

Using ACCESS Groups

I. Group Types

ACCESS contains four types of Groups:

- Activities
- Classes
- Small Groups
- Special Groups

Activities and **Classes** are those Parish groups, which may persist from one year to the next, while their memberships change over time. Most of St. Mark Ministries are ACCESS Activities. The Knights of Columbus, for example, is considered an ACCESS Activity. The Children's Ministry sessions are considered ACCESS Classes.

Small Groups are groups with a unique hierarchical structure that 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. St. Mark's Camillus Ministry, is an example of an ACCESS Small Group.

Classes have unique capabilities for transferring and promoting students from one Class to another.

All four types of groups contain rosters of their members.

Activities, Classes and **Small Groups** enable leaders to maintain their group rosters and to mark and track attendance. Members of St. Mark's Activities, Classes and Small Groups are able to view the rosters of their groups and to send messages to fellow members.

Special Groups are unique in that they are composed of people who share certain criteria. A Special Group's roster is automatically updated by the system according to predetermined selection criteria. Special Groups have several options for who can view the roster and send messages to members. For example, there is an ACCESS Special Group comprised of those people who are leaders of St. Mark Ministries.

See "Appendix A: Comparison of Some Group Features."

II. Your Groups

Members can see the list of Groups to which they belong in several ways:

1. Click on **Home** and select **My Overview** (if you are not already at the member home page).
2. Click on **View More** in **My Groups** to view a list of your Groups organized by ACCESS's four group types plus the Small Groups of which you are a leader. **OR**
3. Click on **Groups** in the main menu and select **My Groups** from the dropdown list to view the same organized list as above.

To see a roster table of your group's members with information about each member's participation:

1. Click on the name of a group.

*Note: If your group information is not correct, click on **Report a Problem** on the top right of the screen to send a message to an ACCESS Administrator describing the discrepancy.*

III. Group Rosters

This section describes rosters for Activity Groups. (Recall that St. Mark Ministries are generally Activity Groups.) The Rosters identify members, leaders, and designated assistants, called ACCESS Assistants with information described below. A member of an Activity group may appear in a roster multiple times, such as if a member holds more than 1 position in the Ministry.

A. Roster Information

Once a roster is displayed, the following information is available:

- To display the roster of past and present members, click on **Show History** in the upper right corner. Toggle the same button **Show Current** to display only current members.
- To print the roster, click on **Print**
- To create a spreadsheet of the roster, click on **Export Grid**. **Export Grid** produces a file containing the same information that is displayed on the screen and in the same sort order. It generates a CSV (comma-separated values) file that can then be saved as an Excel spreadsheet.
- To sort the roster by a particular column, click on the column name in the roster table heading (shown below). Click on the column name a second time reverses the order (ascending or descending).

<input type="checkbox"/> Name ▲	Category	Phone	Element 1	Element 2	Element 3	Element 4
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In the roster table, the column labeled **Category** identifies the group.

Activity-related information, associated with each member, appears in fields called Elements. Element columns are used as follows:

1. **Element 1** must be the same for all members of the Activity. The Category (or a similar name) is recommended.
2. **Element 2** is usually the member's position or role in the group. A Ministry chooses its own designations, such as Director, Chair, Grand Knight, etc.
3. **Element 3** is available for Ministry use
4. **Element 4** is used by ACCESS for security rights. Security designations (Leader, ACCESS Assistant, and Officer) have been established so that ACCESS will automatically assign special rights of "Lay Leader" to individuals. These designations must not be used in other Elements. This element can also be available for Ministry use.

*Note: Ministry Names, Categories, and Element lists are maintained by St. Mark's System Administrator. To request changes, please contact an Administrator by clicking on **Report a Problem** at the top right of the ACCESS screen.*

B. Filtering a Roster

To filter a roster as desired, select an item from an Element list on the **Select Filters** line in the **Search Activities** section at the top of the roster page.

C. Selecting Roster Individuals

To select roster members for an action:

1. Click on the check boxes in front of the members' names in the roster.
 - a. To check all members' boxes, click the check box in the roster heading in front of **Name**.
 - b. If you wish to exclude certain members and uncheck them, click on the checked box in front of their names.

IV. Emails

Members of ACCESS Activities, Classes, and Small Groups are able to send email messages to members of their groups:

1. After selecting intended email recipients in a group roster, choose **Send a Message** in the drop down box. Then click on **Go**.

Users then have a choice to have the email sent from the ACCESS Server, with no fee for this service, or from the user's computer via an mail client like Outlook. The following table compares these two options:

	A. ACCESS Server Option	B. Email Client Option
Email Copy	Sender should make sure he/she is included as a recipient in order to keep a copy of the email	A copy of the email is automatically placed in the sender's Sent folder
Recipient List	Recipient list is not included on the recipients' email. Sender could save a copy of the recipient list by exporting it to excel beforehand.	The email in the Sent folder contains Bcc recipients' email addresses
Attachments	Cannot be included	Can be included
Images	Cannot be included	Can be included
Undelivered emails, e.g. bad email addresses, full mail boxes	No error messages are replied to sender for undelivered emails	Error messages are replied to sender for undelivered emails
Parents of Recipient Children	ACCESS can automatically look up and include the email addresses for parents of the recipients who are children	ACCESS can automatically look up and include the email addresses for parents of the recipients who are children
Missing email addresses	ACCESS provides a list of those intended recipients without email addresses	ACCESS provides a list of those intended recipients without email addresses

A. ACCESS Server Option

Simply complete the following items, on the screen:

1. To change the **Reply to e-mail** address, click on **change**, enter a new email address, and click on **update**.
2. To add recipients to those already selected from the roster, enter email addresses each separated by a comma. You may want to add yourself, if you are not already one of the recipients.
3. Enter text for the **Subject**.
4. Type your message. Text from a document can be copied and pasted into the message. To preserve the formatting of copied text, including tables, first save source document in Rich Text Format before copying and pasting its contents. Although it might seem as though you can paste an image into the message window, images are not sent through the system. .
5. To post your email or a different message to twitter or Facebook, click on the **+**.
6. When done, select **Send a Message** in the lower right.
7. If you have selected any recipients that do not have email addresses, they will be displayed and you will be given the option to **Print (mailing) Labels** for them or to receive an email with their names and phone numbers by selecting **Email Me This Info**.

