

DIRECTIONS FOR STAFF/VOLUNTEER ROLE

HOW TO CREATE A GROUP

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Most Groups will fall under **Ministries**.
 - a) Click on Ministries to see which ministries already have groups.
 - b) Click on a Ministry to see what groups are created in that ministry.

Example: Clicking on Liturgy shows you groups for Altar Servers, Eucharistic Ministers, Hospitality Ministers, and Lectors.
- 4) **If the group you want does not exist already:**
 - a) Click on **Setup** in the top menu bar after you've clicked on Groups.
 - b) Select your group type (**Ministry**).
 - c) Select the **parent ministry** (Liturgical, SCC), then click **Create SubMinistry**.
 - d) Fill in the information:
 - i) **Category, Ministry Title, Description, Information** as provided to you
 - ii) **Website:** type in <http://www.examplechurch.org>
 - iii) **Info E-mail:** group leader's email address
 - iv) **Requirements, Training, Time Commitment** as provided to you (can be blank)
 - v) **Background Check:** Yes if ministry serves children/vulnerable adults
 - vi) **Sign Up Options:** Click on **Publish** and on **Display**
 - vii) **Default Sign Up Status: Interested.**
 - e) Then click **Add**.
- 5) Return to the Ministries page to find the group you just created and go to step 6.
- 6) **If the group you want exists**, click on the group you want to edit. The **Details** page comes up first.
 - a) Add the group leader by typing their last name in the **Group Leader** box and clicking **Add**.
 - b) Check the box next to the person's name and click **Add Leader**.Click **Save** on the Ministry details page when done.

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SAMPLE EMAIL RECEIVED BY GROUP LEADERS WHEN SOMEONE JOINS THE GROUP

From: Support@churchDB.com
Sent: Monday, August 20, 2007 4:37 PM
To: **Pope Paul VI**
Subject: Volunteer Confirmation Email for **Ministry: Saints: Martyrs of England and Wales**

The following person has been registered for 'Ministry: Saints: Martyrs of England and Wales' from ChurchDB.

Volunteer: **Fr. Ambrose Barlow**
Email address: **abarlow@examplechurch.org**

This is an automated email.

DO NOT REPLY TO THIS EMAIL.

If you have any questions regarding this information, please contact your Church Administrator. Be sure to list this email address in your address book to avoid having email from this group go into your spam folder.

SAMPLE EMAIL RECEIVED BY PARISHIONERS WHEN THEY JOIN A GROUP

From: Support@churchDB.com
Sent: Monday, August 20, 2007 4:37 PM
To: **Fr. Ambrose Barlow**
Subject: Automated Ministry Confirmation Email

This automated ministry confirmation email was sent to you by the ChurchDB system.

Your registration for the Group: **Ministry: Saints: Martyrs of England and Wales** has been recorded in ChurchDB.

This is an automated email.

Be sure to list this email address in your address book to avoid having email from this group go into your spam folder.

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HOW TO EDIT MEMBERSHIP TO A GROUP

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar
- 3) Select the Group you wish to manage.
 - a) If you are staff: find the group you want to edit under **Ministries** and click on it.
 - b) If you are a leader of the Group: click on **myGroups** on the top menu of the screen. Then click on the Group name.
- 4) In the gray menu bar at the top of the Group page click on **Members**.
- 5) To add a member, type in the Last and First Name of the person you want to add and click on **Lookup**.
- 6) On the results page, use the **check box** to choose the person you want to add to the group and click on **Add Members**. Once you click Add Members, the people selected are automatically saved to the Group.
- 7) To change a person's membership from Interested to Active, Active to Inactive, Delete them, etc., click the appropriate radio button beside their name and click **Save**. You may update and save one page of member names at a time.

HOW TO EDIT GROUP DETAILS (PUBLIC INFORMATION)

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar
- 3) Find the group you want to edit under Ministries and click on it.
- 4) In the gray menu bar of the Group page click on **Details**.
- 5) Edit/Complete any information applicable.
- 6) Click **Save** when done.

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EVENTS

Events lists any events in the Calendar which are tagged in the Calendar reservation as pertaining to that Group.

