



Connection Management

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User Accounts

Searching for a Person *User Viewer Users*

The User Viewer provides the ability to find information about users of the website. When you go to the User Viewer, you are initially presented with a search form where you can search for users with the following criteria:

- Name
- Address
- City
- State
- Zip
- E-mail
- ID (Website user ID)
- Enabled (Is the website user account enabled)
- Class (Is the user part of GFC)

The User Viewer is shown in Figure 1.

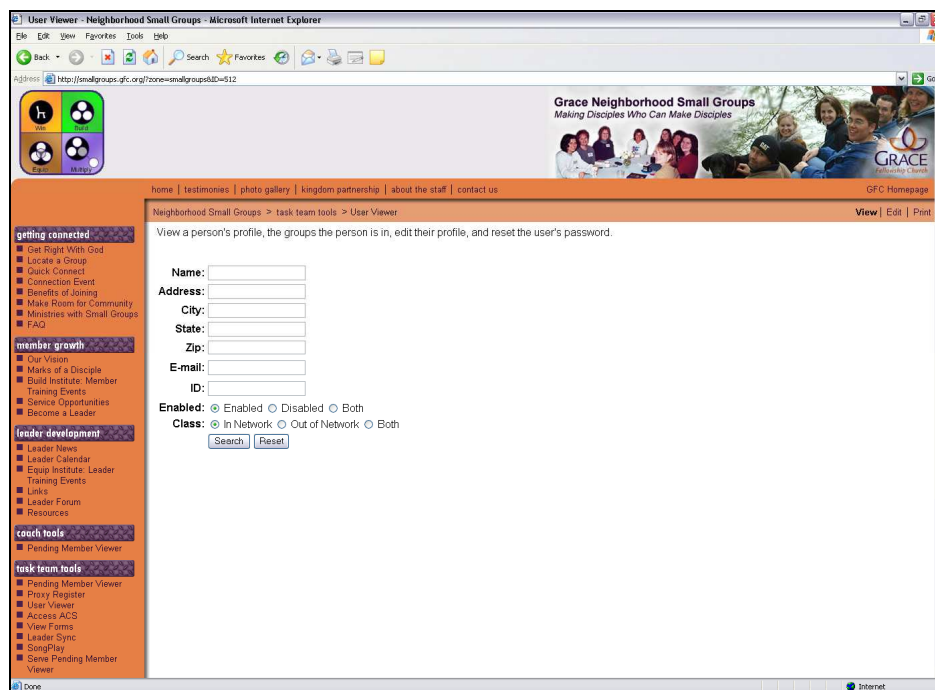


Figure 1 User Viewer

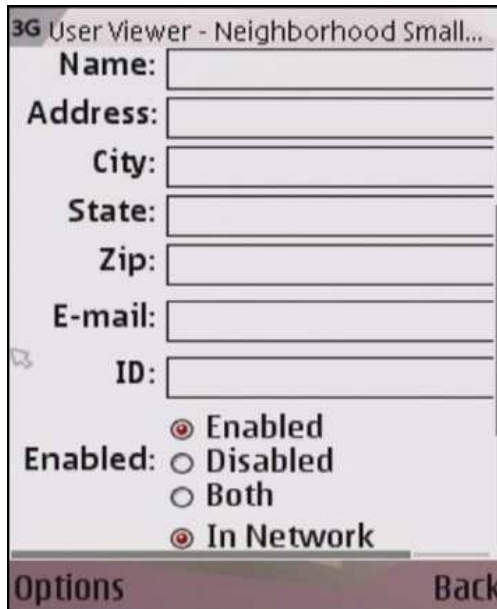


Figure 2 User Viewer on a mobile device

Fill in the criteria that you wish to search for and click on “Search”.

The results will be returned along with the ability to search again if necessary, shown in Figure 3.

