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# General Topics

## Understanding Roles

### *All Users*

Just like no single person represents the entire body of the church, no single person has permission to do all things through the web site. To accomplish this security measure, different tasks performed in the site are provided to people of specific roles. To grant or remove permissions from a user, follow the steps detailed on page 17.

To change the permissions of a member, follow the directions in the “Changing User Permissions”, detailed on page 18.

#### Contributor:

A *contributor* is a person within a group who is able to add and remove content from the group’s web page.

#### Moderator:

A *moderator* is a person within a group who is able to accept pending members, add and remove members, and change user permissions for members within the group.

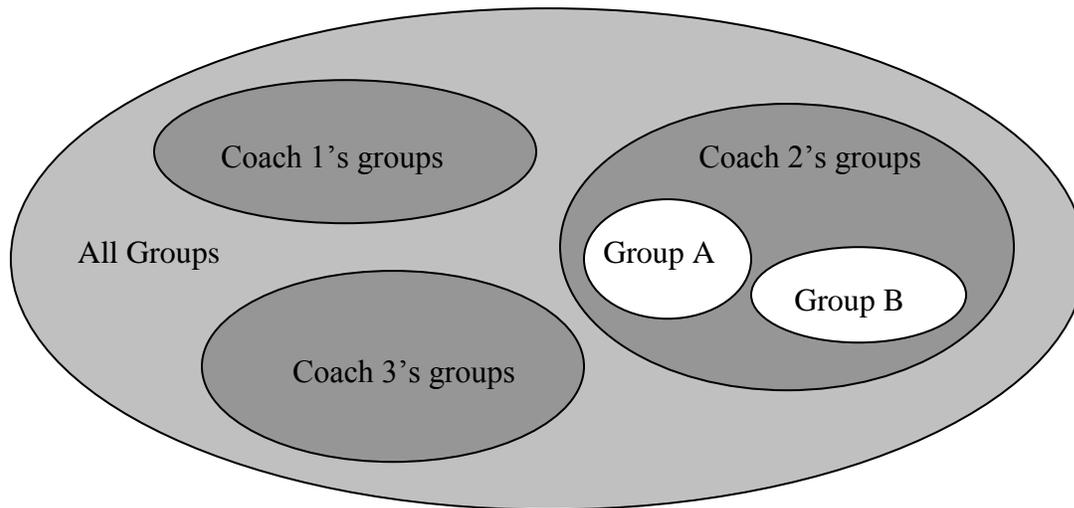
#### Leader:

A *leader* is a person within a group who is non-revocable *moderator* and is listed as the leader of that group.

## Understanding Group Topography

### All Users

Our website supports tree-like organization structures. An example tree-like group structure is shown in Figure 1:



**Figure 1 Group Topography Graph**

As shown in the diagram above, each group falls within a coaching region (a supergroup), which in turn falls within the All Groups group. For example, if a member is part of Group B, they are also a participant of 'Coach 2's groups'.

NOTE: All users are part of the Authenticated Users group.

In the future, coaching regions will fall under senior coaching regions.

Logically, each group falls into a parent group. Each group in our system has a group web page. Similarly, each supergroup also has a web page. All persons in any group within the supergroup are able to view the supergroup's web page. NOTE: Only the leader of the supergroup and contributors of the supergroup are permitted to modify documents within the supergroup page.

- To find out what groups you are part of, click on "My Groups". "My Groups" is detailed on page 5.
- To traverse the entire group hierarchy, click on "All Groups". Clicking on a group will take you within that group to view its subgroups.

NOTE: To view parts of the site that are not visible to everyone, you must be logged in to the site. Steps to login to the website are detailed in the General Website User's Guide.

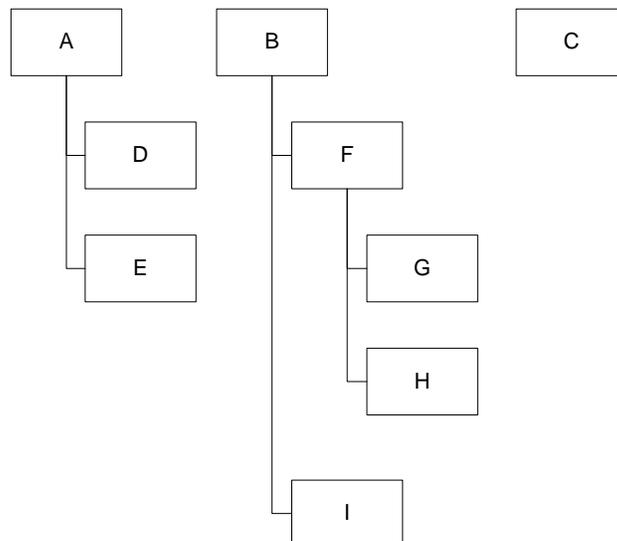
# Understanding the Security Model

## *All Moderators and All Contributors*

Each page on the site is associated with a particular security group. To view content on the site, a user must be part of the group that the content is associated with.

