### 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.

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.

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:

• 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

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

# **ALCF** Church Management System

**PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION** 

### Main Menu





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 goes to Screen 5.1

Administration goes to Screen 6.1

Manage administration tasks for the ALCF ChMS



### Search for an Individual

2.1 Search Individuals

This allows the user to search for an any individual

Each individual can be a membership status of

Member

- Child of Member
- Former Member
- None

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 will 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 - View All Statuses -Refresh List refreshes table below Last Name

Results: Viewing people 1-20 of 2141.				
First Name	LAST NAME v	Membership Status	Address	<u>City</u>
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	<u>Bennett</u>	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	<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	<u>Cunningham</u>	Member	54957 Hughson Way	Laguna Niguel
<u>Abbie</u>	<u>Davis</u>	Non-Member/Tithe	56850 El Cajon Road	West Sacramento
<u>Martie</u>	<u>Davis</u>	Non-Member/Tithe	33924 Fullerton St.	La Mesa
<u>Toinette</u>	<u>Davis</u>	Member	41077 Dorris Dr.	Truckee
<u>Bowie</u>	<u>Doherty</u>	Non-Member	37431 Santa Monica St.	Salinas
<u>Griz</u>	<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

**ChMS Main IA.graffle** Thu Jan 21 2010

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
- 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

Households with at least one adult must have one and only one adult 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 that household would not have a "head of household". This would be changed once the

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 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.



Welcome, Joe User

**PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION** 

### **Individual: John Smith**



Family Information:

Edit

to Screen 2.9

Attributes

to Screen 2.2.5

Prior membership from January 15, 2002 - March 28, 2003 Prior membership from April 12, 1996 - November 4, 1999

Married, to Keri Brown on June 24, 2006 (3 years) Sister: Joanna Smith-Stevens

Son: Jack Smith Mother: Percilla Smith

Father: Don Smith

**Household:** Head of the John Smith Household to Screen 3.2

**Primary Contact Info:** 425 Western Avenue

Sunnyvale, CA 94086 to Screen 2.3.1

> 408-555-1212 jsmith@gmail.com

Record last updated on February 23, 2009 by Doris Cohen

Edit

to Screen 2.2.5

Details

View Change Log

Merge Records

to Screen 2.7

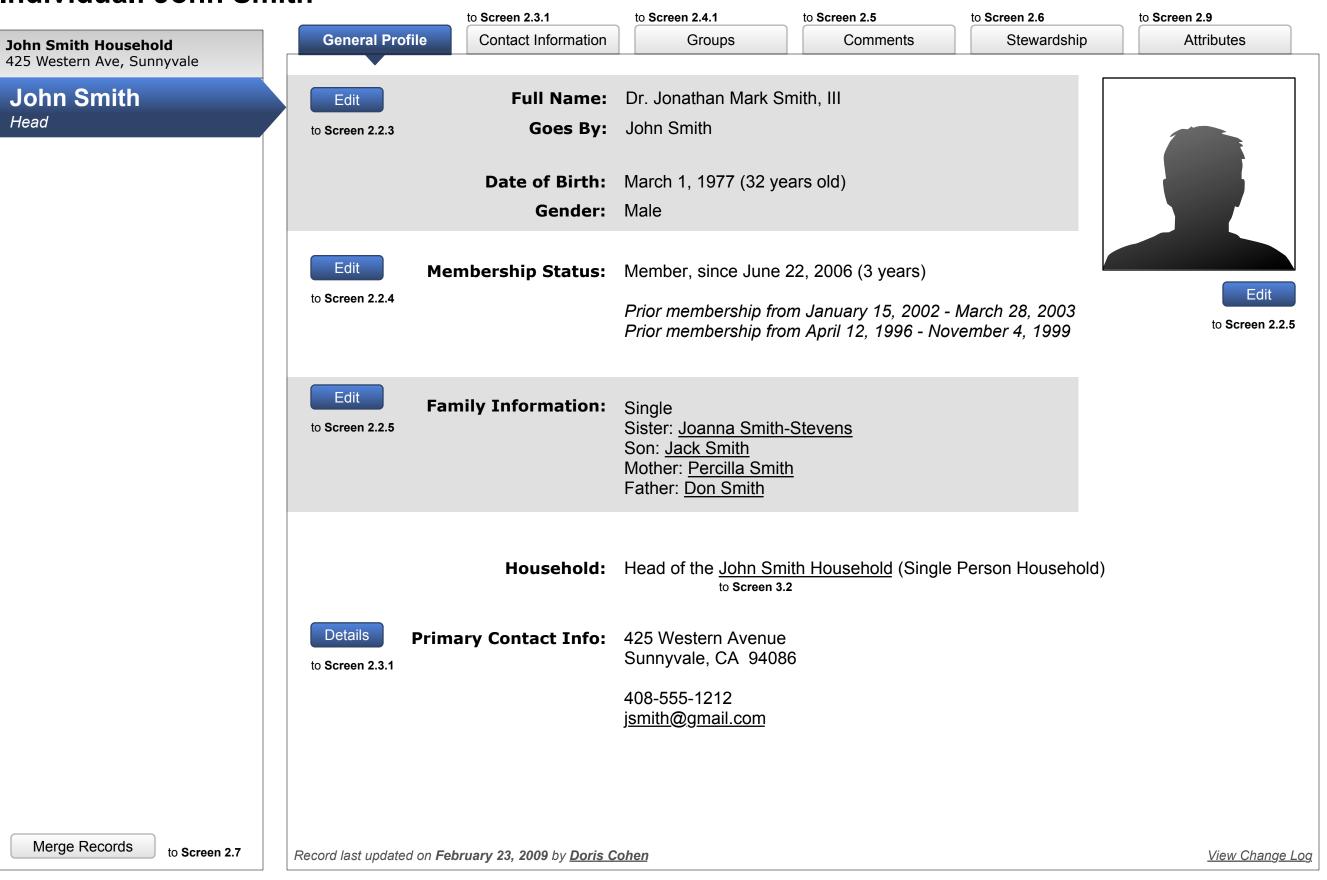
View an Individual – General Profile Tab Single-Person Household

See Screen 2.2 for notes.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

### **Individual: John Smith**



ChMS Main IA.graffle Thu Jan 21 2010 Page 5 of 53 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.

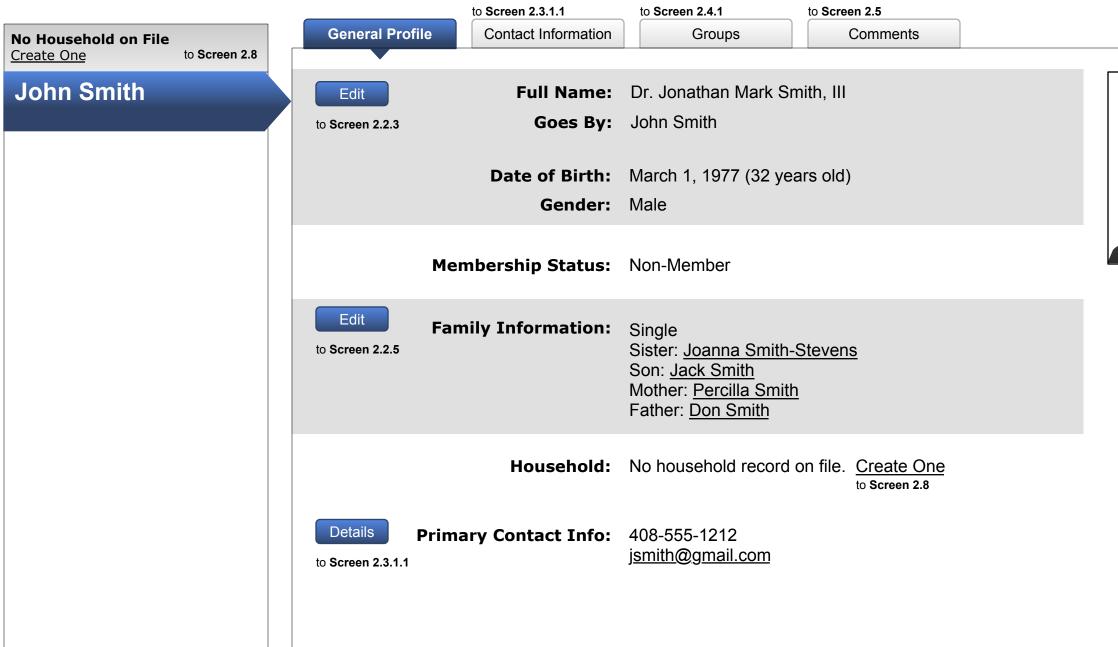
The only difference is that individuals without a household record on file can have a home phone associated with the individual. Otherwise, the home phone is normally associated with the household record.

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

# **ALCF** Church Management System

**PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT** 

### **Individual: John Smith**



Merge Records to Screen 2.7

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

Edit

to Screen 2.2.5

**ChMS Main IA.graffle** Thu Jan 21 2010 Page 6 of 53

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 HOUSEHOLDS COMMUNICATIONS ADMINISTRATION LOG OUT** 

**Individual: John Smith** 

**PEOPLE** 



Edit

to Screen 2.2.5

Details

to Screen 2.3.1

to Screen 2.3.1 to Screen 2.4.1 to Screen 2.5 to Screen 2.6 to Screen 2.9 **General Profile** Contact Information Stewardship Attributes Groups Comments Full Name: Jonathan Mark Smith, Jr. Edit Goes By: John Smith to Screen 2.2.3 **Date of Birth:** March 1, 2007 (2 years old) **Gender:** Male Edit Membership Status: Child of Member to Screen 2.2.4

to Screen 3.2

**Primary Contact Info:** 425 Western Avenue

Mother: Keri Smith

Father: Chris Smith

**Households:** Son in the Keri Smith Household

Sunnyvale, CA 94086

Son in the Rick Adams Household

Minor in the Amber Westfield Household

408-555-1212 jsmith@gmail.com

Record last updated on February 23, 2009 by Doris Cohen

Family Information: Single

View Change Log

Welcome, Joe User

Edit

to Screen 2.2.6

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.

Thu Jan 21 2010 Page 7 of 53

### Edit an Individual – General Information

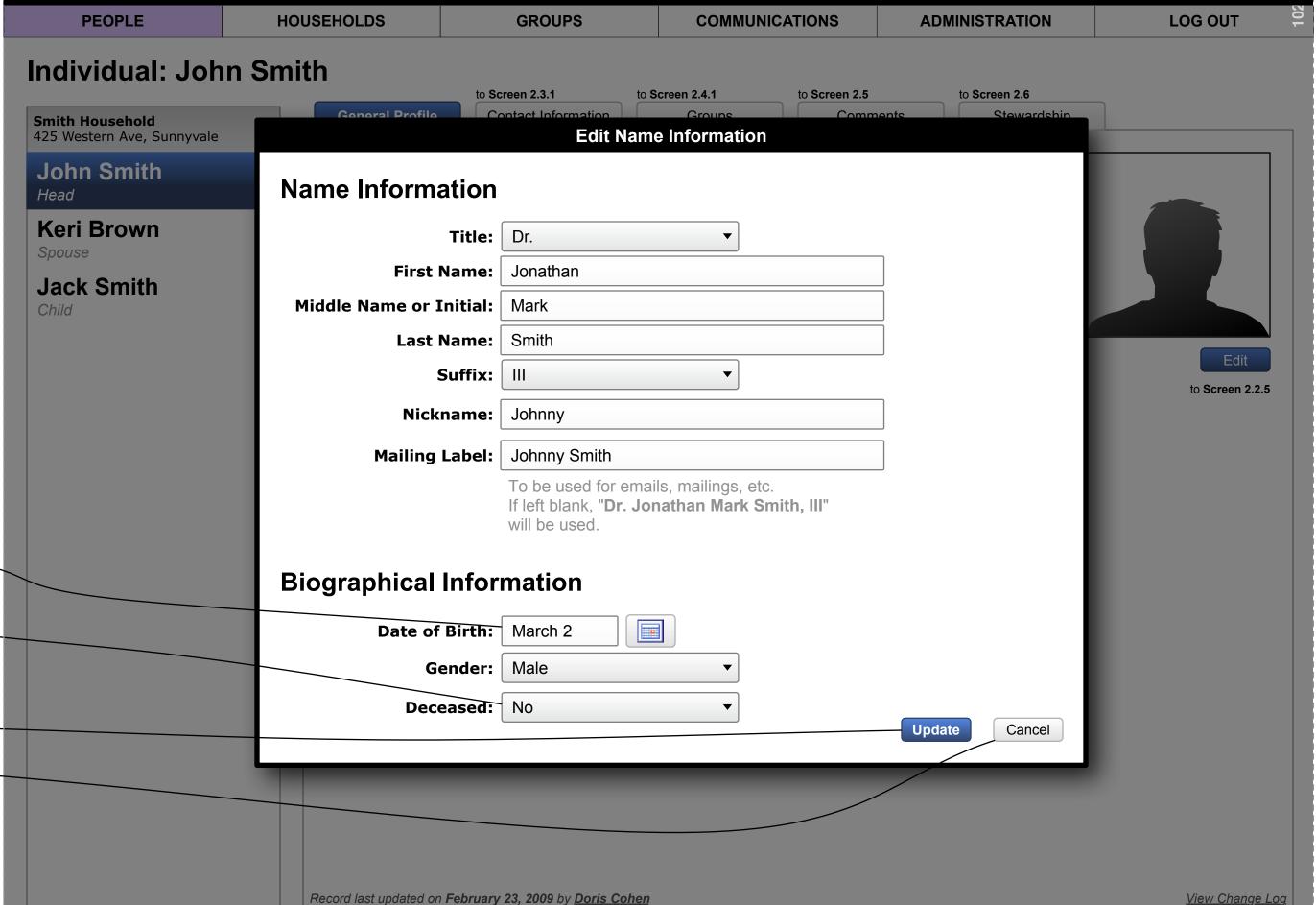
This screen allows a user to edit an individual's General Information, including name, church status, DOB and gender.