MEMBER REPORTS

Member Reports provides contact info report options. You can run PDF labels, which are shown in a predetermined size of 30 per 8.5x11 sheet, or create a CSV file which you can then download and manipulate in Excel.

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar
- 3) Find the group you want to edit under Ministries and click on it.
- 4) In the gray menu bar of the Group page click on **Member Reports**.
- 5) Click on Run **PDF Labels** to create mailing labels in a predetermined size of 30 per 8.5x11 sheet.
- 6) Click on **Run CSV Report** to generate a comma-delineated spreadsheet containing all member contact information. Download the file by clicking on the **blue link** on the ChurchDB page that appears after clicking the Run CSV Report button. Open the report in Excel or a similar program to manipulate data.

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HOW TO SET UP eGROUPs ADMIN

eGroups are created automatically when a Group is created once eGroups admin has been set up.

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **More** on the menu bar on the top of the screen.
- 4) Click on **eMail Setup**.
- 5) Enter email address that will be used to report any errors that might occur when processing eGroup emails.
- 6) Click on the **Save** button.
- 7) Click on **Create eGroups**. eGroups will be created for all existing Groups in Example Church (City) that have not been deleted or retired. Each member of an existing Group will become a member of the corresponding eGroup. A default eMail address, based on the Group's Name will be created for each eGroup. This default eMail address may be edited after eGroups have been created.
- 8) Click on **Create eGroups** button.

HOW TO SET UP eGROUP DEFAULTS

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **More** on the menu bar on the top of the screen.
- 4) Click on **Setup Defaults**.
- 5) Choose your default settings (see How to View/Adjust eGroup Settings).
- 6) Click on the **Save** button.

HOW TO SET UP SUPER POSTERS

Super Posters are individual email addresses that are allowed to post to **ANY** eGroups. These individuals are usually the Pastor, Communication Minister and/or designated Staff.

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **More** on the menu bar on the top of the screen.

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- 7) Click on **eGroup Super Posters**.
 - a) To **add** a new poster:
 - i) enter first and last name and email address. Note: The program looks at the email address not the name of the individual. If you have more than two emails (office and home) that you wish to send from enter both email addresses here.
 - ii) Click on the **Add** button.
 - b) To **edit** a poster:
 - i) Click on the **Edit** button.
 - ii) Update the fields as necessary.
 - iii) Click on the **Update** button.
 - c) To **delete** a poster
 - i) Click on the **Delete** button.
 - ii) The name and email address will be deleted.

HOW TO VIEW/ADJUST eGROUP SETTINGS

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **eGroups** on the menu bar on the top of the screen.
- 4) Find the Group you wish to adjust.
- 5) Click on **Details** in the grey menu bar.
 - a) To change the e-mail address for a group click on the yellow button to the right that says **Edit Email** and the box will open up. You can change everything in front of the @. The domain will always be @egroups.churchdb.com.
 - b) **eGroup Status: Active or Inactive.** Please leave all eGroups Active.
 - c) **Reply To:**
 - i) **eGroup** replies to everyone in the group.
 - ii) You probably want this to always say **Sender** so that someone can only respond to the person who sent the e-mail, which will more than likely always be the group leader. This prevents e-mail abuse.
 - d) **Enable Subject Modification:** If you check this box, whatever you type in the blank beside it will always be the first thing in the subject of every e-mail that goes to this

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group. For example you could put “Example Church Choir” to have every e-mail subject begin with Example Church Choir. If a group member has trouble with messages going to their spam folder, using this option will allow the member to set their own spam settings to prevent messages with the specified subject line from going to their spam folder.

e) **Allow Postings By:**

- i) The safest choice here is always **eGroup Leaders**, meaning only group leaders can send e-mails to the group.
- ii) **eGroup Members** means that everyone in the group can send e-mails. Only choose eGroup Members if you fully trust that no one in the group will abuse the e-mail list.

f) **Email Receipt:**

- i) Detail sends the person sending the e-mail a list of the number of e-mails sent, time of e-mails sent, and e-mail addresses that received the e-mail (recommended).
- ii) Summary sends the person sending the e-mail a shorter version of the above.
- iii) None

g) **Include Member Footer:** This option includes a list at the bottom of each e-mail of each member and their e-mail address. The default and safest choice is **No**.

h) **Include Unsubscribe Link:** This link takes the person receiving the e-mail to the eGroup page so they can opt out of receiving e-mails on their own without asking the group leader to do it.