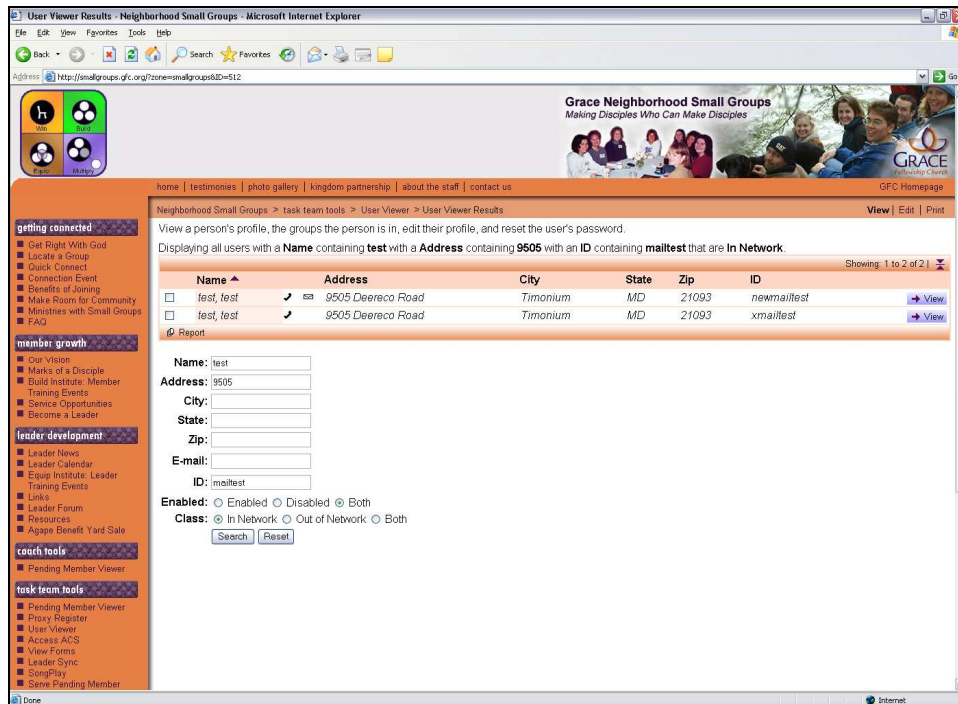


Figure 3 User Viewer Search Results

To take a look at someone’s profile in the User Viewer, click on their name.

A user can be called or e-mailed by clicking on the phone or e-mail icon next to their name.



Figure 4 Call User button



Figure 5 E-mail User button

To generate a report on the users that were returned by the search results, click on “Report”, shown in Figure 6. A subset of the users can be selected by checking the checkbox next to the users shown in the results.

The following types of reports are available:

- Export (to XML, CSV, or Text and Tabs)
- Google Map
- Mailing Labels
- Name Tags
- Picture Directory



Figure 6 User Viewer Results Report button

Viewing a Person's Profile

User Viewer Users

Once you have clicked on a user's name in the User Viewer search results, the user's profile will come up, shown in Figure 7. The following information is displayed:

- User Profile
- Picture
- Group Membership (for the current zone)
- Form Submissions (for the current zone)
- Pending Member Viewer cases (in NSG zone only)
- Serve Pending Member Viewer cases (in NSG zone only)
- Slot Assignments (for the current zone)

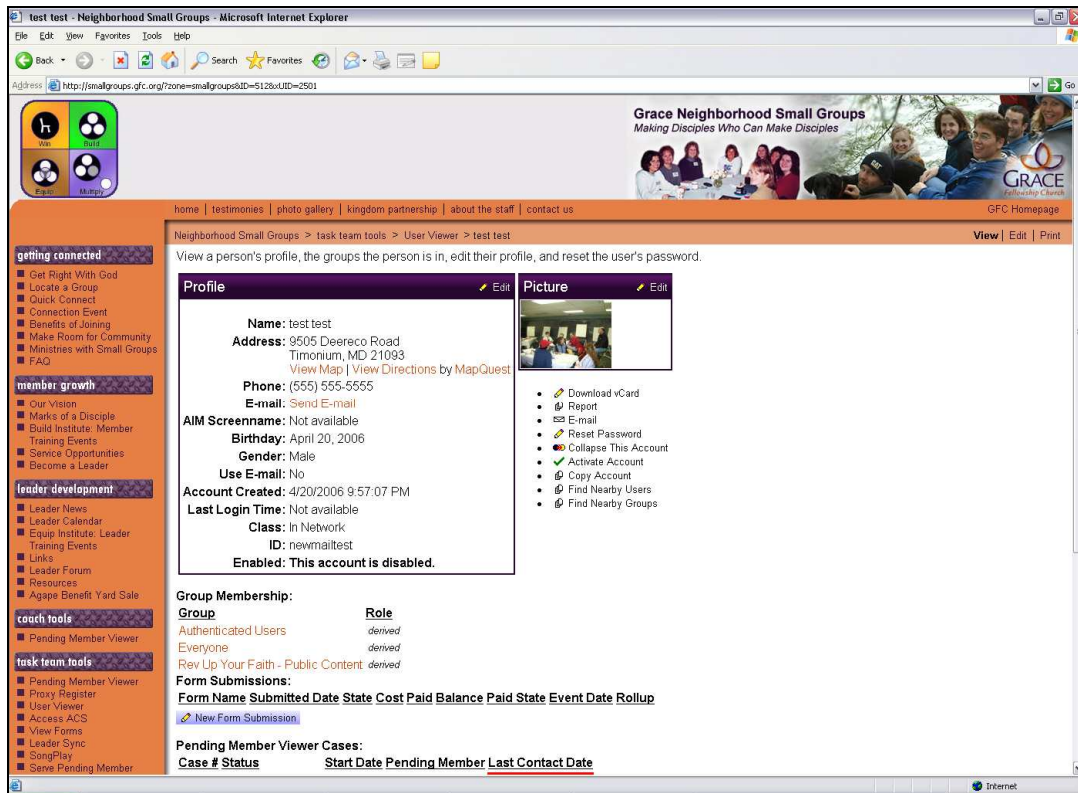


Figure 7 User Viewer User Profile

To generate a report about the user:

- Click on “Report”, shown in Figure 8.
- The following types of reports are available:
 - Label Printer Labels – Print a Label Printer Label for the selected user

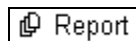


Figure 8 User Viewer User Profile Report item

Viewing a user's group membership:

A user's User Viewer profile contains the groups in the current zone that the user is a part of.

View the group profile of a group that the user is in (shown in Figure 9):

- Click on the group that you would like to view
- This will bring up the group's profile in "All Groups"



Figure 9 User Viewer Group Membership

Managing a user's form submissions:

A user's form submissions are displayed in the "Form Submissions" area of their User Viewer profile, shown in Figure 10. The following actions can be performed:

Form Name	Submitted Date	State	Cost	Paid	Balance Paid	State	Event Date	Rollup	
Baptism Signup	April 3, 2005	Attended	-	-	-	-	-	-	View Delete
Foundations	September 8, 2005	Attended	\$ 20.00	\$ 0.00	\$ 20.00	Unpaid	-	One	View Delete
Strategy Seminar	January 17, 2006	Attended	\$ 35.00	\$ 0.00	\$ 35.00	Paid	-	-	View Delete
Tracking - Connecting with God's Family	January 23, 2006	Submitted	-	-	-	-	-	-	View Delete
Coaches Directory	February 23, 2006	Processed	-	-	-	-	-	-	View Delete
Foundations	August 27, 2006	Submitted	\$ 20.00	\$ 20.00	\$ 0.00	Paid	September 17, 2006	Two	View Delete
Servant Evangelism Seminar	September 18, 2006	Attended	\$ 0.00	\$ 0.00	\$ 0.00	Waived	September 23, 2006	Large	View Delete
New Form Submission									

Figure 10 User Viewer Form Submissions

View a form submission:

- For the form submission that you would like to view, click "View"
- This will bring up the selected form in View Forms

Delete a form submission:

- For the form submission that you would like to view, click "Delete"
- When prompted if you are sure you want to delete the form submission, click "OK"

Create a new form submission:

- Click on "New Form Submission"
- This will bring up the New Submission form, shown in Figure 11. Select which form you would like to create and click "Submit"

- This will bring up the new form submission in View Forms
- Fill out the form and click “Save Form”

Figure 11 User Viewer New Form Submission

View a user’s Pending Member Viewer (or Serve Pending Member Viewer) cases, shown in Figure 12 or Figure 13:

- For the form submission that you would like to view, click “Edit”
- This will bring up the selected case in the Pending Member Viewer

Pending Member Viewer Cases:					
<u>Case #</u>	<u>Status</u>	<u>Start Date</u>	<u>Pending Member</u>	<u>Last Contact Date</u>	
1275	Not Yet Connected	5/20/2006	No	5/20/2006	Edit
641	Already Connected	10/9/2005	No	11/4/2005	Edit

Figure 12 User Viewer Pending Member Viewer Cases

View a user’s Slot Assignments:

- Each Slot Assignment is displayed in the “Slot Assignments” area of the page

Slot Assignments:	
<u>Group</u>	<u>Assignment</u>
Coach Rick Grills & Lorraine Fertsch - Weekend Connections	Sunday 1:00 PM
Coach Rick Grills & Lorraine Fertsch - Weekend Connections	Saturday 7:30 PM

Figure 13 User Viewer Slot Assignments

Finding users or groups close to a user:

- Click on “Find Nearby Users” (or “Find Nearby Groups”)
- Enter the radius around that user’s address from which to determine the results
- Click on “Search”

To generate a report based on the results:

- Click on “Report”, shown in Figure 8.
- The following types of reports are supported:
 - Export
 - Google Map
 - Mailing Labels
 - Name Tags (Find Nearby Users only)
 - Picture Directory (Find Nearby Users only)

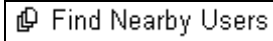


Figure 14 Find Nearby Users button

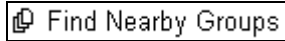


Figure 15 Find Nearby Groups button

Search for all users near **test test**.

Radius (Miles):

Enabled: Enabled Disabled Both

Class: In Network Out of Network Both

Figure 16 Radius search form

View a person's profile, the groups the person is in, edit their profile, and reset the user's password.
Displaying all users within 0.1 miles of **test test** that are **enabled** that are **In Network**.