Date of Birth allows the user to enter in either just a Month/Day combination OR a full Month/Day/Year combination.

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 Jan 21 2010 Page 8 of 53

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

Edit an Individual – Membership Information

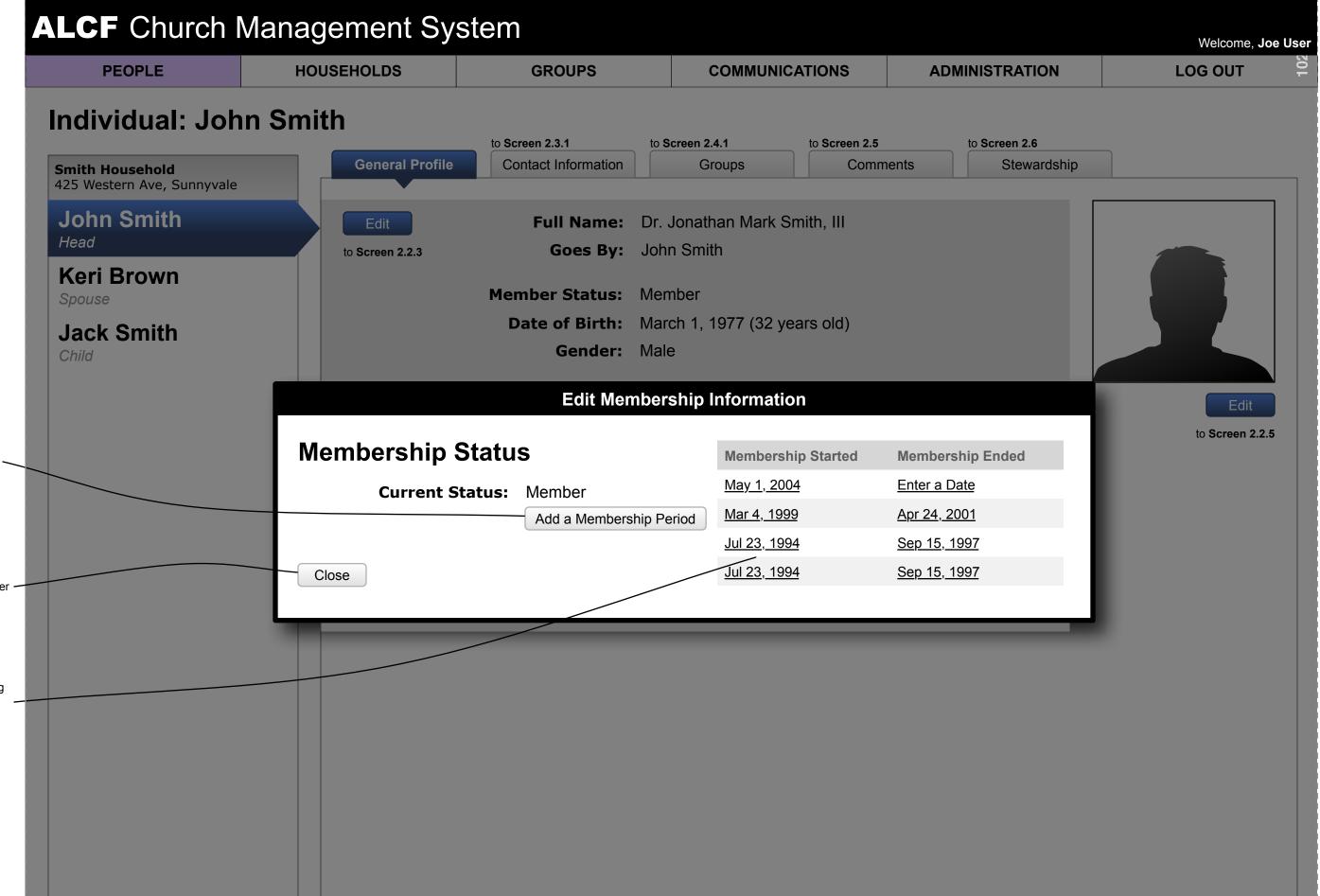
This screen allows a user to edit an individual's Membership Information.

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

View Change Log

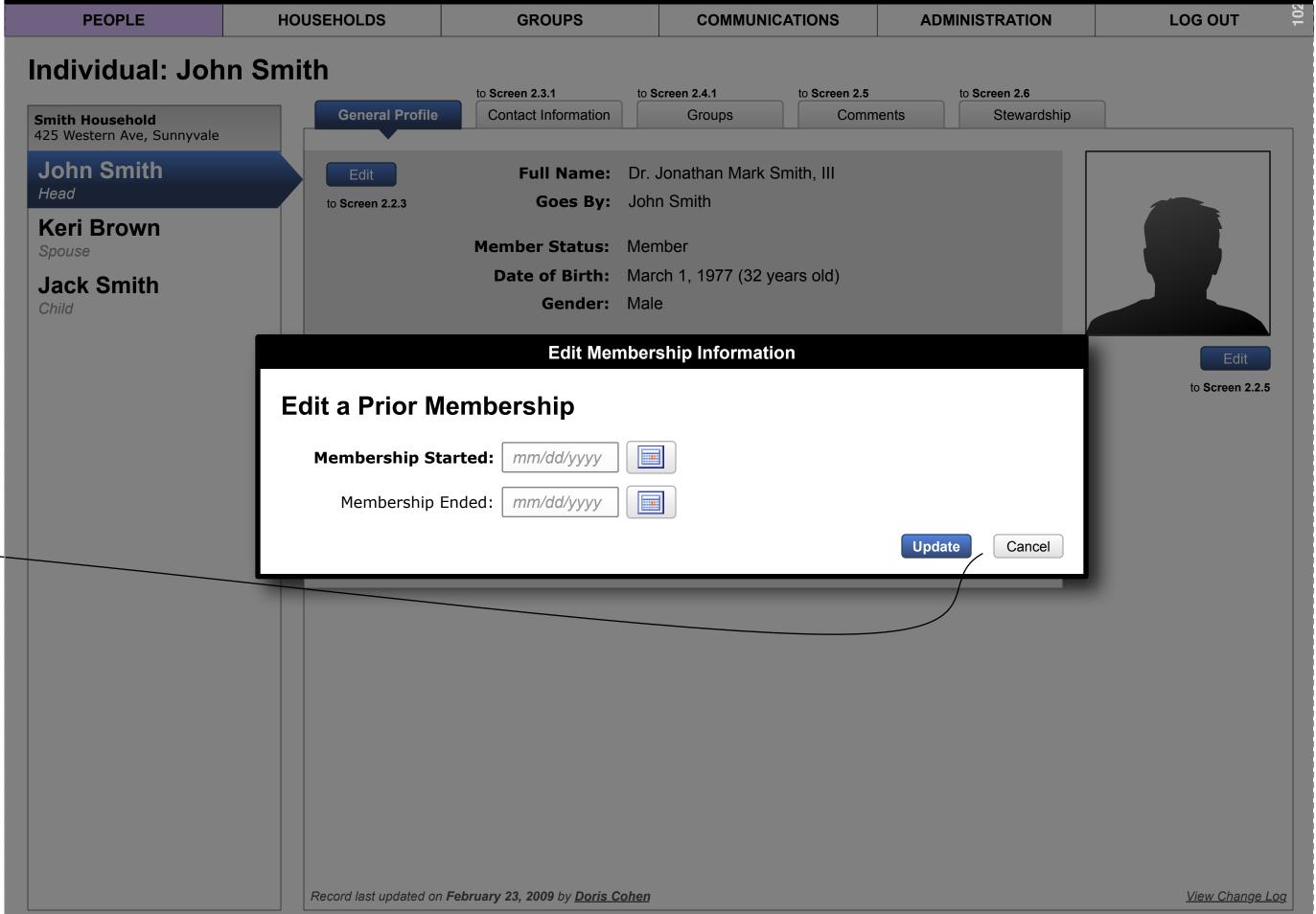
### Edit an Individual – Membership Dates

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 – Marriage Information

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

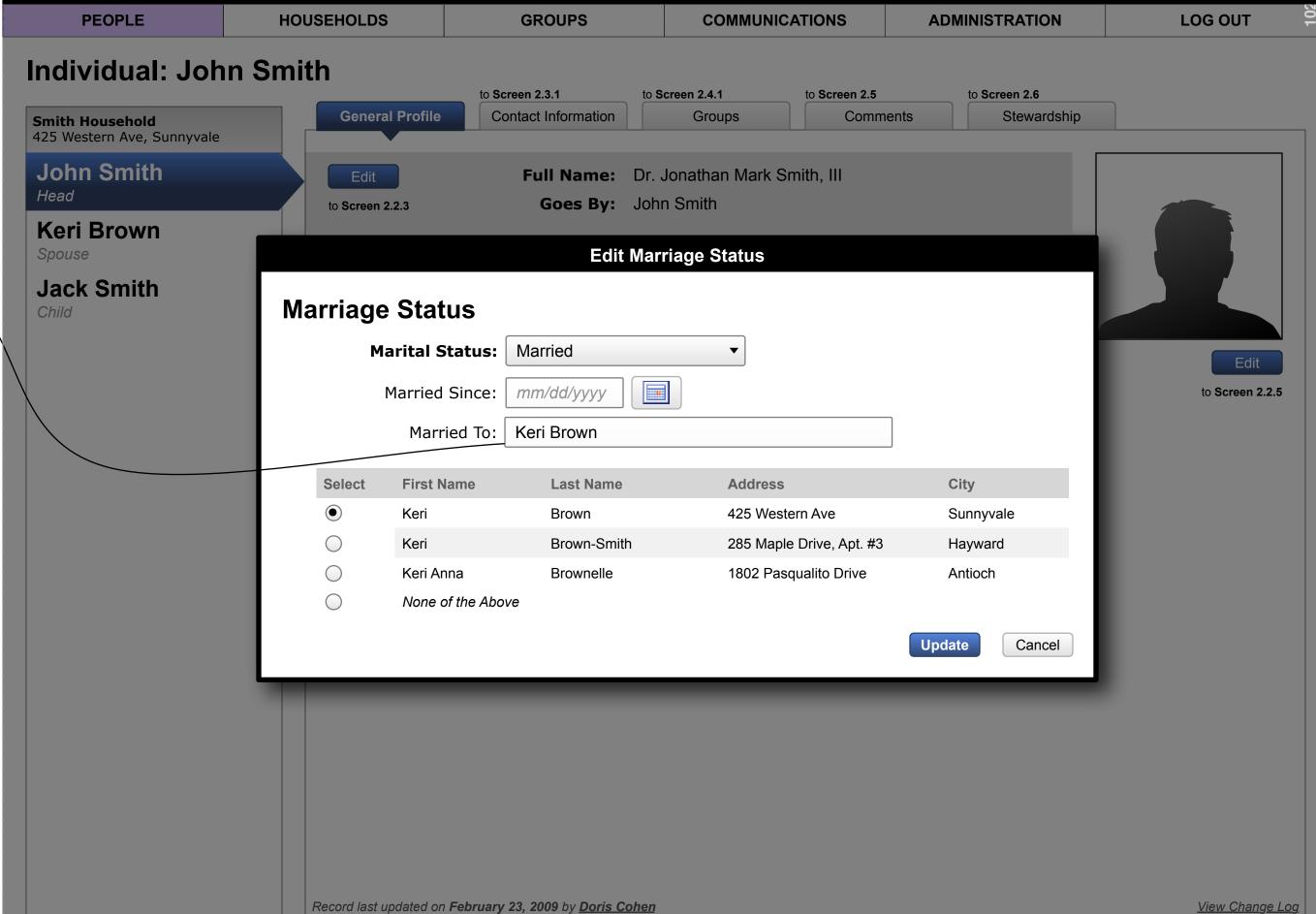
If a "Married To" name is entered, that name **must** be associated with an actual database record for that Individual.

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 household data?"

