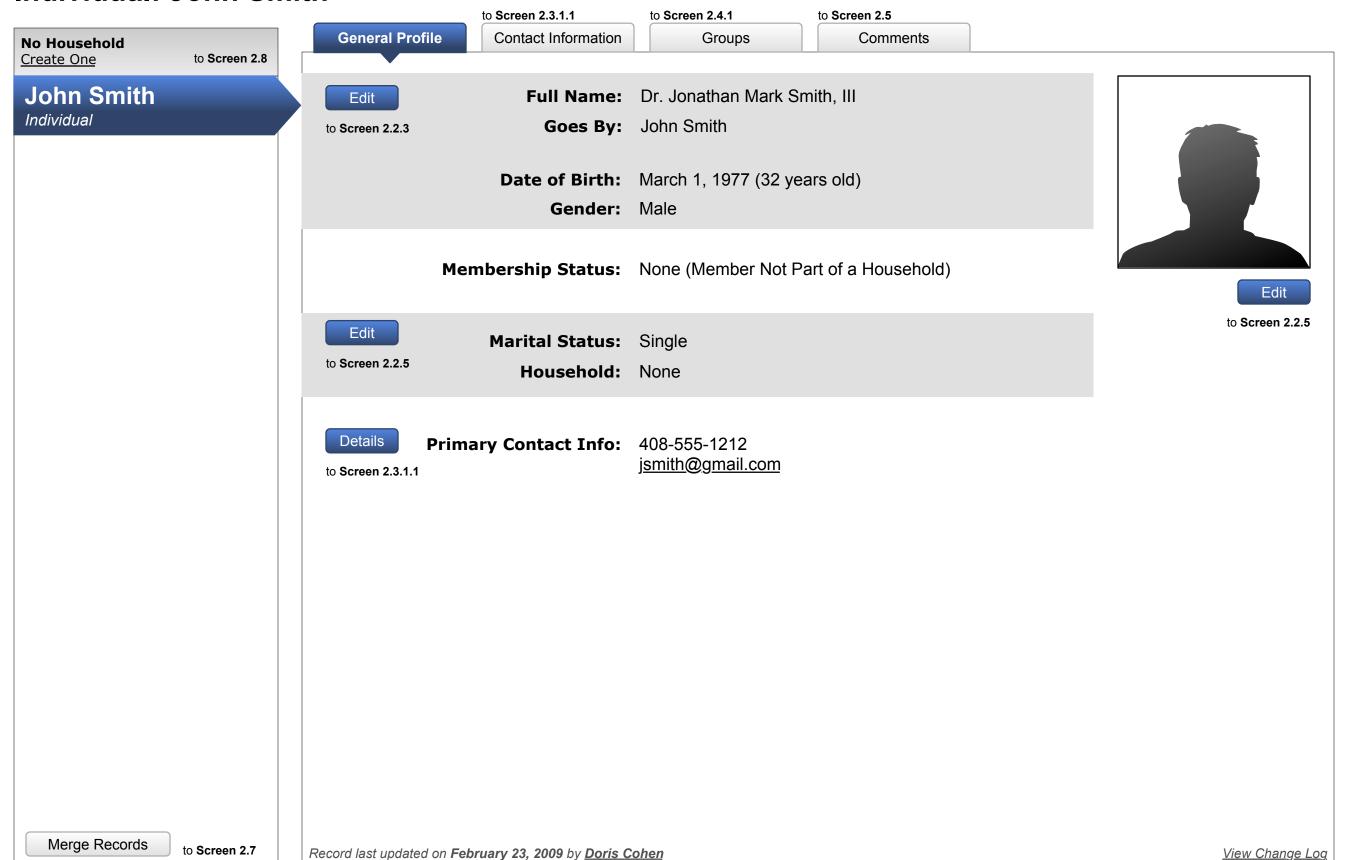
Individual's without any households:

- * cannot have any membership status (it is "None" by default)
- * cannot have any physical addresses assigned to
- * cannot track stewardship

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS 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

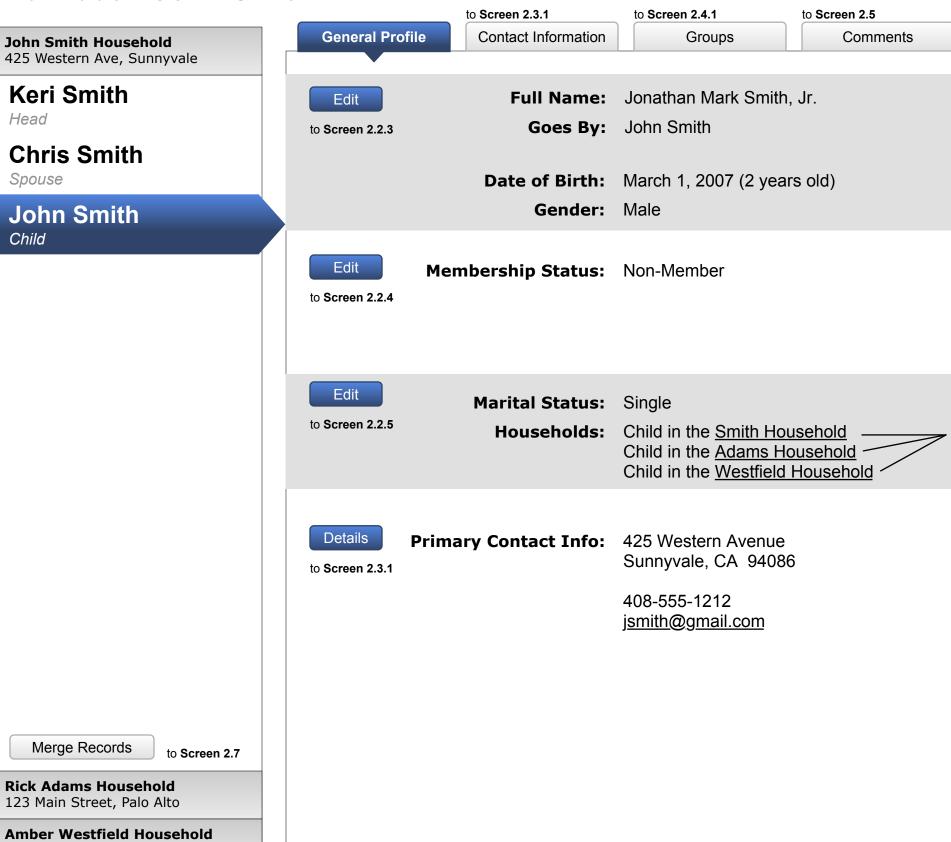
View an Individual - General Profile Tab Multiple Households

See Screen 2.2 for notes.

ALCF Church Management System

GROUPS PEOPLE HOUSEHOLDS COMMUNICATIONS ADMINISTRATION LOG OUT

Individual: John Smith



Record last updated on February 23, 2009 by Doris Cohen

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.

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View Change Log

Welcome, Joe User

Edit

to Screen 2.2.6

to Screen 2.9

Attributes

to Screen 2.6

to Screen 3.2

Stewardship

1852 Mary Ave, Sunnyvale

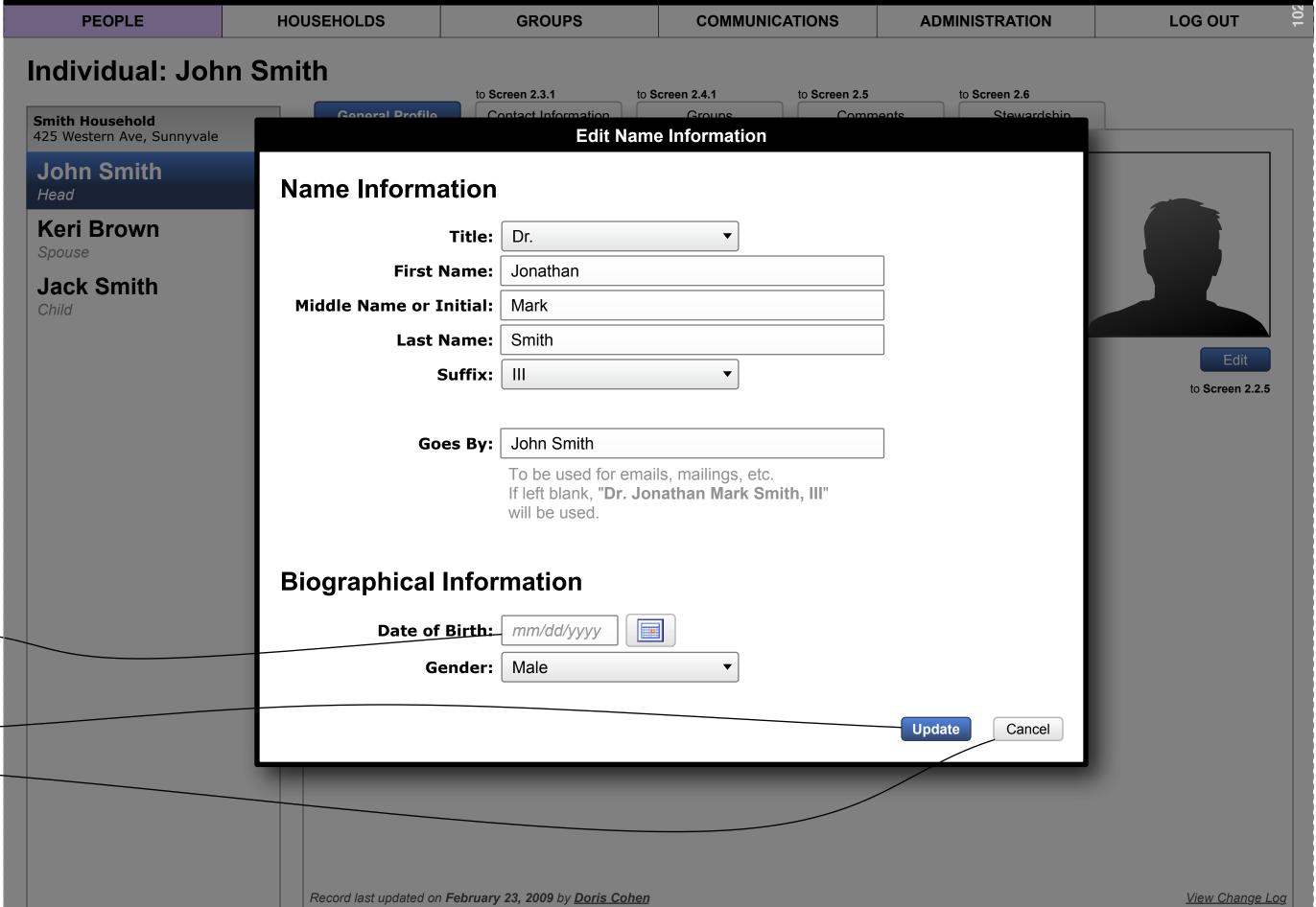
Edit an Individual – General Information

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 either just a Month/Day combination OR a full Month/Day/Year 🗻 combination.

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.



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

Edit an Individual – Membership Information

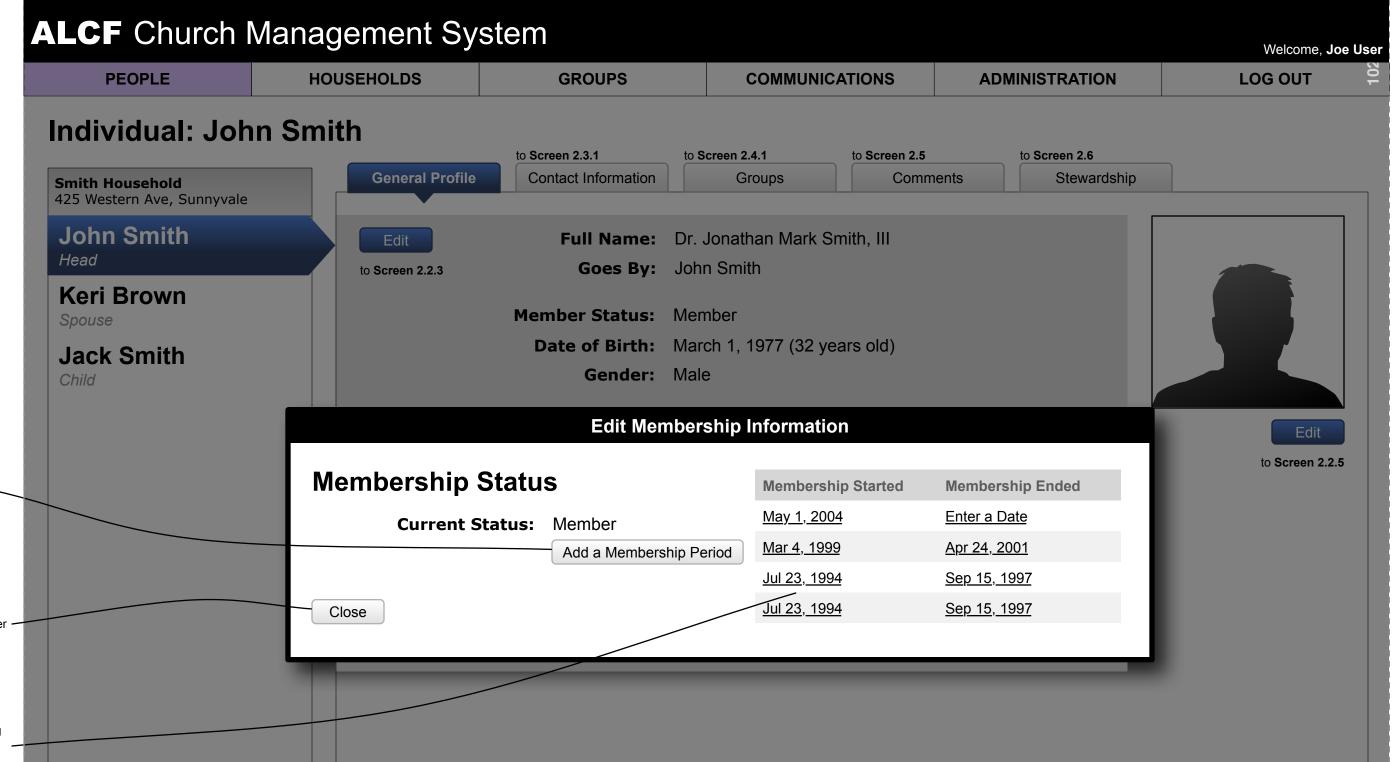
This screen allows a user to edit an individual's Membership Information.

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 2.2.4.1**.

