

How to Maintain Groups on ChurchDB

Accessing ChurchDB

- Hyperlink on top of church web site home page
- Direct address: <https://www.churchdb.com/churchdb/Login.asp?iOrgzKey=74>
- Enter User ID and Password (in 95% of cases, this is the same as you use for access to Members Portal)
- Click Login button
- For selected individuals, you may have to select Member or Staff role before proceeding. For this process, logging in as a Member suffices.

Steps to maintain a Group:

- Click on Groups on the bar on the left margin.
- Click on myGroups on the bar on the top margin.
- You will then see the Groups of which you are a Leader and of which you are a Member
- Click on the name of the Group you wish to update.
- Click Members from the sub-menu on the top margin.
- You can then change any Member status to/from Interested, Active, Inactive, Archive or Delete.
 - Whenever you change a status, click on Save.
 - If someone who has been on a Committee is no longer on that Committee, change their status to Archive (so we can retain for historical purposes).
 - If someone is shown being Interested, follow up with them to see if they have a future interest. If not, Delete.
 - Other status changes are self-explanatory.
- You can add a member from the ChurchDB database by typing in a few letters of his/her last name, then click Lookup and select the appropriate name by checking the “Check to Join” column, then click the Add Members button.
- To update other information about the Group, select Details from the sub-menu on the top margin. Here you can:
 - Update the Description, which is what a member would see if they were determining whether to check off this Group as an interest.
 - Update the Leaders, which should include the Committee Chair, Team Lead or Program Coordinator (or Co-Chairs, Co-Coordinators) plus the Program Board or Board of Trustees member who has overall responsibility for the activity (Group). Here you click the Delete button, or type in the first few letters of a new leaders last name, click the Add button then select the appropriate name under the “Check to Join” column, then click Add Leaders.
 - Note: Anyone designated as a Leader will receive an email whenever a new person’s interest is added to ChurchDB.

Steps to maintain an eGroup

- Click on Groups on the bar on the left margin.
- Click on eGroups on the bar on the top margin.
- Select the Category (see explanation below) of the eGroup that you wish to maintain. Only the eGroups corresponding to a Group that you are a Leader of will be displayed.
- Select the eGroup of interest.
- A few things to note here:
 - If you add a person to an eGroup, the system will not automatically add them to the Group, but if you add a person to a Group, the system will automatically add them to the eGroup.
 - Statuses in eGroups are different for eGroups than they are for Groups. A person that is Interested in the Group defaults to Inactive in the eGroup. For Committee and Staff categories, this makes sense, but generally speaking, if it’s a Ministry (program), Interested people in a Group should be changed from Inactive to Active in the eGroup.

- Adding a person to an eGroup from the ChurchDB database is done the same way as it is done for Groups
- With eGroups, you can add people who don't exist in the ChurchDB database by typing in their Last Name, First Name and Email in the Add Outside Members section of the view.
- There are a few other controls for eGroups. Select Details from the sub-menu on the top margin where you can specify the email behavior as shown below:

? Reply To	<input type="checkbox"/> eGroup <input checked="" type="checkbox"/> Sender
? Allow Postings By	<input checked="" type="checkbox"/> eGroup Members <input type="checkbox"/> eGroup Leaders
? Include Member Footer	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
? Include Unsubscribe Link	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

- The above are the suggested settings for these controls, except for the Reply To, explained below:
 - If the eGroup is a Committee or Staff, the Reply To usually should be set to eGroup. This enables internal communication.
 - If the eGroup is a Ministry (program), the Reply To usually should be set to Sender. This prevents email considered to be “junk” from going to everyone on the list when it's not necessary.

Categories of Groups and eGroups:

- Structure (hierarchy): ChurchDB organizes all groups according to function:
 - Ministry: These are the programs of the church, and the Ministry groups are further grouped by “area”. The “areas” defined for our church map to the Program Board positions, plus separate groupings for Neighborhood Network and Covenant Groups. As a matter of procedure, the Program Board member is included as a leader of the group.
 - Organization: These are the entities in the church that are either elected, appointed or defined by some other position. These groups are not visible to individual members for sign-up.
 - Committee: Formally defined councils, committees and task forces under the auspices of the Board of Trustees or Program Board. This does not include groups that are often referred to as “committees” (see Staff below). Committees meet, deliberate, discuss, decide and/or recommend.
 - Staff: Groups of volunteer Members and Friends who support the church's administrative, facilities, program, RE and technical functions
 - Other: These are reserved for Children & Youth Religious Education use
- **myGroups** (on top menu) lists all the groups you are assigned as leader and as member
 - You can see the **Details** of the group: Description, Leader, web site, email.
- **eGroups** (on top menu) are derived from myGroups. eGroups give you the ability (in some cases – controlled by the Group leader) to send emails to all eGroup members using a dynamic alias generated by ChurchDB.