Name	Address	City	State	Zip	ID	Distance
<input type="checkbox"/> A ,Domain	9505 Deereco Road	Timonium	MD	21093	admin	3.0529976161861e-011
<input type="checkbox"/> C ,Mary Ellen	9505 Deereco Road	Timonium	MD	21093	mconley	3.0529976161861e-011
<input type="checkbox"/> C ,Tim	9505 Deereco Road	Timonium	MD	21093	tchase	3.0529976161861e-011
<input type="checkbox"/> U ,Classified	9505 Deereco Road	Timonium	MD	21093	classified	3.0529976161861e-011
<input type="checkbox"/> W ,Bethany L	9505 Deereco Rd	Timonium	MD	21093	bwalla4	3.0529976161861e-011
<input type="checkbox"/> L ,Brandon	9505 Deereco Road	Timonium	MD	21093	blucky01	3.0529976161861e-011
<input type="checkbox"/> H ,Bill	9505 Deereco Road	Timonium	MD	21093	bhayes	3.0529976161861e-011
<input type="checkbox"/> E ,RSVP	9505 Deereco Road	Timonium	MD	21093	rsvp	3.0529976161861e-011
<input type="checkbox"/> H ,Kim	9505 Deereco Road	Timonium	MD	21093	kHeaney	3.0529976161861e-011
<input type="checkbox"/> U ,Linda	9505 Deereco Road	Timonium	MD	21093	Linda	3.0529976161861e-011
<input type="checkbox"/> S ,Alice H	9505 Deereco Rd	Timonium	MD	21093	ahsmith	3.0529976161861e-011
<input type="checkbox"/> S ,Joyce	9505 Deereco Rd	Timonium	MD	21093	jswayne	3.0529976161861e-011
<input type="checkbox"/> D ,IT	9505 Deereco Rd	Timonium	MD	21093	itdirector@gfc.org	3.0529976161861e-011
<input type="checkbox"/> L ,Sheldon	9505 Deereco Road	Timonium	MD	21093	SLargen	3.0529976161861e-011
<input type="checkbox"/> D ,Ed R	9505 Deereco Rd.	Timonium	MD	21093	DeYoung	3.0529976161861e-011
<input type="checkbox"/> D ,Welcome	9505 Deereco Road	Timonium	MD	21093	WelcomeDesk	3.0529976161861e-011
<input type="checkbox"/> N ,X Anonymous	9505 Deereco Road	Timonium	MD	21093	X Anonymous	3.0529976161861e-011
<input type="checkbox"/> D ,Laurie L	9505 Deereco Rd.	Timonium	MD	21093	Sanibel	3.0529976161861e-011
<input type="checkbox"/> M ,Tom	9505 Deereco Road	Timonium	MD	21093	TomMoore	3.0529976161861e-011
<input type="checkbox"/> D ,Laurie L	9505 Deereco Rd.	Timonium	MD	21093	Kutrie	3.0529976161861e-011
<input type="checkbox"/> S ,Jr., Earl	9505 Deereco Road	Timonium	MD	21093	ESlaybaugh	3.0529976161861e-011
<input type="checkbox"/> D ,Glenn	9505 Deereco Road	Timonium	MD	21093	GDreher	3.0529976161861e-011
<input type="checkbox"/> H ,Doreen	9505 Deereco Road	Timonium	MD	21093	proicere	3.0529976161861e-011
<input type="checkbox"/> W ,Katrina	9505 Deereco Road	Timonium	MD	21093	KWan	3.0529976161861e-011
<input type="checkbox"/> T ,Kevin	9505 Deereco Road	Timonium	MD	21093	KevinTurner	3.0529976161861e-011

Figure 17 Proximity Search results

Managing User Accounts

All Data Services Teams

The following actions can be taken for a user:

To activate a user's account:

- Click on "Activate Account", shown in Figure 18.
- When prompted if you are sure you want to activate the account, click "OK"



Figure 18 Activate Account item

To disable a user's account:

- Click on "Disable Account", shown in Figure 19.
- When prompted if you are sure you want to disable the account, click "OK"

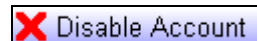


Figure 19 Disable Account item

To enable a user's account:

- Click on "Enable Account", shown in Figure 19.
- When prompted if you are sure you want to disable the account, click "OK"

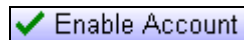


Figure 20 Enable Account item

To collapse one user account into another (if there are multiple accounts for the same person):

- Click on "Collapse This Account", shown in Figure 21.
- The "Collapse Accounts" dialog will appear, shown in Figure 22. Select the user that this account will be collapsed into and click "OK", or click "Cancel" to cancel.
- The user account that you were working on will be disabled. The Group Membership, Form Submissions, Slot Assignments, and Pending Member Viewer cases will be reassigned to the selected user account.