**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.

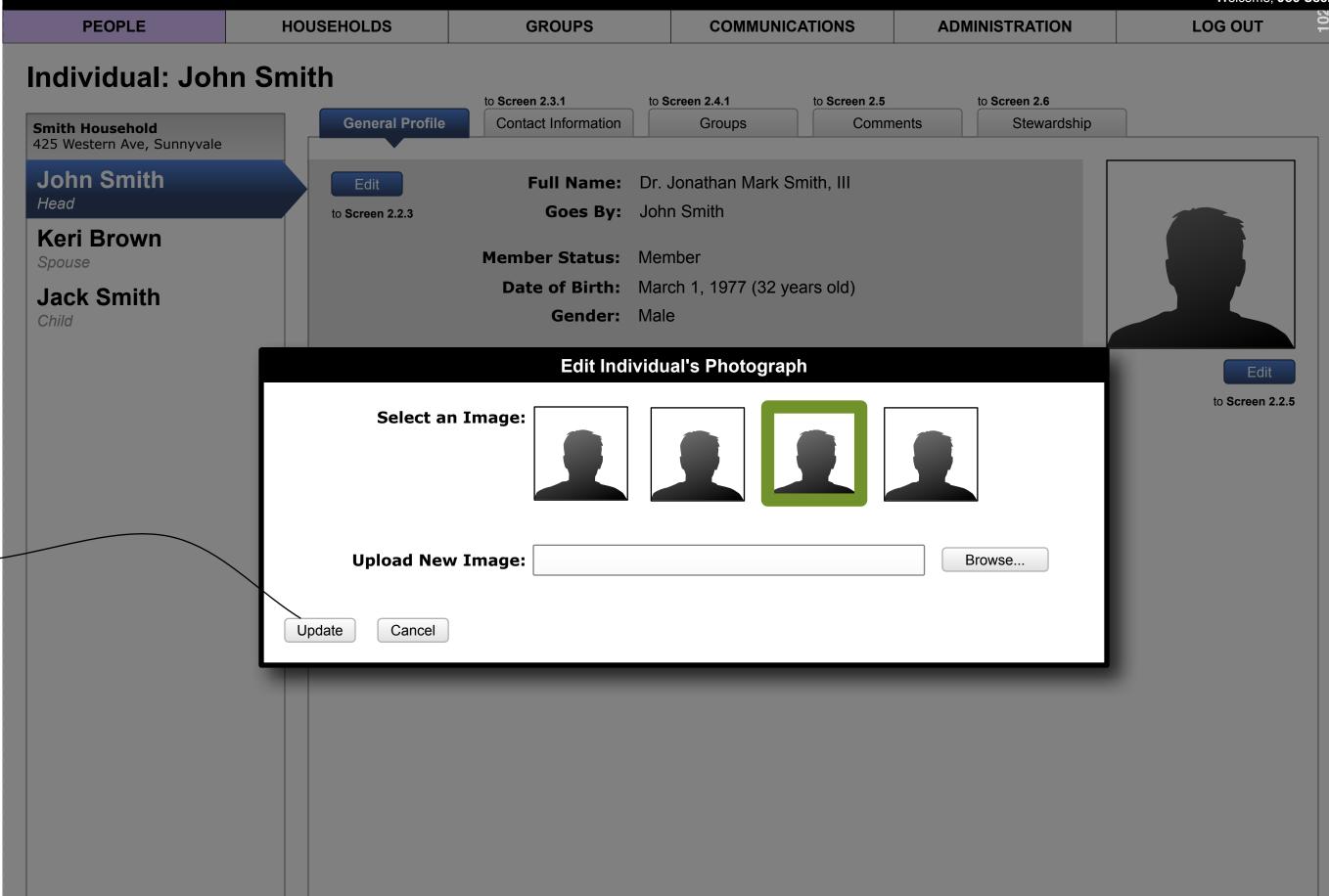


### Edit an Individual – Photograph

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.

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

View Change Log

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

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

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

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)

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
- Other

Only one phone can be set as "Primary".

Clicking on email address or the Add New buttor 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

**ChMS Main IA.graffle** Thu Jan 21 2010 Page 13 of 53



# **ALCF** Church Management System

to Screen 2.2.1

General Profile

**PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS LOG OUT ADMINISTRATION** 

to Screen 2.4.1

Groups

### **Individual: John Smith**

**Smith Household** 425 Western Ave, Sunnyvale

### John Smith Head

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**

[set as primary]

to Screen 2.6

Stewardship

**Primary? Email Address** Primary john smith@gmail.com [set as primary] jsmith1231@yahoo.com

john.f.smith@company.org

# Other Contact Information for John Smith

Add New

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

768 px 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

Add New

to Screen 2.3.5

to Screen 2.3.6

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 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

They CAN, however, have a Home phone defined.

# **ALCF** Church Management System

**PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION** 

to Screen 2.3.4

# **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 Num	bers for Joh	n 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>	415-552-9138
[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

<b>Email Addres</b>	Ses Add New
Primary?	Email Address
Primary	john_smith@gmail.com

jsmith1231@yahoo.com

john.f.smith@company.org

[set as primary]

[set as primary]

<b>Other Contact</b>	Information	for John	Smith
Other Contact	intormation	tor John	<b>Smith</b>

/ lad New		

to Screen 2.3.6

Welcome, Joe User

to Screen 2.3.5

	Contact Type	Value
	AIM Screen Name	<u>jsmith48421</u>
	Facebook ID	28410241
	Twitter Account Name	john smith 4 17
	Yahoo! Messenger Name	jsmith1231

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.

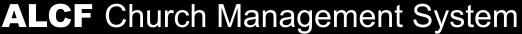
Clicking **Add Another** adds another blank "Alternate Home Phone" textbox to appear.

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 Thu Jan 21 2010 Page 15 of 53



768 px



Welcome, Joe User **PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION Individual: John Smith** to Screen 2.2.1 to Screen 2.4.1 to Screen 2.6 to Screen 2.9 to Screen 2.5 General Profile **Contact Info** Groups Comments Stewardship Attributes **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.3.2 John Smith Home Address and Phone for the Smith Household Add New Head Current **Address** City/State **Zip Code Home Phone** Keri Brown 94086 **Current Home** 425 Western Ave Sunnyvale, CA 408-555-1212 Spouse <u>5-1212</u> Jack Smith Edit Household - Home Address and Phone <u>-1725</u> Child **Home Address** to Screen 2.3.3 Add New **Current/Previous: Current Home Address** 425 Western Ave. Address 1: Address 2: **City, State, Postal Code:** - State - ▼ Postal Code **Primary?** to Screen 2.3.5 Add New 650-555-1212 Primary Home Phone: Address 650-824-1241 Alternate Home Phone: mith@gmail.com Alternate Home Phone: 650-555-1234 1231@yahoo.com mith@company.org **Add Another Update** Delete Cancel to Screen 2.3.6 **Other Contact Information for John Smith** Add New **Contact Type** AIM Screen Name jsmith48421 Facebook ID 28410241 **Twitter Account Name** john smith 4 17 Yahoo! Messenger Name jsmith1231

View Change Log

Record last updated on February 23, 2009 by Doris Cohen

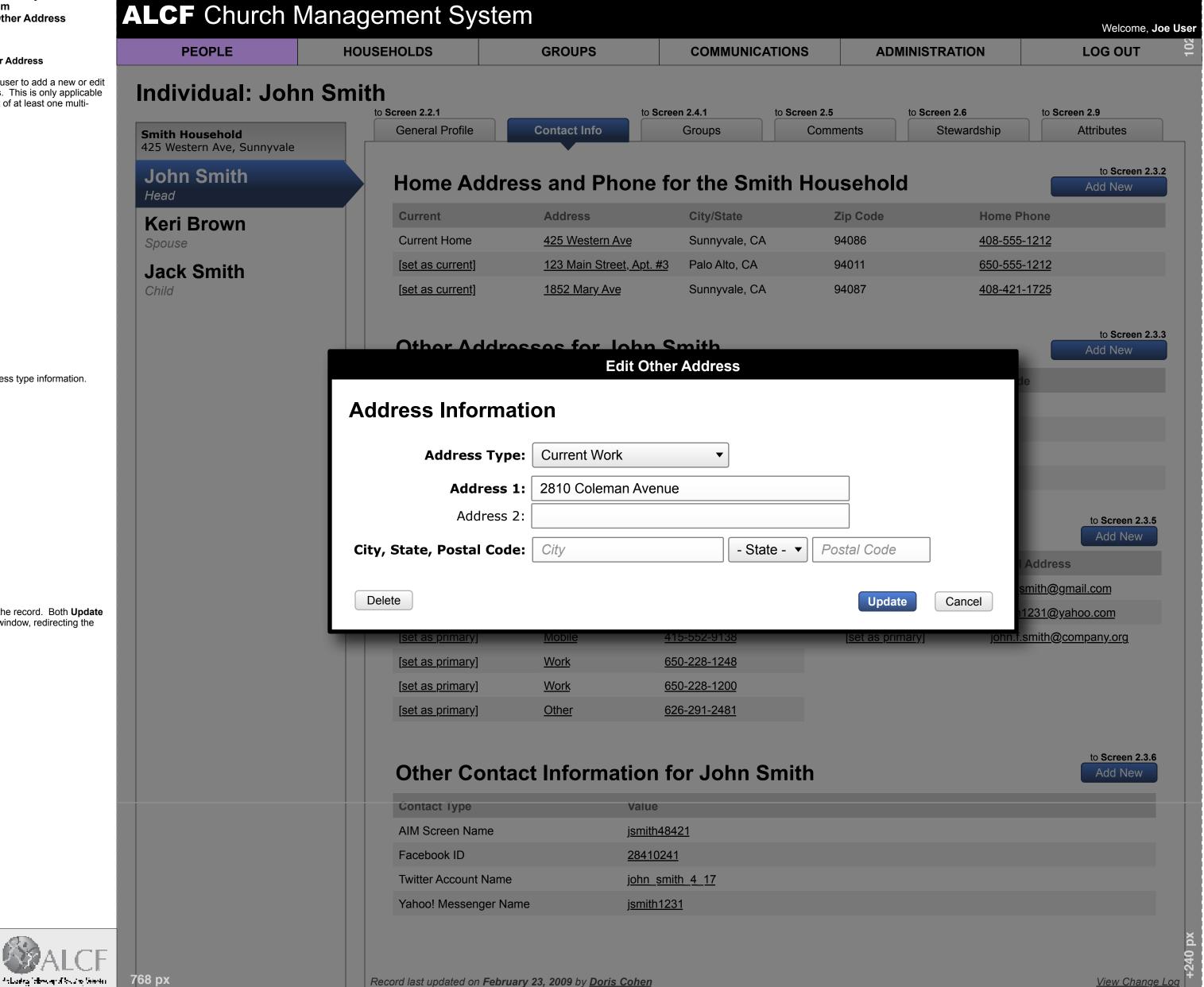
ALCF Church Management System IA Membership Subsystem 2.3.3 Edit Individual, Other Address

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.





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

Edit an Individual – Phone Number

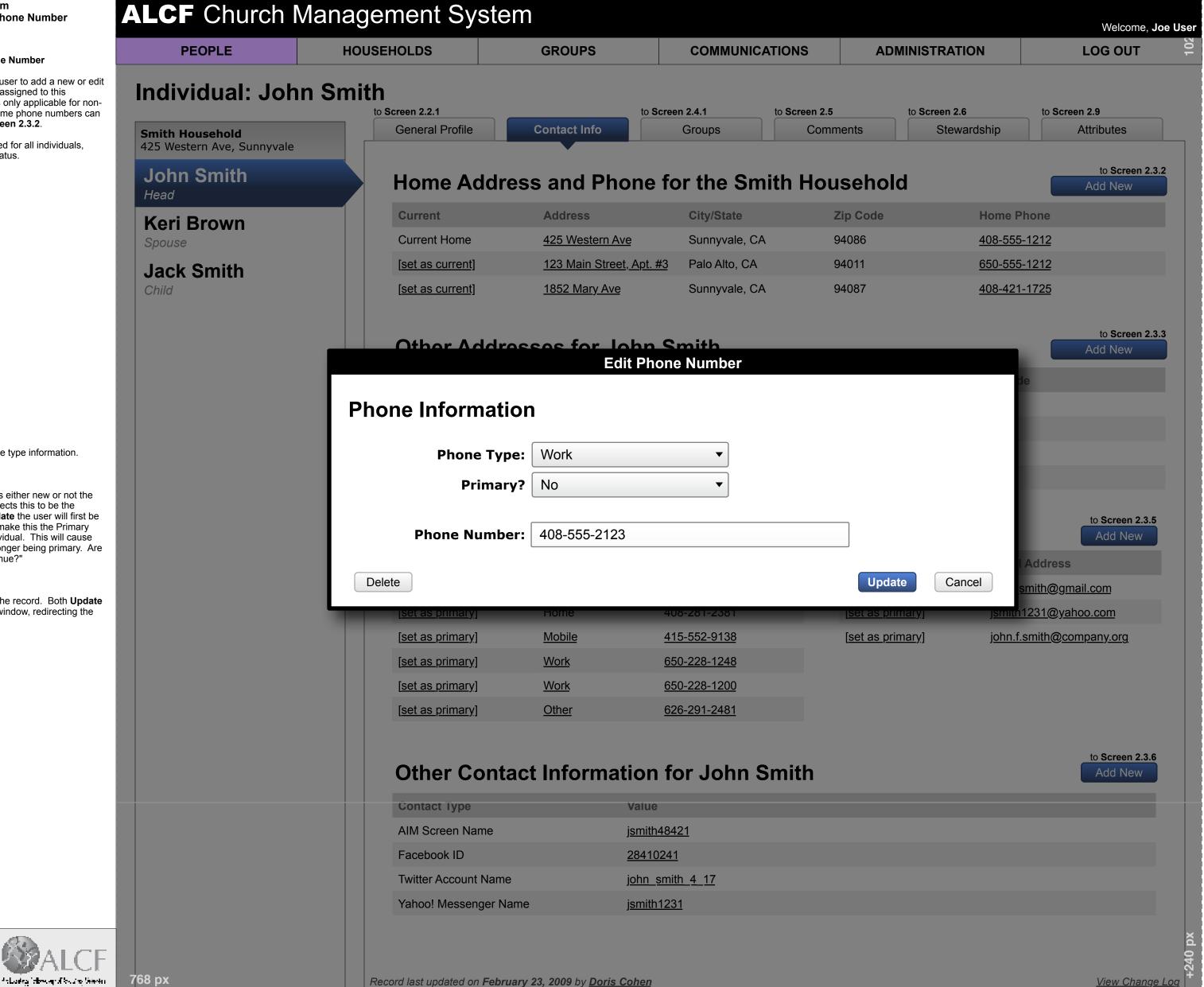
This dialog box allows the user to add a new or edit an existing phone number assigned to this individual. Note that this is only applicable for nonhome phone numbers. Home phone numbers can only be edited through Screen 2.3.2.

