

VC Arena Small Group Leader Toolbox

A Guide for Small Group Leaders

Table of Contents

Overview..... 1

Sign In..... 3

My Account..... 5

Edit Small Group Details..... 7

 Update Group Roster..... 8

 Add Member..... 9

 Record Attendance..... 12

 Track Attendance..... 13

 Communications..... 14

Overview

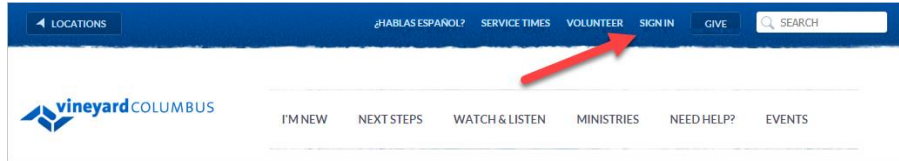
Here at Vineyard Columbus we think involvement in a Small Group community is essential for someone to develop fully as a disciple of Jesus. In order to best care for our large congregation, we need a way to track who is participating in groups. For this reason we are rolling out a **Small Group Leader Toolbox** as a way to maintain updated, accurate information. Small Group leaders will be able to login to VineyardColumbus.org to edit the details of their group; keep information about who is participating; mark attendance for each meeting; and easily message their group.

This guide describes how to accomplish these tasks.

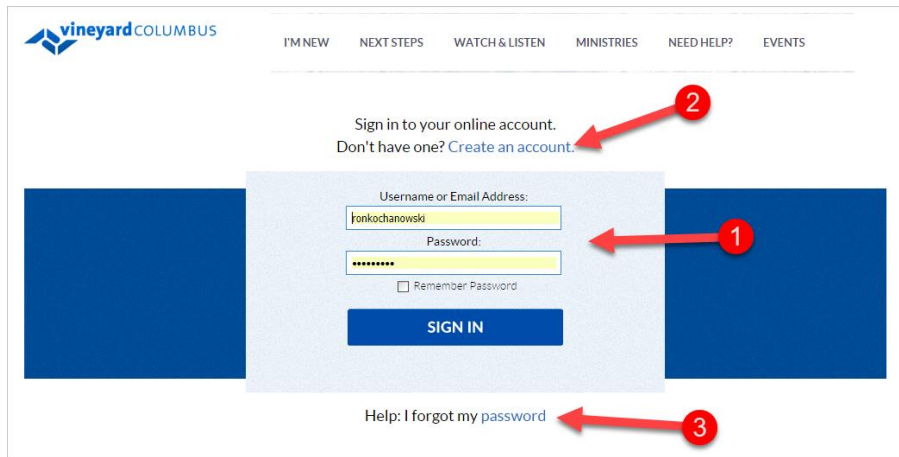
Sign In

Using the Leader Toolbox requires that you first sign in. Go to <http://www.vineyardcolumbus.org/> and click the SIGN IN button in the header menu.

****If you are using a mobile device you will need to turn your phone horizontal to see the 'Sign In' option.**



The next screen is where you login.

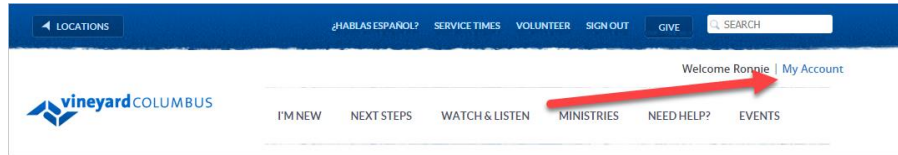


1. If you have already created a login to Give Online or to Register for an event, taken Leadership Commitment Training, or you serve in an area where a login has been created for you, then that same login information will work here. Enter your username and password and click the SIGN IN button.
2. If you have never logged into Vineyard Columbus, click 'Create an account'. This will take you to a screen that collects basic personal information that can be used to match you to the information we currently have in the system. After filling in the form, click 'Register'.
3. If you've forgotten your password, click this link. Fill in the requested details and click 'Submit'. An email will be sent to you with a temporary password. The password is already Case Sensitive, must be at least six characters with at least one Capital Letter and at least one numeral.

My Account

After you are signed in, you'll be back at the VC Home Page and there will be a welcome message in the upper right portion of the screen. Click on 'My Account'.

****If you are using a mobile device you will need to turn your phone horizontal to see the 'My Account' option.**



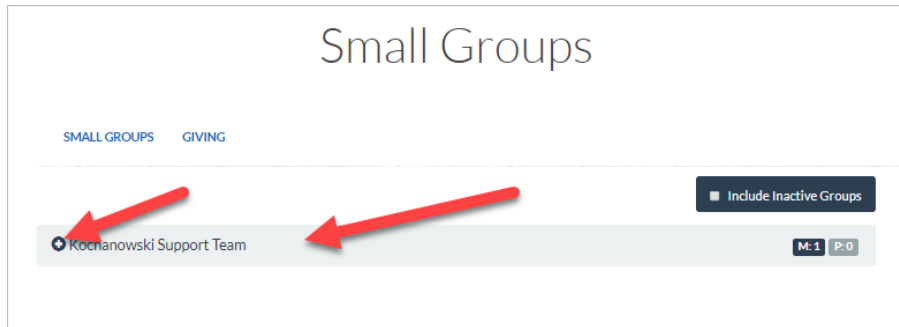
The 'My Account' screen displays basic information about you and your immediate family. You have the ability to update these details so that we can better communicate with you should you move, change your phone number(s), or email address.

