The Organized Church

because stewardship is about more than money

MinistryManager

Advanced User Manual v.3.5

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UNDERSTANDING ROLES

The system offers different permissions within Ministry Manager, including whether you can see servants, edit ministries, run reports, etc. A grouping of these permissions is called a "role". By default we offer six roles, each with a unique set of permissions. You can modify these roles or even create new ones by working with a member of The Organized Church staff.

When you create a servant in the system you must assign him a role so he has the proper permissions needed to use the system. It is therefore important to understand what each role can do before reviewing the more advanced features of the system. Here is an overview of the default roles and their intended use:

Guest: Intended for guest users of the system. Typically this access is quite limited.

Member: Usually assigned to members or regularly attending visitors of the church.

Ministry Leader: Lay members responsible for leading one or more ministries.

Staff Contact: Staff members of the church responsible for overseeing one or more ministries.

Leadership: Church leadership, whether pastors, senior administrators, or lay leaders.

Maintenance: Lay members or church staff responsible for the spiritual gifts ministry of the church. This group oversees data entry into system, provides end user help, and performs various administrative functions like managing keyword lists.

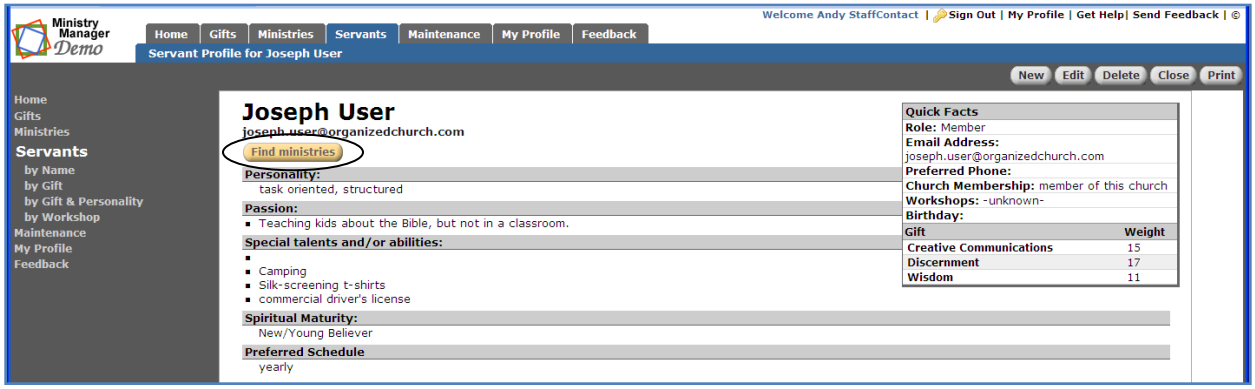
For a more detailed look at the capabilities of each role, please review the **Detailed Breakdown of Roles and Capabilities** table on the following page.

DETAILED BREAKDOWN OF ROLES AND CAPABILITIES

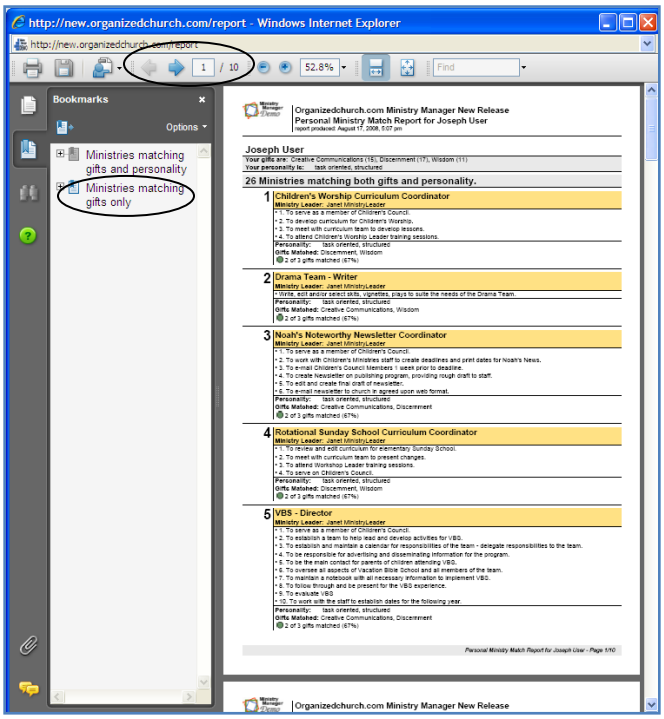
Capabilities	Guest	Member	Ministry Leader	Staff Contact	Leadership	Maintenance
View gifts	•	•	•	•	•	•
View ministries	•	•	•	•	•	•
View own servant profile		•	•	•	•	•
View all servant profiles				•	•	•
View feedback					•	•
View ministry leader info		•	•	•	•	•
View staff contact info		•	•	•	•	•
Edit gifts						•
Edit ministries			•	•	•	•
Edit own servant profile		•	•	•	•	•
Edit all servant profiles				•	•	•
Create gifts						•
Create ministries						•
Create servants						•
Create feedback	•	•	•	•	•	•
Delete gifts						•
Delete ministries						•
Delete servants						•

Capabilities	Guest	Member	Ministry Leader	Staff Contact	Leadership	Maintenance
Delete feedback						●
View unpublished ministries			●	●	●	●
Run “Find Ministry” Reports				●	●	●
Run “Find Servants” Reports			●	●	●	●
Print Ministry Books			●	●	●	●
View Maintenance page						●
View keywords records						●
Edit keywords records						●
Create keywords records						●
Delete keywords records						●
Rename keywords records						●
Reassign Ministries						●
Reset others’ passwords						●

RUNNING THE "FIND MINISTRIES" REPORT



If you have permission to run the "Find Ministries" report, you can do so on any servant. Once you sign into the system, click on the **Servants** tab at the top of the screen or the **Servants** link at the left of the screen. Click on the servant of your choice. When the Servant Profile appears, click the **Find Ministries** button.

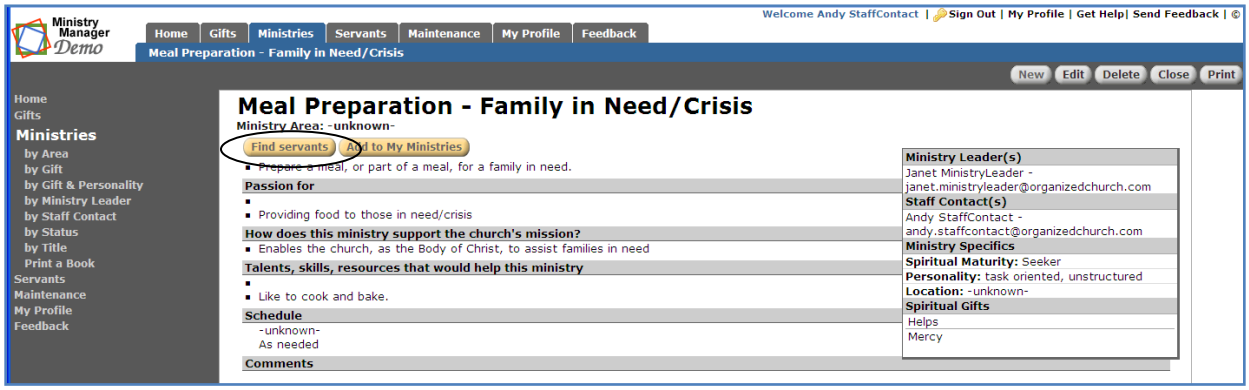


The system will open a new window displaying an Adobe Acrobat report listing the ministries that match the servant's gifts and personality. You can also view a report that matches only the servant's gifts by clicking on the **Ministries matching gifts only** link at the left of the screen.

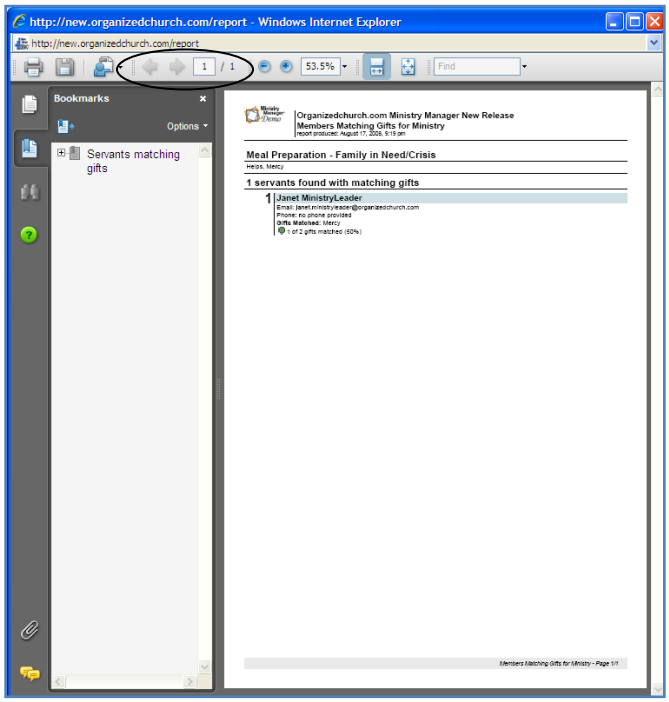
Advance through the pages by clicking on the arrows at the top of the screen or by scrolling down the page.

