

Arena & Group Leader Tools

Access to Members and Reports

Blenda Cox

1/23/2016

Arena & Group Leader Tools

Life Bible Study Toolbox

The Group Leader Toolbox is a website that gives leaders direct access to their group members from anywhere. With it, leaders can interact with the members of their groups. You can see member/visitor information, send group emails or notify Membership Services of the changes of personal information for your group members.



Life Bible Study Group Access

You must hold a leadership position in a Life Bible Study class. There is a Confidentiality form to be completed and a copy is kept on file. A copy of the form is attached to the handout or can be obtained from the Membership office. Once the form is received a login will be created for you. You will be able to see all classes where you hold a leadership position. If you are a Director in a Life Bible Study class you will see all classes in your Department.

Login at <https://lbs.hfbc.org>

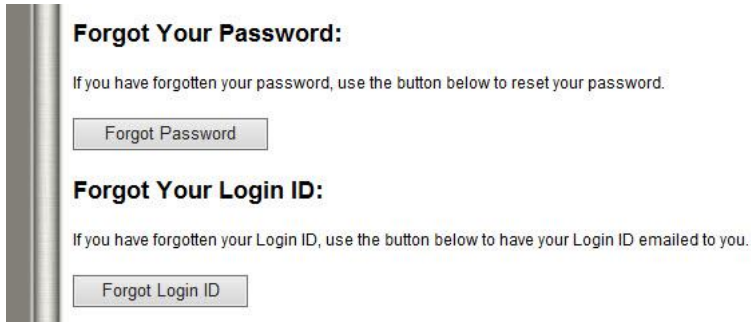
Select **Membership Login** on the left Grey navigation area. This will take you to the login page.

To Login - Enter the Login ID and Password provided to you. You will be required to setup a new password at your first login. Select the **Sign In** button to enter the Arena managed site.



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If you forget your *Login ID* or *Password* you can select to have the information sent to you by email.



Forgot Your Password:

If you have forgotten your password, use the button below to reset your password.

Forgot Password

Forgot Your Login ID:

If you have forgotten your Login ID, use the button below to have your Login ID emailed to you.

Forgot Login ID

****If we do not have a current valid email on file you will have to call into our office for assistance @ Membership Services 713-957-5878.**

Once you have successfully logged into Arena you will see the Group Leader Toolbox and a NEW feature the Attendance Search.

- **GROUP LEADER TOOLBOX** - When you have logged in you will see this option on the left of the screen. Select the link to access.



- You will be taken to the **Your Groups Page**. You will then see a list of all your available classes displayed on the right of the screen. Select the class to view using the name link.



Select Class Name to View Members									
LBS Groups	Leader E-Mail	Avg. Age	Type	Meeting Day	Marital Preference	Topic	Members	Pending Registrations	Room Number
F01 - 9:15 6TH GRADE		52	Default Type	Sunday	Any	Unknown	2	0	
MF1-college gathering		52	Default Type	Unknown	Any	Unknown	1	0	

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Attendance Search

- **ATTENDANCE SEARCH** – After log in you will see this option on the left of the screen. This a quick access to search for your class and post Attendance online. Select the link to access.



(more details in Attendance Tracking section)

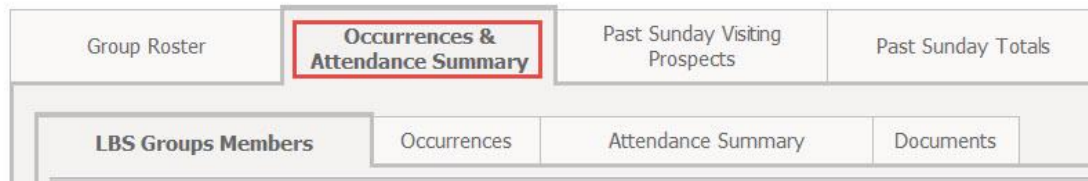
Member/Visitor Information

The LBS Group/Class page displays everyone in the group. From this page, you can email people, print a roster with contact information, view and edit group details, take and view attendance, see reports that provide analyzed information and upload documents.