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 Jan 21 2010 Page 17 of 53



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

**ALCF** Church Management System

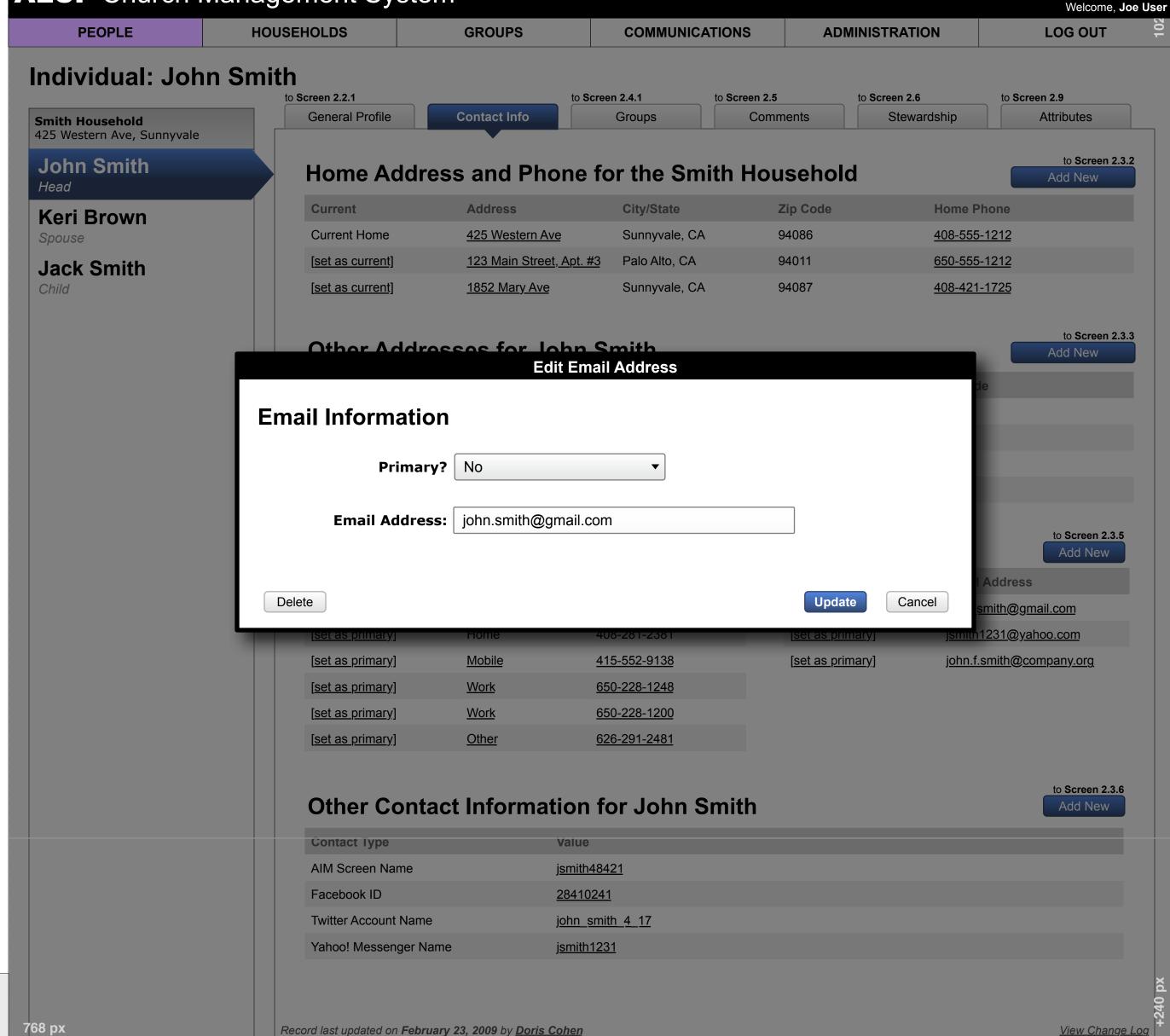
Edit an Individual - Email

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**.



ChMS Main IA.graffle Thu Jan 21 2010 Page 18 of 53



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

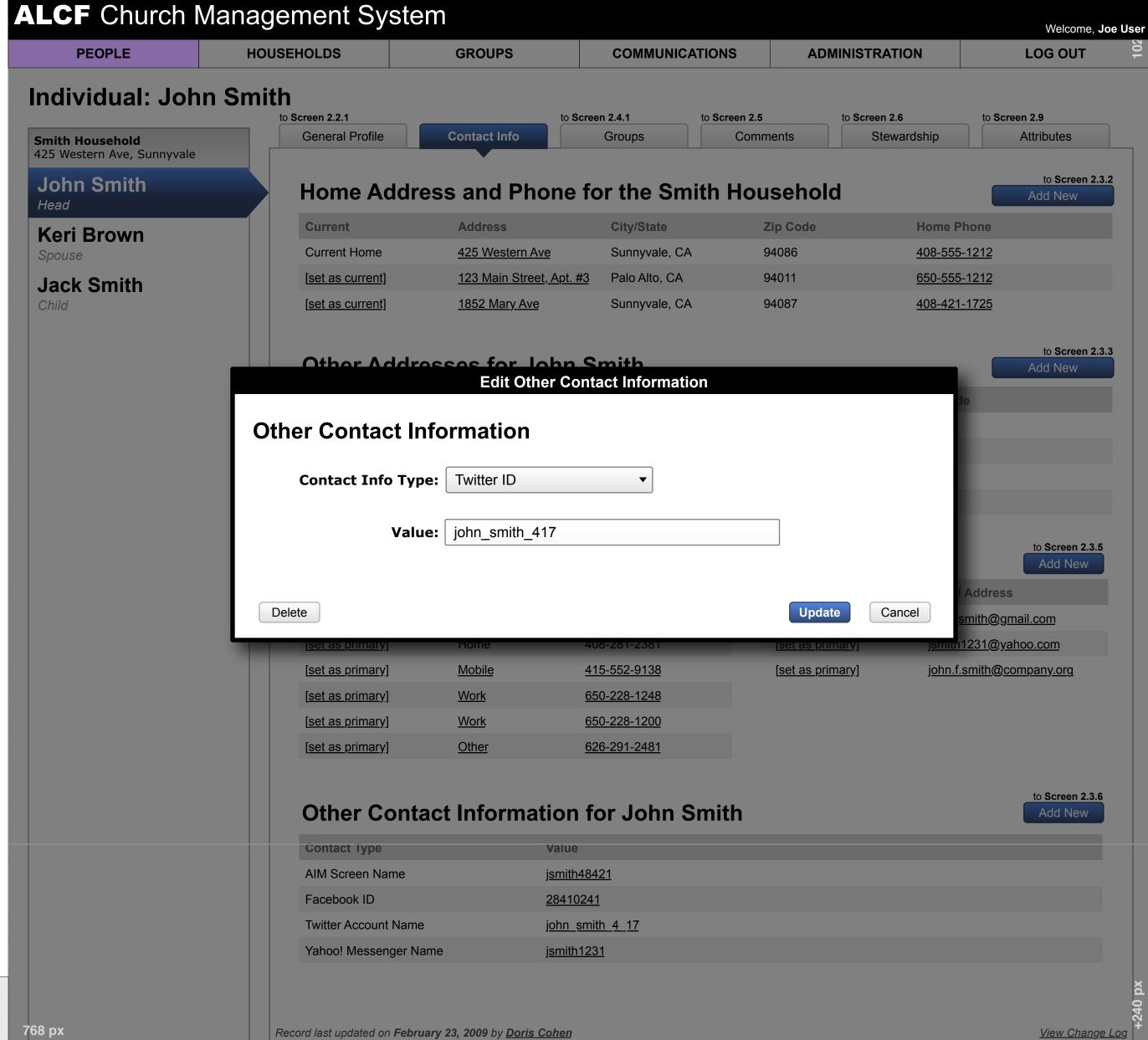
Edit an Individual - Other Contact

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



ChMS Main IA.graffle Thu Jan 21 2010 Page 19 of 53



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

**PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION** 

Groups

### **Individual: John Smith**



# Head

Keri Brown Spouse

### **Jack Smith**

Child

# **Ministry Participation**

to Screen 2.3.1

Contact Info

to Screen 2.2.1

General Profile

Ministry	Role	Dates of Involvement
Safari Kids	Volunteer	April 2009 - Present 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

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 Jan 21 2010 Page 20 of 53



768 px

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 2.4.2

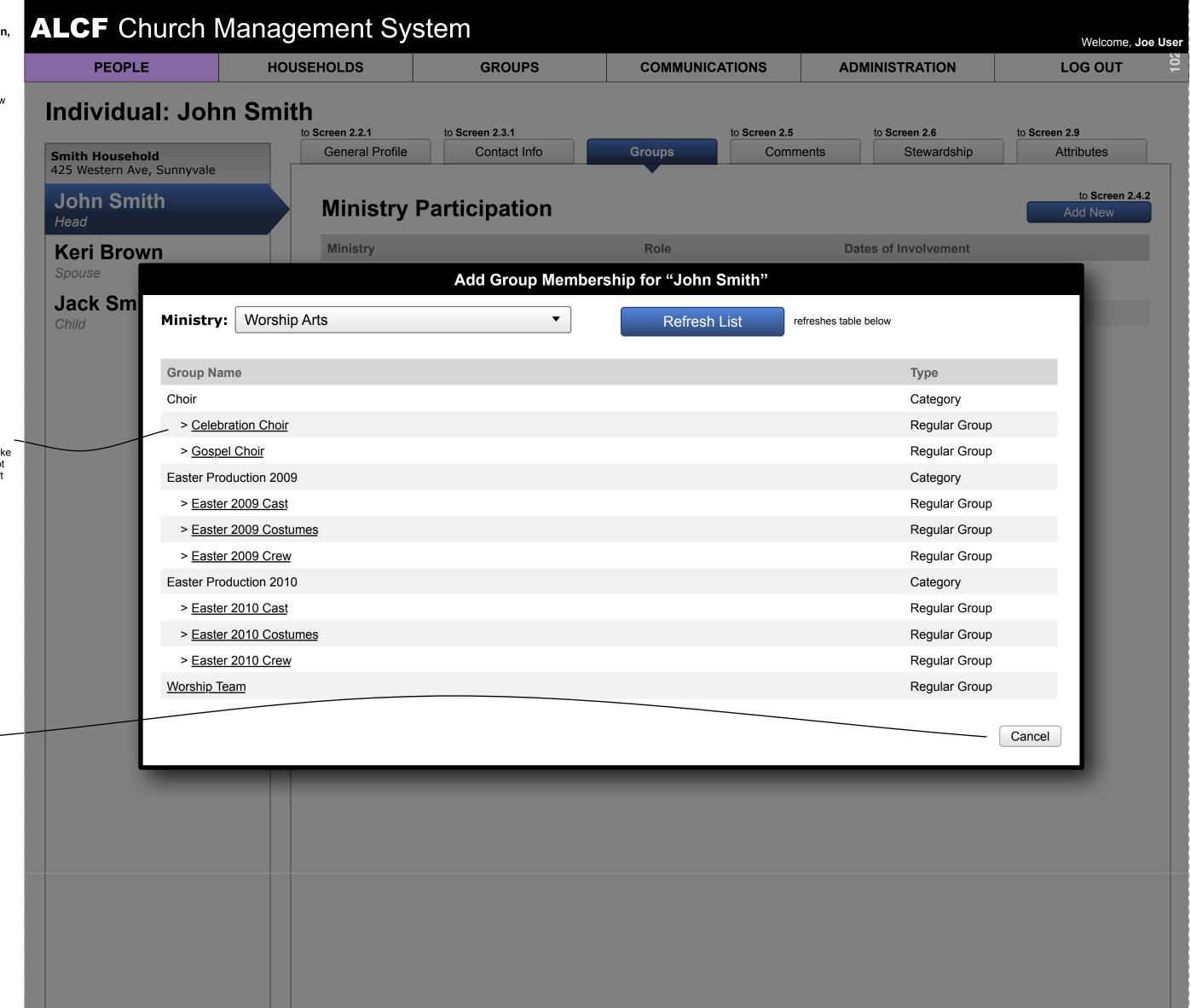
ALCF Church Management System IA Membership Subsystem 2.4.2 Edit Individual, Ministry Participation, Add

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**.