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**



Record last updated on February 23, 2009 by Doris Cohen

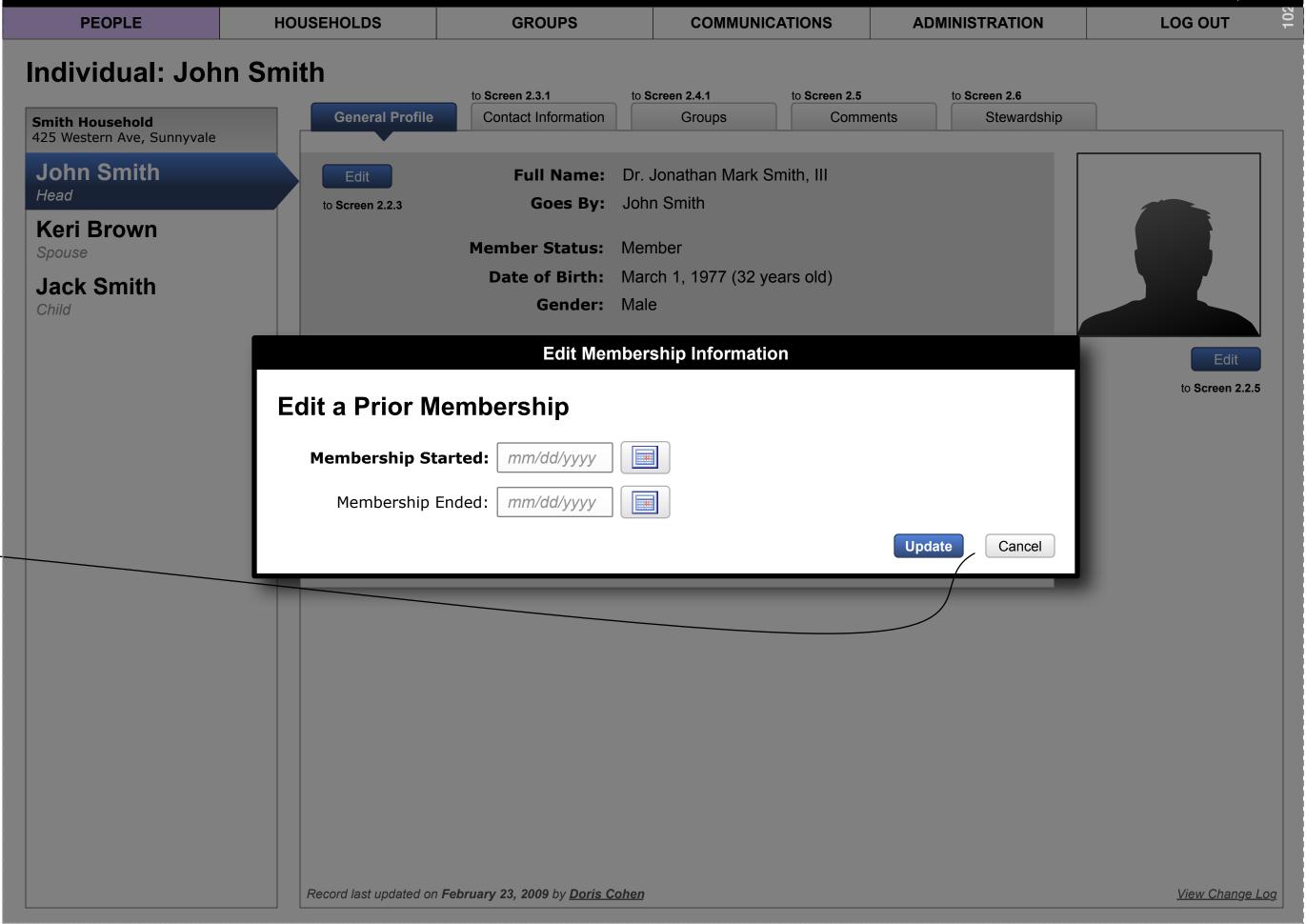
Edit an Individual – Membership Dates

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.

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



Edit an Individual – Family and Households

This screen allows a user to edit an individual's status in families and in households.

If a "Married To" name is entered, that name **must** be 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 "Merge into a single household?"

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

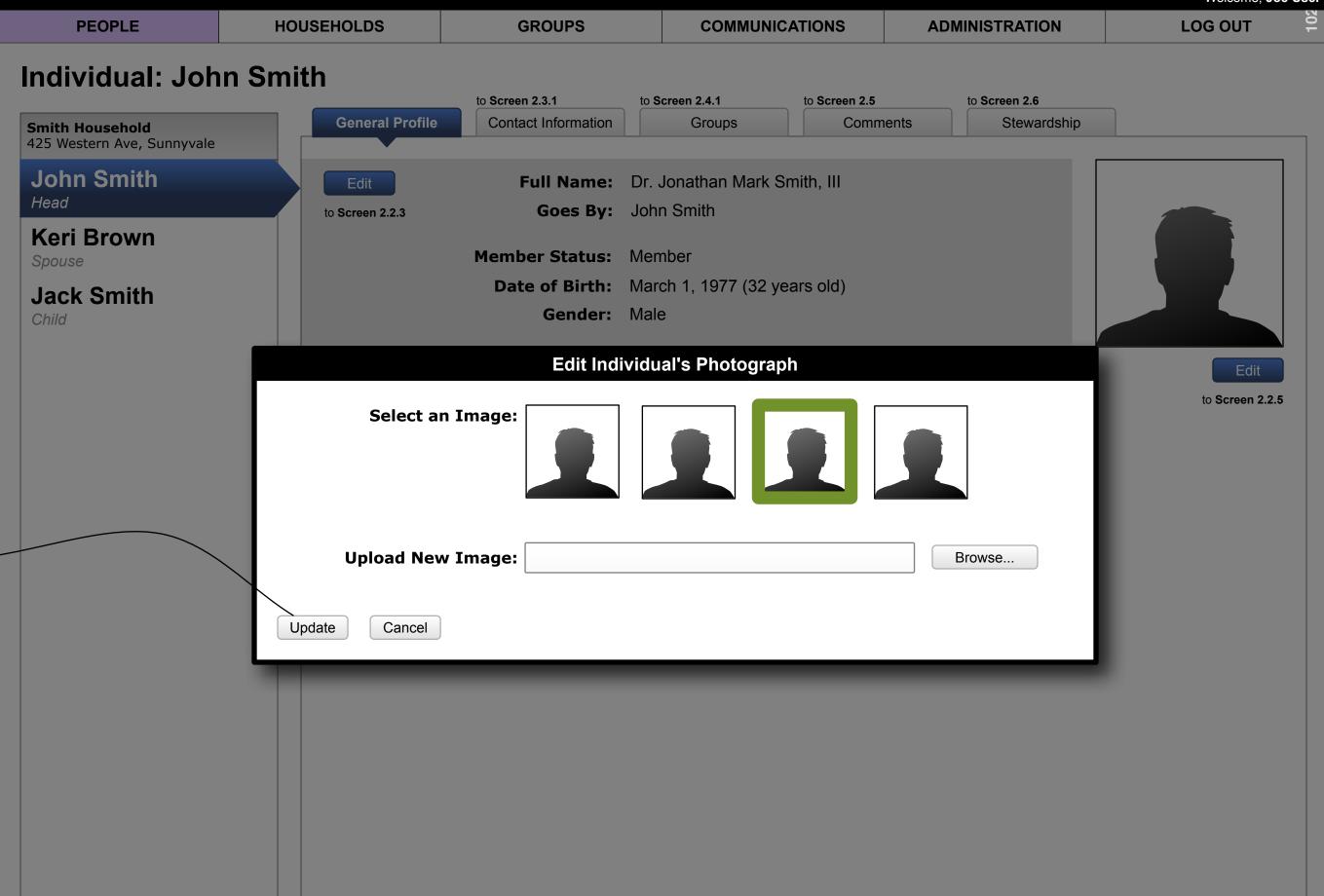
Close will simply close the window (taking the user back to where he or she came from) without saving anything to the database.



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

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

Update will set the new image will close the



Record last updated on February 23, 2009 by Doris Cohen

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)
- onther
- 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

Telephone Types for "Phone Information" can be:

Smith Household" at the top of the page (e.g.

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

through Screen 2.3.2)

Only one phone can be set as "Primary".

will redirect the user to Screen 2.3.5.

Clicking on email address or the Add New buttor

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

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ALCF Church Management System

to 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 | 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 | <u>650-555-1212</u> |
| [set as current] | 1852 Mary Ave | Sunnyvale, CA | 94087 | <u>408-421-1725</u> |

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 |
| Previous Home | 818 Third Street | San Francisco, CA | 94107 |
| Previous Home | 2811 Hillsdale Road, Apt. #412 | Hillsdale, CA | 94401 |
| Previous Work | 801 Canal Street, Suite #27A | Redwood City, CA | 94402 |

Phone Numbers for John Smith Add New

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

Email Addresses

to Screen 2.6

Stewardship

Primary? Email Address

Primary john_smith@gmail.com

[set as primary] jsmith1231@yahoo.com

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

Other Contact Information for John Smith

to Screen 2.3.6 Add New

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

| Contact Type | Value | _ |
|-----------------------|--------------------|---|
| 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 | |

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Record last updated on February 23, 2009 by Doris Cohen

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

View an Individual – Contact Information Tab No Household

See **Screen 2.3.1** for more information.

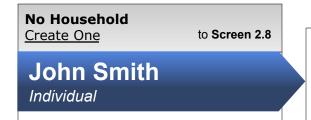
This screen is used for individuals who have NO household. They cannot have any addresses defined.

They CAN, however, have a Home phone defined.

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Individual: John Smith



| to Screen 2.2.1.1 | | to Screen 2.4.1 | to Screen 2.5 |
|--------------------------|--------------|-----------------|---------------|
| General Profile | Contact Info | Groups | Comments |
| | | | |

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



jsmith1231@yahoo.com

john.f.smith@company.org

to Screen 2.3.6

Add New

[set as primary]

[set as primary]

Welcome, Joe User

Other Contact Information for John Smith

| Contact Type | V alue |
|-----------------------|---------------------|
| AIM Screen Name | j <u>smith48421</u> |
| Facebook ID | <u>28410241</u> |
| Twitter Account Name | john smith 4 17 |
| Yahoo! Messenger Name | j <u>smith1231</u> |

to Screen 2.3.4

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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

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.

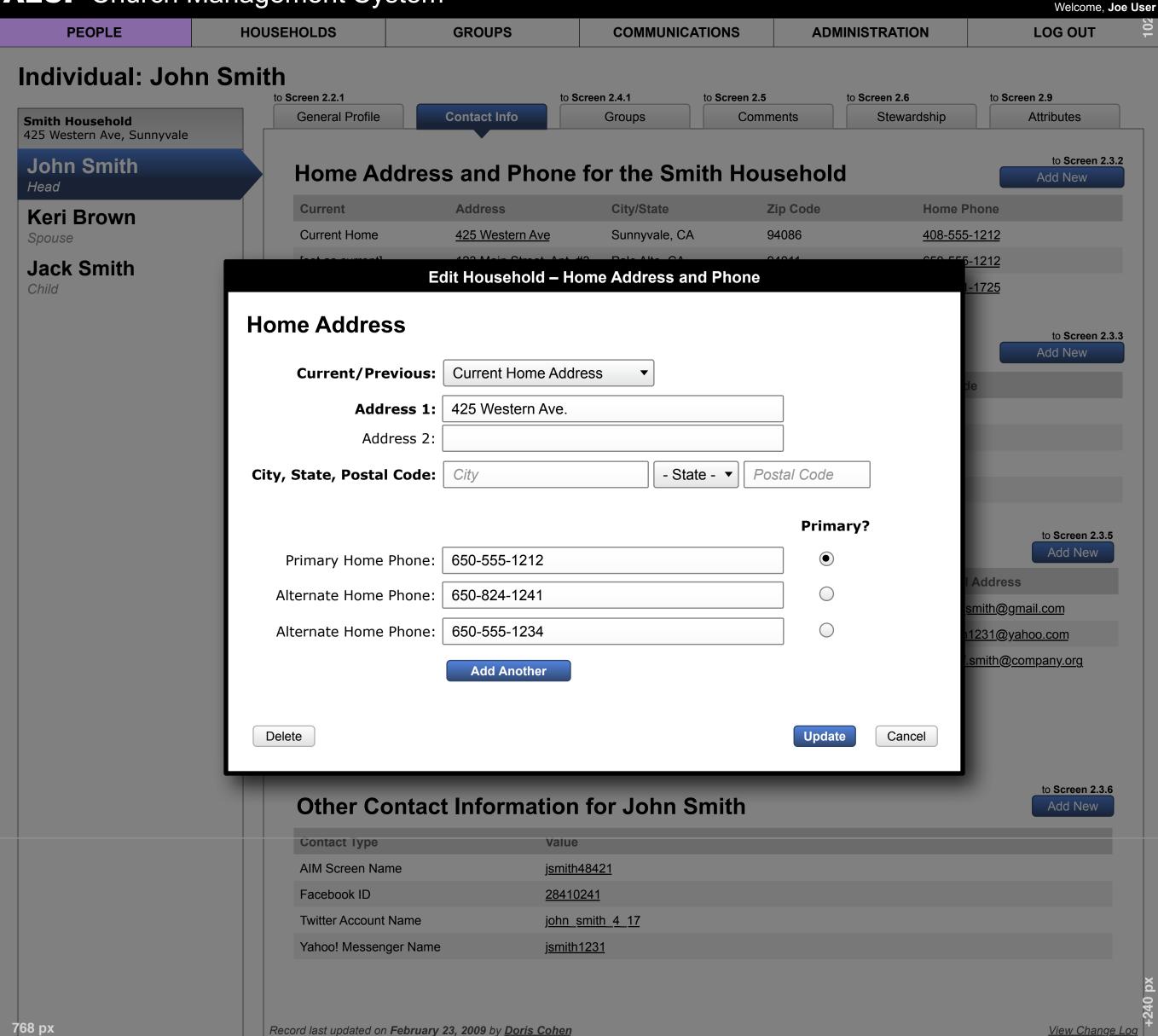
Clicking **Add Another** adds another blank "Alternate Home Phone" textbox to appear.