You can save this report to your computer, attach it to an email and send it to the servant, or rerun the report as often as you like.

RUNNING THE "FIND SERVANTS" REPORT



If you have permission to run the "Find Servants" report, you may do so on any ministry. Once you sign into the system, click on the **Ministries** tab at the top of the screen or the **Ministries** link at the left of the screen. Click on the ministry of your choice. When the Ministry Profile appears, click the **Find Servants** button.

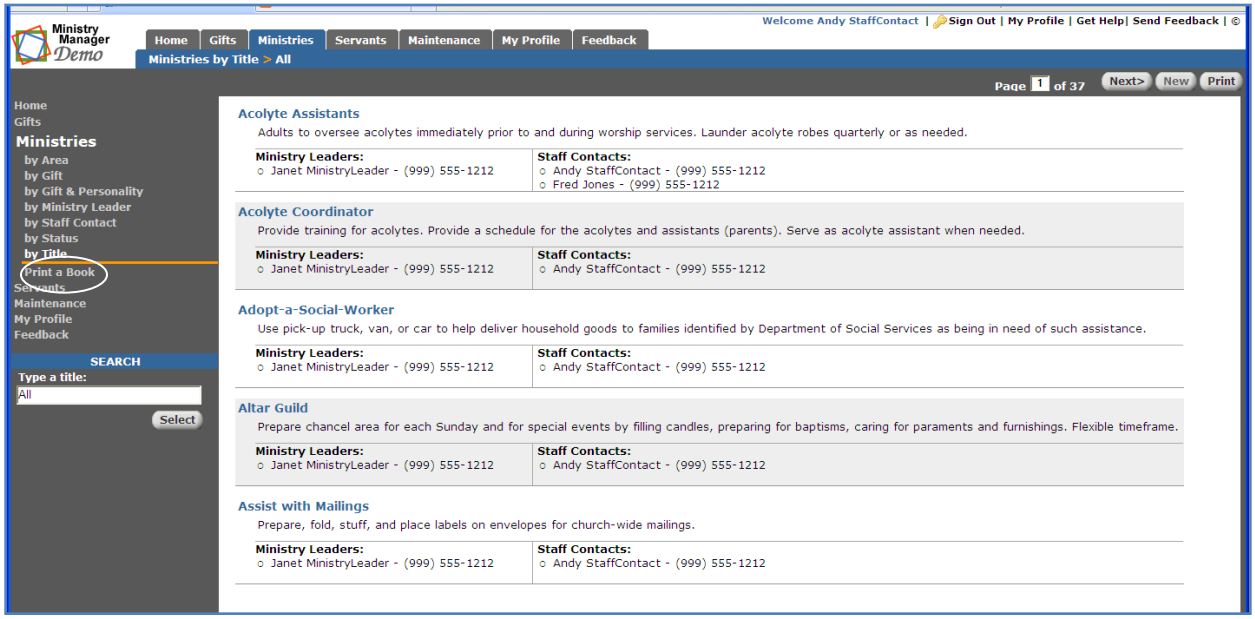


The system will open a new window displaying an Adobe Acrobat report listing the servants that have the gifts indicated for this ministry.

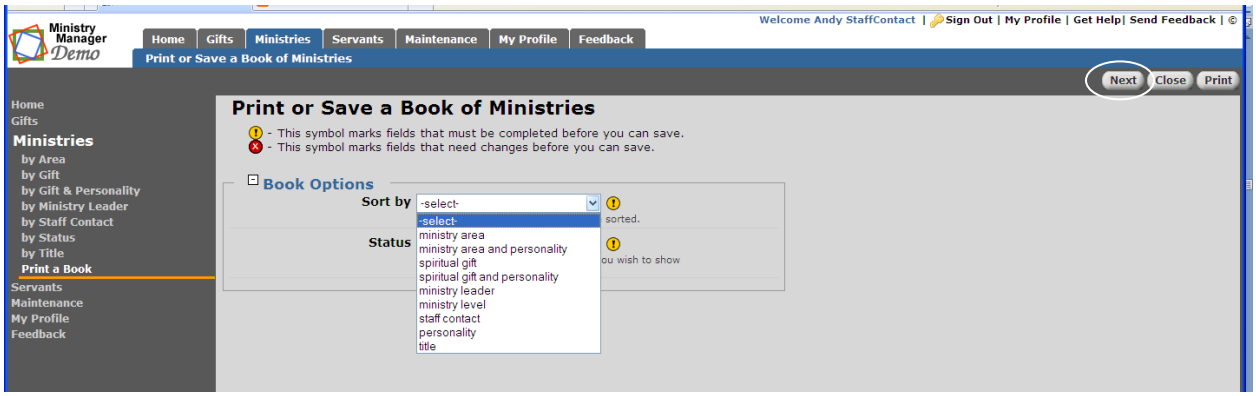
Advance through the pages by clicking on the arrows at the top of the screen or by scrolling down the page.

You can save this report to your computer, attach the file to an email and send it to the ministry leader, or rerun the report as often as you like.

PRINTING A BOOK

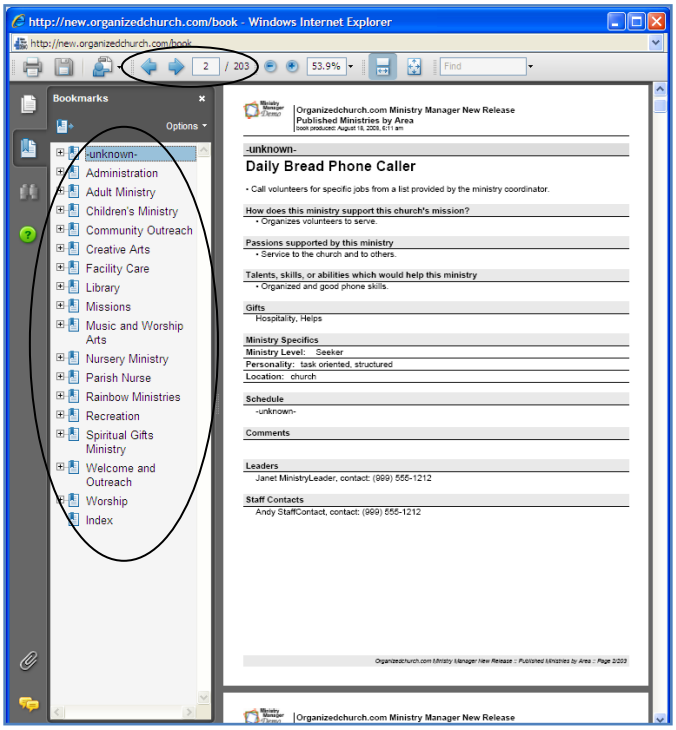


If you have permission to "Print a Book," you can create a report of the church's ministries. Once you sign into the system, click on the **Ministries** tab at the top of the screen or the **Ministries** link at the left of the screen. Then click on the **Print a Book** link.



The **Print or Save a Book of Ministries** screen will appear. You will have to choose a value to **Sort by**, such as Ministry Area, Spiritual Gifts, Ministry Leader, etc. You will then need to select a ministry **Status** for the book, choosing Ministries still in Draft form, Ministries that have become inactive or Withdrawn, or Published Ministries.

Once you have selected your book criteria, click the **Next** button to generate your book.

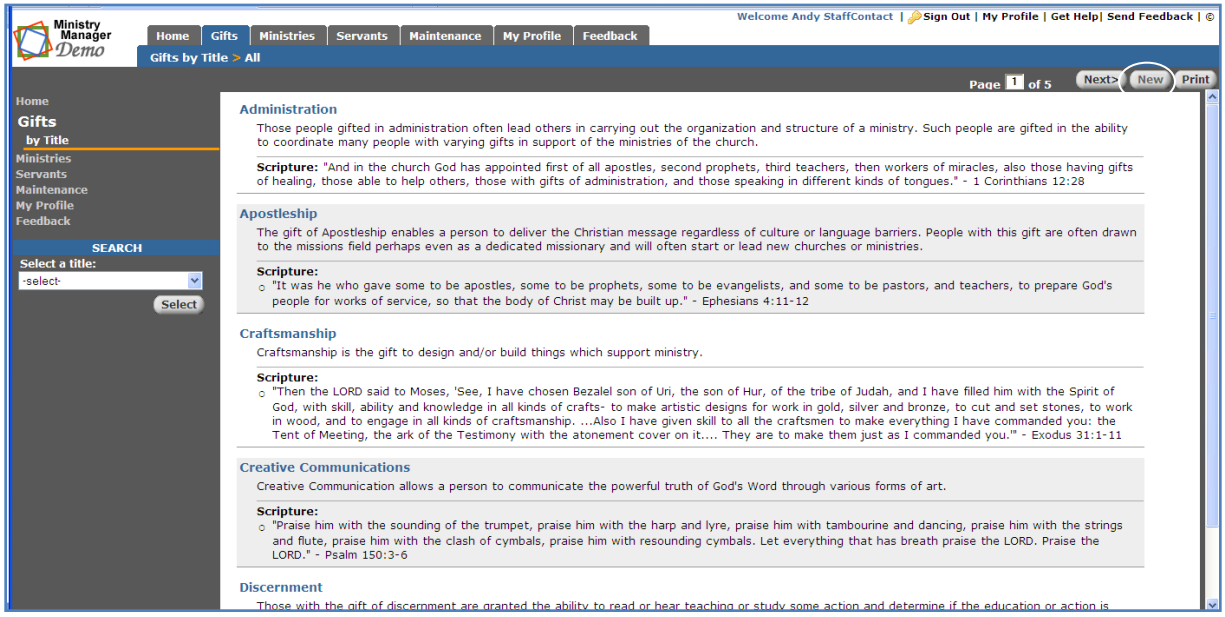


The system will open a new window displaying an Adobe Acrobat book listing Ministries sorted by your criterion. The book shown at the left is sorted by Ministry Area.

