Oklahoma Conference
Brick River Church Dashboard

User Guide

Updated: 8 August 2018

TABLE OF CONTENTS

BRICK RIVER
CHURCH DASHBOARD INTRODUCTION

The Brick River church dashboard is a web-based feature that allows local churches to update the information for their church both in the conference database and on our conference website.

In addition, the dashboard gives churches the opportunity to add their leaders directly into the conference database, allowing the conference and district offices the ability to communicate directly with the leaders of the church.

It is our expectation that every local church will use the dashboard so that the conference and district offices can have access to the most up-to-date information regarding your church's leaders.

The pages that follow take you through a step-by-step process on how to use the church dashboard. If there are questions regarding the church dashboard that are not answered in this document, please contact your district administrator.

LOGGING IN TO THE
BRICK RIVER CHURCH DASHBOARD

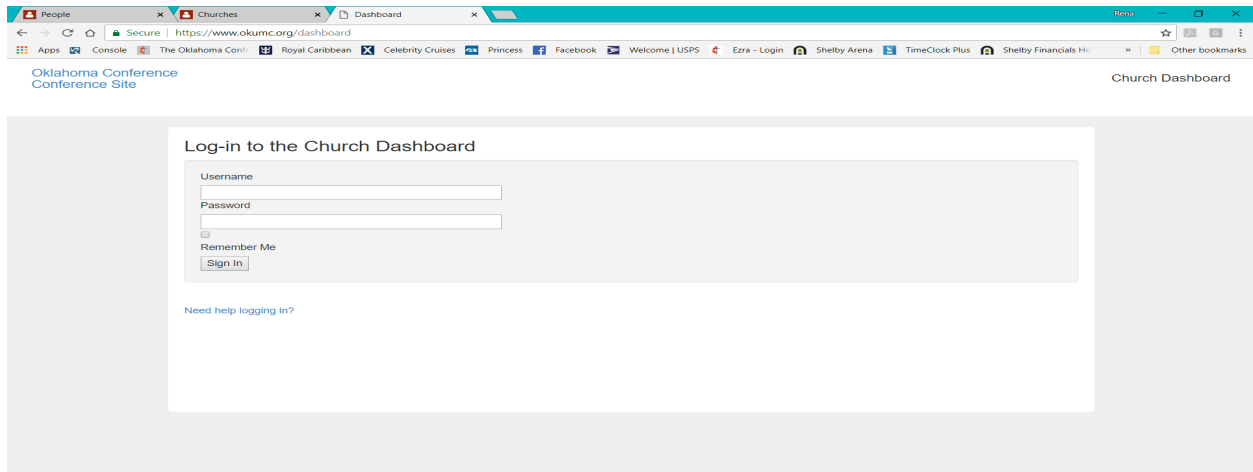There are two ways to access the login screen for the Brick River church dashboard.

Option 1
Visit www.okumc.org and click on "Brick River Dashboard Login" on the left-hand side of the screen.
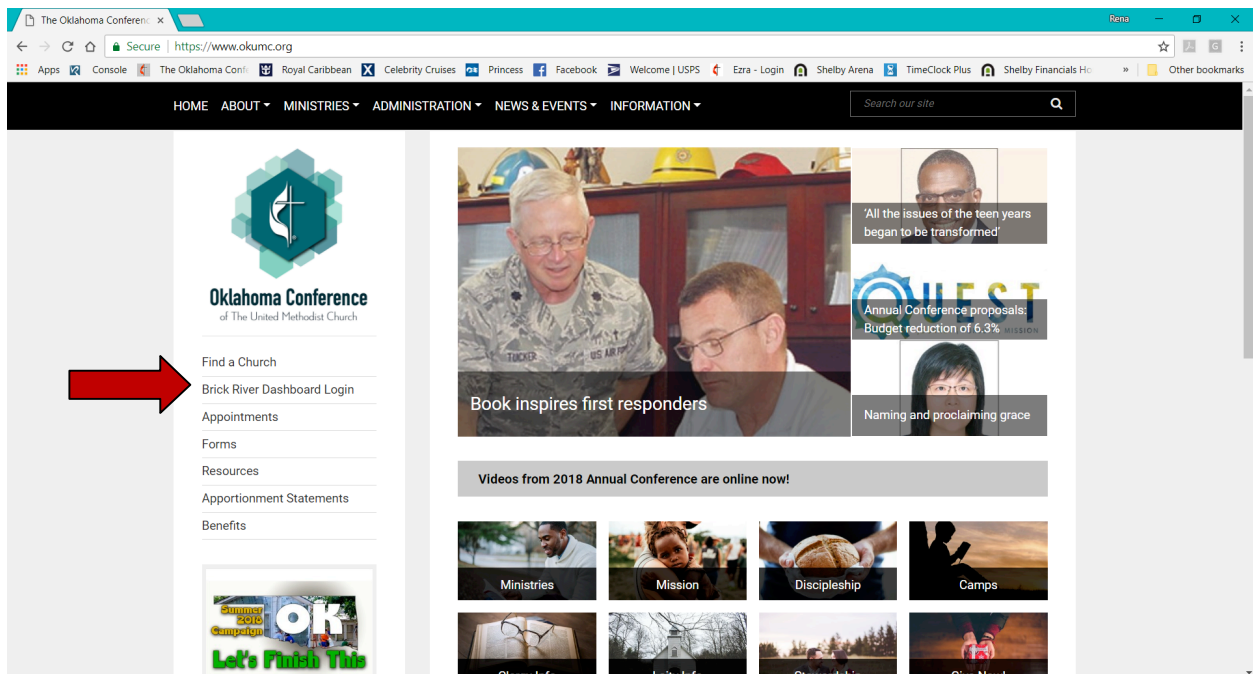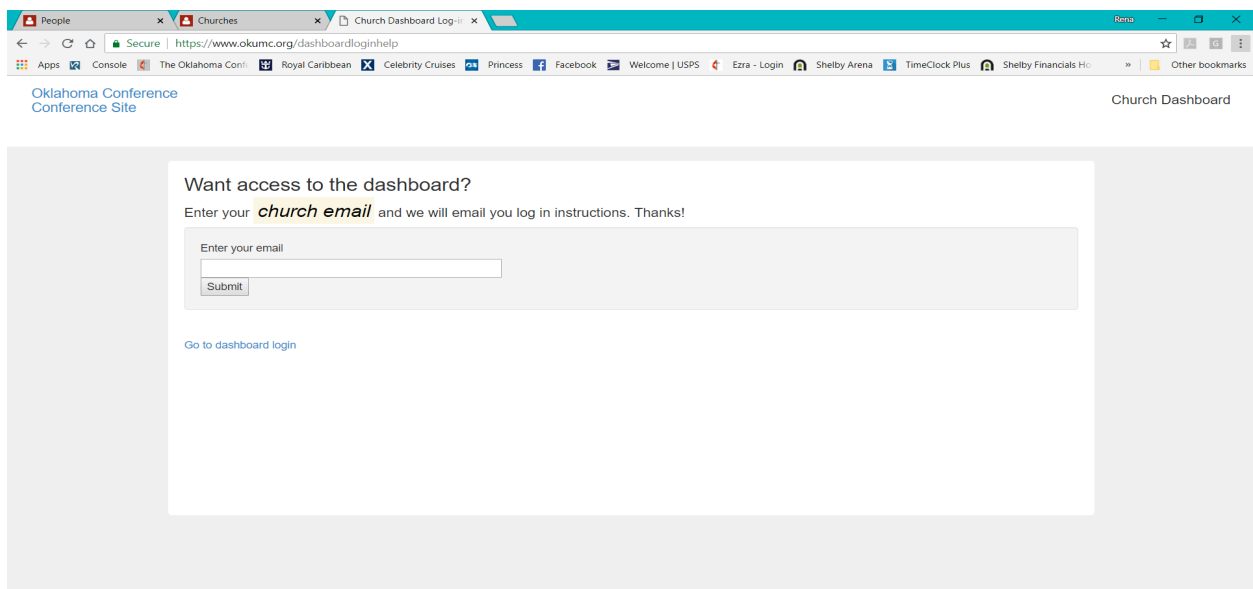

