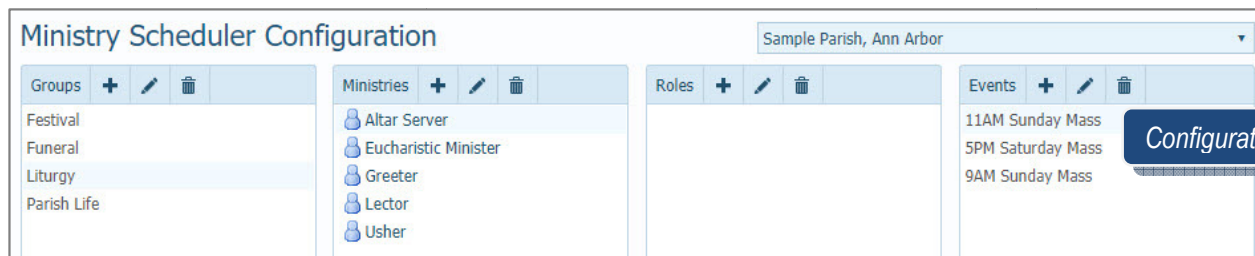


Salt Lake City Roadshow 2018

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Configuration exercise

1. Creating Ministry Groups
 - a. Click on **Configuration**
 - b. Click on the plus sign next to Groups
 - c. Enter data
 - i. Group Name: **Hospitality**
 - ii. Ministry Name: **Chairperson**
 - iii. Event Name: **9am Sunday Mass**
 - iv. Event Time: **10:00 AM**
 - d. Click **Save**
2. Creating Ministries
 - a. Click the **plus sign** next to Ministries
 - b. Type **Server**, click **Save**
 - c. Click the **plus sign** next to Ministries
 - d. Type **Cantor**, click **Save**
3. Delete Ministry
 - a. Click **Cantor**, the incorrect ministry
 - b. Click the trash can icon to delete
4. Creating Roles

- a. Select **Liturgy**
 - b. Select **Usher**
 - c. Click on the **plus sign** in the Roles column
 - d. Type **Lead**, click **Save**
5. Editing Events
- a. Select **Hospitality** in the Groups column
 - b. Select **9am Sunday Mass** in the Events column
 - c. Click the Edit icon
 - i. Sunday Obligation Mass
 - ii. Event Occurrence
 1. One-time event
 2. Recurring event
 - a. Start date
 - b. No End Date, End After _ Occurrences, or End By: mm/dd/yyyy
 - d. Click **Save**

Weekly
 Monthly

Weekly Events

Recur every week(s) on:

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Recurring weekly

Weekly
 Monthly

Monthly Events

Day of every month(s)
 The of every month(s)

Recurring monthly

Minister Directory exercise

1. Adding Ministers

- a. Click on the **Minister Directory**
- b. Click on **Add New Ministers**
- c. Enter **Smith** in the Last Name field
- d. Click **Select** next to John Smith
- e. Enter Data
 1. Ministry Group: **Hospitality**
 2. Ministry: **Chairperson**
 3. Ministry Event: **9am Sunday Mass**
 4. Trained: Check the checkbox
 5. Click **Save & Add New**
- f. Same for
 1. Anderson, Thomas (*Save & Add New*)
 2. Miller, Lisa (*Save & Add New*)
 3. Johnson, Mary (*Save and Current*)
- g. Johnson, Mary
 1. Ministry Group: **Hospitality**
 2. Ministry: **Chairperson**
 3. Ministry Event: **9am Sunday Mass**
 4. Trained: Check the checkbox
 5. Click **Save & Close**

2. Adding Ministers in Bulk

- a. Click **Batch Add New Ministers**
 1. Ministry Group: **Hospitality**
 2. Ministry: **Server**
 3. In Last Name box type Smith
 4. Select Amy, Anne, Andrew and Adam
 5. End Date: Uncheck
 6. Trained: checked
- b. Click **Save**

3. Batch Edit

- a. Click **Batch-Edit Ministers**
- b. Ministry Search
 1. Ministry Group: **Festival**
 2. Ministry: **Cotton Candy**
 3. Ministry Event: **10am-12pm**
 4. Trained: **Trained**
- c. Edit Minister's new data
 1. Ministry Group: **Festival**
 2. Ministry: **Bake Sale**

3. Ministry Event: **10AM – 12PM**
4. End Date: **Uncheck**
5. Trained: **Checked**
- d. Available/Selected Members
 1. Select Linda Christensen
 2. Select John Heinz
 3. Select Tom Loken
 4. Select Amy Mays
 5. Select Erin Minor
 6. Click **Save Ministers**
4. Bulk Change End Date
 - a. Click on **Bulk Change End Date**
 1. Ministry Group: **Parish Life**
 2. Ministry: **Volunteer**
 3. Ministry Role: **All**
 4. Ministry Event: **All**
 5. Trained/Untrained: **Both**
 6. End Date: **Uncheck End Date**
 - b. Click **Save**
5. Temporarily Inactivate Ministers
 - a. Click on the **Edit icon** next to Spencer Abler in the Minister list
 - b. Check the **Temporarily Inactivate** checkbox
 - c. Click **Save**

