

New York Conference Church Dashboard

User Guide

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Church Dashboard Introduction

The church dashboard is a web-based program developed by Brick River Technologies that allows churches to update leadership and church information. The leadership updates take the place of the previous online Charge Conference Summary Form; the church information updates what appears in the “Church Locator” on the conference web site.

The dashboard gives churches the opportunity to add leaders and update contact information directly into the conference database, allowing the conference and district offices the ability to directly communicate important information pertinent to your church leaders based on their leadership position.

The pages that follow take you through a step-by-step process on how to use the church dashboard. If there are questions regarding the church dashboard that are not answered in this document, please contact Barbara Eastman (website@nyac.com) in the conference office.

Logging In

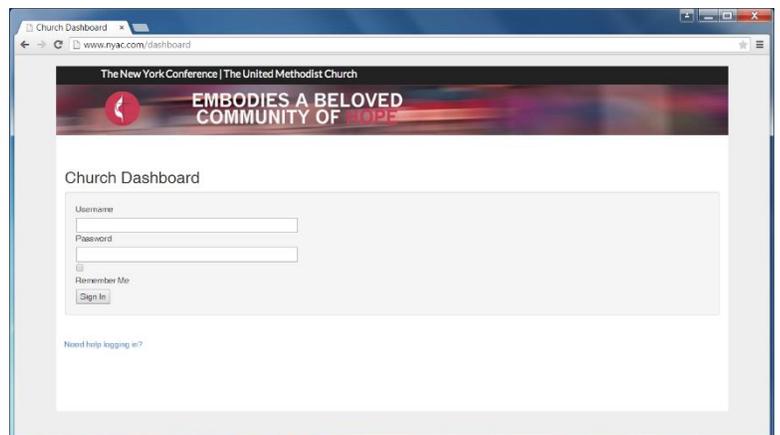
The log-in screen for the dashboard is located here:

<http://www.nyac.com/dashboard>

Use your church GCFA number without the first zero as both your username and password.

If you don't know your GCFA number, it can be found in the statistical section of the Journal (column 1):

<http://www.nyac.com/files/journal/nyac-2014-journal-section-14.pdf>



Church Dashboard Home Page

The church dashboard home page has navigational links that will take you to each section of the dashboard. This manual covers each of the sections. The sections are as follows:

Contacts (People Associated with Your Church)
Leaders (Contacts with Leadership Positions/ Assignments within Your Church)
Charge Conference Leadership Report (printable)
Church Information
Login Information
Log-out

Charge Conference Reporting Process

The process for adding your church contacts and their leadership positions (assignments) has been simplified. You do this in two simple steps (detailed below):

1. Add and edit contacts (in the Contacts section)
2. Add and edit those contacts' assignments (in the Leaders section)

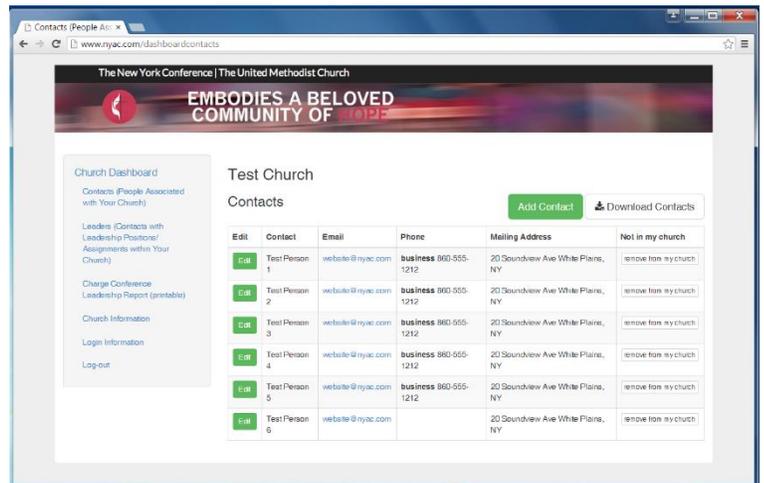
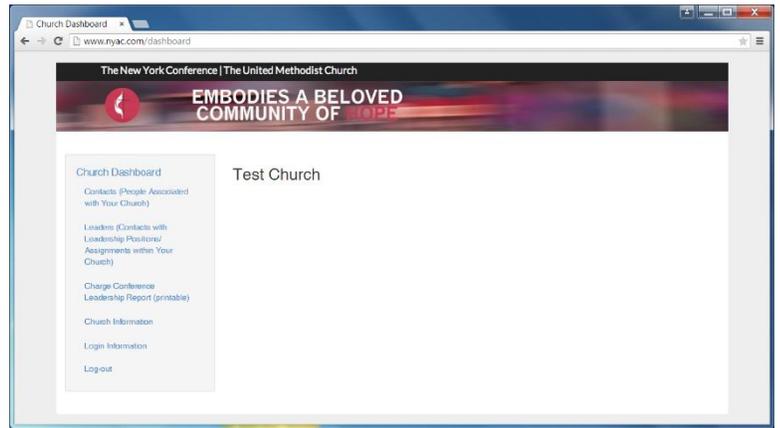
Adding and Editing Contacts