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 Tue Jan 19 2010 Page 15 of 53







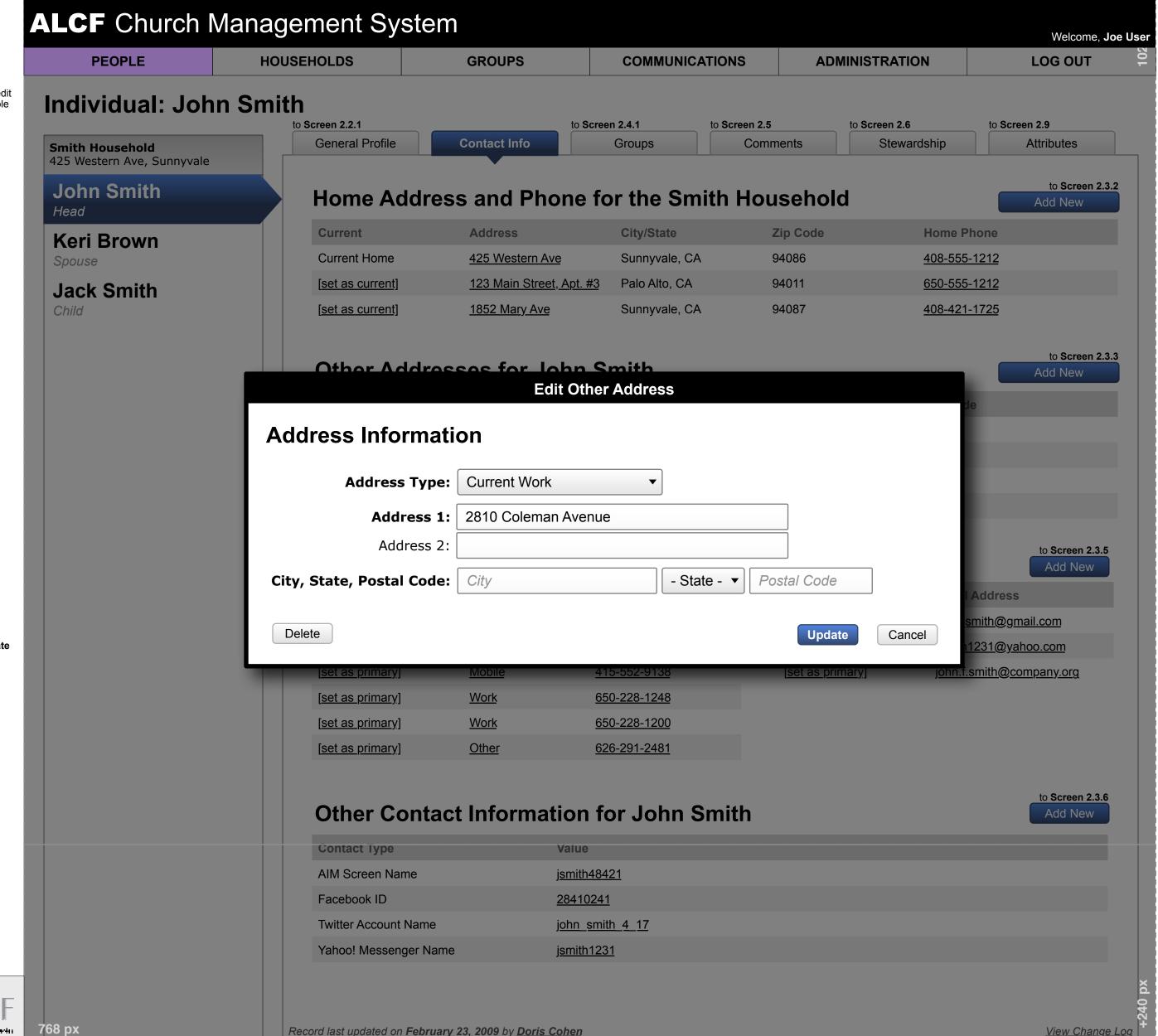
ALCF Church Management System IA Membership Subsystem 2.3.3 Edit Individual, Other Address

Edit an Individual – Other Address

This dialog box allows the user to add a new or edit an existing "other" address. This is only applicable for individuals that are part of at least one multiperson household.

See Screen 2.3.1 for address type information.

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



View Change Log

Record last updated on February 23, 2009 by Doris Cohen



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

Edit an Individual - Phone Number

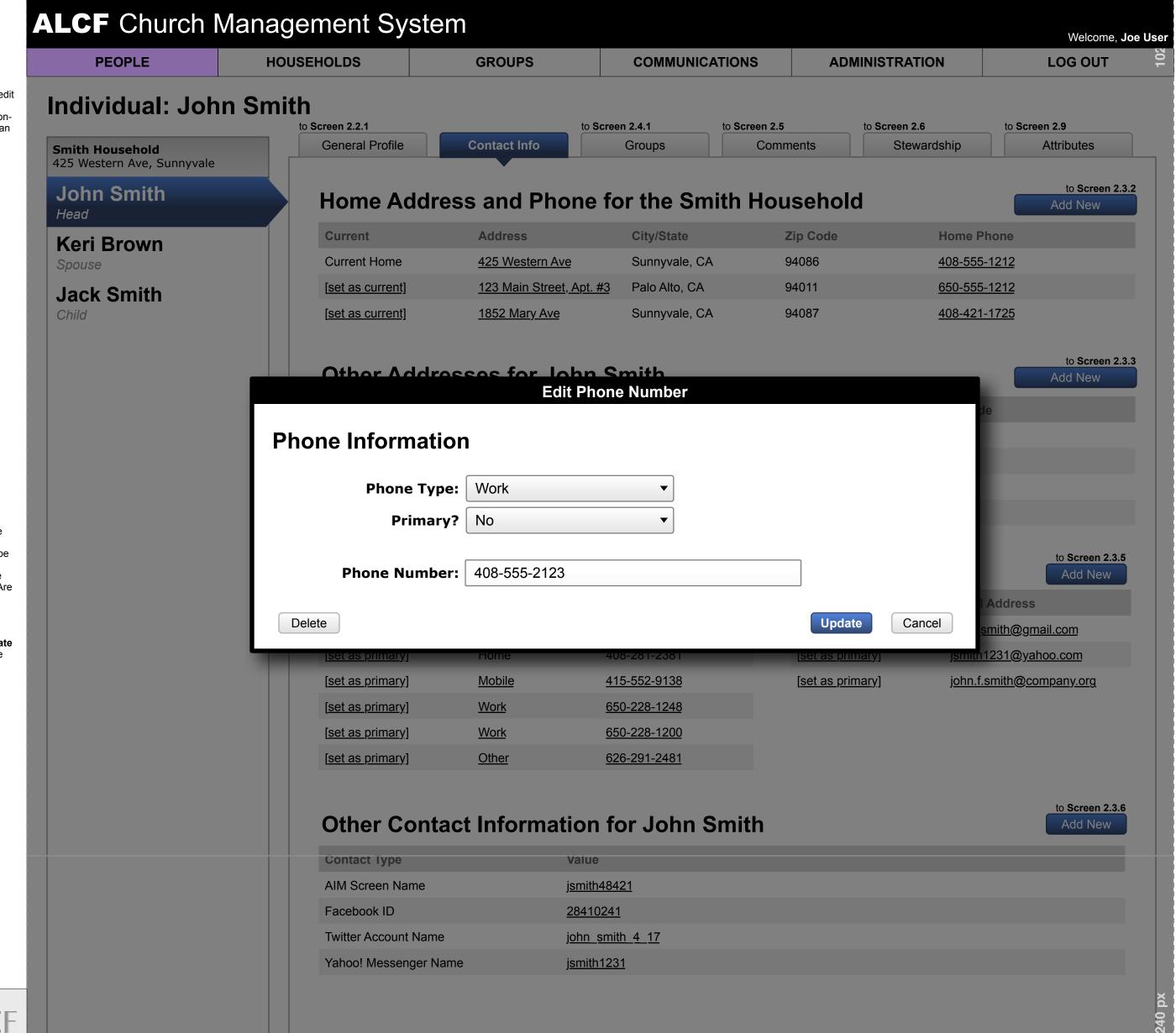
This dialog box allows the user to add a new or edit an existing phone number assigned to this individual. Note that this is only applicable for nonhome phone numbers. Home phone numbers can only be edited through **Screen 2.3.2**.

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**.



View Change Log

Record last updated on February 23, 2009 by Doris Cohen

ChMS Main IA.graffle Tue Jan 19 2010 Page 17 of 53



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

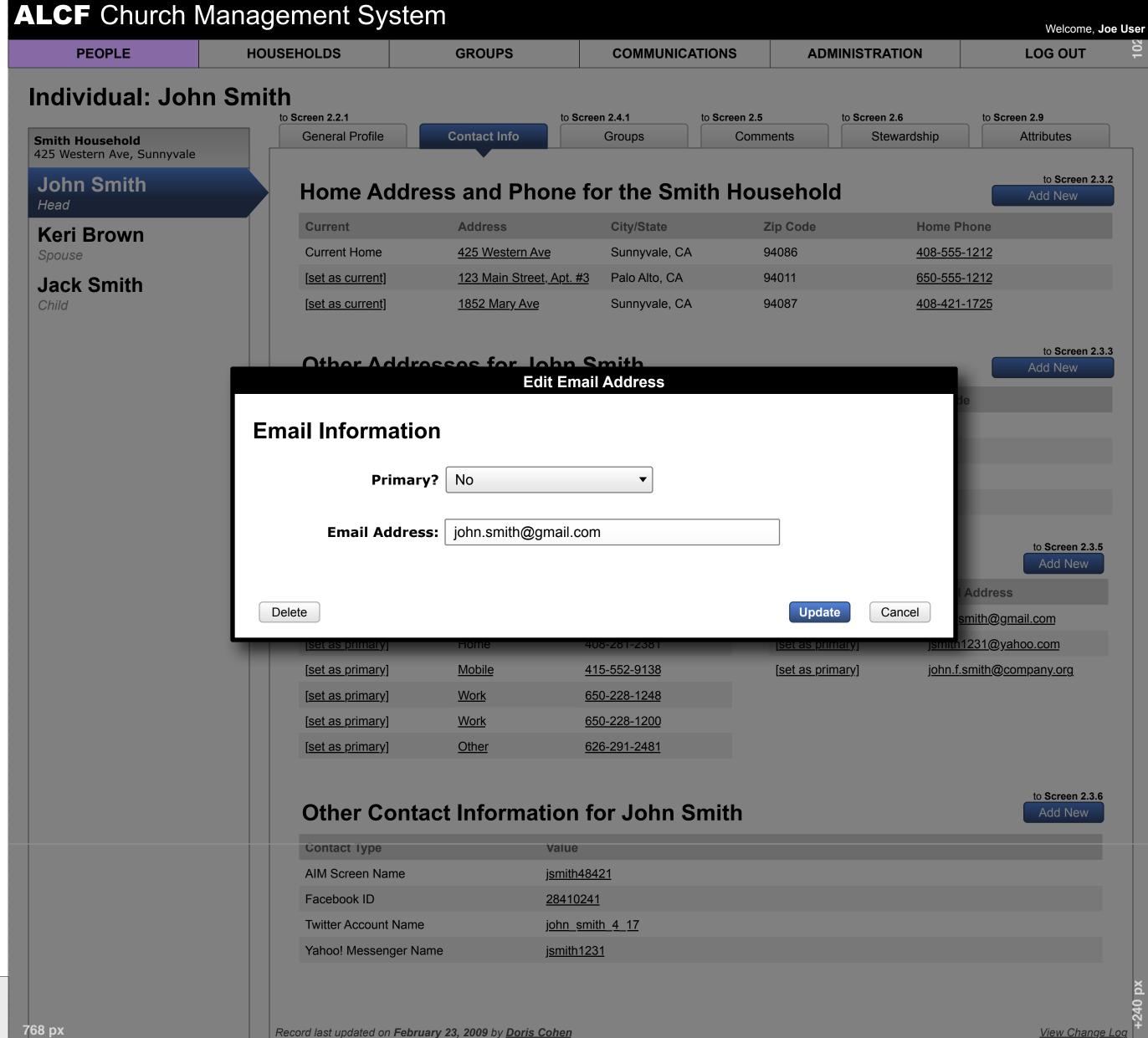
Edit an Individual - Email

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**.



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

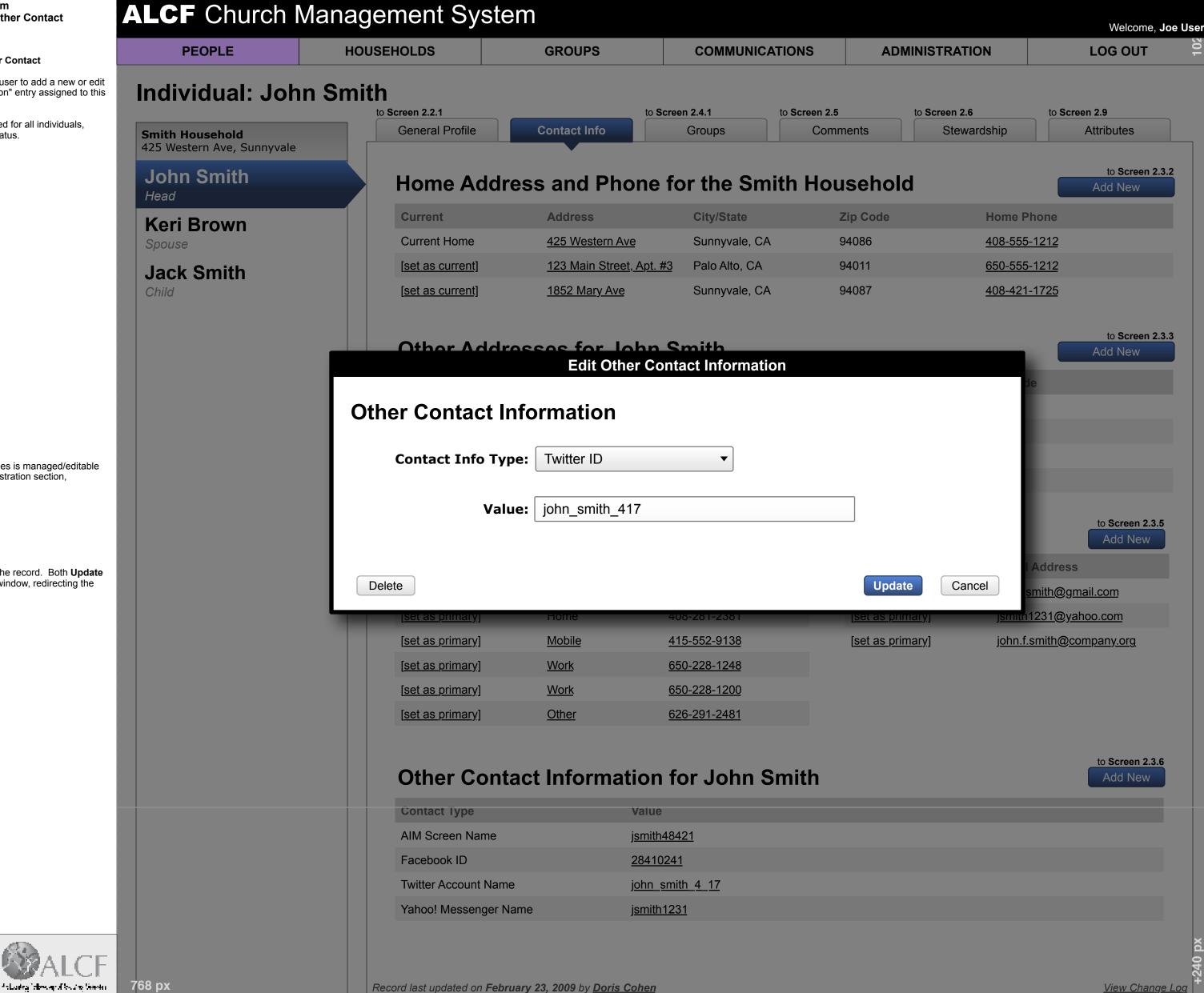
Edit an Individual - Other Contact

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

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.



