MIDNIGHT MADNESS 2016

Arena & Group Leader Tools

Access to Members and Reports

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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.
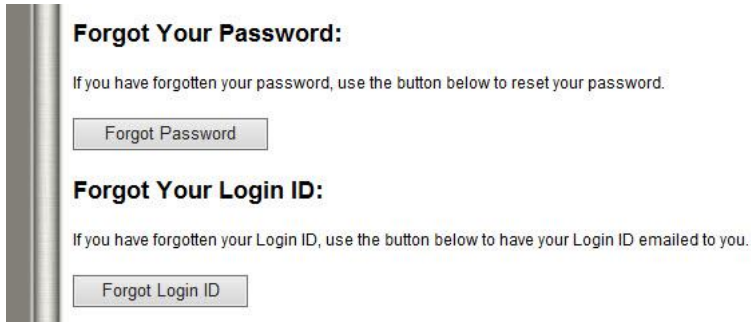
Login at **https://lbs.hfbc.org**

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.

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.

Home
NextGen
Group Leader Toolbox
Attendance Search

- o 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.

Member Homepage
Your Groups
User Confirmation
Guest or Member Information

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	

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.)
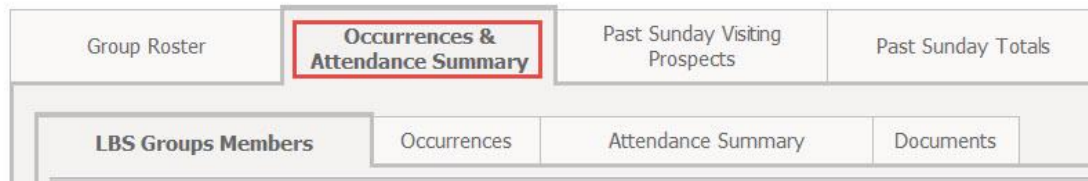
View or Update individual information?

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

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.

Screen View of Class listing:

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

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.

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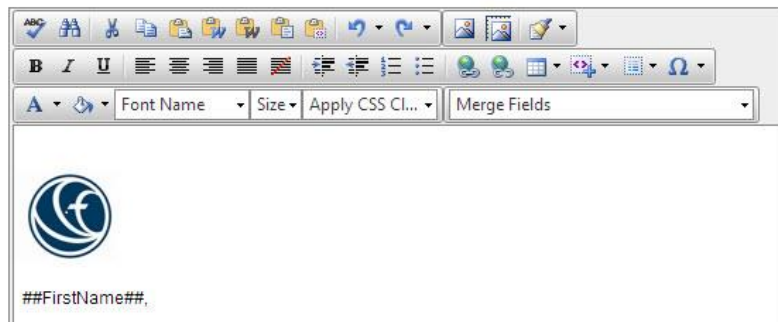
NOTE: Do not use the BULK Email field at the bottom of the Communication screen. You will <u>not</u> be sending bulk emails.

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.
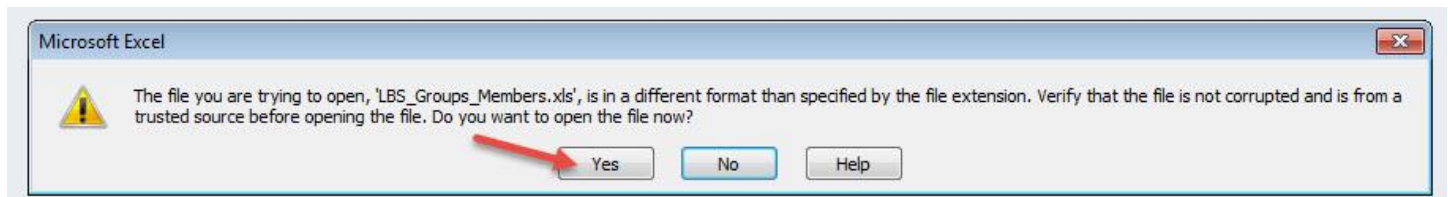
Export to Excel:

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:

Microsoft Excel

The file you are trying to open, 'LBS_Groups_Members.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

[Yes]   [No]   [Help]

- 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.
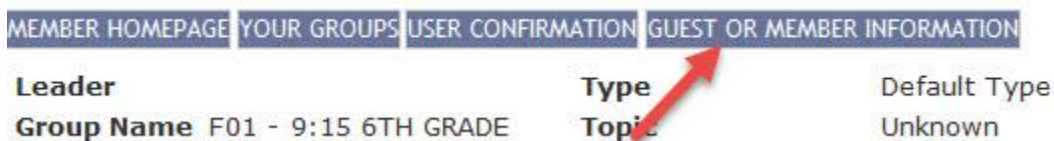
Guest or Member Information Form

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
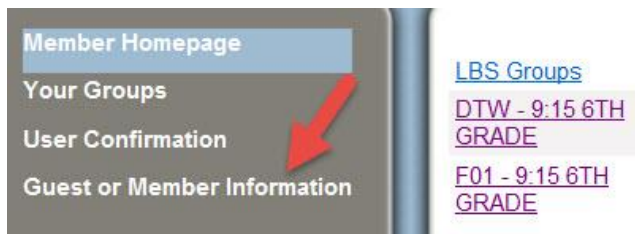
2. Tabs from the Group Leader Toolbox screen

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

SAMPLE:

Guest & Member Information

Current Date *	09	05	2014
	Month	Day	Year

Worship Hour *	11a
Bible Study Hour	6:45p
Department Name	
Class Name	

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.

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.

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.

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.

Arena & Group Leader Tools

Occurrence View:

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.
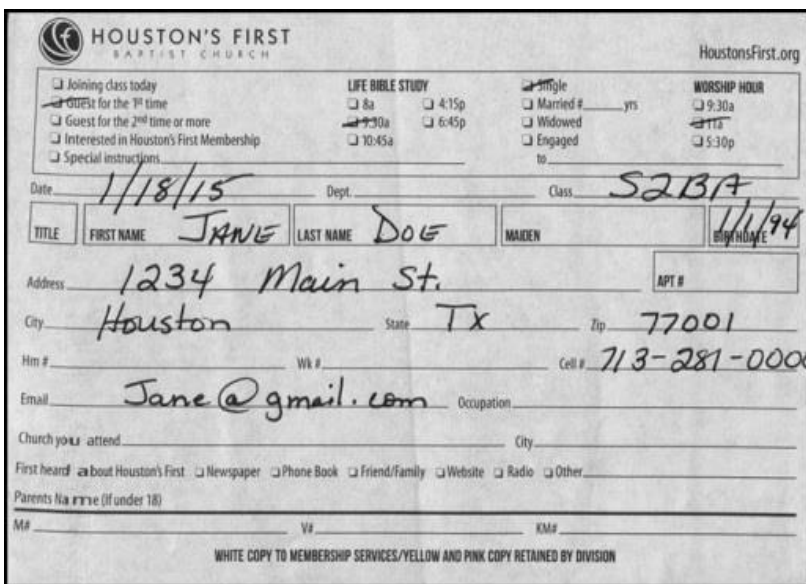
Things to know about Attendance slips:

➢ 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 <u>not</u> 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.

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

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