- **Group Roster** - The list of Group Members will show the member's name, home phone number, date added to the group, address, E-mail address, Group Role, and Active Status. (*Active Status = Active on the class roll*)



- **Occurrences & Attendance Summary** – has multiple Tabs.
 - Occurrences - allow you to view dates of attendance for this group and post attendance.
 - Attendance - Summary tab will show a quick summary of individual attendance for this Group.
 - Documents - allows you the ability to upload documents pertinent to this group for Leader access (ex: prayer lists, handouts, etc.)



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View or Update individual information?

You can view individual & family details easily. Click on the Name of the individual to view additional information.



Name	Home Phone	Date Added	Area
BB Cox		1/16/2014	
Kelly Laughlin		1/21/2014	

Page: 1 of 1 Page Size: 600 Refresh 2.5

The Profile information will display. To provide updated basic personal information you can use the **Update** link on the top right of the screen. This will send an email to our office with the updated information for this person. This page will also give you detail information about this class member/visitor and their family.



[Member Homepage](#)
[Your Groups](#)
[User Confirmation](#)
[Guest or Member Information](#)

 Profile [Update](#)

Campus Connection
Connection: Misc. Name
Campus Name: The Loop

Personal Information
Member Status: Misc Name
Record Status: Active
Name: B (BB) K Cox

Photo
Pastoral Restrictions
Member Path
Phones
Main/Home: (713) 957-5872
Cell Phone: (281) 731-8737
Mom Cell Phone: (281) 731-8737

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Screen View of Class listing:

- Mark the Active Only check box to omit Inactive names
- Use Guest or Member Information link to add or update records

[CLICK HERE TO LOG OUT](#)

MEMBER HOME PAGE

YOUR GROUP'S USER CONFIRMATION

GUEST OR MEMBER INFORMATION

Leader

Group Name F01 - 9:15 6TH GRADE

Group URL

Type

Default Type

Unknown

Sunday

9:15 AM

Any

Any

20

Email your leaders...

Group Roster

Occurrences & Attendance Summary

Past Sunday/Visting Prospects

Past Sunday/Totals

Missing You Report - 2 Weeks

Missing You Report - 3 Weeks

Monthly Attendance Summary

Parent Info

First Name

Last Name

Apply Filter

Member Roles

☒ Male

☒ Female

☒ Unknown

☒ Active Only

☒ Member

☒ Leader

☒ Member - Visiting Class

☒ Visitor/SS

☒ 1-Director

☒ 3-Teacher

☒ Visitor/Ch

☒ Volunteer

☒ 4-Worker/Leader

☒ 5-Paid Teacher

☒ 2-Asst Director

☒ 4-Inreach Leader

☒ 4-Care Group Leader

☒ 4-Missions Leader

☒ 4-Prayer Leader

☒ 4-Womens Coordinator

☒ 4-Mens Coordinator

☒ 4-Secretary

☒ YWMA

☒ 4-Outreach Leader

Name	Home Phone	Date Added	Address	City	State	Zip	Proximity	Email	Role	Active	Date Inactive
BE Cox	(713) 957-5872	1/5/2016	10539 Badger Canyon Dr	Houston	TX	77055	16.20	blenda.cox@houstonfirst.org	2-Asst Director	<input checked="" type="checkbox"/>	
Candice Gonzales	(832) 744-7806	1/5/2016	7615 Bubbings Spring Ln	Houston	TX	77066-3003	9.55	candice.gonzales@houstonfirst.org	Visitor/SS	<input checked="" type="checkbox"/>	

Page 1 of 1

Page Size: 20

Refresh

2,185 Groups Member(s)

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How do I email my group?

Using the filters available in top of the roster section choose the Role (Teacher, Member, etc) to include in the display. These records will be the group that can be included in the email or the export file. Use the **Apply Filter** button to display the requested information.

Once you have the correct records displayed choose the mail envelope icon at the bottom right of the screen to access the email communication screen. All records visible from the selection of roles will be included in the email.



Name	Home Phone	Date Added	Area	Address	City	State	Zip	Proximity	Email	Role	Active	Date Inactive
BB Cox		1/16/2014								Director	✓	
Kelly Laughlin		1/21/2014								Visitor/SS	✓	

Page: 1 of 1 Page Size: 600 Refresh 2 Small Group Member(s)

- Use the Membership template (see below) to start the email. This will add the Church logo and the person's first name in the body of the email.
- Change the **From** and **Reply To** email accounts to your email account and then add your subject and the body of the message.