Advance through the pages by clicking on the arrows at the top of the screen or by scrolling down the page. You may also use the navigation bar at the left side of the screen to click on the Ministry Area of your choice.

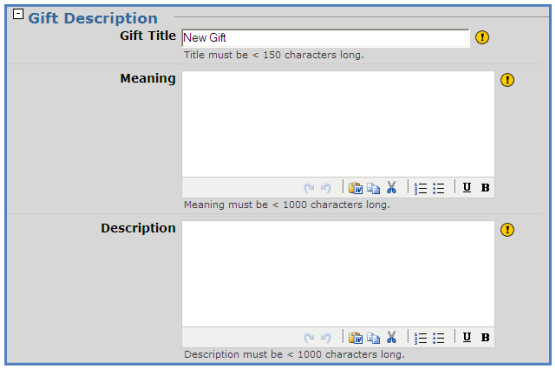
You can print this book, save it to your computer, attach the file to an email and send it, or rerun the book as often as you like with different Search criterion. You may wish to keep a printed copy at your church's welcome center for servants without internet access who want to explore your church's ministry options.

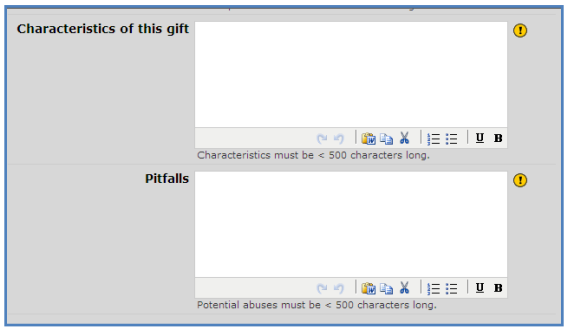
CREATING A NEW GIFT



If you have permission to create a gift, you may create a new spiritual gift profile. To create a new gift, click on the **Gifts** tab at the top of the page or click on the **Gifts** link at the left of the page. Then click on the **New** button. The **New Gift Profile** page will appear.

Gift Description Section:





Gift Title: The name of this spiritual gift.

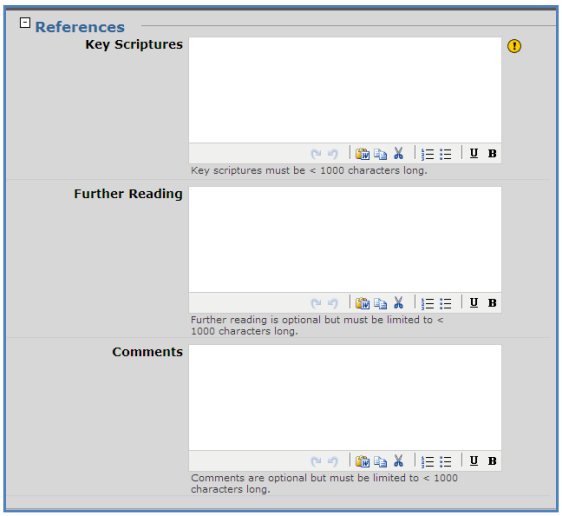
Meaning: The literal meaning of the word.

Description: A more detailed explanation of this gift and how it manifests itself within the church.

Characteristics of this gift: Traits that servants with this gift exhibit.

Pitfalls: Potential negative traits that servants with this gift could exhibit.

References Section:



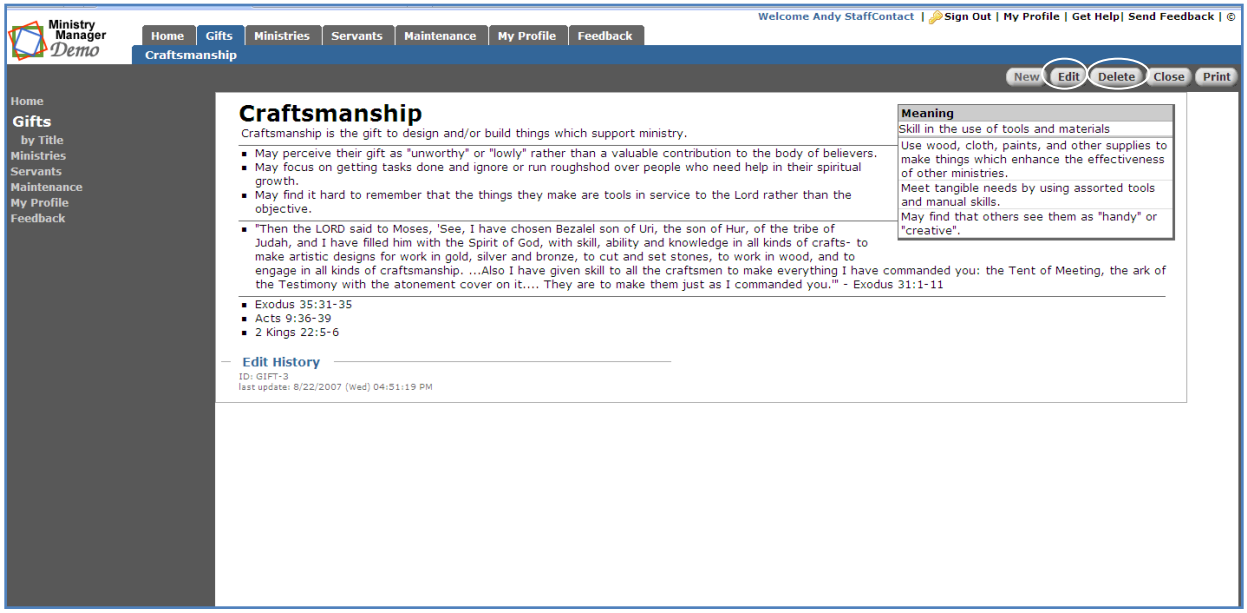
Key Scriptures: Major Bible verses that identify this spiritual gift.

Further Reading: Additional Bible verses relating to this gift, or other materials that may be helpful to someone possessing this gift.

Comments: Any additional information necessary about this gift.

When you have completed the spiritual gifts profile to your satisfaction, click on the **Save** button at the top right of the screen. Please note that if you click the **Close** button without saving, the system will not save any of your changes. Once saved, your gift will now appear on the **Gifts** screen.

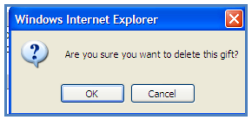
EDITING OR DELETING A GIFT

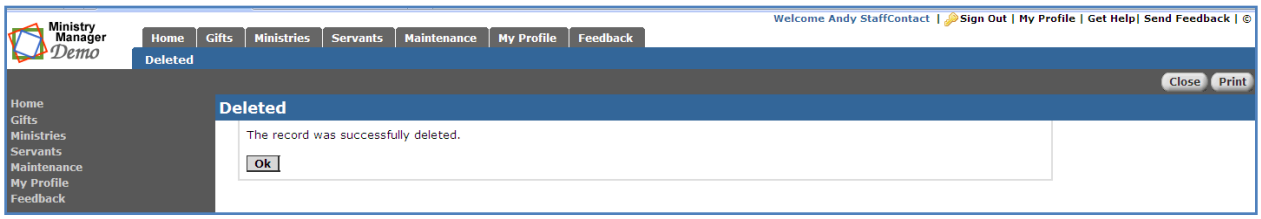


If you have permission, you may Edit or Delete a Spiritual Gift. Click on the **Gifts** tab at the top of the page or click on the **Gifts** link at the left of the page. Then click on the desired gift. Once the Gift Profile appears, either click on the **Edit** or **Delete** button at the top right of the page.

If you choose to edit the gift, when you click the button the Gift Profile page will appear, and you will be allowed to make your changes. (See "Creating a New Gift" on page 10.) Please note that after making your changes you must click the **Save** button to save your changes. If you click the **Close** button without saving, your changes will be lost.

