USER MANUAL

UPDATED: DECEMBER 30, 2005

“Cutting-Edge Web-based Church
Membership & Website Management Software”

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Chapter 1: Getting Started

"What's Your Ministry: People or Computers?"

Network servers. Backup tapes. Upgrade installations. Hardware maintenance. Troubleshooting. Security. Your favorite ministry tasks, right?

Didn't think so. That's why more experts are recommending web-based software. On November 1, 2005, Bill Gates proclaimed that we are in the **"Live"** era where software is *delivered via the web* and *your data is always online*. What makes web-based software so attractive is its **convenience.** The days of carrying around your files on floppies or USB drives are over. With web-based software, your data is available online, anytime and anywhere. Plus, "live" software requires zero installation. All you need is a web browser and an Internet connection. In a word: **easy!**

"Why Choose Ascribe?"

- **Freedom from IT headaches** – we do backups, upgrades and everything else while you sleep
- **Work from anywhere** – if you have an Internet connection, you can use it
- **Staff and volunteers will love it** – flexible and easy-to-use
- **Save money** – pay as you use it (no big software license or upgrade fees)
- **Enthusiastic service** – we offer unlimited email support, and we answer fast

What is Ascribe?

Ascribe is an advanced web-based system for church which not only provides typical member management functions, but also handles website publishing as well.

What distinguishes Ascribe from traditional church management software is that Ascribe does not need to be installed on each user's personal computer. Each person using Ascribe simply requires a computer with Internet access, a web browser and a user account.

One of the best things about Ascribe is that it is extremely simple for a newcomer to use, but offers many advanced features for a professional user.

What Can Ascribe do?

Ascribe's two main feature sets are (1) member management and (2) website management. Here is a sampling of what you can do with Ascribe.

Member Management

- Track data for persons, households and organizations
- Print mailing labels and mail-merged letters
- Keep prayer requests and print weekly reports for your prayer team
- Maintain a database of ministry teams and small groups
- Manage the discipleship progress of every person in the church
- Send personalized HTML emails to your church members
- Record each member's financial contributions and print tax-deductible giving statements. Integrates with Intuit Quickbooks.

Website Management

- Manage unlimited web pages for your church website using our easy-to-use Web Page Editor, which works just like a word processor
- Publish an online photo gallery
- Publish news articles or blogs
- Maintain an events calendar and announcement page on your website
- Publish an up-to-date Frequently Asked Questions page
- Create a secured member's area on your website which requires a username and password to enter
- Customize the *look and feel* of your website by with fonts, templates and graphics

Chapter 2: Getting Around Ascribe

The Ascribe system has been designed to make it easy for you to use with as little time needed as necessary to complete your tasks. You can perform similar tasks in the same way for all modules within the application. Sorting, searching, exporting, moving from record to record ... all work the same way across modules.

Begin by familiarizing yourself with the modules available to you by examining the orange menu bar.

Start Page

Upon logging into the intranet, the user is shown the intranet portal. Here the user is presented with a number of blocks showing information from within Ascribe. For example, one block could be listing the latest announcements targeted for staff and volunteers. Another block could list the top five favorites of the user. The portal can be configured according to the users tastes. Blocks can be added and removed. Blocks can be rearranged to on the page. These settings saved and will remain just as it was set the next time he/she logs into Ascribe.

Get Help

Click on the **Help** icon in the upper right hand corner of the screen at any time to launch the Ascribe help manual.

Sorting

Every listing of records can be sorted by various fields. Look for the or icons next to a column header within a spreadsheet of records. You may click any clickable column header to sort records by that column. For example, in the **listing of persons**, there you may sort person records either by **Name, Household** or **Address** . Clicking the column header for a spreadsheet already sorted by that column will then resort the spreadsheet in the opposite order.

Paging through records

Ascribe lists records in a spreadsheet-like table. Usually not all records in the database can be displayed on a single page. Therefore, Ascribe shows only a limited number of records per page. You can page through them by selecting a range of records in the drop down listbox or use the following navigational buttons.

go to the first page
go to the previous page
go to the next page
go to the last page

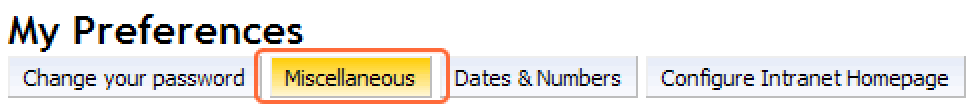
The drop down range selector allows you to jump to as many as five pages before the current page or five pages after the current page. For most record listings, the drop down range selector and the paging buttons are found at the top and bottom of the spreadsheet table.

Change number of records shown per page

1. In a list of records, look for this in the upper right corner: Show 15 per page
2. Edit the number shown to reflect the number of records you would like displayed per page.
3. Click the graphic button or press the *Enter* key.

Change default number of records throughout Ascribe

1. Go to the **My Ascribe Preferences** page by clicking on the link at the top of every screen which looks like this: My Preferences
2. Click on the **Miscellaneous** button.



3. Set the **Records Per Page** field to the number of records you wish to be shown in lists of records throughout Ascribe. This will affect your account only.
4. Click the Save Preferences button at the bottom of the form.

Moving from record to record

When viewing a record in Ascribe, just below the header, to the right side, you will often see the following buttons which allow you to move to another record or back to a listing of records:

go to the *previous* record
go to the *next* record
go to a *listing* of records

Logout

It is important for you to logout after each time you use Ascribe for security reasons. If you were to remain logged in and walk away from you desk, some one could very easily go in and view information he or she shouldn't, or create/edit/delete information with your username.

To logout, click on the Logout link at the top of every screen.

Auto Logout

While you are using Ascribe, it will keep track of how long you have left a page open. If you exceed the maximum time allotted, the system will automatically log you out. It will flash a popup screen warning alerting you that you will soon be logged out.

For this reason, if you have a form open and have entered information into it, make sure you have saved the information before leaving your computer. If you are automatically logged out, the information in the form will be lost.

Change your password

1. Go to the My Ascribe Preferences page by clicking on the link at the top of every screen which looks like this: My Preferences

2. Enter your new password twice for verification. Your password must be at least 5 characters long.

3. Click the Change Password button.

Tips for creating strong passwords:

- Use passwords with seven characters or longer. Ascribe can accommodate passwords of up to 32 characters
- Include upper and lower case letters, numerals, symbols.
- Has at least one symbol character in the second through sixth position
- Has at least four different characters in your password (no repeats)
- Looks like a sequence of random letters and numbers

Password Don'ts:

- Don’t use ANY PART of your logon name for your password
- Don’t use any actual word or name in ANY language
- Don’t use numbers in place of similar letters
- Don’t reuse any portion of your old password
- Don’t use consecutive letters or numbers like “abcdefg” or “234567”
- Don’t use adjacent keys on your keyboard like “qwerty”

Keyboard shortcuts

Once you are in one of the modules, you may often find shortcuts that make your work faster and easier if you like keyboard shortcuts. Look for the underlined letters and usually, you can use ALT and the letter to use the link.

For example, let's say you are on a data entry form. Look to see if a field name has an underlined letter. If so, press ALT and the letter at the same time to jump directly to that field without having to use your mouse. If you are on a page that lists data, you can position your cursor in the search box by using ALT-S. You may also use the TAB key to go from one field to the next.
For keyboard shortcuts that take you to another page, use ALT and the letter and then press ENTER. For example, on those data listing pages, you may advance to the next page by using ALT-N and then hitting ENTER. If you are viewing a record and want to edit it, you may use ALT-E and then ENTER. That will take you to the form.

Once you've mastered the keyboard shortcuts, you'll find that you can save a lot of time by using them when compared to only using the mouse.

Some other very helpful shortcuts offered by the browser are:

- ALT - left arrow: go back a page
- ALT - right arrow: go forward a page

Also any popup windows generated by Ascribe can be closed by simply pressing the ESC button.

Adjusting hierarchical placement

Several modules within Ascribe organize data hierarchically, that is in a tree structure, much like an outline or a table of contents. These modules are **Groups, Web Pages, Discipleship Goals** and **Neighborhoods.**

Placing a new record into the hierarchy

When creating a new record for a module which organizes records hierarchically, you will be asked to place the record within the tree structure before entering the contents of the record. Once the record is in place, you can adjust its placement within the hierarchy by clicking on the **Adjust Hierarchical Placement** button in that record's row of function buttons.

Reassign primary parent

1. Click on the **Adjust Hierarchical Placement** button for a record of a module which organizes records hierarchically (e.g., groups, web pages, discipleship goals).

2. In the table of hierarchical relationships between this record and other records, locate the **Primary Parent** relationship. Click on the **Reassign** button.

3. Click the **Reassign as primary parent** button for the new primary parent.

4. Click **Finished** to return to the **Adjust Hierarchical Placement** page for the record.

What is a secondary parent?

Some modules that organize records hierarchically allow for secondary parent relationships. While every record must have a primary parent, secondary parents are optional. When a secondary parent relationship is established, then the record will appear under the secondary parent(s) as well as under the primary parent.

Add secondary parent

1. Click on the **Adjust Hierarchical Placement** button for a record of a module which organizes records hierarchically (e.g., groups, web pages, discipleship goals).
2. Under **Additional Functions,** click **Add Secondary Parent** .
3. Click the **Select as secondary parent** button for the desired secondary parent.

Fixing the tree

Some times after adjusting the hierarchical placement of records, the tree gets out of alignment. If this happens, a user with the *Administrator* permission may click the **Fix Tree** button to correct the problem.

Adobe Acrobat (PDF) Reports

Ascribe generates PDF documents for reports such as mailing labels, mail merged letters, contribution batch deposit summaries, tax-deductible giving statements and other reports. These reports were generated in the PDF format to specify exact printing dimensions. In order to view and print PDF documents you must download and install the **Adobe Acrobat Reader**. Most likely you already have the free *Adobe Acrobat Reader* installed on your computer. If not, visit the following website to download the free reader: http://www.adobe.com/products/acrobat/readstep2.html.

Chapter 3: Persons

Person records are the basic building block of the Ascribe church membership database. Here are some of the fields available for each person:

- name and nickname
- multiple phone numbers
- multiple addresses
- email address
- birthday
- marital status
- member status
- educational level
- school
- high school class year
- unlimited photographs
- and other demographic information

Finding the module

To get to the person module, on the main menu (i.e., the orange bar at the top of every screen), click on **Persons.**

Understanding the person listing

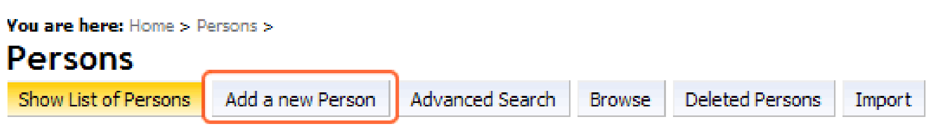
When you first arrive at the person module, Ascribe will present you with a listing of all the persons within the database (if any exist). At the top of this listing of persons, you will see a the following functions. These allow you to quickly (1) do a person search, (2) export data from the person module, (3) navigate from one page of persons to the next and (4) change the number people listed per page.

Below this will be a listing of persons. The following is a sample of a person row:

- **Photo.** If a person has a picture on-file in Ascribe, a small thumbnail of their photo will show on the left hand side to allow you to quickly scan down a list of people for the person you are looking for.
- **Name.** In the second column will be his name. *Clicking on his name will take you to his person record.*
- **Household.** In the third column will be his household name and role in the household. *You may click on the household name to view his household record.*
- **Address and Contact Info.** The next two columns display his address and contact info. Clicking on the icon next to an address will open a new browser window to attempt to map this address on YAHOO! LOCAL Maps. Clicking on the icon next to a phone number will open a new browser window to research this phone number on Google. This may be useful to attempt to find out more information about a person based on their phone number (such as finding an address attached to a phone number). If a person has an email address, you may click the email address to write an email to the person using your computer's normal email program.
- **Electronic business card**. Click on the icon to download an electronic business card (i.e., a vCard file) which can be imported into your personal information manager (PIM) program's address book. You may have a PIM (such as Microsoft Outlook) already installed on your computer which can import these electronic business cards.
- **View.** Click on the icon to view this person's record.
- **Edit.** Click on the icon to edit this person's record.
- **Delete.** Click on the icon to delete this person's record. For most modules within Ascribe, when you click on this icon Ascribe will ask you to confirm whether you really want to delete the record. However Ascribe will not do so when deleting person records. Instead, the record is put into the **Deleted Persons** folder.

