Circles Application Manual

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Introduction

The Circles Web Application is meant to provide a friendly interface for Circles sites to store member, meeting, programming, and training data. This manual will detail how to get started using the application for site management.

If you have not already registered an account, you may do so at [www.circlesdb.com/register](http://www.circlesdb.com/register). Before your account can be activated, you need to indicate which site you will be joining or what site you would like to register.

\*This manual was created for version 1.0 and may be out of date if a newer version is deployed.

Getting Oriented



Figure 1. The tabs that define the organization of the application.

After logging in, you will be redirected to the members tab. There are three main tabs that outline the functions of the application.

* Members - All member data exists in this tab. This is where you will create, update, and delete profiles. You can also search, filter, sort, and export profile data here.
* Meetings – All meeting data exists in this tab. You may schedule meetings, attach training or programming, and take attendance here.
* Learning – All programming and training data exist in this tab. You can create trainings and programming as well as manage which profiles have completed or will need to complete training.

Members

Graphical user interface, application

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Figure 2. Member tab main view.

**Creating Profiles**

Graphical user interface, application

Description automatically generated

To create a member, click on the

button. You will then be asked to enter critical information for the profile. Every profile must be assigned to at least one site through their role at that site. If you have access to more than one site, you will need to pick which site you are creating this profile in.



Figure 3. Required fields for creating a profile

**Editing Profiles**

A picture containing application

Description automatically generatedAfter creating a profile, you will be redirected to the edit screen, where you may fill in the rest of the information for the profile. If you are in the profile detail view, you may click the

button located at the bottom of the profile to edit profile fields.

Graphical user interface

Description automatically generated with low confidence

While viewing a profile, the first tile contains the core information for a profile. Here you can also add a picture of the member.

Figure 4. Core information tile

Graphical user interface, text, application

Description automatically generated

The next tile contains housing information for the member. You may add multiple homes and keep past homes here. The pencil button allows you to edit the data, the trash button allows you to delete the data, and the Add Home Info button allows you to create a new home instance.

Figure 5. Housing information tile

A picture containing shape

Description automatically generatedIf you would like to add children information to the profile, click the button to navigate to the children page.

Graphical user interface, application

Description automatically generated

Figure 6. Edit children page.

Here you will need to create an emergency contact to place the children under. Each child associated with this profile can be placed under one of the emergency contacts created for this profile.

This is the roles tile. You can change the status of the member and add, edit, and delete roles in whatever sites you have access to. A member must always have at least one role, but it does not have to be a current role.

Graphical user interface, text, application

Description automatically generated

Figure 7. Role information tile.

Graphical user interface, application

Description automatically generated

The training tile contains all training themes and modules that are required for this profile. If they are completed by the member, the date completed field will display the date that the member finished this training. The training button will take you to the training tab where you may manage your training modules. You may not edit anything in this tile.

Figure 8. Training information tile

**Searching Profiles**

Now we will switch to the profile search view. The input field at the top of the page is used to search by name in all sites that you have access to. The tools button reveals extra fields that will give you more functionality in your search. The lists select field will apply previously saved search configurations for quick recall. These lists will also be available to take attendance with.

A picture containing graphical user interface

Description automatically generated

Figure 9. The search input, tools button, and list select as seen from the members tab.

Tools

* Filters – first select which profile field you want to filter by, then fill in the filter input. The button will add the filter below so that you may add more filters. You can remove the filter with the x button.
* Sort By – this allows you to group the search results by a field. If you want your results grouped together by current role, select Current Role in the Sort By field.
* Data – if this value is given, the each result will display the profile name, along with the values for the fields specified by the data tool. The buttons allow you to add and remove data fields.
* Create List – this will save the applied filters so that you can quickly access this group of profiles later, e.g., a list of all current circle leaders. If you have access to more than one site, you may want to create a list for each site. These lists will be used to take attendance for your meetings as well.
* Export to Excel – quickly export the current search of profiles and data to an excel file.

Graphical user interface, application

Description automatically generated with medium confidence

Data

Sort

Filters

Figure 10. Annotated toolbox in the members tab.

Meetings

Calendar

Description automatically generated

Figure 11. Meeting tab main view.

**Creating Meetings**

You may view multiple sites’ calendars at one time, so make sure you have the desired site(s) selected. This can be done by clicking the button in the top left.

Graphical user interface, application

Description automatically generated

The sites window will open, in which the left row lists the regions. Click on the region text to display the sites within that region. Checking the box next to the region will select and deselect all the sites within that region. Checking the box for the individual site will select or deselect that site. This same window is also used for the Learning tab.

Figure 12. Site select window.

Calendar

Description automatically generated

Hover over the date you would like to have a meeting. Press the + button in the top left corner.

Figure 13. Add meeting button.

Graphical user interface

Description automatically generated

The meeting information slide will pop up.

* Make sure to choose the site and meeting type.
* If you would like to make duplicate meetings on multiple dates, select more than one date with the date picker.
* Attach programming that you make in the Learning tab.
* Attach training that you create in the learning tab. In the attendance portion of the meeting, you may choose if you would like your attendees to complete the attached trainings.
* Write notes in the main section.
* Link to outside sites.
* Attach files to the meeting.
* You must save after every change.

Meeting Type

Notes

Links

Files

Figure 14. Meeting slide.

**Meeting Attendance**

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Click on the button to open the attendance slide.

Graphical user interface, application

Description automatically generated

In order to take attendance, you must select the lists that you would like to add to the meeting (lists were created earlier in the members tab). The create lists button will take you to the members tab so that you can create a list. More than one list may be selected.

Figure 15. Attendance slide with the list select open.

If you have a training attached to the meeting, you may give the attending profiles a completion for that training. To pick who receives the completion click on . You may pick for all attendees to receive the completion, or you can select individual attendees.

Graphical user interface, application

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Graphical user interface, text, application

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Figure 16. Taking attendance with a training attached. Figure 17. Selecting attendees to receive training.