View Change Log

Record last updated on February 23, 2009 by Doris Cohen



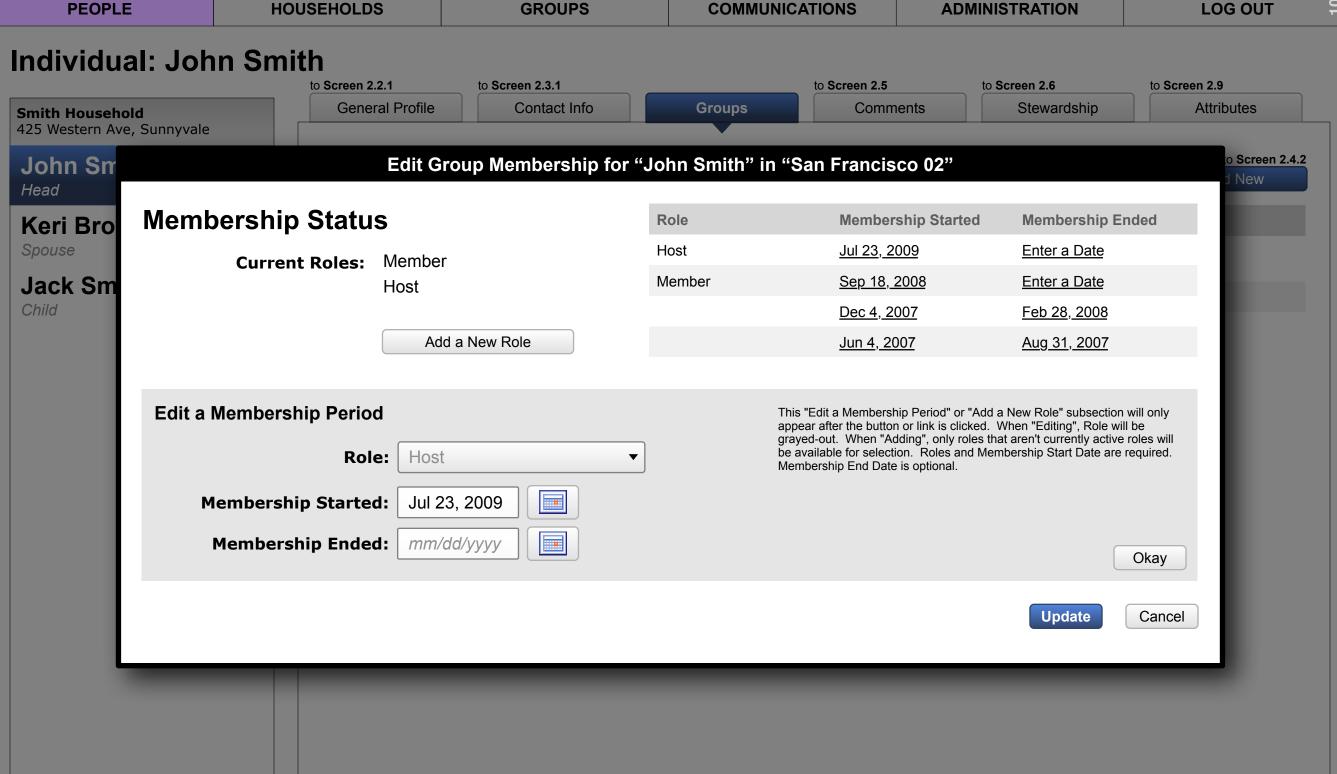
ALCF Church Management System IA Membership Subsystem 2.4.3 Edit Individual, Ministry Participation

Edit Individual — Ministry Participation

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

# **ALCF** Church Management System

Welcome, Joe User



Thu Jan 21 2010 Page 22 of 53

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

768 px

to Screen 2.5.1

**LOG OUT** 

This screen shows all the staff, general and pastor

View an Individual – Comments

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**

**PEOPLE** 

**Smith Household** 

**John Smith** 

Keri Brown

**Jack Smith** 

Head

Spouse

Child

425 Western Ave, Sunnyvale

**ALCF** Church Management System

**HOUSEHOLDS** 

to Screen 2.2.1 General Profile

to Screen 2.3.1 Contact Info

**GROUPS** 

to Screen 2.4.1 Groups

Comments

to Screen 2.6 Stewardship

**ADMINISTRATION** 

to Screen 2.9

Attributes

Add New

### **Comments and Notes**

Filter by Posted By:

- View All -

**Filter by Comment Type:** 

- View All -

**COMMUNICATIONS** 

**Filter by Hidden State:** 

quis metus. Mauris lectus. Quisque erat nunc.

✓ Include HIdden Comments

Edit / Hide	Posted By	<u>DATE</u> 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.
[Unhide]	Ilana Doyle	2007-03-04	Confidential	Ut et risus quis justo iaculis vestibulum. Ut sapien eros, gravida nec, placerat et, luctus eu, libero. Mauris.
[ <u>Hide]</u>	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.
[Unhide]	Tavy Smith	2008-08-03	General	In porta rhoncus libero. Mauris tristique lacinia tellus. Maecenas egestas, mauris sit amet suscipit pretium, massa lacus facilisis eros, eu sodales dui eros eu nisl. Curabitur

**ChMS Main IA.graffle** Thu Jan 21 2010 Page 24 of 53

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

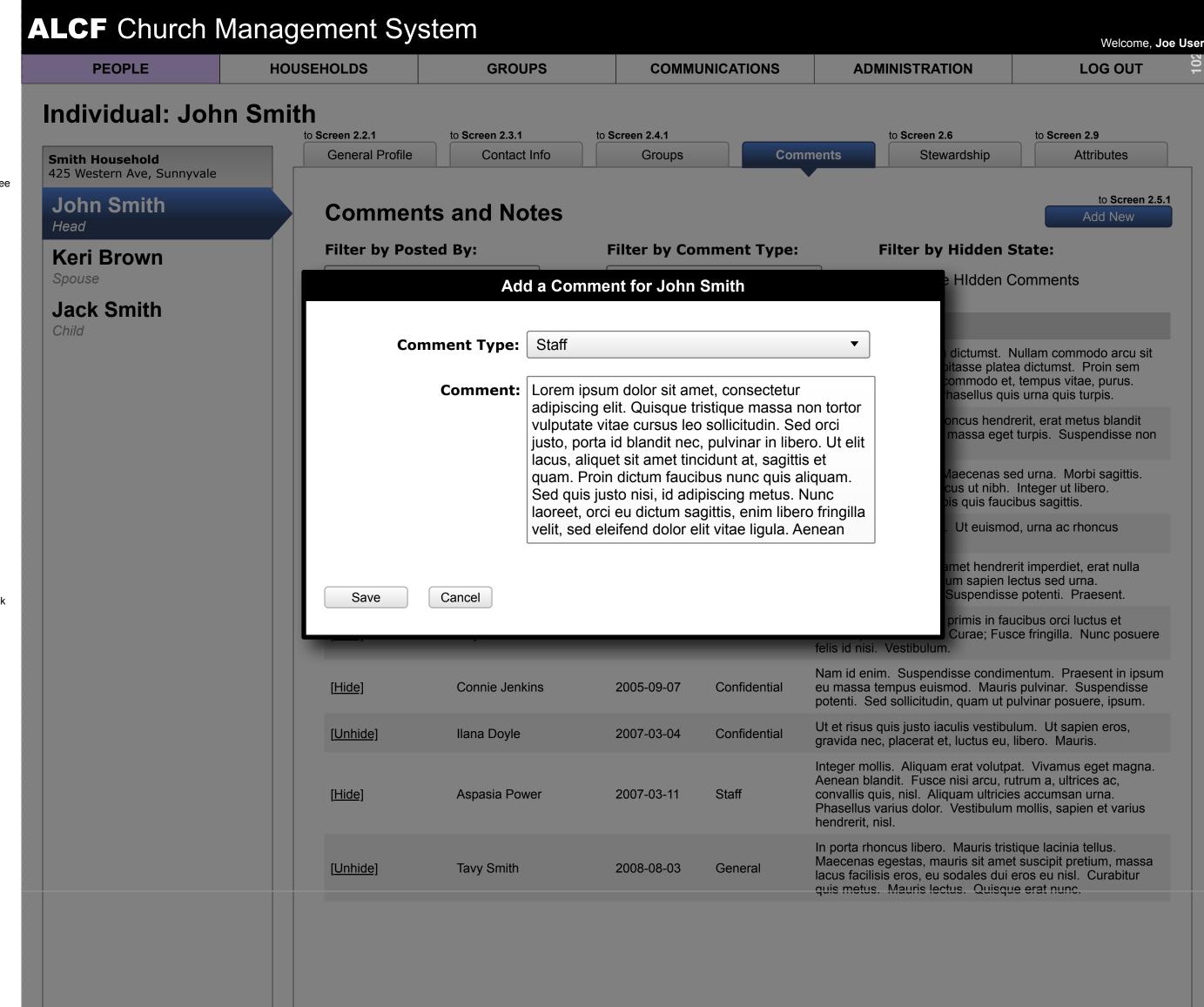
### Edit an Individual - Comments

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

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





Thu Jan 21 2010 Page 25 of 53



View an Individual - Stewardship

to Screen 2.9

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

Thu Jan 21 2010 Page 26 of 53



# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

to Screen 2.3.1

# **Individual: John Smith**



to Screen 2.2.1

# Keri Brown

**Smith Household** 

Spouse

Head

### **Jack Smith**

Child

General Profile	Contact Info	Groups	Comments	Stewardship	Attributes	
Stewardsh	nip		eport of the list of transaction /ven the specified filtering criteria.		to Screen 2.6.1 Add New	

to Screen 2.5

Date Range:	Filter by Fund:	Filter by Transaction Type:	View Entire Household:
- View All -	- View All - ▼	- View All - ▼	✓ View contributions by all household members

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
<u>2004-10-07</u>	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

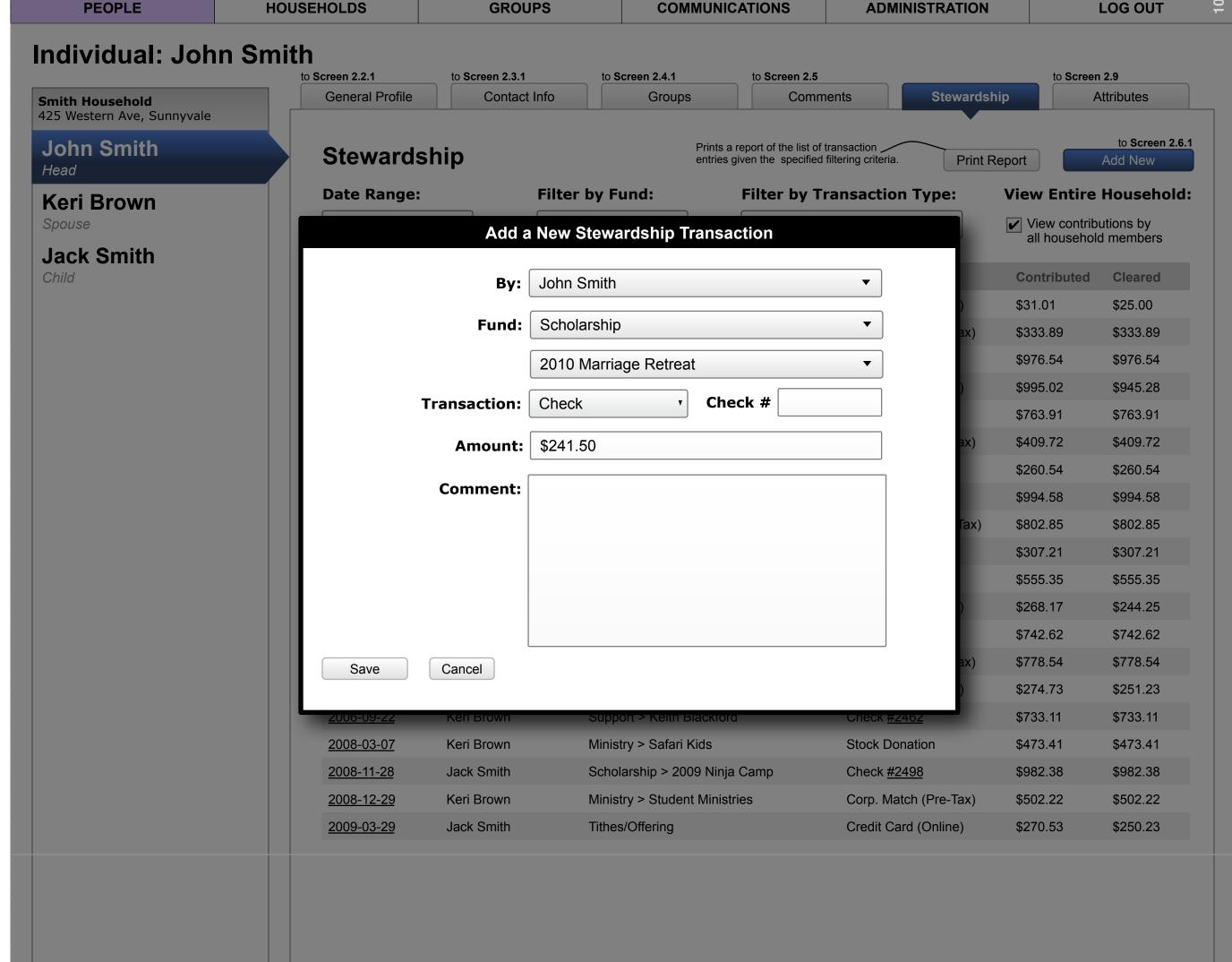
### Edit Individual – Stewardship

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





### 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"

**Barry** 

**Chang** 

Cunningham

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 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
 City

