shelby**arena**

Online Help

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Table of Contents

Welcome **6**
Introduction **7**
The Community **9**
Technical Support **14**
Dashboard **15**
Quick Search **19**
Membership **22**
White Pages 22
Add New Family 25
Person Bulk Update 33
Merge Members 38
Me (Person Detail Page) 42
Active Campaigns 89
Metrics 91
New Background Check 97
Background Check 101
Reports 110
Family Registration 115
Mailing 126
Public Lists and My Lists 153
Membership FAQ's 172
Groups and Tags Overview **184**
Tags **187**
Personal and Ministry 189
Serving 213
Event 224
Groups **300**
Group Trees 301
Add Registration 321
Areas 325
Reports 330
Volunteer Tracking **334**
Add Volunteer 334
Serving Tags 337
Volunteer Administration 340
Reports 345
Service View 346
Team Member Details 361
Web Portal Service View 363
Service List 366
Blackout Dates 367
Service Opportunities 369
Promotions **373**
New Promotion Request 373
Public Calendar 377
Web Requests 377
Bulletin Requests 378
Newsletter Promotions 379
All Promotion Requests 380
Communications **382**
New Communication 383

SMS Communication 394
Previous 396
Templates 398
Approve Emails 399
Prayer **402**
Add Prayer Request 403
Approve Requests 405
Approve Answers 406
Approve Comments 407
All Prayer Requests 408
Reports 409
Web Content **410**
Polls 410
Classifieds 411
Newsletters 413
Photo Albums 420
E-Cards 423
Podcast Channels 425
Check-In **431**
Attendance Type Categories 433
Attendance Types 438
Labels 443
Check-In Print Settings 445
Occurrences 451
Locations 453
Kiosks 455
Monitor 458
Check-In Themes 460
Implementation 461
iPad Setup 475
Contributions **477**
Fund Management 477
Contribution List 480
Batch List 489
Repeating Payments 503
Reports 509
Print Contribution Statements Example 510
My Lists and Public Lists 511
Contribution Entry 511
Enhanced Contribution Entry 520
Pledges 528
Pledge Manager 529
Pledge Quick Entry 531
Projects 534
Honorariums 535
Email Statements 537
Import From Gateway 538
Contribution Analysis 539
Check Scan 540
Installing your Scanner 545
Financials Integration 548
Assignments **556**
Assignment Types 556
Assignment Entry 565

Workflow 570
Missions **573**
Mission List 573
Headquarters **594**
Institutions 594
Appointments 607
Administrator Manual **613**
Self-Hosted Updates 613
Dashboard Ideas 614
Counseling 615
Member's Responsive Portal 617
Responsive Group Leaders Toolbox 621
Implementing Specific Features 623
Membership 623
Prayer 625
Groups 626
Tags 626
Serving Tags 627
Event Tags 628
Volunteer Tracking 629
Communications 631
Check-In 633
Contributions 634
Missions 636
Assignments 636
Classifieds 637
Website Structure 638
Portals 638
Portal Separation 641
Portal Security 641
Making Publicly Accessible 642
Volunteer Web Portal Requirements 643
New Portals 645
Pages 645
Visibility 647
Inherited Attributes 648
Importing and Exporting 648
Page Security 648
Child Pages 649
Templates 651
Modules 654
Module Settings 656
Person Specific Module Settings 659
Module Security 660
Arena V2 Settings 662
Security 662
Roles 664
Person Detail Field 677
Security Templates 680
Application Security 683
Metric Security 684
Configuring Arena 685
Arena Hub 685
Organization 690

Campus ... 696
Agent Management ... 700
Automation Agents ... 703
Email Configuration ... 707
System Emails ... 709
Payment Gateways ... 712
Report Services Configuration ... 712
Reports ... 712
Editing in Report Builder ... 712
Report Manager ... 715
Report Registration ... 722
Small Group Structure ... 723
Facilities Management ... 730
Campaign Administration ... 732
Application Settings ... 733
Check-In ... 734
Contribution ... 736
Family Registration ... 738
Mailing ... 740
Mailing Remittance ... 741
SMS Text Messaging ... 742
Background Checks ... 744
Protect My Ministry ... 745
System Emails ... 749
Agent ... 751
Utilities ... 755
Tags to Attributes ... 755
Resize Person Photos ... 755
Person Import ... 756
Auto Adult ... 756
Feed Formats ... 757
Application URL/Public URL ... 759
Customizing Arena ... 764
Person Attributes ... 765
Application Settings ... 771
Document Types ... 773
Lookups ... 775
Lookup Type Values ... 775
Edit ... 776
Create ... 777
Custom Field Groups ... 779
Create ... 779
Delete ... 783
Relationship Types ... 783
Add Relationship Types ... 784
Peer Types ... 786
Create Peer Types ... 787
List Configuration ... 789
List Types ... 790
List Tables ... 792
Criteria Controls ... 793
Attribute Groups ... 798
List Categories ... 800
HTML from Stored Procedures ... 802

Report Query from SPROC 808
Administration 812
Active Directory Configuration 813
API Applications 813
Exceptions 815
Refresh Cache 816
Implementing Website Features 817
Making Your Website Public 817
Page Structure 818
Required Pages 818
Importing/Exporting Pages 819
Inherited Attributes 820
Visibility 820
Member Logins 820
My Membership 827
My Membership Page 829
Optional User Confirmation Module 830
Online Giving 831
My Payment Profiles 840
Pledge Entry 843
Online Volunteer Opportunities 844
Online Events and Promotions 847
Online Event Calendar 852
RSVP Event with No Fees 852
Event with Sub-Events and Registration Fees 855
Small Group Locator 859
Group Leader Toolbox 861
My Small Groups 865
Online Missions 868
Online Prayer Requests 875
Prayer Ministry Toolbox 877
Online Newsletters 879
Newsletter Pages 880
Online Polls 884
Online Classified Ads 885
Online E-cards and E-invites 889
Online Sports Monitor 890
Podcasts 891
Giving Kiosk Portal 894
Mobile Portal 901
New Account Request 913

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Compiled 10/15/2020 2:42 PM - Version 2400.1.100

Arena - the Power of Community

Arena is a **Church Ministry System** that empowers your staff and your ministries by:

- An easy-to-use and centralized method for your members to contribute (financially and physically) to ministries
- Keeping accessible, accurate, thorough, and integrated member records
- Organizing records by levels and layers of grouping schemes
- Tracking members' physical and spiritual needs and activities
- Coordinating ministry events through promotions and Arena-managed websites
- Providing an effective means of personal and mass communication

This makes Arena a true ChMS product. It focuses on Communication, Coordination, Connection, and Creativity. Because the Arena philosophy is people oriented, it begins with the end in mind and not let people slip through the cracks. Open the front door wider and close the back door tight. Take advantage of every touch point with a "wow" experience. Arena empowers you to invest more of your time and talent in the calling, less in the managing. Arena puts the power at your fingertips.

Users can access Arena via any browser (e.g., Internet Explorer®, Google Chrome®, Safari, Firefox®, etc.). For day-to-day access, any browser works with Arena as long as the browser is current and certified for Arena. Check with the Arena Support for version validation and if compatibility view is required. For some specific functions, Internet Explorer® is required such as click-once applications like Check-In, Mailing and Family Registrations (Self-hosted only). This is due to the .NET framework.

Information relevant to Arena Administrators is included in this help file. This help file also encompasses all information related to self-hosted and hosted Arena clients. Anything applicable to only self-hosted or hosted clients is duly noted or noted in parenthesis i.e. (Self-hosted only). While this help file serves as a guide for overall understanding of Arena's functions, you can also access additional information on the Arena Community website.

Our Mission

Shelby Systems exists to supply the software and services needed to help ministries and organizations around the world thrive.

Trademarks: Certain brand names and product names used in this publication are trade names, service marks, trademarks, or registered trademarks of the respective owners. Shelby Systems, Inc. is not affiliated or associated with any product or vendor mentioned in this publication.

The Shelby Education Department is responsible for Arena Help files and we welcome your feedback. Please email feedback and suggestions to educationdepartment@shelbyinc.com.

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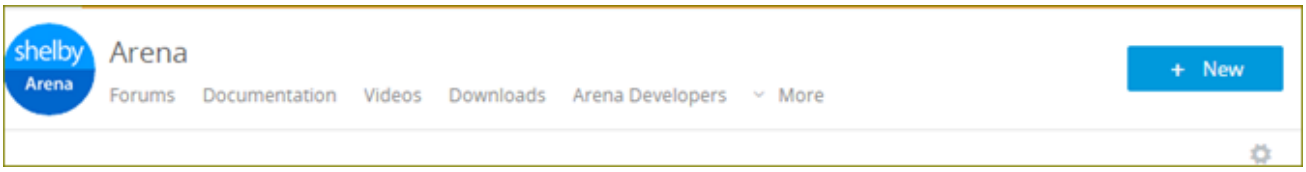
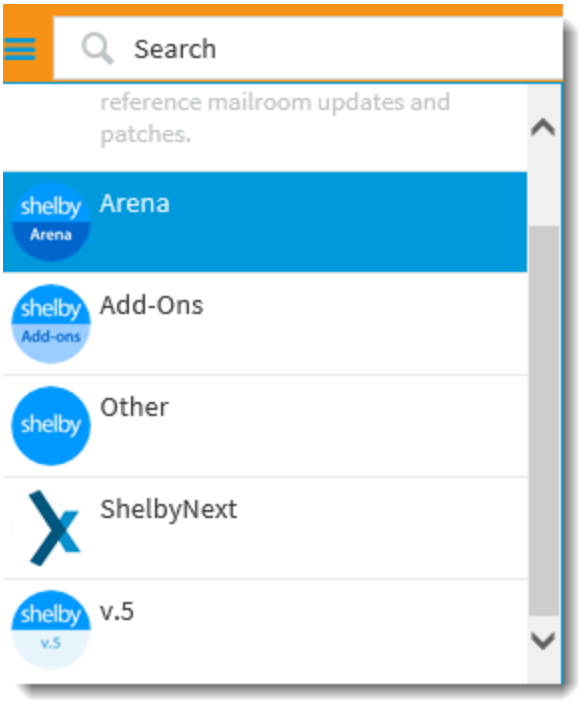
The Community

The Community is available to all Shelby v.5 and Arena Administrators and maybe a member of your finance and web teams. This website is a central place for Arena Administrators and Arena Staff to share ideas of how they are leveraging Arena for their organization and where we post announcements. (Contact the Arena Project Manager regarding access.)

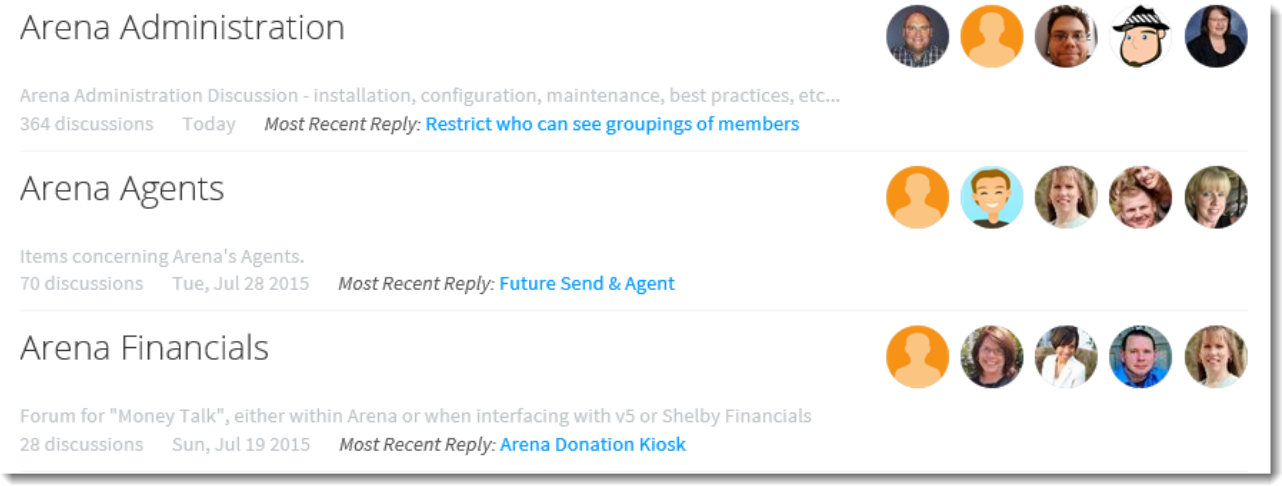
Use the top filters to narrow results. Use the **My Subscriptions** tab to subscribe to topics of interest to you. Once you subscribe, emails are sent to you as new threads are posted.



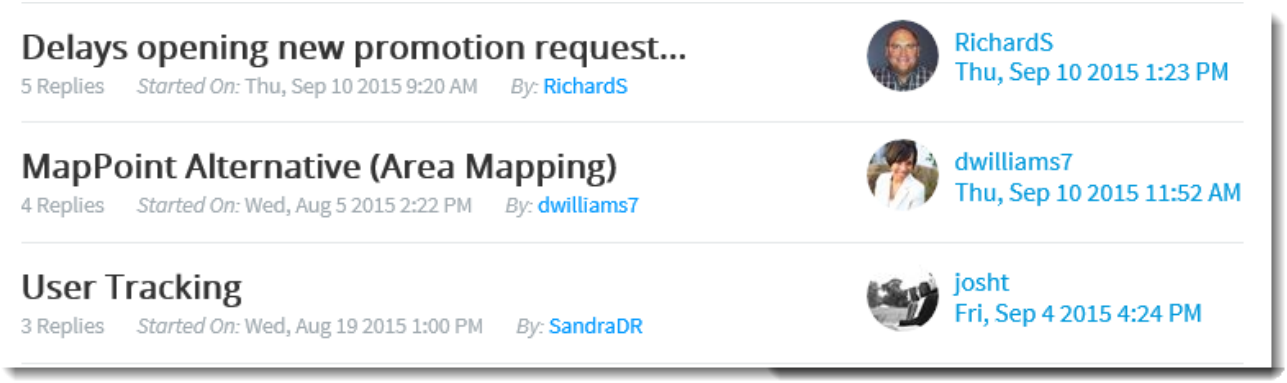
Search – Use this field to search for specific content. Use the product filter to narrow results.



Forums – Use this page to search for topic specific information posted by other Arena organizations and Shelby Arena staff.

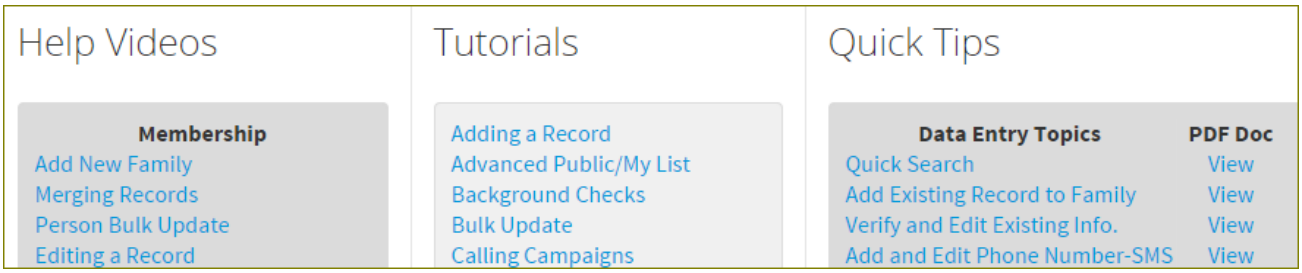


After selecting a topic, a list of current threads display. You can select any thread to read all thread posts or add your own thread post.

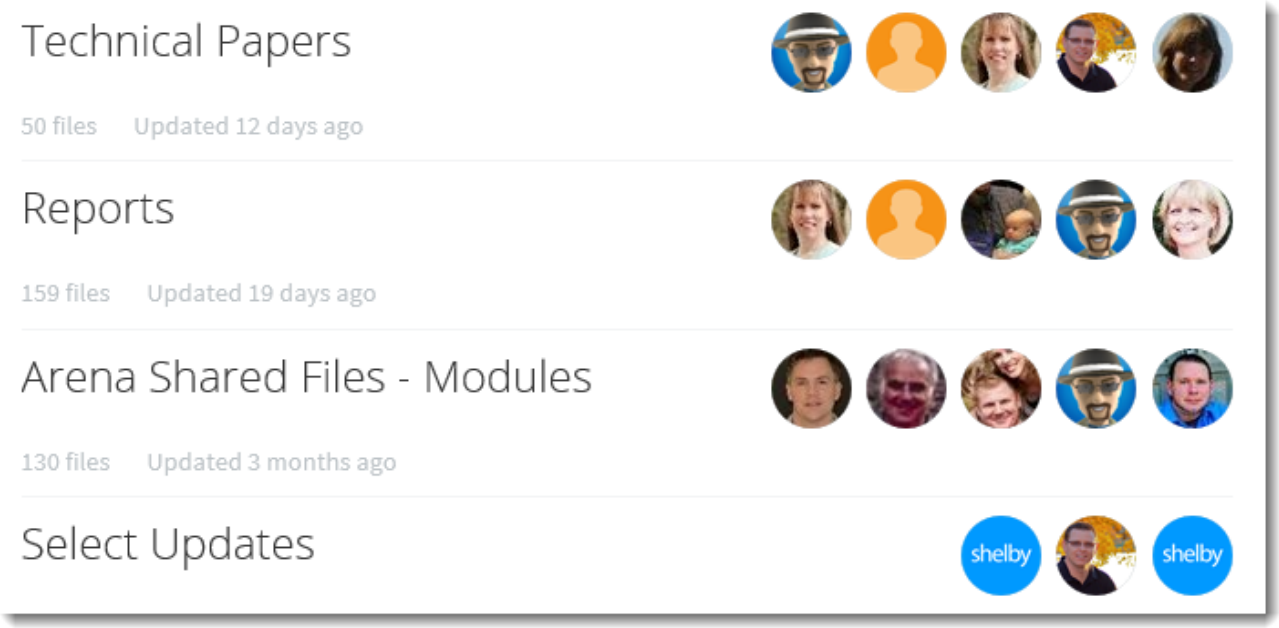


Select the **Documentation** tab to download documents such as manuals from previous releases and table layout files.

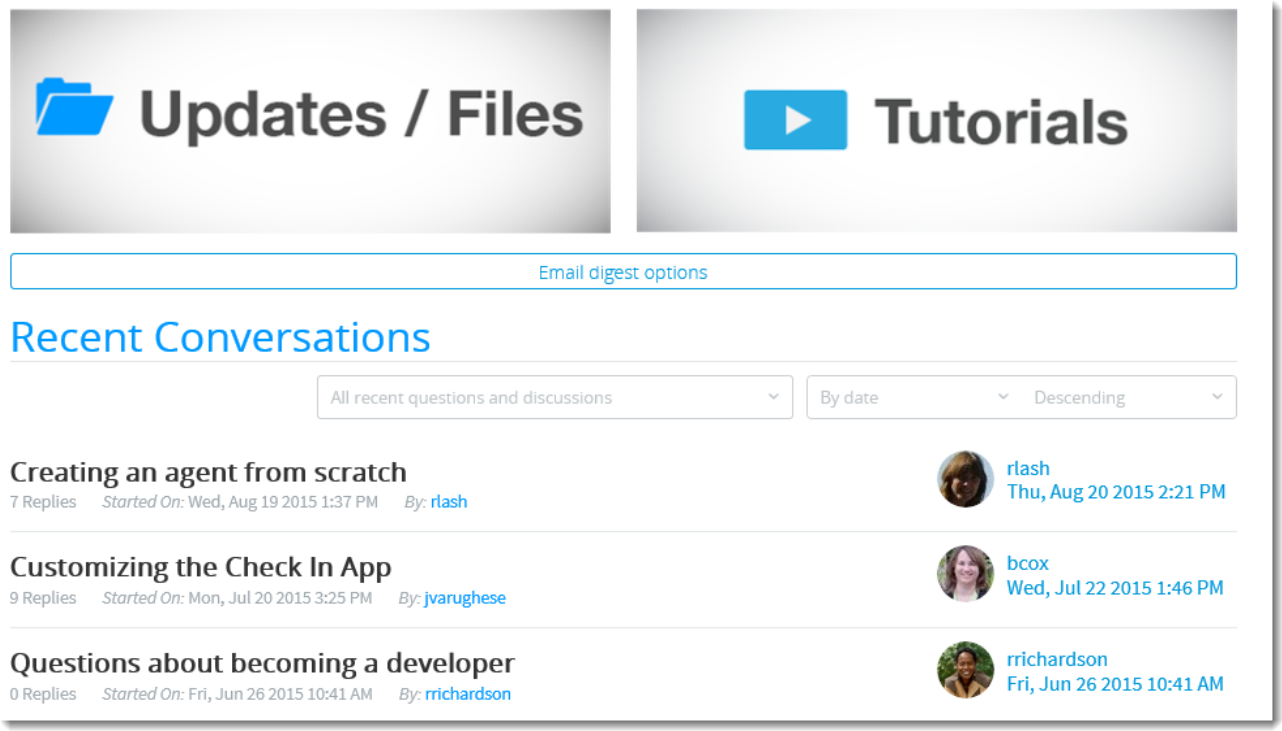
Select the **Videos** tab to access training videos.



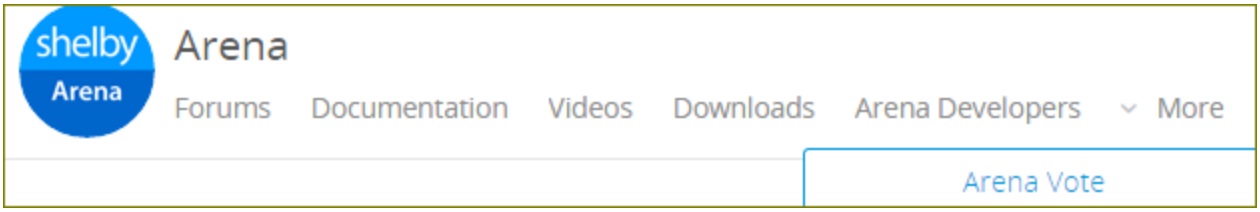
Select the **Downloads** tab to access download files such as updates, technical papers, reports, and shared modules.

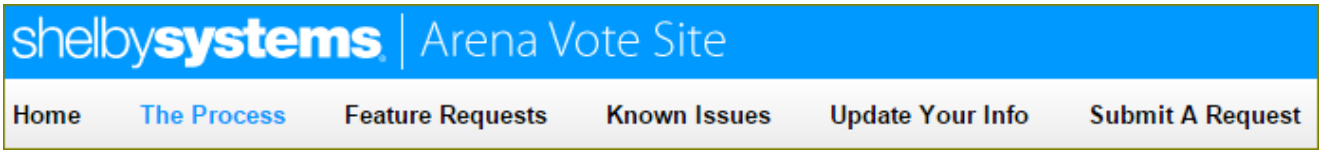


As a Developer client, you can access developer forums and files.



Under the **More** tab, you can access the **Arena Vote** page where you can access feature requests, review known issues, update your information and submit a feature request. Be sure to read the guidelines for feature requests on **The Process** page.


shelby
Arena
Arena
Forums
Documentation
Videos
Downloads
Arena Developers
More
Arena Vote


shelbysystems | Arena Vote Site
Home
The Process
Feature Requests
Known Issues
Update Your Info
Submit A Request

Shelby Arena Support

shelbysystems

(888) 697-4352

Monday-Friday

7am-6pm (Central Time)

fax **(901) 259-3018**

arenasupportemail@shelbyinc.com

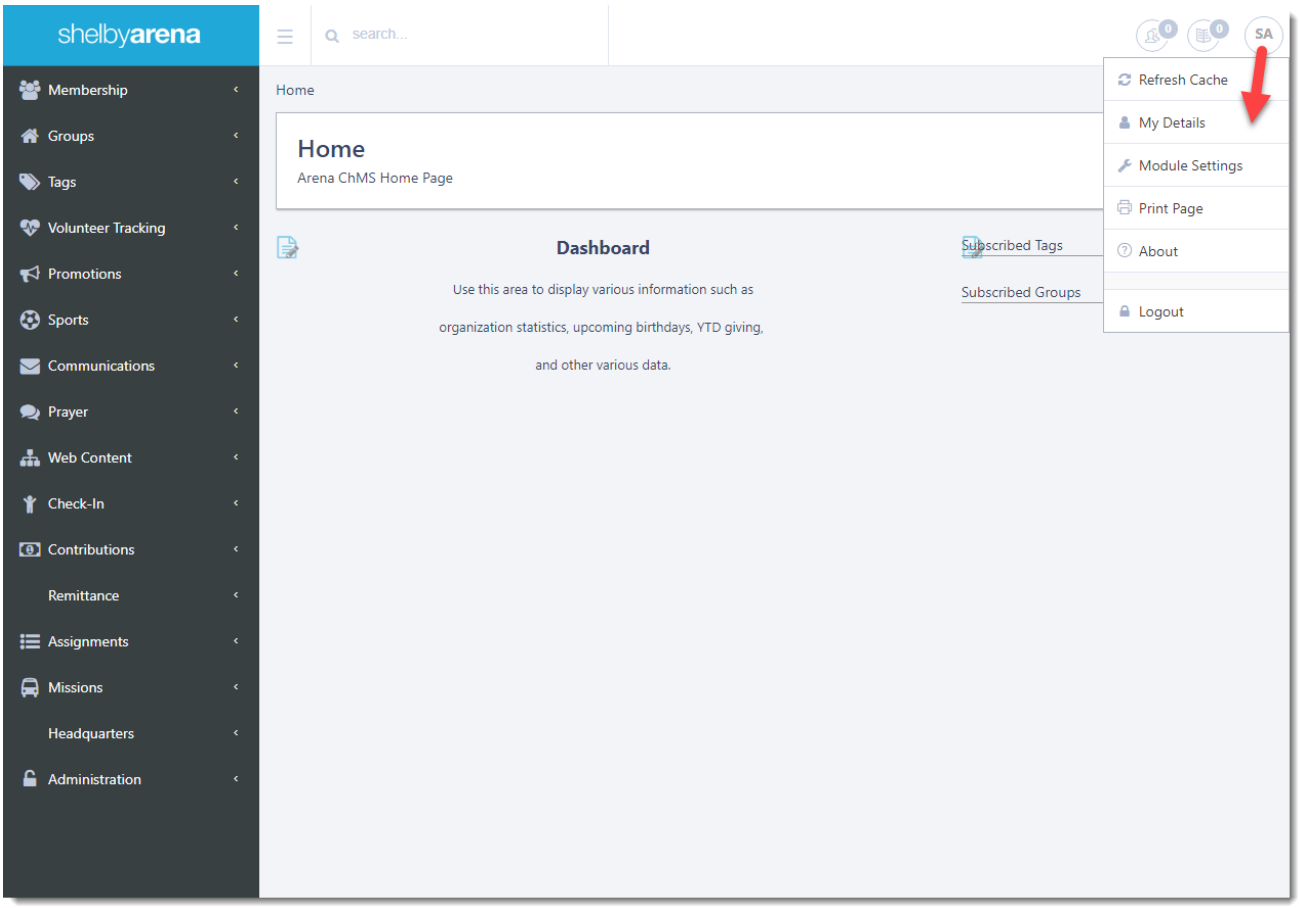
community.shelbysystems.com

To provide you with the best assistance possible, please provide us with the following information when contacting support:

- The version of your operating system (e.g., Windows 10) including service packs.
- The browser you are using to access Shelby Arena (e.g., Internet Explorer 11).
- The sequence of your actions leading to the problem.
- Please try to mention as many relevant details as possible.

Dashboard

Arena's default home page consists of several navigation bars allowing users access to specific features. The navigation area may vary by user. Even though Arena's home page consists of several default navigation bars, your Arena Administrator can add additional elements to easily provide information to you such as staff birthdays and organization statistics.



Top Navigation:

- shelbyarena Click "shelbyarena" to return to the home page at any time.
- Click the menu icon to collapse or expand the the Left Navigation Menu.
- search... Enter your Quick Search criteria.
- **Subscribed Groups** - The first number following each Group name represents "In Process" status group registrants. The second number represents "Connected" status group registrants.
- **Subscribed Tags** - The first number following each Group name represents "In Process" status group registrants. The second number represents "Connected" status group registrants.

  The first number following a Ministry Tag represents "In Process" status tag members. The

second number represents “Connected” status tag members.

The first number following a Serving Tag represents the serving tag members with specified Tag Status for prospective volunteers. The default is No Contact but can be customized for your organization. The second number represents prospective serving tag members where the tag status has not been changed in the specified number of days. Specified days are Organization Settings set by your Arena Administrator. The third number presents the number of serving tag members that have the “Connected” Tag Status. Connected Tag Status is considered to reflect tag members whom are currently engaged and serving in the respective position.

- Click the "User Icon" to access the following:
  - **Refresh Cache** - Refresh Cache is a process that updates stored system values within Arena, such as security rights, lookup values, module settings, etc.
  - **My Details** - Opens your Profile Information page.
  - **Module Settings** - Quick link to module settings.
  - **Edit Page Details -** Quick link to page settings.
  - **Print Page** - Prints the active page.
  - **Help** - Link to online help for the content on this page. This can be installed from the Help Topic URLs found in the Arena Hub under Administration.
  - **About** - Displays product version information.
  - **Logout**

Breadcrumbs: Provide a trail for you to follow back to the starting or entry point. While reverse navigation using breadcrumbs is recommended, on some pages you can elect to click the browser back button.

Left Navigation Menu: Displays primary features of Arena. Click any feature button to display child pages for that features. Available pages may vary by user.

Right Navigation: Provides user-specific links to Groups, Tags, and Assignments. Click the link of any Group/Tag to display that Group/Tag. Click the ***Assignment*** link to display the assignment details. Groups and Tags links include numbers that represent participant status in the respect Group/Tag.

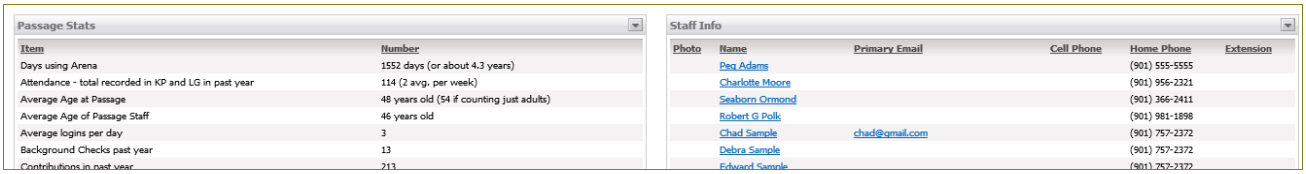
Customized the **Dashboard** to display a variety of information such as staff birthdays and organization statistics.

Dashboard Ideas

Use the home page of Arena, or any other page to provide organization wide or ministry specific information. While the opportunities are vast, security can be set so that specific staff have access

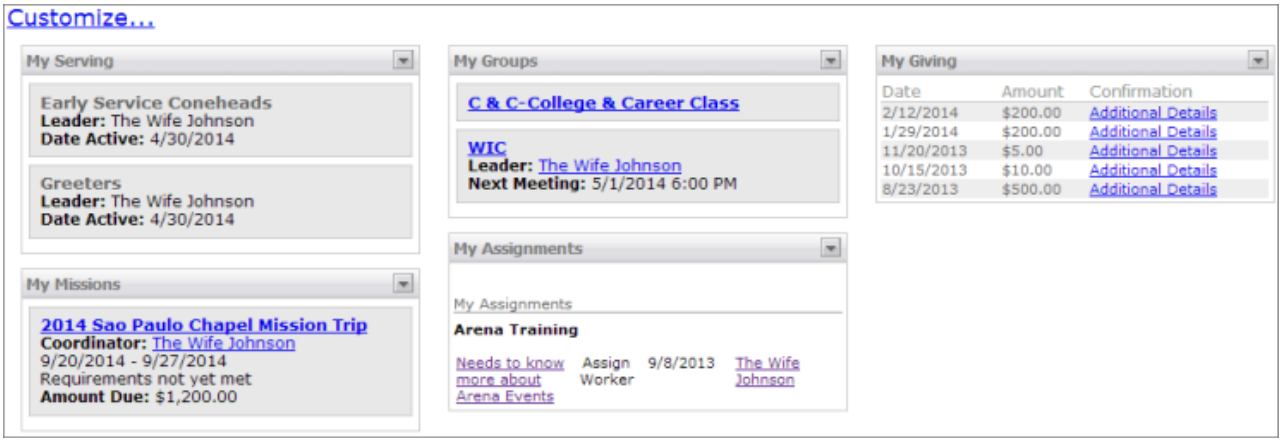
to specific information. The following are some examples, using the available modules.

- This is an example of using the **2-Dock Container** module with two separate Report Grid from Query modules to display specific information and statistics.

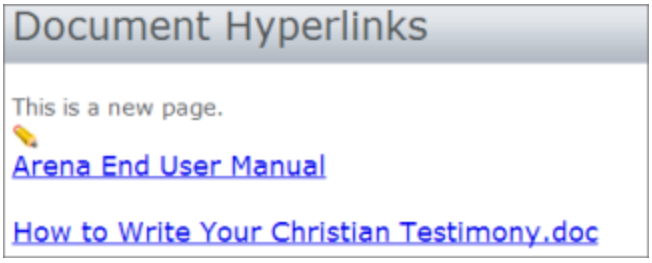


- This example uses the **Dock-3 Container** module, **Pages as Tab** module and the **Report Viewer** module to organize reports by ministry. You can apply security to each tab so that staff can access the specific reports based on area of ministry.

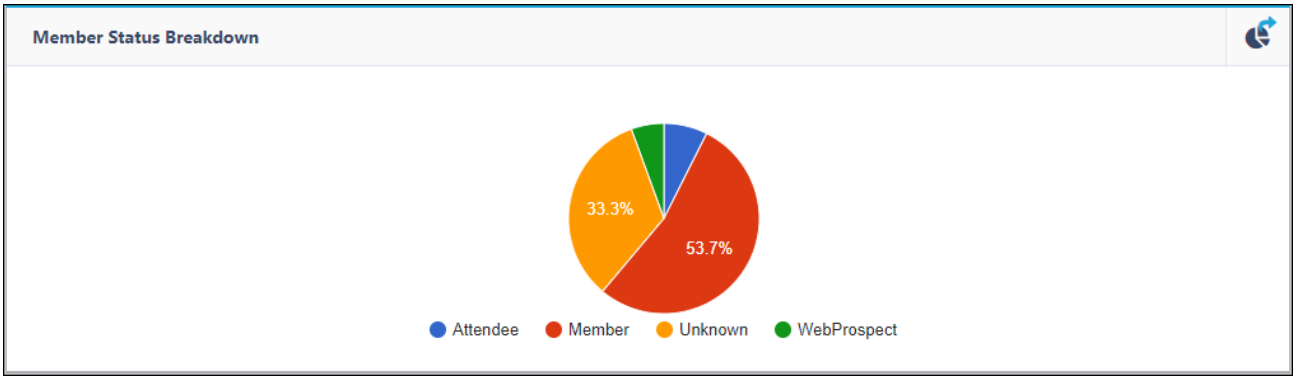
- This example uses the 3-dock container module and several of the Social modules to provide individual information.



- This example uses the **Advanced HTML** module and **Hyperlink Manager** within the module to create links to documents.



- This example uses the **Chart from Query** module using a Stored Procedure SQL query to display a **Pie Chart**. The query is required to return a single table with x_value (text value), and y_value (numeric value).



Example Chart SQL:

```
CREATE PROC cust_a91114_chart_members AS
BEGIN
        SELECT  L.lookup_value AS [x_value], COUNT(P.person_id) AS [y_value]
        FROM    dbo.core_person P
                INNER JOIN dbo.core_lookup L ON P.member_status = L.lookup_id
        GROUP BY L.lookup_value
END
```

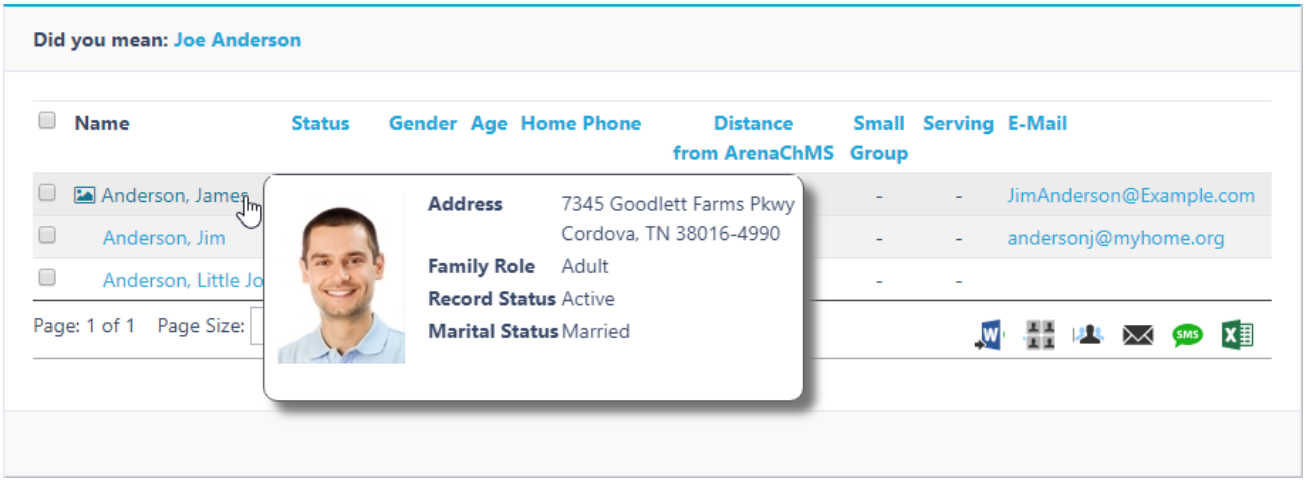
Quick Search

The Quick Search box is located in the upper left-hand corner. It can be used to search for a record by any part of the first name, nick name, last name, previous name, company or Arena record ID. Companies use only the last name field. Arena searches for any active or inactive record.

Enter your search criteria in the **search...** box and then press the **Enter** key.

NOTE: Use a comma to search for first names. (e.g. ",James" or "Anderson, James"). Use the percent (%) wild card in replacement of several characters and the underscore (_) wild card in replacement of any single character (e.g. "A%son", "%son", or "A%s_n"). Wild cards can be used individually or together.

The results are listed below in a grid. Hover over a name to see a quick view.



The following columns are displayed on the page:

- **Name**: Click the ***Name*** link to open a record.
- **Status**: displays the person's member status.
- **Campus**: If using multi-campus, the column displays the **Campus** of which the person is associated.
- **Gender**: Displays Male, Female, or Unknown.
- **Age**: Displays the calculated age based on the birthdate.
- **Home Phone**: Displays the person's main/home phone number. For records with no land line, it is common practice to enter the main cell in the family main/home phone field.

- **Distance from <Organization name>:** Displays the distance of the person's primary address is from the organization. Distance is a straight line, not directional.
- **Small Group**: Displays the **Small Group** icon if the person is in at least one group. Click this link to display the first group listed on the **Person Detail** page.
- **Class Level**: If using, the **Class Level** column displays the 'class' the person has completed. If using the Class Level, create a Tag for the 'Member Class,' add the Tag ID to the Class Level Organization Setting, create an Attendance Type Category and Attendance Type(s) for each class. Class Levels are determined by Attendance Type order for the Attendance Type Category with the highest-level class being the entry-level class and the lowest being the final class.
- **Serving**: Displays the **Serving** icon if the person is in a serving tag. Hover over the icon to display the number of hours the person is currently serving.
- **E-Mail**: Displays the preferred email address.

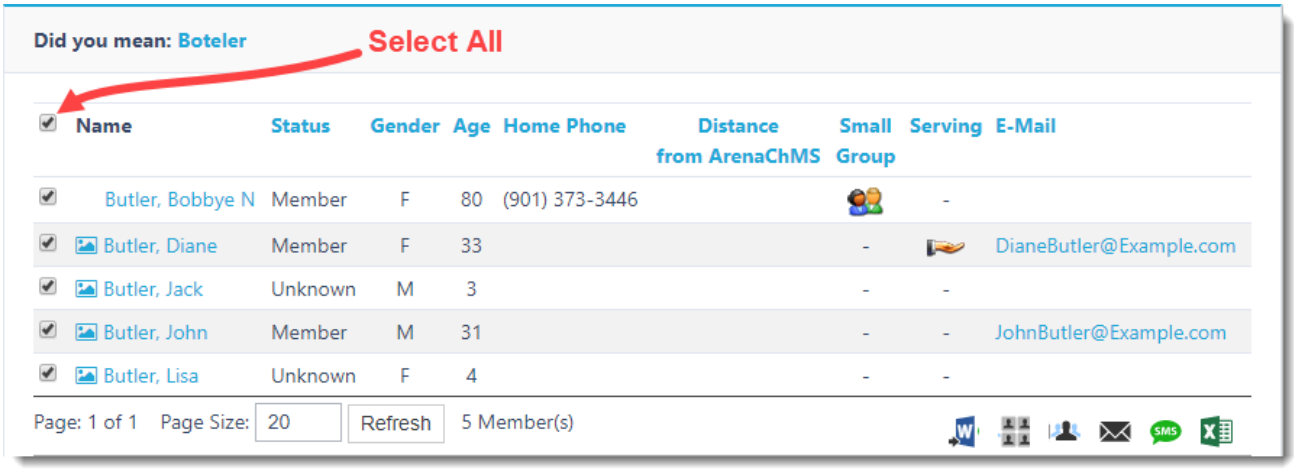
Click the column header of any underlined column header to sort by a single column across all pages. An **Ascending** icon or **Descending** icon displays to indicate your sort choice. Click multiple times to toggle between ascending and descending order for any single column.

The **Page Size** field displays the number of items to display on the page. The default page size is 20 items. Change the page size by entering the number of items to display and then click the **Refresh** button. The number to the right of the **Refresh** button displays all records that meet the search criteria across all pages if the items exceed the page size.

Selecting Records

Use the check boxes to select records to use with the **Word® Merge**, **Bulk Update**, **Merge Members**, **Email**, **SMS** or **Excel®** export icons on the bottom right of this page.

If you do not select any records, then all records across all pages are used. Select the top box to the left of **Name** label to select all records on that page.



NOTE: To select specific records across multiple pages, change the page size to display all records. (Page size is user specific and applies to all pages, until you change the page size again.)

After selecting names, click one of the icons at the bottom of the page to initiate the corresponding options. The options are listed below:

- Click the **Word** icon to mail merge selected records with an available document. (Your Arena Administrator can modify the list of available documents.)
- Click the **Bulk Update** icon to update all selected records through Person Bulk Update.
- Click the **Merge Member** icon to merge selected records into one record.
- Click the **Send Email** icon to send an email to selected records through Arena Communications.
- Click the **SMS Message** icon to send a SMS Message to selected records.
- Click the **Excel** icon to export selected records to Excel. When exporting to Excel, all fields from the active page exports in addition to default fields. Required fields are set in List Configuration.

Membership

The Membership section displays several pages where you can execute an advanced search, enter new individuals, families and companies, bulk update records, merge records, view the Person Detail page of the current user, run a calling campaign, display metrics, run reports, manage background checks, and create and view lists. If necessary, click Advanced Search to display additional search criteria options.

White Pages Advanced Search

Use White Pages to search for records using advance search criteria. If your organization is multi-campus, you can **Filter by Campus**. You can also select to Include Inactive and Pending Records. In addition to these filter options, you can search by one additional criteria on this page. Use Lists to search by multiple criteria. Records that match any single search criteria display on a **Search Results** page. Consider using the "%" and "_" wild cards for unknown multiple or single characters.

NOTE: You can control which filters appear by clicking the **Edit Settings...** link in the upper right-hand corner.

Home / Membership / White Pages

White Pages

Person Search

Global Options

☐ Include Inactive and Pending Records

By Name

First Name: First Name

Last Name: Last Name

Go...

By Member Status

Member Status:

Go...

By Email

Email: Email

Go...

By Phone

Phone: Phone

Go...

By Address

Address: Street Address

Go...

By Proximity

Proximity: Miles

Miles from address: Street Address

City: City

State / Postal Code: Sta | Postal Code

Go...

By Ministry Tag

Ministry Tag: (not set) ...

Go...

By Serving Tag

Serving Tag: (not set) ...

☑ Only Connected

By Events

Events: (not set) ...

Go...

Search by **Campus** and by **Record Status** in addition to one advanced search field.

Use the **Last Name** field only to search by individuals and businesses. *Businesses use the last name field.*

Use the **Member Status** drop-down to search by a specific status. Use Lists to search by multiple member statuses.

Use the **Email address** to search for records by any part of any email address. You can enter a complete address or the domain. Arena displays all records that have any email address that match the entered criteria. Keep in mind the search results page displays the preferred email address.

Use the **Phone Number** field to search for records with a partial or complete phone number. Arena accepts domestic and international phone numbers. If you enter a partial phone number, the results display all records that contain any phone number that matches the criteria you enter. For example, if you enter "901", Arena displays all records where an active phone number contains "901", (e.g., 623-**901**-0000, 623-5**90-1**423, and **901**-757-2372). Keep in mind the search results page displays the main/home phone number. If the records do not display the entered phone number in the main/home phone column then the criteria matches another number on the person's record. Consider entering area code followed by the underscore (_) wildcard in order to display all records with a specific area code.

Use the primary address field to search for records by any part of the main/home street address (e.g., 7345 Goodlett Farms Road). You can enter the numeric portion and/or any part of the street name. For example, enter "Farm" to search for records where the main/home address contains "Farm" in the street name. The search includes street names like Goodlett Farms, Blackberry Farms and Farmland. Make note of abbreviated addresses such as Trc for Trace, Ln for Lane, St for Street and CV for Cove.

Use the **Proximity** option to search for records that are a specified distance from the address you enter, based on geocoded addresses. For example, if you want a list of records that live within five miles of your organization or a group leader's home, enter "5" in the Proximity box and enter the complete address of your organization in the address boxes. The results display any record with a main/home address within five miles of the address you enter. If you want a list of people who are exactly five miles, use the column sort options on the results page.

Search for people by a **Ministry**, **Serving**, or **Event Tag**. Click the **Search** icon to search and select a Tag.

Search for people by a specific **Spiritual Gift**. Options vary by organization.

Search for people by entering the **Birth Month/Day**. Click the **Calendar** icon or enter a birthdate in **MM/DD** format.

Search for people by entering a **Birth Year** (e.g., 1980).

Search by a specific **Arena Login ID** or **Alternate ID**. A user with applicable permissions can set the Login ID and Alternate ID on the **Security** tab of the **Person Details** page. Alternate field is the Person ID on the **Security** tab. This field is static for all users with access to this page.

Add New Family

This page allows you to add new people or businesses to Arena. Prior to adding a new record, we recommend you first search the database to verify the record does not currently exist. Use Quick Search to search by name or the **White Pages/Advanced Search** page to search using additional fields.

Prior to using the page, your Arena Administrator may want to review the below customization options:

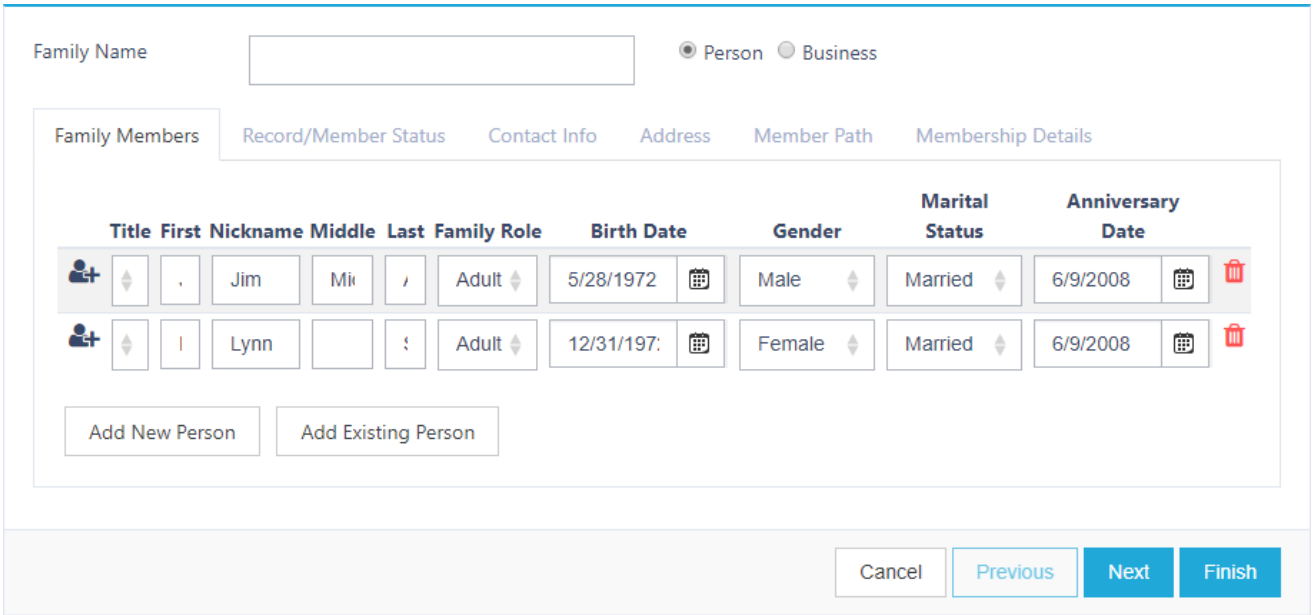
Review all associated Lookups.

Consider changing the order of applicable Lookups in either alphabetical order or by most used.

Add a New Person/Family or Business

1. From the **Membership** menu, click the **Add New Family** option.
2. Click the ***Add New Person*** link to add each family member. Click the ***Add Existing Person*** link to search and select for an existing record. The icon to the left of the person's name denotes a **new** or **existing** record. Data entry time is shorter because certain fields such, as address, propagates to all records.
3. Enter fields on the **Family Members** tab. Permission to all fields can vary by user. For users with no permission to update birthdate, the field is disabled and gender defaults to unknown. A complete date format **MMDDYYYY** is required. If the year is not available, consider using a default year such as 1900.

Users with full permission

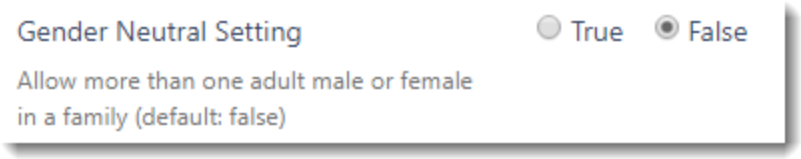


Users with limited permissions

The following fields will display as grayed out and inactive if a user does not have permission to them.

- **Title**: This field is not required but Arena uses this optional field with mail merge features.
- **First Name**: Enter the person's first name. This is a required field.
- **Nickname**: If available, enter the person's nickname. If you do not enter a nickname, Arena propagates the first name to the nickname field.
- **Middle name**: Enter the person's middle name.
- **Last name**: Enter the person's last name. This is a required field. Arena uses the last name of the first person to auto populate the Family Name field.
- **Family Role**: Select the person's family role. Arena allows one adult male and one adult female per family. Use **Relationship** to identify other adult family roles. This is a required field.
- **Birthdate**: Enter the complete birthday in **MMDDYY** or **MMDDYYYY** format or click the **Calendar** icon to select a date. If the year is not available, consider using a default year such as 1900.
- **Gender**: Enter the person's gender. This is a required field.

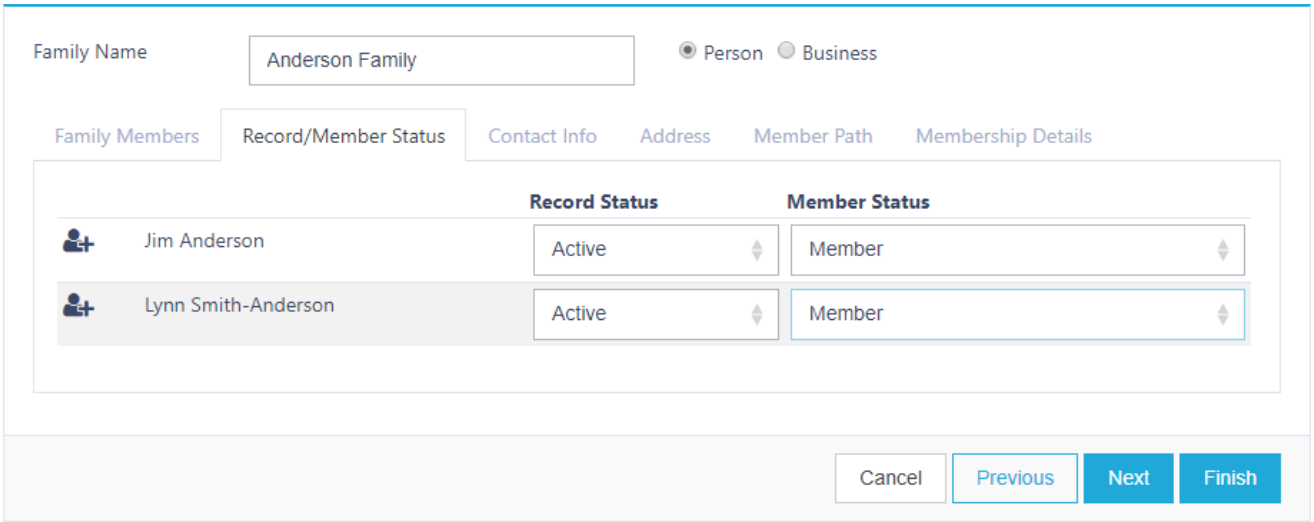
ADMIN NOTE: Click the **Module Settings** link in the upper right-hand corner (After clicking the User Initial Circle) to access the **Module Settings** window. You can set the **Gender Neutral Setting** to allow two adults of the same gender to be in the same family. The default setting is "False".



- **Marital Status**: Enter the person's marital status. This is a required field.
- **Anniversary Date**: Enter the person's wedding anniversary date. A complete date in **MMDDYYYY** format is required. If the year is not available, consider using a default year such as 1900.

4. Click the **Next** button.

5. Complete fields on the **Record/Member Status** tab.



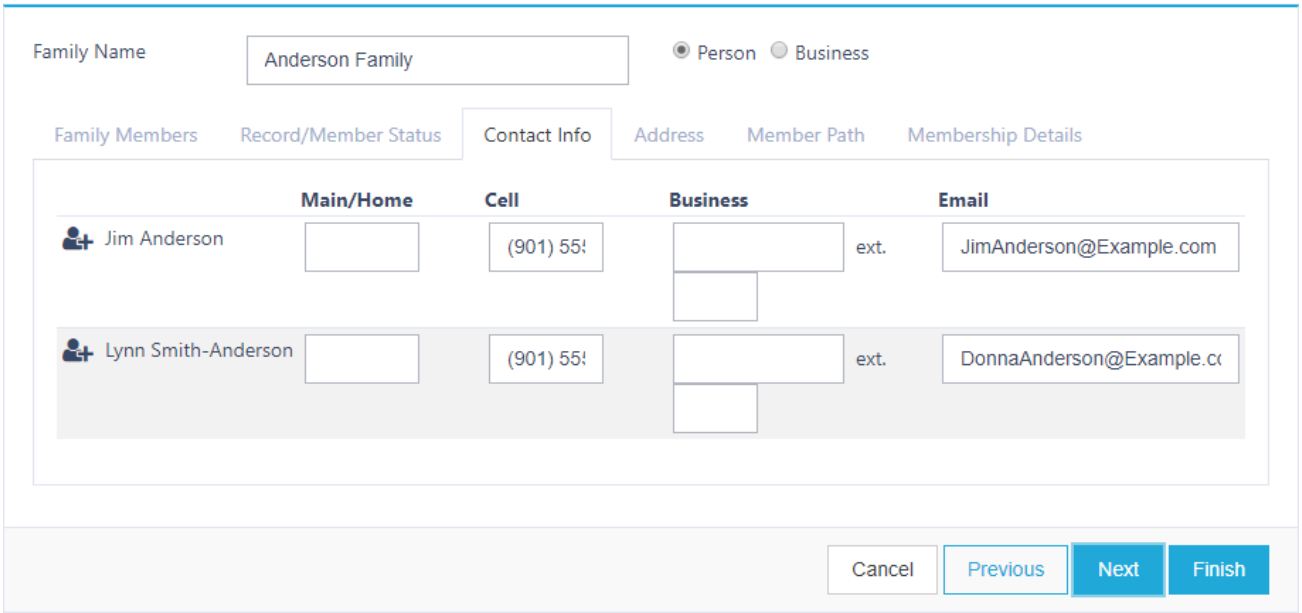
- **Record Status**: Select the person's record status. Record status denotes the person's relationship to the database. New records have the active status. This field is required.
- **Member Status**: Select the person's member status. Member status denotes the person's relationship to your organization. Options vary by organization. This field is required.
- **Inactive**: Select this option when changing a record to inactive. This field is required for inactive records.
- **Campus**: Select a campus, if applicable. (This is available only if you have campuses enabled. The **Require Campus** module setting determines if this is a required field during family creation.)
- **Assign Envelope**: Check this box to auto-assign the next sequential envelope number. If your organization does not use envelopes, this field can be set to not display.

6. Complete applicable fields on the **Contact Info** tab.

- **Main/Home**: Enter the main/home phone number for the family for the first family

member. Arena propagates this number to all family members. Enter 10-digit phone numbers without formatting (no spaces, dashes, or parentheses). You can enter international phone numbers with formatting. If the family is not using a traditional land line, consider entering the primary cell phone number in this field in addition to the cell phone number field for the individual.

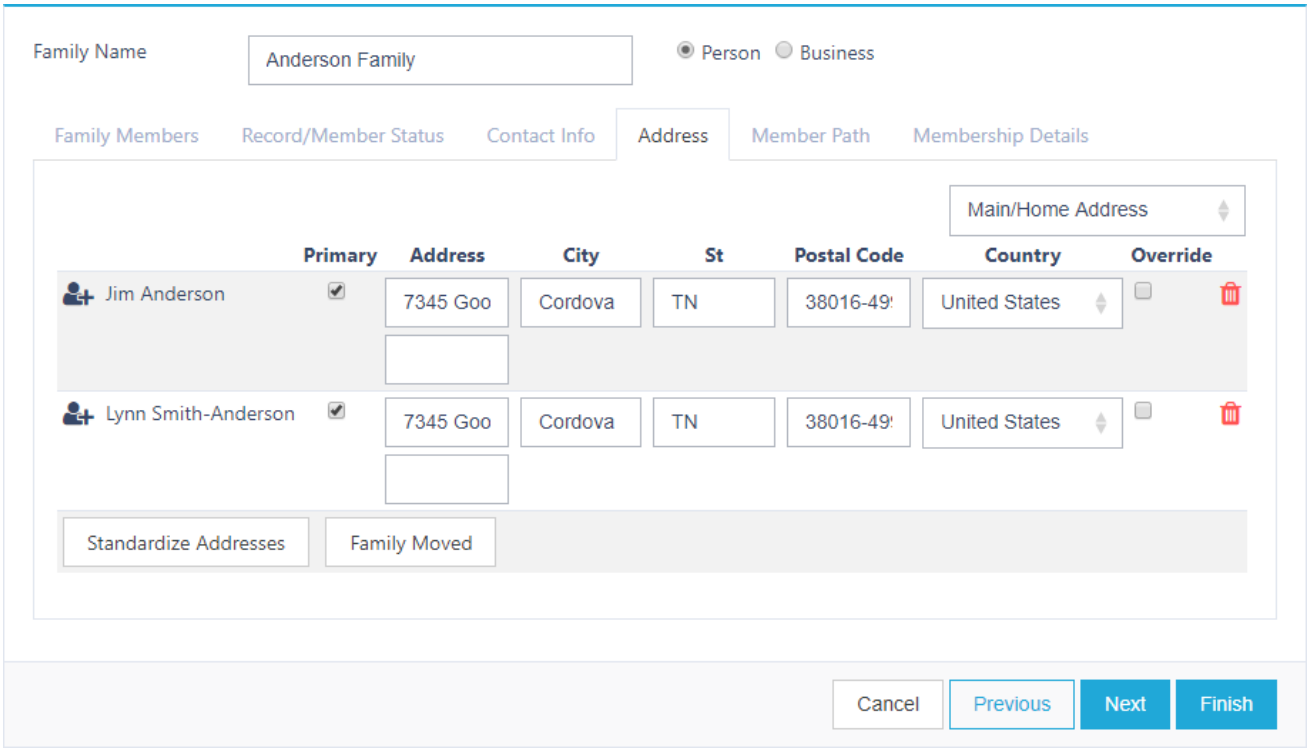
- **Business**: Enter the person's business phone numbers. Enter 10-digit phone numbers without formatting (no spaces, dashes, or parentheses). You can enter international phone numbers with formatting.
- **Ext**: Enter the business phone number extension, if applicable.
- **Cell**: Enter the person's cell phone numbers. Enter 10-digit phone numbers without formatting (no spaces, dashes, or parentheses). You can enter international phone numbers with formatting.
- **Email**: Enter the person's email addresses.



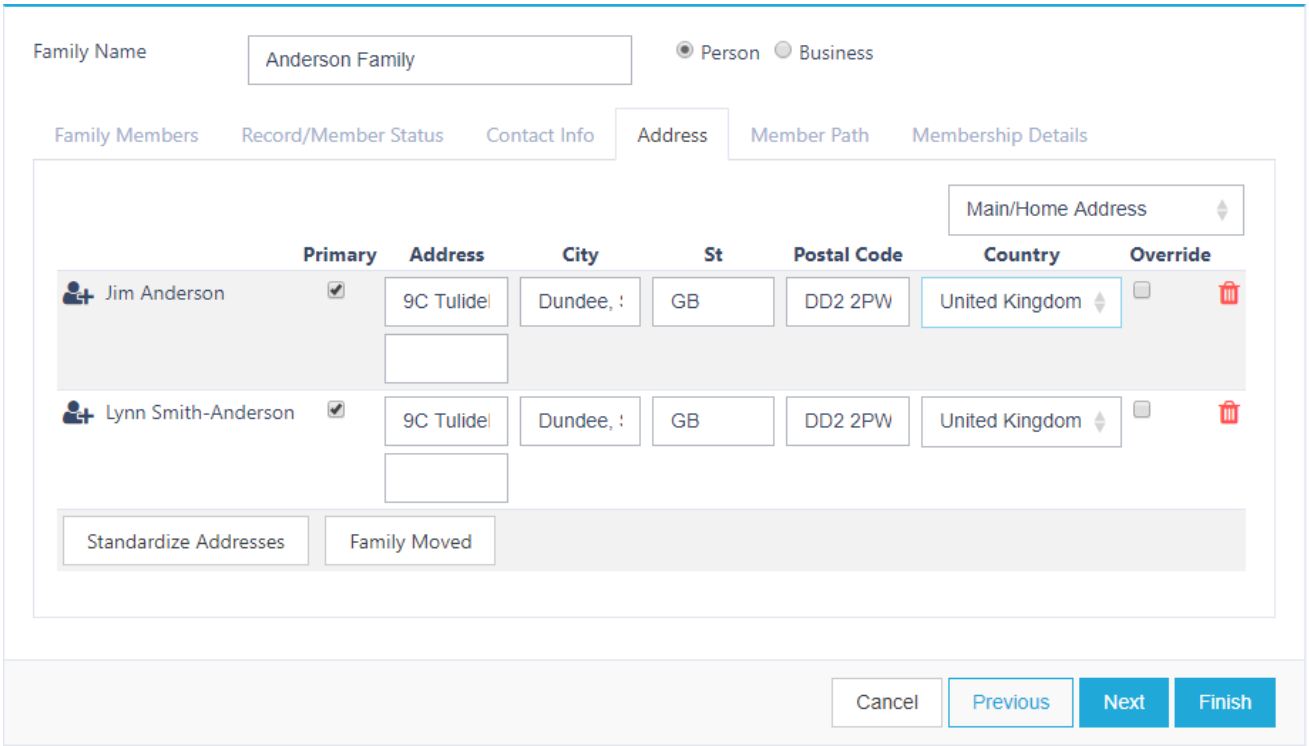
7. Click the **Next** button.

8. Enter the **Main/Home Address** for the family. The address propagates for the Main/Home, Family Alternate Address Type and previous addresses. If the zip code is unknown, enter the city and state. Click the ***Standardize Addresses*** link and Arena attempts to standardize, adding the zip+4 zip code, if available.

Address Tab with a Domestic Address

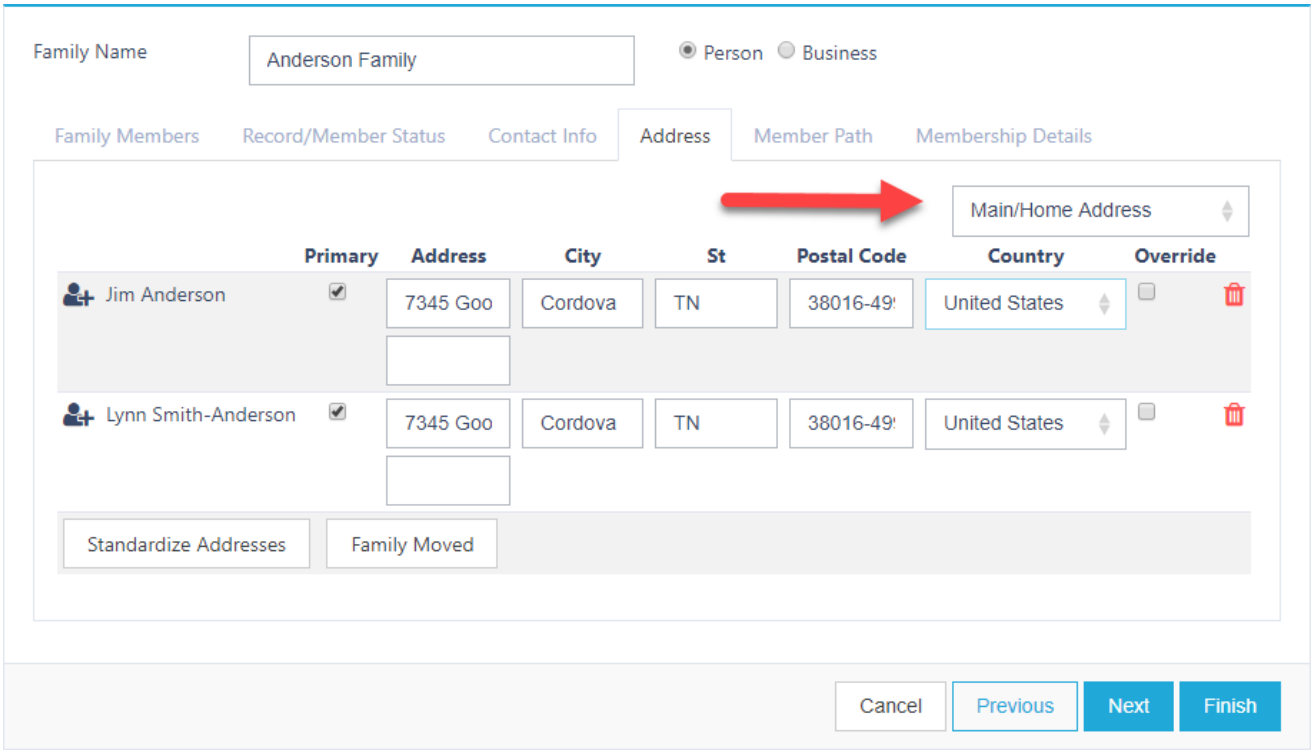


Address Tab with an International Address

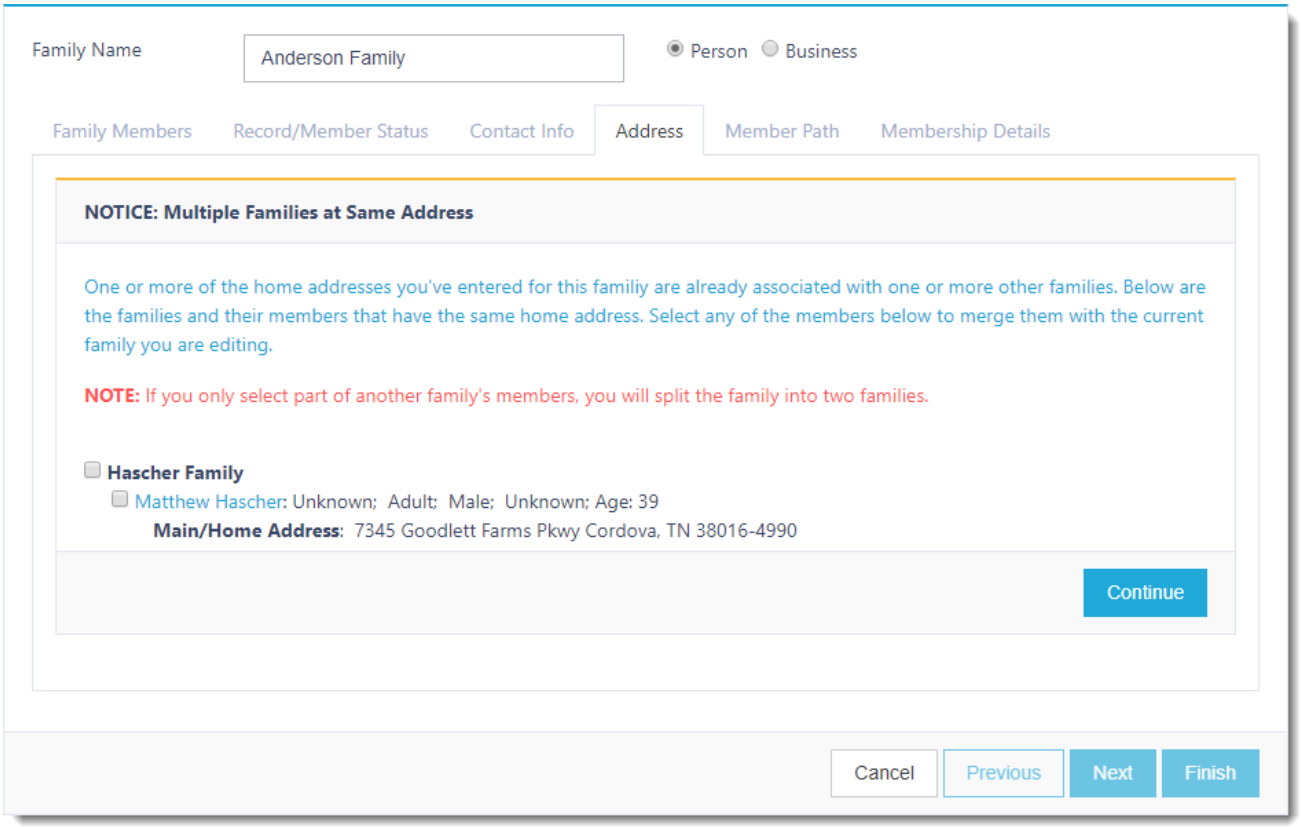


If applicable, enter an alternate address. On the same tab, you can enter alternate addresses for the family or an individual family member. Use the drop-down list in the top right corner to select an address type for the person/family or business. If you enter more than one address, you must select Primary for one address. The Primary address is used for lists, reports and mailings. Select the **Override** check box to indicate to the program "this is the correct address and there's no

need to standardize and geocode this address."

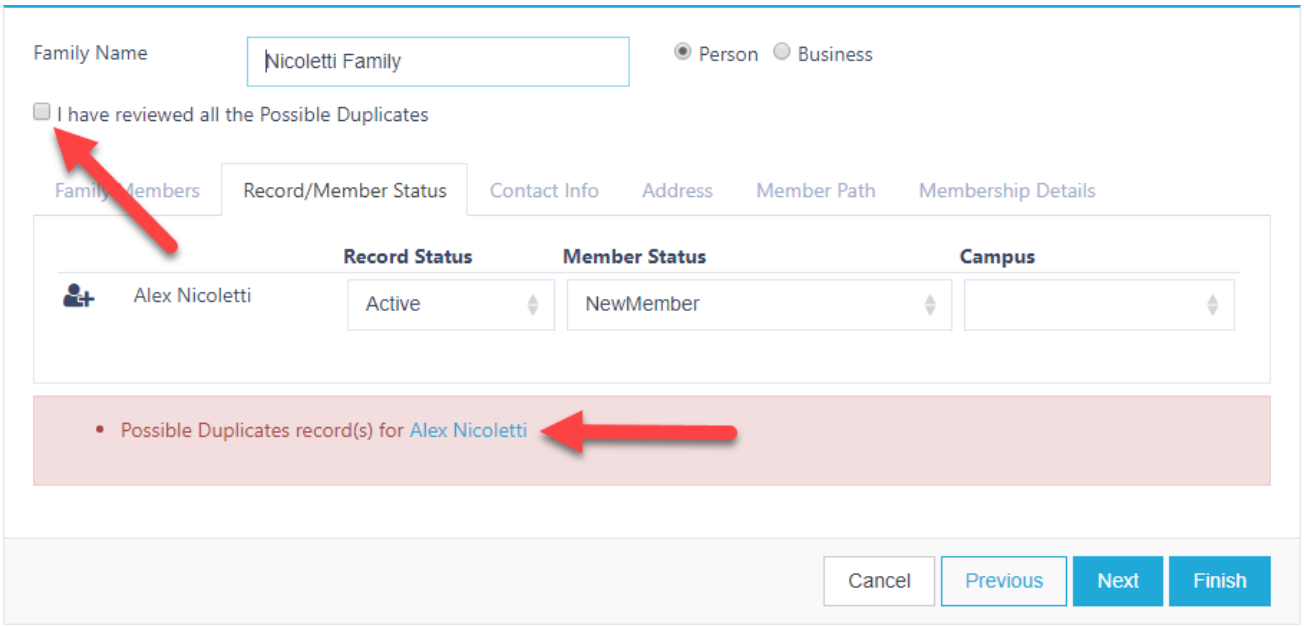


- **Primary** – Indicates the primary address for the family or individual family member.
- **Override** – Indicates no standardization or geocoding needed.
- Click the **Finish** button. If the new record address matches an existing record address, Arena displays the **Multiple Families at Same Address** page. From this page, you can combine records to one family record keeping in mind Arena supports one adult male and one adult female per family. Use Relationships to identify other adult family relationships. If the new record address does not match an existing record, the **Person Detail** page displays for the first person you entered. Arena saves the record once you click the **Finish** button.



Duplicate Records

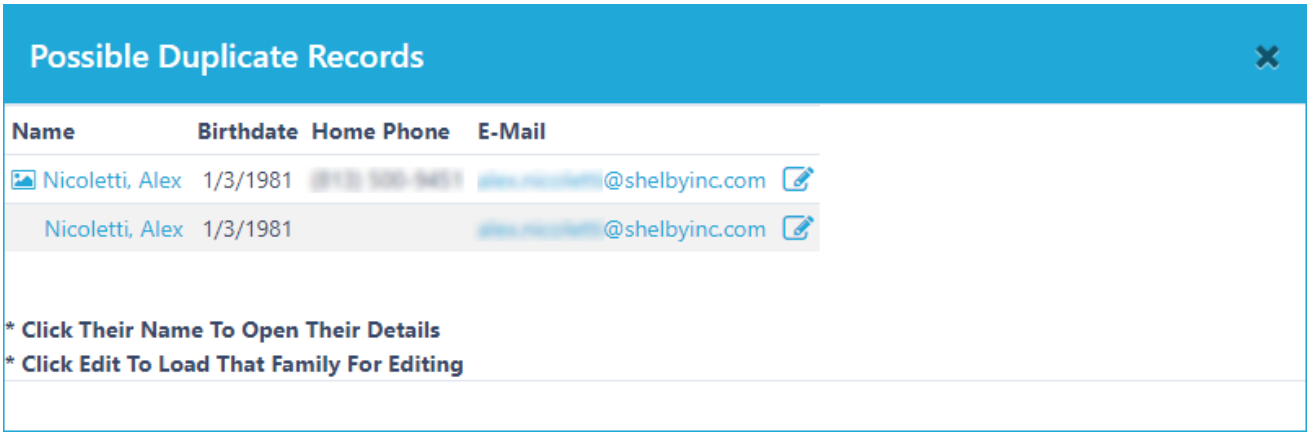
If you enter a new record and Arena detects the new record may already exist, warning text displays below the Edit Family Wizard. If duplicate records do exist, use the **Merge Members** page to merge the duplicate records. Arena does not detect duplicates on name alone but increases duplicate detection when you enter a complete birthdate or email address and the existing record has a complete birthdate or email address.



To Check for Duplicates

1. From the **Edit Family Wizard** page, click the ***Possible Duplicates Name*** link to display the two options.

2. Choose to either open the Edit Family Wizard to make changes to the existing person or view the possible duplicate record in a new browser window.



3. Click the ***Name*** link to open the **Person Detail** page in a new window so you can evaluate. Close to continue entering the new record.

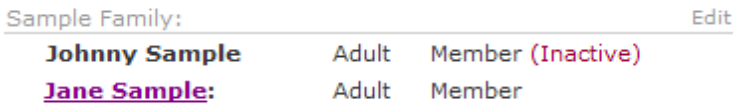
4. Click the **Edit** icon to stop entry of the new record and open the **Edit Family Wizard** page for the existing record.

If you are not entering a duplicate record, select the **I have reviewed all the Possible Duplicates** check box. Once selected, you can continue to enter the record. You must resolve all duplicate record messages prior to advancing.

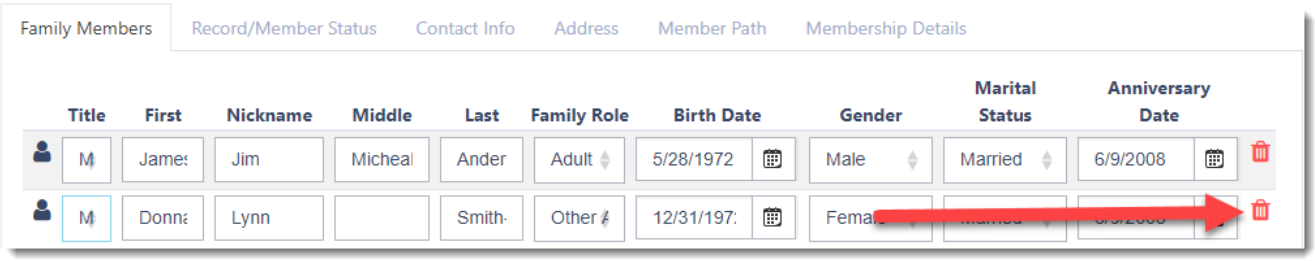
Remove Someone from a Family and Keep the Existing Record

Locate the family.

1. From the **Person Detail** page, click the ***Edit*** link on the Family section.



2. Click **Delete** icon to the right of the person's name you want to remove from the family. You remove the person's record from the family, not from Arena.



3. Click the **Finish** button.

4. Review both records for any changes such as address or phone number.

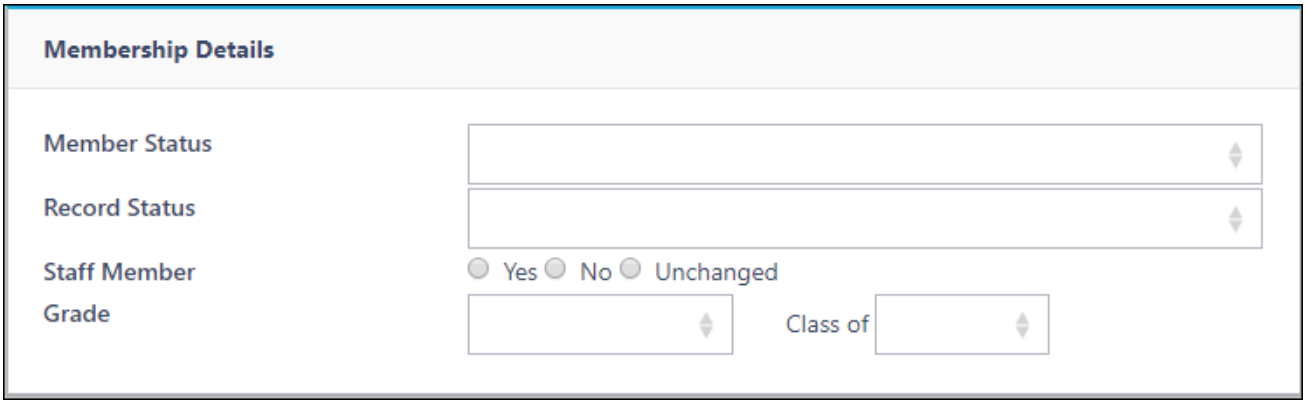
Person Bulk Update

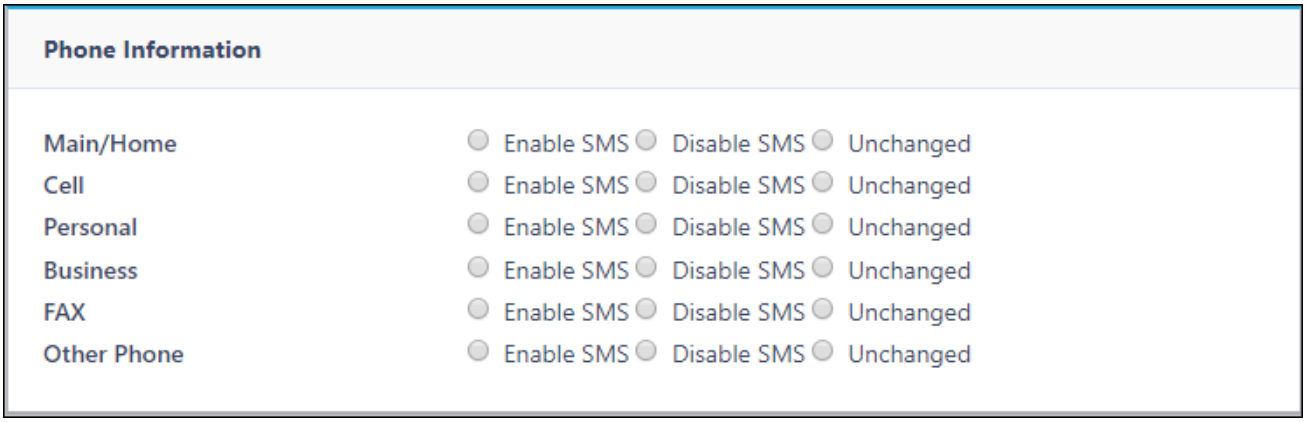
Use this option to update information for several individuals at the same time.

1. From the Membership menu, select the **Person Bulk Update** option.

2. Click **Add** and choose the individual(s) to update.

3. Specify the information on each card that you want to bulk update.





Contribution Information

Contribute Individually	Yes No Unchanged
Print Statement	Yes No Unchanged
Email Statement	Yes No Unchanged
Email PIN	Unchanged Update using last 4 of

Member Path

How Received	
Date Received	Date Received
New Members Class Completed	New Members (
Date2	Date2
Date3	Date3
Date4	Date4
Date5	Date5
Date6	Date6
Date7	Date7
Date8	Date8
Date9	Date9
Date10	Date10
Member Of	
Source	
Special Profile	

Check-In

Allergies	Allergies
Medical Situation	Medical Situation
Potty Training	Potty Training
Custody Situation	Custody Situation
Special Note	Special Note

Member Security

Privacy Policy	Privacy Policy

Education

School	

Employment

Employer	Employer
Department	
Position	Position

Sports

Uniform Size	
Birth Certificate	☐
Code of Conduct	☐

Volunteer Information

Name Tag Issued	Name Tag Issue
Volunteer Application	Volunteer Applic
Background Check	Background Che
Food Handler Card	Food Handler C

Visit Dates

First Visit	First Visit
Second Visit	Second Visit
Third Visit	Third Visit

Membership Details

Date Joined	Date Joined
Baptism Date	Baptism Date

Ministry Tags

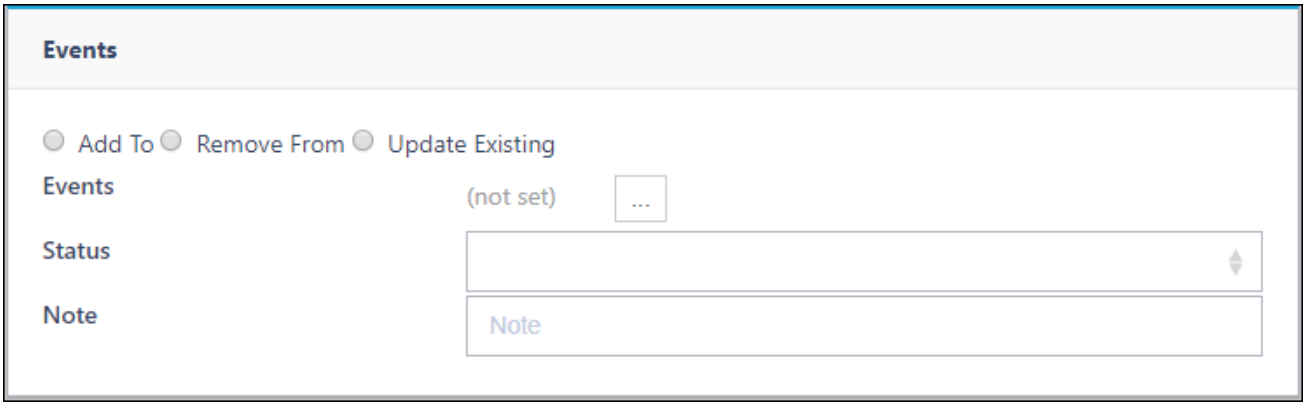
Add To Remove From Update Existing

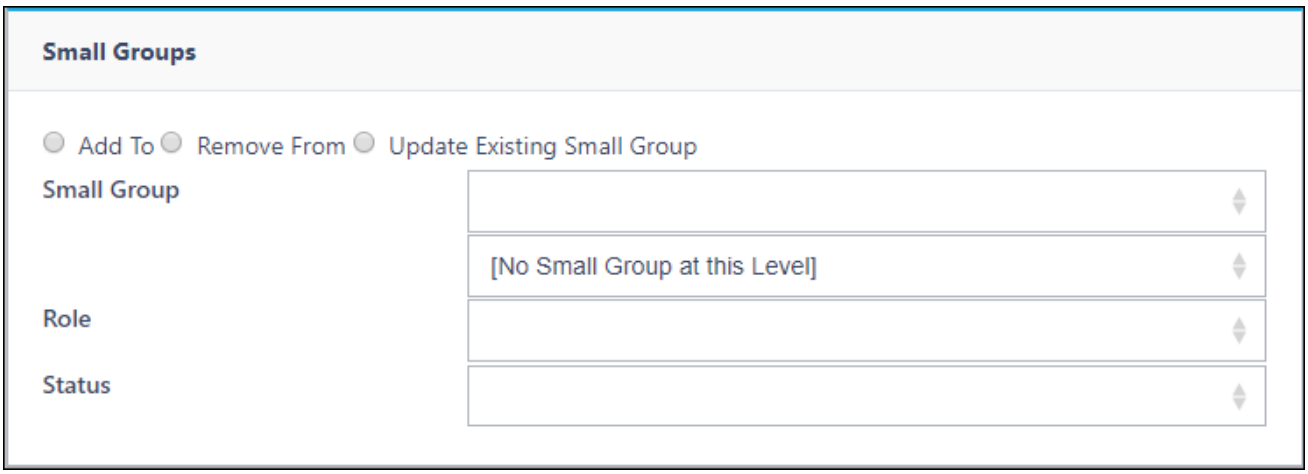
Ministry Tag	(not set) ...
Status	
Note	Note
Pending	Pending
In Review	In Review
Active	Active
Dormant	Dormant
Activity	
Activity Note	Activity Note

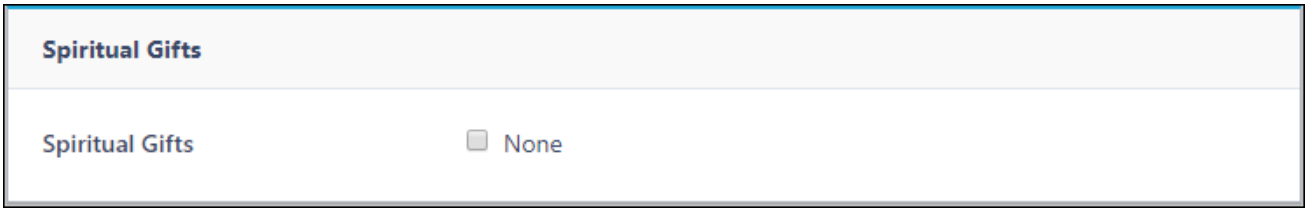
Serving Tags

Add To Remove From Update Existing

Serving Tag	(not set) ...
Status	
	(*)-Requires a reason
Note	Note
Reason	Reason
	If placing elsewhere, be sure to include the name of the new ministry.
Hours/Week	Hours/Week
Prerequisites Met	☐
Pending	Pending
In Review	In Review
Active	Active
Dormant	Dormant
Activity	
Activity Note	Activity Note





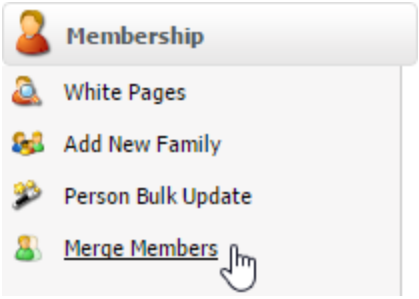


4. Click **Update**.

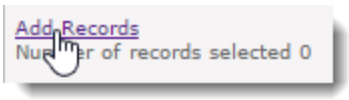
Merge Members

The Merge Members page allows you to merge two or more records including their associated data and relationships into one new record. Follow the steps below to merge records.

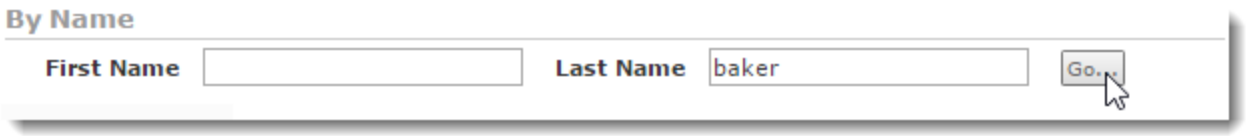
1. From the Membership menu, select the **Merge Members** option.



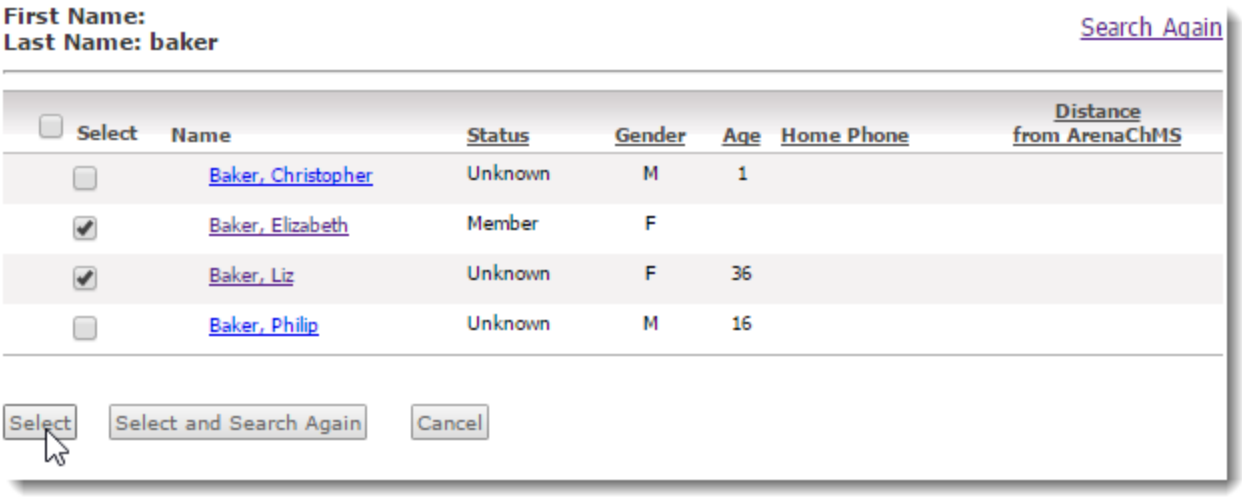
2. Click the ***Add Records*** link.



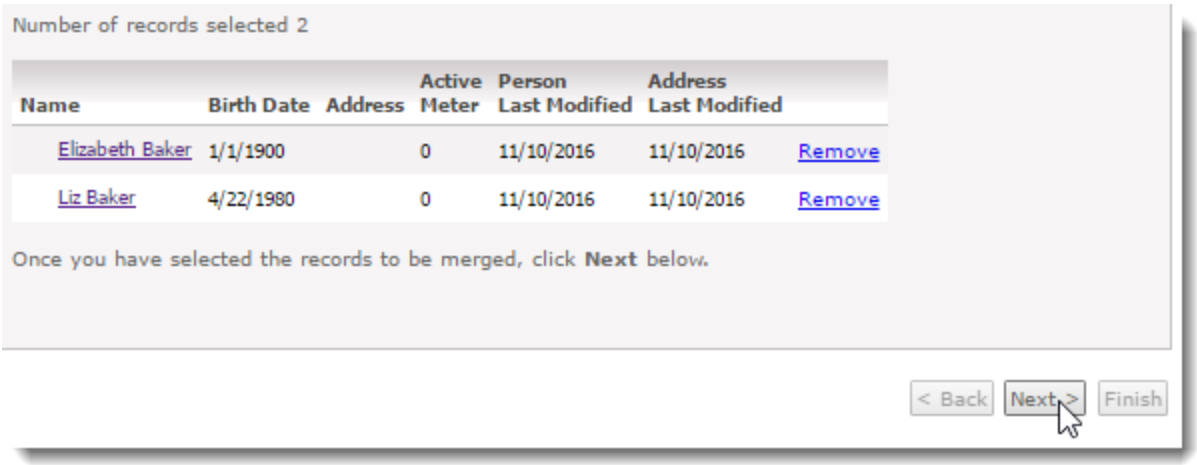
3. Enter search criteria such as the **Last Name** and then click the **Go...** button.



4. Check the names that you would like to combine and then click the **Select** button.

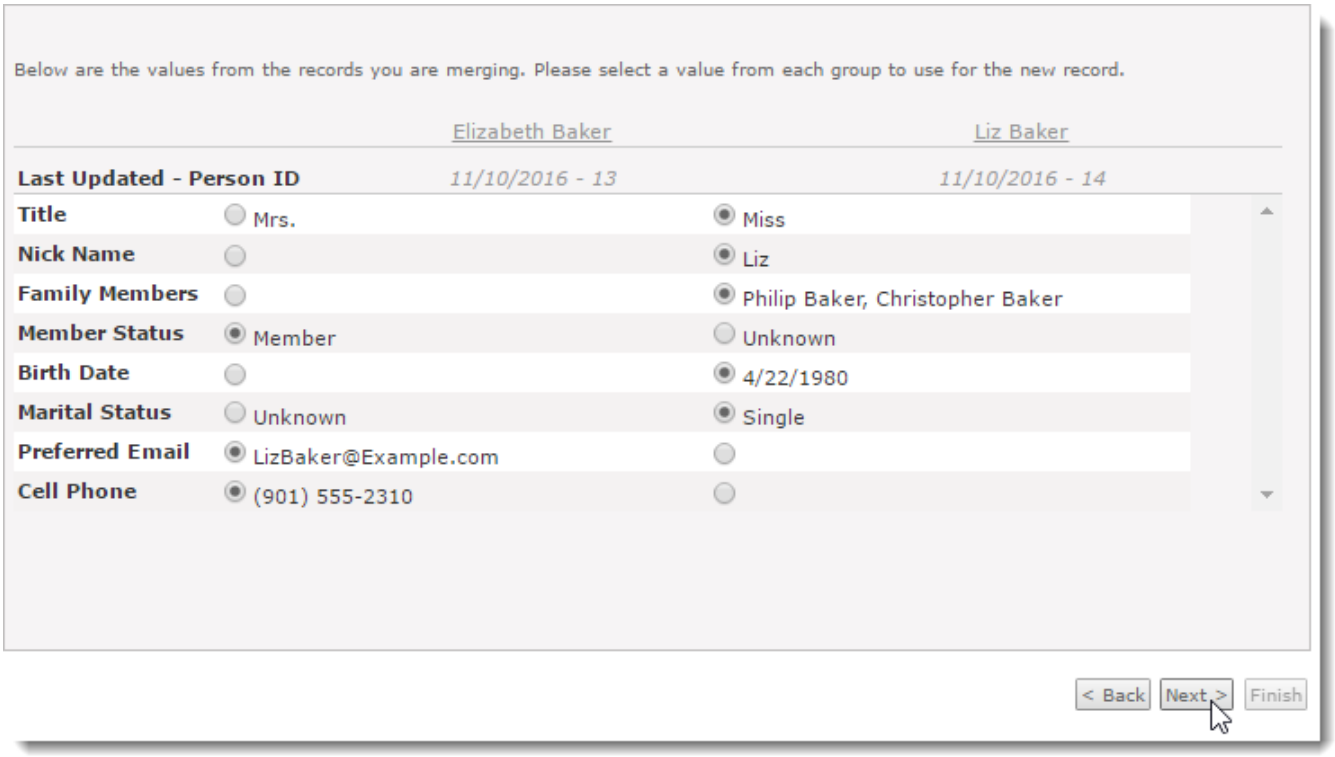


5. The records selected appear on the Merge Duplicate Members page. Click the ***Remove*** link if you have selected an incorrect record. Otherwise, click the **Next** button to continue.



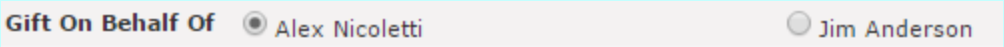
6. A comparison listing appears and displays the values for each individual. Select the values to retain and then click the **Next** button.

NOTE: The names to merge are listed as column headers. Click on a column header to view that record in another tab on your browser.

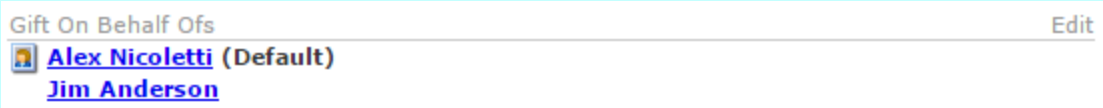


Merging SubDonor Information

When merging two records that both contain SubDonors, there is an option to select the default SubDonor. It is labeled as **Gift On Behalf Of**.

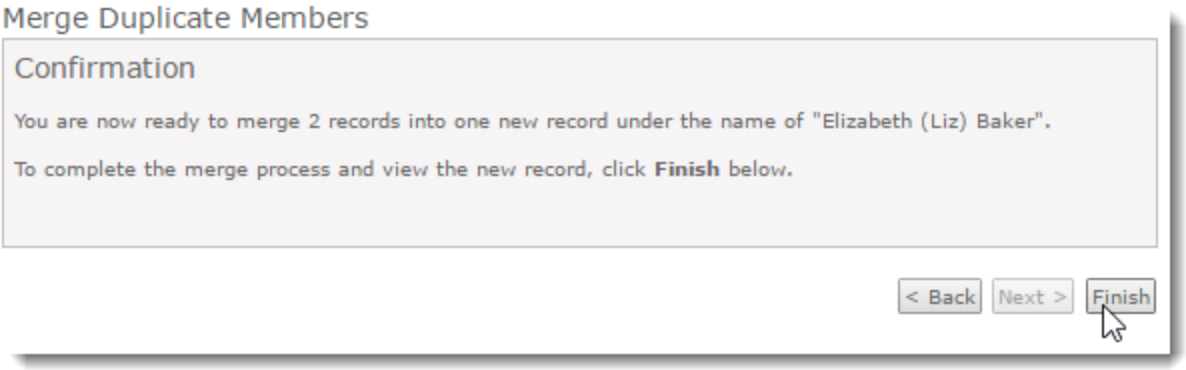


After the members are merged, both SubDonors are listed on the Person Detail page for the combined member. The one that was selected on the "Gift On Behalf Of" option is notated as the **Default** SubDonor.

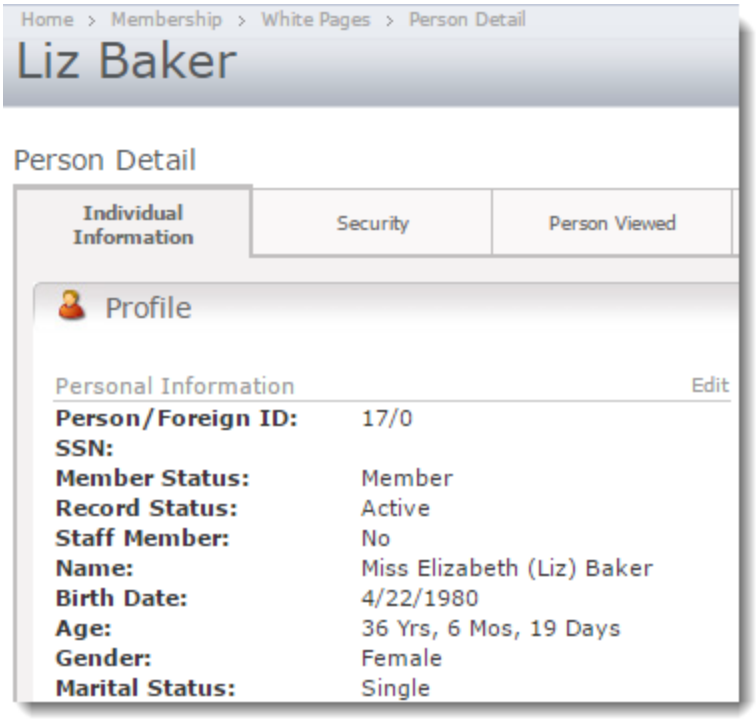


The **Gift On Behalf Of** label can be changed to "Default SubDonor" or whatever description best fits your organization. To change the label name, select the **Organization** option under the **Administration** menu. Click on the ***ContributionSubDonorTitle*** link and then change the **Value** field. Click the **Update** button when you are finished. (Don't forget to Refresh Cache.)

7. The Confirmation message appears. Review the message. Click the **Back** button to review or make changes to your selections or click the **Finish** button to merge the records.



8. When the records have finished merging, the new "merged" record displays for your review.



Me (Person Detail Page)

The Person Detail page displays information for an individual and is divided into several tabs. Depending on what security settings have been set by your administrator, you may or may not have all of the tabs listed below.

Individual Information Tab

Security Tab

Person Viewed Tab

Contributions Tab

Prayer Requests Tab

Volunteer History Tab

Counseling Tab

Individual Information Tab

This section displays demographic and individual information for member/business records. The fields reviewed in this section are default fields. Arena has the option to add custom fields such date fields, check boxes, URLs, text boxes and the ability to upload documents. Access to sections and fields can vary by user. A field that is populated displays. Click the ***Edit*** link to display all available fields in a section.

Profile Section

The Profile Section of the **Individual Information** tab contains Personal Information, Family information, Relationships, Peer Network information, Contributions, Photo, Check-In, Counseling, Phones, Email addresses, Person Attributes, and Address information.

Personal Information

The Personal Information section displays the following fields of information.

- Each record has a **Person ID** and converted records have **Foreign ID**. The Foreign ID is the Shelby v.5 alternate ID.
- The **SSN** filed displays the person's social security number. After entering and updating the section, Arena displays the last 4-digits.
- Every record has **Member Status** that represents the relationship to your organization.
- Every record has a **Record Status** that represents the relationship to the database.
- If your organization is multi-campus, you can identify the **Campus** for the record.
- Use the **Staff Member** to identify staff of your organization.
- The **Name** field displays the person's title, first, middle, nick, last names and suffix.
- The **Previous Last Name** field displays the person's previous last name.
- The **Age** field displays the person's complete birth date and age. A complete **MMDDYYYY** date format is required for the age to display. If the year is not available, consider using a default year such as 1900.
- The **Gender** field displays the person's gender. Options are male, female and unknown.
- The **Marital Status** field displays the person's marital status. Options may vary by organization.
- The **Anniversary Date** field displays the person's wedding anniversary date. A complete **MMDDYYYY** date format is required. If the year is not available, consider using a default year such as 1900. Add the same date to both spouses.
- This **Grade** field displays the grade and graduation year. Update this field annually using the Grade Promotion Organization Setting.
- The **Medical Info** field is a text box to capture medical information.
- The **Date Added** field displays the date the record was added to in Arena.
- The **Date Modified** field displays the date the record was last updated.
- The **Date Last Verified** field displays the last verification date of the record. This is an

effective option to verify all contact information as users access the records. Once information is verified, click the ***Verify*** link to add the current date.

Example of a Child Record

Profile Information

Personal Information

Person/Foreign ID	1723/0
SSN	
Member Status	Child of A Member
Record Status	Active
Staff Member	No
Name	Miss Laura Elizabeth Anderson
Birth Date	7/4/1999
Age	18 Yrs, 1 Mos, 17 Days
Gender	Female
Marital Status	Single
Anniversary Date	
Grade	
Medical Info	
Date Added	8/21/2017
Date Modified	8/21/2017
Date Last Verified	8/21/2017 Verify

Example of an Adult Record

Profile Information

Personal Information

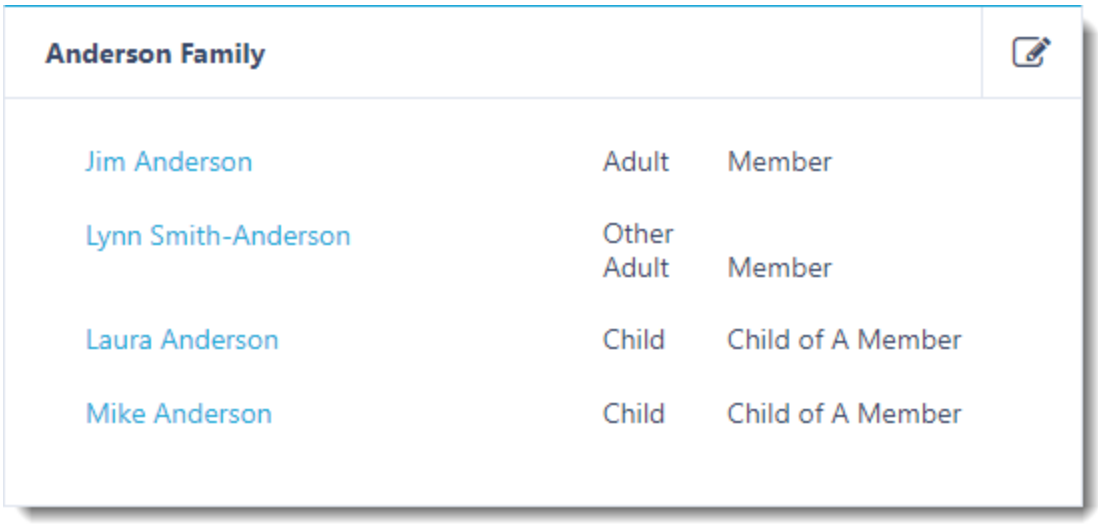
Person/Foreign ID	1721/0
SSN	
Member Status	Member
Record Status	Active
Staff Member	No
Name	Mr. James (Jim) Micheal Anderson
Birth Date	5/28/1972
Age	45 Yrs, 2 Mos, 24 Days
Gender	Male
Marital Status	Married
Anniversary Date	6/9/2008 (9 Years)
Grade	
Medical Info	
Date Added	8/21/2017
Date Modified	8/21/2017
Date Last Verified	8/21/2017 Verify

Family Information

This section lists the person's spouse and/or children, their family role and membership status. Family members are listed by family role and then by age. The head-of-household function orders by Family Role and then by gender. The oldest adult male is considered the head-of-household. If no adult male exists in the family, the oldest adult female is considered the head-of-household. Arena allows one adult male and one adult female per family. Use Relationships to identify

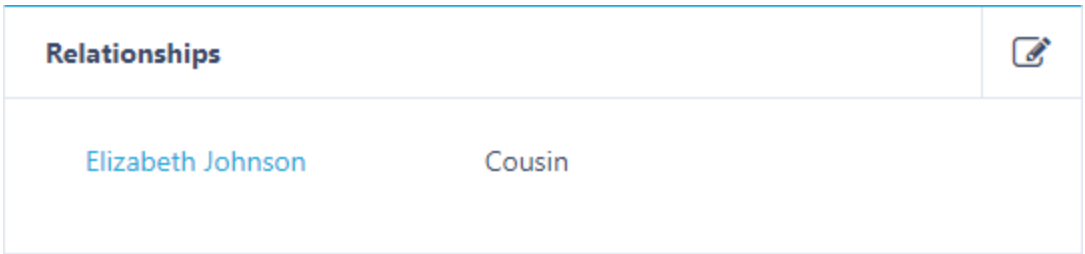
extended family members.

NOTE: There is a "Gender Neutral Setting" in the Module Settings of the Edit Family Wizard page. Selecting "True" on this setting allows you to add more than one adult of the same gender to a family.



Relationships

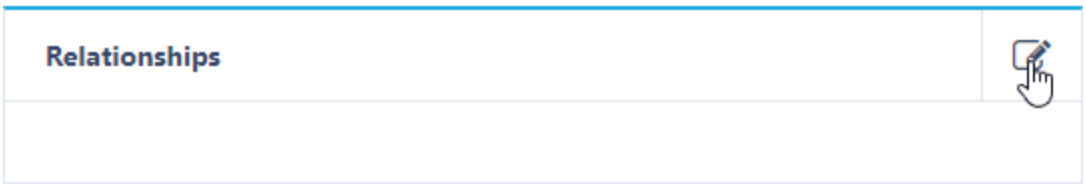
Use Relationships to identify relationships outside of the immediate family such as grandparents, aunts, uncles, etc. If your organization uses Arena Check-In, any **Relationship Type** containing the phrase "can checkin" (case insensitive, no quotes) permits this action. If no Relationship Types exist, they can be added under Administration -> Relationship Types. (When relationships are changed or added, the changes display under the History tab on members Person Detail page.)



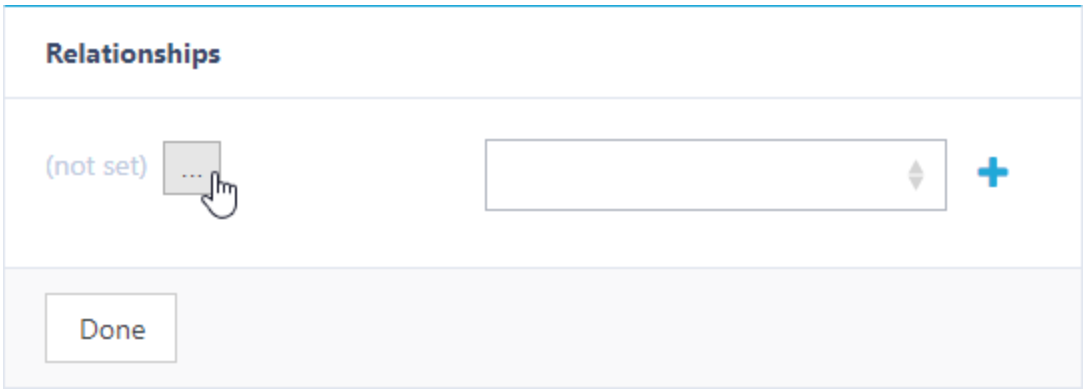
Apply a Relationship to a Record

Before you begin, be sure to consider the record currently displayed. After selecting a record, you select the Relationship the person is to the record currently displayed.

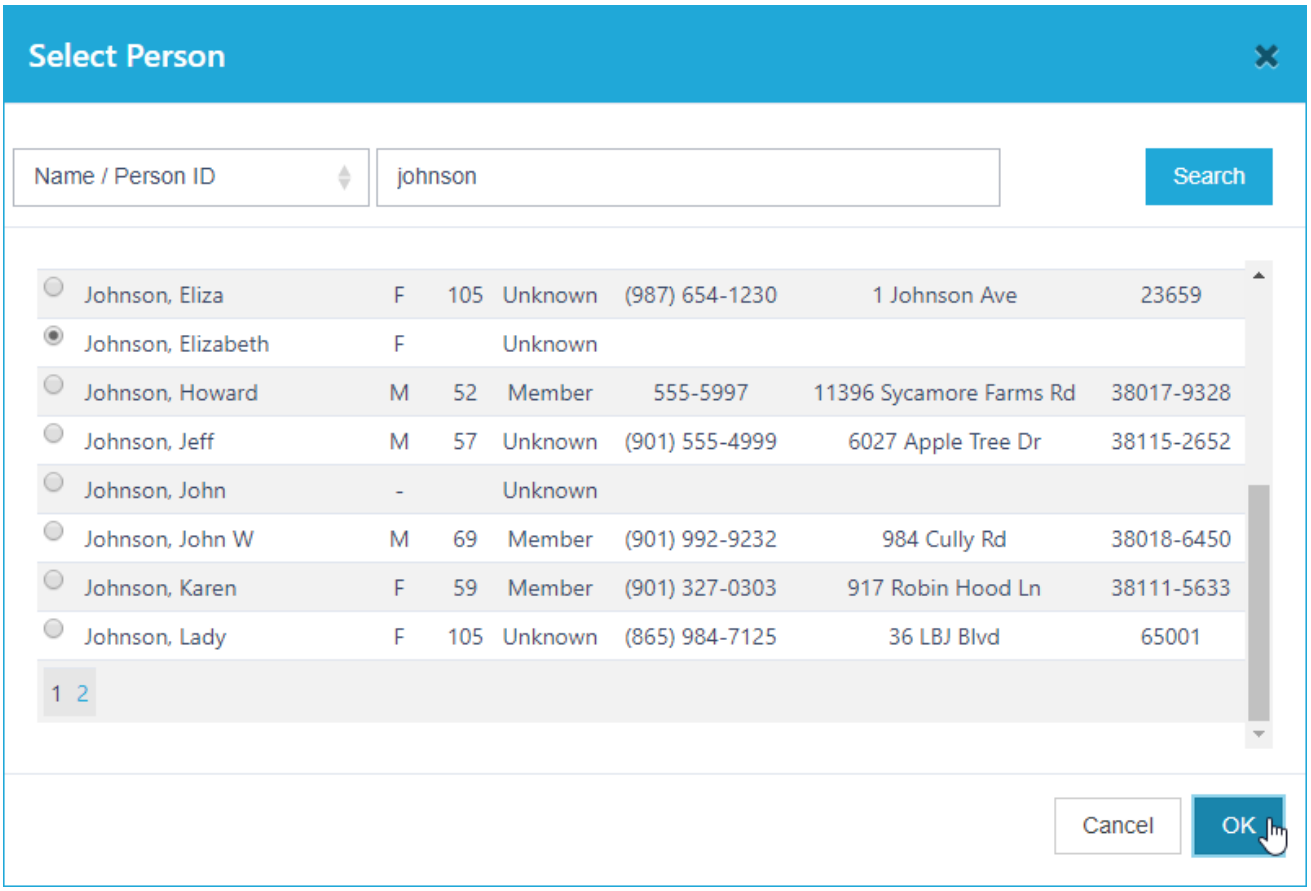
1. Click the ***Edit*** link for this section.



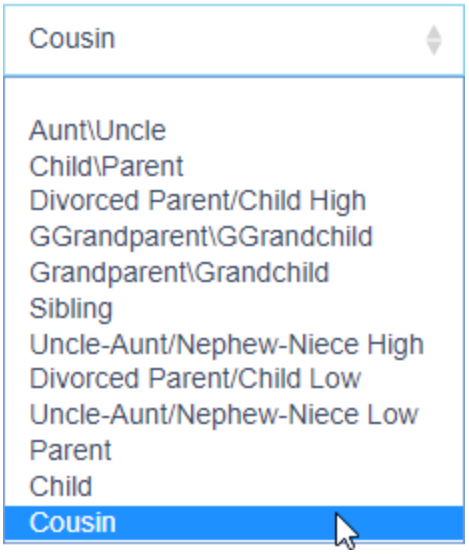
2. Click the ***Select Person*** link to display the quick search pop-up window.



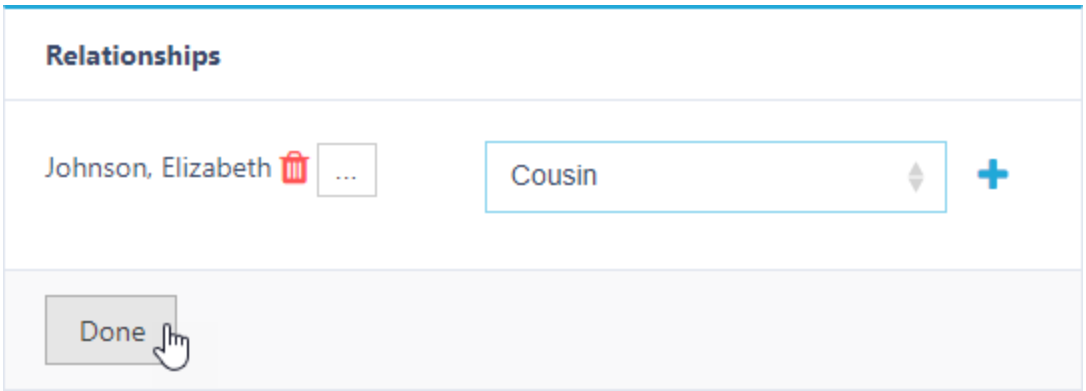
3. Search for an existing record. Click the **Name** radio button then click the **Select** button.



4. Select a **Relationship** from the drop-down list. Available Relationships vary by organization.



5. Click the ***Done*** link. The inverse of this relationship automatically displays on the other person's record. Be mindful of relationships types that are the same such as sibling.



Peer Network

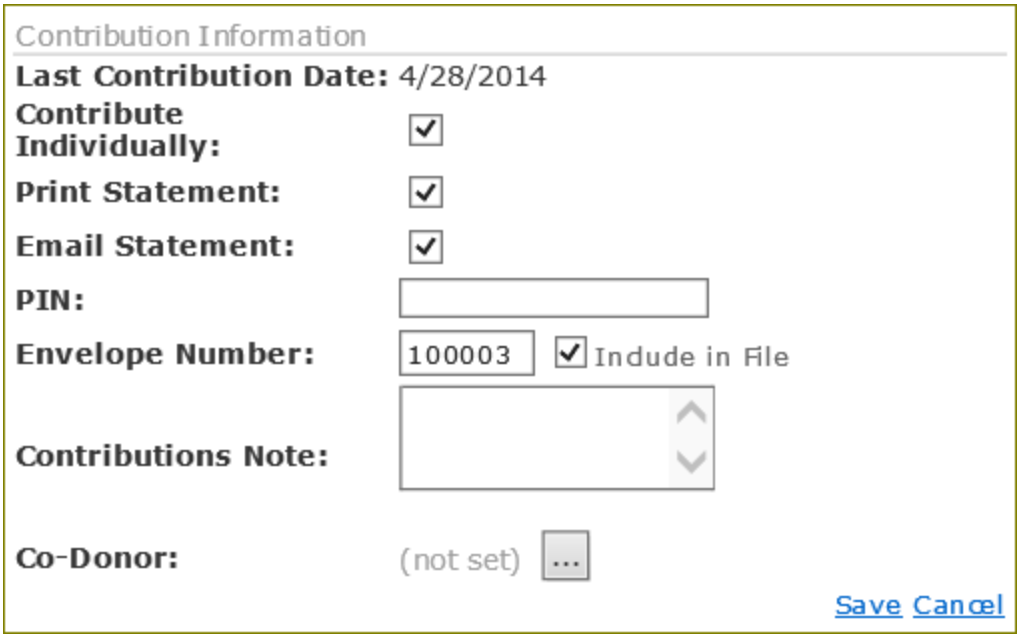
The Peer Network module exposes relationships between people that would otherwise be somewhat hidden in the depths of the Arena database. Peer Network scoring is calculated based on the Relationship scale setting in Groups and Tags to which the people belong. The arrows represent most recent connection trends. A **Trend Up** icon or **Trend Down** icon represents the most recent connection trends the person has with records. Click the ***View Details*** link to view all connections.

Contribution Information

This section contains default and custom fields used for Contributions. Use this area to denote if sending contribution statements via email or snail mail. Contribute Individually, Print Statement and/or Email Statement must be the same for couples wanting a joint statement. In the case of printed statements, both records should have an active primary address and in the case of more than one active address, at least one must be marked Primary. In the case of email statements, the head of household should have an active email address on their record.

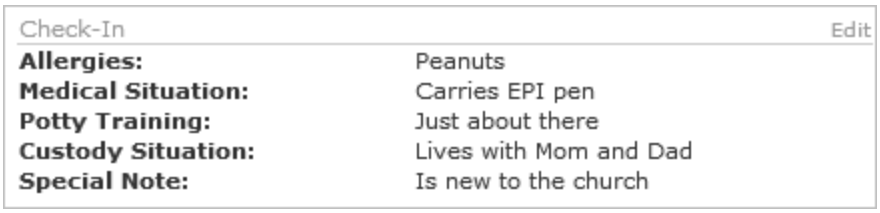
- **Last Contribution Date**: This date is the most recent contribution the person made.
- **Contribute Individually**: Check this box to indicate if the person contributes individually. Leave blank if contributing with a spouse so that contributions display on both adult records.
- **Print Statement**: Check this box to indicate the person wants a printed contribution statement. You can select both Print and Email Statement options, which result in including record in both printed and emailed statements.
- **Email Statement**: Select this check box to indicate the person wants to receive contribution statements via email. This can only be selected if the record has an email. PIN number is required. You can select both Print and Email Statement. Using this option, Email Statement should be selected on all family members where Contribute Individually is not checked.
- **PIN**: Use this field to enter the PIN number (up to 10 characters) in order for a contributor to receive an email contribution statement. Statements are emailed as secured PDF documents. A PIN number is required in order for the contributor to open a contribution statement sent via email. To enable the PIN number field, check the "Email Statement" box.
- **Envelope Number**: Select the **Assign** check box to assign the next sequential envelope number automatically. You can also manually enter the envelope number. Click the **Include in File** check box to include or exclude the number with an export file for your envelope vendor.
- **Contribution Note**: Use this field to enter contribution notes. These notes display when contributions are being entered manually.

- **Sub-Donor**: Use this field to associate this record with another record. When posting contributions, this person's name displays with the contributor. The "sub-donor" (or the customized field name for your organization i.e. "Co-Donor" on screen shot on previous page) is a way to associate a gift with another record without actually giving them tax-deductible credit for the gift.



Check-In

This section contains default fields used to record special information that pertains to Check-In. Using Arena's default Child Tag, an alpha value prints for any fields that contains data- CAMPS. **C** for Custody Situation, **A** for Allergies, **M** for Medical Situation, **P** for Potty Training and **S** for Special Note. Consult with your Arena Administrator to customize this section.

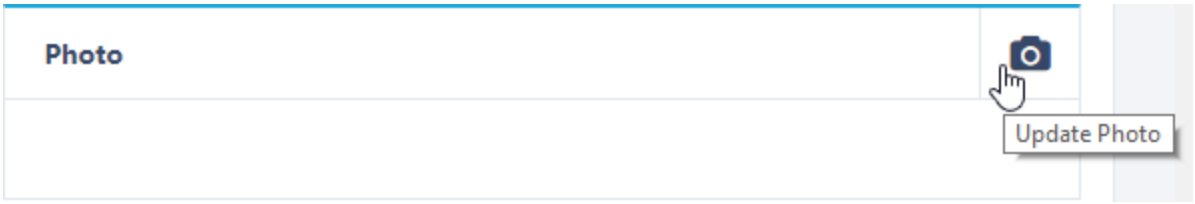


Photo

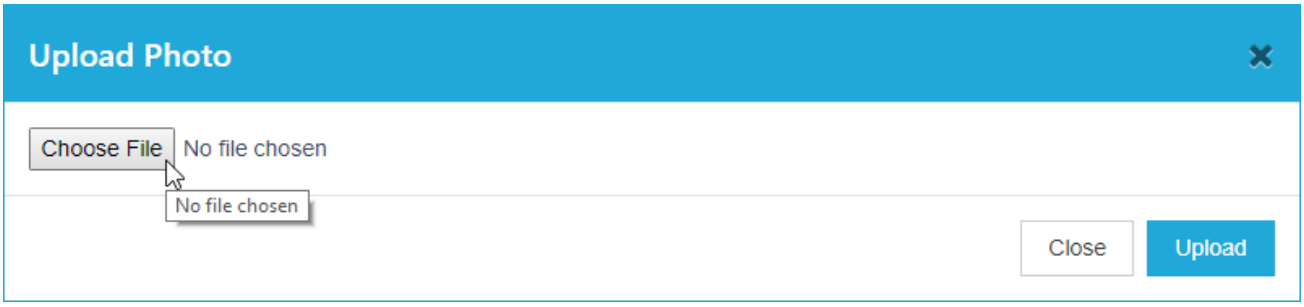
Use this section to upload and view a single photo for the individual. The photo sizes must be at least 200 x 200 pixels for the pictures to display properly.

Add a Photo

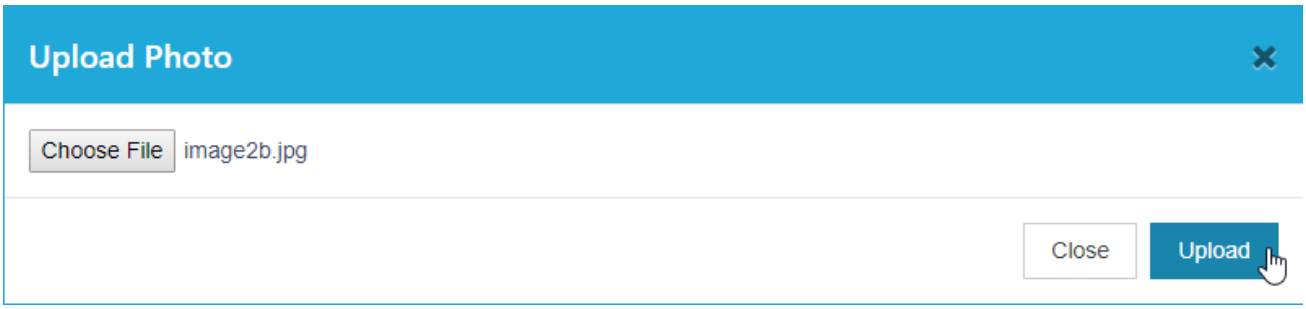
1. Click the ***Update Photo*** link.



2. Click the **Choose File** button.



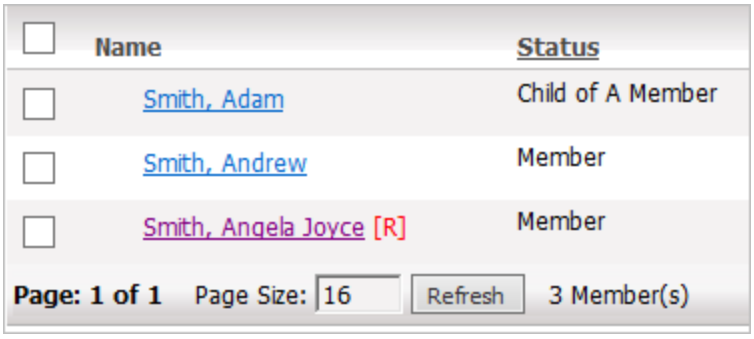
3. Find the photo and click the **Upload** button to save.