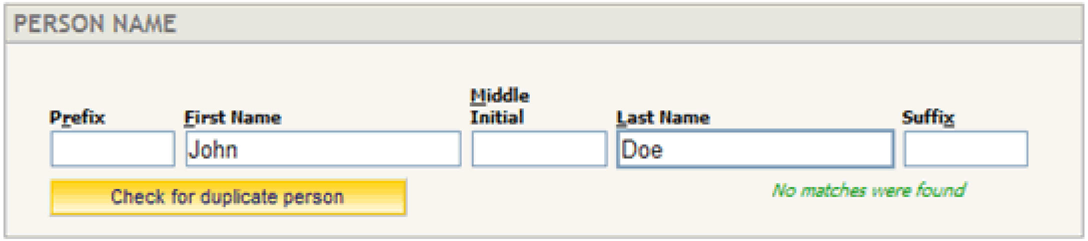
Create a person record

1. In the person module, click the **Add a new Person** button.



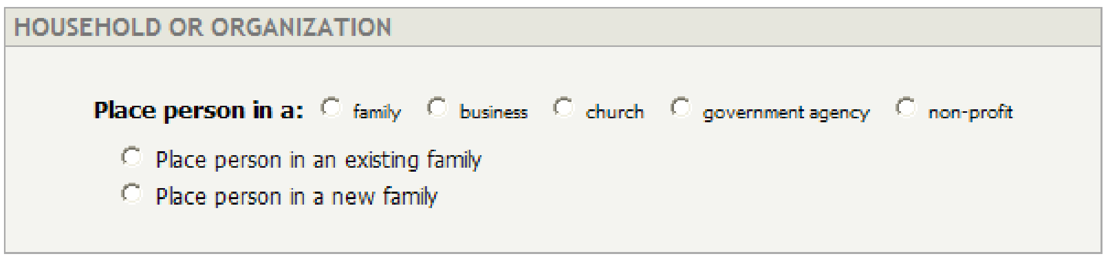
2. Fill in the person's name and then click the **Check for duplicate person** button. If no pre-existing person of the same name is found, Ascribe will report that *"No matches were found"* and display the household section.

   Keyboard shortcut tip: *When the form loads up, use ALT-F on your keyboard to position cursor in the First Name field.*

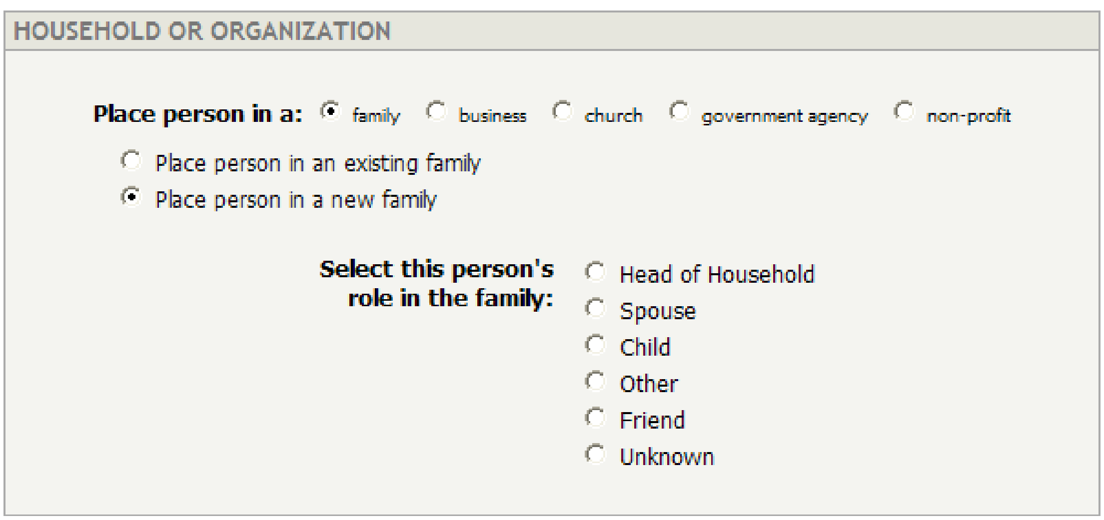


If a duplicate was found, Ascribe will ask you if you want to edit the *matched person* or create a new person record. This innovative feature of Ascribe prevents the common database problem of duplicate records.

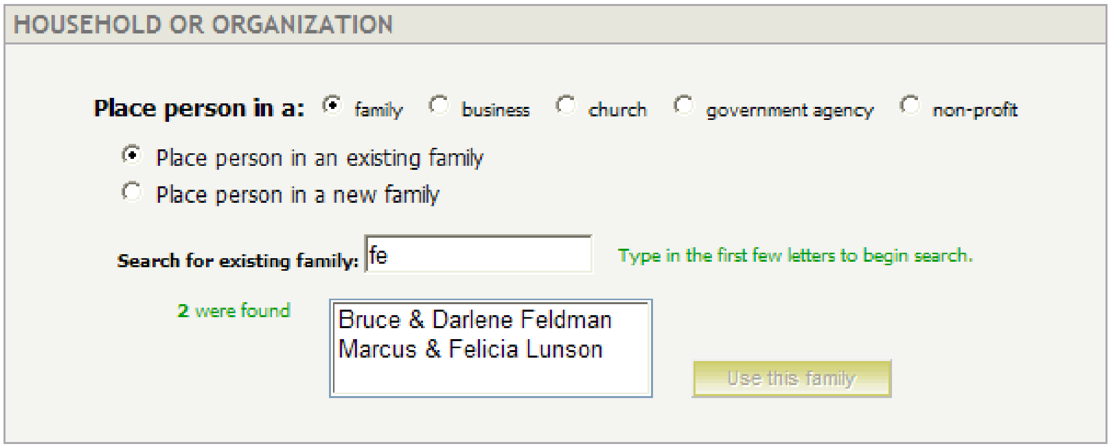
3. Select the type of household into which this person should be placed. Most of the time you would click on **family**.



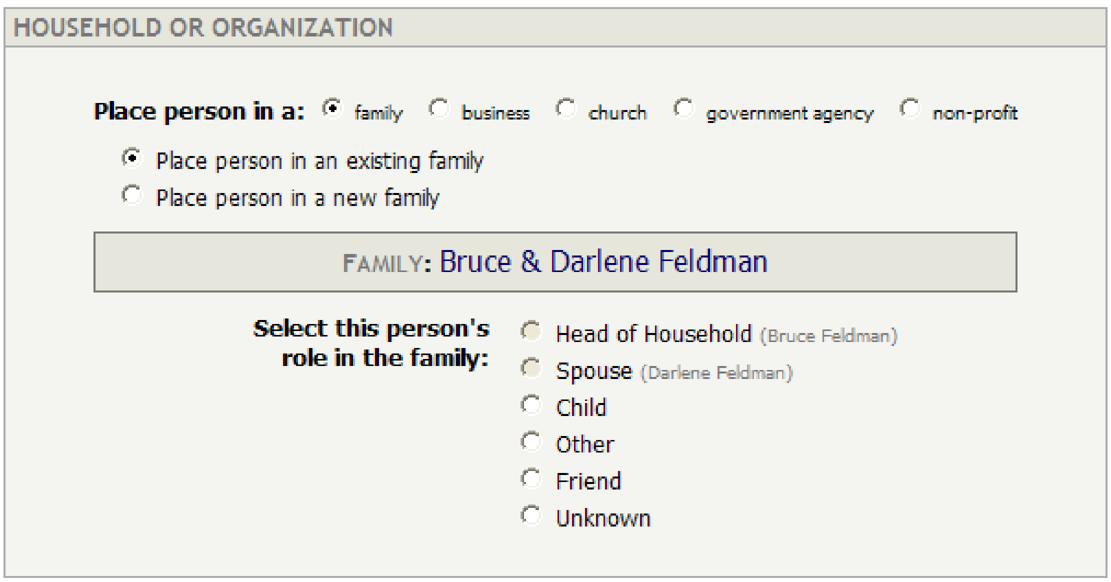
4. Now you much choose whether to place this person into an existing family or into a new family. If you select to place the person into a **new** family, you will be then asked to select the role this person should have within her family.



If you choose to place the person into an **existing** family, you will be asked to search for the existing family. Type the first few letters of the existing family's last name to perform the search. Click on the appropriate family and then click on the **Use this family** button.

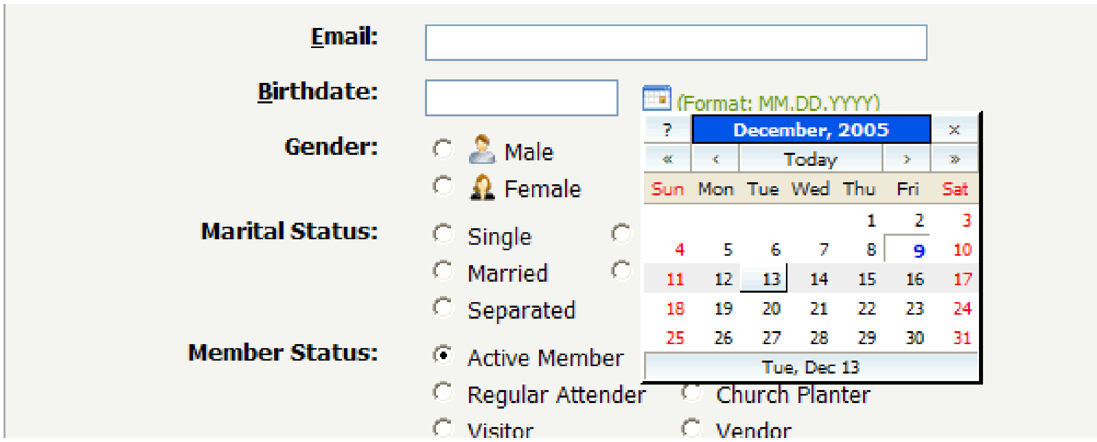


When you select an existing family, Ascribe will show you the family name and the available family roles for the new person. Click on the new person's family role.



5. To mark a phone number as unlisted, check the box to the right of the phone number under the padlock graphic. If a home, work or other phone number connects to a TDD device, check the box under the typewriter graphic.

6. Fill in any other information available. For dates, click on the calendar graphic to use a popup date picker.



7. In the discipleship module section, click any goal which you wish to initiate for this person. If you have a **discipleship goal** set up to follow up with new comers, you might wish to use this section to initiate the new comer goal.

   Time saving tip: *If you are inputting a multiple new comers into the system, check off* ***Remember for next new person*** *in order to have this discipleship goal pre-checked for the next person.*

8. In the group membership section, you can set this new person to be a member of a group. This allows you to rapidly enter both new people into the database who are all in the same group.

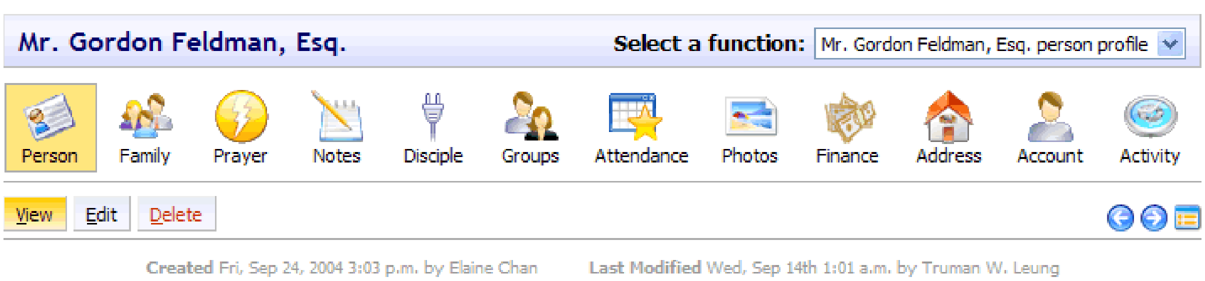
   Time saving tip: *If you are inputting a multiple new people for a particular group, check off* ***Remember for next new person*** *in order to have group membership details pre-filled for the next person.*

9. Click the [Add a new Person] button either at the bottom of the form.

Understanding the person record

Person Toolbar

Below is an example of the toolbar displayed at the top of a person's record.



In the blue header bar, the person's name will be listed. The name is clickable so that no matter which sub-page you go to for this person, the main record page for the person is only one-click away. A variety of functions and sub-modules are available in the drop down list on the right side of that header bar. The sub-modules are also available by clicking on one of the icons in the toolbar. A mini-version of this toolbar will show for all sub-modules.