 Page
 Alexander
 Non-Member
 41098 Mill Valley Way
 Anderson

1040 La Canada Flintridge Dr.

30200 Elk Grove St.

54957 Hughson Way

Hercules

Agoura Hills

Laguna Niguel

SusyBarryNon-Member/Tithe76207 Walnut Ave.IrwindaleWaldenBarryNon-Member31558 Kerman Blvd.East Palo Alto

BenedictBennettMember30811 Palm Springs RoadBellDandyBrooksMember88436 Mountain View RoadCommerce

BurleighBuckleyNon-Member54019 Industry Ave.CapitolaBassBurkeNon-Member/Tithe59216 Reedley Dr.Antioch

Non-Member

Member

Member

Worthington Coleman Non-Member/Tithe 25835 Emeryville Blvd. Hillsborough

<u>Lula</u> <u>Collins</u> Non-Member 80939 Canyon Lake Dr. Colton

Minna Cook Member 2279 Sonora Road Lakeport

<u>Tilda</u> <u>Cullen</u> Non-Member 83531 Chico Blvd. Biggs

Abbie Davis Non-Member/Tithe 56850 El Cajon Road West Sacramento

Martie Davis Non-Member/Tithe 33924 Fullerton St. La Mesa

Toinette Davis Member 41077 Dorris Dr. Truckee

Bowie Doherty Non-Member 37431 Santa Monica St. Salinas

Griz Donnelly Non-Member/Tithe 65033 Cudahy Blvd. Blythe





<u>Silvanus</u>

<u>Amorita</u>

Russell

768 px

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.

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.

# **ALCF** Church Management System

**HOUSEHOLDS PEOPLE GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT** 

Merge Individuals: "John Smith"

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

### Households

✓ 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

122 Main St, Palo Alto

✔ Previous Work 122 Main Avenue, Palo Alto

### Phone

Mobile - (415) 555-1212

Mobile - (415) 551-5121

Previous Work

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

Cancel

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

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

Welcome, Joe User

ALCF

ChMS Main IA.graffle Thu Jan 21 2010 Page 31 of 53 240 px

### 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

**PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT** 

to Screen 2.4.1

Groups

to Screen 2.5

Comments

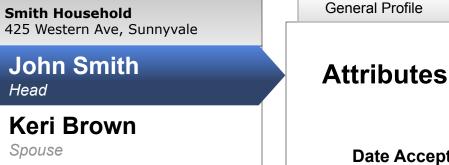
to Screen 2.6

Stewardship

### **Individual: John Smith**

**Jack Smith** 

Child



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 Jan 21 2010 Page 32 of 53



768 px

View Change Log

Welcome, Joe User

**Attributes** 

Add New

to Screen 2.9.2

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

**PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION** LOG OUT **Individual: John Smith** to Screen 2.6 to Screen 2.2.1 to Screen 2.3.1 to Screen 2.4.1 to Screen 2.5 General Profile **Attributes** Contact Info Groups Comments Stewardship **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.9.2 **John Smith Attributes** Head Keri Brown **Edit "Ministry Consultation Date"** Spouse **Jack Smith Ministry Consultation** Child 2/5/2005 Date: Save Cancel Min Ministry Consultation Date: February 5, 2005 Edit

View Change Log



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

View an Individual – Add an Attribute

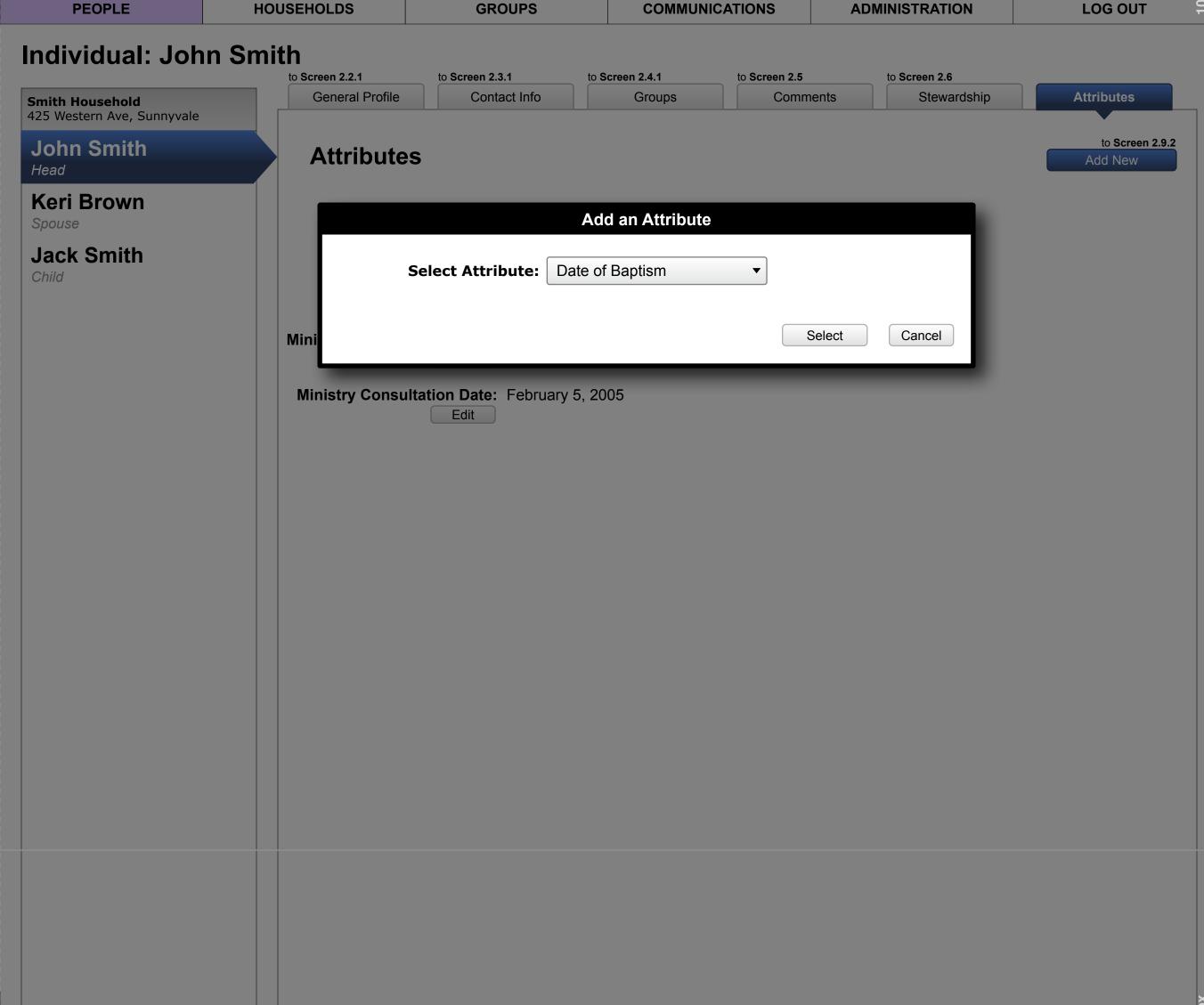
The list of available attributes is managed by a ChMS Administrator – see **Screen 2.9** for more notes on other attributes.

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

ChMS Main IA.graffle Thu Jan 21 2010 Page 34 of 53



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 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

# **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 1-20 of	of 2141.			Previous   Next
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	Ī
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	1
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	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	

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 2.3.1**.

# **ALCF** Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

# Household: John Smith Household

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

to Screen 3.3

to Screen 3.4

Edit Roles

Welcome, Joe User

### **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	Jack Smith		

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

				7 dd 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]	<u>1852 Mary Ave</u>	Sunnyvale, CA	94087	<u>408-421-1725</u>