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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

LOG OUT PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION

Groups

Individual: John Smith



Keri Brown

Spouse

Head

Jack Smith

Child

Ministry Participation

to Screen 2.3.1

Contact Info

to Screen 2.2.1

General Profile

Ministry Role **Dates of Involvement** April 2009 - Present Safari Kids Volunteer May 2007 - September 2008 Growth Groups > Mountain View 2 Participant January 4, 2004 - Present

Small Group Leader

to Screen 2.5

Comments

to Screen 2.6

Stewardship

September 24, 2007 - May 2008

Communication Lists

Real World Young Adults

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 |
| <u>Unsubscribe</u> | IT Team Developers | it_team_devs@groups.alcf.net |

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768 px

Record last updated on February 23, 2009 by Doris Cohen

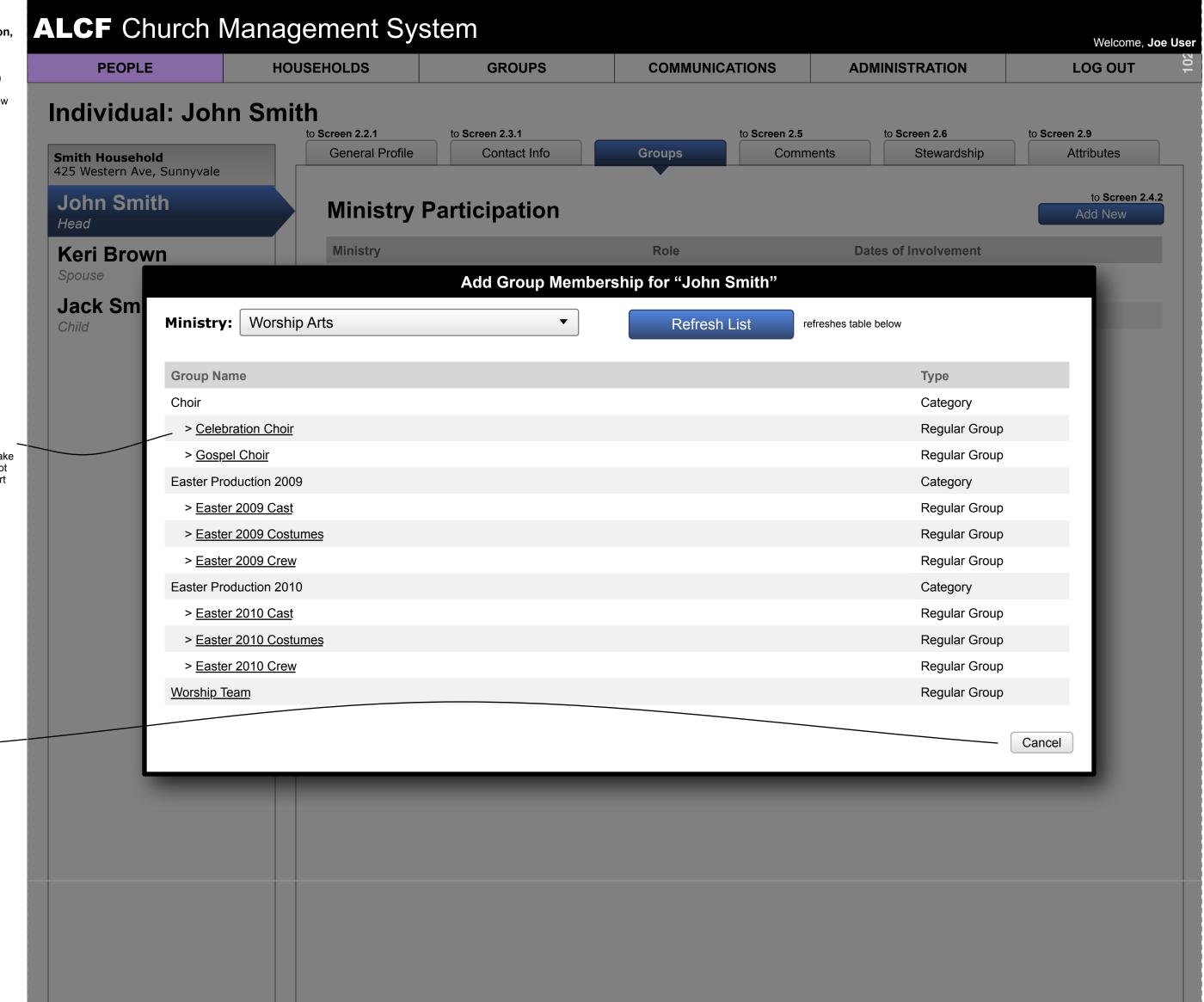
ALCF Church Management System IA Membership Subsystem 2.4.2 Edit Individual, Ministry Participation, Add

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**.





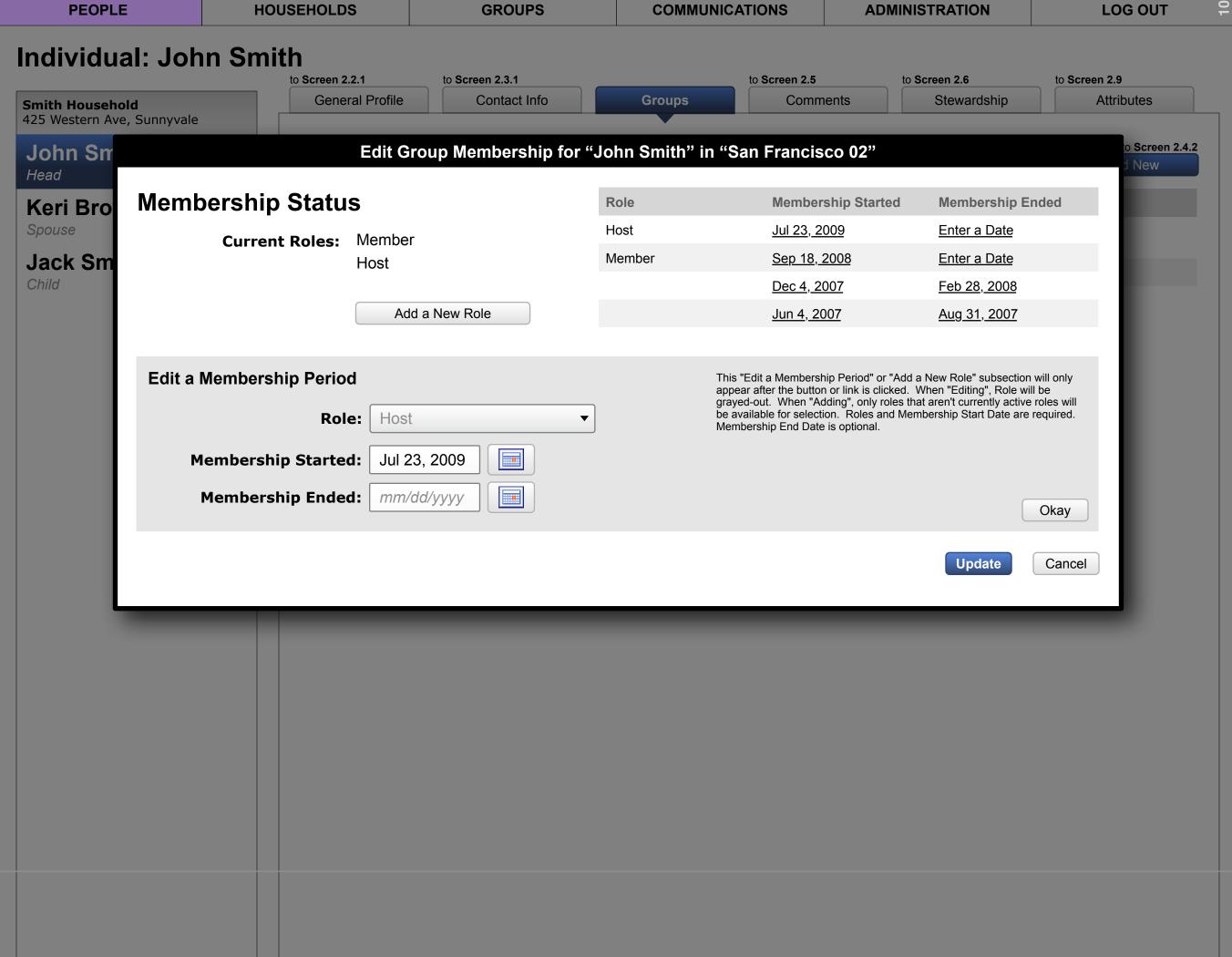
ALCF Church Management System IA Membership Subsystem 2.4.3 Edit Individual, Ministry Participation

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

Welcome, Joe User



768 px

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

Welcome, Joe User

HOUSEHOLDS PEOPLE GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT Individual: John Smith to Screen 2.3.1 to Screen 2.2.1 to Screen 2.5 to Screen 2.6 to Screen 2.9 General Profile Contact Info Groups Comments Stewardship Attributes **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.4.2 **John Smith Ministry Participation** Head Ministry Role **Dates of Involvement** Keri Brown Spouse April 2009 - Present Volunteer Safari Kids May 2007 - September 2008 **Jack Smith** Growth Groups > Mountain View 2 Participant January 4, 2004 - Present Child Real World Young Adults Small Group Leader September 24, 2007 - May 2008 **Subscribe Individual to a Communication List** to Screen 2.4.4 Add New **Communication List:** Super Fun Social Committee Subscribe Cancel

View Change Log

Record last updated on February 23, 2009 by Doris Cohen

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to Screen 2.4.1

Groups

- View All -

2008-08-03

Comments

to Screen 2.9

Attributes

Add New

to Screen 2.5.1

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

"Posted By" filter will only list the names of users who have posted a comment on this individual.

"Comment Type" 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

"Hide" will hide the comment for all users. It can reappear if the user chooses to "include hidden comments" and then "unhides" the comment.

Individual: John Smith

425 Western Ave, Sunnyvale

to Screen 2.2.1

General Profile

- View All -

[Unhide]

John Smith Head

Smith Household

Keri Brown

Spouse

Jack Smith

Child

Comments and Notes

Filter by Posted By:

to Screen 2.3.1

Contact Info

Filter by Comment Type: Filter by Hidden State:

✓ Include HIdden Comments

Maecenas egestas, mauris sit amet suscipit pretium, massa

lacus facilisis eros, eu sodales dui eros eu nisl. Curabitur

quis metus. Mauris lectus. Quisque erat nunc.

to Screen 2.6

Stewardship

| Edit / Hide | Posted By | DATE v | Туре | Comment |
|-------------------|--------------------|------------|--------------|--|
| [Hide] | Ronalda Lee | 2001-02-21 | Staff | In hac habitasse platea dictumst. Nullam commodo arcu sit amet turpis. In hac habitasse platea dictumst. Proin sem neque, adipiscing vel, commodo et, tempus vitae, purus. Aliquam vitae libero. Phasellus quis urna quis turpis. |
| [Hide] | Ramon O'Reilly | 2001-09-12 | Confidential | Ut euismod, urna ac rhoncus hendrerit, erat metus blandit nunc, vel molestie felis massa eget turpis. Suspendisse non elit. |
| [Hide] | Diane Bailey | 2002-05-04 | Staff | Suspendisse potenti. Maecenas sed urna. Morbi sagittis. Integer pellentesque lacus ut nibh. Integer ut libero. Praesent interdum, turpis quis faucibus sagittis. |
| [Hide] | Rudolph McLaughlin | 2003-07-31 | Staff | Pellentesque in mauris. Ut euismod, urna ac rhoncus hendrerit, erat metus. |
| [Edit] [Hide] | Lauren Nelson | 2004-02-29 | Confidential | Fusce iaculis, urna sit amet hendrerit imperdiet, erat nulla placerat metus, ut pretium sapien lectus sed urna. Pellentesque eu sem. Suspendisse potenti. Praesent. |
| [Hide] | Hayes Griffin | 2004-09-26 | General | Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Fusce fringilla. Nunc posuere felis id nisi. Vestibulum. |
| [Hide] | Connie Jenkins | 2005-09-07 | Confidential | Nam id enim. Suspendisse condimentum. Praesent in ipsum eu massa tempus euismod. Mauris pulvinar. Suspendisse potenti. Sed sollicitudin, quam ut pulvinar posuere, ipsum. |
| [<u>Unhide</u>] | Ilana Doyle | 2007-03-04 | Confidential | Ut et risus quis justo iaculis vestibulum. Ut sapien eros, gravida nec, placerat et, luctus eu, libero. Mauris. |
| [Hide] | Aspasia Power | 2007-03-11 | Staff | Integer mollis. Aliquam erat volutpat. Vivamus eget magna. Aenean blandit. Fusce nisi arcu, rutrum a, ultrices ac, convallis quis, nisl. Aliquam ultricies accumsan urna. Phasellus varius dolor. Vestibulum mollis, sapien et varius hendrerit, nisl. |
| | | | | In porta rhoncus libero. Mauris tristique lacinia tellus. |

General

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Record last updated on February 23, 2009 by Doris Cohen