Option 2
Type http://www.okumc.org/dashboard into the address bar of your web browser and go directly to the following screen.

Log in using the username and password for your church. If you cannot remember your login information, please click on the "Need help logging in?" link and you will be presented with the following screen:


Enter your **church's** e-mail address and click "Submit". The church email that you use here **must match** the email address that is listed in our database for your church.
You will see the following screen.
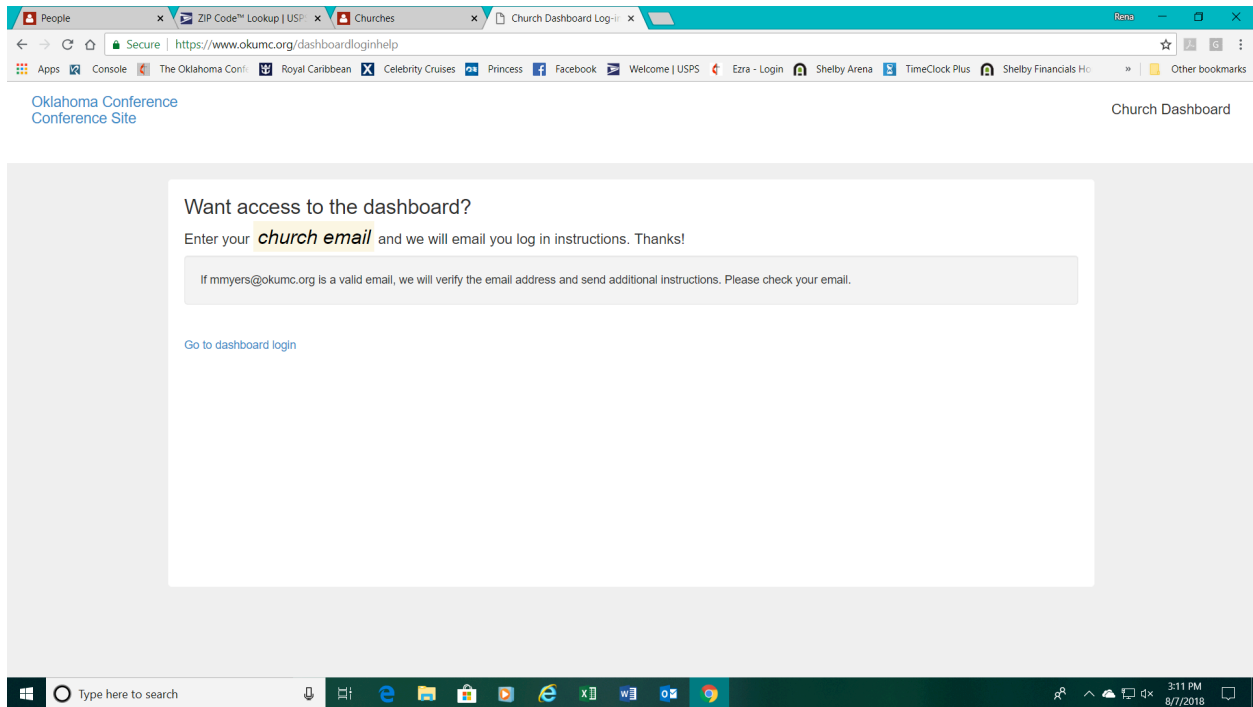
If the email address you entered is the correct email address listed for your church, you will receive an email with a link to change your password.

Click on the link and you will be prompted to enter your new password and then to confirm it. Your username will be in bold letters. In the example below, the username is "test".
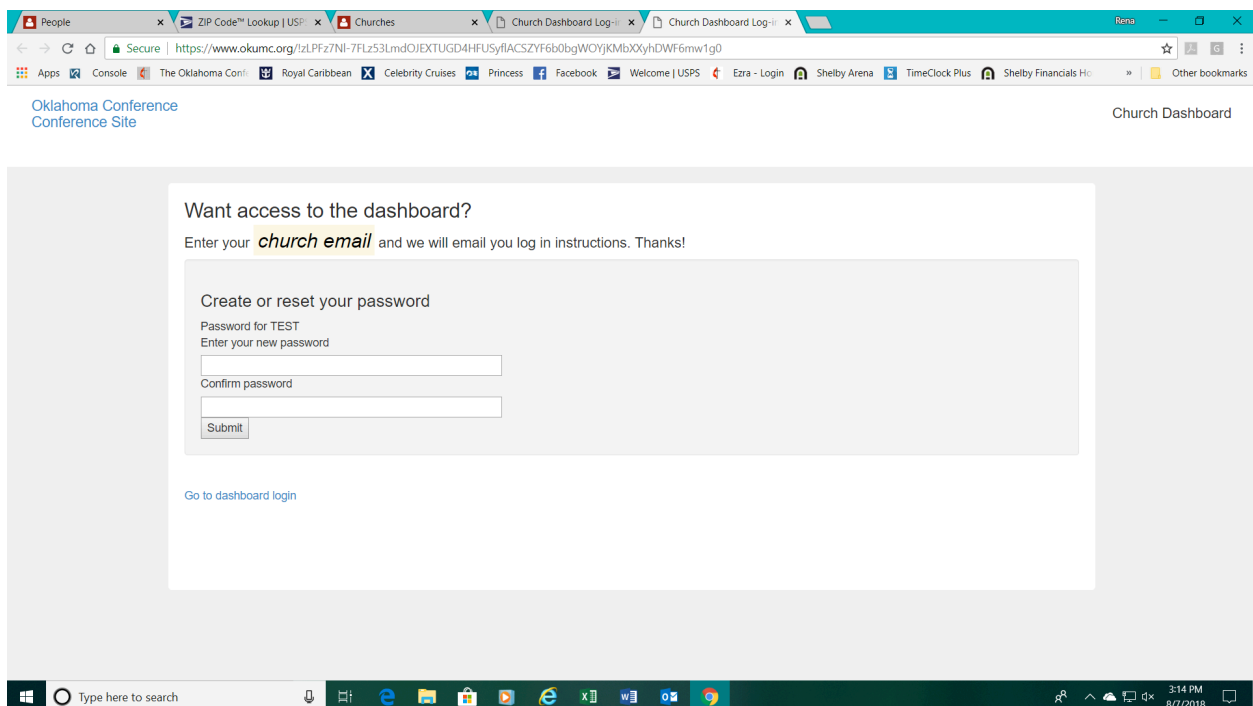
Once the password is accepted, you will need to go back to the login screen and enter the new information. Click the Sign In button.