Person	Main person record page
Family	Person's family/household record
Prayer	Person's prayer requests
Notes	Person's notes and contact logs. These notes can be flagged for display in a **flagged notes** module in the start pages of users with the **Counseling** privilege.
Discipleship	Person's discipleship goal history. Use this sub-module to track connection/assimilation follow-up efforts with this person.
Groups	View/add group memberships for this person.
Attendance	View all the events attended by this person.
Photos	Person's photos.
Finance	Giving history
Addresses	View all the person's addresses
Account	Give person a username and password (and set his/her permissions) to allow access to the Ascribe intranet and extranet.
Activity Logs	List of all this user's actions within the Ascribe intranet

Not every user who logs into Ascribe and is able to view a person's record would see all of these icons in the toolbar. Ascribe will only present the sub-modules which a user has permission to use. Similarly, in the sample person record below, not all the information or links shown will be displayed to all users.

Main Person Record

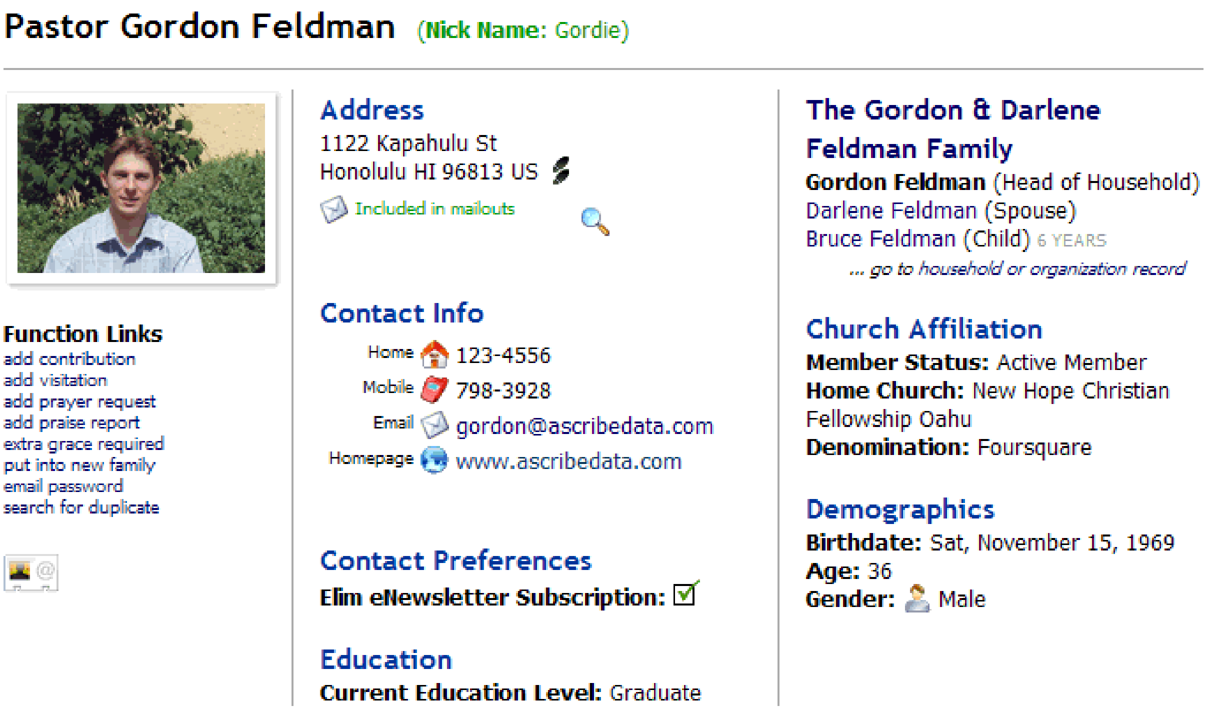


Photo. At the top of the left-hand column, a picture of the person will be shown if there is one. You may click the picture to see a larger version of it and to see any other pictures that are associated with this person. If no picture is available, a link will be provided to allow you to upload one for the person.

Function Links. Based on a person's permission level, some or none of the following function links will be displayed.

- **Add contribution** – enter a financial giving contribution for this person
  (requires bookkeeper privilege)
- **Add visitation** – enter a hospital visitation request on behalf of this person
  (requires data entry privilege)
- **Add prayer request** – enter a prayer request for this person
  (requires prayer privilege)
- **Add praise report** – enter a praise report for this person
  (requires prayer privilege)
- **Extra grace required** – Set this person as requiring extra grace. This function link will toggle this setting on and off.
  (requires counseling privilege)
- **Put in new family** – This is a very useful function when a child grows up and establishes his/her own household. Use this function to take the person out of their current family and create a brand new household based on this person's record

(including financial giving records).
(requires data entry privilege)

- **Email password** – This function will reset the password to some random password and email it to the person's email address. *NOTE: The person's old password will no longer work.* He will have to log in using the new password sent to his email address and then reset the password to whatever he chooses.
  (requires data entry privilege)

- **Search for duplicate** – Will scan the database for possible matching duplicate records and prompt you to consolidate records if any are found.

- **Electronic business card**. Click on the icon to download an electronic business card (i.e., a vCard file) which can be imported into your personal information manager (PIM) program's address book. You may have a PIM (such as Microsoft Outlook) already installed on your computer which can import these electronic business cards.

The remaining two columns of the main person record list various contact, household and demographic information.

Address. The next two columns display his address and contact info. Clicking on the icon next to an address will open a new browser window to attempt to map this address on YAHOO! LOCAL Maps.

Contact Info. Clicking on the icon next to a phone number will open a new browser window to research this phone number on Google.

Household. In the third column will begin with this person's household name and listing of all the people in the household.. *You may click on the household name to view his household record.* Another way to view this person's household is to click on the Family icon in the toolbar.

Other parts to the person record

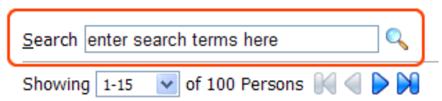
If you have the **Discipleship** privilege, the person's discipleship history will be listed as well as some of the latest contact notes for the person. If have the **Prayer** privilege, you will also see some of the person's latest prayer requests and praise reports.

Simple person search

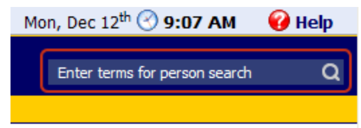
There are many ways to search for people in Ascribe. On the Start Page, there is a search box to quickly find a person by first name, last name or email. At the upper left hand corner of the person listing, there is a search box where you can type in any search terms to search for people (e.g., person names or street names) to search for a person. This simple person search can also be performed from ANY page within Ascribe by using the search box in the right hand side of the blue masthead bar at the top of every screen.

Start Page

Person Module Listing

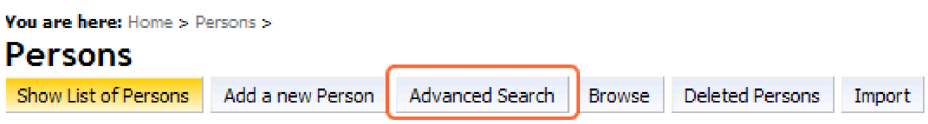


Every Screen

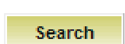


Advanced person search

1. In the person module, click the **Advanced Search** button.



2. In this advanced search form, enter as many search criteria as you need.

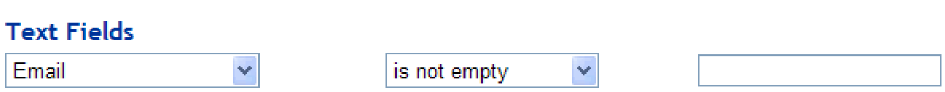
3. Click the  button to view search results.

Advanced search examples

Ascribe's advanced search function is very flexible. You may enter one search parameter or multiple parameters. Here are some examples.

Example #1: All persons who have an email address.

Under **Text Fields**, set the first drop-down select box to **Email.** On that same line, set the next drop-down select box to **is not empty.**

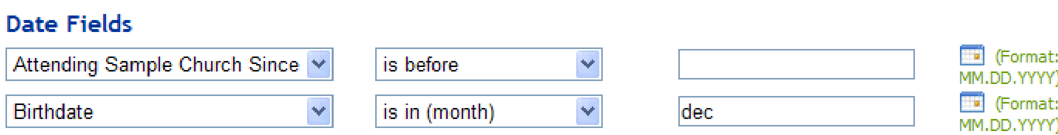


Example #2: People who live in either the 96816, 96822 or 96815 zip codes.

Under **Text Fields**, set the first drop-down select box to **ZIP Code.** On that same line, set the next drop-down select box to **is.** In the text box to the right enter **96816 OR 96822 OR 96815**.

Example #3: Everyone who is born in December.

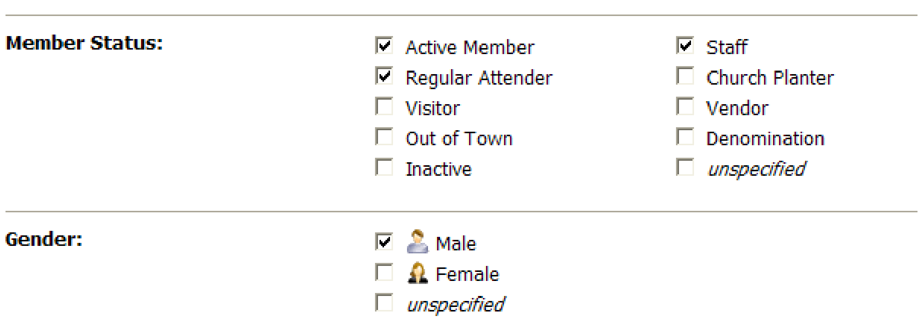
Under **Date Fields**, see that in the second row, the drop-down select box is preset to **Birthdate.** On that same line, set the next drop-down select box to **is in (month).** In the text box to the right you can enter **dec**, **Dec**, **December**, or **12**.



Example #4: Men (ages 25+) who are active members, regular attenders or staff.

Under **Date Fields**, set the first drop-down select box to **Birthdate.** On that same line, set the next drop-down select box to **is before**. In the text box to the right enter the appropriate birth date before which a person would be 25 years old or older. You may click the calendar icon to the right to use a popup date picker.

Then scroll down until you find the **Member Status** and **Gender** sections. Click the appropriate checkboxes.



Whenever you enter more than one search parameter, a person must fulfill each parameter to be included in the search results.

Save advanced search parameters

Do you do the same search on a regular basis? You can save your advanced searches by saving it to your Favorites. To do so, after running an advanced search, click the Add to Favorites link at the top of the screen. You can then re-run this same advanced search at any time by clicking on in your favorite links on the Start Page or in your **Favorites** module.

How to get to the Favorites module: *On the main menu bar, position your mouse over* ***My Ascribe****. In the drop-down menu, click on* ***Favorites.****.*

Export advanced search results

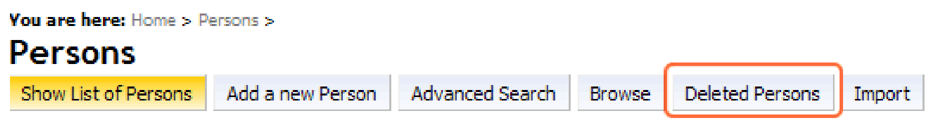
If more than one person was returned in your advanced search results, Ascribe will show you a listing of persons. In the upper right hand corner of this listing, click on one of these export buttons to use the standard export features for the person module:

Email Labels Letters Export

Chapter 4: Person Records Management

Deleted Persons

When you delete a person's record in Ascribe the record is not actually get deleted. Instead it is put into the **Deleted Persons** module. To view the deleted persons, in the person module, click the **Deleted Persons** button.

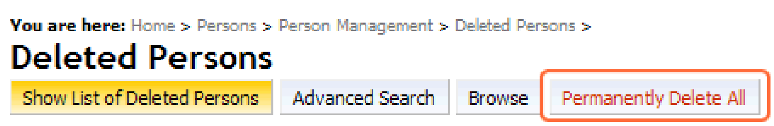


Alternatively, you can reach the **Deleted Persons** module by using the main menu and going to **Home > Persons > Person Management > Deleted Persons**.

In the listing of deleted persons, click the icon to **undelete** a person record. Click the icon to **permanently delete** a person's record.

If a person's record has been deleted, no emails will be sent to them from Ascribe. Also, Ascribe will not include them in mail merged letters or mailing labels.

To permanently delete all "deleted persons" click the **Permanently Delete All** button in the Deleted Persons module.



People Data Import

You can rapidly import person records complete with name, address, contact information and much more. You just have to create a data file in the tab-delimited text format containing that the information for people that you want to import into Ascribe. Upload the file with this module and the batch of person records found in the file will be rapidly created in Ascribe. If you find that there was an error with the file, the module can also automatically remove the person records created with that upload file. Basically, you can import people data with the security of mind of knowing that you can also undo the import if necessary.