Tavy Smith

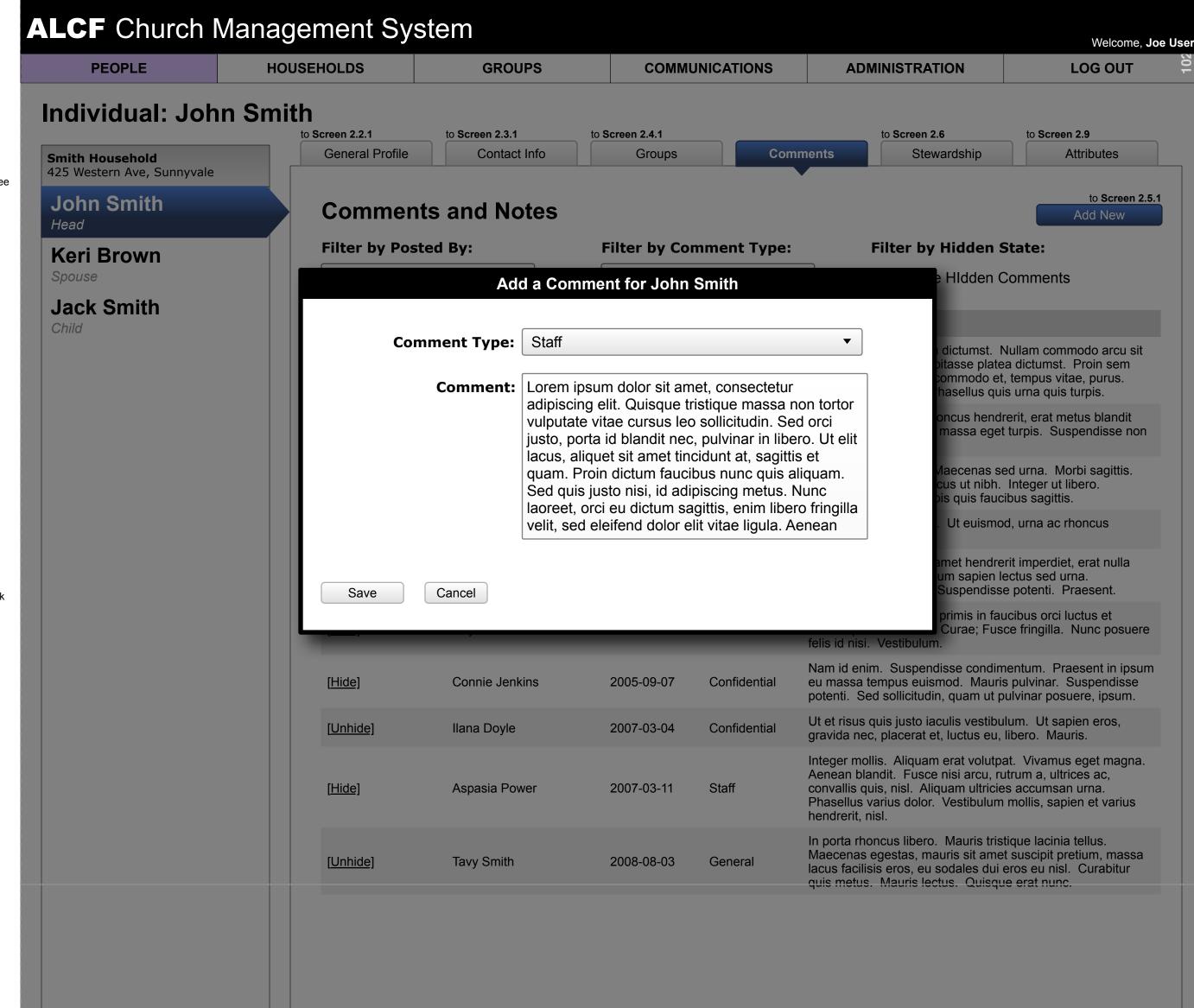
Edit an Individual - Comments

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.

Comment Types dropdown is limited to the comment types that the user is allowed to see. See Screen 2.5 for more information on Comment Types.

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





HOUSEHOLDS

to Screen 2.2.1

- View All -

GROUPS

to Screen 2.3.1

to Screen 2.9

✓ View contributions by

all household members

ADMINISTRATION

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:

- Cash
- 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 tax-deductible 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** for more information.

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 Tue Jan 19 2010 Page 26 of 53



Individual: John Smith



Keri Brown

Smith Household

PEOPLE

Spouse

Jack Smith

Child

| Date Range: | Filter by | Fund: | Filter by Transaction | n Type: View | Entire Household: | |
|-----------------|--------------|--------|--|--------------|-------------------------|--|
| Stewardshi | р | | report of the list of transaction //iven the specified filtering criteria. | | to Screen 2.6. 2 | |
| | | | | | | |
| General Profile | Contact Info | Groups | Comments | Stewardship | Attributes | |

to Screen 2.5

- View All -

COMMUNICATIONS

to Screen 2.4.1

- View All -

| <u>DATE</u> 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 |
| <u>2003-09-04</u> | 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 <u>#2498</u> | \$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 |

768 px

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

Edit Individual – Stewardship

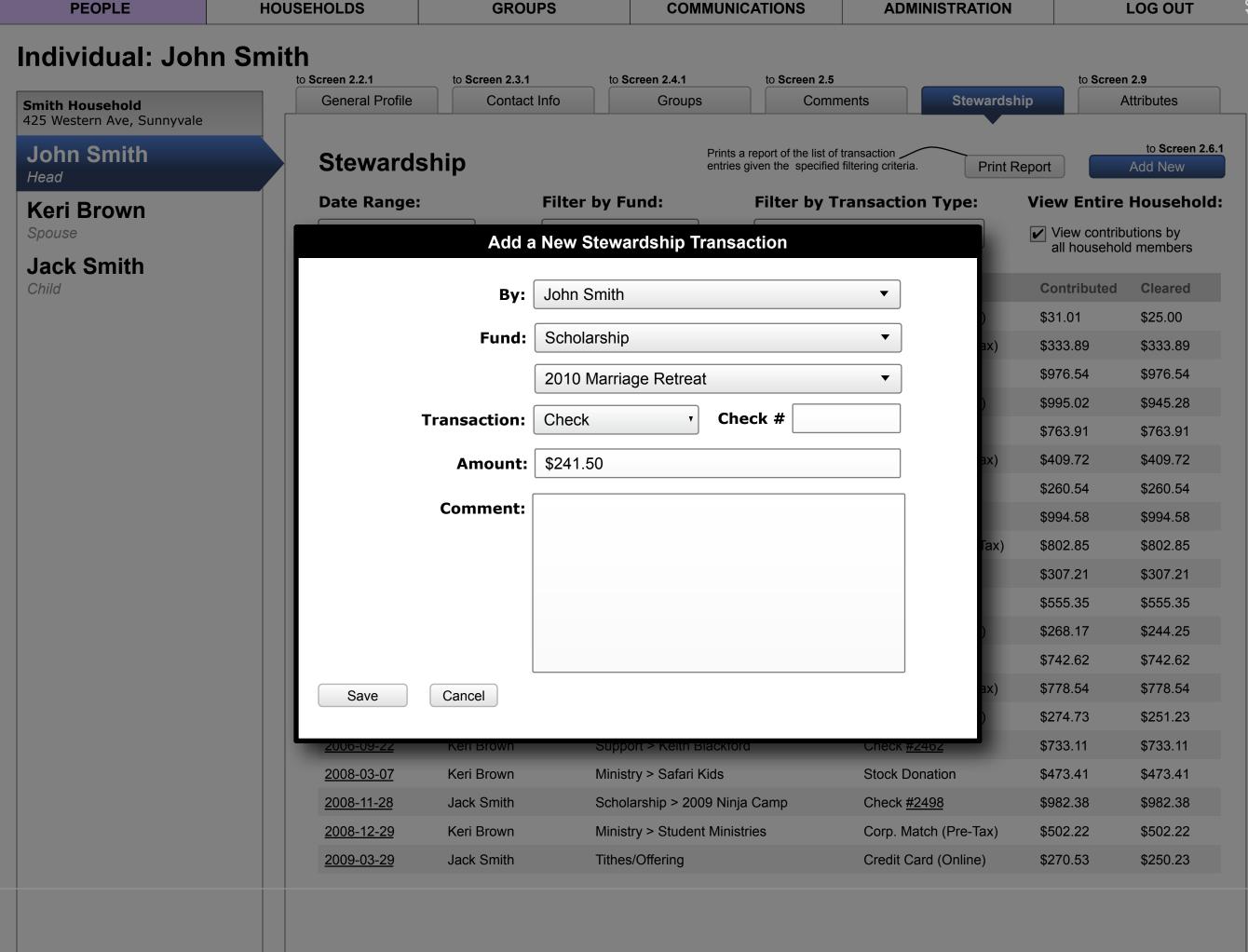
This dialog box allows the user to view, edit or even delete a transaction.

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

Welcome, Joe User



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Record last updated on February 23, 2009 by Doris Cohen

<u>View Change Log</u>

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

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

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.

| <u>First Name</u> | LAST NAME v | Membership Status | Address | <u>City</u> |
|-------------------|--------------|-------------------|-------------------------------|----------------|
| <u>Jonathan</u> | Bubba-Smith | Non-Member | 41098 Mill Valley Way | Anderson |
| <u>Joe</u> | <u>Smith</u> | 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 Refresh List refreshes table below - View All Statuses -First Name Last Name

Results: Viewing people 1-20 of 2141. Previous | Next **LAST NAME** v **Membership Status Address** First Name City 41098 Mill Valley Way Anderson <u>Page</u> <u>Alexander</u> Non-Member Non-Member 1040 La Canada Flintridge Dr. <u>Silvanus</u> **Barry** Hercules **Barry** Non-Member/Tithe 76207 Walnut Ave. Irwindale <u>Susy</u> <u>Walden</u> <u>Barry</u> Non-Member 31558 Kerman Blvd. East Palo Alto Member 30811 Palm Springs Road Bell <u>Benedict</u> <u>Bennett</u> **Brooks** Member 88436 Mountain View Road Commerce <u>Dandy</u> <u>Buckley</u> Non-Member 54019 Industry Ave. Capitola <u>Burleigh</u> 59216 Reedley Dr. **Burke** Non-Member/Tithe Antioch <u>Bass</u> Member 30200 Elk Grove St. Agoura Hills <u>Amorita</u> **Chang Worthington** Coleman Non-Member/Tithe 25835 Emeryville Blvd. Hillsborough <u>Lula</u> **Collins** Non-Member 80939 Canyon Lake Dr. Colton 2279 Sonora Road Lakeport <u>Minna</u> <u>Cook</u> Member <u>Tilda</u> <u>Cullen</u> Non-Member 83531 Chico Blvd. Biggs 54957 Hughson Way Laguna Niguel Russell Cunningham Member 56850 El Cajon Road West Sacramento <u>Abbie</u> <u>Davis</u> Non-Member/Tithe

33924 Fullerton St.

37431 Santa Monica St.

65033 Cudahy Blvd.

41077 Dorris Dr.

Non-Member/Tithe

Non-Member/Tithe

Member

Non-Member

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La Mesa

Truckee

Salinas

Blythe

Welcome, Joe User

<u>Griz</u>

<u>Martie</u>

<u>Bowie</u>

<u>Toinette</u>

<u>Davis</u>

<u>Davis</u>

Doherty

Donnelly

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 records.

ALCF Church Management System

HOUSEHOLDS

GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Merge Individuals: "John Smith"

Jonathan Smith 202 Long Drive, San Francisco **John Smith** 202 Longg Street, San Francisco

Households

PEOPLE

✓ 202 Long Drive, San Francisco with Karen Jones-Smith, Samantha Jones-Smith 202 Longg Street, San Francisco with Karen Smith

Addresses

Current Work 2180 Salley Street, Mountain View Previous Work 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

Birthday: Feb 11, 1977

Member since July 2, 2008

Married to Karen Smith since 1/21/2004

O Birthday: Feb 11

Non-Member

Merge will go ahead and perform the merge.

Merge and Cancel will eventually redirect the user back to the Screen 2.2.x that is appropriate for this individual record.

Merge

768 px

Cancel

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Welcome, Joe User

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? If so, please select the household that it matches. Otherwise, click on "None Found – Create as a New Household" below.

| 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 |

None Found – Create as a New Household

Back

Cancel

ALCF

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

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

Attribute "Types" include:

- Date
- 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**

ALCF Church Management System

to Screen 2.2.1

General Profile

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

Groups

to Screen 2.5

Comments

to Screen 2.6

Stewardship

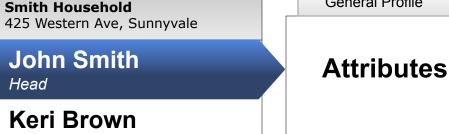
Welcome, Joe User

Attributes

Add New

to Screen 2.9.2

Individual: John Smith



Spouse **Jack Smith**

Child

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

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768 px Record last updated on February 23, 2009 by Doris Cohen

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

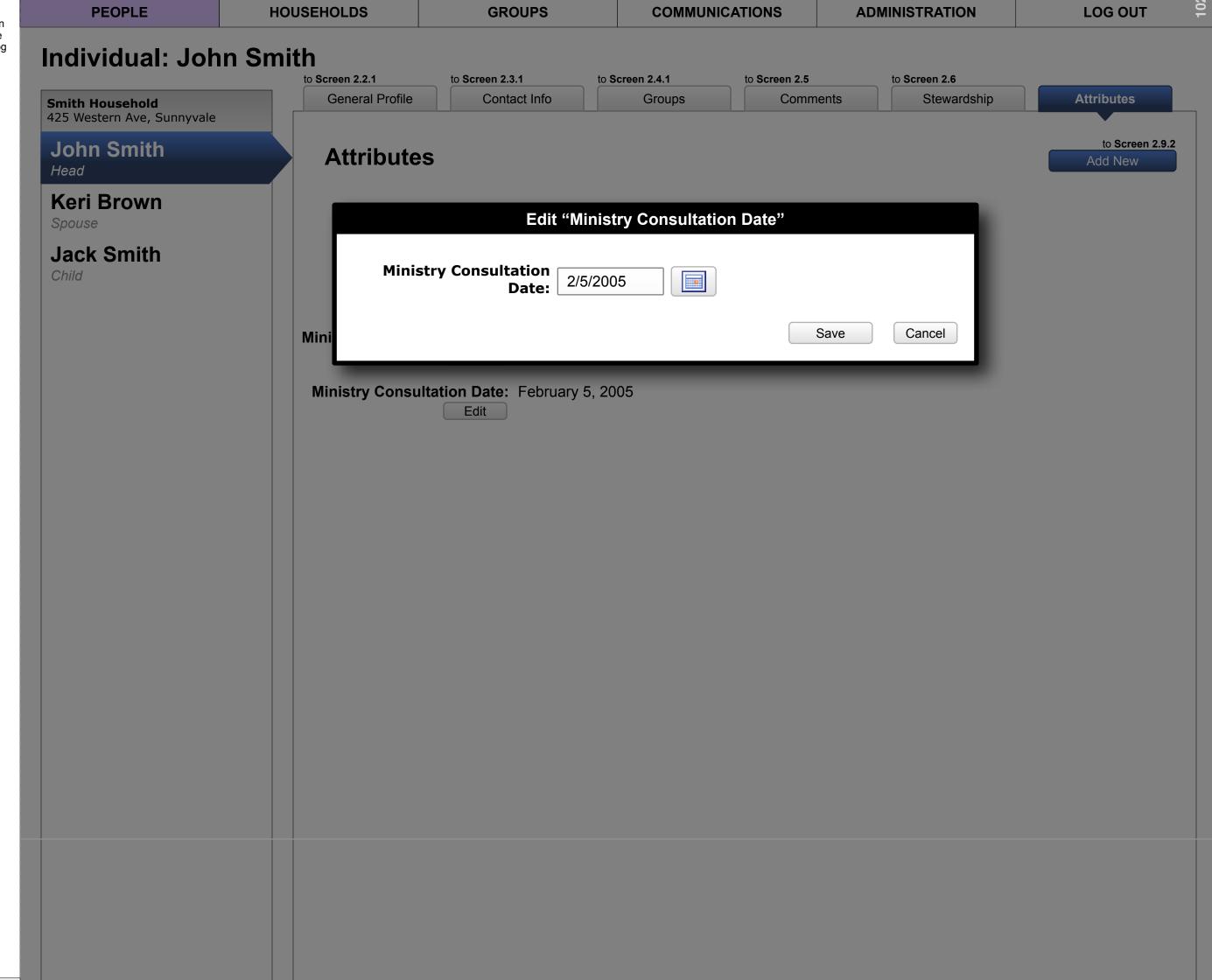
View an Individual – Edit Attributes

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.**.