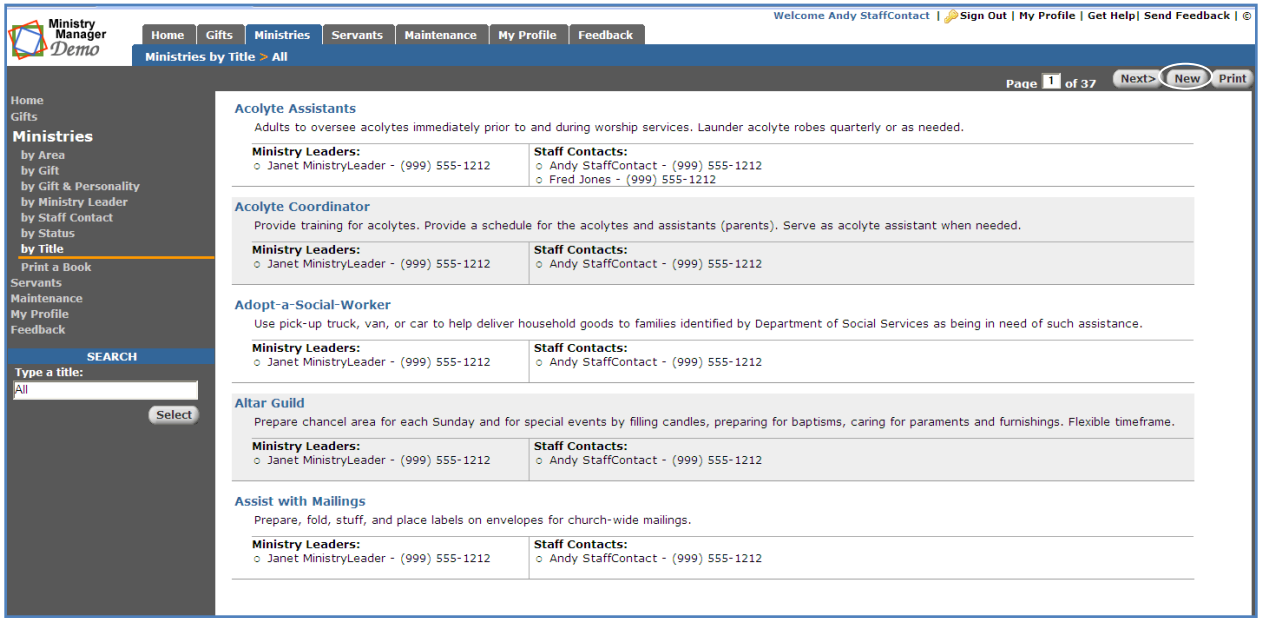
If you choose to delete the gift, click on the **Delete** button. A confirmation dialogue box will ask "Are you sure you want to delete this gift?" Click **OK** if you wish to proceed or **Cancel** if you wish to keep the gift.





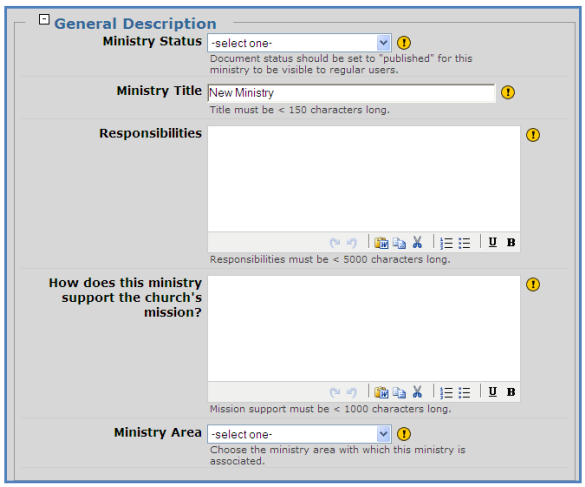
If you proceed, a screen will indicate "The record has been successfully deleted," and the system will then return you to the Gifts page.

CREATING A NEW MINISTRY



If you have permission, you may create a new ministry. To create a new ministry, click on the **Ministries** tab at the top of the page or click on the **Ministries** link at the left of the page. Then click on the **New** button. The **New Ministry Profile** page will appear.

General Description Section:



Ministry Status: Allows you to control when the ministry appears on the system to the church at large. The "draft" status indicates the document is in process and is only visible to those with Maintenance roles. The "published" status indicates the ministry document is complete and allows everyone to view it. The "withdrawn" status indicates that the ministry, while accurate, is no longer being offered at the church. Some churches opt to change the seasonal ministries back to "withdrawn" after the season has passed, but we recommend leaving those ministries available for people to consider year round.

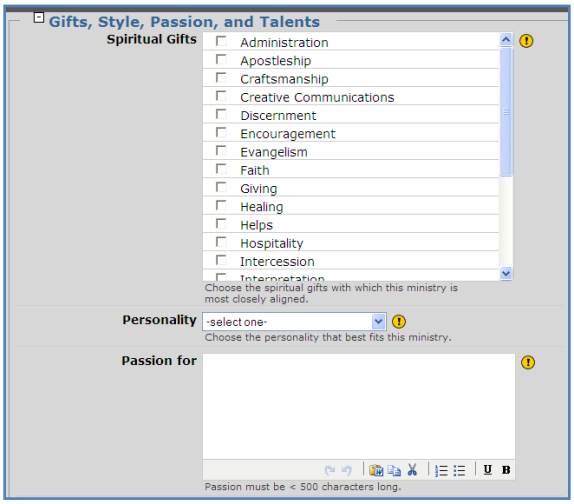
Ministry Title: A concise 2-5 word description of the ministry.

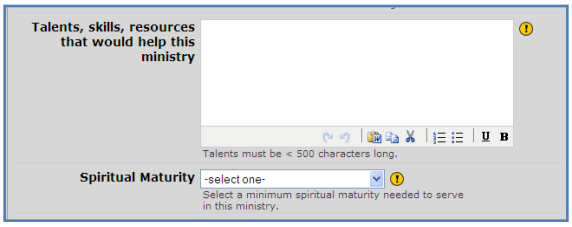
Responsibilities: A description of the ministry, accompanying responsibilities, and time commitment. We suggest you avoid acronyms or at least explain them.

How does this ministry support the church's mission?: The reason your church chose to engage in this ministry and your vision of how it supports the goals of the church.

Ministry Area: The department area of the church responsible for this ministry. The choices come from the "Ministry Area" list under the **Maintenance** tab.

Gifts, Style, Passion, and Talents Section:





Spiritual Gifts: The spiritual gifts associated with this ministry. You may select more than one gift. The choices come from the Spiritual Gifts Profiles entered on the Gifts page.

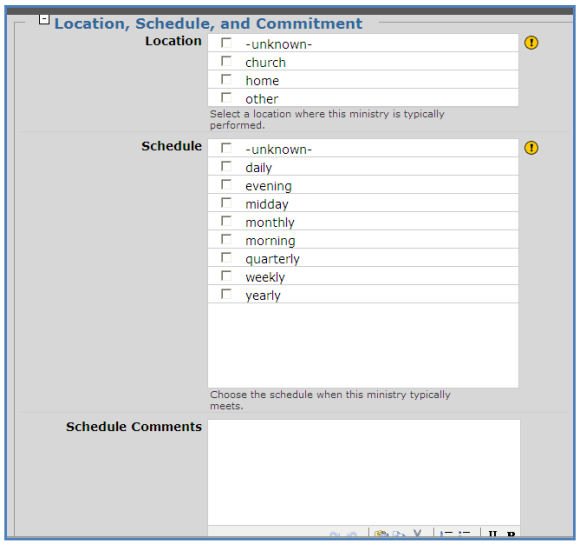
Personality: The personality, temperament, or personal style best suited for this ministry. The choices come from the "Personality" list under the **Maintenance** tab.

Passion: Any passions or underlying issues that might lead a servant to serve in this ministry.

Talents, skills, resources that would help this ministry: Any talents (e.g, piano playing), skills (e.g, woodworking), or resources (e.g, farmland, a boat, etc.) that would help someone be particularly effective in this ministry.

Spiritual Maturity: The minimum spiritual maturity needed to serve in this ministry. Some ministries may require more seasoned Christians than others. The choices come from the "Spiritual Maturity" list under the **Maintenance** tab.

Location, Schedule, and Commitment Section:

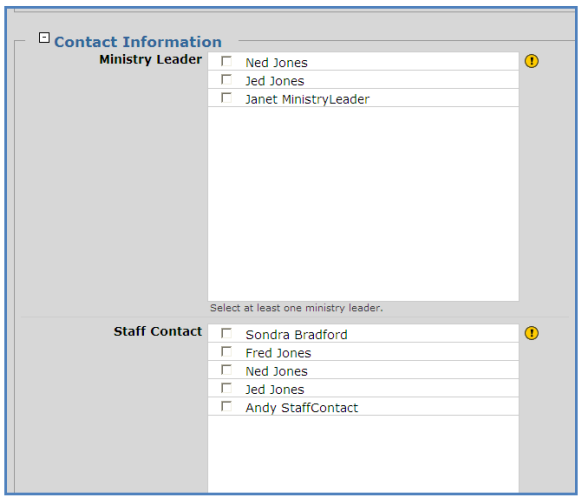


Location: The place where this ministry is typically performed. You may select multiple locations. The choices come from the "Ministry Location" list under the **Maintenance** tab.

Schedule: The frequency of this ministry. The choices come from the "Ministry Timeframe" list under the **Maintenance** tab.

Schedule Comments: Any special scheduling considerations that should be taken into account when serving in this ministry.