Groups are able to be defined as subgroups of other groups. The following examples refer to the diagram shown in Figure 1. Group security has the following characteristics:

- Content can be viewed by any group above it in the tree
  - Example: A member of group G can see content for group F and group B
- Content can not be viewed by any group below it in the tree
  - Example: A member of group F can not see content for group G or H
- Content can not be viewed laterally at a particular level
  - Example: A member of group D can not see content for group E
- Group membership can be moderated by the group immediately above that group in the tree
  - Example: A member of group B can moderate groups F and I
  - Moderators can see the profiles of group members and the profiles of group members for this group and one level down in the tree
- A zone can be configured so that a group can be moderated by all groups above it in the tree
  - Example: A member of group B can moderate groups F, G, H, and I
- Moderators can see the profiles of group members and the profiles of group members for this group and all groups below in the tree
- Members can only see the profiles of others in a group if they are members in the group, and the group is tagged to allow members to be able to see each others' profiles



**Figure 2 Group Security Diagram**

## Viewing your Group Membership

### *All Users*

The “My Groups” page (Figure 3) allows you to be able to see which groups you are a part of. My Groups displays all of the groups you are a part of in a particular area of the site, for example, Small Groups. It will not show groups that you are a part of in other areas of the site. Additionally, My Groups also displays the groups for which you are a pending member.

To view what groups you are a part of:

- Log on to the site
- In the “my” bar on the left side, select “My Groups”

The “My Groups” page displays all of the groups that you are a part of. Regular groups will appear on the left side of the page. Security groups (groups that support tools on the website) will appear on the right side of the page.

To go to your group’s page:

- Go to the “My Groups” page (detailed above)
- Click the “Group Web Page” button under the appropriate group’s name

To go to your group membership page:

- Go to the “My Groups” page (detailed above)
- Select the “Group Membership” link under the appropriate group’s name

To remove yourself from a group:

- Go to the “My Groups” page (detailed above)
- Either switch to “Edit” mode (detailed on page 3) or select the “Remove me from a group” Fast Task link
- Select the “Remove me from this group” link next to the appropriate group’s name
- Select OK in the confirmation box that appears

To remove yourself from a pending group:

- Go to the “My Groups” page (detailed above)
- Select the “Remove me from this pending group” link next to the appropriate group’s name
- Select OK in the confirmation box that appears

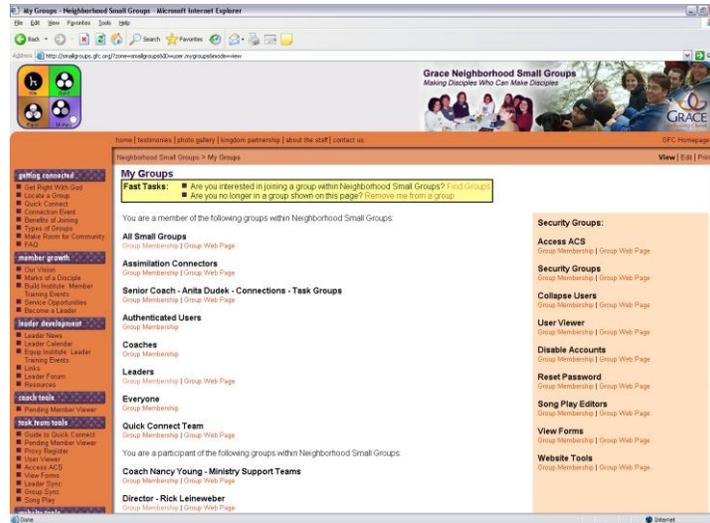


Figure 3 "My Groups" page

## Looking up Contact Information of a Group Member

### *All Moderators and Group Members*

The site allows users of a group to be able to see the contact information of other members of a group. The moderators are always able to see this information. Members of a group are able to see each other's information if the group's details are configured to allow this.