If your significant other, or children's information changes, you can click on their name to the right and update the details for them as well.

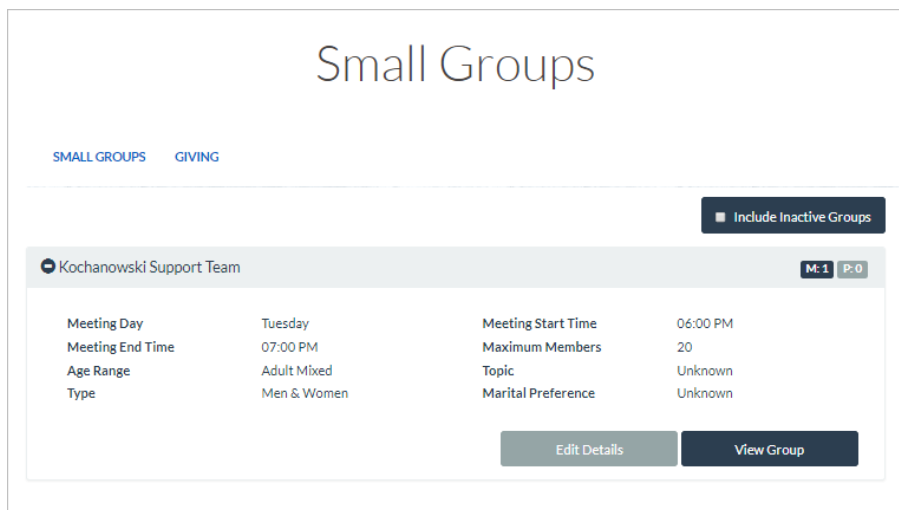
A screenshot of the 'My Account' profile page. The title 'My Account' is at the top center. Below it are two tabs: 'SMALL GROUPS' and 'GIVING'. The main form area contains several input fields: 'First Name' (Ronnie), 'Last Name' (Kochanowski), 'Home Phone' ((614) 289-3046), 'Work Phone' ((614) 259-5337), 'Cell Phone' ((413) 896-9360), 'Email' (ron.kochanowski@vineyardcolumbus.org), 'Street Address' (6107 Deansboro Dr), 'City' (Westerville), 'State' (Ohio), 'Zip Code' (43081-7066), 'Country' (United States), 'Birth Date' (2/24/1962), 'Marital Status' (Married), and 'Gender' (Male). There is a checkbox for 'Enable SMS' which is checked. A 'Notes' section with a text area is at the bottom. On the right side, there is a 'Change Family Member' section with a button labeled 'Lynn Kochanowski'. A 'Submit' button is at the bottom center of the form.

Edit Small Group Details

Hovering over the 'Small Groups' menu at the top of the My Account screen will display two additional menu items, Small Group Finder, and Leader Toolbox. Click on Leader Toolbox.



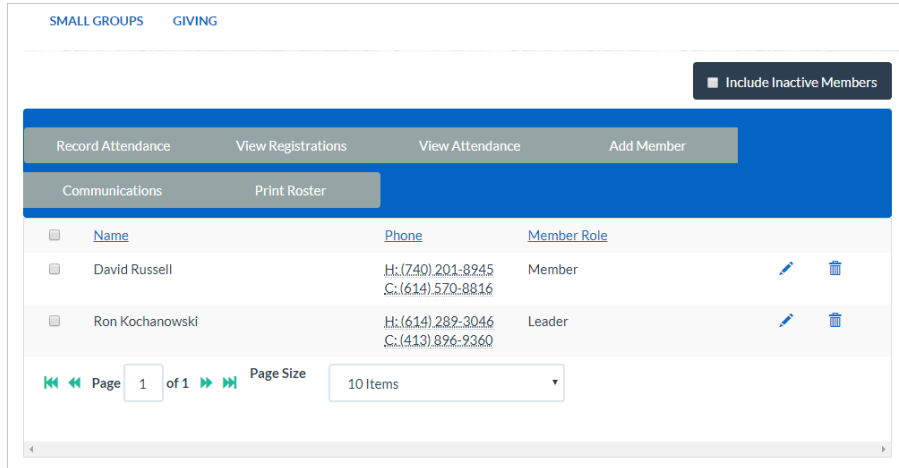
The plus sign to the left of the group name allows you to change the details of the group. Clicking on the name bar itself will allow you to interact with the group.



If any of the information needs to be updated, click the 'Edit Details' button, make the necessary changes, and be sure to save those changes when you're done. Please be sure to fill in as many details about your group as possible including if your group has a particular interest or affinity in the "Topic" category. If your group doesn't have a description to help people figure out if your group is a good fit, now would be a great time to add it!