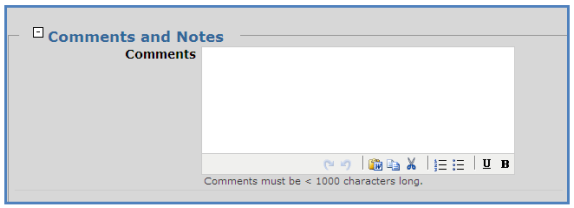
Contact Information Section:



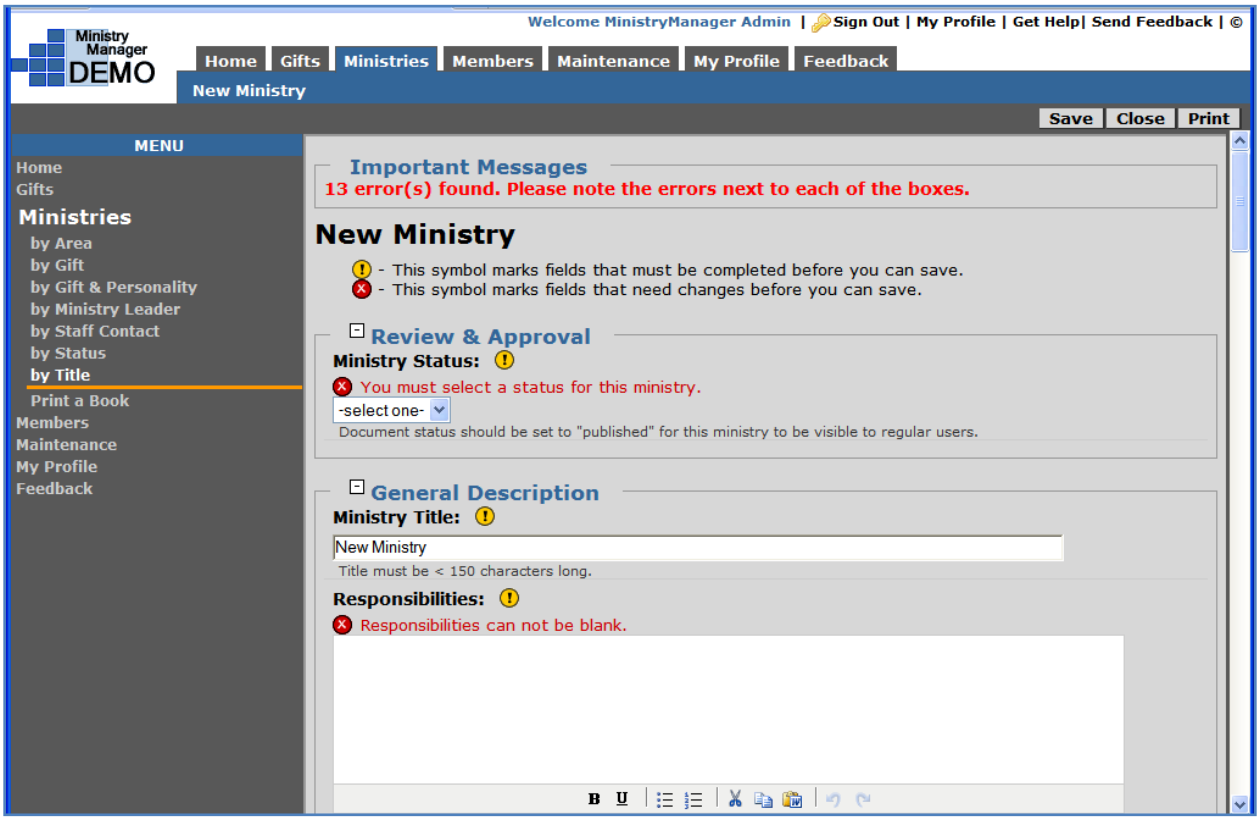
Ministry Leader: The person (or people) who lead this ministry, typically lay leaders but sometimes church staff members. The choices come from the Servant Profiles entered on the Servants page that are marked as ministry leaders. (See "Adding New Servants" on Page 18.)

Staff Contact: The staff contact(s) assigned to mentor and oversee the ministry leader(s) of this ministry. Staff contacts provide vision and continuity as ministry leaders rotate off the ministry. The choices come from the Servant Profiles entered on the Servants page that are marked as staff contacts. (See "Adding New Servants" on Page 18.)

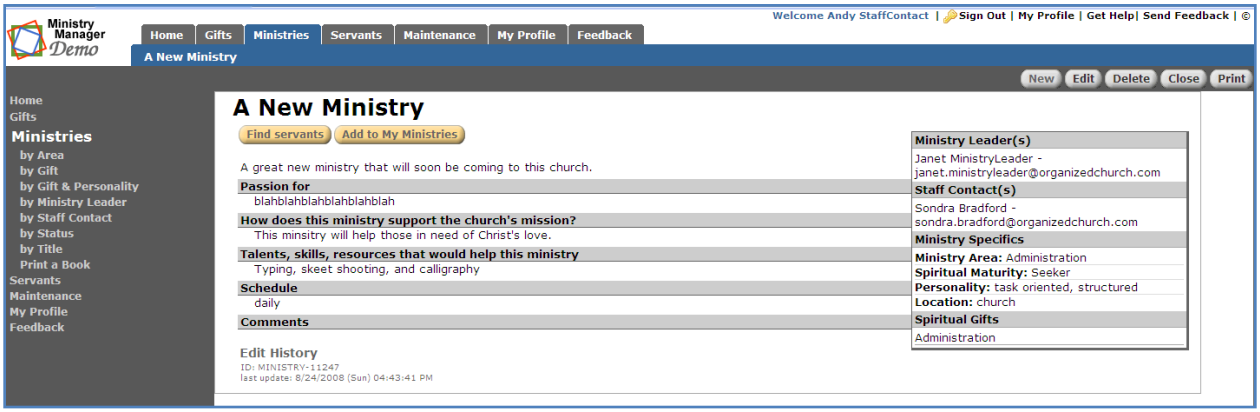
Comments and Notes Section:



Comments: Any additional comments about this ministry that might benefit someone trying to learn more about it.



Once you complete the ministry form, click the **Save** button at the top right of the page. The system will prompt you with red text if you need to fix something, and the red "X" symbol will appear next to any problem fields.



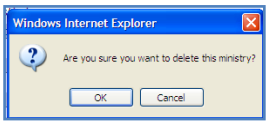
Once you click the **Save** button, the system will display the new Ministry Profile.

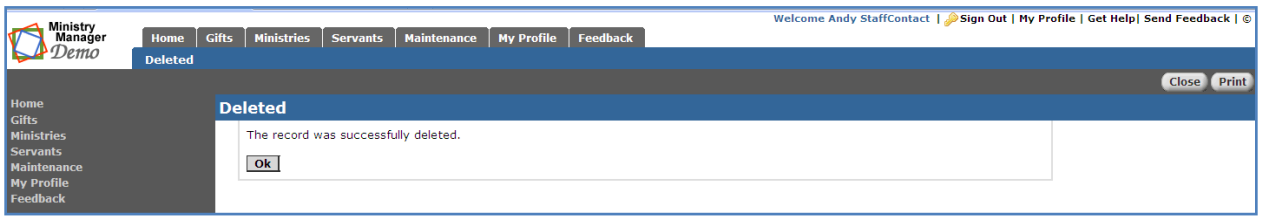
EDITING OR DELETING A MINISTRY

If you have permission, you may Edit or Delete a Ministry. Click on the **Ministries** tab at the top of the page or click on the **Ministries** link at the left of the page. Then click on the desired ministry. Once the Ministry Profile appears, either click on the **Edit** or **Delete** button at the top left of the page.

If you choose to edit the ministry, when you click the button the Ministry Profile page will appear, and you will be allowed to make your changes. (See "Creating a New Ministry" on page 13.) Please note that after making your changes you must click the **Save** button to save your changes. If you click the **Close** button without saving, your changes will be lost.

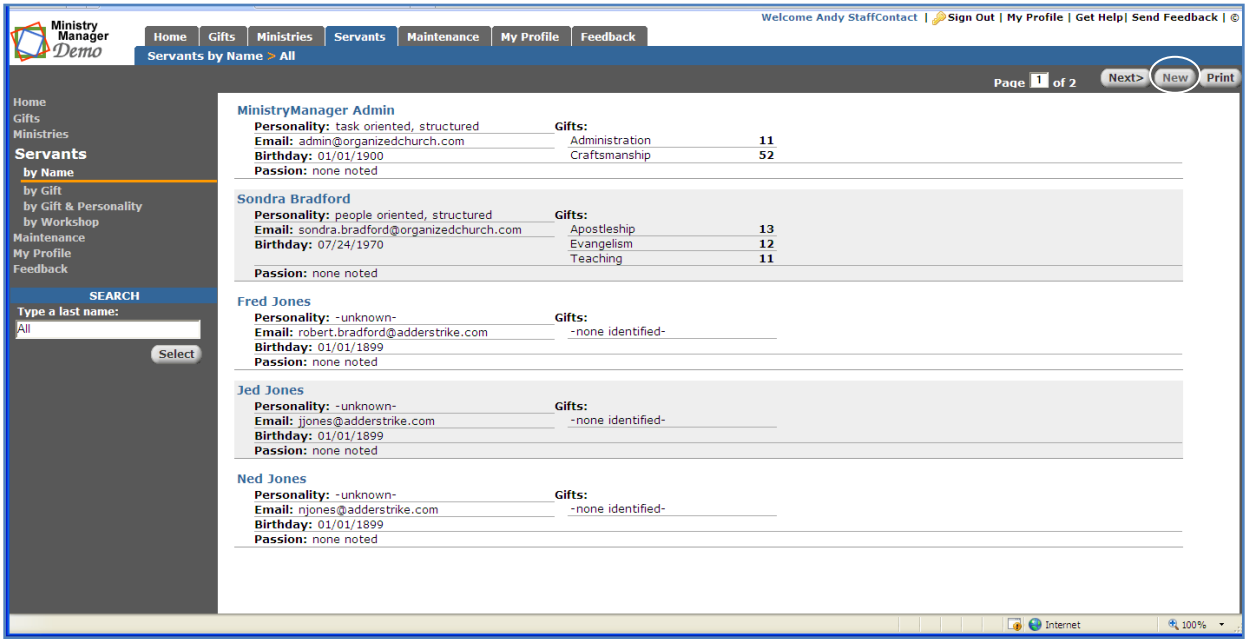
If you choose to delete the ministry, click on the **Delete** button. A confirmation dialogue box will ask "Are you sure you want to delete this ministry?" Click **OK** if you wish to proceed or **Cancel** if you wish to keep the ministry.