To look up contact information for a member of a group:

- Go to your group's membership page (detailed on page 5)
- Select the name of the member you want to contact (Figure 4, Figure 5)



**Figure 4** User's profile located within hyperlink of member's name (in View mode)



**Figure 5** User's profile located within hyperlink of member's name (in Edit mode)

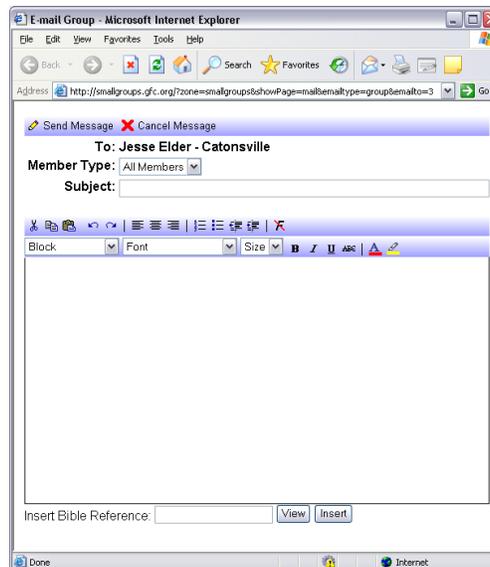
## E-mailing Your Group Members

### All Moderators

You may wish to e-mail members of your group. You can do this through the web site. By using the web site, you ensure that you are e-mailing all members with the up-to-date, on-file e-mail addresses.

To e-mail group members:

- Within your Group Web page from the “My Groups” page (detailed on page 5)
- Click  **Edit** in the “Members” area of the page.
- Click  **Send E-mail to All Group Members**. This will display a new window, shown in Figure 6.
- Fill out the subject and the message.
- If you are within a non-leaf group (such as a Coaching group) and would like to send the message to all members in that group and all of the derived subgroups, select “All Members and Subgroup Members” in the “Member Type” field.
- Then click  **Send Message**.



**Figure 6 E-mail to Group Members**

# The Report Wizard: Group Reports

## All Moderators

Once your group is entirely listed on the web, there are many things that you can do including: view a printable group roster, print out mailing labels, a birthday list, an attendance sheet and more.

To access the Reports of your group:

- Go to your Group’s Membership page from the “My Groups” page (detailed on page 5)
- Within in the Details box, click the “Report” button. The Report wizard is displayed, shown in Figure 7 and Figure 8.
- Within the “Type of Report” field, select the desired report and click “Next”.
- The following types of reports are available:
  - Attendance List
  - Group Roster
  - Group Tree (including an Organizational Chart)
  - Members (export to spreadsheet, Delorme, GPX, or Google Earth)
  - Birthdays
  - Google Map
  - Mailing Labels
  - Name Tags
  - Pending Member Report
  - Picture Directory
  - Subgroups (export to spreadsheet)
- Some reports may offer additional options. Fill in the additional options for the report and click “Next”.
- Click the “Finish” button to view the report.