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



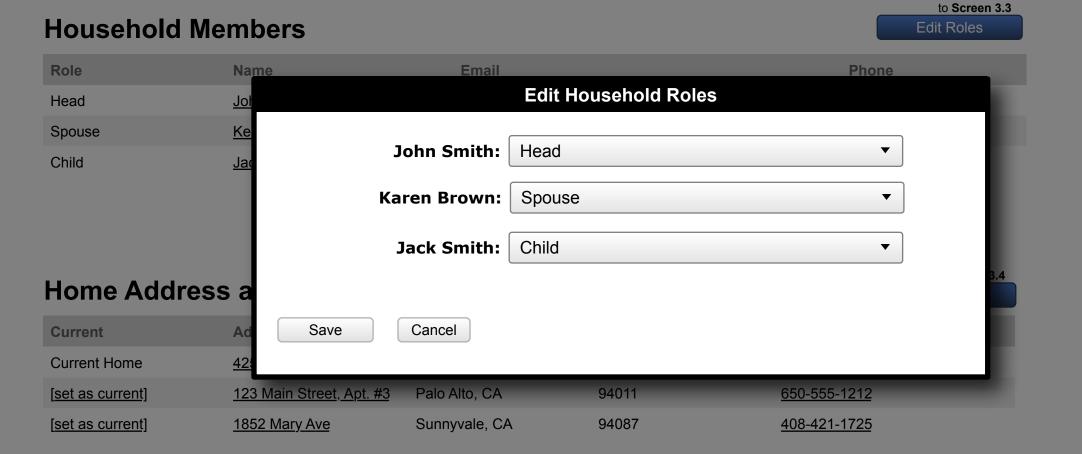
Edit Household - Roles

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



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

# **ALCF** Church Management System

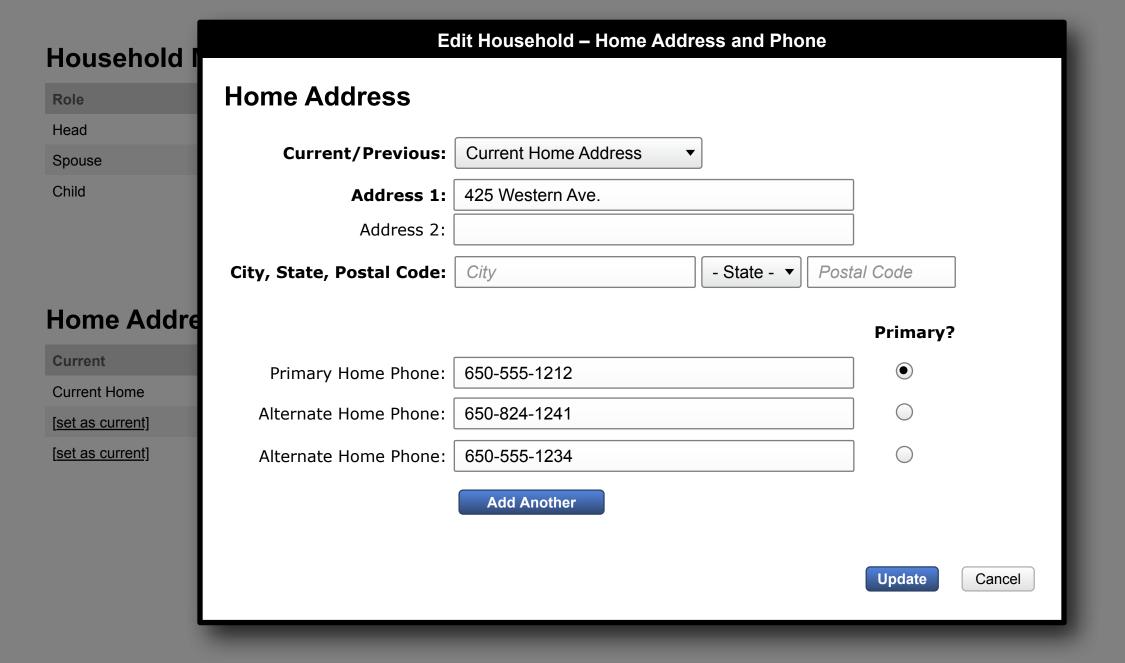
**PEOPLE** 

**ADMINISTRATION** LOG OUT

Welcome, Joe User

Household: John Smith Household

**HOUSEHOLDS** 



**GROUPS** 

to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household

**COMMUNICATIONS** 

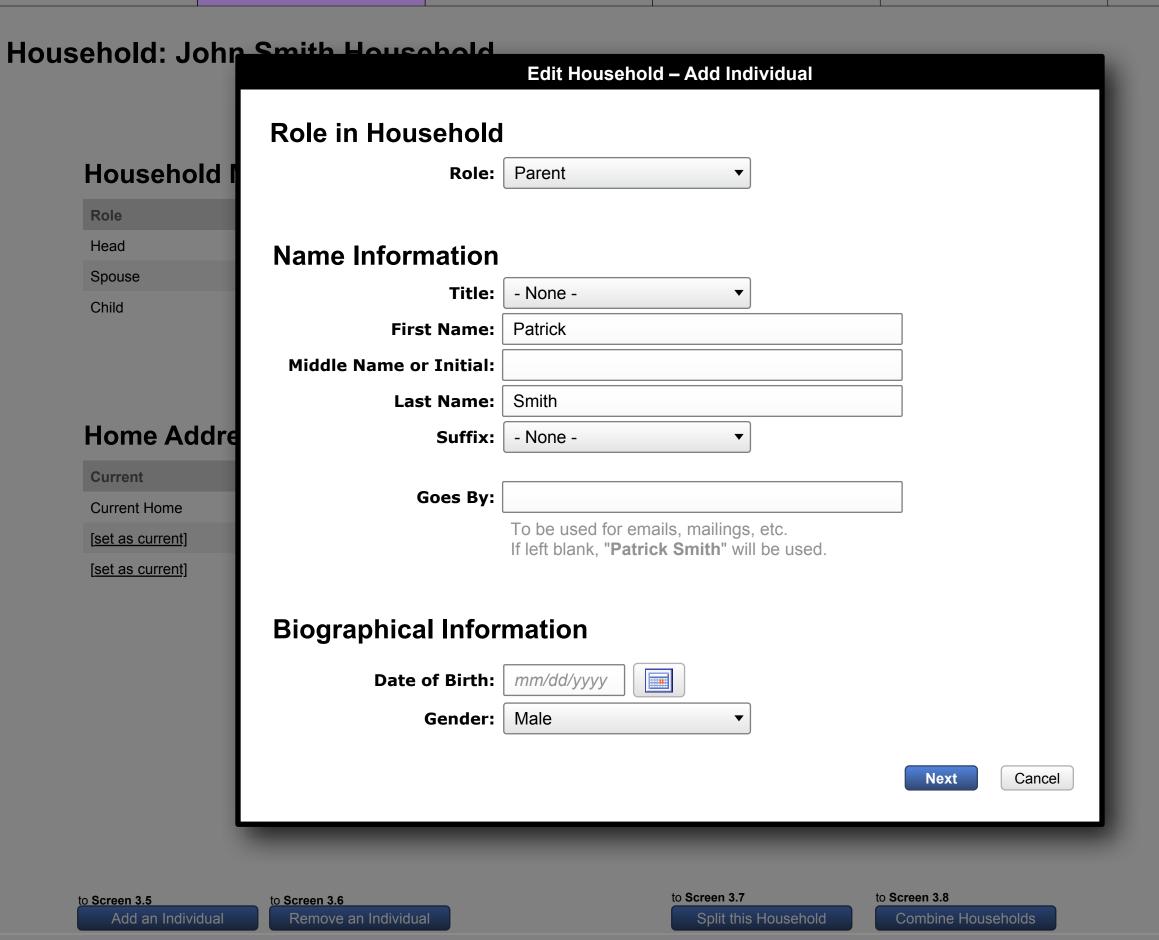
to Screen 3.8

Page 38 of 53

\* 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** Thu Jan 21 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

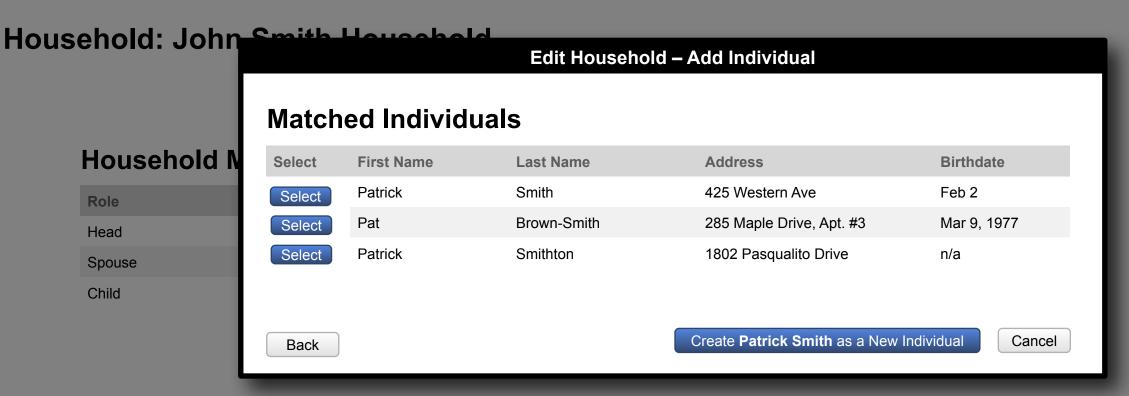
"Select" will have the system check to see if the individual is already part of a multi-person household:

- \* 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

to Screen 3.4 Add New

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	408-421-1725

to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household to Screen 3.8

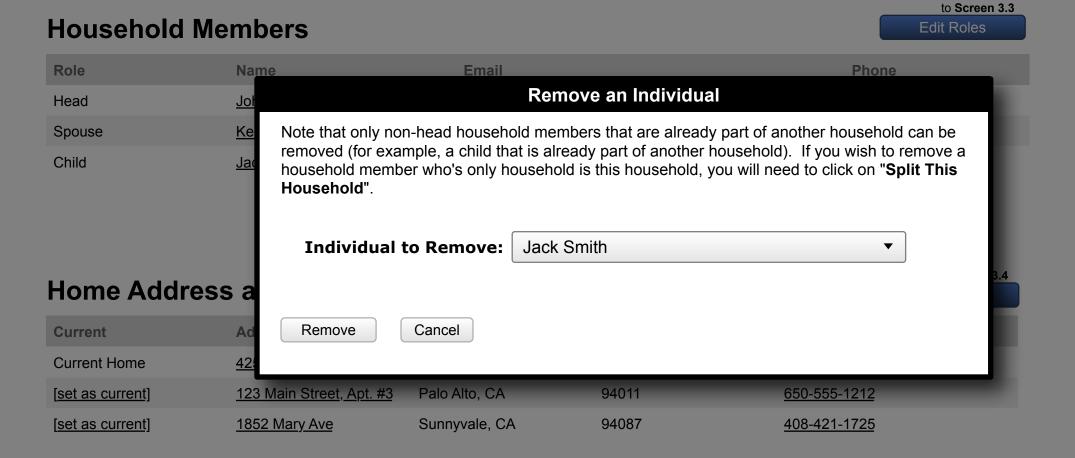
See note in the dialog box about which individuals

# **ALCF** Church Management System

Welcome, Joe User

**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



This will cause the current household to be split into

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

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.

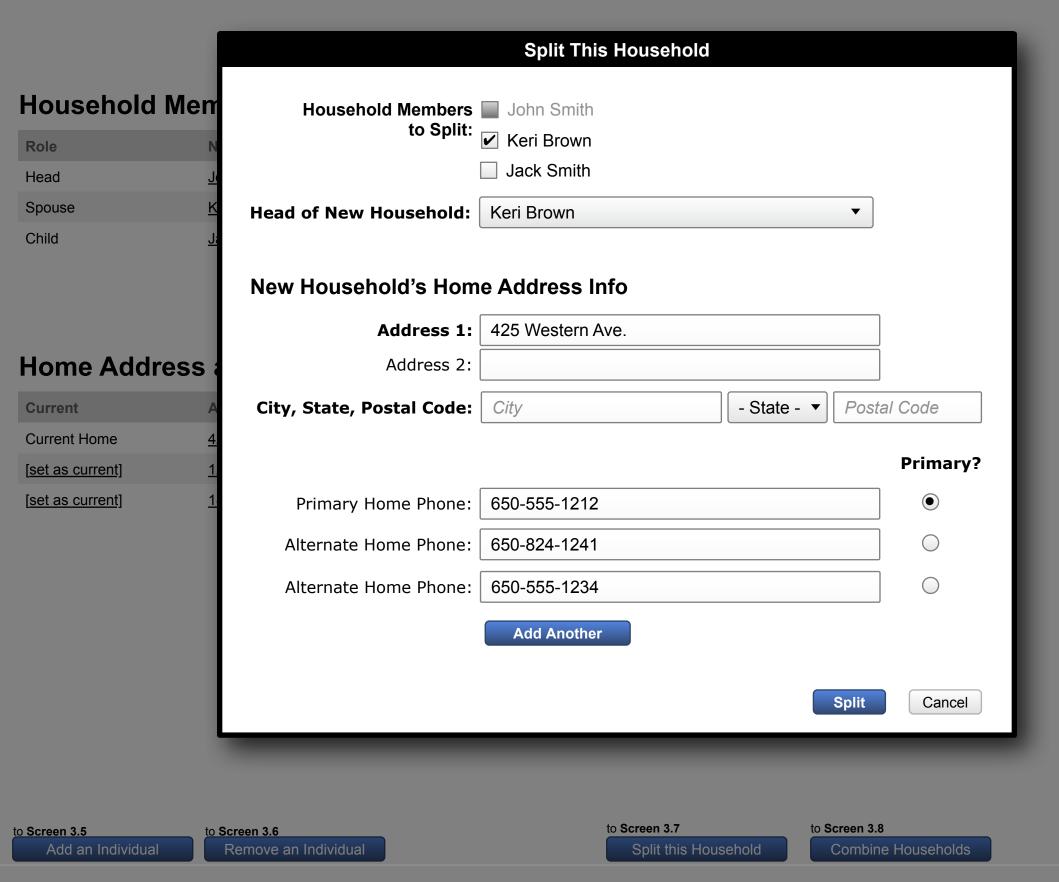
Current home address information for this household will remain unchanged.

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**



#### 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.

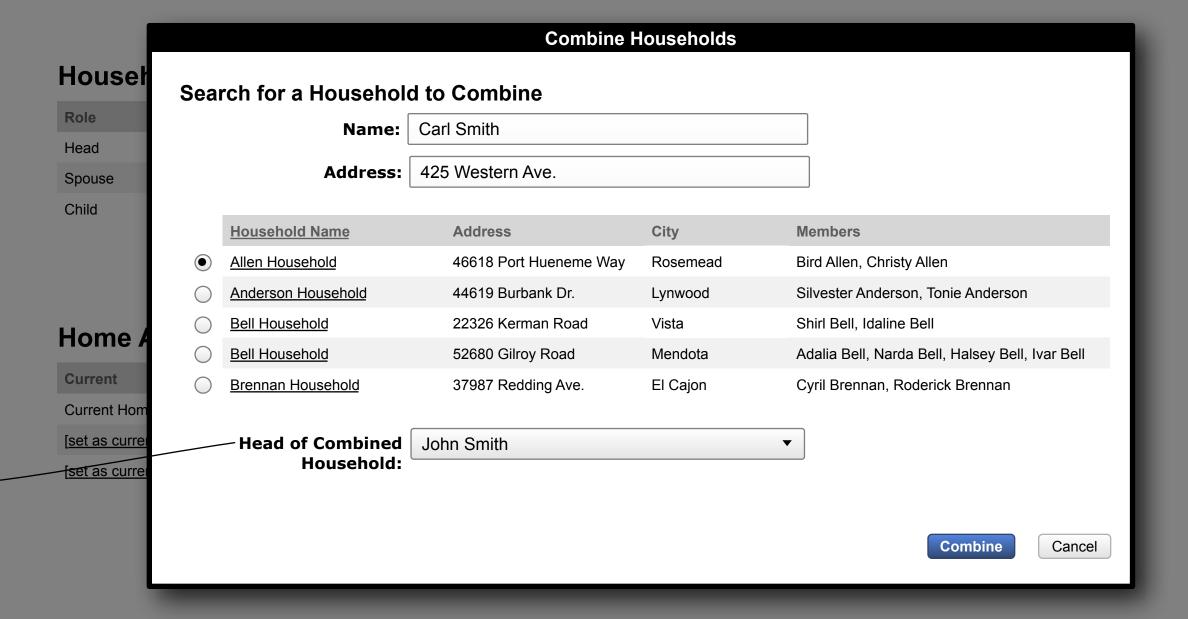
After hitting "Merge", the dialog box will close, redirecting the user to Screen 3.2 for the combined household. If there is any old "Recently Split from..." messaging on either household, that will no longer appear.