If you proceed, a screen will indicate "The record has been successfully deleted," and the system will then return you to the Ministries page.

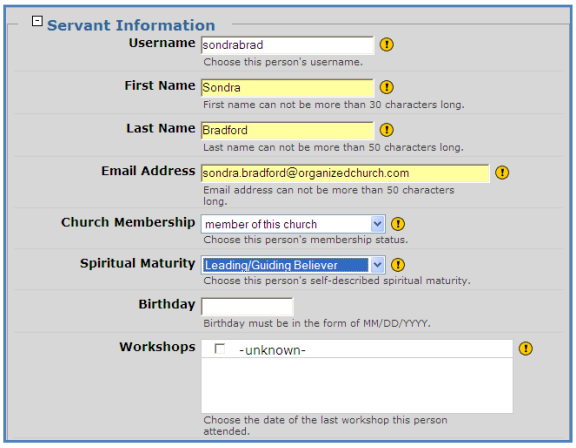
ADDING NEW SERVANTS



If you have permission, click on the **Servant** tab at the top of the page or click on the **Servant** link at the left of the page. Then click on the **New** button. The **New Servant Profile** page will appear. (You may also add new servants by going to the Maintenance page, choosing a way to list servants in the **Servants** box, and then clicking the **New** button. See "Editing or Deleting Servants" on page 22 for more details.)

The yellow "exclamation marks" indicate which fields are required before you can save this new servant.

Servant Information Section:



Username: The name you use to access the website. If you desire, you can use the first character of the servant's first name followed by the servant's full last name (e.g., "John Smith" becomes "jsmith"). Do not use spaces. The system will not allow duplicate usernames and will require you to change a name if it's already taken. In that case, you can add the servant's middle initial to the username (e.g., "John A. Smith" becomes "jasmith").

First Name: The servant's first name. If the person has two names, put them both in the "First Name" field (e.g., "Mary Jane").

Last Name: The servant's last name. If the servant has two first names (e.g., "Mary Jane"), put them both in the "First Name" field. Putting a middle name in the "Last Name" field will cause the servant to display under his or her middle name, making it difficult to find him or her.

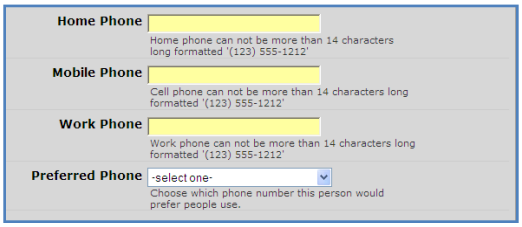
Email Address: The email address where system messages will be sent to the servant. Not everyone has an email address, so this information is technically not required, but it is strongly encouraged since without it servants will not be able to receive password resets, updates to their list of matching ministries, etc. Please contact The Organized Church if you need help obtaining free email accounts for your servants.

Church Membership: Indicates the servant's member status. The choices come from the "Membership Status" list under the **Maintenance** tab.

Spiritual Maturity: Indicates the progression of the servant's walk with Christ. The choices come from the "Spiritual Maturity" list under the **Maintenance** tab.

Birthday: The servant's date of birth. This information can help distinguish servants with the same or similar names. Dates must be entered in MM/DD/YYYY format (e.g., 08/23/1972).

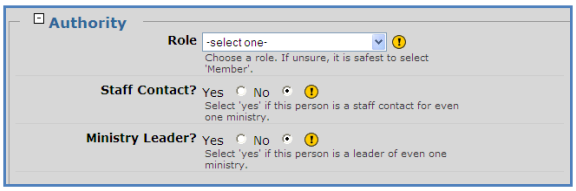
Workshops: The date(s) when the servant took a workshop on spiritual gifts. If your church does not offer workshops, choose "-unknown-". The choices come from the "Workshop Date" list under the **Maintenance** tab.



Home Phone, Mobile Phone, and Work Phone: The servant's contact numbers. While not required, this information is strongly encouraged for a ministry leader or staff contact.

Preferred Phone: The servant's preferred means of contact. If the servant is a ministry leader or staff contact, this is the number the system will display on this servant's ministries. If **Preferred Phone** is left blank, the system will display the home phone for a ministry leader and the work phone for a staff contact. If no numbers are entered, the system will display the church's general phone number on this servant's ministries.

Authority Section:

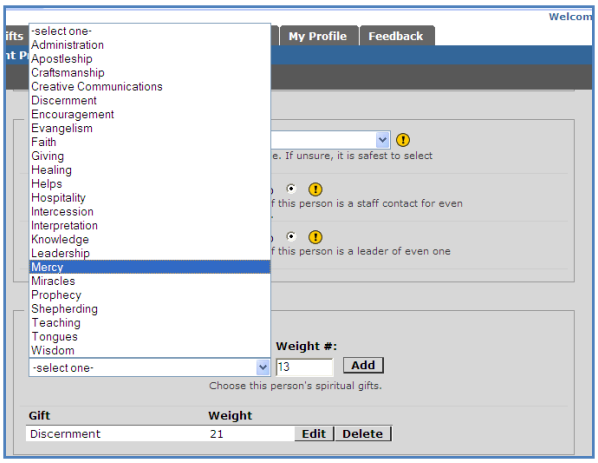


Role: The level of authority you wish to grant this servant. For a detailed explanation of the available Roles, please see "Understanding Roles" on page 3.

Staff Contact?: Indicates whether the servant is a staff contact for any ministry. Selecting "yes" will add this servant as a choice in the Staff Contact list on the Ministry Profile and will add this servant as a choice in the "Search" list when viewing ministries by staff contact.

Ministry Leader?: Indicates whether the servant is a leader of any ministry. Selecting "yes" will add this servant as a choice in the Ministry Leader list on the Ministry Profile and will add this servant as a choice in the "Search" list when viewing ministries by ministry leader.

Gifts Section:



Gifts: The dominant spiritual gift(s) for this servant. You may enter as many as you wish. Choose a gift from the list. Then enter the servant's "Weight #" (i.e., score) for that gift. Click the **Add** button. Repeat this process until you have entered all of the servant's gifts and weights. You may enter "0" for the weight if you know the gifts but not their scores. You may also **Edit** or **Delete** gifts by clicking the appropriate buttons.

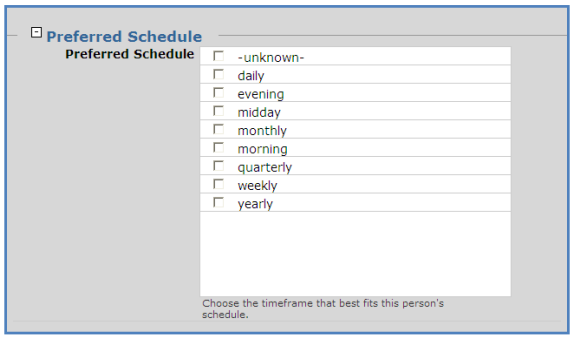
Personality Section:

Personality: The servant's personal style. The choices come from the "Personality" list under the **Maintenance** tab.

Describe your passion: Any passions or issues that drive this servant to serve.

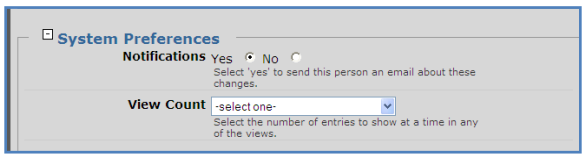
Please list any special talents and/or abilities: Any talents (e.g, piano playing), skills (e.g, woodworking), or resources (e.g, farmland, a boat, etc.) this servant can offer a ministry.

Preferred Schedule Section:



Preferred Schedule: The optimal times this servant may participate. If this servant has not indicated a preferred schedule, choose "-unknown-". The choices come from the "Ministry Timeframe" list under the **Maintenance** tab.

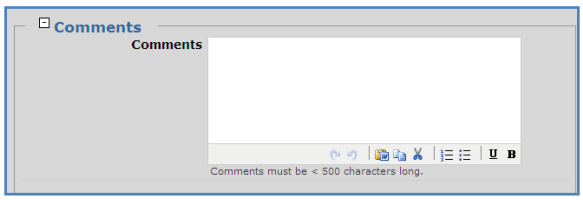
System Preferences Section:



Notifications: Allows you to determine whether or not to alert a servant of the changes you're making to his or her record. You can only see and change this field if you are a member of the Maintenance role.

View Count: Controls how many ministries, gifts, members, etc. should appear on screen at a time for this servant. Although choosing a higher number displays more information on the screen, it will also cause the system to load more slowly. Be sensitive to the servant's internet connection (e.g., dial-up, cable, etc.). The default is to display 5 rows of information on screen at a time. The servant can change the view count on his or her **My Profile** tab, so you should typically leave this decision up to him.