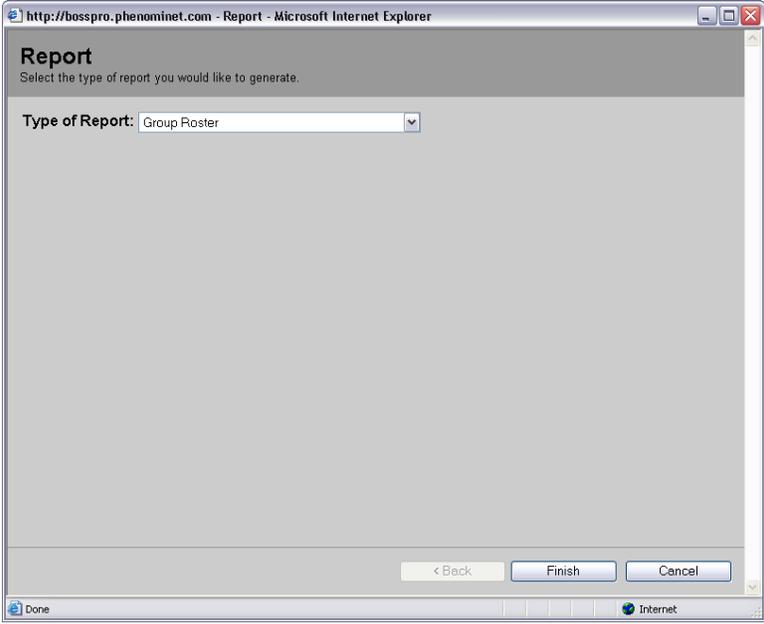
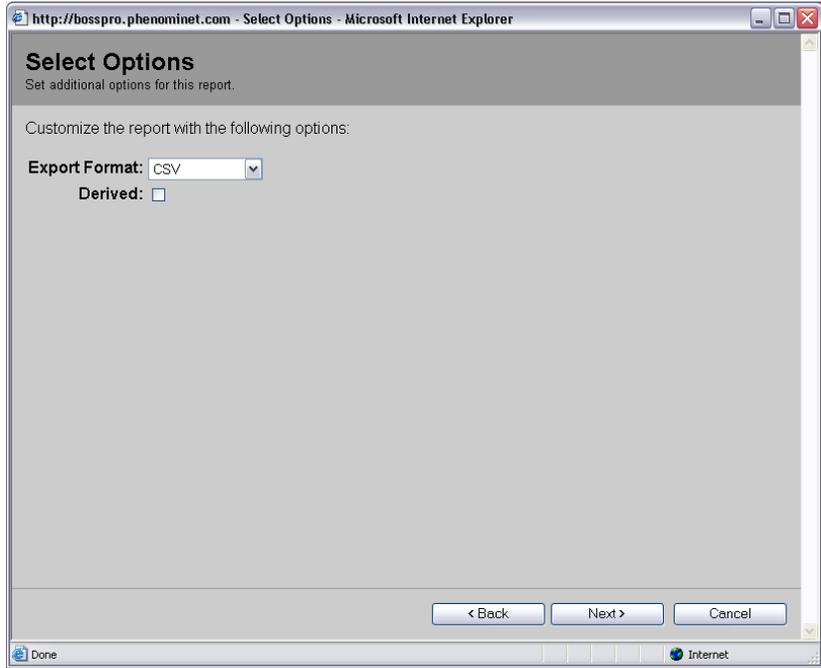


Figure 7 Report wizard within Group Membership Page



**Figure 8 Report Options**

## Searching for a Group

### *Selected Moderators*

All Groups provides the ability to find information about groups of the website. When you go to All Groups, you can click on “Group Search”, which will present a search form where you can search for groups with the following criteria:

- Name
- Location Name
- Address
- City
- State
- Zip
- Type
- Time
- Duration
- Description
- Class (Major category of group: for example, “Small Group”, “Security Group”, “Service / Task Team”)
- Status (Open / Closed)



**Figure 9 Group Search**

<b>Name:</b>	<input type="text"/>
<b>Location Name:</b>	<input type="text"/>
<b>Address:</b>	<input type="text"/>
<b>City:</b>	<input type="text"/>
<b>State:</b>	<input type="text"/>
<b>Zip:</b>	<input type="text"/>
<b>Type:</b>	<input type="text"/>
<b>Time:</b>	<input type="text"/>
<b>Duration:</b>	<input type="text"/>
<b>Description:</b>	<input type="text"/>
<b>Class:</b>	<input type="checkbox"/> Small Group <input type="checkbox"/> Service/Task Team <input type="checkbox"/> Security Group
<b>Status:</b>	<input type="radio"/> Open <input type="radio"/> Closed <input checked="" type="radio"/> Both
	<input type="button" value="Search"/> <input type="button" value="Cancel"/>

**Figure 10 Group Search form**

Once the search parameters are entered, click “Search” and the results will be displayed.