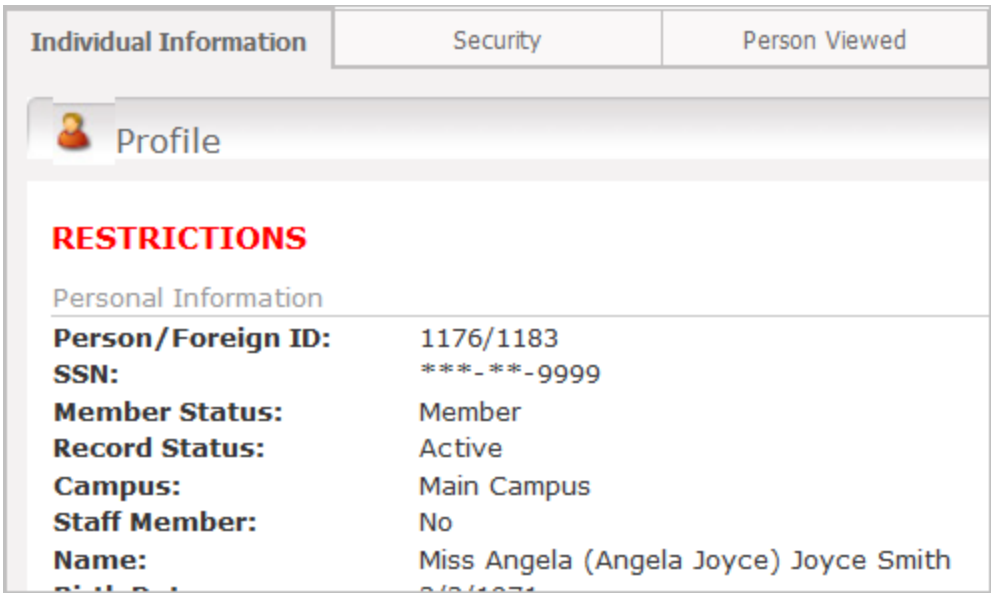


Counseling

This customizable section displays restrictions set on the **Counseling** tab. (See your Arena Administrator regarding the customizable options.)

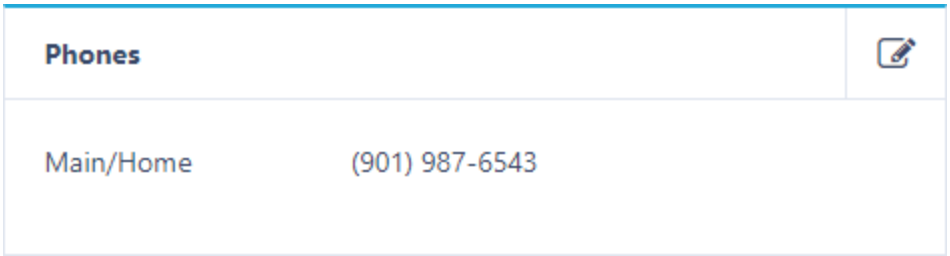
You can identify specific records with specific Counseling Restrictions so that the record always displays with [R]. (See your Arena Administrator for additional information.)





Phones

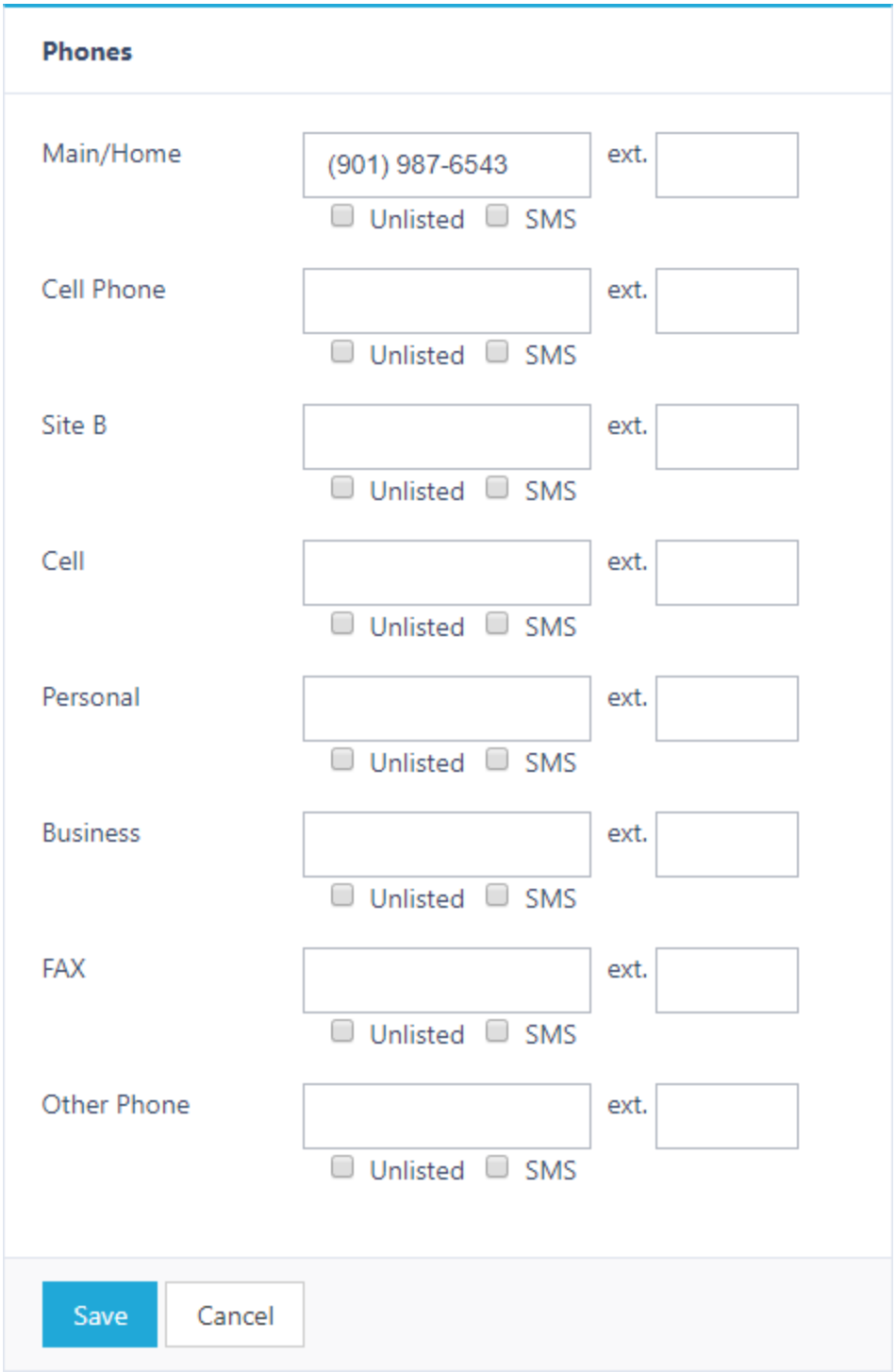
This area displays phone number for the individual or company.



Update or Add a Phone Number

1. Click the ***Edit*** link for this section.

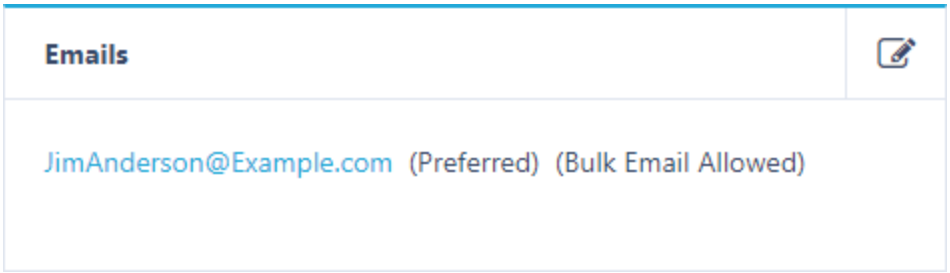
2. Enter the phone number in the first field, an extension number in the second field (if applicable), indicate if **Unlisted** or is **SMS** capable. No formatting is necessary when entering 10-digit phone numbers. They automatically format when you press the "Tab" key. International phone numbers do not format. If you select SMS, you must select a provider from the drop-down. Only users with view permission can view the unlisted phone number(s).



3. Click the **Save** button. The **Send Text Message** icon indicates you can send an SMS (Short Message Service). If you click the Send Text Message icon, a new communication page opens.

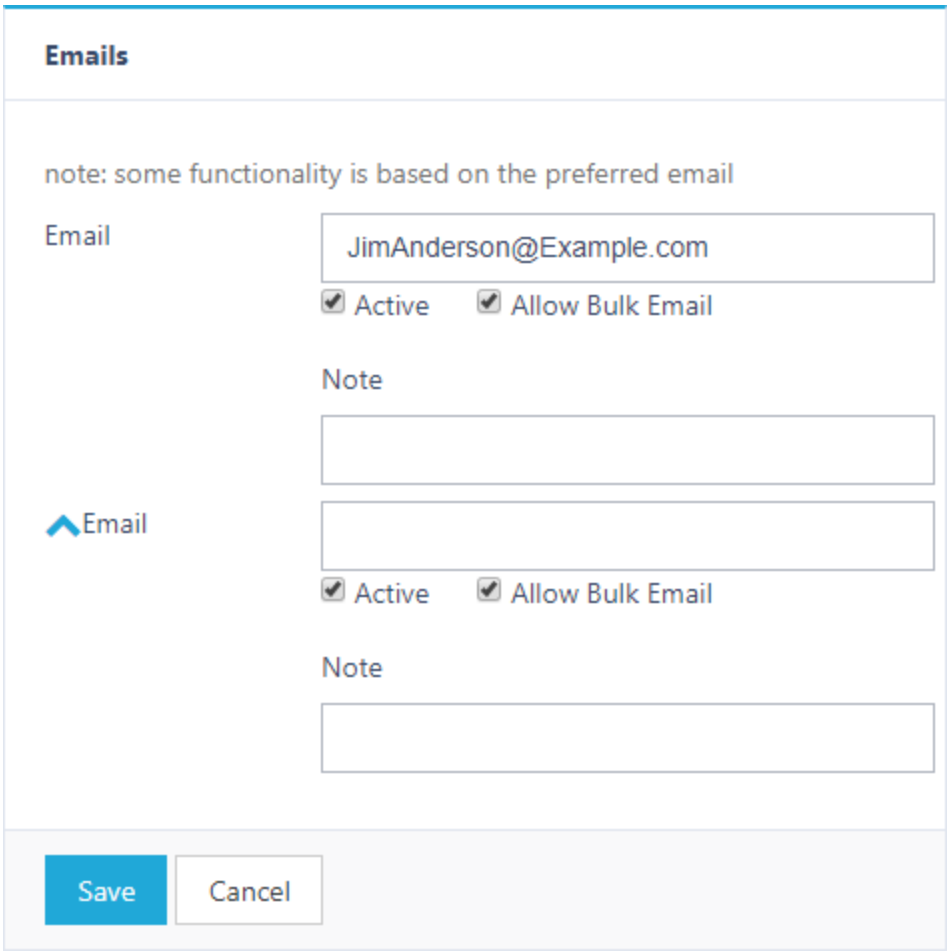
Email Addresses

This area displays email addresses for the individual or company. The email address at the top of this section is the preferred email address. Emails sent using Arena Communications include all active email addresses.



Add or Edit Email Addresses

1. Click the ***Edit*** link for this section.



2. Enter the email address.

3. Enter **Notes** such as indicating work, personal, etc.

4. Select **Active** to indicate the email address should be used. New Communications are sent to all active email addresses.

5. Select **Allow Bulk Email** to indicate if this email address should receive bulk email communications. This field works in conjunction with the "Check here if this is a bulk email message" on the **New Communication** page. When sending emails where this is checked, a

link is added to the email allowing recipients to opt out of receiving future bulk emails. Arena un-selects this box for that email address.

6. Click the **Preferred Email** icon to move any email to the preferred position. The address in the first position is the preferred email address.

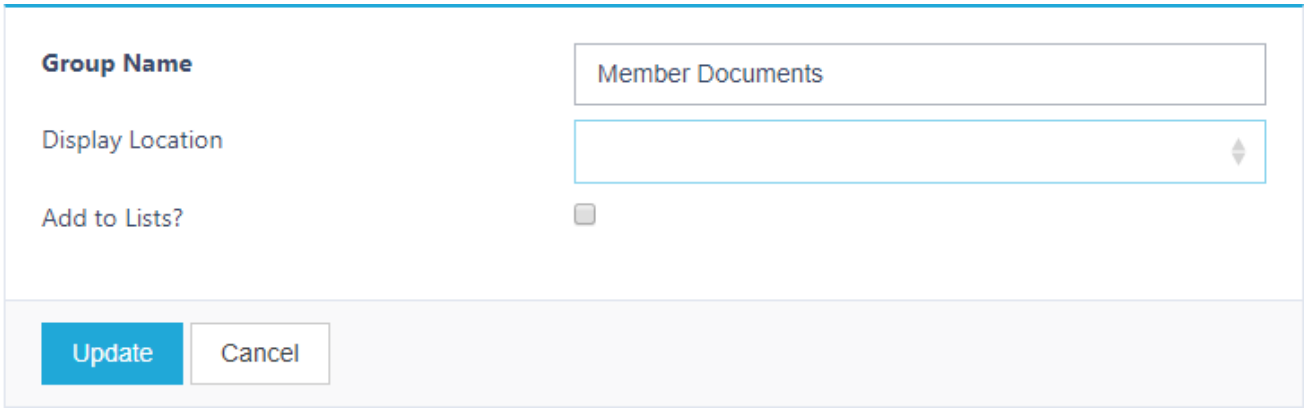
7. Click the ***Save*** link.

Person Attributes

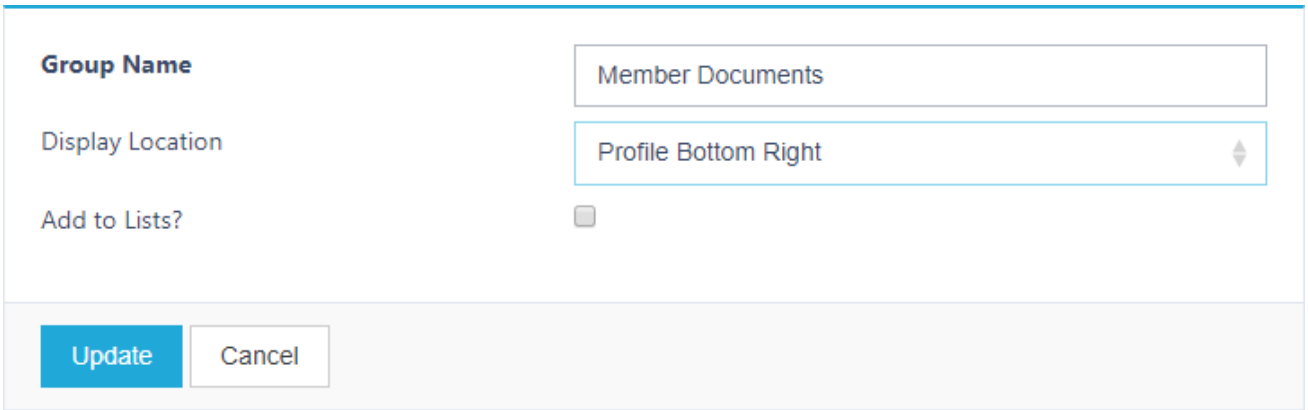
Add a Document Type to a Person Attribute

1. From the **Administration** menu, click the **Person Attributes** option located under the CUSTOMIZE heading.

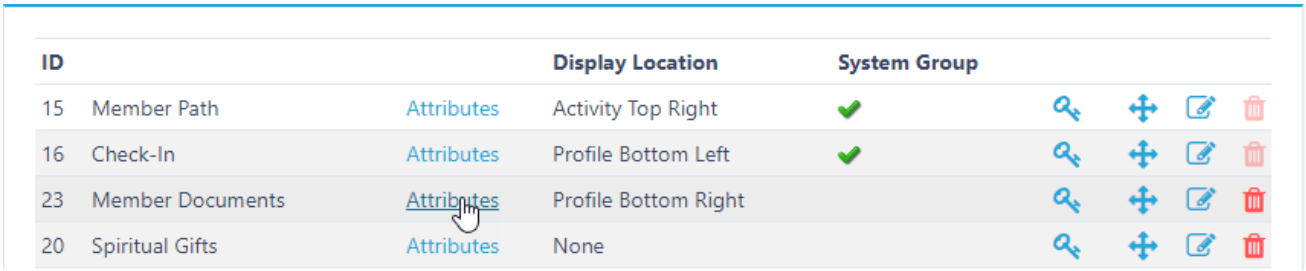
2. Click the **Add New Attribute** icon and then enter a Group Name.



3. Next, select the **Display Location** and then click the **Update** button.

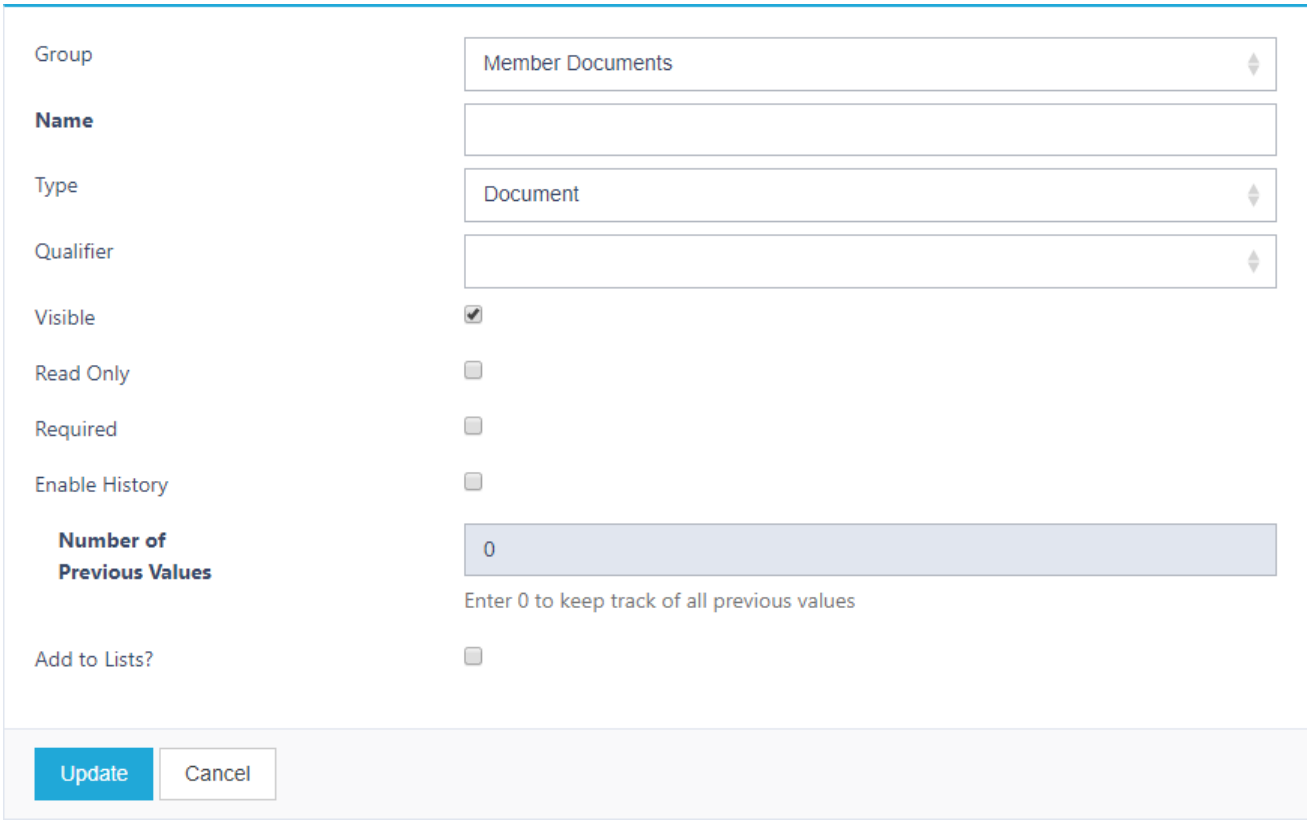


4. Click the ***Attributes*** link for the new Person Attributes.



5. Click the ***Add*** link.

6. Select the **Group**. Enter a **Name** for this attribute. Select a Document **Type**. Select a **Qualifier**. (This drop-down lists all Document Types marked to Show on the **Person Details** page.)



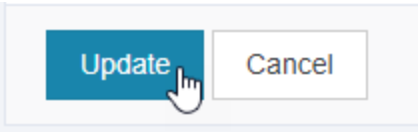
7. Make additional selections.

- **Visible**: Check this box for the uploaded documents to be visible.
- **Read Only**: Check this box for the attribute to be Read Only.
- **Required**: Check this box if users are required to upload a document, when editing this

attribute.

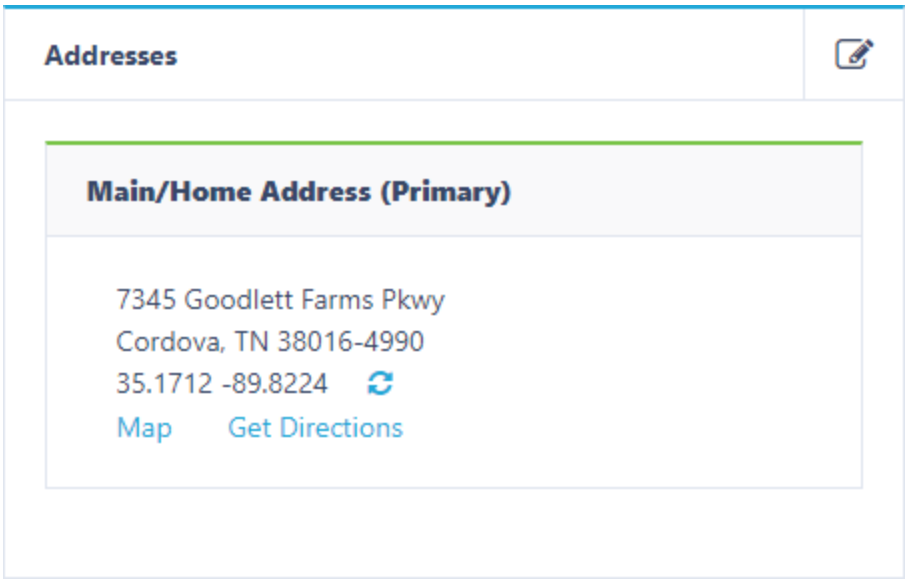
- **Enable History**: Check this box to enable history for Arena to track when the attribute is changed.
- **Number of Previous Values**: If you Enable History, enter the number of previous values to track.

8. Click the **Update** button.

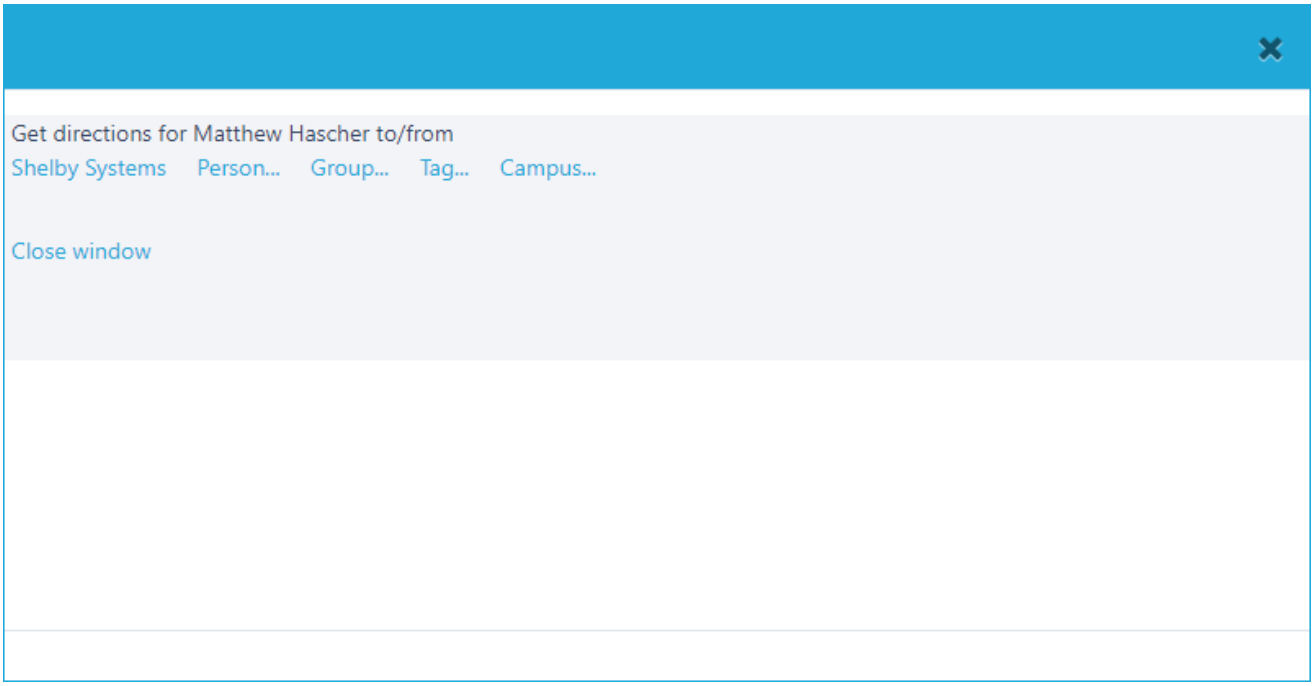


Address/Previous Address

This area displays addresses for the individual or company and the distance to your organization. Address display order is based on the order of the Address Type Lookup. If your organization has more than one campus, the distance is to the main campus.

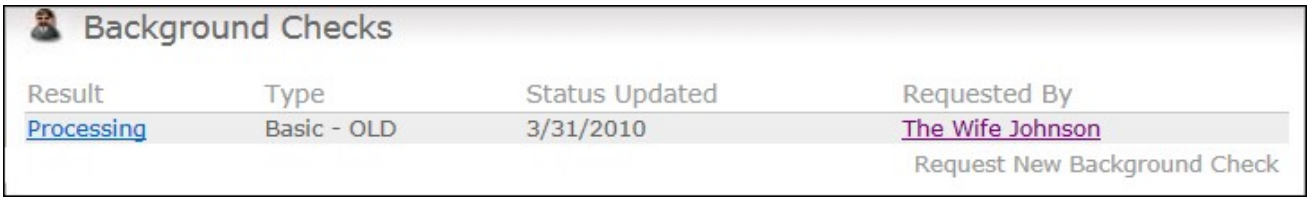


1. Click the ***Map*** link to display the address location in Google Maps in a new browser window.
2. Click the ***Get Directions*** link to get directions, via Google Maps, starting from the person's address to the organization, an existing record, a group, a tag or a campus.



Background Section

This section displays the person's background check information. If permissions allow, you can also access existing background check reports or initiate a new request.



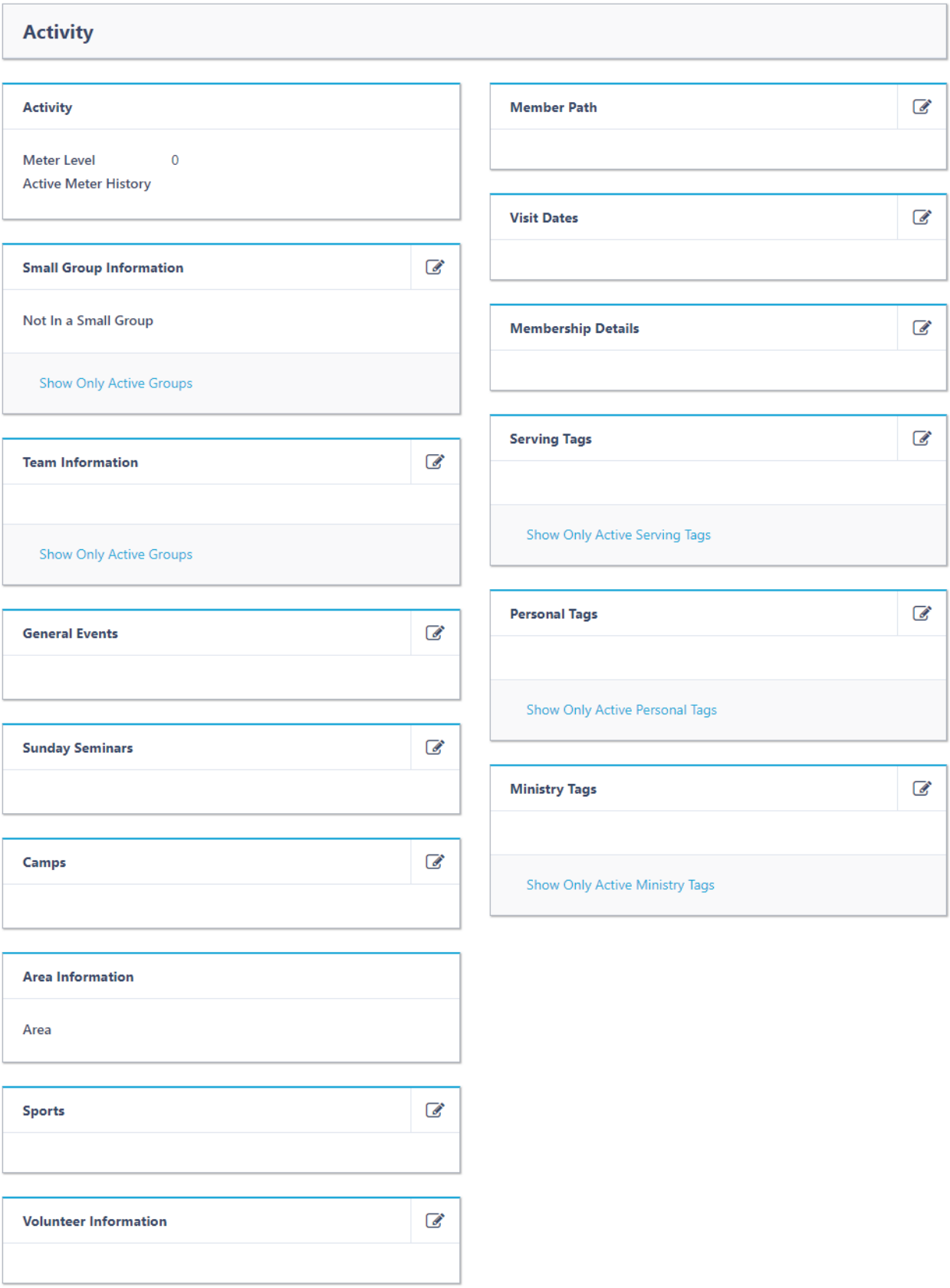
Activity Section

The activity section displays how the individual or company connects to your organization in respect to health meter, area, groups, events, member data and tags.

- **Activity**: This field displays a numerical value that represents the person's overall activity, with the strongest activity = 100. This value generates automatically and calculates using a customizable stored procedure.
- **Area**: This section displays the person's assigned geographical area. Their address is not required to be within a boundary area.
- **Small Group Information**: This section displays all groups where the person is a member, leader or pending registrant. If they are not in a Small Group, this area displays "Not in a Small Group." Groups display in Group ID order.
- **Events**: This section displays the Event Tags where the person is a registrant.
- **Sports**: This section displays sport teams where the person is a coach, player, or assistant

coach. You can customize roles.

- **Volunteer Information**: This section displays the person's volunteer information. All fields are independent fields, which your Arena Administrator can customize. Background Check data is independent from Arena's Background module.
- **Member Path**: This section displays the person's member data.
- **Visit Dates**: This section displays the person's visitation dates.
- **Membership Details**: This section displays additional member data.
- **Serving, Personal and Ministry Tags**: This section displays all tags where the person is a member and their status. When hovering over a Tag, the tag hierarchy displays.



Security Tab

At the top of the **Person Detail** page, click the **Security** tab to display the Security information for

the person or company. Click the **Add New Login** icon to add IDs. Access to tabs on the **Person Detail** page may vary by user. Family and Alternate IDs work with the custom CCV Check-In. The Person and Alternate IDs work with Arena default Check-In. Alternate IDs should not start with an “R”, “C”, or “M”, as these are reserved for Check-Out.

Individual Information | Security | Person Viewed | Contributions | Prayer Requests | Volunteer History

Arena Logins

Active	Login	Authentication Type	Last Login	Last Login IP
✔	MHascher	Database	8/21/2017 12:21:57 PM	10.10.40.65

Page: 1 of 1 Page Size: 100 Refresh 1 Login(s)

Arena Roles

Role	Notified	Sync Sources
Arena Administrators		

Page: 1 of 1 Page Size: 100 Refresh 1 Role(s)

Add Person to Role Attendance Access Add

Person IDs

Alternate ID
There are no results to display.

Page: 1 of 1 Page Size: 100 Refresh 0 Alternate ID(s)

Family IDs

Alternate ID
There are no results to display.

Page: 1 of 1 Page Size: 100 Refresh 0 Alternate ID(s)

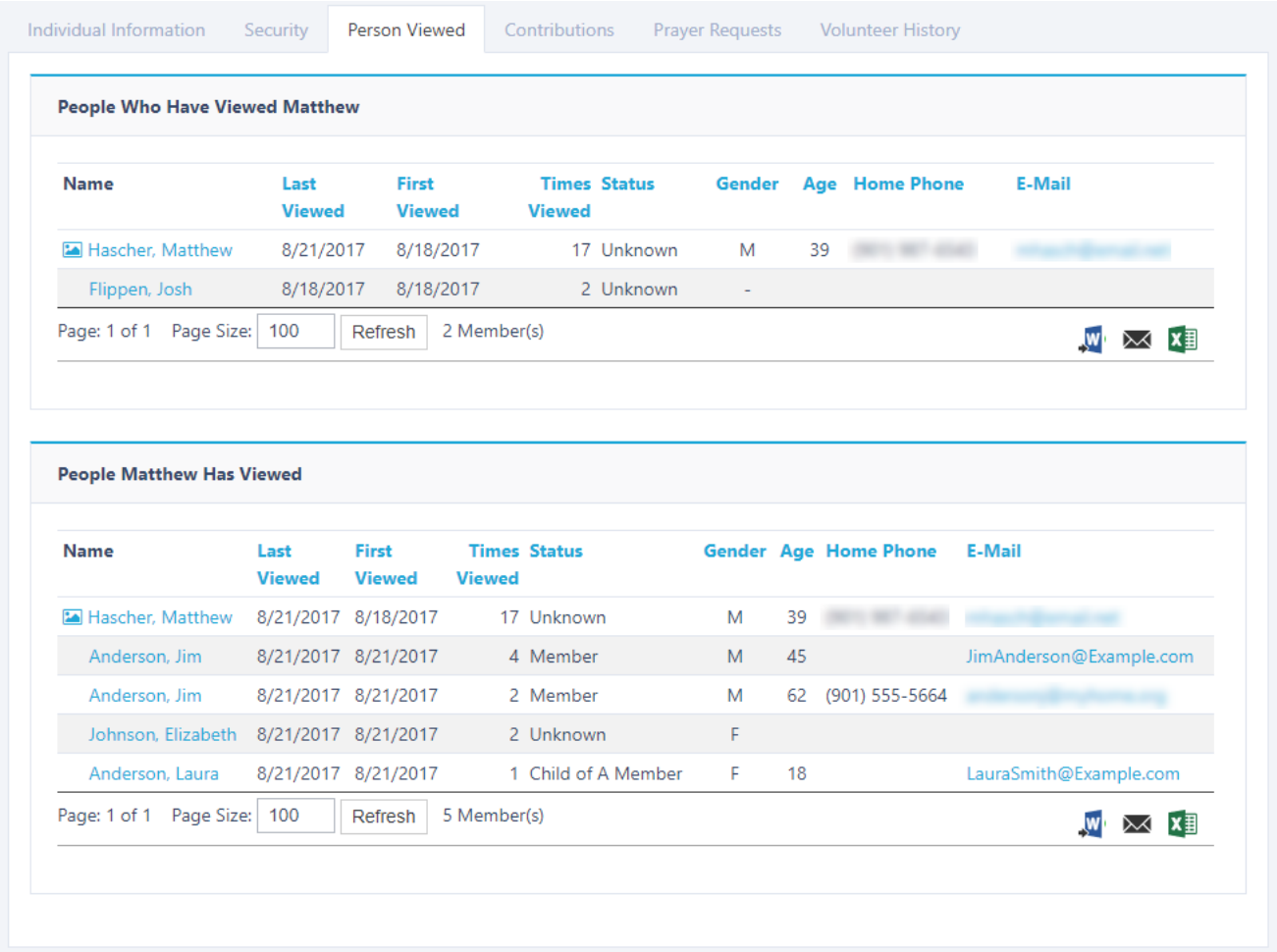
Manager IDs

Alternate ID
There are no results to display.

Page: 1 of 1 Page Size: 100 Refresh 0 Alternate ID(s)

Person Viewed Tab

The top section of this tab displays the people who have viewed your record. The bottom section of this tab displays the records that you have viewed. Both sections display the first view and last view dates along with how many times the current user has viewed the record.

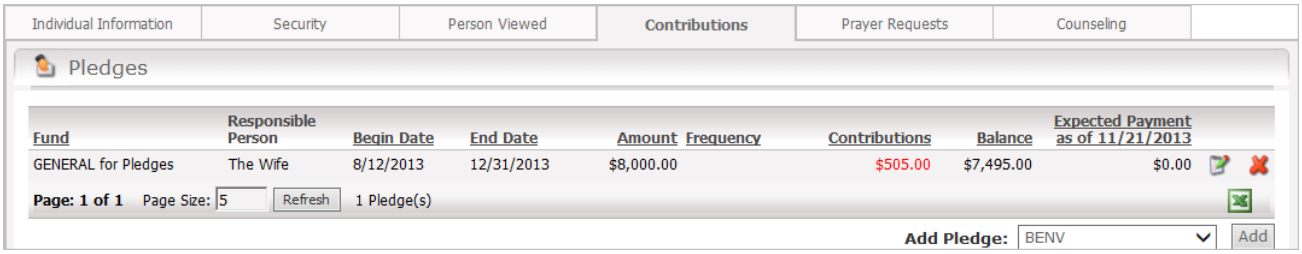


Contributions Tab

The **Contributions** tab on the **Person Details** page displays individual contribution information from open and finalized batches. The tab is in three sections - **Pledges**, **Repeating Payment** profiles, and **Contribution History**.

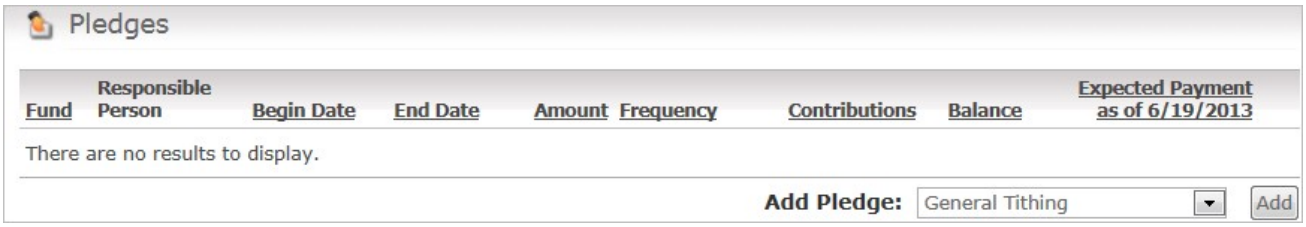
Pledges Section

Pledges entered from Pledge Quick Entry display in this section. You can also add, edit and delete pledges from this section. Permissions by user may vary.



Edit a Pledge

1. Click the **Add** button. This creates a placeholder for the pledge.



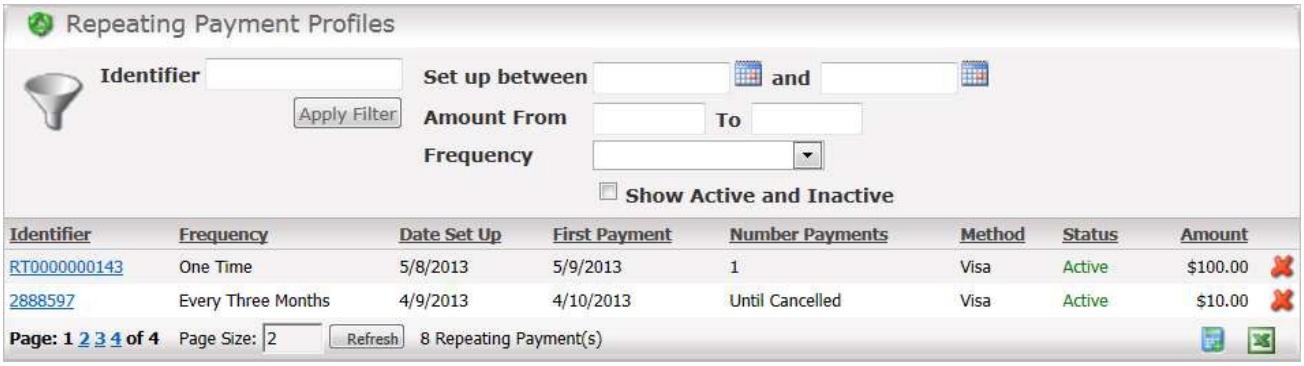
2. Click the **Edit** icon.

3. Enter the **begin date**, **end date**, **pledge amount**, and **frequency**. The payment gateway provider determines frequency options.

4. Click the **Update** icon. Pledges are retroactive, so if a contribution falls within the pledge date range it counts towards the pledge amount.

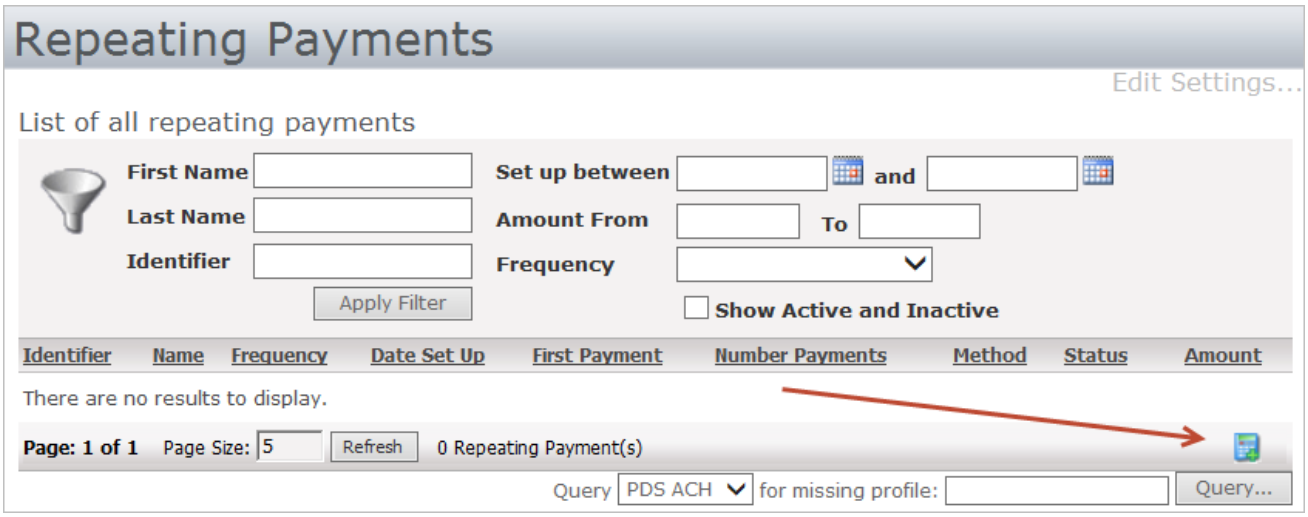
Repeating Payment Profiles

This section displays the person's repeating payments created through online giving or manual entry. If permissions allow, you can also add a new Repeating Payment from this page. (See your Arena Administrator regarding permission to add a repeating payment. An Arena-supported payment gateway is required.)

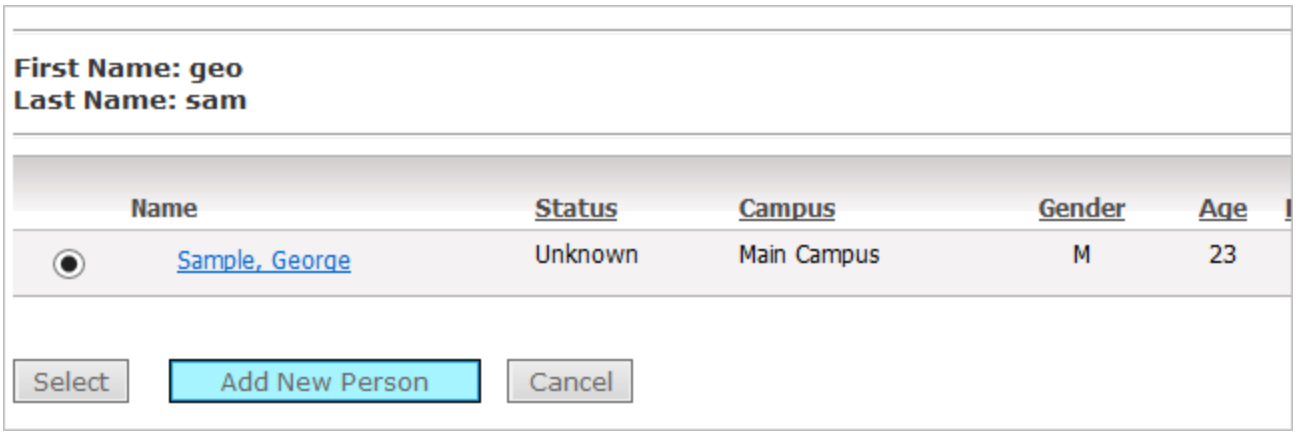


Add a Repeating Payment

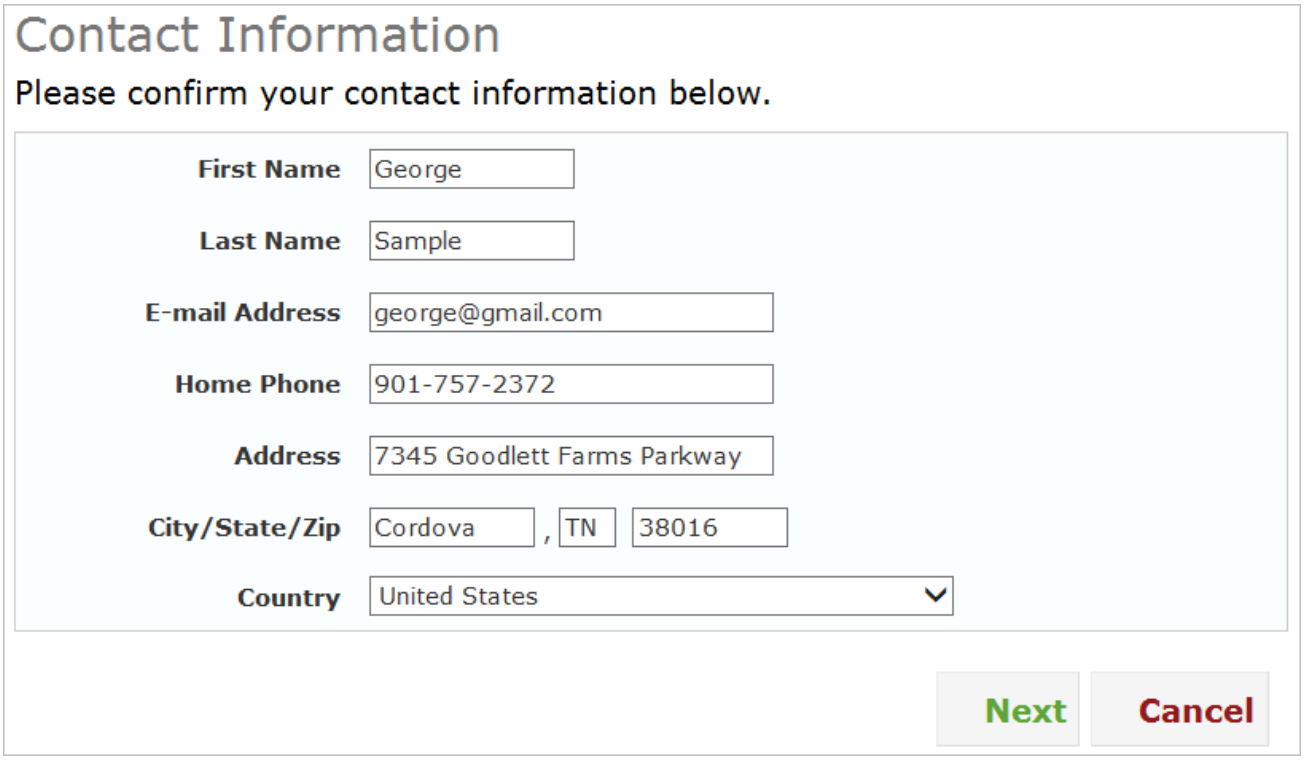
1. Click the **Add Repeating Payment** icon.



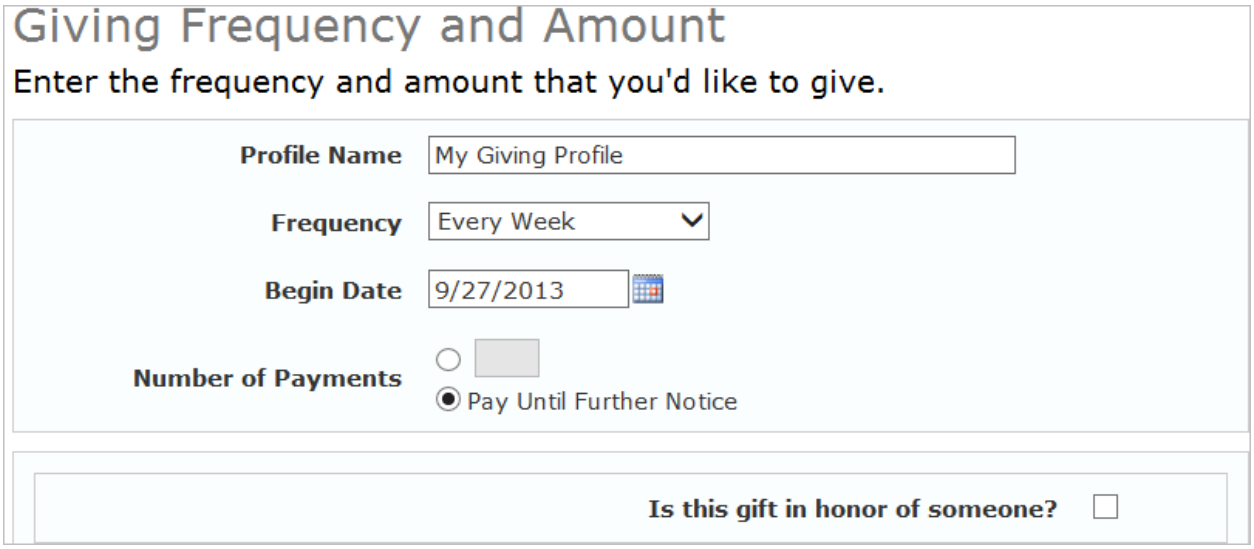
2. Search and select an existing record.



3. Enter any missing information.

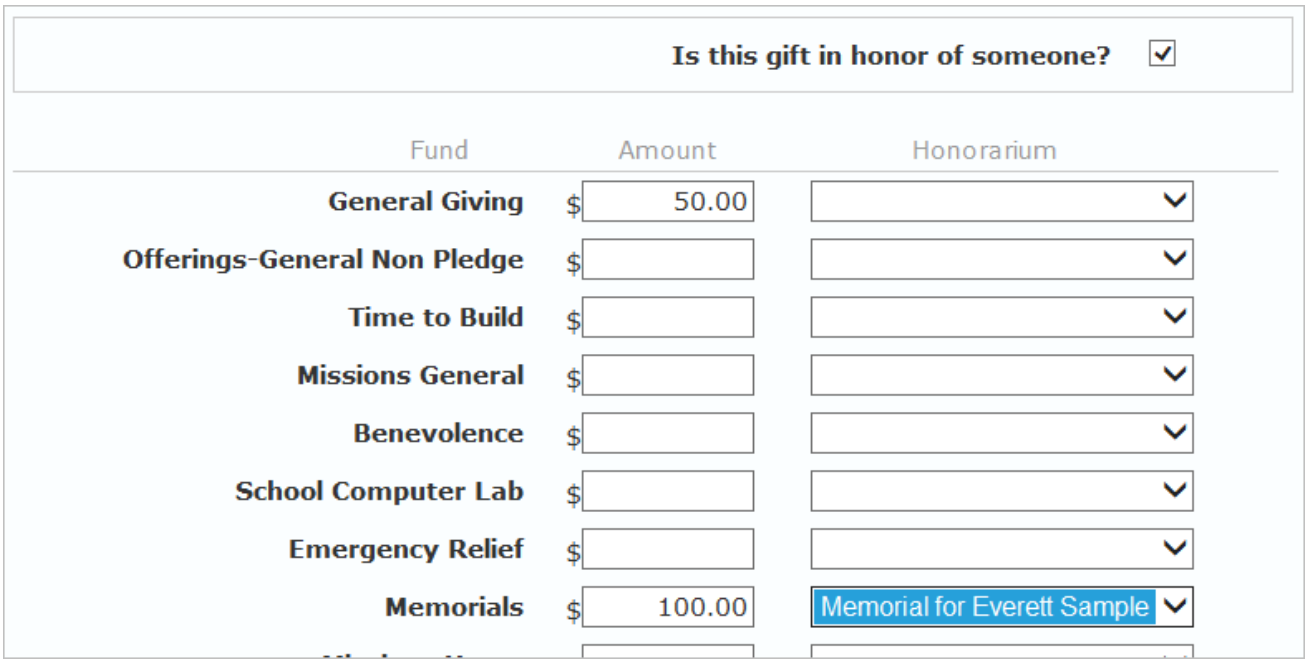


4. Enter giving profile information.
   - **Profile Name**: Arena assigns a default giving profile name which you can change
   - **Frequency**: Select the payment frequency for the repeating payment. The payment gateway provider determines frequency options.
   - **Begin Date**: Enter the date you want the repeating payments to begin. The date must be a future date.
   - **Number of Payments**: Select the top radio button to enter a specific number of payments or leave the default **Pay Until Further Notice** radio button selected.



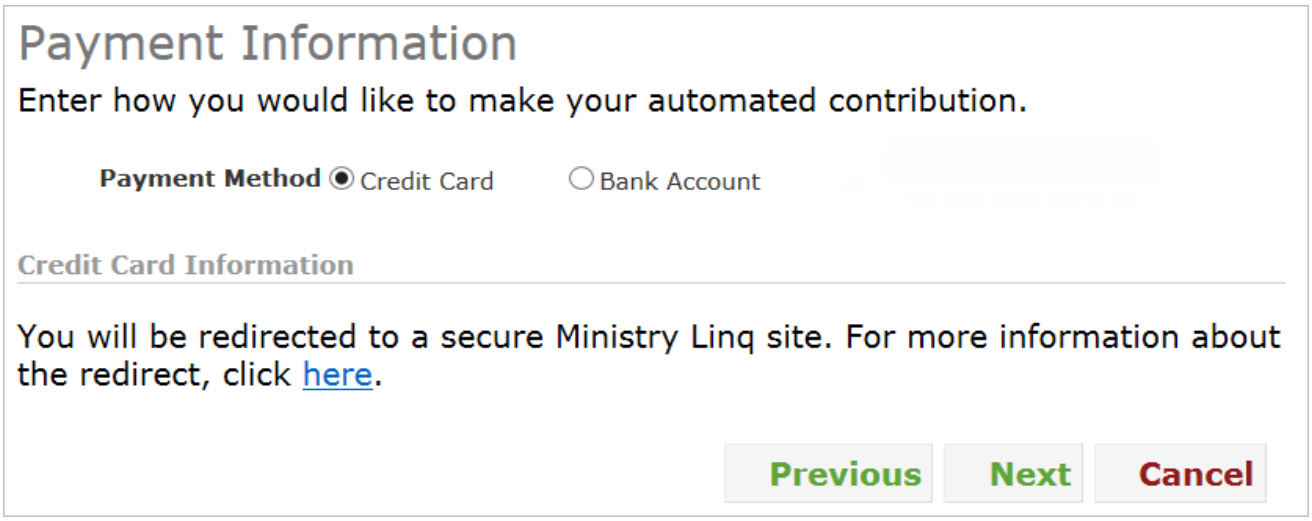
5. If using Honorariums, select the check box for **Is this gift in honor of someone?** You are able to make a specific selection below. If not using Honorariums, skip this step.

6. Enter payment information.



7. Click the **Next** button.

8. Select the **Payment Method**. This page varies based on payment gateway provider.



9. Enter the bank account information.

Payment Information

Enter how you would like to make your automated contribution.

Payment Method ○ Credit Card ● Bank Account

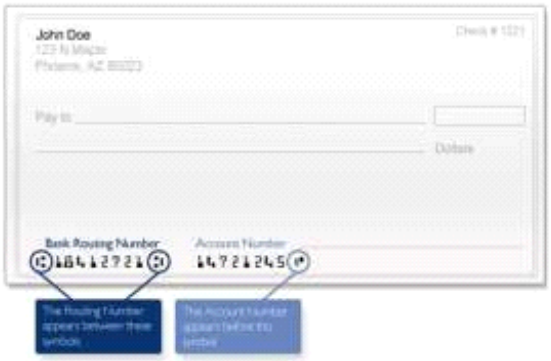
Bank Account Information

Bank Name *

Account Type ● Checking ○ Savings

Routing Number *

Account Number *



Note: Some checks also contain the check number at the bottom with the routing and account number. Please do not include the check number.

You will be redirected to a secure Payment Data Systems site. For more information about the redirect, click here.

Previous Next Cancel

10. Click the **Next** button.

11. Confirm Information.

Confirm Information

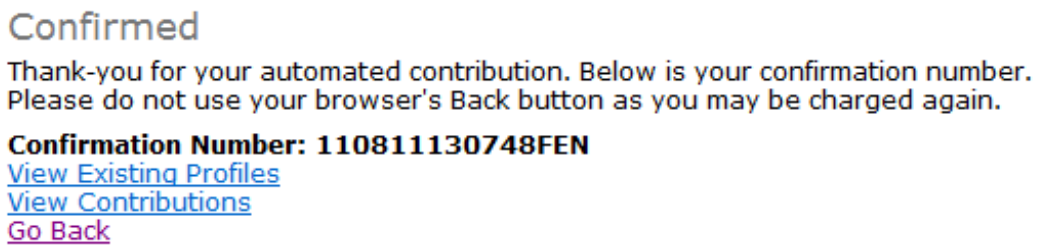
Please confirm the information below. Once you have confirmed that the information is accurate and have read the On-Line Giving Agreement please click the 'Finish' button to complete your transaction.

Name	**John Sample**
E-mail Address	**jsample@gmail.com**
Home Phone	**901-7572372**
Address	**7345 Goodlett Farms Parkways**
City/State/Zip	**Cordova, TN 38016**
Country	**United States**
Profile Name	**My Giving Profile**
Frequency	**Once a Month**
Begin Date	**8/12/2011**
Number of Payments	**Until Further Notice**
General Fund from Early Service	**$50.00**
Worldside Missions	**$25.00**
Total Contribution:	**$75.00**
Payment Method	**Bank Account**
Bank Name	**first national bank**
Account Type	**Checking**
Account Number	**123456789**
Routing Number	**555555550**

By clicking the 'finish' button below I agree to allow Your Church Description to debit the amount above from my account. I acknowledge that I may update the transaction information at any time by returning to this website, or by calling the Finance Office.

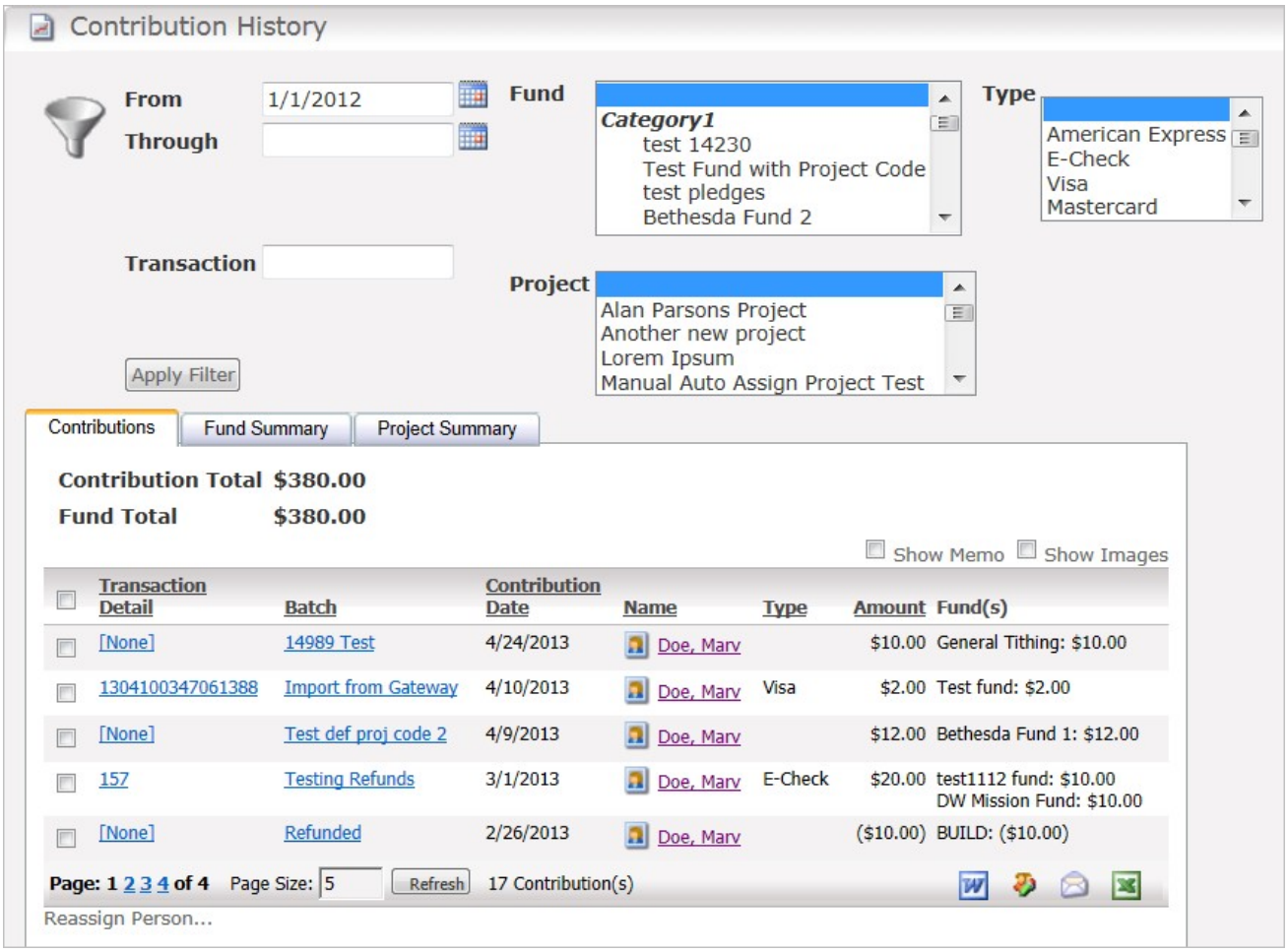
Previous Finish Cancel

12. Click the **Finish** button. The below **Confirmation** page displays.



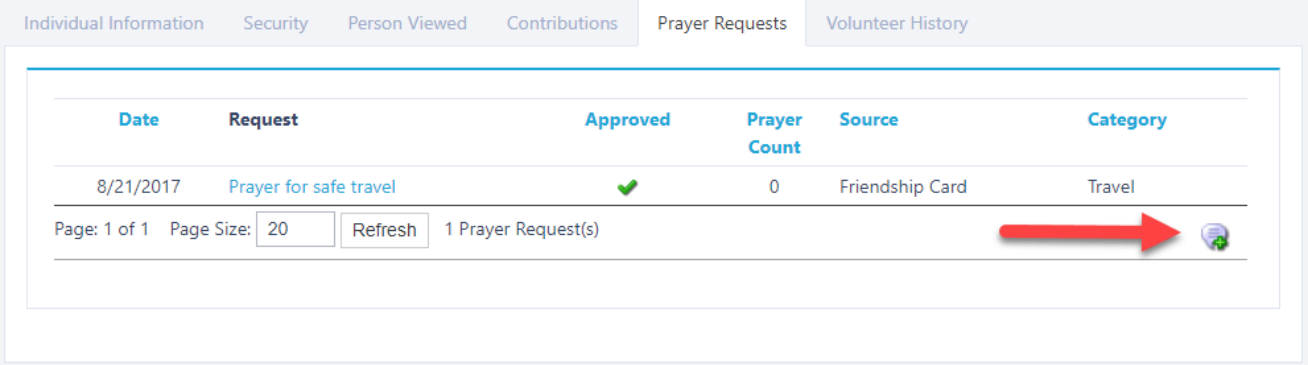
Contribution History

This section displays all contribution and online giving history for the individual or company. Use the filters to filter contributions by date range, fund, type, or transaction number. Click the ***Reassign Person*** link to associate a single or multiple contributions to a different person. Select the **Show Memo** check box to display memos enter during contribution processing. Select the **Show Images** check box to display scanned checks.



Prayer Requests Tab

The **Prayer Requests** tab displays any prayer requests entered for you or another person.



1. Click the **Add New Prayer Request** icon to add a new Prayer Request for you or another person.

2. Click the ***Request*** link to view the Prayer Details.

Add a Prayer Request

1. Click the **Add New Prayer Request** icon.

2. Enter **First** and **Last Name**, if not automatically populated. Enter your name or the person you are praying for.

3. Enter **Email**, if not automatically populated.

4. Select a **Prayer Category**.

5. Select the **Request Response** check box if the requester would like to receive an email response.

6. Select the **Private** check box if this prayer request should only be available to prayer team members who have the permissions to view private prayer requests.

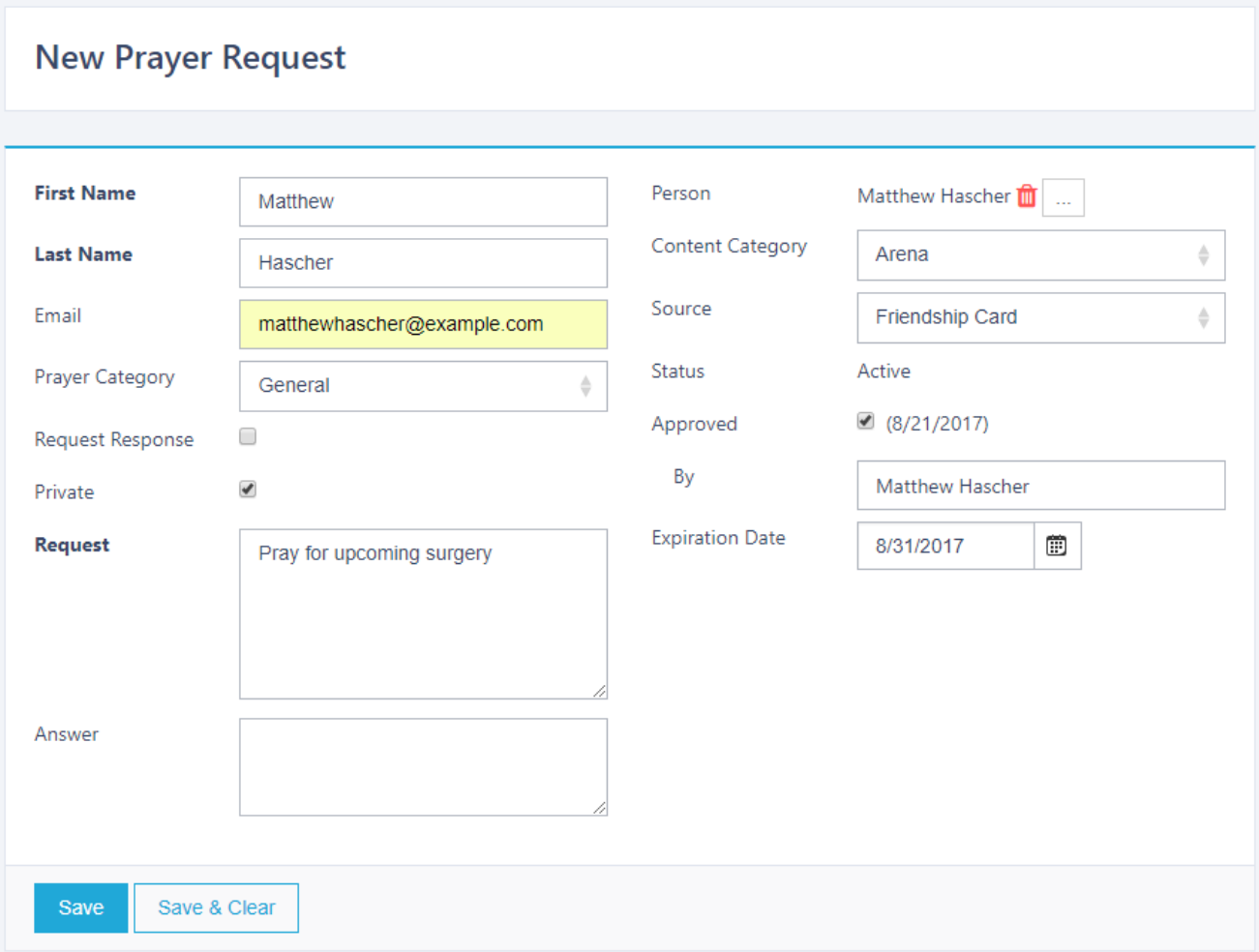
7. Select a **Content Category**. This drop-down option is applicable when entering prayer requests from the Arena-managed website.

8. Select a **Source**. This field is to identify the method of obtaining the prayer request. Default **Status** is active.

9. **Approve** the prayer request if you have permission. (See your Arena Administrator regarding permission options for prayer requests.)

10. Enter the **Expiration Date** for this prayer request. Renewal option is available.

11. Enter the Prayer Request in the **Request** field.



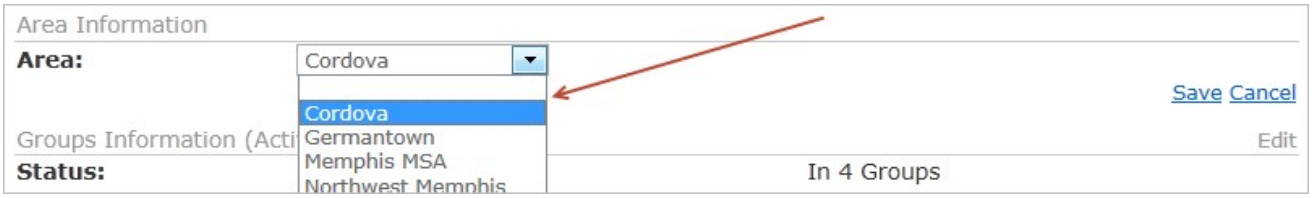
12. Click the **Save** button.

Edit Sections on Person Detail Page

Edit Area

1. Click the ***Edit*** link for the Area section.

2. Select an **Area**.



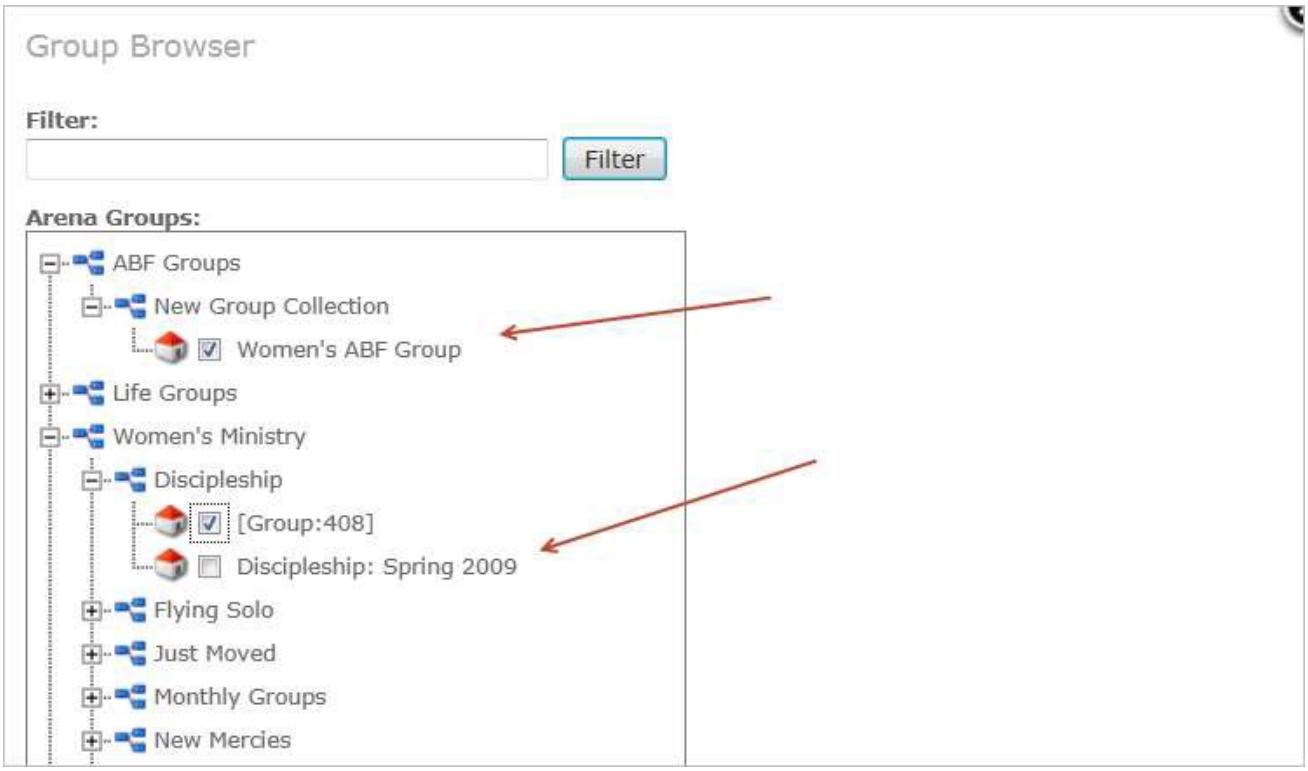
3. Click the ***Save*** link.

Add Someone to a Group from the Person Detail Page

1. Click the ***Edit*** link.

2. Click the ***Assign Groups*** link.

3. Expand the Group Tree to select the Group(s).



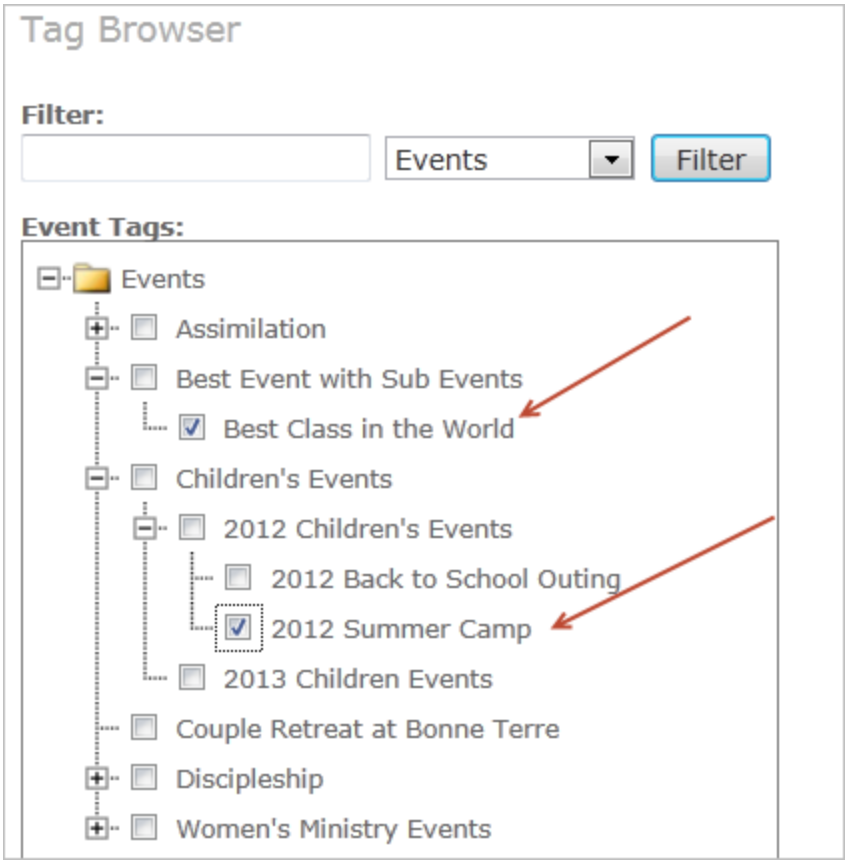
4. Click the **OK** button.

Add Someone to an Event Tag

1. Click the ***Edit*** link.

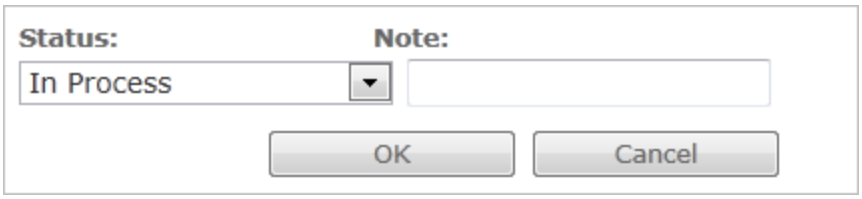
2. Click the ***Assign Events*** link.

3. Expand the Tag Tree to select the Tags(s).



4. Select **Status**.

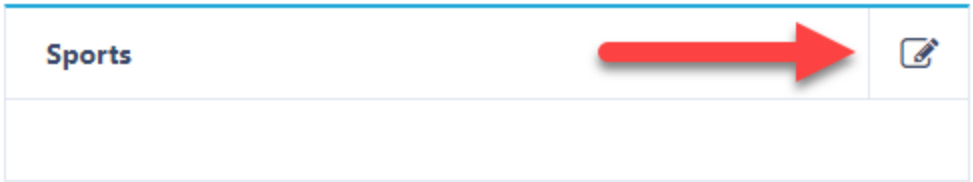
5. Enter a **Note**, if desired.



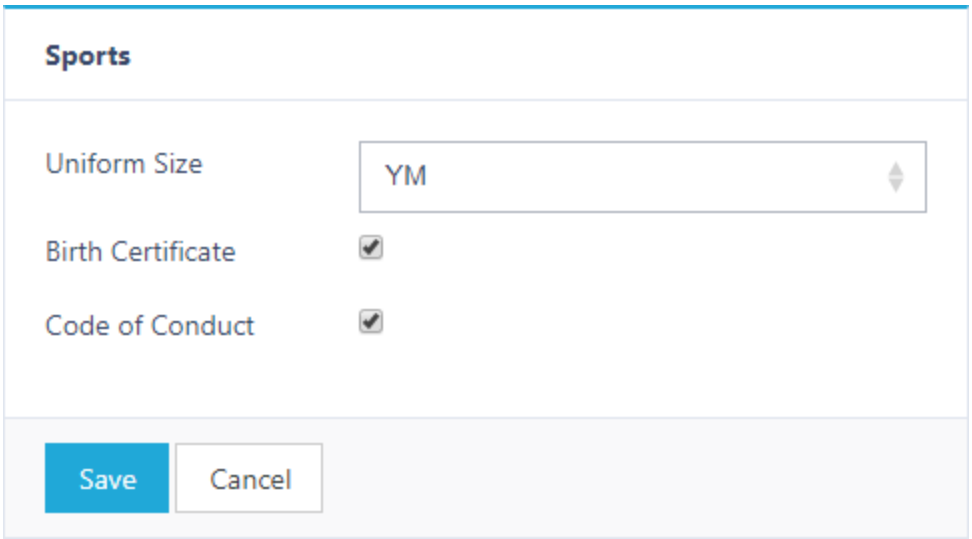
6. Click the **OK** button.

Update Sports Information

1. Click the **Edit** link.



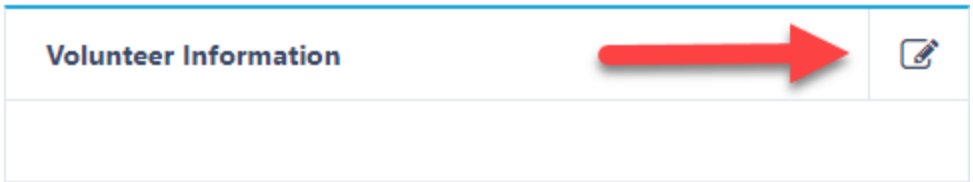
2. Select and/or enter data.



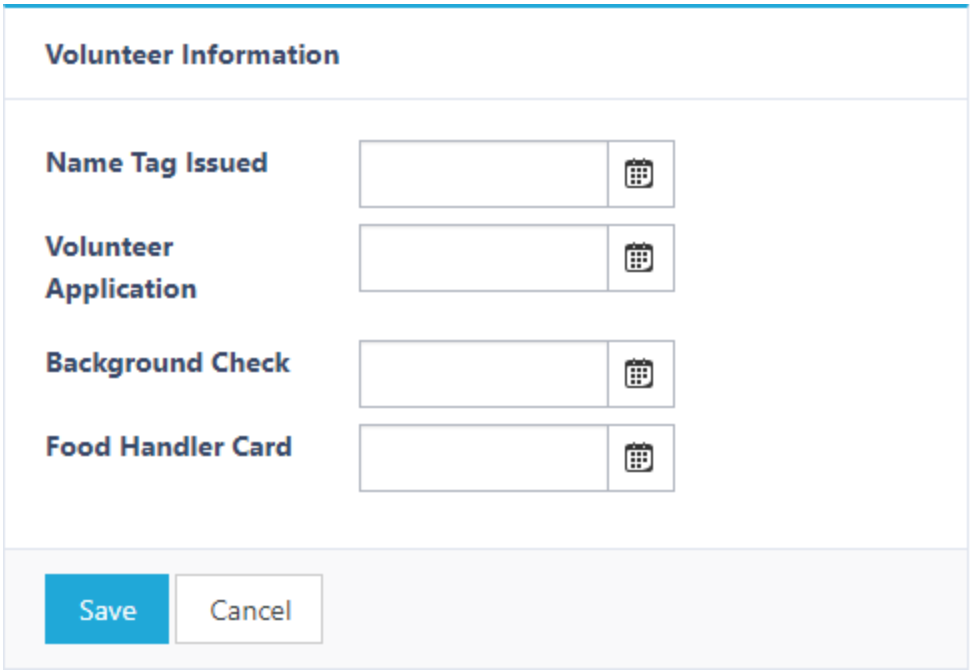
3. Click the ***Save*** link.

Update Volunteer Information

1. Click the ***Edit*** link.



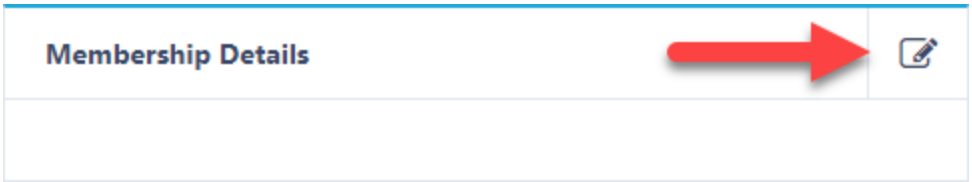
2. Enter dates in **MMDDYY** or **MMDDYYYY** format or click the **Calendar** icon to select dates.



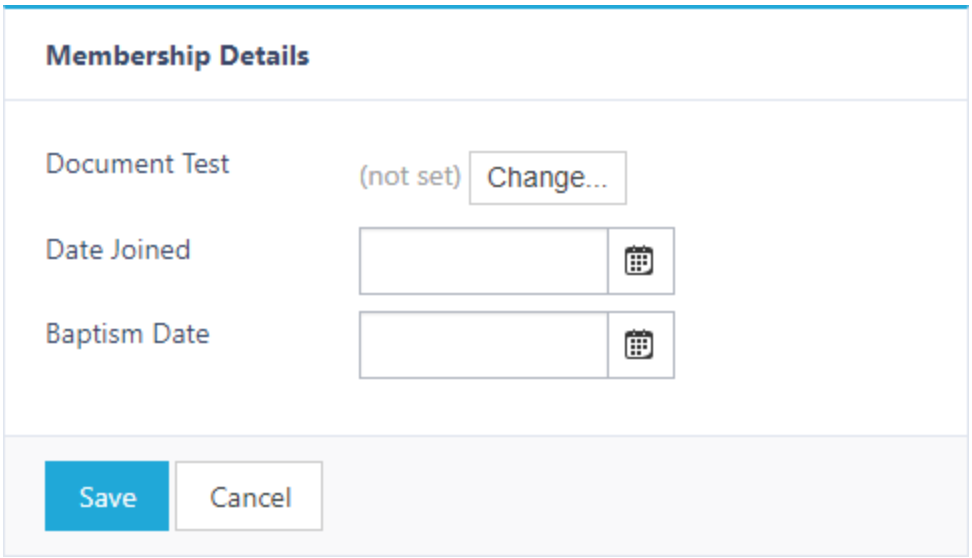
3. Click the ***Save*** link.

Update Member Path Information

1. Click the ***Edit*** link.



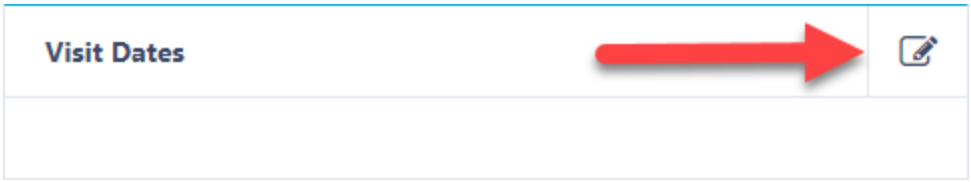
2. Update all fields, as desired.



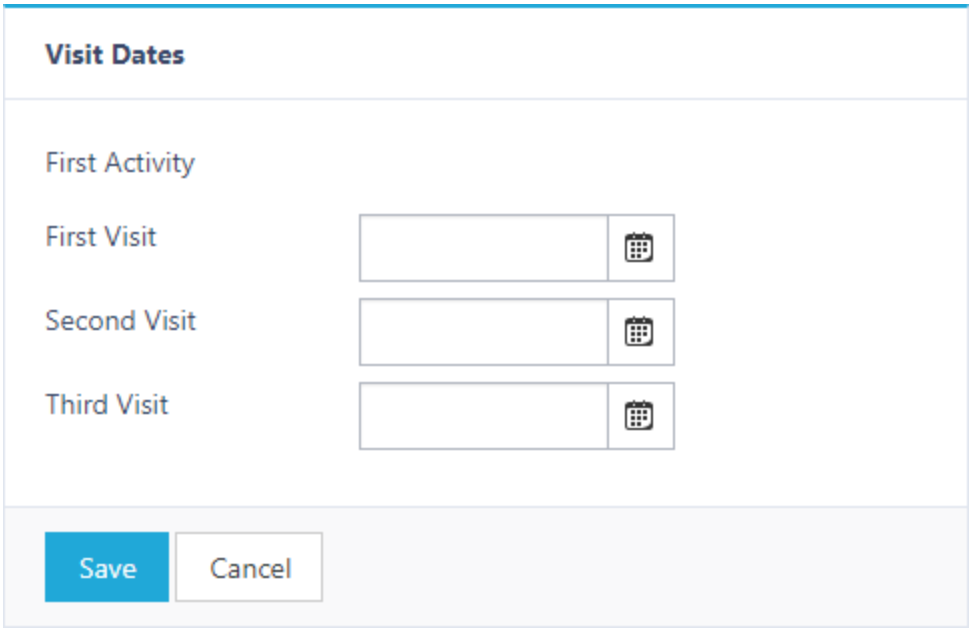
3. Click the ***Save*** link.

Update Visit Dates

1. Click the ***Edit*** link.



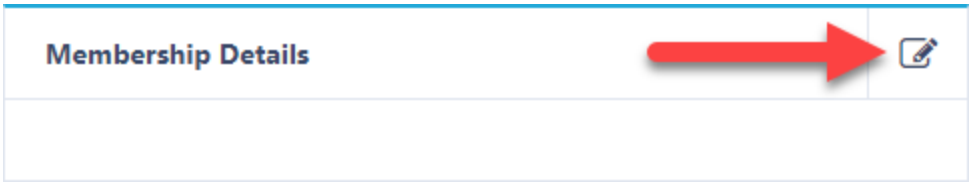
2. Update all fields, as desired.



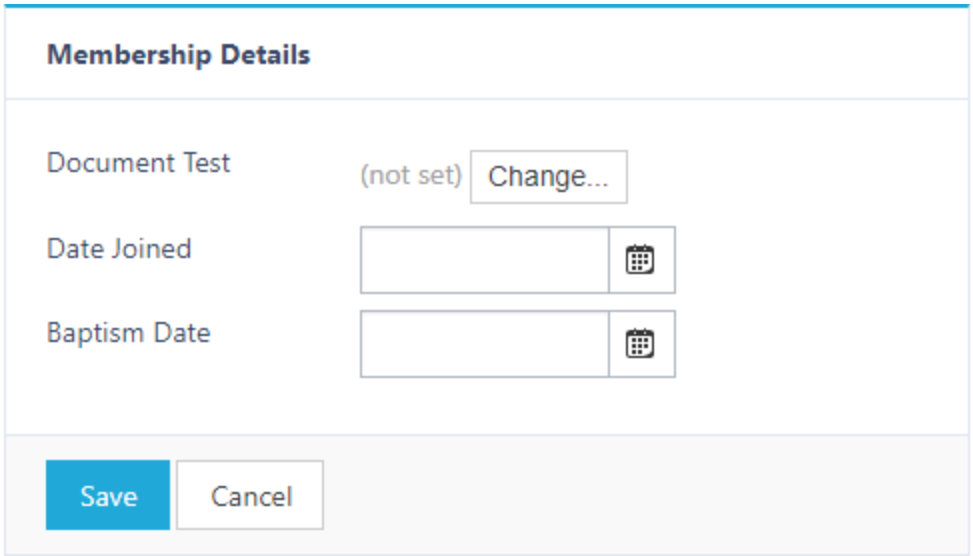
3. Click the ***Save*** link.

Update Membership Details

1. Click the ***Edit*** link.



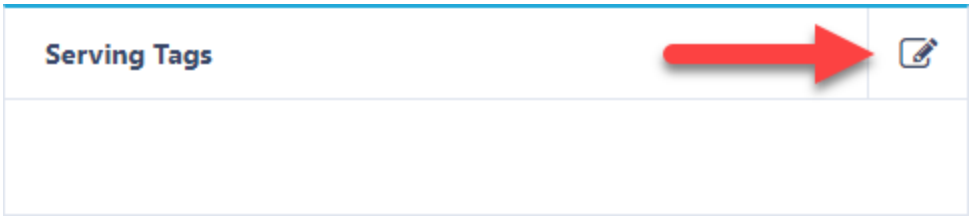
2. Update all fields, as desired.



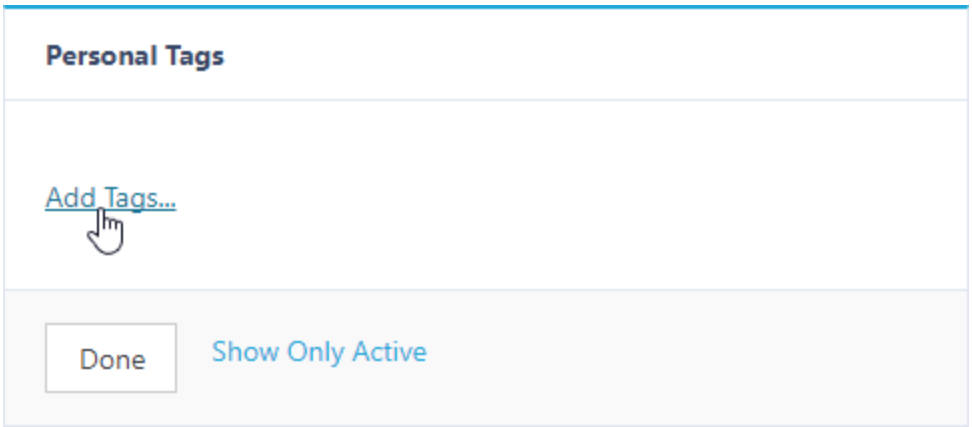
3. Click the ***Save*** link.

Add Someone to a Personal, Serving, or Ministry Tag

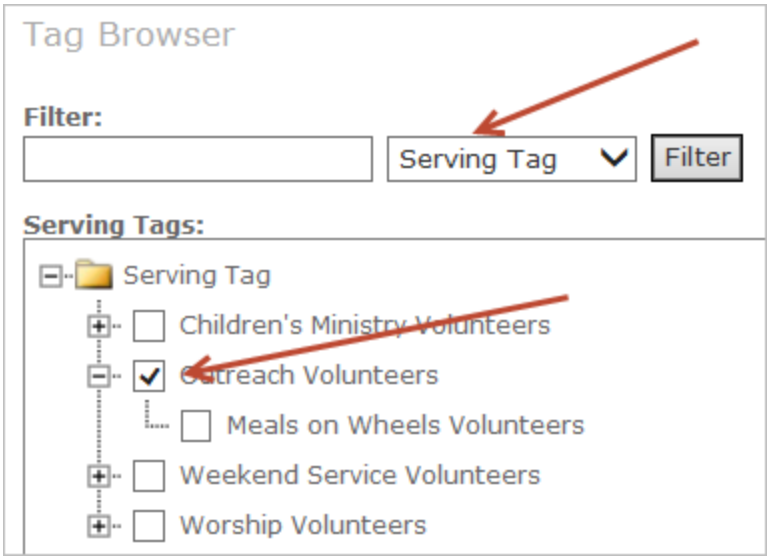
1. Click the ***Edit*** link.



2. Click the ***Add Tags*** link.



3. Click the **Tag Filter** to select the tag type.

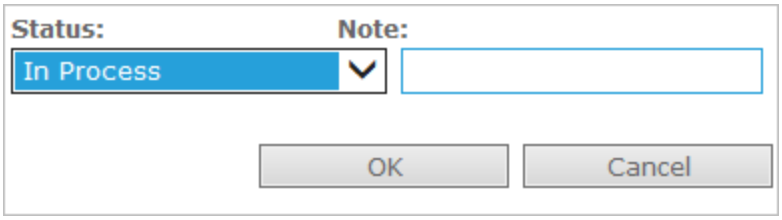


4. Then select the tag to which you want to add the person.

5. Select **Status**. Selected Status applies to all selected Tags.

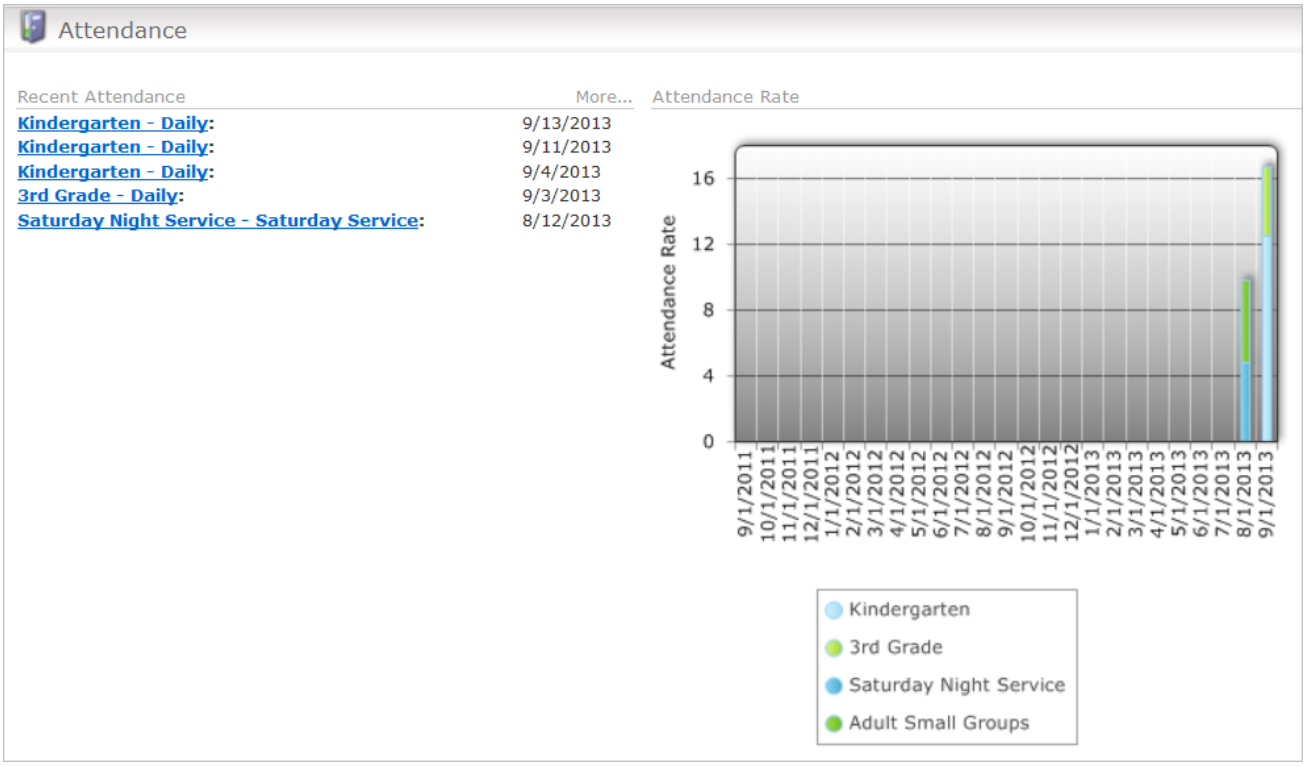
6. Enter a **Note**, if desired. Notes apply to all selected Tags.

7. Click the **OK** button. If selecting multiple Tags, the status and note applies to all tags.



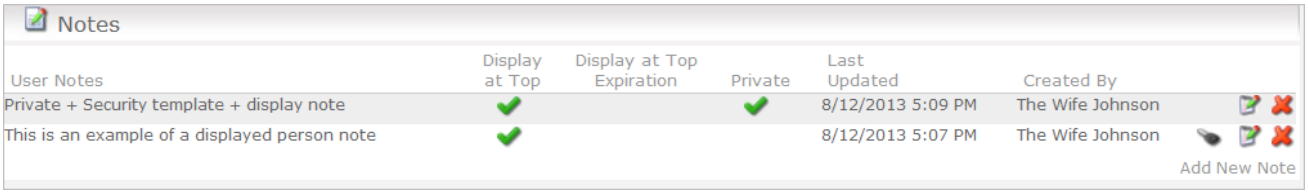
Attendance Section

This section displays the person's recent attendance. The left side displays all attendance. The right side displays attendance for Attendance Types marked "Weekend" The default attendance history is 24 months. See your Arena Administrator to customize the months of attendance to display.



Notes Section

You can add notes to a person's record from this section. You can view the notes in this section and display the note at the top of the **Person Detail** page.

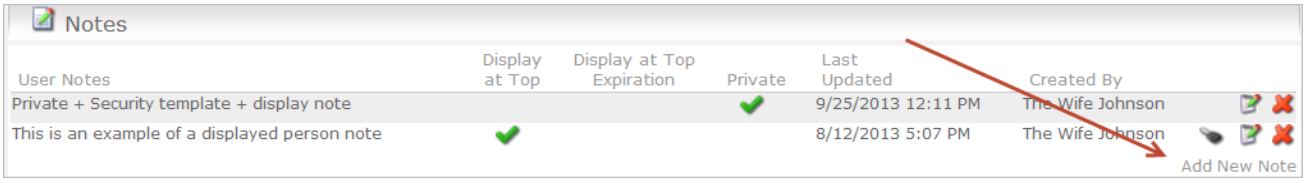


Note Checked to Display

Add a Note

Search and select the record you wish to add a note.

1. Click the ***Add New Note*** link.

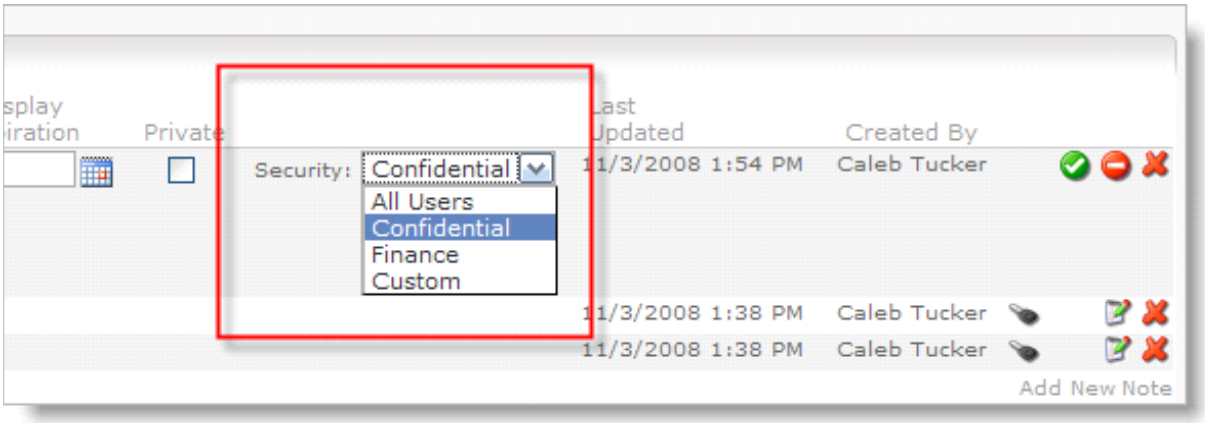


2. Enter the desired note, making any additional selections.
   - **User Notes**: Enter the note in this field.
   - **Display at Top**: Check this box to display the note at the top of the record. Displayed notes list in order, with the most recent note entry at the top of the list.
   - **Display at Top Expiration**: Enter or select a date for a displayed note. When the displayed note expires, it still displays in the Notes section.
   - **Private**: Notes marked private display only for the user that marks the note private.
   - **Security**: This is a customizable Security Template. Each security template can include various users and security groups. You can mark a note to display and private. In this case, only the current user is able to view the displayed note. See your Arena Administrator for additional information.

3. Click the **Update** icon.

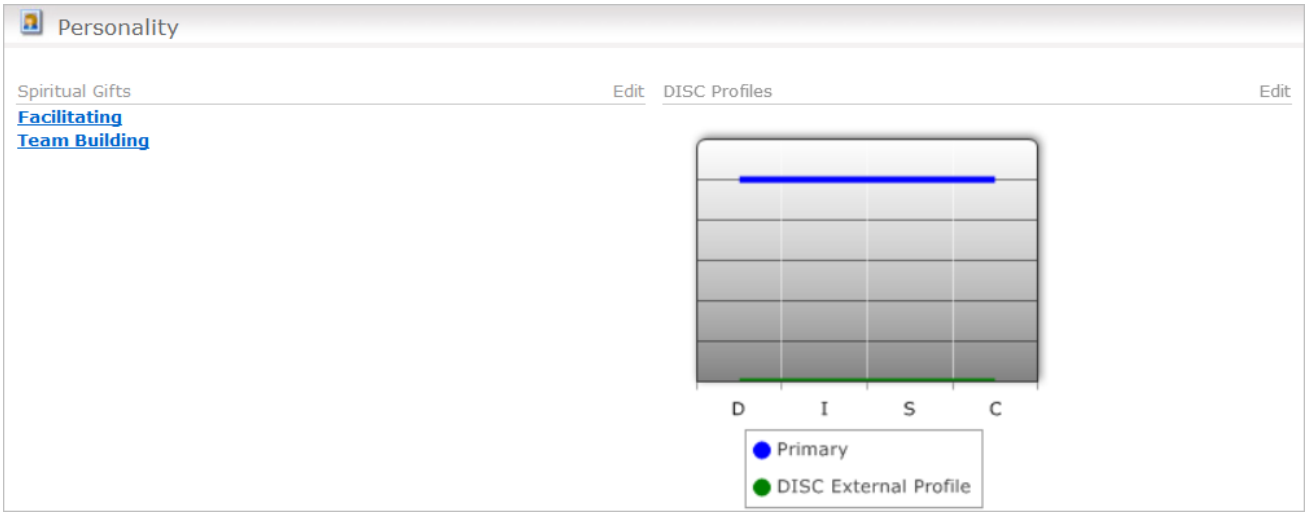
Applying Security Templates to Person Notes

With a Person Note Security Template available, users can add the security template to a person note allowing other users access to notes marked private. Refer to the User Online Help for more information regarding creating Person Notes.



Personality Section

Spiritual Gifts and DISC Profiles are both optional settings to be determined by your organization. DISC Profiles are based on the DISC profiling personality trait system. Spiritual Gifts can be setup to display individual gifts. DISC stands for Dominance, Influence, Steadiness, and Conscientiousness. Several organizations offer this testing. Arena tracks it for you if you choose to implement it. Click the ***Spiritual Gift*** link to display a list of the other records that have the same gift.



- **Spiritual Gifts** – Your organization can customize this section to display spiritual gifts. Click a ***Spiritual Gift*** link to display a list of records that have the same gift.
- **DISC Profiles** – This section displays specific value from the DISC assessment.

History Section

Check the View History box on the right side of this section to display the person's history that pertains to person updates, person attribute updates, email communications, security changes, small group changes, tag changes and web activity. Each subsection has a drop-down box to view the last 5,100, or all actions. Arena honors security for this section. For example, if a user does not have permission to view security history, Arena does not display this section.

History

View History

Person Updates — Display: 5

Previous Address Address changed from '1248 Eagle Nest Ln ...	9/25/2013 11:49 AM	The Wife Johnson
Main/Home Address Address changed from '' to '1248 Eagle...	9/25/2013 11:49 AM	The Wife Johnson
Primary Address changed from '' to 'Main/Home Address'	9/25/2013 11:49 AM	The Wife Johnson
Main/Home Address Address changed from '1740 Meadow River Cv...	9/25/2013 11:48 AM	The Wife Johnson
SSN Record Updated (Details unavailable due to security)	9/25/2013 10:20 AM	The Wife Johnson

Person Attribute Updates — Display: 5

Teacher changed from 'False' to 'True'	9/25/2013 12:28 PM	The Wife Johnson
First Visit changed from '11/5/2007' to '8/11/2013'	8/12/2013 10:14 PM	The Wife Johnson
Hire Date changed from '' to '11/5/2007'	8/12/2013 7:36 PM	The Wife Johnson
Supervisor changed from 'Unknown' to 'Gary Johnson'	8/12/2013 7:36 PM	The Wife Johnson
Department changed from 'Unknown' to 'Arena'	8/12/2013 6:25 PM	The Wife Johnson

Email Communications — Display: 5

Subject: ; From:	9/25/2013 8:00 AM	batch_send_critical_serving_members
Subject: ; From:	9/24/2013 8:00 AM	batch_send_critical_serving_members
Subject: ; From:	9/21/2013 8:00 AM	batch_send_critical_serving_members
Subject: ; From:	9/19/2013 8:00 AM	batch_send_critical_serving_members
Subject: ; From:	9/18/2013 8:00 AM	batch_send_critical_serving_members

Security — Display: 5

Global Admins: Added to role	9/5/2013 5:46 AM	The Wife Johnson
Global Admins: Removed from role	8/20/2013 11:02 AM	The Wife Johnson
Arena Administrators: Added to role	8/20/2013 11:02 AM	The Wife Johnson
Arena Administrators: Removed from role	8/19/2013 8:24 AM	The Wife Johnson
Global Admins: Added to role	8/15/2013 2:31 PM	The Wife Johnson

Small Group Member — Display: 5

Business Information

Businesses display in the same format as an individual record with the exception of the name fields. The first, middle and nickname fields are not applicable.

Personal Information — Edit

Person/Foreign ID:	344/0
Member Status:	Member
Record Status:	Active
Campus:	Campus 1
Name:	Shelby Systems
Date Added:	4/27/2010
Date Modified:	4/27/2010
Date Last Verified:	4/27/2010 Verify

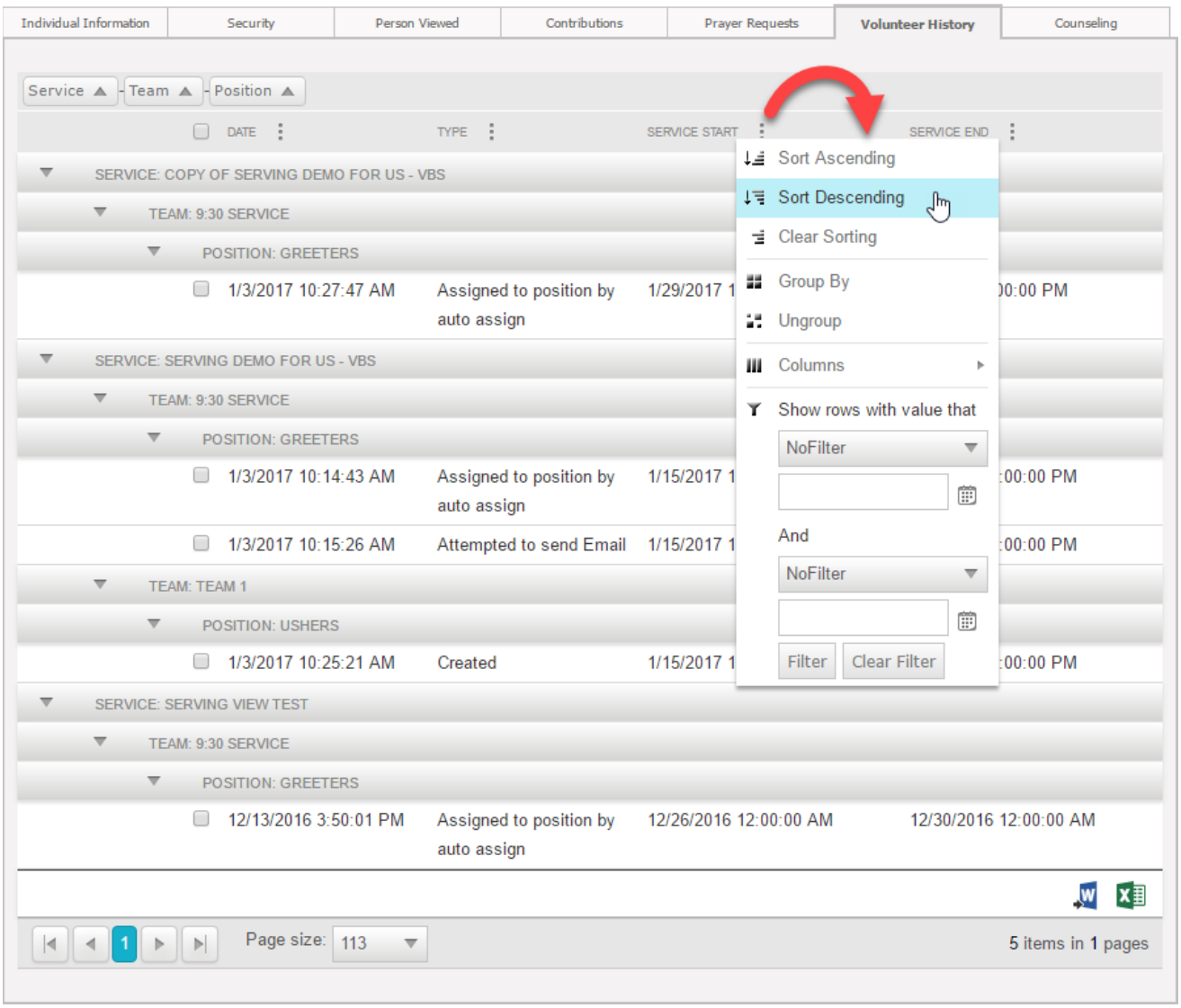
- Person ID/Foreign ID (Foreign ID = Shelby Systems Name ID if synchronized with Shelby Systems Shelby v.5 software)
- Member Status
- Record Status
- Campus
- Name
- Date Added (to Arena)
- Date Modified
- Date Last Verified (Click the ***Verify*** link to update when the record was last confirmed to be

correct.)

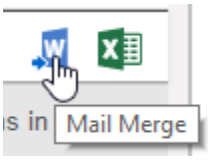
Volunteer History Tab

The Volunteer History Tab allows you to view the services and positions assigned to an individual.

1. Click the **Menu** icon next to a column header to sort or filter the grid by the options listed.



You have the ability to export the positions to both Word or Excel by selecting at least one position on the grid and then clicking the Mail Merge or Export to Excel icons at the bottom.



Counseling Tab

The counseling feature enables your organization to record and secure confidential information for the counseling ministry. Along with recording counseling notes, you can customize counseling concerns, counseling restrictions and counseling statuses. Restrictions display on the **Person Detail** page as a means to communicate with other staff when an individual should be restricted from a specific area or subtlety flag a record. You can also customize the Counseling Status Lookup to display a symbol or letter for flagged records.

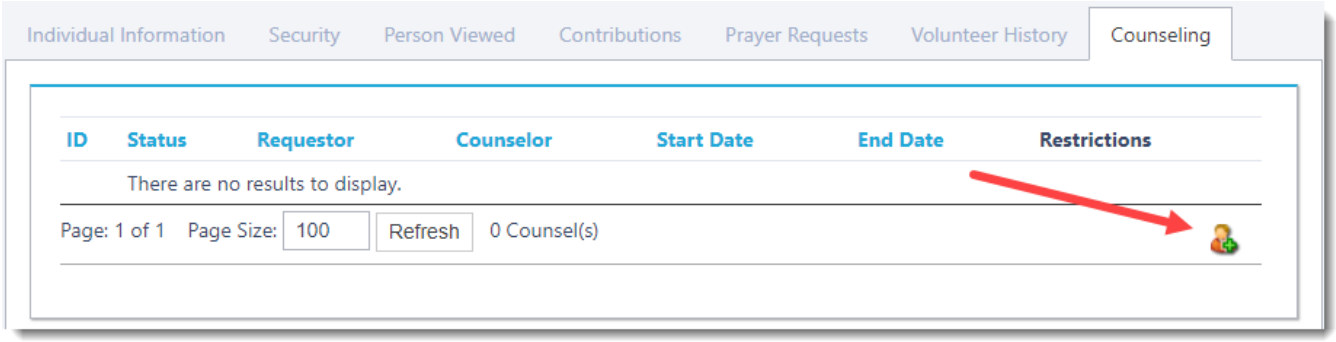
Customization Options

- Create a Ministry Tag consisting of existing records you want to identify as counselors. Add this tag # to the Counseling Team Member Profile Organization Setting. You can obtain the tag profile_id from the URL when you select the Tag (http://arena/default.aspx?page=25&profile=171), or in the core_profile Arena SQL table.
- Customize the **CounselingRestrictionIdentifier** Organization Setting. The default setting [R] displays on a record where the "Show Restriction" Lookup value is set to "True." You can change the default "R" value by entering the desired value, such as * in the Value field.
- Customize Counseling Pastoral Concerns, Counseling Restrictions, and Counseling Status Lookups. Add "true" to a Counseling Restriction to allow users to enter a note for the restriction. Add "true" for Show Restriction to a Counseling Status to display the Restriction Identifier for the status. Add "true" for Set End Date for a Counseling Status to allow user to set an end date for the status.
- Add a Counseling child page to the **Person Detail** page and set to not display in navigation.
- Add the Counseling and Counseling Request modules to this page.
- Set security for each module. Users with view and edit permission for the Counseling Request module can create a new counseling request. Users with view and edit permission for the Counseling module have full access to Counseling.
- Add the new **Counseling** page as a tab to the **Person Detail** page, as shown on the next page.
- Customize the Counseling Request System Email.

Add a Counseling Request

1. Click the **Counseling** tab on the **Person Detail** page.

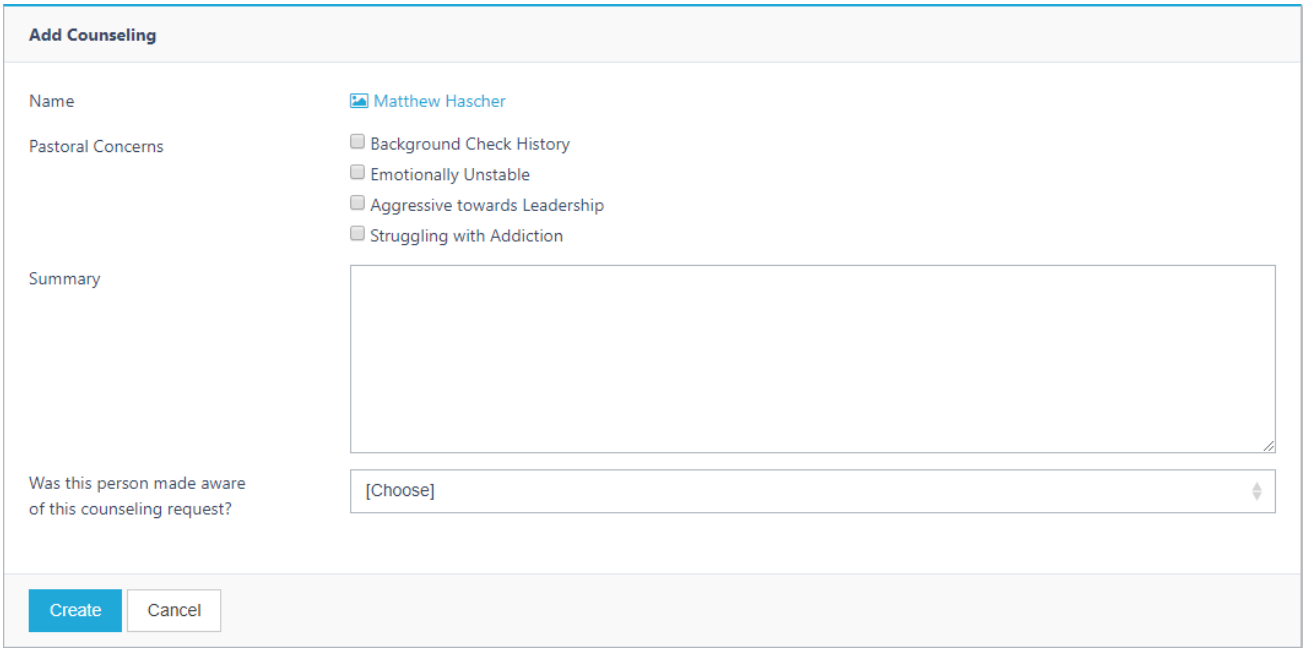
2. Click the **Add New Counsel** icon.



3. Select **Pastoral Concerns**. See your Arena Administrator to customize these options.

4. Enter **Summary**.

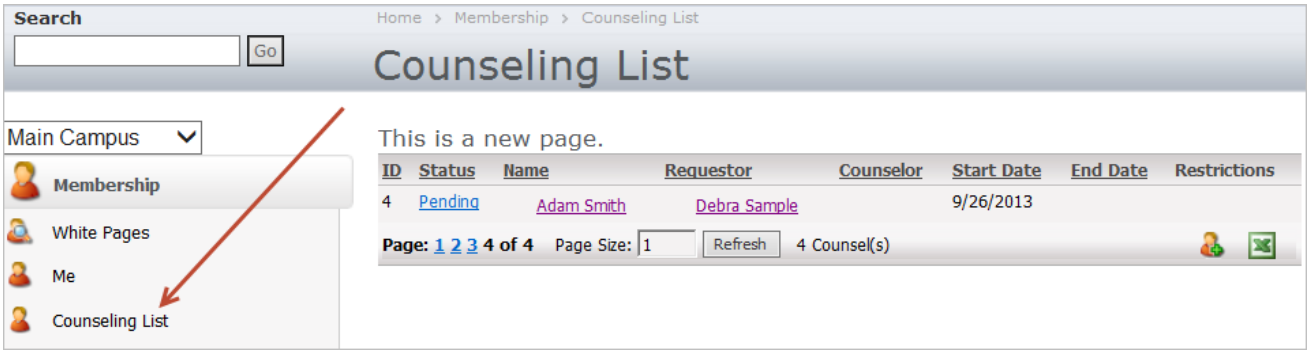
5. Select if the person is aware of the counseling request.



6. Click the **Create** button. If the Counseling|Request System Email is configured, Arena sends an email to the requestor and recipients in the CC and BCC fields of the systems email.

Process a Counseling Note

1. Click the **Counseling** tab on the **Person Detail** page or from the **Membership** menu click the **Counseling** option.



2. Click the ***Status*** link for the counseling note.

3. Click the ***Edit*** link for any section.

Person Detail

Individual Information | Security | Person Viewed | Contributions | Prayer Requests | Counseling

Name Scott Clem [R]
Start Date 8/11/2011
End Date 8/11/2011

Private Case Notes — Edit

Facts — Add Fact

- 8/11/2011 by Marie Sample at 8/11/2011 1:17:40 PM
  Person is aware counseling request was submitted.

Observations — Add Observation

Documents — Add Document

Name	Date Created	Type
There are no results to display.		

Restrictions — Edit

Restrictions **Pastoral Concerns**

Status Information — Edit

Requestor Marie Sample
Counselor
Summary
Status Standard

Return to List...

Name Scott Clem [R]
Status Standard
Summary
Restrictions
Pastoral Concerns
Counselor
Requestor Marie Sample

Return to List...

4. Enter details for each applicable field. See your Arena Administrator regarding Restrictions and Pastoral Concerns options.

Private Case Notes

Facts

Fact Date

Fact

Observations

Observation Date

Observation

Restrictions

Restrictions

- All campus events
- Membership
- Doesn't work well with children, please explain
- Other

Pastoral Concerns

- Prideful
- Divisive
- gender biased

5. Assign the **Counselor** and change the **Status**, as desired.

Status Information

Requestor Linda Johnson

Counselor

Summary

Status In Process

Create Request | Cancel

- **Requester**: This is the current user. You cannot change the contact person.
- **Counselor**: Select a counselor for this counseling note.
- **Status**: Select a status for this counseling note.

6. Click the **Create Request** button to return to the **Counseling** tab.

7. Click the **Save** button. If the Counseling|Request System Email is configured, Arena sends an email to the Requestor and recipients in the CC and BCC fields of the systems email.

Active Campaigns

The **Active Campaigns** page displays all current campaigns. Click the ***Campaign*** link to open a new window with the next family to contact. See your Arena Administrator if there are no campaigns.

Before you begin to use this feature, review the below customization options:

The Campaign Family Status Lookup determines the options (buttons) available in the Calling Campaign. The “Include” qualifier determines the number of calls for the specific category prior to the call being marked complete.

Review Campaign New Family module where you can set to allow for Group Registration and which Group Cluster Type, and if to make available Assignment Workflow.

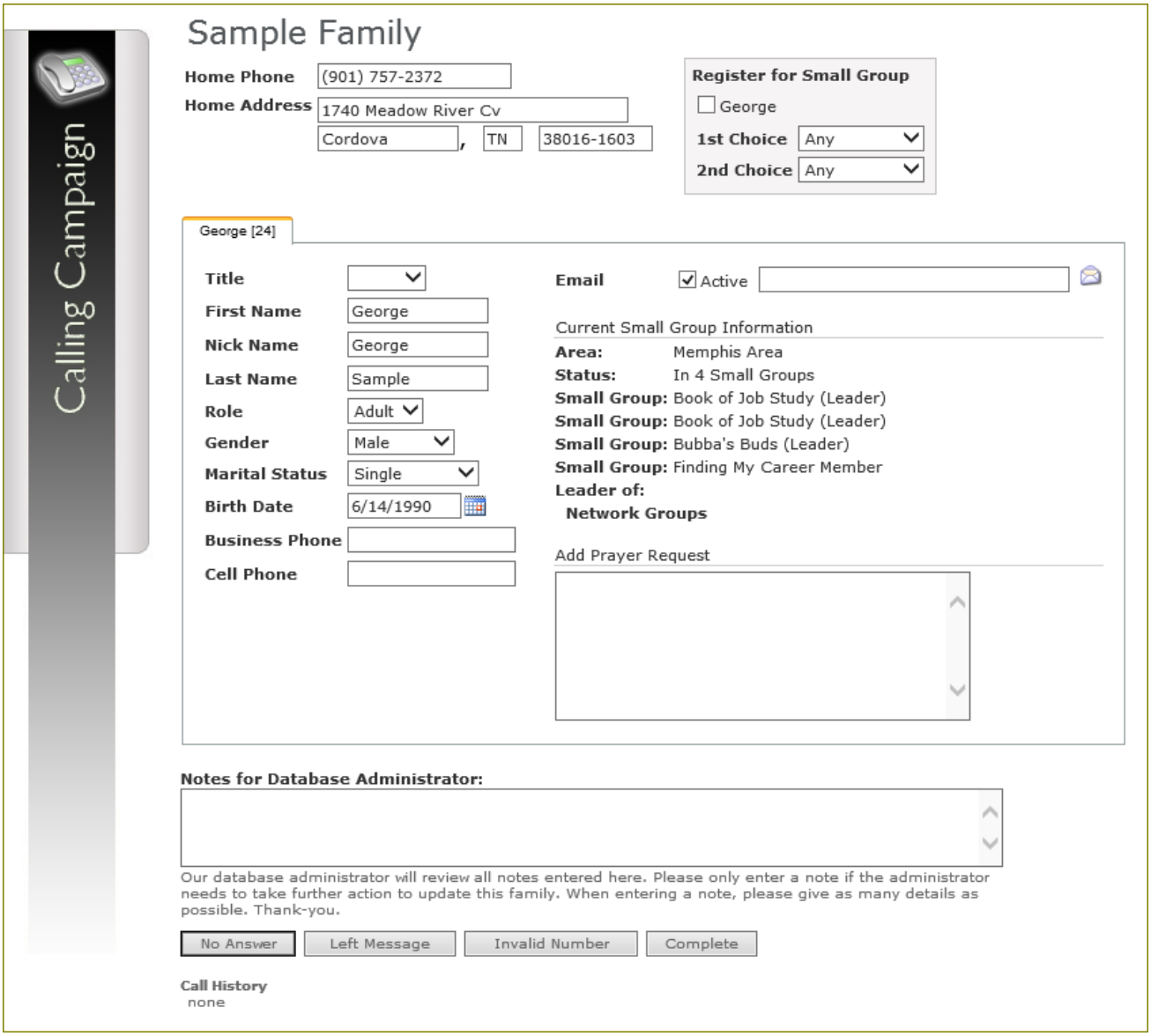
Create campaigns on the **Administration** menu and the **Campaign Administration** option.

Review the Campaign Next Family module and customize as needed.

Review the Campaign Family Status lookup and customize as needed. This lookup determines the call options and how many times a user can select the same result before the family is "Complete."