In order to assign a person to a leadership position, they first need to be in the database with their correct contact information.

Click **Contacts** in the left navigation.

Review the list of contacts to determine if anyone needs to be added, or if their information needs to be updated.

Please note: Although you can add a **clergy person** to a leadership position, **you cannot change any of their contact information**. If their contact information is incorrect, notify Barbara Eastman at website@nyac.com. This way, we can update all of our systems in the conference office.



Adding a contact

If the contact is not currently in the database, you won't see them on the Contacts page, but you can easily add them.

Search for a contact

To add a new person, click the green **Add Contact** (see above).

Before you add a contact, the system will have you check to see if that person already exists in the database.

Enter the person's last name and click **Search**.

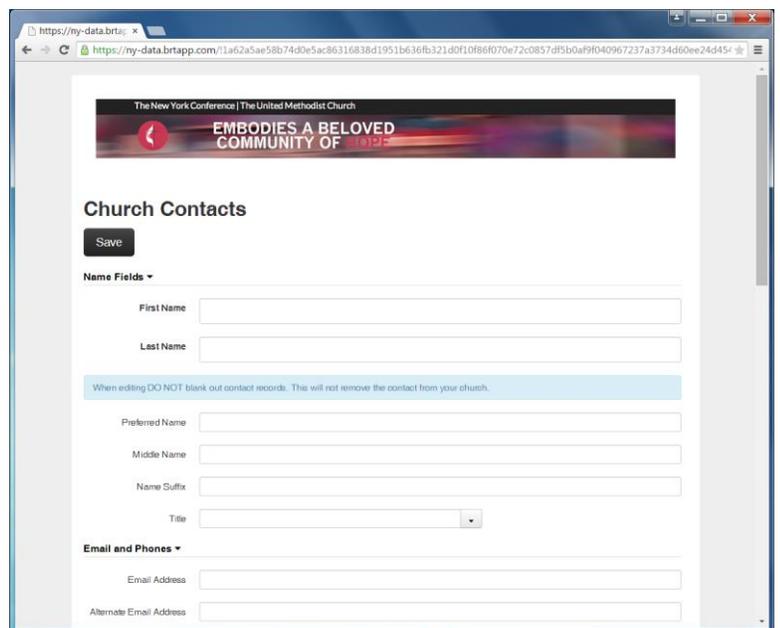
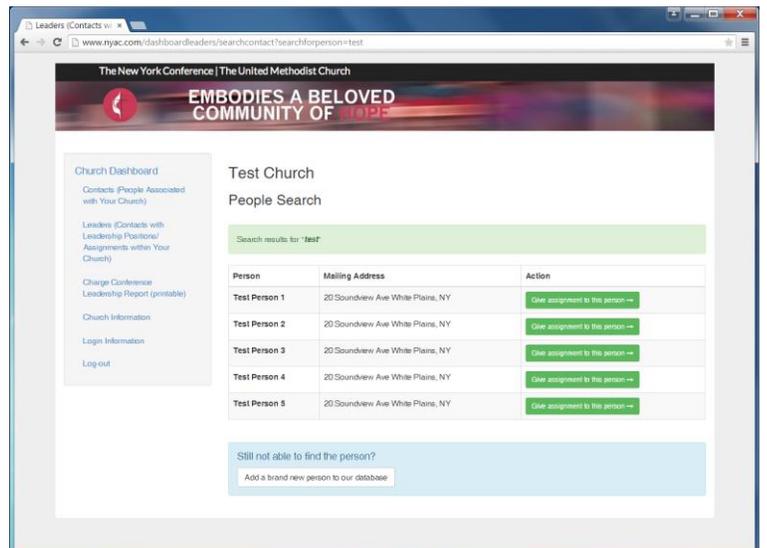
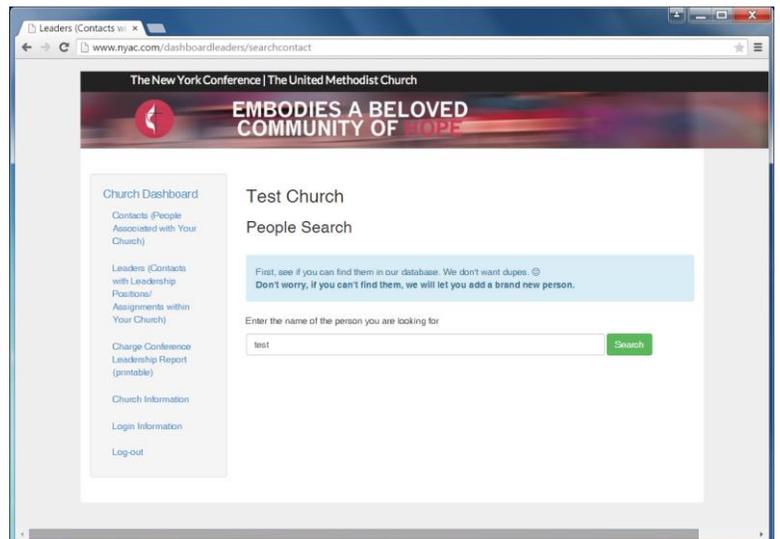
In the example above, the name "test" was entered. The screen shows that there are five Test Persons in our conference database. If one of these is the person you were looking for, then they are already in the database. Go back to the Contacts page and move on to your next contact. You will search for the person again when you are ready to complete Step 2: Add and edit those contacts' assignments (in the Leaders section). When you assign a leadership position to them, they will automatically be placed into your church's Contacts list.