Comments Section:

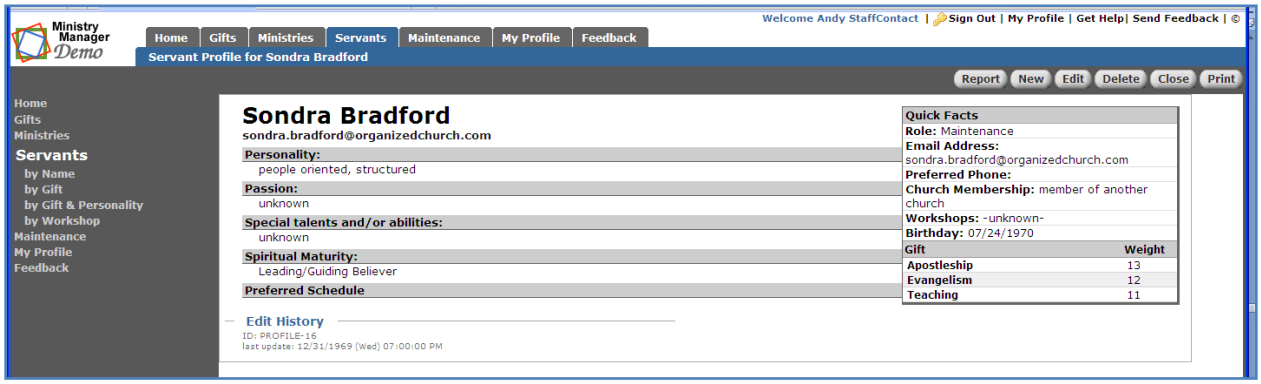


Comments: Any information not included already that might be helpful.

Once you complete the **Servant Profile**, click the **Save** button at the top right of the screen. If you need to fix something, you'll be prompted with red text, and the red "X" symbol will appear next to problem fields.

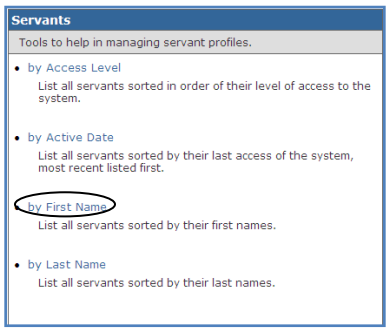
Once you successfully save the servant, the system will send an email with his username and password to his indicated email address. The system will display a confirmation on screen that the email was delivered (or not) and that the servant was registered.

EDITING OR DELETING SERVANTS



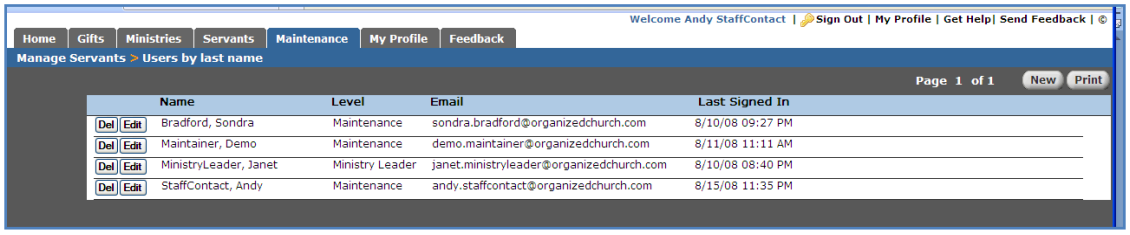
If you have permission, you can edit or delete servants either from the **Maintenance** page or from the **Servants** page.

From the **Servants** page, click on the servant you wish to change. Their Servant Profile will open. On their Servant Profile, either click the **Edit** or **Delete** button at the top right of the page. If you delete a servant, it will not ask you whether you're sure you want to proceed, so make certain you're ready to delete this person. If you edit the record, when you've made your changes click the **Save** button. If you click the **Close** button without saving, your changes will not be recorded.



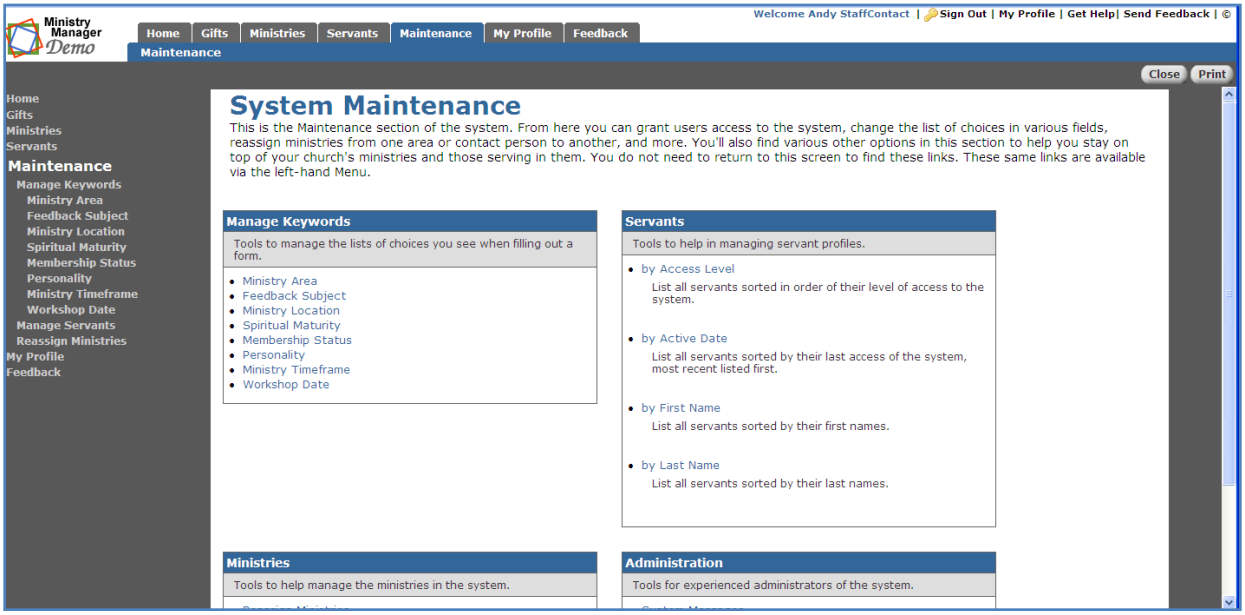
You can also go to the Maintenance page and in the **Servants** box choose a way to view servants (e.g., by Last Name, by Access Level, etc.).

The system will display a list of servants. You may then choose to delete or edit the servant(s) of your choice by clicking the **Del** or **Edit** button in the corresponding row. If you choose to delete a servant, the system will not ask whether you're sure you want to proceed, so make certain you're ready to delete this servant.



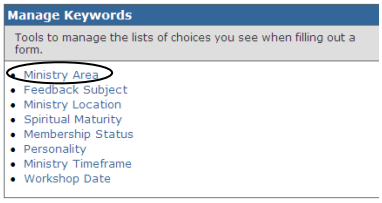
The only reason you would delete a servant is if he or she left the church, died, or entered a very definite inactive membership status. In other words, it is rare that you would ever delete a servant.

MAINTENANCE

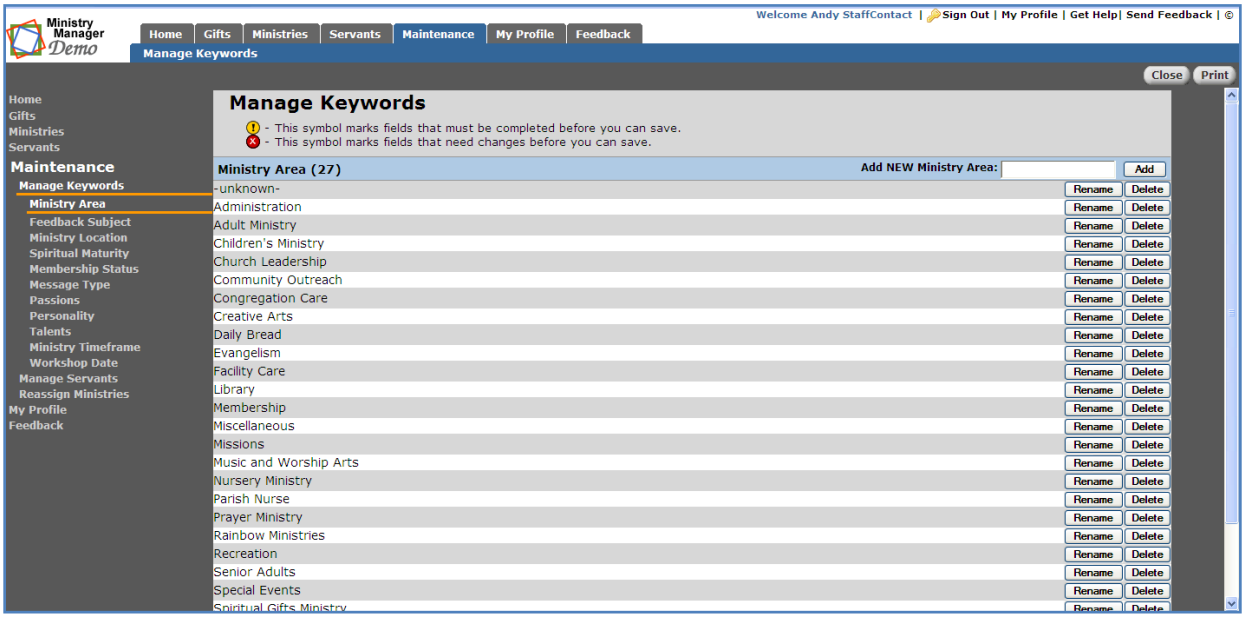


If you have been given Maintenance permission to the system, you have the authority to make certain changes such as managing keywords, adding servants, and managing ministries. You can access the Maintenance section either by clicking on the **Maintenance** tab at the top of the page or by clicking on the **Maintenance** link at the left of the page. Only those with a Maintenance role will be able to see this page.