Each tab represents a family member, listed by age. On this page, you can update the personal information of each family member, register someone for a small group, add an individual prayer request, initiate an assignment workflow, add campaign notes, email an individual, and select the result of the call.

Different callers can simultaneously access the same calling campaign. Arena displays the next person to call for each caller. The same family does not display for more than one caller. Once a family displays, they do not display again in the same campaign for one day, regardless of the result, and even if you close the campaign window without selecting a result (unless the result completes the campaign for that family, in which case the family does not show again in the campaign at all).

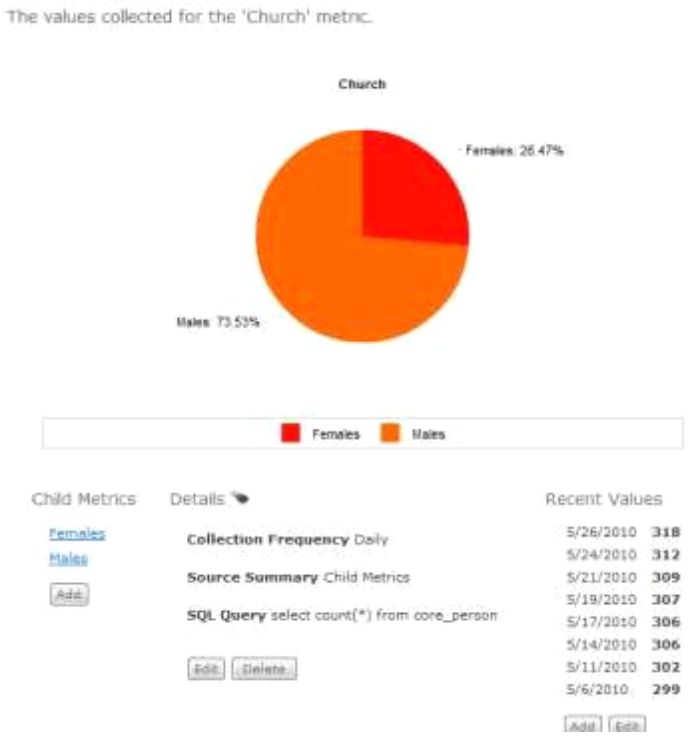


The below screen displays once the caller has gone through all the families in the campaign. If you have no contact with anyone in the campaign, after one hour, those families display again and the volunteer can attempt to reach the family again.

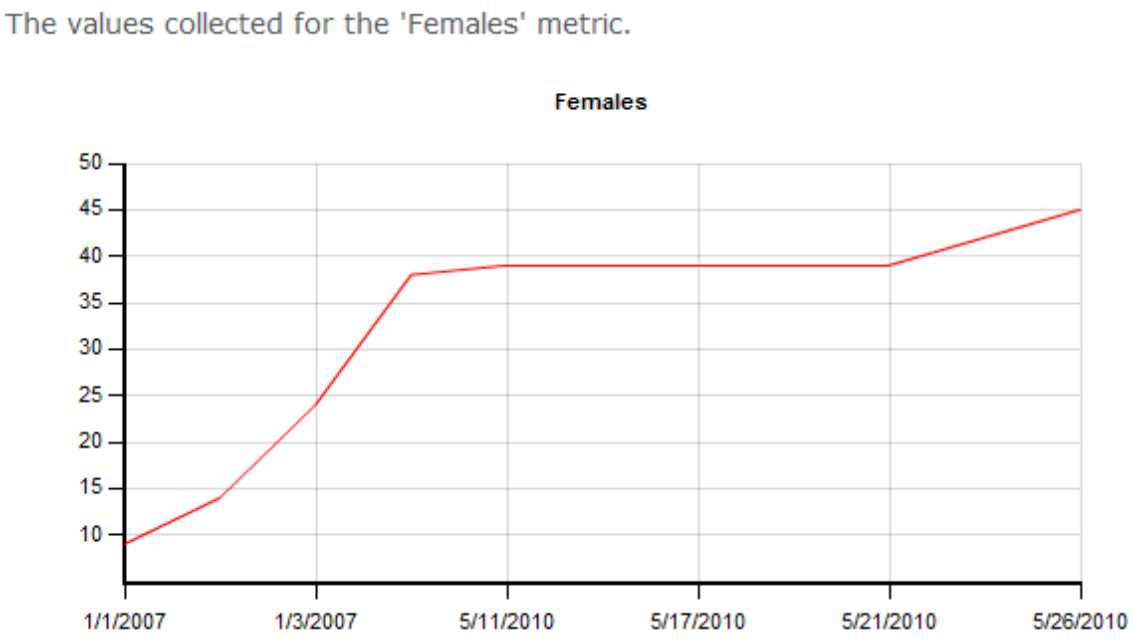
Metrics

Use Arena Metrics to track and chart a variety of statistical data. You can manually enter the metric data or use a SQL query to generate data automatically. Use Child Metrics to organize different metric charts and display metrics in either an area, pie chart, multi-line, area stacked, or line chart format.

Pie Chart Metric



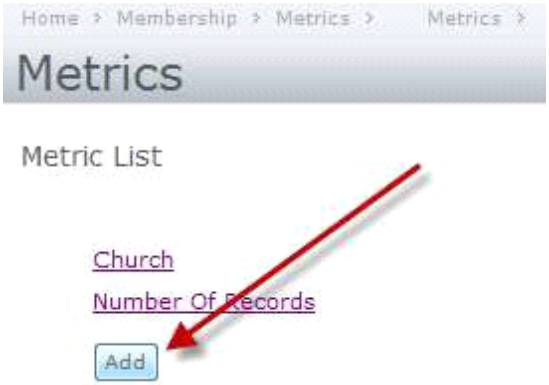
Line Metric



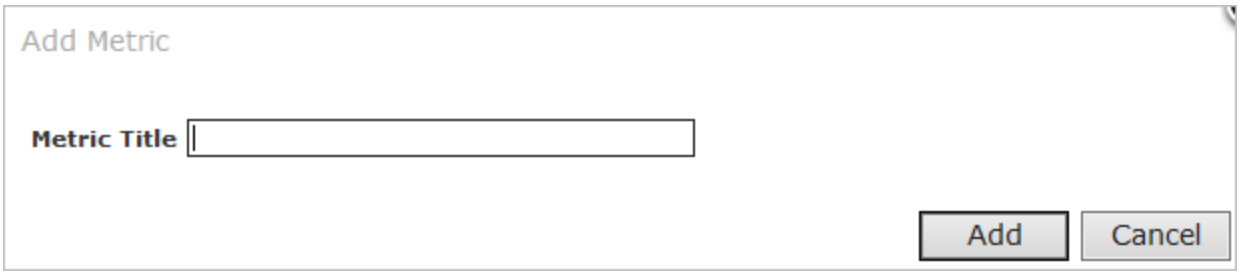
Add a Metric

1. From the **Membership** menu, click the **Metrics** option.

2. Click the **Add** button.

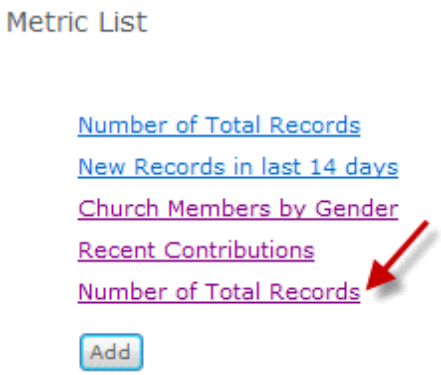


3. Enter a **Title** for this metric.



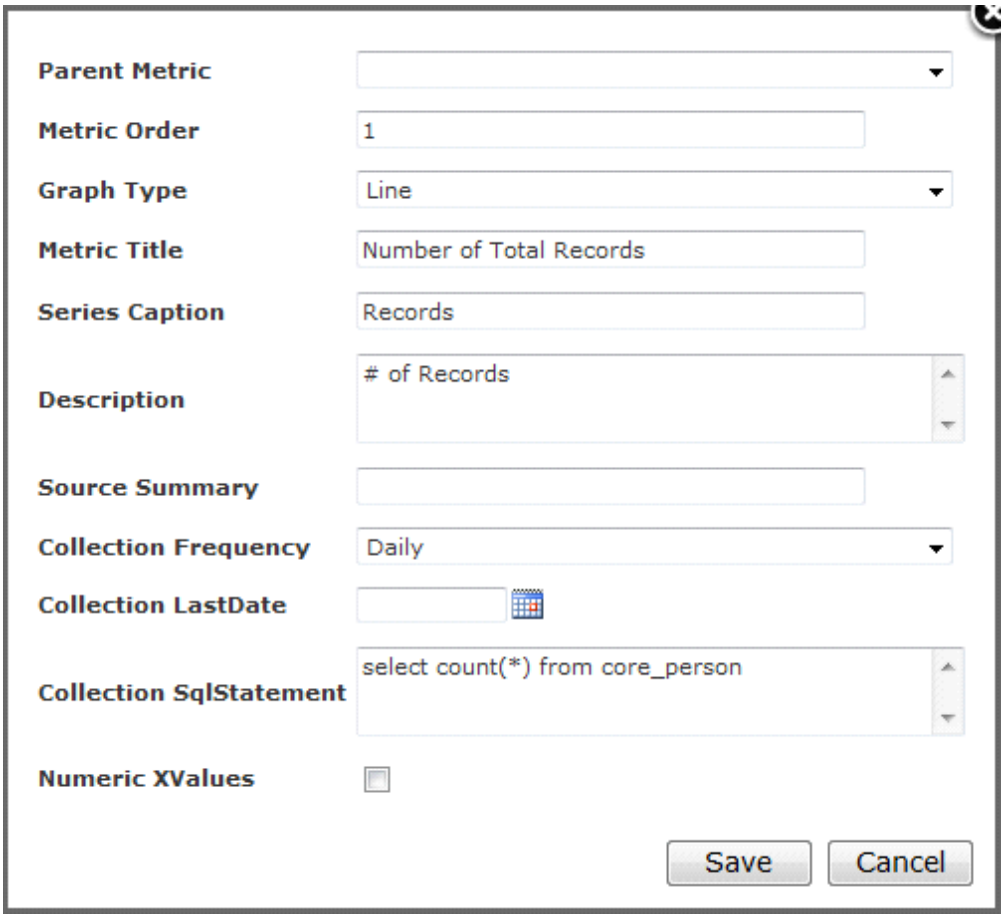
4. Click the **Add** button.

5. Select the Metric from the list.



6. Click the **Edit** button.

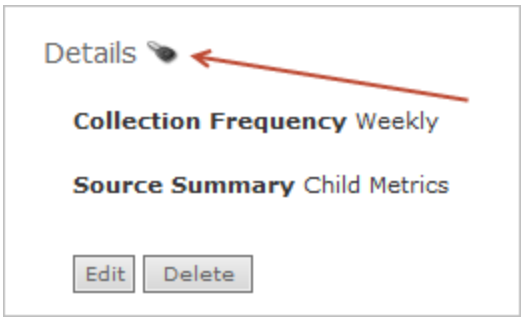
7. Enter the required and desired fields.



- **Parent Metric** – Select the parent metric if this is a child metric.
- **Metric Order** – Enter 1 if not using child metrics.
- **Graph Type** – Select graph type.
- **Metric Title** – Enter a title for this metric to display above the graph.
- **Series Caption** – Enter a caption for this metric to display below the graph.
- **Description** – Enter a description to display above the graph.

- **Source Summary** – Enter a source summary for this metric.
- **Collection Frequency** – Select the frequency the data should be collected.
- **Collect Last Date** – This is the last date data was collected.
- **Collection SQL Statement** – Enter the SQL statement for this metric.
- **Numeric XValues** – Check this box if you would like to display the X-axis values for this metric.

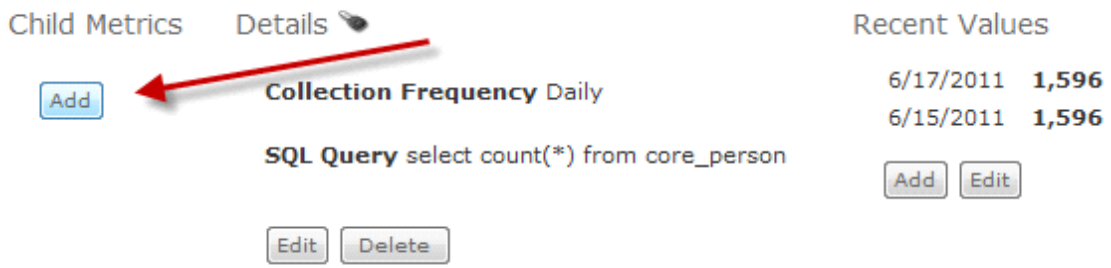
8. Click the **Save** button.
9. Click the **Security** icon to set security for this metric.



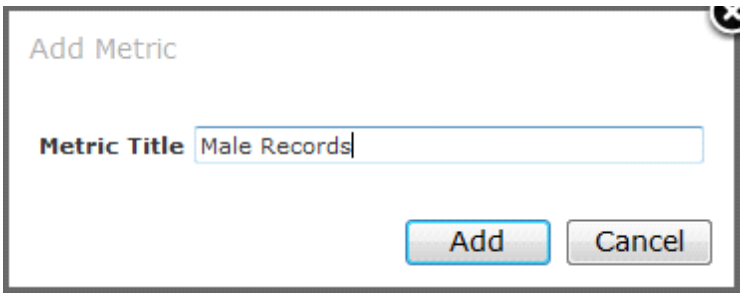
Add a Child Metric

Select the Metric to which you would like to add a child metric.

1. Click the **Add** button.

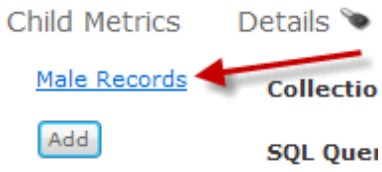


2. Enter a **Title** for this Child Metric.



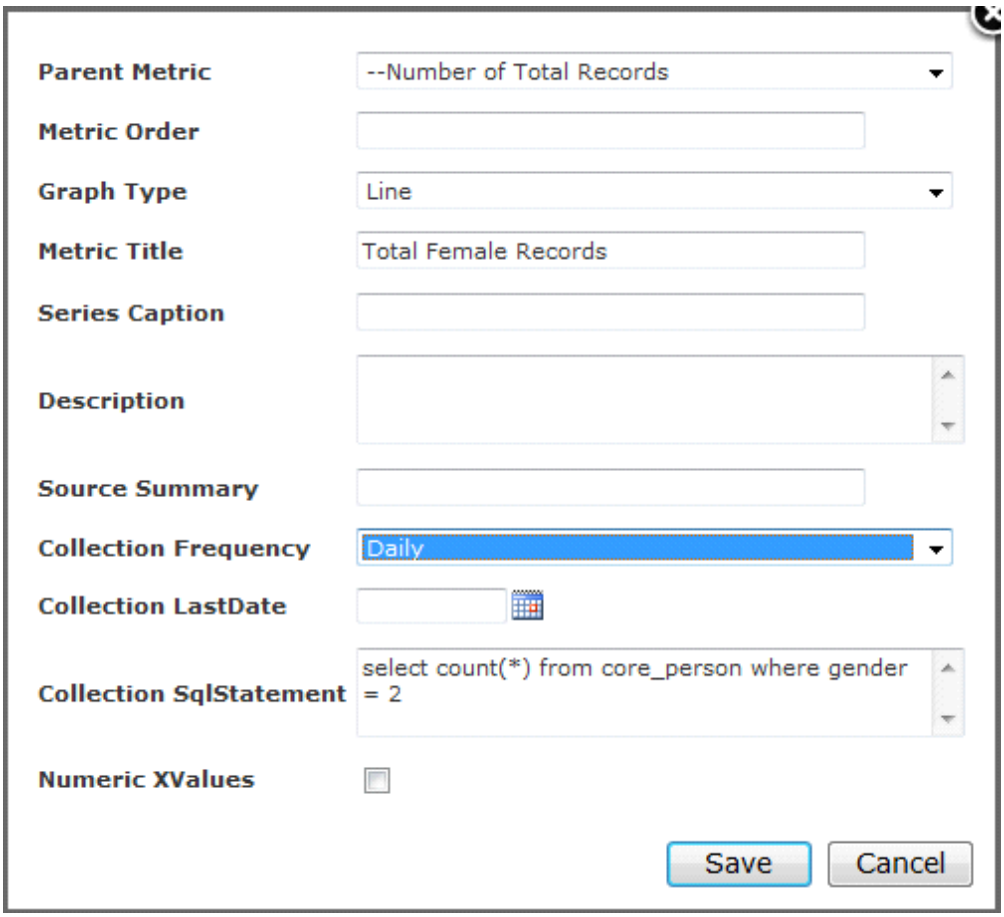
3. Click the **Add** button.

4. Click the ***Child Metric*** link.



5. Click the **Edit** button.

6. Enter the appropriate fields, including the SQL statement for this metric.



7. Click the **Save** button.

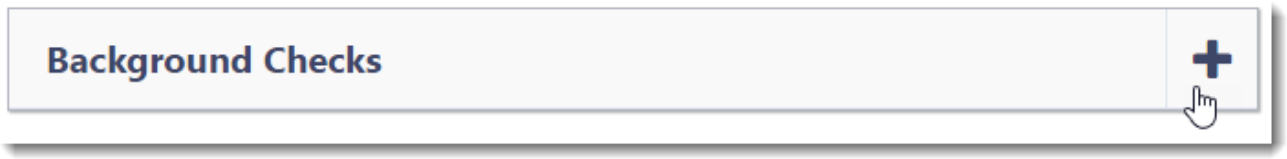
New Background Check (Optional)

Arena integrates with Protect My Ministry. Use the following steps if your organization uses Protect My Ministry for background checks.

Request a Basic Background Check Using Protect My Ministry

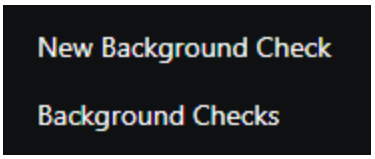
From the **Membership** menu, click the **New Background Check** option or **Request New Background Check** on the **Person Detail** page to open the page to request a background check.

Background Check Request from Person Detail Page

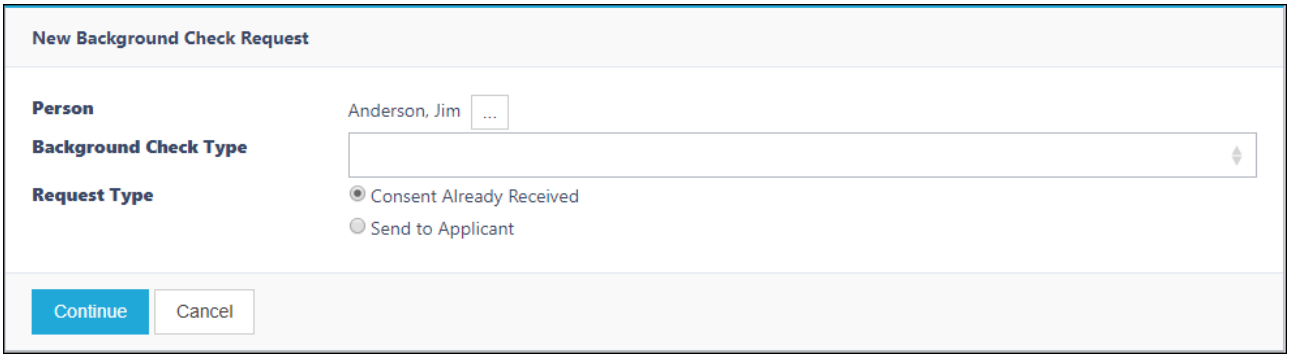


Background Check Request from the Navigation menu

1. From the Navigation menu, select the **New Background Check** option.



2. Search and select an existing record.



3. Select the **Background Check Type**. The default type options are Basic and Plus. (Consult your Arena Administrator regarding additional options.)

4. Select the **Request Type**: **Consent Already Received**, or **Send to Applicant**

5. Complete applicable fields on the background check request page and click **Submit**.

Membership / New Background Check

New Background Check

Background Check Request Entry

Background Check Information

Changes to person fields will update the person record!

Person	Reuben Stanley
First Name	Reuben
Middle Name	☑ No Middle Name
Last Name	Stanley
Social Security Number	111-11-1111
Gender	Male
Birthdate	1/1/1980
Residence	123 Main
City State Zip	Manatee FL 34201
Email	josh.flippen@shelbyinc.com
Background Check Type	Protect My Ministry - Basic
Alias or Maiden Name (First/Middle/Last)	AKA. Additional Charges May Apply
Position	
Reference Code	Invoices will be subtotaled by this code
Other Information	
Send Copy To Applicant	☐
PIN	
Rush Process	☐
Consent Form is on file	☐

National Criminal Database Search

No additional information required

National Sex Offender Registry

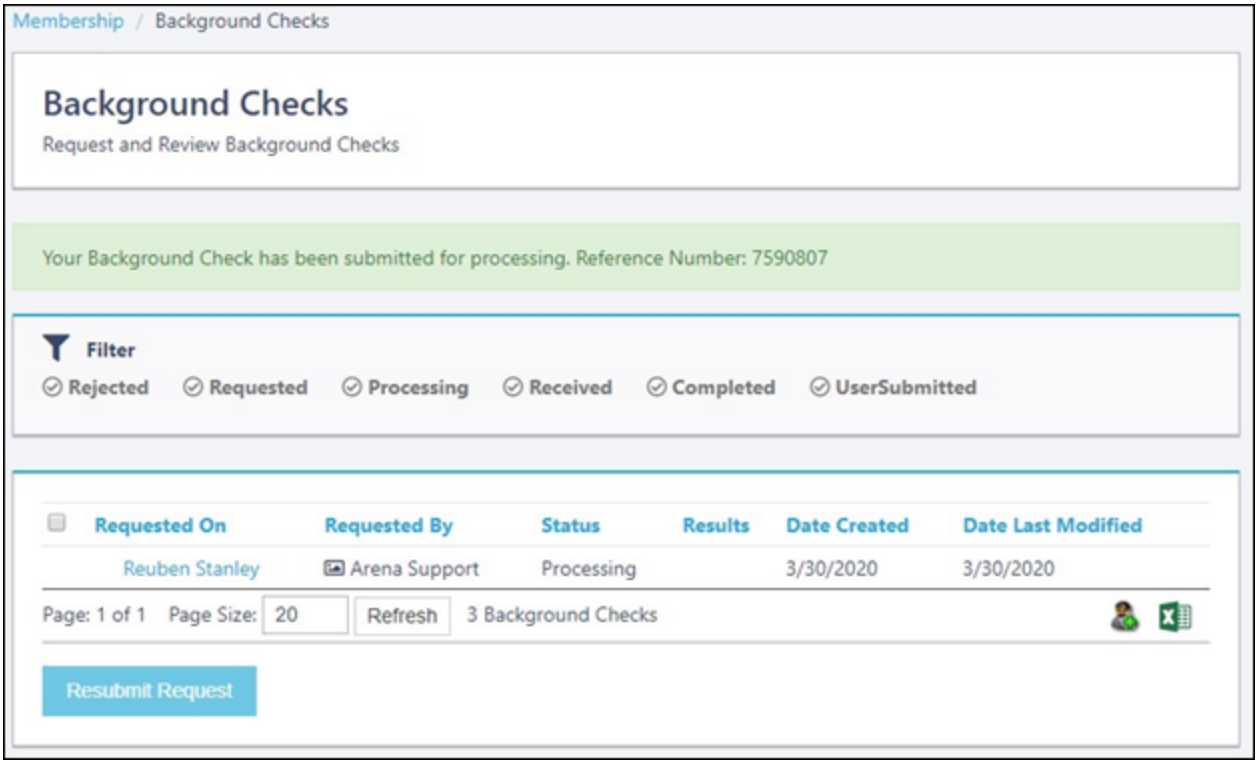
No additional information required

SSN Verification & Address History

No additional information required

Submit Cancel Background Check List

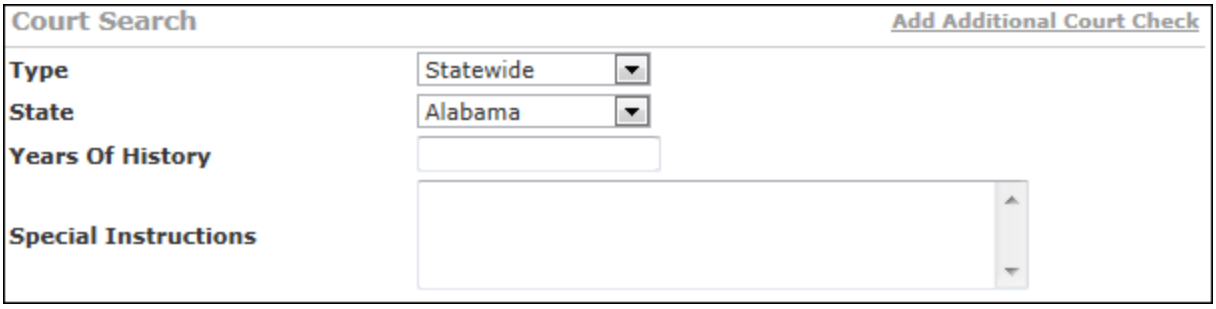
6. The following message displays. See Background Checks > System Emails to configure Emails if needed.



Plus Background Check by County/State

- **Add Additional Court Check**: Click this link to add additional court searches.
- **Type**: Select the county.
- **County**: Select the county.
- **State**: Select the state.
- **Years of History**: Enter the years of history to check.
- **Special Instructions**: Enter any special instructions.

Plus Background Check by State



- **Type**: Select the statewide.
- **State**: Select the state.
- **Years of History**: Enter the years of history to check.
- **Special Instructions**: Enter any special instructions.

NOTE: Under Module Settings for this page, you can link the date of this approved background check to a person attribute field.

Background Check

Review and manage submitted background checks.

From the **Membership** menu, click the **Background Checks** option to research the status of a background check.

This Section Includes:

Review Background Checks

- Filters
- Background Check Information

Process Background Check Requests

Resubmit a Background Check

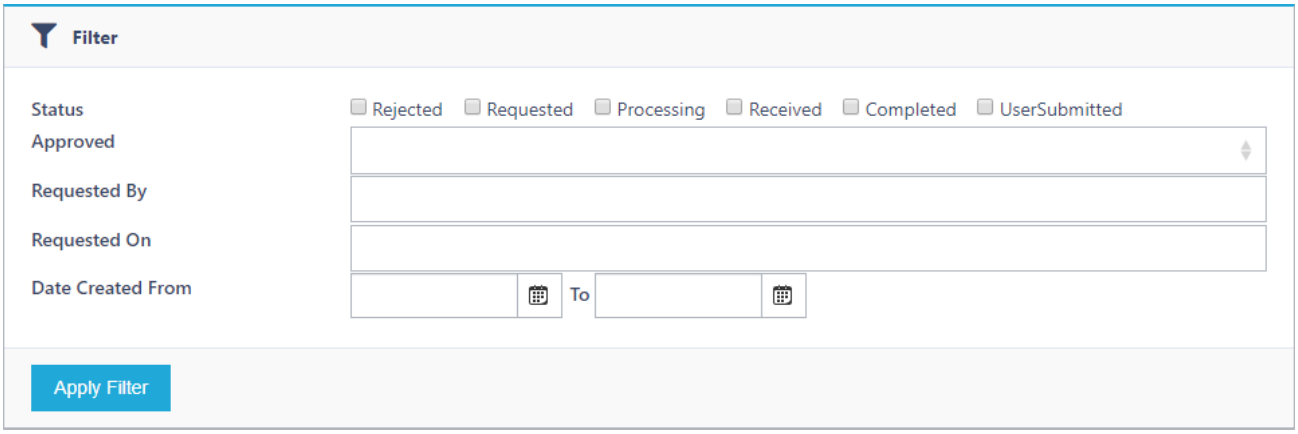
Approve/Reject Background Checks

Page Update

Review Background Checks

Filters

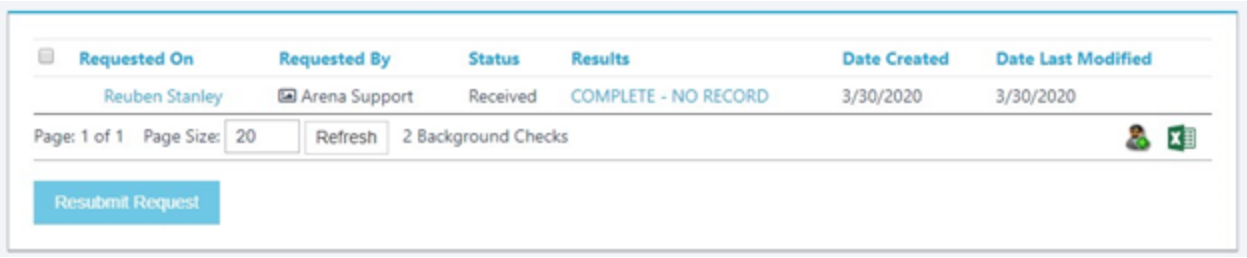
Apply the filters to view the desired background check results.



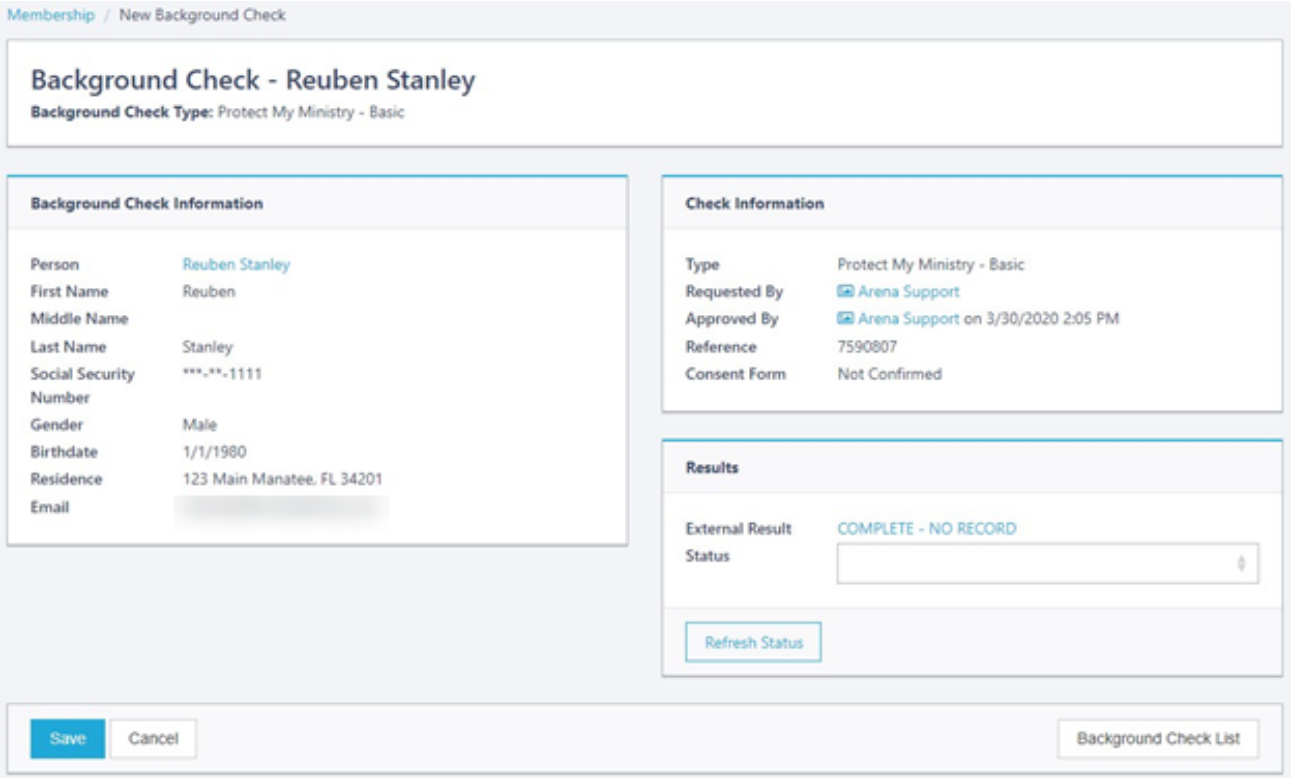
1. Select the desired **Status**: You can filter a single or multiple background check status.
   - **Rejected**: This status applies to rejected background check requests.
   - **Requested**: This status applies to background check requests that need approval or rejection.
   - **Processing**: This status applies to background checks the provider is processing.
   - **Received**: This status applies to background checks that have a report ready to review.
   - **Completed**: This status applies to completed background checks.
   - **UserSubmitted**: This includes those background sent to and submitted by applicants.
2. **Approved**: You can filter by approved (Yes) or not approved (No) background checks.
3. **Requested By**: You can filter by the background check requester.
4. **Requested On**: You can filter by the background check applicant.
5. **Date Created From**: Enter the first date in the date range of background checks you are searching for.
6. **Date Created To**: Enter the last date in the date range of background checks you are searching for.
7. Click **Apply Filter** to continue.

Background Check Information

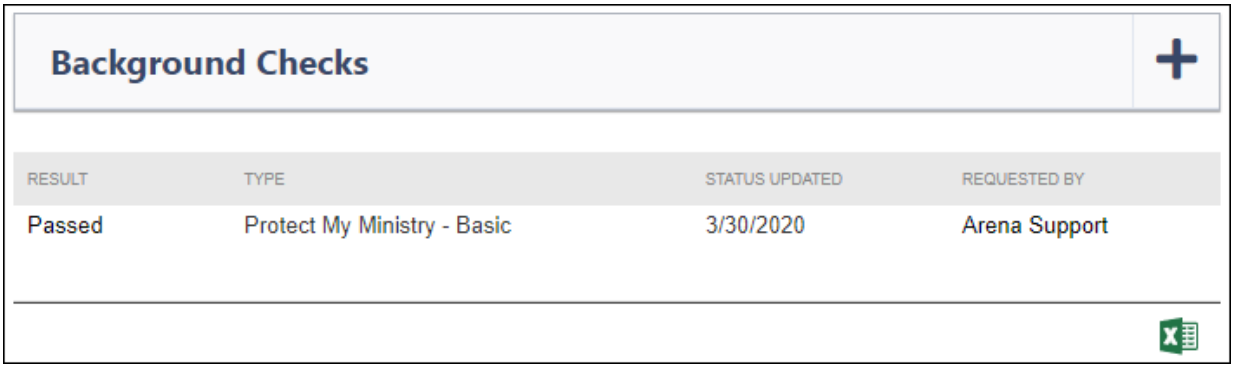
1. Click a persons name to view the Background Check Information.



2. Click the **Save** button.



NOTE: The results are also available on the Person Detail page of the individual, which displays a background check status, the type of background check, the date of the background check and a name link of the requester. The Result could also indicate Failed.



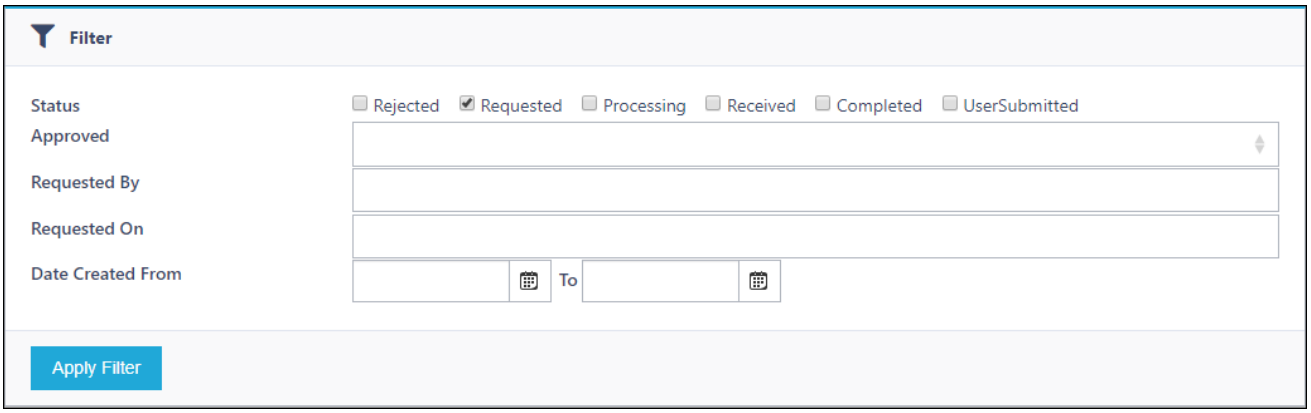
- **Processing**: This status means that the background check has been submitted.

- **Received**: This status means that the search has been reviewed and the results returned.
- **Passed**: This status means the individual has passed the background check process. This status is only available on the **Person Detail** page.
- **Completed**: This status means that the background check has been passed and only displays on the **Background Checks results** page.

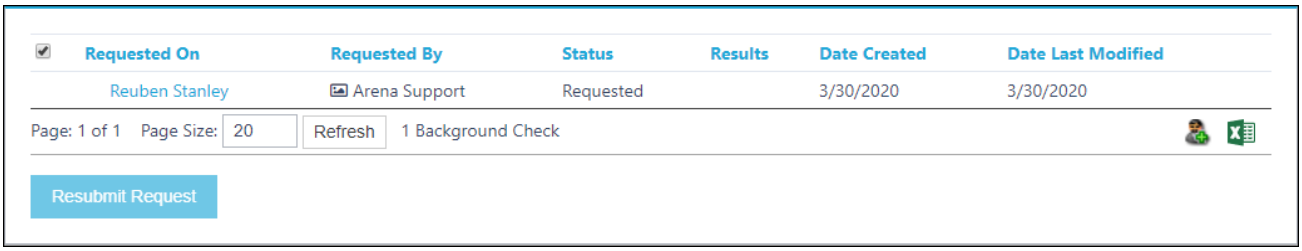
Process Background Check Requests

If your organization has security permissions set so that all background check requests require approval prior to processing, the person responsible for approving must either approve or reject the request. Once the background check request is approved, Arena emails the requester with an update to the person's request.

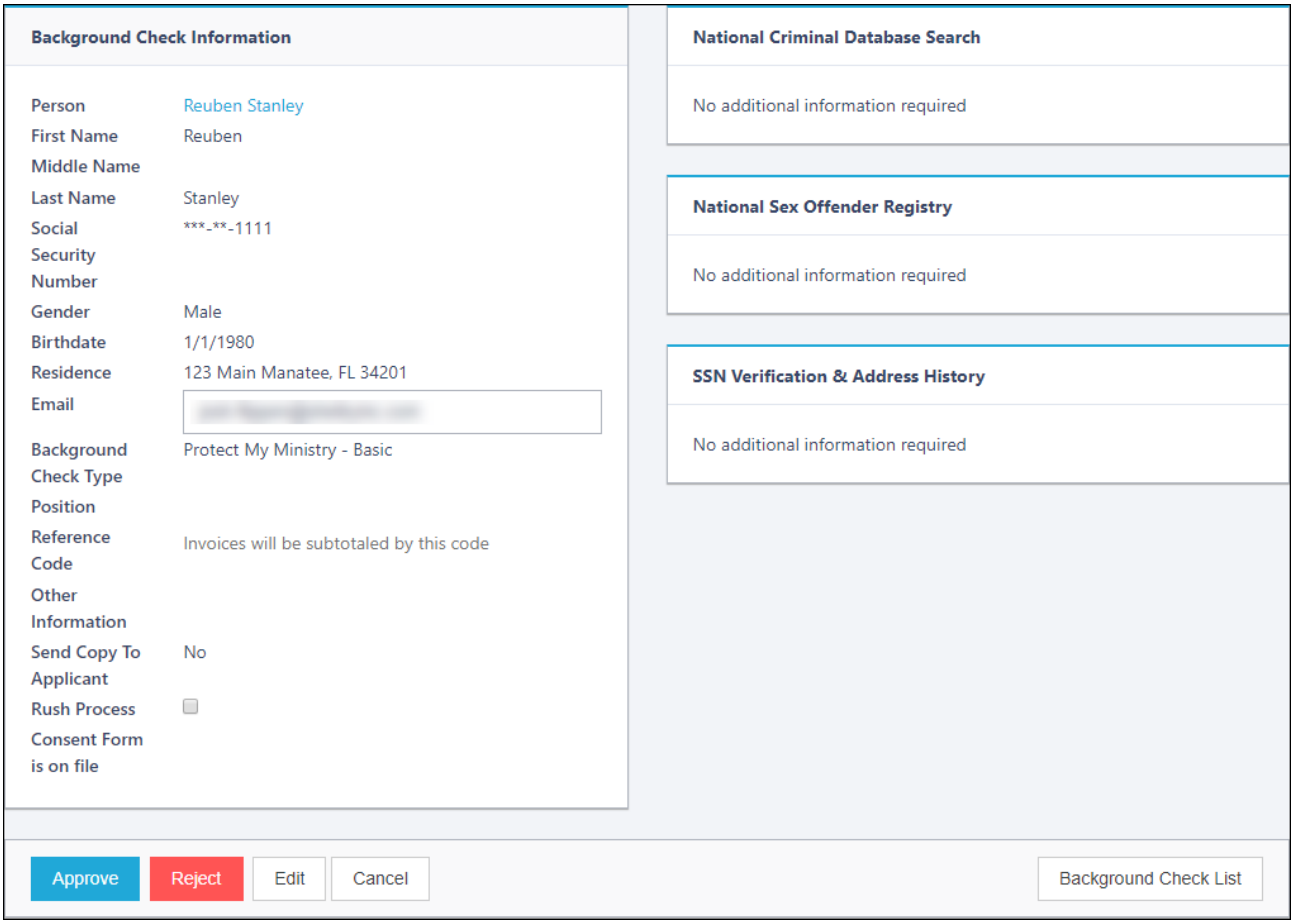
1. From the **Membership** menu, click the **Background Checks** option.
2. Select **Status** filter "**Requested**".



3. Click **Appl**y.
4. Click the ***Name*** link for whom a background check is requested to open and review the request.



5. **Approve**, **Reject** or **Edit** as needed. Users with approval permissions can edit all fields.

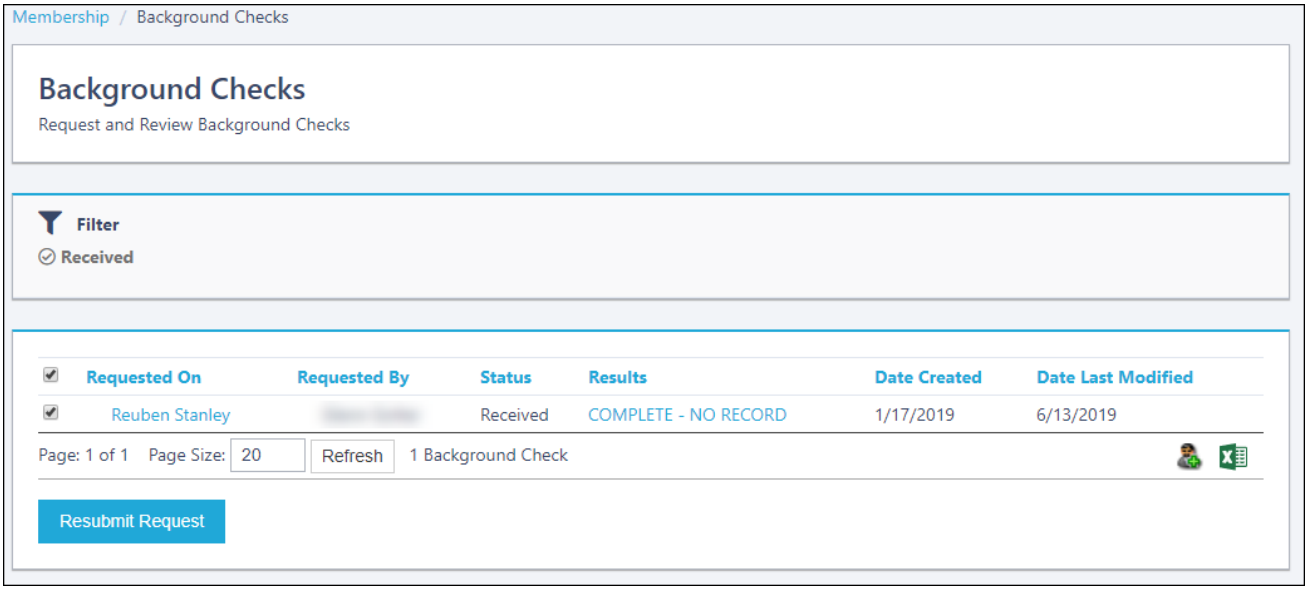


6. Once the request is approved, Arena sends the background check request to the provider to be processed.

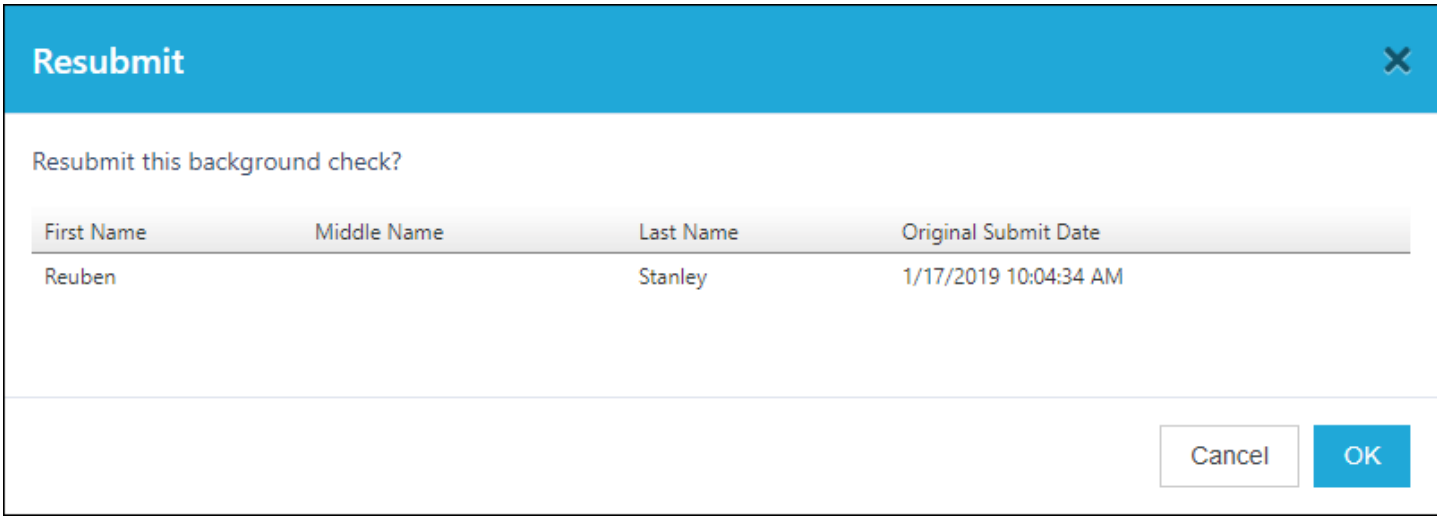
Resubmit a Background Check

You can also "Resubmit" a background check. This is done when an existing background check has passed X months (default is 24 months) on the "module setting on the Background Check List page". At which point, a check box will appear next to the Requested On name. User can check the box(es).

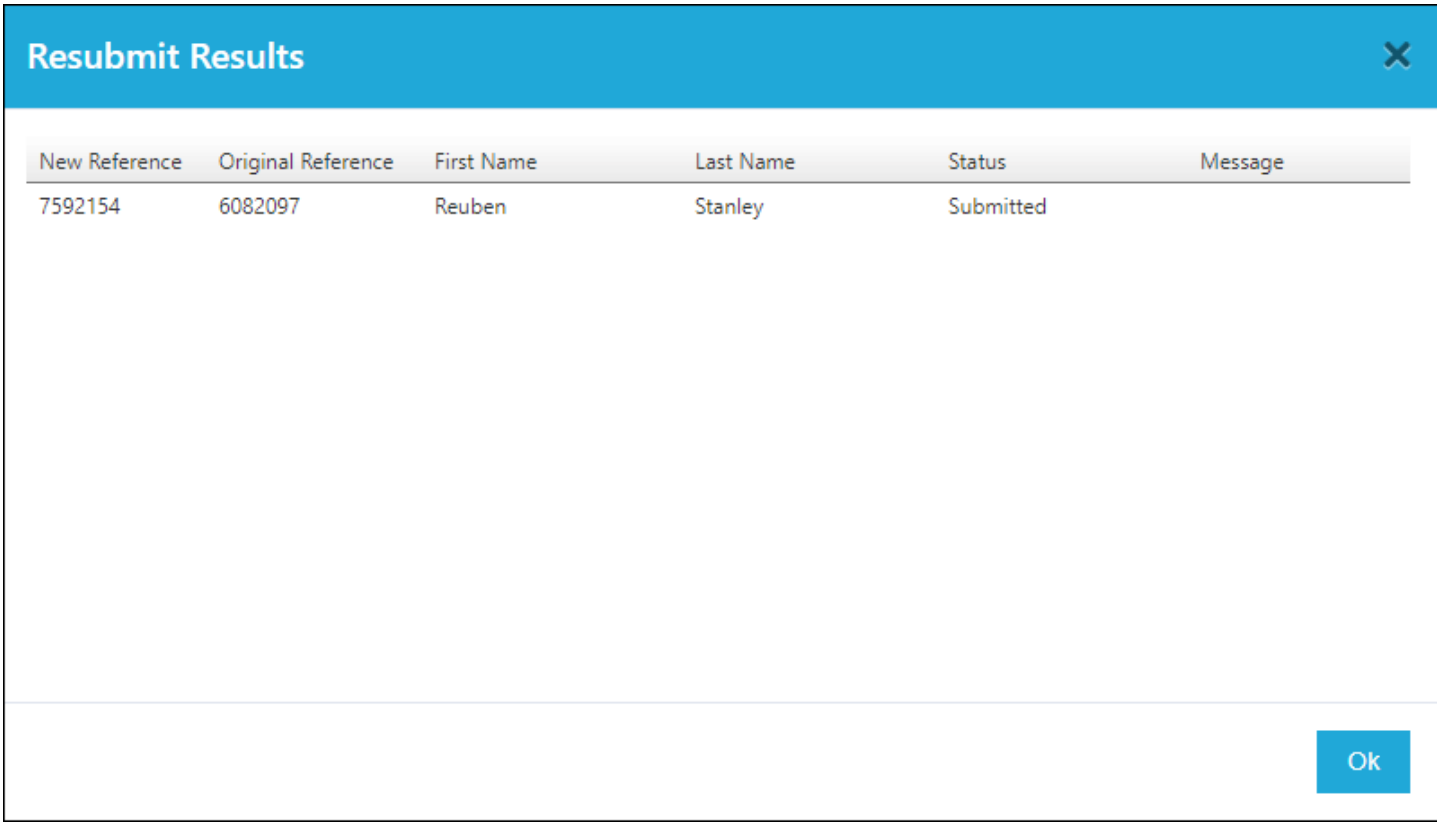
1. Click **Resubmit Request**. It will automatically send a new request to PMM/SSF to process without having to reenter any information.



2. Click **OK** to resubmit this background check.

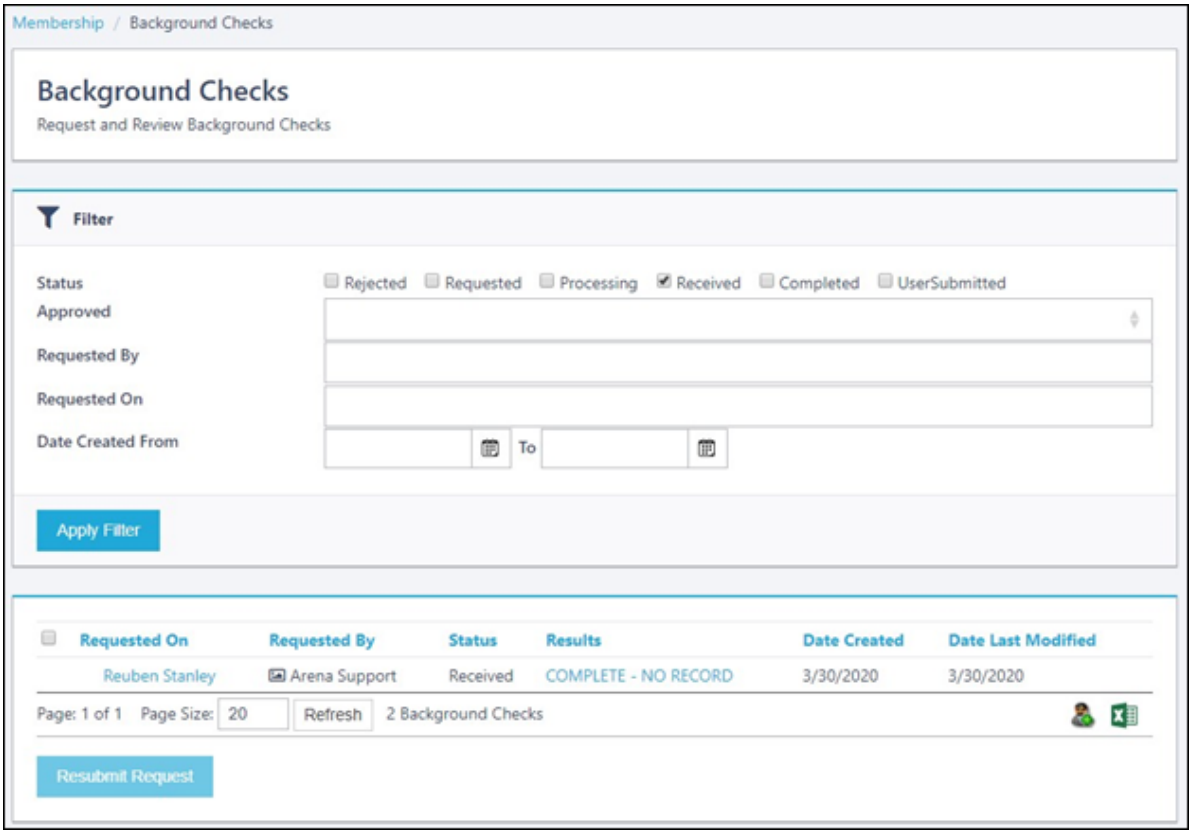


3. Click **OK** on the resubmit Results screen.

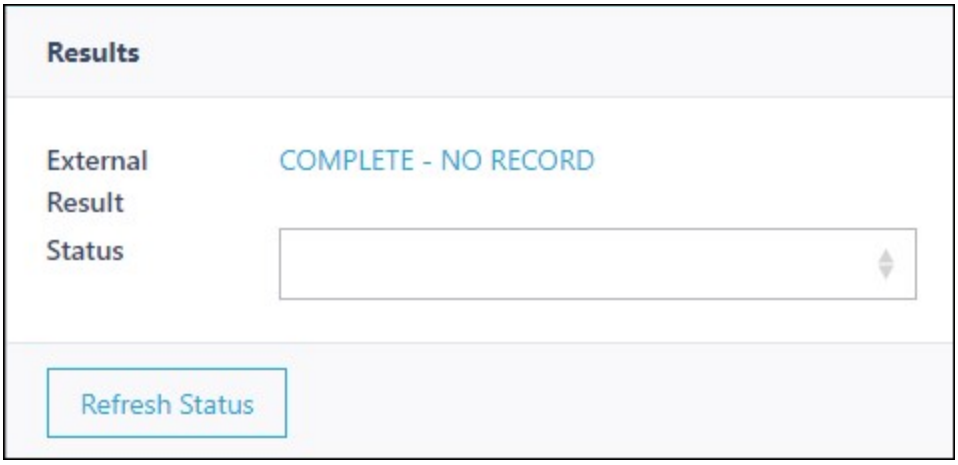


Approve/Reject Background Checks

1. To view the Background Check report, click the ***Requested On*** link. The status must be "Received."

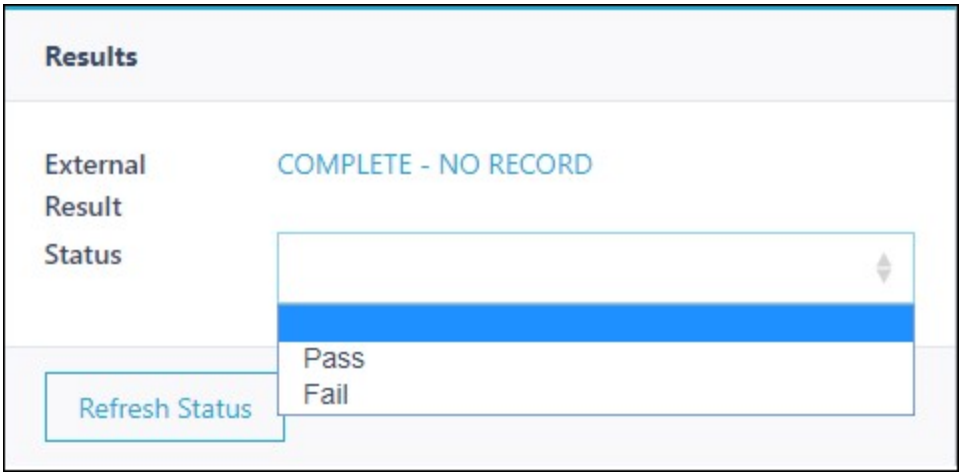


2. Click the ***External Results*** link to view the report. This is a link to the report located on the provider's secured servers. Once the report displays, you can also save it on a local location.



3. View the Report.

4. Select "Pass" or "Fail" for the **Result**.

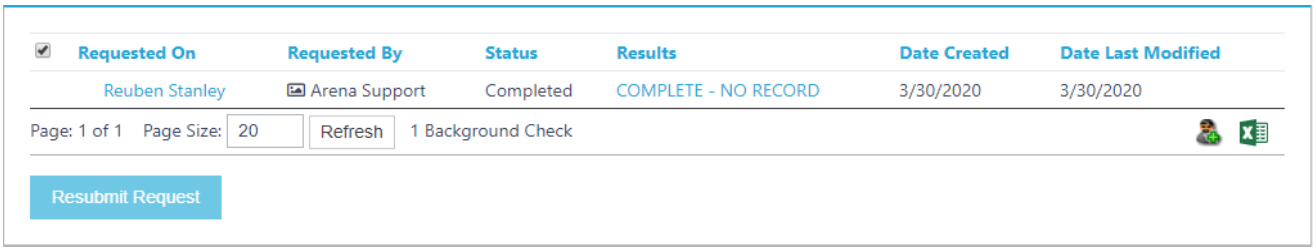


5. Once you select "Pass" or "Fail", the below page displays, the status changes to "Completed", the record updates with the Result of Passed or Failed, and an email is sent to the requestor with an update to this request.

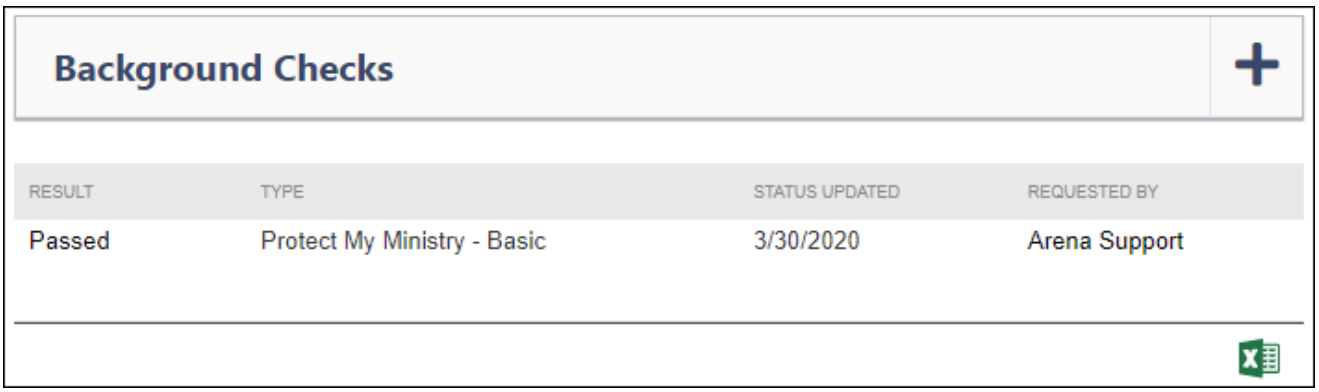
Page Update

The Background Check has been Updates.

Background Check View

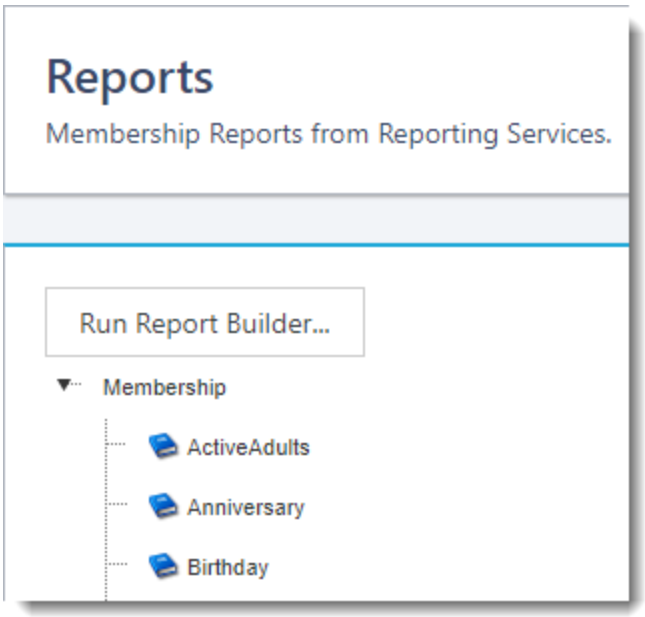


Person Detail Page View



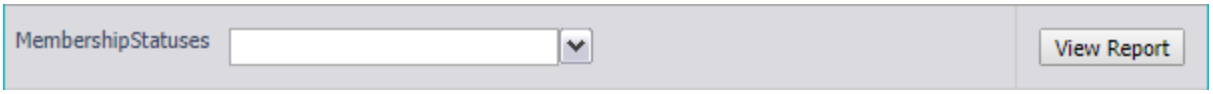
Reports

Several reports are preloaded in Arena. Following is a list of the pre-loaded Membership Reports. These Reports are created using Microsoft Reporting Services. Most reports have **Parameters** that act as filters. The next sections list some of the preloaded Membership reports, a brief description, and the available parameters. Microsoft Report Viewer is required.



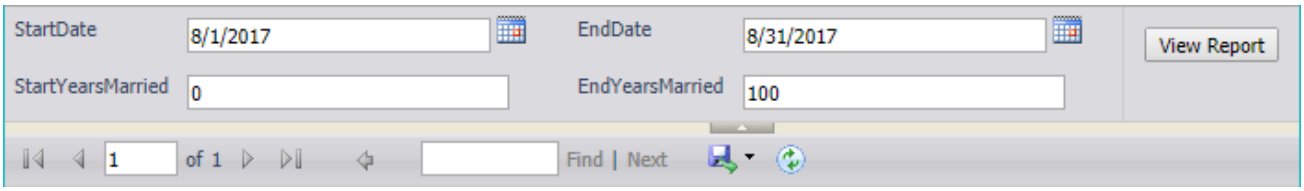
Active Adults

The Active Adult report displays all adults based upon membership status. (Options may vary for your organization.)



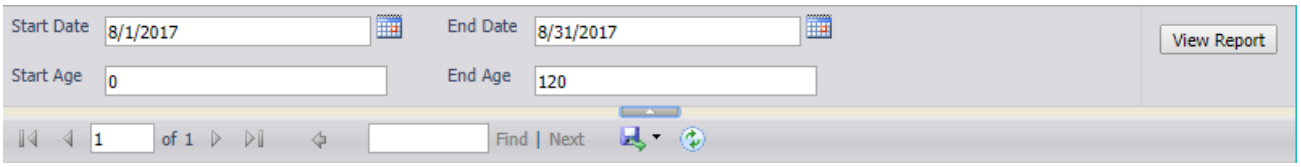
Anniversary

These parameters return records limited by the wedding anniversary date and the number of years the couple has been married. Years married calculates from the wedding anniversary date and the system date on your server. (Enter the date in **MMDDYY** or **MMDDYYYY** format or click the **Calendar** icon to select the Start and End dates.)



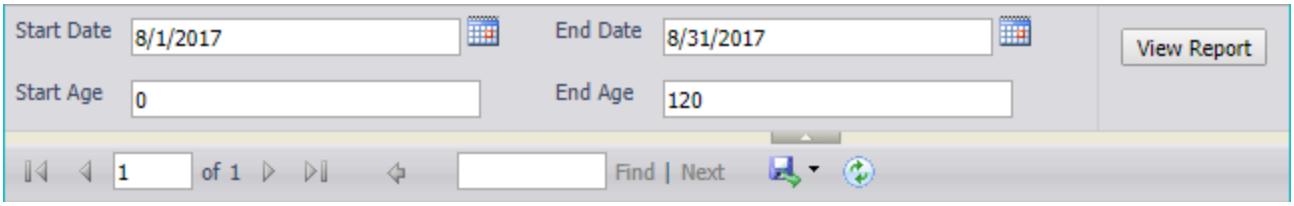
Birthday

These parameters return records limited by date of birth. The start and end dates limit the results by age of the person. A person's age calculates by using the birthdate field and the system date on your server.



First Time Visitors

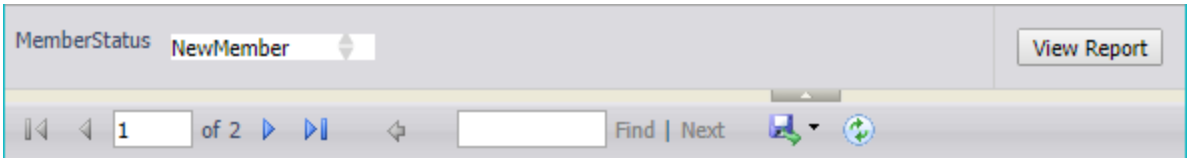
First time visitors are those records with a date in the First Visit field in the Visit Dates listed on the **Person Detail** page. Use the parameters to limit the date range for the report.



Head of Household

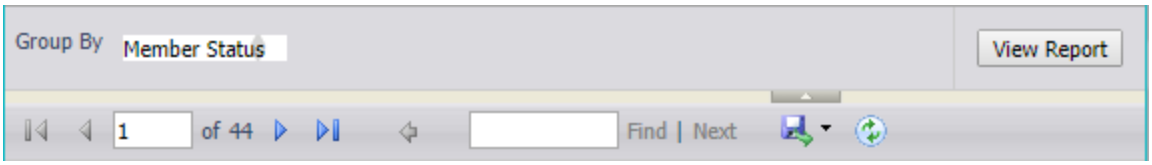
This report displays the Head of Household records as they pertain to a selected Member Status. Arena determines head of household by the oldest adult male in a family. If an adult male is not

present, the oldest adult female is the head of household.



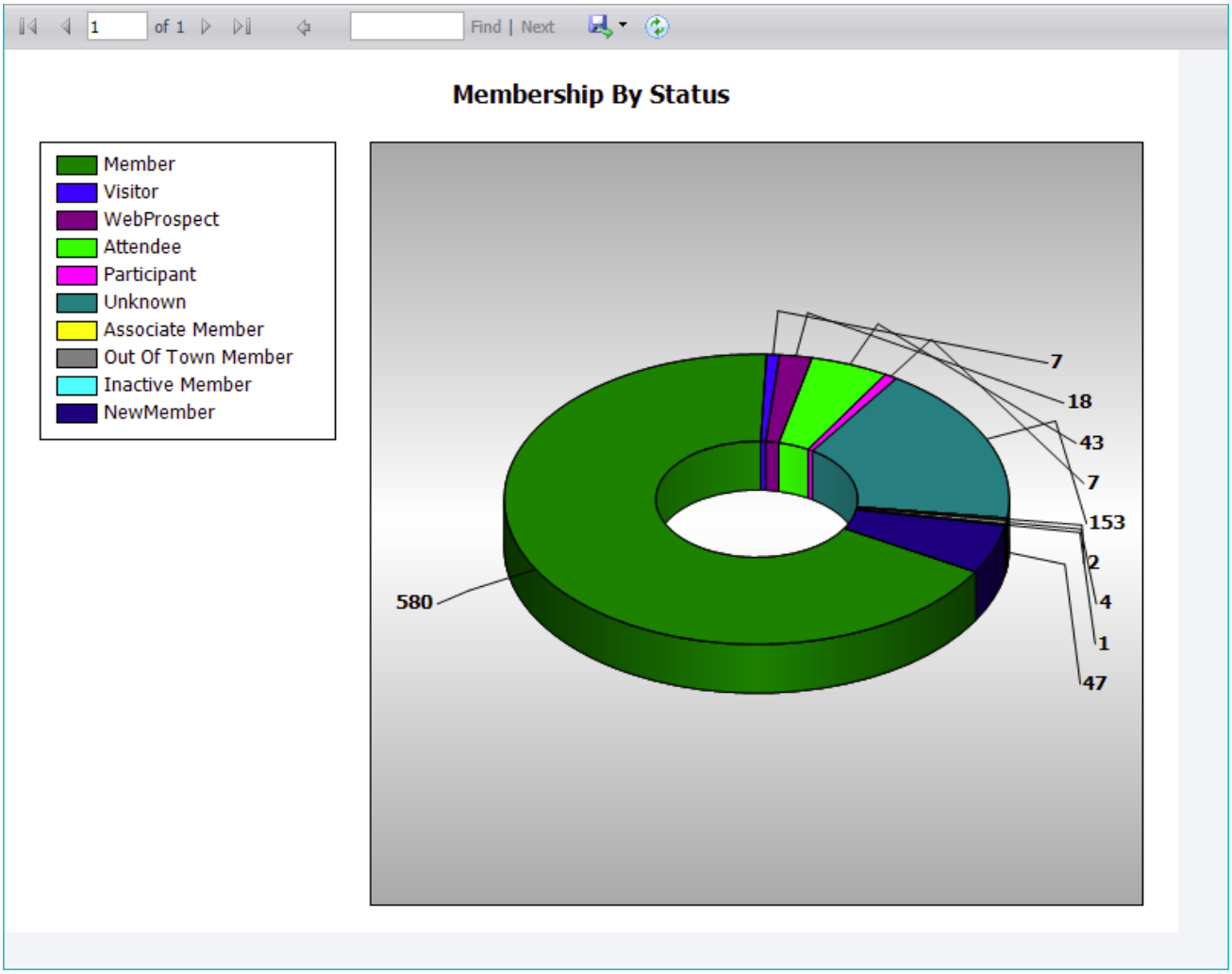
Members

This report enables you to group records by member status, record status, city or state.



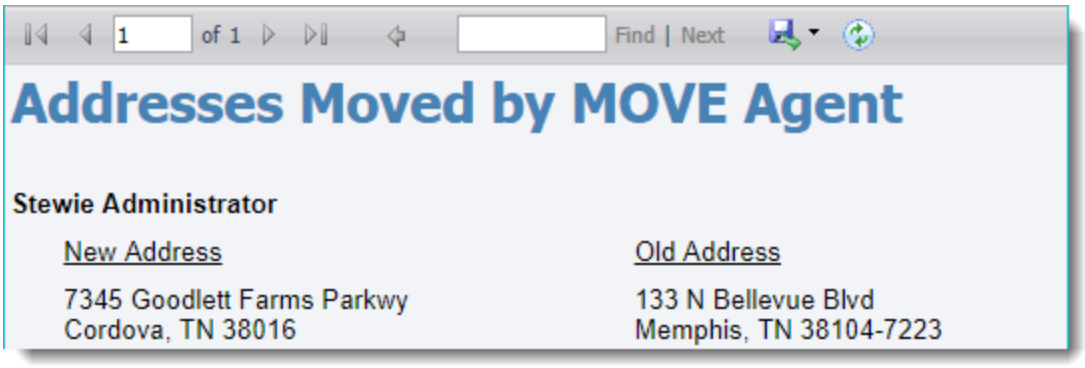
Membership Chart by Status

This report displays all active records by member status in pie graph.



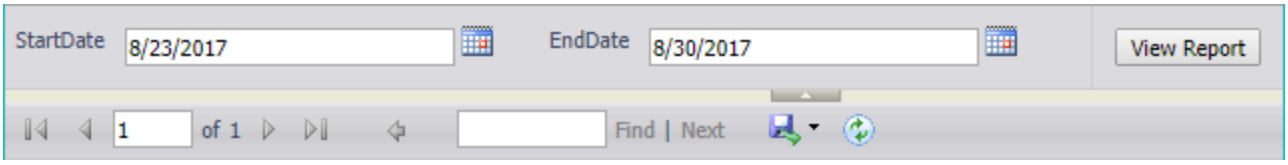
NCOA Moved Addresses (Optional)

This report displays all records identified by the MOVE Agent. There are no parameters for this report.



New Members

This report identifies new records based on the date entered. Use the Start Date and End Date to narrow your search.

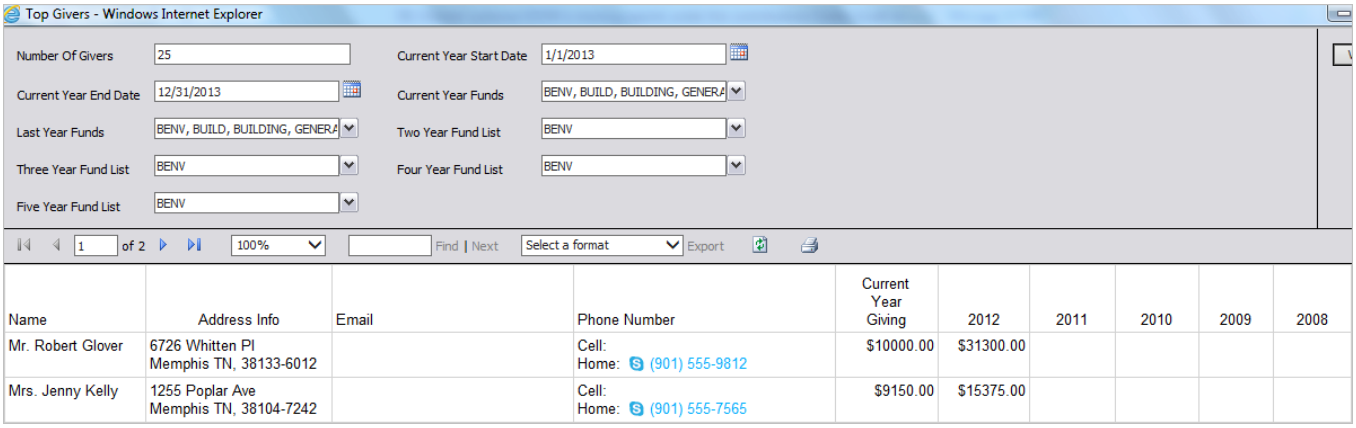


Personal Activity Meter

Use this parameter to select a person's name from the list and to see a graph of the person's Personal Activity Meter (Health Meter).

Top Givers

After entering values for all available fields, this report displays the contact information for each giver across the five-year period.



Report Options

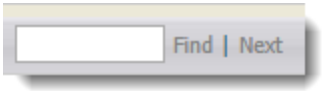
There are several options associated with viewing or printing reports. These options are listed below:

Navigating Through the Pages

You can use the single or double arrows to navigate through a multi-page report. Click the **First**, **Previous**, **Next**, and **Last** page arrows to move between the pages of the report. You can also enter the desired page number manually. The number listed after the box is the total number of pages in the report. Remember, this is the number of pages displayed on the screen, not necessarily printer pages.

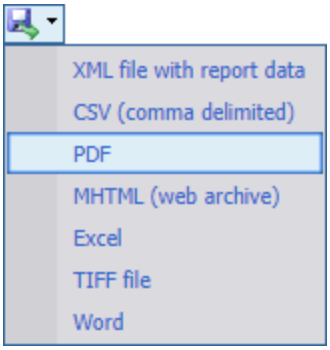
Find/Next

Enter the information you would like to search for in this report, and click the **Find** button. Arena highlights the text, when found.



Exporting

Once the desired report displays, select the export format. This creates a file you can open and print using a multitude of programs. Values for this list may vary and are definable under Report Services.



Refresh

Click the **Refresh** icon to rerun the report.

Family Registration

(This feature is only available for Self-hosted clients.)

The **Family Registration** application is a .Net click-once application, meaning it is a Windows workstation-based application. It is designed to be a manned-station where the user (volunteer) can easily search the database to verify the visitor is not an existing record. Once the volunteer determines the record does not exist, the new record/family can be entered and properly checked into the appropriate class. This feature requires the workstation/computer/tablet to have .Net 4.5 installed and Microsoft Report Viewer, which are both available at no cost.

Below are some of the features and benefits of using this application:

- Volunteers can access the application from any computer on the network.
- Each volunteer can have a unique login. Therefore, it is an ideal application to use to allow volunteers to do data entry work for your organization without going through the hassle of setting them up as a new user on your network.
- The user interface of Family Registration puts most of the important fields for a record on one page, eliminating the need for data entry personnel to navigate between multiple pages to add or modify a record.
- The Family Registration application has a built-in control that can reduce duplicate records.

Below are some configuration steps for Family Registration:

- Review and customize Family Registration Application Settings such as default member

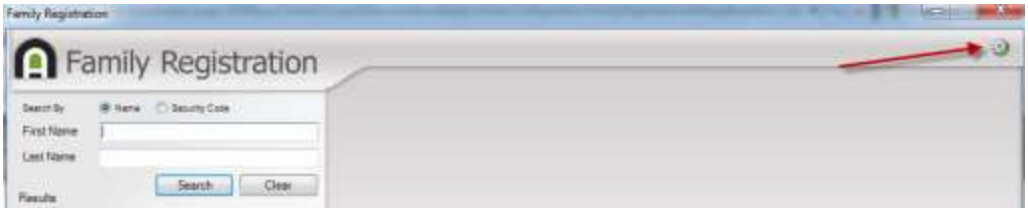
status, attribute groups, default campus, and allowing Check-In.

- Set the Small Group Category ID in the Family Registration application.
- Determine the process for volunteers and staff for entering visitor information to insure a speedy check-in. Remember, additional information can be entered later.
- Establish the process for managing any duplicates that may be created.
- Install Microsoft Report Viewer 2008 and 2010 on all PCs that run Family Registration.

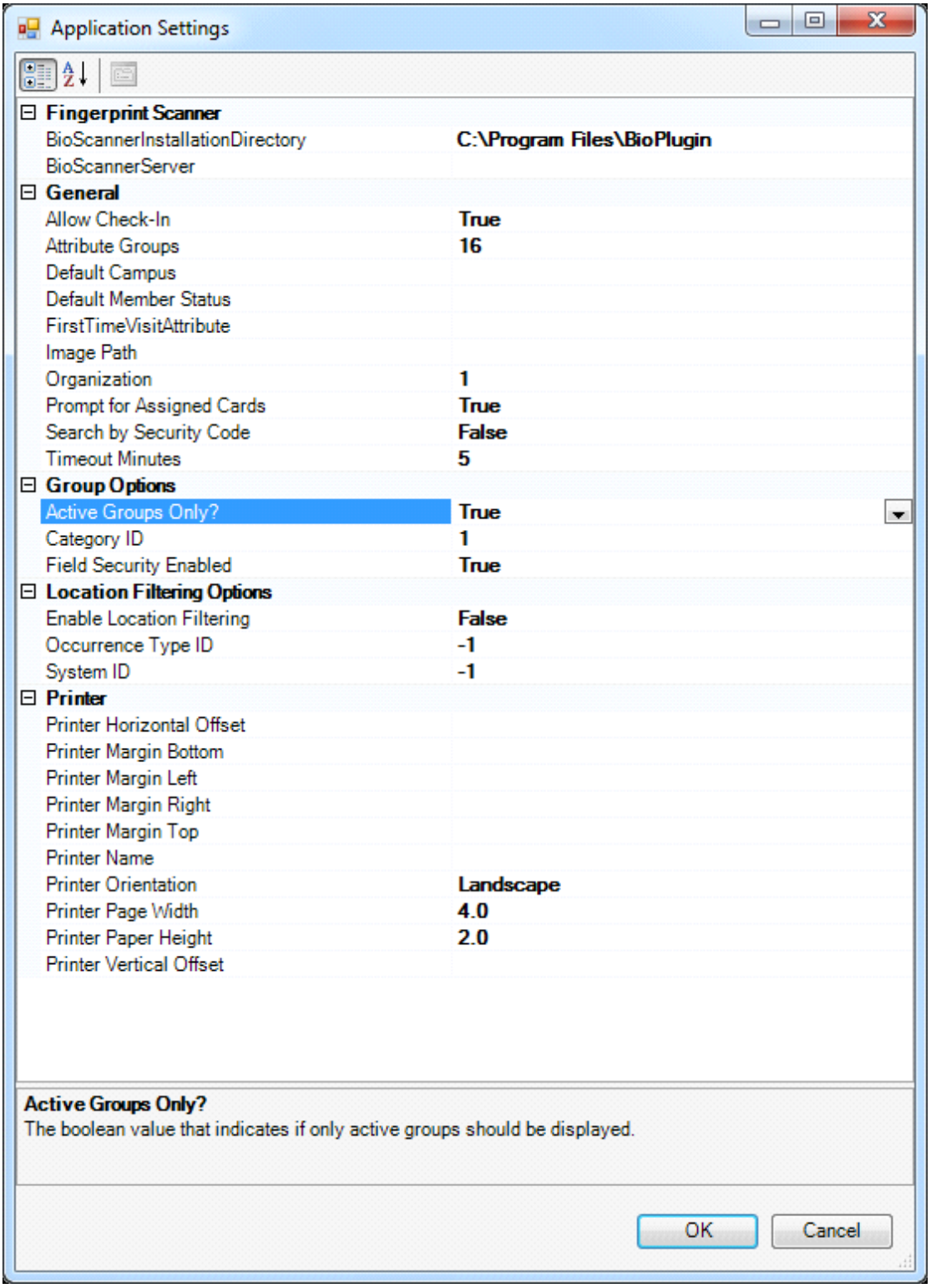
Family Registration Settings

1. From the **Membership** menu, click the **Family Registration** option. Enter your login information.

2. Click the **Application Settings** icon.



3. Make desired changes.



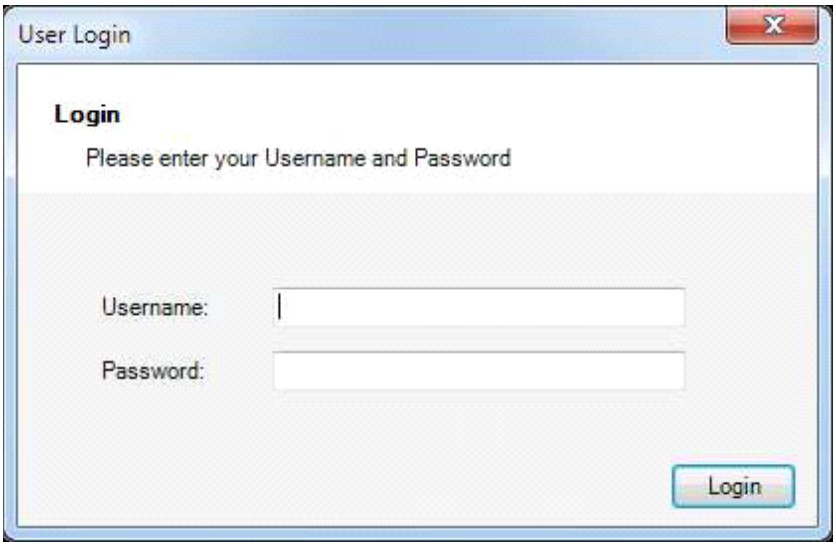
5. Click the **OK** button.

Use Family Registration

1. From the **Membership** menu, click the **Family Registration** option and login. (When opening

Family Registration for the first time on this workstation, you have the opportunity to save a desktop shortcut.)

2. Enter **Username** and **Password**. (For users who already have an Arena Username and Password, this is the same.)

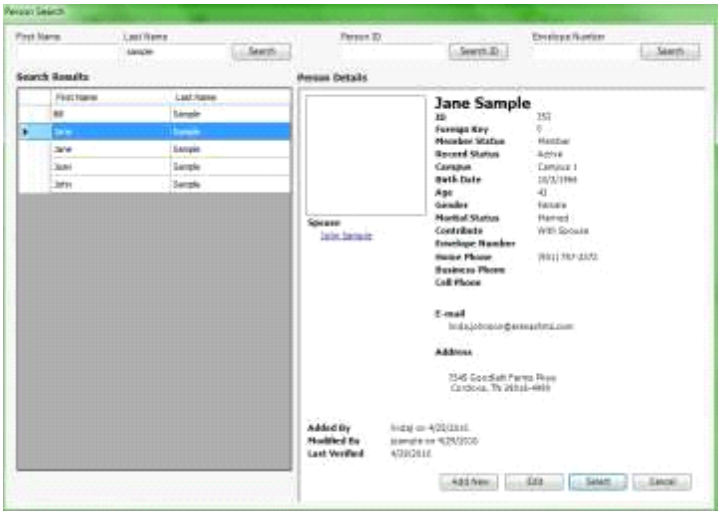


3. Click the **Login** button.

4. Select how Arena should flag First Time Visitors. The First Time Visitor report in Membership consists of records flagged.

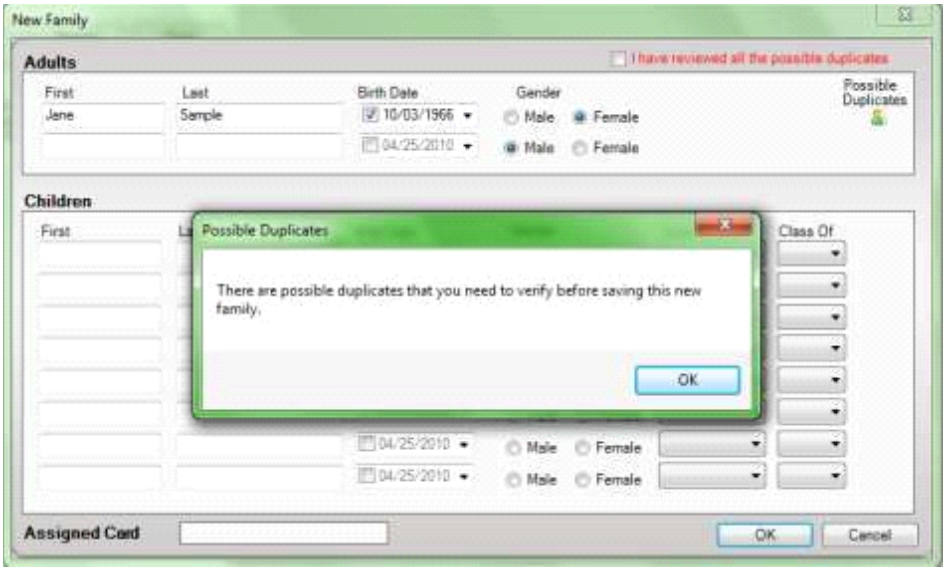
5. Use the Quick Search fields to first search for the record to be sure it does not already exist.

6. If the same name already exists, these records display for you to review. You can select any record for additional information to display in the **Person Details** window.



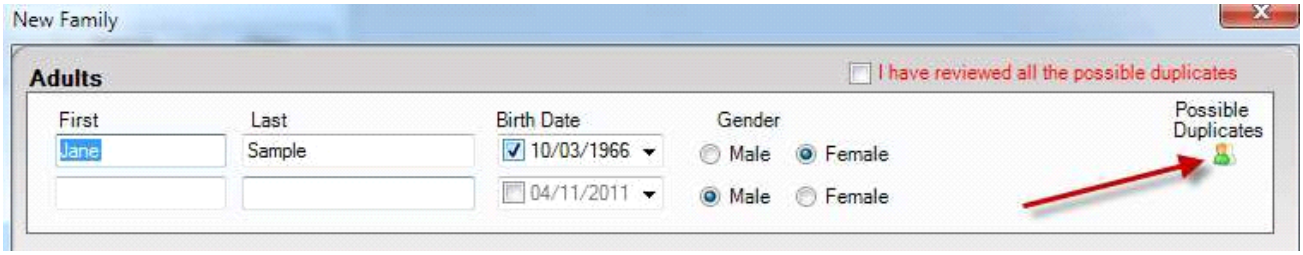
7. Click the **Add New** button to enter information for the new person. You can enter children with no adults.

8. Enter the **First** and **Last Name**, and **Birthdate**. If you enter a name and birthdate that matches an existing record, the below error message displays. A complete date in **MMDDYYYY** format is required. If the year is not available, consider using a default year such as 1900.



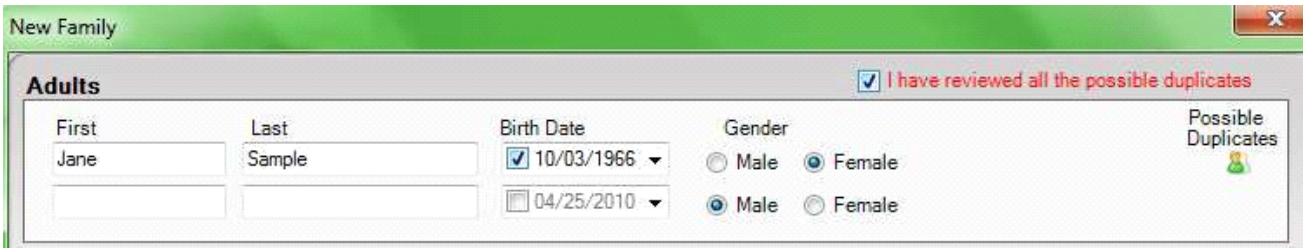
9. Click the **OK** button.

10. Click the **Possible Duplicates** icon to view additional information of the records.

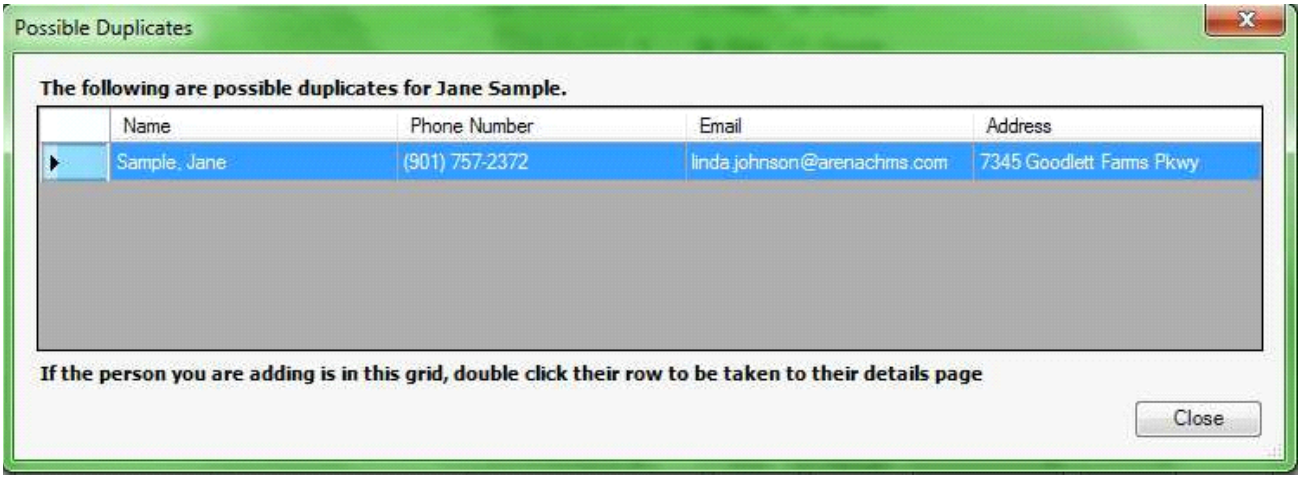


11. You can select any record and it displays in Family Registration or click the **Close** button to enter a new record.

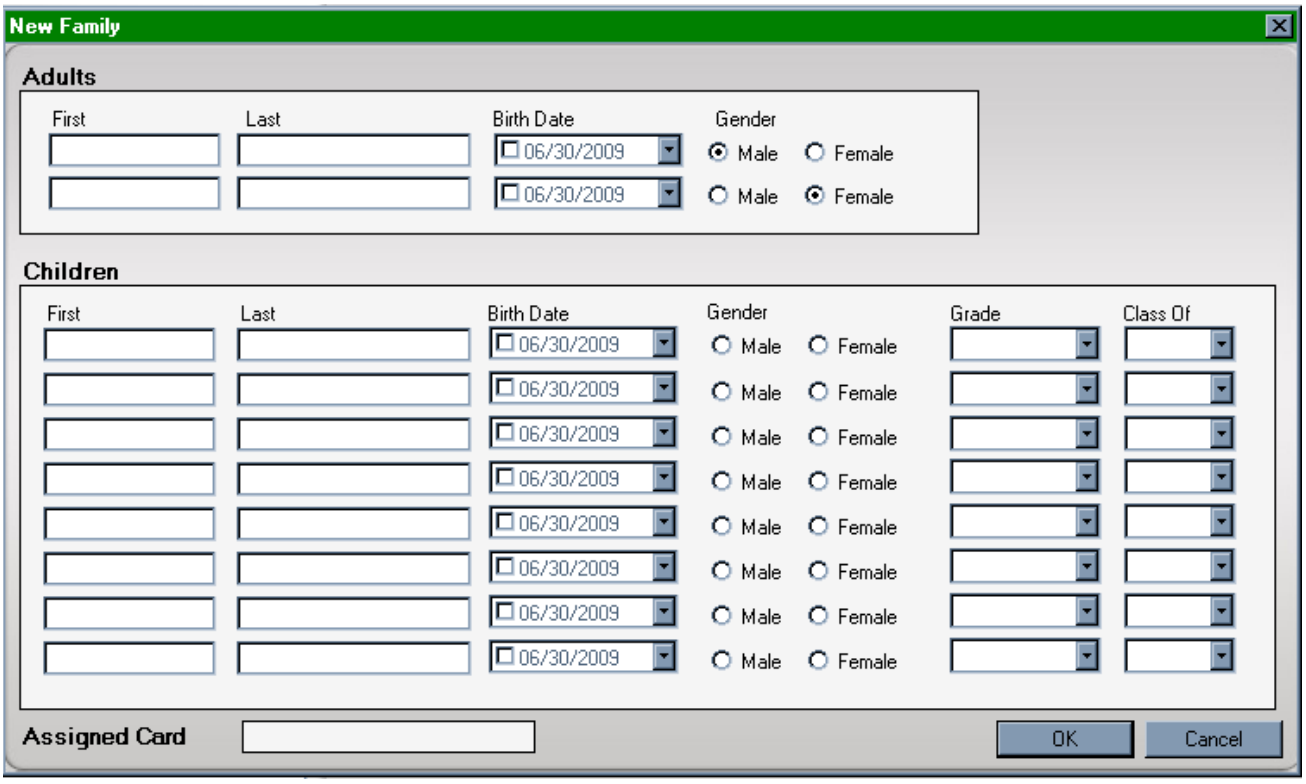
12. Click the **I have reviewed all possible duplicates** check box.



13. Click the **OK** button to proceed with adding the new record or family. You can enter children without an adult.

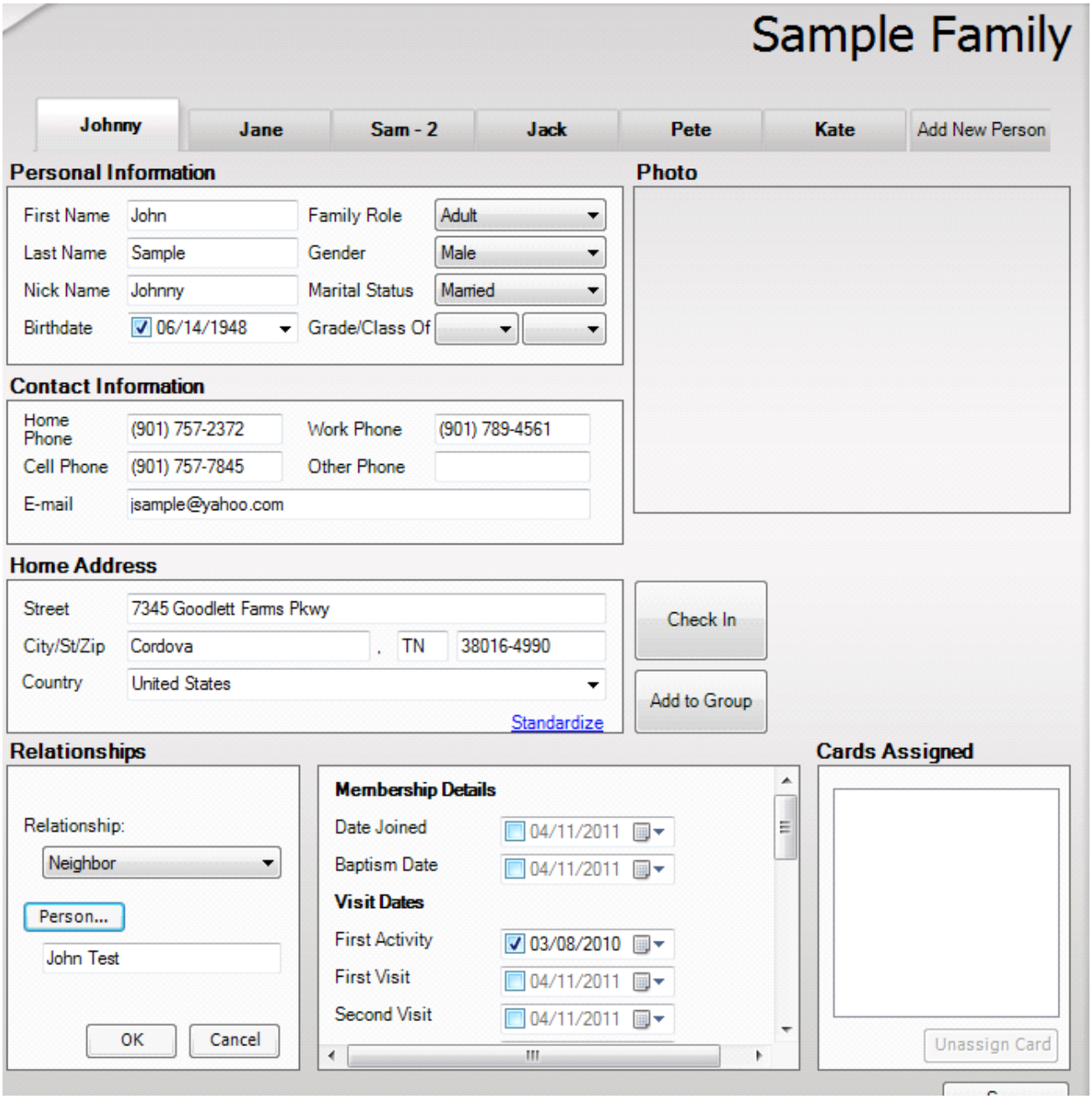


14. On the **New Family** page, fill in the first and last name for every family member. Arena allows one adult male and one adult female in a family, so it is important to enter the appropriate name in the corresponding line for the adults of a family. All other persons you add to a family are with the role of "Child." Enter a birthdate, if available. You must select a gender for each person. Once you enter all family members, scan or swipe a check-in card for the family. The card ID number shows as the Assigned Card number for that family. Click the **OK** button when done.



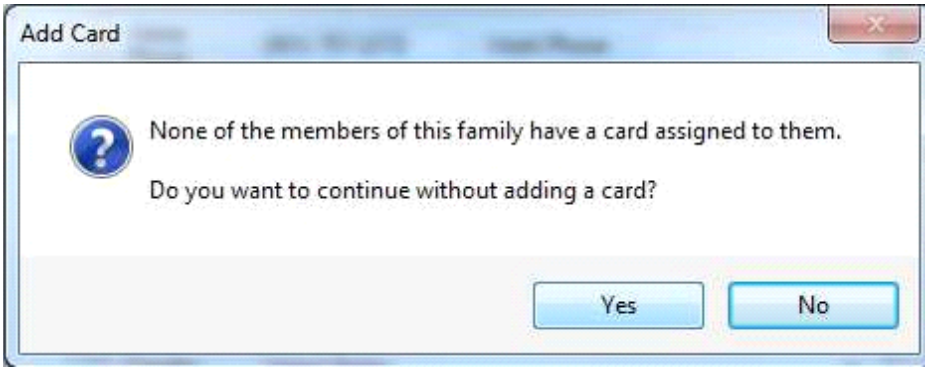
15. Family members display as separate tabs along the top of the page in chronological order by age. Arena generally considers the oldest adult member of a family the "Head of House", so the Head of House is the initial tab. Click any **Name** tab to view the specific information about that person. Arena formats 10-digit telephone numbers. Editing the home phone or address

of an adult propagates for all family members. (See your Arena Administrator regarding Relationships and the available Member fields.)



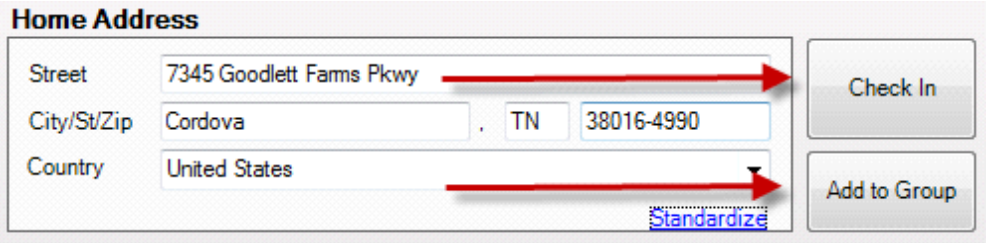
16. Check-In can use a barcode or magnetic strip card to make it easy to select the correct family. When viewing the **Family Information** page, simply scan the barcode or swipe the card. This enters the code in the Cards Assigned section. All cards you assign apply to all members of a family. You can have multiple cards, if desired. Click the **Unassign Card** button to remove a card.

17. Click the **Save** button. If your organization uses cards and you have not assigned a card to the new person, the Add Card pop-up displays.

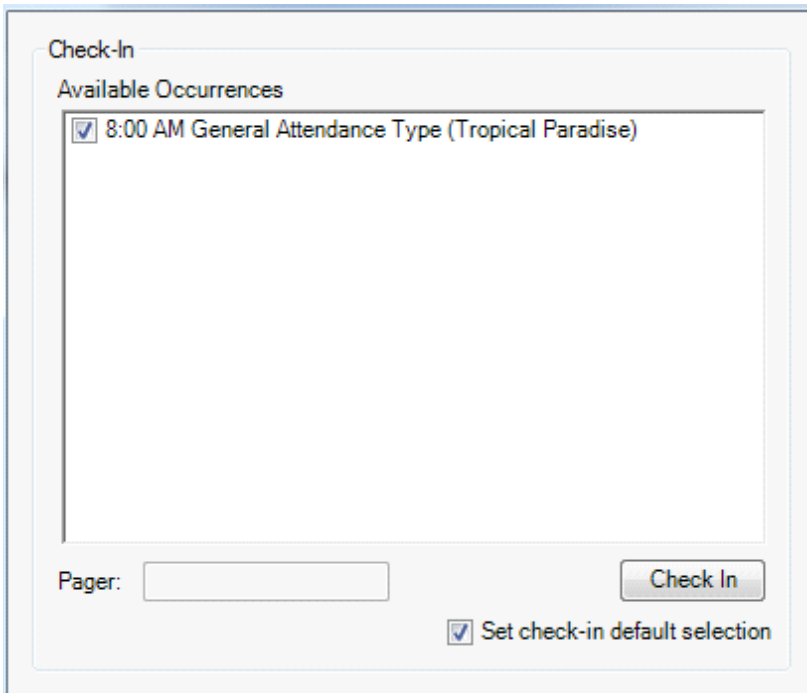


18. Click the **Yes** button to continue without assigning a card.

19. After saving the record, you have the option to **Check In** the person or **Add to Group and Check In**. Arena formats 10-digit phone numbers. You can standardize U.S. addresses without saving the record. If you enter an international address, you do not need to enter the city, state and zip.

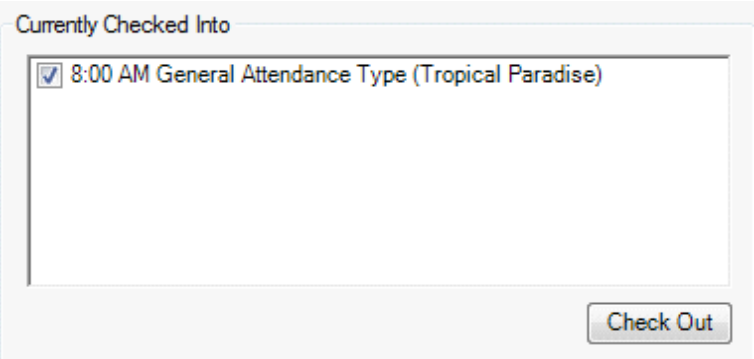


20. If you select **Check In**, select the applicable **Occurrence**(s) for the person. You can optionally select "Set check-in default selection" so that the next time the person checks in using Arena Check-In, Arena associates them with the Attendance Type.



21. Click the **Check In** button. You can also set the default Attendance Type Occurrence for this person.

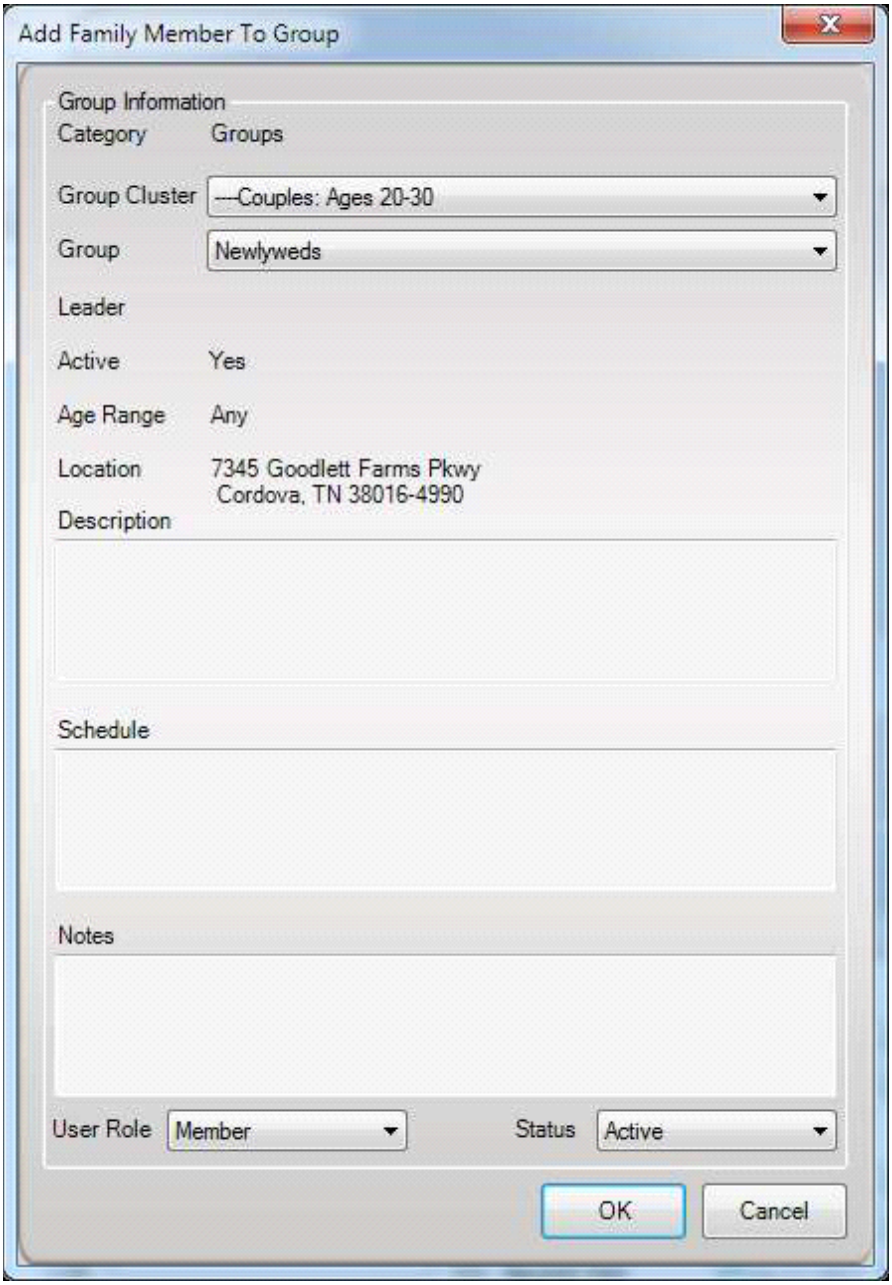
This pop-up window also displays where the person is currently Checked In.



22. Click the **Close** button.

23. If you select **Add to Group**, you can select the Group Cluster and existing Group.

24. Select User Role and Status.



25. Click the **OK** button.

26. The Group Confirmation displays.

27. Click the **OK** button.

Mailing

Mailing is a click-once application that runs off Shelby Mailroom where you can process bulk email presorts for mass mailings, process printed contribution statements or process email contribution statements.

Shelby Mailroom is a standalone Shelby product and a subscription is required for bulk mailings, but not for emailing contribution statements.

(For self-hosted environments, this application requires the workstation/computer/tablet to have .Net 4.5 and Microsoft Report Viewer 8.0 and 10.0 installed, which are both available at no cost.)

(For hosted environments, Mailroom can be installed on individual workstations where CASS certification and Move Agent can be processed but does not post back to Arena.)

Administrative Setup

If using Mailroom, install the Mailroom Service on the Arena server. Technically, Mailroom can be installed on the Arena server or a completely different server as long as the Mailroom Service is installed and the Mail Room Server Organization Setting points to the server where Mailroom is installed.

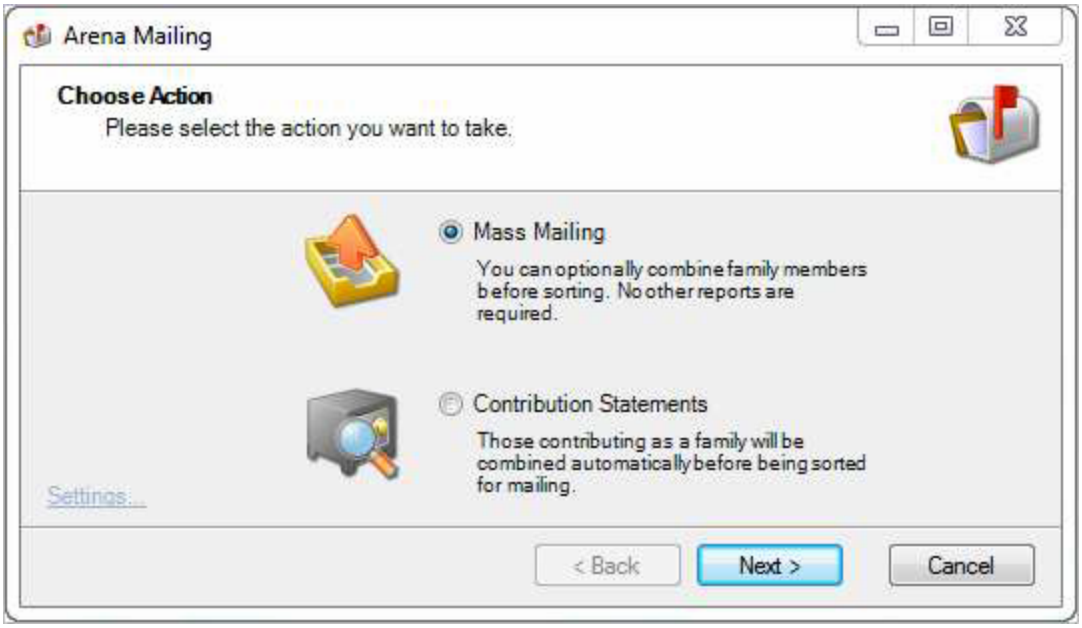
Customize Mailroom Application settings on the **Application Settings** page. (For Arena Hosted install Mailroom on each workstation. Enter the server name for Shelby v.5 workstat folder in the Mailroom Server Organization setting. We recommend using a mapped drive.)

If emailing contribution statements mark Email Statement and enter PIN number on the **Person Detail** page of each recipient. Shelby Mailroom is not required for this feature. Alternately, users can use the Email Statements in Contributions.

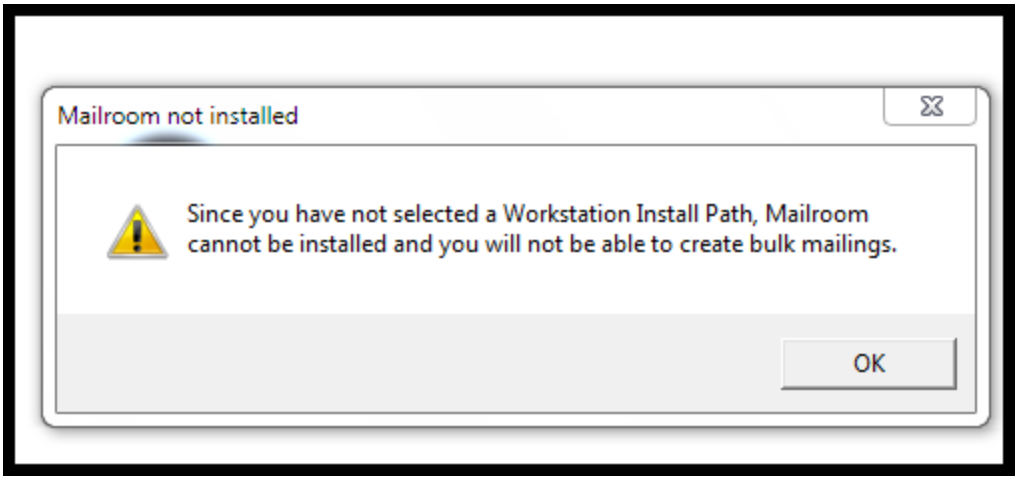
If using Mailing for bulk mail, this requires a subscription to Shelby Mailroom. On the mailroom DVD you need to install Mailroom on the server (if using Arena Hosted, install on individual workstations) and the Arena Agent on the DVD. If you would like information about Mailroom, please contact Shelby Systems at (800) 877-0222.

Install .Net 4.0 and Report Viewer (8.0, 9.0 and 10.0) on all workstations using the Mailing application.

If launching Mailing from a network workstation, the below window displays.



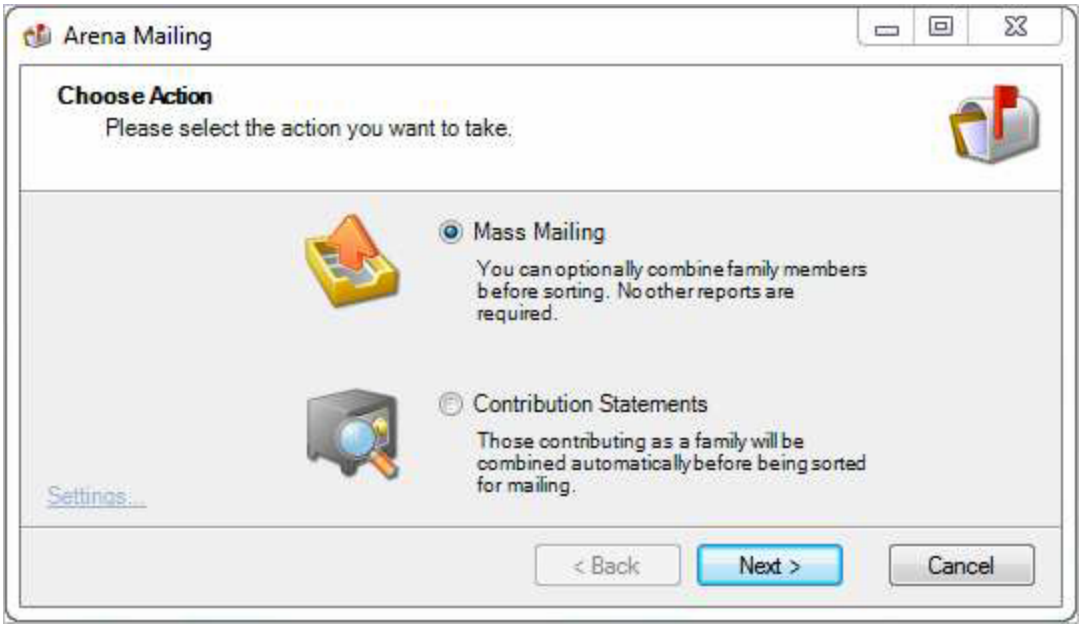
If launching Mailing from a non-network workstation, the below window displays. You can install Mailroom on each applicable workstation.



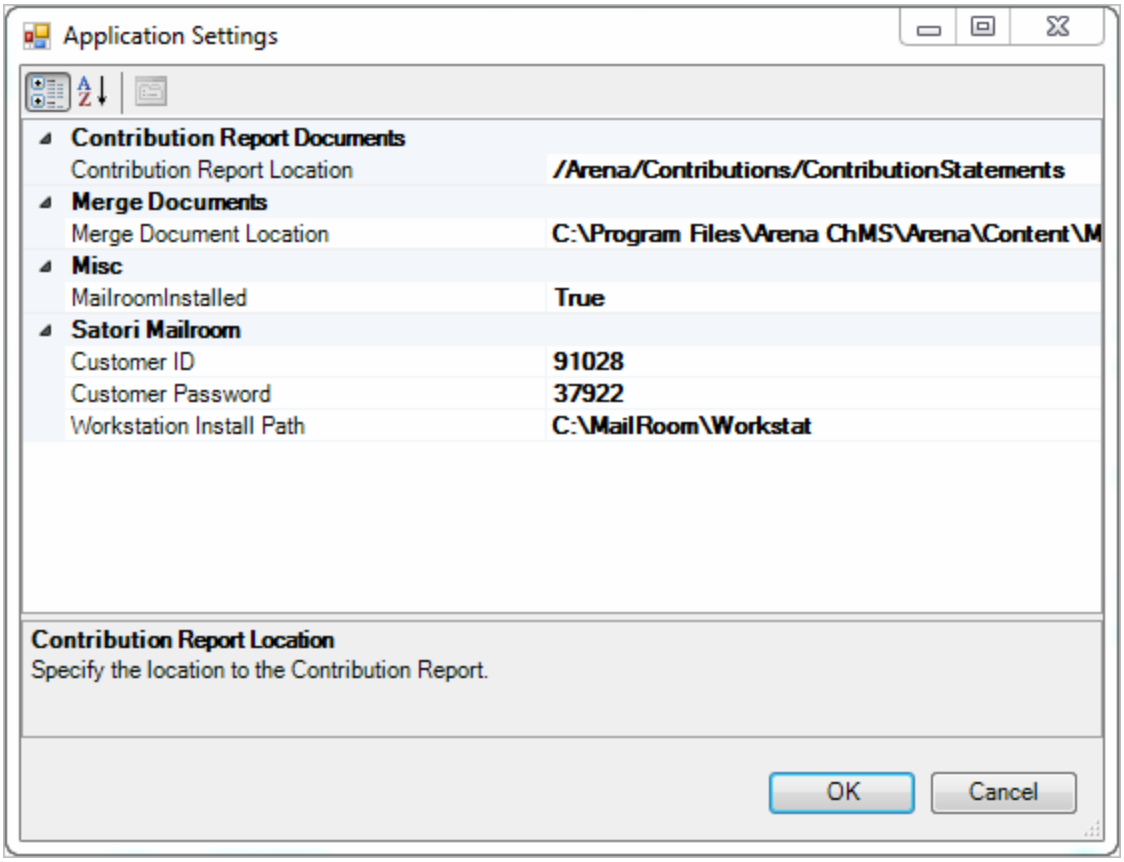
Manage Mailing Settings

1. From the **Membership** menu, click the **Mailing** option to open the click-once application.

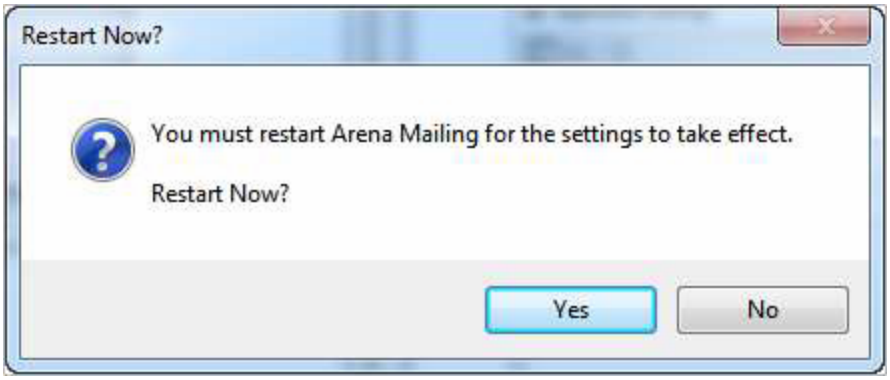
2. Click the ***Settings*** link.



3. From this window, verify the Organization and Customer ID are correct.



4. Click the **OK** button. You need to restart the application.

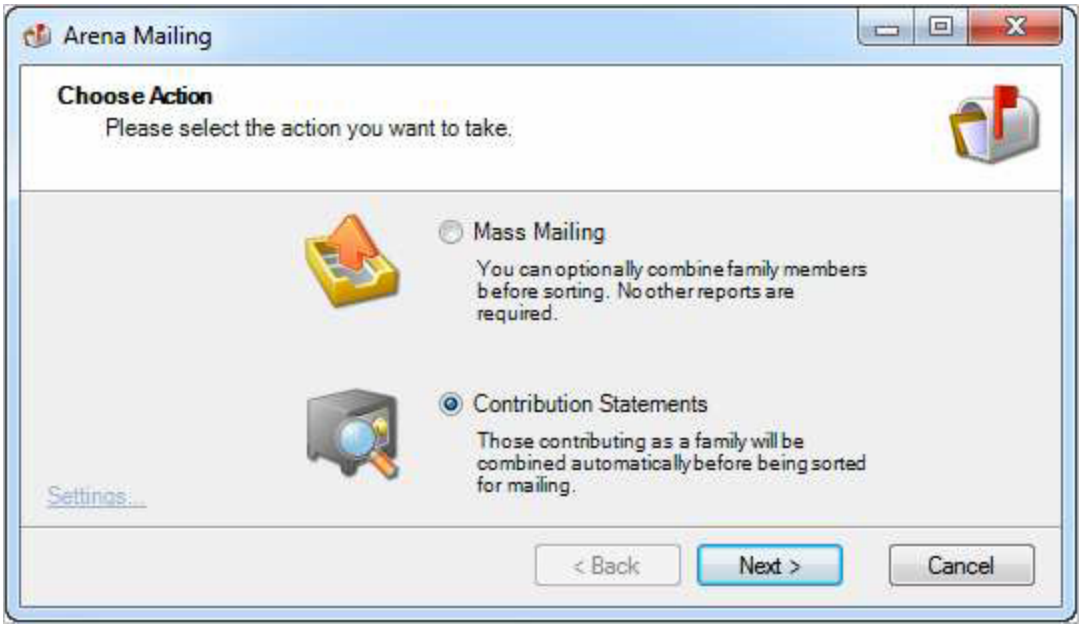


Create Printed Contributions Statements using Mailing

All print contribution statement recipients must be an active record and have Print Statement selected on the person's record.

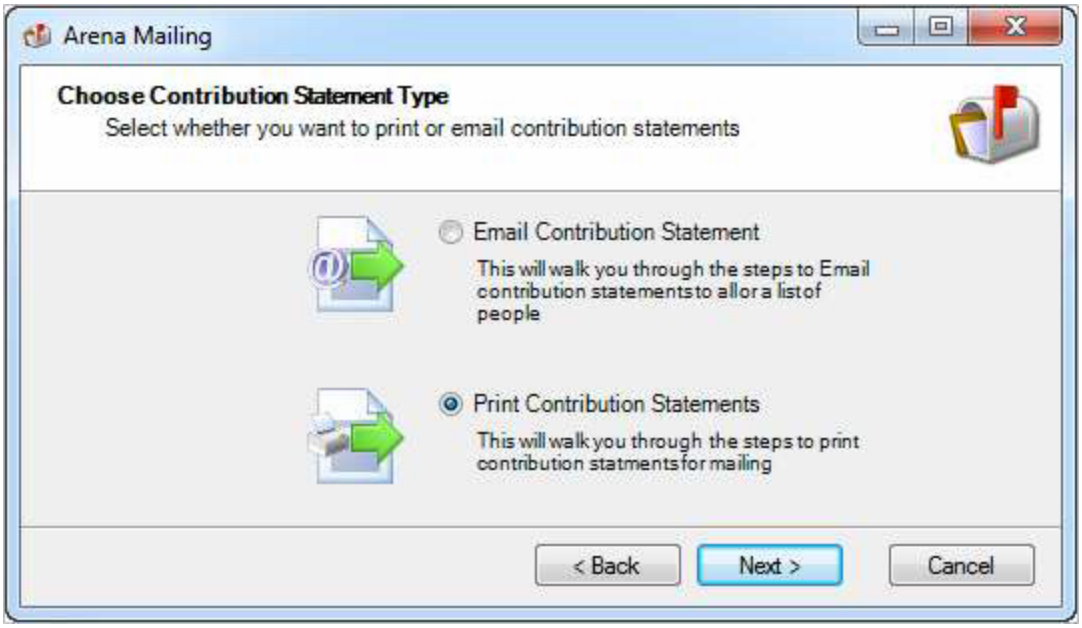
1. From the **Membership** menu, click the **Mailing** option.

2. Select the **Contribution Statements** radio button.



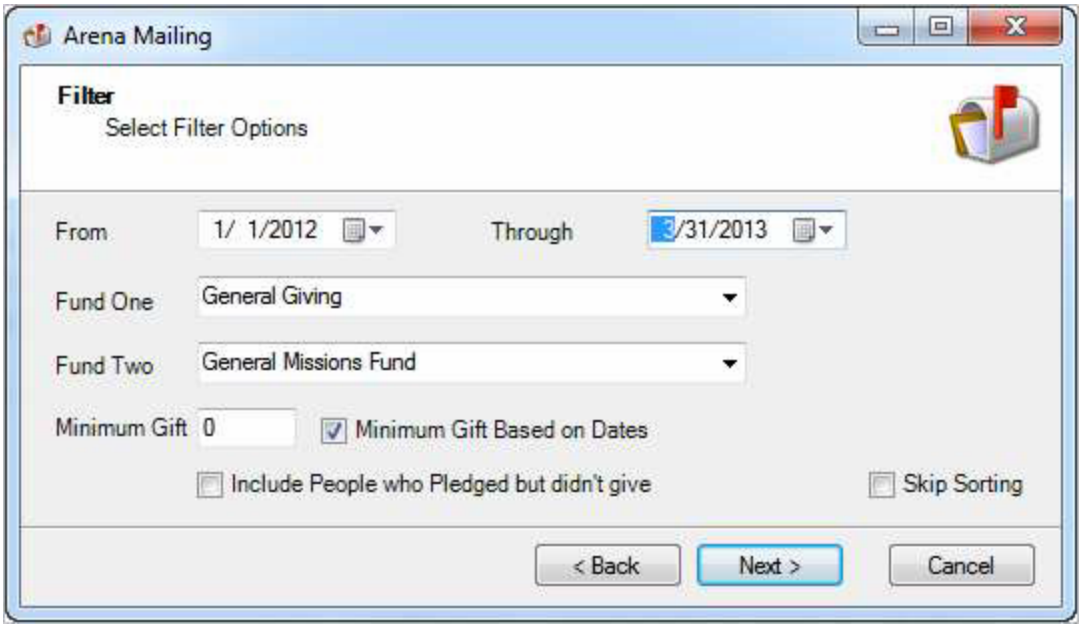
3. Click the **Next** button.