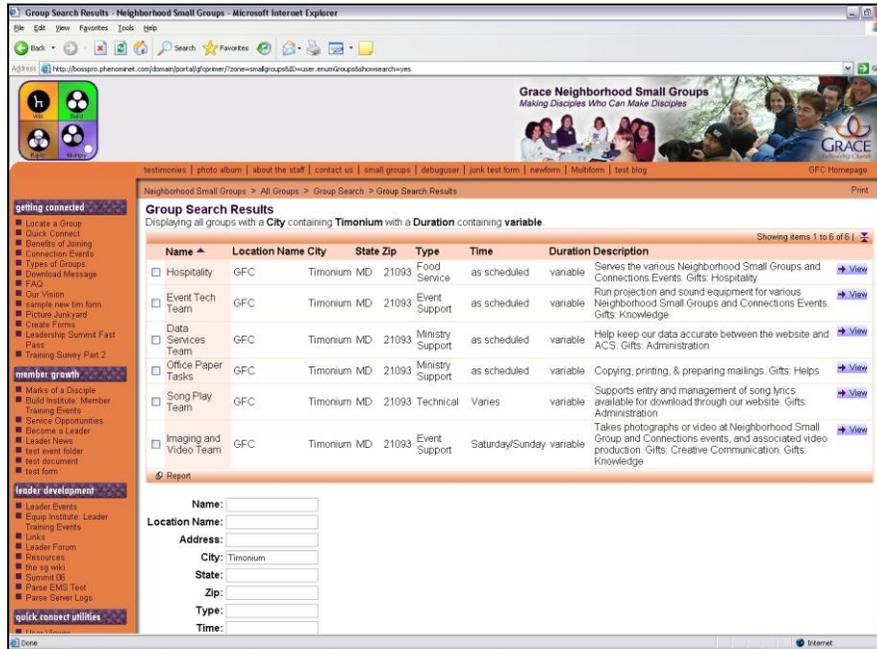


Figure 11 Group Search Results

Reports of the results window can be generated. The following reports are supported:

- Export (to XML, CSV, or Text and Tabs)
- Google Map
- Mailing Labels



Figure 12 Report button

From the results, click on either the group’s name or “View” to get to the group membership page.

Additionally, once at a group membership page, you can search for nearby users or groups by clicking “Find Nearby Users” or “Find Nearby Groups”. The results of “Find Nearby Users” will appear in the User Viewer.



Figure 13 Find Nearby Users button



Figure 14 Find Nearby Groups button

Search for all groups near **Event Tech Team**.

**Radius (Miles):**

**Class:**  Small Group  Service/Task Team  Security Group

**Status:**  Open  Closed  Both

**Figure 15 Proximity Group Search form**

# Group Membership Topics

## Creating a Group or Adding a Subgroup to a Group

### All Moderators

If your group has subgroups inside of itself, this can be represented by the website.

To add a subgroup:

- Within your Group Web page from the “My Groups” page (detailed on page 5)
- Click  **Edit** in the “Groups” area of the page.
- Click  **New Subgroup**
- Fill in the fields to describe the information about the subgroup (shown in Figure 16)
- Click “Add”.
- Once the group is created, click on the group in the “Groups” area of the page to view that group.
- You can now add members and set up who is the leader, the contributors, and the moderators of the group

#### New Subgroup

**Name:**

**Location:**  Yes  No

**\* Location Name:**

**\* Address:**

**\* City:**

**\* County:**  If you live in Baltimore City, please enter 'Baltimore City'

**\* State:**

**\* Zip:**

**\* Type:**

**\* Time:**

**\* Duration:**

**Description:**

**Status:**  Open  Closed

**Class:**  Small Group  Service/Task Team  Security Group

**Members Visible:**  Members of Group Visible to Members

Figure 16 New Subgroup

# Modifying Group Details, such as Location and Type

## All Moderators

Over time, the location of your group may change. The type of group might change as well. Follow these directions to change the group details, including the group type, group location, and group name.

NOTE: The web site requires that you provide a street address of the location of your group. This street address is not displayed to people unless they are part of your group. It is used in calculating the closest group geographically.

NOTE: If you have not yet provided a full street address for where your group meets, please update your group location as soon as possible. By providing a street address, the locator feature will improve in accuracy.

To change group details:

- Within your Group Web page from the “My Groups” page (detailed on page 5)
- Click  **Edit** in the “Details” area of the page.
- Change necessary fields displayed (shown in Figure 17).
- Click the “Update” button