HOW TO SEND AN E-MAIL TO AN eGROUP USING CHURCHDB

- 1) Open the ChurchDB log in page & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **eGroups** on the top menu bar.
- 4) Find your group.
- 5) Click on **Messages** in the gray menu bar.
- 6) Click on **Compose New Message**. Fill in your subject and message and click **Send**. This will be a text only message. An individual e-mail will be sent to each person in the group whose e-mail address is listed so that e-mails are less likely to be caught by spam filters.

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* If anyone does not receive the e-mail please ask them to set their spam filters to allow your e-mail address, support@churchdb.com, and bounce_handler@egroups.churchdb.com.

HOW TO SEND AN E-MAIL TO AN eGROUP FROM YOUR OWN E-MAIL INTERFACE (RECOMMENDED)

- 1) Open the ChurchDB log in page & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **eGroups** on the top menu bar.
- 4) Find your group.
- 5) Click on **Details** in the gray menu bar.
- 6) Note the **Group's e-mail address**. Use this in the To: box to send an e-mail from any e-mail client to the entire group just as you would send any other e-mail. Use only this email address! Do not add email addresses (including eGroup) in the To: CC: or BCC: You can send attachments and HTML formatted e-mail this way.

*When sending e-mails to groups through ChurchDB, expect messages to take up to 30 minutes to appear in someone's inbox. This is based on ChurchDB's server activity, the size of the message and/or attachments, and the response time of individual e-mail servers.

HOW TO ADD INDIVIDUALS AND EMAIL ADDRESSES OUTSIDE OF THE GROUP TO THE eGROUP

- 1) Open the ChurchDB log in page & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **eGroups** on the top menu bar.
- 4) Find your group.
- 5) Click on **Members** in the gray menu bar (default position).
- 6) Add Non-Group Members from the ChurchDB Population:
 - a) Enter full or partial name (Last, First) and click on **Lookup**.
 - b) Check in the box marked **Check to Join** and click on **Add Members**.
- 7) Add Outside Members (or additional Email Addresses)
 - a) Enter name (Last, First) and email address and click on **Add**.

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NOTES

When an email is sent to an eGroup, the server will look to see if that email is a valid 'poster'. Only email addresses designated as having permission to send emails to the eGroup will be allowed. Otherwise, an email will be sent to the poster stating that they do not have permission to send email to the eGroup.

HOW TO CREATE SPECIAL eGROUPS

- 1) Open the ChurchDB log in page & log in
- 2) Click on the **Groups** tab on the left hand menu bar.
- 3) Click on **More** on the top menu bar.
- 4) Click on **Create Special eGroup: Umbrella eGroup Comprised of Existing eGroups.**
 - a) Enter the name of the new eGroup you wish to create. After new Umbrella eGroup is created you can edit the name clicking on **Details** in the gray menu (found by clicking on the specific Umbrella eGroup name under **eGroups, Special**).
 - b) Click on each Active eGroup that you wish to combine and click on **Add**. Continue until you have all of the eGroups selected.
 - c) Click on **Save**.
- 5) Click on **Create Special eGroup: Demographic eGroup Based on Site Membership.**
 - a) Enter the name of the new eGroup you wish to create. After new eGroup is created you can edit the name clicking on **Details** in the gray menu (found by clicking on the specific Demographic eGroup name under **eGroups, Special**).
 - b) Choose the various filters for the group.
 - c) Click on **Save**.
- 6) To add posters to the eGroup
 - a) Open the ChurchDB log in page & log in
 - b) Click on the **Groups** tab on the left hand menu bar.
 - c) Click on **eGroups** on the top menu bar.
 - d) Find your group.
 - e) Click on **Posters** in the gray menu bar (default position).

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- f) Add Non-Group Members from the ChurchDB Population:
 - i) Enter full/partial first and last name and click on **Lookup** button.
 - ii) Check in the box marked **Check to Join** and click on **Add Members**.
- g) Add Outside Members (or additional Email Addresses):
 - i) Enter name (Last, First) and email address and click on **Add**.