4. Select the **Print Contribution Statements** radio button.

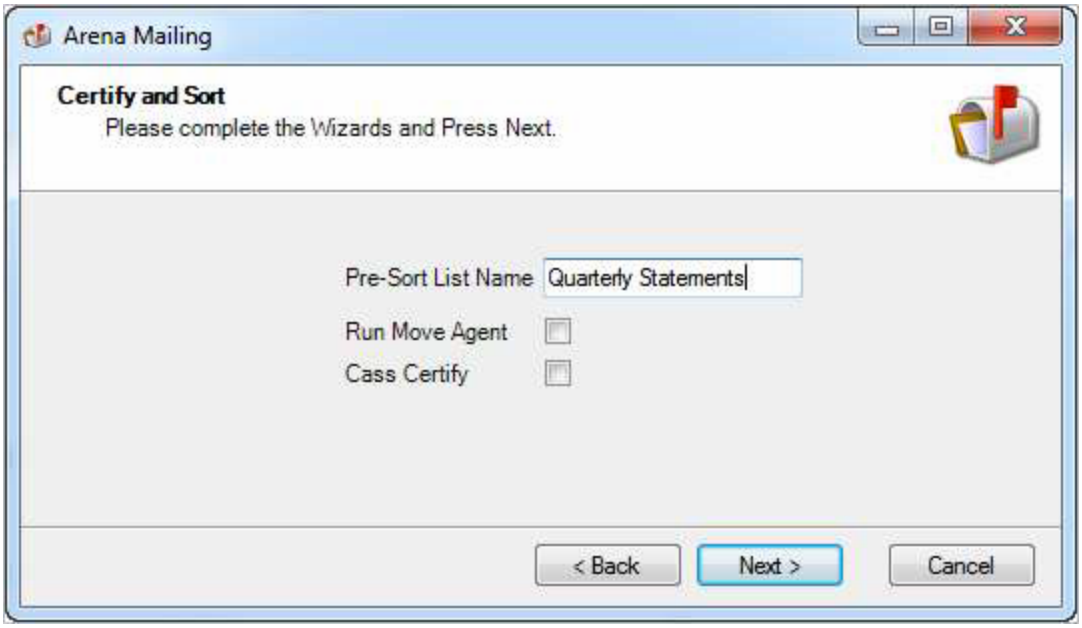


5. Click the **Next** button.

6. Complete all **Filters**.

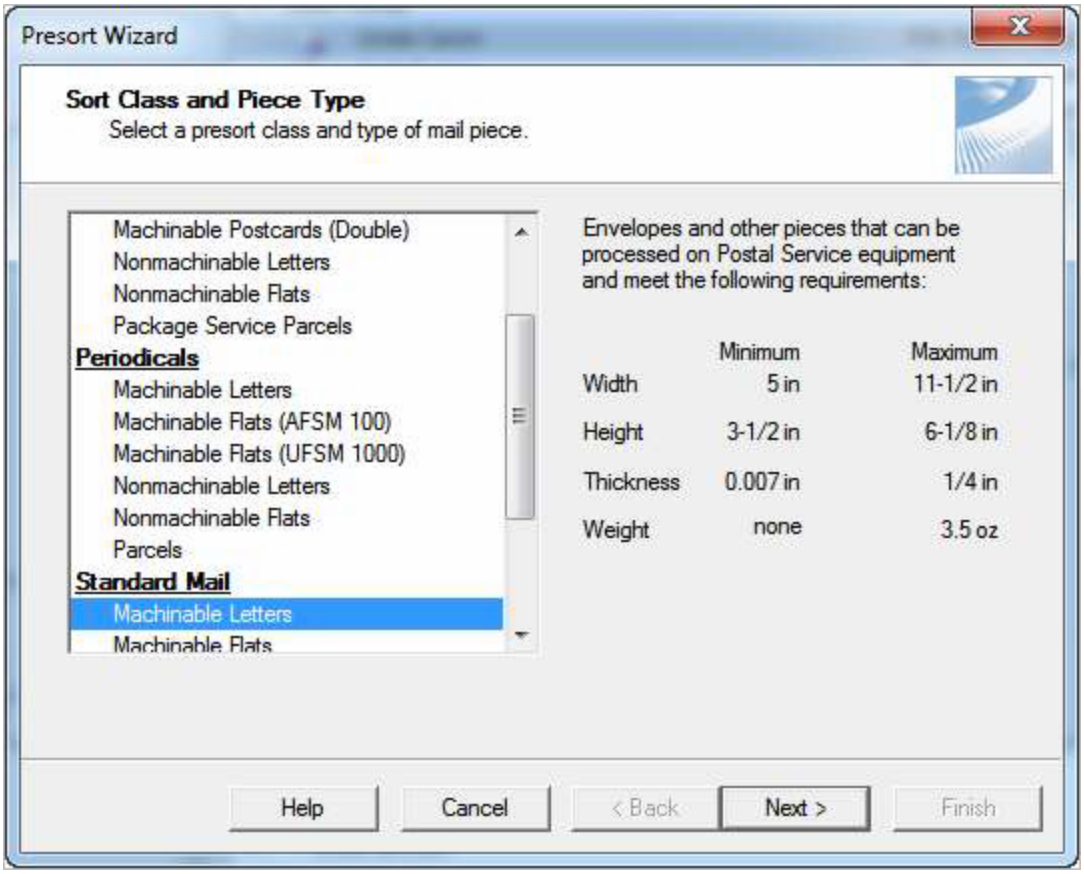


7. Select **Certify and Sort** options. When running the Move Agent, the current address is moved to the Previous Address type for all family members.



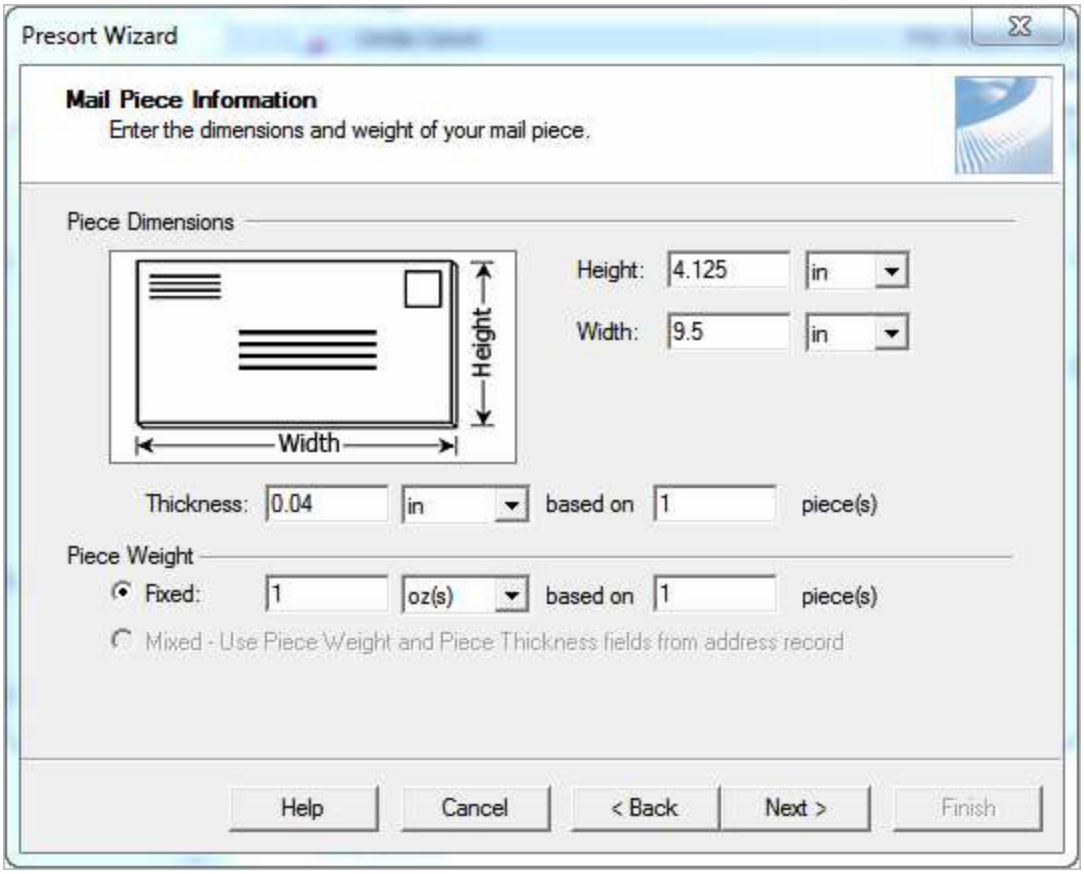
8. Click the **Next** button.

9. Select **Sort Class and Piece Type**.



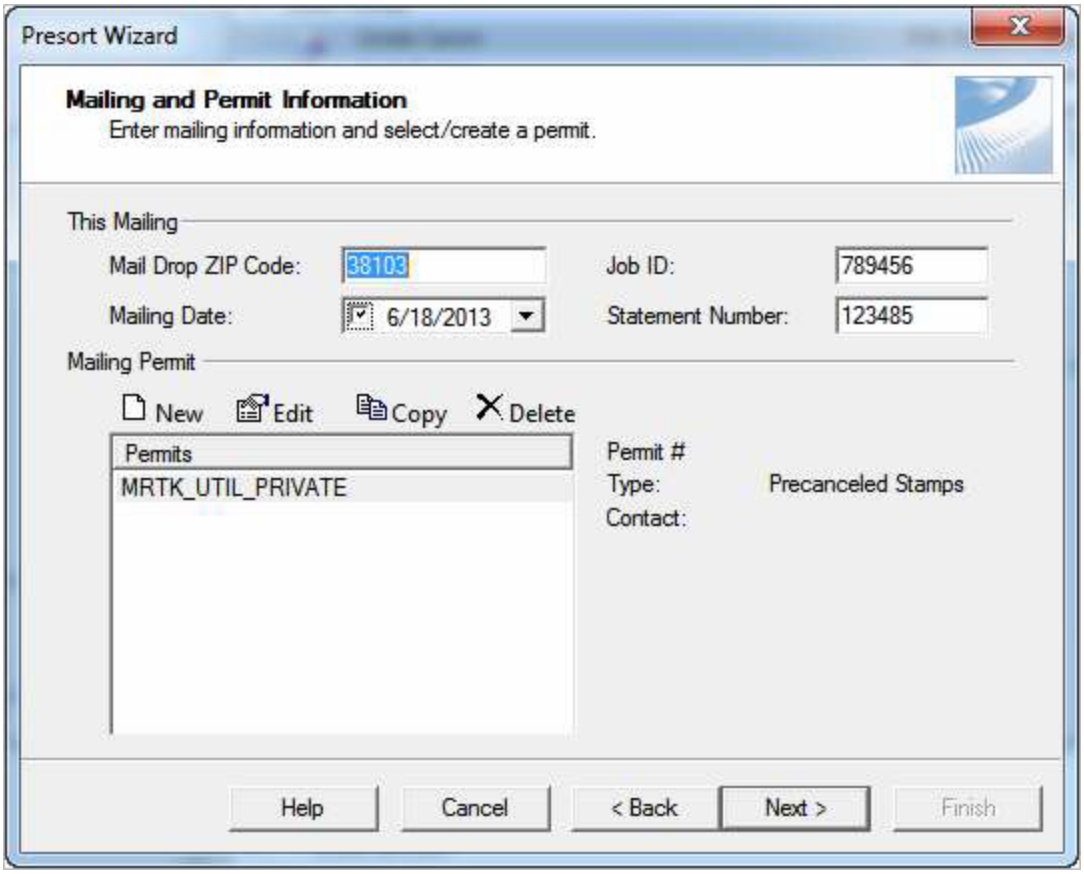
10. Click the **Next** button.

11. Select **Mail Piece Information**.



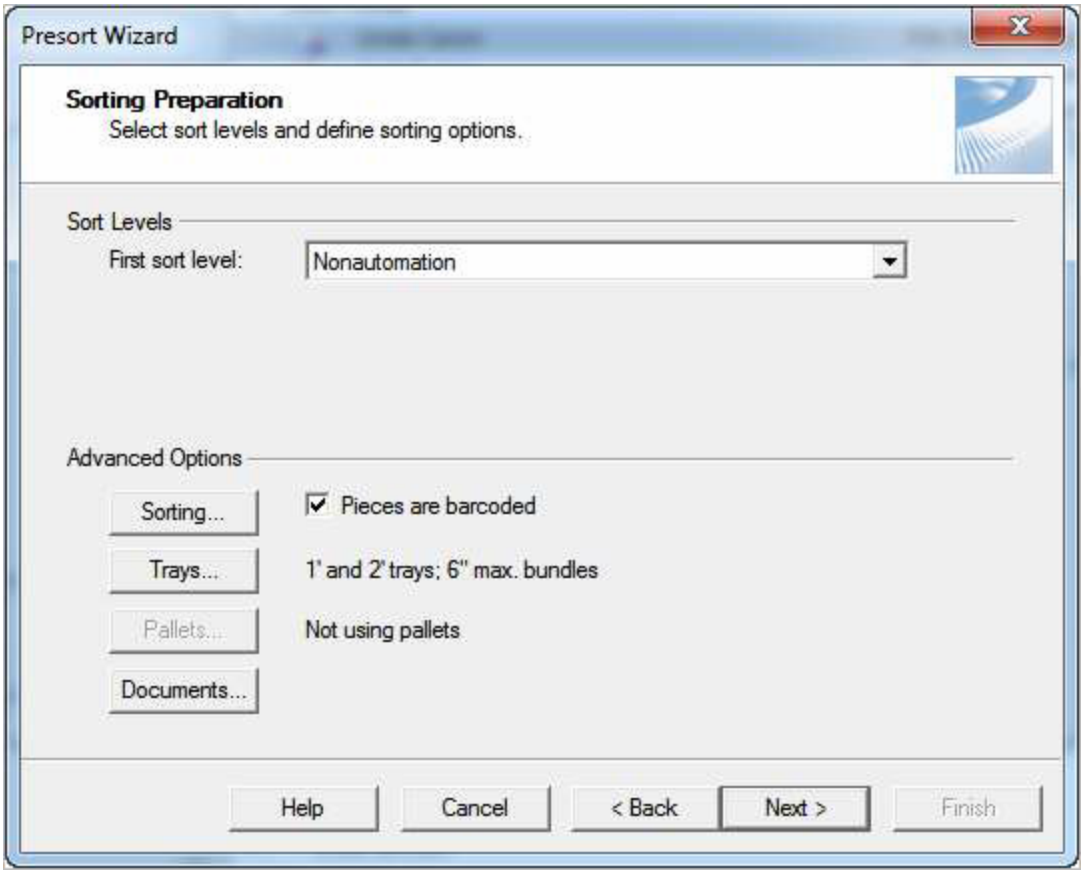
12. Click the **Next** button.

13. Select **Mailing and Permit Information**.



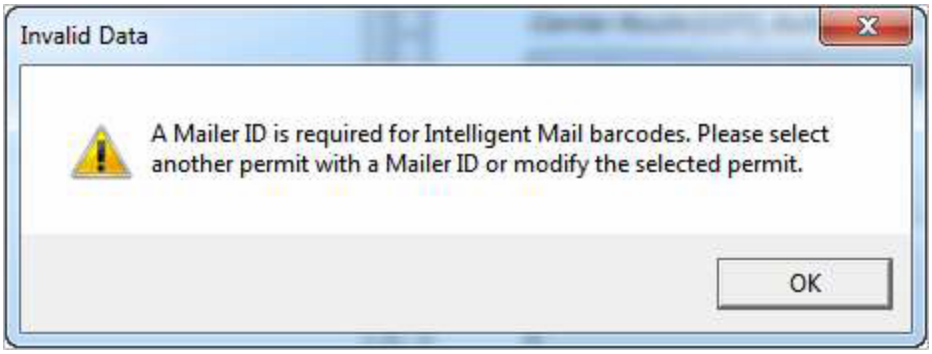
14. Click the **Next** button.

15. Select **Sorting** option. Available sort options are Carrier Route (simplified addressing), Carrier Route (WS), Carrier Route (LOT), Automation and Non-automation. A Mailer ID is required for Intelligent Mail barcodes.

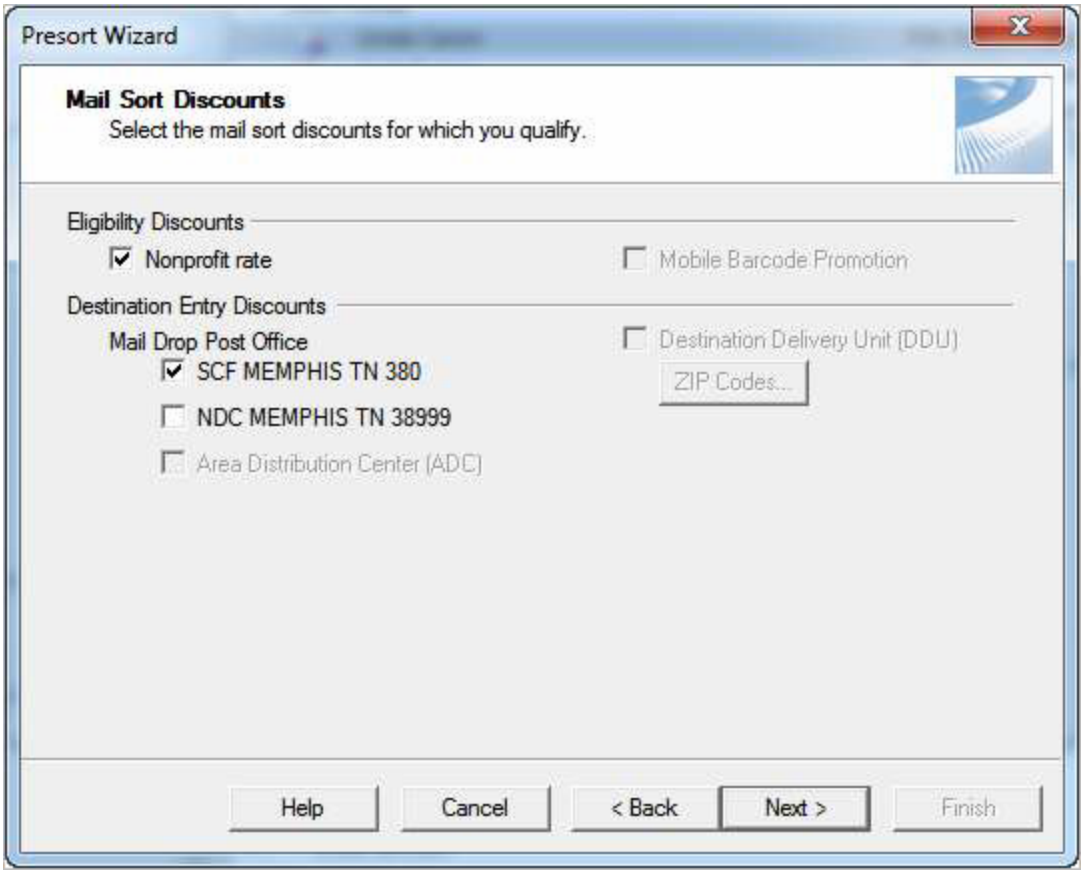


16. Click the **Next** button.

17. If you select Pieces are barcoded and the permit does not include a Mailer ID, the below window displays.

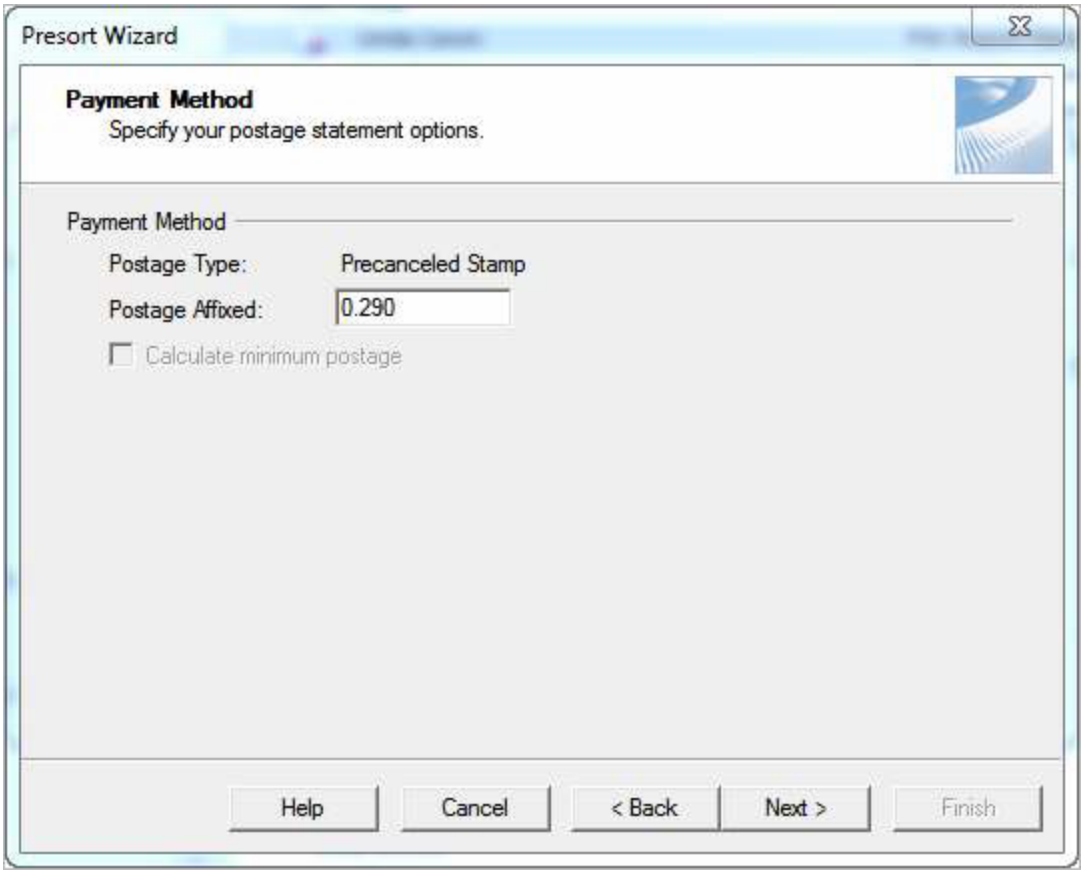


18. Select **Mail Sort Discounts**.



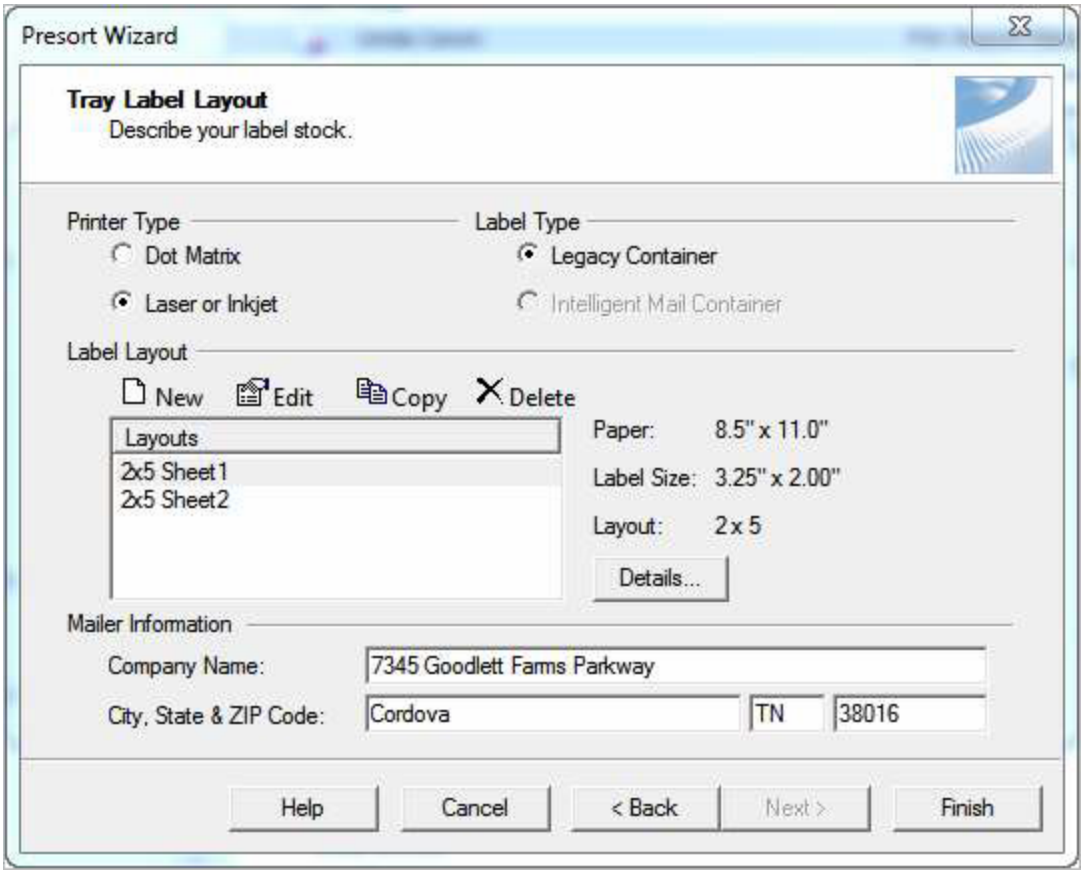
19. Click the **Next** button.

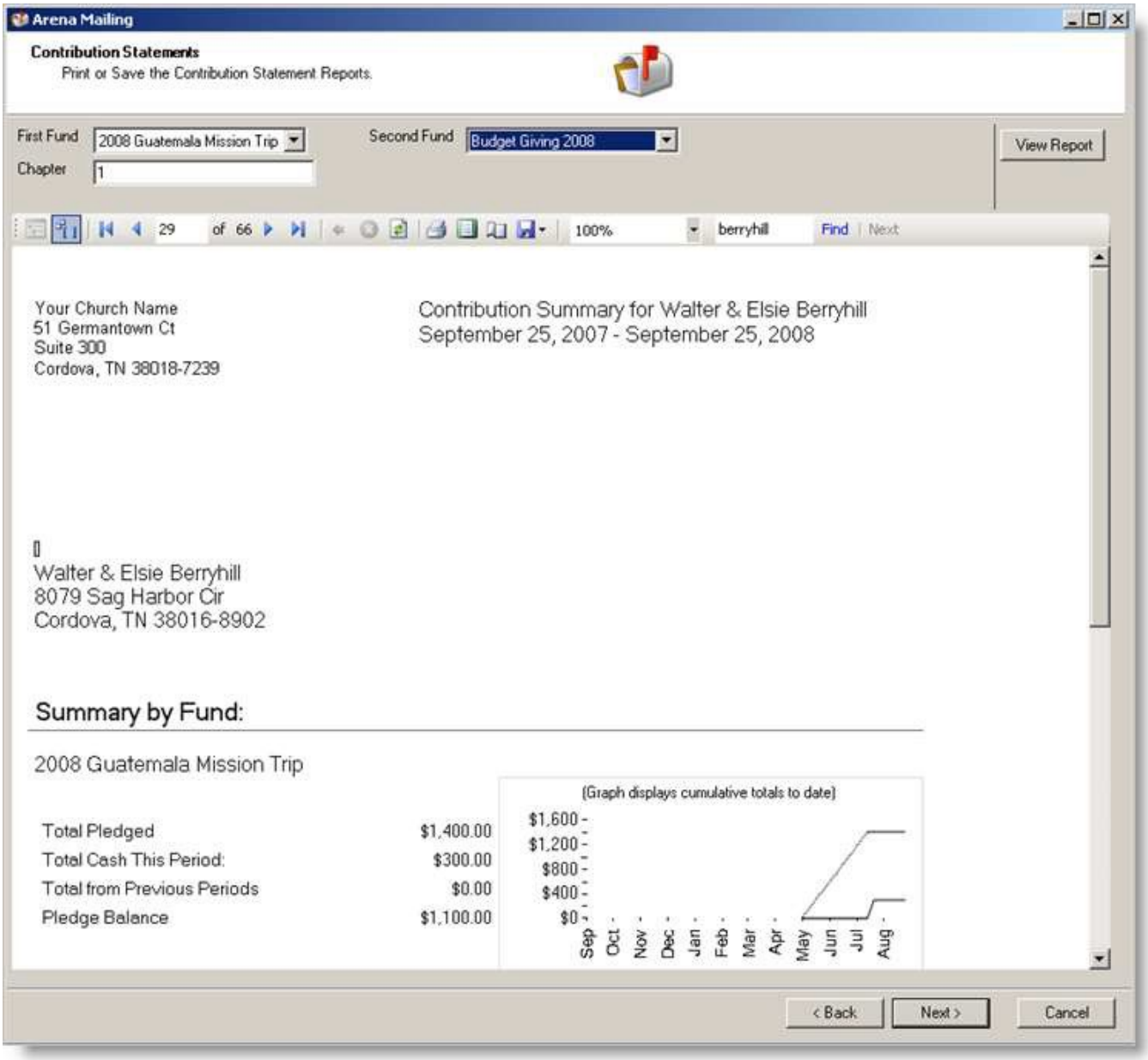
20. Enter the affixed postage value.



21. Click the **Next** button.

22. Select **Tray Label Layout** options.


Presort Wizard
Tray Label Layout
Describe your label stock.
Printer Type
Dot Matrix
Laser or Inkjet
Label Type
Legacy Container
Intelligent Mail Container
Label Layout
New
Edit
Copy
Delete
Layouts
2x5 Sheet1
2x5 Sheet2
Paper: 8.5" x 11.0"
Label Size: 3.25" x 2.00"
Layout: 2 x 5
Details...
Mailer Information
Company Name: 7345 Goodlett Farms Parkway
City, State & ZIP Code: Cordova TN 38016
Help
Cancel
< Back
Next >
Finish

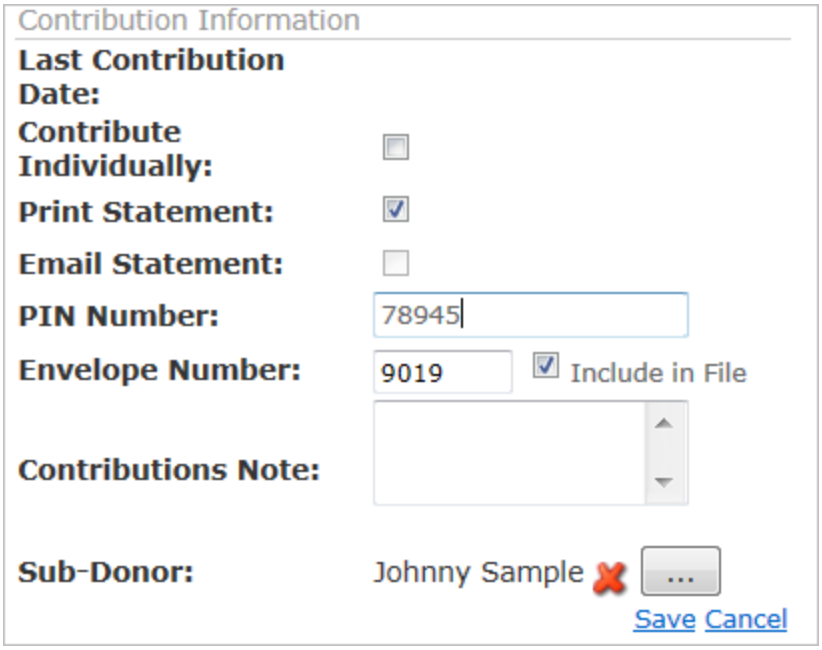


Email Contribution Statements through the Mailing Applicatio

All e-statement recipients must have an active record status, an email address, the email statement selected on the person detail page and a PIN number. If one spouse is marked **Contribute Individually**, then you must also mark the other spouse. In the case of a husband and wife contributing, the statement is sent to the head of household, which is the male.

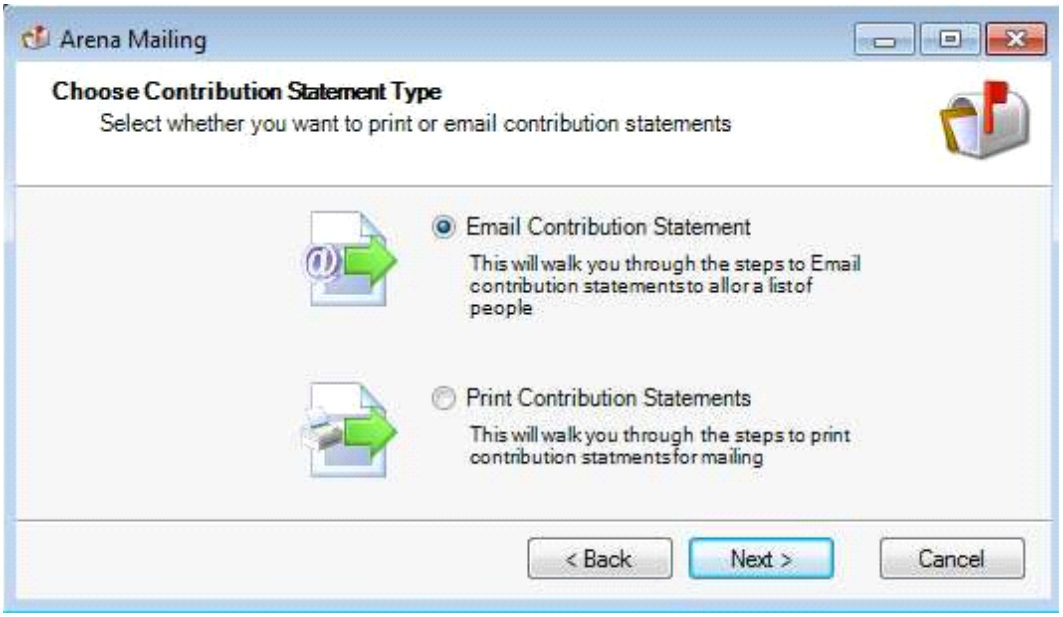
- Verify Email Contribution Statement agent is running.
- Customize Contribution System email.
- Verify all Mailing Application settings.
- Verify all recipients have a valid email address.
- Verify Email Statement and PIN Number fields are complete for each recipient on their

person detail page.



1. Open the **Mailing** application.

2. Select the **Email Contribution Statement** radio button.



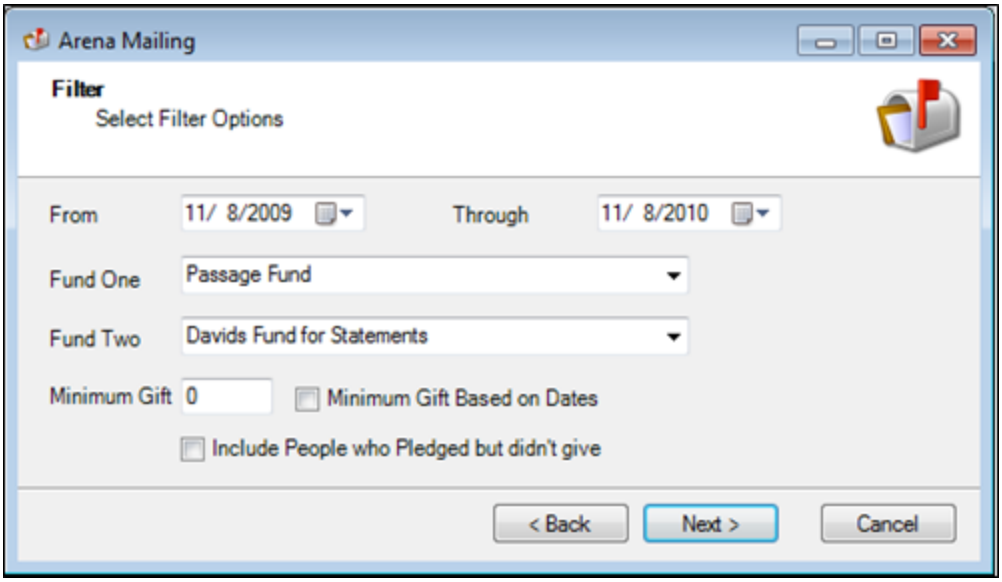
3. Click the **Next** button.

4. Select **Email Contacts**.

5. Select the **All Membership** radio button to select all records that meet the email statement requirements or select **From a List** to use an existing list.

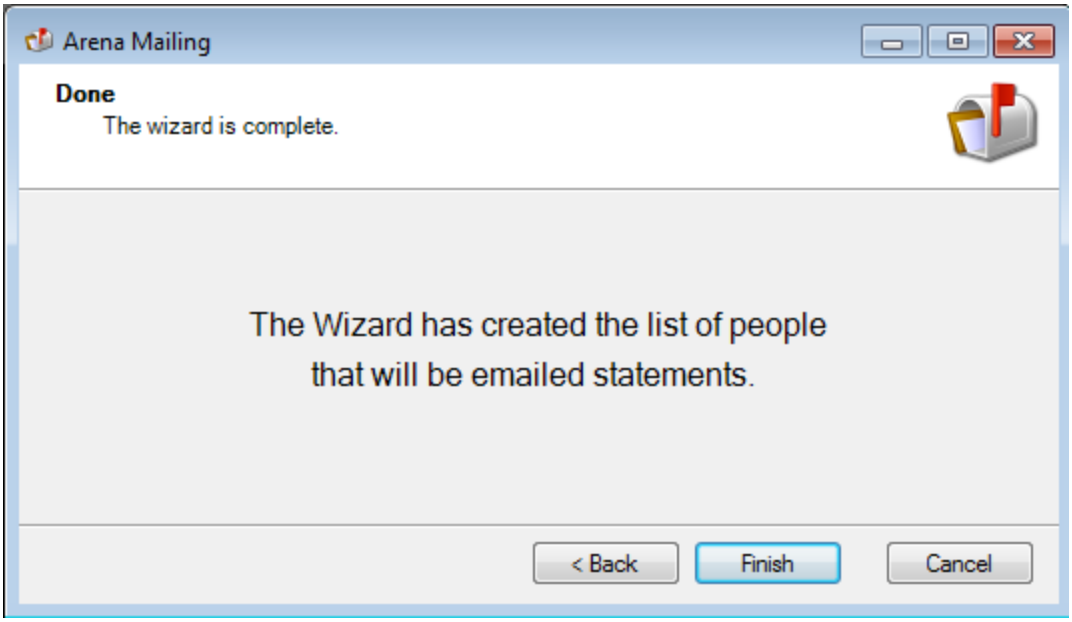
6. Click the **Next** button.

7. Select **Filter** options.



8. Click the **Next** button.

9. Click the **Finish** button. Arena emails statements, using the agent schedule.



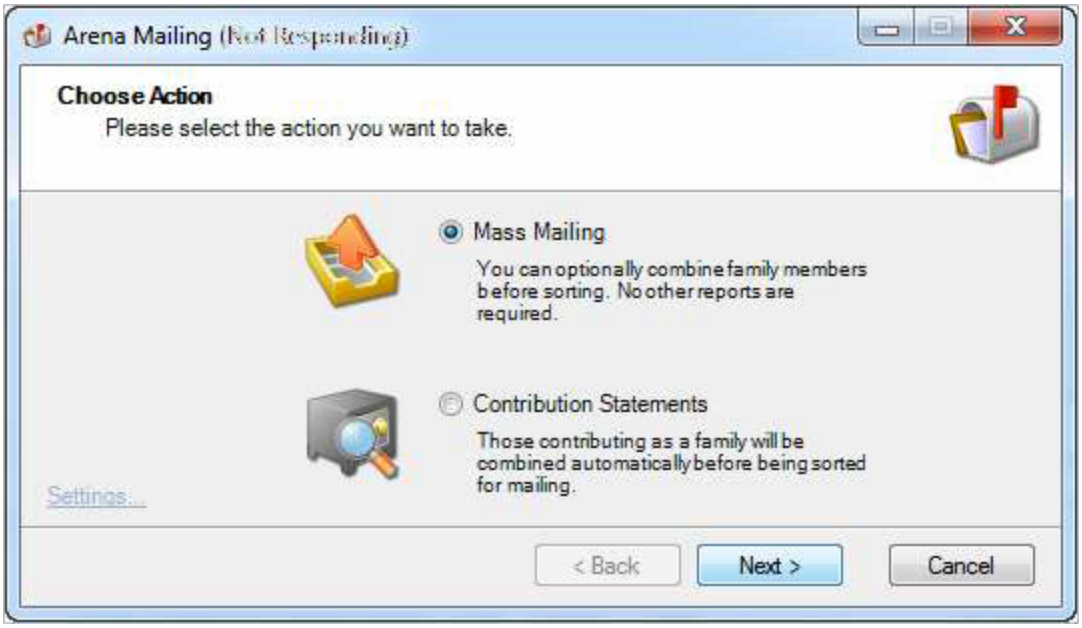
You can optionally use Lists:

- Setup the ArenaEmailContributionStmt agent.
- Select the report you want to use in the module setting for the Email Statement module.
- Select the List to use to select the records for running statements.
- Fill out the remaining criteria.
- Click the **Send Emails** button.

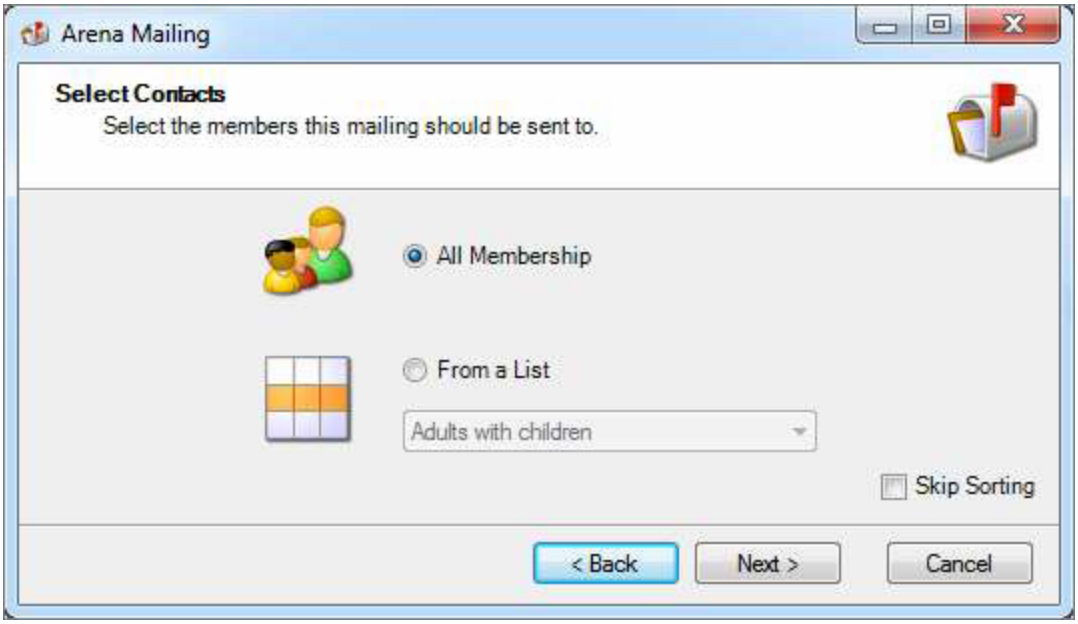
Create a Mass Mailing

You can run a mailing list using either the entire database or an existing list. You must have a minimum of 200 addresses in order to create a bulk mailing and CASS certify. Before running a mass mailing, it is recommended to verify Mailroom is up-to-date.

1. From the **Membership** menu, click the **Mailing** option.
2. Select the **Mass Mailing** radio button.

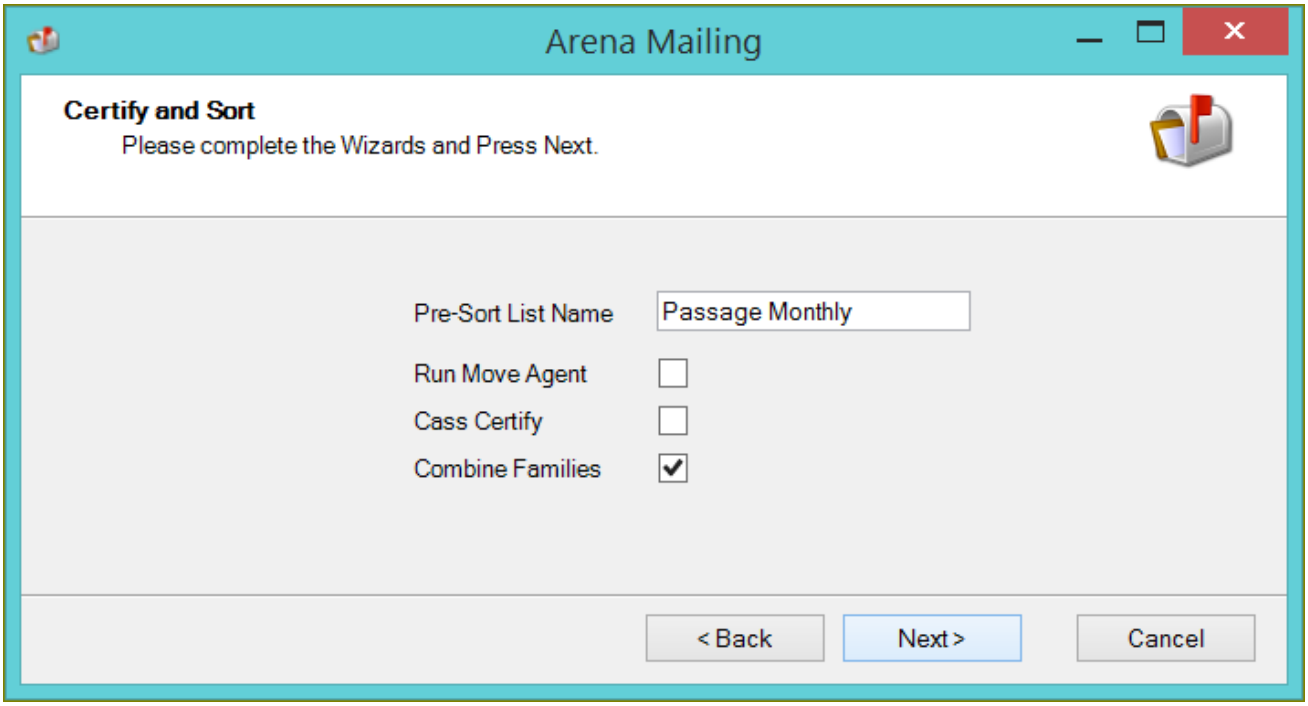


3. Select the records to include in this mailing, either **All Membership** or **From a List**. The Mailing application displays Person and Parent Lists only, in alphabetical order, when choosing the recipients from a mailing list. The option to **Skip Sorting** allows you to skip the bulk mail presort process.

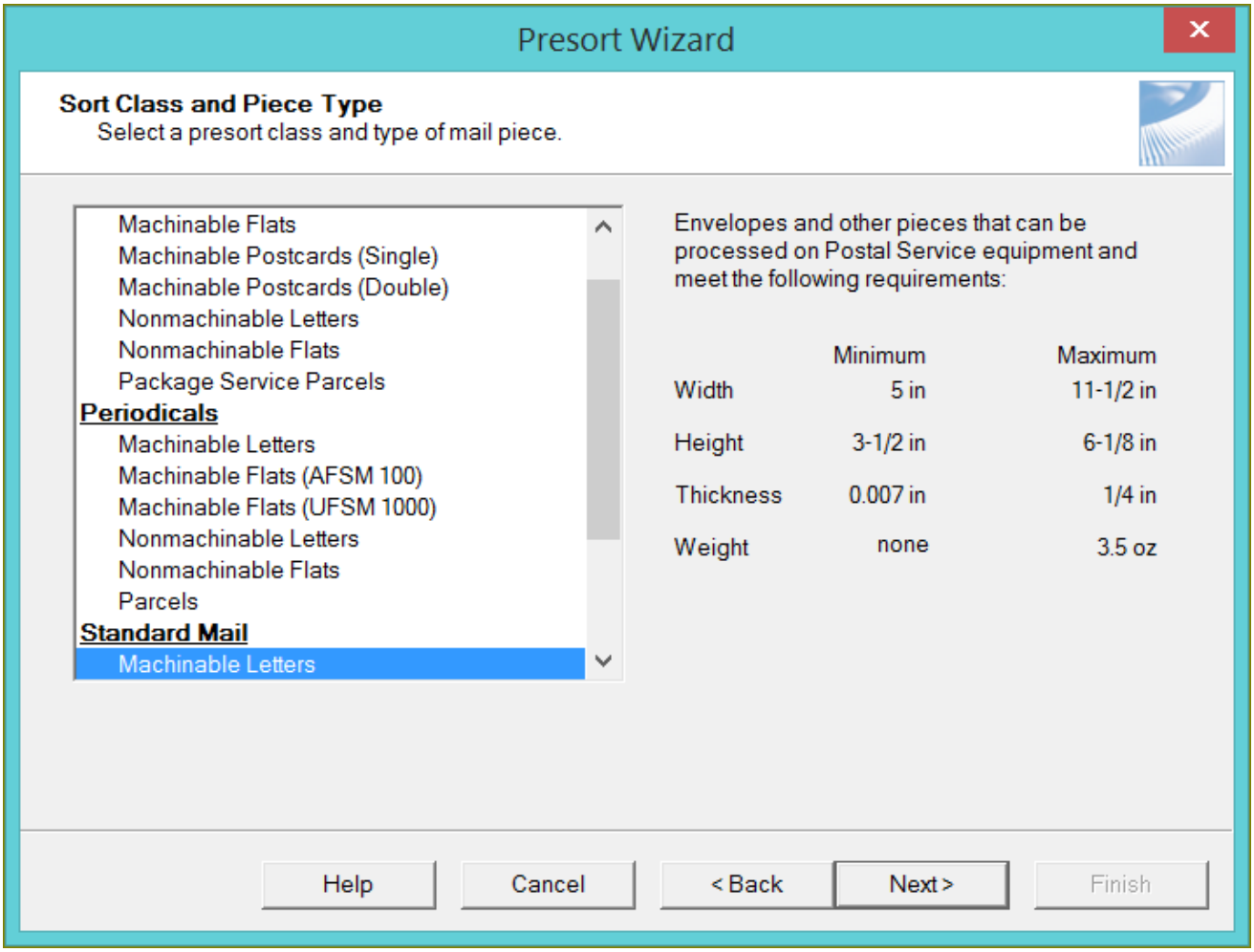


4. Click the **Next** button.

5. Enter a **Pre-Sort List Name** and select additional options.

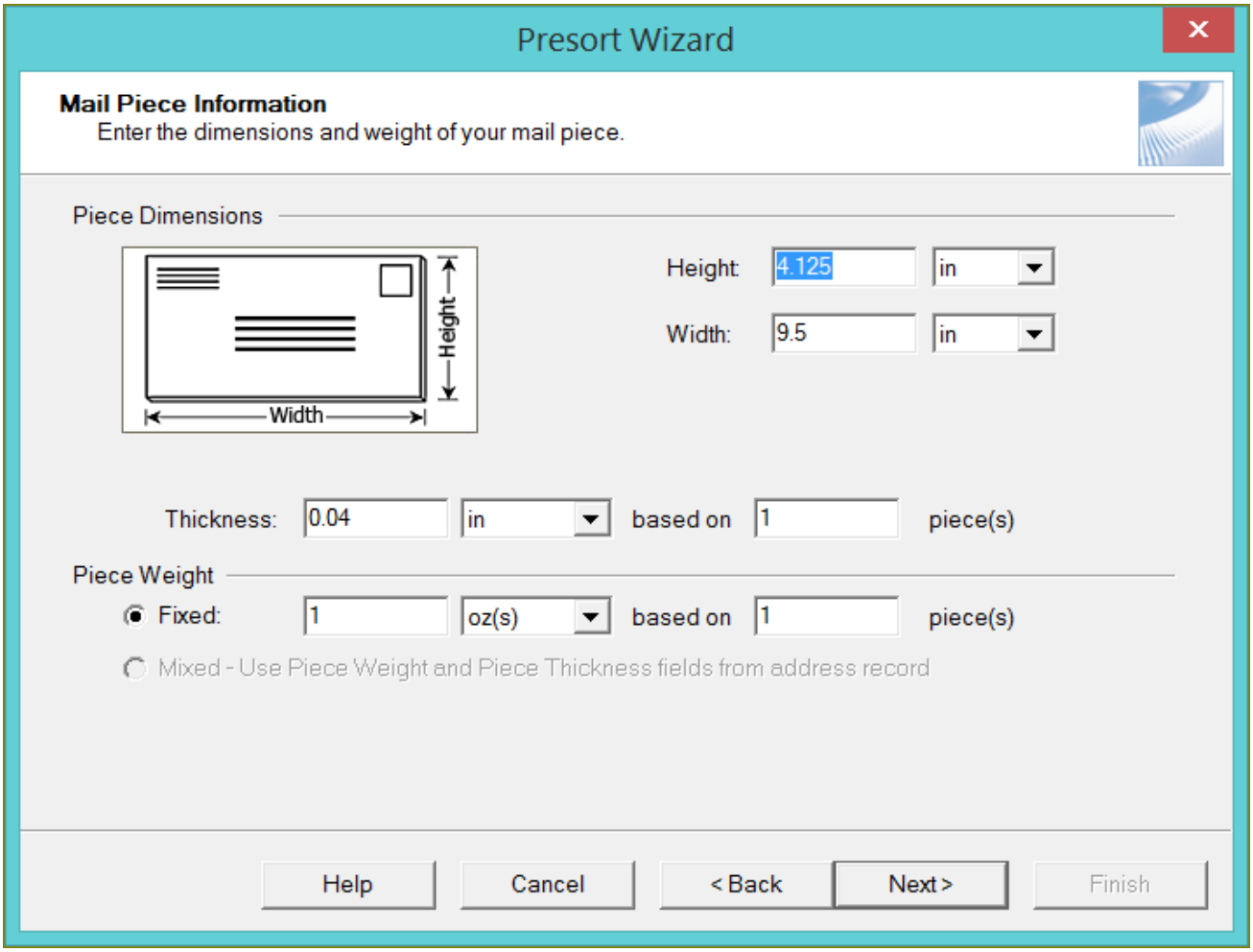


6. **Run Move Agent** – This updates all records based on the most recent Shelby Mailroom DVD update. At least 100 records are required. When you select Run Move Agent, Arena automatically selects Cass Certify.
   - **CASS Certify** – This certifies all selected addresses based upon the most recent Shelby Mailroom update. There is no minimum or maximum number to CASS Certify. If you elect the **CASS Certify** option, the Address Correction window displays while running the correction process.
   - **Combine Families** – This option combines the mailer for all individuals living at the same address.
7. Select or create a sort template, if applicable for this mailing.
8. Select Sort Class and Piece Type.



9. Click the **Next** button.

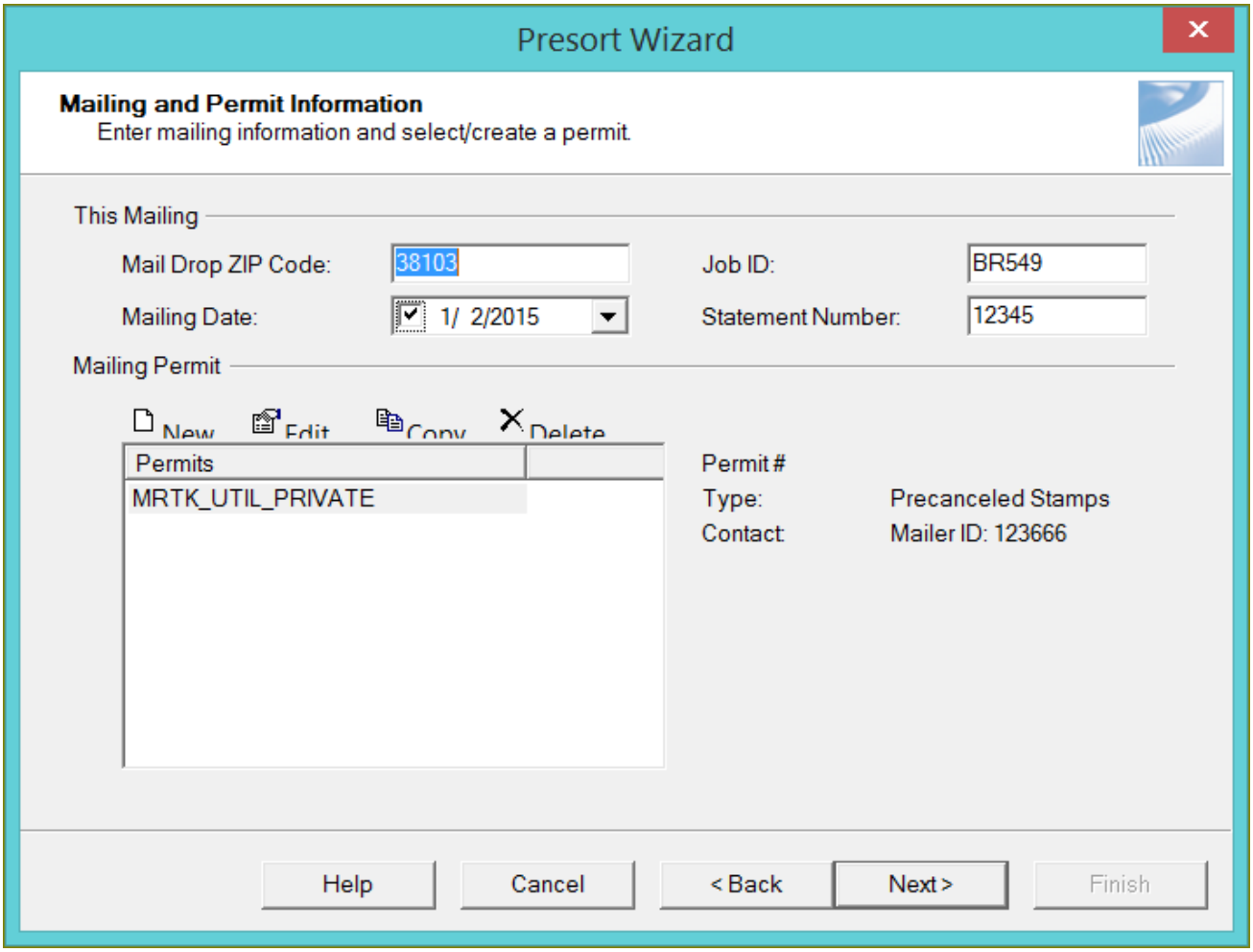
10. Select **Mail Piece Information**.



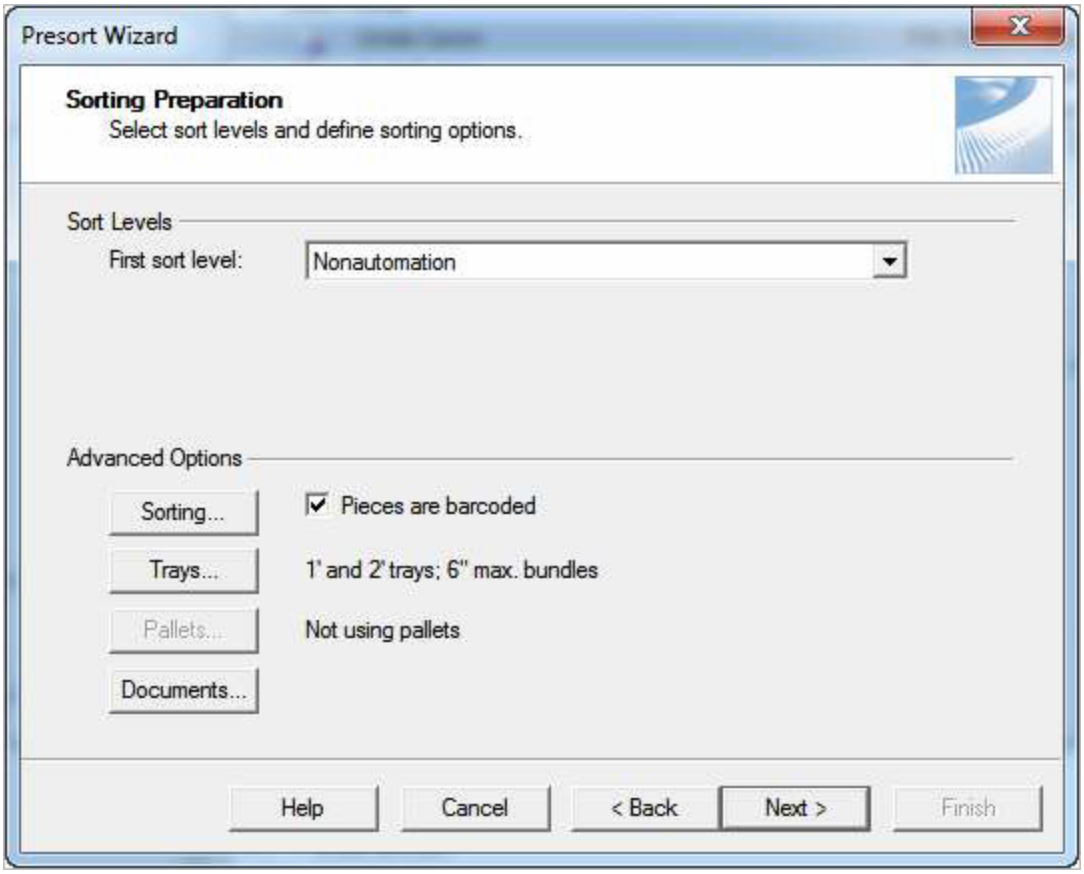
11. Click the **Next** button.

12. Select **Mailing and Permit Information**.

13. Click the **Next** button.

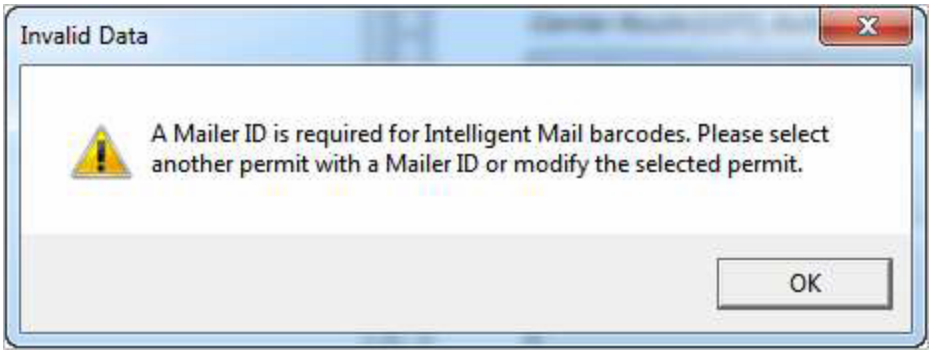


14. Select **Sorting** option. Available sort options are Carrier Route (simplified addressing), Carrier Route (WS), Carrier Route (LOT), Automation and Non-automation. A Mailer ID is required for Intelligent Mail barcodes.

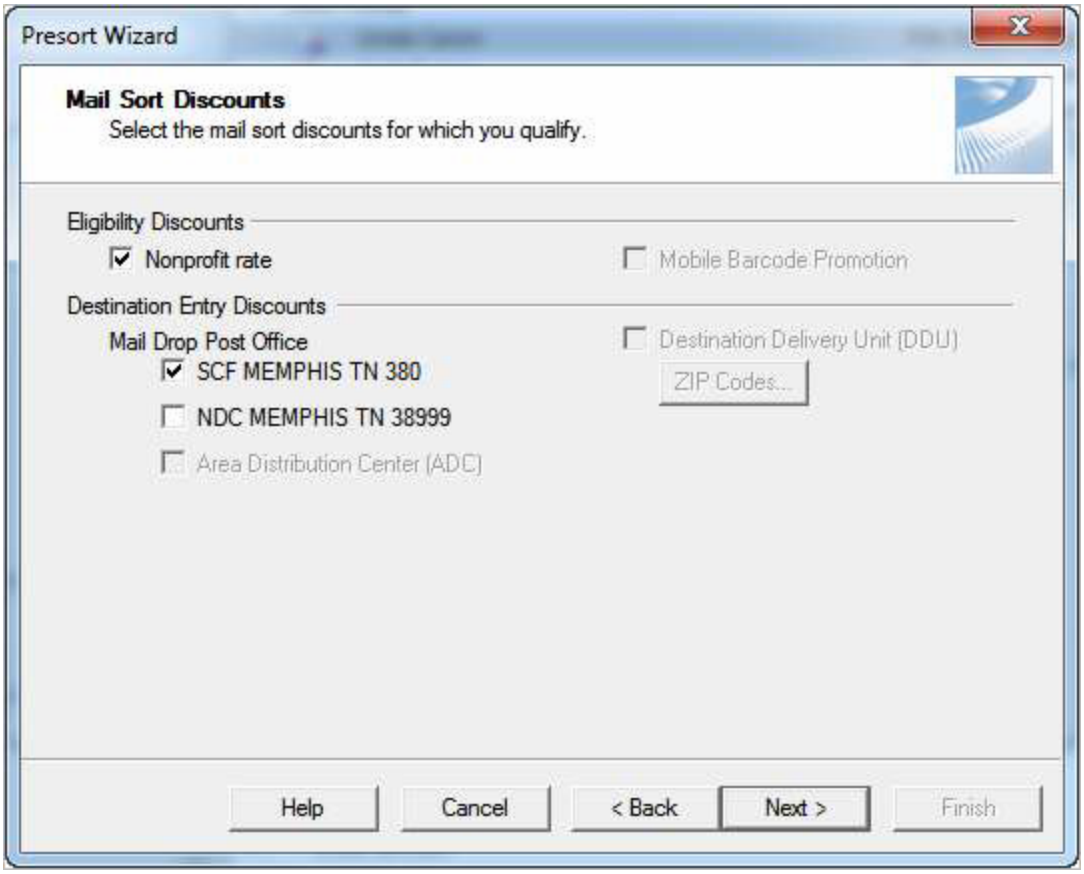


15. Click the **Next** button.

16. If you select **Pieces are barcoded** and the permit does not include a Mailer ID, the below window displays.

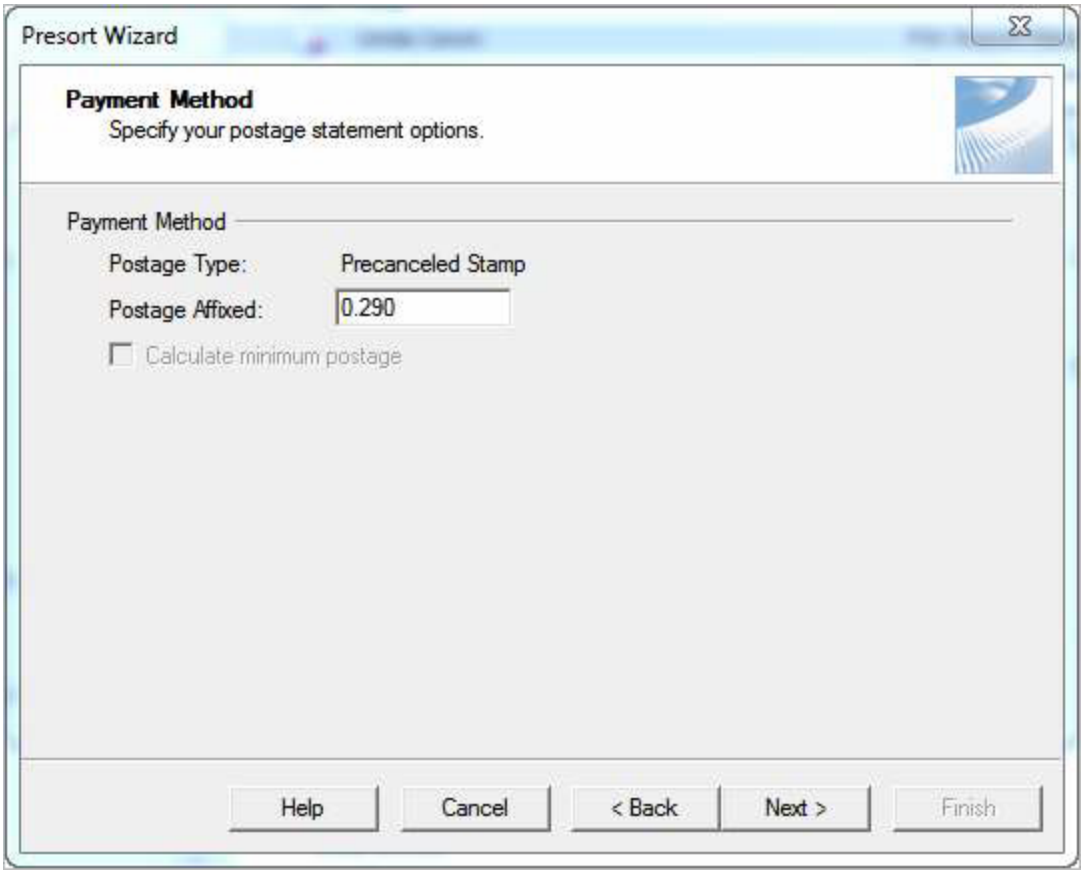


17. Select **Mail Sort Discounts**.



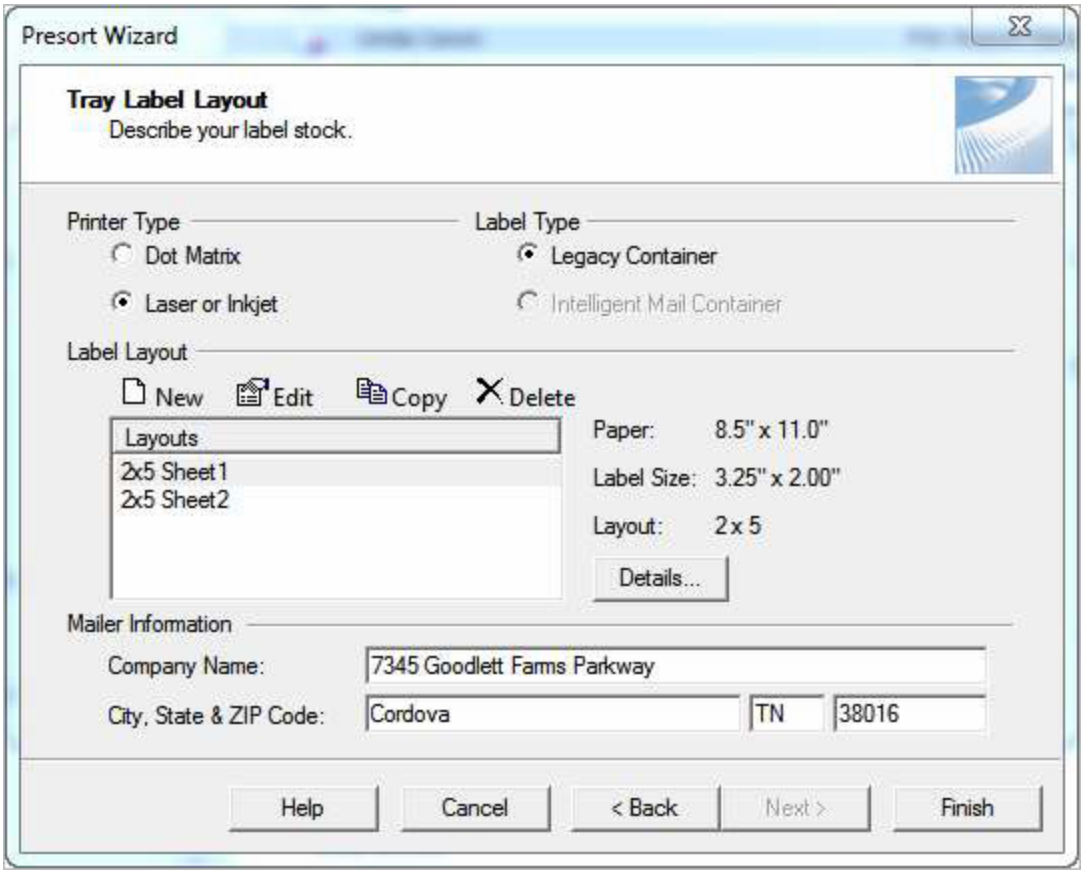
18. Click the **Next** button.

19. Enter the affixed postage value.

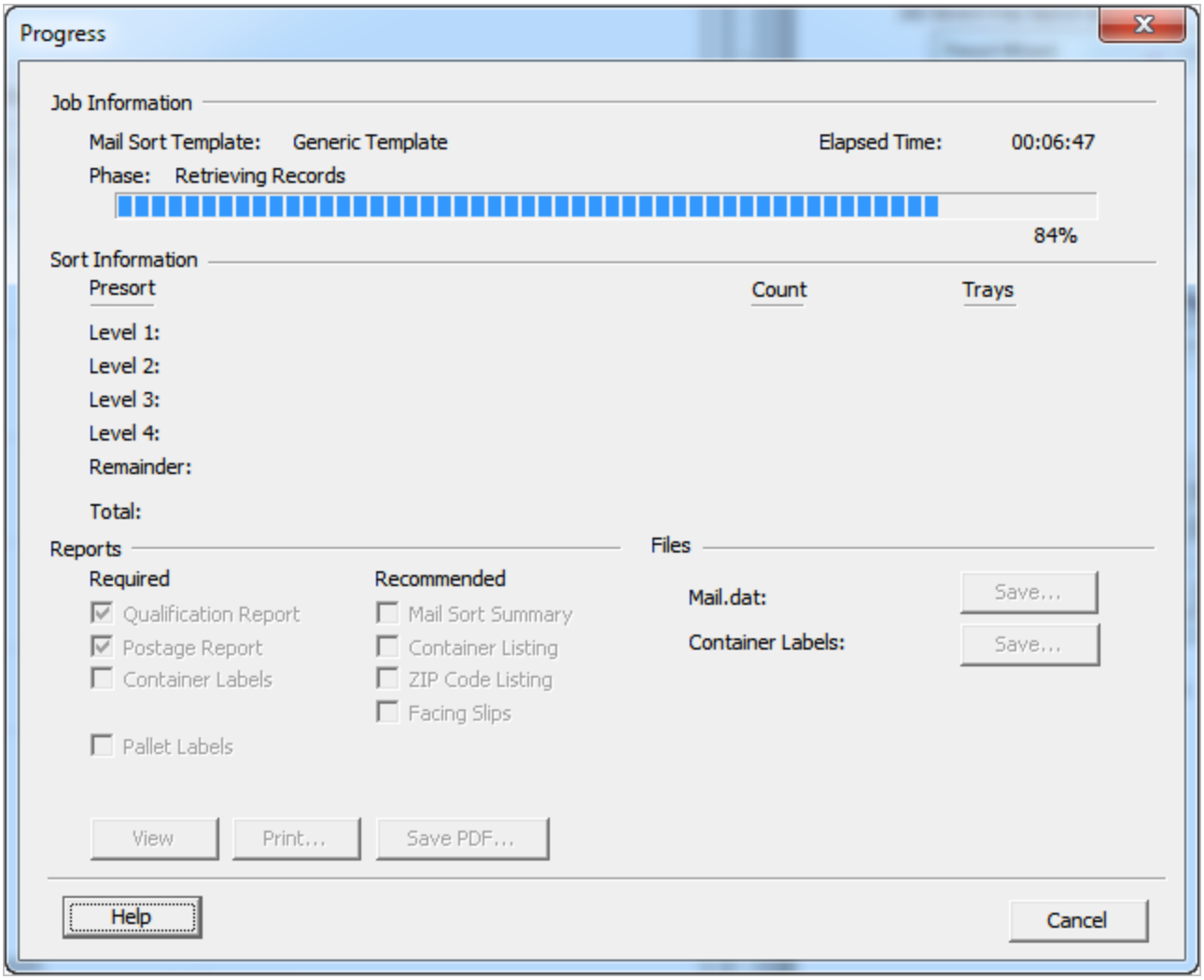


20. Click the **Next** button.

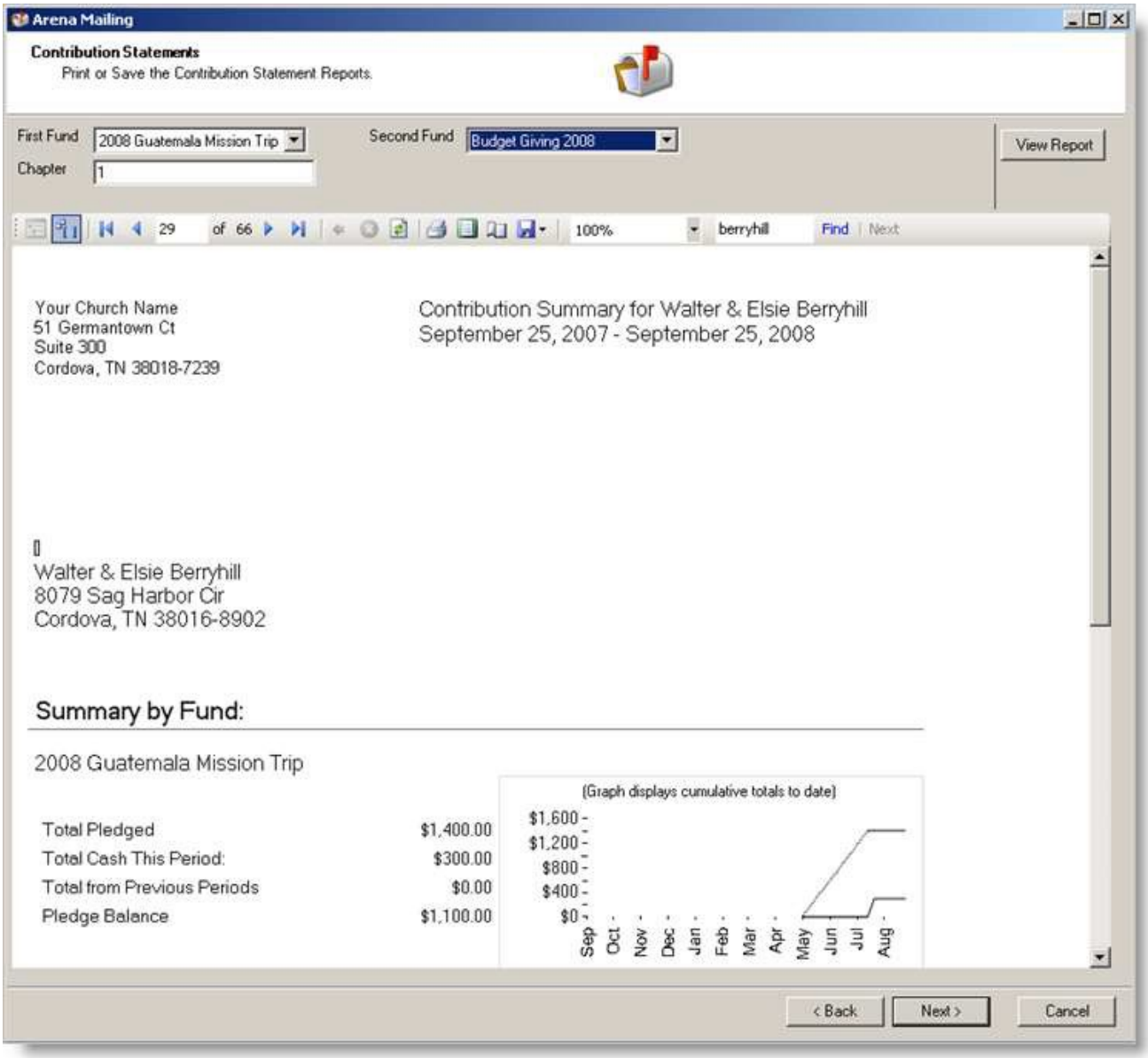
21. Enter **Tray Label Layout** information.



22. The Progress window displays.



23. You can then view, print and/or save the report.


Arena Mailing
Contribution Statements
Print or Save the Contribution Statement Reports.
First Fund
2008 Guatemala Mission Trip
Second Fund
Budget Giving 2008
View Report
Chapter
1
29
of 66
100%
berryhill
Find
Next
Your Church Name
51 Germantown Ct
Suite 300
Cordova, TN 38018-7239
Contribution Summary for Walter & Elsie Berryhill
September 25, 2007 - September 25, 2008
Walter & Elsie Berryhill
8079 Sag Harbor Cir
Cordova, TN 38016-8902
Summary by Fund:
2008 Guatemala Mission Trip
Total Pledged $1,400.00
Total Cash This Period: $300.00
Total from Previous Periods $0.00
Pledge Balance $1,100.00
(Graph displays cumulative totals to date)
$1,600
$1,200
$800
$400
$0
Sep
Oct
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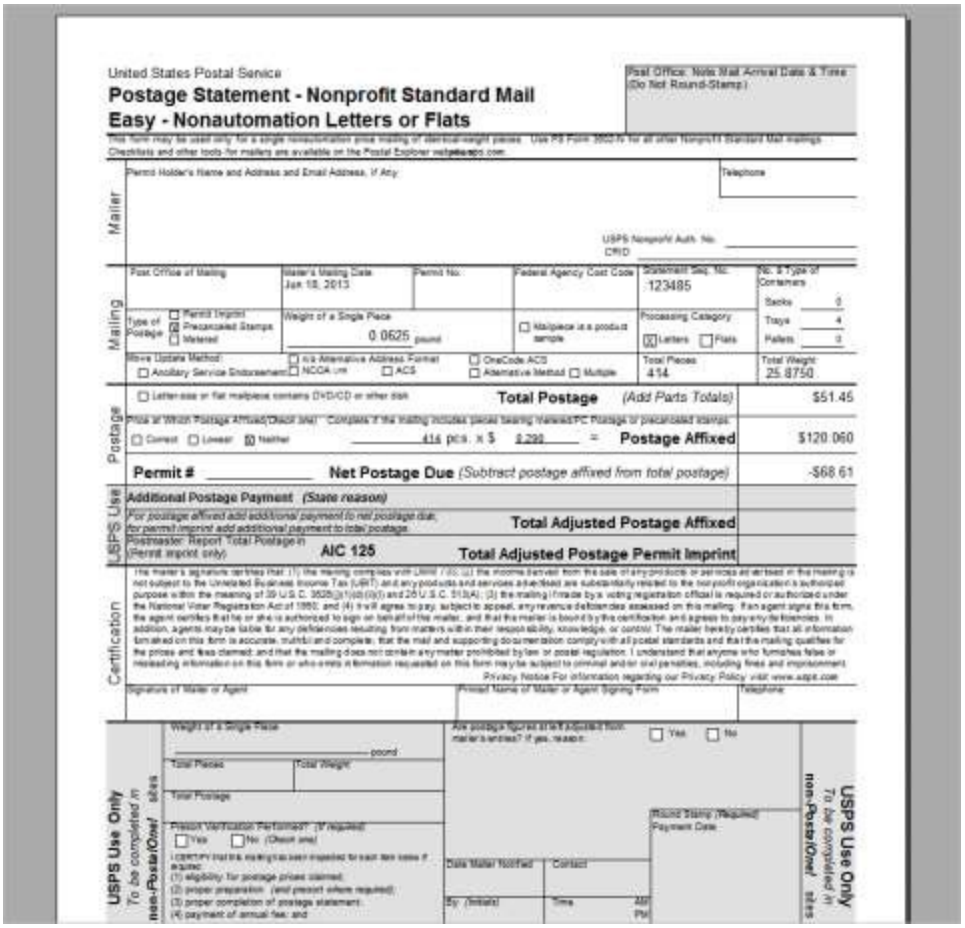
Apr
May
Jun
Jul
Aug
< Back
Next >
Cancel



United States Postal Service

Postage Statement - Nonprofit Standard Mail

Easy - Nonautomation Letters or Flats

Post Office: Note Mail Arrival Date & Time (Do Not Round-Stamp)

Mailer

Permit Holder's Name and Address and Email Address, if Any:

Telephone

USPS Nonprofit Auth. No.

CRID

Mailing

Post Office of Mailing	Mailer's Mailing Date	Permit No.	Federal Agency Cost Code	Statement Seq. No.	No. & Type of Containers
	Jun 18, 2013			123485	Sacks 0 / Trays 4 / Pallets 0

Type of Postage: ☐ Permit Imprint ☒ Precanceled Stamps ☐ Metered

Weight of a Single Piece: 0.0625 pound

☐ Mailpiece is a product sample

Processing Category: ☒ Letters ☐ Flats

Move Update Method: ☐ Ancillary Service Endorsement ☐ ILS Alternative Address Format ☐ NCOA LIN ☐ ACS ☐ OneCode ACS ☐ Alternative Method ☐ Multiple

Total Pieces: 414

Total Weight: 25.8750

Postage

☐ Letter-size or flat mailpiece contains DVD/CD or other disk

Total Postage *(Add Parts Totals)* $51.45

Price at Which Postage Affixed (Check one): Complete if the mailing includes pieces bearing Nonprofit PC Postage or precanceled stamps.

☐ Correct ☐ Lower ☒ Neither 414 pcs. x $ 0.290 = **Postage Affixed** $120.060

Permit # _____ **Net Postage Due** *(Subtract postage affixed from total postage)* -$68.61

USPS Use

Additional Postage Payment *(State reason)*

For postage affixed add additional payment to net postage due; for permit imprint add additional payment to total postage.

Total Adjusted Postage Affixed

Postmaster: Report Total Postage in (Permit imprint only) **AIC 125** **Total Adjusted Postage Permit Imprint**

Certification

The mailer's signature certifies that: (1) the mailing complies with DMM 705.3.2; (2) the income derived from the sale of any products or services advertised in the mailing is not subject to the Unrelated Business Income Tax (UBIT) and any products and services advertised are substantially related to the nonprofit organization's authorized purpose within the meaning of 39 U.S.C. 3626(j)(1)(B)(ii) and 26 U.S.C. 513(A); (3) the mailing if made by a voting registration official is required or authorized under the National Voter Registration Act of 1993; and (4) he/she agrees to pay, subject to appeal, any revenue deficiencies assessed on this mailing. If an agent signs this form, the agent certifies that he or she is authorized to sign on behalf of the mailer, and that the mailer is bound by this certification and agrees to pay any deficiencies. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control. The mailer hereby certifies that all information furnished on this form is accurate, truthful and complete; that the mail and supporting documentation comply with all postal standards and that the mailing qualifies for the prices and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation. I understand that anyone who furnishes false or misleading information on this form or who omits information requested on this form may be subject to criminal and/or civil penalties, including fines and imprisonment.

Privacy Notice: For information regarding our Privacy Policy, visit www.usps.com

Signature of Mailer or Agent | Printed Name of Mailer or Agent Signing Form | Telephone

USPS Use Only — To be completed in non-Postal/Onet sites

Weight of a Single Piece _____ pound

Total Pieces | Total Weight

Total Postage

Postal Verification Performed? (If required) ☐ Yes ☐ No (Check one)

I CERTIFY that the mailing has been inspected for each item name if required:
(1) eligibility for postage prices claimed;
(2) proper preparation (and presort where required);
(3) proper completion of postage statement;
(4) payment of annual fee; and

Are postage figures and/or adjusted from mailer's entries? If yes, reason: ☐ Yes ☐ No

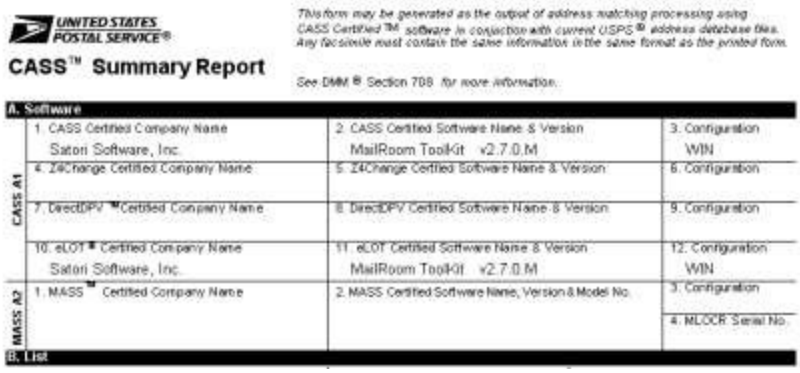
Round Stamp (Required) Payment Date

Date Mailer Notified | Contact

By (Initials) | Time AM PM

USPS Use Only — To be completed in non-Postal/Onet sites

24. If you select the **CASS Certify** option, you also have the option to print the summary report.



UNITED STATES POSTAL SERVICE®

CASS™ Summary Report

This form may be generated as the output of address matching processing using CASS Certified™ software in conjunction with current USPS® address database files. Any facsimile must contain the same information in the same format as the printed form.

See DMM® Section 708 for more information.

A. Software

CASS A1	1. CASS Certified Company Name: Satori Software, Inc.	2. CASS Certified Software Name & Version: MailRoom ToolKit v2.7.0.M	3. Configuration: WIN
	4. ZiChange Certified Company Name	5. ZiChange Certified Software Name & Version	6. Configuration
	7. DirectDPV™ Certified Company Name	8. DirectDPV Certified Software Name & Version	9. Configuration
	10. eLOT® Certified Company Name: Satori Software, Inc.	11. eLOT Certified Software Name & Version: MailRoom ToolKit v2.7.0.M	12. Configuration: WIN
MASS A2	1. MASS™ Certified Company Name	2. MASS Certified Software Name, Version & Model No.	3. Configuration
			4. MLOCR Serial No.

B. List

25. Click the **Close** button to exit the Mailing application.

Public Lists and My Lists

Use the **My List** and **Public List** pages to create lists by selecting desired criterion that results in a list of records that meet the selected criterion. Lists always display as a columnar format. Lists you

create on the **My List** page are accessible to only the current user who creates the list. Lists you create on the **Public List** page are accessible to all users who have access to the **Public List** page. You can change Public and My Lists to display on either page. You can also copy a Public or My List. Copied lists are independent from the original list, regardless if displayed on the **My** or **Public List** page. (NOTE: My Lists are specific to the user name who creates the list. If the User Name is changed, My Lists created for the 'old' user may not be available.)

Group your Lists by Category

To use the category features, follow the steps below:

1. From either the **My Lists** or **Public Lists** pages, click the ***Edit Settings...*** link to access the **Module Settings** window.
2. Scroll to the bottom and select "True" for the **Show Category Selector** option. Click the **Save** button and then click the **Done** button.
3. From the **Administration** menu, select the **Lookups** option.
4. Click the ***List Category*** link and add your desired Categories.
5. From either the **My Lists** or **Public Lists** pages, click the ***Edit Settings...*** link to access the **Module Settings** window.
6. Scroll to the bottom and click the **Search** button in the **Specific Category Limitation** option. Select the default category in the **Lookup Values** box. This is the category that defaults when you add a new list. Click the OK button when you are done.
7. Remember to click the **Save** button and then click the **Done** button on the **Module Settings** window.

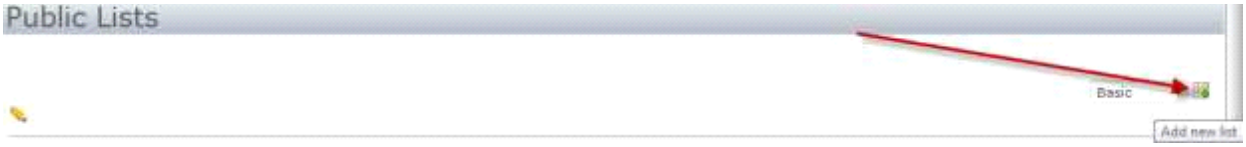
You can create lists by choosing desired criterion that results in a list of names who meet the selected criterion. Once the list displays, you can merge records with existing documents or reports, bulk update selected records, send an email or SMS text message, create labels, or export to Excel.

For each list you create, you can use either the **Basic** or the **Advanced List** option. Basic lists use the **AND** logic whereby records must meet each criterion you select. Whereas, the **Advanced List** option gives you the option to select either the **AND** or **OR** logic for each criteria. For either list, the more criterion you select, the narrower the results are for the list.

Create a New Basic List

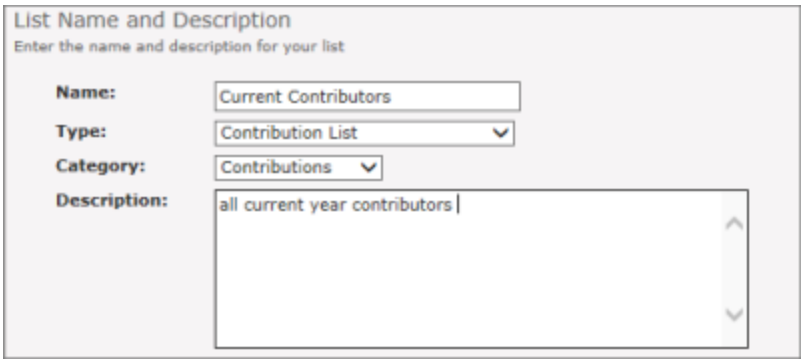
1. From the **Membership** menu, click the **Public Lists** or **My Lists** option.

2. Click the **Add New List** icon to create a new list.



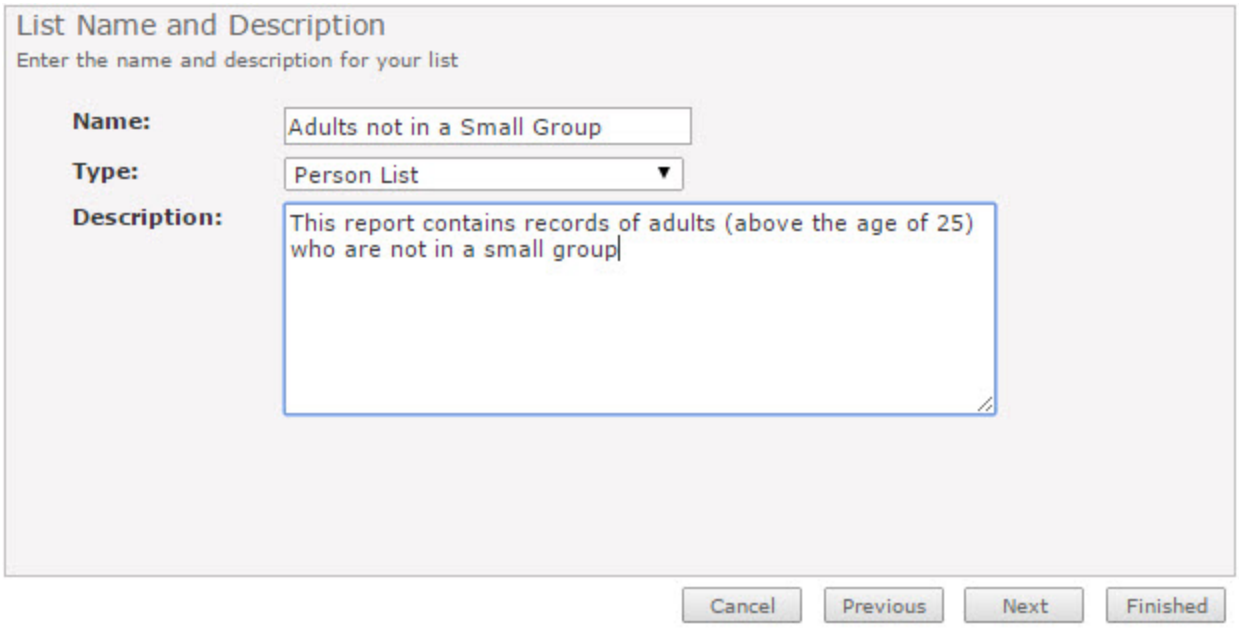
3. Enter a **Report Name**.

4. Select a **Report Type**. Options are Computer Systems, Contribution, Group, Parent and Person List. Use Contribution Lists to run lists specific to Contributions. The steps to create lists are the same as My and Public Lists. The only exception is the List Type is set to Contributions.



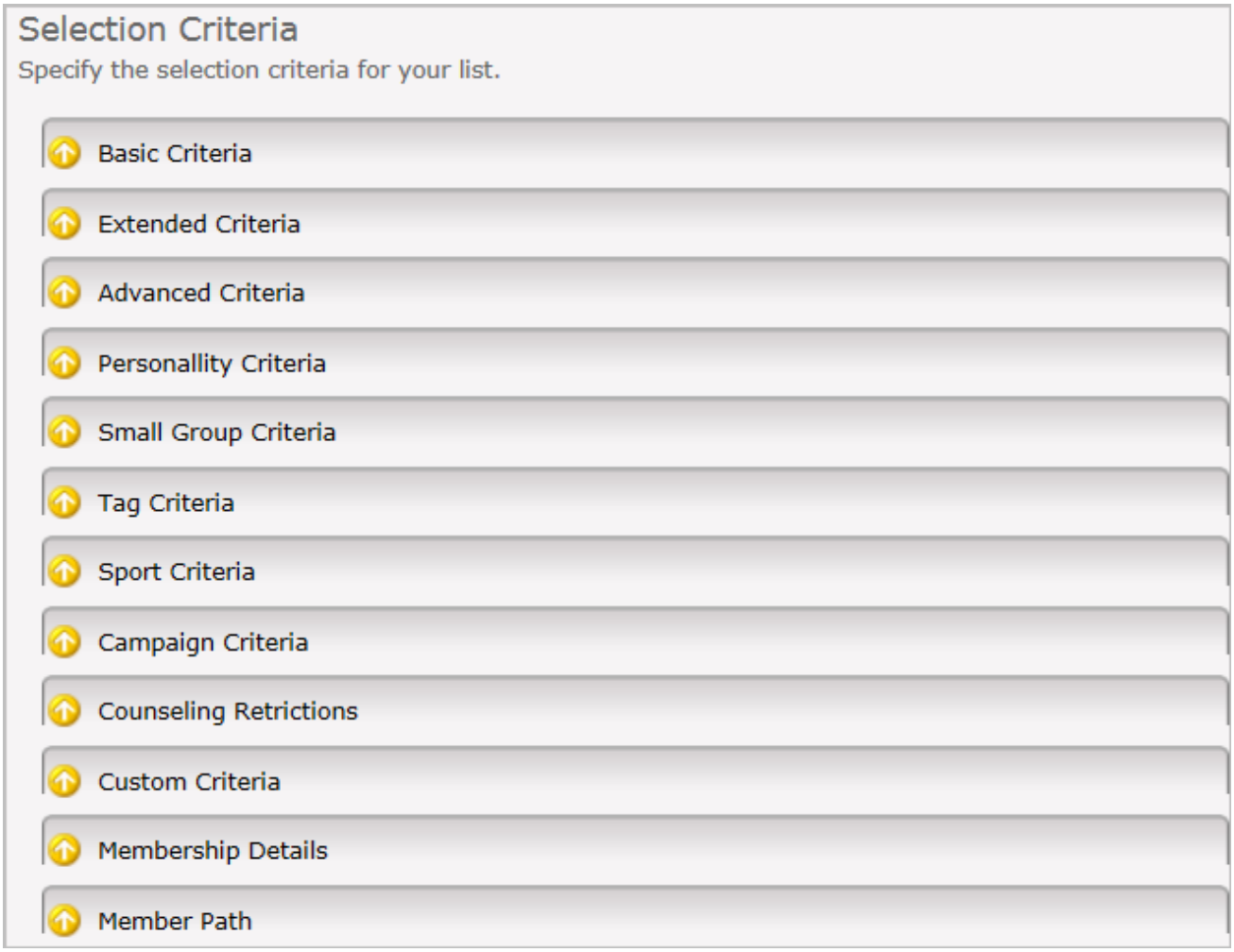
5. Select a **Category**, if available.

6. Enter a **Description** that adequately describes this List.



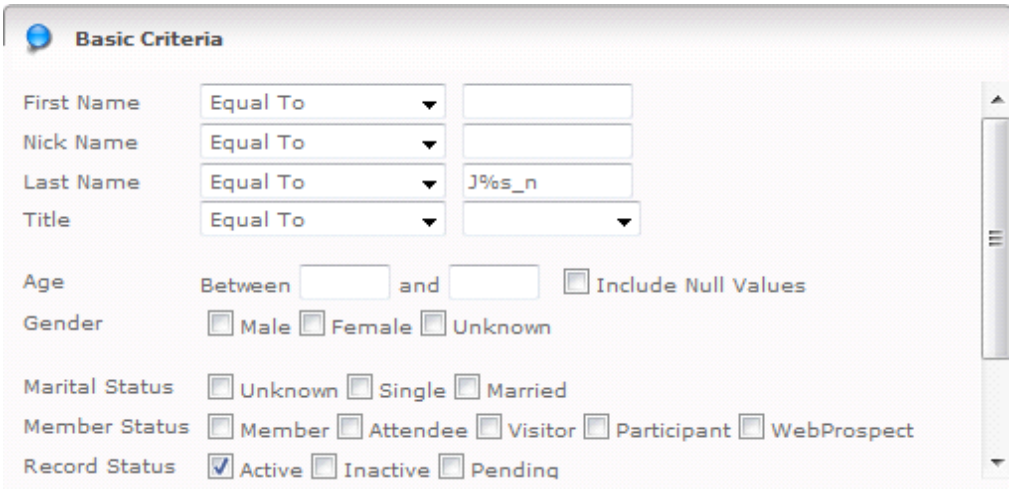
7. Click the **Next** button.

8. Click the **Criteria Group Expand** icon to expand the section and select your criteria. Ask yourself, "Who do I want on this list?" The answer to this question helps you select the criteria. Available sections and criteria may vary for your organization. Criterion differs by Report Type.



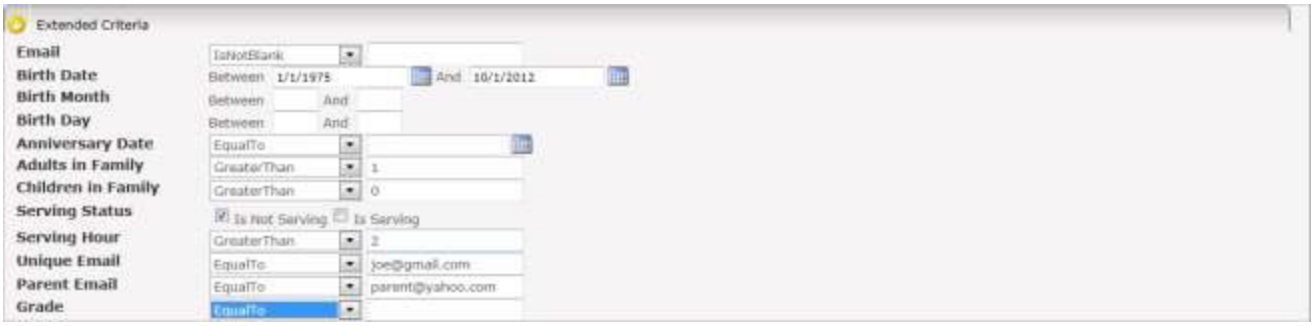
Basic Criteria

This section displays personal information. Criteria options may vary for your organization. You can use the % and_ wildcards in some fields. Use the Null Values to include records that do not meet the selected criteria or the field is blank.



Extended Criteria

This section displays individual and family information. You can enter .5 in the Serving Hour box to represent ½ hour.

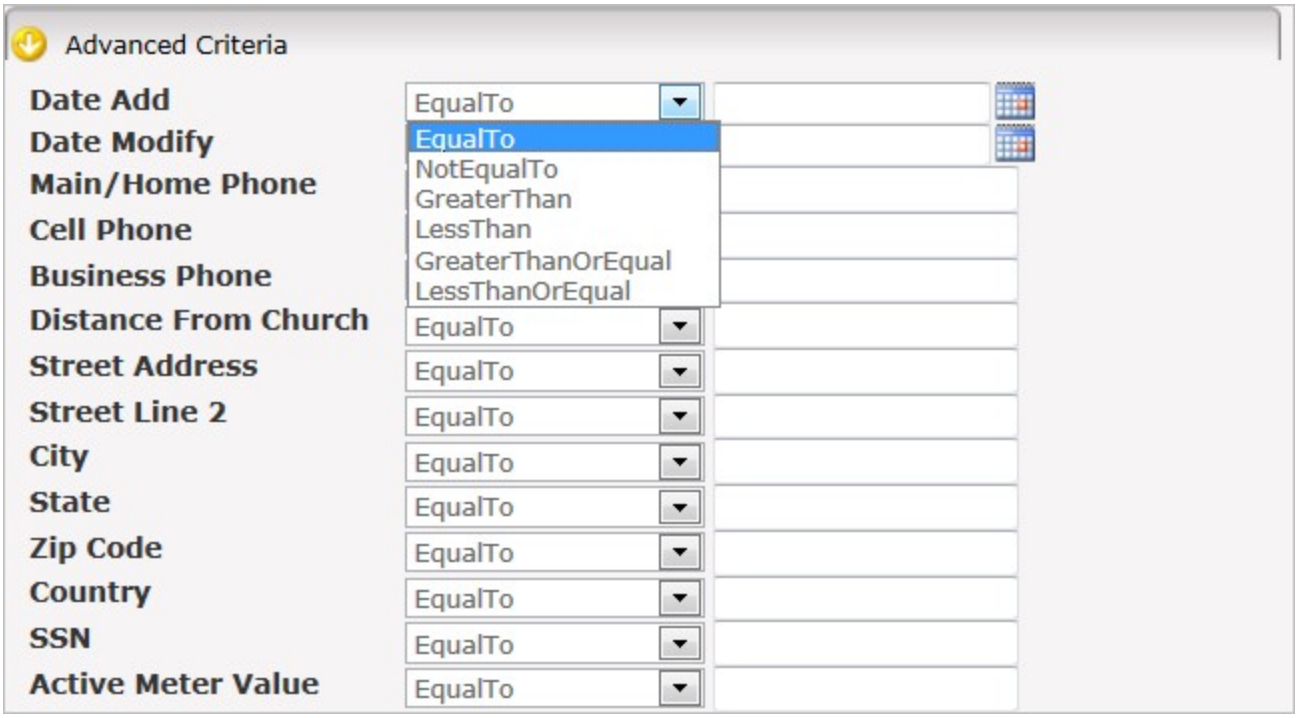


- **Email** – You can search for an exact email or a portion of an email, but using the search parameter drop down.
- **Birthdate** – To search on an exact date, put that date in both boxes. To search on a range, enter the earliest date in the first box and the latest date in the second.
- **Birth Month** – To search on an exact month, put that number in both boxes. To search on a month range, enter the earliest month in the first box and the latest month in the second. If you want a month greater than a number then enter that number in the first box, leaving the second blank.
- **Birth Day** – To search on an exact day, put that number in both boxes. To search on a day range, enter the low number in the first box and the high number in the second. If you want a day greater than a number then enter that number in the first box, leaving the second blank.
- **Anniversary Date** – Use this option to search by wedding anniversary date. A complete **MMDDYYYY** date format is required. If the year is not available, consider using a default year such as 1900.

- **Adults** – Use this option to search for records with family role "Adults".
- **Children in Family** – Use this option to search for households with a specific number of records marked "Child" for family role.
- **Serving Status** – Use this option to search for individuals who are active in a Serving Tag.
- **Serving Hour** – Use this option to search for individuals who are active in a Serving Tag and serving a specific number of hours. You can enter .5 in the Serving Hour box to represent ½ hour.

Advanced Criteria

This section displays additional demographic criterion.



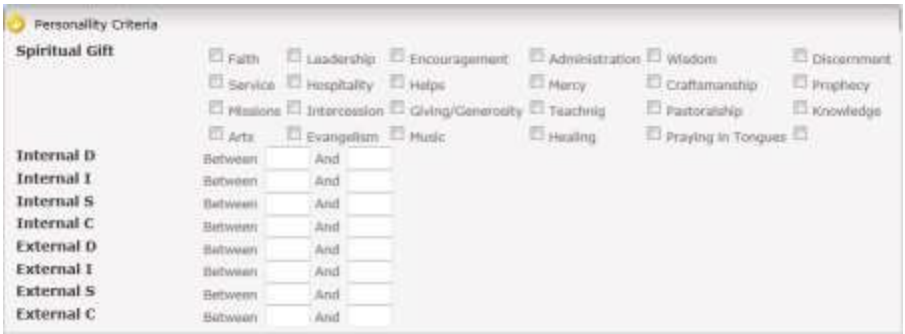
- **Date Add** – Select an option from the drop-down and enter a date in **MMDDYY** or **MMDDYYYY** format or click the **Calendar** icon to select a date. Drop-down options are equal to, not equal to, greater than, less than, greater than or equal, and less than or equal. Consider using this criterion to search for new records.
- **Date Modify** – Select an option from the drop-down and enter a date in **MMDDYY** or **MMDDYYYY** format or click the **Calendar** icon to select a date. Drop-down options are equal to, not equal to, greater than, less than, greater than or equal, and less than or equal.
- **Main/Home Phone** – Select an option from the drop-down and optionally enter any part of the phone number. Drop-down options are equal to, not equal to, starts with, like, is blank or is not blank. Consider using this criterion to search for records with missing phone

numbers prior to adding to a calling campaign.

- **Distance From Organization** – Select an option from the drop-down and enter a distance (in miles), to search for all people who live that distance to or from your organization. Arena searches all addresses that have been geocoded, if your organization subscribes to this service. Drop-down options are equal to, not equal to, greater than, less than, greater than or equal, and less than or equal.
- **Address Fields** - Select an option from the drop-down and enter the desired value. Consider using this criterion to search for records with a missing or an incomplete address prior to sending snail mail. Select the street address, city, state and zip where the fields are not blank to verify all records have a complete address.
- **SSN** – Use this criterion to search for records with a specific, partial or blank social security number.
- **Active Meter** – Use this criterion to search for records with a specific or blank activity meter.

Personality Criteria

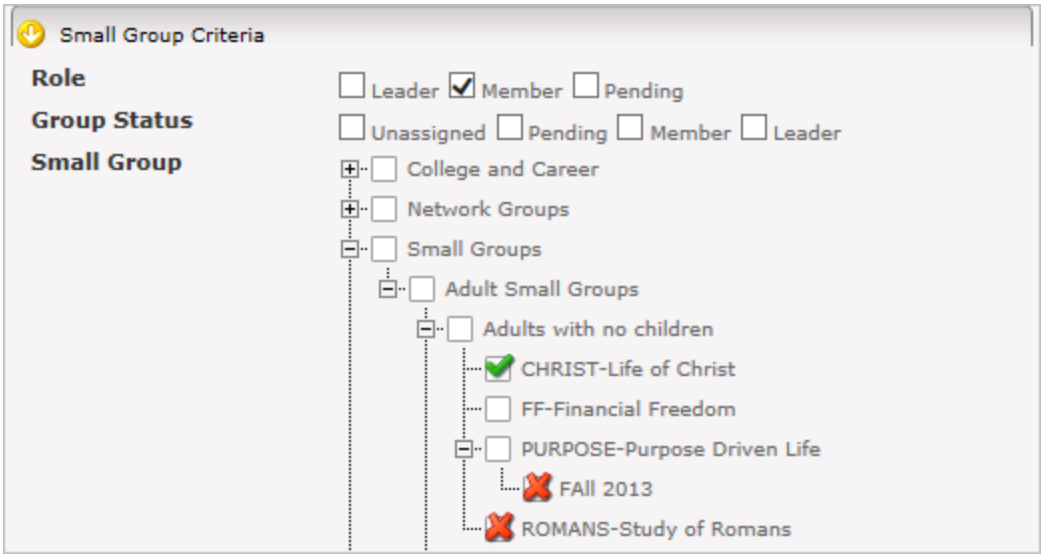
This section displays personality criterion from the Spiritual Gifts and DISC section on the **Person Detail** page.



- **Spiritual Gifts** – These check box options may vary with your organization.
- **DISC Scores** – You can search by DISC scores or a combination of scores. To search by an exact number, enter that number in both boxes. To search using a number range, enter the lowest number in the first box and the highest number in the second. If you want a number greater than another number then enter that number in the first box, leaving the second blank.

Small Group Criteria

This section displays group specific criterion.



Role – This is the role of the member in Groups.

Small Group Status – You can search by Group Status. You can also search by **In a Small Group** or **Not In a Small Group**.

1. Click the **Expand Folder** ⊞ icon to expand and continue selecting or deselecting each group level.

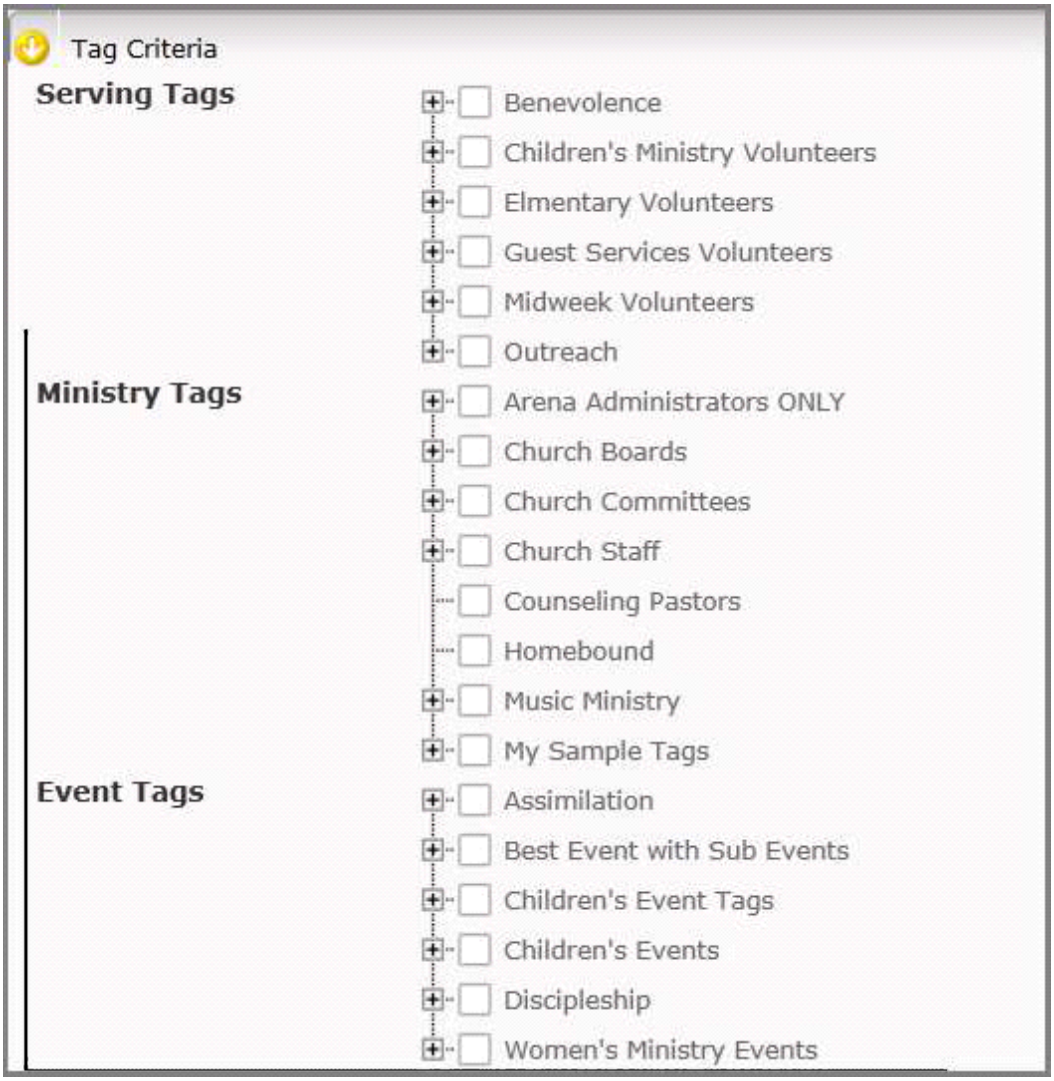
2. Click once to add a **Check Mark** ☑ in a check box to search for people who are in that small group and check all levels under that group.

3. Click twice to change the green check mark to the **Deselect** ✘ icon to search for people who are not in the selected small group. Using the **Deselect** option in Groups and Tags is a useful tool when you need to identify people who are not in a Group, Serving Tag, Ministry Tag, or Event Tag.

A **blank box** ☐ indicates you are not using the group as criteria.

Tag Criteria

Use the **Tag Criteria** tab to search by specific Serving, Ministry and Events.



1. Click the **Expand Folder** ⊞ icon to expand and continue selecting or deselecting each tag level.

2. Click once to add a **checkmark** ✔ icon in a check box to search for people who are in the tag and check all levels under that tag.

3. Click twice to change the green check mark to **Deselect** ✘ to search for people who are not in the selected small group. Using the **Deselect** option in Groups and Tags is a useful tool when you need to identify people who are not in a Group, Serving Tag, Ministry Tag, or Event Tag.

A **blank box** ☐ indicates you are not using the group as criteria.

Sport Criteria

This section displays criterion specific to sports.

Campaign Criteria

This section displays criterion specific to calling campaigns.

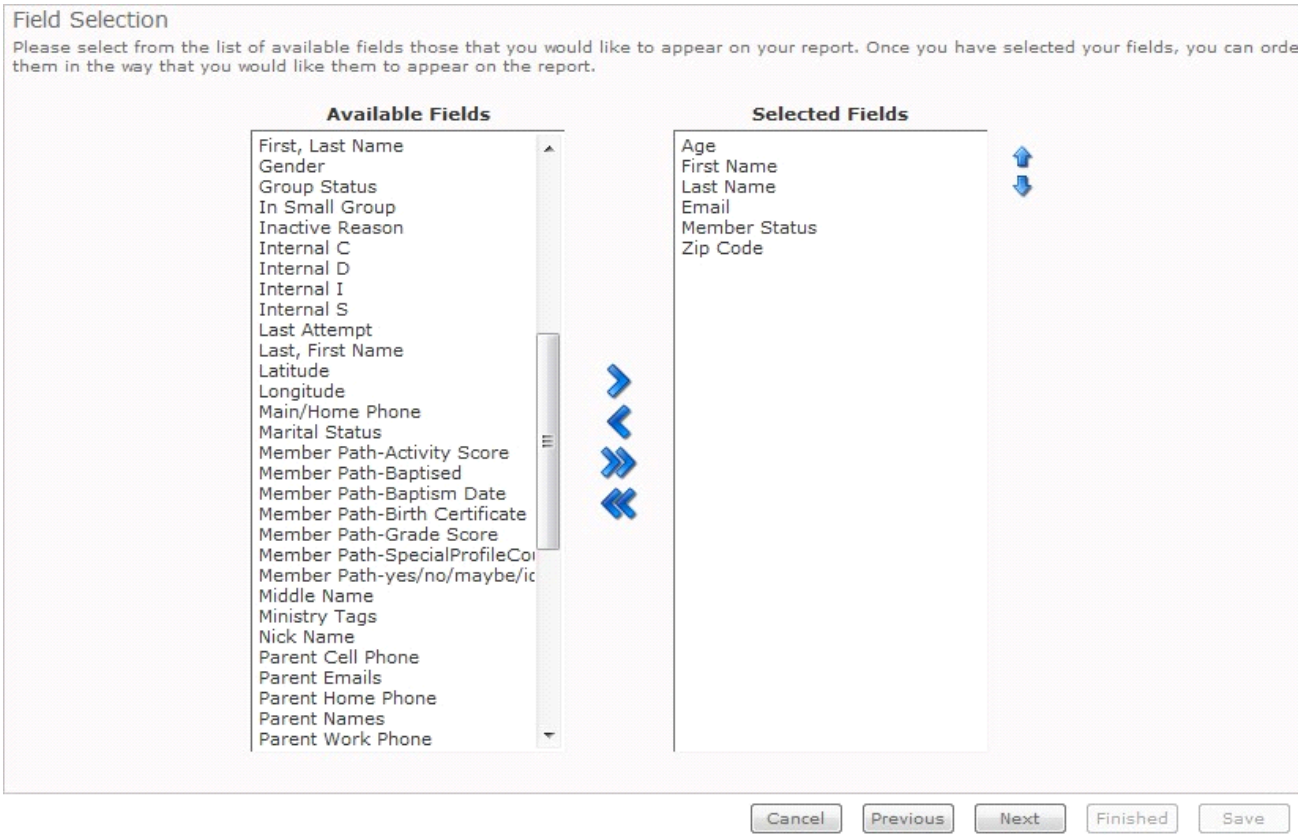
Custom Attributes

By default, this section is blank. If your organization has created custom attributes, see your Arena Administrator.

Creating a Basic List (cont.)

1. Click the **Next** button. You have the option to save the report at any point in the Wizard process.

2. Select what fields to display on the **Field Selection** page. The default fields to display are in the **Selected Fields** column. The available fields you can add to display are in the Available Fields column. If the same field name exists in multiple Attribute Groups, the field name includes the attribute group, such as Member Path-Activity Score, as shown below.

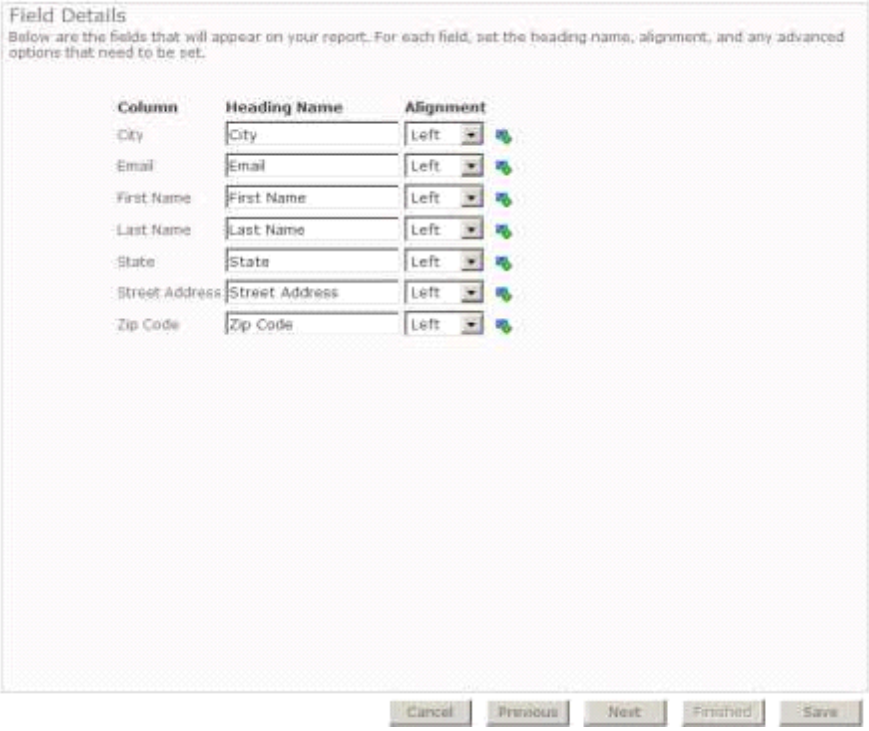


3. Click the **Select** icon to add available fields to the **Selected Fields** column. Press the "Ctrl" key to select multiple fields.

4. Click the **De-Select** icon to remove selected fields. Press the "Ctrl" key to select multiple fields.

5. Click the **Select All** icon to move all available fields to selected fields.

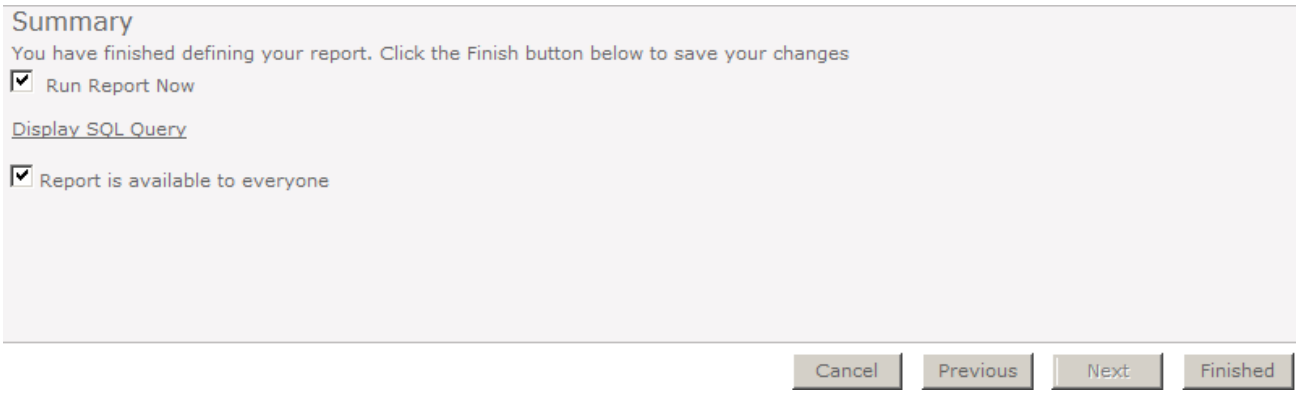
6. Click the **De-Select All** icon to move all selected fields to available fields.
7. Select the fields you would like to display on the final report.
8. Order the selected fields by using the **Change Order** icon to the right of the **Selected Fields** column.
9. Click the **Next** button.
10. Adjust field details.



11. Click the **Next** button.
12. Make sorting selections. Arena allows you to sort by any of the Selected Fields. Default sort options are First Name and Last Name. Click the **Add** button to add other selected fields by which to sort or change the default sort options.

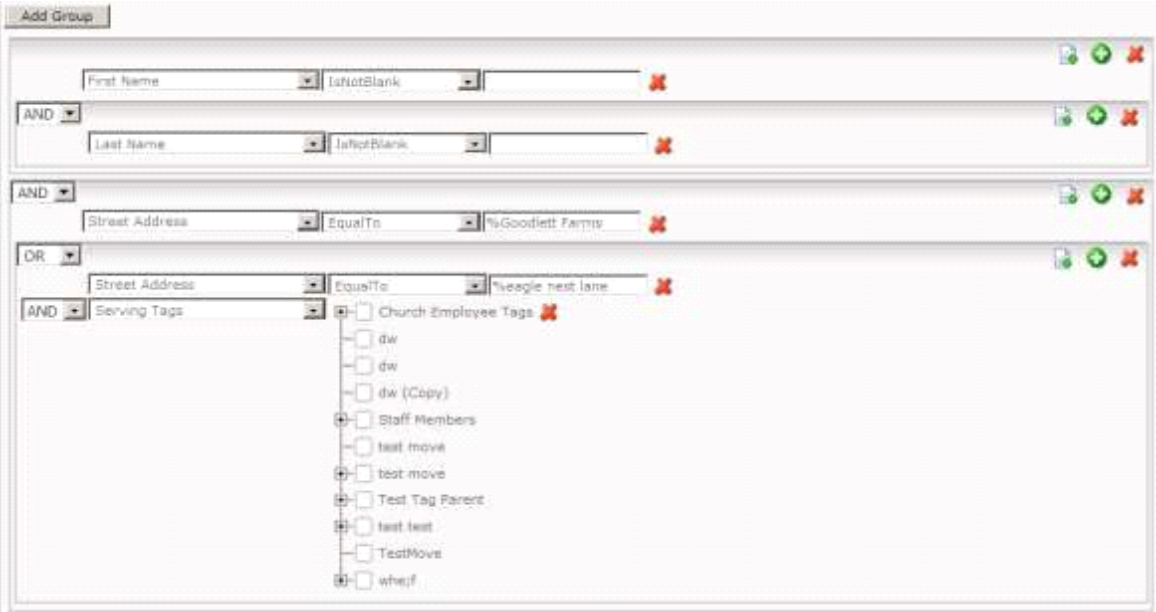
13. Click the **Next** button.