Update Group Roster

Click on the name of your group, or click the 'View Group' button after you edit group details, you'll end up viewing a roster of those people currently listed as a part of your group. Looking at the action buttons, you have the ability to Record Attendance, View Registrations, View Attendance, Add Member, Communicate, or Print Roster.



The icon of the pencil to the right of each name allows you to edit that person's role in the group. Please be careful editing a person's name as this will affect their name in the church's overall database. If you designate someone a Leader, Assistant Leader, SG Coach, or Communications Person they will have access to edit your group details, roster, and attendance in this SG Leader Toolbox.

The icon of the trash can allows you to remove the person from the group. It does not delete them from the system.

Add Member

The screenshot shows a dialog box titled "Add A New Group Member". At the top, there are navigation links: "¿HABLAS ESPAÑOL?", "SERVICE TIMES", "VOLUNTEER", "SIGN OUT", and "HOME". The dialog contains a search input field with the text "Fred Flintstone" and a "Search" button. Below the search field, a search result is shown: "Yabba Dabba Doo Flintstone" with a blue plus sign to its right. At the bottom of the dialog are two buttons: "Add New Record" and "Cancel". Red arrows point to the search input field, the search result, and the plus sign.

To add a member to your group roster, click the “Add Member” button. In the search box, enter the name of the person you’re wanting to add. Click the ‘Search’ button. If the person is found, their name, beginning with their nick name, will display. Sometimes you might find that there are more than one person in the system with the same name. When this happens, all of the matching names will display and it’s up to you to verify that you have the correct one. You can verify by comparing their email, phone number, or address.

Clicking the ‘+’ to the right will add that person to the group.

There may be times when you can’t find the person that attends your group using the search mechanism. When this occurs, click the ‘Add New Record’ button.

The image shows a screenshot of a web application window titled "Add A New Record". The window contains a form with the following fields and controls:

- First Name:** A text input field with the placeholder text "First Name".
- Last Name:** A text input field with the placeholder text "Last Name".
- E-mail:** A text input field with the placeholder text "E-mail".
- Birthdate:** A date picker control with the placeholder text "Birthdate" and a calendar icon.
- Marital Status:** A dropdown menu with "Unknown" selected.
- Gender:** A dropdown menu.
- Street Address:** A text input field with the placeholder text "Street Address".
- City:** A text input field with the placeholder text "City".
- State:** A dropdown menu.
- Zip Code:** A text input field with the placeholder text "Zip Code".
- Country:** A dropdown menu.
- Home Phone:** A text input field with the placeholder text "Home Phone".
- Cell Phone:** A text input field with the placeholder text "Cell Phone".

At the bottom of the form, there are two buttons: a dark blue "Save" button and a light grey "Cancel" button.

We ask that you collect at least the first four items on the list, First Name, Last Name, Email and Birth Date. This helps us make sure people do not have duplicate records across the church., Please, make an attempt to collect as many of these details as possible as they help staff and leaders communicate within our community more effectively.

Record Attendance

The screenshot shows a 'Record Attendance' modal window. At the top, there's a 'Date / Time' field with the value '9/19/2018 9:02 AM'. Below this are two columns: 'Attendees' and 'Absentees'. Under 'Attendees', there is a button labeled 'David Russell'. Under 'Absentees', there is a button labeled 'Ron Kochanowski'. Below these columns is a 'Notes' section with a text area. At the bottom of the modal is a 'Notify' dropdown menu currently set to 'None'. 'Save' and 'Cancel' buttons are located at the very bottom of the modal.

To record attendance you can start on the roster page. Check the box at the left of each person that is present then click on 'Record Attendance'. It will then show all the people whose box was checked as 'Attendees'.

You can also click directly on the 'Record Attendance' button and individually click the names of those who are absent and they will be moved from the 'Attendees' to 'Absentees' list.

When recording attendance, use the starting time of your group as the date/time, no matter what time a person actually arrives. We consider that if a person was there at all, then they are present, whether they arrive late or leave early.

The 'Notes' sections adds notes for that meeting, not an individual. For example, you may make a note if it was a regular meeting, social event, or service activity. The 'Notify' option will probably not get used often, but allows for Leaders, or Leaders and Members to be notified of this particular attendance.

Again, be sure to click the 'Save' button when you're done making updates.

Track Attendance

Click the 'Track Attendance' button to see a record of all your previous meetings and who was present. There is also a percentage of how consistent someone has been in attending the group. This is a helpful way to show you who hasn't been to group in a while and remind you to check in on them to see if they need any care.

Communications

The Communications option allows you to send an email to the group or individuals. It works like the attendance feature where you can either click the box to the right of people's names in the roster or start by clicking the 'Communications' button. **Note: though there is an option to send an SMS/Text to the group, it is not currently functional.**

You must fill in the Subject before the email will be sent. The larger box below the subject is where you type the content of the email you're sending.