Prepare a data import file

Prepare your data file using a spreadsheet program (such as Microsoft Excel). Here is an example of what this data file can look like:

FName	LName	Address	city	state	zip	country	HMPhone

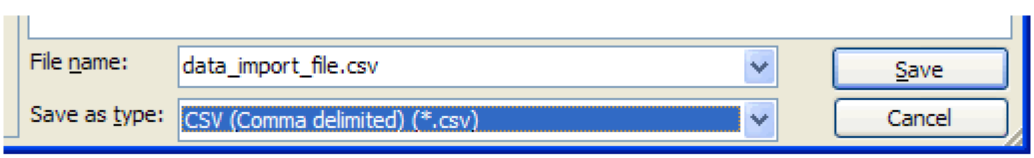
Aaron	Abergas	95-229 Kaopuu Loop	Whitfield	HI	96789	US	685-3224
Aina	Abergas	95-229 Kaopuu Loop	Mililani	HI	96789	US	685-3224
Kona	Abergas	95-229 Kaopuu Loop	Mililani	HI	96789	US	685-3224
Michelle	Abergas	95-229 Kaopuu Loop	Mililani	HI	96789	US	685-3224

The following are some of the common fields can be imported using this tool.

- First Name (or `FName`)
- Middle Initial (or `MI`)
- Last Name (or `LName`)
- Prefix (or `name_prefix`)
- Suffix (or `name_suffix`)
- Full Name (or `name_combined`)
- Short Salutation Name (or `salutation_name`)
- Nick Name (or `nick_name`)
- Required Address Line (or `address`)
- Optional Address Line (or `address2`)
- City (or `city`)
- State (or `state`)
- ZIP Code (or `zip`)
- Country (or `country`)
- Home Phone (or `HMPhone`)
- Work Phone (or `WKPhone`)
- Mobile Phone (or `Cell`)
- Pager
- Fax
- Other Phone (or `Other`)
- Email
- Homepage (or `homepage`)
- Hobbies (or `hobbies`)
- Occupation
- Employer
- Member Status (or `Status`)
- Gender
- Birthdate (or `BD`)
- Marital Status (or `MS`)
- Wedding Date (or `Anniversary`)
- Current Education Level (or `curr_edu_level`)
- Current School/College (or `curr_school`)
- High School Class (or `hs_year`)
- Highest Education Level (or `edu_level`)

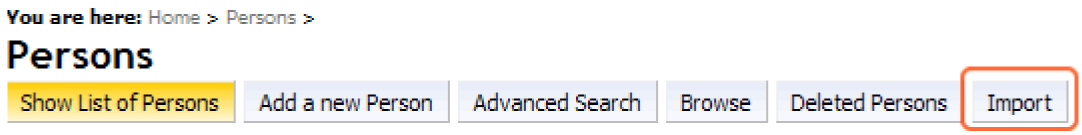
Use one of the above field names to label each column in the data file in the first row. Use each row after that for each person's record that you wish to import. See the complete listing of **Importable Fields**, in the People Import module.

Once you are done with the data file, "**Save As …**" to the **comma separated values** (CSV) file format.



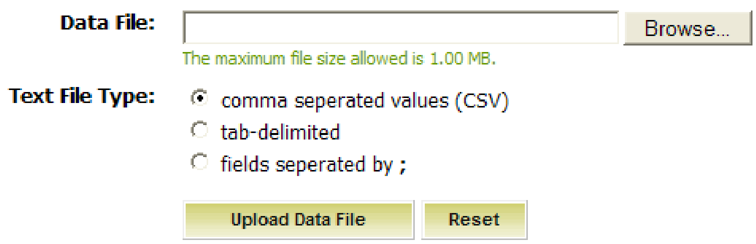
Import people data

1. In the person module, click the **Import** button.

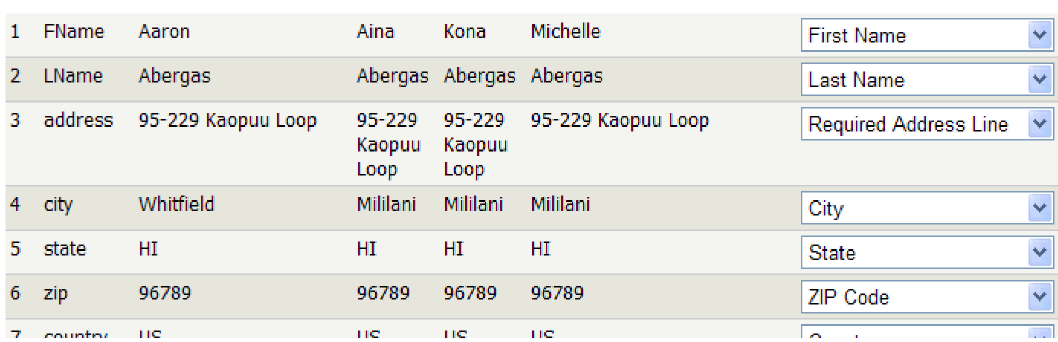


Alternatively, you can reach the People Data Import module by using the main menu and going to **Home > Persons > Person Management > People Import**.

2. **Upload the data file to Ascribe.** Click the **Browse…** button, select the data file which is saved on your computer. Then click the **Upload Data File** button to upload the file.



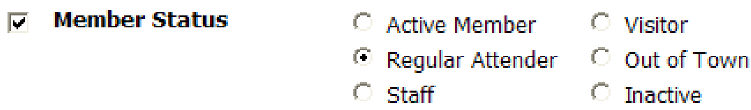
3. **Match fields.** Ascribe will analyze your data file which you have uploaded and preview the first five rows and present them vertically. The reason Ascribe does this is to allow you match up each column from your data file to a particular field within the Ascribe person module. If column value of the first row matches the field name of an importable field, Ascribe will automatically match the fields for you.



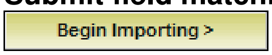
1	FName	Aaron	Aina	Kona	Michelle	First Name
2	LName	Abergas	Abergas	Abergas	Abergas	Last Name
3	address	95-229 Kaopuu Loop	95-229 Kaopuu Loop	95-229 Kaopuu Loop	95-229 Kaopuu Loop	Required Address Line
4	city	Whitfield	Mililani	Mililani	Mililani	City
5	state	HI	HI	HI	HI	State
6	zip	96789	96789	96789	96789	ZIP Code
7	country	US	US	US	US	

4. **Batch-wide field value settings**. An identical value for certain fields can be set for every person imported in this batch. Scroll down to the **Batch-Wide Field Value Settings** area and click on any settings you would like to apply to every person in the upload field.

For example, if you want to set every person in this upload file to have the “Regular Attender” member status, then check **Member Status.** Check “Regular Attender” in the options that appear to the right.



If you would like every person in the upload file to also be added as a member of a ministry or small group, click one of the **Group Membership** setting options. Select the desired group from the drop-down select box that appears to the right. Also set the group membership type. Optionally, you can set the group member title and comments.

5. **Submit field matching and batch-wide field value settings**. Click on the  button.

6. Click on the **Start** button to begin the import process.

If a duplicate record is detected during the import for one of the rows in the data file, that person will not be imported.

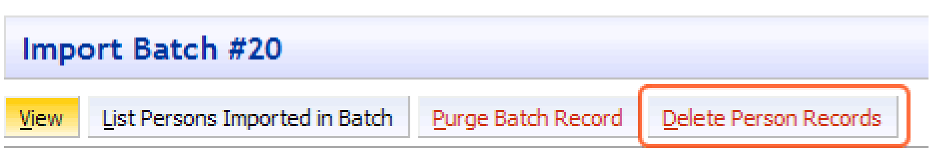
Review an imported data file (batches)

1. In the people import module, click the **Show List of Import Batches** button.

2. Click on the  button for a batch that you wish to review.

Delete records imported from a data file

If you realized that there were errors in the data file which you uploaded, you may click on the **Delete Person Records** button to delete all the person records which were imported from a particular data file.

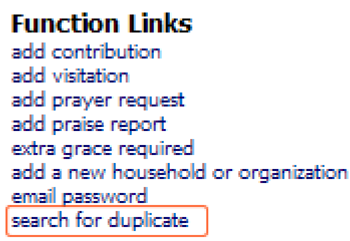


Merge Duplicate Person Records

Having duplicate records is a common problem when maintaining a database of people. Often when entering new persons into a system from handwritten forms the spelling of names can be illegible. Sometimes misspellings due to by illegible writing cause duplicate records. Database managers sometimes refer to the removal of duplicate records as "scrubbing the database". This is an important process in maintaining a current database so that you can always have accurate counts of active members and make sure you keep

Merging duplicates from a person record

If you know that a person has multiple records within the system, go to one of their records. In the **Function Links** section under their photo, click on **search for duplicate.**



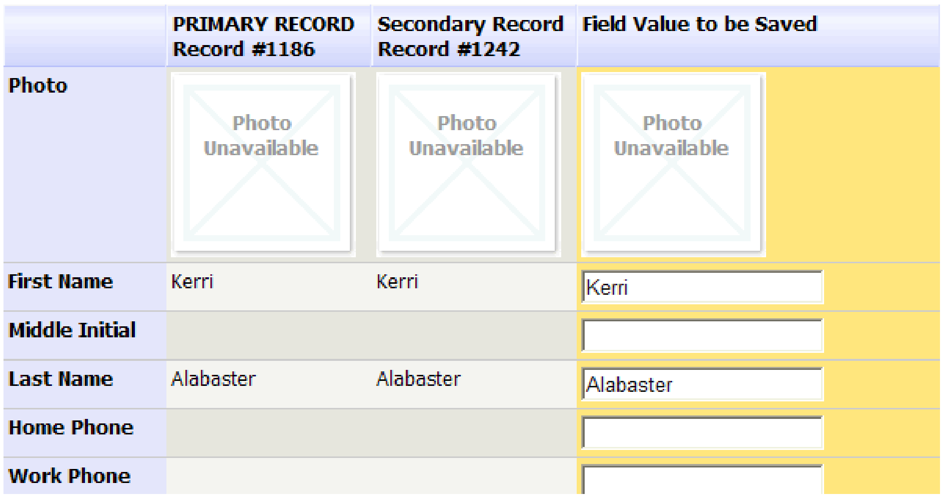
Ascribe will then search for duplicate records that match the person's first and last name. If any are found, you will be prompted to proceed with a merge.

Searching for duplicates

To search for duplicates, go to the person module. Scan the person listing for duplicate names. When you find one, hold the SHIFT key down while clicking on the person's name of one of the duplicate records. This will open that record into a new browser window. Then under the **Function Links** section click on the **search for duplicate** link. Once the merge has taken place, close this browser window and return to the original browser window showing the person listing. Then you can continue scanning the persons listing for possible duplicates.

Consolidate two person records

Upon searching for duplicates, when Ascribe finds two possible duplicates, it will present you with a table with three columns. The first column will show field values from the first person record; the second column, values from the second person record; and the third column contains editable fields with values that will be retained once the two records are merged. Scroll down the form to make sure that the values in the highlighted third column are the values you wish to retain for the person. Once you are finished, click the Commence Merge Process button at the bottom of the form.



	PRIMARY RECORD Record #1186	Secondary Record Record #1242	Field Value to be Saved
Photo	Photo Unavailable	Photo Unavailable	Photo Unavailable
First Name	Kerri	Kerri	Kerri
Middle Initial			
Last Name	Alabaster	Alabaster	Alabaster
Home Phone			
Work Phone			

Chapter 5: Discipleship

Assimilation and church growth are popular topics in church leadership circles. Buzzwords like "growth potential", "visitor retention" and "fulfillment phase" may leave one wondering whether we are talking about church or B2B marketing. Yet techniques proven to work in business are not necessarily too unspiritual to be beneficial in churches. What matters is a heart to redeem every tool at our disposable for the gospel in order to obey the Lord Jesus' command:

> *All authority in heaven and on earth has been given to me. Therefore go and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything I have commanded you. And surely I am with you always, to the very end of the age.*
>
> *Jesus Christ, Matthew 28:18-20*

Ascribe's discipleship module was crafted to equip churches with tracking tools to make sure people don't *fall through the cracks* as churches work to obey Christ and make disciples.

Discipleship module overview

Using the discipleship module, you can track a person's spiritual progress by setting any number of discipleship goals. These goals will be placed in a hierarchy of prerequisites. The church should set up goals which make sense for the church. For example, the first goal could be *Salvation*, then *Water Baptism.* Water baptism would require the prerequisite of Salvation. A third goal could be *Membership*, under water baptism. Then add any other goals which you wish tracked for every member in the church (e.g., CLASS1, CLASS2, CLASS3, etc.). For every discipleship goal that you create, you can establish multiple steps. For each person discipled under the goal, Ascribe allows you to track their progress step-by-step until their either achieve the goal or you stop the goal for the person.