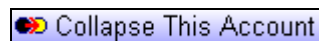


Figure 21 Collapse This Account item

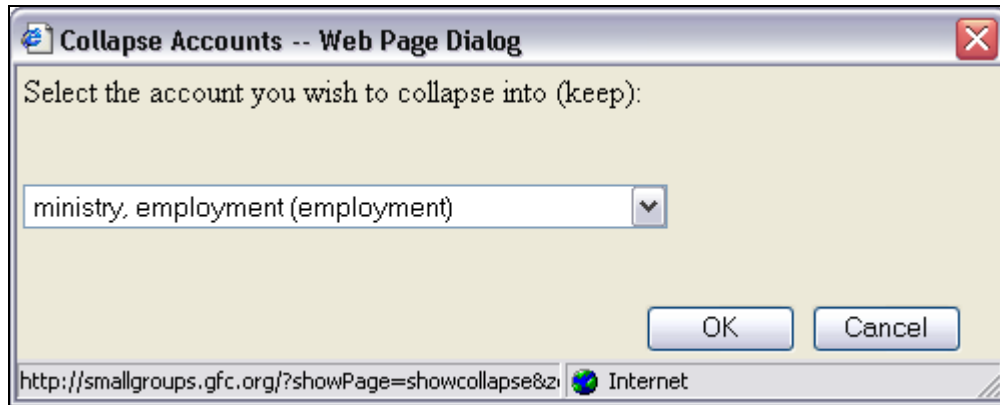


Figure 22 Collapse Account dialog

To reset a user's password:

- Click on "Reset Password", shown in Figure 23.
- This will bring up a form where the password can be reset, shown in Figure 24. Type in the new password and click "Reset Password" to reset the password, or "Cancel" to cancel



Figure 23 Reset Password item

Reset Password
New Password: <input type="text"/>
<input type="button" value="Reset Password"/> <input type="button" value="Cancel"/>

Figure 24 Reset Password area

Creating a User Account with Proxy Register

All Data Services Teams

Proxy Register is a utility for creating user accounts on behalf of someone else. This utility should be used when someone does not already have a user account and data needs to be kept on the site for that person. Proxy Register is shown in Figure 25.

Proxy Register has most of the same fields as Register, with the following differences:

- Password – In Proxy Register, a random password is generated by the system
- Class – An “Out of Network” registration denotes that the individual is not part of GFC. Additionally, “Out of Network” can be used to manually register someone who lives in a county that is not currently loaded into the system.
- Message with Reason – When a Proxy Register is performed, if the person being registered has an e-mail, an e-mail is sent to this address. To notify the person that the account was created.
- If Successful, Go to – Indicates whether to go to the profile of the newly created user account, or to reload Proxy Register to Proxy Register another person

The screenshot shows the Proxy Register form with the following fields and options:

- Desired ID:** 3-16 character username
- First Name:** (text input)
- Middle Initial:** (text input)
- Last Name:** (text input)
- Gender:** Male Female
- Birthday:** Month, Day, Year (dropdowns)
- Address:** (text input)
- City:** (text input)
- County:** (text input) - Note: If you live in Baltimore City, please enter 'Baltimore City'
- State:** MD (dropdown)
- Zip:** (text input)
- Phone:** (text input) (Type) example: 410-555-5555
- E-mail:** (text input) (Type) if you do not have an e-mail address, please contact Anita Dudek at 410-561-8424 x279 to have an account created for you
- AIM Screenname:** (text input) AOL Instant Messenger Screenname
- Use E-mail:** Yes. I check e-mail at least once a week No. I do not use e-mail or I check e-mail infrequently
- Class:** In Network Out of Network
- Message with Reason:** (text area)
- If Successful, Go to:** This User's Profile Proxy Register

Figure 25 Proxy Register

Case Management

Viewing Pending Member Viewer Cases All Connectors and All Coaches

The Pending Member Viewer displays all of the people who have used the Locator to find a group. The Pending Member Viewer is shown in Figure 26. Pending Member Viewer cases are displayed in a tabbed interface which displays cases filtered one of the following ways:

- My Cases – Cases you have been tagged to (as a Connector)
- Unassigned – Cases no one has been tagged to (as a Connector)
- In My Region – Cases involving one of your groups or one of the subgroups of your group
- Without A Region – Cases not involving any group
- Pending Closure – Cases where a person has been indicated to be a committed member of a group awaiting administrative closure
- By Assignee – Cases displayed by Assignee
- All Cases – Displays all cases

The screenshot shows a web browser window titled "Pending Member Viewer - Neighborhood Small Groups - Microsoft Internet Explorer". The page header includes the logo for "Grace Neighborhood Small Groups" and navigation links. The main content area is titled "Pending Member Viewer" and features a tabbed interface with the following tabs: "My Cases", "Unassigned", "In My Region", "Without A Region", "Pending Closure", "By Assignee", and "All Cases". Below the tabs is a table with the following columns: "Case #", "Person", "Status", "Start Date", "Group", "Group Status", and "Last Contact Date". The table contains 20 rows of data, with some rows highlighted in red and others in yellow. The table also includes a "Showing: 1 to 30 of 1507" indicator and a "Show Closed Connection Attempts" link.