If the person you were looking for did not come up, click **Add a brand new person to our database**.

Fill in as much information as you can about this person. Most important are email and mailing addresses. Please do not use the **Clergy** section of this form.

When adding contact information, please use upper and lower case letters (NOT ALL CAPS); for addresses please use abbreviations with no punctuation, e.g. St, Ave, Hwy; phone numbers should be entered in the following format xxx-xxx-xxxx. It is very important that you **do not** put words in the phone number field such as "call first" or "ext. 123."

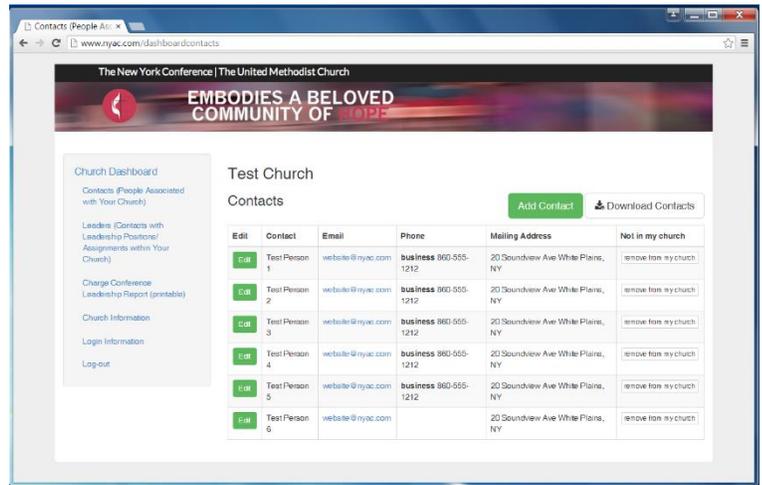
Remember to click **Save** when you are finished, and click **Return to church contacts** in the next screen. This new person will now appear on your contact list.