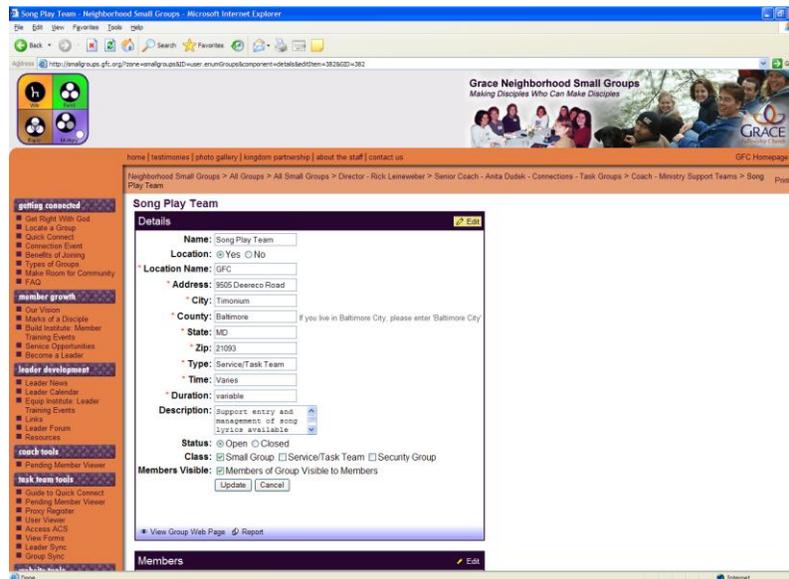


Figure 17 Edit Group Details within Group Membership Page

## Changing the Permissions of Group Members

### *All Moderators*

Part of being in a group is delegating roles. This concept continues into your group's presence online. You are able to permit members of your group to be able to handle membership and content management roles within the web site. The Contributor and Moderator roles are detailed on page 3.

#### Contributor Icons



= Member is a contributor



= Member is a non-contributor

#### Moderator Icons



= Member is a moderator



= Member is a non-moderator

To change whether a member is a Contributor:

- Within your Group Web page from the “My Groups” page (detailed on page 5)
- Click  Edit in the “Members” area of the page.
- Click on the Contributor icon (shown above)  
NOTE: Clicking the icon a second time will undo the previous action.

To change whether a member is a Moderator:

- Within your Group Web page from the “My Groups” page (detailed on page 5)
- Click  Edit in the “Members” area of the page.
- Click on the Moderator icon (shown above)  
NOTE: Clicking the icon a second time will undo the previous action.

## Adding and Removing Group Members

### All Moderators

As your group changes, you will need to keep your group's list of members up to date. You need to be a moderator of the group for these features to be available.

To add a member to a group:

- Go to your group's membership page (detailed on page 5)
- Click  Edit in the "Members" bar
- Click "Add Member" button. The Add Member bar is displayed, shown in Figure 18.
- Select the person from the list
  - This displays a list of all active accounts in the system. If you do not see the person you want to add in the list, either get them to sign up on the site, or provide their contact information to Anita Dudek to have an account created on their behalf.
- Click "Add" button

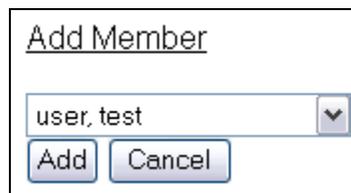


Figure 18 Add Member bar

To remove a member to a group:

- Go to your group's membership page (detailed on page 5)
- Click  Edit in the "Members" bar
- For the member that you wish to remove, click "Remove" button (shown in Figure 19)
- Click OK in the confirmation box that appears



Figure 19 Remove button next to member's name within the Members box

# Setting the Leader of a Group

## *All Moderators*

The website allows a single member of a group to be designated as the leader of the group. When someone is made the leader of a group, that person will automatically receive Moderator and Contributor privileges for that group.

### Leader Icons



= Member is not the leader



= Member is the leader

To change whether a member is a Leader:

- Within your Group Web page from the “My Groups” page (detailed on page 5)
- Click  Edit in the “Members” area of the page.

Click on the Leader icon (shown above)

NOTE: Unlike the moderator and contributor icons, Clicking the icon a second time will NOT undo the previous action.

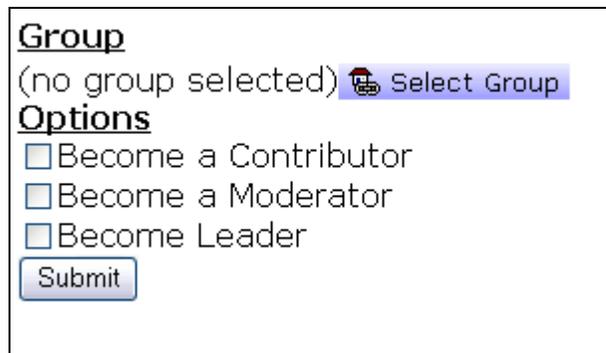
## Group Force Add

### Site Administrators

If you are not part of a group, but are part of the Group Force Add group, you can use Group Force Add to add yourself to any group in the system. Use of this tool is logged, and moderators of the group are e-mailed that a group force add was performed.