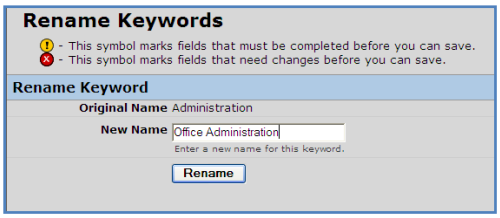
HOW TO CHANGE KEYWORDS LISTS



Keywords are the choices in lists throughout the system. You can add, delete, or rename almost any of the keywords within the system if you are a member of the Maintenance role. On the **Maintenance** page, in the **Manage Keywords** box, click on the keyword you wish to change.



A list of the current choices for this keyword will appear. You can enter a new choice by typing the choice into the **Add NEW** text box at the top right of the page and clicking on the **Add** button to save that choice. You can delete a choice by selecting the **Delete** button in the corresponding row.



You can also rename a choice by clicking the **Rename** button in the corresponding row. The **Rename Keywords** page will then allow you to enter the new choice that you wish to appear in the drop-down list. When you click the **Rename** button, the system will update all profiles that used the old name with the new name. Also, the lists in new profiles going forward will only display the new name.

Please note that if you want to make changes to the choices in the Spiritual Gifts lists, you must add, rename, or delete the actual Gifts profiles on the **Gifts** page. (See “Editing or Deleting a Gift” on page 12.)

LIST OF AVAILABLE KEYWORDS

Ministry Area: The area of the church each ministry is associated with. For example, choir and praise team ministries might fall under an area called "Music and Worship Arts" while adult Sunday morning classes might fall under an area called "Adult Ministry".

Feedback Subject: The topics a servant can choose when he submits feedback about the website.

Ministry Location: The typical location for each ministry.

Spiritual Maturity: The progression of each servant's faith walk as well as the required minimum maturity for each ministry.

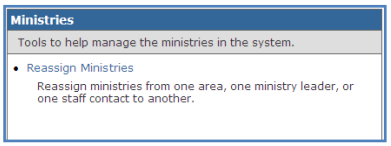
Membership Status: The servant's member status.

Personality: The personality or personal style of each servant as well as the advised personality or personal style for each ministry.

Ministry Timeframe: The typical schedule for each ministry and the typical availability for each servant.

Workshop Date: A list of spiritual gifts workshop dates (if your church offers any) for you to indicate which class a servant attended.

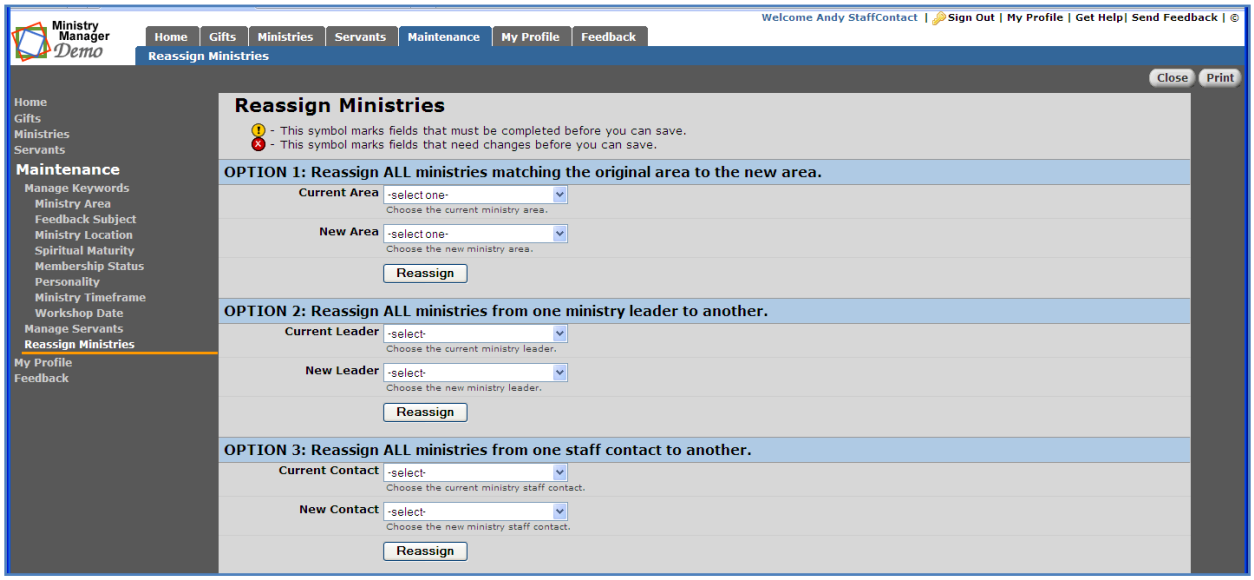
REASSIGNING MINISTRIES



If you are a member of the Maintenance role, you can reassign ministries as a batch. Go to the **Maintenance** page. Under the **Ministries** box, click the "Reassign Ministries" link.

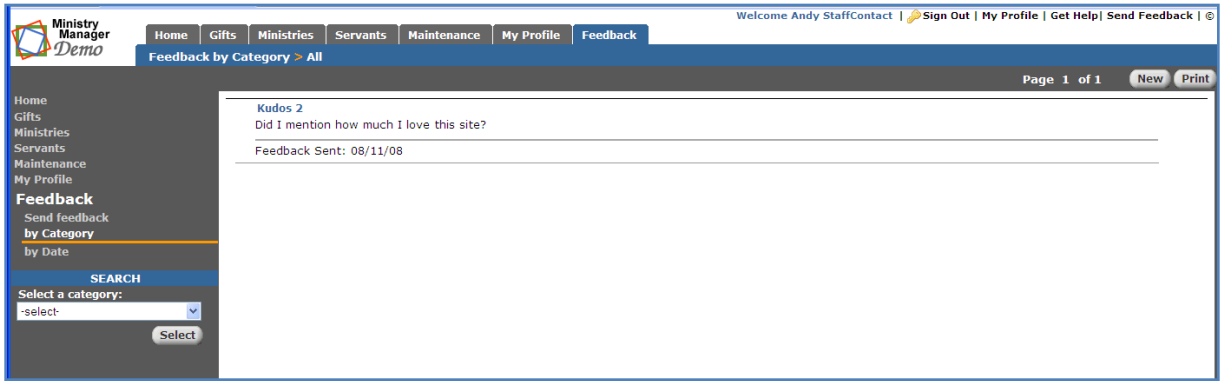
You may need to reassign a batch of ministries when a new ministry area is created and all ministries in an old area need to be moved to the new area; when you need to reassign ministry leader duties from one person to another; and when you need to reassign staff contact duties from one person to another.

First you must make sure the new area, new ministry leader, or new staff contact is already in the system. Once you create it, you can reassign the ministries to it.

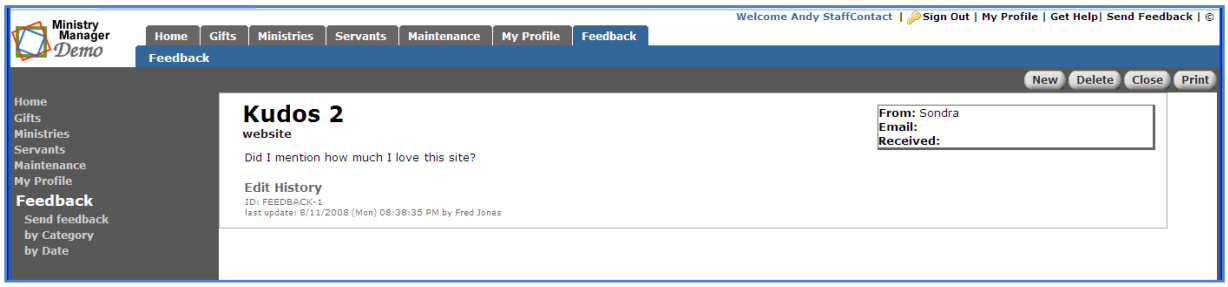


To reassign ministries from one area to another, select the **Current Area** from the list and the **New Area** from the list. Then click the **Reassign** button. In a few seconds, the system will display a confirmation that the ministries were reassigned.

VIEWING FEEDBACK



If you have permission, you can view feedback submitted through the system. Click on the **Feedback** tab at the top of the page or click on the **Feedback** link at the left of the page. A list of submitted feedback will appear so you can monitor site issues, ministry queries, etc. You can view feedback either by Category or by Date.



If you click on a Feedback form, you can view information about who sent the feedback (if provided) so you can respond to the issue as appropriate.