Newcomer Welcome Scenario

Suppose we set up a goal to monitor the process designed to warmly welcome a visitor into the church. First we will take a look at the newcomer process from the perspective of the visitor. Then we will look at it from the backend process run by church volunteers and staff.

Visitor perspective

Imagine this scenario of a first-time visitor to your church:

> Carleen, single physical therapist, aged 27, moves into a new neighborhood and decides to visit a church that meets at a few blocks away. Carleen enjoys the service and fills out a welcome visitor card. The next day, on Monday, a friendly lady named Sharon calls Carleen and introduces herself as a member of the church she visited.

She thanks Carleen for visiting the church and comments that she indicated on her welcome card that one of her hobbies is running. Sharon mentions that she is a member of the Running Club at the church and would love to meet Carleen after service next Sunday so that she can introduce her to some of the other members of the club. A couple days later, on Wednesday, Carleen receives a letter from the pastor the church expressing how glad he was that she came for a visit and invites her to come again. The following Sunday, Carleen goes back to the church. After service, she meets up with Sharon and a few of her friends from the Running Club. One of the girls from the club, Anne, invites Carleen to join her for coffee later that week and she is looking forward to it.

Church volunteers and staff perspective

In the above example, the church designed a carefully thought-out process to make sure each person who visits the church is shown the love of Christ by being warmly welcomed. Ascribe can be used to help manage this process on the backend. Imagine this scenario:

The church has a team of four volunteers who each takes home a share of the welcome visitor cards filled out each week at the end of the last service on Sunday. Mark is one of these data entry volunteers. On Sunday afternoon, he takes his laptop to a nearby Starbucks and, using the T-Mobile Hotspot, connects to the Internet and logs into Ascribe. Today he has eleven visitor cards. Five of them have the *first-time visitor* box checked. For those five, Mark makes sure to check to initiate the **Newcomer Welcome** goal at the bottom of the **Add a new Person** form as he creates new person records for them.

Rebecca is the goal manager for the **Newcomer Welcome** goal, which has been set up for mentoring. For each of first-time visitors, whom Mark and the other data entry volunteers entered into the system and initiated the **Newcomer Welcome** goal, Ascribe automatically sends an email to Rebecca informing her that the goal had been started for a particular first-time visitor. The email asks Rebecca to log into Ascribe and assign a mentor to the newcomer. On Sunday night, after Mark and the other data entry people had finished entering all the welcome visitor cards, Rebecca turns on her home computer and sees that she has 14 emails from Ascribe. She logs into Ascribe and looks individually at each of the new people that were added to the goal. One of the newcomers is a woman named Carleen. Rebecca notices from the *hobbies* field that Carleen likes to run. So she sets Sharon, the leader of the Running Club, to mentor Carleen. When she does so, Ascribe automatically sends out an email to Sharon asking her to follow up with Carleen.

On Monday morning, Sharon checks her email and finds out that she has been assigned a newcomer named Carleen to welcome. The email contains Sharon's contact information. Later that day Sharon phones Carleen on her cell phone and after chatting for a while invites Carleen to meet up with her and some of the other members of the Running Club the following Sunday after church. After hanging up, Sharon logs into Ascribe and goes to her ***My Disciples*** page and finds Carleen's discipleship record. She clicks the  button next to the "welcome phone call" step and writes a little note about her conversation with Sharon. Then she sets the **welcome phone call** step as achieved.

On Tuesday afternoon, Barbara the church office manager works on the pastors welcome letter mail out. Going to the **Discipleship** module, she clicks on the  icon for the **Newcomer Welcome** goal. This takes her to a listing of all the newcomers being welcomed. She drills down to a listing of all newcomers who have not yet received a welcome letter from the pastor. She uses Ascribe's mail merge function to generate mail merge letters to all of them. Barbara also uses Ascribe's label function to generate mailing labels. After printing, she gets Pastor Bob to sign all of the letters and sends out the letters. Finally, Barbara marks down in Ascribe that **pastor's welcome letter** step was completed for all those people..

On the following Sunday, Sharon meets up with Carleen after church and introduces her to several of the other members of the Running Club. Carleen seems to quickly take to Anne, who invites Carleen to meet her for coffee later that week. That evening Sharon logs into Ascribe and writes a note in Carleen's discipleship record about how she met up with several members of the Running Club and how Anne was planning on having coffee with her. She marks the date when the **Meet at church** step was completed.

A few days later, Anne phones Sharon and tells her how much she enjoyed meeting up with Carleen at Starbucks and how Carleen plans to join them at the club's normal running day on Wednesday afternoons. Sharon logs into Ascribe again and writes another note. She marks the date when the **Meet for coffee** step was completed and that the entire **Newcomer Welcome** goal was achieved.

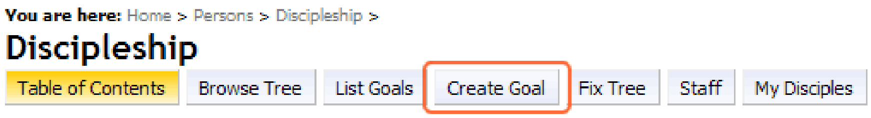
Finding the module

The **Discipleship** module is found just off the main menu under **Persons.**

Discipleship goals

Create a discipleship goal

1. Click on the **Create Goal** button.



2. **Hierarchical Placement.** *If at least one other discipleship goal was already created*, you will be asked to place the new goal within the prerequisite hierarchy of existing goals. By placing a goal under another goal, the parent goal becomes a prerequisite which the person much achieve before being allowed to start on this goal.

   You may wish to read the section of the manual on placing a new record within a hierarchy.

   If you a making a sub-goal (i.e., a goal that requires a prerequisite goal), you may find it easier to first go to the prerequisite goal and click on the **New Goal** button.

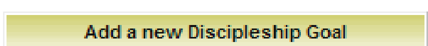
   

3. **Name.** Set the *name* the goal.

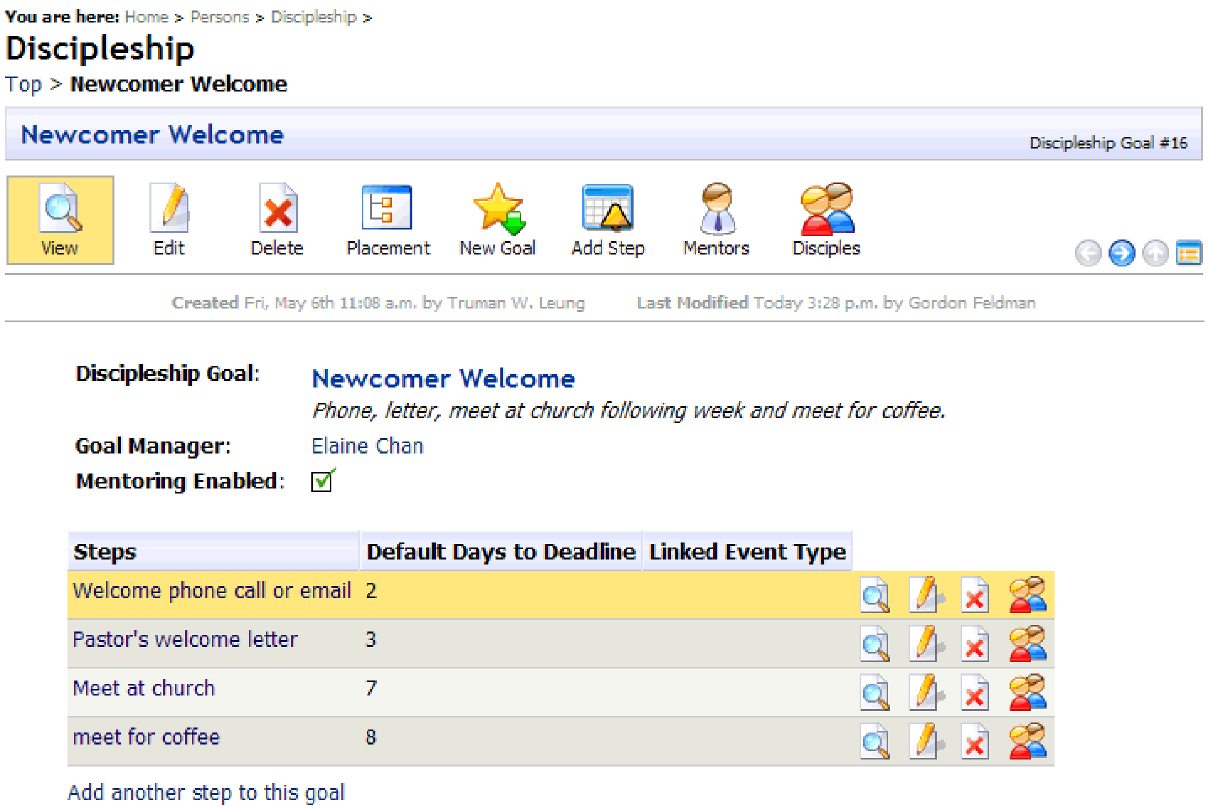
4. **Description.** The *description* is an optional field.

5. **Goal Manager.** For most goals, you should set a *goal manager*. The goal manager must be an authorized user with the *Discipleship* privilege.

6. **Mentoring.** If this discipleship goal can best be handled by assigning mentors to follow-up people discipled under the goal, click the **Enable Mentoring** field. Select the **Mentor-Mentoree Pairing Mode** which makes sense for this goal.

7. Click the  button.

Understanding the goal record view



Above is a simple discipleship goal record. At the top is a toolbar of function buttons. In addition to the standard View, Edit and Delete buttons is a **Placement** button which you can use to adjust this goals placement within the hierarchy of goals. If you want to add a new goal below this one, use the **New Goal** button. To add another step to this goal, use the **Add Step** button. (Steps will be fully discussed below). The **Mentor** and **Disciples** buttons take you to a listing of the mentors and people being discipled under this goal, respectively.

The main body of the record lists the name of the goal and a description, if any. The goal manager is shown, if one was set. The goal manager’s name is clickable allowing you quick access to her person record, should you need it. At the bottom of the form is a listing of all the steps in the goal.

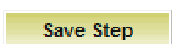
Goal steps

Every goal is made up of incremental steps which lead up to the achievement of the goal for a person. For example, if the goal is **Water Baptism**, a preliminary step may be **Expressed Interest** to record the date on which the person expressed interest in getting water baptized. An optional subsequent step may be **Attended Water Baptism Bible Study**. Be sure to always also include a final step for the actual achievement of the goal, such as **Water Baptized**.

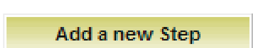
Whenever you create a new discipleship goal, Ascribe will automatically set it up with two generic steps: expressed interest (due in 15 days) and the achievement of the goal (due in 30 days). After creating the goal, you should customize these and add any additional steps that make sense for the goal. For every discipleship goal, you can set an unlimited number of steps. These are measurable steps which allow you to track a person's progress toward achieving the goal.

Once you start a goal for a person, Ascribe will automatically schedule out target dates for each step to be accomplished based on today's date.

Edit a goal step

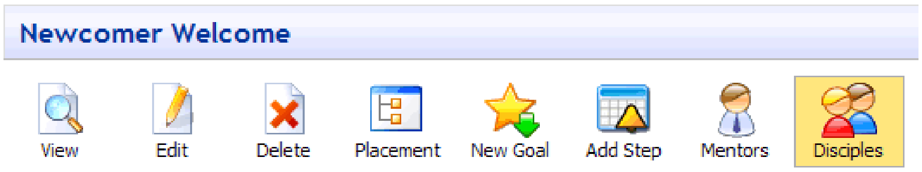
1. Go to the discipleship goal record.
2. Click the  icon for the step you wish to modify.
3. Edit the **Name** of the step, if you wish.
4. To change the number of days out from the date when a goal is started for person when Ascribe should schedule a steps completion deadline, modify the **Default Days to Deadline** field value.
5. *Advanced Tip:* You may also set the type of event which if a person attends an event of that type, then this step will automatically be completed. This is useful if event attendance is a step in completing a goal.
6. Click the  button.

Add a goal step

1. Go to the discipleship goal record.
2. Click on the  button.
3. Set a name for the step.
4. Set the default number of days to deadline.
5. Click the  button.