To add yourself to a group:

- From the Select Group popup, select “Select Group” and find the group in the tree view
- Click OK
- Select any additional attributes that you would like to have access to
- Click Submit
- You will be added to the group



The image shows a dialog box titled "Group" with the following content:

**Group**  
(no group selected)  Select Group

**Options**

- Become a Contributor
- Become a Moderator
- Become Leader

Figure 20 Group Force Add

# **Pending Membership Topics**

## **Dealing with Pending Members**

### ***All Moderators***

When someone browses to the website and uses the locator to find your group or the person finds your group and they wish to learn more, they will click on a link (titled “Please contact me about this group”) and then they will become a ‘Pending Member’ of your group. You (and any other moderators in your group) will immediately receive an e-mail notifying that you have a new pending member.

It is your responsibility to contact the pending member and discuss with them if they are a fit candidate to check out your group. If they are, please invite them to check out your group. For privacy reasons, we do not provide group location directions or group contact information to pending members. If a person is not a good fit for your group, please decline the pending member. Steps to Decline a Pending Member are detailed on page 26.

If the pending member visits your group and becomes a regular member of your group, please “Accept” the pending member. Accepting the member makes them a permanent addition to your group. Once accepted, they will gain access to your group’s web page, the ability to e-mail other group members via the web page and will receive access to your group’s address information. Steps to Accept a Pending Member are detailed on page 25.

## Viewing your List of Pending Members

### All Moderators

Your group membership page shows a list of all of the pending members presently interested in your group. Until they are promoted to full membership in your group, or they are declined, they will continue to be shown in this list and you are responsible to continue maintaining contact with these persons. Contact with these persons should be added to the Contact Log (detailed on page 23). To decline a pending member, follow the instructions on page 26.

To view the list of Pending Members in your group

- Go to your Group's Membership page from the "My Groups" page (detailed on page 5)
- Within the "Pending Members" box, the list of Pending Members of your group is displayed, shown in Figure 21. The initial date when they were added to your Pending Member list is displayed in parenthesis.

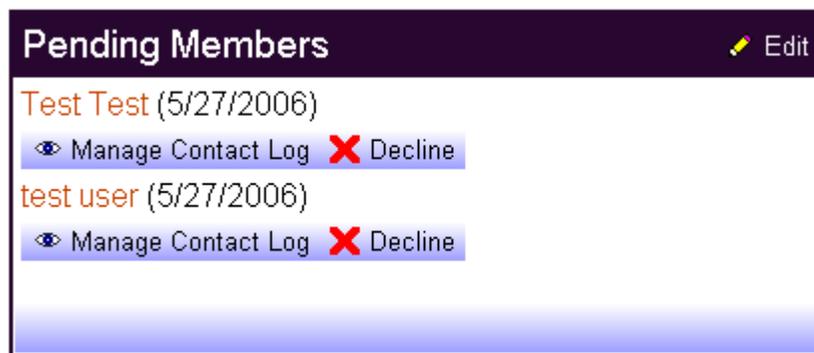


Figure 21 Pending Members box within Group Membership Page

## Accessing the Contact Log for a Pending Member

### All Moderators

We value the interest of Pending Members in our system. Therefore, we have tools that assist in our tracking of conversations with our pending members.

**NOTE: It is essential that representatives from groups use our Contact Log tools to help us keep our data up-to-date and assure that we are helping our pending members make their way into a group and perhaps our church.**

As the Contact Log is a shared resource, supervising coaches or staff may add entries to the log.

To view the entries in the Contact Log:

- Go to your Group's Membership page from the "My Groups" page (detailed on page 5)
- Within the "Pending Members" box, click "Manage Contact Log" under the Pending Member whose Contact Log you would like to review.
- The Contact Log for that Pending Member will be shown in a new window, shown in Figure 22.

To add an entry to the Contact Log

- Follow the instructions above to view the entries in the Contact Log.
- Click the "Add Entry to Contact Log" button.
- The "Add Entry To Contact Log" wizard will be displayed, shown in Figure 23.
- If you initiated the contact with the Pending Member, select "Contact (initiated by group member)", otherwise select "Contact (initiated by pending member)".
- Click "Next >" button.
- Follow the appropriate on-screen prompts to add an entry to the Contact Log.