Edit existing contacts

Click the green **Edit contact info** button to the left of a person's name to verify/update mailing address, email address, phone number, etc. Make any necessary changes (**DO NOT USE ALL CAPS**) and click **Save**.

After each person you save, click **Return to church contacts** in the next screen.



Removing contacts from your church

If a person is in the Contacts area for your church, and they should no longer be listed (moved, transferred, died, etc.), click the link **remove from my church**. This will not delete them from our database, it will “unlink” them from your church.

Church Leaders/Assignments

This area allows you to input your church leadership assignments into the conference database so that the conference and district offices can contact your leaders with important information about their ministry. The dashboard will also allow churches to print lists and download contact information for their leaders. This printable list takes the place of the Charge Conference Summary Form – you will need to print this out for your district superintendent and bring to your Charge Conference.

Although this is called the Charge Conference Leadership Report, each Contact should be listed with their primary church. These leadership positions are assigned on a church basis. For charges/parishes with shared committees such as Staff-Pastor/Parish Relations Committee, **list each person in their primary church only; do not add them to each church in the charge/parish.**

The leadership assignments we would like you to provide are listed here; those that are required are indicated with an asterisk*

Board of Trustees – Church	Lay Member of Conference – Church*
Board of Trustees Chair – Church*	Local Lay Servant (formerly Lay Speaker) - Church
Camping & Outdoor Ministry Coordinator - Church	Missions/Outreach Chair - Church
Candidate for Ministry - Church	Native American Ministries Representative - Church
Certified Lay Servant (formerly Lay Speaker) - Church	Nurture - Church
Children's Choir Leader - Church	Organist - Church
Choir Director - Church	Praise Band Leader - Church
Church Secretary/Admin Ass't - Church	Reserve Lay Member of Conference - Church
Church/Admin. Council Chair – Church*	Safe Sanctuaries Coordinator - Church
Communications Chair - Church	Staff/Pastor-Parish Relations Chair – Church*
Council on Ministries Chair or equivalent - Church	Staff/Pastor-Parish Relations Committee - Church
Education/Church School - Church	Stewardship Chair - Church
Education/Church School Superintendent - Church	Treasurer – Church*
Evangelism Chair - Church	United Methodist Men President - Church
Finance Chair – Church*	United Methodist Women President - Church
Finance Committee - Church	Worship Committee Chair - Church
Lay Leader – Church	Young Adult Contact - Church
	Youth Contact – Church

Suggestion: You can print a list of all current leadership assignments for review prior to editing and adding assignments for the year. Click the **Charge Conference Leadership Report (printable)** and print that page.

Click **Church Leaders** in the left navigation and this page will display.

In this area, you can enter/edit all of your church's leadership assignments.

Edit existing assignment

The assignments previously provided to the conference via the Charge Conference Summary Form will appear here.

To close an existing assignment (**changing the end date is the only change that gets made when editing an existing assignment**), click the green **Edit Assignment** button.

This screen will appear.

Whether the person has been re-elected to the same position or not, **all you need to change on this screen is the end date**. If you leave it blank, they will continue in this position. If you change it to 12/31/2016, for example, this person will continue in that assignment position in our database until that date.

The screenshot shows the 'Church Dashboard' for 'Test Church' on the 'Leaders' page. A yellow box lists required positions: Board of Trustees Chair - Church, Church/Adm. Council Chair - Church, Finance Chair - Church, Lay Member of Conference - Church, Staff/Pastor-Parish Relations Chair - Church, and Treasurer - Church. Below this is a table of current assignments:

Action	Assignment (View required positions)	Person	Start Date	End Date	Class
Edit Assignment	Council on Ministries Chair or equivalent - Church	Test Person 1	04/13/2015		
Edit Assignment	Evangelism Chair - Church	Test Person 2	04/13/2015		

Below the table, a 'Required Positions' section lists the same six positions as the yellow box.

The screenshot shows the 'Church Leaders' edit form. It includes a 'Save' button at the top left. The 'Assignment Dates' section has fields for 'Start' (4/13/2015), 'End', and 'Class of'. The 'Position and Levels' section has a 'Position' dropdown menu set to 'Council on Ministries Chair or equivalent - Church', an 'Area of Responsibility' field, and a 'Notes' text area. A 'Save' button is at the bottom left.

To end (close) this assignment; change the end date to today's date (or the day when they stopped serving in this position).