B. Email Client Option

With the Email Client option, on the **Send a Message** screen, select **Use E-Mail Client** on the upper right and make the following choices:

1. If you want to include parents of any child-recipients, check “Send e-mail to parents of any selected children”.
2. Click on **Open E-Mail Client** to open a new (blank) email message. Note that the “Bcc” field is automatically populated with recipients’ email addresses.
3. Compose your email message.
4. Insert attachments if desired.
5. Send your message.
6. If you have selected any recipients that do not have email addresses, they will be displayed and you will be given the option to **Print (mailing) Labels** for them or to receive an email with their names and phone numbers by selecting **Email Me This Info**.

V. Mailing Labels

Members of ACCESS Activities, Classes, and Small Groups are also able to send print mail labels for members of their groups:

1. After selecting intended print mail recipients in a group roster (see **Section III Group Rosters**), choose **Print Mailing Labels** in the drop down box. Then click on **Go**.
2. Select the Label Type (Individual or Family) and the Avery Label layout. Follow instructions to preview, adjust and print the labels from the Adobe pdf file that is generated.

VI. Exporting to Excel

Members of ACCESS Activities, Classes, and Small Groups are also able to export rosters for members of their groups:

1. After selecting individuals in a group roster (see **Section III Group Rosters**), choose **Export to Excel** in the drop down box. Then click on **Go**.
2. Select desired information for export from the following list.

<input type="checkbox"/> First Name	<input type="checkbox"/> Goes by Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Label Name
<input type="checkbox"/> Gender	<input type="checkbox"/> Marital Status	<input type="checkbox"/> Family Position	<input type="checkbox"/> Birthday (month and day only)
<input type="checkbox"/> Address Line 1	<input type="checkbox"/> Address Line 2	<input type="checkbox"/> City	<input type="checkbox"/> State
<input type="checkbox"/> Postal Code	<input type="checkbox"/> Geographic Zone	<input type="checkbox"/> Sub Zone	<input type="checkbox"/> Phone Number
<input type="checkbox"/> E-mail address			

3. Click on **Export**

VII. Available Ministries

ACCESS contains a listing of St. Mark’s Ministries in a section labeled “Available Activities.” [Note that Activities to which you currently belong are omitted from your display.] A complete listing of “Available Activities” as well as “Available Classes” appears on the St. Mark Church website in “Ministries and Organizations.”

To View Available Activities:

1. Click on **Home** and select **My Overview** (if you are not already at the member home page)
2. Click on **Available Activities** in the top left section, **I Want to View**. A **Sign up for an Activity** screen appears displaying Ministries in alphabetical order with a brief description and contact information.

To Inquire or Sign Up for an Activity:

1. Check one or more of the boxes in front of the Ministry and then click on **Request to Join** in the top right hand corner of the screen. A generic email message is automatically sent to the contact person for each checked Ministry with a message that the user has requested to be a member of the Ministry. The contact would then follow up with the user to understand his/her interest. **OR**
2. Click on a name in the Contact column and a blank email message will appear with the Ministry contact's email address in the "To" field. You can then compose your own email message and send it from your computer. **OR**
3. The user can phone the contact person named in the Contact column or in the Description.



*Note: Available Activities information is maintained by St. Mark's System Administrator. To request changes, please contact an Administrator by clicking on **Report a Problem** at the top right of the ACCESS screen.*

VIII. Capabilities for Lay Leaders

In addition to ACCESS's capabilities previously described for group members, additional capabilities exist for Lay Leaders (Ministry Leaders and their ACCESS Assistants). Lay Leaders are able to add their new members to the Mark Parish database, update contact information for their group members, modify their group rosters, and view and mark attendance.

Note: Most updates to ACCESS generate Change Requests, which must be processed by an ACCESS Administrator before changes can take effect. If a Leader submits pending updates that require a short turn-around, contact Cathie Welch at office-secretary@stmarkcatholicchurch.com. Cathie will try to accommodate special needs in a timely fashion.

A. Updating Rosters

1. To add a member to a roster, click on **Add to Roster** and enter (at least part of) the member's last name. If more than one person is listed in search results, check the desired member name or names, and click on **Add** 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 information for a member (e.g. Activity Elements), click on the pencil  in the person's row in the roster.
4. To add contact information (i.e. phone number, email address, or address) for a member, click on the person's name in the roster and then click on the pencil  in the profile screen that appears.
5. This brings up a **Change Request** screen, from which you can **Change** or **Add** information.
6. When you are finished entering contact information click on **Submit** or **Cancel**.

B. 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 **View Attendance** v in the **I want to... v** drop down box and click on **Go**.
3. Select the **Month, Year, and Event** being viewed and click on **Go**.

C. 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 **Mark Attendance** v in the **I want to... v** 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** or **Back**.

St. Mark parishioners,

Thank you for reading this document.

We hope you will use the capabilities described. We welcome feedback, including criticisms and suggestions for enhancement. We also offer assistance for you or your group members in setting up and using ACCESS.

Please contact me at access-project@stmarkcatholicchurch.com

On behalf of the St. Mark ACCESS Team,
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