Email Communications Page:

Use this form to send an email to the individual(s) that you have selected.

NOTE: Only 2 of the 3 individual(s) you've selected have a valid email address. Those that don't have a valid address will NOT receive your communication.

To: [\(show list\)](#) [Add...](#) [Clear All](#)

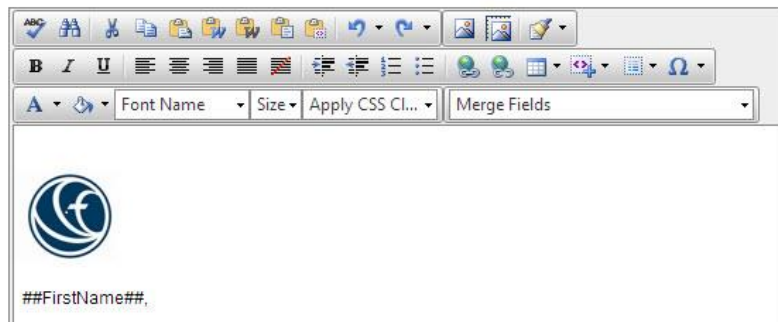
Template:

From:

From Email:

Reply To Email:

Subject:



##FirstName##

NOTE: Do not use the BULK Email field at the bottom of the Communication screen. You will not be sending bulk emails.

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Things you need to know:

Here are a few items of importance.

- You **must** have a Confidentiality form on file to get an authorized login.
- This is a live view of the class listing.
- Notify Membership when leadership changes, so we can update the login access.

Export to Excel:

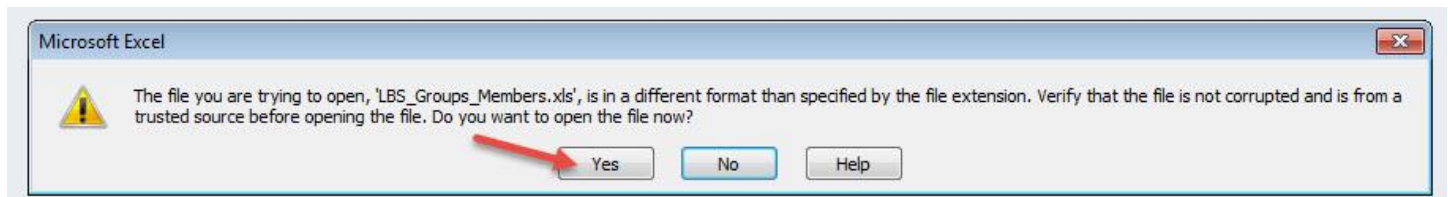
When the option for Excel is selected you will get some prompts before the file will display. Sometimes the questions may appear 'behind' the page and you will need to minimize the current screens to see the question. The first prompt will depend your security settings and the second is a function of Excel.

Here is a sample of the *first* question:

Do you want to open or save **LBS_Groups_Members.xls** from **lbs.hfbc.org**?

- This will prompt you to *OPEN* or *SAVE* this file.

Here is a sample of the *Second* question:

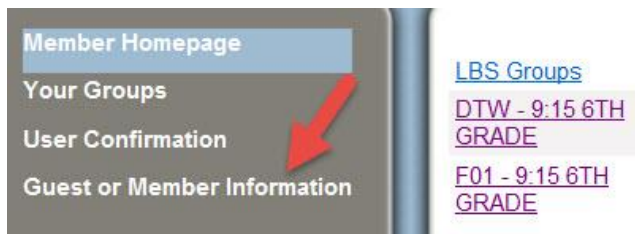


- Choose *YES* to display the file.
- Delete any columns that are not needed.
- You will need to select "Save As" and change the file type from 'Web Page' to Excel Workbooks when saving the file.

