

Advanced Group Leader Procedures

Group Protocols

What is a Group?

- A Church Community Builder Group is a way people can be associated with each other within the site. People might be actively participating in the Group, logging in, posting to group discussions, accepting positions, and attending events. Or, they may not even be aware the Group exists.
- Every group starts with one Main Group Leader, and also has additional group participants, who can either be Assistant Leaders or just plain Members. In addition, there are people who have been invited to the group or are requesting to be added to the group. *All* these people have some sort of *status* in the group, and their association with the group allows you, as a church leader, to interact with them in a few different ways.
- Group Leaders, Assistant Leaders have privileges to
 - Add/Change/Delete events
 - Request resources
 - Add/Remove/Edit participants in the group
 - Add files
 - Send messages
 - Create positions and schedules

Info

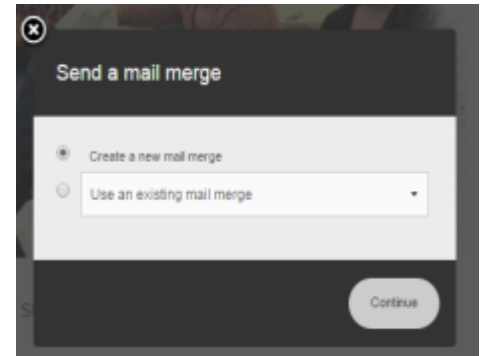
- This is the homepage tab for the group. Group leaders and the group picture is visible from this page.

Edit Participants (Group Leaders)

- This is where one can add, invite, or remove participants
 - To add a participant to the group click add or invite new people in the top right hand corner
 - To remove members of the group click the check box by their name. After marking the checkbox, click the drop down box in the upper left hand corner and change its value to remove from group, then click ok.

Send Mail Merge (Group Leaders)

- The Mail Merge feature allows you to create and save both email and print versions of a letter you wish to send to specific people.
- Select new mail merge. Add a name, subject, and body to the mail merge. (Note. If all fields are not populated the mail merge will not send)
- Select choose recipients at the top of the screen
- Choose from group and click add recipients
- Flip email version to “yes” and click send



Messages (Group Leaders & Members)

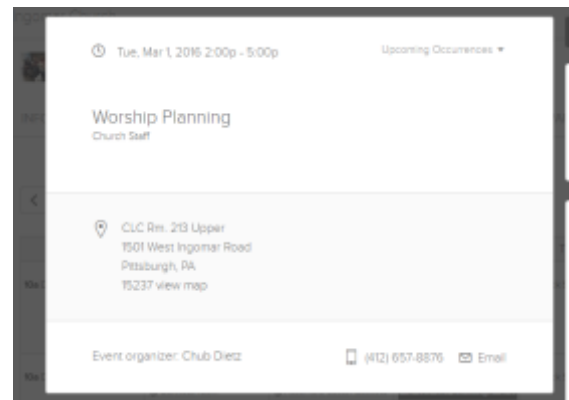
- The message tab works like email, to create a new message click the new message box in the upper right hand corner.
- A pop up box will display multiple options
 - Send message to (all participants or group leaders)
 - Group leaders can also send to specific people
 - Send to
 - All Participants – Allows members to comment and interact
 - Only Me – Don't allow comments
 - No One – Don't allow comments
 - Subject field – Subject of the message
 - Composition field – Body of the message
- This pop up allows for attachments, but be aware you can only attach 3 files per message



Calendar (All Members)

- The calendar tab shows dates for all **group** related events.
- Clicking on an event within the calendar will open a screen That shows a more detailed description of the event

Monday	Tuesday	Wednesd
29 a Counters :30a Meeting with Tyco) Connect Team) Grief Support p Orchestra Rehearsal	1 2p Worship Planning	
7 a Counters) Connect Team) Grief Support	8 10a Organ Tuning 1p Assemble Easter Baskets 2p Worship Planning	CPR/First Aid Train CPR/First Aid Train CPR/First Aid Train



Needs

Needs are connected to groups. Leaders may create and track needs in their group. All members have the ability to create needs.

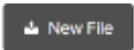
- On the group homepage, click on the Needs tab. The Needs are displayed at the bottom of the screen. Click new need.
- A new need page will open, from here enter the details of your need (Name, Location, Coordinator, Requested Items). When finished requesting items click save.

The screenshot shows a web form titled 'Details' for creating a need. The form is divided into three main sections:

- Details:** Includes a 'Group Name' field with the value 'Jackson Small Group', a 'Need Name' text input field, a 'Description' text area, and a 'Coordinator' dropdown menu with 'Sarah Jackson' selected.
- Location (optional):** Includes fields for 'Location Name', 'Street', 'City', 'State' (with a 'Select...' dropdown), 'Postal Code', and 'Country' (with a 'Choose...' dropdown).
- Requested Items:** A table with two columns: 'Requested Item' and 'Date'. It contains seven rows, each with empty input fields and a red 'X' icon for deletion. A link 'Add more lines...' is at the bottom of the table.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

Files (Group Leaders & Members depending on settings)

- To upload files from the Group overview page, select the Files tab and click 
- The next window will prompt you to choose a file. You can give the file a label and a description, but this is not mandatory
- To delete a file select files in the group header, then click delete on the right hand side of the file.

Group Event Protocols

Creating an Event (Group Leaders)

NOTE – For pictorial on how to set up an event using the steps below, see [here](#).

- Go to calendar tab, select the date you wish to have the event on.
- Check either rooms & resources needed or rooms & resources not needed. If you need rooms or resources **after you save your event** you must go to Rooms & Resources and request the room or resource.

- Fill out all fields on the form
 - Do not use all day event checkbox
 - Choose a start and end time for the event
 - Calculate setup and cleanup time before and after event

Note. If any of these credentials are missing or incorrect the event will be denied

Rooms and Resources (Group Leaders)

NOTE – For pictorial on how to reserve rooms and resources (as part of setting up an event) using the steps below, see [here](#).

- Navigate back to the group calendar and click on the event. Select manage event (upper right hand corner)
 - Select Rooms & Resources in the header and click Request Rooms & Resources
 - Drag and drop the rooms you wish to use for your event.
 - Add anything important about the setup of the room in the General Setup Notes field. (Resources will be available in the future for example extra tables or chairs. For now add resources into the general setup notes)
- Note. If nothing is entered in to this field, the event request will be denied.

Attendance (Group Leaders)

- Before attendance can be taken you need to set attendance settings – send attendance reminder, set max limit (if any), select attendance grouping.
 - Navigate back to the group calendar, and select the event you wish to record attendance.
 - Click manage event in the upper right hand corner
 - Select the attendance tab and click record attendance
 - Attendance can be recorded two ways:
 - Typing a members name into the search field, then selecting them
 - Manual searching and checking the check box next to the members name
 - Once all members have been recorded scroll to the bottom of the page and choose who to send the attendance report to.
- Note. ICONNECT will notify the leaders of the group who got attendance.

Email an event summary to:

- Leadership only (group leaders, coaches, directors)
- The entire group and the leadership
- No one - Don't send an email.

- Finish by clicking save. **Note. If you do not click save and leave the screen nothing will be saved.**