ALCF Church Management System

Welcome, Joe User



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

View an Individual – Add an Attribute

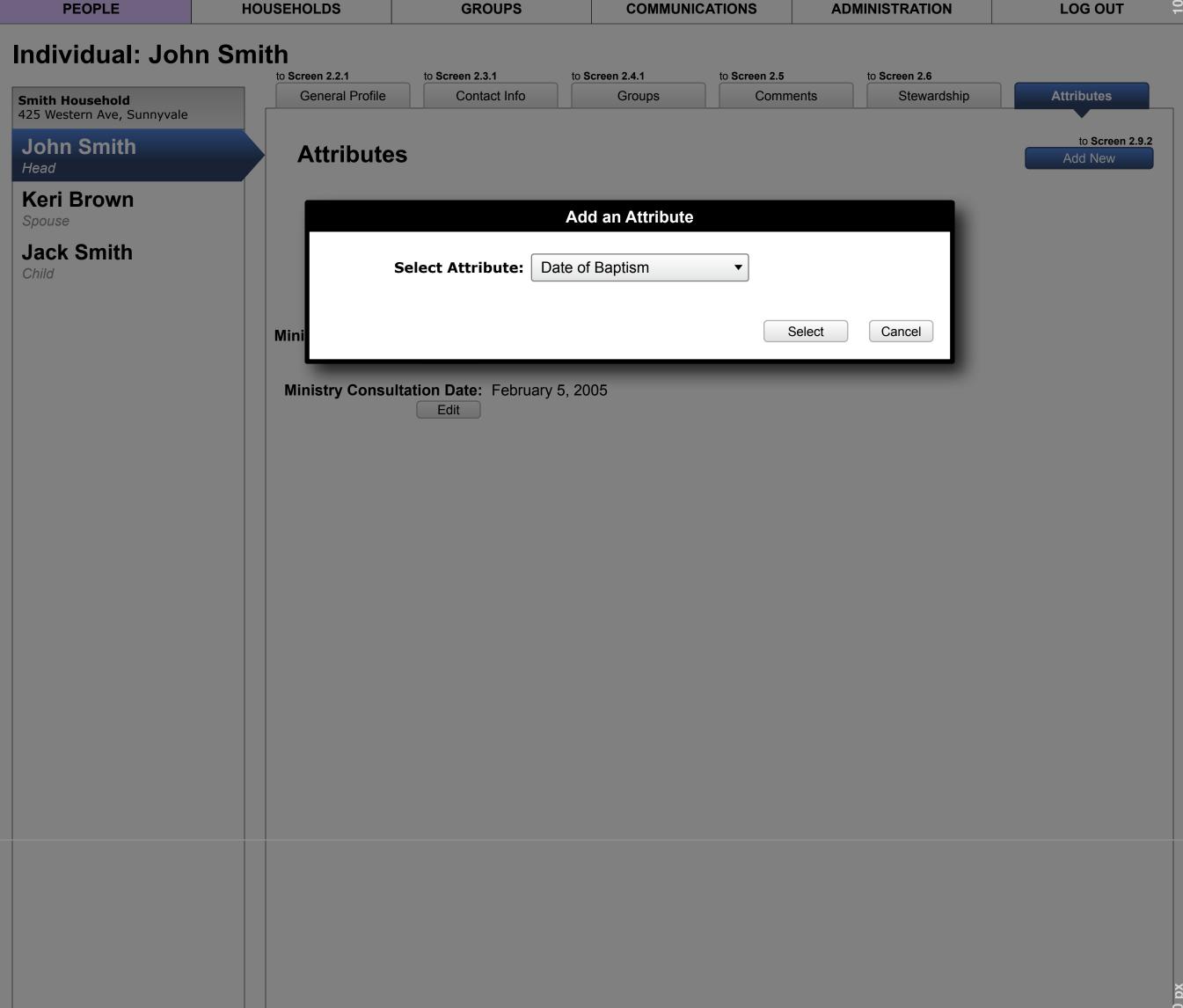
The list of available attributes is managed by a ChMS Administrator – see **Screen 2.9** for more notes on other attributes.

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

Welcome, Joe User



View Change Log

Record last updated on February 23, 2009 by Doris Cohen

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768 px

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

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 COMMUNICATIONS ADMINISTRATION LOG OUT

Search for a Household

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

| Results: Viewing households 1-2 | | City | Mambara | <u>Previous</u> <u>Next</u> |
|---------------------------------|-----------------------------|---------------------|---|-------------------------------|
| 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 | |
| <u> Campbell - Individual</u> | 27444 Point Arena Terrace | lone | 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 | |

Welcome, Joe User

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

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

within rules for a household.

Screen 2.2 for that individual.

LOG OUT PEOPLE GROUPS HOUSEHOLDS COMMUNICATIONS ADMINISTRATION

Household: John Smith Household

ALCF Church Management System

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

Household Members

to Screen 3.3 Edit Roles

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

Home Address and Phone for the John Smith Household

to Screen 3.4 Add New

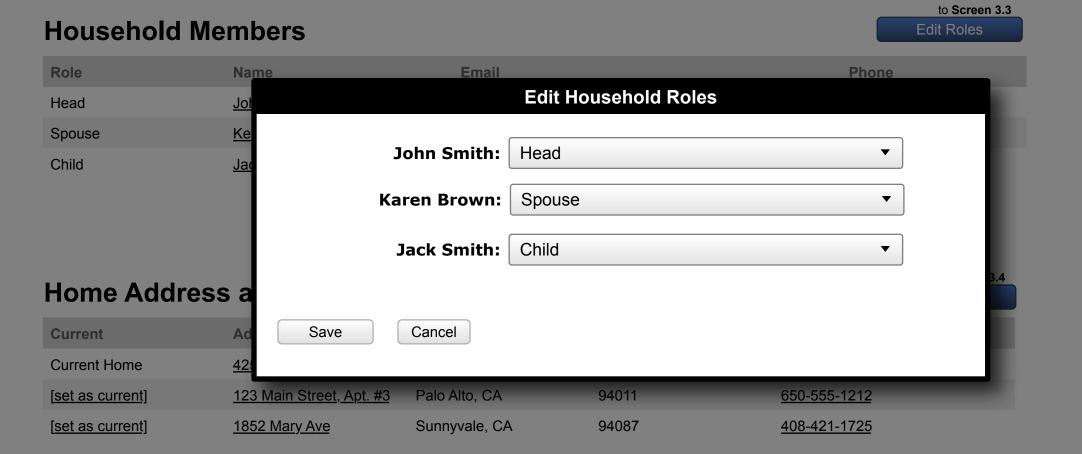
| Current | Address | City/State | Zip Code | Home Phone | |
|------------------|--------------------------|---------------|----------|---------------------|--|
| Current Home | 425 Western Ave | Sunnyvale, CA | 94086 | <u>408-555-1212</u> | |
| [set as current] | 123 Main Street, Apt. #3 | Palo Alto,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

to Screen 3.5 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

Welcome, Joe User
PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Household: John Smith Household



to Screen 3.5
Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

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

Edit Household – Address and Phone

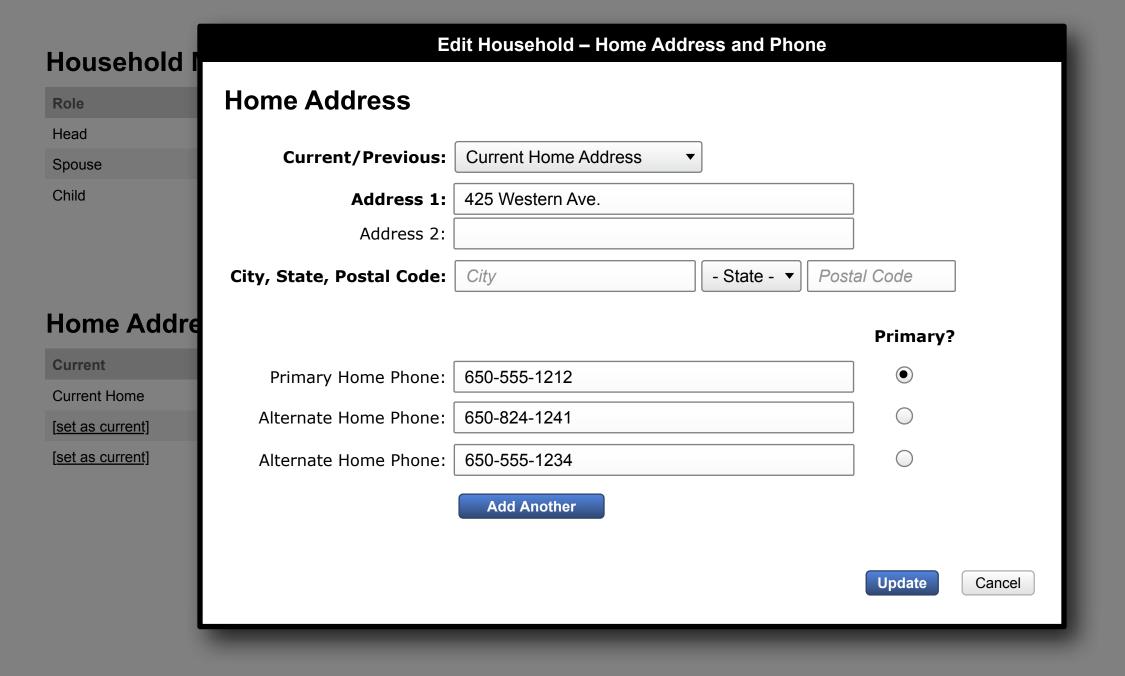
The interactions here match the interactions from **Screen 2.3.2**.

ALCF Church Management System

Welcome, Joe User

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Household: John Smith Household



to Screen 3.5

Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

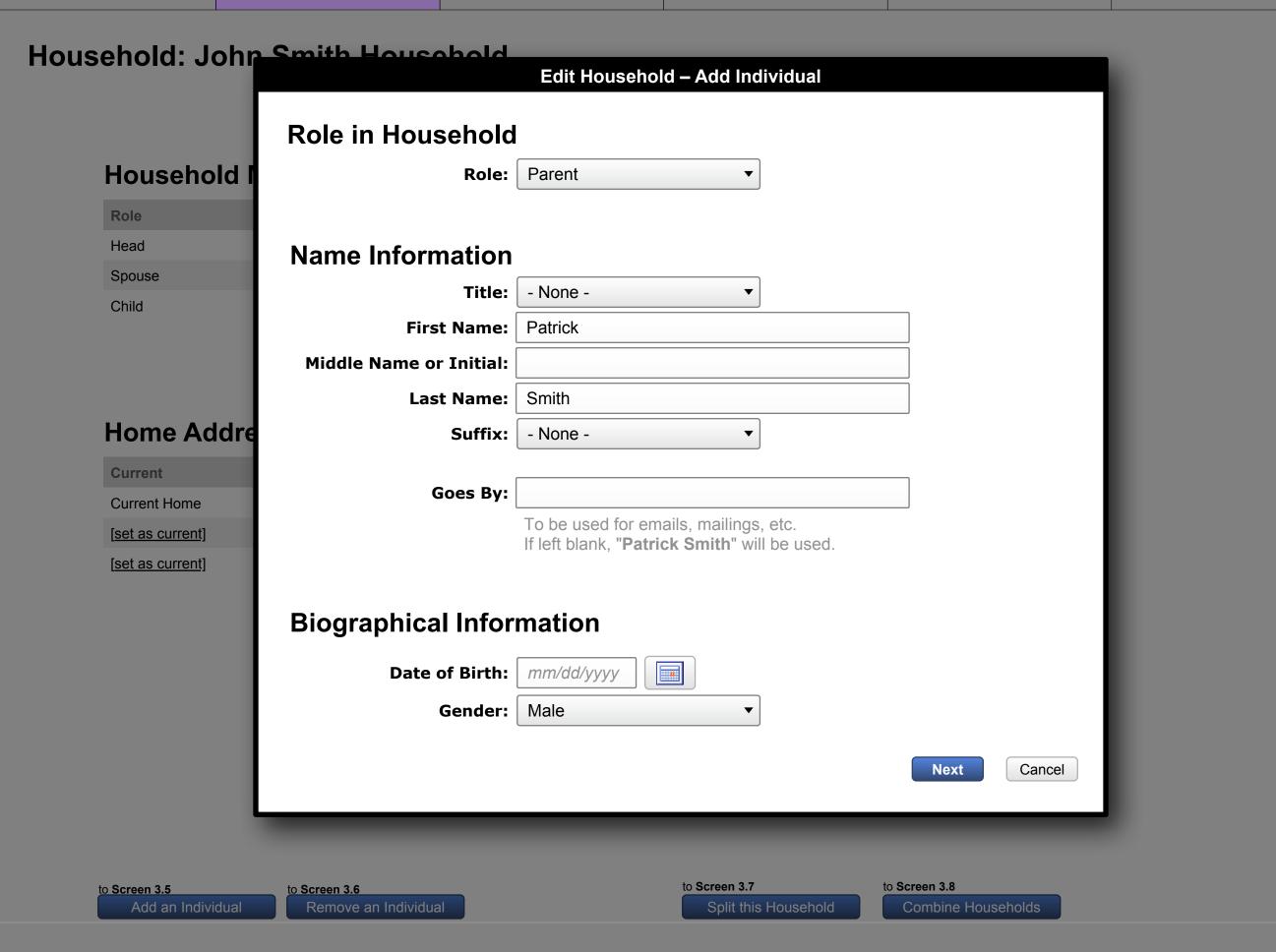
Combine Households

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

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT



ChMS Main IA.graffle Tue Jan 19 2010 Page 39 of 53

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.