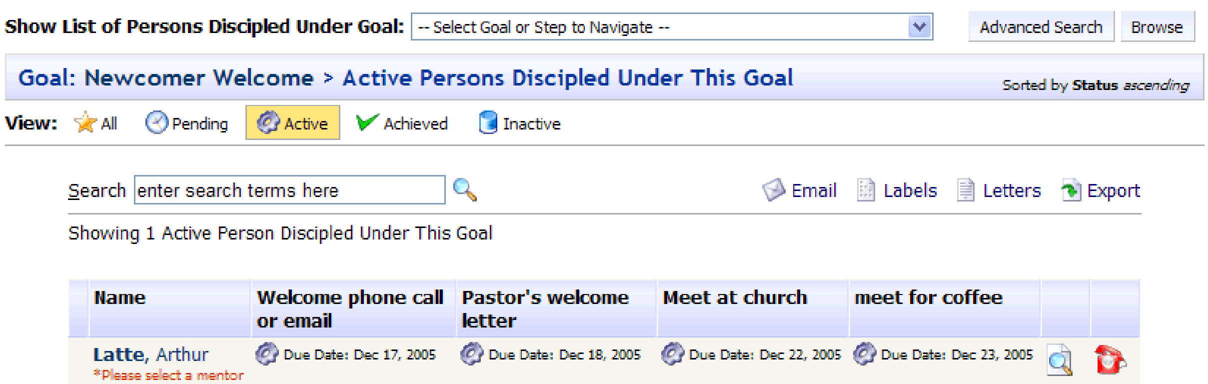
Goal disciples

To list all the persons discipled under a goal, click the icon for the goal in the main listing of goals for the **Discipleship** module. Alternatively, when you are already in a goal record, you can click on the **Disciples** button on the goal record toolbar.



Understanding the disciples listing

The person listing for a goal allows you to see at a glance which people are being actively discipled in a goal and which steps are past due. From this listing you can also use a number of standard export options: email, labels, mail merged letters, printable reports, and Excel spreadsheets.



List disciples by goal achievement status

You can limit the people listed according to their status. For example, if you wanted to see a listing of all the people who are *saved*, go to the **Discipleship** module and click on the icon for the **Salvation** goal. Then click on the **Achieved** button to view all the persons who have achieved this goal.

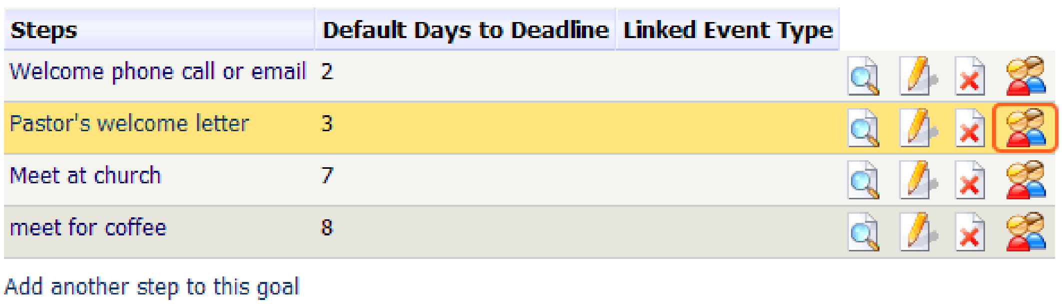
List disciples by step achievement status

Some people are responsible for only one particular step in a goal. For example, the church secretary in the scenario above was responsible for sending out the **pastor's welcome letter**.

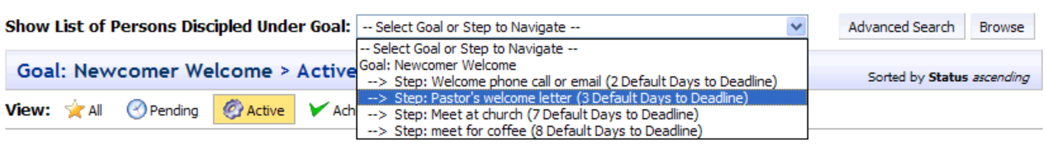
In order to do that, she needed to find out who was being discipled under the **Newcomer Welcome** goal that did not yet receive the letter. To do so, she needed to **list disciples by step**.

There are two ways to list disciples by step.

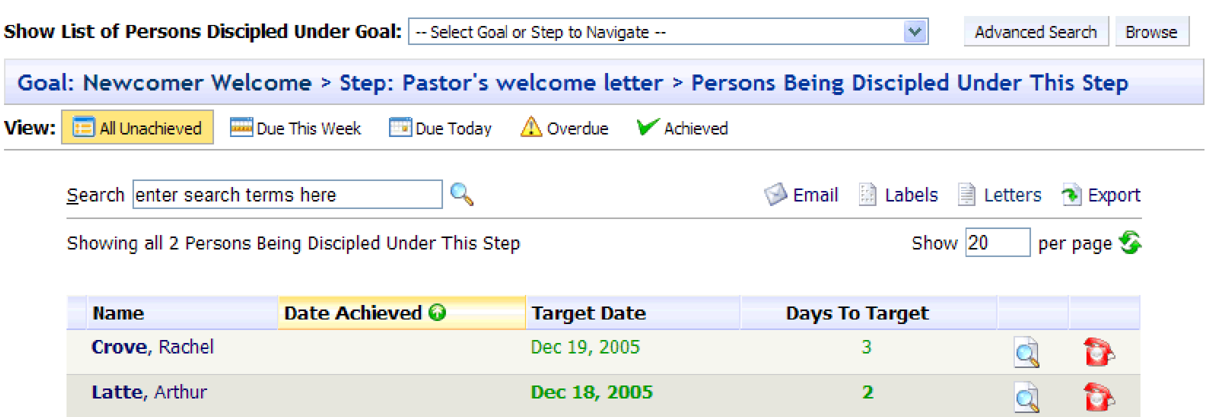
Method #1: From the goal record, locate the step in question and click on the icon at the end of the step's row.



Method #2: From the disciple listing, use the drop down menu labeled **Show List of Persons Discipled Under Goal** to list information about a certain step.



Once you have successfully **listed disciples by a particular step** you will see a listing like this one:



Notice how now the list shows the target dates for just this step. Plus it also now shows the **days to target**, meaning the number of days until this step's deadline.

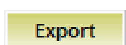
Print mail merged letters to people being discipled

You can set up letter templates that using the **Letter Templates** module which you plan to regularly use for a particular step in the discipleship process. After **listing disciples by that step**, click on the **Letters** link at the upper right hand corner of the listing.

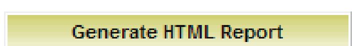
Print a call list of people being discipled

1. Click on the **Export** link at the upper right hand corner of a disciple listing.

2. Select **Printer Friendly HTML**.

3. Click the  button.

4. Select which fields to be included in your Call List.

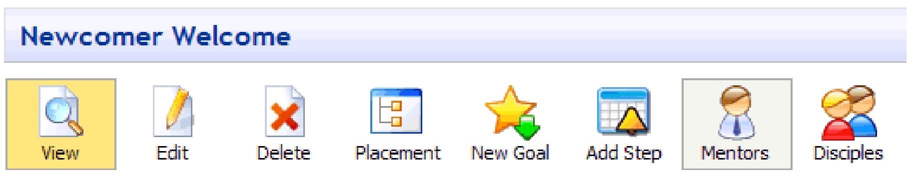
5. Click the  button.

Goal mentors

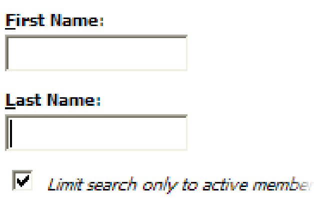
When you **enable mentoring** for a discipleship goal, Ascribe will allow you to assign mentors to specific disciples. Mentors are people who are responsible for following up with a disciple and helping them achieve each step in a goal.

Add mentors to a goal

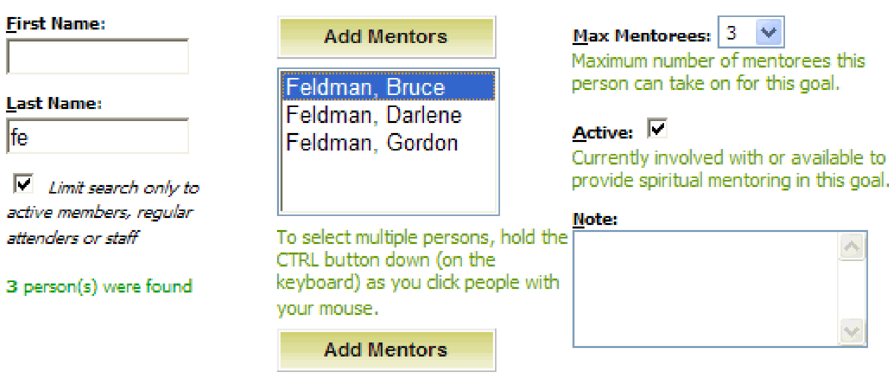
1. Go to a goal record.
2. Click on the **Mentors**  icon in the record toolbar.

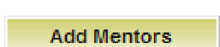


3. You will be asked to enter the first few letters of the last name of an existing person in the database to be added as a mentor.



4. Select a person to be a mentor from the search results.



5. Click the  button.

Manually set a mentor for a disciple

1. Go to a goal record.
2. Click on the **Disciples**  button in the goal toolbar.

3. Click the *Please select a mentor link for a disciple who has not yet been assigned a mentor.

   -- or --

   Click on the icon to view this person's goal status record. Then click on the **Mentor** icon in the toolbar.

4. Select the appropriate mentor.

5. Click the Set discipleship mentor button.

Once the mentor is set, Ascribe will attempt to send an email to the mentor notifying him that he has been assigned a new disciple to follow-up with.

Mentor-Mentoree Pairing Mode

When mentoring is enabled for a discipleship goal, there are three types of mentor-mentoree pairing modes that can be set for the goal:

1. Let Ascribe auto assign mentors on a round-robin, as-available basis.
2. Allow goal manager to manually assign mentors.
3. Have Ascribe send out an email to available mentors and ask them to volunteer to mentor new persons being discipled under this goal.

When a person has a discipleship goal started for them, if the goal has mentoring enabled, the selected mentor-mentoree pairing mode will be triggered. In the auto-assignment method, Ascribe will cycle through available mentors, assign the next mentor and send an email to the mentor notifying her of the assignment. In the second mode, Ascribe will send an email to the goal manager that a new disciple was added and that he should assign a mentor. In the third mode, Ascribe will send out emails to all available mentors asking them to volunteer to mentor the new disciple.

Contact Logs

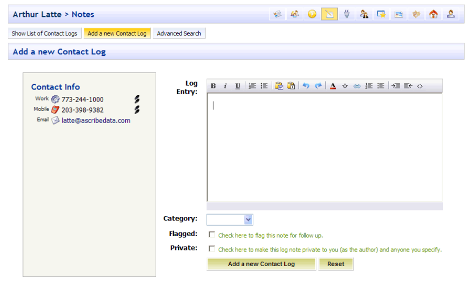
Some steps in the discipleship goal process may require telephone contact or personal meeting. You can use Ascribe to log notes regarding your calls and meetings. There are many ways to add a contact log note to a person's record. Once the notes are entered into the system, all notes for a person can be viewed under their person record. Or notes for all people discipled under a certain discipleship goal can be read by going to the goal record.

From within the **Discipleship** module, any time you see an icon, you can click it to set a contact log note for a person.

Phone numbers listed in edit form

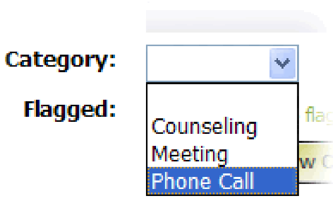
While entering contact log notes, any contact information will be listed on the left side. This is useful when making phone calls and recording notes at the same time.

Any relevant discipleship information will also be listed on the left side.



Entering a contact log note from a person record

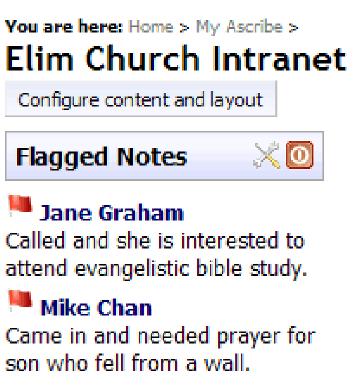
1. Go to a person's record.
2. Click on the **Notes** button in the person record toolbar.
3. Fill out the note in the **Log Entry** field.
4. If categories have been set in the **Notes** module, select a category.



5. Check the **Flagged** box if you wish this note to be flagged.
6. Check the **Private** box if you want to hide this note from other users.

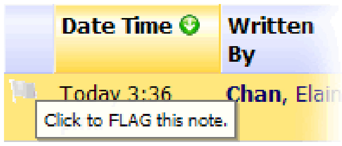
Flagged notes

You may flag notes so that you and other users with the *Discipleship* privilege can know to follow up on a particular note. Flagged notes are displayed on the Start Page for all users with the *Discipleship* privilege.