If the person has been elected to a different leadership assignment, put an end date on this record and click **Save**. **DO NOT select a different leadership assignment. You must close out the old assignment and begin a new one – this helps us keep an historical record of the leadership positions.**

After you click **Save**, click **Return to Church Leaders**.

Church Leaders

Save

Assignment Dates

Start: 4/13/2015

End:

Class of:

To remove a person from an assignment, give them an end date. Don't blank out their position.

Position and Levels

Position: Council on Ministries Chair or equivalent - Church

Area of Responsibility:

Notes:

Save

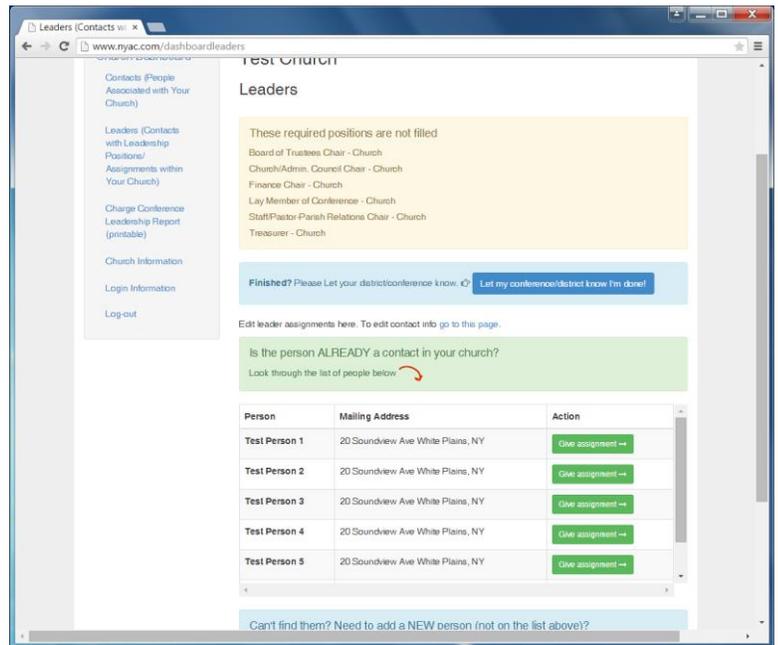
- Board of Trustees - Church
- Board of Trustees Chair - Church
- Camping & Outdoor Ministry Coordinator - Church
- Candidate for Ministry
- Certified Lay Servant - Formerly Lay Servant - Church
- Children's Church - Church
- Choir Director - Church
- Church Secretary/Admin Assistant - Church
- Church/Adm. Council Chair - Church
- Communications - Church
- Council on Ministries - Church
- Education/Church School - Church
- Education/Church School Superintendent - Church
- Evangelism Chair - Church

Add new assignment

Since you have already added all of your contacts to the database (go back to the [Contacts](#) section of this manual if you have not), adding their leadership assignments is quick and easy.

On the Leaders page, click the **Add New Assignment** button, and this page will appear.

If a contact is elected to a *new* assignment position, click **Give Assignment** next to the person's name.



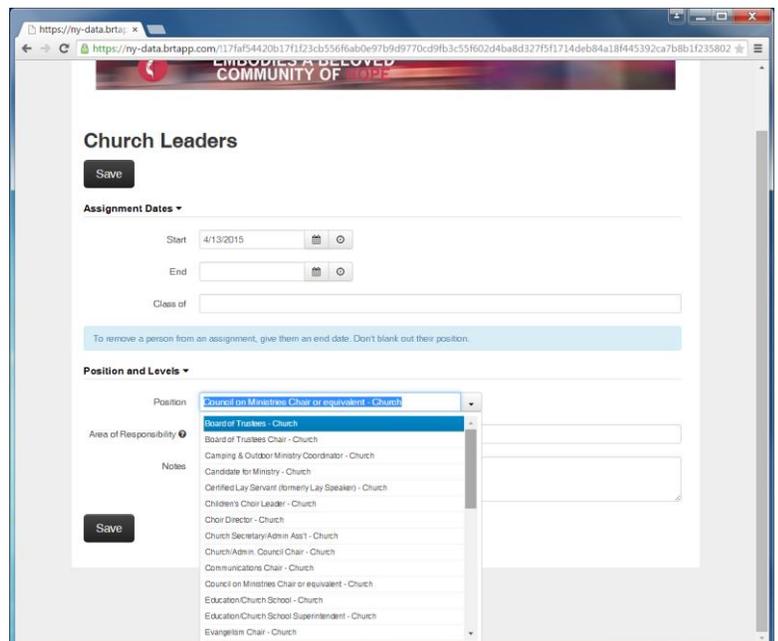
Fill in the information about their leadership assignment in this screen.