14. Click the **Finished** button to display the list results. If you create the list on the **Public List** page, it is available for all users with permission to this page. If you create the list on the **My List** page, it is available only to the user who creates the list. This is also the page where you can move the list to/from the Public/My List pages. Click the ***Display SQL Query*** link to view the list query.



Advanced Public Lists and My Lists

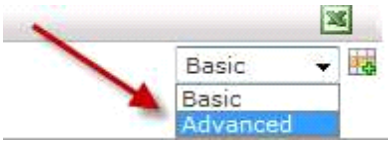
The **Advanced List** option allows you to select Criteria as before, but with the addition of **AND/OR** Boolean logic to use for each criterion (control) and the option to group criteria.



Using Advanced Lists

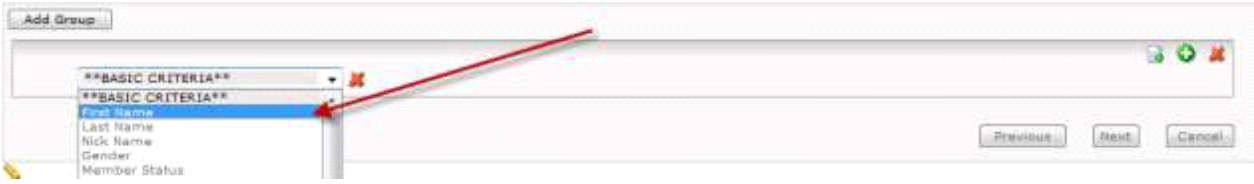
The below steps outline the process for using Boolean logic for criteria selection. You can use the remaining steps as previously outlined in Public Lists and My Lists of this help file.

1. Select **Advanced** List.

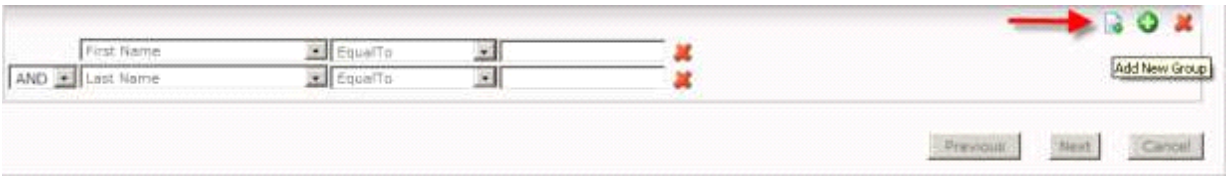


2. Click the **Add Group** button.

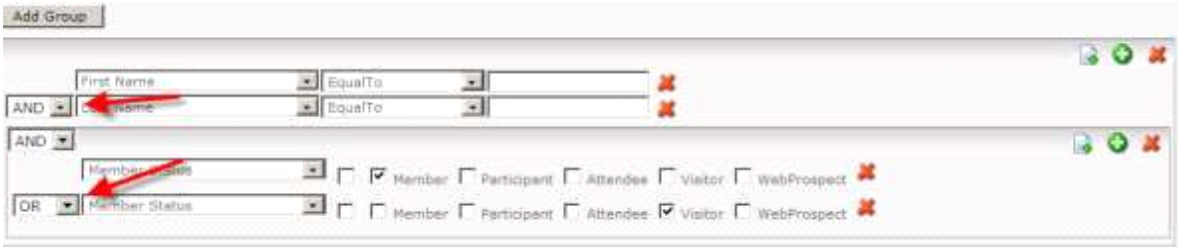
3. Click Select criteria from the criteria Group.



4. Add a second **Control** or **Group**.



5. Once you add at least two controls, you have the option to select either the **AND** or **OR** logic for each criteria.



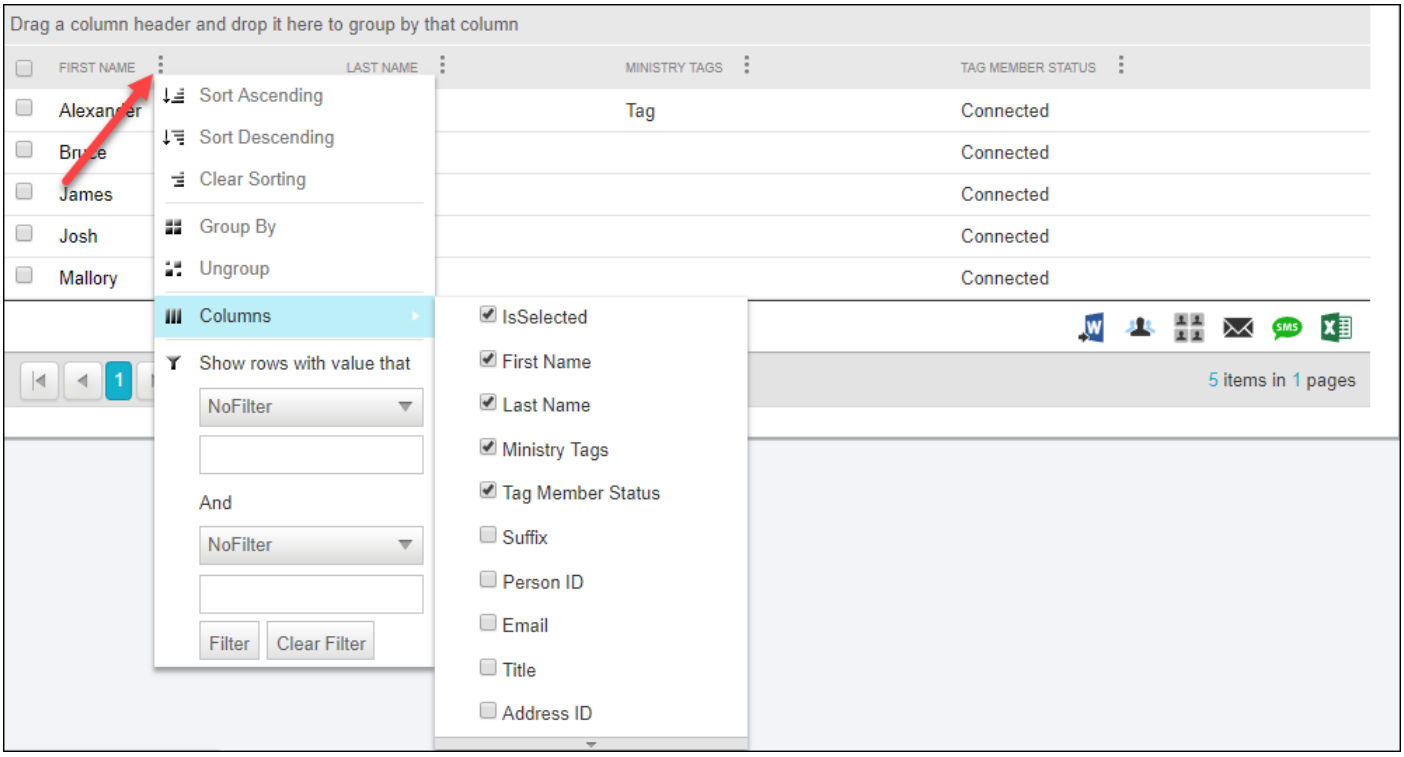
6. Repeat steps 2 through 4 for every control you would like to include in this report.

7. Once you select all criteria, click the **Next** button to continue. (Refer to My Lists of this help file for next steps.)

Completed Lists

On the view list page, all selected criteria displays in a columnar format.

Use the three dot icon ⋮ to access additional features to to easily group, and filter the results, choose the columns to display and more. Use the drag and drop feature to quickly group columns.



1. Click the **Bulk Update** icon to update all the selected records through Person Bulk Update.

2. Click the **Merge Member** icon to merge selected records into one record.

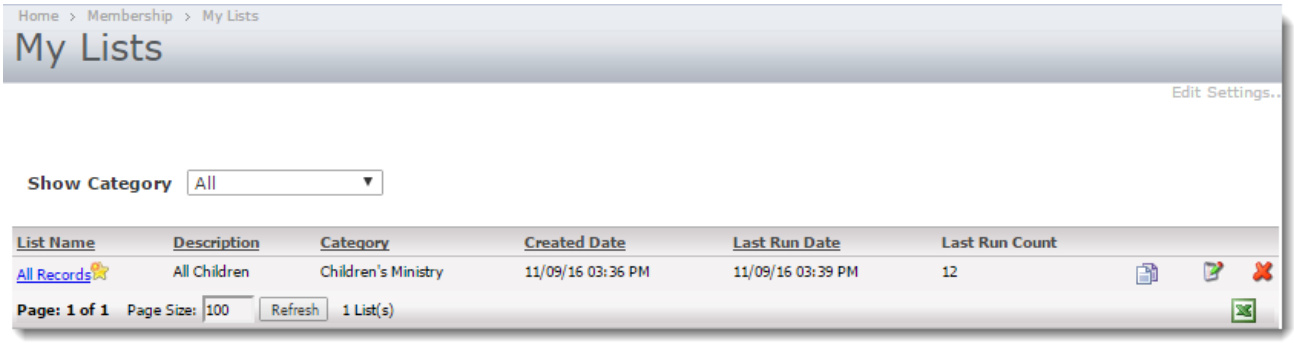
3. Click the **Send Email** icon to send email to the selected names through Arena Communications.

4. Click the **Send SMS Message** icon to send a SMS Message to the selected names.

5. Click the **Word Merge** icon to mail merge the selected names with an available document.

6. Click the **Export to Excel** icon to export selected records to an Excel spreadsheet. When exporting to Excel, all fields from the active page export in addition to required fields. Required fields are set in List Configuration.

7. As your staff creates more Lists on either the **My List** or **Public List** page, the page displays all Lists, a description of the list, the list Category, the list creator, the date the list was created, the date the list was most recently run, the number of records returned on the most recent run, the **Copy List** icon, the **Edit** icon and the **Delete** icon. Users with access to the **Public Lists** page, can view, edit or delete a List.



Merge Selected Records with Available Merge Documents

You can choose to merge selected records with any available document such as labels.

1. Click the **Select** box of the records to include in the merge. If the records you want to include are across multiple pages, change the page size. If you want to include all records across all pages, do not select any boxes.

2. Select a document from the **Available Merge Documents** drop-down.

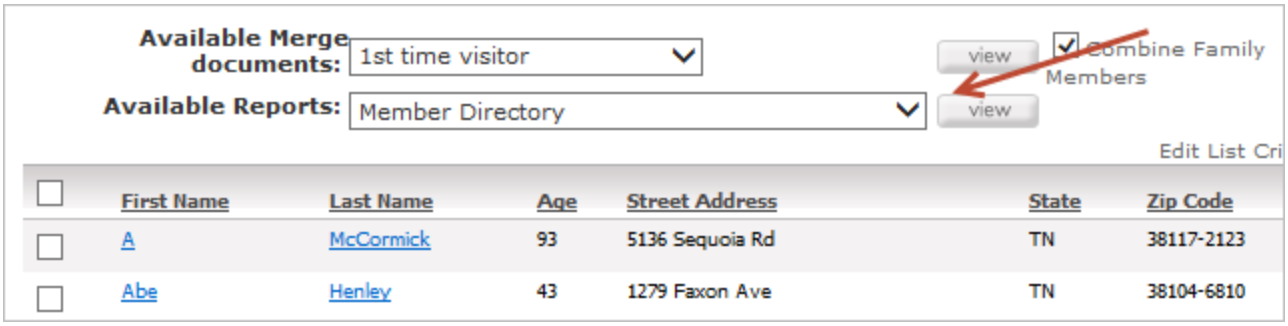
3. Click the box for **Combine Family Members**, if desired.

4. Click the **View** button.

5. Then click the **Open** or **Save** button for the final merge.

Steps to merge the results of a list with an available report

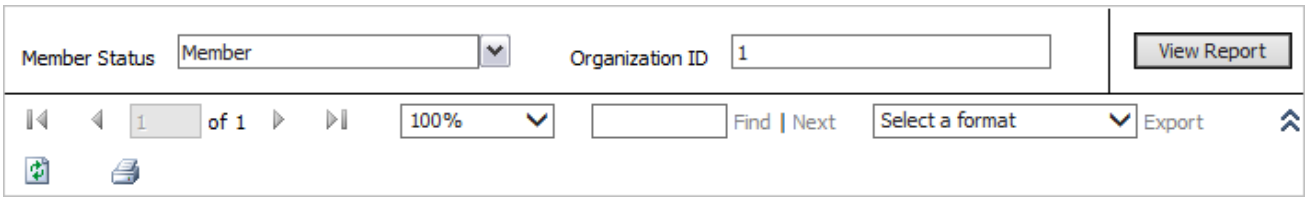
1. From the list results page, select the report.



2. Click the **View** button.

3. Select or enter report parameters.

4. Click the **View Report** button. For some reports, you need to export the report to view all results.



5. Select report output.

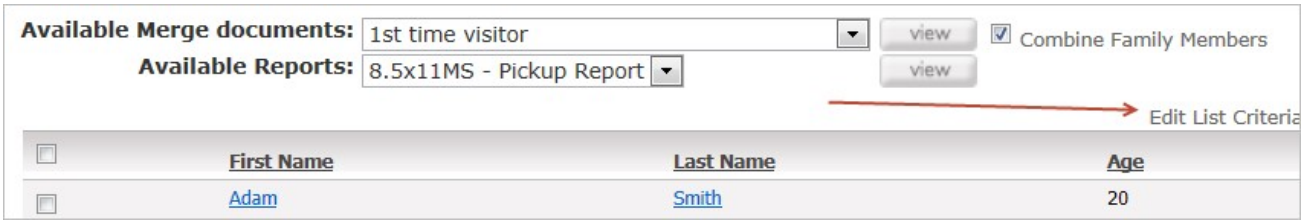
6. Click the ***Export*** link.

Edit a List

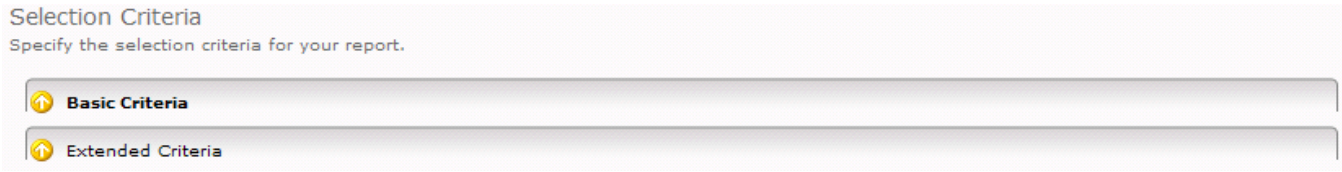
1. Click the **Edit** icon on the **My List** or **Public List** page, or the ***Edit List Criteria*** link on the **Report** page.

Editing a List

Report Page



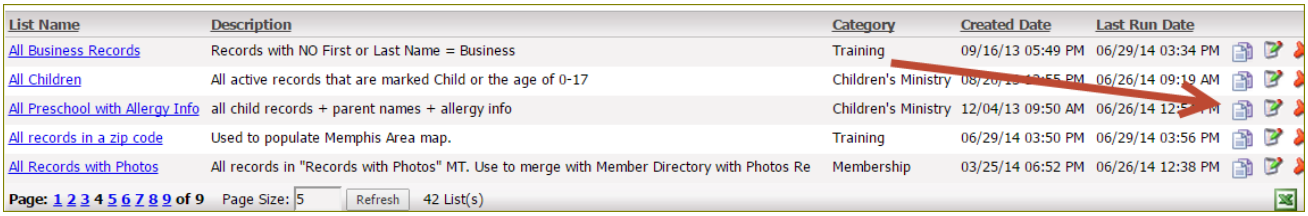
The **List Wizard** page displays and you can make the necessary criteria adjustments on every page. A bold criteria section indicates selected criteria.



Copy a List

You can copy a list on either the **My List** or **Public List** page. Once you copy the list, it displays on the page of which you copied the list. So, if your goal is to copy the list from the **My List** page and make the copied list available on the **Public List** page, use the below steps. You can also copy a Public List and 'move' the copied list to the **My List** page.

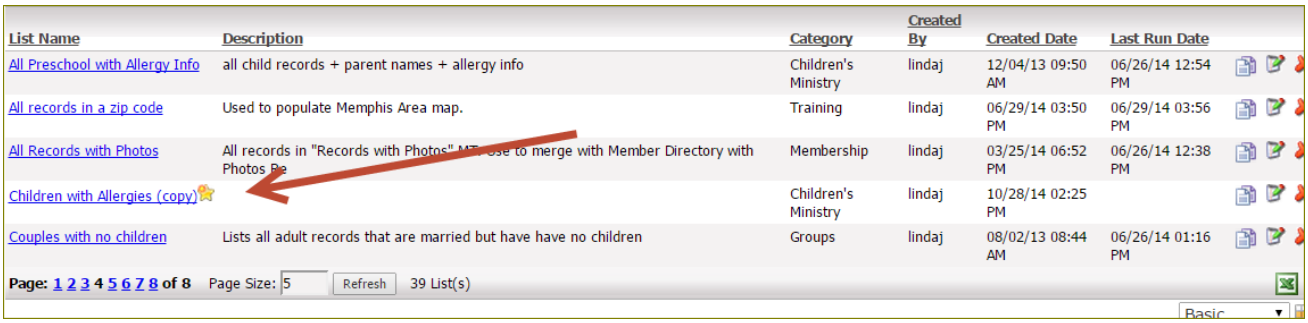
1. From the **Public List** or **My List** page, click the **Copy List** icon.



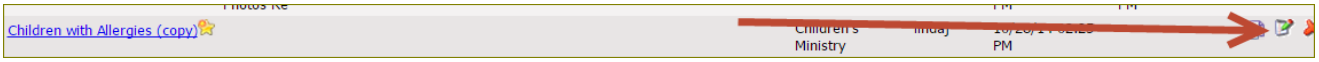
2. Rename the list in **Report Name**.

3. Enter **Report Notes**.

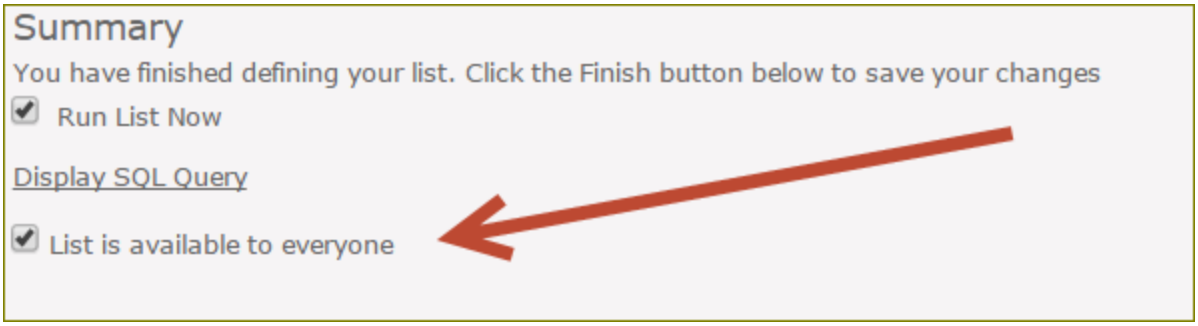
4. Click the **Copy** button. The **New Report** icon indicates the copied List.



5. Click the **Edit** icon to modify the copied report.



6. You can now click through all steps and make any desired changes including where to display the list. To make the list available on the My List of the current user logged in, remove the check for the List is available to everyone check box.



Membership FAQ's

How does Arena determine Head of Household (HOH)?

The head of house calculation picks the family members, sorts them by role (adult vs. child) and by gender (male before female), and then returns the first record that results. For example for a family with one-adult male and one-adult female and two child records, Arena assigns the adult male as the HOH. For a family with one adult (male or female), Arena assigns the adult as HOH. A single adult's record is always the HOH.

Does Arena record the information I edit?

Yes. Arena adds a note to the person's history when you edit personal information along with the date of the change and which user made the change.

History

View History

Person Updates — Display: 5

Email removed: adam.bryant@shelbyinc.com	6/13/2013 9:01 AM	Stewie Administrator
Email added: kennethalong@hotmail.com	6/13/2013 9:01 AM	Stewie Administrator
Pin Record Updated (Details unavailable due to security)	2/12/2013 5:20 PM	Stewie Administrator
SSN Record Updated (Details unavailable due to security)	2/12/2013 5:20 PM	Stewie Administrator
Pin Record Updated (Details unavailable due to security)	2/12/2013 5:20 PM	Stewie Administrator

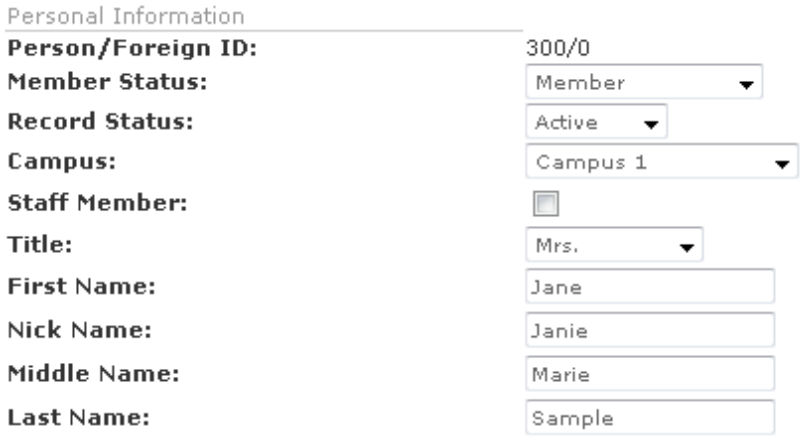
Person Attribute Updates — Display: 5

Currency Type Test changed from '999.0000' to '1000.00'	4/10/2013 4:19 PM	Stewie Administrator
Currency Type Test changed from '1000.0000' to '999.00'	2/26/2013 4:59 PM	Stewie Administrator
Currency Type Test changed from '-1' to '1000.00'	2/26/2013 4:57 PM	Stewie Administrator
Birth Certificate Updated	8/4/2011 2:44 PM	Stewie Administrator
Birth Certificate Updated	8/4/2011 2:38 PM	Stewie Administrator

How do I add a Nick Name?

Use **Quick Search** or **Advanced Search** to select and display the person's record.

1. Click the ***Edit*** link to the right side of Personal Information.
2. Enter the **Nick Name**.



3. Click the **Save** button.

How do I change Record or Member Status?

You can update the person's record status on the **Person Detail** page or on the **Edit Family Wizard** page.

Person Detail Page

1. On the **Person Detail** page, click the ***Edit*** link of the Personal Information section.

2. Change the **Record Status**.

3. Click the **Update** button. When changing a record status to inactive you also need to select a reason why. Changing the person's record status to inactive also changes their status in tags and groups.

4. The below message displays to confirm you want to change their record, tag and group status to inactive.

5. Click the **OK** button.

6. Click the **Save** button on the **Person Detail** page or the **Next** button on the Family Wizard. Arena displays a pop-up message to confirm this action.

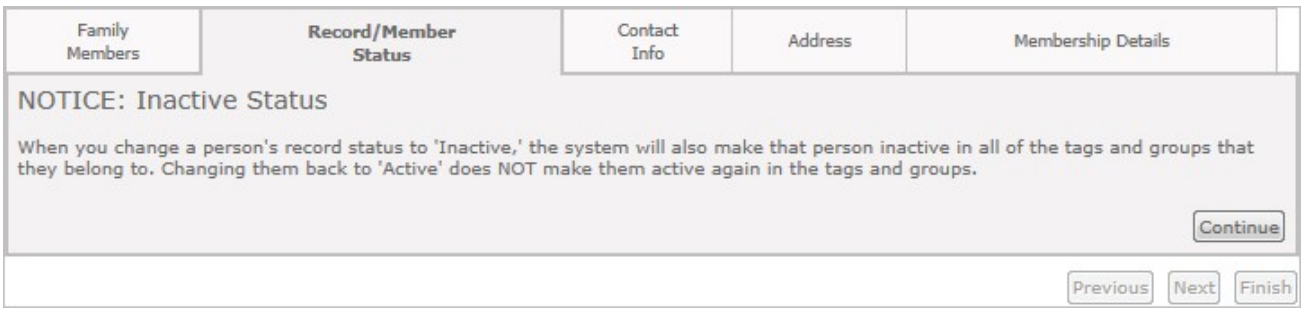
Edit Family Wizard

1. On the **Person Detail** page, click the ***Edit*** link on the family section.

2. Change record status. When changing a record status to inactive you also need to select a reason why. Changing the person's record status to inactive also changes their status in tags and groups.

3. Click the **Finish** button.

4. The below message displays to confirm you want to change the person's record, tag and group status to inactive.



5. Click the **Continue** button.

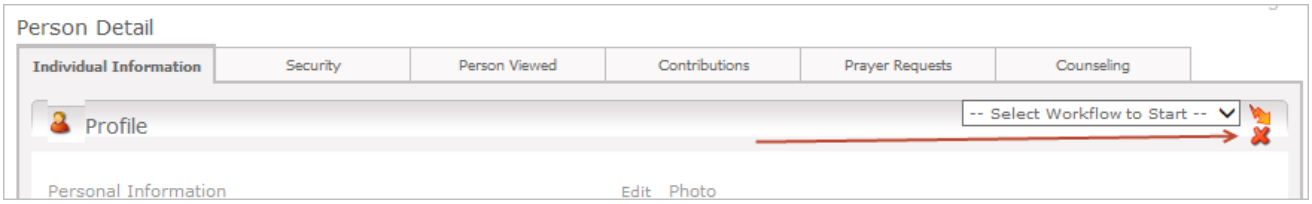
6. Click the **Finish** button.

How do I Delete a Record?

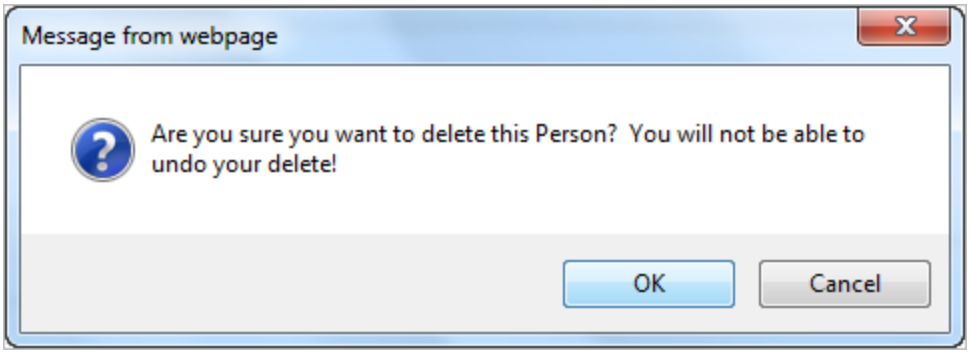
If you have permission to delete records, a **Delete** icon displays in the top right corner of the Person Detail. You can delete records where contributions do not exist. If contributions exist for this record, you can reassign the contributions on either the **Contribution List** page or the **Contributions** tab of the person's record. By deleting the record, the record is removed from all Groups and Tags to which they are associated. (If you have several records to delete you could merge all records into one and then delete that record.)

1. Search for the record to delete.

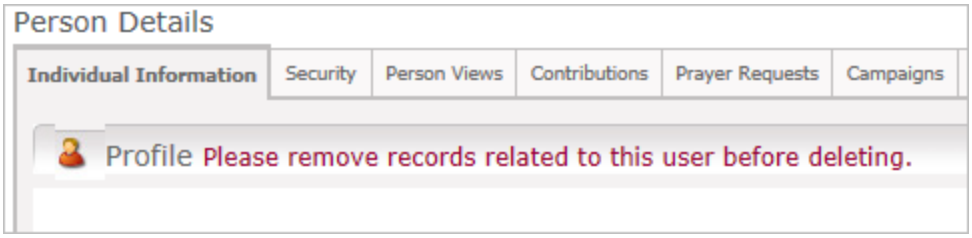
2. Click the **Delete** icon in the top right corner.



3. Click the **OK** button on the message pop-up to confirm deleting the record.



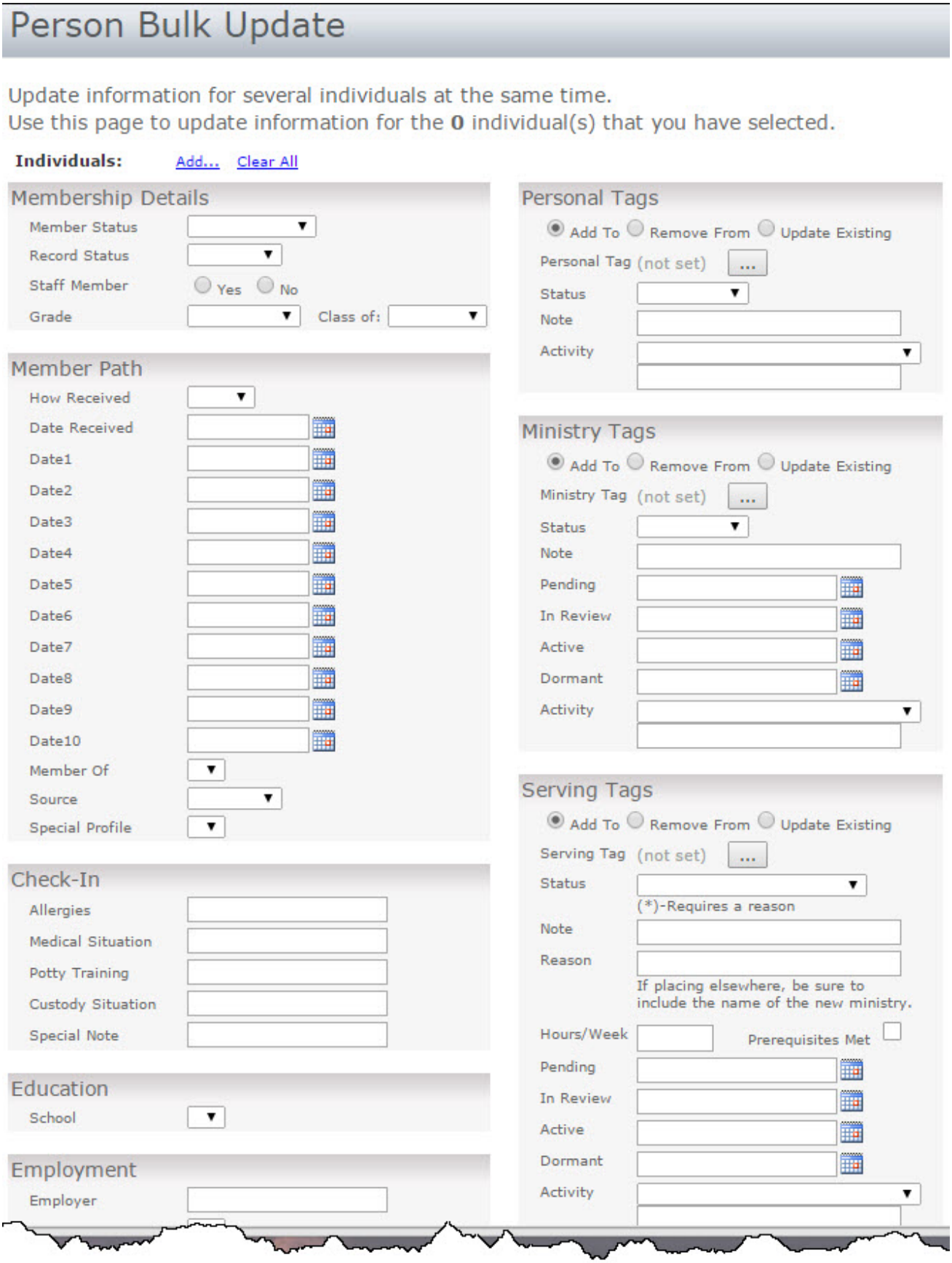
4. If "Please remove records related to this user before deleting" message displays, this typically indicates the record has contributions. You need to reassign or delete contributions before deleting any record.



How do I Update Several Persons using Bulk Update?

The bulk update feature adds, removes or updates existing information for multiple records. Options may vary by organization. If no campaigns exist, the campaigns section does not display on this page.

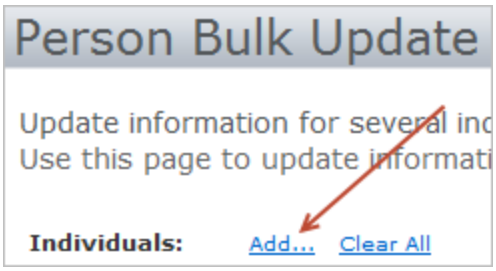
Set the Secure Fields module setting on the Bulk Update module to “True” in order for Arena to honor security for all associated fields on the **Person Bulk Update** page.



Bulk Update Existing Records

1. From the **Membership** menu, click the **Person Bulk Update** option.

2. Click the ***Add*** link to search and select existing records you want to update. The records display in order of person id.



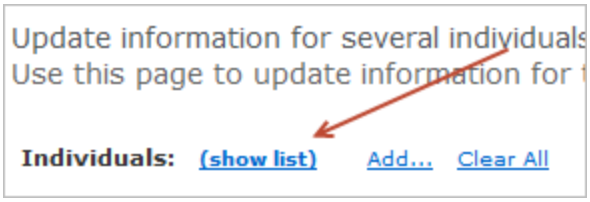
3. Make desired changes. If no campaigns exist, the campaigns section does not display on this page.

4. Click the **Update** button at the bottom of the page.

5. You can optionally update from a List, Group or Tag.

6. From the **List Results**, **Group** or **Tag** page, click the **Bulk Update** icon. From the list, group or tag, you can select specific records from the list, group or tag page or select none. If you select no specific records, Arena includes all records from the list, group or tag.

7. Click ***Show list*** link to view all selected records.



8. From this view, you can remove or add records prior to proceeding with the update.

9. Click the **Delete** icon to remove a record from the update.

10. Click the ***Add*** link to add an existing record to the update.

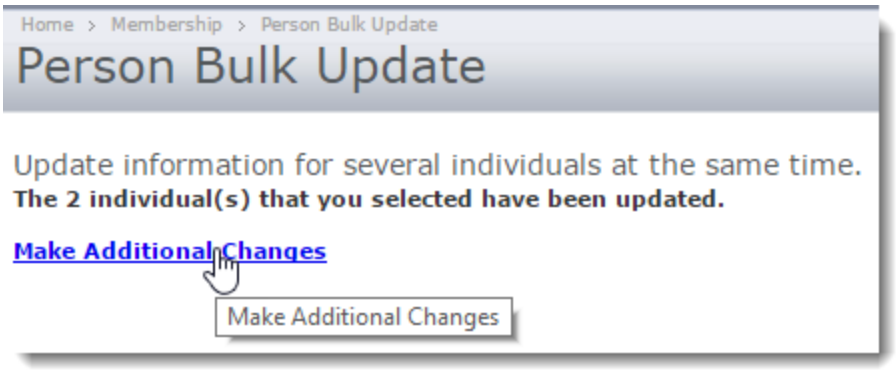
11. Click the ***Clear All*** link to remove all records.

12. Make desired changes. You can select to add, remove or update records for a tag or group. If

no campaigns exist, the campaigns section does not display on this page.

13. Click the **Update** button at the bottom of the page.

14. After the records are updated, there is a ***Make Additional Changes*** link in case you want to make some more changes with the current selection. (If you do not want to make any more changes with the current selection, simply navigate to another page. This is an optional step.)



How do I Merge Members?

The **Merge Members** page is where you can merge two or more records into one new merged record. Arena's merge wizard displays every field that contains different values. If a field has only one value across all records, Arena still displays the field. You can select which value to keep with the merged record. Security permissions can be set so that certain users with view permission of the Merge module can start the merge process and other staff with view and edit permission can receive an email to complete the merge process.

Merge Members Customization Options

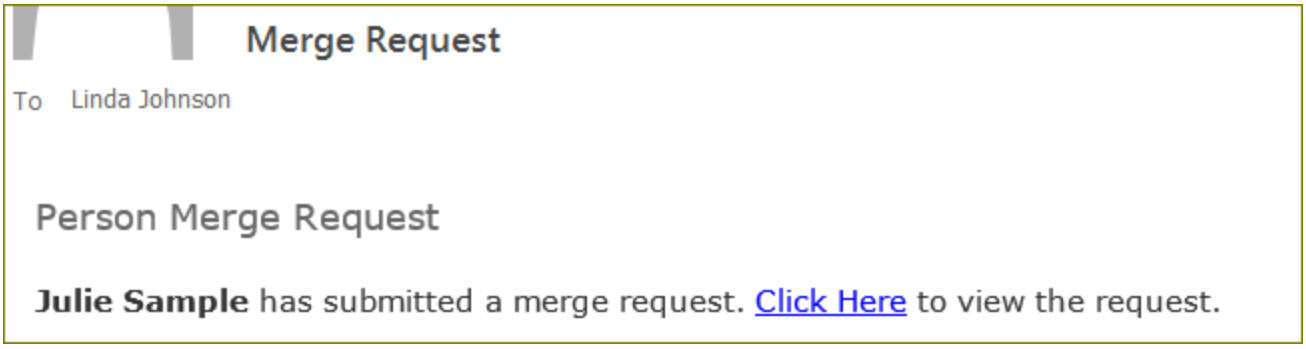
- Customize the Delete Merge organization setting. Set to "True" to delete duplicate records, once merged.
- Consider implementing the option to enable general users to 'request' records to be merged but other users to complete the merge.

Use the below steps to implement this option:

- Add the email address of the person to notify of merge requests to the **Merge Request**

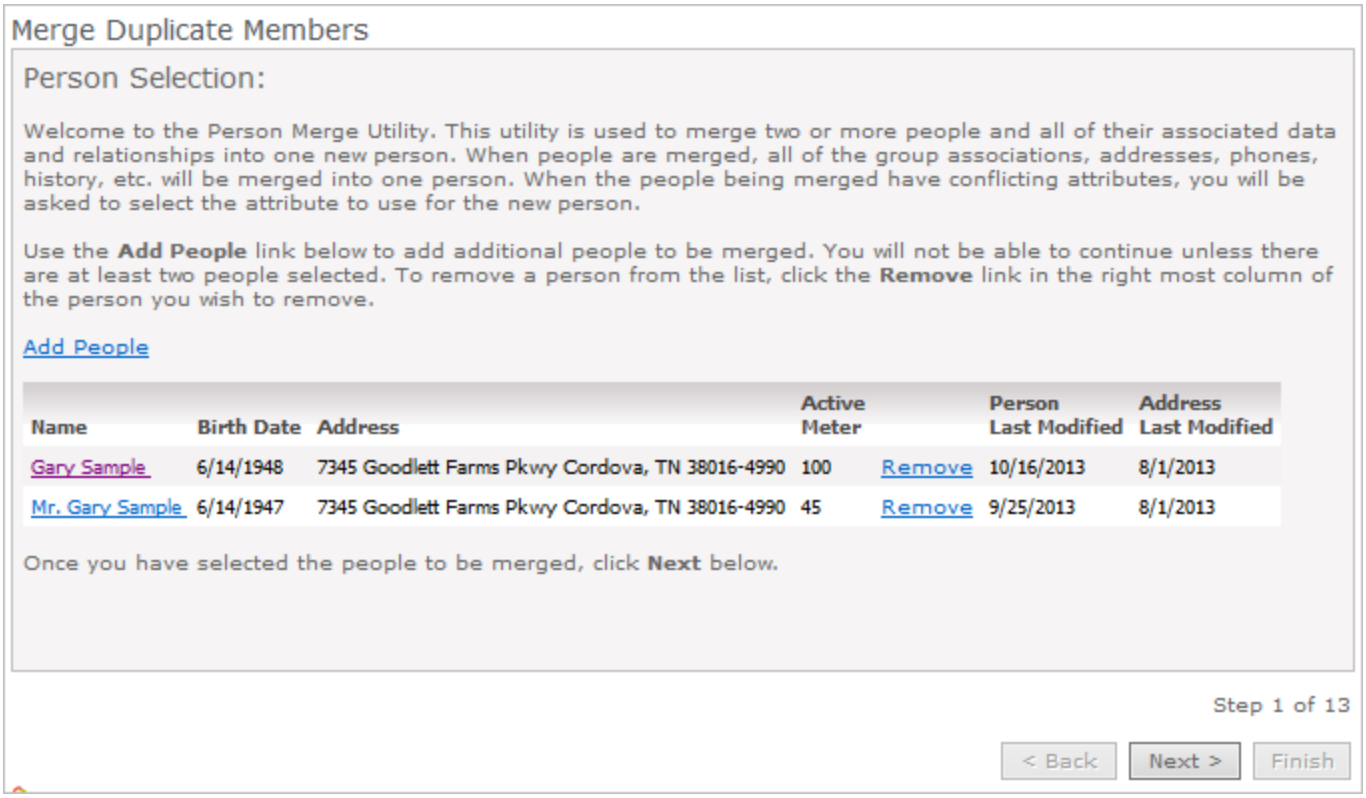
Recipient Organization Setting.

- Customize security roles for the users who can request the merge and users who can complete the merge. For the security role of users who can select (request) records to merge, set permission to view the **Merge Members** page and Member Merge module. For the security role of users who can complete (approve) the merge process, set permission to view for the **Merge Members** page; view, edit and approve the Member Merge module.
- Customize the **Merge Person Request System Email**. Recipients receive an email such as the one below. Users with permission can select the ***Click Here*** link to complete the merge.



Steps to Merge Members

1. From the **Membership** menu, click the **Merge Members** option. You can optionally click the **Merge Member** icon from the search results page.
2. Click the ***Add People*** link to display the Person Search pop-up to search and select the records to merge.



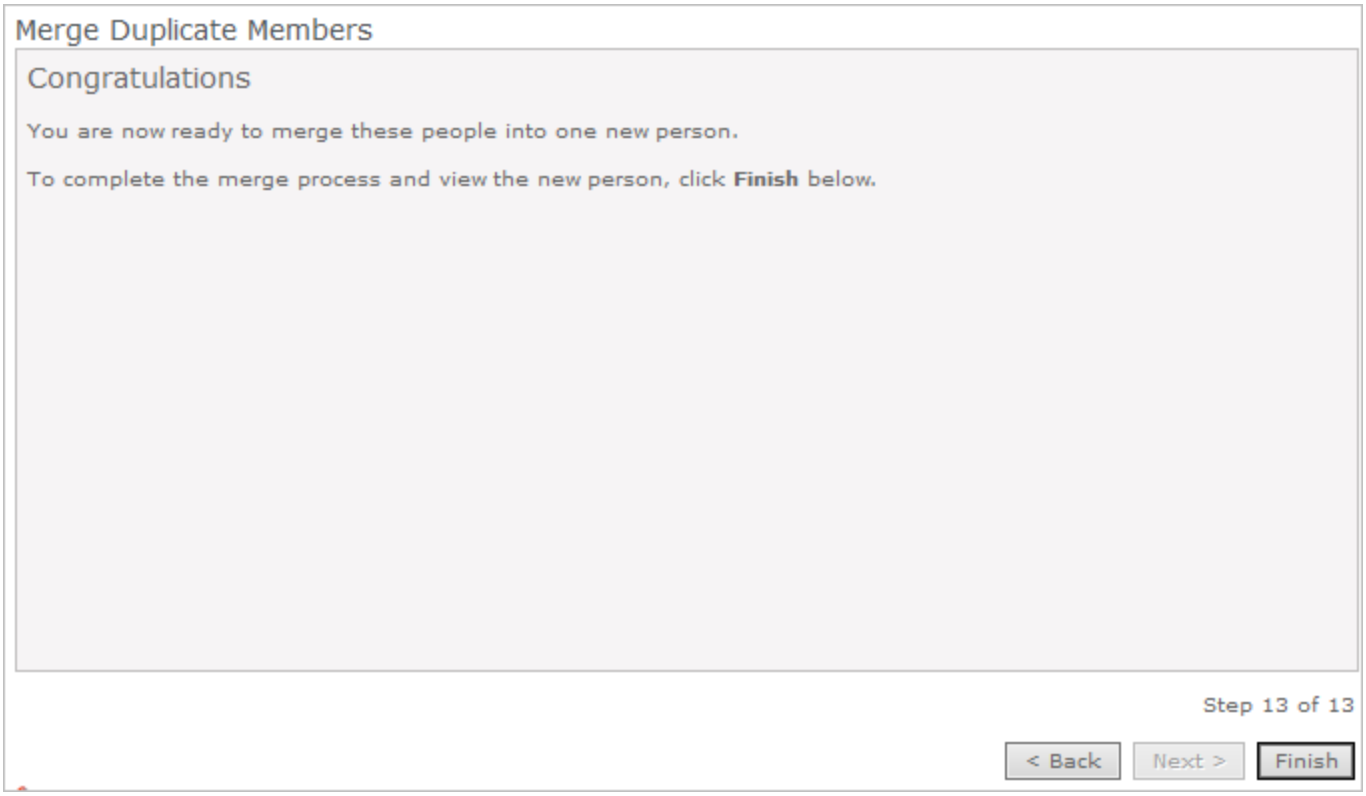
3. Click the ***Add People*** link to add more records to this merging instance.

4. If you incorrectly added a record, click the ***Remove*** link. This removes the record from the merge process. You cannot delete records from this page.

5. The Merge Wizard also displays the number of fields that contain a differing value.

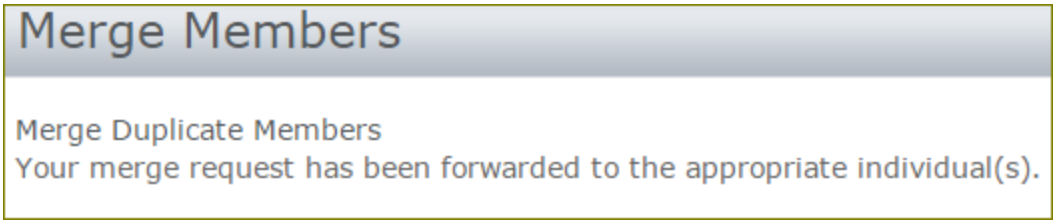
6. Click the **Next** button. Arena displays a page for every field where the values differ. After selecting the value to keep for each field, click the **Next** button until you review and select all fields.

7. On the last page of the wizard, click the **Finish** button to complete the merge. The merge completes when you click Finish. Arena removes the duplicate records and the new record displays with a new Person ID number that may affect Security, e-Newsletters, Check-In, etc. You cannot reverse this process.

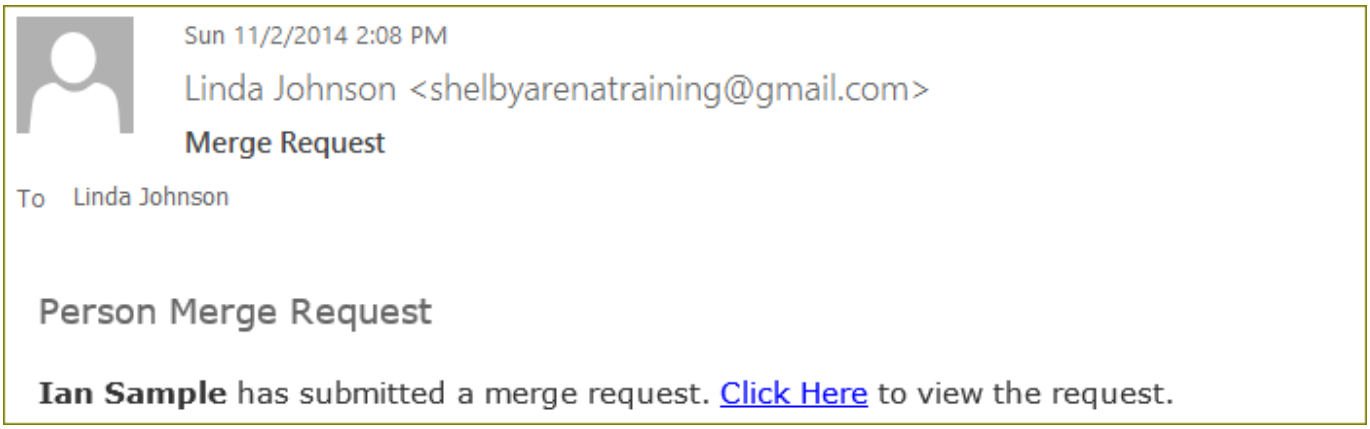


8. When merging a record that is part of a family, verify the address for all members. The address you select during the merge process only applies to the merged record.

9. If you do not have permission to merge the records, the message below displays.



10. Arena sends an email to the designated user, as shown below. The user with merge permission can select the ***Click Here*** link to continue with the merge for the selected records.



What is the Me page?

The **Me** page displays the Person Detail page of the current user.

Groups and Tags Overview

As your organization implements Groups and Tags, you may be wondering when to use a Group or a Tag. To help you with this evaluation, below are some considerations to assist you in making the determination that is best suited for the need.

Groups	Prospective Group members can register for a Group via the Group Locater. Group Leaders can access the groups to which they are a leader of via the Group Leader Toolbox where they can manage group members, communicate with group members, take attendance, view and print group rosters. Use Group Area maps to reflect members and groups on an area map.
Event Tags	Designed to use for events with beginning and end dates. Has an option for online registration. Integrated payment gateway required.
Serving Tags	Prospective volunteers can register on the Arena-managed portal where Arena can email the Tag Owner of the prospective volunteer. Use enhanced Tag Status to manage volunteer processing, including email notification of critical prospects. Use the reminder notification option to remind volunteers of the next time they are schedule to serve.
Ministry Tags	Use to manage other collections of records that are not a group, event or serving tag but should be available to more than one staff member.
Personal Tags	Use to manage collections of records that are specific to the current user.

Below are the tools available for both Groups and Tags:

- Ability to organize so you can have as many levels as needed per Group or Tag.
- You can set view and edit security for each tree structure and level.
- Individual records can be in more than one Group and/or Tag. For Groups, records are added at the lowest level of the Cluster Type.
- Attendance Types can be attached to a specific Group or Tag for the purpose of using

Check-In, printing rosters and taking manual attendance.

- Users can send emails or Text Message (SMS) communications from a Group or Tag.
- Users can use the Person Bulk Update from a specific Group or Tag.
- Users can Word Merge (such as labels) all or selected records from a Group/Tag.
- Users can export all or specific records in a Group or Tag to Excel.
- Users can make individual Groups or Tags inactive for archiving purposes.
- Users can make individuals active/inactive in Groups and Tags.
- Users can upload documents to a specific Group or Tag.

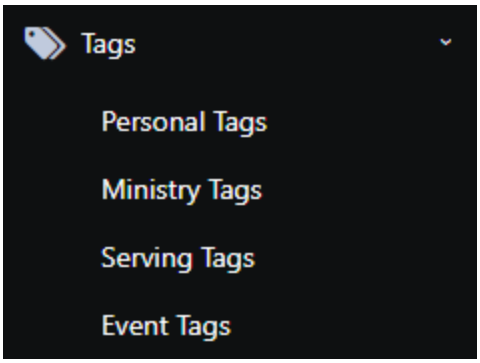
Key Characteristics of Groups and Tags

Feature	Groups	Personal Tags	Ministry Tags	Serving Tags	Event Tags
Active and dormant dates			X	X	
Active and inactive option	X	X	X	X	X
Area Maps	X				
Automated e-mails to leader	X			X	
Can assign Security Roles	X		X	X	X
E-mail communication	X	X	X	X	X
Group Leader Toolbox	X				
Group Locator	X				
Leadership roles	X				
Multiple layers of structure	X	X	X	X	X
On-Line registration and payments					X
Only seen by the creator of the item		X			
Requires same number of levels with tree structure	X				
Subscribed function	X	X	X	X	
Track attendance	X	X	X	X	X
Volunteer tracking tools				X	

Tags

Tags are another way to identify how people connect to your organization. Arena offers four distinct tag types and each type is designed for specific functionality.

- Personal Tags are only accessible to the current user and allow each user to track people such as lunch contacts, personal accountability partners, and relationships specific to you.
- Ministry Tags allow you to track people and their relationship to your organization's ministries, such as, Bible study participants, organization committees, and other ministry-specific groups.
- Serving Tags allow you to track volunteers and prospective volunteers for your organization's ministries. You can also track volunteer qualifications and/or training.
- Event Tags allow you to track organization-wide and ministry-specific events and classes, where online registration is available.



Regardless of tag type, each tag type has the same elements:

- You can create and organize tags in a **hierarchy** for logical groupings.
- Every level in the tag hierarchy can have **individuals** connected if desired.
- You can easily **move** tags from one level to another or from one type to another, with the exception of moving Personal, Serving or Ministry Tags to Event Tags.
- **Add** Tags to individual records or add records to Tags.
- Each record in the tag has a tag **status**. Default options are: "In Process", "Connected", and "Inactive". (Serving Tags have additional options for the purposes of managing the volunteer process.)
- Each record in the tag has **Date** fields to track dates such as date the record was added to the tag and the date the record was dormant.
- You can add Tag Activity **Notes** for each record in the tag.
- Add a record to a specific tag **one** time.

- Each tag can be **secured**.
- Users can select or omit the tag in Arena **Lists**.

What can I do with a Tag

- Take attendance.
- Send email or Text Message (SMS) communication.
- View and print a Roster.
- Upload documents.
- Identify the person's status - Connected, Inactive, Pending. Serving Tags have other default statuses and provide the opportunity to customize to fit your organization.

Customization Options

Each tag four levels of security permissions.

- **View** gives users permission to view the specified tag(s).
- **Edit** gives users permission to edit the specified tag details.
- **Edit Security** gives users permission to edit security for the specific tag(s) and cascade permissions to child tags.
- **Edit People** gives users permission to edit people in the specified tag(s).

Event Tags have two additional permissions to "edit registrations" and "allow refunds".

After you have determined how you want to use Tags, it is important to understand **Tag Security**. Ministry, Serving, and Event tags are commonly organized so that security is set on a Parent tag (one for each department) and then each child tag inherits the security from the Parent tag. Or, security can be setup individually on each tag.

Evaluate Profile Details and Profile Tab Control modules on the **Profile Member Details** page, and the Profile Activity and Tag Member Activity modules on the **Tag Member** page. Customize as needed.

Personal and Ministry Tags

Although Ministry tags and Personal tags have different security settings, the overall setup of both is the same.

This Help page contains the following sections:

Treeview

Create a Ministry Tag

Subscribe to a Tag

Change the Parent Tag

Members tab

Security tab

Occurrences tab

Attendance Summary tab

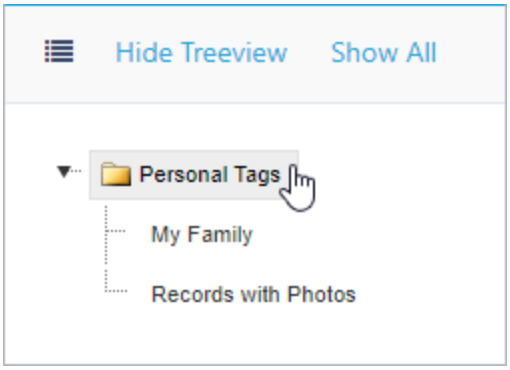
Roster tab

Documents tab

Module Settings

Personal Tags

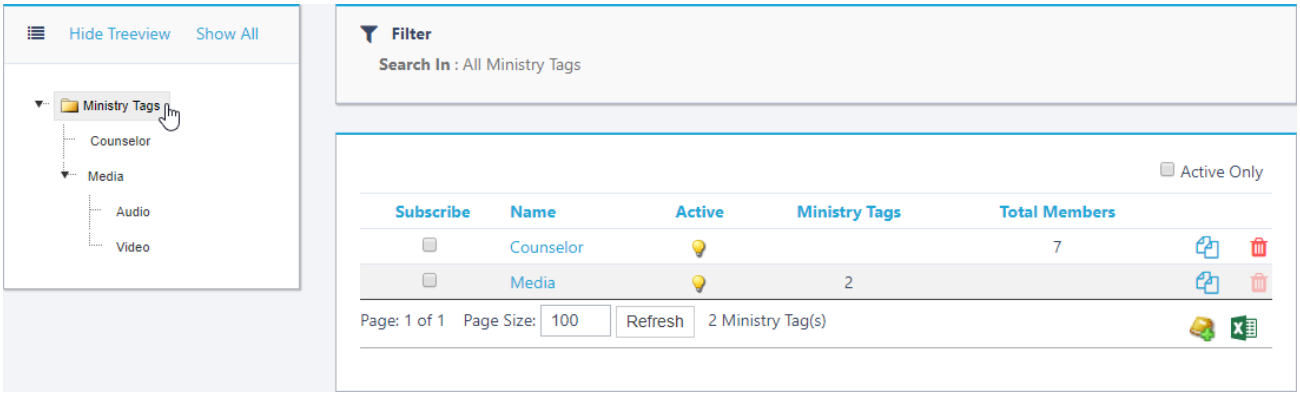
Personal Tags are specific to the user logged in. Only the user that created the tag can view and edit the tag and therefore Personal Tags do not have security settings.



Ministry Tags

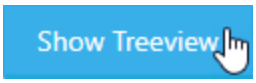
Ministry Tags are used to track individuals as they relate to your organization's ministries. Security

rights for a Ministry Tag can be assigned to any security role or individual.

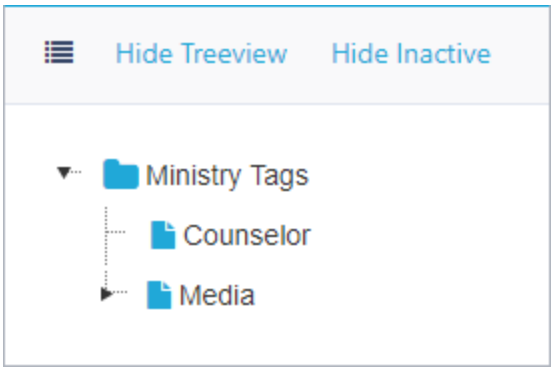


Treeview

The Treeview shows a visual representation of how the tags relate to each other. It can be viewed by clicking the **Show Treeview** button.

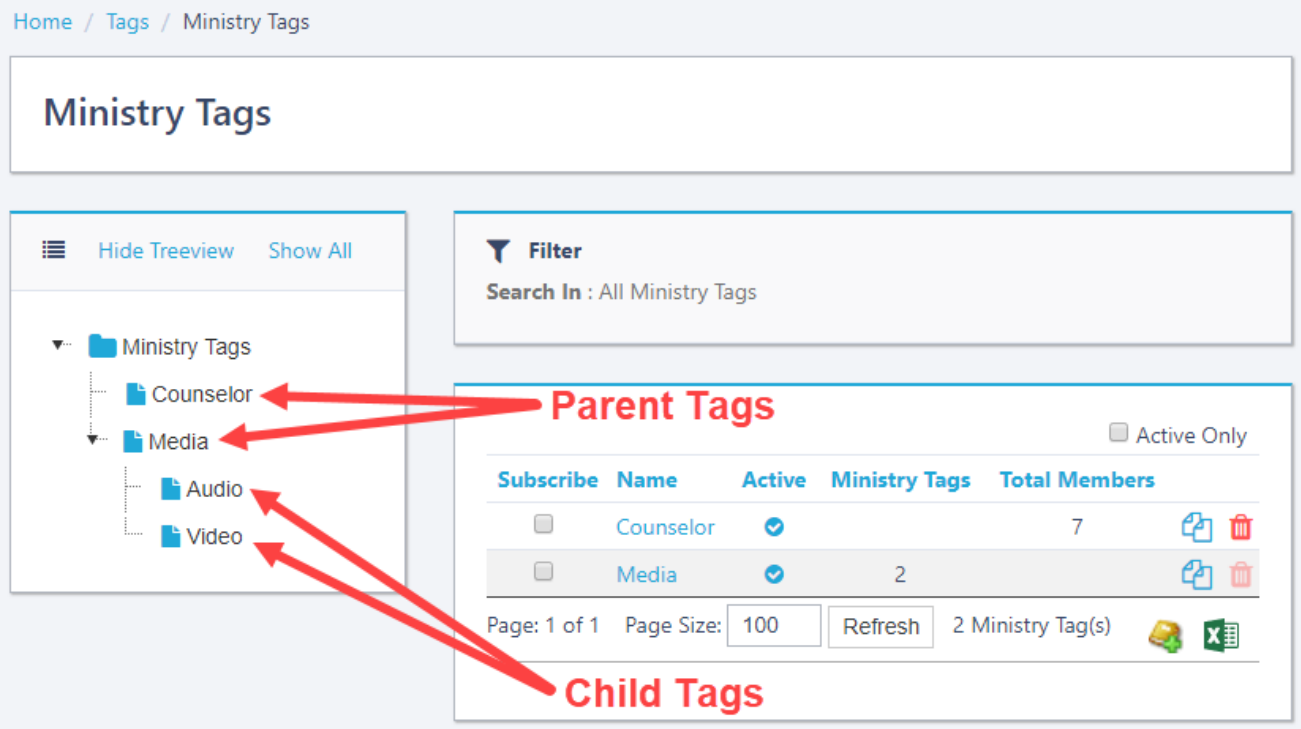


The Treeview contains a toggle that switches between showing inactive tags (***Show All*** link) and hiding the inactive tags (***Hide Inactive*** link). Click the Hide Treeview link if you would like hide the Treeview and have more space on your screen to view the various tabs.



All tags that relate directly to the **Ministry Tags** folder are referred to as **Parent** tags. Any tag that is under a Parent tag is referred to as a **Child** tag. You can add unlimited number of child tag levels under a Parent tag.

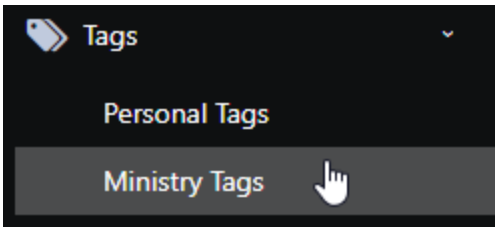
NOTE: Members can be added to both Parent or Child tags.



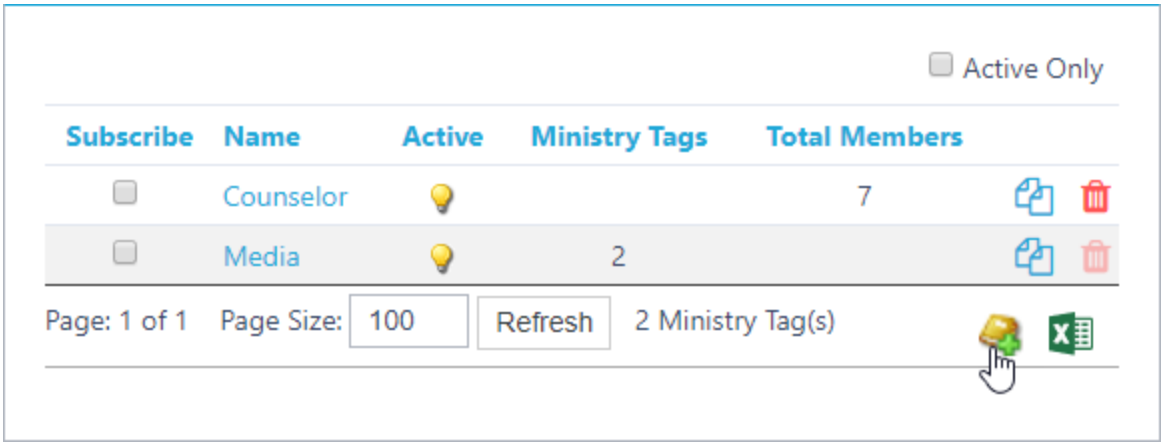
Create a Ministry Tag

NOTE: Before creating Ministry Tags, consider how the tags are going to be organized in the tree structure and how security should be assigned for staff to access each tag appropriately. The following steps walk you through the process of creating a Ministry tag.

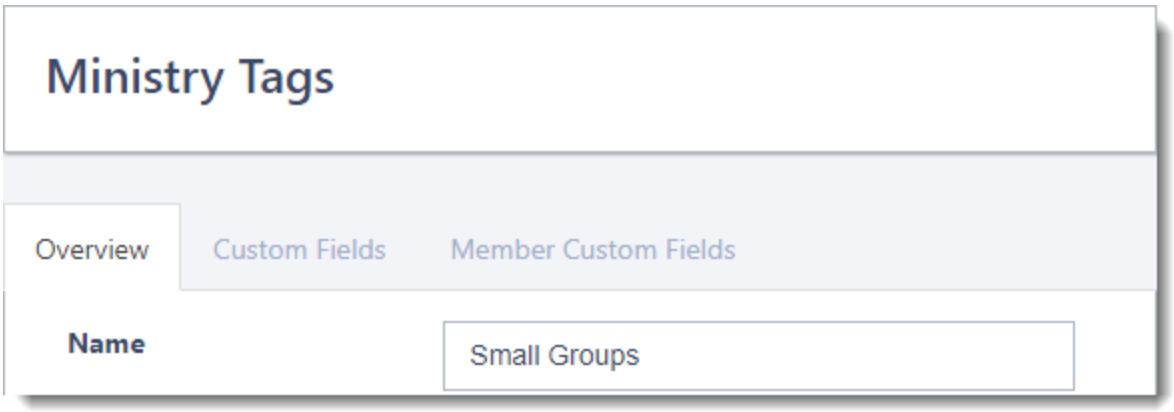
1. From the **Tags** menu, click the **Ministry Tags** option.



2. Click the **Add New Tag** icon in the lower right-hand corner.



3. In the **Overview** box, enter a **Name** for this tag.

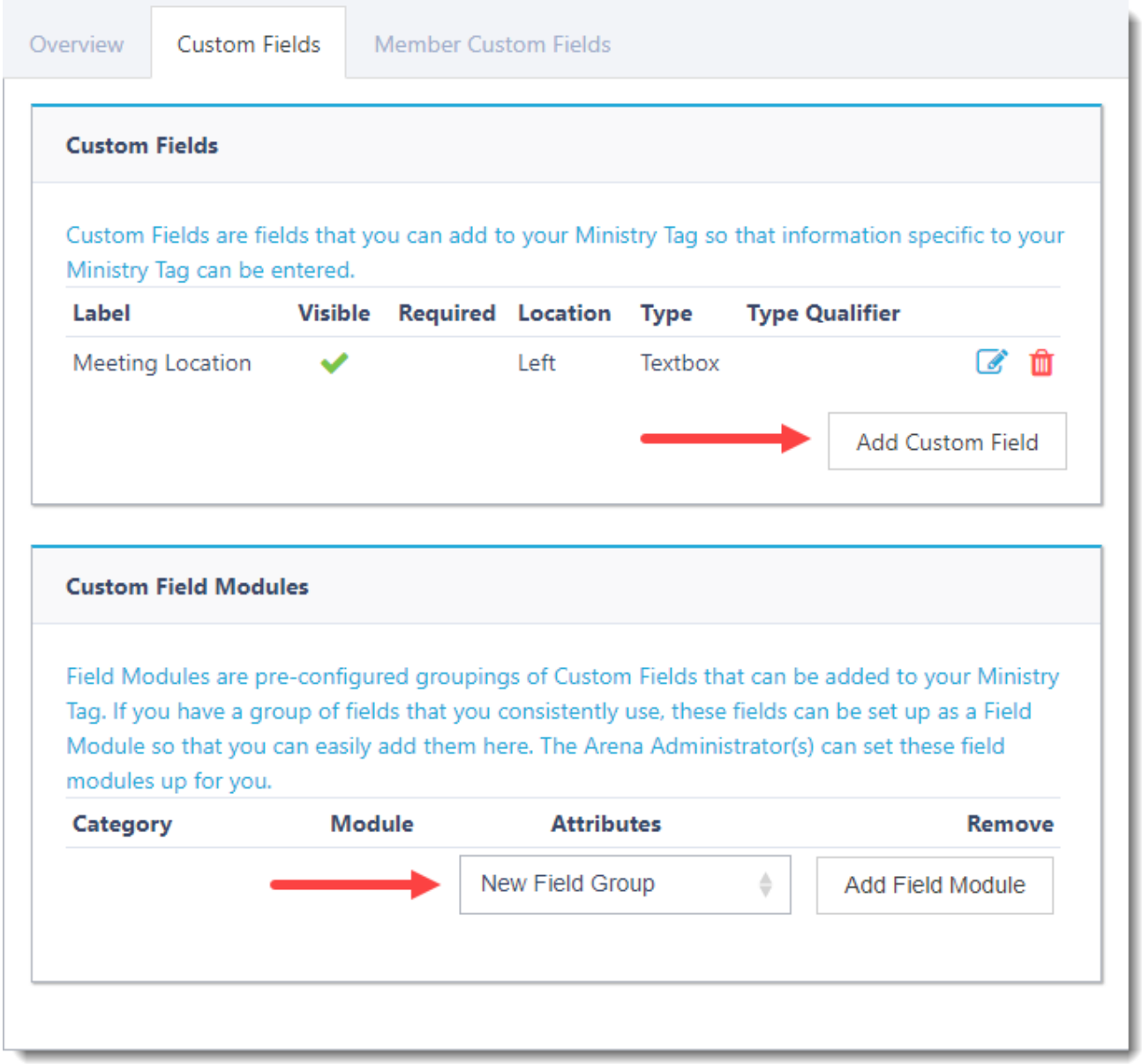


4. Enter any other fields, as appropriate.
   - **Name**: Enter a name for the tag (e.g. Media – parent tag; Audio, Video – child tags)
   - **Active**: By default, new tags are marked as "Active". If you are no longer using a tag but want to retain the history, you can uncheck the Active check box to make the tag inactive. Inactive tags can be excluded from reports and from the Tag Treeview while maintaining the history information for the tag.
   - **Parent**: Specify the parent for this tag. (Specify "Ministry Tags" if this tag does not have a parent tag.)
   - **Campus**: Use this option to specify a specific campus if you have multiple campuses and want this tag to be specific to one of those campuses.
   - **Default Start Time**: This is the default start time that is used when adding a new occurrence.
   - **Default End Time**: This is the default end time that is used when adding a new occurrence.
   - **Owner**: Defaults to the logged in user but can be changed. This field indicates who is the responsible contact person for this tag. (This is comparable to the "group leader" in Groups.)

- **Relationships**: These bars indicate the strength of the relationship between this tag and the owner, and between this tag and the members. The relationship strength can be set from 0 (Weak) to 4 (Strong). Once you move a relationship scale from the weak position, Arena calculates a numerical value that represents the strength of the relationship. The scores show in the Peer Network section on the Person Detail page.
- **Internal Notes**: This is an optional field but can be used to indicate anything specific about this tag. For example, if this is a tag to track Deacons who where just added, you may indicate the nomination and elections dates or other information. (These internal notes can be setup to appear on a report.)

Custom Fields tab

1. Click the **Custom Fields** tab. You can add custom fields by clicking the **Add Custom Field** button or select a pre-built Custom Field Module from the **New Field Group** drop-down. Use these options to record tag specific information such as meeting location for internal use. (See your Arena Administrator regarding Custom Field Modules.)



The following field types are available when adding a custom field:

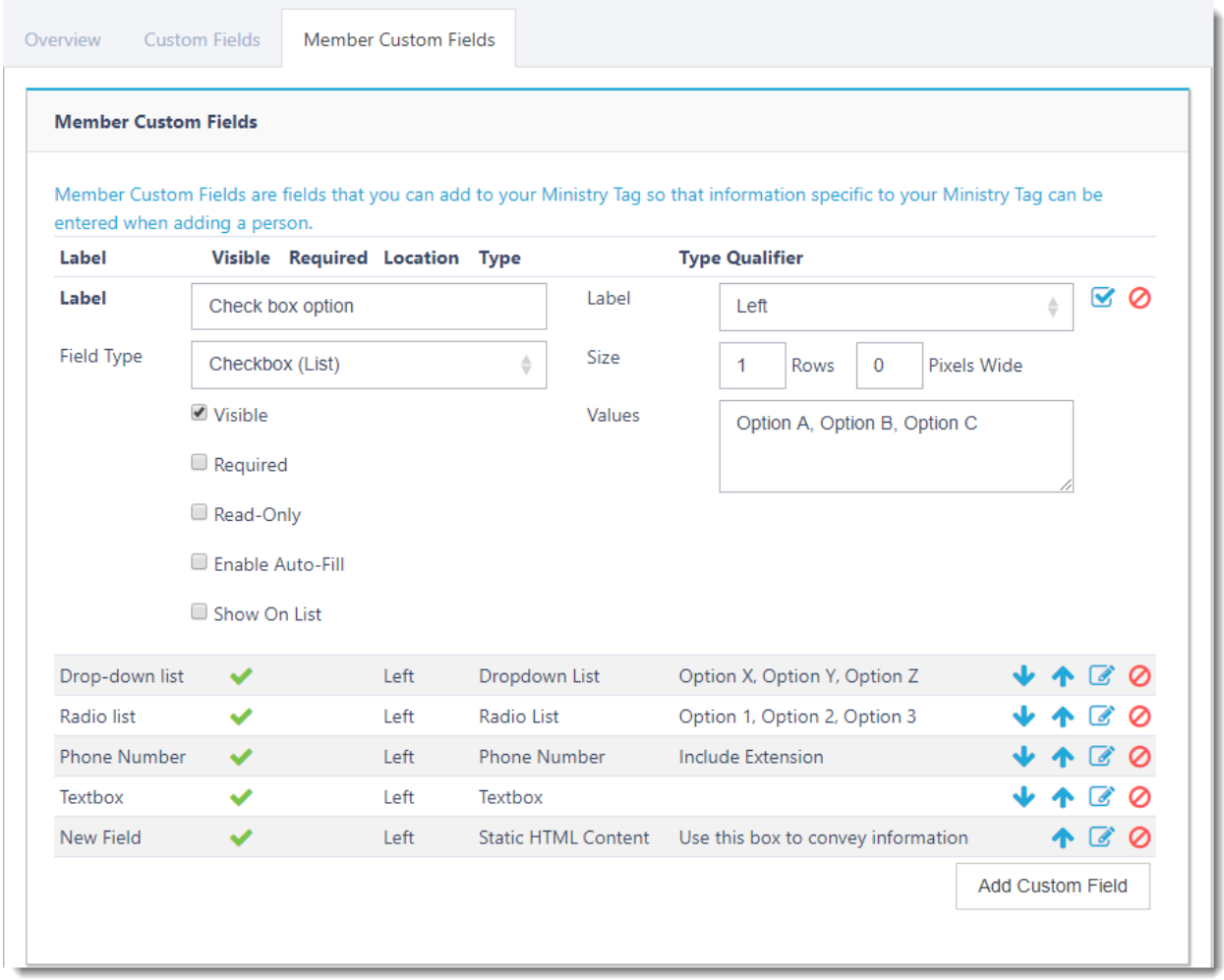
- **Address**: Places Street, City, State, and Zip fields on the form.
- **Area**: Places a list of existing areas on the form in a drop down list format.
- **Check Box**: Places a check box for each value added in the Value field. Enter the values separated by commas. You can select any or all of the available options.
- **Custom Query**: Allows a custom query.
- **Date**: Places a date field with a **Calendar** icon.
- **Document**: Allows a user to upload a document.
- **Drop-down List**: Places a drop-down list populated with each value added in the Value field.
- **Image**: This allows users to upload an image.

- **Lookup Type**: Allow you to select from a list of Lookup fields.
- **Person**: Allows you to select an existing record.
- **Phone Number**: Allows you to enter a telephone number.
- **Radio List**: Places a radio button for each value added in the Value field. Users can select only one option.
- **Rich Text Field**: Allows users to enter rich text.
- **Static HTML Content**: Allows user to enter HTML content.
- **Static HTML Content**: Any text placed in the Value field is included as static text.
- **Text box**: Places a text box on the form. The text box allows 255 characters.

Member Custom Fields tab

1. Click the **Add Custom Field** button to add custom fields to the tag or select a pre-built Custom Field Module from the **New Field Group** drop-down. (When using custom fields with Event Tags, the fields cannot be edited once the event tag has registrants.)

- **Label**: This is the name for the field.
- **Visible**: Check this option to display the field on the **Volunteer Opportunities** page on your Arena- managed website.
- **Required**: Check this option to make the field required.
- **Type**: This option is where you can select the type of Custom Field. Options are the same as Tag Custom Fields.

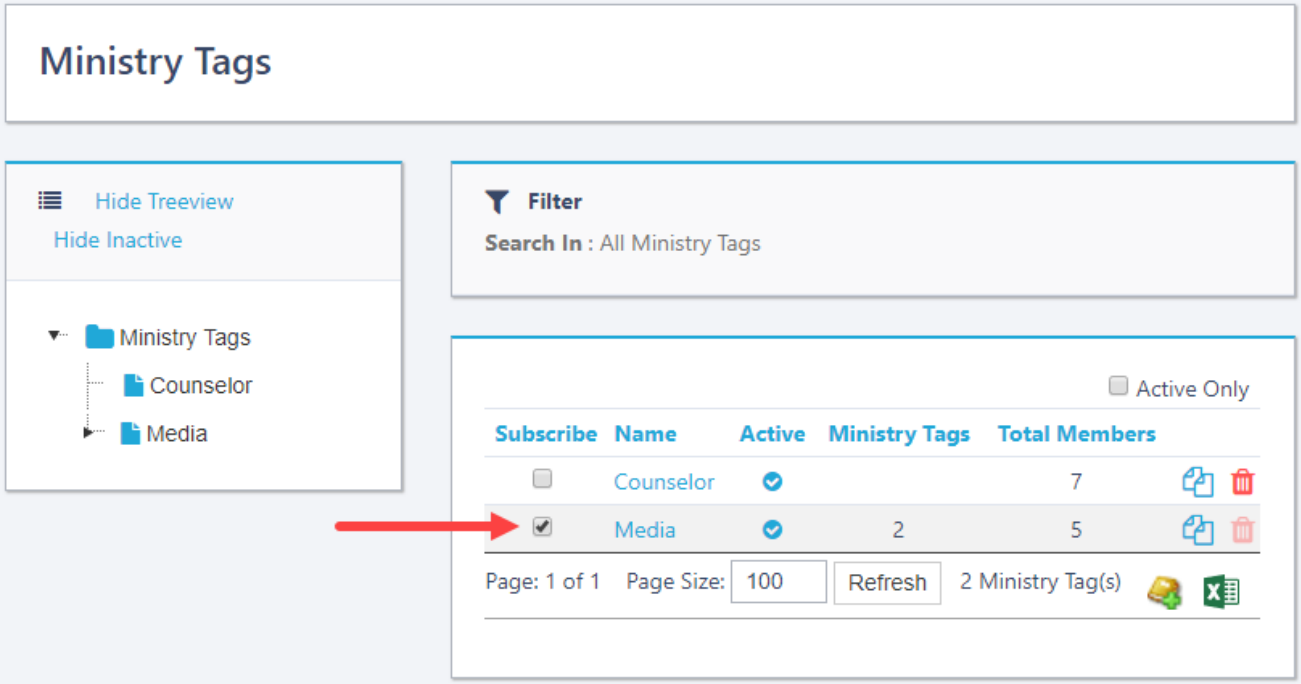


2. When you have finished entering all appropriate information into the Overview, Custom Fields, and Member Custom Fields tabs, then click the **Update** button at the bottom of the page to save your changes.

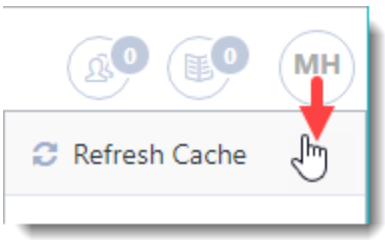
Subscribe to a Tag

Subscriptions are user specific links you can add to Arena's home page.

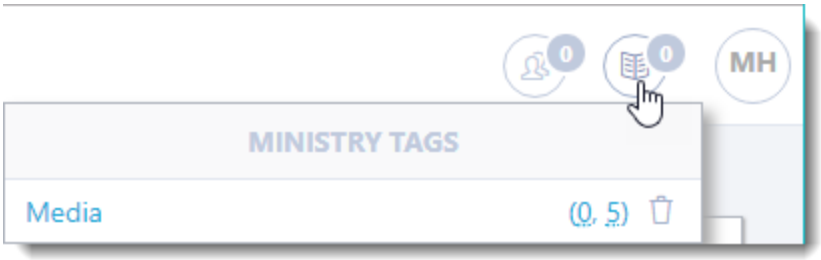
1. You can subscribe to a Tag by checking the **Subscribe** check box next to any Tag.



2. After subscribing to a tag, select the **Refresh Cache** option from the **Login menu** icon in the upper right-hand corner.



3. Hover over the **Subscribed Tags** icon in the upper right-hand corner to view the corresponding tag subscriptions. There is an **Unsubscribe** icon to the right which allows you to remove this tag from the Subscribed Tags listing.



Subscription Tab numbers

When viewing Tags from the Subscribed Tags icon, the numbers in parenthesis represent different values depending on the type of tag you are viewing:

For **Ministry Tags**, the numbers represent (Pending Members, Active Members).

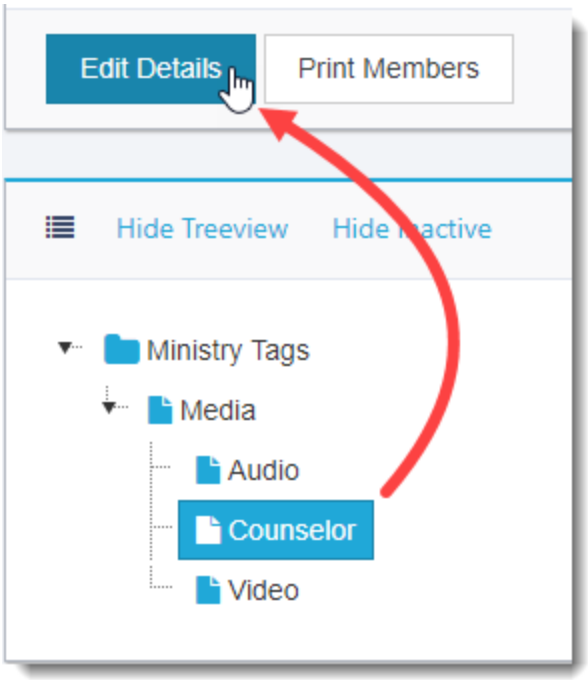
For **Event Tags**, the numbers represent (Non-connected registrants, Event Tag Registrants).

For **Serving Tags**, the numbers represent (Prospective Volunteers with a specific tag status, Critical Prospective Volunteers, People with the status of "connected" in the tag).

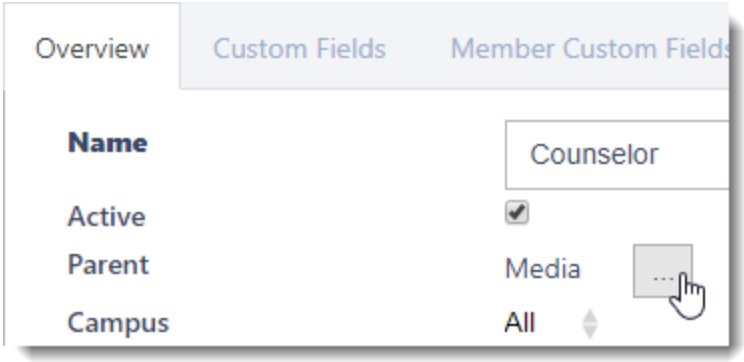
Change the Parent Tag

The following steps walk you through changing the Parent Tag from the "Media" tag to the "Ministry Tags" folder.

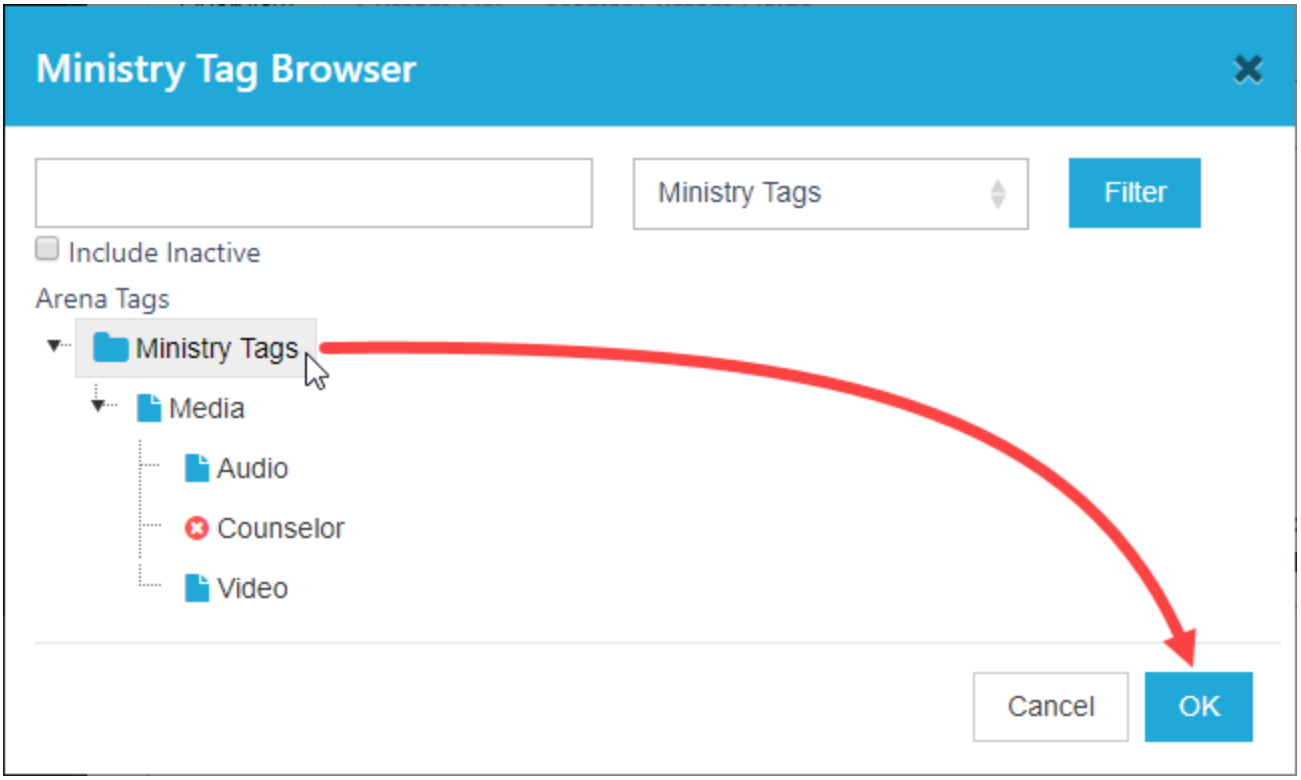
1. Select the **tag** on the Treeview and then click the **Edit Details** button.



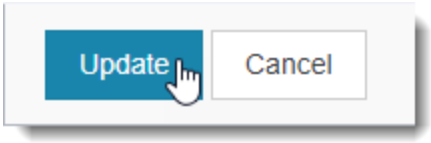
2. Click the **Search** icon for the Parent field.



3. Assign the tag to the correct parent (e.g. Ministry Tags) under the **Arena Tags** heading and then click the **OK** button.



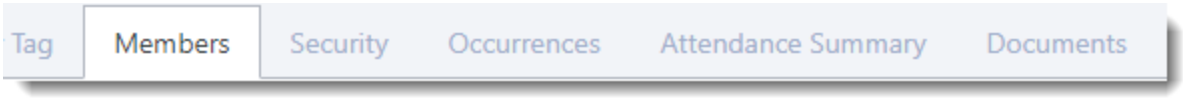
4. Confirm that the correct parent tag is assigned on the Overview tab and then click the **Update** button when you are finished.



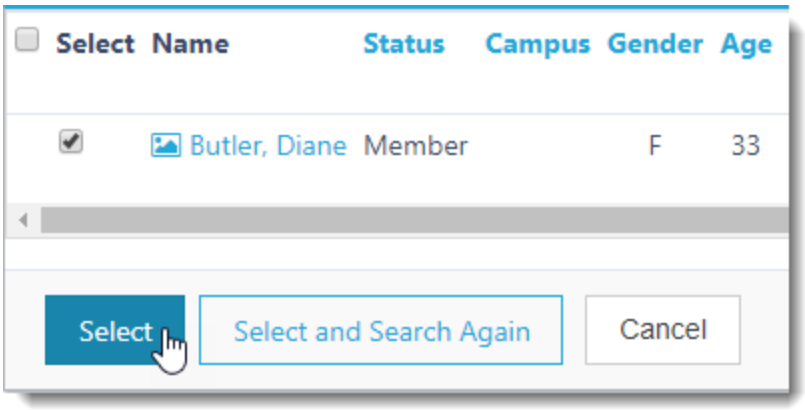
Members tab

After adding a Ministry tag, there are several tabs of information: Tag, Members, Security,

Occurrences, Attendance Summary, Roster (optional), and Documents. Let's take a look at how to add a record on the Members tab.

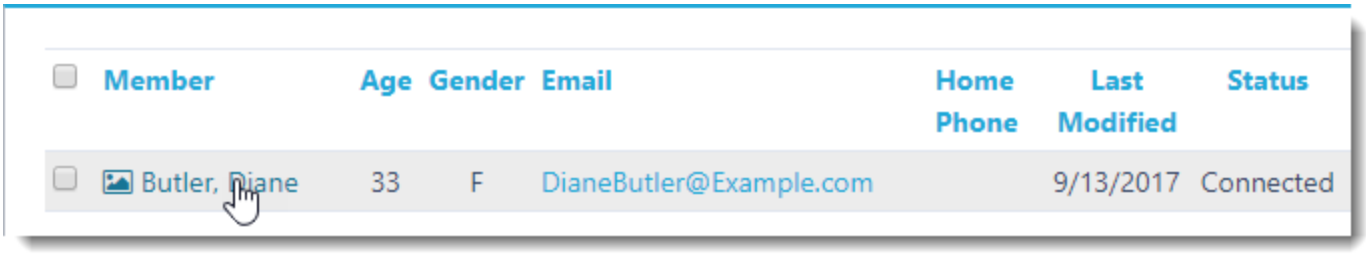


1. On the **Members** tab, click the **Add New Member** icon to search for names. After clicking the check box next to a name, click the **Select** button.



2. The member is displayed on the grid listing. Click the ***Name*** link to view an abbreviated personal information page.

NOTE: Records added directly to the tag have a default Status of "Connected".



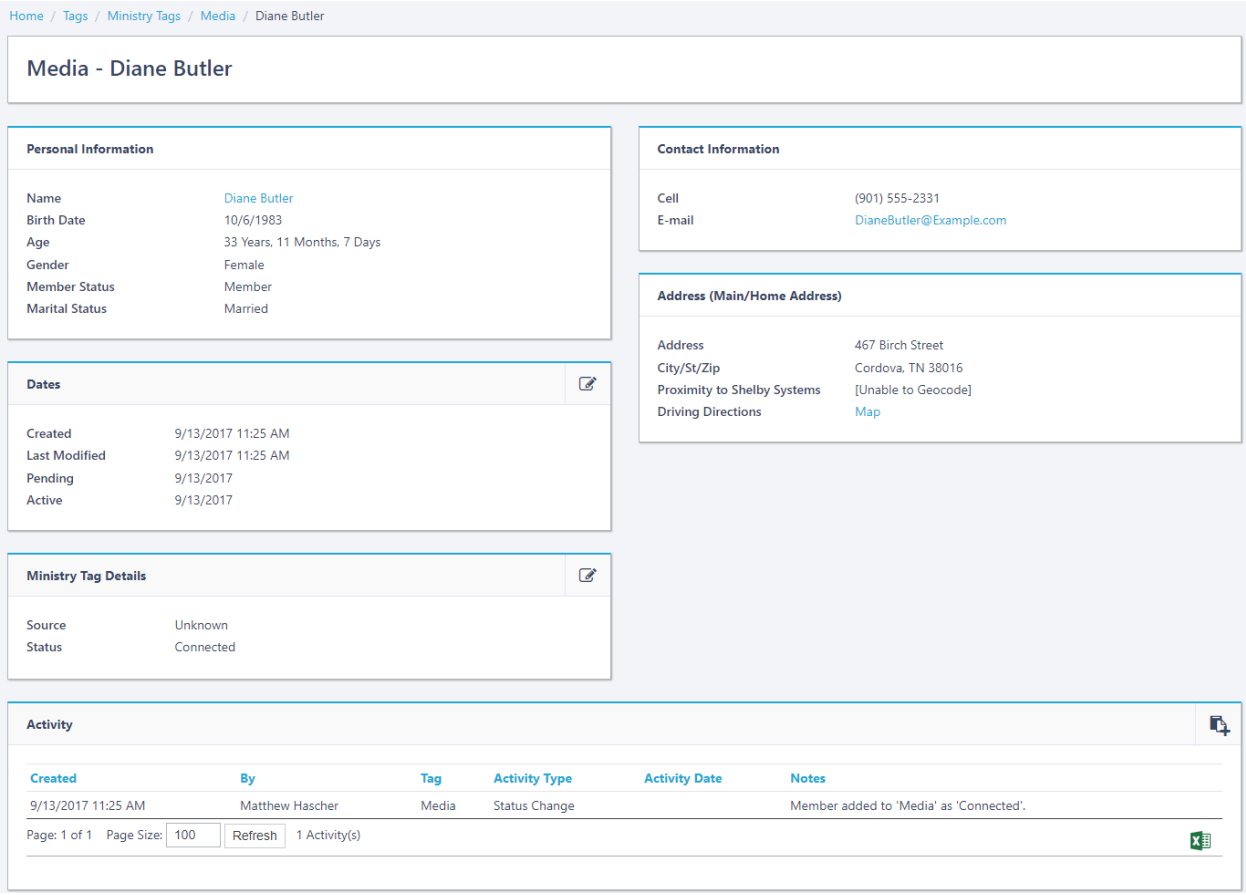
There are 6 areas of information that can be viewed and edited on the abbreviated personal information page.

- **Personal Information**: Displays the individual's name, birthdate, age, gender, member status and marital status.
- **Dates**: Use the available dates to identify the dates applicable to this tag for each individual in the tag.
- **Tag Details**: Use this section to identify the source of how the individual became aware of the tag (opportunity such as a Serving Tag), changing the individual's Tag Status, moving (transferring) the individual to another tag, and entering notes. When you move an individual

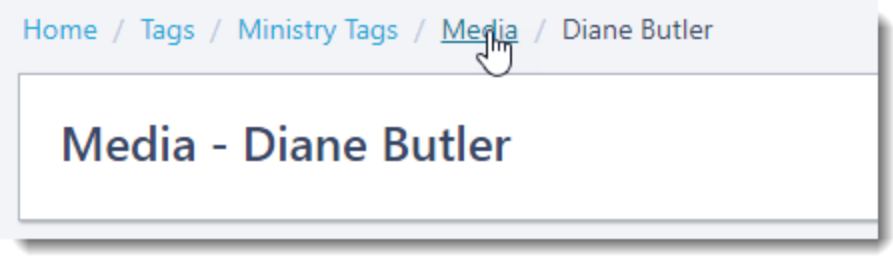
record to another tag, all activity notes are transferred. The Status field has the following options:

- **In Process**: Select this option if the member is not connected yet. It could be used to show that the member is interested in this ministry tag and/or that the member is in a process of being approved or assigned to the ministry tag.
- **Connected**: Select this option if the member is actively connected with the ministry tag.
- **Inactive**: Select this option if you want to keep the member assigned to the tag but do not want the member to display on reports or grid listings. This is a good choice if you want to keep the tag history for a member instead of deleting the member from the tag.

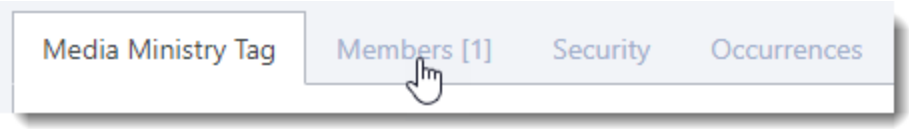
- **Contact Information**: This section displays the individual's active home numbers.
- **Address**: This section displays the individual's main/home address.
- **Activity**: Displays the activity associated with the tag for this member.



3. After viewing the abbreviated personal information page, click the tag in the breadcrumb trail (e.g. **Media**) to return to the Tag Information page.

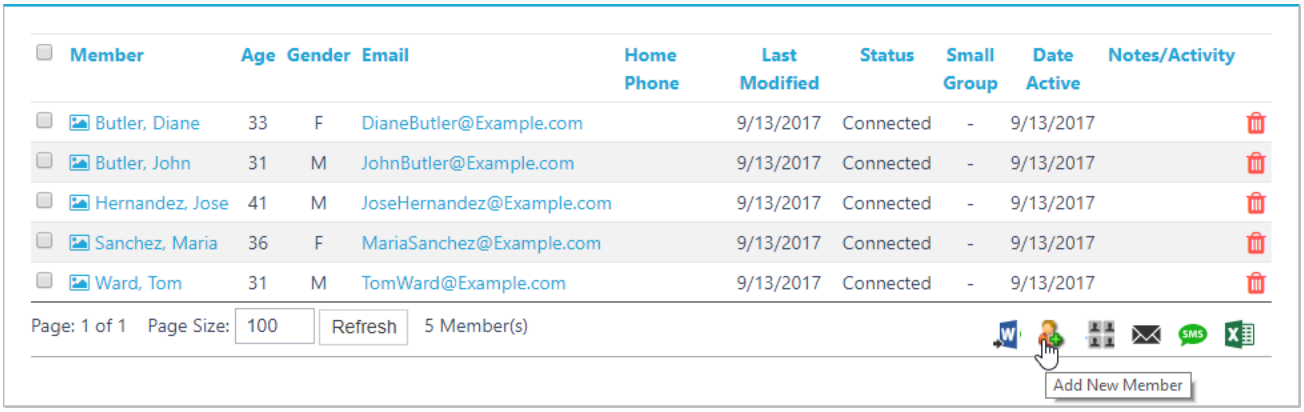


4. Next, click the **Members** tab. Notice the number of members added to the tag displays next to the Members label (e.g. **Members [1]**).

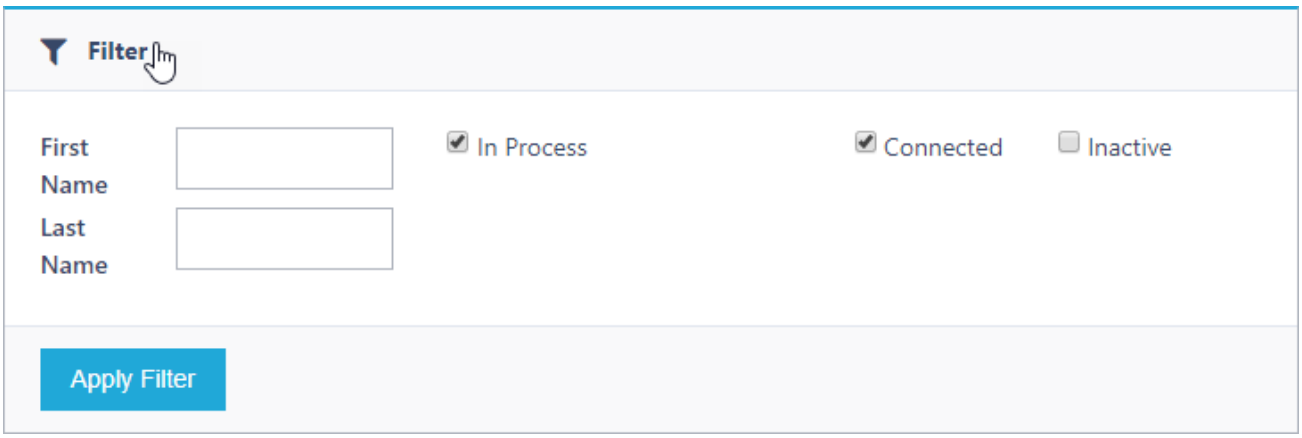


5. Continue clicking the **Add New Member** icon to add more members to this tag.

NOTE: The Members name displays the "Last Name, Nick Name". If the tag member does not have a Nick Name, then the First Name displays.

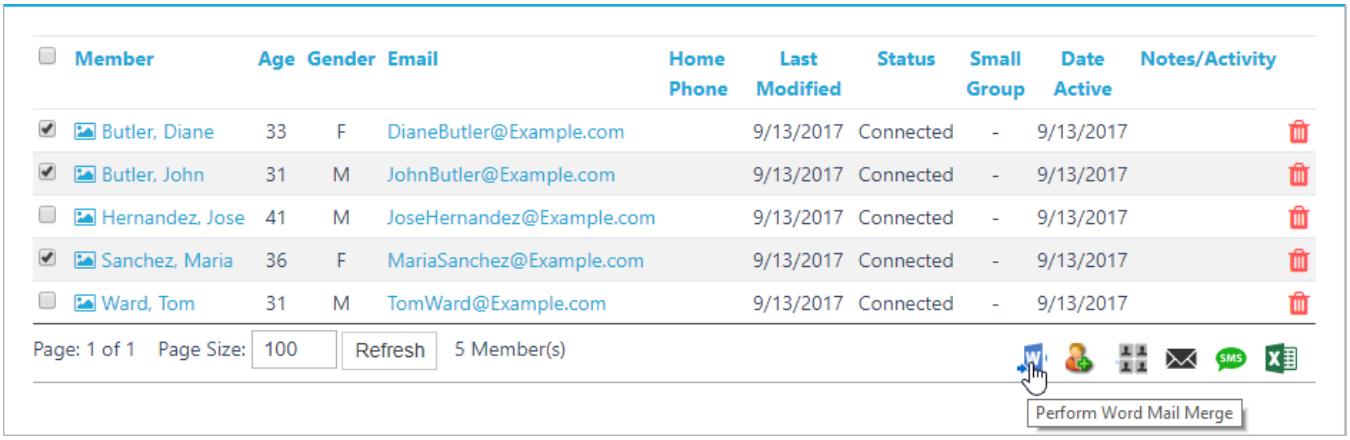


You can click on the **Filters** section of the Members tab if you want to filter which members display on the grid. Click the **Apply Filter** button after making your selections.



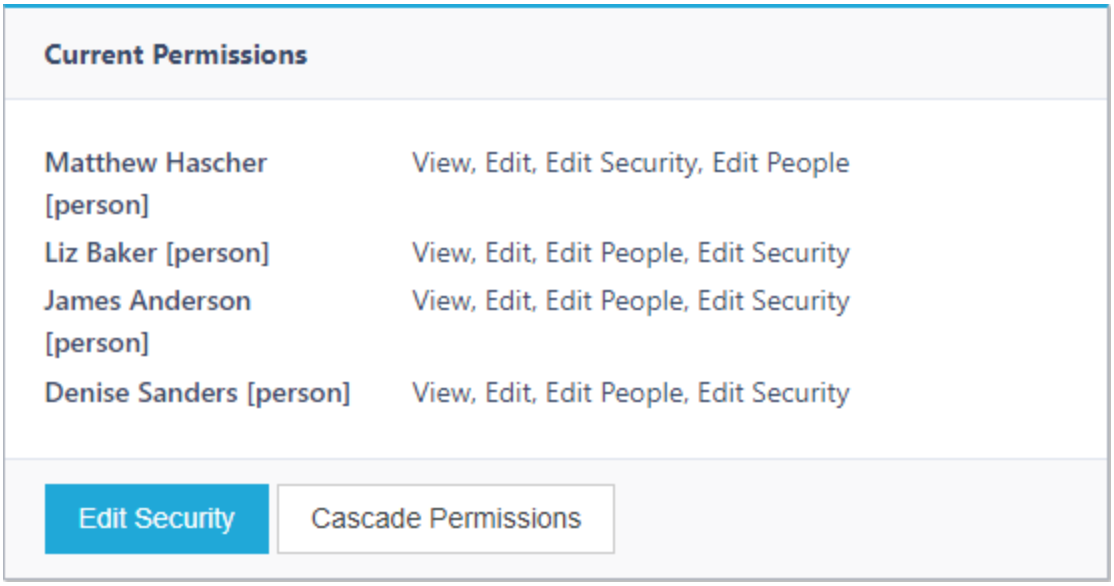
Action icons

Action icons are located at the bottom right-side of the members grid. These icons can be used to perform a Word Mail Merge, Bulk Update, Send Email, Send Text Message, or Export Data to Excel. After selecting members from the list, click the corresponding icon. (If no members are selected, then all members listed are used for the action.)



Security tab

The Security tab is used to control who has rights to view and edit a tag. The Security tab is available for Ministry, Serving, and Event tags. Personal tags are only viewable by the person who setup the tag; therefore security does not apply.



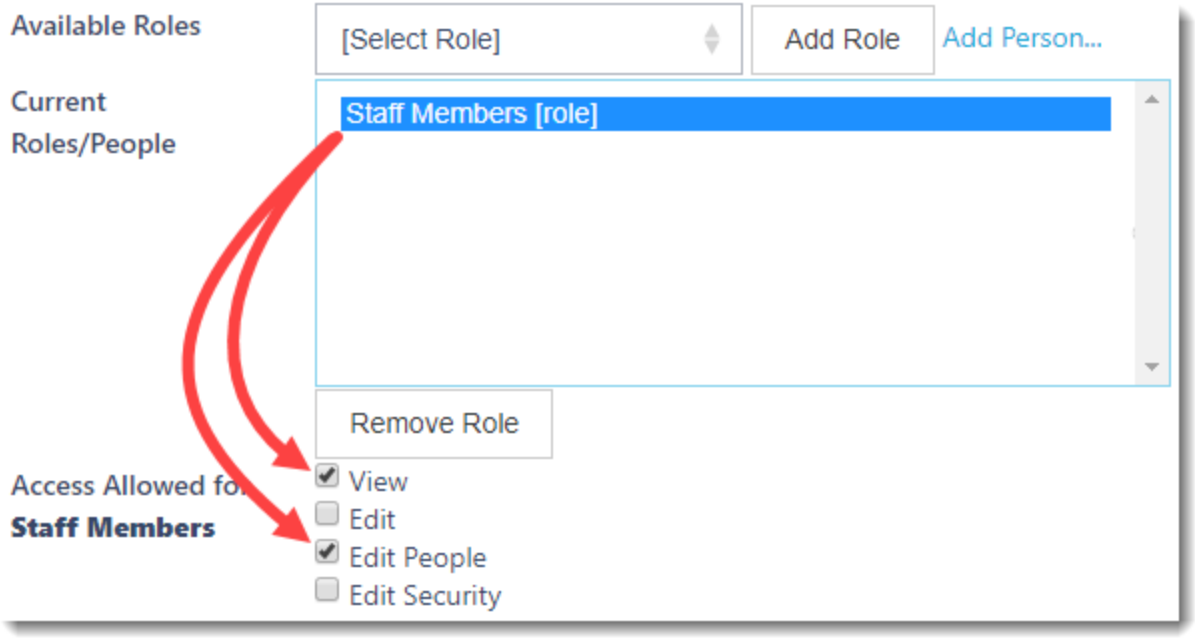
Setting up Security

1. Click the **Edit Security** button to setup or modify the security permissions for a tag.

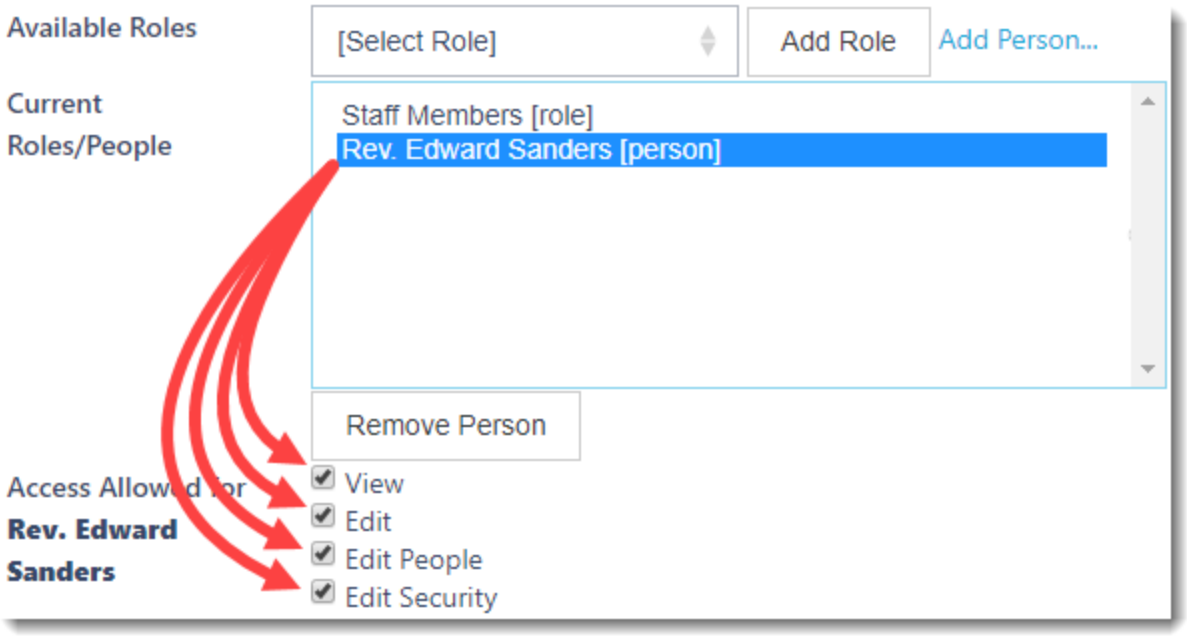
The security access is divided into 4 check boxes: View, Edit, Edit People, and Edit Security.

- **View**: This access allows users to the view the tag.
- **Edit**: This access allows users to edit the tag details.
- **Edit People**: This access allows users the ability to edit people in the tag.
- **Edit Security**: This access allows users the ability to edit security for the tag.

Each **security role** or **user** can be assigned security access independently of each other. For example, you can set the **Security Role** of "Staff Members" to only have ***View*** and ***Edit People*** access to a ministry tag.



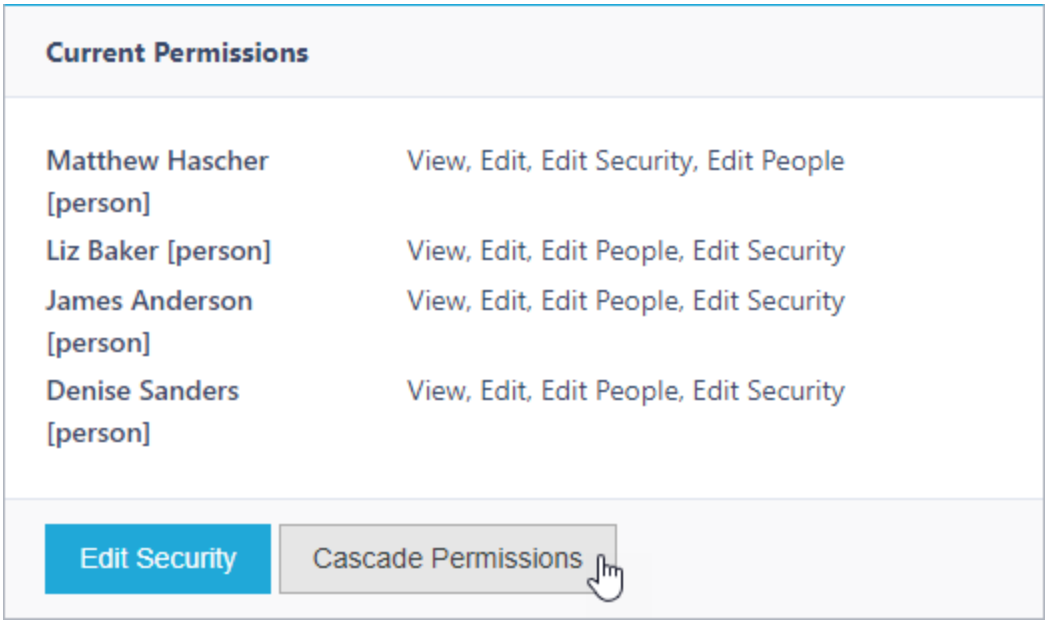
Or, you can set a **user** such as your pastor to have all (**View**, **Edit**, **Edit People**, & **Edit Security**) rights to a ministry tag.



IMPORTANT NOTE: Be sure you always have at least one user or security role in this list with at least **View** and **Edit Security** permissions. Removing ***all*** users with **View** permissions from this list causes this to be a 'lost' tag that no one can view. And, removing the **Edit Security** permissions prevents you from making any further changes to the security of this tag. (If no user is able to see the edit security tab, a global administrator will need to come and fix the security.)

Cascade Permissions

After security has been setup, you can click the **Cascade Permissions** button to set the same permissions to all the child tags under the current tag.



NOTE: After clicking the Cascade Permissions button, you can go to any of the child tags and further customize the permissions if you want. Just know that when you click the Cascade Permissions button, it overrides any of the permissions on the child tags with the permission assigned to the current tag. When creating a child tag, the child tag inherits the permissions of it's parent tag.

Occurrences tab

You can use Occurrences to track attendance and meeting dates (just like Group Occurrences).

- Click the **Add New Occurrence** icon to add a new occurrence.
- Click the **Generate Multiple Occurrences** button to add multiple occurrences.

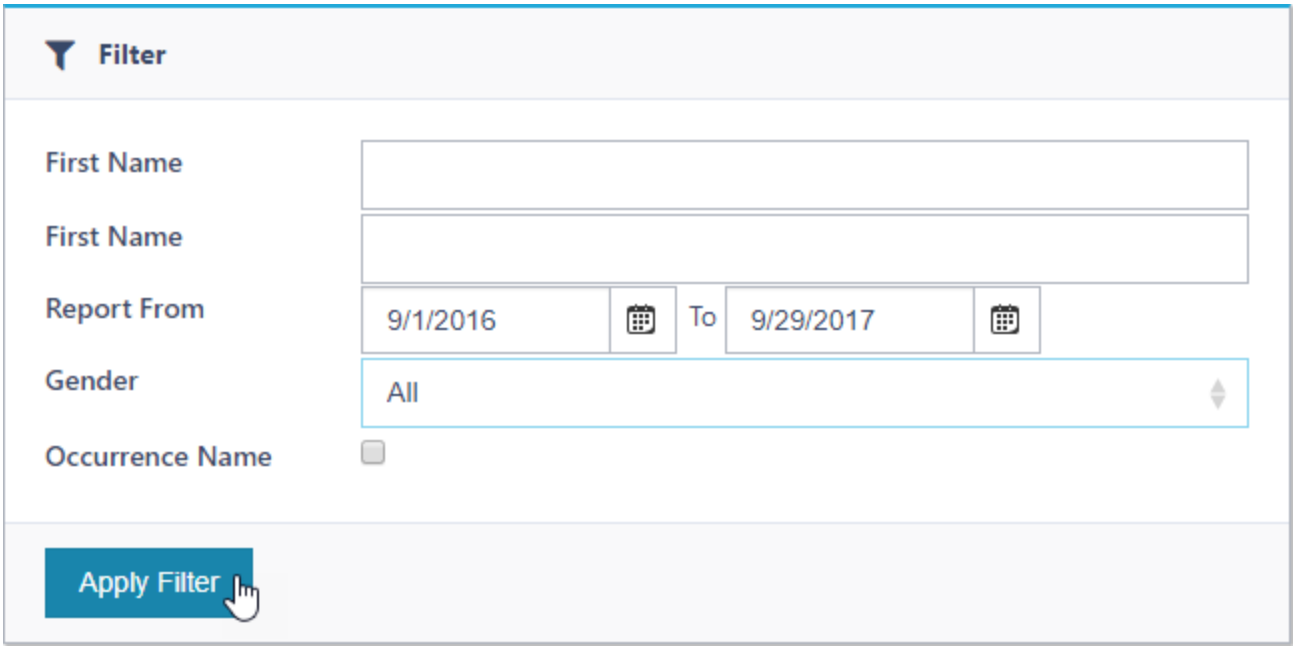
For more information about occurrences, see the Check-In > Occurrences page

Attendance Summary tab

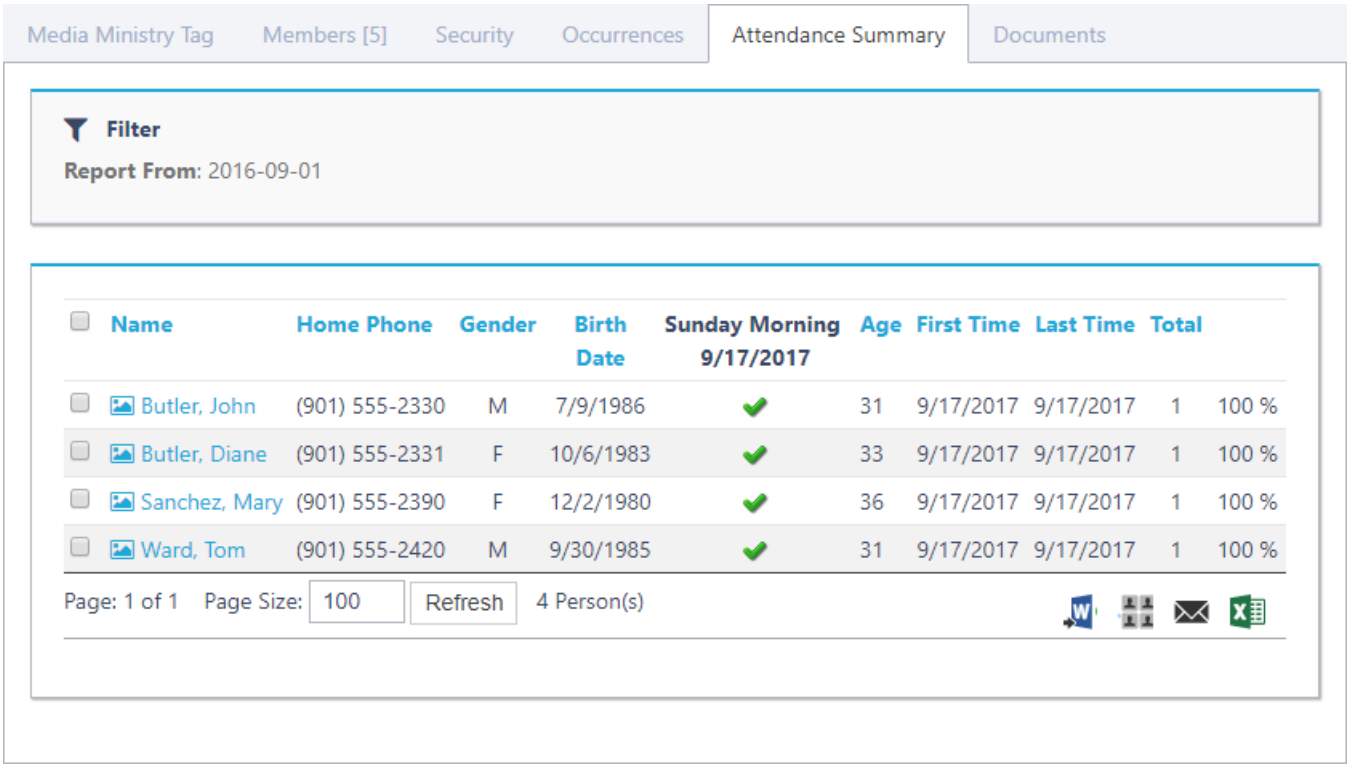
This tab displays a summary of occurrences for all people in the Tag or Group. There are filters that control which records display on this tab.

1. Click the **Filter** bar to change the date range or other criteria.

2. After setting the Filter criteria, click the **Apply Filter** button.



3. The Attendance Summary grid lists the members for the filtered criteria. Click the ***Name*** link to view an abbreviated personal information page.

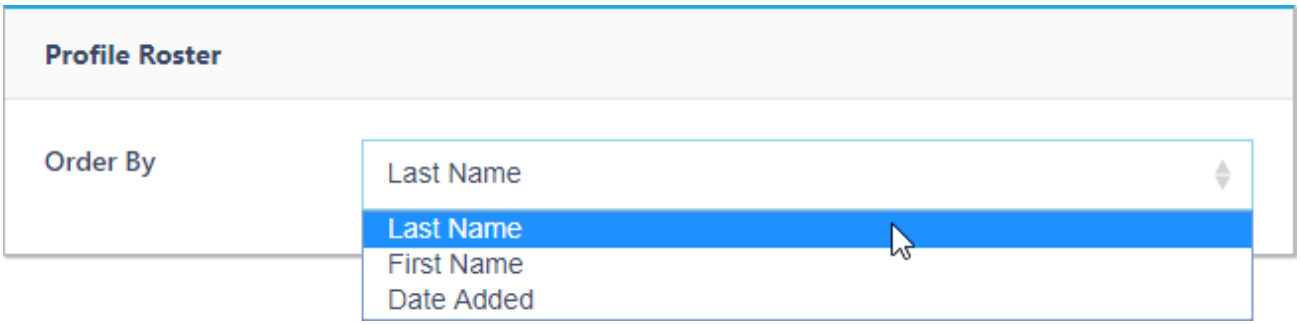


Action icons

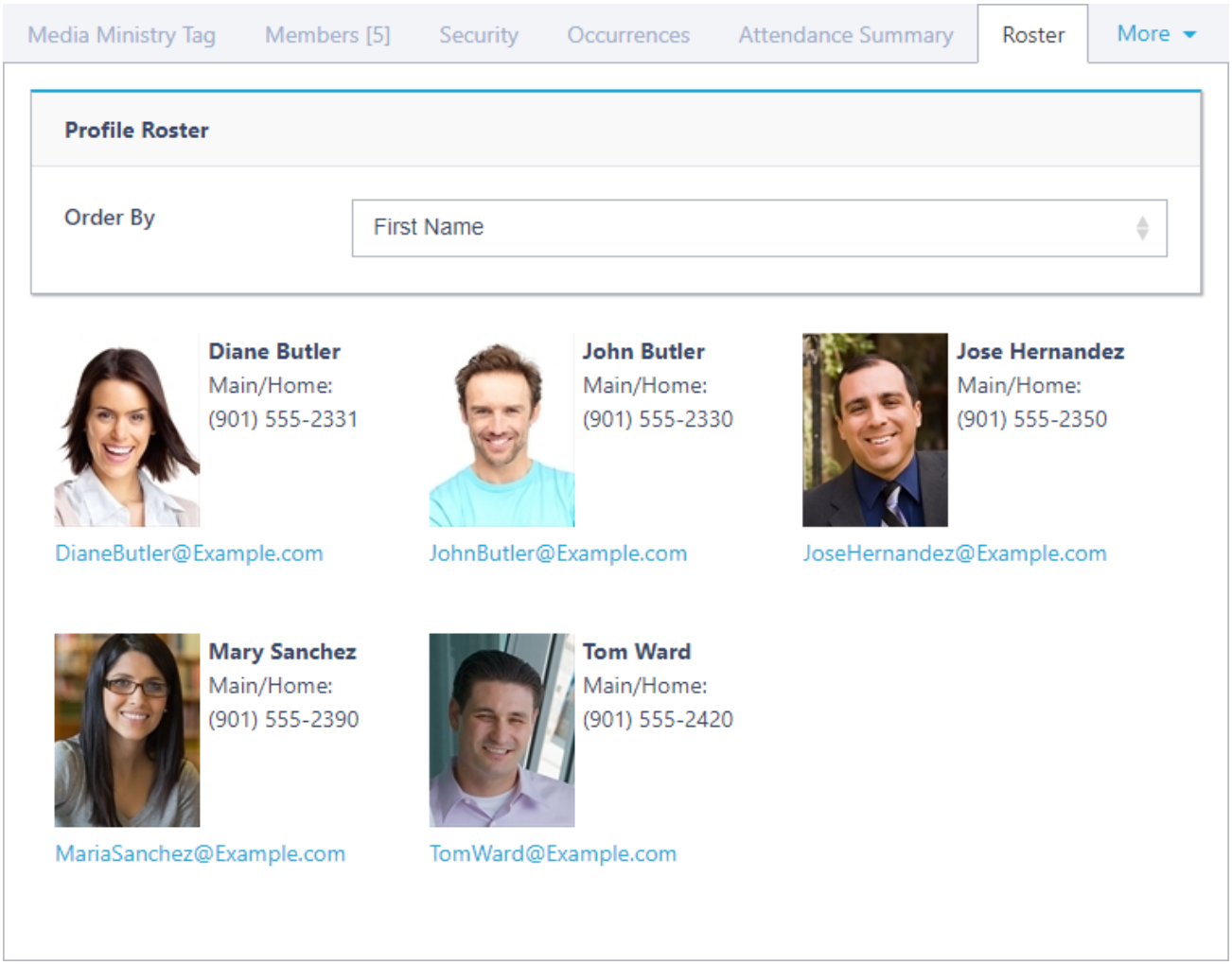
Action icons are located at the bottom right-side of the Attendance Summary grid. These icons can be used to perform a Word Mail Merge, Bulk Update, Send Email, or Export Data to Excel. After selecting members from the list, click the corresponding icon.

Roster tab

The **Roster** tab is available for Ministry, Personal, and Serving Tags. From this tab, you can sort the results by Last Name, First Name or Date Added.



Viewing the Roster is a quick way to see the pictures of those members assigned to a tag. The Main/Home phone number and email address are also displayed for each member.