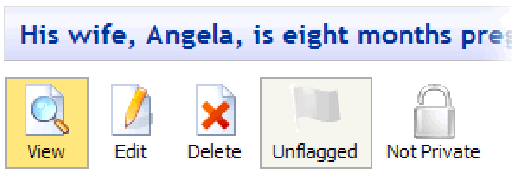


There are multiple ways to flag a note. You can click the **Flagged** box when editing a note.

When viewing a list of notes within a person record, you can click on the *grayed-out* flag in order to flag a note.



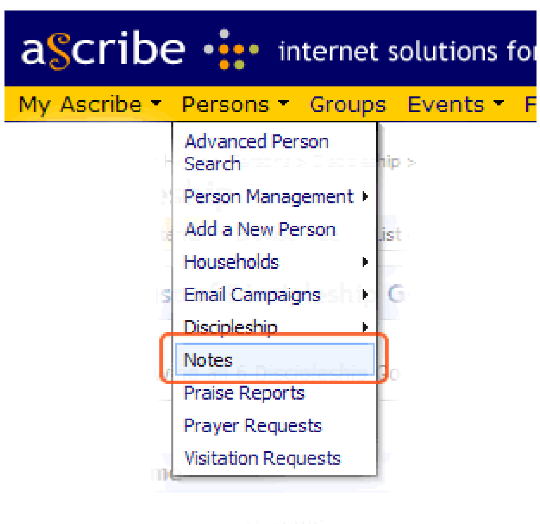
You can also flag a note by clicking on the **Unflagged** button with the *grayed-out* flag in the record toolbar when viewing a note record.



You can unflag a flagged note by clicking on the red flag icon.

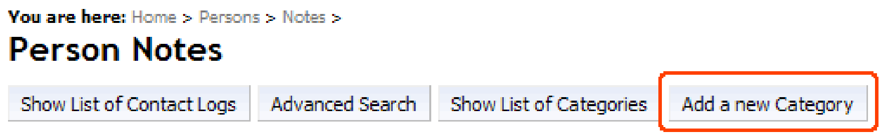
Viewing all contact log notes for all people

To view all contact logs for all people entered into Ascribe, go to the **Notes** module.



Contact log note categories

Sometimes it is helpful to categorize notes. You can do this by going to **Notes** module and clicking on the **Add a new Category** button.



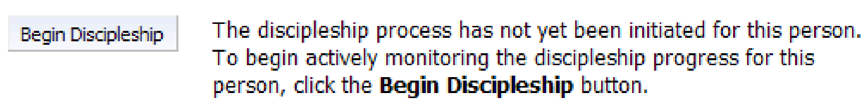
Once you add note categories, then as you enter log notes you can also put them in one of your custom categories.

Person discipleship

Every person record's main page has a **Discipleship** section that displays a person's spiritual history. This same spiritual history is available via the discipleship sub-module under this person's record. To access this sub-module go to a person's record and click on the **Disciple** icon in the toolbar.

Begin discipleship for a person

Before discipleship goal process can be tracked for a person, you must first begin discipleship for her. If discipleship has not yet begun for a person you will be presented with a **Begin Discipleship** button in the Discipleship section of her record's main page and also in the discipleship sub-module.



Person's spiritual history

Once discipleship has begun for a person, all the discipleship goals that are defined in the **Discipleship** module will be displayed both in the Discipleship section of the person's main record page and in the Discipleship sub-module.

Set a goal as achieved today

1. Go to a person's record and scroll down to the **Discipleship** section.
   -- or --
   Go to the person's **Discipleship** sub-module.

2. Click on the icon at the end of the row for the goal.

Set multiple goals as achieved today

3. Go to a person's record and scroll down to the **Discipleship** section.
   -- or --
   Go to the person's **Discipleship** sub-module.

4. Check the box to the left of goals which are highlighted in orange which you wish to set as achieved today.

5. Click the Set Checked Goal(s) as Achieved Today button.

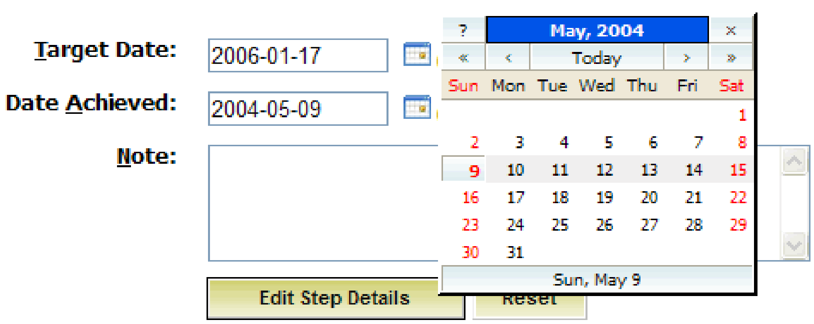
Set a goal as achieved on a certain date

1. Go to a person's record and scroll down to the **Discipleship** section.
   -- or --
   Go to the person's **Discipleship** sub-module.

2. Click on the icon for the goal to start the goal for the person.

3. The goal will be initiated and Ascribe will display the person's goal status page. In the **Steps** section, click the icon for the last step.

4. Click the icon to the right of the **Date Achieved** field. Select the desired date.



5. Click the Edit Step Details button.

Chapter 6: Web Publishing

Ascribe contains an integrated website publishing system that allows your church to maintain an informative, up-to-date website.

Web publishing overview

The webmaster bottleneck

The major roadblock to maintaining a current website is the bottleneck of the “webmaster”. For many websites a single person is often designated as the webmaster. The webmaster is tasked with the daunting technical challenge of learning all about webpage code (called HTML), webpage editors (like Macromedia Dreamweaver) and graphics programs (like Adobe Photoshop). The webmaster also responsible for crafting well-written content for the site’s many pages and for making sure to keep the pages updated on a timely basis. There are several problems with this scenario:

1. *No one person can do all things.* The webmaster that is great at web development is probably not as good at writing newsworthy story articles as she is at designing user-friendly site navigation with an eye-pleasing color palette.
2. *Hand coding each page is time consuming*. The webmaster responsible for managing a website with hundreds of pages would be hard-pressed to find enough time to make site-wide changes to the website design if they had to update each page manually.
3. *Change requests from all over the organization would be overwhelming*. If many ministries and departments all make requests to a single webmaster for changes and new pages, the request may back-up in the webmaster’s inbox.

The solution to the *webmaster bottleneck* is to implement a content management system.

Content management system

The power of a content management system (CMS) lies in its ability to separate content from design. The graphic artists and web programmers use the *design* functions of the CMS to establish the look-and-feel of the website. They determine the site’s graphic elements, fonts and color scheme. The writers and ministry leaders use the *content* functions to write the text of stories and input data into the site. Then the CMS puts integrates the content into the design and publishes the website.

The beauty of a CMS is that it lets graphic designers do what they do best: graphic design. And it lets writers focus on what they do best: write. When everyone does what they do best, work gets done faster and better.

What kind of website can I make with Ascribe?

With Ascribe you can support virtually any website design. Its **skin** module was designed to flexibly accommodate almost any website template. Each skin which your graphic designers setup define a particular look for a webpage. You can have as many skins as you like allowing you to have the different sections of your website look different.

With Ascribe you can publish a website with unlimited pages, both static pages and database-driven pages. Static pages are your common, everyday web pages which contain text and graphics. Database-driven pages are web pages which grab information from the database every time someone wants to view the page. Ascribe supports the following types of database-driven web pages:

- Event calendars
- Announcement listings
- Ministry listings
- Small group directories
- Photo galleries
- Frequently asked questions
- News articles
- Custom forms

Easy-to-understand web page addresses

One of the best benefits of the Ascribe CMS is that you can set easy to understand file names for your pages. If you have an **About Us** page on your web site, Ascribe allows you to publish it to:

`http://www.*your-domain*.com/about_us.html`

Other content management systems force you to use website page URLs like:

`http://www.*your-domain*.com/templates/cusmyopendoor/details.asp?id=28065&PID=195238`

-- or --

`http://www.*your-domain*.com/w_page.php?id=65&type=section`

If you are the leader of the college age ministry called Xtreme at your church, you would probably much rather put `www.*your-domain*.com/xtreme.html` into the signature line of your emails than `www.*your-domain*.com/templates/cusmyopendoor/details.asp?id=28065&PID=195238`.

Ten steps to an Ascribe-powered website

Creating a website is never a quick one-step process. It requires time and planning. But if you follow these steps you should have your Ascribe-powered website up and running in short order.

1. Purchase a **domain name** for your church website.
2. Think about the **focus** of the site. Is it targeted to church members, believers looking for a church, unchurched non-believers?
3. Create a **site map** which lists all the titles of the pages you wish to have in the website in order to reach your goals for the site.
4. **Write out the content** of each of the pages of your website. This will probably be the most time consuming steps in the process as it will require that you get information from every ministry in your church.
5. Collect **graphics and photos** that you wish to use to decorate the site.
6. **Design** the website using professional web design software such as Macromedia Dreamweaver and Adobe Photoshop.
7. Create one or more **skins** in Ascribe using HTML templates based on the HTML code from your web design(s).
8. Use the web pages module in Ascribe to create and **input all your pages and content,** and in so doing build out the hierarchical site map of the site.
9. Use the various content management modules to **enter data** for the database-driven pages in the site. For example, enter all the upcoming events into the events module so that when you publish the church event calendar on the website it will have events in it.
10. **Publish** the site using Ascribe.

The most important component to any media piece is what you're saying rather than the media you use to deliver your message. For example, a writer's words are much more crucial to the success of a news story than the word processing program he used to type it out. In the same way, your creative efforts to write the content of your website and to design its graphic elements are much more important than the content management system you use to publish it to the Internet. Notice that the above steps 1 through 6 have nothing to do with Ascribe. In order to create any website you will need to invest significant time and creative effort in doing the necessary writing and graphic design required.

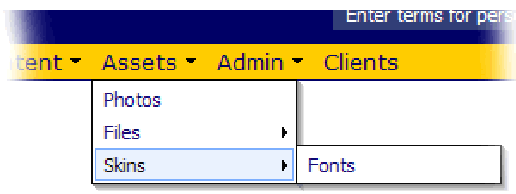
Chapter 7: Skins

Ascribe allows you to configure the look and feel of your website (and even the Ascribe application itself) through the use of skins to configure colors, fonts, files, text styles and HTML templates.

Every installation of Ascribe comes “factory installed” with two skins: Ascribe and Elim. The Ascribe skin is used to manage the look and feel of the Ascribe intranet application. The Elim skin is a sample skin for a website. You can use the Elim skin as a starting point for making skins for your own website.

Finding the module

The **Skins** module is found on the main menu under **(Digital) Assets.**



Brand the Ascribe with your church logo and colors

You can edit the Ascribe skin to change the look and feel of the Ascribe intranet application to match your church’s logo, color scheme and preferred fonts.

Customize the masthead

By default, your Ascribe installation comes with an Ascribe logo in the navy blue bar (or masthead) at the top of every screen inside the Ascribe intranet application. Here is the default masthead graphic:

Change the color of the masthead

1. Go to the skins module and click the button for the Ascribe skin.

2. Scroll down to the **Masthead** section. Click the button to pick a new background color. Otherwise, if you know the hexadecimal value of the color you wish to use, enter it into the **Background Color** field.

3. For the new background color to take effect you must publish the skin by clicking on the **Publish Skin** button.

Change the masthead graphic

1. Using a graphics program such as Macromedia Fireworks or Adobe Photoshop, you can create your own masthead graphic which has your church logo and tagline. Create a graphic is the GIF format with dimensions of 390 x 41 pixels. Make sure the background color of the new masthead graphic matches the background color set for the masthead.

2. Go to the skins module and click the **File Manager** icon for the Ascribe skin.

3. You will see a listing of all the files in the top directory of this files folder for the Ascribe skin. Scroll down until you find the file named `logo.gif` and click it.

4. Click the **Browse…** button for the **Replace this file** section. Locate your new masthead graphic.

5. Click the Upload New File button.

Setting the church logo for printed reports

Printable HTML reports and the tax-deductible giving statements in the PDF format include a logo for your church. This logo must be found in the **Default Skin for Internet and Extranet Pages** with a file name of `print_logo.png`.

1. Create the church logo and save it as a **PNG 8** graphic file.

2. Determine which skin is the Default Skin for Internet and Extranet Pages by going to the skins module and click on the Ascribe Skin Configuration button. Note which skin is selected for the **Default Skin for Internet and Extranet Pages**.

