New York Conference Church Dashboard
User Guide

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Church Dashboard Introduction

The church dashboard is a web-based program developed by Brick River Technologies that allows churches to update leadership and church information. The leadership updates take the place of the previous online Charge Conference Summary Form; the church information updates what appears in the “Church Locator” on the conference web site.

The dashboard gives churches the opportunity to add leaders and update contact information directly into the conference database, allowing the conference and district offices the ability to directly communicate important information pertinent to your church leaders based on their leadership position.

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 Barbara Eastman (website@nyac.com) in the conference office.

Logging In

The log-in screen for the dashboard is located here: http://www.nyac.com/dashboard

Use your church GCFA number without the first zero as both your username and password.

If you don’t know your GCFA number, it can be found in the statistical section of the Journal (column 1): https://www.nyac.com/files/websites/www/NYAC_2017_Journal_Section14.pdf
Church Dashboard Home Page

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

- Contacts (Edit People Associated with Your Church)
- Leaders (Add New Contacts and Add/edit Contacts with Leadership Positions/Assignments within Your Church)
- Charge Conference Leadership Report (printable)
- Church Information
- Login Information
- Dashboard Manual
- Log-out

Charge Conference Reporting Process

The process for adding your church contacts and their leadership positions (assignments) has been simplified. You do this in two simple steps (detailed below):

1. Edit existing contacts (in the Contacts section)
2. Add new contacts; add and edit those contacts’ assignments (in the Leaders section)

Editing Existing Contacts

In order to assign a person to a leadership position, they first need to be in the database with their correct contact information.

Click Contacts in the left navigation.

Review the list of contacts to determine if anyone’s information needs updating.

Please note: Although you can add a clergy person to a leadership position, you cannot change any of their contact information. If their contact information is incorrect, notify Barbara Eastman at website@nyac.com. This way, we can update all of our systems in the conference office.
Edit existing contacts

Click the **Edit** button to the left of a person’s name to verify/update mailing address, email address, phone number, etc. Make any necessary changes (DO NOT USE ALL CAPS) and click **Save**.

Removing contacts from your church

If a person is in the Contacts area for your church, and they should no longer be listed (moved, transferred, died, etc.), click the link **remove from my church**. This will not delete them from our database, it will “unlink” them from your church.

New contacts

If a person is new to leadership assignments in your church, please see the next section on adding new contacts.
Add Contacts, Church Leaders/Assignments

This area allows you to add new people, and to input your church leadership assignments 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. This printable list takes the place of the Charge Conference Summary Form – you will need to print this out for your district superintendent and bring to your Charge Conference.

Although this is called the Charge Conference Leadership Report, each Contact should be listed with their primary church. These leadership positions are assigned on a church basis. For charges/parishes with shared committees such as Staff-Pastor/Parish Relations Committee, list each person in their primary church only; do not add them to each church in the charge/parish. Please log out of the first church, then log in to the next church to make your updates.

The leadership assignments we would like you to provide are listed here; those that are required are indicated with an asterisk*

Board of Trustees – Church
Board of Trustees Chair – Church*
Camping & Outdoor Ministry Coordinator - Church
Candidate for Ministry - Church
Certified Lay Servant (formerly Lay Speaker) - Church
Children’s Choir Leader - Church
Choir Director - Church
Church Secretary/Admin Ass’t - Church
Church/Admin. Council Chair – Church*
Communications Chair - Church
Council on Ministries Chair or equivalent - Church
Education/Church School - Church
Education/Church School Superintendent - Church
Evangelism Chair - Church
Finance Chair – Church*
Finance Committee - Church
Lay Leader – Church