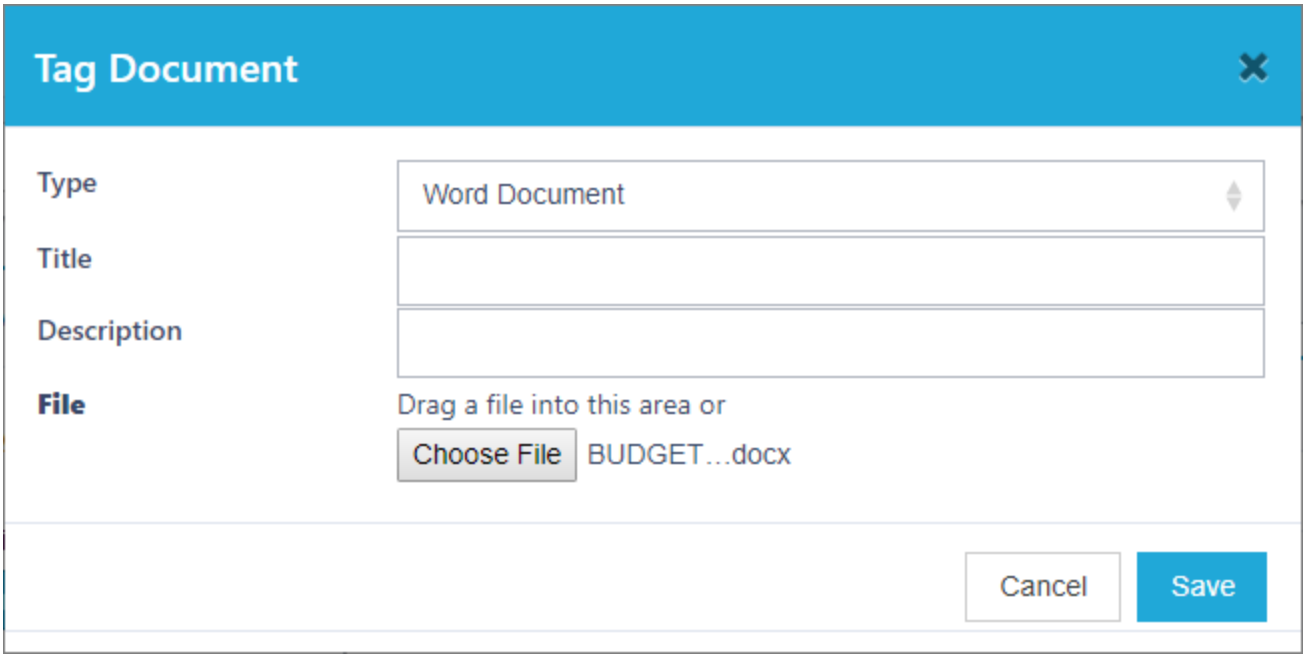


Documents tab

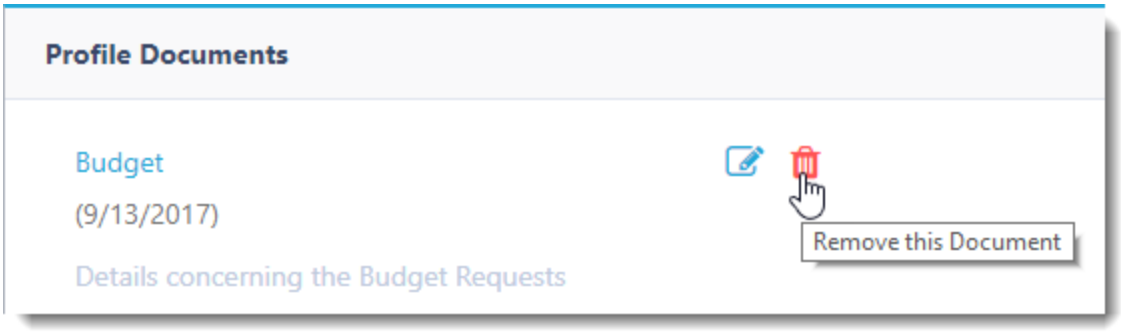
1. To add a document, click the **Add Document** button.

2. Specify the **File** location and then click the **Save** button.

NOTE: There are optional fields for the Type, Title, and Description.



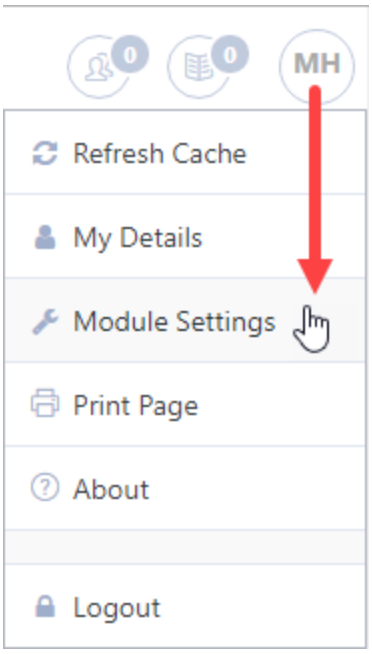
3. After a document is added, you have the following options:
   - Click the **Edit** icon to make changes to the Type, Title, Description, or File Location.
   - Click the **Delete** icon to remove the document.



Module Settings

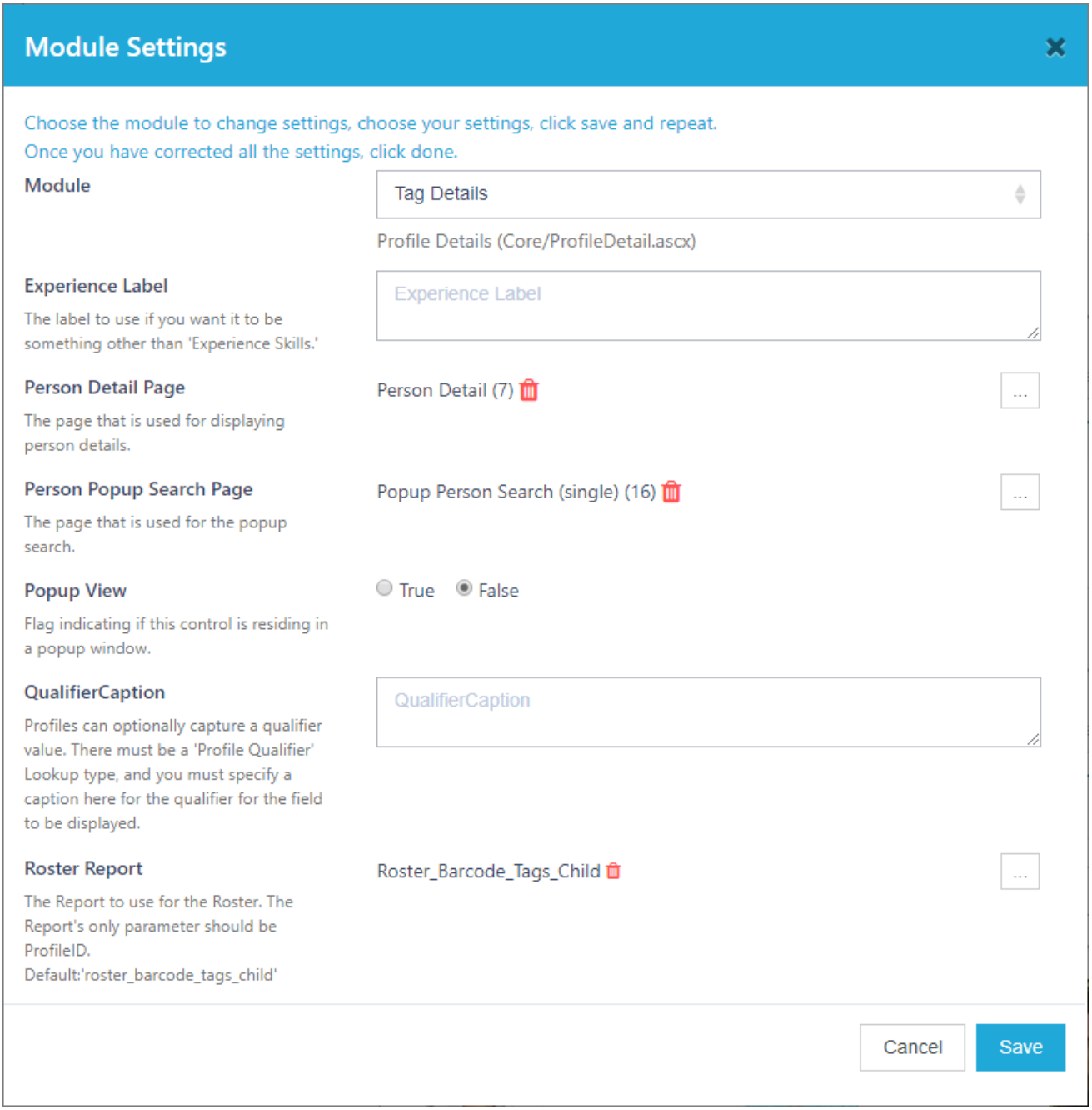
Module Settings control some of the aspects of the page you are currently viewing.

1. To change the Module settings, click the Navigation button (contains your initials) in the upper right-hand corner and then select the **Module Settings** option.



For your reference the **Tag Details** and **Tag Tab Control** module settings are listed below.

Tag Details



Tag Tab Control

Module Settings

Choose the module to change settings, choose your settings, click save and repeat.
Once you have corrected all the settings, click done.

Module
Tag Tab Control
Profile Tab Control (Core/ProfileMain.ascx)

Add Page
If specified, will redirect to a page for adding a new person and adding them to the profile. If not specified, will display a popup person search window.
(not set) ...

Allow Delete
Flag indicating if the the delete option should be displayed.
(•) True ( ) False

Allow Name Filter
Flag indicating if filtering by name should be available.
( ) True (•) False

Allow Update
Flag indicating if the the update option should be displayed.
(•) True ( ) False

Area Filter Parameter
If filtering by area, this is the querystring parameter name that will have the Area ID.
Area Filter Parameter

Attendance Type ID
The Attendance Type ID to report on.
Attendance Type ID

Attribute #1
First Person Attribute value to display

Attribute #2
First Person Attribute value to display

Attribute #3
First Person Attribute value to display

Attribute #4
First Person Attribute value to display

Columns
Number of columns to display.
Columns

Communication Page
The page that is used to create a new communication.
New Communication2 (21) ...

Default Occurrence Type ID
The default occurrence type ID that should be used when adding new occurrences.
5

Default Selections
The default filters to be selected.
No Contact
In Process
Connected

Serving Tags

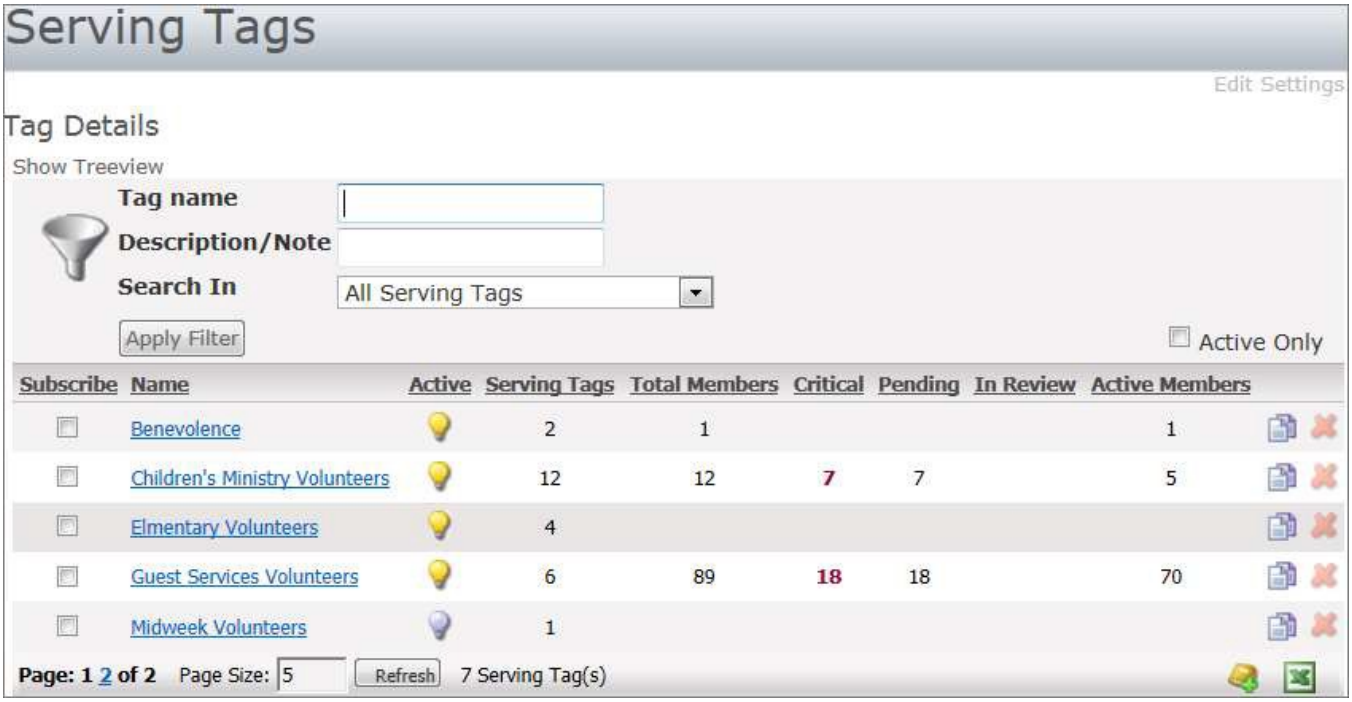
The **Serving Tag** page displays all serving tags. Use serving tags to manage volunteers in your organization such as guest service workers and children's ministry volunteers. You can add existing records directly to a serving tag, from individual person detail page or on the **Add Volunteer** page under Volunteer Tracking. When adding directly to the tag, records have the default status of "Connected." When adding from either the **Add Volunteer** page or an individual record, you can specify the status. Using Tag Status makes it easier for staff processing prospective volunteers. Additionally, customize Tag Statuses to fit your existing process.

Customization considerations before implementing Serving Tags:

If using **Serving Tag Reminder** feature:

- Make sure that the **ArenaProcessCriticalServing** agent job is set up with the necessary settings.
- Customize **Serving Reminder System Email**. The EmailFromName and EmailFromEmail and ReplyToEmail should be legitimate email information. Subject is required.
- **Arena URL** should be the URL to get to Arena so that it can put a link in the email.
- **ProfilePage** should be the page number for the page that you would go to in order to see the Tags (usually 25).
- **PersonProfilePage** should be the page number for the page that has the Profile Member Details module to see the detail of the individuals in the tags (usually 26 is default).
- Make sure that the **ArenaMailQueue** agent is also set up.
- Make sure that they can send emails from Arena using communications.
- Make sure that they can send emails "from" the same "from" email address that is set in the ArenaProcessCriticalServing agent job (check the log to make sure that they are not getting a relaying error).
- From the **Administration** menu, click the **Lookups** option and go to the **Tag Member Status** and check that the values that should trigger a reminder email are marked "y" in the Include as Critical column (note: it HAS to be "y" not "1", not "true", etc.).

- Make sure that the person that they are expecting to see the reminder about does have a red flag and is marked with either "no contact" or one of the statuses in the lookup that are marked to include in critical (see above).
- From the **Administration** menu, click the **Organization** option to check the setting for WarningProfileDays a person is set to yellow after the number of days in WarningProfileDays if no contact has been made.
- From the **Administration** menu, click the **Organization** option to check the for CriticalProfileDays a person is set to red/critical after the number of days in CriticalProfileDays have passed if no contact has been made. There is no system email for this; the agent has programming that writes the email.
- The email goes to the owner of the tag. Make sure that the tag has an owner.
- The email goes to the email address(s) on file for that person on their record in Arena. Make sure there is an email address on that record.
- Customize the **Add Profile Member** module on the **Add Volunteer** page to designate a default member status as users enter prospective volunteers.
- Customize **Critical Profile Days** and **Warning Profile Days Organization Settings** and start the Process Critical Serving agent. Once settings are in place, Arena sends an email to serving tag owners when the status of a prospective volunteer in a Serving Tag has not been changed in the number of days as specified in the Organization Settings. You need to add a valid Arena URL (e.g., http://arena.church.org/) to the Arena URL field in this agent.
- Customize the **Volunteer Signup System Email** that is sent to prospective volunteers when the individual signs up on the Arena-managed website or a staff member uses the **Add Volunteer** option.
- Customize the **Serving Reminder System Email**, start the Serving Reminder Agent and add future occurrences to applicable Serving Tags to use the option to email volunteers when they are expected to serve next. Emails are sent to connected tag members according to the occurrence date.
- Customize **Tag Member Status Lookup**. Use the Include as Critical “y” indicator for any existing or new status you want to trigger an email notification to the tag owner of prospective volunteers via arena-managed website or Add Volunteer. Keep in mind Connected, In Process and No Contact statuses are in use by other modules and settings. All other tag statuses apply only to Serving Tags. Critical and Warning are based on the Pending status. Review Tag Status is only applicable to Serving Tags.



- **Filter area**: Use the Tag name, Description/Note and Search In drop-down to search for a specific serving tag. Click the **Apply Filter** button to execute the search.
- **Active Only**: Select this check box to display only active tags.
- **Subscribe**: Check the box for any tag to create links to your Arena home page to the specific tag
- **Name**: Click a ***Name*** link to display the tag. The default tag is the Parent Tag.
- **Active** icon: The **Active** icon indicates active tags. An **Inactive** icon indicates inactive tags.
- **Serving Tags column**: This number represents the number of tags under the tag.
- **Total Members**: This number represents the total records in all tags regardless of status. Total number includes the current tag and any tags under the current tag.
- **Critical**: This number represents registrants with a critical status. Critical status is dependent on the Warning Profile Days and Critical Profile Days Organization Settings. See your Arena Administrator.
- **Pending**: This number represents new registrants.
- **In Review**: This number represents registrants flagged as in review.
- **Active Members**: This number represents all active registrants.
- **Copy** icon: Use this icon to copy a tag.
- **Delete** icon: Use this icon to delete a tag. You can delete tags at the lowest level on the

tag tree.

- **Add Page** icon: Use this icon to add a tag.

Create a New Serving Tag

1. From the **Tags** menu, click the **Serving Tags** option.
2. Click the ***Add*** link if this is the first Serving tag in your system or click the **Add New Serving Tag** icon on the bottom right-hand corner if you have existing tags.
3. On the **Overview** tab, enter a **Name**.
4. Select **Campus**, if applicable.
5. Enter **Start** and **End** time, if applicable.
6. Click the ***Change*** link to change the owner, if applicable.
7. Adjust **Relationship** strength, as desired.

Tag Details

Overview | Serving Criteria | Serving Details | Custom Fields | Member Custom Fields

Name 1st Weekend 9:30am Service Coneheads **Active** ☑

Parent 1st Weekend ...

Campus Main Campus

Default Start Time

Default End Time

Owner Jane Sample
Change... Remove

Relationships
Strength Between Owner & Members: Weak Moderate Strong
Strength Between Members: Weak Moderate Strong

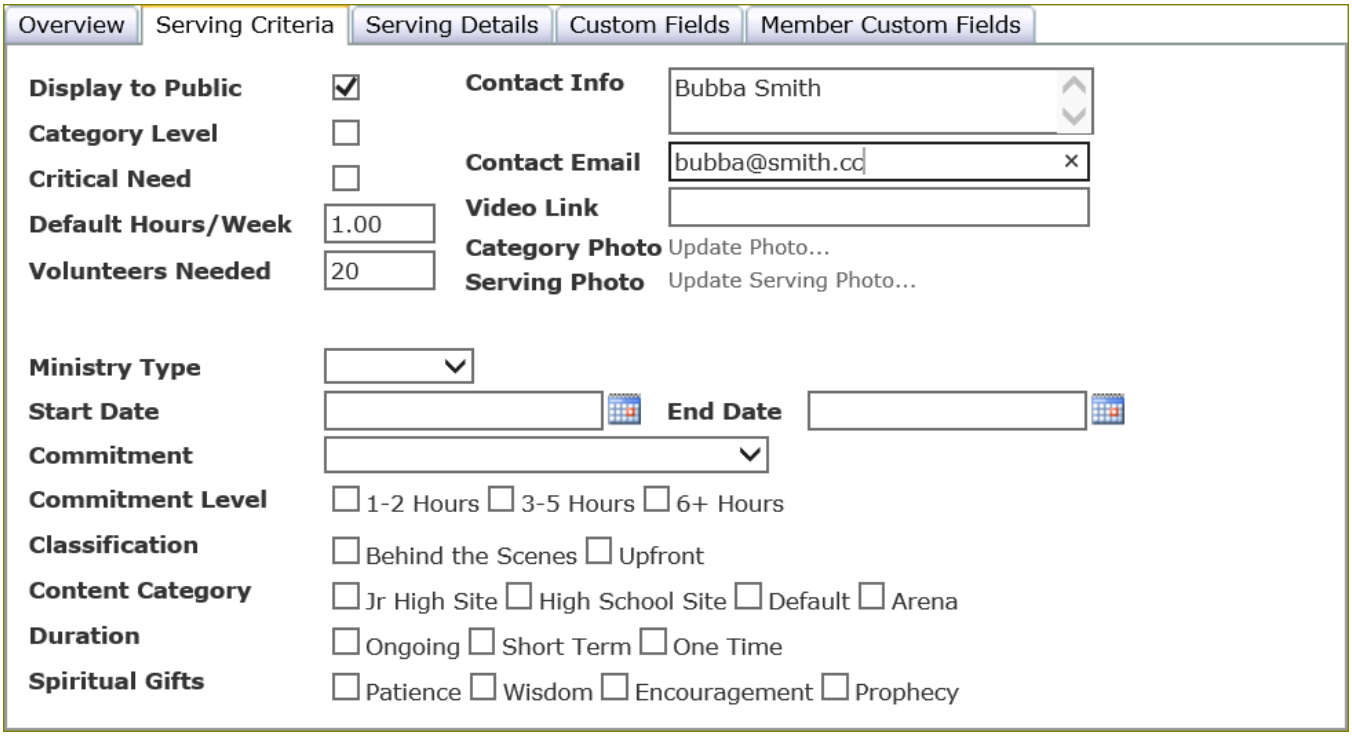
Internal Notes
This is for 1st Sunday ONLY.

Custom Fields
Sample Custom Field

Update Cancel

8. Click the **Serving Criteria** tab.

9. Enter and select criteria, as desired.



10. Select the **Display to Public** check box to display this serving opportunity on your Arena-managed website.

11. Select the **Category Level** check box to make this tag a category by which to filter serving tags. Arena displays all child tags of the current tag that are set to display and available positions.

12. Select the **Critical Need** check box to denote if this tag is a critical need. If selected, the tag displays on the initial **Serving Opportunities** page of your Arena-managed website.

13. Enter the **Default Hours/Week** for this serving position. If hours are set to "0" this could affect lists that you search by the number of hours someone is serving.

14. Enter the **Volunteers Needed** for this serving position. This is applicable for Serving Tags you want to make available on your Arena-Managed external portal.

15. Enter the name of the contact person in the **Contact Info** field. This name displays on your Arena-managed website.

16. Enter the email address of the contact person in the **Contact Email** field. This email address displays on your Arena-managed website.

17. Enter the file path to promotional or training video in the ***Video*** link field.

18. You can upload a **Category Photo** to display on the **Volunteer Opportunities** page of the member portal. This photo displays when the tag is marked Category.

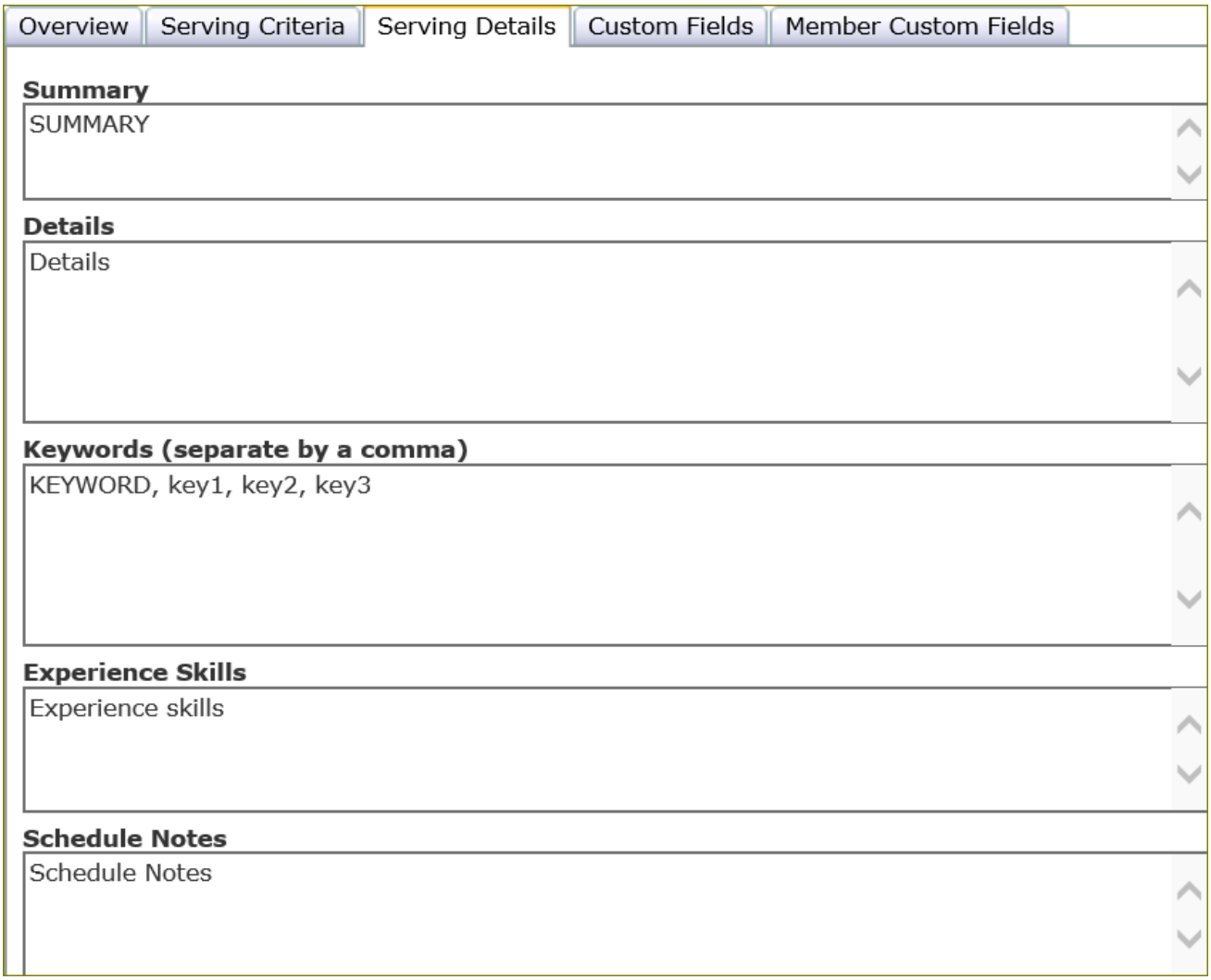
19. You can upload a **Serving Photo** to display with the Serving Tag on the Arena-managed **Serving Opportunities** page.

20. Select the **Ministry Type**.

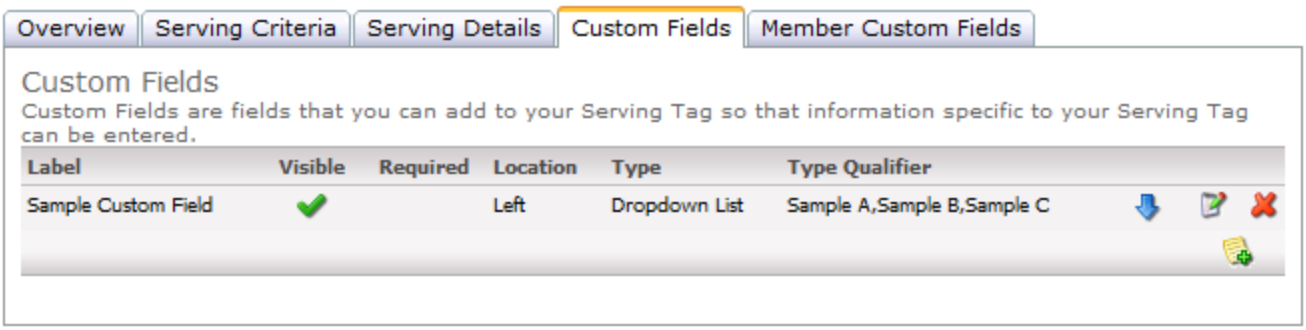
21. Enter the **Start** and **End Dates** for this serving position.

22. Select **Commitment Level**, **Weekly Commitment**, **Timeframe**, **Classification**, **Content Category**, and **Duration**. These criteria allow website users to search and select a serving opportunity. You must select a Content Category for the serving opportunity to be available on your Arena-managed website for registration purposes. These options will vary. See your Arena Administrator regarding customization for your organization.

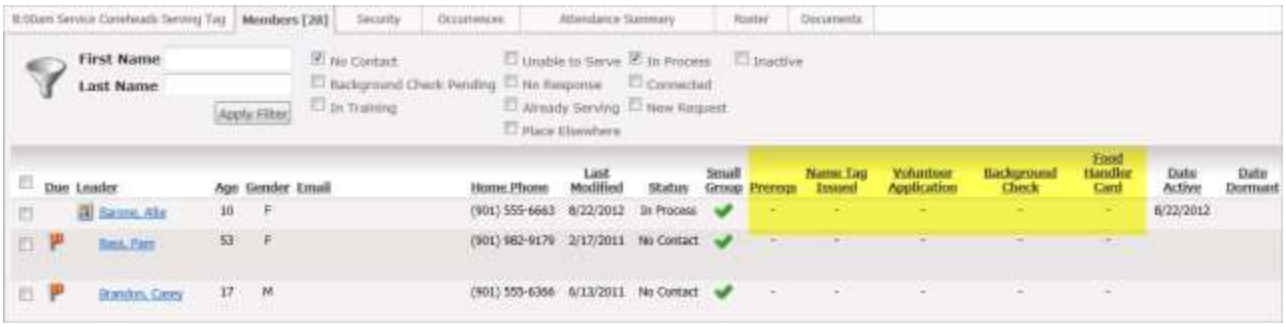
23. Select the **Serving Details** tab. Summary, Details, Experience Skills and Schedule Notes display once the prospective volunteer selects the position. Prospective volunteers can also enter keywords that can be used.



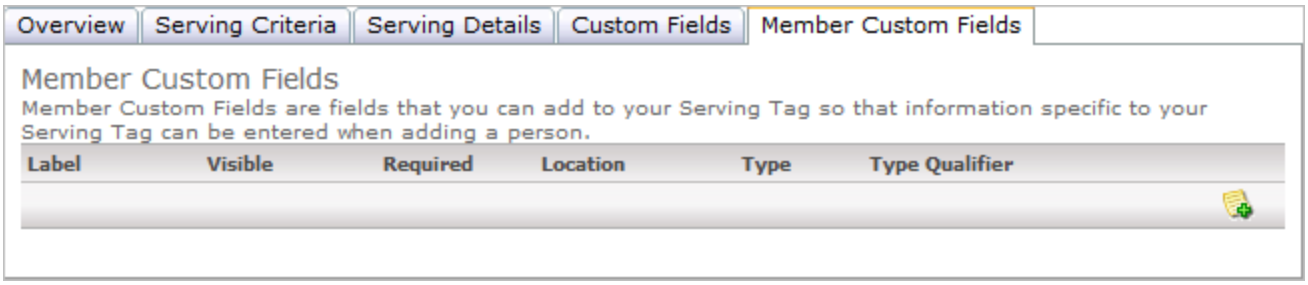
24. Click the **Custom Fields** tab to create custom fields.



25. Custom fields you elect to **Show on List** display on the **Serving Tag** page.



26. Click the **Member Custom Fields** tab.

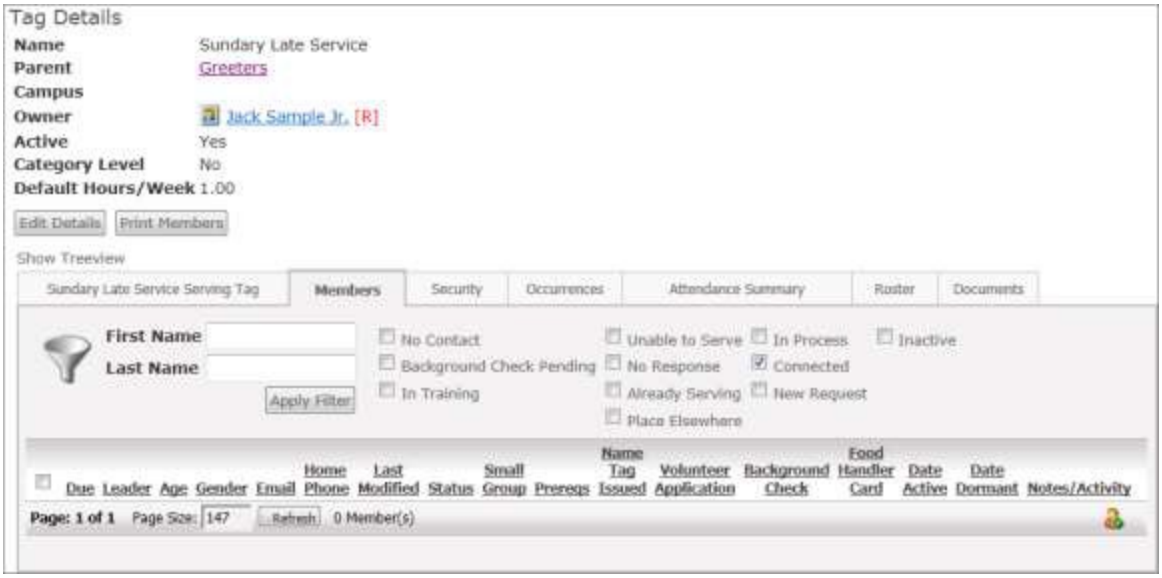


27. Add custom fields, as desired. See detailed instructions in the Ministry Tag section of this help file.

28. Click the **Update** button.

Add a Record To a Tag

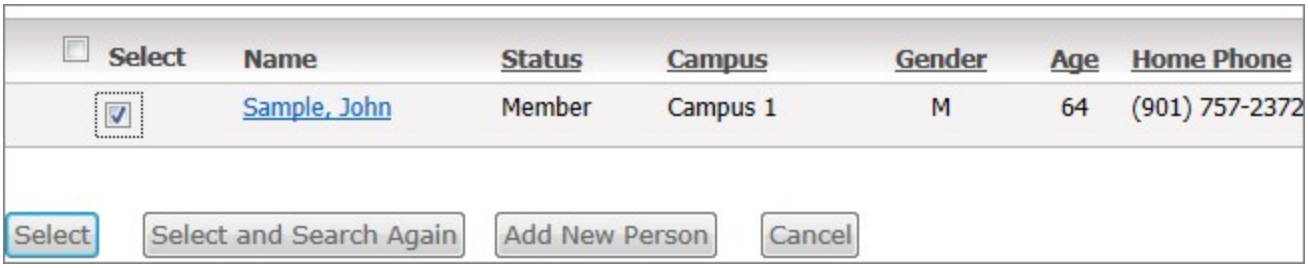
1. Select the **Tag**.



2. Click the **Add Person** icon.

3. Use the **Person Search** box to search for the record.

4. Select the record(s).

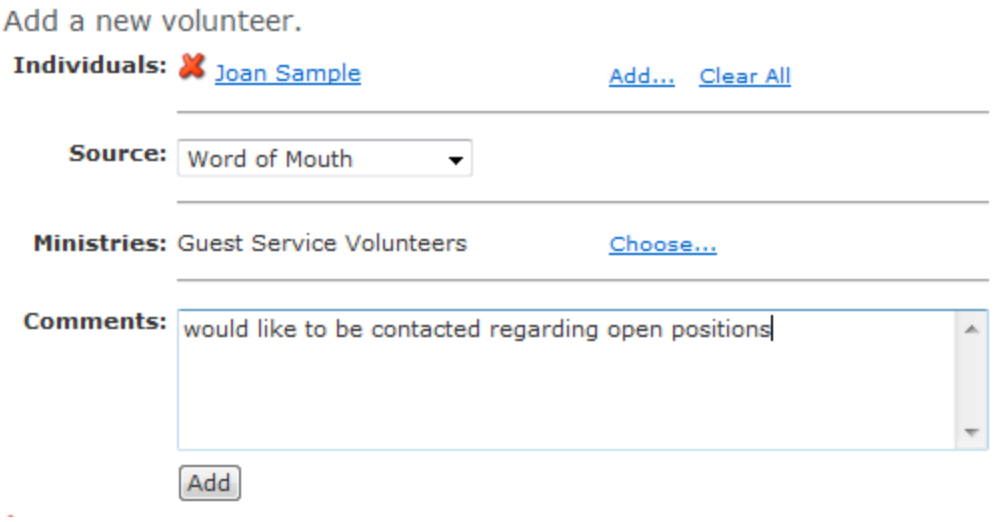


5. The **Tag Member** page displays.

6. Use the filter boxes to display the record. The default tag status is **Connected**.

Add an Existing Record as a Registrant to a Serving Tag

1. From the **Volunteer Tracking** menu, click the **Add Volunteer** option.
2. Click the ***Add*** link to search and select for the existing record.
3. Select the **Source**, to identify how the person became aware of the serving opportunity. The **Source** option is a customizable Lookup. See your Arena Administrator for more information.
4. Click the ***Choose*** link to search and select a Serving tag.
5. Enter **Comments**, as desired.



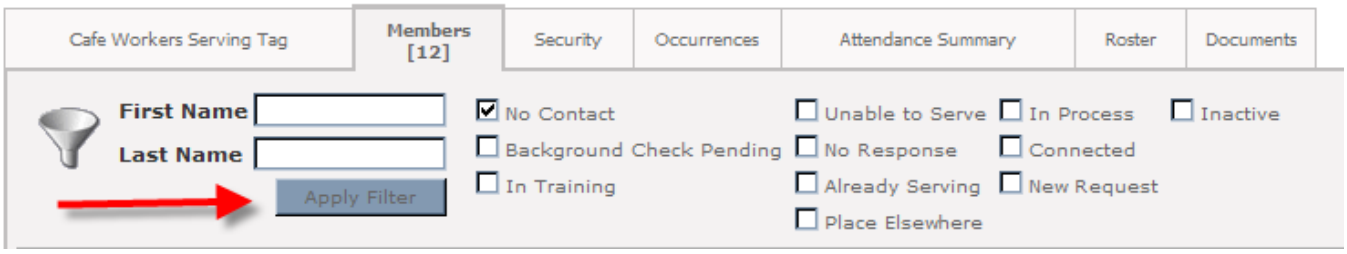
6. Click the **Add** button. Arena adds the person to the tag, with the default status of **In Process**.

Tag Sorting

On the tag page, you can sort by any single column. Click a column heading to sort in ascending or descending order.

Tag Filters

On the tag **Members** tab, you can filter members by status. Tag status options may vary. Arena marks all "No Contact" status records with a yellow/red flag, based on the Critical Profile Days Organization Setting value.



- **No Contact** - This is the default status applied to new prospects. You should contact the prospect within one week. Once you make contact, you can change the status to 'In Process' or whatever is the next step in your organization's process.
- **In Process** - This status applies to contacted prospects; the person's response is pending.
- **Background Check Pending** - This status is used for prospects who have committed to serve, but must have a background check approved before starting to serve.
- **Unable to Serve** - This status is for prospects that are not able to serve in the ministry for which they originally volunteered. When changing the status to 'Unable to Serve' you must provide a reason. The volunteer coordinator reviews these prospects and removes them.
- **No Response** - This status is for prospects who do not respond to your efforts to contact them.
- **Already Serving** - This status applies to prospects who tell you that they are already serving when you contact them. Be sure to record where the prospect is serving in the reason field. The volunteer coordinator reviews these prospects and removes them.
- **Place Elsewhere** - This status is if the prospect wishes to serve in a different area.
- **Connected** - This is the default status when you add a record directly to the tag.
- **Inactive** – Use this status to identify a volunteer as inactive. For example, if there is a volunteer on your team who is taking a month's vacation change the person to inactive. When the person returns update him back to active. If your organization uses online volunteer registration, this also creates an opening for this position.

Steps to View the Tag Tree

1. From the **Tags** menu, click the **Serving Tags** option.
2. Click the ***Show Treeview*** link.
3. Click the **Expand** ⊞ icon to expand the tag tree.

Event Tags

Event Tags are used for tracking events that have a begin and end date, can appear on your Arena-managed calendar, and have the option to accept registration fees. Events have the option to add Sub-Events to track individual classes or activities that are part of the event.

This Help page contains the following sections:

Add a New Event Tag

Add an Event to the Public Calendar

Set up the Registration information

Add Custom Fields to an Event Tag

Sub-Events tab

Registrations tab

Registrants tab

Security tab

Occurrences tab

Attendance Summary tab

Transactions tab

Documents tab

Considerations for Event Tags

Manually Add a Payment for a Registration

Apply a Refund

Assign a Registrant to a Sub-Event Tag

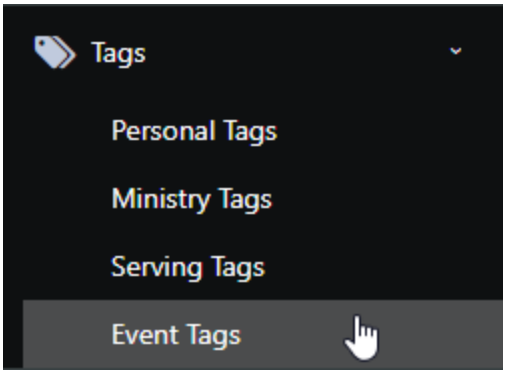
Copy a Tag

Resend an Email Confirmation to a Registrant

Add a New Event Tag

Follow the steps below to add a new event tag.

1. From the **Tags** menu, click the **Event Tags** option.



2. Click the **Add New Event** icon in the lower right-hand corner.

3. Enter the Event Details as appropriate for your event.
   - **Name**: The name entered here displays on the Arena-managed website calendar. Consult your payment gateway provider when using special characters.
   - **Active**: Select this check box to make the event active or inactive. It must be active to be

available on the Arena-managed external portal.

- **Update Event Photo...**: Click this button to search for and select an image file. Click the Update button after selecting your image.
- **Parent**: This field displays the tag which is the above the current event tag, in hierarchal structure. You can move an event tag by selecting a different parent event tag.
- **RSVP Event**: Select this box if you would like to allow users to register multiple people without requiring data to be entered for each person. This option is available for Event Tags with no Sub-Events.
- **Sub-events Enabled**: Select this box to create sub-events. Once an Event tag has the **Sub-Events Enabled** check box checked, then there is only one level of child events that can be added under the Event tag.
- **Sub-events Type**: Select which type of sub-events to make available for this event.
- **Campus**: Select campus if applicable. (A Campus can be added to the drop-down list -> From the Administration menu, select Organization under the <CONFIGURE> heading. Click on the ***Organization*** link listed under the **Organization Name** column. Next, click the Campuses tab to view the list of campuses. Click the **Add New Campus** icon to add a new campus.)
- **Owner**: By default, the user creating the event is the owner. Click the ***Select*** link to change the owner.
- **Peer Relationships**: Set the relationship strength. The default Weak position does not calculate.
- **Event Type**: Select the type of event. This is a customizable Lookup to organize your Arena-managed website calendar(s).
- **Start Date**: Enter the date and time that the event starts.
- **End Date**: Enter the date and time that the event ends.
- **Location**: Select the location for this event. This is a Check-In Location. (From the **Check-In** menu, select the **Locations** option. Click the **Add New Location** icon to add a new location.)
- **Projected Attendance**: Enter the number of people you are expecting for this event. You can limit registrants on the **Registration Details** tab under Registration.
- **Display this event on a person's detail page ONLY if they actually ATTEND this event**: Select this check box if you want to display this event on the Person Detail page of the registrant. The event displays once you either manually record attendance, or use the bar code scanner upload or Arena Check-In.

- **Summary**: The event Summary displays on your organization's Arena managed website.
- **Event Details**: The Event details display on your organization's Arena managed website.
- **Internal Notes**: The Internal Notes are only accessible to staff.

Event Details

Name Camp Katowee - Summer 2018

Active ☑

Update Event Photo... | Remove Event Photo

Parent [Events]

RSVP Event ☐

Sub-events Enabled ☑

Sub-events Type Required (user must choose at least one sub-event)

Campus Camp Katowee Campground

Owner Matthew Hascher Change... Remove

Relationships Strength Between Owner & Registrants

Weak Mod... Strong

Strength Between Registrants

Weak Mod... Strong

Event Type Camp

Start Date 7/7/2018 8:00 AM

End Date 7/27/2018 11:00 AM

Location Camp Katowee Campground - Administration Building - Registration Desk

Projected Attendance 200

☐ Display this event on a person's detail page ONLY if they actually ATTEND this event

Summary Kids learn courage, discipline, and spiritual knowledge

Event Details

The camp is held every year for young people to grow spiritually while experiencing experiencing God's natural creation. There are activities and times of study.

Design | HTML | Preview

Internal Notes

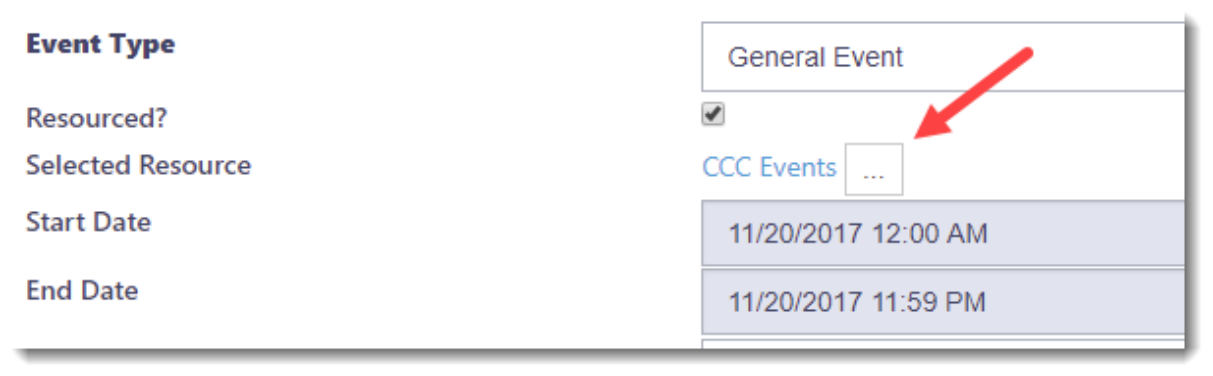
4. Click the **Update** button when you are finished entering the Event Details.

eSPACE

There are two options that appear on the Event Details tab if you have eSPACE set up. These options are **Resourced?** check box and the **Selected Resource** field.

If you unlock a resource in **eSPACE**, make and save changes to the resource, then a message appears next to the "Selected Resource" field on the Event Details page that lets you know the resource is no longer connect to the Event tag.

Click the **Search** ... icon to reconnect the eSPACE resource with the Event tag.

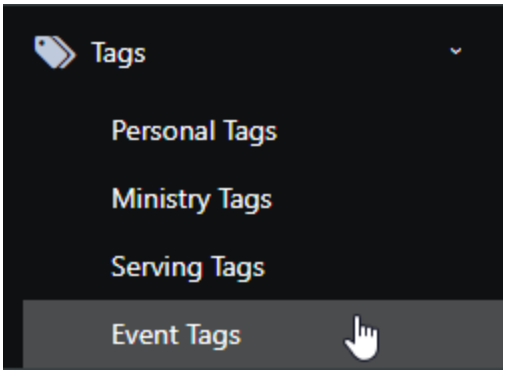


Add an Event to the Public Calendar

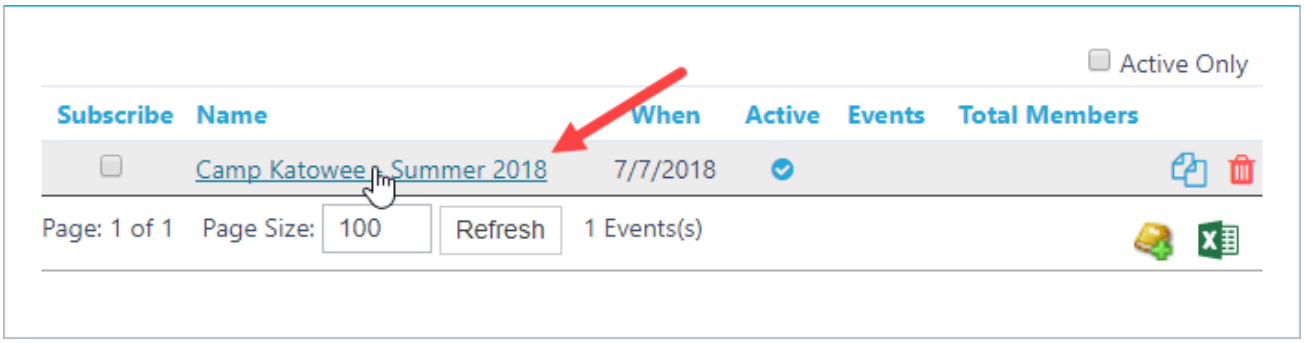
Events are added to the Public Calendar by adding at least one occurrence to the event tag and then specifying the Event Calendar Details. The following steps guide your through entering an occurrence and then specifying the Event Calendar Details.

Enter an Occurrence

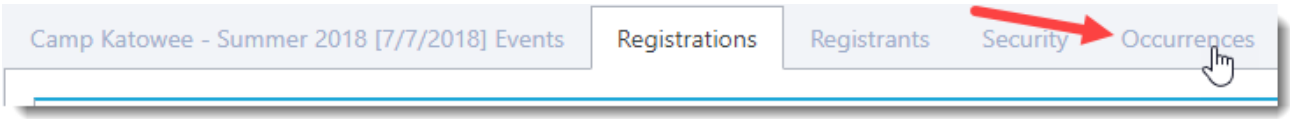
1. From the **Tags** menu, click the **Event Tags** option.



2. Click on the **Event** link for the event that you would like to edit (e.g. Camp Katowee - Summer 2018).

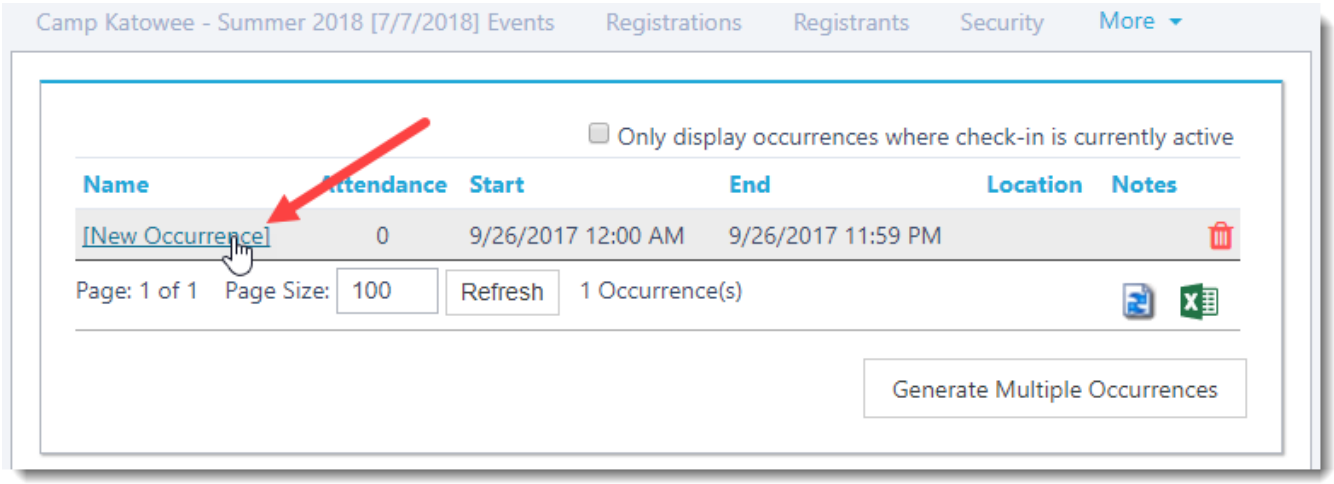


3. Select the **Occurrences** tab.

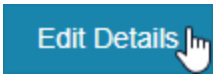


4. Click the **Add New Occurrence** icon.

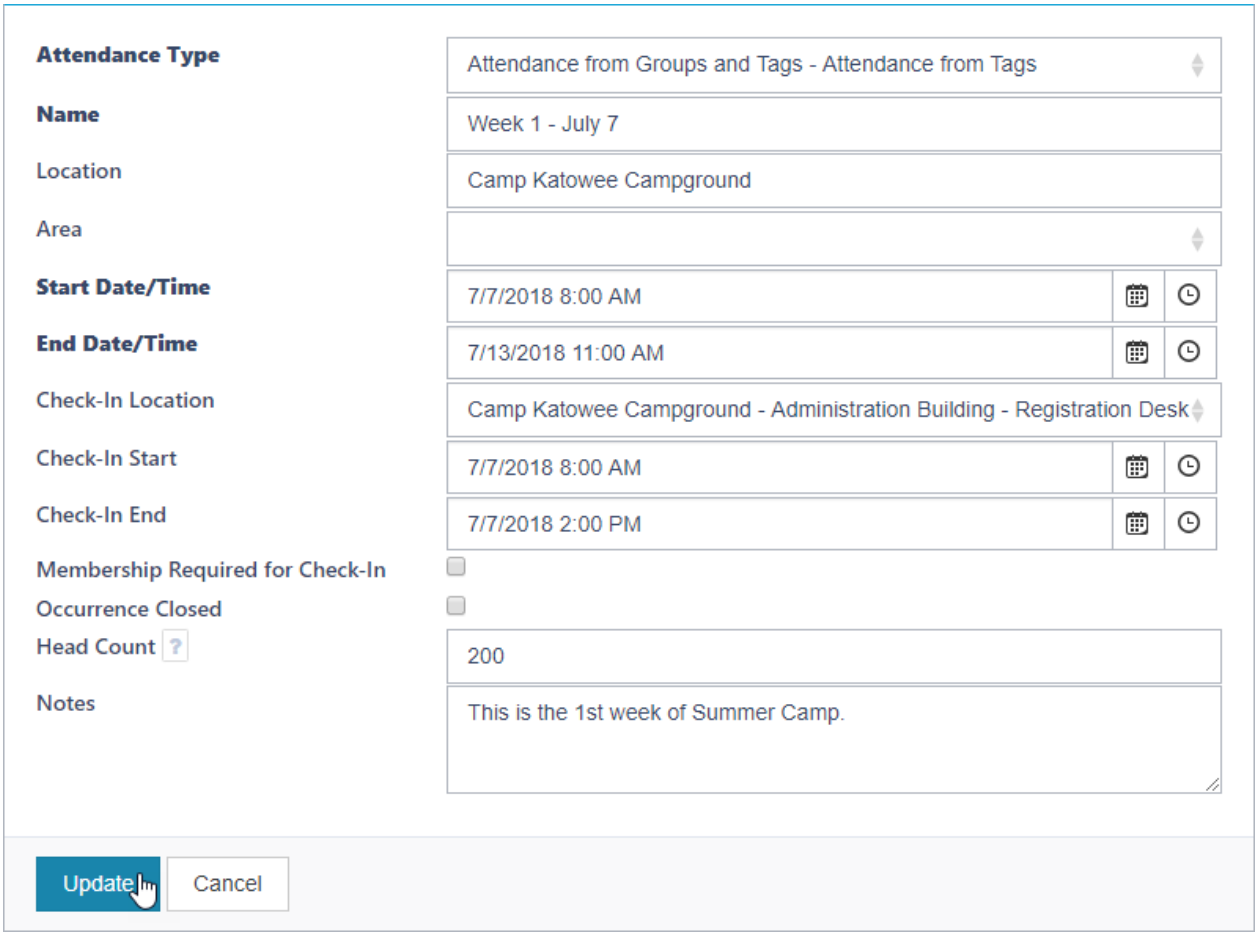
5. Click on the **[New Occurrence]** link that appears on the Occurrences listing.



6. Click the **Edit Details** button.



7. Enter the Occurrence information as appropriate for your event and then click the **Update** button when you are finished.
   - **Attendance Type**: Select the Attendance Type from the drop-down list. (Attendance Types can be added or modified from the Check-In menu. Select Attendance Type Categories then click the Attendance Types link for your related Category.)
   - **Name**: Enter the name of the occurrence. (e.g. Week 1 - July 7)
   - **Location**: Enter the location of the occurrence.
   - **Area**: Select an Area from the drop-down list.
   - **Start Date/Time**: Enter the date and time when the occurrence begins.
   - **End Date/Time**: Enter the date and time when occurrence ends.
   - **Check-In Location**: Enter the location where registrants go to check in.
   - **Check-In Start**: Enter the date and time when the Check-In process begins.
   - **Check-In End**: Enter the date and time when the Check-In process closes.
   - **Membership Required for Check-In**: Select this option if Membership is required to check in.
   - **Occurrence Closed**: Select this option if the occurrence is now closed.
   - **Head Count**: Enter the Head Count. The number entered here overrides the actual attendance count (unless 0 is entered).
   - **NOTES**: Enter any information notes concerning this occurrence.

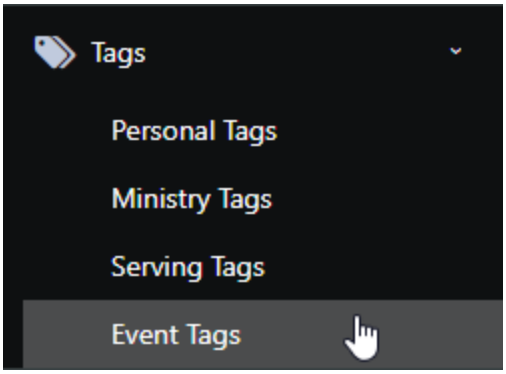


8. Continue these steps to add more occurrences as appropriate for your event.

Specify the Event Calendar Details

Even though you can enter your Event Calendar Details before setting up an occurrence, it is best to add the occurrences first since the calendar details cannot be published until there is at least one occurrence established. Follow the steps below to enter the Public Calendar Details.

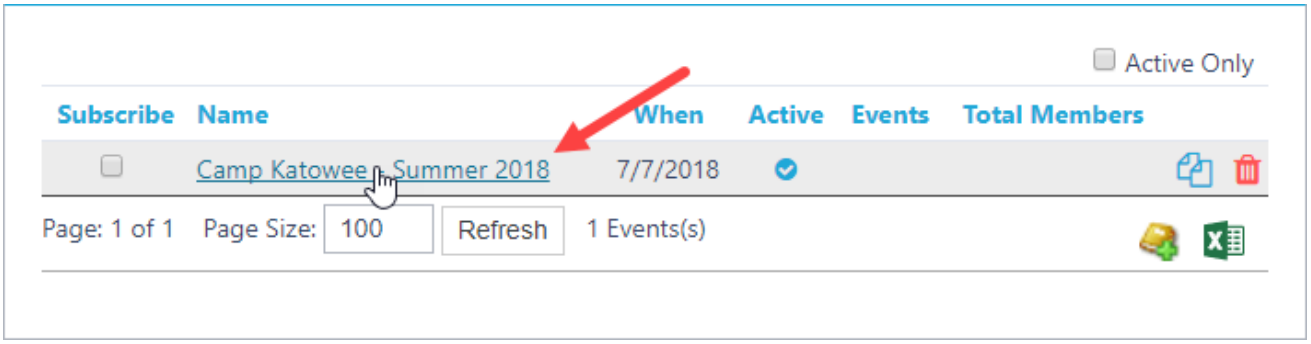
1. From the **Tags** menu, click the **Event Tags** option.



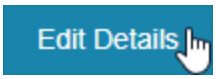
2. Click on the **Event** link for the event that you would like to add the Event Calendar Details

(e.g. Camp Katowee - Summer 2018).

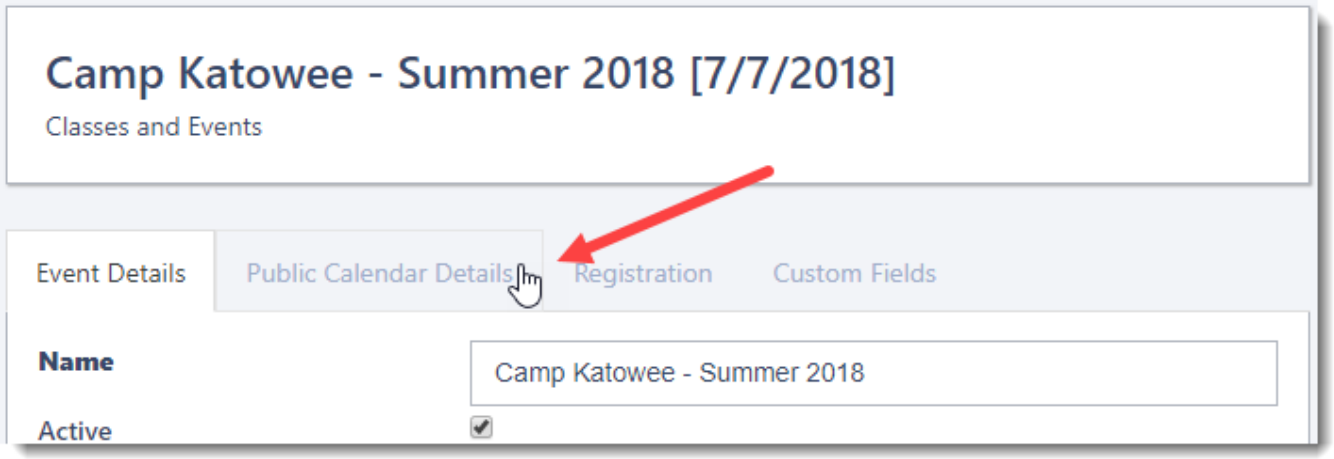
NOTE: See the Subscribe to a Tag section for details on how to use the **Subscribe** check box.



3. Click the **Edit Details** button.



4. Select the **Public Calendar Details** tab.



5. Enter the Public Calendar Details as appropriate for your event.
   - **Contact Name**: Enter the contact person to display on your **Member Responsive Portal** > **Event Details** page.
   - **Contact Phone**: Enter the phone number for the contact person.
   - **Contact Email**: Enter the email for the contact person.
   - **External Link**: If you have a separate website for this event, enter the website address in this field. The "Find Out More" button on the Members Responsive portal links to the web address entered here. If the External Link field is left blank, then the "Find Out More" button links to the Event Details page on the Members Responsive portal.

- **Visibility**: Select "Public" to make the event available on your Member Responsive Portal.
- **Primary Ministry**: Select a primary ministry to display the event. This determines the page on your Members Responsive portal where this event displays.
- **Alternate Ministries**: Select any other ministries that relate to this event.
- **Approved**: The Public Calendar Details must be approved before it will display on the Members Responsive Portal. Click the check box to approve the Public Calendar Details. (This check box is inactive if the user does not have rights to approve the public calendar details.)
- **Priority**: Prioritizes this event for the calendar so that the public calendar administrator can know how to schedule this event along with other events may have need for the public calendar. "0" being the lowest priority and "99" being the highest priority.
- **Tier Level**: Select the tier level from the drop-down list.

Event Details | **Public Calendar Details** | Registration | Custom Fields

Contact Name	Mark Miller
Contact Phone	(901) 555-2380
Contact Email	MarkMiller@Example.com
External Link	www.CampKatowee.com
Visibility	Public
Primary Ministry	All Church

Alternate Ministries

- [ ] Adult
- [ ] All Church
- [ ] Baptisms
- [ ] Bookstore
- [ ] Cafe
- [ ] Coffee Bar
- [ ] College
- [ ] Communications / IT
- [ ] Elementary
- [ ] Events Page
- [ ] Finance and Administration
- [ ] Fitness
- [x] High School
- [x] Jr. High
- [ ] Media
- [ ] For Members
- [ ] Memorial Service
- [ ] For Visitors
- [ ] Men's
- [ ] Missions
- [ ] Nursery
- [ ] Office of the Senior Pastor
- [ ] Operations
- [ ] Personal Ministry
- [ ] Prayer
- [ ] Preschool
- [ ] Programming
- [ ] Senior Adults
- [ ] Single's
- [ ] Small Groups
- [ ] Sports
- [ ] Sunday Seminars
- [ ] Weddings
- [ ] Women's
- [x] Youth Sports
- [ ] Volunteering
- [ ] Pre-Marital
- [ ] Homeschool

Approved	[ ]
Priority	85
	(0 - 99)
Tier Level	Tier I

Update | Cancel

Members Responsive Portal

Also referred to as the Arena-managed website, the **Members Responsive Portal** is where your members go to view events that you publish to the Calendar and where individuals go to register for events. Also, the Members Responsive Portal is used for online giving and a place where group leaders can manage small groups.

To navigate to this site, add the following to the end of your Arena URL:

Portal=4&RefreshCache=True

For example, if your Arena URL is "https://Arena.FirstChurch.com/default.aspx", then change it to the following to access your Members Responsive Portal:

https://Arena.FirstChurch.com/default.aspx?Portal=4&RefreshCache=True

The default Portal designations are as follows:

1 - Arena CHMs website
2 - Web Page (old Web Portal)
3 - Mobile
4 - Members Responsive Portal

The Portal designations can be modified by navigating to **Administration** > **Portal List**.

Since only one portal can be open per browser, it is recommended that you run a different browser if you want to view both the Arena CHMs website and the Members Responsive Portal at the same time.

For example, you may have a Chrome browser running the Arena CHMs website while a Firefox or IE browser running the Members Responsive Portal. Running this way can be helpful if you are in the process of making changes to an Event and then want to immediately view the changes on the portal.

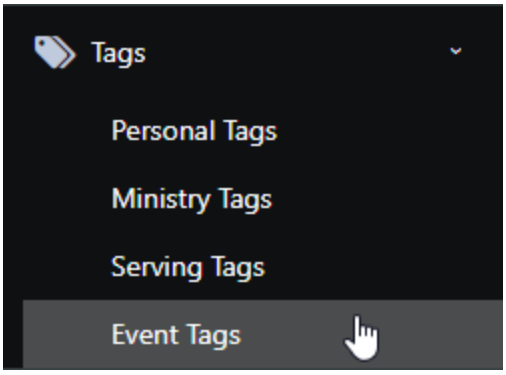
Set up the Registration Information

The following section describes how to set up the Registration Information for an event tag. This first involves security and then walks you through each of the sections on the Registration tab for an Event tag.

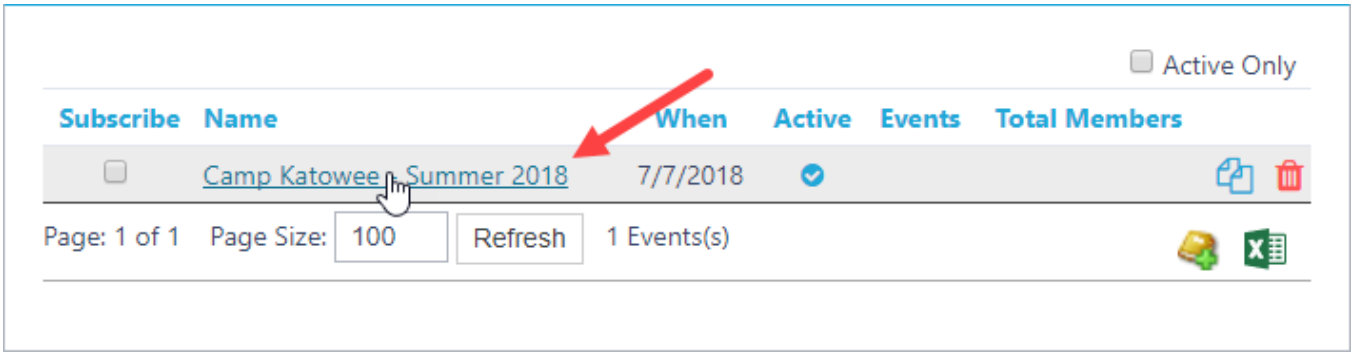
Edit Registration Security

The first part of setting up your registration information for an event involves having the rights to edit the registration information on an Event tag. Follow the steps below to setup security to edit registrations.

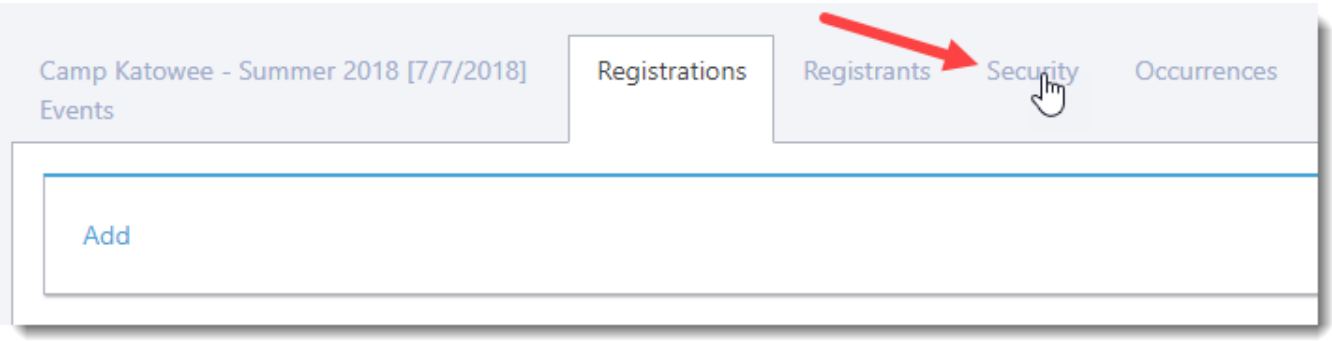
1. From the **Tags** menu, click the **Event Tags** option.



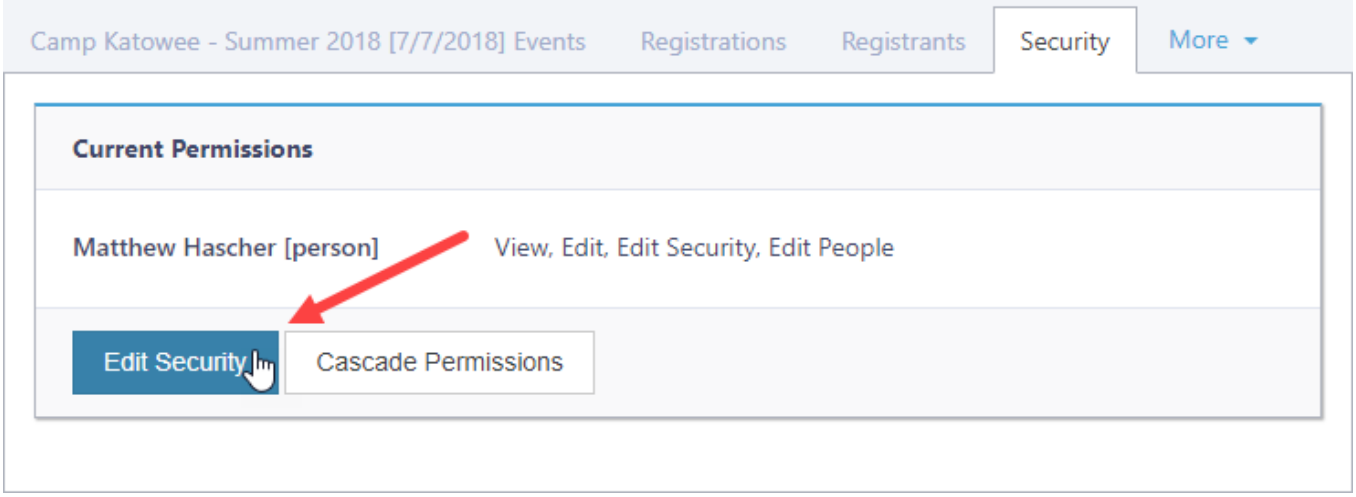
2. Click on the **Event** link for the event that you would like to add security (e.g. Camp Katowee - Summer 2018).



3. Select the **Security** tab.

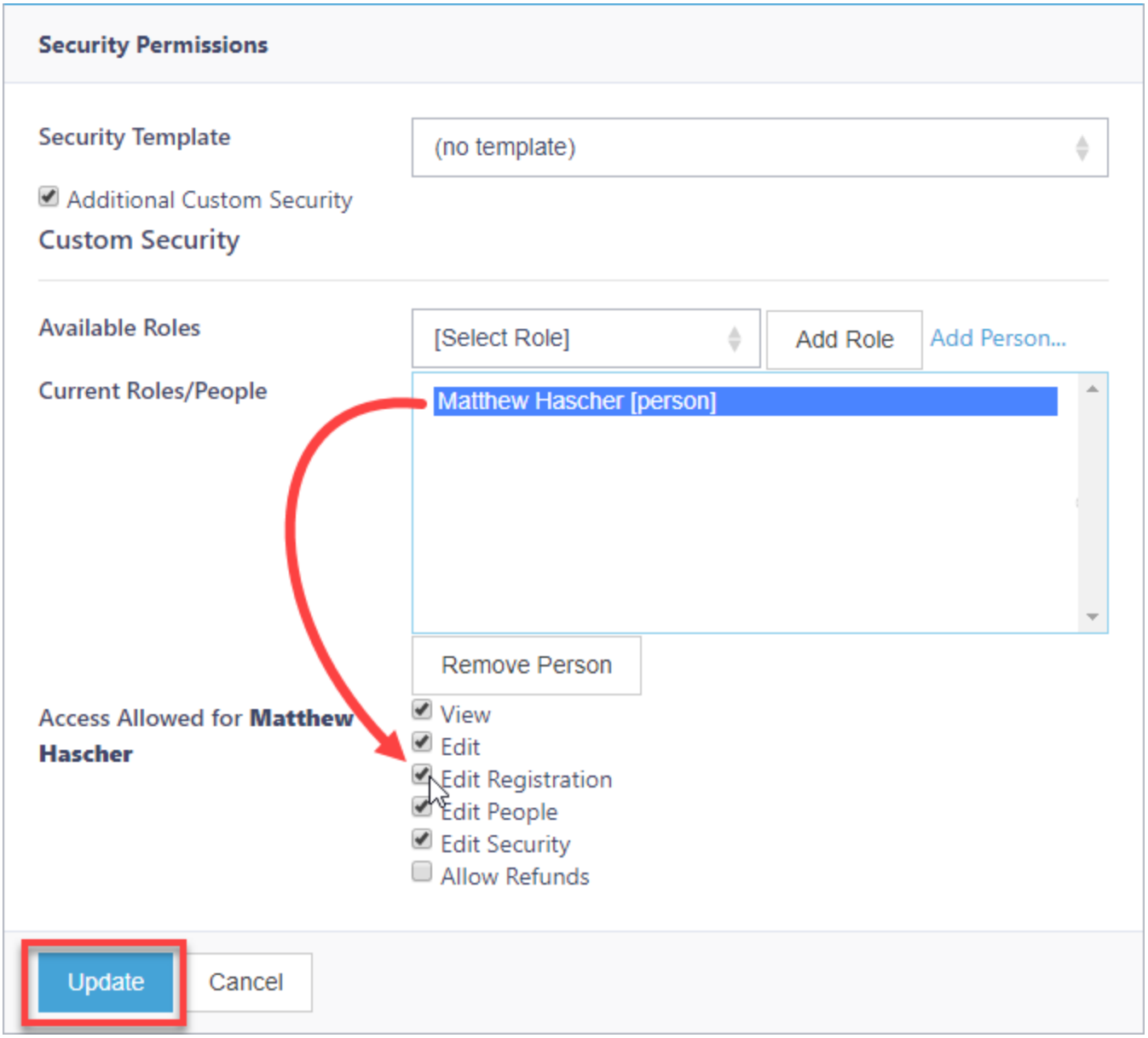


4. Click the **Edit Security** button.



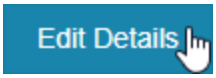
5. From the Security Permissions area, select your login and then check the **Edit Registration** check box. Select any other Roles or People and give rights as appropriate by checking the corresponding Access Allowed check boxes.

6. Click the **Update** button when you are finished.

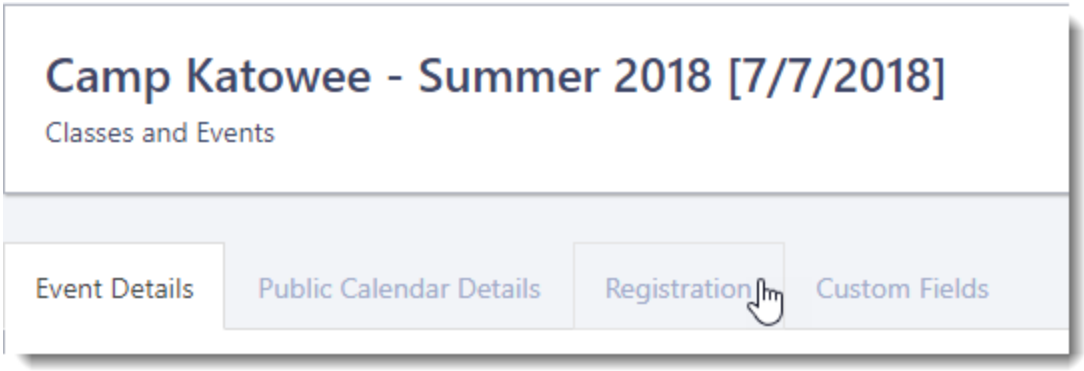


Setup the Registration Information

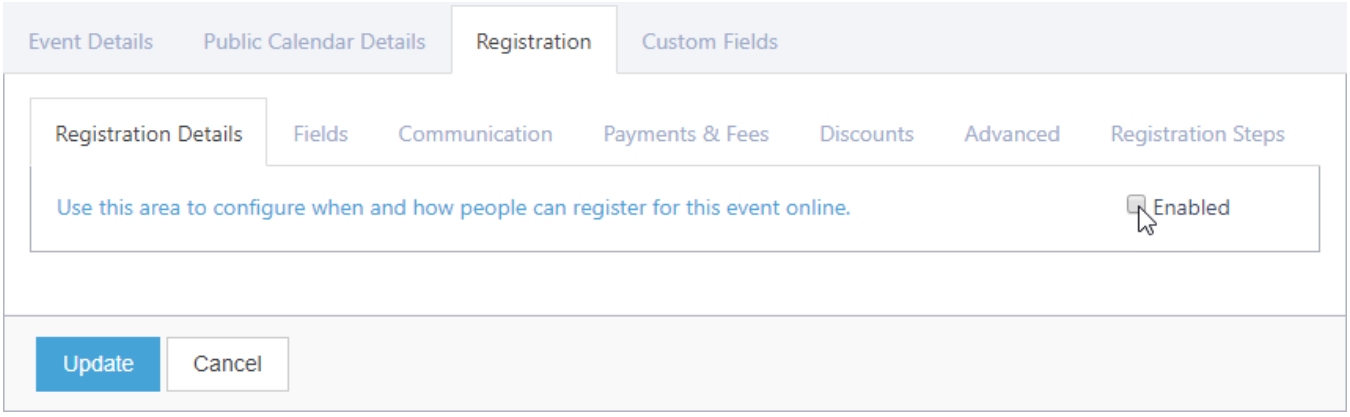
1. Click the **Edit Details** button for the event.



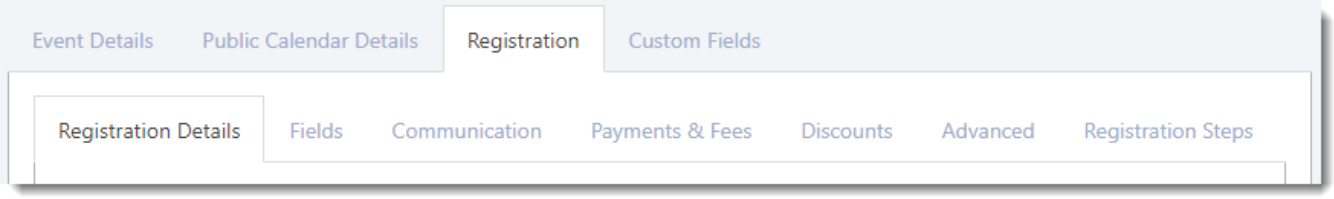
2. Select the **Registrations** tab.



3. Click the **Enabled** check box. (See the Edit Registration Security section if this check box is not active.)



4. After the Enabled check box is selected, there are **7 tabs** that appear under the Registration tab: Registration Details, Fields, Communication, Payment & Fees, Discounts, Advanced, and Registration Steps.



Registration Details tab

Use the Registration Details tab to configure how and when individuals can register for this event online.

- **Registration Start Date**: Enter the date and time that the online registration starts.
- **Registration End Date**: Enter the date and time that the online registration ends.
- **Limit Registrations to _____ individuals**: Enter the maximum number of individuals that can register for this event. (This field limits the cumulative number for registrations and

registrants that can register online.)

- **Limit Registrants to ages between _____ and _____ as of [Registration Date]**: Enter the age range that individuals can register as of the registration date specified.
- **Limit Registrants to grades between _____ and _____**: Enter the grade range that individuals can register.
- **Limit Registrants to gender [Male or Female]**: If the registration is gender specific, choose **Male** or **Female**.
- **Note:** Selecting the limitations will cause that field to be required during registration.
- **Allow Multiple Registrants per Registration** - **Max #**: A Registration is considered to be the individual who registers online. By selecting this check box, you allow a Registration to register additional individuals (registrants). The number of registrants per registration can be limited by entering a number in the "Max #" field.
- **Allow Anonymous Registration**: Select this option to allow individuals without a member login to register online for an event. After registering for an event, the individual anonymous registration is added to the database as a record.
- **Description**: Enter a description to appear on the first page of the online registration process.
- **Instructions**: Enter any instructions that you want a registration to follow. This information also appears with the description on the first page of the online registration process.

Event Details | Public Calendar Details | Registration | Custom Fields

Registration Details | Fields | Communication | Payments & Fees | Discounts | Advanced | Registration Steps

Use this area to configure when and how people can register for this event online.

☑ Enabled

Registration Start Date 6/9/2018 1:00 AM

Registration End Date 6/14/2018 1:00 AM

☑ Limit Registrations to 270 individuals

☐ Limit Registrants to ages between 0 and as of Registration Date

☑ Limit Registrants to grades between 10th and 12th

☐ Limit Registrants to gender Male

☑ Allow Multiple Registrants per Registration Max # 20

☑ Allow Anonymous Registration (users would not be required to login or create an account before registering people for the event).

Description

This Description will appear on the first page that users see when they start to register for this event.

Welcome to Camp Katowee - Summer 2018.

Design | HTML | Preview

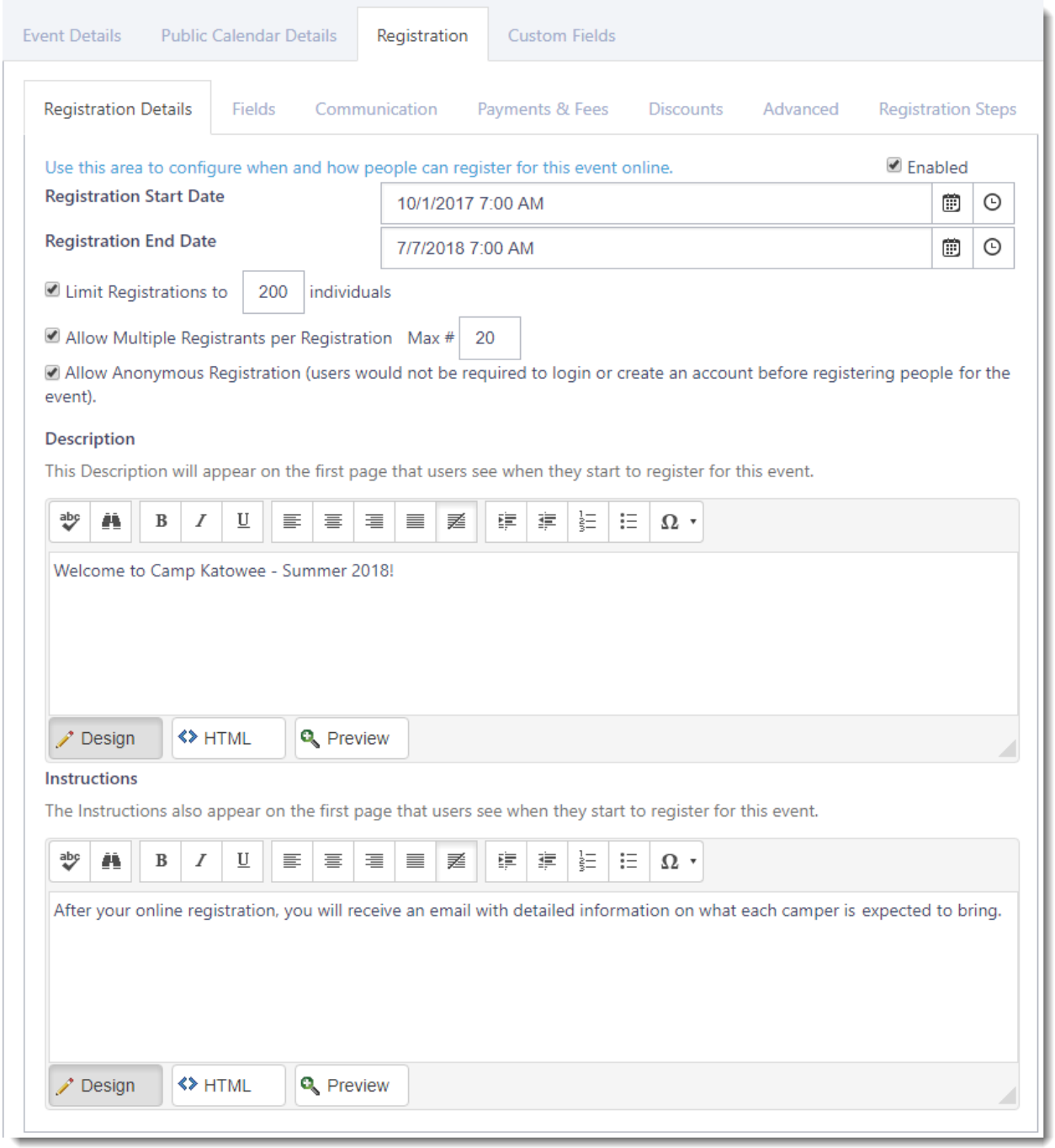
Instructions

The Instructions also appear on the first page that users see when they start to register for this event.

After your online registration, you will receive an email with detailed information on what each camper is expected to bring.

Design | HTML | Preview

Update | Cancel



Fields tab

The Fields tab allows you to specify which fields appear for the online registration page. There are standard fields and custom fields.

Standard Field Settings

This section allows you to customize the standard fields that appear on the online registration page.

- **Use**: Select the "Use" option if you would like a field to be available to the user during online

registration.

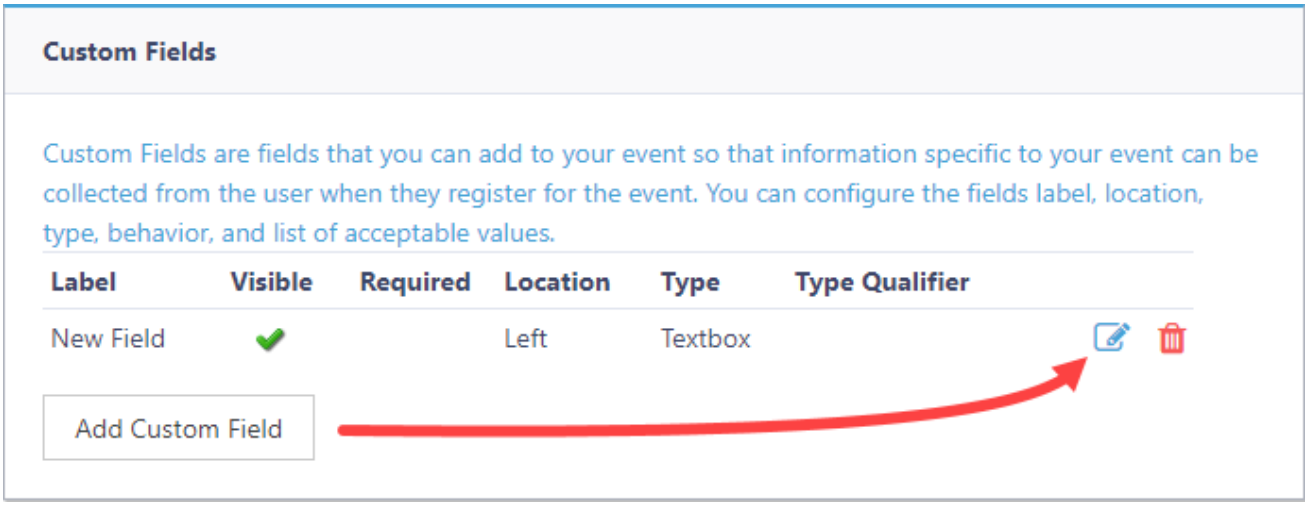
- **Required**: Selecting this option forces the registrant to fill out this field before the online registration can be submitted.
- **Auto Fill**: This option only applies if you have selected both the "Allow Multiple Registrations per Registration" and "Allow Anonymous Registration" on the Registration Details tab. Select this option to automatically fill the information from one registrant to another when clicking the Next button during the online registration process.
- **Show on Summary**: Check boxes for fields you want to display on the Registration Summary page.
- **Order**: Change the numbers in the "Order" column to change the display order on the each field in use. The Standard Fields are listed in order by the number assigned from smallest to greatest. For example, if you want to the Email field to be displayed as the 5th field, enter the number "5" in the Order box next to the Email field. (After clicking the Update button, the fields will rearrange according to the order number assigned.)

Standard Field Settings

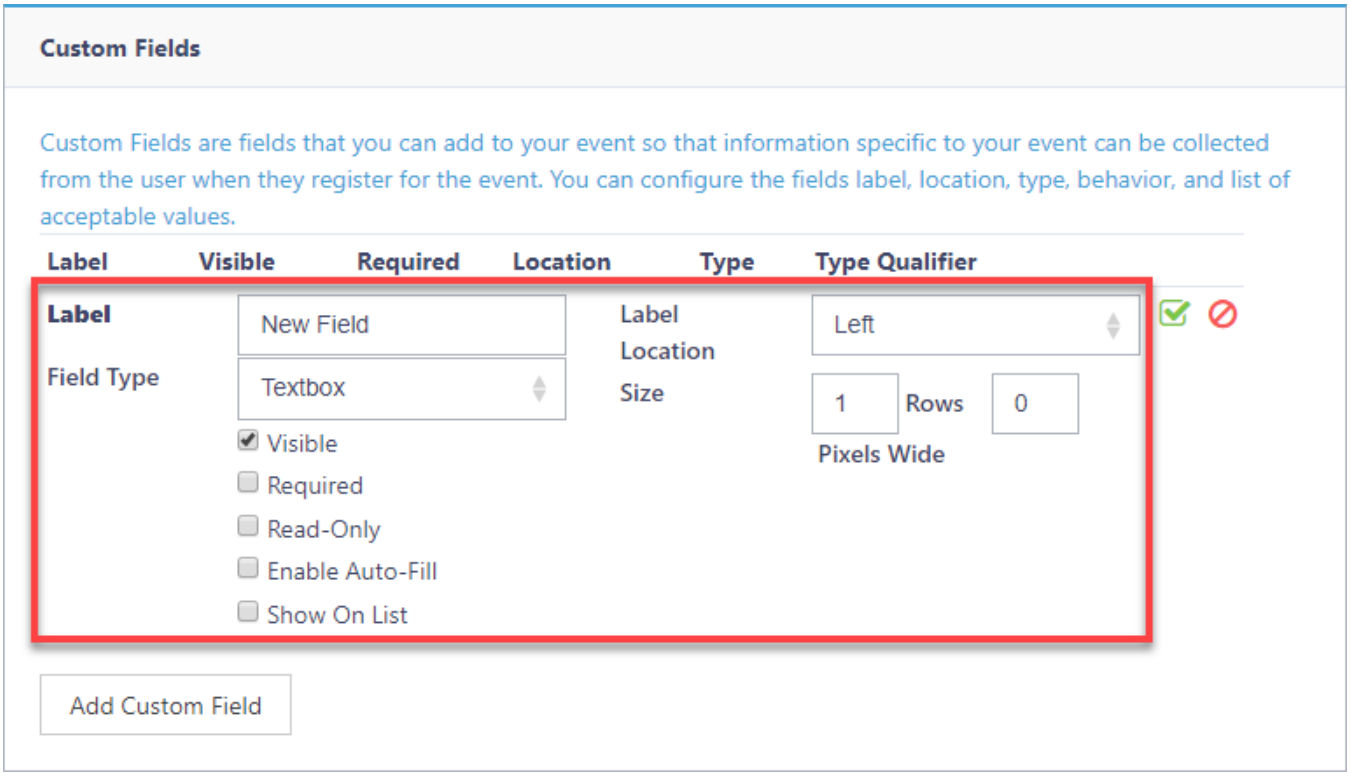
	Use	Required	Auto Fill	Show On Summary	Order
First Name	☑	☑	☐	☐	1
Nick Name	☐	☐	☐	☐	2
Middle Name	☐	☐	☐	☐	3
Last Name	☑	☑	☑	☐	4
Address	☑	☑	☑	☐	5
Home Phone	☑	☑	☑	☐	6
Work Phone	☑	☐	☐	☐	7
Cell Phone	☑	☐	☐	☐	8
Fax	☐	☐	☐	☐	9
Email	☑	☑	☐	☐	10
Gender	☐	☐	☐	☐	11
Birth Date	☐	☐	☐	☐	12
Marital Status	☐	☐	☐	☐	13
Anniversary Date	☐	☐	☐	☐	14
Social Security #	☐	☐	☐	☐	15

Cutom Fields

1. Click the **Add Custom Field** button to add a Custom Field, and then click the **Edit** icon to specify the specifics for the custom field.



2. After clicking the **Edit** icon, the customization options appear.



3. Enter a name for the custom field in the **Label** field by overwriting the words "New Field".

4. Select the **Field Type** from the drop-down list. (The default is set to "Textbox".) The various types of Field Types are listed below.

- **Address**: This field enables the ability for registrants to enter an address (Address, City, State, and Zip fields).

- **Area**: Places a list of existing areas on the form in a drop-down list format. This field enables the ability to specify a page to display the group area. See Groups Areas for more information.

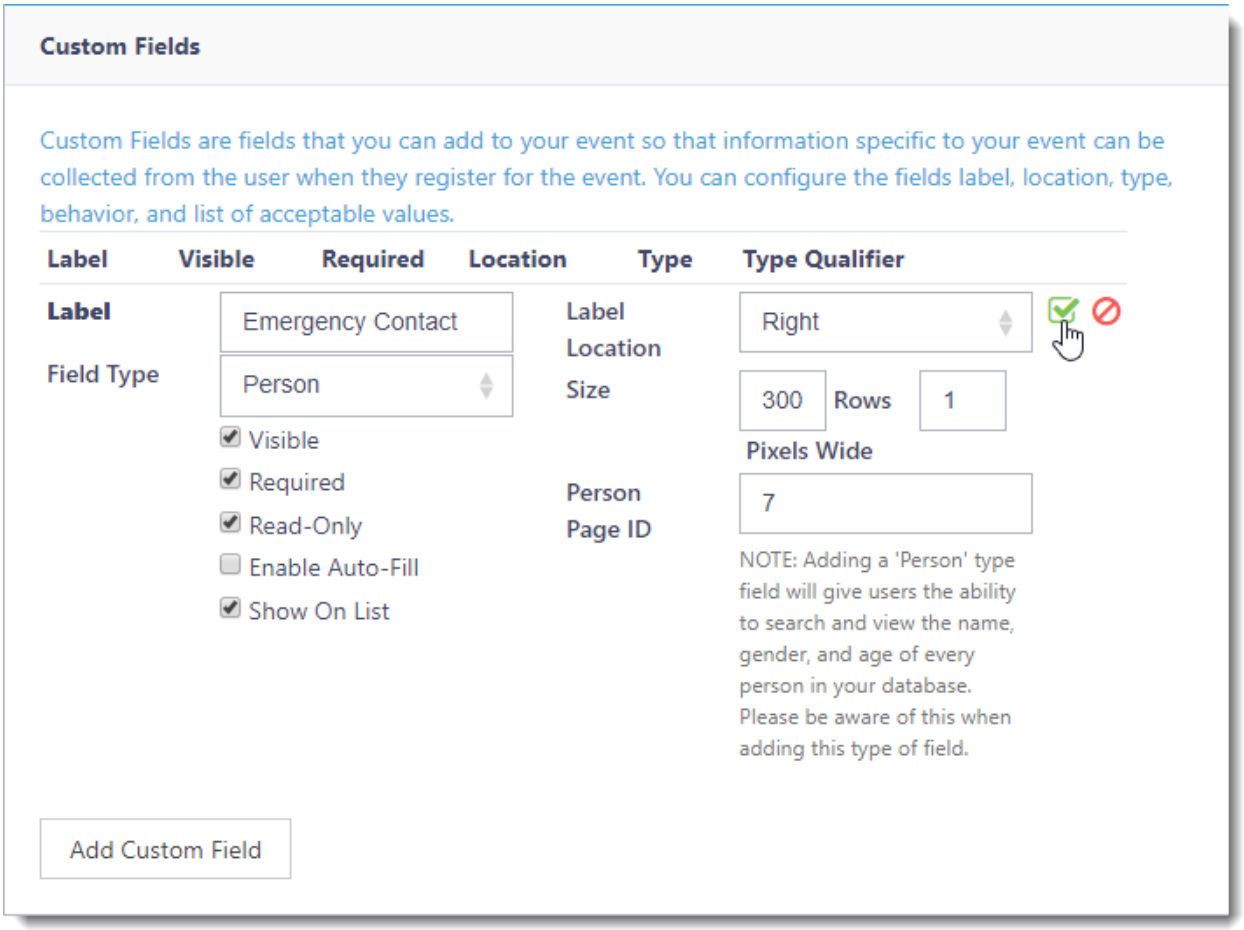
- **Check Box**: This field enables the ability to create a multi-select list of options for registrants. Enter the options in comma-delimited format in the Values field.
- **Custom Query**: This field enables you to enter a custom query, in the Query field.
- **Date**: Places a date field with a **Calendar** icon.
- **Document**: This field enables registrants the ability to attach a document. First select a Document Type to associate with uploaded registrant documents. Document Type is a customizable Lookup. See your Arena Administrator if no Document Types are available.
- **Drop-down List**: This field enables you the ability to create a drop-down list of options for registrations to select. Enter values in comma delimited format (e.g. Option A, Option B, Option C).
- **Image**: This field enables registrants the ability to upload an image.
- **Lookup Type**: This field enables the ability to select an existing drop-down from Lookups.
- **Person**: This field enables the ability for registrants to search for a single existing record, using default Person Page ID (7).
- **Person Attribute**: This field links to person attribute on the person detail page.
- **Phone Number**: This field enables registrants the ability to enter a 10-digit telephone number with the option to enter an extension.
- **Radio List**: Places a radio button for each value added in the Value field. Users can select only one option.
- **Rich Text Field**: Allows users to enter rich text.
- **Static HTML Content**: This field enables the ability to enter static text or static HTML formatted text in the HTML field.
- **Text box**: Places a text box on the form. The text box allows 255 characters.

5. Select the label location from the **Label** drop-down list. Options are left, right, top, or bottom.

6. Select the **Size** from the Rows and Pixels Wide fields.
   - **Rows**: Use this option to adjust the number of rows to use for the custom field (e.g., a rich text field or static HTML content.)
   - **Pixels Wide**: Use this option to specify the width of the custom field.

7. Depending on the Field Type, you may be required to enter a value for the choices presented. Field Types that require this are check box, radio, drop-down, and static.
   - **Visible**: Select this check box to make the field visible (both internally and externally).

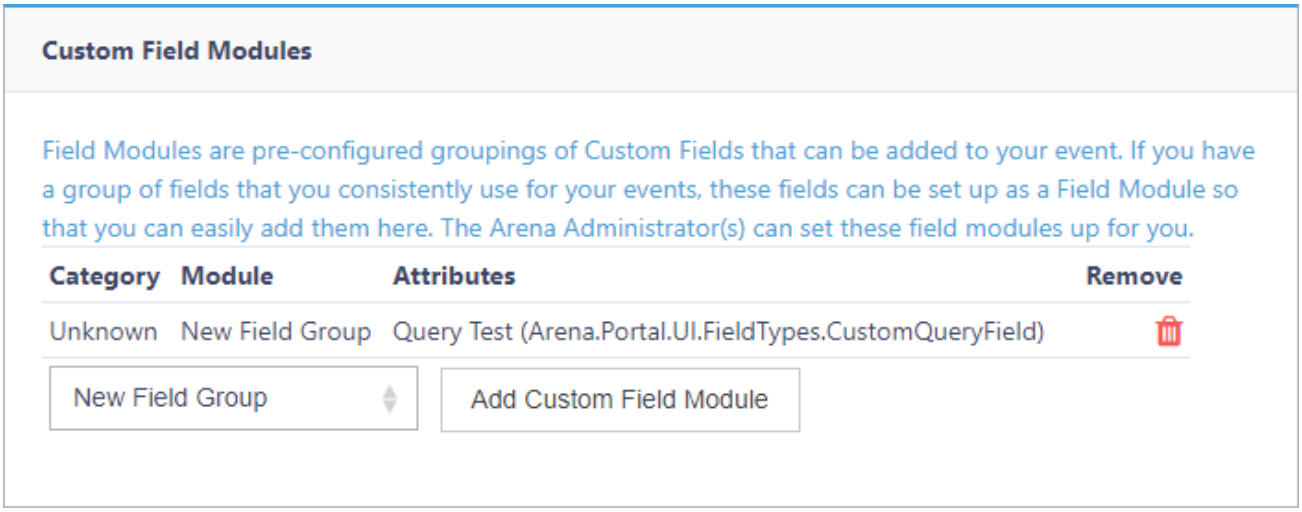
- **Required**: Select this check box for fields that are required to select or complete.
- **Read Only**: Select this check box to make fields view only. The field displays as a disabled field (grayed out).
- **Enable Auto-Fill**: For Events behind a member login, check this box for required custom fields.
- **Show on List**: Select this check box for fields to display on the **Tag Member** page.



8. After making the appropriate changes for the custom field, click the **Save** icon to save your changes or the **Cancel** icon to close the customization options.

Custom Field Modules

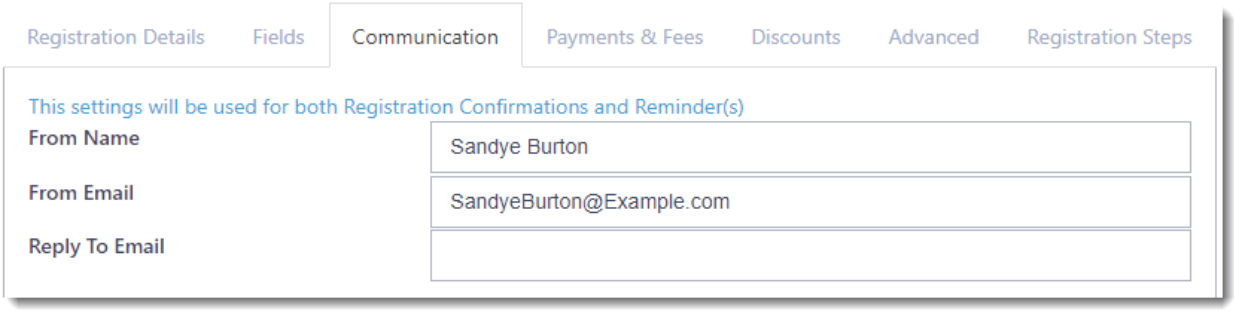
If available, select a Custom Field Group. If not available, see your Arena Administrator. To remove a Custom Field or Custom Field Module, click the **Delete** icon next to the field/module you want to remove. (A custom field cannot be deleted if it is in use.)



Communication tab

The Communications tab allows you to set up communication between your attenders and the staff involved in hosting the event. The communication emails require that your Arena administrator has certain agents enabled.

- **From Name**: Enter the name of the person who is sending the registration confirmation and reminder emails.
- **From Email**: When a registration confirmation or a reminder email is sent, the email address entered here is displayed in the "From" field on the email.
- **Reply To Email**: (optional) When the registrant receives an email and selects to reply, the email address entered here will be used. If no "Reply To Email" address is specified, then the "From Email" address is used for replies.

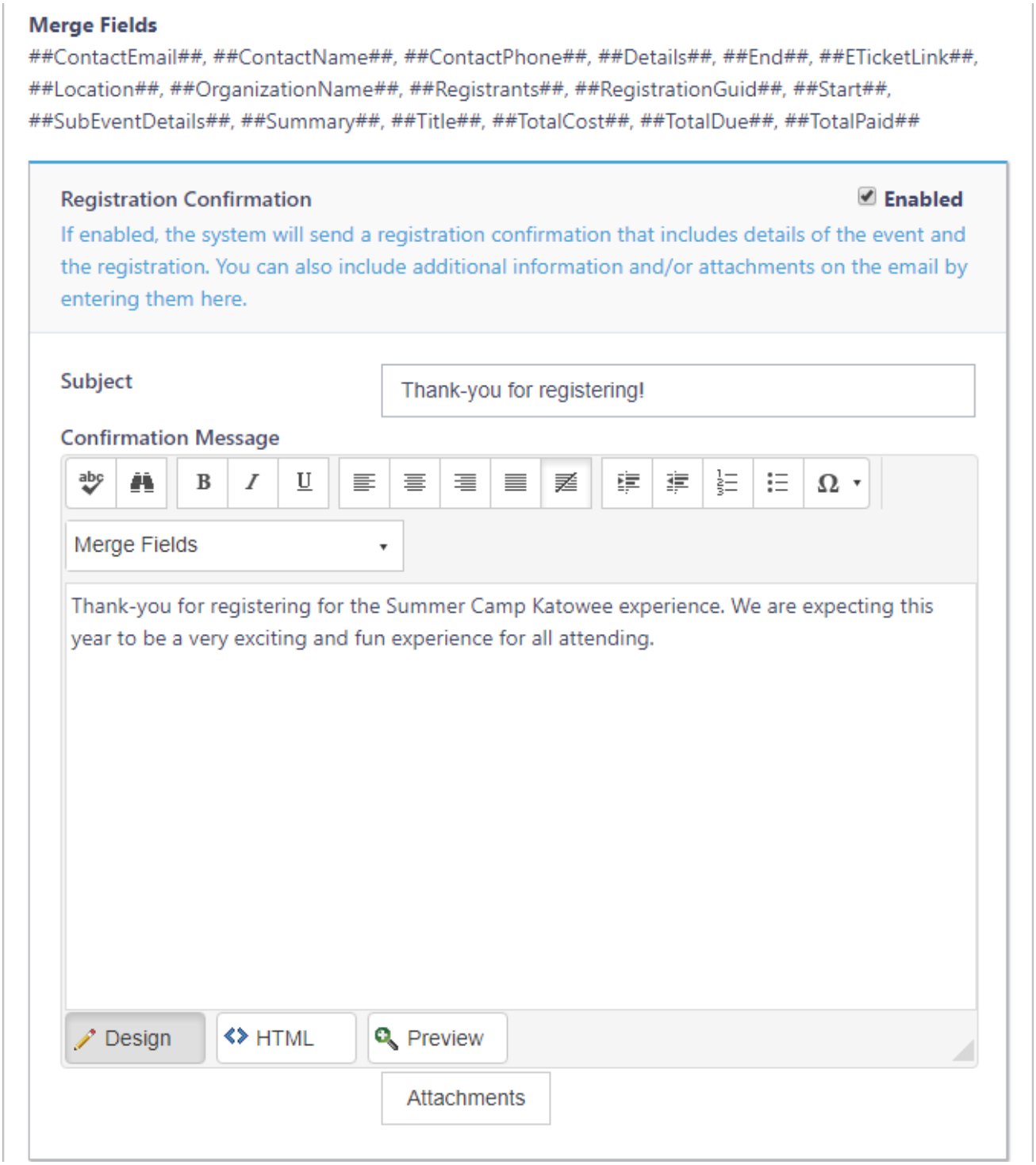


NOTE: If you enter any of the above fields, but do not check the **Registration Confirmation - Enabled** check box, then the above fields will not be saved when clicking the **Update** button.

Registration Confirmation

Select the **Enabled** check box to display the registration confirmation email. The email option has

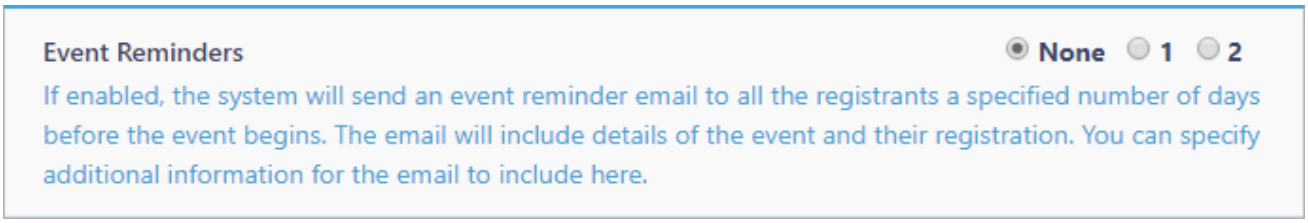
full HTML functionality. Merge fields that can be used in the email are listed above the Registration Confirmation section.



Besides sending a registration confirmation, there are also options to send event reminders, E-tickets, and a notification to the owner of the event. These options are listed below with a description of each option.

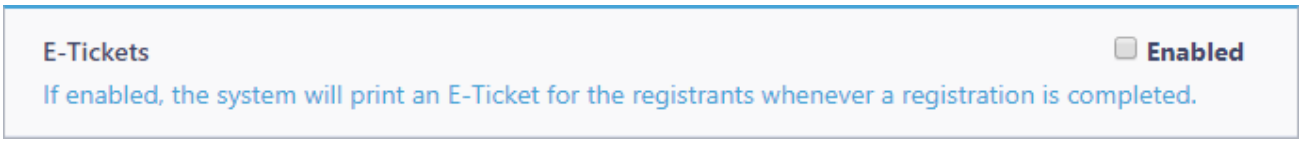
Event Reminders

Select either None, 1, or 2 Event Reminders. The Event Reminder is sent a specified number of days before the event. If you select to have 2 Event Reminders, then there are two reminder emails available for you to set up.



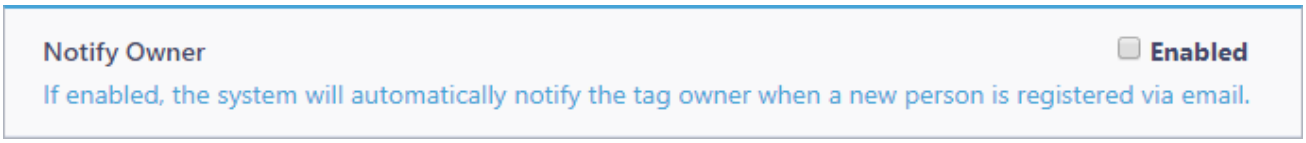
E-Tickets

Check the Enabled check box if you would like the registrant to receive an E-Ticket after registration is completed. This option requires additional setup in order for registered users to print an e-ticket associated with the Event. This option is not available for anonymous registrations.



Notify Owner

If you check the Enabled check box, then the "Owner" specified on the Event Details tab is notified via email after a new registration is completed.



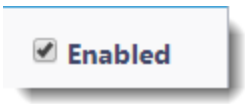
Payments & Fees tab

Enter the Event Costs, Additional Fees, and the Payment Processing information on this tab.

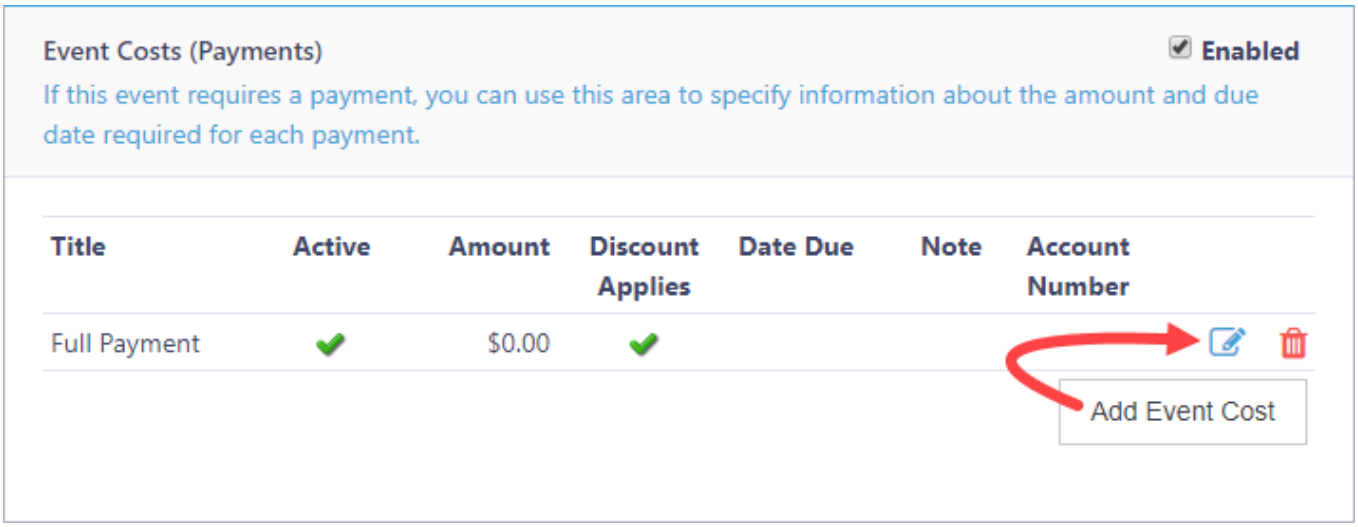
Event Costs (Payments)

Event Costs allow you to specify how much the event costs to attend. These costs can include multiple payments with due dates associated with each payment.

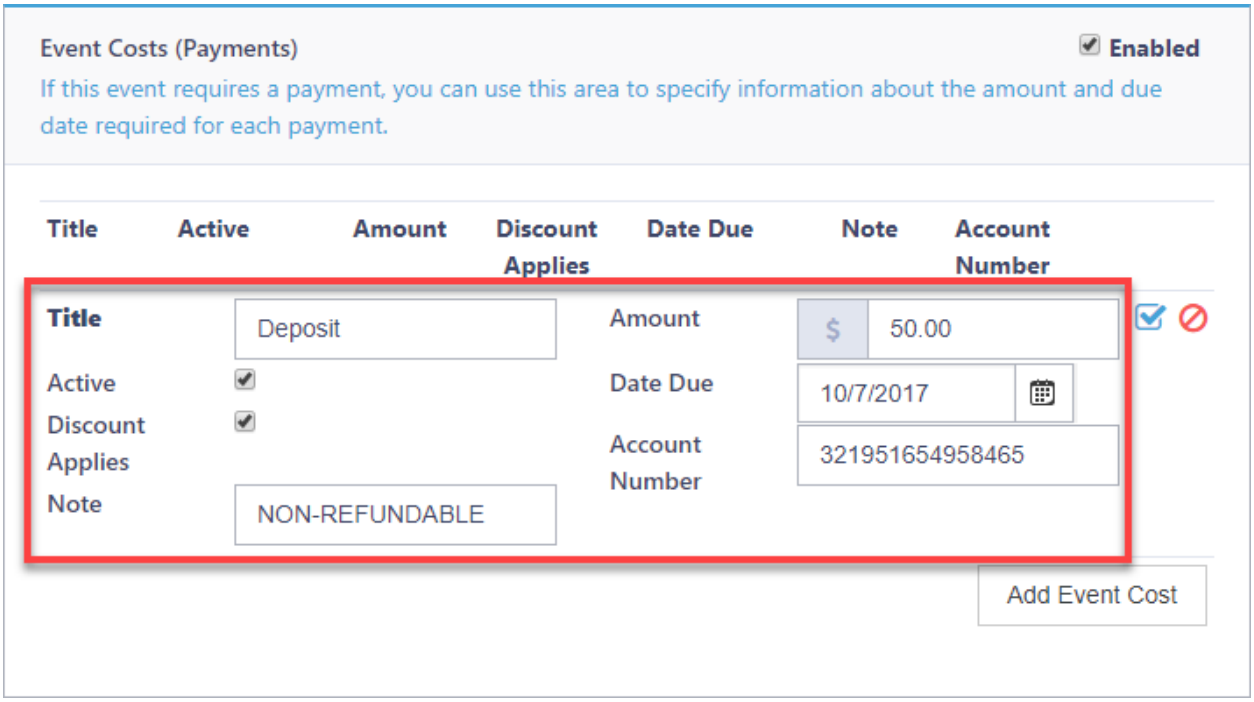
1. Click the **Enabled** check box to activate Event Costs.



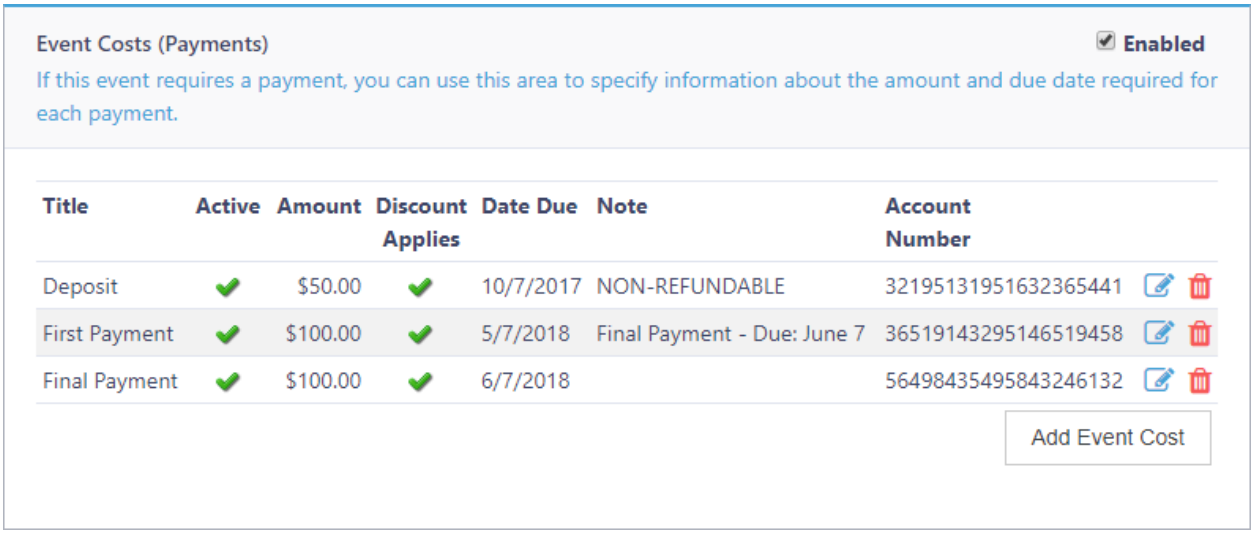
2. Next, click the **Add Event Cost** button to add a new event cost, and then click the **Edit** icon to specify the fields for the Event Cost.



3. Below are the Event Cost fields.
   - **Title**: Enter the title for this payment. This displays on the registration page.
   - **Active**: Mark the payment active in order to make available on the registration page.
   - **Amount**: Enter the amount for the payment option.
   - **Discount Applies**: Check this box if Discounts (from the next tab) apply to the payment option. Discounts run through 11:59:59.
   - **Date Due**: Click the **Calendar** icon to select the due date for the payment.
   - **Note**: Enter a note for this payment option. The Note displays on the Member Responsive Portal during the registration process (e.g. Non-Refundable Deposit).
   - **Account Number**: Enter the account number for this payment option. For informational purposes only (e.g. Income account on your Chart of Accounts).



4. Payments are cumulative. In the example below the total cost is $250.
   - No payment is required until 10/7/2017. (If a deposit is due immediately, then enter the Date Due as today's date.)
   - Registration between 10/7/2017 and 5/7/2018 requires a $50 deposit.
   - Registration after 5/7/2018 requires $150 ($50 payment + $100 First Payment).
   - Registration after 6/7/2018 requires $250 ($50 payment + $100 First Payment + $100 Final Payment).



5. After making the appropriate changes for an event cost, click the **Save** icon to save your changes or the **Cancel** icon to close the customization options. The Event Costs are listed and can be deleted by clicking the **Delete** icon next to the event cost you want to remove.

Below are some considerations for setting payments:

- To allow registration without payment, set the due date for a future date.
- To require payment at time of registration, set the date due to the current or past date.
- If the goal is to allow registrants to enter in a random amount, you might consider creating a $1 Additional Fee with multiples. For example $1 x 10 for a $10 payment.
- To allow registration with no payment, do not enter a date.

While Payments, Additional Fees, and Discounts provide flexibility, below are some considerations as you implement this feature. For example, if the event cost is $15 each but for three registrants the fee is $35, below are three scenarios to handle this, depending on your level of confidence with registrants:

- Wording that states "three or more qualify for a special group rate - please call (this) number to register. This is a higher security option that permits special pricing using unpublished discount codes and/or other tricks.
- Publishing discount codes, which can be used to bring the price down to the proper level depending on the quantity of registrants.
- If you do not need to capture every registrants information, permit only a single registration for $15, then add extra fees for (option 1) at $15 for ONE additional registrant, or (option 2) +$5 for the second additional registrant, (option 3) +$0 for the fourth registrant, etc.
- If you need to capture each registrant’s info, #1 is the only option unless you trust your registrants, in which case #2 can work. If you don't need to capture each registrant's info, then option 3 is easiest as long as the fees are clear enough that your registrants pick the correct extra fees.

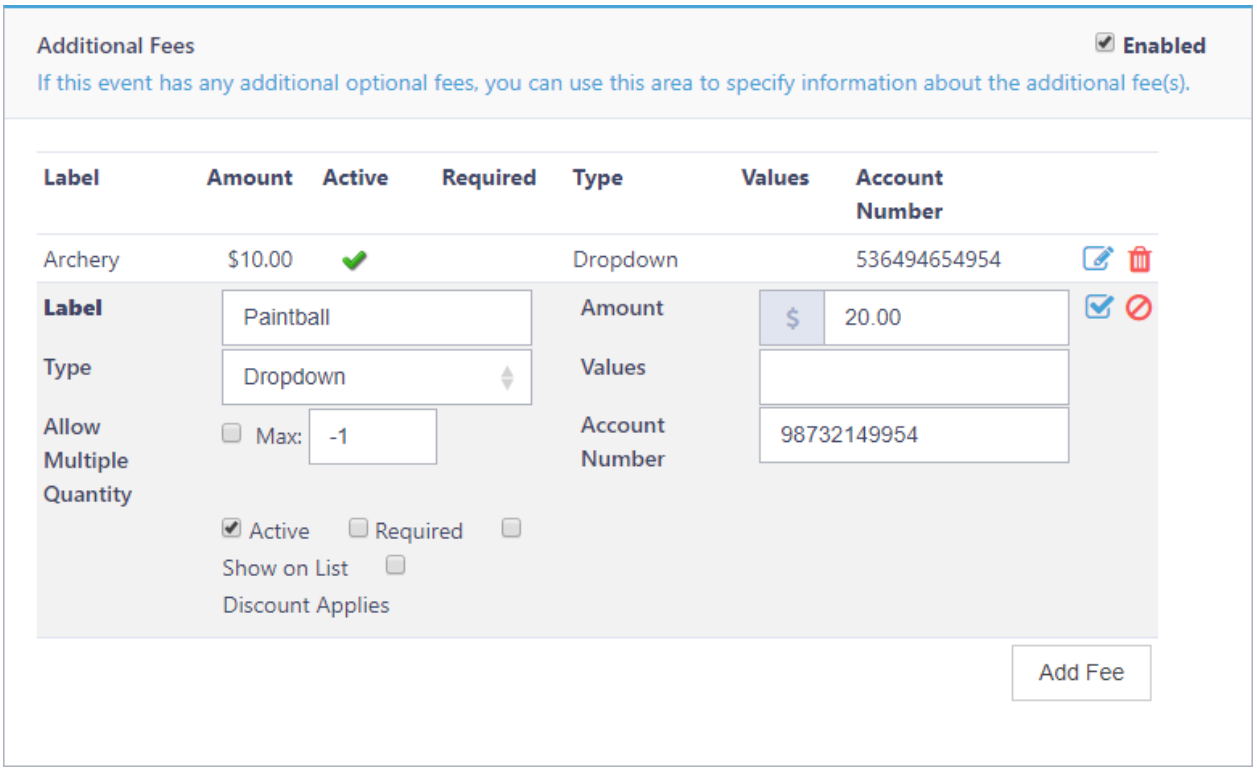
If using sub-events:

- Only one "discount code" text box displays, but each sub-event can have its own discount code.
- You can use the same text for the discount code on sub-events but assign different discount percentages or discount amounts.
- Sub-events do not require payments or fees.

Additional Fees

Enter **Additional Fees**. For events with additional fees, leave those fees active in order for the balance to reflect an accurate balance.

- **Label**: Enter the label for the additional fee.
- **Amount**: Enter the amount for the additional item.
- **Type**: Select the type of field for the additional fee. Options are drop-down and radio list.
- **Values**: Enter the options for the fee in comma-delimited format.
- **Account Number**: Enter the account number for the additional fee.
- **Allow Multiple Quantity**: Select this check box to allow registrants to select multiple quantities. You also need to set a Max number.
- **Active**: Select this check box to make active.
- **Required**: Select this check box for fields that are required to select or complete.
- **Show on List**: Select this check box for fields to display on the **Tag-Member** page.
- **Discount Applies**: Select this check box to enable discounts for the additional fee. Discounts run through 11:59:59.



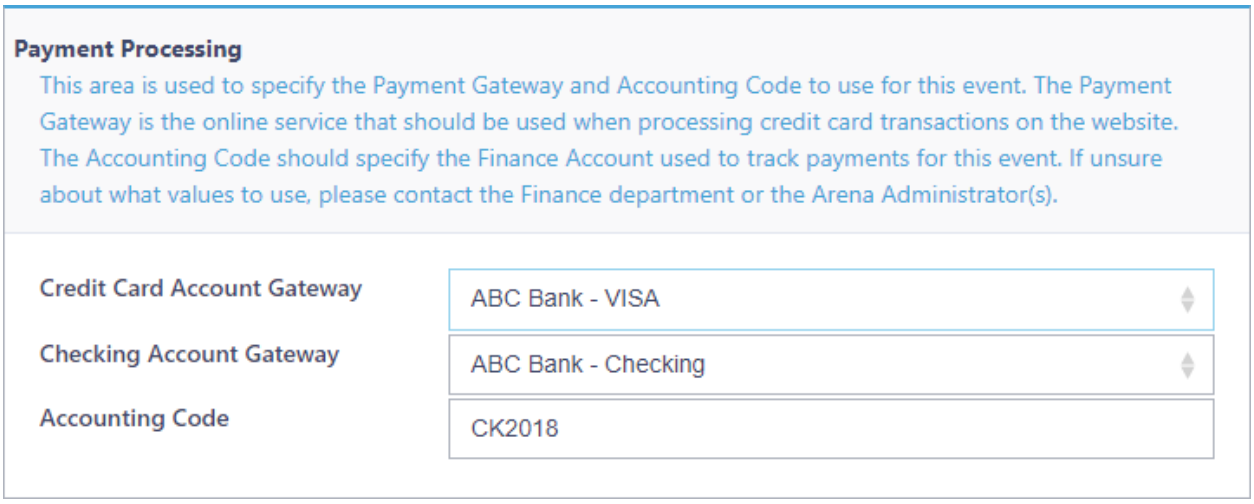
Payment Processing

At least one payment Gateway must be specified if either the Event Costs or Additional Fees has been enabled.

- **Credit Card Account Gateway**: Select the payment gateway from the drop-down list to enable your registrations to pay using a credit card.
- **Checking Account Gateway**: Select the payment gateway from the drop-down list to

enable your registrations to pay using a checking account.

- **Accounting Code:** This is a required informational only field.