Once you have logged in, you will be presented with the home page of the church dashboard:
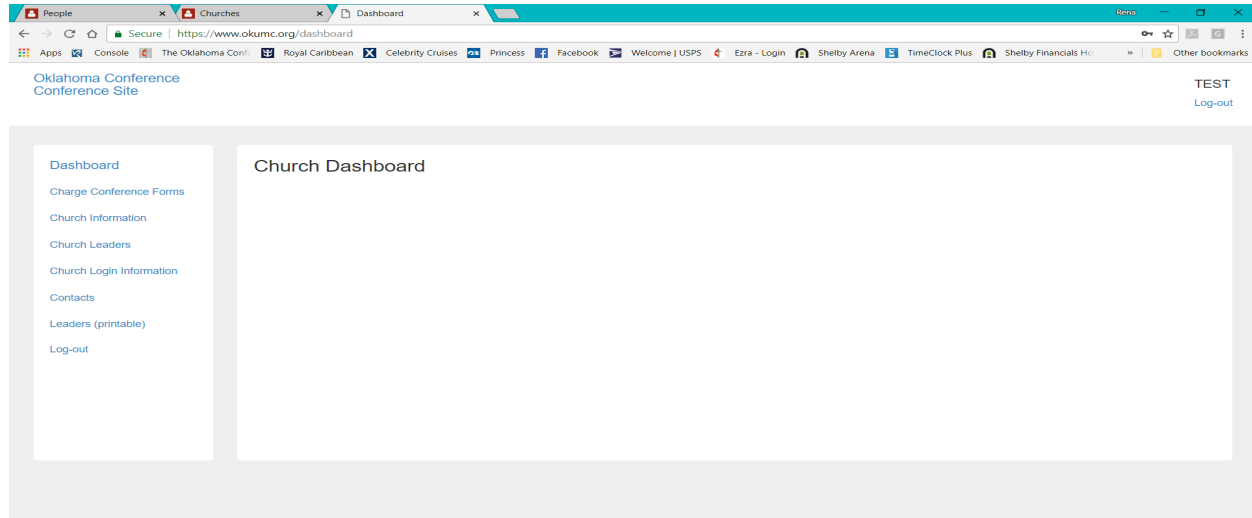
BRICK RIVER 'CHURCH DASHBOARD' HOME PAGE

The church dashboard home page has links that will take you to each section of the dashboard. This manual will cover each of the sections. The sections are as follows:

Charge Conference Forms
Church Information
Church Leaders
Church Login Information
Contacts
Leaders (printable)
Log Out - *Clicking on the Log Out link will log you out of the system and return you to the Church Dashboard Login screen.*

CHARGE CONFERENCE FORMS

The charge conference links will take you directly into the FormVite area for your church.

CHURCH INFORMATION

This area allows you to update the information for your church. Click on the "Church Information" link and the following screen will display with the information we currently have

in the database for your church.
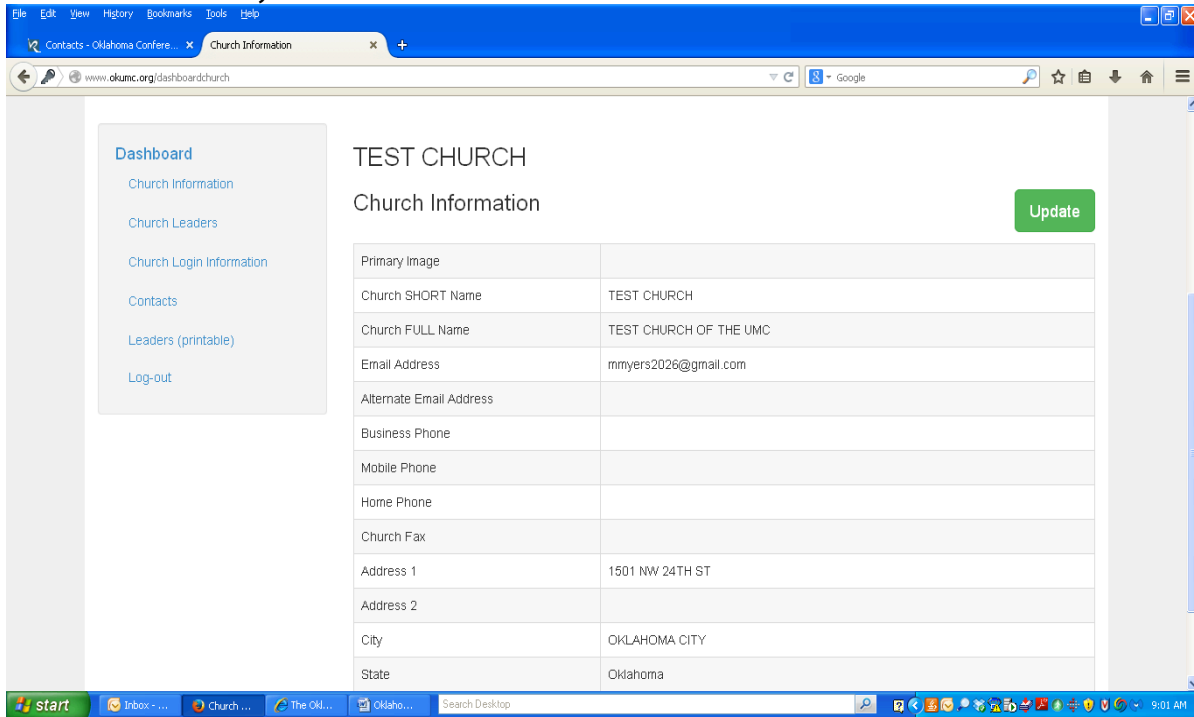
Click on the green "Update" button to make changes in any of the displayed fields. (See screen below).
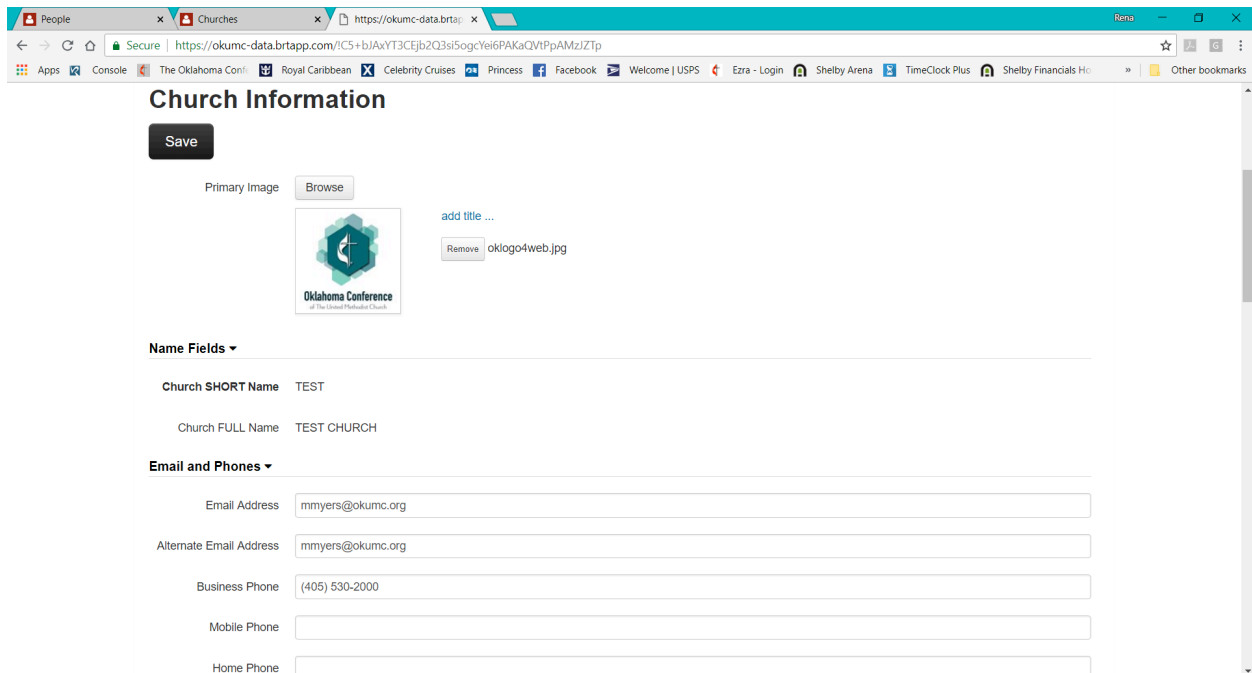
To upload a Primary Image (current picture of your church), click on the "Browse" button and navigate to the picture located on your computer. Click on the file name to highlight it and then click "open". This will upload your picture to the website.