Lay Member of Conference – Church*
Local Lay Servant (formerly Lay Speaker) - Church
Missions/Outreach Chair - Church
Native American Ministries Representative - Church
Nurture - Church
Organist - Church
Praise Band Leader - Church
Reserve Lay Member of Conference - Church
Safe Sanctuaries Coordinator - Church
Staff/Pastor-Parish Relations Chair – Church*
Staff/Pastor-Parish Relations Committee - Church
Stewardship Chair - Church
Treasurer – Church*
United Methodist Men President - Church
United Methodist Women President - Church
Worship Committee Chair - Church
Young Adult Contact - Church
Youth Contact – Church

Suggestion: You can print a list of all current leadership assignments for review prior to editing and adding assignments for the year. Click the Charge Conference Leadership Report (printable) and print that page.
Adding a new contact and leadership position

If the contact is not currently in the database, you won’t see them on the Contacts page, but you can easily add them in the Leaders section.

To add a new person to a leadership position, click the green Add New Assignment button.

Choose the position in the drop-down list.

If the person you are adding to a leadership position is not in the list that appears, enter the person’s last name in the Search field.

In the example above, the name “Smith” was entered in the search field. The screen shows that there are about 155 people with “smith” in their name in our conference database. Since the list is too long, add their first name to the search field the narrow the list.

If the person you were looking for did not come up, scroll to the bottom of the list, and click Add a brand new person to our database.
Fill in as much information as you can about this person. Most important are email and mailing addresses. Suffix means, Jr., Sr., III, etc.

When adding contact information, please use upper and lower case letters (NOT ALL CAPS); for addresses please use abbreviations with no punctuation, e.g. St, Ave, Hwy; phone numbers should be entered in the following format xxx-xxx-xxxx.

Remember to click **Add new contact and create assignment** at the bottom when you are finished.

This takes you to a page where you add the detail of the assignment: **start date is the only required field.**
Edit existing assignment

Click Leaders in the left navigation and this page will display.

In this area, you can enter/edit all of your church’s leadership assignments.

The assignments previously provided to the conference via the Charge Conference Summary Form will appear here.

To close an existing assignment (changing the end date is the only change that gets made when editing an existing assignment), click the green Edit Assignment button.

This screen will appear.

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 blank, they will continue in this position. If you change it to 12/31/2018, for example, this person will continue in that assignment position in our database until that date.

To end (close) this assignment; change the end date to today’s date (or the day when they stopped serving in this position).

If the person has been elected to a different leadership assignment, you’ll need to create a new assignment – you cannot select a different leadership assignment in an existing record.

Put an end date on this record and click Save.

Add new assignment to an existing person

The instructions are the same as when you add a new person to a leadership assignment. Click here for those instructions. The only differences are that when you click the Add New Assignment button, you find the person in the list of contacts, and click the Pick this Person button, then follow the instructions above.

The only required field is the start date.

Be sure to click Save when you are finished.
Choose the end date of the assignment if this leadership assignment is part of a class, i.e. for the Board of Trustees and the Staff/Pastor Parish Relations Committees. These class assignments are typically listed for the current year and two years in the future. So, a person in the Class of 2019 would be given an end date of 12/31/2019 and 2019 gets typed into the Class of field.

Click Save.

Continue editing/adding assignments until all the leadership assignments have been entered for the year. When you are finished, click Leaders. This page will show you any required leadership positions that you may have missed. If you are completely finished, please click the big blue button, I am done!

Charge Conference Leadership Report (printable)

This is the report that you will bring to your Charge Conference to provide the list of your church leaders to your district superintendent.

When you click this link, you can choose to print the list as it’s displayed.

You can also download the list of current assignments or future assignments. These will download a .csv file which can be saved in Excel.
**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 any changes you make.

Click 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 **Save**. Put this information in a safe place.

**Submit an Event**

Using this form, you can provide information about an event at your church. These events will appear as a link on your church’s detail page in the church locator and on the district page of events.

Follow the on-screen instructions.

Once submitted, your event will be reviewed and posted to the web site.
Log Out

After you are finished working in the dashboard, click Log-out in the left navigation. You will be returned to the homepage of our conference web site.

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