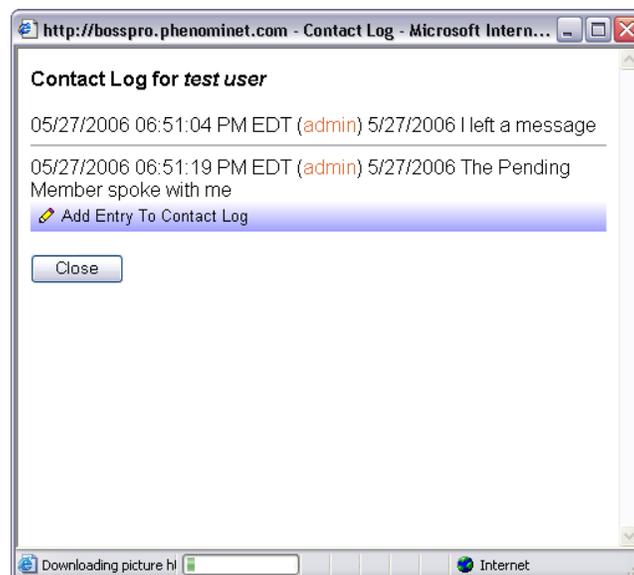
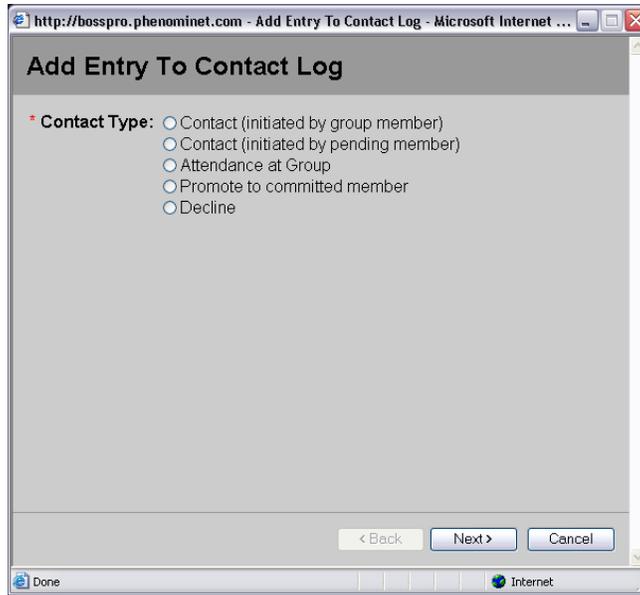


Figure 22 Contact Log



**Figure 23 Add Entry To Contact Log wizard**

## **Promoting a Pending Member to Full Membership Status**

### ***All Moderators***

After you have verified that a Pending Member is acceptable to be a full member of your group (which varies depending on the context of the group), it is important that you promote them to full membership status. Until they are promoted, they will not be able to see the Group Web Page or access most information within the Group Membership Page.

To promote a Pending member to Full Membership Status (for sites that use a Contact Log)

- Go to your Group's Membership page from the "My Groups" page (detailed on page 5)
- Within the "Pending Members" box, click "Manage Contact Log" under the Pending Member who you would like to promote to a full member.
- Click "Add Entry To Contact Log" button
- In the "Add Entry to Contact Log" wizard, select "Promote to committed member"
- Click "Next >" button
- Checkmark that you agree that this person is really a committed member of your group. Enter any comments you may have.
- Click the "Finish" button.
- Click the "Close" button.
- Click the "Close" button.
- When you "refresh" the Group Membership Page, the Pending Member will now appear within the Members box.

To promote a Pending Member to Full Membership Status (for sites that do not use a Contact Log)

- Go to your Group's Membership page from the "My Groups" page (detailed on page 5)
- Within the "Pending Members" box, click "Accept" next to the Pending Member that you would like to promote to a full member.
- The Pending Member will now appear within the Members box.

## **Declining a Pending Member**

### ***All Moderators***

If a person is no longer interested in your group or they do not fit the criteria for your group, you are then able to decline them from your Pending Member list.

To decline a Pending Member (for sites that use a Contact Log)

- Go to your Group's Membership page from the "My Groups" page (detailed on page 5)
- Within the "Pending Members" box, click "Manage Contact Log" under the Pending Member who you would like decline.
- The "Add Entry To Contact Log" wizard will appear.
- Click "Next >" button to begin the Decline process.
- Enter a comment of why this person is being declined (this is required).
- Click the "Finish" button.
- Click the "Close" button.
- The Pending Member will disappear from the Pending Members box.

To decline a Pending Member (for sites that do not use a Contact Log)

- Go to your Group's Membership page from the "My Groups" page (detailed on page 5)
- Within the "Pending Members" box, click "Decline" next to the Pending Member that you would like to decline.
- A confirmation prompt will be displayed. Click "OK" to confirm that the Pending Member will be declined.
- The Pending Member will disappear from the Pending Members box.