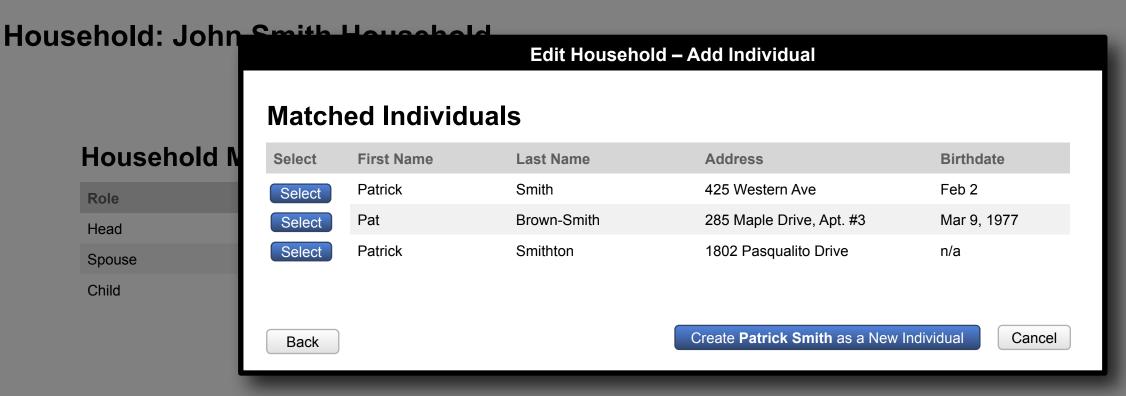
"Select" will have the system check to see if the individual is already part of a multi-person household:

- * 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



Home Address and Phone for the John Smith Household

Add New

to Screen 3.4

| 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 | <u>650-555-1212</u> |
| [set as current] | 1852 Mary Δνρ | Sunnyvale CA | 04087 | 408_421_1725 |

to Screen 3.5
Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

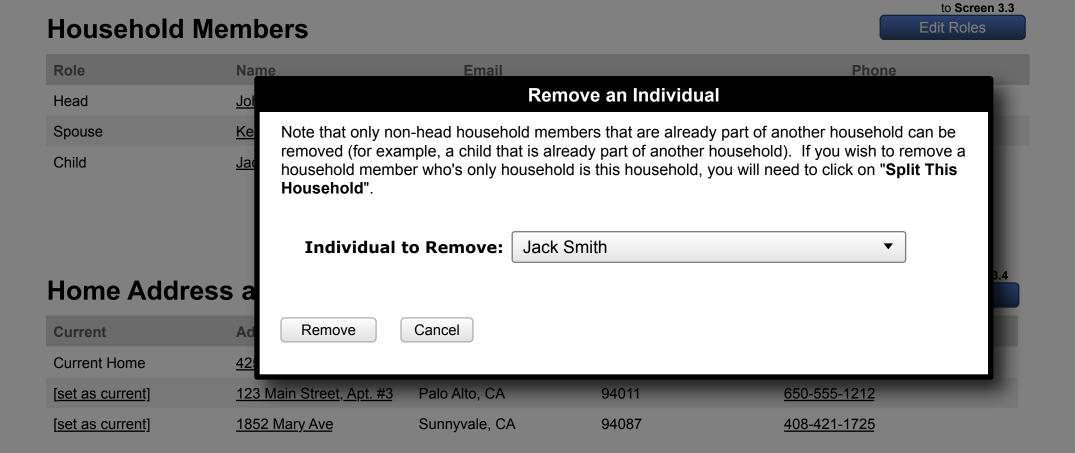
Split this Household

to Screen 3.8

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Household: John Smith Household



to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household to Screen 3.8

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Lait Household – Oplit Household

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.

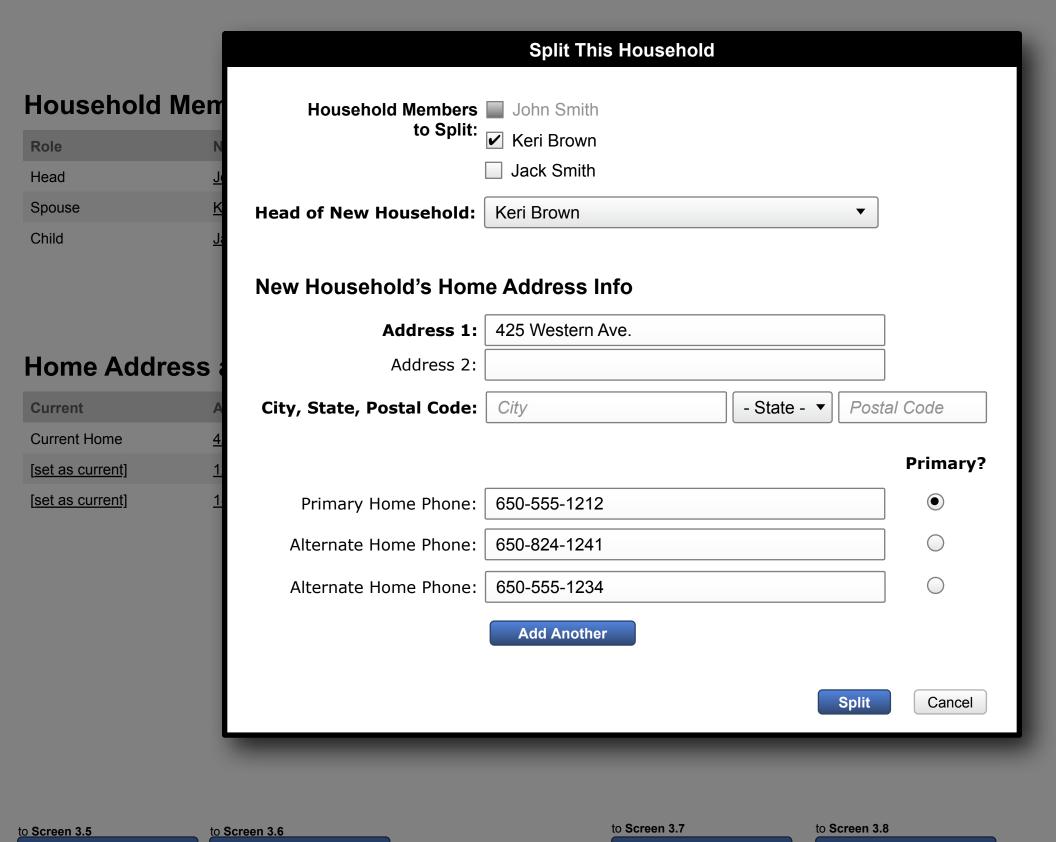
Current home address information for this household will remain unchanged.

After hitting "Split", the dialog box will close, redirecting the user to Screen 3.2 for the old household. However, as a convenience a notice of the split 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



Split this Household

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,

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

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.

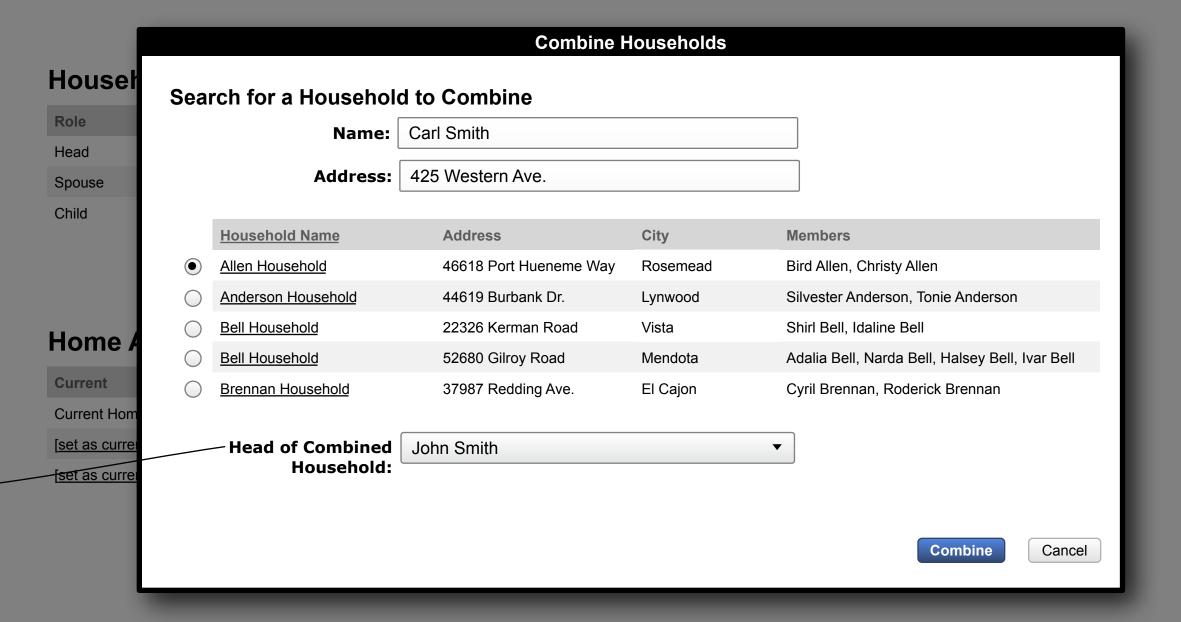
After hitting "Merge", the dialog box will close, redirecting the user to **Screen 3.2** for the combined household. If there is any old "Recently Split from..." messaging on either household, that will no longer appear.

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

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION

Household: John Smith Household



to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household to Screen 3.8

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

- * **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

- * 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.

ALCF Church Management System

PEOPLE

HOUSEHOLDS GROUPS COMMUNICATIONS LOG OUT ADMINISTRATION

View Groups in "Worship Arts"

Ministry: Worship Arts Refresh List refreshes table below

| Group Name | Туре | Email |
|------------------------|---------------|--|
| <u>Choir</u> | Category | Announce Only – <u>choir@groups.alcf.net</u> |
| > Celebration Choir | Regular Group | Announce Only – <u>celebration.choir@groups.alcf.net</u> |
| > Gospel Choir | Regular Group | Announce Only – gospel.choir@groups.alcf.net |
| Easter Production 2009 | Category | Announce Only – easter-2009@groups.alcf.net |
| > Easter 2009 Cast | Regular Group | Announce Only – easter-2009-cast@groups.alcf.net |
| > Easter 2009 Costumes | Regular Group | Announce Only – easter-2009-costumes@groups.alcf.net |
| > Easter 2009 Crew | Regular Group | Announce Only – <u>easter-2009-crew@groups.alcf.net</u> |
| Easter Production 2010 | Category | Announce Only – <u>easter-2010@groups.alcf.net</u> |
| > Easter 2010 Cast | Regular Group | Announce Only – easter-2010-cast@groups.alcf.net |
| > Easter 2010 Costumes | Regular Group | Announce Only – easter-2010-costumes@groups.alcf.net |
| > Easter 2010 Crew | Regular Group | Announce Only – <u>easter-2010-crew@groups.alcf.net</u> |
| Worship Team | Regular Group | Private List – worship-team@groups.alcf.net |
| | | |

Screen 4.2.1 ~ 4.2.5 (depending on the Group type)

clicking on any item will take user to

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 4.1.2 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 Refresh List refreshes table below

| Group Name | Туре | Email |
|--------------------------------------|---------------|--|
| Growth Groups | Category | Announce Only – gg@groups.alcf.net |
| > <u>Peninsula</u> | Category | |
| > San Francisco 01 | Regular Group | Private List – gg.sf01@groups.alcf.net |
| > <u>San Francisco 02</u> | 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 a New Group for Type:

Regular Group

Create

View Roles in Worship Arts

to Screen 4.5

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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 – <u>gg@groups.alcf.net</u>

CONFIDENTIAL

only displayed if group is "Confidential"

to Screen 4.3.1

Welcome, Joe User

Edit

Groups in this Category

| Group Name | Туре | Email |
|---------------------------|---------------|--|
| <u>Peninsula</u> | Category | none |
| > <u>San Francisco 01</u> | Regular Group | Private List – gg.sf01@groups.alcf.net |
| > San Francisco 02 | Regular Group | Private List – gg.sf02@groups.alcf.net |
| 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 |

Members in the Groups in this Category

| | • | <u> </u> | | |
|------------------|-----------------|----------------------------------|---------------------------------------|-----------------------|
| First Name | Last Name | Email | Group(s) | Role(s) |
| <u>Reseda</u> | <u>Adams</u> | radams3769@sbcglobal.net | Mountain View 01 | Member |
| <u>Bianca</u> | <u>Anderson</u> | biancaa5054@aol.com | San Francisco 02 | Member |
| <u>Helen</u> | <u>Anderson</u> | handerson5214@hotmail.com | San Francisco 02 and Mountain View 01 | Faciliator and Member |
| <u>Bertina</u> | <u>Baker</u> | bbaker685@rice.edu | Palo Alto 01 | Member |
| <u>Estra</u> | <u>Barry</u> | estrab5615@earthlink.net | Mountain View 01 | Member |
| <u>Adal</u> | <u>Bell</u> | abell5978@sbcyahoo.com | Palo Alto 01 | Host |
| <u>Josephine</u> | <u>Bennett</u> | josephineb1823@mail.nasa.gov | Mountain View 01 | Member |
| <u>Carly</u> | <u>Boyle</u> | carly.boyle8193@gmail.com | San Francisco 01 | Faciliator |
| <u>Florinda</u> | <u>Brady</u> | fbrady5889@attmail.com | San Francisco 01 | Member |
| <u>Salena</u> | <u>Brooks</u> | salena.brooks4331@rocketmail.com | San Francisco 02 and Mountain View 01 | Member |
| <u>Bina</u> | <u>Brown</u> | bina.brown8127@mail.nasa.gov | San Francisco 02 and Mountain View 01 | Faciliator and Member |
| Ollie | <u>Brown</u> | ollieb8308@excite.com | San Francisco 02 | Member |
| <u>Owen</u> | <u>Burns</u> | owenb213@lycos.com | San Francisco 01 | Member |
| Rosalie | <u>Burns</u> | rosalieb9352@rocketmail.com | San Francisco 01 | Member |
| <u>Barbara</u> | <u>Butler</u> | bbutler7368@earthlink.net | Mountain View 01 | Faciliator |
| Alice | <u>Carter</u> | alice.carter8397@attmail.com | San Francisco 01 | Member |
| <u>Neal</u> | <u>Carter</u> | neal.carter8613@attmail.com | San Francisco 02 | Host |
| <u>Virginia</u> | <u>Casey</u> | vcasey8472@rocketmail.com | San Francisco 02 and Mountain View 01 | Member and Host |
| <u>Malva</u> | <u>Chan</u> | malva.chan5081@rice.edu | San Francisco 01 | Member |
| Perce | <u>Chang</u> | pchang7735@excite.com | San Francisco 02 and Mountain View 01 | Faciliator |