When making changes to the contact information for your church, entries must be made using CAPITAL LETTERS and no punctuation. (The only exception is the email address.) Phone numbers should be entered in the following format (xxx) xxx-xxxx. It is very important that you **do not** put words in the phone number field such as "call first". Do not enter words in the phone number field even if you are indicating an extension. Just enter the phone number without the extension.

Please note: When entering the addresses for your church, be sure to put the PHYSICAL address for your church in the appropriate fields. This enables the website to show a map to your church.

When you have finished updating the information for your church, click on "SAVE". The following screen will display. Click "Return to Church Info".
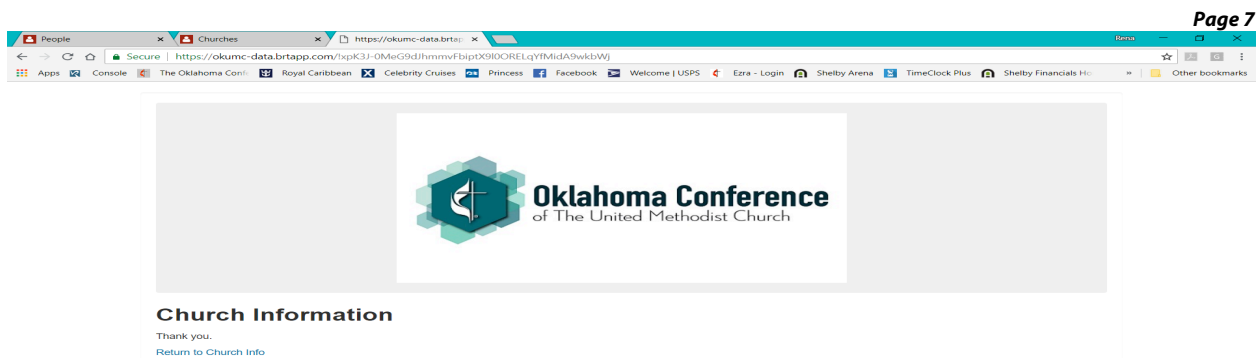
CHURCH LEADERS

This area allows you to input your local church leaders into the conference database so that the conference and district offices can contact your leaders with important information about their ministry. The dashboard will also allow churches to print lists and download contact information for their leaders.

Click on "Church Leaders" and the following page will display:
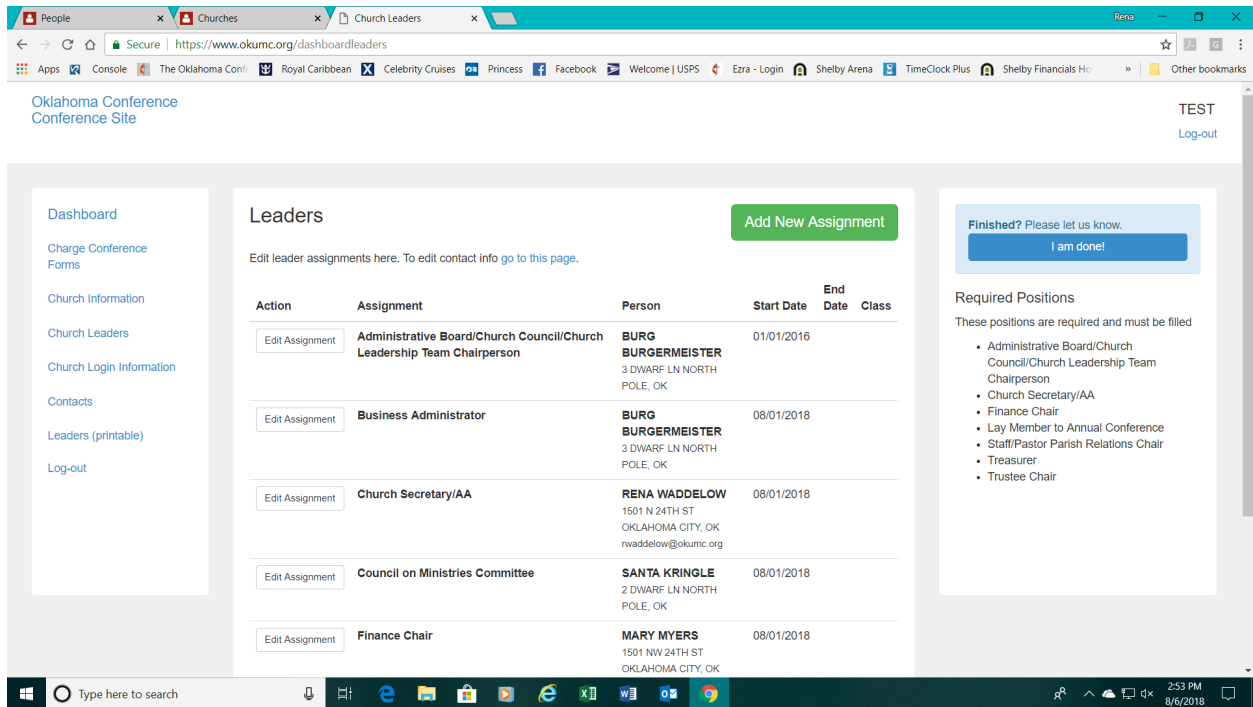
In this area, you can enter/edit all of your church's leadership assignments.

