

## Using Small Groups in ACCESS

**Small Groups** are groups with a hierarchical structure, i.e. they can be divided into subgroups and sub-subgroups, etc., with leaders at all levels. Small Groups can also contain group information, such as descriptions, meeting times and meeting places.

Leaders of **Small Groups** are able to maintain group information, including rosters and attendance.

All Members of **Small Groups** are able to view the rosters of their groups and to send email messages to fellow members.


### A. For Small Group Members - Viewing the Roster

1. Click on **Home** and select **My Overview** (Skip if you are at the member home page).
2. Click on **+** in **My Small Groups** to view a list of your Groups **OR** Click on **Groups** in the main menu and select **My Groups** from the dropdown list.
3. Click on the Name of a group to see a roster table of that group's members .

### B. For Small Group Members - Sending an Email to Members

1. Select the intended email recipients from the group roster by checking the box in front of their names (or in front of "Name" in the heading to check ALL).
2. Choose **Send a Message** in the **I want to...** drop down box; then click on **Go**.
3. If you prefer to send the email from your computer via an mail client like Outlook, click on **Use E-Mail Client** at top right of screen.
4. Compose your message and fill in other fields.
5. Click on **Send Message** at bottom right.


### C. For Small Group Leaders – Updating a Roster

1. To add a member, click on **Add to Roster** and enter (at least part of) the member's name. If more than one person is listed in search results, check the desired member name or names, and when all are selected, click on **Add to Roster** in the lower right.
2. To remove members from your group, check the box by their names and click on **Drop from Roster**.
3. To update a member's position, click on the pencil  in the person's row in the roster and select the new position in the drop-down box and click on "update" at far right of his/her name.

### D. For Small Group Leaders – Adding a Group Member who is not in the Database

1. If you are trying to add a member to your Small Group roster and the person is not found in the database, click on "Add them to the database" on the right side of the screen.
2. Fill in all the information that you can, at least the following:
  - a. **First & Last Name** - use all **UPPER CASE**
  - b. **Record Type** - **Other**
  - c. **Member Status** - **GROUP PARTICIPANT**
3. Click on **Submit** and then you can go back to adding the person to your roster.

### E. For Small Group Leaders – Updating Member Contact Information

1. To add contact information ( ) for a member, Click on the individual's name in the roster and then click on the pencil  in the information screen that appears.
2. **Change** or **Add** phone number, email address, and/or address and click on **Submit** when done.

(Note that this is a Change Request only. This type of change is not applied to records until it is approved.)

### F. For Small Group Leaders – Viewing Attendance

1. View the roster and click on check boxes in front of the members' names for whom you want to view attendance.
2. Choose  in the  drop down box and click on **Go**.
3. Select the **Month**, **Year**, and **Event** being viewed and click on **Go**.

### G. For Small Group Leaders – Marking Attendance

1. View the roster and click on check boxes in front of the members' names for whom you want to view attendance.
2. Choose  in the  drop down box and click on **Go**.
3. Enter the **Marking Date** and **Event** to be marked and click on **Go**.
4. Then confirm marking information and click on **Submit**.

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