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

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>

Members in this Group

to Screen 4.4.2
Add a Member

Welcome, Joe User

to Screen 4.3.1

| Edit | First Name | Last Name | Email | Current Role(s) |
|---------------|---------------|-----------------|------------------------------------|-----------------------|
| <u>Edit</u> | Adrian | <u>Dwyer</u> | adriand4787@sbcyahoo.com | Member and Host |
| <u>Edit</u> | Albin | <u>Kennedy</u> | albink3514@aol.com | Member |
| — <u>Edit</u> | <u>Algie</u> | <u>O'Keeffe</u> | algieo5839@aol.com | Member |
| <u>Edit</u> | <u>Barnet</u> | <u>Hall</u> | bhall6400@lycos.com | Member |
| <u>Edit</u> | Beck | <u>Power</u> | bpower1881@northwestern.edu | Member |
| <u>Edit</u> | <u>Bessie</u> | <u>Hall</u> | bhall7757@rocketmail.com | Member |
| <u>Edit</u> | <u>Bret</u> | Shaw | bret.shaw5743@hotmail.com | Member |
| <u>Edit</u> | Burton | Long | burtonl6946@excite.com | Member |
| <u>Edit</u> | Cass | <u>Donnelly</u> | cass.donnelly7307@northwestern.edu | Member |
| <u>Edit</u> | Colton | Wright | cwright1882@gmail.com | Member |
| <u>Edit</u> | <u>Daff</u> | Bell | dbell6829@northwestern.edu | Member |
| <u>Edit</u> | <u>Della</u> | <u>Kenney</u> | dellak8136@excite.com | Member |
| <u>Edit</u> | <u>Dexter</u> | <u>Sweeney</u> | dexters8223@sbcyahoo.com | Member and Faciliator |
| <u>Edit</u> | <u>Donna</u> | Lee | dlee2597@aol.com | Member |
| <u>Edit</u> | <u>Drake</u> | Cook | drakec2240@gmail.com | Member |
| <u>Edit</u> | <u>Drina</u> | <u>Liu</u> | dliu2887@hotmail.com | Member and Faciliator |
| <u>Edit</u> | <u>Ebony</u> | <u>Hill</u> | ehill9983@earthlink.net | Member and Host |

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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

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

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Group Category "Growth Groups"

Ministry: Growth Groups

Parent Category: none

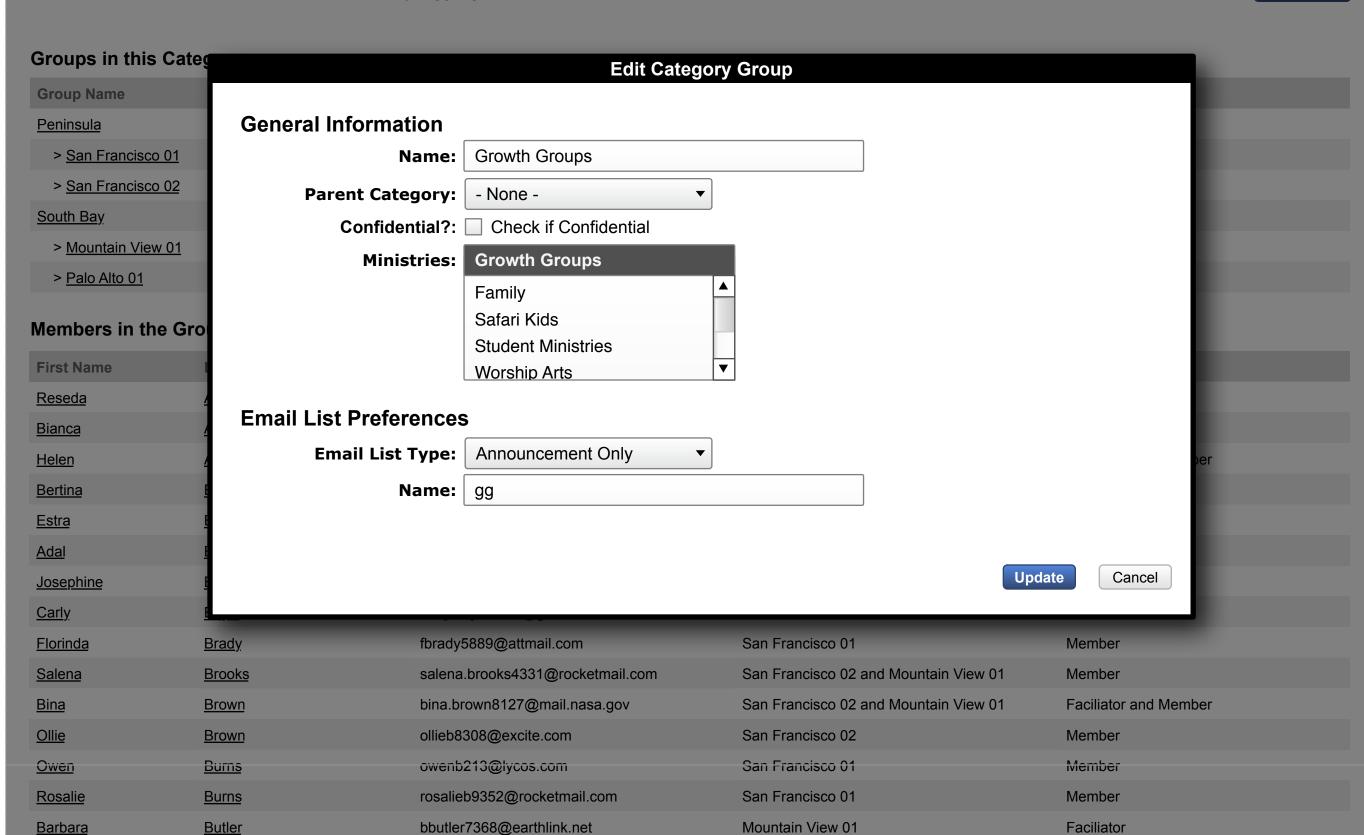
Email List Preferences: Announce Only – gg@groups.alcf.net

CONFIDENTIAL only displayed if group is "Confidential"

Welcome, Joe User

to Screen 4.3.1

Edit



San Francisco 01

San Francisco 02

San Francisco 01

San Francisco 02 and Mountain View 01

San Francisco 02 and Mountain View 01

Member

Member

Faciliator

Member and Host

Host

alice.carter8397@attmail.com

neal.carter8613@attmail.com

vcasey8472@rocketmail.com

malva.chan5081@rice.edu

pchang7735@excite.com

<u>Alice</u>

<u>Neal</u>

<u>Virginia</u>

<u>Malva</u>

768 px

<u>Carter</u>

<u>Carter</u>

<u>Casey</u>

<u>Chan</u>

<u>Chang</u>

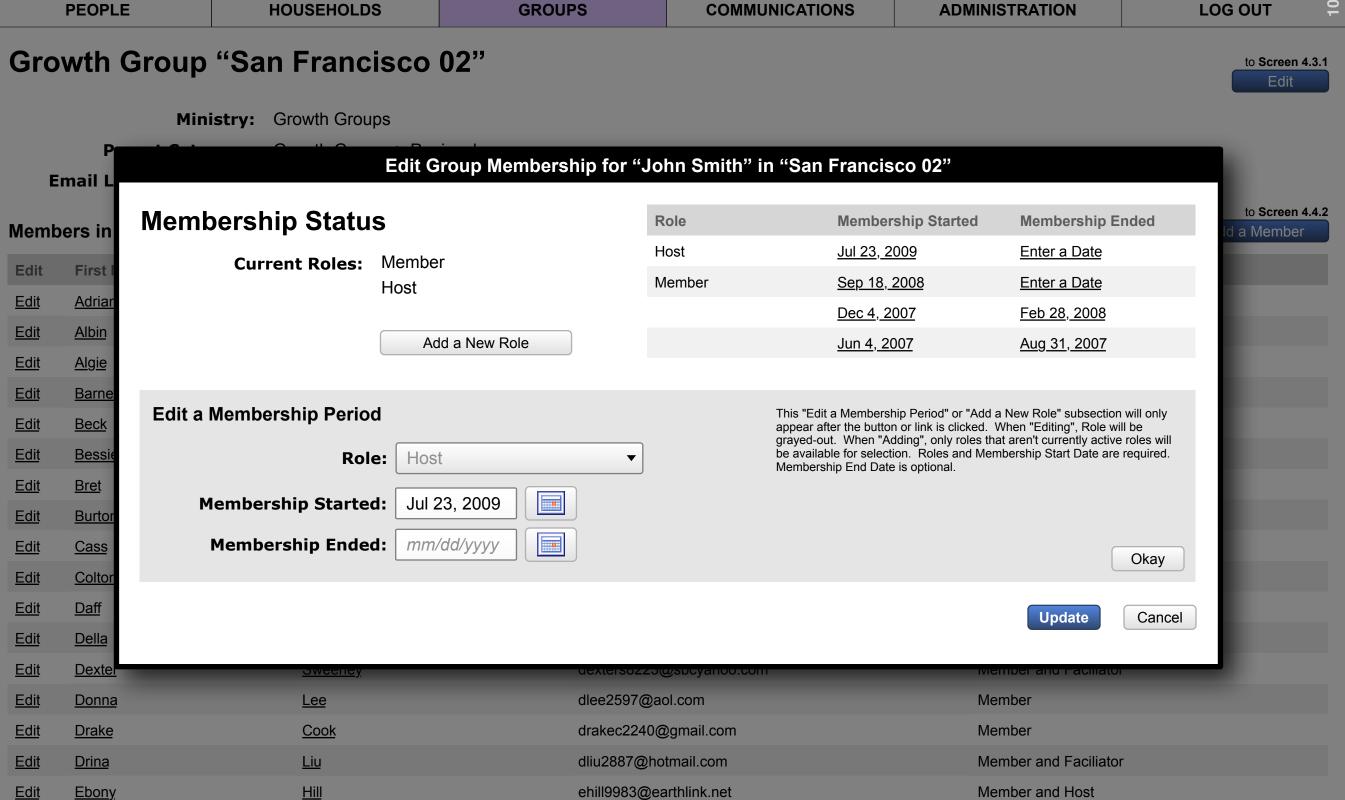
ALCF Church Management System IA Membership Subsystem 4.4.1 Edit Group Membership

Edit Group Membership

This screen is more or less the same for Regular

ALCF Church Management System

Welcome, Joe User



ChMS Main IA.graffle Tue Jan 19 2010 Page 49 of 53

<u>Edit</u>

Ebony

ALCF Church Management System IA Membership Subsystem 4.4.2 Add Group Membership

Add Group Membership

This screen is more or less the same for Regular

List of Roles is defined at the Ministry level.

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.

ALCF Church Management System

HOUSEHOLDS PEOPLE GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Add a New Member to "San Francisco 02"

Growth Group "San Francisco 02"

Ministry:

Parent Category:

Members in this Group

First Name

<u>Adrian</u>

<u>Albin</u>

<u>Algie</u>

<u>Barnet</u>

<u>Beck</u>

<u>Bessie</u>

Burton

<u>Cass</u>

Colton

Daff

<u>Della</u>

Dexter

<u>Donna</u>

<u>Drake</u>

<u>Drina</u>

Ebony

<u>Bret</u>

Edit

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

Edit

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

<u>Edit</u>

Edit

<u>Edit</u>

Role in Group Email List Preferences:

Membership Ended: *mm/dd/yyyy*

Membership Started:

Name Information

First Name: Jennifer

Middle Name or Initial:

Peterson **Last Name: Suffix:**

Goes By:

Role:

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

Contact Information

jpeterson@gmail.com **Email:**

Faciliator

- None -

- None -

Jenny Peterson

Jul 23, 2009

408-555-1212 Phone:

Cell Phone

Next

Cancel

Welcome, Joe User

to Screen 4.3.1

to Screen 4.4.2

Add a Member

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

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 yes, 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.

ALCF Church Management System

<u>Hill</u>

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Growth Group "San Francisco 02" to Screen 4.3.1 Add New Member to "San Francisco 02" **Ministry: Matched Individuals Parent Category: Email List Preferences:** Select **First Name Last Name Address** Email to Screen 4.4.2 425 Western Ave Jennifer Peterson none **Members in this Group** Select Add a Member Peterson-Smith 285 Maple Drive, Apt. #3 jps@hotmail.com Jen Select First Name Edit Pattyson 1802 Pasqualito Drive Select Jenny none **Edit** <u>Adrian</u> <u>Edit</u> <u>Albin</u> <u>Edit</u> <u>Algie</u> Create **Jenny Peterson** as a New Individual Cancel Back **Edit** <u>Barnet</u> bpower1881@northwestern.edu Member <u>Beck</u> Power <u>Edit</u> <u>Hall</u> bhall7757@rocketmail.com Member <u>Edit</u> <u>Bessie</u> bret.shaw5743@hotmail.com <u>Edit</u> <u>Bret</u> **Shaw** Member <u>Edit</u> **Burton** <u>Long</u> burtonl6946@excite.com Member Cass cass.donnelly7307@northwestern.edu Member <u>Edit</u> **Donnelly** Colton cwright1882@gmail.com Member <u>Edit</u> Wright dbell6829@northwestern.edu **Edit** Daff <u>Bell</u> Member dellak8136@excite.com Member <u>Edit</u> <u>Della</u> <u>Kenney</u> dexters8223@sbcyahoo.com Member and Faciliator <u>Edit</u> **Dexter** <u>Sweeney</u> dlee2597@aol.com Member <u>Edit</u> **Donna** <u>Lee</u> drakec2240@gmail.com Member <u>Edit</u> <u>Drake</u> Cook dliu2887@hotmail.com Member and Faciliator <u>Edit</u> <u>Drina</u>

ehill9983@earthlink.net



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Member and Host

Welcome, Joe User

<u>Edit</u>

Ebony

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.

Only roles that are not currently being used are

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 LOG OUT ADMINISTRATION

View Roles in "Worship Arts"

| Edit / Delete | Role |
|---------------|-------------|
| Edit Delete | Actor |
| Edit Delete | Leader |
| Edit Delete | Musician |
| Edit Delete | Participant |
| Edit Delete | Singer |

Role Name:

Add Role

updates the above list and saves changes

Back to View Groups

to Screen 4.1.1

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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 goes to Screen 6.2

View and Manage Users of the ChMS System