To edit an assignment for an existing leader, click on "Edit" and the following screen will come up.
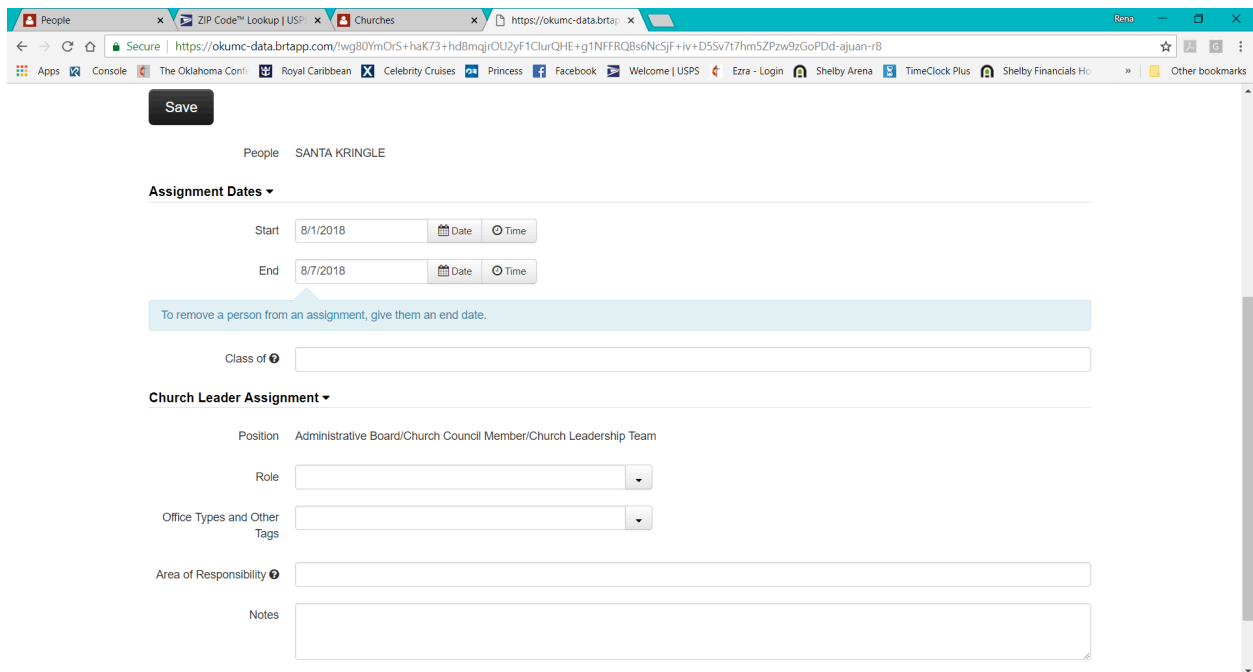
Whether the person has been re-elected to the same position or not, all you need to change on this

screen is the end date. If you leave it at 12/31/2018, as the example above shows, the assignment will automatically expire and you will no longer see it after 12/31/2018. If you change it to 12/31/2019, this person's record will reflect the assignment until that date.   If the person has been elected to a different leadership assignment, put an end date on this record and hit "Save".
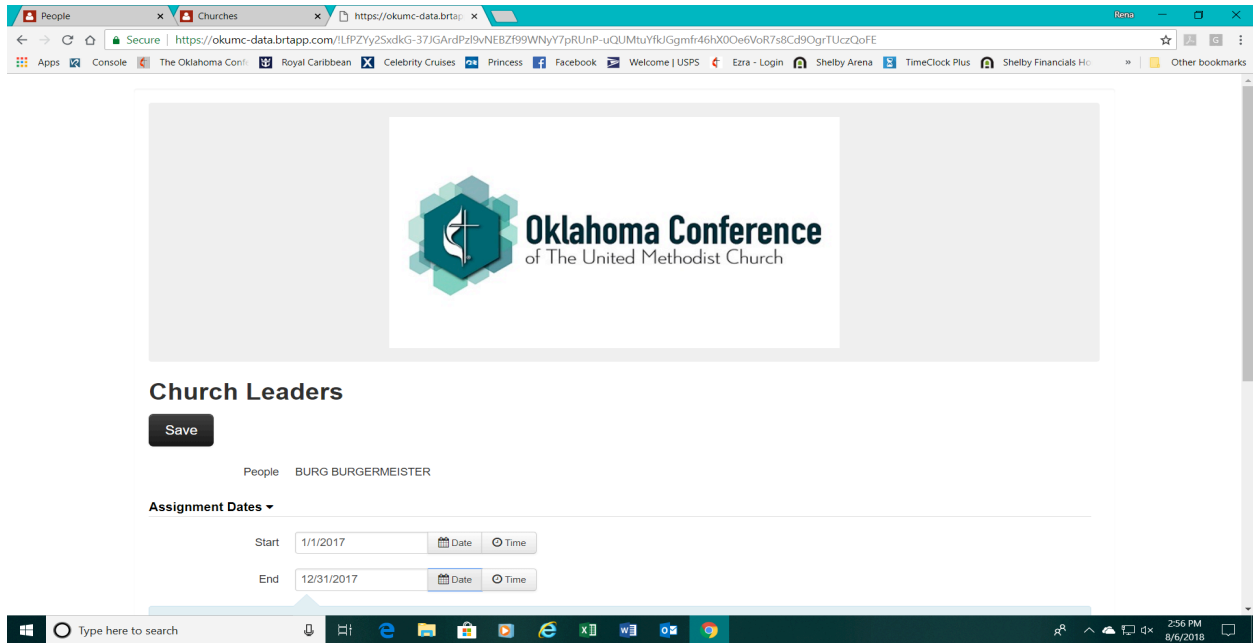
After you click on "Save", the following screen will display. Click on "Return to Church Leaders".
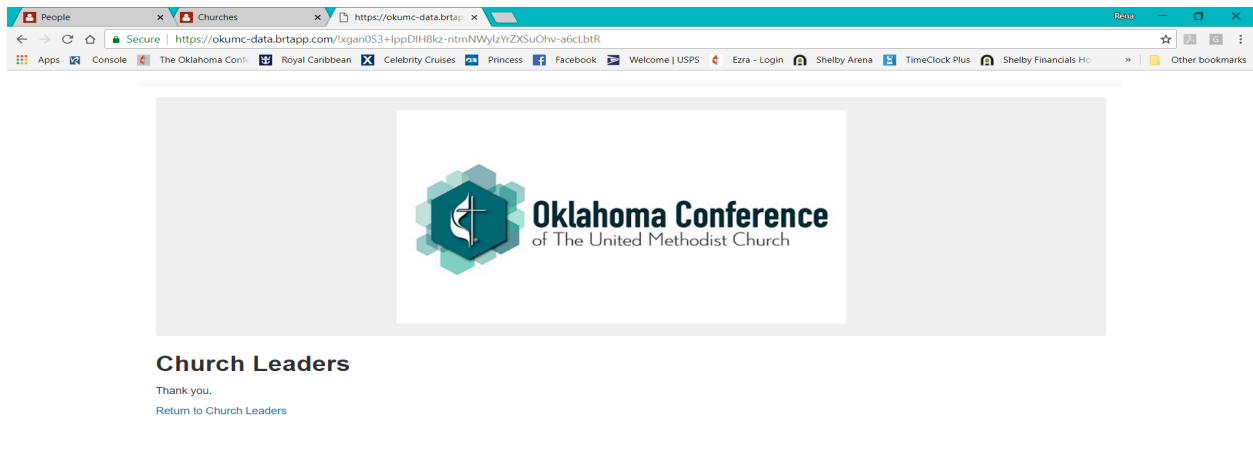
If an *existing* leader is elected to a *new* assignment position, click on "Add new assignment".