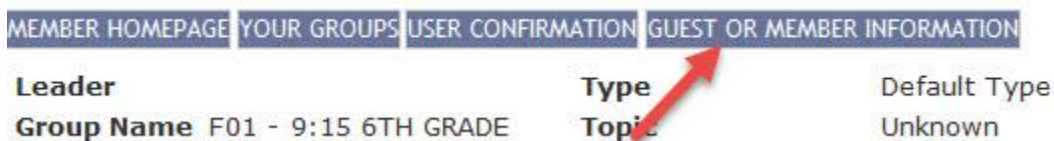
Guest or Member Information Form

Use the online form **Guest or Member Information** link to add or update detailed information. You can access this form in two ways on the Life Bible Study website:

1. Navigation listing on the left of the screen



2. Tabs from the Group Leader Toolbox screen



NOTE: It is also available on the Membership page of the Houston's First Webpage.

<http://houstonfirst.org/start-here/membership> There is a link at the bottom of the page.

This form is an online version of the White Slips that members and guests fill out in hard copy form on Sunday's. It can be used instead of the paper forms. We review these for duplicate information prior to updating the database. The form can easily be accessed with laptops or tablets from the church site without the need for a login. You can see a Sample of the form on the next page. All information that is required to be completed is marked with a RED *.

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SAMPLE:

Guest & Member Information

Current Date *

<input type="text" value="09"/>	-	<input type="text" value="05"/>	-	<input type="text" value="2014"/>	
Month		Day		Year	

Worship Hour *

 ▼

Bible Study Hour

 ▼


Department Name

Class Name

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Attendance Summary Tab

The available attendance information is for individuals that have attended the class. The screen will display basic information about the person and their attendance for the default time period. To view the Attendance Summary simply select the Tab in the Group Leader Toolbox\Groups page.

LBS Groups Members		Occurrences	Attendance Summary	Roster	Documents
<input type="checkbox"/>	<u>Name</u>	<u>Home Phone</u>	<u>Gender</u>	<u>Birth Date</u>	<u>Age</u>
<input type="checkbox"/>	 Achqill, Amy				35
<input type="checkbox"/>	Allen, Denise				43

This summary will display a default period of attendance. The tab lists the First and Last attendance as well as date detail and a % of attendance for each person. This information can be exported to Excel.

<input type="checkbox"/>	Name	Age	First Time	Last Time	Total	12/7/2014	12/14/2014	12/21/2014	12/28/2014	1/4/2015	1/11/2015	1/18/2015	
<input type="checkbox"/>	Catalo, Paula	63	12/7/2014	1/18/2015	3	✓				✓		✓	43 %
<input type="checkbox"/>	Quano, Cleocot	62	12/7/2014	1/18/2015	4	✓		✓		✓		✓	57 %

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Attendance Tracking

The Occurrence Tab is available if you wish to post attendance for classes that meet off campus or at a unique day or time. It may also make marking attendance a more efficient process than the current hard copies. An Occurrence is a record of a meeting date. To view open Occurrences, click the Occurrences tab on the Small Group page.

The screenshot shows the 'LBS Groups Members' page. The 'Occurrences' tab is highlighted with a red box and a red arrow. Below the tabs, there are input fields for 'First Name' and 'Last Name', an 'Apply Filter' button, and a 'Member Roles' section with checkboxes for Member, Leader, Member - Visiting Class, Visitor/SS, 1-Director, and 3-Teacher. A 'Display Detailed Roster' button is also present. Below this is a table with columns: Name, Home Phone, Date Added, and Area.

Name	Home Phone	Date Added	Area
Jim Cox	(281) 275-0882	5/21/2013	
Danny Uhvrek	(713) 894-1382	9/16/2014	

Each class should have a list of existing Occurrences for future dates. Locate the Occurrence for the date you wish to post (or view) attendance. The sample below shows available dates of 6/21/15 or 6/28/15. By clicking on the Name to the left of the date - you will open the screen to begin posting attendance. Once attendance posting is completed (either by Membership or electronically) the total count will then display in the 'Attendance' column on the Occurrence Tab. This will give you a quick view by week for comparison of total attendance weekly.

The screenshot shows the 'Occurrences' tab. A red callout box with the text 'Click on the Name link for the correct Attendance Date' points to the 'Name' column. A red arrow points from the 'Attendance' column to the 'Start' column.