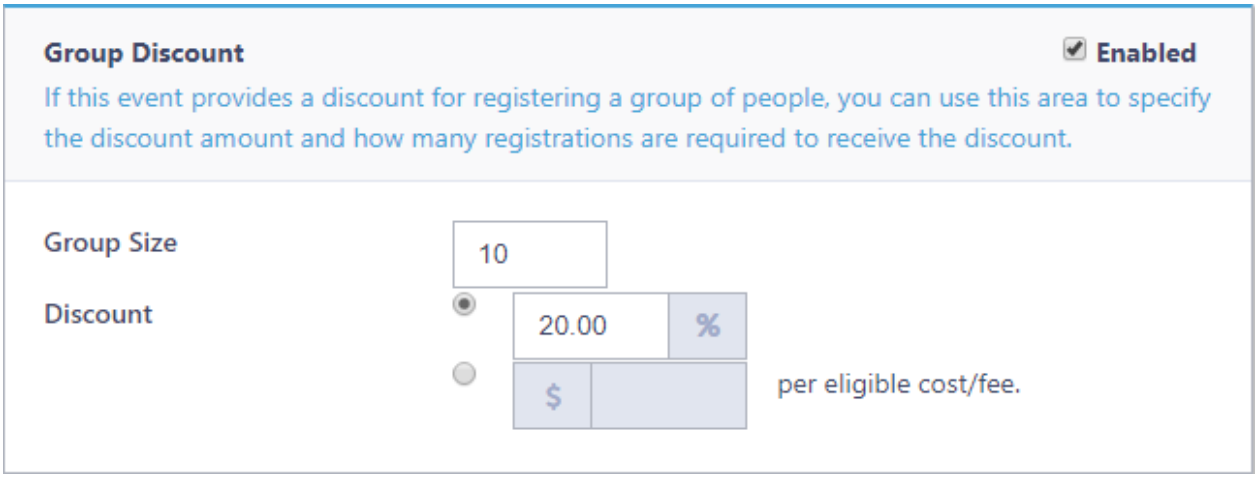


NOTE: Payment Gateways can be set up under the Administration menu by choosing the "Payment Gateways" option.

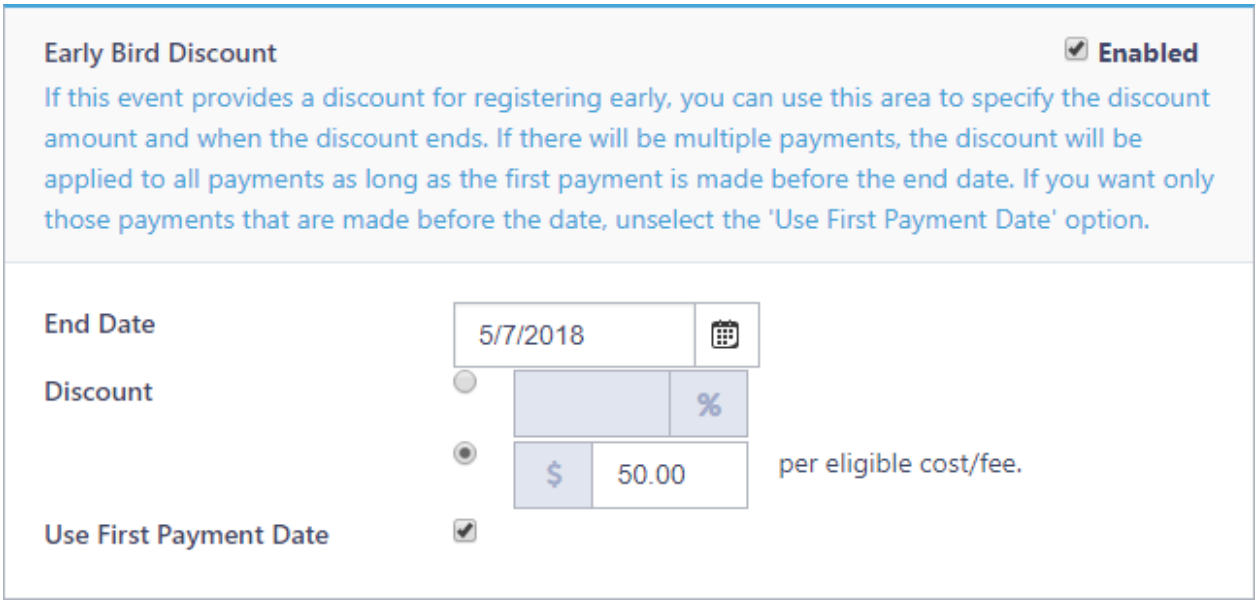
Discounts tab

The Discounts tab has options for Group discounts, Early Bird discounts, and special Discount codes. You can enter percentages, including 100% or dollar value discounts. Percentage discounts apply before dollar discounts.

- **Group Discount**: Enter a group size and a % or dollar discount. Discount applies to all registrants in the registration.



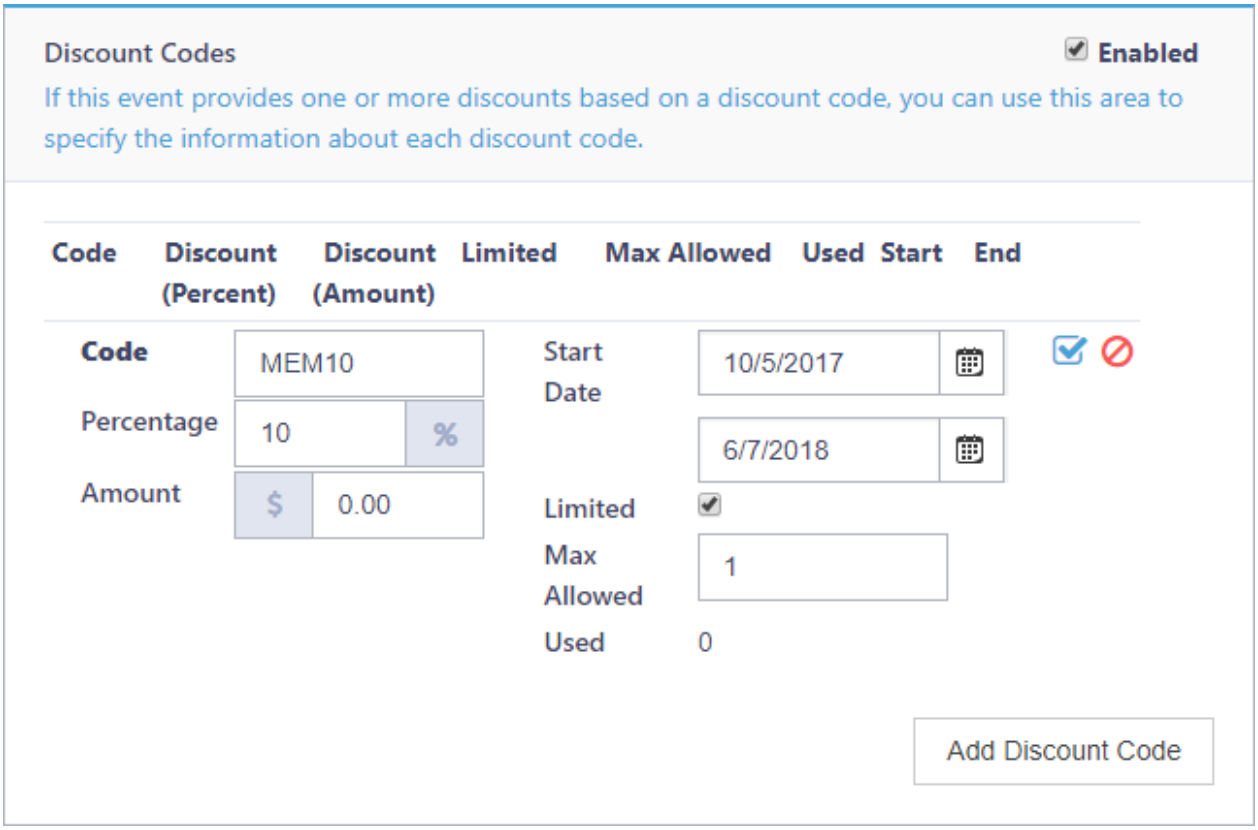
- **Early Bird Discount**: Enter or select the End Date for the early discount and a % or dollar discount. The discount applies to all registrants in the Registration. Discounts run through 11:59:59 of the End Date specified. Discounts do not expire if no end date is set.



- **Discount Codes**: Use this additional discount option for custom discounts like scholarships. **Max Allowed** limits the number of times registrants can use the code, regardless of the number of registrants.

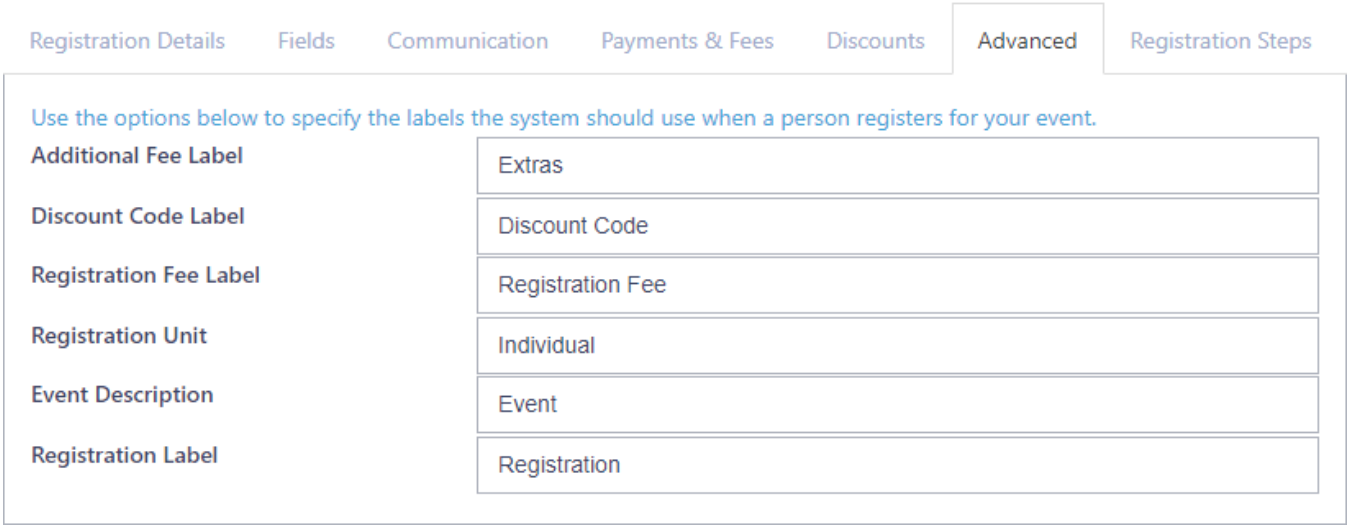
The **Limited** check box tells Arena to limit use of the Discount Code, based on the Max Allowed number. However, it only limits the number of times to use the code on the external site.

NOTE: If the Limited check box is unchecked, you can enter the discount code as many times as you like. Each registrant can use one discount code.



Advanced tab

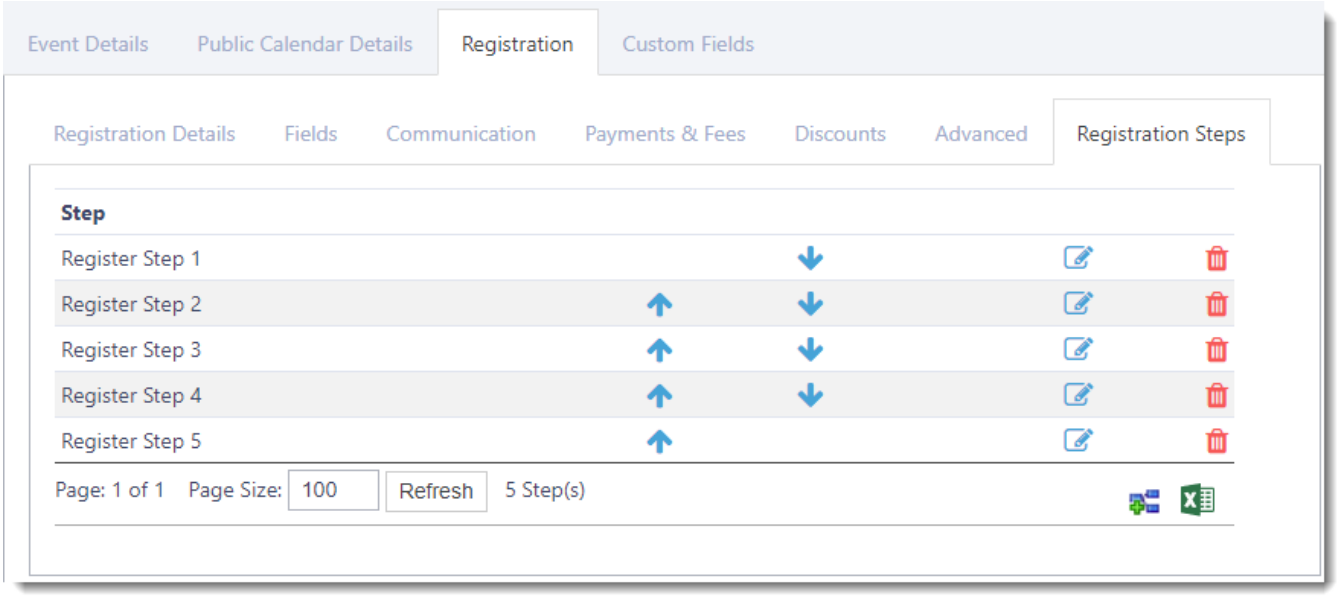
Use the **Advanced** tab to customize the fields used for registration. If you want to omit a field, leave it blank. To change the name of the default field, enter the desired field name.



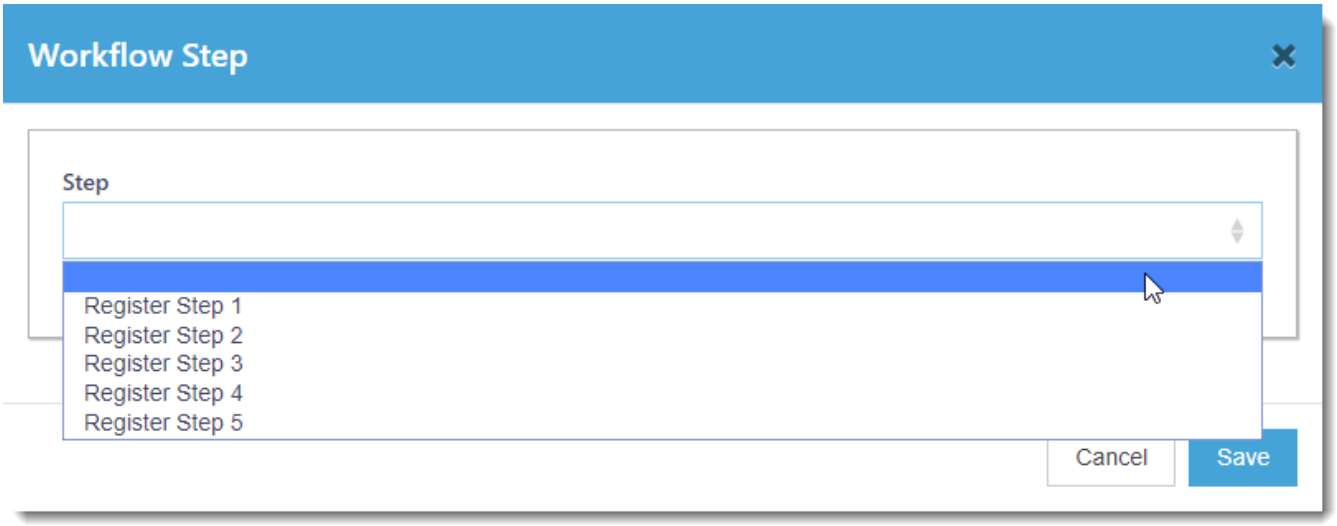
Registration Steps tab

This is a specialized feature and is only used in specific circumstances. If you are not familiar with or have used Registration Steps, then this may not be the feature you want to implement. If desired, you can create and customize Registration Steps. The default registration is a five-step process.

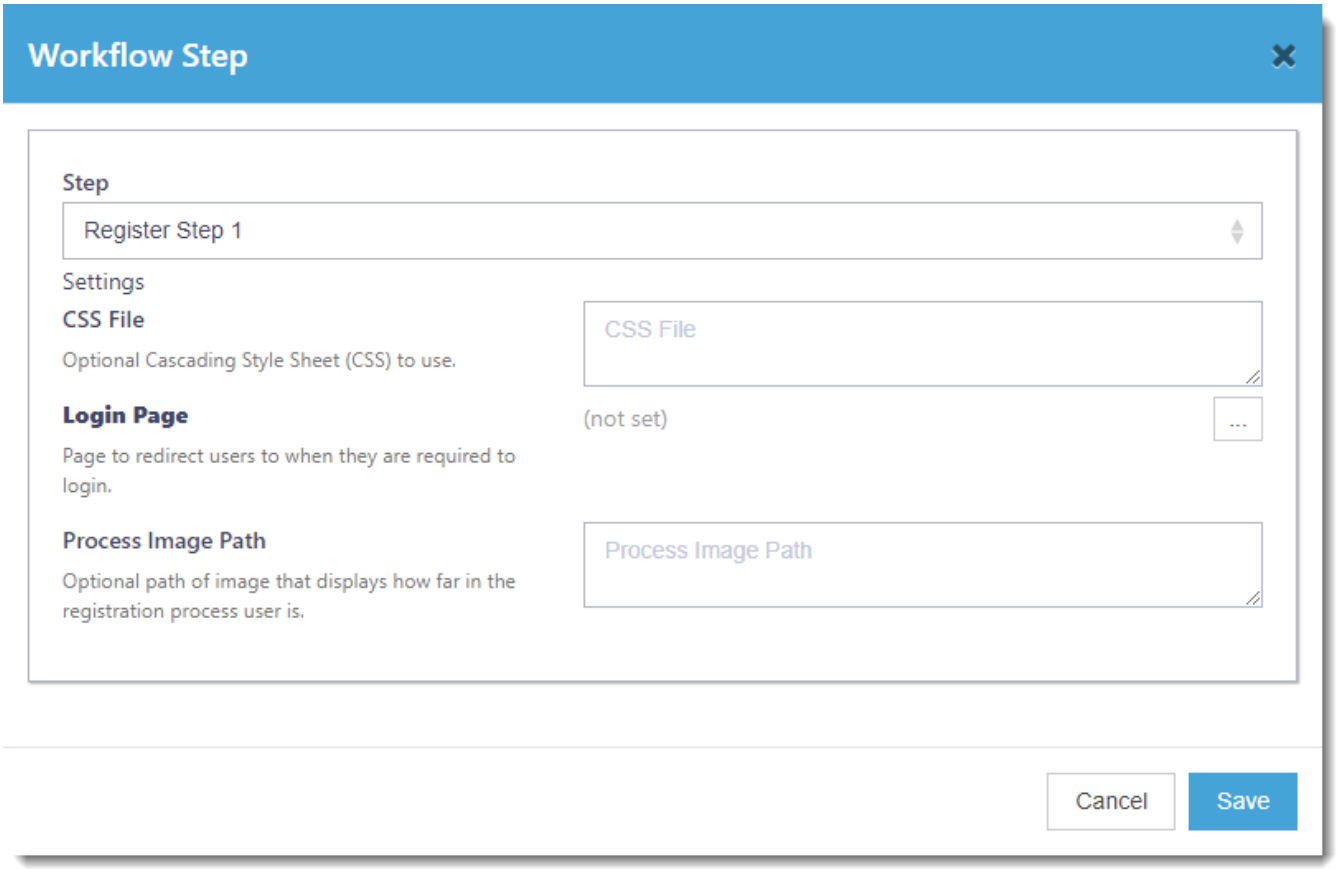
1. Click the **Add New Step** icon to select and customize each step.



2. Select a **Register Step**.

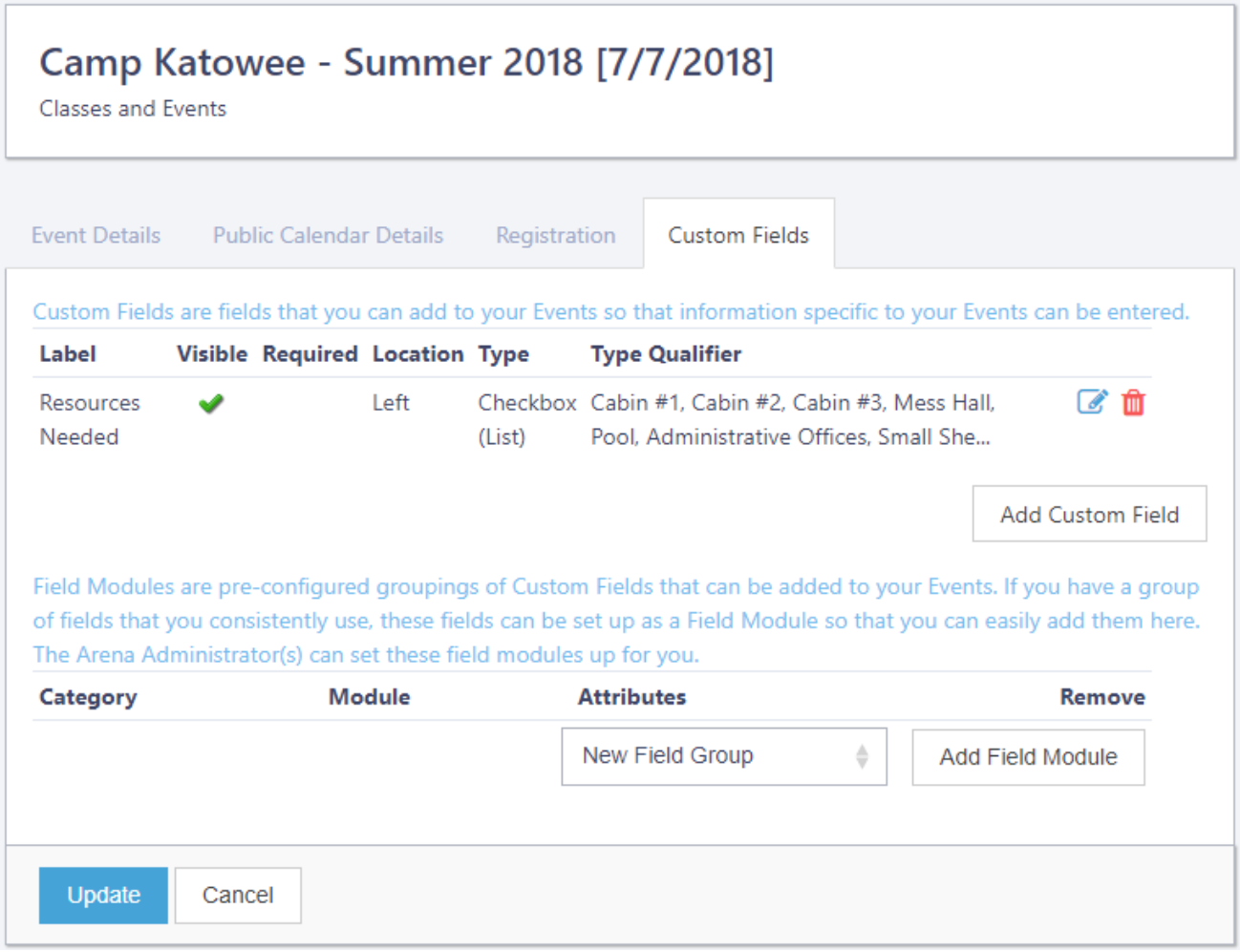


3. Customize the step, as desired and then click the **Save** button.



Add Custom Fields to an Event Tag

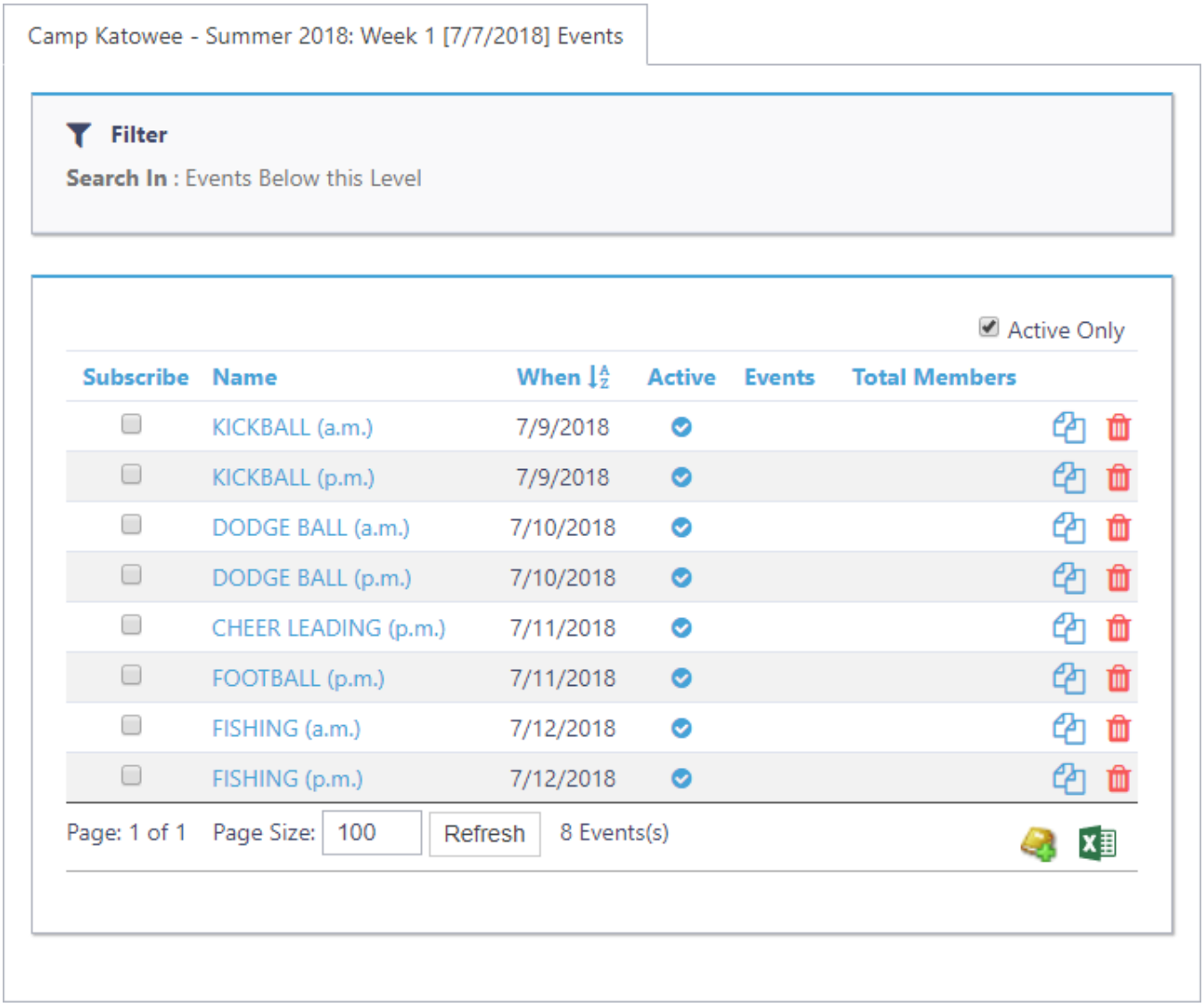
Click the **Custom Fields** tab to add custom fields for internal use. If you are using sub-events, you can create custom fields for the 'main' tag as well as the sub-events. Below is an example of how custom fields can be used to assign resources needed for an event.



Sub-Events tab

The first tab listed under an Event is the Sub-Events tab. This tab is used for adding or modifying Sub-Event tags. Sub-Events tags can be added under an Event tag to track separate classes or activities that occur within the event (e.g. breakout classes or activities that require a separate sign-up).

1. Click the **Add New Events** icon to add a Sub-Event. The steps to create a Sub-Event are the same as creating an Event except there is not a **Sub-events Enabled** check box or a **Sub-events Type** drop-down on the Event Details tab. See the Add a New Event Tag section for details.



NOTE: Click on the **Subscribe**, **Name**, **When**, **Active**, **Events**, or **Total Members** header to sort the list of registrants by that header.

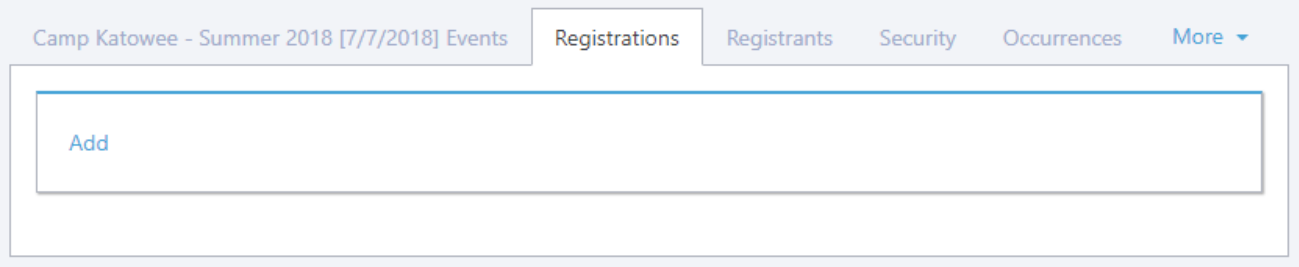
See the Subscribe to a Tag section for details on how to use the **Subscribe** check box.

Registrations tab

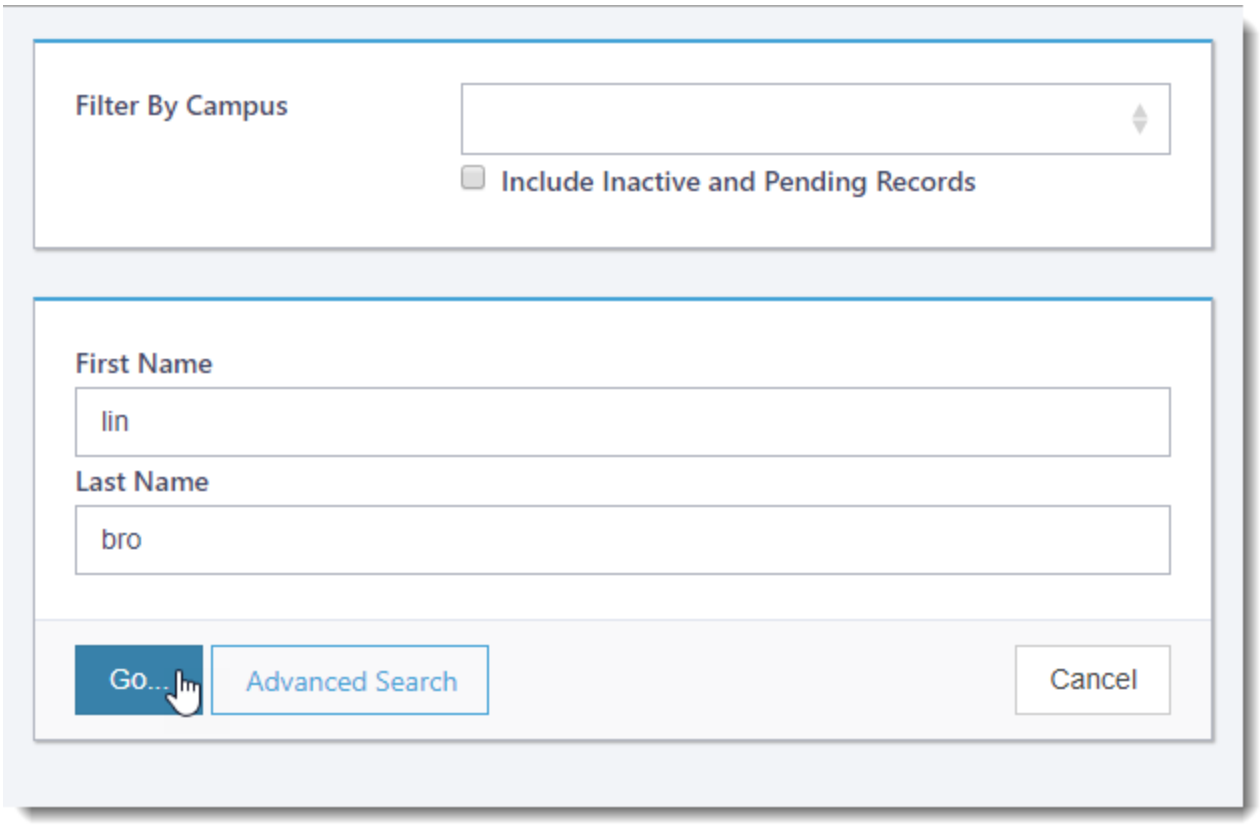
The Registrations tab is used to manually add a registration instead of having the registration sign up using the Arena-managed external portal. The Registration is the entity responsible for fees and costs. This could be an organization such as a church, a parent, another person who is responsible for the registrants that are assigned under the Registration. The registrants represent the individuals who are going to attend the event.

The following steps walk you through adding a Registration.

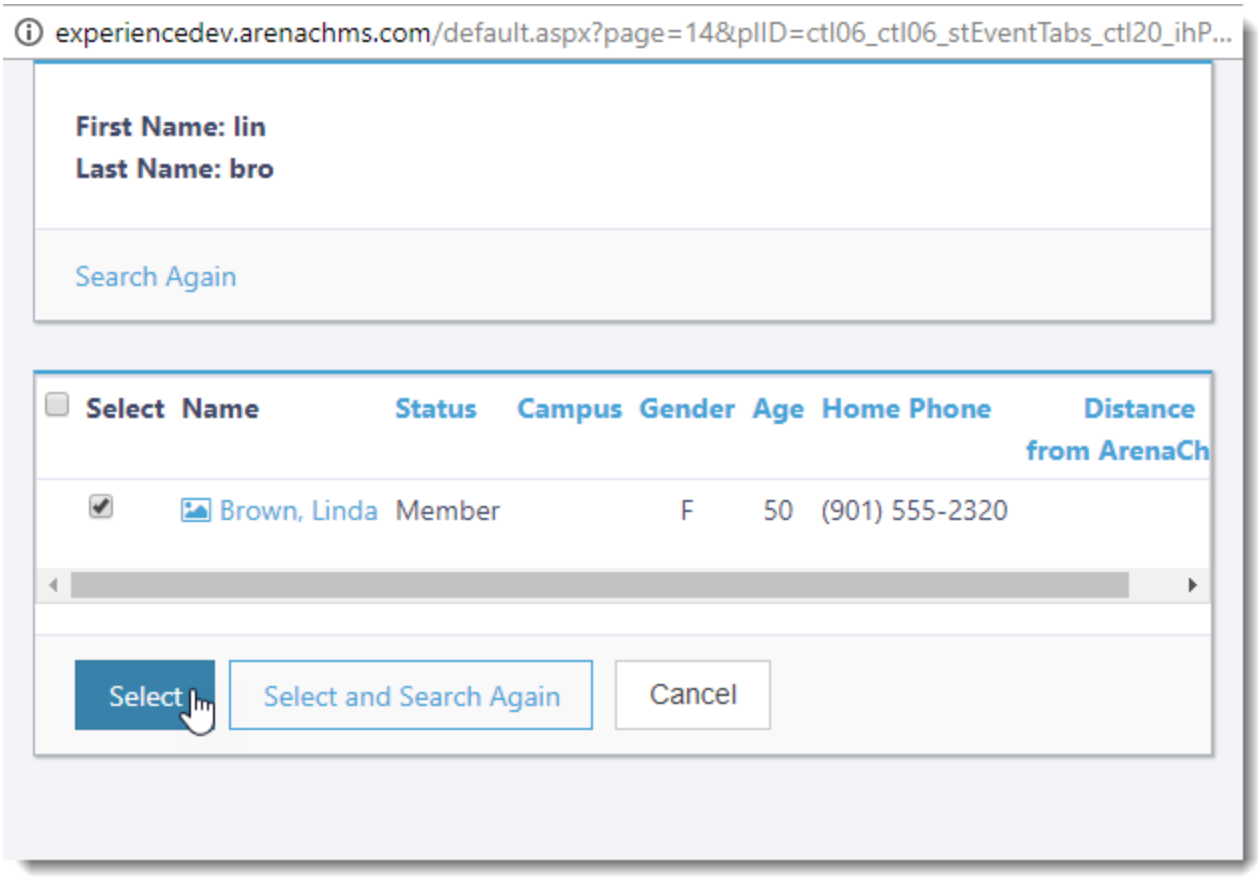
1. Click the ***Add*** link to add a new registration.



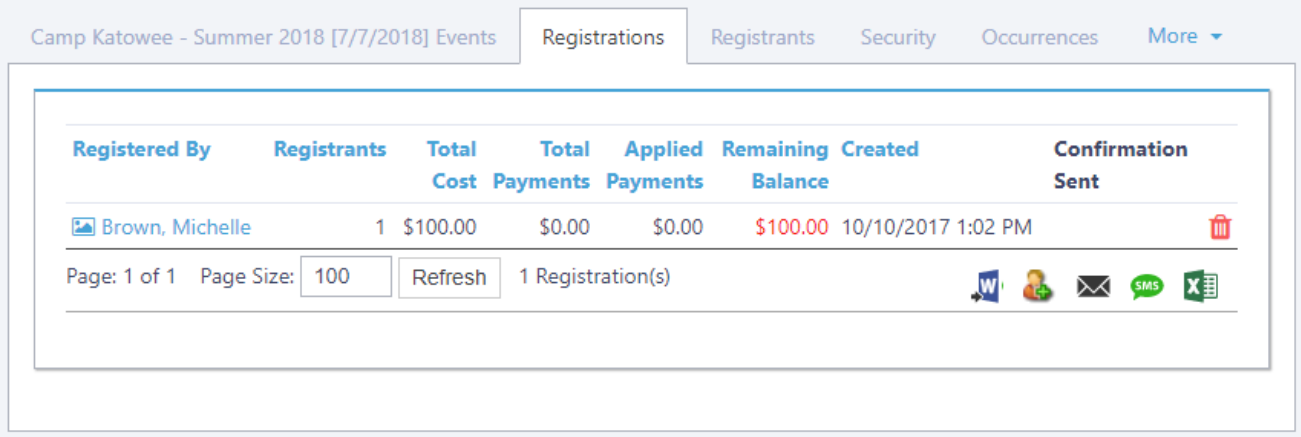
2. Enter criteria to find an individual you would like to add and then click the **Go** button.



3. Select the individual and then click the **Select** button.



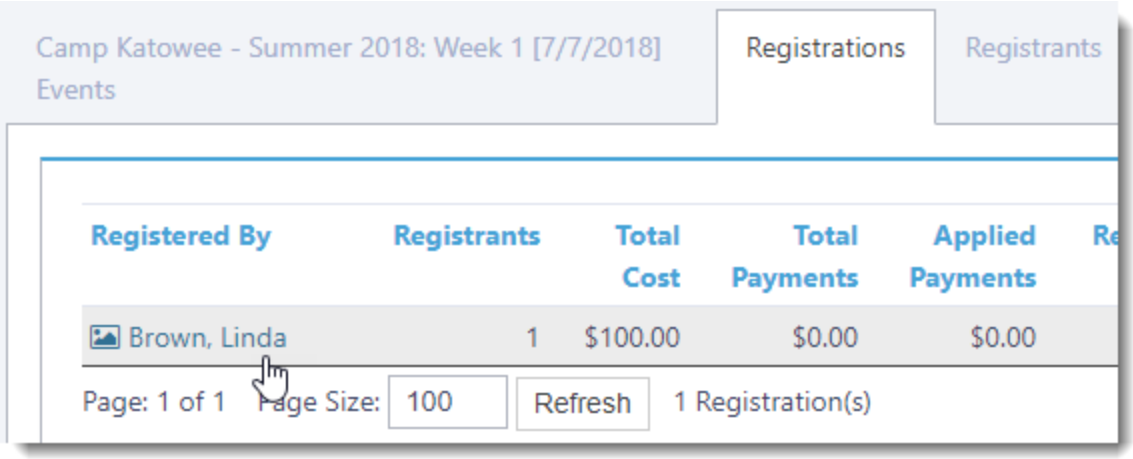
4. Notice that the individual is now listed on the Registrations tab. Click the **Add New Registration** icon to add more registrations or click the **Delete** icon to remove a registration.



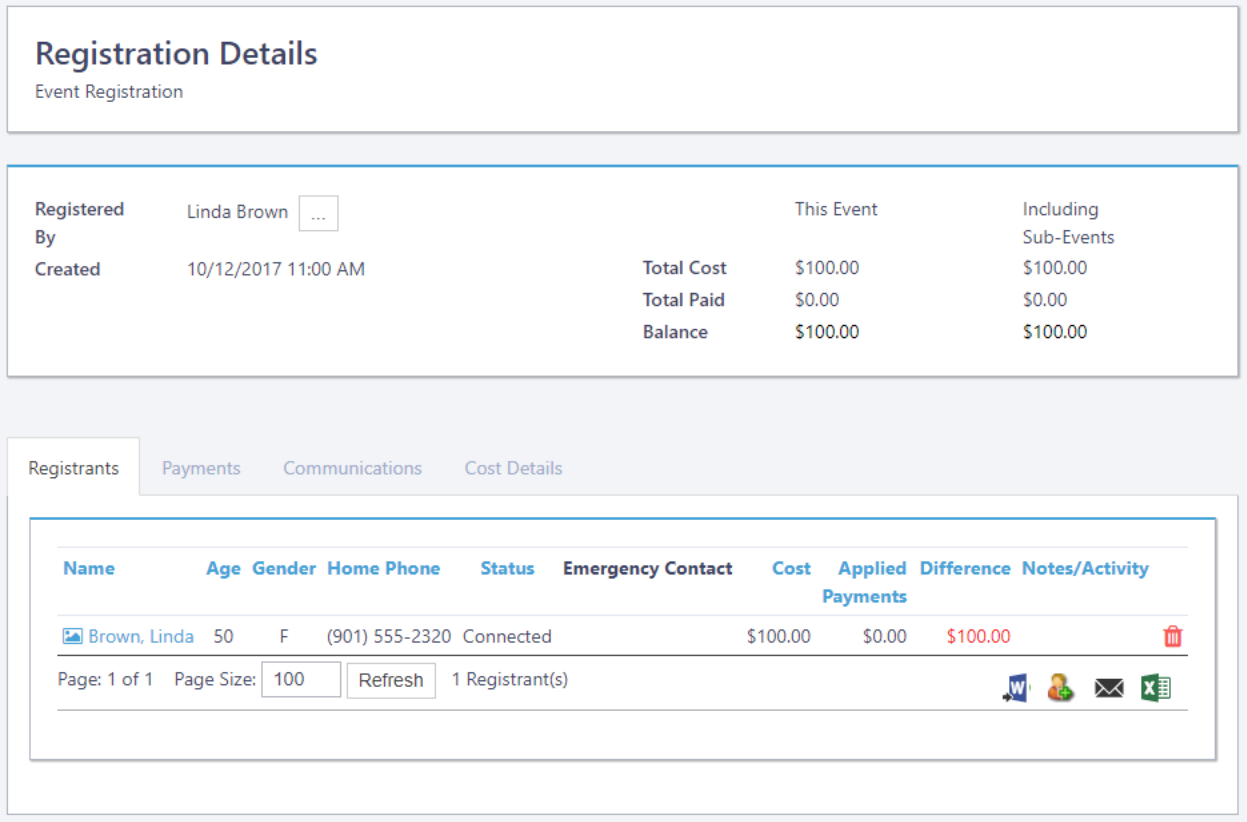
NOTE: Action icons are located at the bottom right-side of the Registrations tab. These icons can be used to perform a Word Mail Merge, Send Email, Send Text Message, or Export Data to Excel to help you communicate with the Registrations.

Registration Details Page

1. After a registration has been added, click on the ***Registration*** link to view the **Registration Details** page.

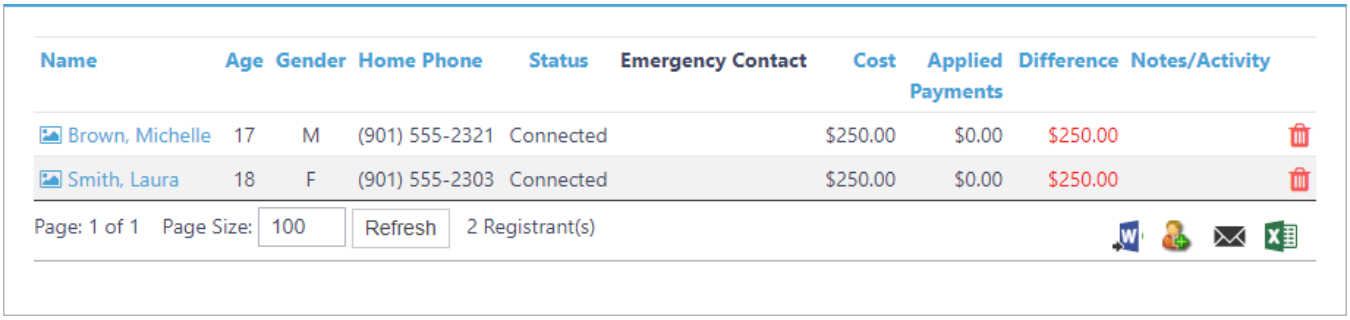


2. The **Registration Details** page appears. From here, you can change the Registration by clicking the **Search** icon. There are four tabs on this page.
   - **Registrants**: Use this tab to display all registrants for this single registration. You can also delete existing registrants or add more registrants for a registration. (For example, to register two children by a parent, add the parent on the **Registration** tab then delete the parent as a registrant and add both of the children as registrants.)
   - **Payments**: Use this tab to enter payments for each registrant for this registration.
   - **Communications**: Use this tab to send the registration email to the registering person.
   - **Cost Details**: Use this tab to display the payment details for each registrant.



Registrants tab

The Registrants tab displays the registrants that are assigned the Registration along with some details about each registrant such as the phone number, payment information, and any custom fields (e.g. Emergency Contact).



The following actions can be taken on this tab:

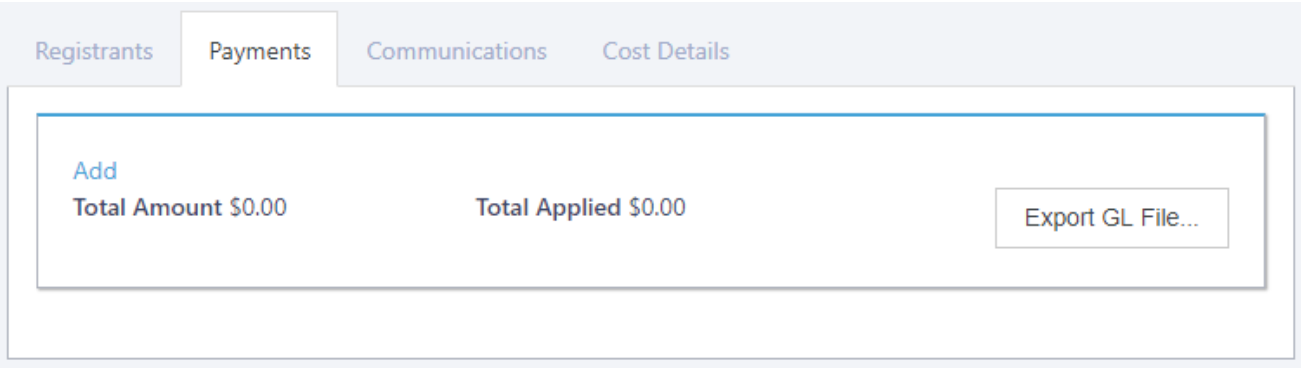
- Click the **Delete** icon to remove a registrant.
- Click the ***Registrant Name*** link (e.g. Brown, Michelle) to make modifications to a registrant's registration information.
- Click the **Add New Registrant** icon to add more registrants under this registration.
- There are also action icons listed at the bottom which allow you to do a Word Merge ,

email , or Excel export for the registrants listed on this tab.

- Click on the **Age**, **Gender**, **Home Phone**, **Status**, **Cost**, **Applied Payments**, **Difference**, or **Notes/Activity** header to sort the list of registrants by that header.

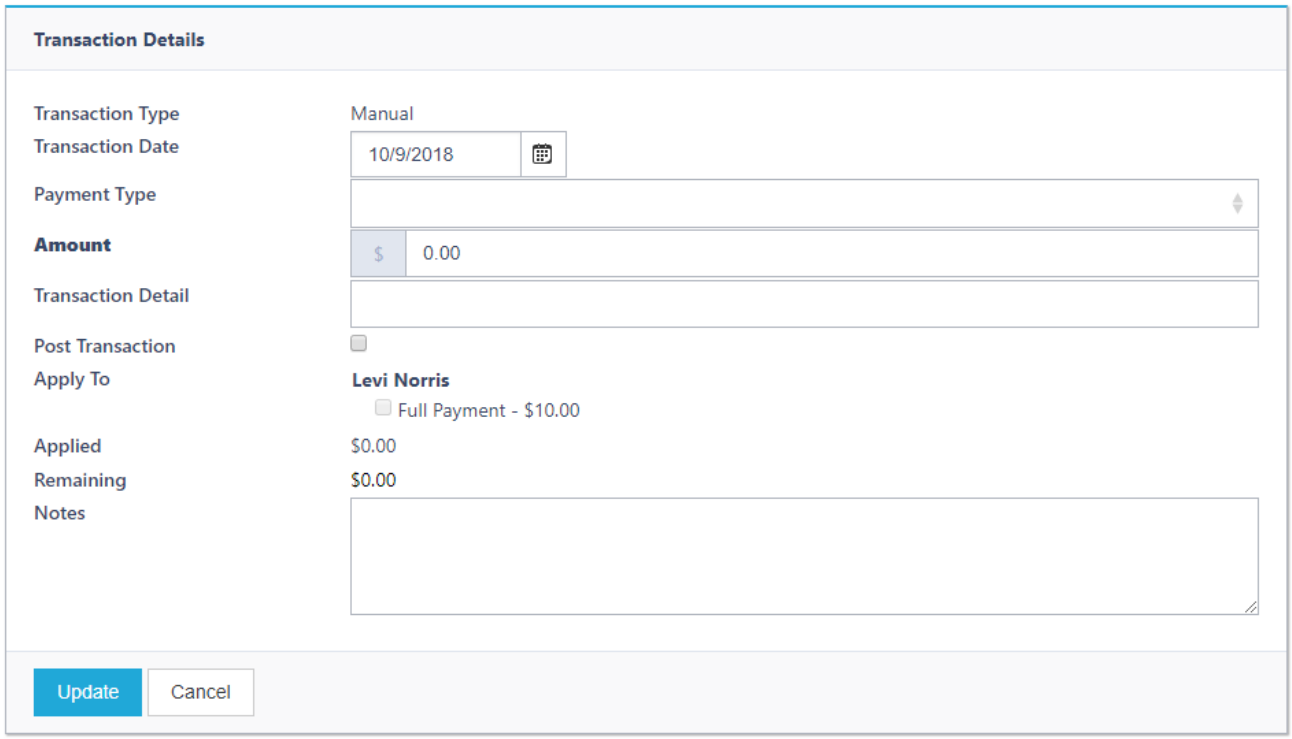
Payments tab

The Payments tab displays your payment details and allows you to add new payments by either clicking the ***Add*** link if no payments have been added or by clicking the **Add New Transaction** icon if payments have been added.



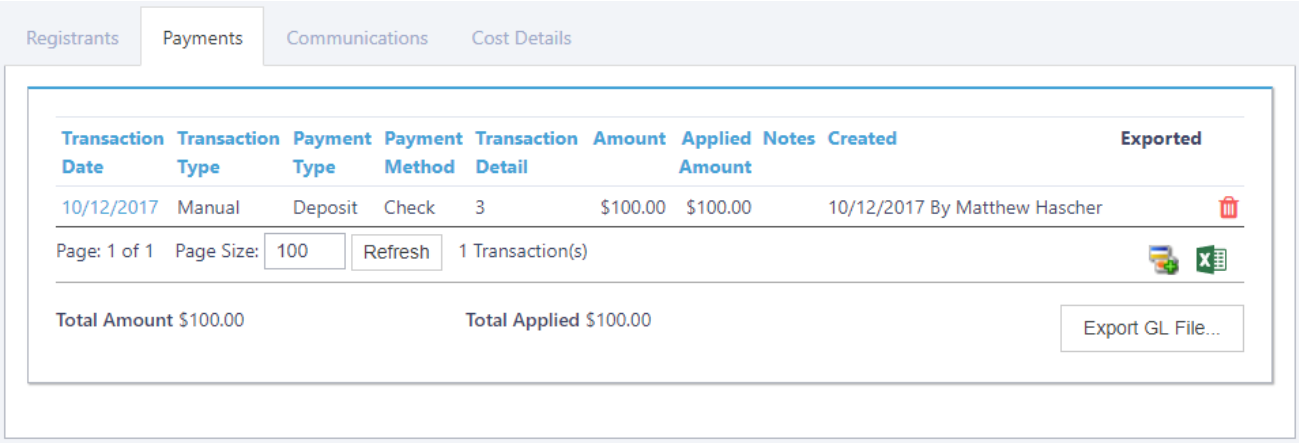
This is the Transaction Detail screen where manual payments are added.

Check the **Post Transaction** box to post a transaction from a credit card. You can then select an existing payment method or add a new one.



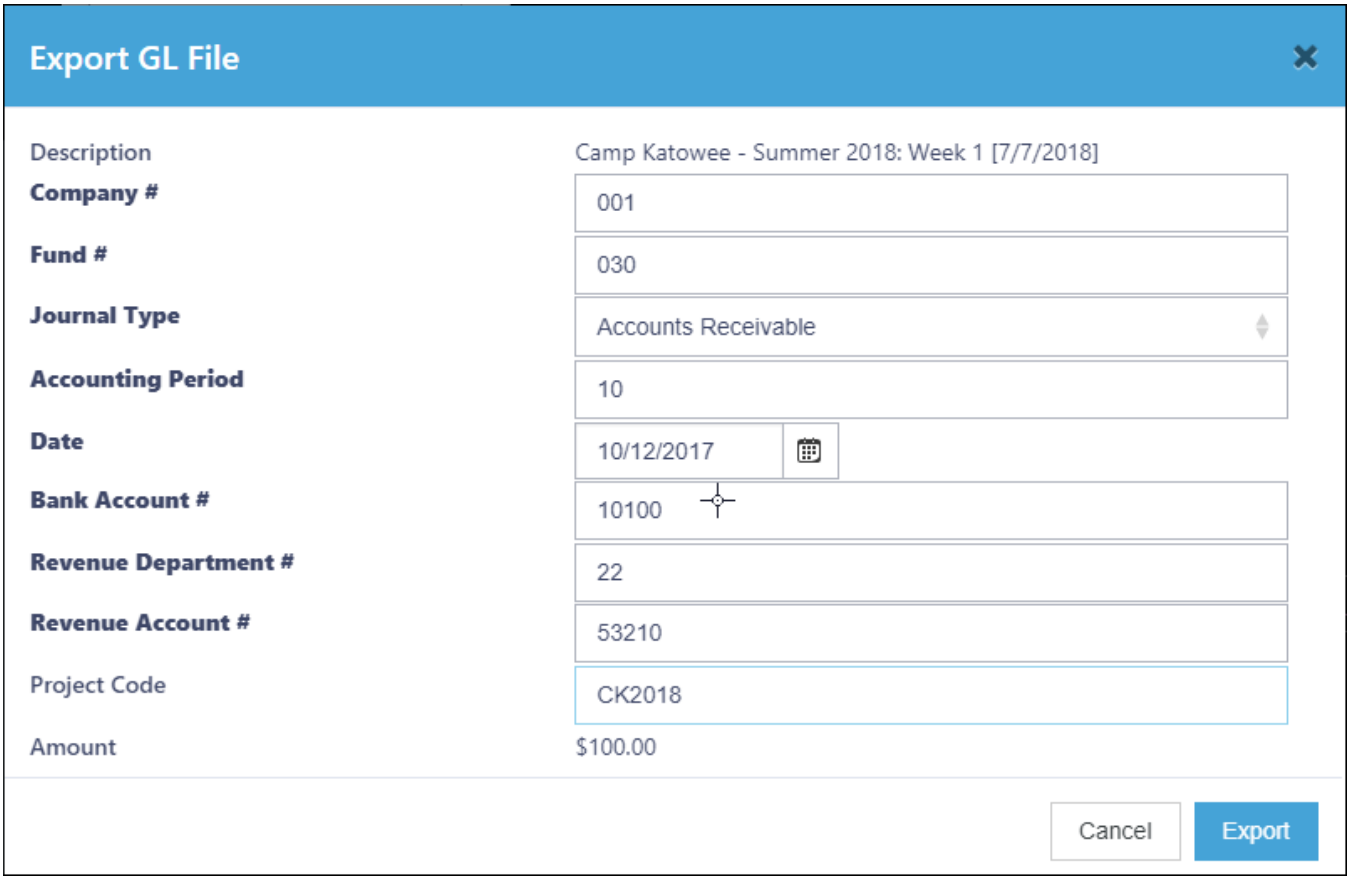
Below is an example image of how the Payments tab displays after adding a payment. Notice

there is also an **Export to Excel** icon that can be used to export your payments to an Excel spreadsheet by clicking this icon.



Export GL File

Click the **Export GL File** button and enter the specifications for the export file. When finished entering the specifications for the file, click the **Export** button to export the file.

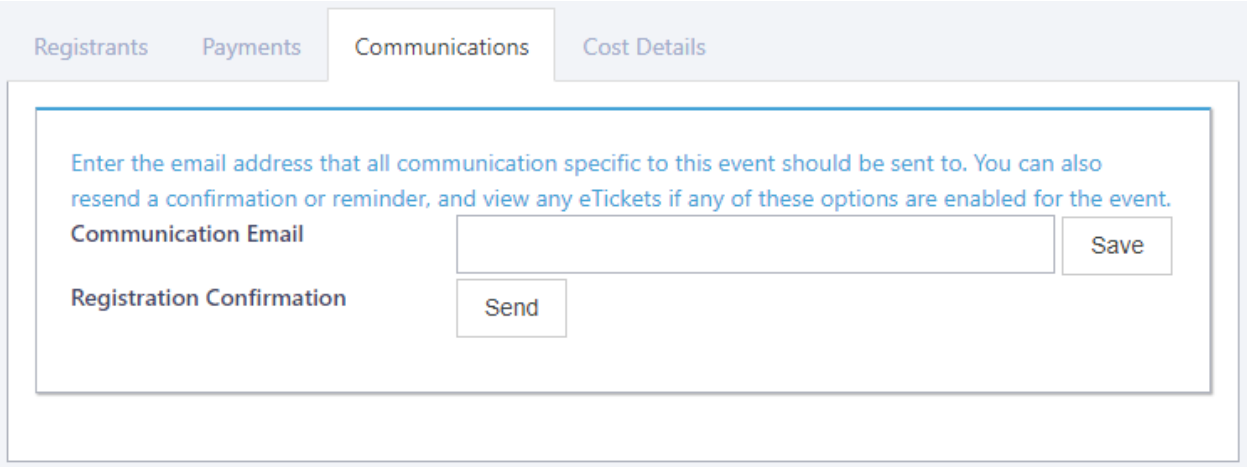


Communications tab

Some registrants may want all the emails concerning this event be sent to a specific email address, which may not be the email address on the Person Detail page. This tab allows you to specify an

email address for all communications with the registration concerning this event.

- **Communication Email**: Enter the event specific email (if applicable) for this registrant and then click the **Save** button.
- **Registration Confirmation**: Click the **Send** button to send a confirmation email to the registration. (The specifics of the Confirmation message can be modified on the **Event Tag** > **Edit Details** > **Registration** > **Communication** tab.)



Cost Details tab

The **Cost Details** tab displays the detail cost information for each registrant.

Registrants | Payments | Communications | Cost Details

Laura Smith

	Cost	Qty	Sub Total	Discount	Total
Deposit 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	$50.00		$50.00		$50.00
First Payment 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	$100.00		$100.00		$100.00
Final Payment 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	$100.00		$100.00		$100.00
Total Cost for Laura					**$250.00**

Michelle Brown

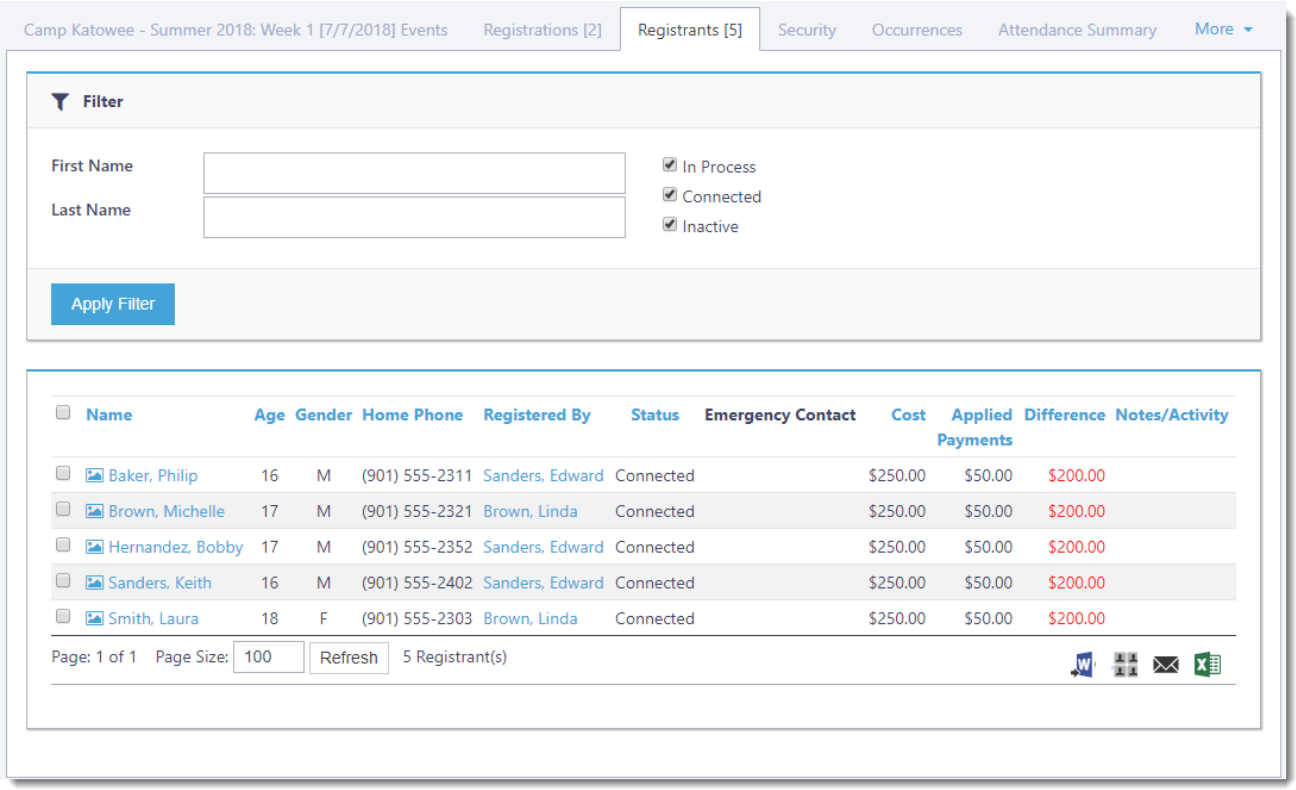
	Cost	Qty	Sub Total	Discount	Total
Deposit 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	$50.00		$50.00		$50.00
First Payment 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	$100.00		$100.00		$100.00
Final Payment 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	$100.00		$100.00		$100.00
Total Cost for Michelle					**$250.00**

Registrants tab

The **Registrants** tab displays all registrants regardless of which Registration they are under. The "Registered By" column lists which Registration this registrant is under.

There are filters for **First Name**, **Last Name**, and the **Status** check boxes. Some details about

each registrant such as the phone number, payment information, and any custom fields (e.g. Emergency Contact) are listed on the grid.



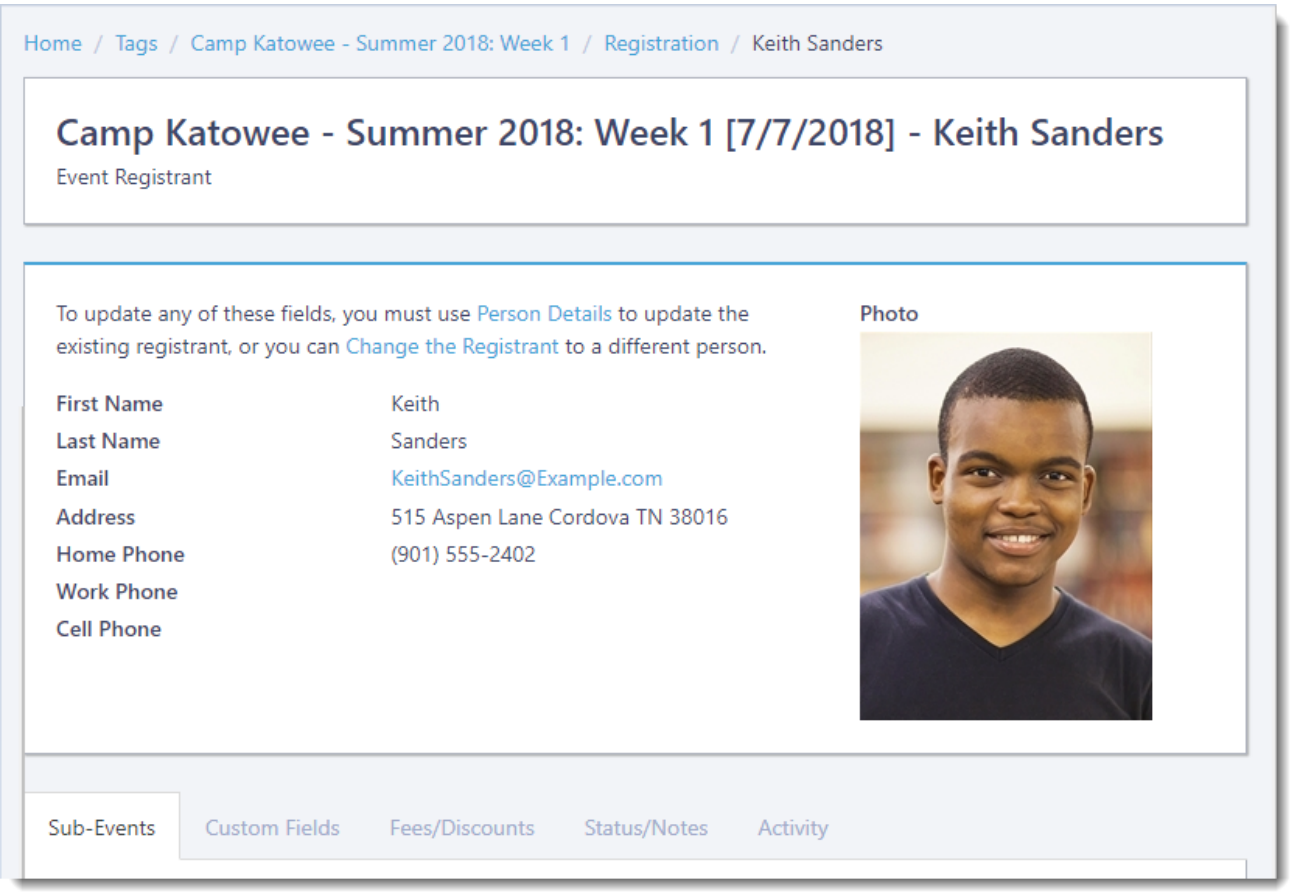
The following actions can be taken on this tab:

- Click the ***Registrant Name*** link (e.g. Sanders, Keith) to view the Registrant Details page.
- Click the ***Registration Name*** link (e.g. Sanders, Edward) to view the Registration Details page.
- Action icons are listed at the bottom which allow you to do a Word Merge , Bulk Update , email , or Excel export for the registrants listed on this tab.
- Click on the **Age**, **Gender**, **Home Phone**, **Registered By**, **Status**, **Cost**, **Applied Payments**, **Difference**, or **Notes/Activity** header to sort the list of registrants by that header.

Registrant Detail Page

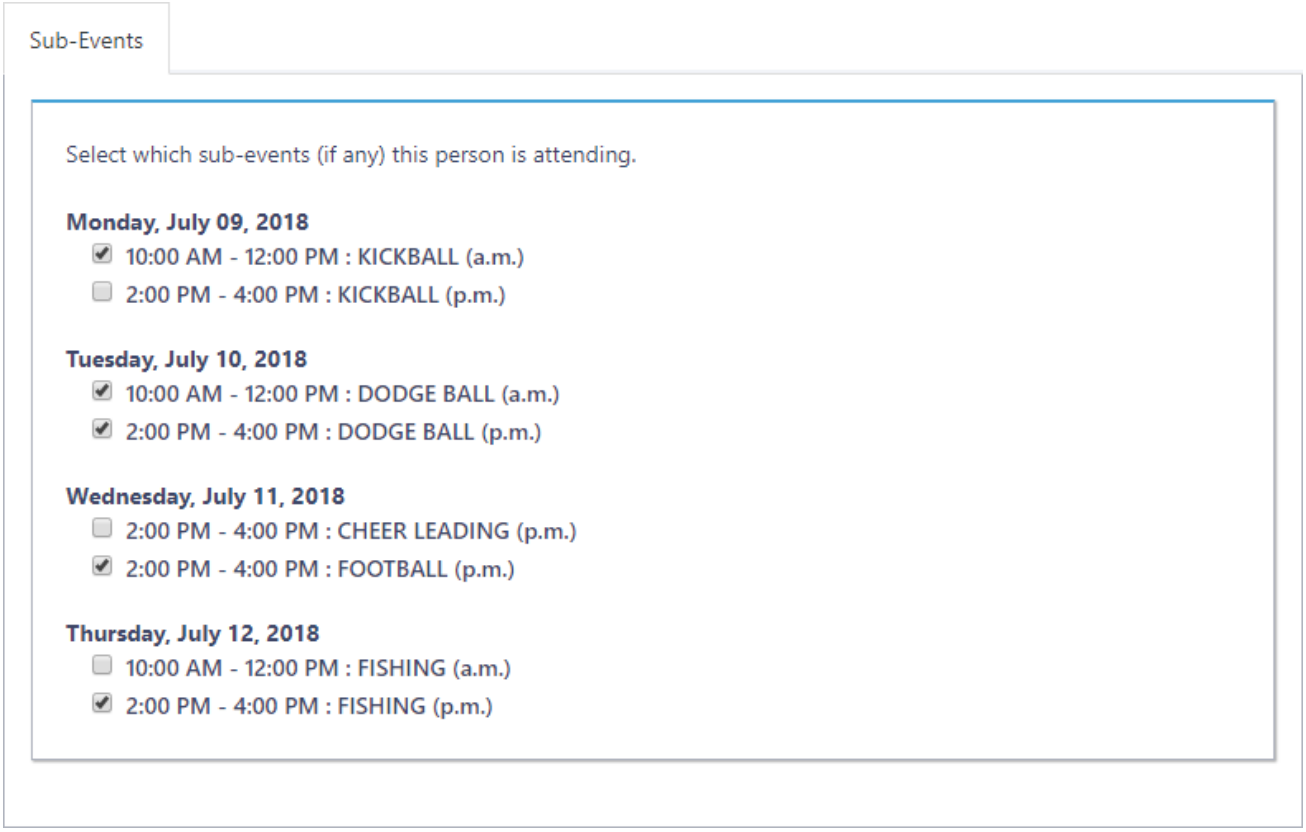
After clicking the ***Registrants*** link, the **Registrant Details** page appears. The Registrant Details page lists information about the Registrant at the top of the page and there is a link to the Person Details page (e.g. Person Details) and also a link to change the registrant (e.g. Change the Registrant).

There are 5 tabs at the bottom of the page: Sub-Events, Custom Fields, Fees/Discounts, Status/Notes, and Activity.



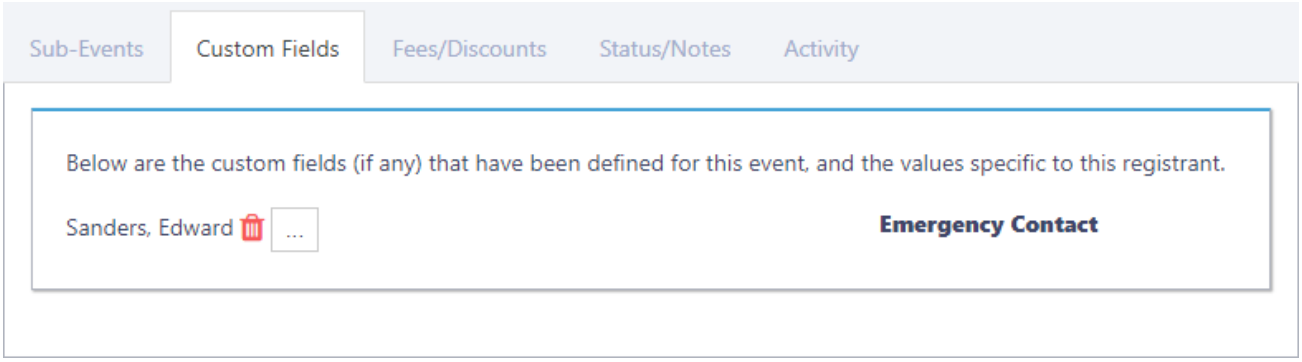
Sub-Events

The Sub-Events are listed as check boxes. Check the sub-events that the registrant has select to attend.



Custom Fields

The Custom Fields tab is an optional feature to the registration process. Custom Fields are setup on the **Edit Details** > **Registration** > **Fields** > **Custom Fields** section of the Event tag. Although using Custom Fields is optional, a custom field can be marked as required.



Fees/Discounts

The Event Costs, Additional Fees, and Discounts are displayed on the **Fees/Discounts** tab. Click the **Edit** icon to make changes to an Additional Fee and select a Discount as appropriate for the registrant.

Sub-Events | Custom Fields | Fees/Discounts | Status/Notes | Activity

Event Costs

The cost(s) of this event are listed below. If the "Current Event Cost" and the "Cost to Registrant" amounts are not equal, this is because either the cost of the event has changed since this registrant was added to the event, or the amount has been overriden for this registrant.

Description	Payment Date	Discount Applies	Fully Paid	Amount Paid
Deposit ($50.00) 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1	10/12/2017	✔	✔	$50.00
First Payment ($100.00) 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1		✔		$0.00
Final Payment ($100.00) 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1		✔		$0.00

Additional Fees

Any additional fees for this event are listed here. The type can be updated for the registrant. The quantity can be updated if no payments to the fee have been made yet. The amount reflects the cost of the fee at the time this registrant was added to the event.

Fee	Type	Quantity	Payment Date	Discount Applies	Fully Paid	Amount Paid
Archery ($10.00) 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1		0				$0.00
Paintball ($20.00) 7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1		0				$0.00

Discounts

Any discounts that apply for this registrant. The early bird and group discounts where determined automatically when the registrant was added, however, they can be overriden.

7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1

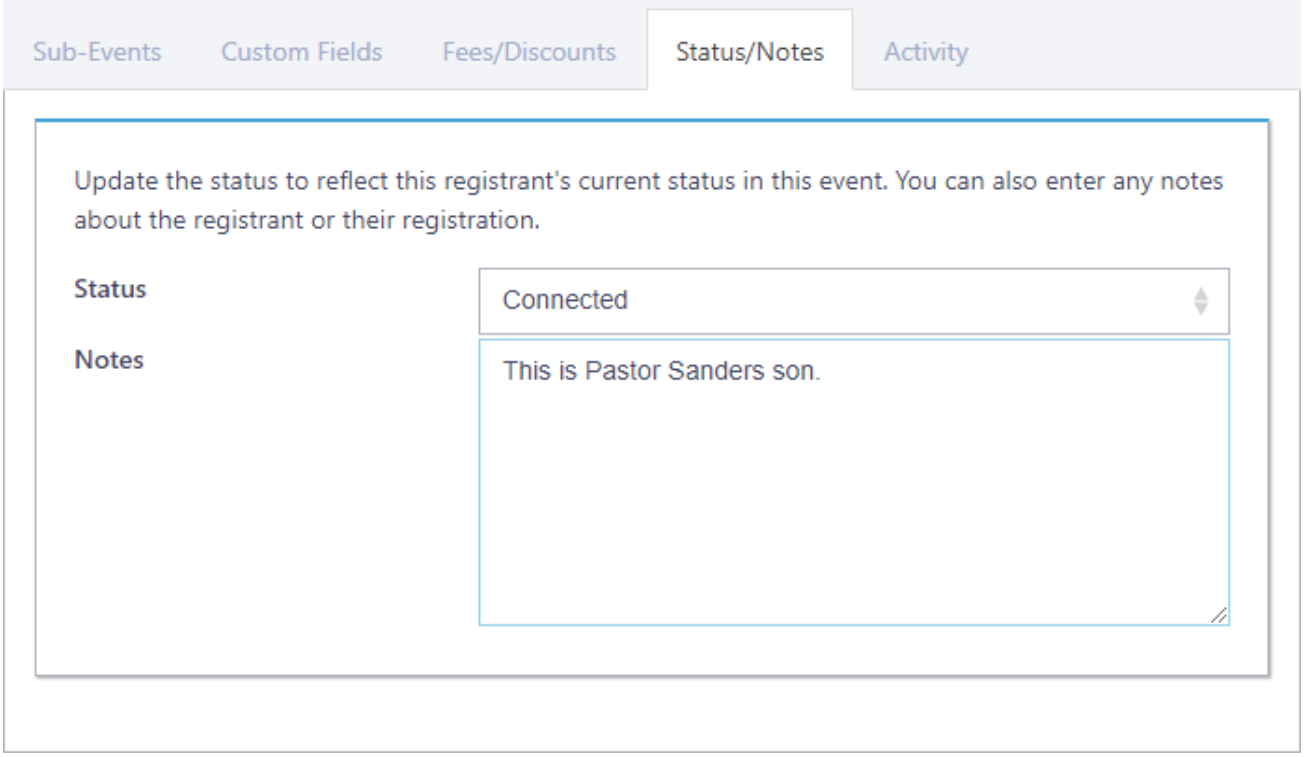
Early Bird Discount ☑ $50.00 per eligible fee/cost

Group Discount ☐ 20.00 %

Discount Code

Status/Notes

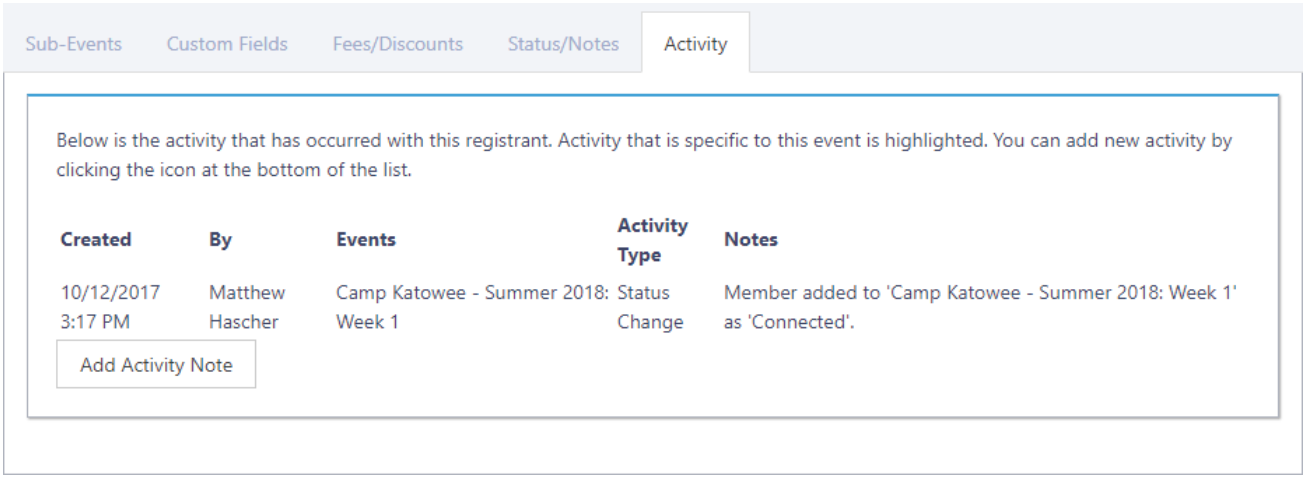
The Status of a registrant is set to "Connected" automatically. You can use the drop-down to set the status to either "In Process" or "Inactive" if that is appropriate for the registrant. Enter any notes as appropriate for the registrant.



NOTE: Other Status options can be set on the **Administration** > **Tag Member Status** page by assigning the Status Category to "A". The "In Process", " Inactive" and any Status set to "A" display on Status drop-downs for Personal, Ministry, and Event tags.

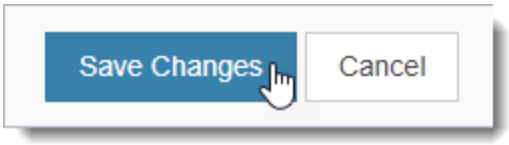
Activity tab

The **Activity tab** displays the activity for this event that occurred in regards to the registrant. For example, when the registrant is added to the tag, an Activity Note is automatically created. Click the **Add Activity Note** button to add other activity information such as a phone call, email, personal correspondence, or other information.



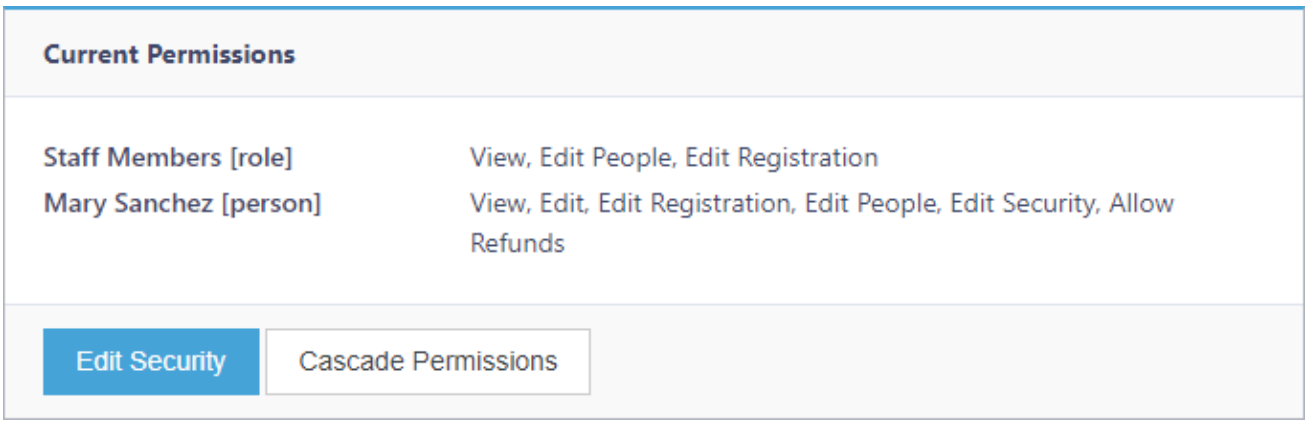
After making any changes to the **Registrants** page (including the Sub-Events, Custom Fields,

Fees/Discounts, Status/Notes or Activity tabs), click the **Save Changes** button.



Security tab

The **Security** tab is used to control who has rights to view and edit a tag. The users and roles are listed on the Security Tab along with the Current Permissions listed on the right-hand side.



Setting up Security

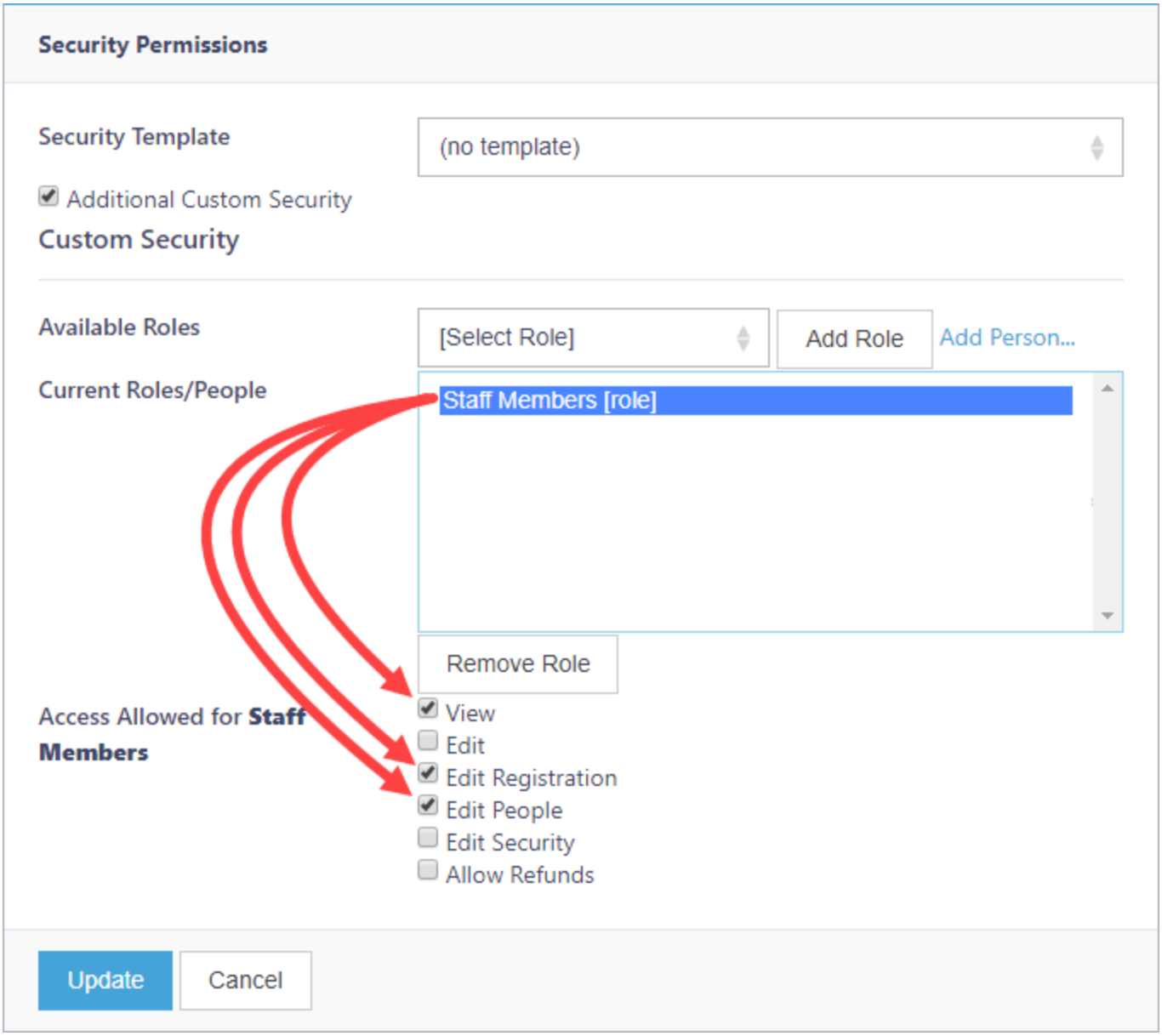
Click the **Edit Security** button to setup or modify the security permissions for a tag.

The security access is divided into 6 check boxes: View, Edit, Edit Registration, Edit People, Edit Security, and Allow Refunds.

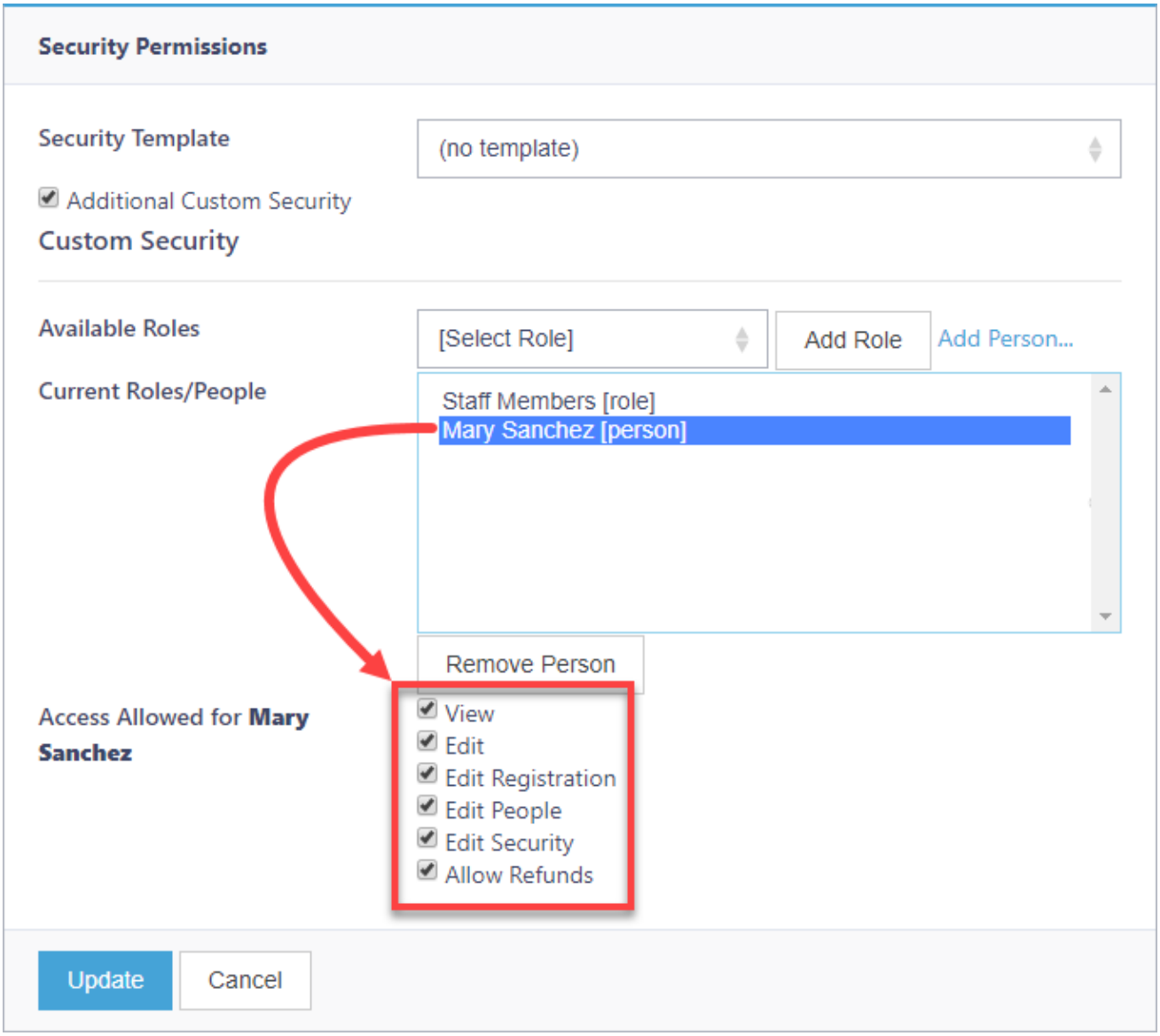
- **View**: This access allows users to the view the tag.
- **Edit**: This access allows users to edit the tag details.
- **Edit Registration**: This access allows users to edit Event Registration information. This option is only available for Event Tags.
- **Edit People**: This access allows users the ability to edit people in the tag.
- **Edit Security**: This access allows users the ability to edit security for the tag.
- **Allow Refunds**: This access allows users the ability to process refunds. This option is only available for Event Tags.

Each **security role** or **user** can be assigned security access independently of each other. For

example, you can set the **Security Role** of "Staff Members" to only have ***View***, **Edit Registration**, and ***Edit People*** access to an Event tag.



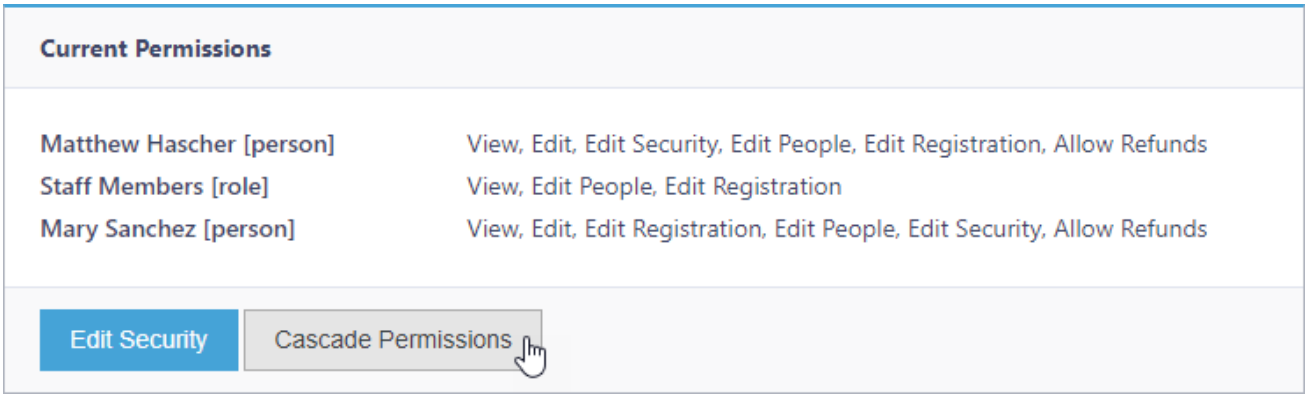
Or, you can set a **user** such as the Event Director (e.g. Mary Sanchez) to have all (**View**, **Edit**, **Edit Registration**, **Edit People**, **Edit Security** & **Allow Refunds**) rights to an event tag.



IMPORTANT NOTE: Be sure you always have at least one user or security role in this list with at least **View** and **Edit Security** permissions. Removing ***all*** users with **View** permissions from this list causes this to be a "lost" tag that no one can view. And, removing the **Edit Security** permissions prevents you from making any further changes to the security of this tag. (If no user is able to see the edit security tab, a global administrator will need to come and fix the security.)

Cascade Permissions

Click the **Cascade Permissions** button to overwrite the Current Permissions on all child tags with the Current Permissions assigned to the tag you are currently viewing. After clicking the Cascade Permissions button, you can go to any of the child tags and further customize the permissions if you want.



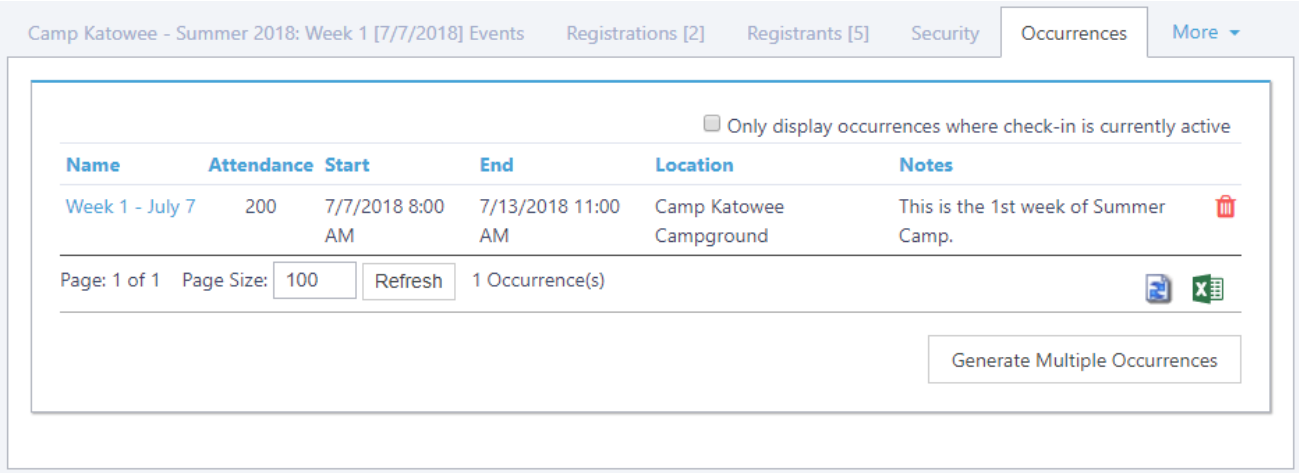
Because child tags automatically inherit the Current Permissions of a parent tag when the child tag is being created, the Cascade Permissions feature is normally used to assure there is a consistent security on all child tags after the parent tag security has been modified.

NOTE: If you are on the last level of a tag tree, the Cascade Permissions button effectively does nothing because there are no child tags under it to cascade the permissions to.

Occurrences tab

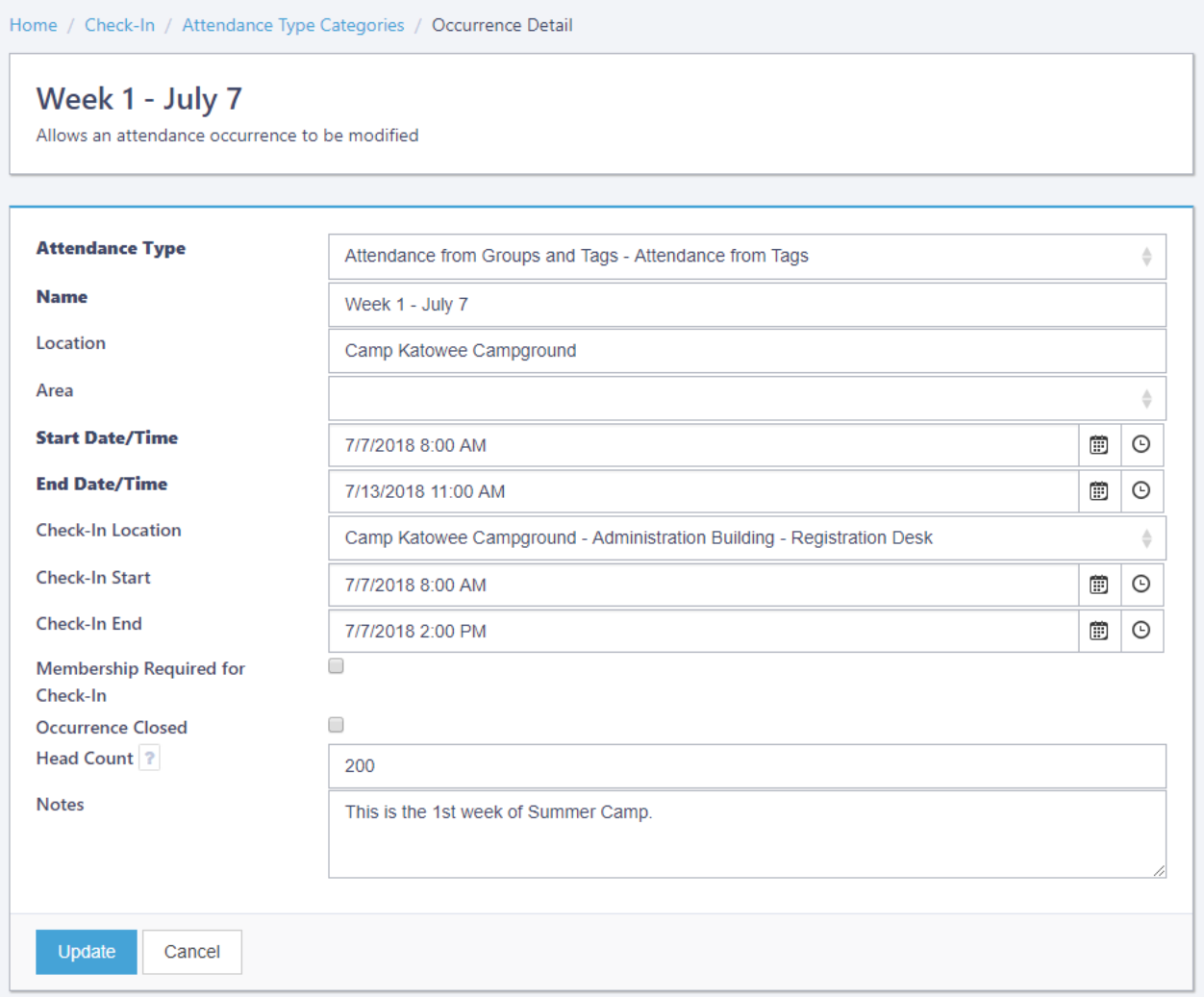
You can use Occurrences to track attendance and meeting dates (just like Group Occurrences). A future occurrence needs to be created in order to use the on-line registration.

1. Click the **Add New Occurrence** icon to add a new occurrence.
2. Click the **Generate Multiple Occurrences** button to add multiple occurrences.



3. Below are the fields available when adding a new occurrence.
   - **Attendance Type**: Select an Attendance Type to associate with the event. See Check-In for more information on Attendance Types. This is a required field.

- **Name**: Enter a name for this occurrence.
- **Location**: Enter the location for the event.
- **Area**: Select the area for the event.
- **Start/End Dates**: Enter the start date and end date for the event. If this is a multi-day event, create an occurrence for each day. The times display with the event on the Arena calendar.
- **Check-In Location**: If using Arena Check-In for the event, select a Check-In location.
- **Check-In Start/End**: If using Arena Check-In for the event, enter the start and end dates and times for check-in to be available for this event.
- **Membership Required for Check-In**: If using Arena Check-In, select this check box to limit Check-In to registrants only. Selecting this option overrides the age criteria.
- **Occurrence Closed**: If using Arena Check-In, select this check box to close.
- **Head Count**: If not using Arena Check-In, enter in a head count for this Occurrence. Head Count overrides any Attendance calculated by the system. Head Count does not affect Check-In Room Ratios.
- **Notes**: Enter notes for this occurrence, if desired.



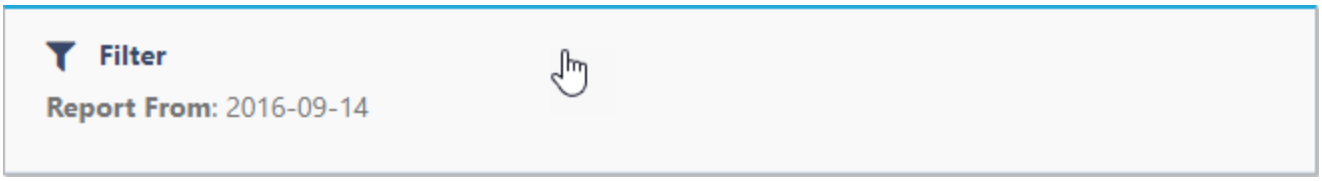
Occurrence dates and times display on the Event calendar of your Arena-managed website. For more information about occurrences, see the Check-In > Occurrences page.

4. Click the **Update** button to save and close the window.

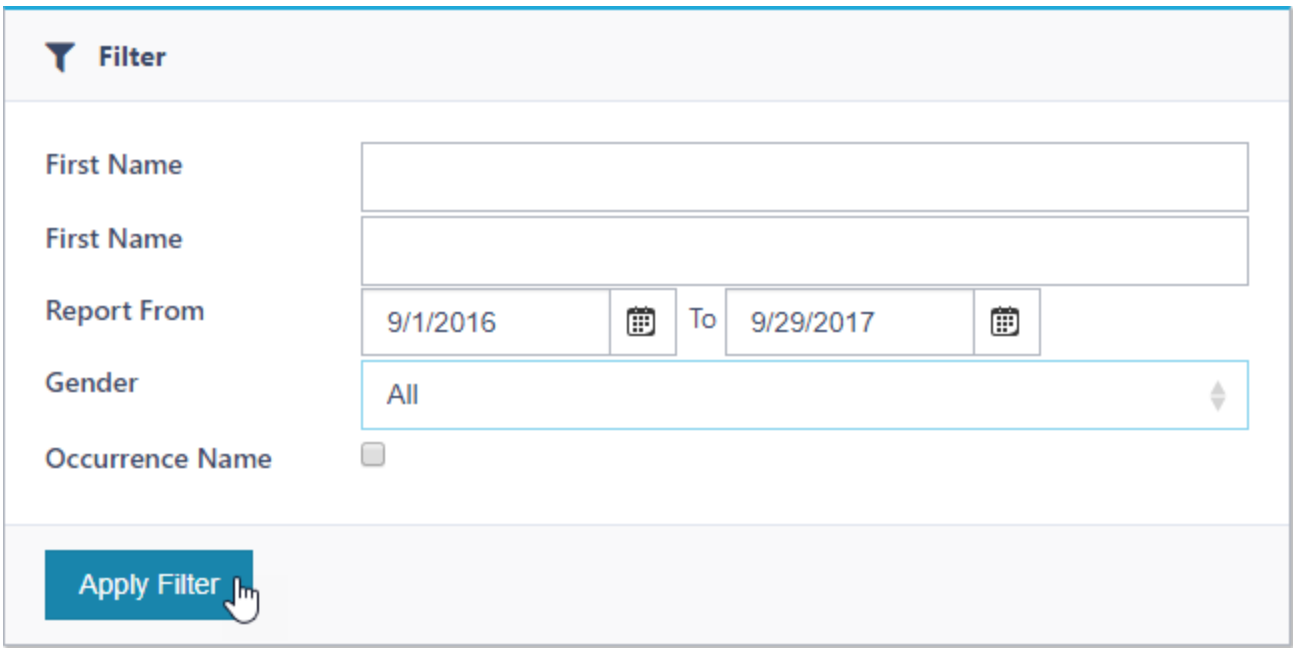
Attendance Summary tab

This tab displays a summary of occurrences for all registrants assigned to an Event tag. There are filters that control which records display on this tab.

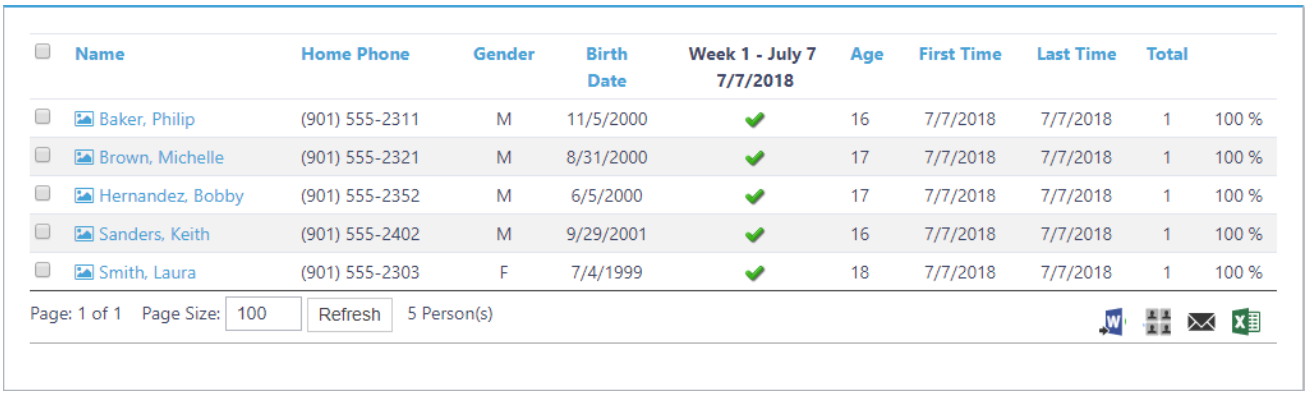
1. Click the **Filter** bar to change the date range or other criteria.



2. After setting the Filter criteria, click the **Apply Filter** button.



3. The **Attendance Summary** grid lists the registrants that have been checked-in or marked as attended and match the Filter criteria specified. Click the ***Name*** link to view an abbreviated personal information page.



Name	Home Phone	Gender	Birth Date	Week 1 - July 7 7/7/2018	Age	First Time	Last Time	Total	
Baker, Philip	(901) 555-2311	M	11/5/2000	✔	16	7/7/2018	7/7/2018	1	100 %
Brown, Michelle	(901) 555-2321	M	8/31/2000	✔	17	7/7/2018	7/7/2018	1	100 %
Hernandez, Bobby	(901) 555-2352	M	6/5/2000	✔	17	7/7/2018	7/7/2018	1	100 %
Sanders, Keith	(901) 555-2402	M	9/29/2001	✔	16	7/7/2018	7/7/2018	1	100 %
Smith, Laura	(901) 555-2303	F	7/4/1999	✔	18	7/7/2018	7/7/2018	1	100 %

Page: 1 of 1 Page Size: 100 Refresh 5 Person(s)

NOTE: Registrants can be marked with attendance on the **Occurrences** tab by using either the "Quick Entry" or "Manual Entry" tabs.

Action icons

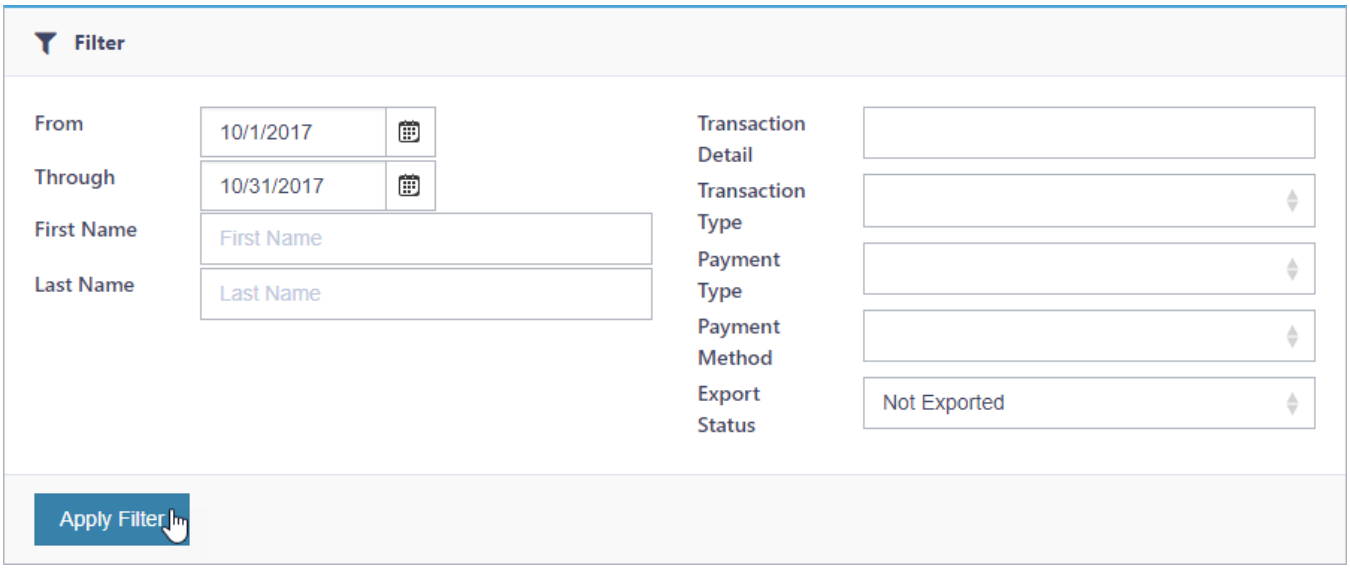
Action icons are located at the bottom right-side of the Attendance Summary grid. These icons can be used to perform a Word Mail Merge, Bulk Update, Send Email, or Export Data to Excel. After selecting members from the list, click the corresponding icon.

Transactions tab

The **Transactions** tab allows you to filter transactions, view the transaction details, and export the transactions to a General Ledger file (GLTRN200.txt).

Filter

Enter your filter criteria under the Filter bar heading and then click the **Apply Filter** button to list the corresponding transactions.



View Transaction Details

1. Click on a ***Transaction Date*** link to view the transaction details.

Transaction Date	Transaction Type	Payment Type	Payment Method	Transaction Detail	Amount	Applied Amount	Registration	Registrants	Notes	Created	Exported
10/17/2017	Manual	Partial Payment	Check	Check #3028	$200.00	$200.00	Brown, Linda	Smith, Laura Brown, Michelle		10/17/2017 By Matthew Hascher	
10/17/2017	Manual	Partial Payment	Check	CK#2354	$200.00	$200.00	Brown, Linda	Smith, Laura Brown, Michelle		10/17/2017 By Josh Flippen	
10/16/2017	Manual	Partial Payment	Cash	5	$300.00	$300.00	Sanders, Edward	Baker, Philip Hernandez, Bobby Sanders, Keith		10/17/2017 By Matthew Hascher	

Page: 1 of 1 Page Size: 100 Refresh 3 Transaction(s)

Total Amount $700.00 **Total Applied** $700.00 Export GL File...

2. After clicking the Transaction Date, the Transaction Details page displays. Click **Update** button after making any changes or click the **Cancel** button to exit this page.

Transaction Details

Transaction Type: Manual

Transaction Date: 10/16/2017

Payment Type: Partial Payment

Payment Method: Cash

Amount: $ 300.00

Transaction Detail: 5

Apply To

7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1
Philip Baker (PAID) Deposit - $50.00

7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1
Bobby Hernandez (PAID) Deposit - $50.00

7/7/2018 - 7/13/2018 : Camp Katowee - Summer 2018: Week 1
Keith Sanders (PAID) Deposit - $50.00

Applied: $0.00

Remaining: $0.00

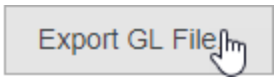
Notes

Update Cancel

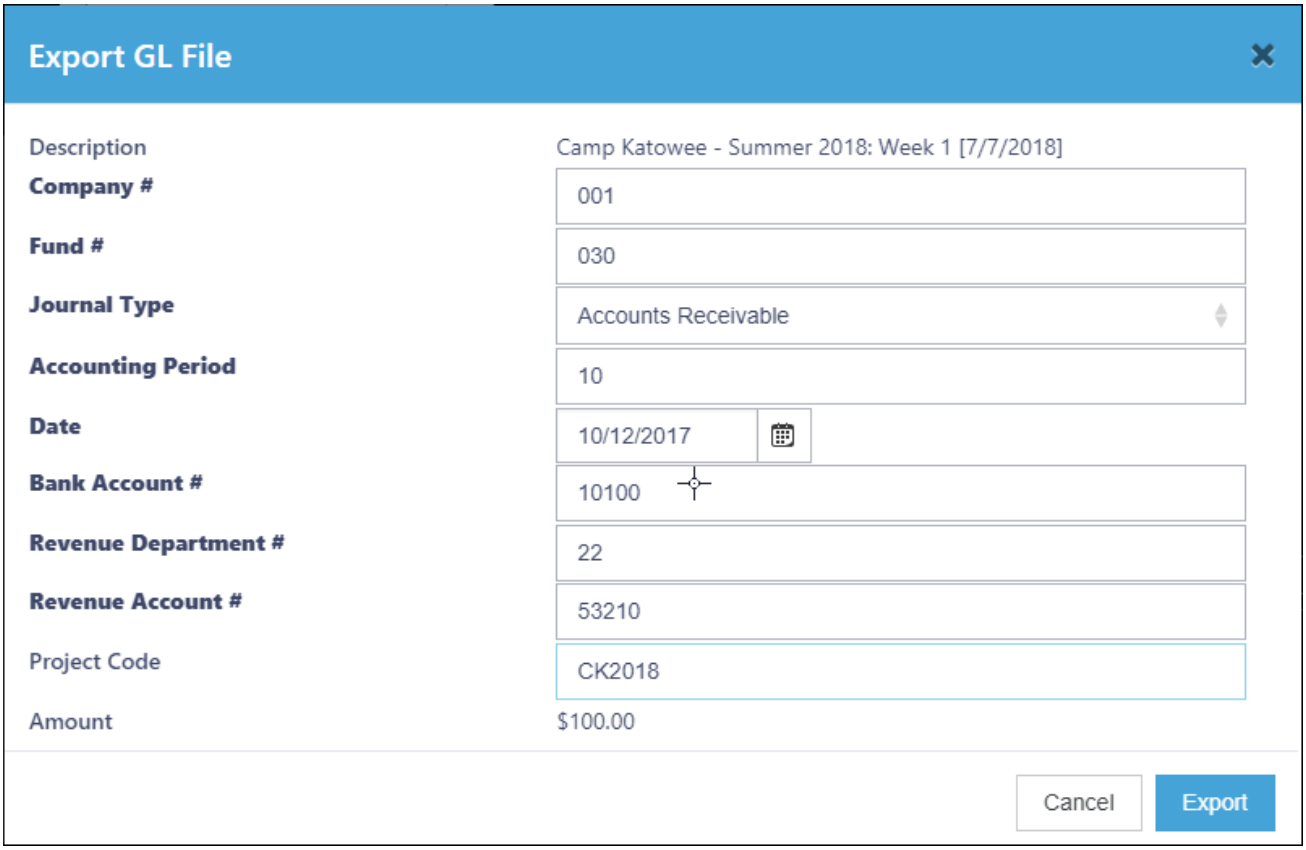
Export Transactions

Transactions for Event tags can be exported as a General Ledger file (GLTRN2000.txt). The file can then be placed in the v.5 data directory and imported into the General Ledger module when navigating to the Journal Entry page.

1. From the Transaction tab, click the **Export GL File** button.



2. Enter the specifications for the export file and then click the **Export** button when finished.

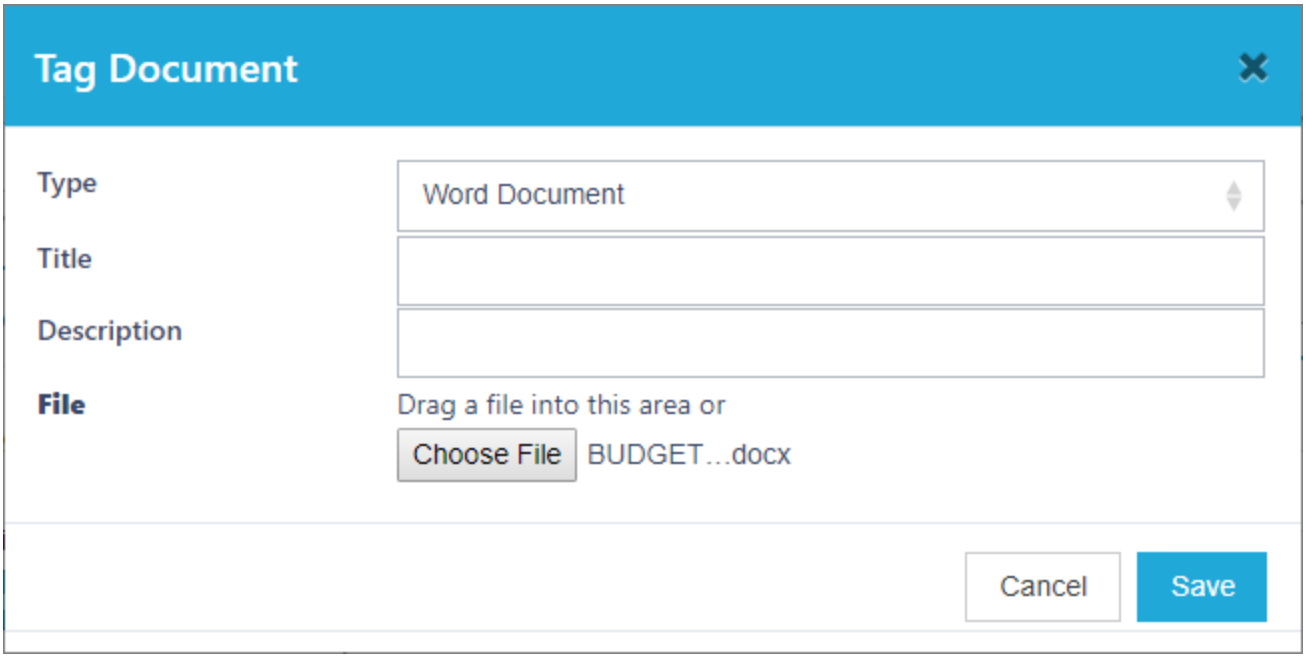


Documents tab

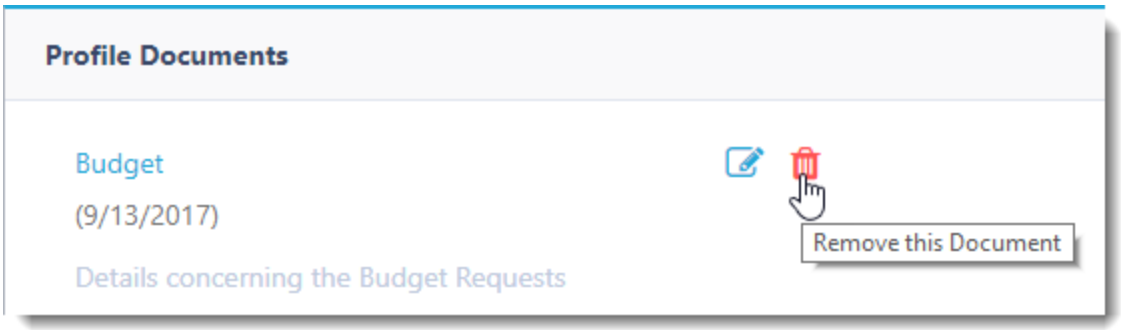
1. To add a document, click the **Add Document** button.

2. Specify the **File** location and then click the **Save** button.

NOTE: There are optional fields for the Type, Title, and Description.



3. After a document is added, you have the following options:
   - Click the **Edit** icon to make changes to the Type, Title, Description, or File Location.
   - Click the **Delete** icon to remove the document.



Considerations for Event Tags

Considerations when using Events:

- One discount can be applied per registrant.
- Use the My Registrations module to enable the ability for registrants to make additional event payments.

Considerations when using Sub-Events:

- Each sub-event has its own name, start time, end time, etc. Only sub-events with valid/current dates are available. So if the event runs longer than a sub-event, only available sub-events display.
- Custom Fields are only available for a parent, not for the sub-events.
- Each sub-event can also have its own costs, fees, and discounts.
- You can set registrant limit for each sub-event.
- The user makes one payment for multiple events when registering.
- Sub-events cannot have sub-events. You can only create one level of sub-events.
- This feature assumes the Registration and the Registrant are the same person, e.g., Bob Smith is registering for the Men's Conference AND two breakout (sub-events) sessions.

Considerations when using RSVP Events:

- This is a great option when you want to enable one person to register but specify if they are bringing additional people without completing a registration e-form for additional registrants.
    - Payments are accepted.
    - Discounts are not available.
    - Sub-events are not available.
- Arena adds only the person registering for the event to Arena.
- Total registrants are subtracted from the Maximum number allowed, if used.
- If the goal is to enable registration and allow one person to 'block tickets,' consider using an RSVP Event with the Anonymous registrant options.
- As you begin to implement Arena Event Tags for the purpose of online registration, it is beneficial to understand how Arena attempts to match event registrants with existing

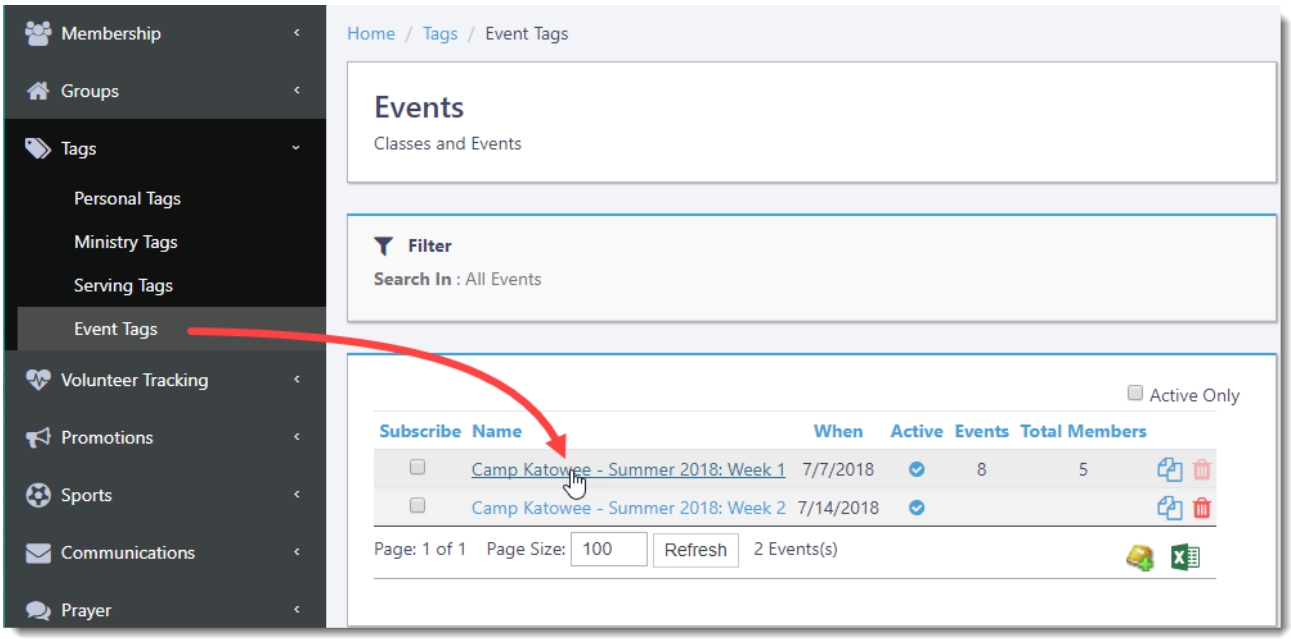
records:

- Arena attempts to match records based on last name, first name and birthdate, in this order.
- If the registrant enters a first and last name and a birthdate, Arena checks any current registrants and make sure there is not an existing record for the person. If the registrant does not enter a birthdate, this check does not happen.
- If the registrant enters a first and last name, Arena looks in the logged in person's family for a matching name.
- If the registrant enters a birthdate that matches an existing record, Arena searches the database for someone with the same name and birthdate.
- If Arena finds a match and the person is not a registrant, Arena adds the record as a registrant and to the database.
- If Arena finds a match, Arena adds the person as a registrant and updates fields such as address, phone numbers and email addresses and birthdate. A complete **MMDDYYYY** date format is required for the birthdate.

Manually Add a Payment for a Registration

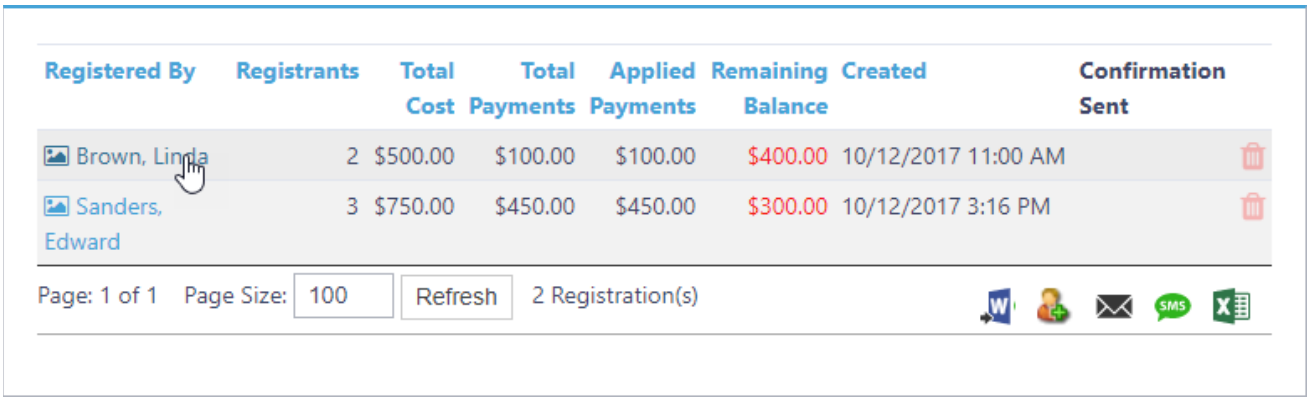
The following steps guide you through the process to manually add a payment for a Registration.