The following screen will appear:

Choose PICK THE POSITION and begin typing the assignment name. If you are not sure of the name, use the down arrow next to Select Position and scroll down through the positions.   After you choose the position, the following screen will appear:
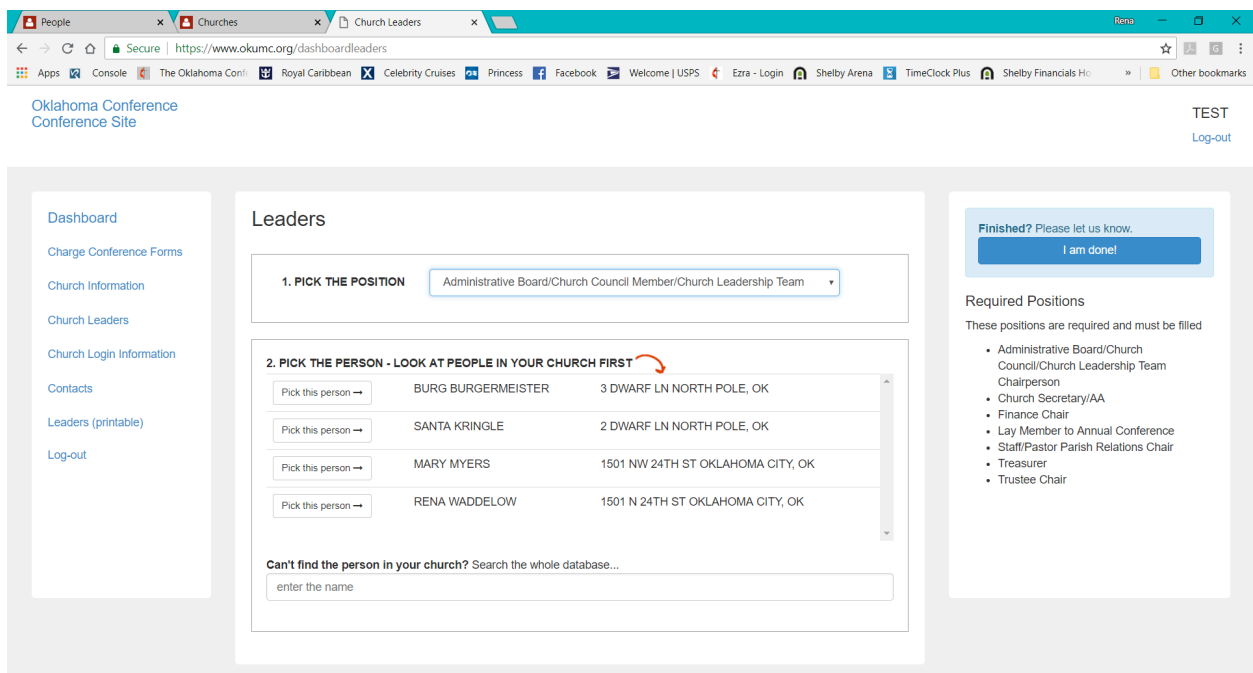
If the person is listed, pick the person. Choose the start and end date of the assignment. Click "Save". If the person is not listed, choose "Can't find the person in your church? Search the whole database.

You can put it the first and last name of the person, or just the last name and it will pull a list of those people. Pick the correct person.

Hit Save. The following screen will display:
Click on "Return to Church Leaders".

If the person that has been elected to fill a leadership assignment is not listed, click on "Add New Assignment".   Follow the steps above. If the person is not listed and the search on the database does not find them, click on the "Still not able to find the person?"
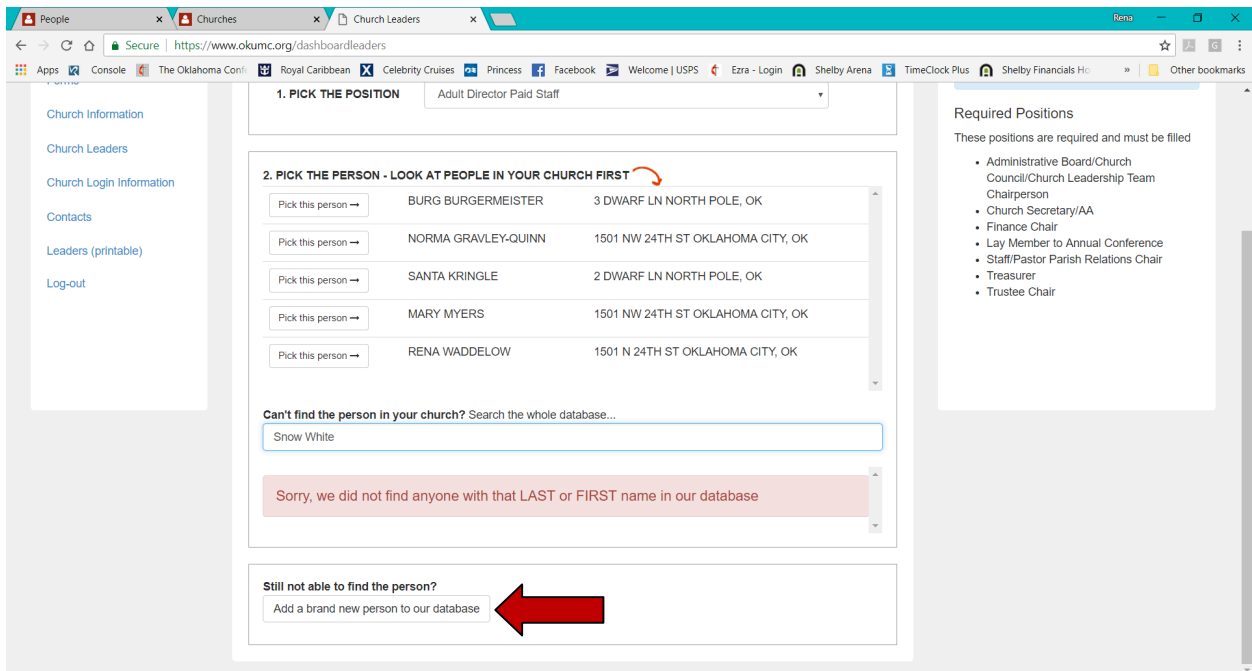
Click on "Add a brand new person".