Name	Attendance	Start
AUCN	0	6/28/2015 10:45 AM
AUCN	0	6/21/2015 10:45 AM

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Occurrence View:

The screenshot shows the 'Occurrence View' interface. At the top, there is a list of details for an occurrence, with a yellow callout '1' pointing to the 'LBS Groups' field. Below this list are two buttons: 'Edit Details' and 'Delete This Occurrence'. Underneath the buttons are input fields for 'First Name', 'Last Name', and a 'Status' dropdown menu. A yellow callout '2' points to the 'Apply Filter' button. Below the filter section is a table with columns 'Check-In', 'Check-Out', 'Attended', and 'Notes'. A yellow callout '3' points to the 'Attended' checkbox for the first row, 'Achgill, Amy'. The table lists four names: 'Achgill, Amy', 'Alaniz, Katie', 'Alaniz, Steven', and 'Allen, Denise'.

LBS Groups	MF1 - A CROSS GENERATION
Attendance Type	AUCN A Cross Generation
Name	AUCN
Location	Loop
Area	
Start Time	1/18/2015 10:45 AM
End Time	1/18/2015 12:00 PM
Check-In Location	
Check-In Start Time	
Check-In End Time	
Membership Required for Check-In	No
Occurrence Closed	No
Head Count	0

[Edit Details](#) [Delete This Occurrence](#)

First Name

Last Name

Status

[Apply Filter](#)

	Check-In	Check-Out	Attended	Notes
Achgill, Amy	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Alaniz, Katie	<input type="checkbox"/>		<input type="checkbox"/>	
Alaniz, Steven	<input type="checkbox"/>		<input type="checkbox"/>	
Allen, Denise	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

1. Verify Name of Class and date to post/view attendance.

2. Select **Apply Filter** to display member/visitor names

3. Scroll the list & use the mouse to click on the box to the right of each person in attendance to mark them present. The screen will Auto-Save after each click.

Or

Use the Name filter to search for names and click box to mark attendance.

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Things to know about Attendance slips:

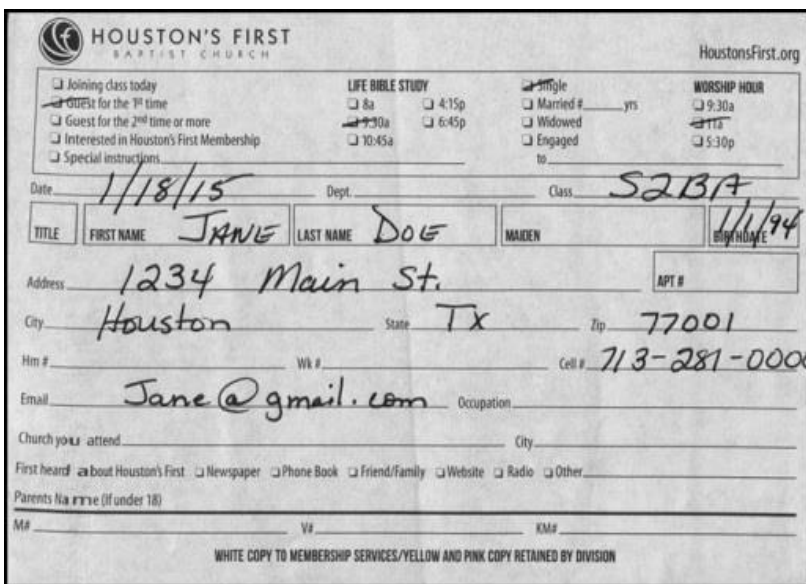
- Records **MUST** have at least one form of contact information to be entered into Arena
- Phone Number is needed for Check-In.
- Children **MUST** have at least one Parent Name to be entered into Arena
- Children are not added to adult rosters
- Records are not updated from Notes made on weekly attendance sheets

White Slip (3 part**)

Fill out this form with **date** and **department**
Also add as much individual information as possible for:

- First Time Guests
- Returning Guest or Members until they appear on your class roster
- Adding new Member to your roster.
- Any special situation.