3. Go to the skins module and click the **File Manager** icon for that Default Skin for Internet and Extranet Pages.

4. Find the file named named `print_logo.gif` and click it.

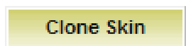
5. Click the **Browse…** button for the **Replace this file** section. Locate your prepared church logo graphic in the **PNG 8** format.

6. Click the Upload New File button.

Cloning a skin

A skin contains a LOT of information: many color settings, to HTML templates, unlimited files in a directory structure, font settings, unlimited CSS text styles and menu settings.

Because so many elements are involved when building a skin, it is best to clone an existing skin rather to create one from scratch.

1. Go to the skins module and click on the  icon for the skin you wish to clone.
2. Click the  **Clone** button.
3. Type in a name for the new skin.
4. Click the  button.
5. To go to the cloned skin, click on the name of the skin record displayed.

Templates

An Ascribe template is a HTML document which contains curly-brace field placeholders. These templates are used to define the structure and format of your web page. The templates portion of building a skin requires knowledge of HTML. Alternatively, you can design web pages using a web development tool such as Macromedia Dreamweaver and export the HTML for use in Ascribe. However, template development still requires some familiarity with HTML.

TIP: *If you do not know what HTML looks like, open your browser and right-click anywhere on the page. Select "View Page Source" or "View Source". You'll see the HTML code which defines the format of the page.*

The following is a listing of the ten different templates which can be set for each skin:

- **Internet** – for regular public webpages
- **Extranet** – for private pages which require members to login
- **Login** – login form for private extranet pages
- **Logout** – page to show upon logging out from the extranet
- **Email** – for some automatic emails sent out by Ascribe
- **Print** – print versions of webpages
- **Popup** – for popup windows
- **Unavailable** – page to show when the website is unavailable
- **Section Header** – partial page portion just for a section header
- **Sub-Section** – partial page portion for a sub-section

Supported document types

Ascribe only supports HTML templates. XHTML templates are not supported. The first line of tall the templates (except for the Section Header and Sub-Section templates) should include a DOCTYPE definition in the first line of the template. Ascribe supports the following DOCTYPE:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"
"http://www.w3.org/TR/html4/loose.dtd">
```

Character Set Encoding (UTF-8)

Ascribe uses Unicode encoding. For all pages that it publishes, Ascribe will automatically add the following line to the head tag which sets the page to the UTF-8 character set:

```
<meta http-equiv="Content-Type" content="text/html;charset=utf-8">
```

For this reason, do not explicitly set the page encoding to any character set in any template.

Unicode was selected as the supported character set in order to accommodate script in multiple languages, such as Chinese, Korean and Japanese characters.

Internet template

This template is used for public web pages.

The first line of the template should be the HTML 4.01 Transitional DOCTYPE definition.

The following curly-brace field placeholders can be used in the Internet template:

- `{site_name}`
- `{page_headline}`
- `{copyright_notice}`
- `{title_tag}`
- `{meta_description}`
- `{meta_keywords}`
- `{head}`
- `{body}`
- `{breadcrumb_nav}`
- `{main_nav}`
- `{sub_nav}`
- `{related_nav}`
- `{module_nav}`
- `{email_link}`
- `{print_link}`
- `{content}`
- `{page_skin_name}`

Here is an extremely simplified example of an Internet template:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"
"http://www.w3.org/TR/html4/loose.dtd">
<html>
    <head>
        <title>{title_tag}</title>
        <meta name="description" content="{meta_description}">
        <meta name="keywords" content="{meta_keywords}">
        {head}
    </head>
    <body {body}>
        <p>{breadcrumb_nav}</p>
        <p>{main_nav}</p>
        <p>{sub_nav}</p>
        <p><big>{page_headline}</big></p>
        <p>{content}</p>
        <p>{copyright_notice}</p>
    </body>
</html>
```

Notice that `{title_tag}` placeholder goes between the title tag, which is nested inside the head tag. The `{head}` placeholder falls inside the head tag, while the `{body}` placeholder is in the parameter section of the body tag.

The `{breadcrumb_nav}`, `{main_nav}`, `{sub_nav}`, `{related_nav}`, `{module_nav}`, `{email_link}` and `{print_link}` placeholders are all defined by the navigation menu settings for this skin.

The `{content}` placeholder is where the main content goes for the page.

Extranet template

This template is used for private web pages which require members to log in. After they have logged in, they will see pages displayed using the Extranet template.

The first line of the template should be the HTML 4.01 Transitional DOCTYPE definition.

In addition to the curly-brace field placeholders available to the Internet template, the following placeholders are also to be used in the Extranet template:

- `{left_top_message}`
- `{right_top_message}`

The `{left_top_message}` will be a greeting to the user, a link to the **My Preferences** page and the logout link. The `{right_top_message}` will be a timestamp and possibly a link to a help note.

Login template

This template is used for displaying the login form to ask members to login before accessing private web pages (i.e., the extranet).

The first line of the template should be the HTML 4.01 Transitional DOCTYPE definition.

The login template accepts these curly-brace placeholders:

- `{site_name}`
- `{page_headline}`
- `{copyright_notice}`
- `{title_tag}`
- `{head}`
- `{body}`
- `{breadcrumb_nav}`
- `{main_nav}`
- `{sub_nav}`
- `{login_form_hidden_vars}`
- `{login_form_action}`
- `{on_login_form_submit}`
- `{img_logo}`
- `{login_welcome}`
- `{username_str}`
- `{password_str}`
- `{username_existing}`
- `{password_existing}`
- `{login_str}`
- `{forgot_password_link}`
- `{login_compatibility_msg}`
- `{copyright_notice}`
- `{page_skin_name}`

Here is a simple example of a login template:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"
"http://www.w3.org/TR/html4/loose.dtd">
<html>
<head>
    <title>{title_tag}</title>
    {head}
</head>
<body>
    <p><a href="{client_url}"><img
src="{client_private_url}skins/{page_skin_name}/files/site_logo.png" border=0></a></p>
    <p>{breadcrumb_nav}</p>
    <p>{main_nav}</p>
    <p>{sub_nav}</p>
    <p><big>{page_headline}</big></p>
    <div>
        <form name="login" action="{login_form_action}" method="POST" {on_login_form_submit}>
```

```
        {login_form_hidden_vars}
        <p>{img_logo}</p>
        <p>{login_welcome}</p>

        <table>
            <tr><td></td><td>{invalid_login_msg}</td></tr>
            <tr valign="top">
                <td align=right style="padding-right: 10px;"><b>{username_str}:</b></td>
                <td><input type="text" name="username" value="{username_existing}" size="13"
maxlength="32"></td>
            </tr>
            <tr valign="top">
                <td align=right style="padding-right: 10px;"><b>{password_str}:</b></td>
                <td><input type="password" name="password" value="{username_existing}"
size="13" maxlength="32"></td>
            </tr>
            <tr><td></td><td style="padding-top: 5px;"><input type="submit"
value="{login_str}"  class="asc_button_form" onmouseover="className='asc_button_form_hover';"
onmouseout="className='asc_button_form';"></td></tr>
        </table>
    </div>
    <p>{forgot_password_link}</p>
    <p>{copyright_notice}</p>
</body>
</html>
```

Be sure to add the `{head}` placeholder in the head tag. Ascribe will add some special code which will detect the member's timezone in the world to properly display a timestamp according to the member's proper timezone.

Logout template

This template is used for displaying the logout confirmation page after a member logs out of the extranet.

The first line of the template should be the HTML 4.01 Transitional DOCTYPE definition.

The logout template accepts these curly-brace placeholders:

- {site_name}
- {page_headline}
- {copyright_notice}
- {title_tag}
- {head}
- {breadcrumb_nav}
- {main_nav}
- {sub_nav}
- {seconds_to_forward_logout_to_login}
- {logout_str}
- {logout_thank_you_msg}
- {img_logo}
- {logout_forward_msg}
- {copyright_notice}
- {page_skin_name}

Here is a simple example of a logout template:

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN"
"http://www.w3.org/TR/html4/loose.dtd">
<html>
<head>
    <title>{title_tag}</title>
    {head}
    <META HTTP-EQUIV="refresh" CONTENT="{seconds_to_forward_logout_to_login}; URL=login.php">
</head>
<body>
    <p><a href="{client_url}"><img
src="{client_private_url}skins/{page_skin_name}/files/site_logo.png" border=0></a></p>
```

```
    <p>{breadcrumb_nav}</p>
    <p>{main_nav}</p>
    <p>{sub_nav}</p>
    <h1>{logout_str}</h1>
    <p>{logout_thank_you_msg}</p>
    <p>{logout_forward_msg}</p>
    <p>{copyright_notice}</p>
</body>
</html>
```

Notice the “refresh” meta-tag in the above example. This template is set to automatically forward itself to the login form after a set number of seconds.

To change the number of seconds for the `{seconds_to_forward_logout_to_login}` placeholder, go to **Admin > Application Settings** on the main menu bar. Click on the **Session** tab and edit the **Logout Page Duration** value.

Email template

The email template of the **Default Skin for Internet and Extranet Pages** is used for sending out automatic email messages such as password notifications and alerts such as mentor assignments in the discipleship module. You should customize this email template to reflect the logo and color scheme of your church.

The email template accepts these curly-brace placeholders:

- `{email_body}`
- `{page_bgcolor}`
- `{function_button_color}`
- `{line_color}`
- `{font_1_name}`
- `{font_2_name}`
- `{head}`
- `{client_private_url}`
- `{public_skin_name}`

Here is a simple example of an email template:

```
<html>
<head>
<style><!--
body,td,a,p,{font-family:tahoma,arial,sans-serif;font-size: x-small;}
table{color:#0000cc;text-decoration: none;}
td.email_body{color:#0000cc; text-decoration: none;border-collapse: collapse ; border: 1px
solid #000000; padding: 12px;}
//-->
</style>
{head}
</head>
<body bgcolor="{function_button_color}">
<br>
<table border="0" width="85%" cellpadding="0" cellspacing="0" align=center valign=middle>

<tr><td><img src="{client_private_url}skins/{public_skin_name}/files/logo.gif"
border=0><br><br></td></tr>

<tr><td class=email_body bgcolor="{page_bgcolor}">{email_body}</td></tr>
</table>
</body>
</html>
```

Print template

If you add the `{print_link}` placeholder to your internet template (and you have the email and print link templates defined in the Navigation section of the skin) or the `{printer_friendly_URL}` placeholder to a news feed template, Ascribe will include a link to a printer-friendly version of web pages or news articles. The print template is used for generating these printer-friendly versions of your web pages and articles.

The email template accepts these curly-brace placeholders:

- `{title_tag}`
- `{head}`
- `{copyright_notice}`
- `{page_headline}`
- `{content}`
- `{logo_bw_large}`
- `{logo_bw_small}`
- `{link_to_page}`

Here is a simple example of a print template:

```
<html>
<head>
<title>{title_tag}</title>
{head}
</head>
<body bgcolor="#FFFFFF" >
<div style="padding: 20px; width: 582px;">
<p>{logo_bw_large}</p>
<p><big>{page_headline}</big></p>
<p>{content}</p>
<div class=tiny style="border-top: 1px solid {line_color}; margin-top: 20px; padding-top:
10px;">{logo_bw_small}{copyright_notice}<br>{link_to_page}</div>
</div>
</body>
</html>
```

Menu Navigation

Email and Print Page Links

Email Link Template

The email link template accepts these curly-brace placeholders:

- `{page_id}`
- `{client_private_url}`
- `{page_skin_name}`
- `{ascribe_client_url}`
- `{email_title}`

Here is a simple example of an email link template:

```
<a href="{ascribe_client_url}sp.php?action=email_form&page_id={page_id}"><img
src="{client_private_url}skins/{page_skin_name}/files/icons/16x16/email.gif" border="0">
{email_title}</a>
```

In order for this link to work properly, the `href` parameter of the `a` tag must be: `{ascribe_client_url}sp.php?action=email_form&page_id={page_id}`. But you may change out the graphic or anything else.

Print Page Template

The print page link template accepts these curly-brace placeholders:

- `{page_id}`
- `{client_private_url}`
- `{page_skin_name}`
- `{ascribe_client_url}`
- `{print_title}`

Here is a simple example of a print page link template:

```
<a href="{ascribe_client_url}sp.php?action=print&page_id={page_id}" target="_blank"><img
src="{client_private_url}skins/{page_skin_name}/files/icons/16x16/printer.gif" border="0">
{print_title}</a>
```

In order for this link to work properly, the `href` parameter of the `a` tag must be: `{ascribe_client_url}sp.php?action=print&page_id={page_id}`. But you may change out the graphic or anything else.