Case #	Person	Status	Start Date	Group	Group Status	Last Contact Date
2033	Noel W	Not Yet Connected	6/12/2007	Charles / Ann Edwards - Ruxton	In Progress	6/12/2007
2032	Tasha W	Not Yet Connected	6/11/2007			6/11/2007
2031	Stella D	Not Yet Connected	6/10/2007			6/10/2007
2030	Susanne H	Not Yet Connected	6/10/2007			6/10/2007
2028	Tim A	Not Yet Connected	6/10/2007			6/10/2007
2028	Cara M	Not Yet Connected	6/10/2007			6/10/2007
2027	Dan K	Not Yet Connected	6/10/2007			6/10/2007
2026	Kelsha G	Not Yet Connected	6/9/2007			6/9/2007
2024	Angel M	Not Yet Connected	6/7/2007			6/7/2007
2021	John G	Not Yet Connected	6/3/2007			6/3/2007
2015	Michael M	Not Yet Connected	5/29/2007			5/29/2007
2013	edward m	Not Yet Connected	0/0/0	Judy O'Brien - Federal Hill	Not Right Fit	None
			0/0/0	Judy O'Brien - Federal Hill	Not Right Fit	None
			0/0/0	Judy O'Brien - Federal Hill	Not Right Fit	None
2011	Pam S	Not Yet Connected	5/27/2007	Phil / Bonnie Wilhelm - White Hall	In Progress	5/27/2007
2008	chnessa m	Not Yet Connected	5/25/2007			5/25/2007
1997	DAVID W	Not Yet Connected	5/21/2007			5/21/2007
1995	Phil L S	Not Yet Connected	5/20/2007			5/20/2007
1986	Flaby A	Not Yet Connected	5/16/2007			5/16/2007
1985	Lisa S	Not Yet Connected	5/15/2007			5/15/2007

Figure 26 Pending Member Viewer

The following information is displayed in the Pending Member Viewer:

- Case #
- Person
- Status – overall status for the case
- Start Date
- Group – a group that the person is interested in. For cases where a person has expressed interest in multiple groups, their case will span multiple lines in the table

- Group Status – status for a particular group
- Last Contact Date – last time there was activity regarding the case

By default, the Pending Member Viewer only shows open cases. To display all cases regardless of whether they are open or closed:

- Click on “Show Closed Connection Attempts”

To generate a report on the Pending Members being displayed:

- Click on “Report”

The supported reports for the Pending Member Viewer include:

- Export (to XML, CSV, or Text and Tabs)

To display the details for a particular case:

- Click on “Edit”

Displaying cases by Assignee

To see the cases for a particular Assignee:

- Click on the “Cases By Assignee” tab. This displays all Assignees, shown in Figure 27.
- Click “Edit” on the desired Assignee. This displays the cases that are assigned to that Assignee. From this point, the output is similar to the other tabs.




Name	Cases	
Domain Administrator	4	 Edit
Anita Dudek	1	 Edit
J Boss	0	 Edit

Figure 27 View Cases by Assignee

Viewing a Particular Pending Member Viewer Case All Connectors and All Coaches

A case within the Pending Member Viewer is shown in Figure 28.

The display for an individual case displays the following information:

- Details (Case status)
- Profile (User profile)
- Case Assignment (Connectors associated with this case)
- Group Membership (Groups the user is already part of)
- Pending Group Membership (Groups the user is in the process of joining)
- Master Case Log (Information about a case as a whole)
- Case Log for Group (Information about a case regarding a particular group)