**The White form goes to Membership, the Yellow and the Pink forms are for department/class use.



HOUSTON'S FIRST BAPTIST CHURCH
HoustonFirst.org

☐ Joining class today
☒ Guest for the 1st time
☐ Guest for the 2nd time or more
☐ Interested in Houston's First Membership
☐ Special instructions

LIFE BIBLE STUDY
☐ 8a
☐ 4:15p
☐ 9:30a
☐ 6:45p
☐ 10:45a

Single
☐ Married # yrs
☐ Widowed
☐ Engaged to

WORSHIP HOUR
☐ 9:30a
☒ 11a
☐ 5:30p

Date: 1/18/15 Dept. Class: S2BA

TITLE FIRST NAME JANE LAST NAME DOE MAIDEN BIRTHDATE 1/1/94

Address: 1234 Main St. APT #

City: Houston State: TX Zip: 77001

Hm # Wk # Cell # 713-281-0000

Email: Jane@gmail.com Occupation

Church you attend City

First heard about Houston's First ☐ Newspaper ☐ Phone Book ☐ Friend/Family ☐ Website ☐ Radio ☐ Other

Parents Name (if under 18)

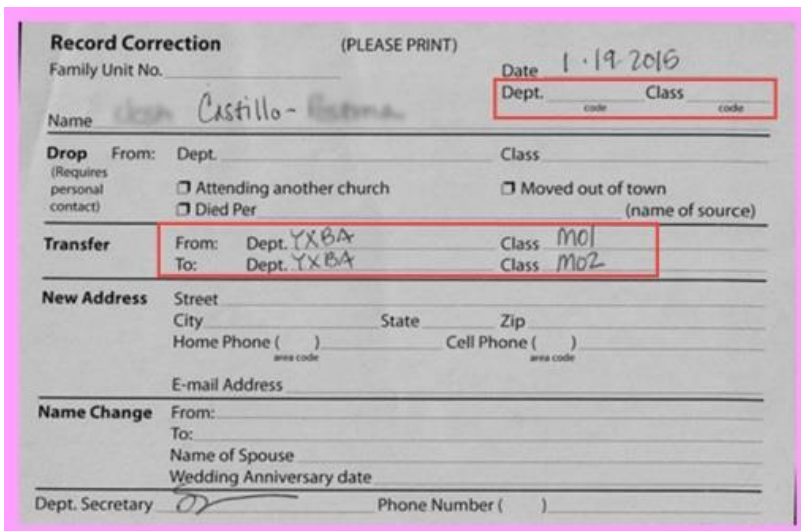
MA# VA# KM#

WHITE COPY TO MEMBERSHIP SERVICES/YELLOW AND PINK COPY RETAINED BY DIVISION

Pink Slip

Fill out this form with **date** and **department**, then as needed for changes to roster or individual information.

- Drop from Roster
- Transfer to another class
- Change Address
- Change Name



Record Correction (PLEASE PRINT)

Family Unit No. Date: 1-19-2016

Name: Juan Castillo-Rodriguez

Dept. Class

Drop From: Dept. Class

(Requires personal contact)
☐ Attending another church
☐ Moved out of town (name of source)
☐ Died Per

Transfer From: Dept. YXBA Class MO1

To: Dept. YXBA Class MO2

New Address Street City State Zip

Home Phone () Cell Phone ()

E-mail Address

Name Change From: To: Name of Spouse Wedding Anniversary date

Dept. Secretary Phone Number ()



Use of Confidential Information by Volunteers of Houston's First Baptist Church

Houston's First Baptist Church understands that the issue of identity theft is a real problem and causes immeasurable harm to those affected. We also know that identity thieves are becoming more resourceful and constantly targeting new sources of personal information to use in their crimes. Houston's First Baptist Church makes every effort to protect the private information of our members and guests. As a part of that effort, all volunteers must sign the statement below prior to receiving access in any form to personal information contained in the HFBC database.

I, _____, as a volunteer leader of Houston's First Baptist Church, hereby agree to maintain the confidentiality of all personal information of any type entrusted to me. This personal information includes but is not limited to names, birthdates, addresses, phone numbers and email addresses.

Knowing that such personal information has been entrusted to the Church in good faith, I agree to use the data only for outreach to class members and visitors, and understand that any other use of the information is strictly prohibited.

Volunteer Printed Name

Volunteer Signature

Date Signed

Volunteer Email address