Choose the start date of the assignment (can be today).

Choose the end date of the assignment if this leadership assignment is part of a class, i.e. for the Board of Trustees and the Staff/Pastor Parish Relations Committees. These class assignments are typically listed for the current year and two years in the future. So, a person in the Class of 2017 would be given an end date of 12/31/2017 and 2017 gets typed into the **Class of** field.

Then click the dropdown box and select the assignment **Position**. Click **Save**.

Click **Return to Church Leaders**



Add new assignment – contact not on list

To add a new assignment to someone not yet on your contacts list, click the **Leaders** link in the left navigation, then click the **Add New Assignment** button. If they are listed on the page, click the green **Give Assignment** button next to their name.

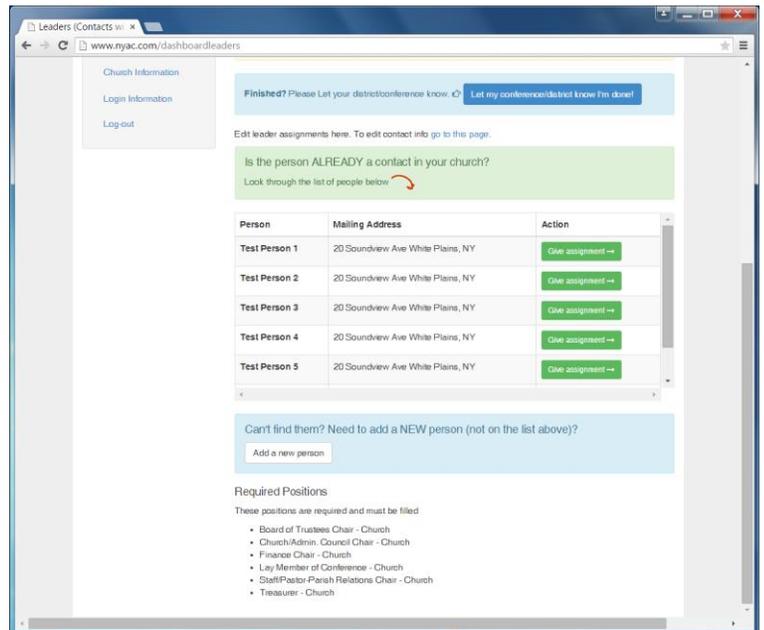
If they aren't listed on this page, you can search for them.

Search for them in our database using the [search process above](#) (start by clicking **Add a new person** in this screen).

If the person you are looking for appears in the search results, click **Give assignment to this person**. This will automatically add this person to your Contacts list; you will see them there next time you go back to your **Contacts**. If the person you are looking for doesn't appear in the search results, click **Add a brand new person to our database** ([see this process above](#))

Continue editing/adding assignments until all the leadership assignments have been entered for the year.

When you are finished, click **Leaders**. This page will show you any required leadership positions that you may have missed. If you are completely finished, please click the big blue button, **Let my conference/district know I'm done!**