Fill in the information (REMEMBER NAMES AND ADDRESSES SHOULD BE IN ALL CAPS).

When you have finished, click on Add new contact and create assignment. Note that the position is on the record. Hit save.

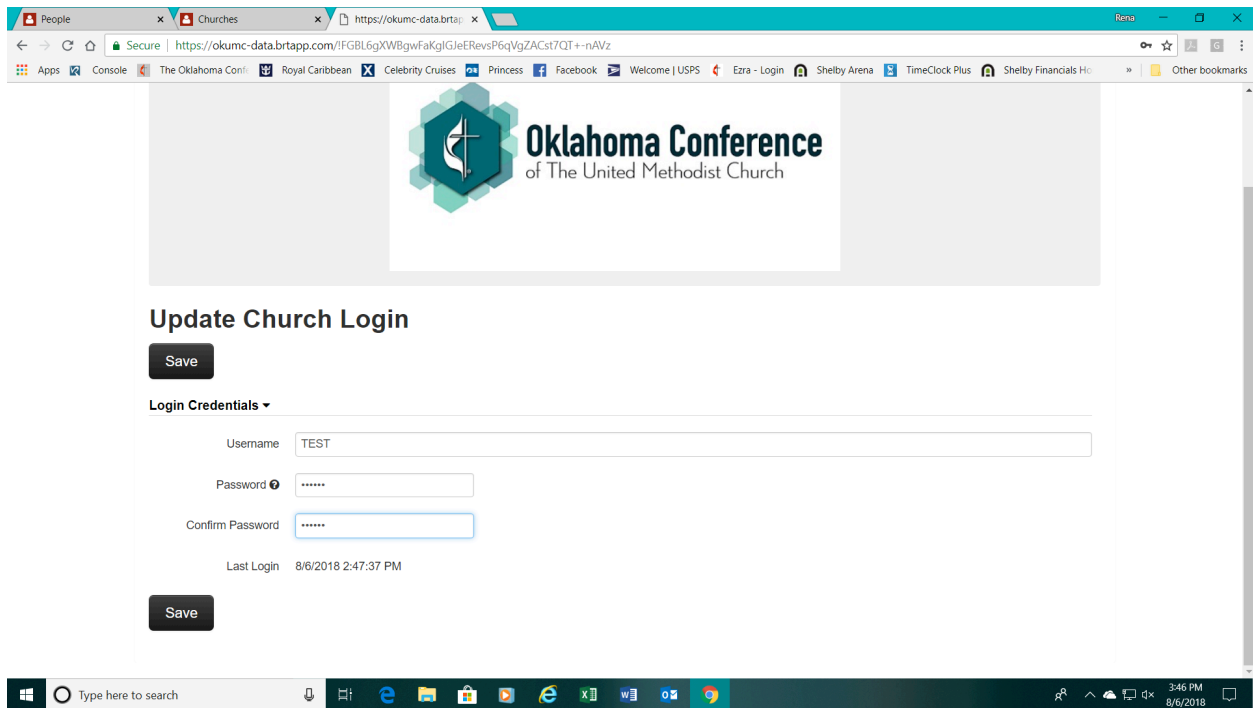After you click "Save", the following screen will appear. Click "Return to Church Leaders".
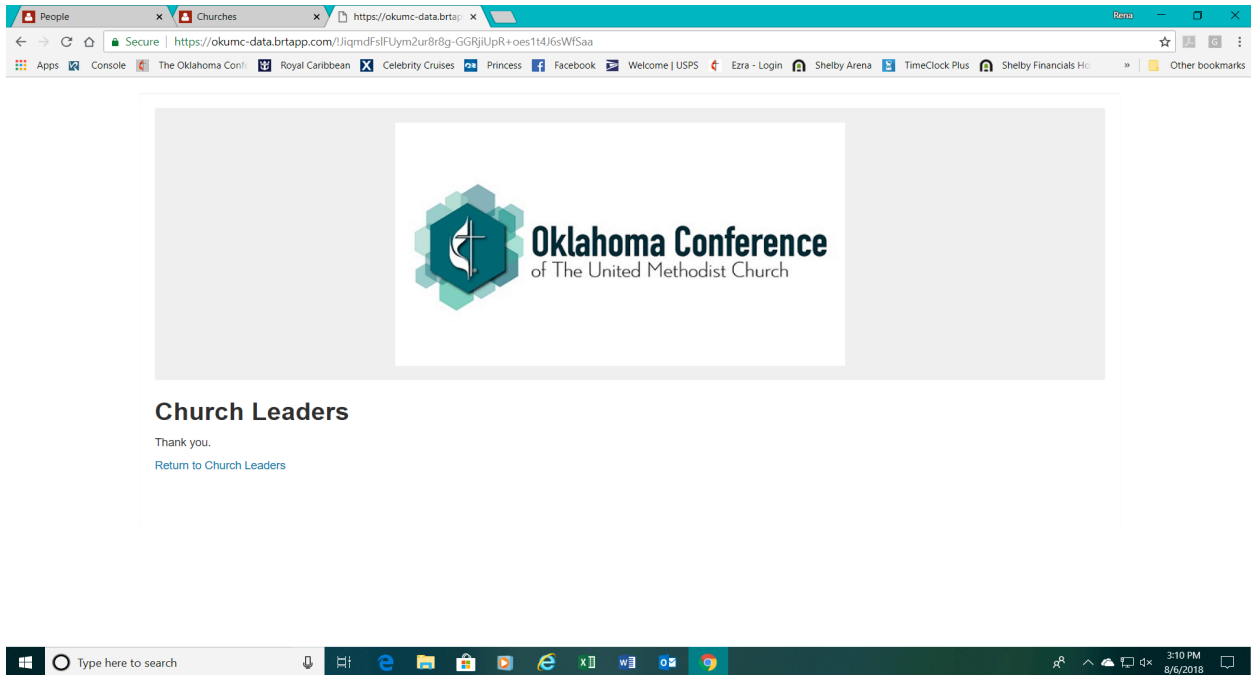
You are now back at the Church Leaders screen.