Preferences

1. Click **Funnel** icon
 - a. In Last name, Type Spindler
 - b. Click **Apply**
 - c. Click **Family** icon next to Ray and Kim Spindler
2. Click **Edit Family Preferences**
 - a. No Preference
 - b. Keep Apart
 - c. Prefer Together
3. Click **Member Preferences**
 - a. Ministry – choose preferred ministry and if available for special events
 - b. Schedule Exceptions – add/delete date ranges
 - c. Exceptions By Event – example: broken leg, can still sing but not be an altar server

Teams exercises

Minister Teams – use sparingly

1. **Keep Together**
 - a. Click the **plus sign icon** on the left-hand side
 - i. Team Name enter **King-Lila**
 - ii. Select **Minister Team**
 - iii. Select **Festival**
 - iv. Select **10am-12pm**
 - v. Select **Prefer Together**
 - vi. Click **Save**

2. To add ministers to your team
 - i. Click **Advanced Filter**
 - ii. For last name, enter **King**
 - iii. Click **Apply Filter**
 - iv. Check the checkbox in front of Brent King
 - v. Click the **Add Selected Ministers** button
 - vi. Click **Advanced Filter**
 - vii. For last name, delete King and enter Lila
 - viii. Click **Apply Filter**
 - ix. Check the checkbox in front of Jacob Lila
 - x. Click the **Add Selected Ministers** button
 - xi. Click **Finish** at the bottom of the screen
3. **Keep Apart**
 - a. Click the **plus sign icon** on the left-hand side
 - i. Team Name: **Adams-Abler**
 - ii. Team Type: **Minister Team**
 - iii. Ministry Group: **Liturgy**
 - iv. Ministry Event: **9am Sunday Mass**
 - v. Preference Type: **Keep Apart**
 - vi. Click **Save**
 - b. Click **Add Minister**
 - i. Mark the checkbox in front of Todd Adams
 - ii. Mark the checkbox in front of Spencer Abler
 - iii. Click the Add Selected Ministers button
 - c. Click **Finish**
4. **Prefer Together**
 - a. Click the **plus sign icon** on the left-hand side
 - i. Team Name: **Friends Forever**
 - ii. Team Type: **Minister Team**
 - iii. Ministry Group: **Liturgy**
 - iv. Ministry Event: **9am Sunday Mass**
 - v. Preference Type: **Prefer Together**
 - vi. Click **Save**
 - b. Click **Add Minister**
 - i. Click **Advanced Filter**
 - ii. Mark the checkbox in front of Bahr
 - iii. Mark the checkbox in front of Bansemer
 - iv. Click the **Add Selected Ministers** button
 - c. Click **Finish**
5. Edit Teams
 - a. Select **Friends Forever**
 - b. Click the **Edit** icon
 - c. Change Name to **Bahr-Bansemer**

Member Teams – apply to all ministry groups and ministries



1. **Prefer Together**
 - a. Click the plus sign icon on the left-hand side
 - i. Team Name: **Edwards-Baxter Member Team**
 - ii. Team Type: **Member Team**

- iii. Preference Type: **Prefer Together**
 - iv. Click **Save**
 - b. Click **Add Ministers**
 - i. Click **Advanced Filter**
 - ii. For last name, enter Edwards
 - iii. Click **Apply Filter**
 - iv. Mark the checkbox in front of Susan Edwards
 - v. Click **Advanced Filter**
 - vi. For last name, delete Edwards and enter Baxter
 - vii. Click **Apply Filter**
 - viii. Check the checkbox in front of Grace Baxter
 - ix. Click the **Add Selected Ministers** button
 - x. Click Finish at the bottom
- 2. **Keep Apart**
 - a. Click the **plus sign icon** on the left-hand side
 - i. Team Name: **Clark-Kube Keep Apart**
 - ii. Team Type: **Member Team**
 - iii. Preference Type: **Keep Apart**
 - iv. Click **Save**
 - b. Click **Add Ministers**
 - i. Click **Advanced Filter**
 - ii. For last name, enter Clark
 - iii. Click **Apply Filter**
 - iv. Check the checkbox in front of Deborah Clark
 - v. Click **Advanced Filter**
 - vi. For last name, delete Clark and enter Kube
 - vii. Click **Apply Filter**
 - viii. Check the checkbox in front of James Kube
 - ix. Click **Finish**

QUESTIONS FROM CLASS

1. If a couple has a newborn baby, one spouse may want to stay with the baby at all times. You would set their preferences as _____.
2. When scheduling, what does a yellow dot signify?
3. When creating Groups and Ministries, it is required to create Roles. True or False?
4. Can I set members to be on vacation or unavailable to serve?

TIPS & TRICKS

- Remember that Ministry Teams should be used sparingly. The more teams you create, the more scheduling exceptions may arise.
- The blue and white member icons   signify whether or not they can be seen in My Own Church by parishioners as they volunteer. If you want to schedule specific people for ministries, you will want to Generate Events first, then make any edits and use the Auto Scheduler

ANSWER KEY

1. *Keep Apart*
2. *Some ministers have been scheduled, but not all.*
3. *False*
4. *Yes. Click on Preferences, then the member icon, then Schedule Exceptions tab to set vacation dates*