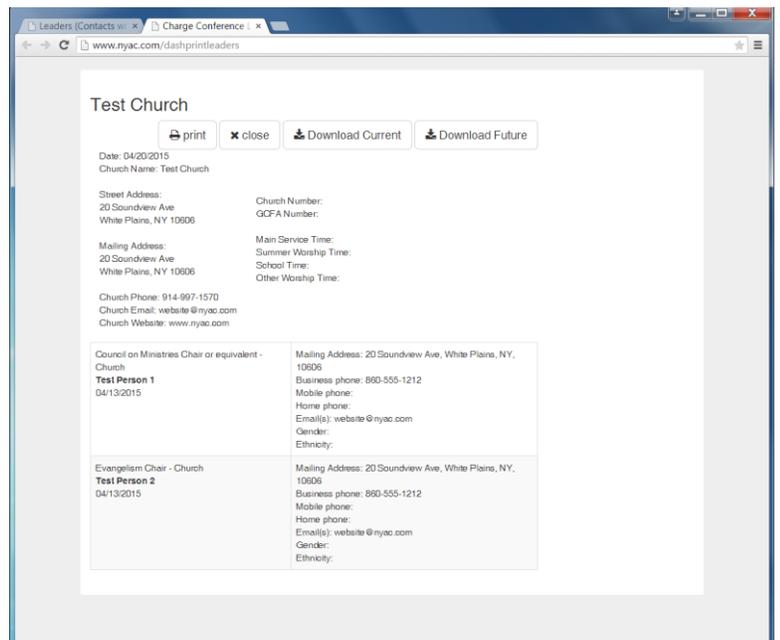


Church Leaders (Printable)

This is the report that you will bring to your Charge Conference to provide the list of your church leaders to your district superintendent.

When you click this link, you can choose to print the list as it's displayed.

You can also download the list of current assignments or future assignments. These will download a .csv file which can be saved in Excel.



Church Information

This area allows you to update the information for your church on the “Church Locator” page on the conference web site and in our master database. Soon, this data will also be shared with GCFA to update the church information in the umc.org “Find a Church” functionality.

Although we have many charges and parishes, each church is listed individually on the www.nyac.com Church Locator. The church information must be updated for each church.

Click the **Church Information** link and the screen will display the information we currently have in the database for your church.

Click the green **Update** button to make changes in any of the displayed fields. Changes cannot be made to the Physical Address – those must be sent to Barbara Eastman at website@nyac.com.

To upload a Primary Image (current picture of your church that will appear in the Church Locator), click the **Browse** button and navigate to the picture located on your computer. Click the file name to highlight it and then click **Open**. This will upload your picture to the web site.

When making changes to the contact information for your church, please use upper and lower case letters (NOT ALL CAPS); for addresses please use abbreviations with no punctuation, e.g. St, Ave, Hwy; phone numbers should be entered in the following format xxx-xxx-xxxx. It is very important that you **do not** put words in the phone number field such as “call first” or “ext. 123.”

Please note: When entering the address for your church, be sure to put the mailing address for your church in the appropriate fields. The physical address can only be changed by the conference – please email Barbara Eastman at website@nyac.com with any physical address changes.

When you have finished updating the information for your church, click the **Save** button at the bottom of the screen. To work on other areas of the dashboard, click **Return to Church Dashboard**.

The screenshot shows a web browser window with the URL www.nyac.com/dashboardchurch. The page header includes the logo and the text "The New York Conference | The United Methodist Church" and "EMBODIES A BELOVED COMMUNITY OF PEOPLE". On the left is a "Church Dashboard" menu with links like "Contacts (People Associated with Your Church)", "Leaders (Contacts with Leadership Positions/Assignments within Your Church)", "Change Conference Leadership Report (printable)", "Church Information", "Login Information", and "Logout". The main content area is titled "Test Church" and "Church Information". It features a "Primary Image" field with a photo of a church building and a green "Update" button. Below the image is a table of church details:

Church SHORT Name	Test Church
Church FULL Name	Test Church
Email Address	website@nyac.com
Alternate Email Address	
Business Phone	914-997-1570
Mobile Phone	
Home Phone	
Church Fax	
Mailing Address 1	20 Soundview Ave

The screenshot shows a web browser window with the URL <https://my-data.brta.com/791ac7c1c484476712a5a453123951947ba68afe61d9127d2c0773326d13ca087eaf13941f0f6ce9e9f567348b7663>. The page header is the same as the previous screenshot. The main content area is titled "Church Information" and has a "Save" button. Below the "Primary Image" field, there is a "Browse" button and a list of files, including "esbury_milverton.jpg". The form fields are as follows:

Name Fields

Church SHORT Name: Test Church
Church FULL Name: Test Church

Email and Phones

Email Address: website@nyac.com
Alternate Email Address:
Business Phone: 914-997-1570
Mobile Phone:
Home Phone:
Church Fax:

Mailing Address

Address 1: 20 Soundview Ave
Address 2:
City: White Plains
State: New York (NY)
Zip: 10606
Country: United States of America (USA)

Physical Address

Address 1: 20 Soundview Ave
Address 2:
City: White Plains
State: New York
Zip: 10606
Country: United States of America

County

About ▾

Church Website URL:

Worship Times ▾

Main Service Time

Summer Service Time

Other Worship Time

School Time

Location and Other Information ▾

Handicap Access

Driving Directions

Facility

Attributes/Disaster Tag:

Parsonage Information ▾

Parsonage Phone

Parsonage Address 1

Parsonage Address 2

Parsonage City

Parsonage State

Parsonage Zip

Parsonage Tags

NY Conference Fields ▾

Council Meeting Date

Time

Public Transportation

Parking Capacity

Hall Capacity

Sanctuary Capacity

Conference Relationships ▾

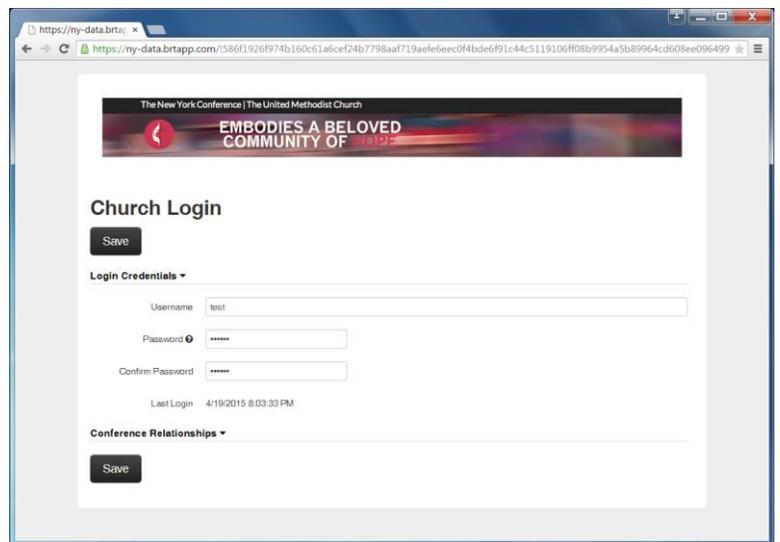
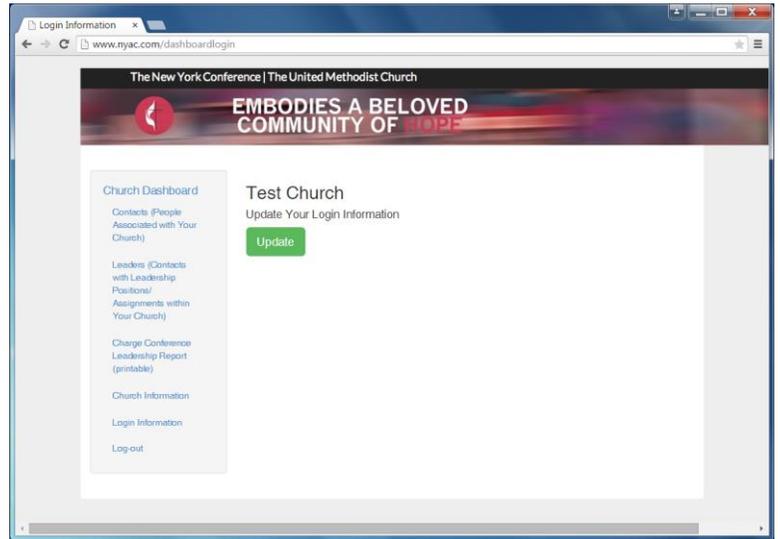
Church Login Information

This area is used to change the login information for your church. (This login is for the church, not an individual.) If more than one person at your church accesses this program, you will need to inform them of any changes you make.

Click the **Update** button, and the following screen will appear.

Enter the new username that you want to use, enter the new password and then re-type the new password to confirm it. Click **Save**. Put this information in a safe place.

Please DO NOT add anyone in the “Conference Relationships” drop-down.



Log Out

After you are finished working in the dashboard, click **Log-out** in the left navigation. You will be returned to the homepage of our conference web site.

Updated: August 27, 2015