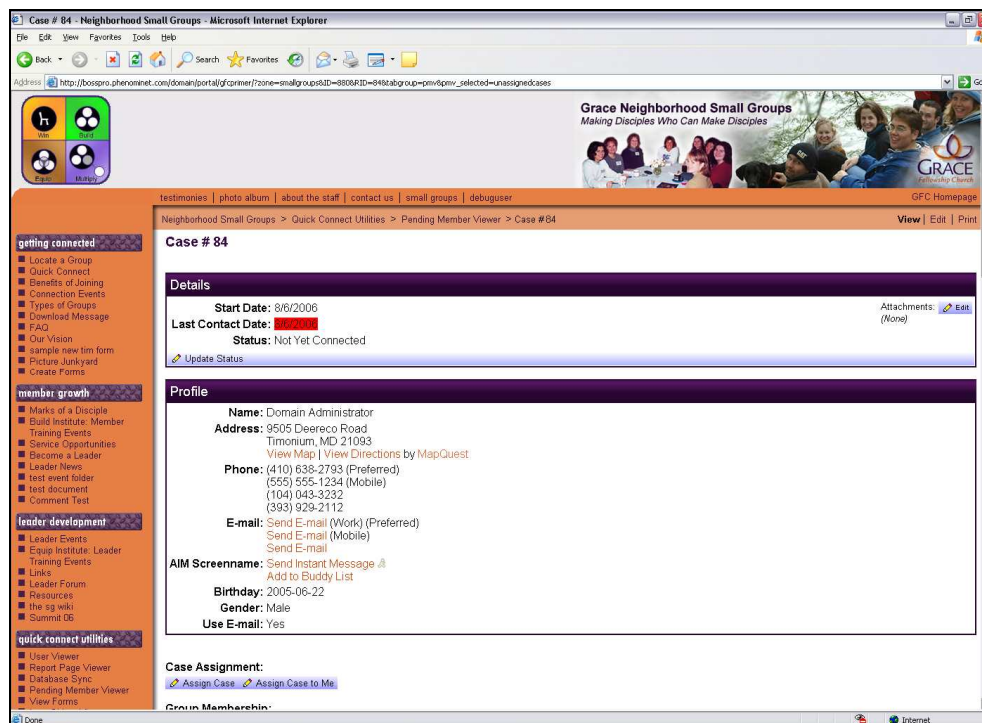


Figure 28 Pending Member Viewer Case

The Pending Member Viewer displays the groups that a user is a member of and the groups that a user is a pending member of, shown in Figure 29 or Figure 30.

To display the group profile for a group or pending group:

- Click on the group's name

To e-mail the moderators of a group or pending group:

- Click on "E-mail Group Moderators"
- This will bring up a new window which will contain the message

To use the Proxy Locator with the same search parameters as were used to select the group:

- Click on “Proxy Locator”



Figure 29 Pending Member Viewer Group Membership

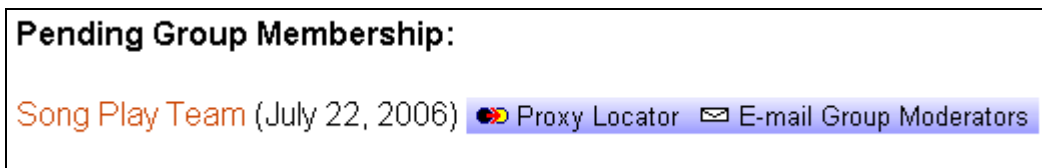


Figure 30 Pending Member Viewer Pending Group Membership

Assigning Cases

All Connectors

Cases are managed by connectors that are assigned to cases. A case can either be taken by a connector or assigned to a connector.

To assign a case to yourself:

- Click “Assign Case to Me”, shown in Figure 31.

To assign a case to a Connector:

- Click “Assign Case”, shown in Figure 31. This will bring up a form with the list of Connectors, displayed in Figure 32.
- Select the desired Assignee and click “Assign”, or “Cancel” to cancel

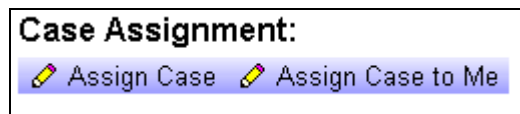


Figure 31 Pending Member Viewer Case Assignment



Figure 32 Pending Member Viewer Select Assignee

Managing the Master Case Log and Group Case Logs

All Connectors and All Coaches

The Master Case Log and Group Case Logs display the status of a case. The Master Case Log contains information that is not tied directly to a particular group, such as search results from the Locator. The Master Case Log is shown in Figure 33 and a Group Log is shown in Figure 34. If a search was performed by the Proxy Locator, the line will contain “PROXY:” to indicate this.

To add an entry to a Case Log:

- Click on “Add Entry”
- Follow the steps of the wizard and fill in the appropriate answers regarding the contact attempt, shown in Figure 35. This process is similar to adding an entry for a pending member from All Groups

To decline a pending member :

- Click on “Decline”
- Follow the steps of the wizard and fill in the appropriate answers. This process is similar to declining a pending member from All Groups

Master Case Log:	
02/05/2007 09:33:15 PM EST	Displaying the closest groups to your address of type Couples, Family / Singles mixed, Food service, Mixed [Ages 30+], Service/Task Team, or Singles [Ages 35+] participating in Thirty Discipleship Exercises
02/05/2007 09:33:54 PM EST	Displaying the closest groups to your address
02/05/2007 09:34:53 PM EST	Displaying the closest groups to your address
02/05/2007 09:35:25 PM EST	Displaying the closest groups to your address
02/05/2007 09:35:39 PM EST	Displaying the closest groups to your address
02/05/2007 09:35:53 PM EST	Displaying the closest groups to your address