Continue editing/adding assignments until you have all the 2019 leadership entered.

CHURCH LOGIN INFORMATION

This area is used to change the login information for your church. (This login is for the church, not an individual.) If more than one person at your church accesses this program, you will need to inform them of the change. Click on the "Update" button, and the following screen will appear.

Enter the new username that you want to use, enter the new password and then re-type the new password to confirm it. Click on "Save". The choose Return to Church Dashboard. You will need to log back in using your new information. Put this information in a safe place.

CONTACTS

This area is used to maintain correct contact information for each of your local church leaders. Click on "Contacts" and the following screen will be displayed. (Please note: Even though you can add a clergy person to a leadership position, it will not allow you to edit the information If there is a change of address, phone, etc., please contact the Conference Office.)

Click on "Edit contact info" and verify that the mailing address, email address, phone number, etc. are correct. Make any necessary changes (USE ALL CAPS) and hit "Save". (Please enter the complete zip plus 4 for all addresses. To find this information, go to https://tools.usps.com/zip-code-lookup.htm?byaddress

Please ignore the button "remove from my church". If you click on it, it will tell you to end any current assignments. It is set up to remove a field that we don't use in our dashboard.

If a person is no longer a member of your church (whether they have moved or are deceased), assign them to "Generic Church Member" and put a current end date on the assignment. This will let the Conference staff know that they need to be deleted.
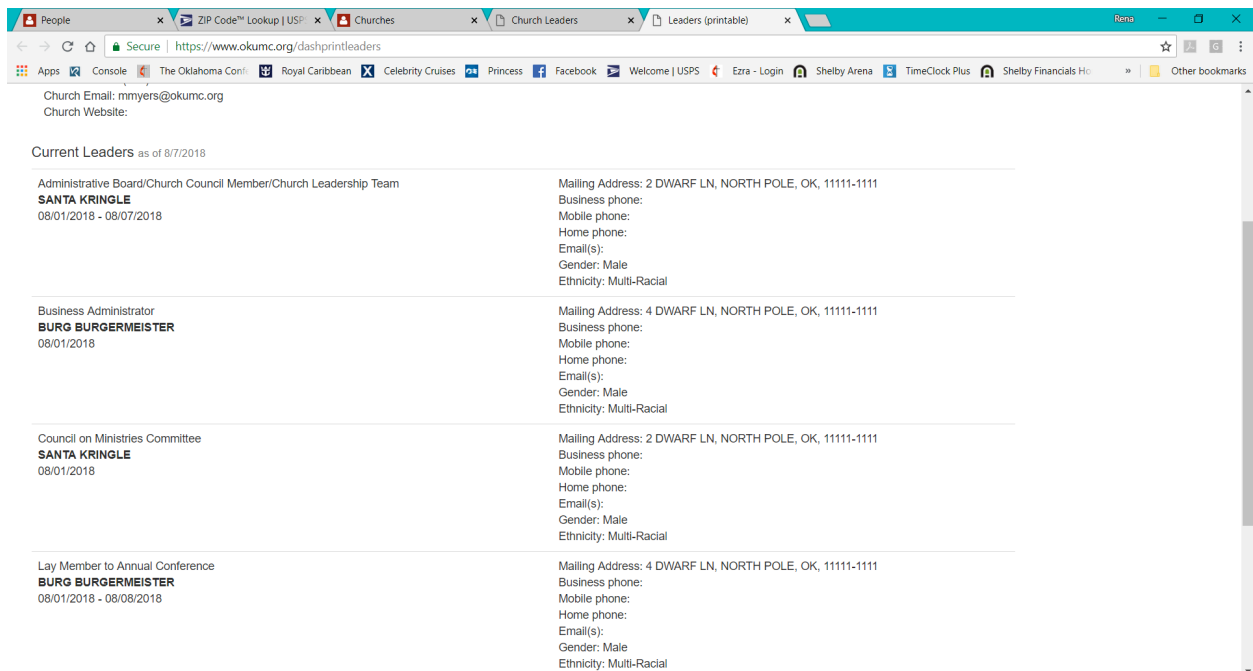
The following screen will display. Click on "Return to church contacts".
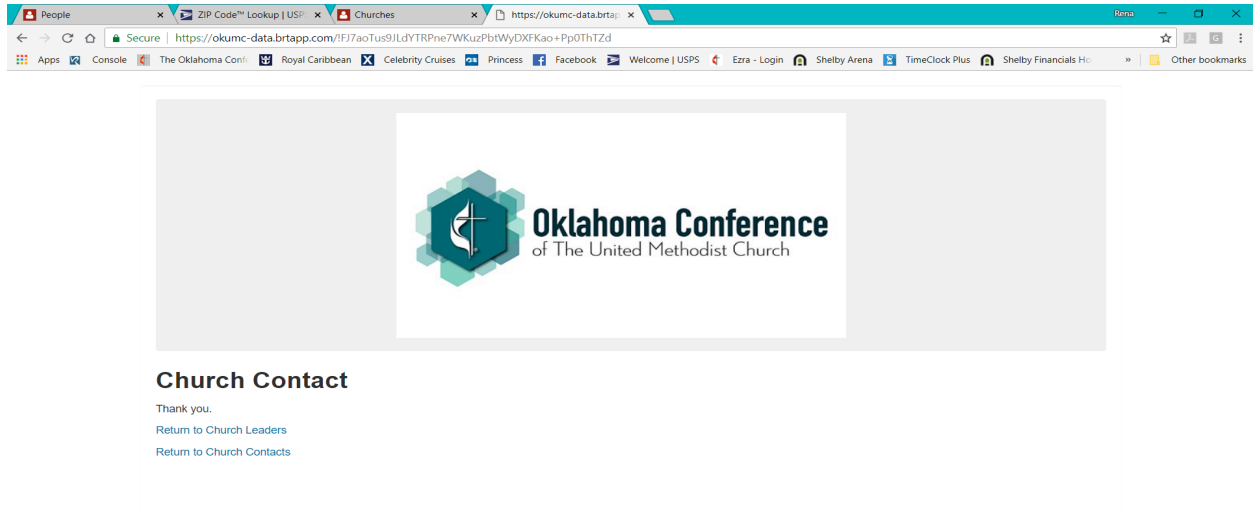
LEADERS (PRINTABLE)

Click on this link to display a printable list of all your leaders.

You can then print the list as it's displayed or download the list. <mark>It is recommended that you download and save this file for uploading into the Consolidated Charge Conference Form.</mark>

LOG-OUT

After you are finished working in the Brick River dashboard, click on "Log-Out".

You will be returned to the homepage of our conference website**.**