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 Individual to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Combine Households

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 – <u>easter-2009-costumes@groups.alcf.net</u>
> 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 – <u>easter-2010-costumes@groups.alcf.net</u>
> 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

clicking on any item will take user to Screen 4.2.1 ~ 4.2.5 (depending on 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

Thu Jan 21 2010 Page 44 of 53

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
> 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
> South Bay	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 – <u>worship-team@groups.alcf.net</u>

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

Page 45 of 53

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

**Groups in this Category** 

Group Name	Туре	Email
<u>Peninsula</u>	Category	none
> San Francisco 01	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>	<u>Adrian</u>	<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	Power	bpower1881@northwestern.edu	Member
<u>Edit</u>	Bessie	<u>Hall</u>	bhall7757@rocketmail.com	Member
<u>Edit</u>	<u>Bret</u>	Shaw	bret.shaw5743@hotmail.com	Member
<u>Edit</u>	Burton	<u>Long</u>	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>	<u>Bell</u>	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>	<u>Lee</u>	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

#### 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

Welcome, Joe User

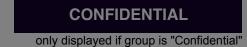
**PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT** 

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

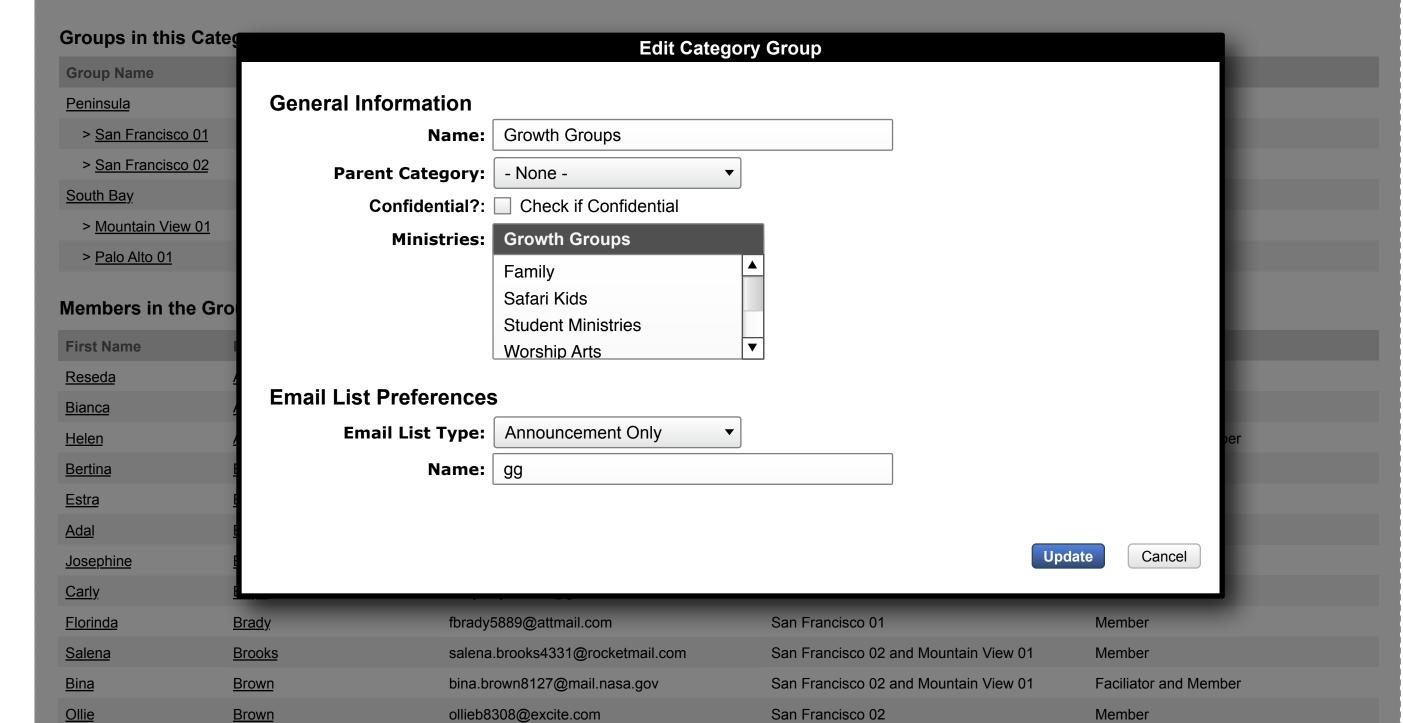
**Ministry:** Growth Groups

**Parent Category:** *none* 

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



to Screen 4.3.1 Edit



San Francisco 01

San Francisco 01

Mountain View 01

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

Member

Faciliator

Member and Host

Host

owenb213@lycos.com

rosalieb9352@rocketmail.com

alice.carter8397@attmail.com

neal.carter8613@attmail.com

vcasey8472@rocketmail.com

malva.chan5081@rice.edu

pchang7735@excite.com

bbutler7368@earthlink.net





<u>Owen</u>

Rosalie

**Barbara** 

<u>Alice</u>

<u>Neal</u>

<u>Virginia</u>

<u>Malva</u>

768 px

<u>Burns</u>

**Burns** 

**Butler** 

<u>Carter</u>

<u>Carter</u>

<u>Casey</u>

<u>Chan</u>

<u>Chang</u>

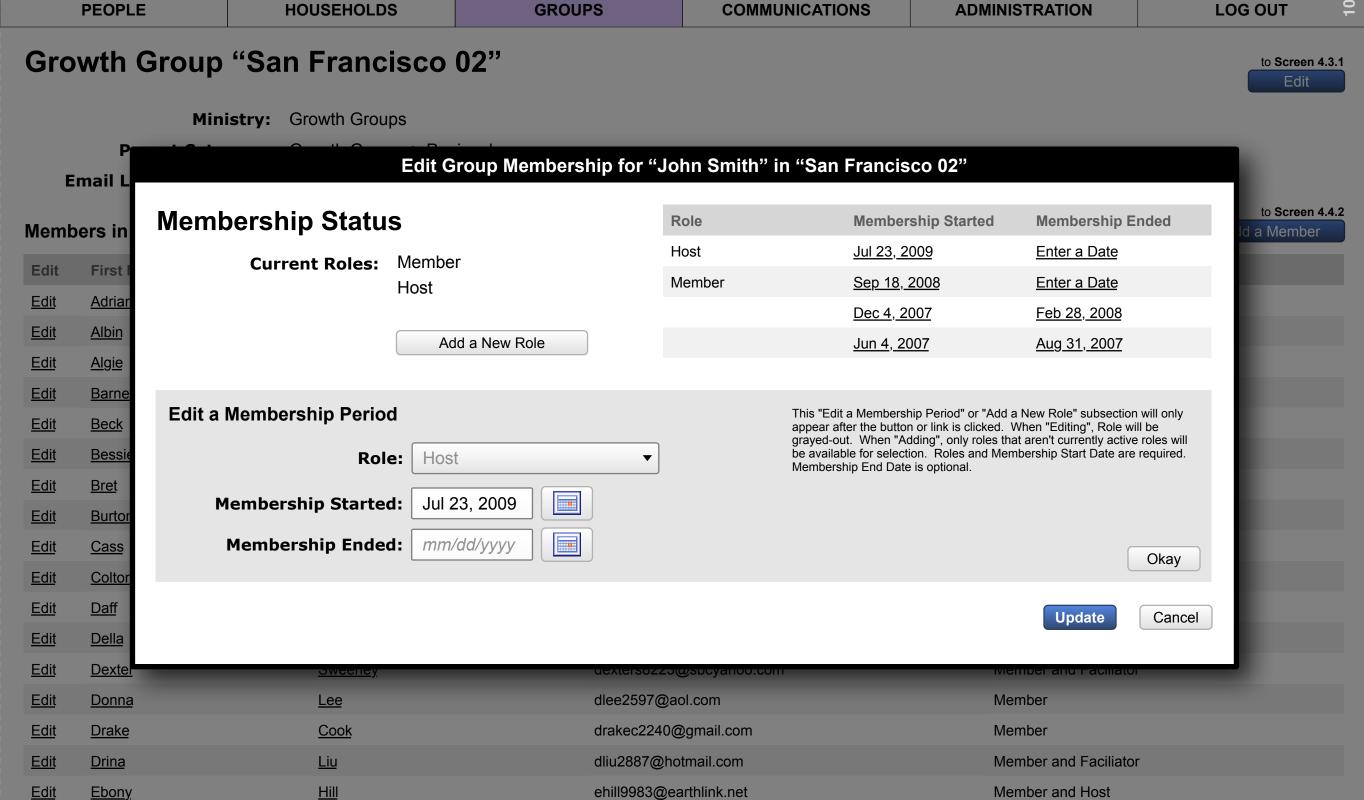
#### ALCF Church Management System IA Membership Subsystem 4.4.1 Edit Group Membership

Edit Group Membership

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

# **ALCF** Church Management System

Welcome, Joe User



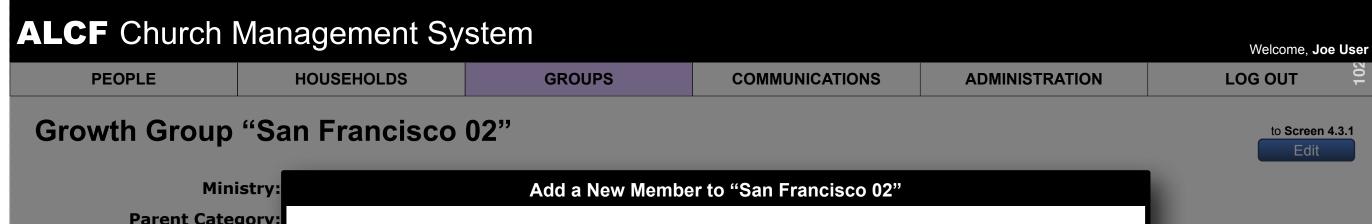
ChMS Main IA.graffle Thu Jan 21 2010 Page 49 of 53 ALCF Church Management System IA Membership Subsystem 4.4.2 Add Group Membership

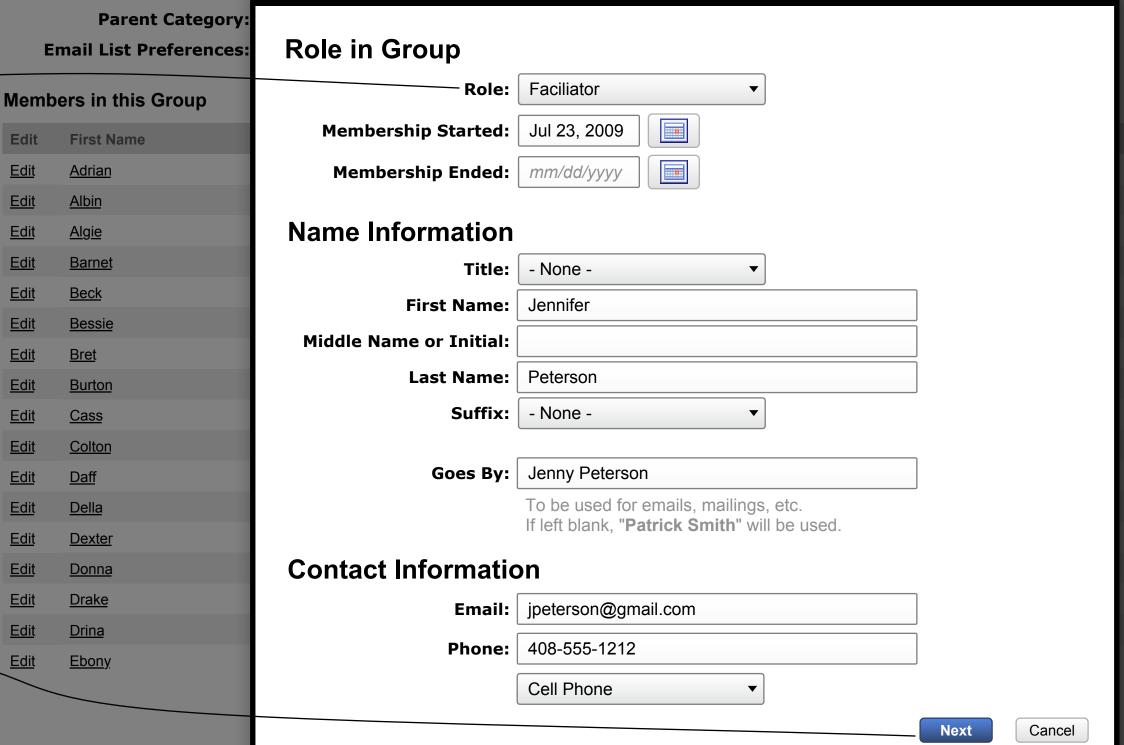
Add Group Membership

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

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**.





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 jps@hotmail.com 285 Maple Drive, Apt. #3 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 <u>Edit</u> <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



Thu Jan 21 2010 Page 51 of 53

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 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"

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

ChMS Main IA.graffle Thu Jan 21 2010

Page 52 of 53

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

ChMS Main IA.graffle Thu Jan 21 2010 Page 53 of 53