 Add Entry  Proxy Locator

Figure 33 Pending Member Viewer Master Case Log

Case Log for Group: Song Play Team	
Status: <i>In Progress</i>	
07/22/2006 11:26:31 PM EDT	Requested information about Song Play Team



 Add Entry  Decline

Figure 34 Pending Member Viewer Group Log

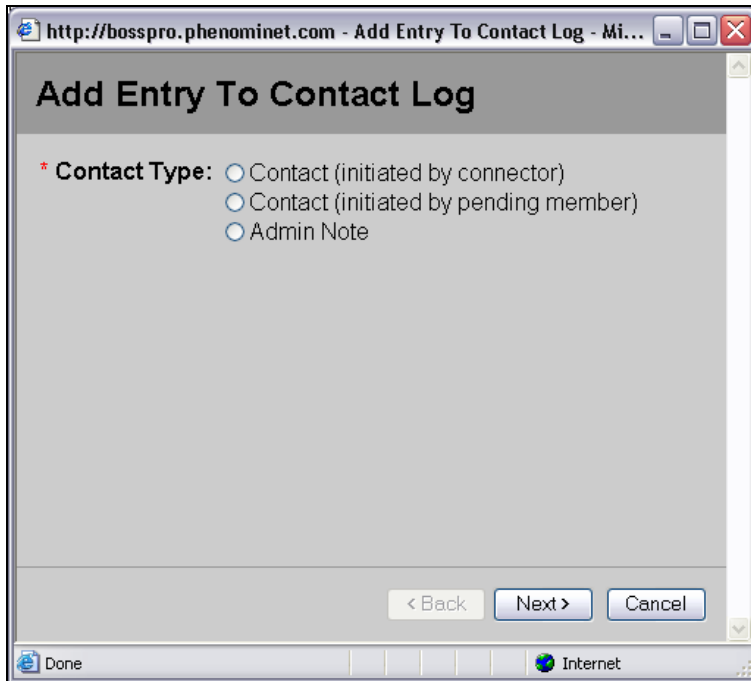


Figure 35 Add Entry to Contact Log dialog

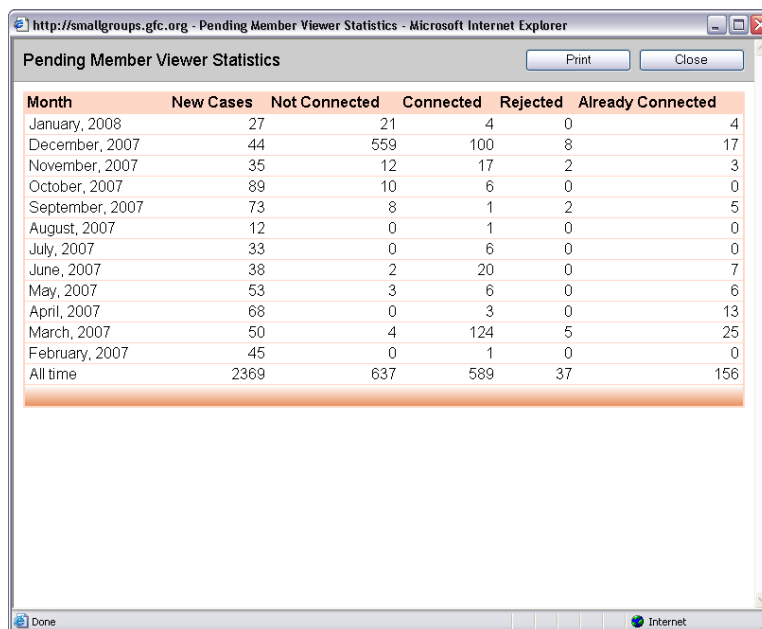
Viewing Pending Member Viewer Statistics *All Connectors and All Coaches*

The Pending Member Viewer has the ability to generate statistics to track how well the connection process is progressing. This report displays the number of new cases for each of the last 12 months, plus the total for all time.

To display Pending Member Viewer statistics:

- Click “Report”
- Select “Statistics”
- Click “Next”
- Click “Finish”

The statistics will display in the browser window.



Month	New Cases	Not Connected	Connected	Rejected	Already Connected
January, 2008	27	21	4	0	4
December, 2007	44	559	100	8	17
November, 2007	35	12	17	2	3
October, 2007	89	10	6	0	0
September, 2007	73	8	1	2	5
August, 2007	12	0	1	0	0
July, 2007	33	0	6	0	0
June, 2007	38	2	20	0	7
May, 2007	53	3	6	0	6
April, 2007	68	0	3	0	13
March, 2007	50	4	124	5	25
February, 2007	45	0	1	0	0
All time	2369	637	589	37	156

Figure 36 Pending Member Viewer Statistics