1. From the **Tags** menu, click the **Event Tags** option and then click on an ***Event*** link.

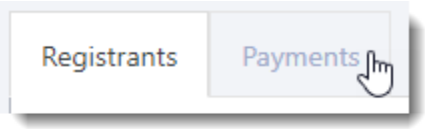


2. Select the **Registrations** tab.

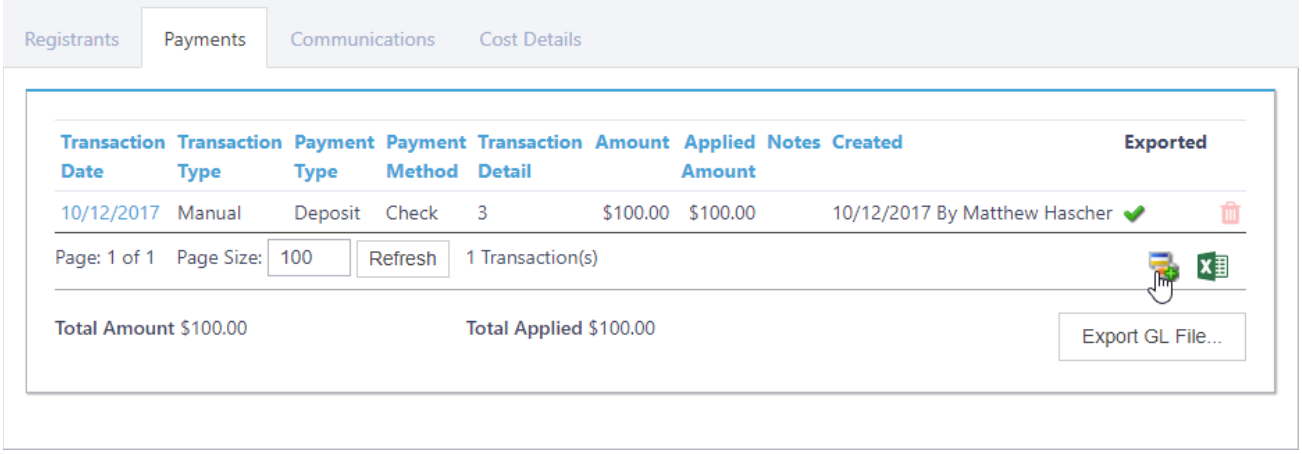
3. Click the ***Name*** link for the registration that you want to process a manual payment.



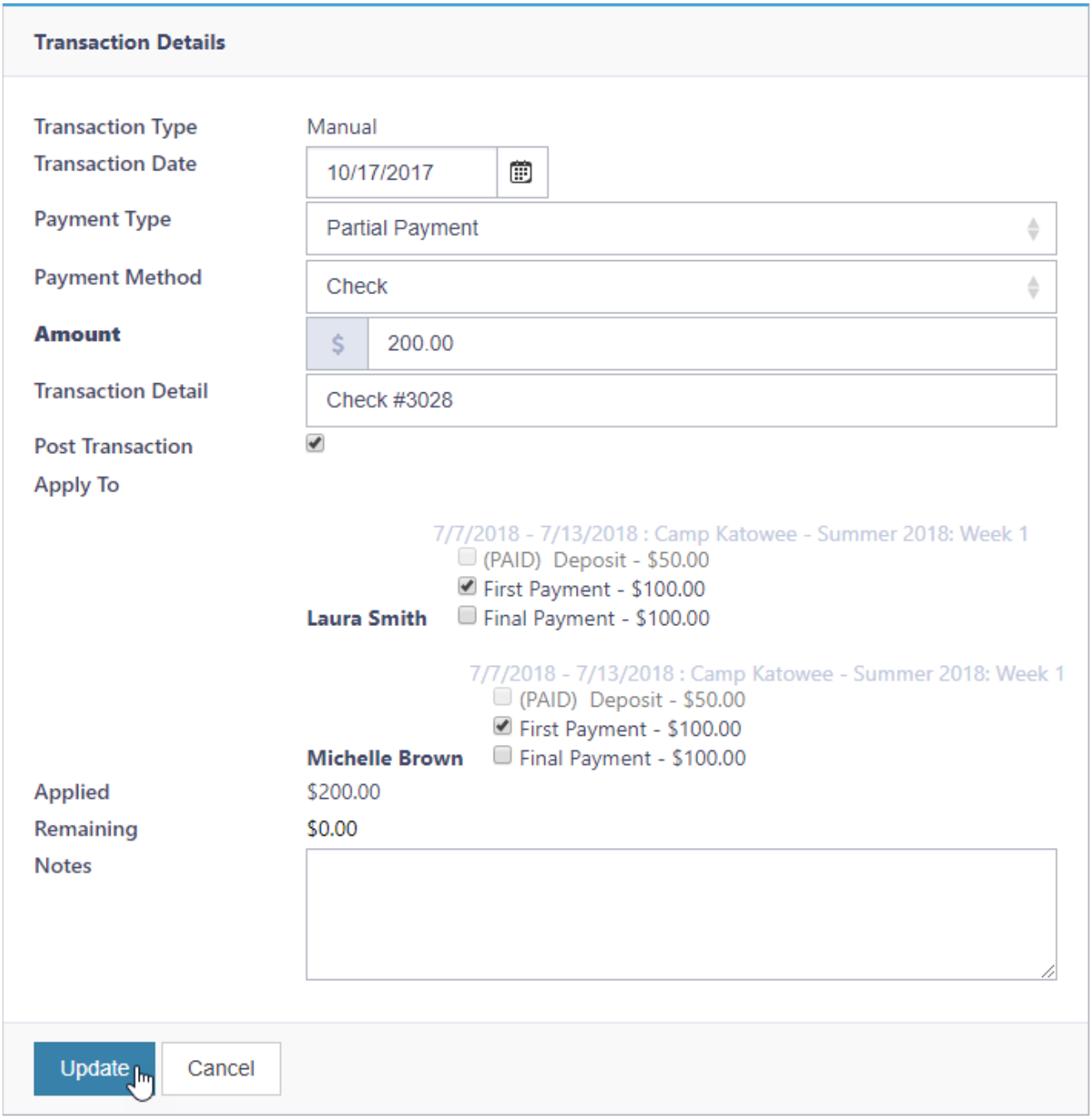
4. Select the **Payments** tab.



5. Click the **Add New Transaction** icon.



6. The **Transaction Details** page appears. Enter the appropriate payment information and then click the **Update** button.



Apply a Refund

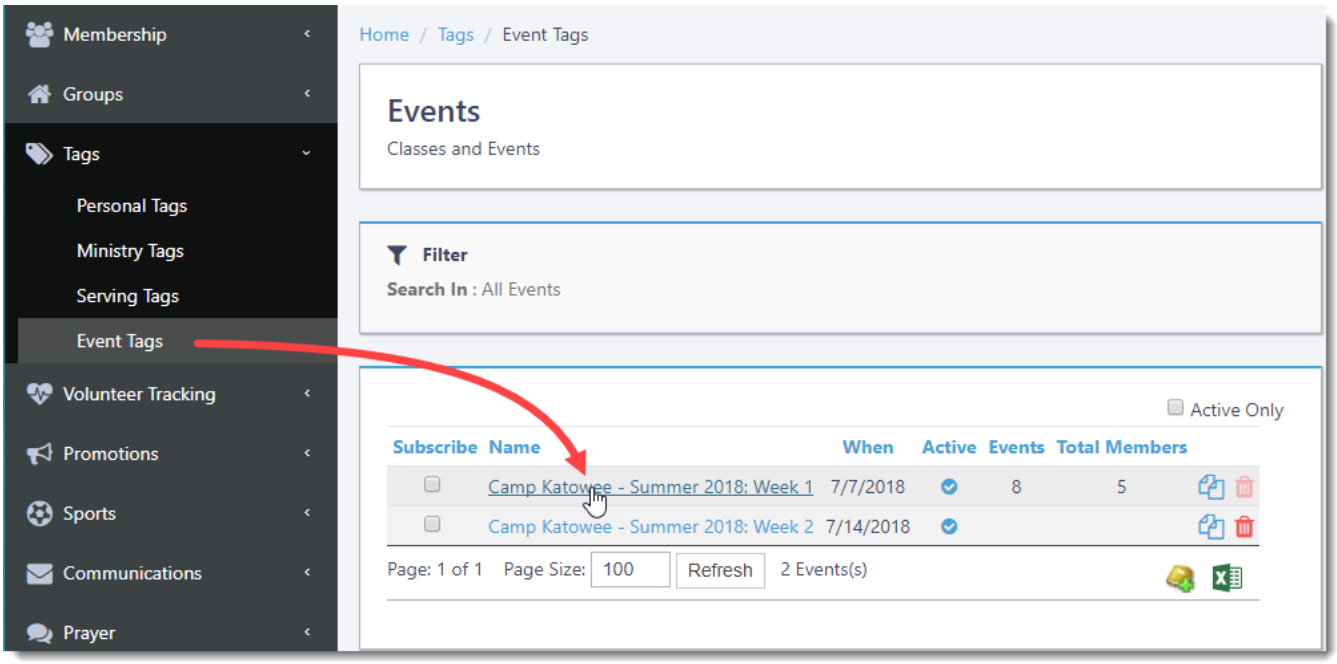
Before covering the steps to process, let's cover some basics:

- You can apply refunds to full cost payments, not additional costs, paid via a payment gateway processor, not manual.
- You can apply a refund to exported transactions.
- For manual refunds, delete the payment.

- You cannot delete Registrations with applied payments.
- You can process multiple refunds for the event cost.
- You can also create discounts to reflect partial refunds or credits.
- You cannot export refunds of transactions that have been exported but you can make a manual entry in Shelby v.5 General Ledger after processing the refund in Arena.

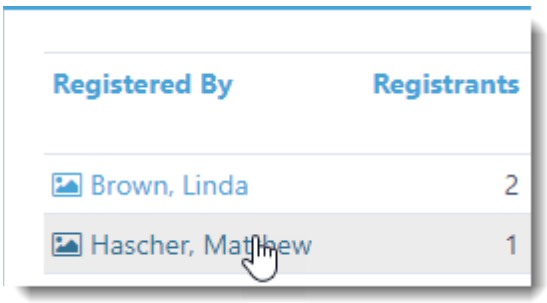
The following steps guide you through the process of applying a refund to a payment made through the Member Responsive portal.

1. From the **Tags** menu, click the **Event Tags** option and then click on an ***Event*** link.

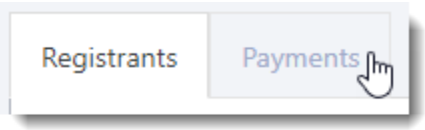


2. Click the **Registrations** tab.

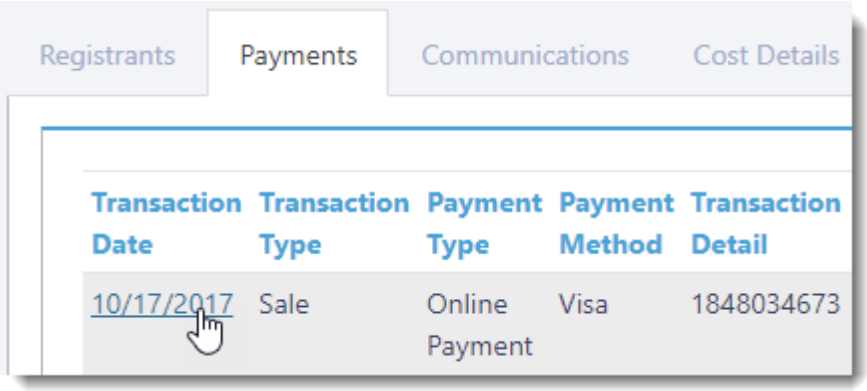
3. Click the ***Name*** link for the registration that you want to process a refund.



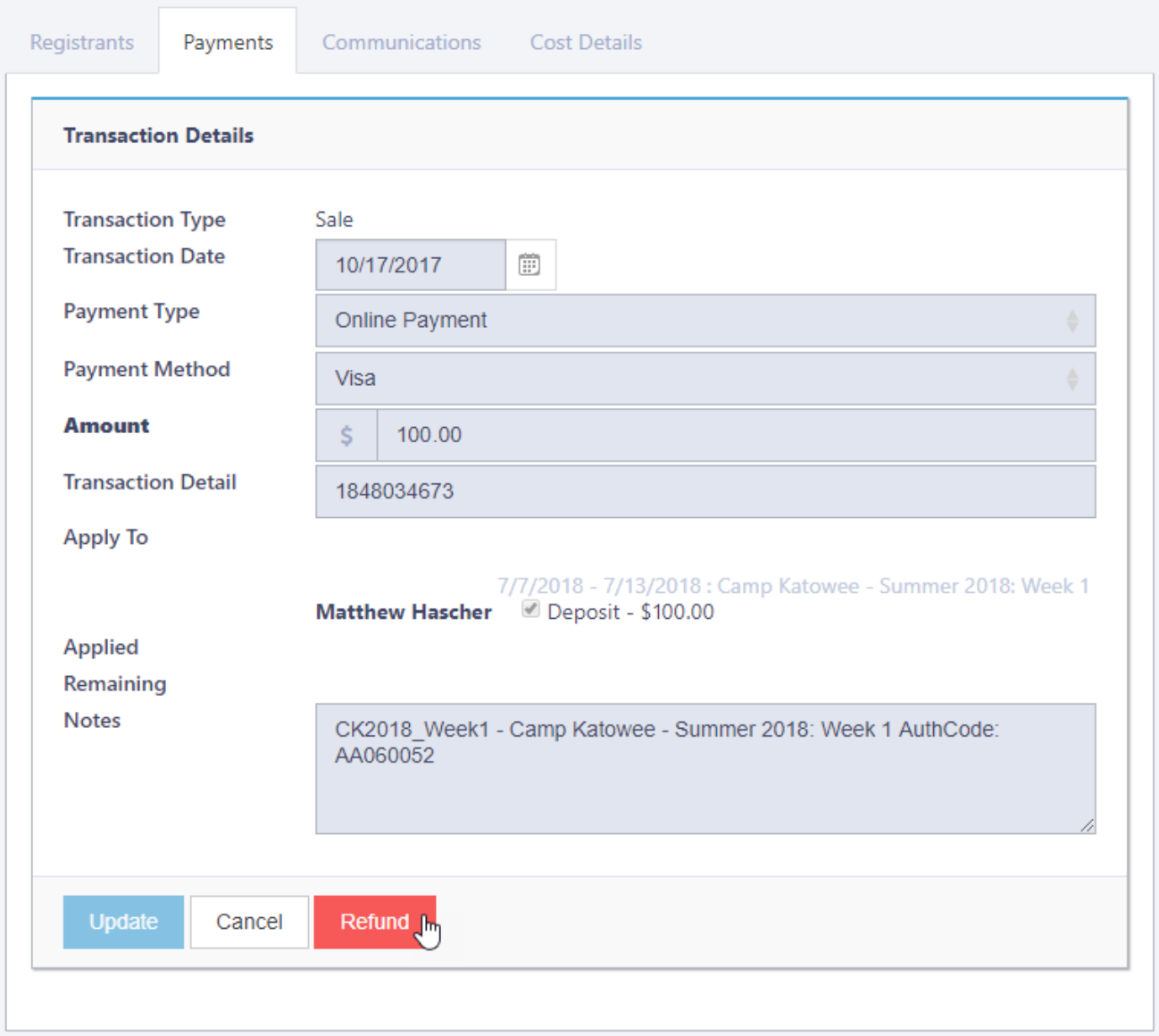
4. Select the **Payments** tab.



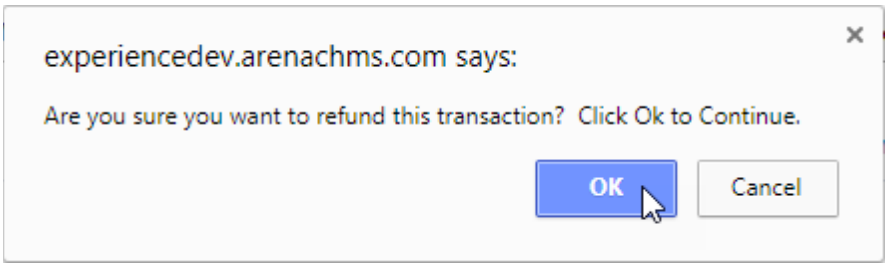
5. Click on the ***Transaction*** link that you would like to refund.



6. Click the **Refund** button.



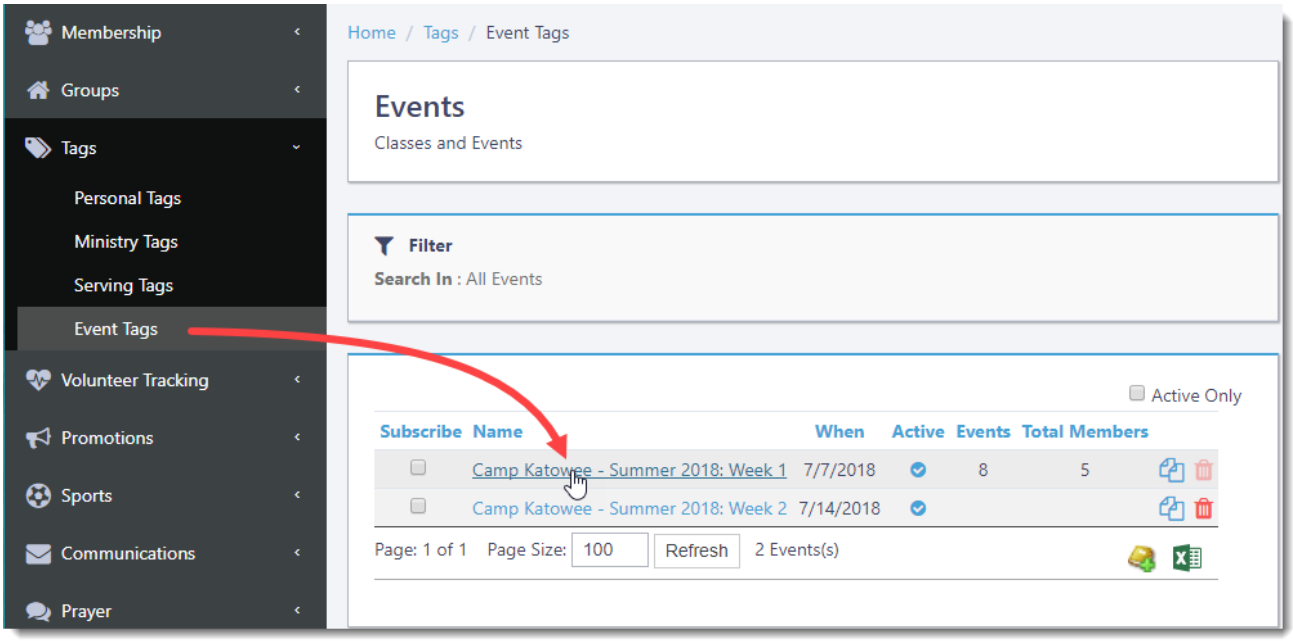
7. A confirmation message appears. Click the **OK** button to complete the refund.



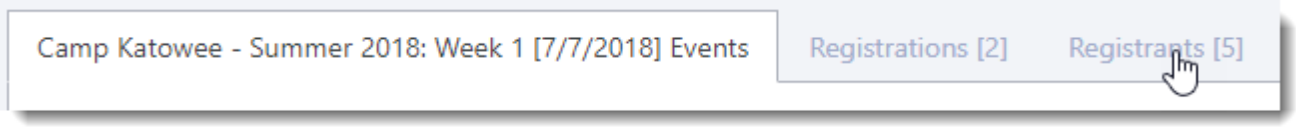
Assign a Registrant to a Sub-Event Tag

The following steps guide you through the process of assigning a registrant to a sub-event tag.

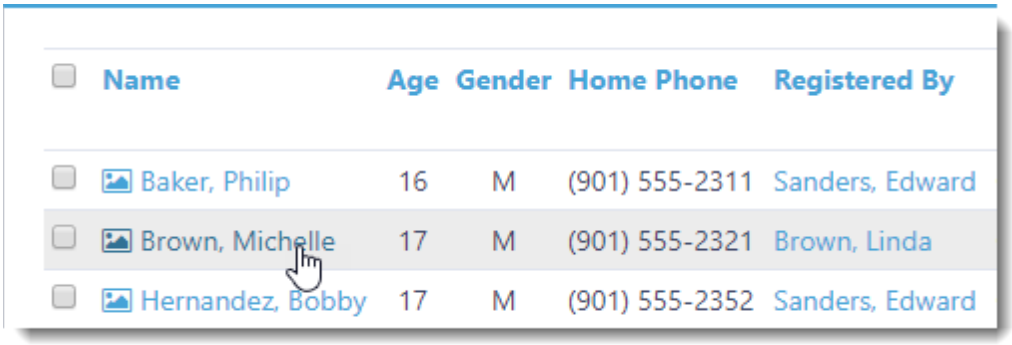
1. From the **Tags** menu, click the **Event Tags** option and then click on an ***Event*** link.



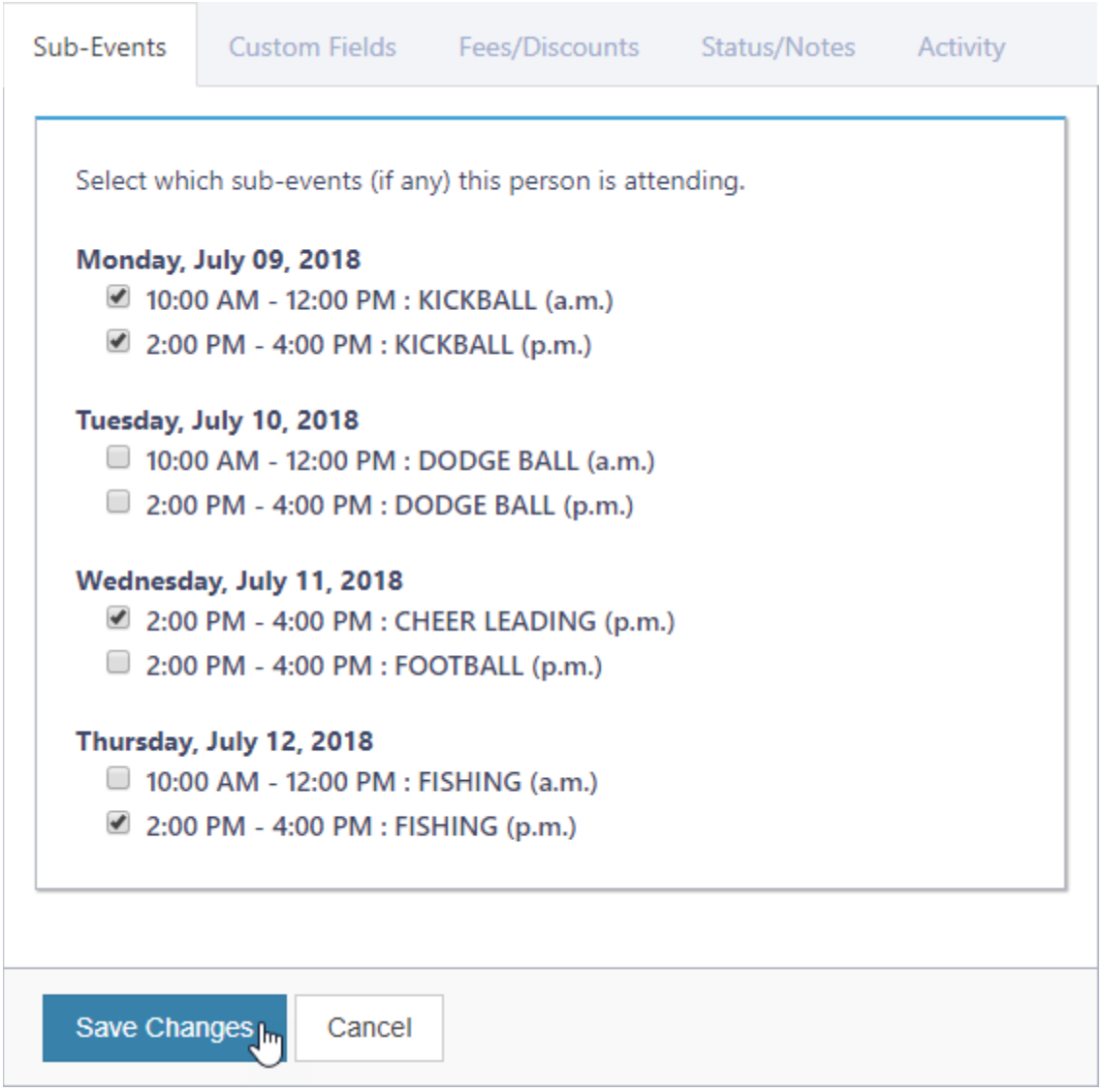
2. Select the **Registrants** tab.



3. Click the ***Name*** link for the registrant that you want to assign to sub-events.



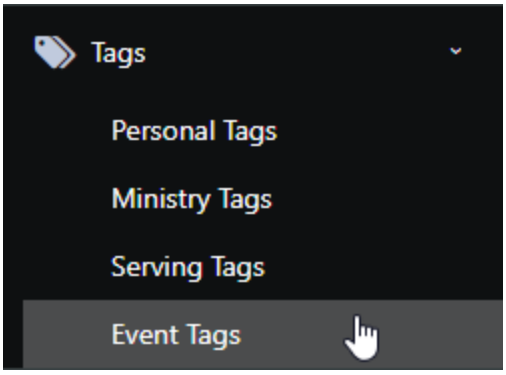
4. Assign the registrant to sub-events by checking the corresponding check boxes next to each appropriate sub-event. Click the **Save Changes** button when finished.



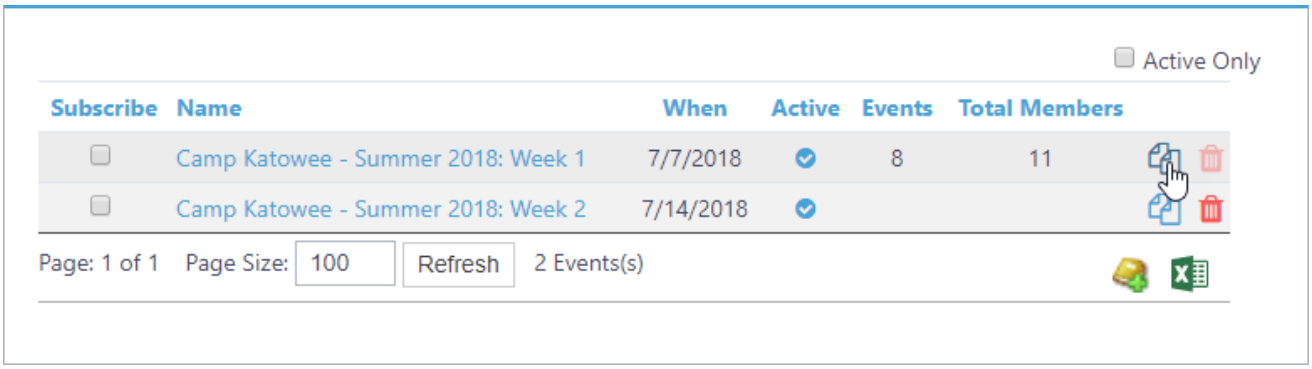
Copy a Tag

When you copy a tag, the Tag Details, Public Calendar Details and the Registration information is copied to a new tag with the word "(copy)" appended to the end of the tag name. The following steps guide you through the process of copying a tag.

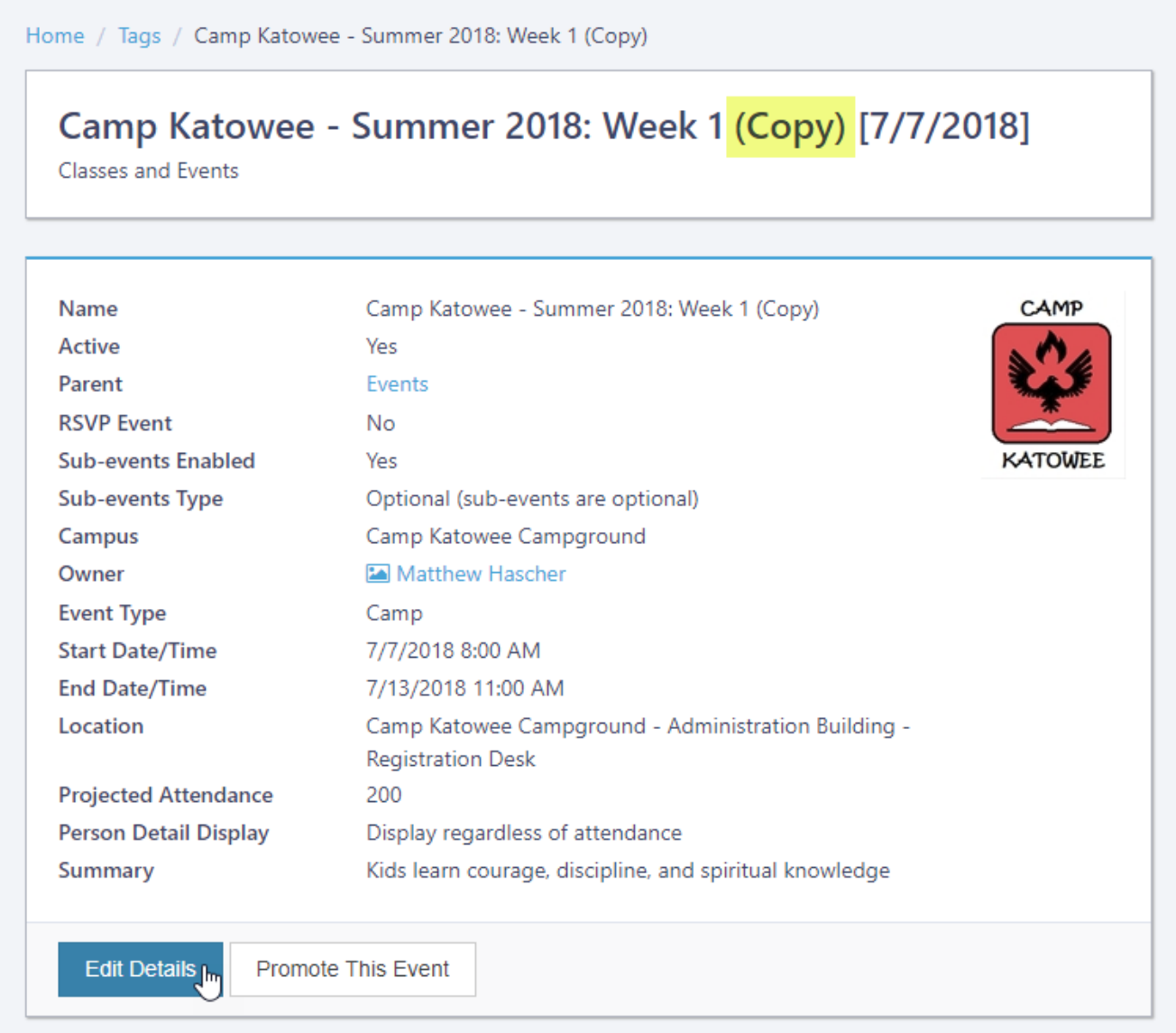
1. From the **Tags** menu, click the **Event Tags** option.



2. Click the **Copy Tag** icon next to the Event tag that you would like to copy.



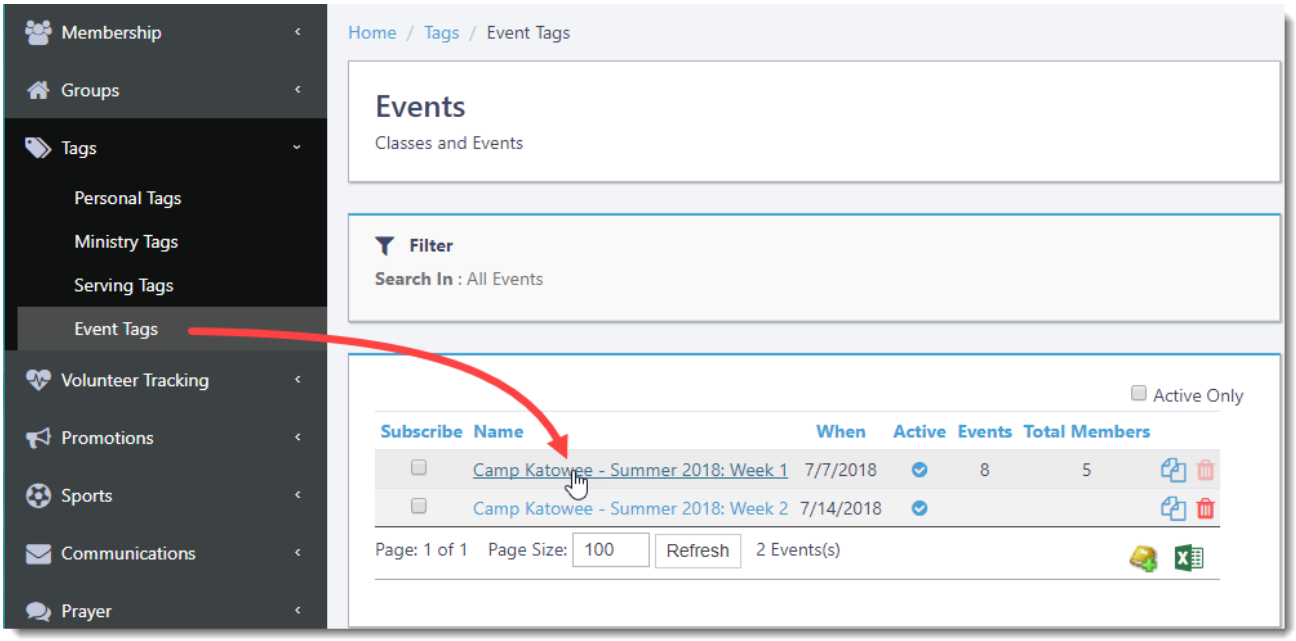
3. A copy of the Event Tag appears with the word "(copy)" added to the end of the name. From here, you can click the **Edit Details** and make any changes to the copied tag as appropriate.



Resend an Email Confirmation to a Registrant

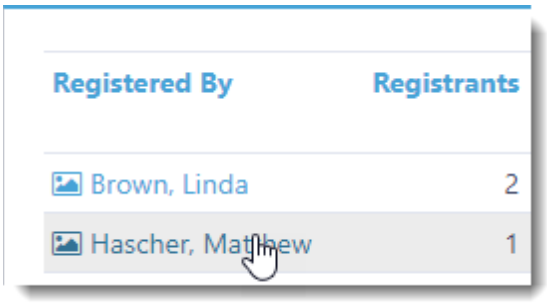
The following steps guide you through resending an email confirmation to a registrant.

1. From the **Tags** menu, click the **Event Tags** option and then click on an ***Event*** link.

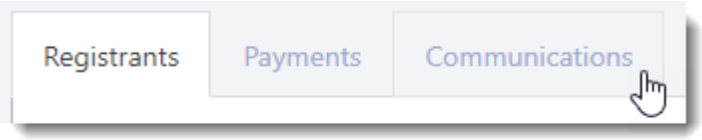


2. Click the **Registrations** tab.

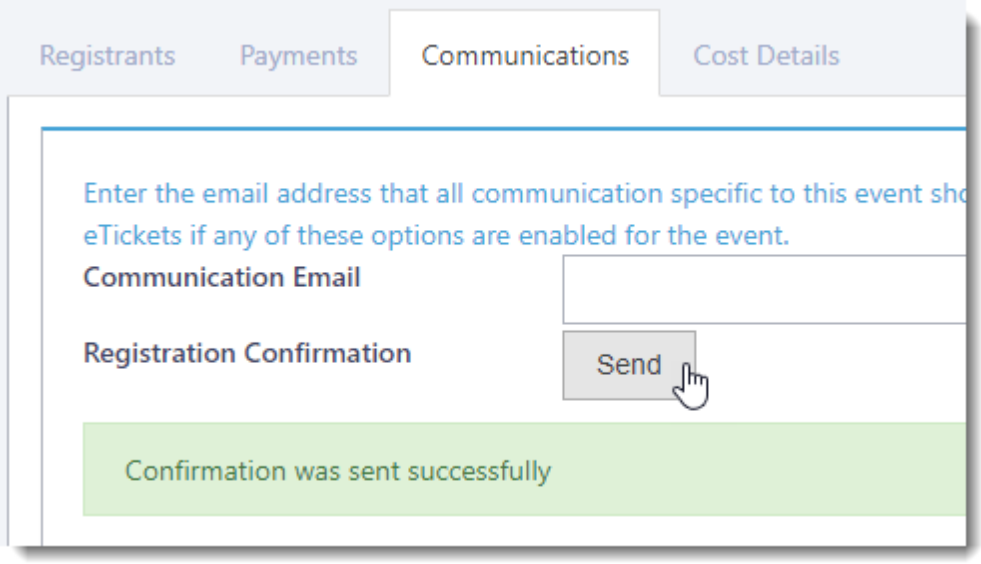
3. Click the ***Name*** link for the registration that you want to resend an email confirmation.



4. Select the **Communications** tab.



5. Click the **Send** button next to the **Registration Confirmation** label. When finished, a "Confirmation was sent successfully" message appears.

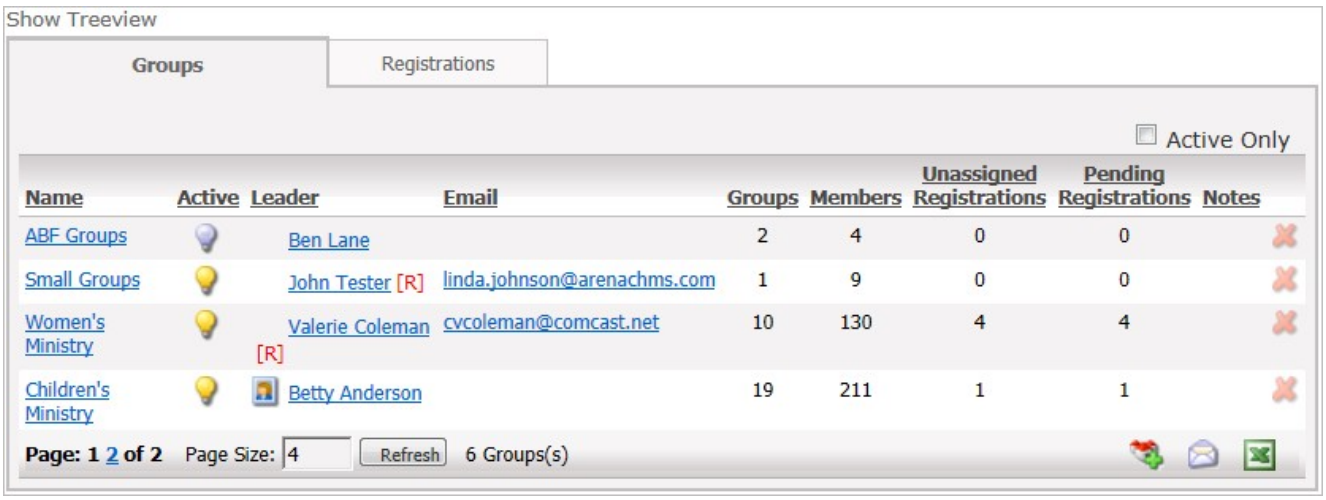

Registrants
Payments
Communications
Cost Details
Enter the email address that all communication specific to this event sho
eTickets if any of these options are enabled for the event.
Communication Email
Registration Confirmation
Send
Confirmation was sent successfully

Groups

The Groups section is where you can create and manage Groups. Group Categories separate all the various types of Groups, such as Small Groups and Sports. This is not to be confused with Group Types, which are specific per Group, but is a larger idea encompassing overall categorization of the Groups setup. Categories divide Groups by having unique Group Structure Trees, Group Roles, and field captions for Group Details, as covered later. Generally, a different tab on the Arena Navigation Bar represents each Category.

Below are suggestions to customize this feature for your organization:

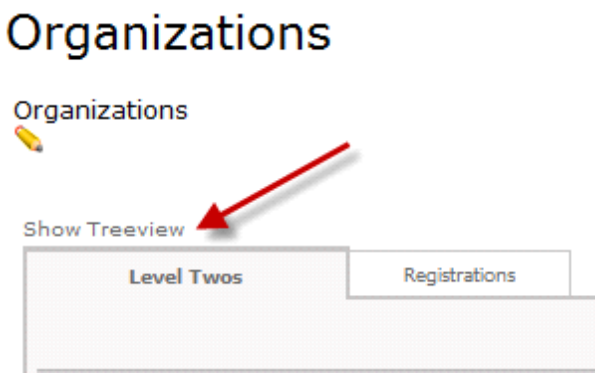
- After assessing ministries that will use Groups, customize or create Cluster Types as needed. Be sure to specify to allow registration, the level for unassigned registrants, levels to email registrant notifications and to allow occurrences or not.
- Customize the Small Group Tab Module on the Groups and Group Details pages.
- Customize the Small Group Role, Small Group Topic, Small Group Type, Age Range and Preference Lookups so that prospective group members can easily find a group that fits the person's interest on the **Locator** page of your Arena-managed website, and staff can apply requested preferences on the **Add Registration** page. Lookups apply to all Groups.
- Verify Attendance Type ID and Default Occurrence IDs on the Small Group Table Control module are valid.
- Set Default Max Members Organization Setting to the number of default members for all Groups, even though each Group can be adjusted by entering the desired Maximum Members. These values prevent the addition of members once the set number of members has be reached.
- Remove the check in the **Active Only** check box to view both active and inactive groups. Inactive Groups display with an **Inactive** icon.



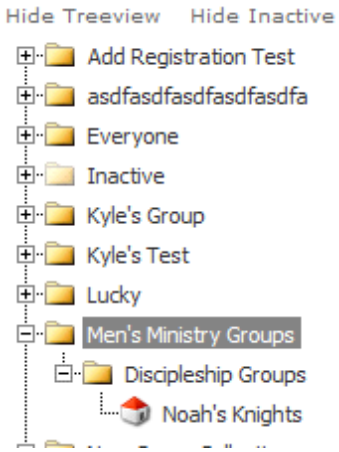
Group Trees

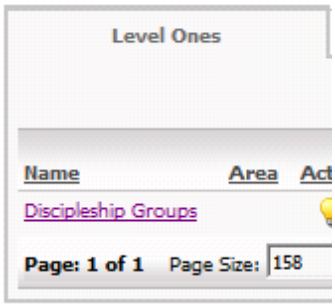
Group Trees are where Parent-Child relationships define levels. Clicking a level link displays the next level of group displaying child levels or groups of that level (depending on how many levels are in the Group Tree). As you select each level, the page shows the details for that level, the level name, active status, leader, administrator, URL, the parent level name, and type. It shows the same list as the top level for its child levels. The list also shows the active status, leader name, leader email, total number of groups in that tree, the total number of Members, the number of unassigned registrants, the number of pending registrants, and notes. There is also a **Registrations** tab, where you can view and assign Group Registrants. Click the ***Show Treeview*** link to display a tree view of the group. Click the **Expand** ⊞ icon to expand the tree.

Groups



Group Treeview

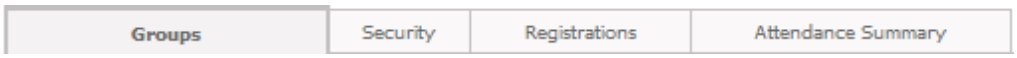




Throughout the Group Tree structure, you have the ability send to emails to any group role

throughout the group tree. (Arena default permissions are such that leaders and administrators have the same permissions.)

Three additional tabs display:

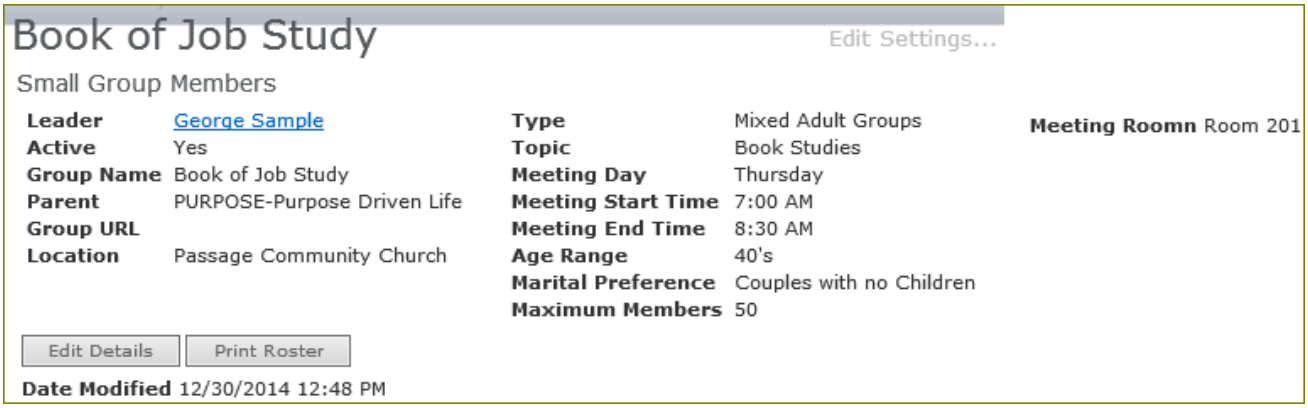


- **Security** – This tab displays security for the group. If you have security permissions, you can also make security permissions changes by Security Role or by person.
- **Registrations** – This tab displays unassigned and assigned Registrants.
- **Attendance Summary** – This tab displays an attendance for the Small Groups that are in this Group Tree below the current level.

Small Groups

The **Small Group** page displays all people in the group. From this page, you can email or SMS all or selected group members, change individual group member status to active or inactive, change the person's group role, print a roster for attendance, print a roster with contact information, view and edit group details, take and view attendance, and upload documents.

This page displays in two sections. The top section displays specific information for the group such as the name, leader, meeting location and other group specific details.

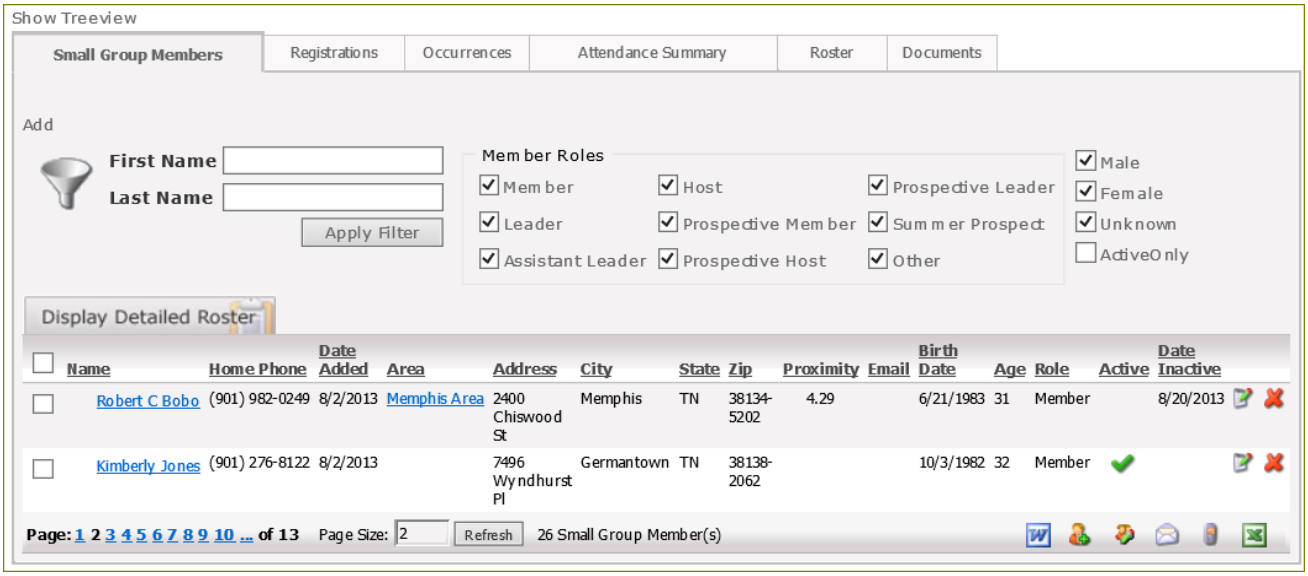


1. Click the **Edit Details** button to edit these details.

2. Click the **Print Roster** button to display a roster report for all active group members.

3. Click the ***Show Treeview*** link to display all groups in a folder tree format.

The bottom section displays several additional tabs. Available tabs can vary by user.



Small Group Members - The list of Group Members shows the member's name, home phone number, date added to the group, address, proximity (between them and the Location or Leader), Email address, Group Role, and Active Status. By clicking the **Edit** icon, you can change the Role of a group member, and change the active/inactive status. When you make a member inactive, the current date is applied. When you make a member active, Arena removes the date. See your Arena Administrator regarding Group Role options. Beyond the Leader, listed first, all records display in alphabetical order by last name.

- **Registrations** – This tab displays Pending Registrants. You can mark them as accepted or denied as Group Members, providing your Security role permits.
- **Occurrences** – This tab allows you to create and view occurrences for this group for

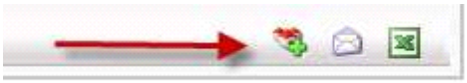
attendance tracking.

- **Attendance Summary** – This tab shows a quick summary of Attendance for this Group.
- **Roster** – This tab shows a directory style Roster of the Group Members.
- **Documents** – This tab gives you the ability to upload documents pertinent to this group.

Creating a New Group Tree

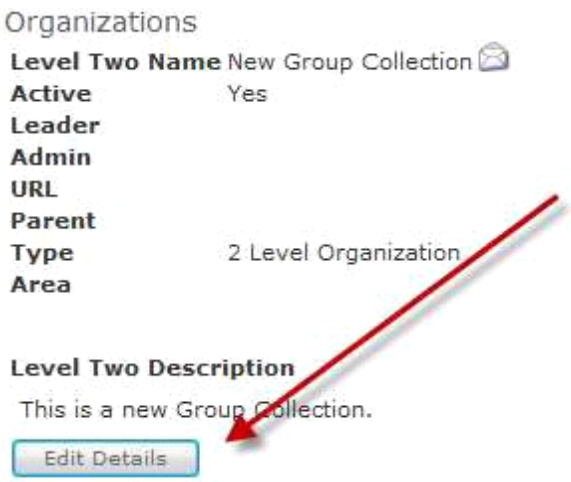
Creating a new Group Tree depends on Group Categories, Cluster Types, and Cluster Levels already setup by your Administrator. Once created, the process of creating Group Trees begins from the top of the **Group Trees** page. A three level cluster type is used in this example.

1. Click the ***Add*** link to create the first Group Tree. If there are any existing Trees, click the **Add New (Type)** icon. If there is no link or icon, but only a **Registrations** tab, there are no Cluster Types created.

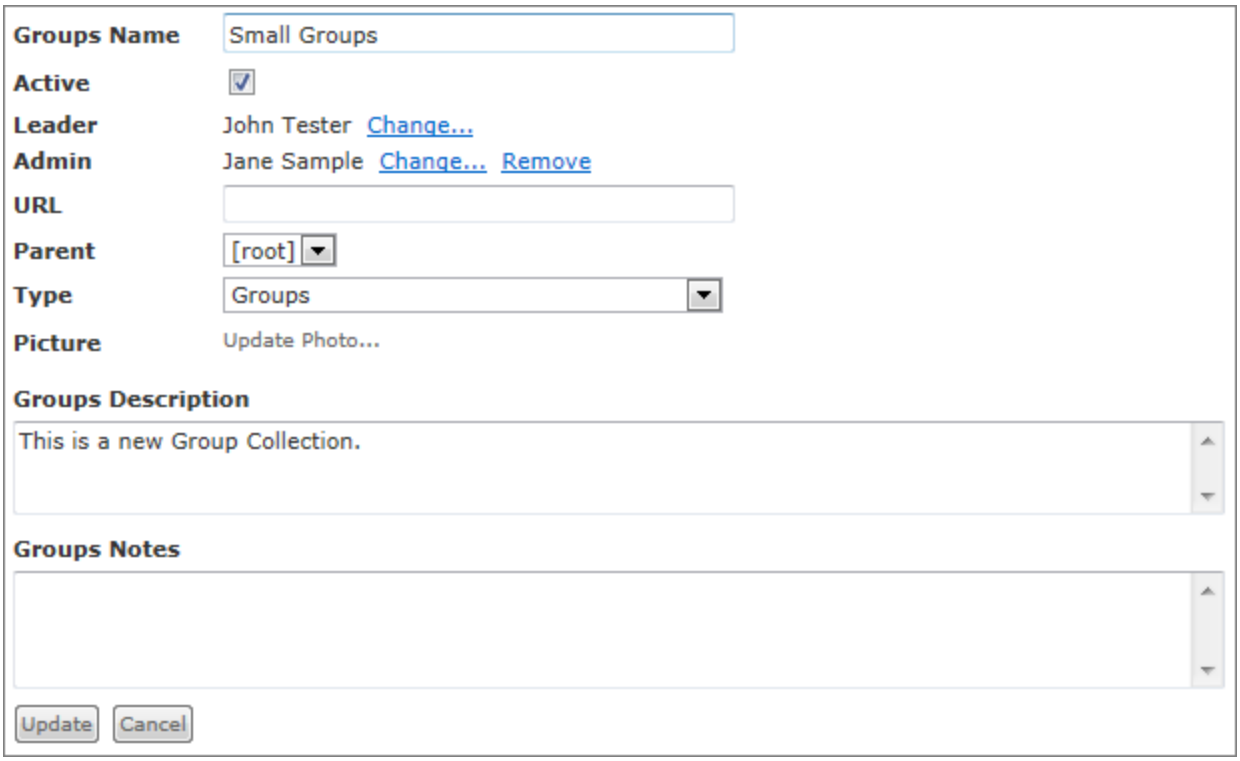


2. Click the ***New Group Collection*** link.

3. Click the **Edit Details** button on the next page to display the detail area of the New (Group Collection).



4. Complete all applicable fields for this cluster level.



- **Groups Name** – Enter the name for this level. A maximum of 100 characters is allowed.
- **Active** – Leave this box checked for active groups. Uncheck the box for groups that are seasonal. You then presented with a check box to "Mark all Child Groups and Clusters Inactive".
- **Leader** – Select an existing record for the Leader for the Cluster Type.
- **Administrator** – Select an existing record for the support admin for the Cluster Type.
- **URL** – Enter the website address for this level.
- **Parent** – This is the group parent for the current group. The parent of the first level is

always the Root. You can change a group cluster within the same Small Group Category.

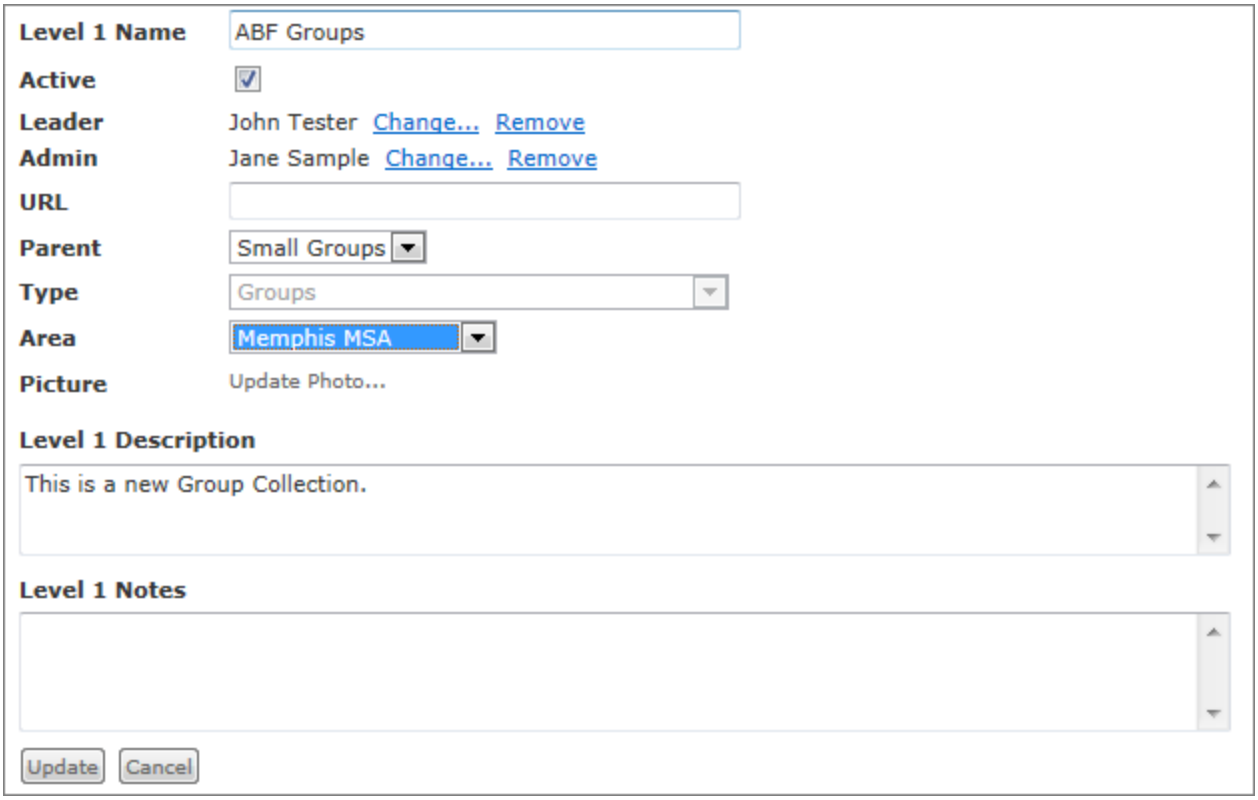
- **Type** – Select the Cluster Type for this group structure. The Type determines how many levels this group can have before you can create classes. If you are familiar with Shelby Systems software, you already know about Levels in relation to Organizations. Also, enter in a description and any notes you wish to place on the Group.
- **Picture** – Click the ***Update Photo*** link to locate and upload a picture for the cluster type.
- **<Name> Description** – Enter a description for the group tree. Maximum of 5,000 characters.
- **<Name> Notes** – Enter notes for the group tree. A maximum of 2,000 characters is allowed.

5. Click the **Update** button.

6. Click the ***Add*** link to add a second level to this group. The Type in the previous step determined the number of levels for the group tree.

7. Click the ***New Group Collection*** link.

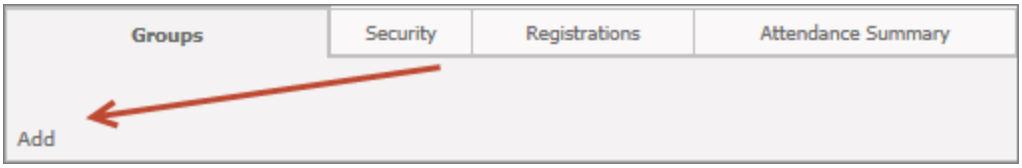
8. Click the **Edit Details** button and complete the information for this second Group level.



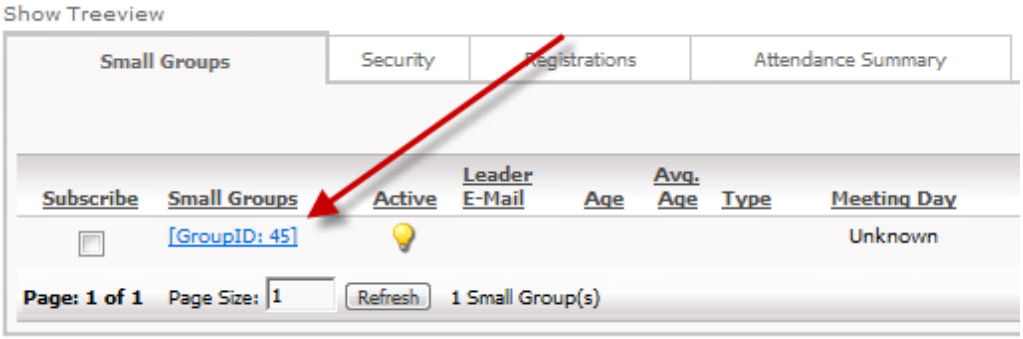
- **Level 1 Name** – Enter the name for this level of the group tree.
- **Active** – Leave this box checked for new active groups.
- **Leader** – Select an existing record for the Leader for the Cluster Type.
- **Administrator** – Select an existing record for the group level leader.
- **URL** – Enter the website address for this level.
- **Parent** – This is the group parent for the current group. The parent of the first level is always the Root.
- **Type** – The associated Cluster Type, selected in the previous step, displays in this field.
- **Area** – If available, select the area associated with the group level.
- **Level 1 Description** – Enter a description for the group tree.
- **Level 1 Notes** – Enter notes for the group tree.

9. Click the **Update** button.

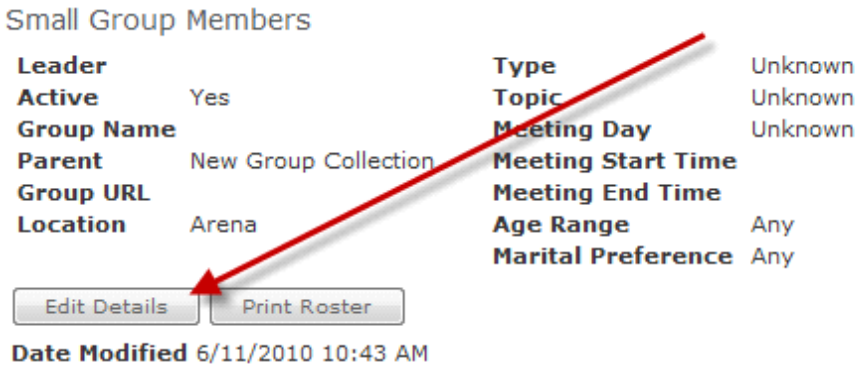
10. Click the ***Add*** link.



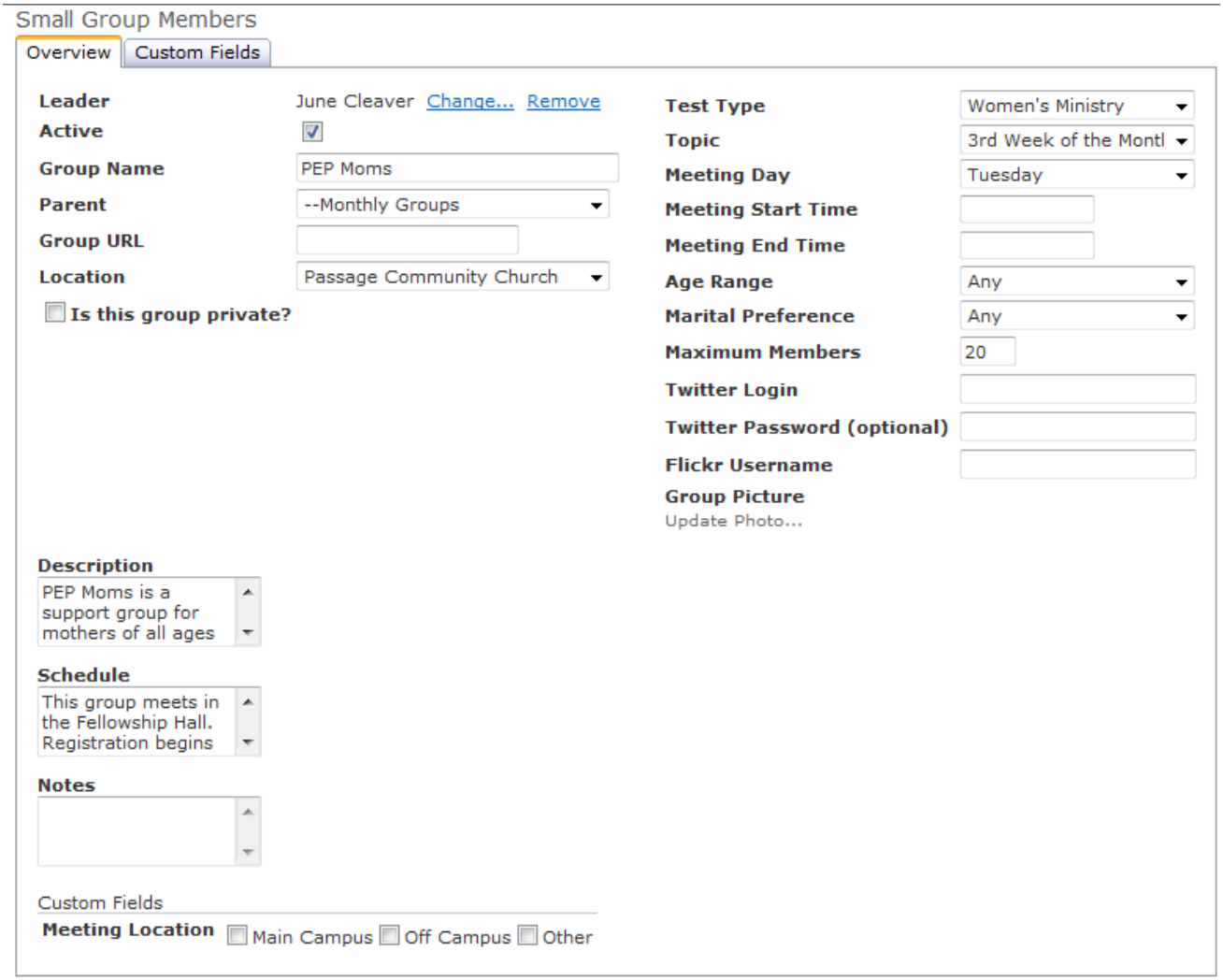
11. Click the ***Small Group*** link.



12. Click the **Edit Details** button.



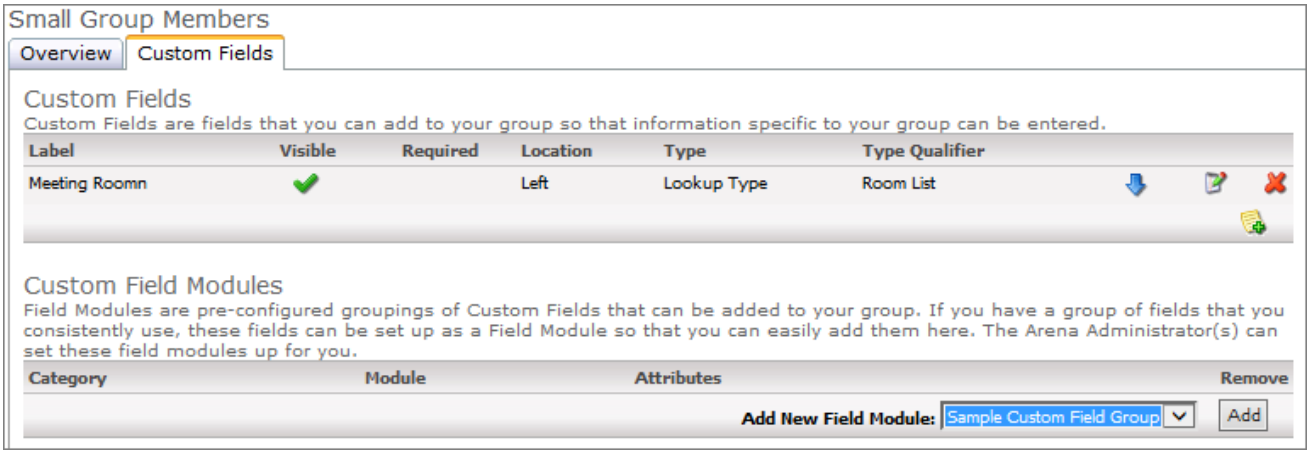
13. Complete the details for this specific group.



- **Leader** – This field displays the name of the group leader. Click the ***Name*** link to display the **Person Detail** page.
- **Active** – Select this check box if the group is active.
- **Group Name** – Enter a name for this group.
- **Parent** – This is the parent group in this group tree.
- **Group URL** – This is the URL for this specific group, if applicable.
- **Location** – This is where the group meets.
- **Is this group private** – Select this check box to prevent this group from being available on your Arena-managed website.
- **Description** – Enter a description, as desired, for this group that provides website users a description for this for this group.
- **Schedule** – Enter schedule information for this group.
- **Notes** – Enter additional notes, as desired.

- **Type** – Select the type for this group.
- **Topic** – Select the topic for this group.
- **Meeting Day, Start and End Time** – Select and enter day and time when this group meets.
- **Age Range** – Select the age range for this group.
- **Marital Preference** – Select the martial preference for this group.
- **Maximum Members** – Enter the maximum number of members for this group. This number limits the number of people in this group with a Member status. Once this group has the entered maximum, it is no longer be available on your Arena-managed website for registrants. The default is 20. You can always manually add members directly to a group from the members tab for this group, exceeding the maximum member value.
- **Twitter Login and Password** – Enter the Twitter account information for this group, if applicable.
- **Flickr Username** – Enter the Flickr user name for this group, if applicable.
- **Group Picture** – Upload a group picture, if desired.
- **Custom Fields** – If you create Group Custom Fields, they display on the **Group Overview** page.
- **Date Modified** – Arena adds a "time and date stamp" when you make changes to the Group Overview or Custom Fields.

14. Complete **Group Custom Fields**, if applicable. You can use Group Custom Fields to record such information as a meeting room drop-down or other group specific information.



Field Types:

- **Address** – places Street, City, State, and Zip fields on the form.
- **Area** – places a list of existing areas on the form in a drop down list format.

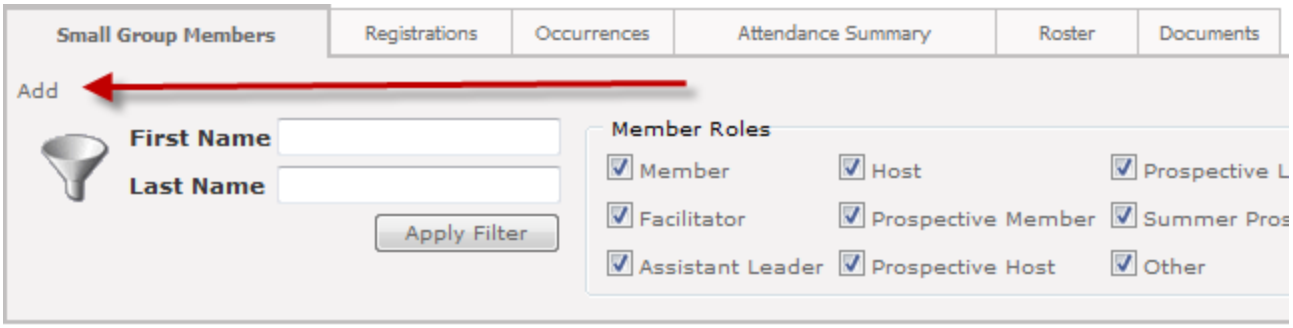
- **Check Box** – places a check box for each value added in the Value field. Enter the values separated by commas. You can select any or all of the available options.
- **Custom Query** – allows a custom query.
- **Date** – places a date field with a **Calendar** icon.
- **Document** – allows the user to attach a document.
- **Drop-down List** – places a drop-down list populated with each value added in the Value field.
- **Image** – this allows users to upload an image.
- **Lookup Type** – allows you to select from a list of Lookup fields.
- **Person** – allows you to select an existing record.
- **Phone Number** – allows you to enter a telephone number.
- **Radio List** – places a radio button for each value added in the Value field. Users can select only one option.
- **Rich Text Field**- allows users to enter rich text.
- **Static HTML Content** – allows user to enter HTML content.
- **Static HTML Content** – any text placed in the Value field is included as static text.
- **Textbox** – places a text box on the form. The text box allows 255 characters.

15. Click the **Update** button to save.

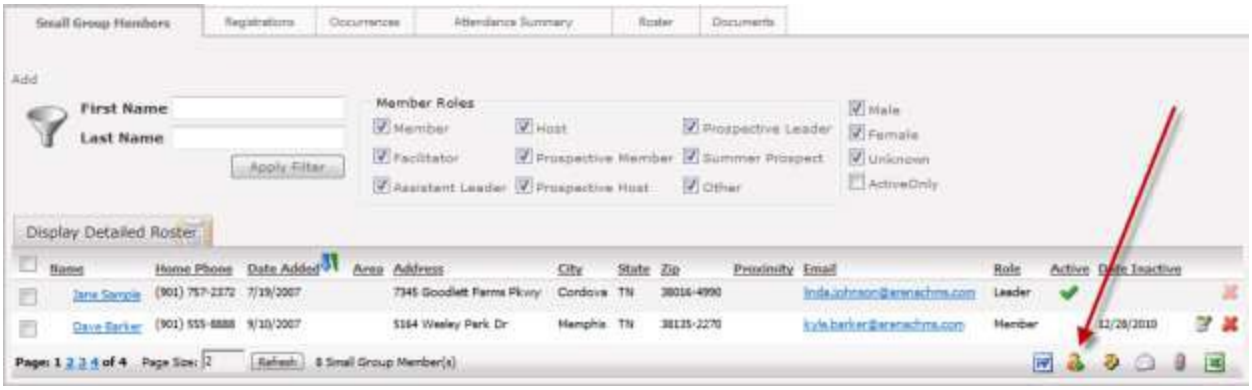
Add Group Members

1. From the **Small Groups Member** tab, you can manually add a group member.
2. Go to the **Small Group Members** tab.
3. Click the ***Add*** link if this is the first member of the group or click the **Add New Small Group Member** icon in the lower right corner of the **Members** tab if this is not the first member.

First Group Member



Adding Subsequent Members



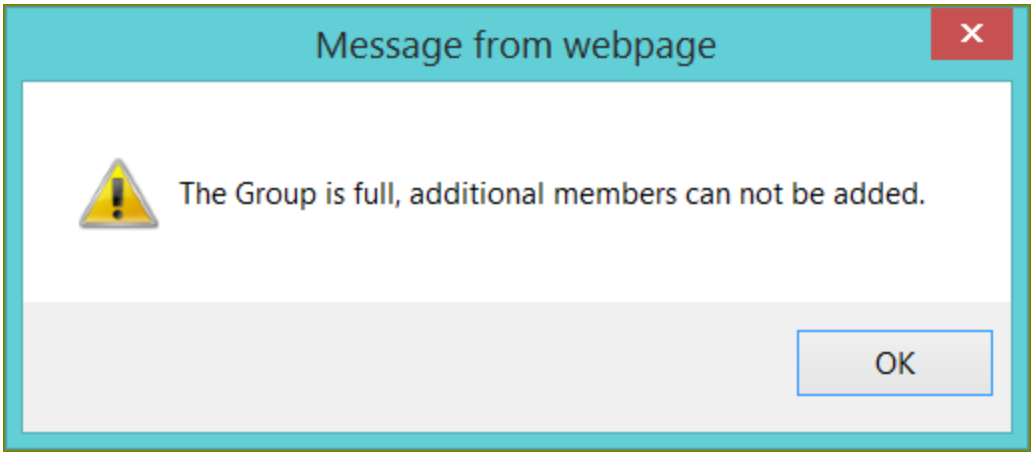
Use the pop-up search window to search and select record(s).

1. Click the **Edit** icon to select Group Role for the new member.

2. Click the **Save** icon to save.

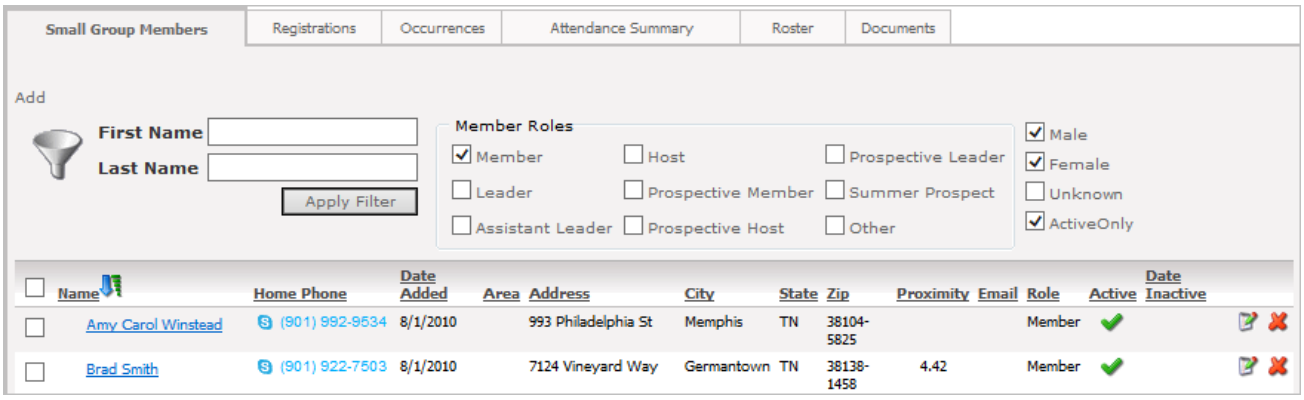
Name	Home Phone	Date Added	Area	Address	City	State	Zip	Proximity	Email	Birth Date	Age	Role	Active	Date Inactive
George Sample	(901) 757-2372	8/1/2013	Memphis Area	1740 Meadow River Cv	Cordova	TN	38016-1603	2.36		6/14/1990	24	Leader	✔	
Lee Arnoult	(901) 308-0103	10/14/2013	Memphis Area	6964 Forbury Cv	Memphis	TN	38119-8506	7.35	leearnoult@bellsouth.net	3/27/1941	73	Member	✔	
Robert C Bobo	(901) 982-0249	8/2/2013	Memphis Area	2400 Chiswood St	Memphis	TN	38134-5202	4.29		6/21/1983	31	Member		8/20/2013
Kimberly Jones	(901) 276-8122	8/2/2013		7496 Wyndhurst Pl	Germantown	TN	38138-2062			10/3/1982	32	Member	✔	
Michael Korzekwa	555-6987	8/2/2013		6869 Stevenwoods Ave	Memphis	TN	38141-0587		gloriaandmike@gmail.com	7/22/1983	31	Member	✔	

Once the group reaches the maximum number of members, the below pop-up displays when attempting to add additional members. The Default Max Members Organization setting determines the default number of members for all groups yet, each group can be adjusted using the Maximum Members field in Group Details.



Using the Group Filters and Sorting Options

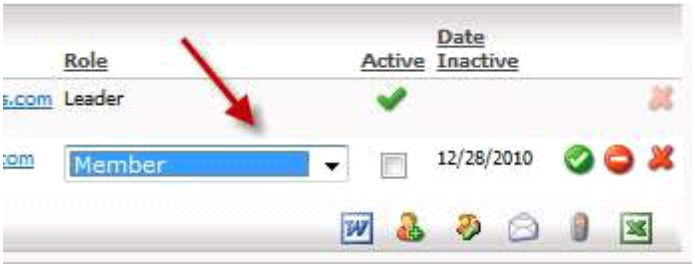
Use the first and last name boxes to enter a full or partial name of a group member. You can filter by group role and active group status. You can also perform a single sort (sorting by a single column) by clicking the column header. For example, click the **Name** column header to sort by first name. The default view is by first initial of the last name. To restore to default view, click the **Active** column header.



Edit a Group Member

1. Click the **Edit** icon on the right to edit the Role or make a member active or inactive.

2. Click the **Update** icon. When you make a group member inactive, Arena records the date.

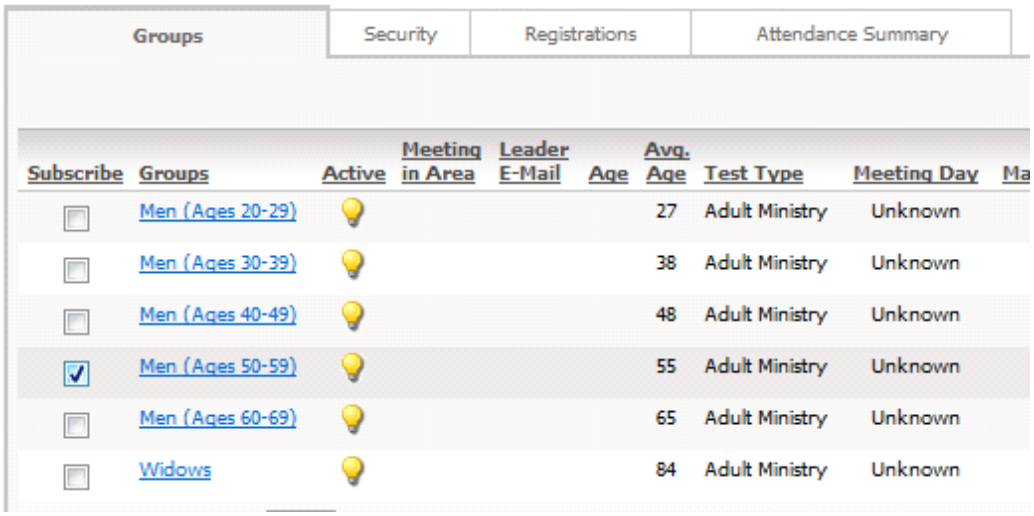


Subscribe to a Group

Subscribing to a Group adds a link to the right-navigation bar of Arena's home page. The link also displays two numbers. The first number represents group members. The second number represents registrants. You can subscribe to any group you can view. You can navigate down through the tree until the list of small groups display. At this level, you can subscribe to any Group. Select the **Subscribe** check box to the left of the group you want to subscribe.

1. Go to lowest level in the group tree.

2. Select the **Subscribe** check box of the group you want to subscribe.



3. Return to Arena's home page to verify the subscription link.

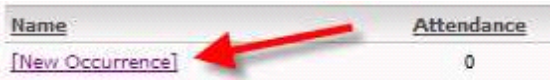
Create a New Occurrence

An Occurrence is a record of a meeting date.

1. To view and create new Occurrences, click the **Occurrences** tab on the **Small Group** page.

2. Click the **Add New Occurrence** icon. This creates a new single Occurrence, called **New Occurrence**.

3. Click the ***New Occurrence*** link to view the occurrence.



4. Click the **Edit Details** button to customize the Occurrence.

5. Complete the fields for this Occurrence, as desired.

Allows an attendance occurrence to be modified

Attendance Type	Sunday School - Young Adult Singles
Name	Sunday Study
Location	Main Campus-Fellowship Hall-Room 101A
Area	
Start Date	6/6/2010 Time: 08:00 AM
End Date	6/6/2010 Time: 09:30 AM
Check-In Location	Campus 1Fellowship Hall - Some Room
Check-In Start	06/06/2010 Time: 07:45 AM
Check-In End	06/06/2010 Time: 09:15 AM
Membership Required for Check-In	☐
Occurrence Closed	☐
Head Count	0

Notes

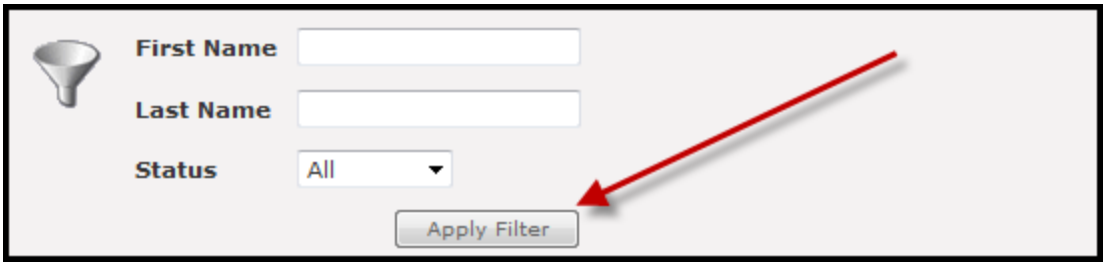
Update Cancel

- **Attendance Type** -This allows you to associate this Occurrence with an existing Attendance Type, created in Check-In.
- **Name** – This is the name of the Occurrence.
- **Location** – This is where the Occurrence takes place.
- **Frequency** - Allows you to select weekly or every other week.
- **Area** - Allows you to associate the Occurrence with an Area, created in Groups.
- **Start/End Dates** - Allows you to enter the dates and times of the Occurrence.
- **Check-In Location** - You can select a Location, created in Check-In.
- **Check-In Start/End** - Allows you to enter the date and time this occurrence should be available, if using Check-In.
- **Membership Required for Check-In** - Check if you wish for only members who are already a part of the Group or Tag to check in. Checking this option overrides the age criteria associated with the Attendance Type to be able to check in. If creating manual occurrences, be sure the Occurrence is set for Membership Required in order for only people in the Tag or Group to be available.
- **Occurrence Closed** - Select if you want to close this Occurrence, not allowing anyone to check in.

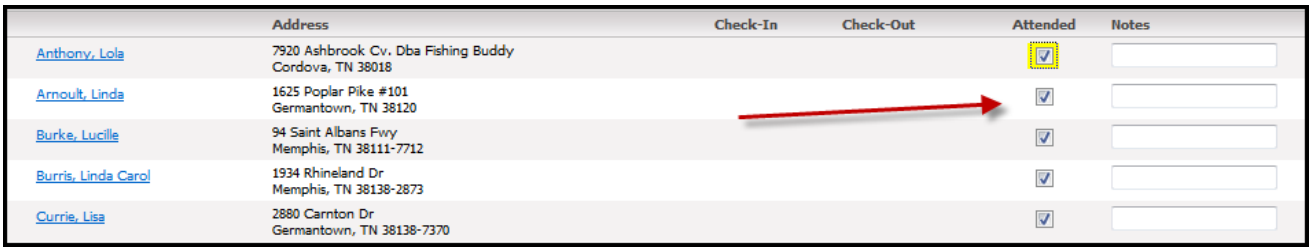
- **Head Count** - Allows you to enter in a head count for this Occurrence.

6. Click the **Update** button to save and close the window.

7. Click the **Apply Filter** button. Arena displays all active group records.



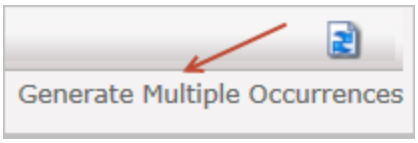
8. Mark attendance, as desired. All active records in the group display.



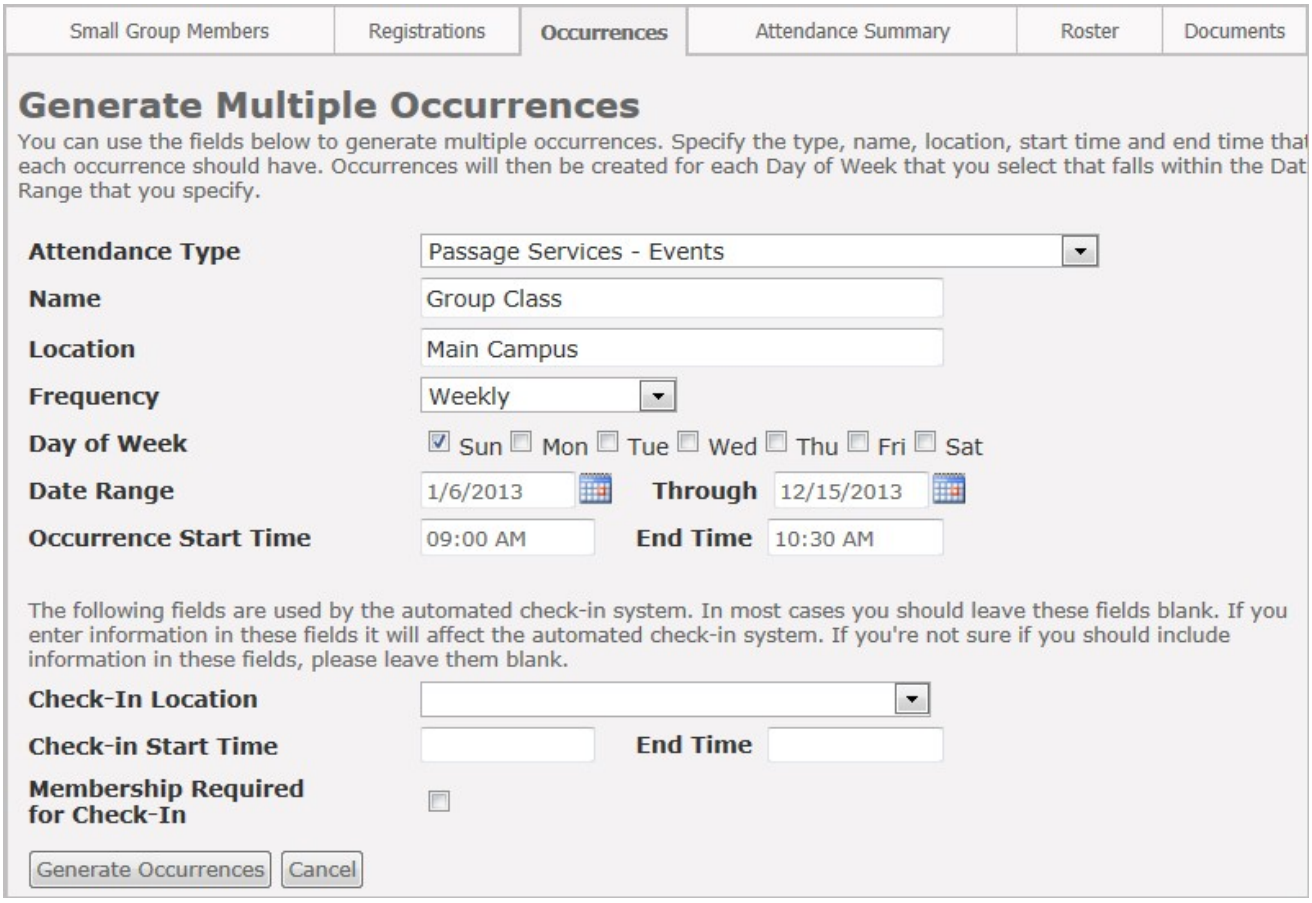
Create Multiple Occurrences

1. Go to the **Groups** page.

2. Click the ***Generate Multiple Occurrences*** link.



3. Complete all applicable fields.



- **Attendance Type** – Select an Attendance Type created in Check-In.
- **Name** – Enter a name for the occurrence. This field is required.
- **Location** – Enter a location.
- **Frequency** – Select a frequency. Options are weekly and bi-weekly.
- **Day of Week** – Select day(s) of the week.
- **Date Range** – Enter a date range.
- **Occurrence Start Time** – Enter the start and end dates for the occurrences.
- **Check-In Location** – Select a Check-in Location.
- **Check-in Start/End Time** – Enter the check-in start and end times.
- **Membership Required for Check-In** – Check this box if you want to allow only Members of this Group or Tag to check-in. Checking this option overrides the age criteria.

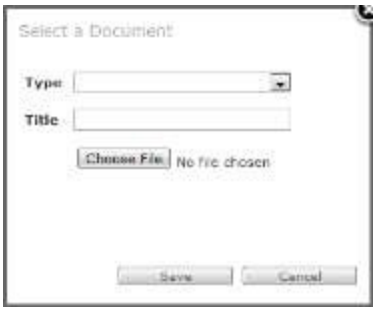
4. Click the **Generate Occurrences** button.

Adding a Document to a Group or Tag

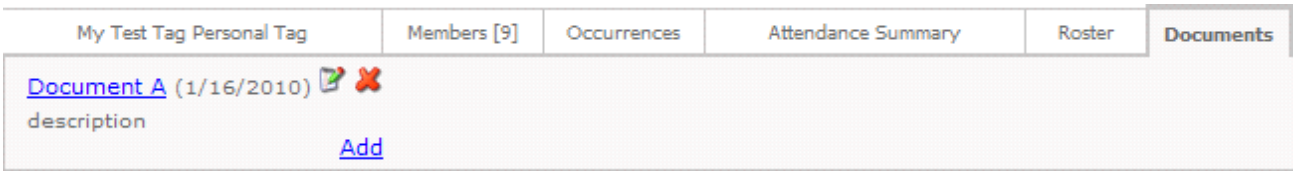
Use the **Documents** tab to upload documents to a specific group or tag such as an e-study guide or book for the group, or forms for a Serving Tag.

1. Click the **Documents** tab for a Group or Tag.
2. Select the ***Add*** link to display the Document Selection dialog box.

3. Select a **Document Type** from the Type drop-down.
4. Enter a document name in the **Title** field.
5. Click the **Choose File** button to locate and upload the document. If using an HTML5-compliant browser, you can drag-n-drop the file to the Document Selection dialog box.



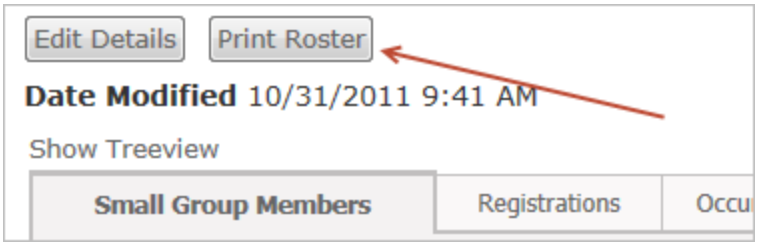
6. Click the **Save** button. The Document Type displays as a link if **Use Type as Title** is checked, otherwise the file name shows as the link. The attachment date for the document displays next to the Type. The Title set in the Document Browser shows beneath the link. Click the **Edit** icon to change the attached document, or the **Delete** icon to remove the document. Click the ***Add*** link to add more documents.



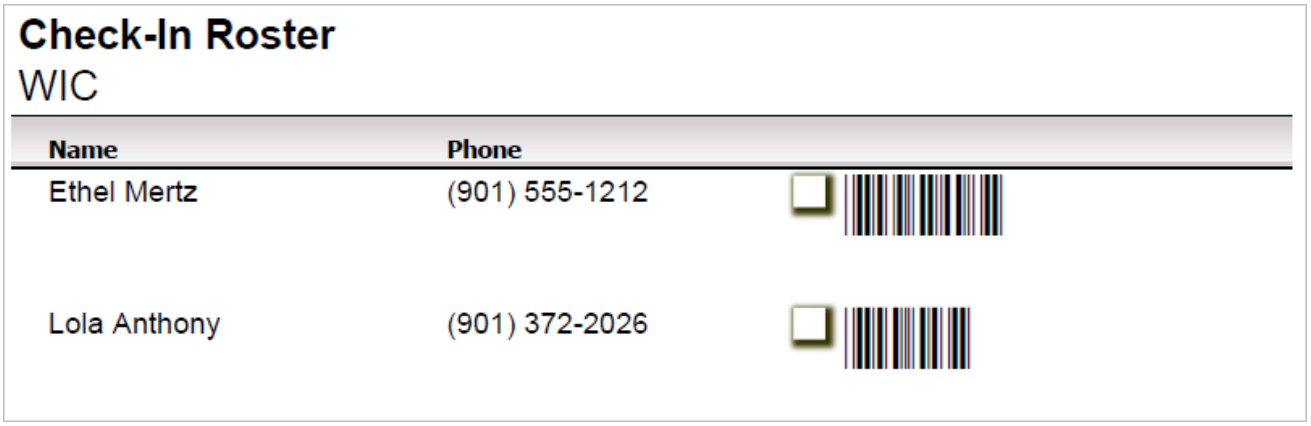
Print a Roster for Attendance

1. Go to the Group.

2. Click the **Print Roster** button.



3. Print or save the document.

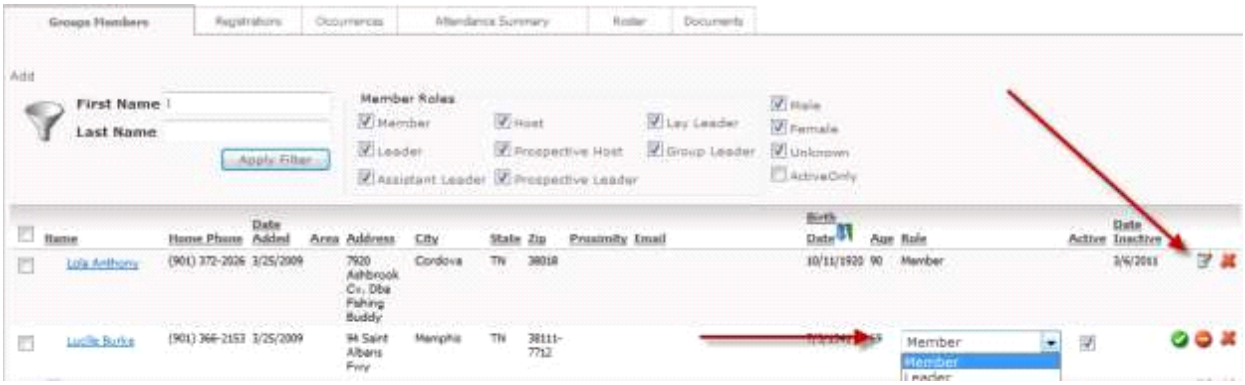


Change Group Role or Status

1. Go the **Group**.

2. Click the **Edit** icon.

3. Make changes. Arena adds the current date when you make someone inactive in the group.



4. Click the **Update** icon.

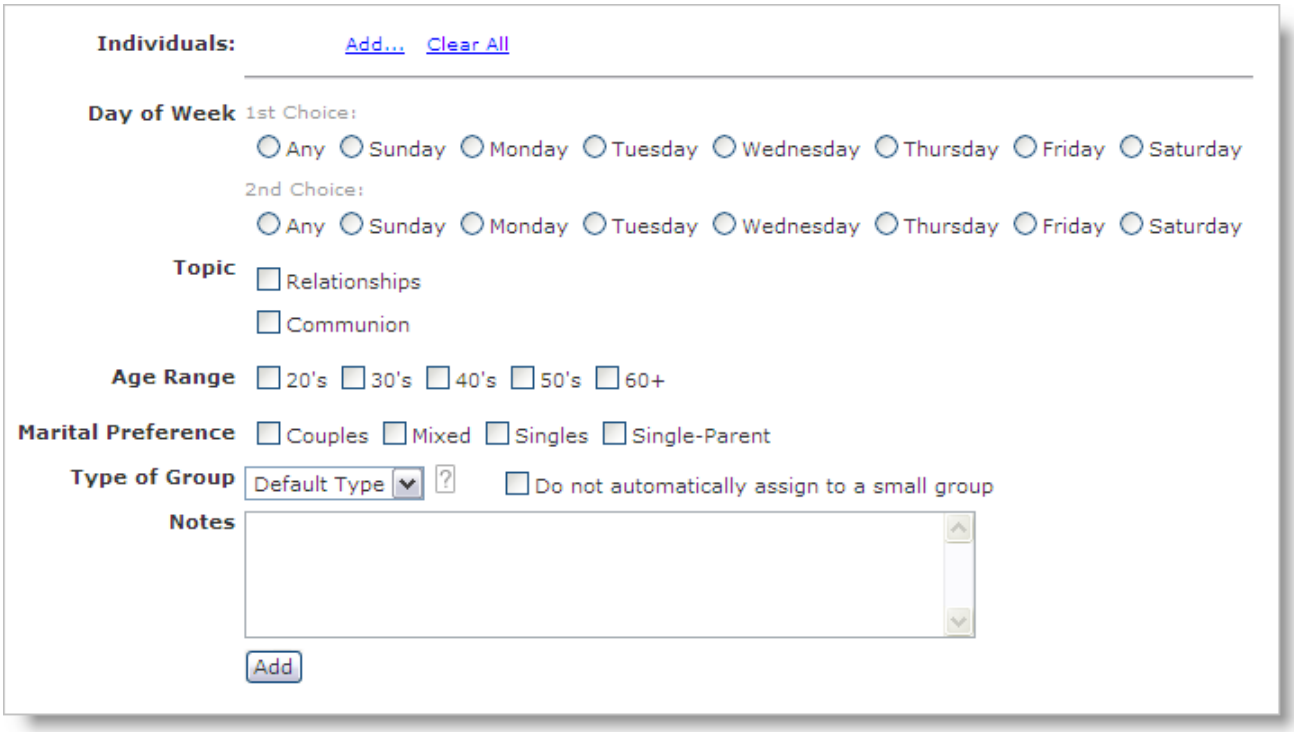
Add Registration

This feature allows you to register someone for a group in a "best fit" method. You can use the Add Registration feature when you are not certain of the Small Group in which to enroll a person. A score value determines the "best fit." The minimum score and score values are set in Organization Settings under Administration. Based on Group Details, the member provides the criteria for a Group that works for the person. Putting these values into the **Add Registrations** page determines which Groups most closely match the member's criteria. If a Group matches close enough by score, the member is placed as a Pending member for that Group. If no Groups meet the minimum score, the member becomes an unassigned Registrant, and you have to determine where they should go.

Add a Person to a Group using Add Registrations

1. From the **Groups** menu, click the **Add Registration** option.

2. Click the ***Add*** link to search and select for an existing record.
3. Select the group criteria for this person, including the **Type of Group** from the drop-down.
4. Select the **Do not automatically assign to a small group** check box, as desired. This means that the person remains as Unassigned, but in the proper Group Tree as the Group for which the person would have been pending.



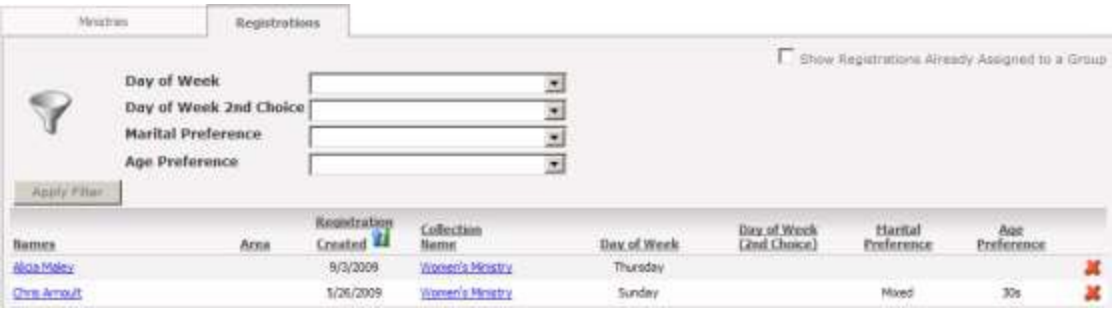
5. Click the **Add** button. Upon completion, Arena does one of the following: If Arena assigns the registrant, the Group Leader receives an email alerting the person of the pending registration. The registrant also receives an email to confirm their registration. If the member is Unassigned, an email is sent to the Leader or Administrator of the Cluster Level to notify them of the registrant, for the leader to assign the registrant to a Group. If multiple classes fit the person's criteria, administrators or leaders have the ability to assign the person to any of the classes. If the Small Group Leader does not have an email address, the Small Group Cluster Leader receives the email. If the Small Group Leaders and the Small Group Cluster Leaders do not have email addresses, then the email address in the module setting Group Leader Email in the Small Group Locator module gets the email request.

Processing Registrants

All Unassigned and Pending Registrants display on the **Registration** page. You cannot directly add Unassigned Registrants to a Group; they have to be a Pending registrant first.

Steps to Process Registrations

1. Click the **Registrations** tab of the Group Level to view unassigned.

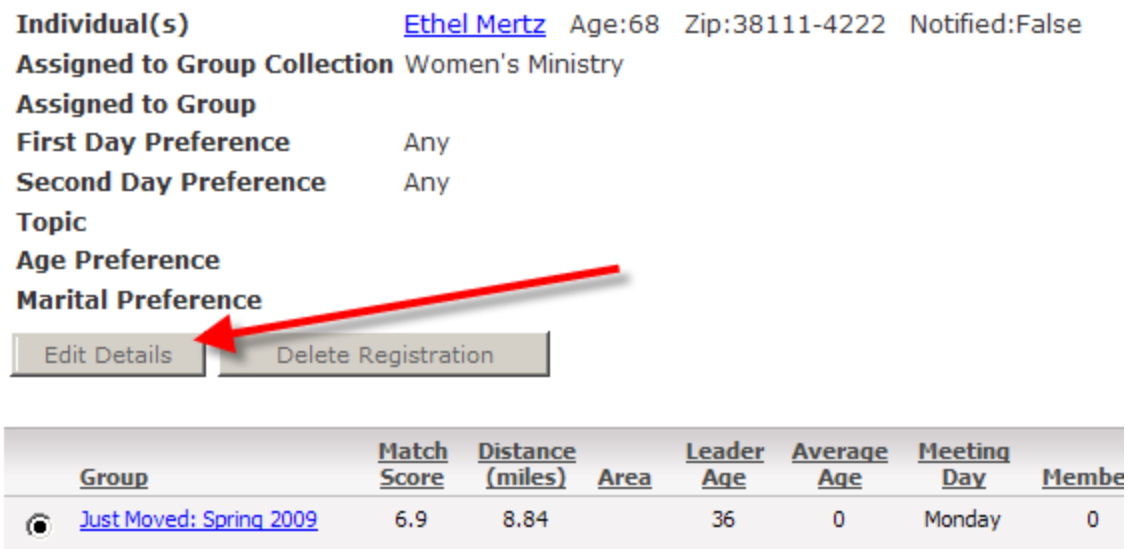


2. Click the registrant's ***Name*** link to display Registrant Details and the list of all groups within the Tree.

3. To assign a person to a group, select the radio button to the left of the Group to which you want them assigned. Click the **Assign to Group** button. Arena send emails to both the registrant and the group leader.

Edit the Registration

1. Click the **Edit Details** button from the registration page.

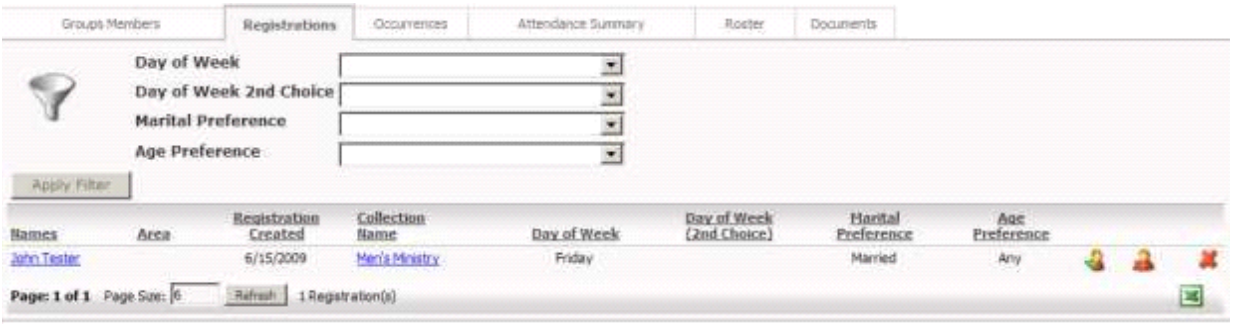


2. Select the preferred group or change the selection criteria.

3. Click the **Update** button.

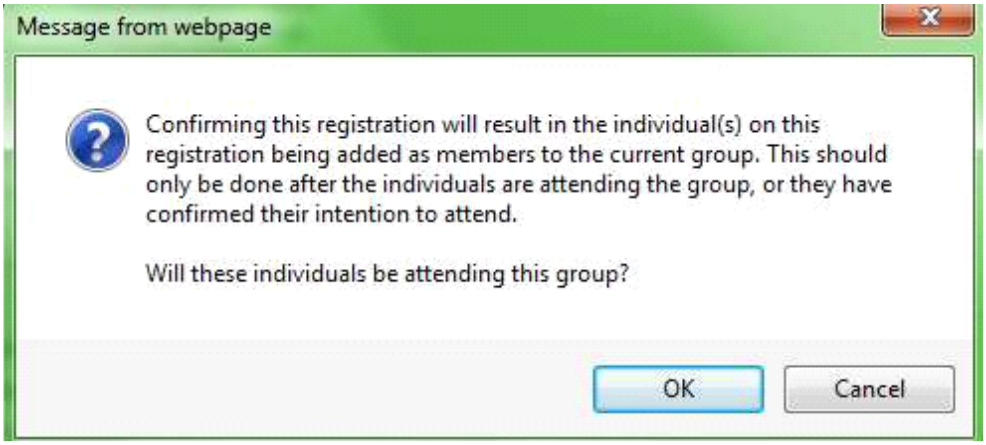
Add a Registration from the Group Page

1. Select the **Registration** tab from the **Group** page.



2. Click the **Confirm Registration** icon to add the person to the group.

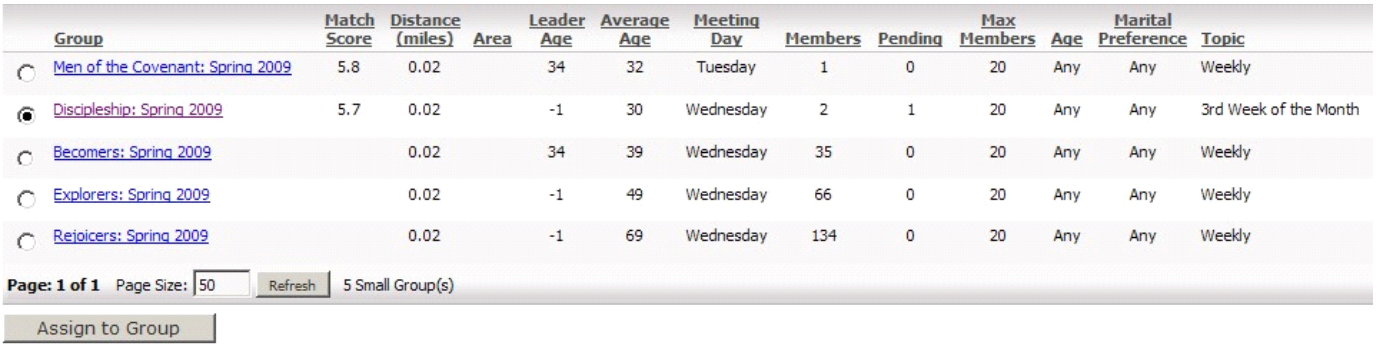
3. Click the **OK** button on the pop-up to confirm adding them to the group as a Member.



Reassign a Registrant

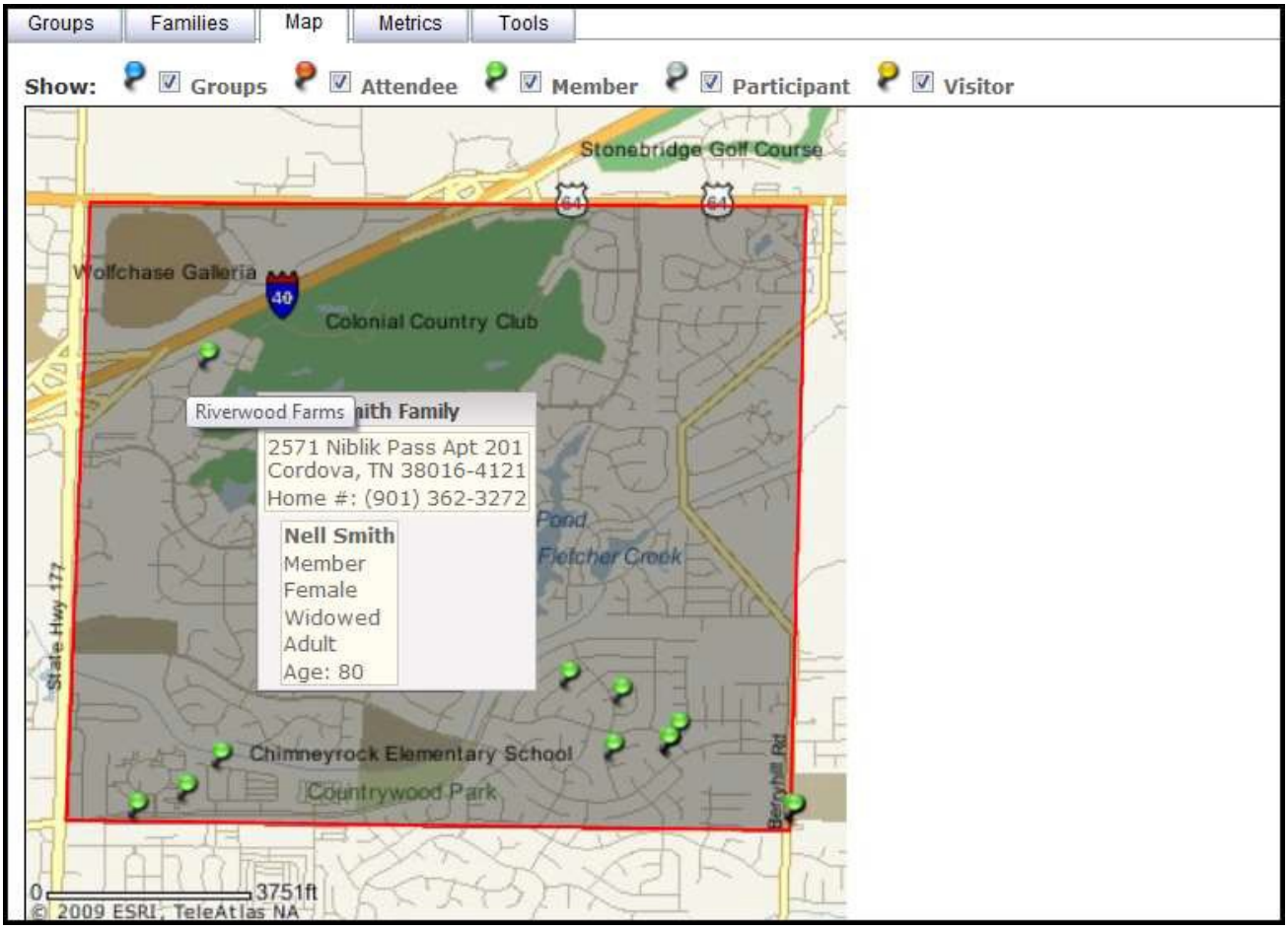
1. From the **Registrations** tab, click the ***Name*** link of the registrant.

2. Confirm the group and click the **Assign to Group** button.



Areas

The Areas section of Arena is for creating and defining group area maps. Once you create a map, Arena displays records with a primary geocoded address in the area. An area consists of three or more points creating a geometric shape on the map. The push-pins represent Attendee, Member, Participant and Visitor Membership Status.



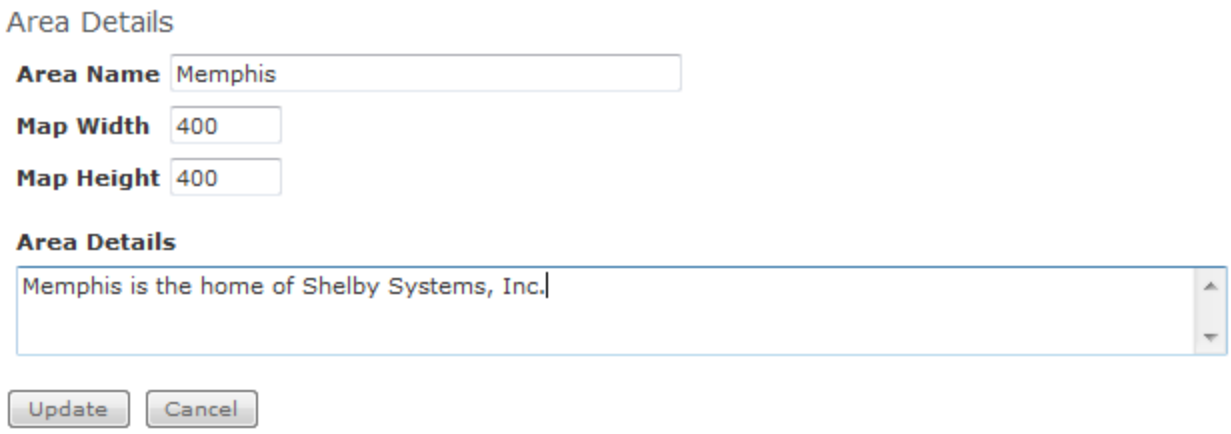
You can create points by entering in Latitude and Longitude coordinate values. However, any method of finding these values works. Individual maps must be contiguous and solid. You cannot create an Area that has a hole in it nor can an Area have several parts scattered around.

1. Click the **Areas** option under the **Groups** menu to display an ***Add*** link to create the first Area, or if an Area already exists, a Map image encompassing all Areas within shows. For example, if one area is in Texas and the other in California, the initial Areas map shows most of the western United States. Below this map, there will be a list of the already created Areas.

Add a New Area

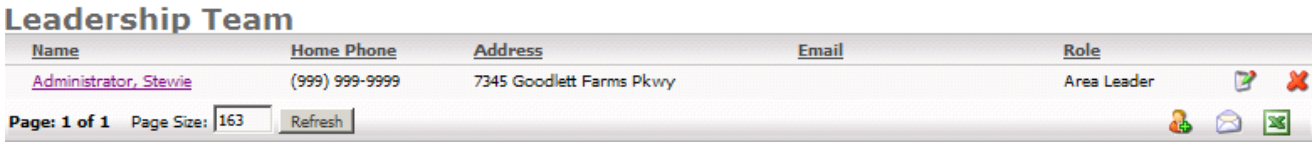
1. To add a new Area, click the **New Area** icon at the bottom of the Area list.

2. Enter the **Area Name**, **Map Width** and **Height** (in pixels) of the Area map image, and any notes in Area Details.



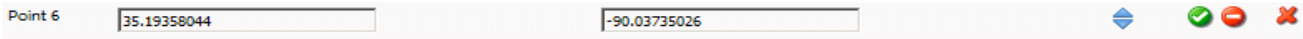
3. Click the **Add New Leader** icon to add a person to the Leadership Team of this Area, if applicable.

4. Assign the person to a **Group Area Role**.



5. Click the **Edit** icon for the coordinate.

6. Using your preferred method to obtain the longitude and latitude coordinates; enter the latitude and longitude coordinates for this map point.



7. Click the **Save** icon.

8. Repeat steps 3 through 7 for all coordinates for this map.

9. Click the **Update** button once you enter all coordinates.

Area Details

Once you create a map, opening Area Details shows a small thumbnail of that specific Area, the Area Description, Area member statistics, and a tab bar for **Groups**, **Families**, **Map**, **Metrics**, and **Tools**.

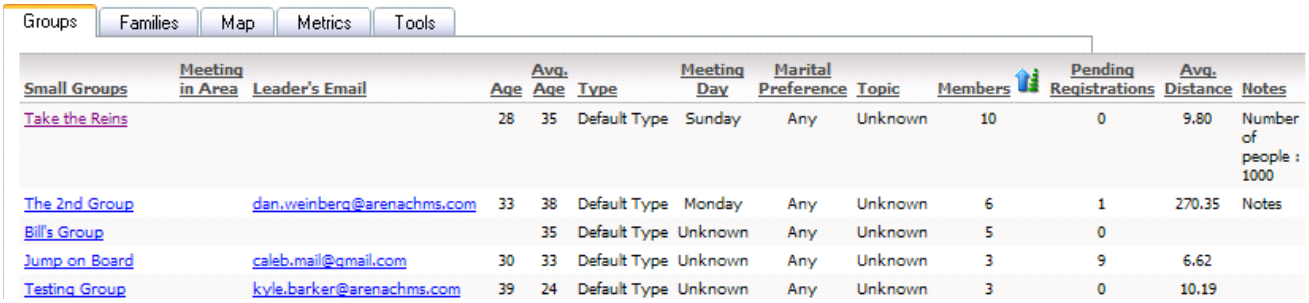
Area Statistics

Area statistics are a quick, at-a-glance way to see various totals about the number of people whose addresses fall within this Area. Area Statistics uses standardized addresses.

- **Baptized** – This is the percentage of active adults with a date value for the Baptized Person Attribute.
- **In a Group** – This is the percentage of active adults in the Area enrolled in a Small Group.
- **Serving** – This is the percentage of active adults in a Serving Tag with the status of "Connected."
- **Adults** – This is the total number of people whose family role is adult, record status is active, and their address places them in this Area.
- **Children** – This is the total number of active children whose address places them in this Area.
- **Households** – This is the total number of Families in this Area.

Groups Tab

This tab shows a list of all Small Groups that are in a set Category and have a Location that is within this Area. Click a ***Small Group*** link to open the Small Group details for that Group.

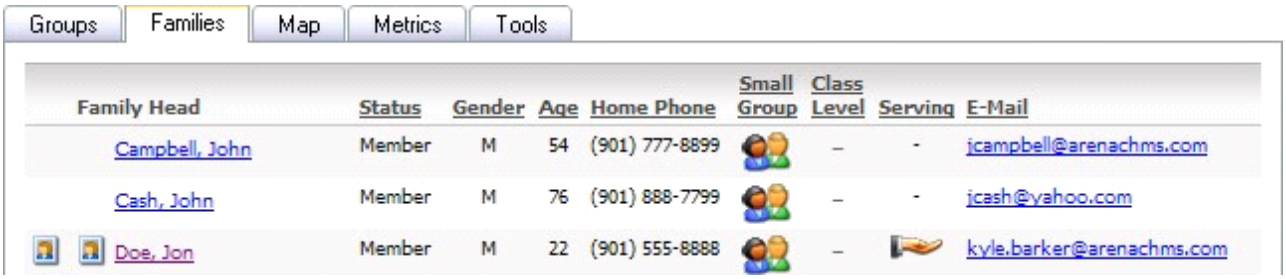


Small Groups	Meeting in Area	Leader's Email	Age	Avg. Age	Type	Meeting Day	Marital Preference	Topic	Members	Pending Registrations	Avg. Distance	Notes
Take the Reins			28	35	Default Type	Sunday	Any	Unknown	10	0	9.80	Number of people : 1000
The 2nd Group		dan.weinberg@arenachms.com	33	38	Default Type	Monday	Any	Unknown	6	1	270.35	Notes
Bill's Group				35	Default Type	Unknown	Any	Unknown	5	0		
Jump on Board		caleb.mail@gmail.com	30	33	Default Type	Unknown	Any	Unknown	3	9	6.62	
Testing Group		kyle.barker@arenachms.com	39	24	Default Type	Unknown	Any	Unknown	3	0	10.19	

Families Tab

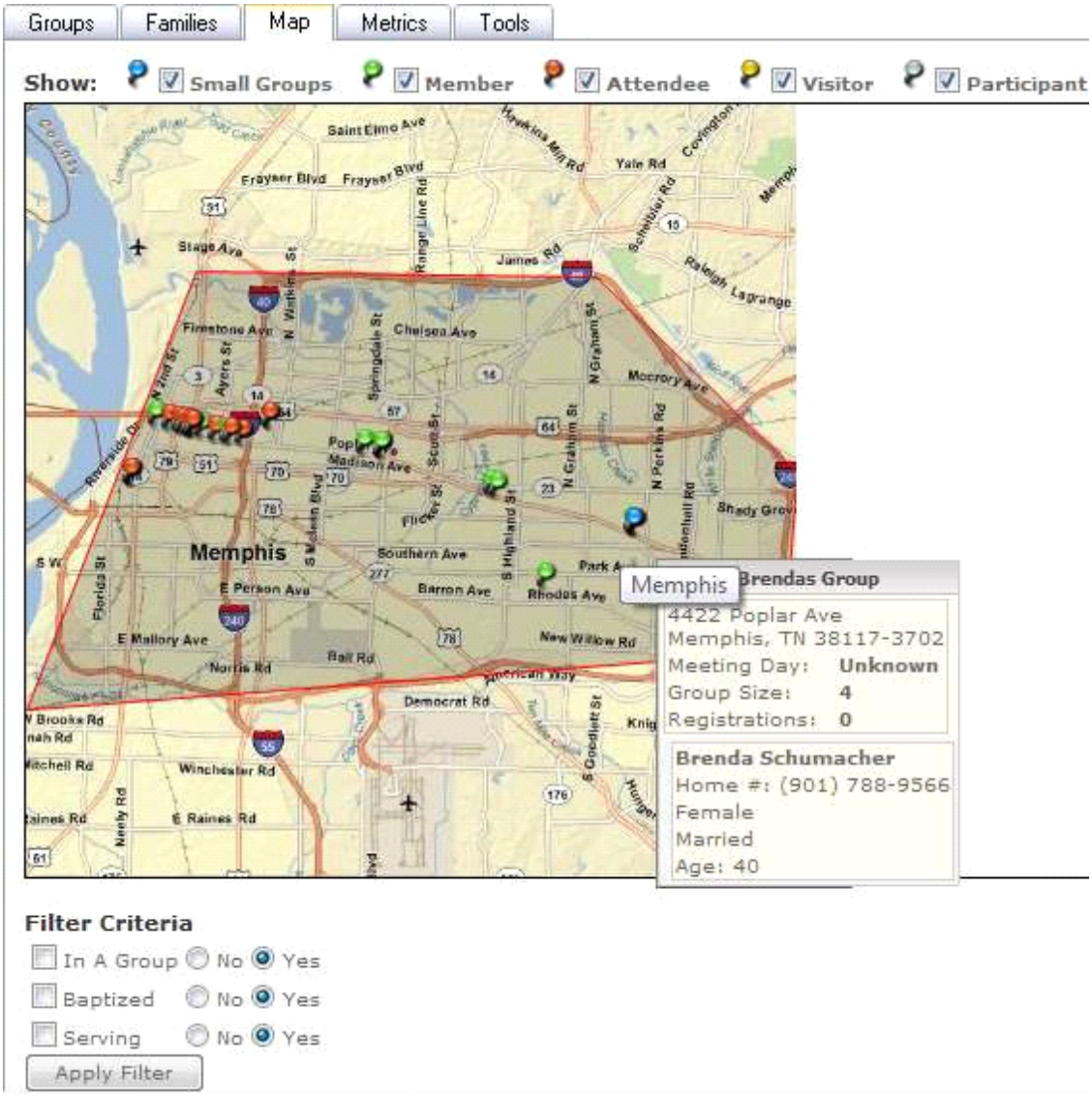
This tab displays a list of all the Families in the specific. Click a ***Family Head*** link to display the **Person Detail** page. Arena identifies Head of Household as follows: Family Role (adult over child),

gender (male over female), and age (eldest).



Map Tab

This tab displays a larger version of the Area Map, and places color-coded Pins for the various Membership Status values. Filter by checking or un-selecting a pin value or use any of the Filter Criteria below.



Click the **View Larger Map** button to see a full-page version of the map image.

Hovering over a pin displays the group information

Metrics Tab

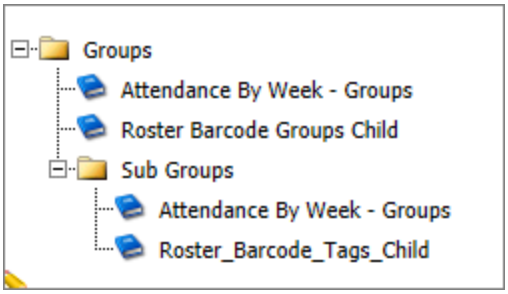
You can add Metrics to this Area. See your Arena Administrator for additional information.

Tools Tab

You can make Reports available on this tab. Reports are created using Microsoft Reporting Services.

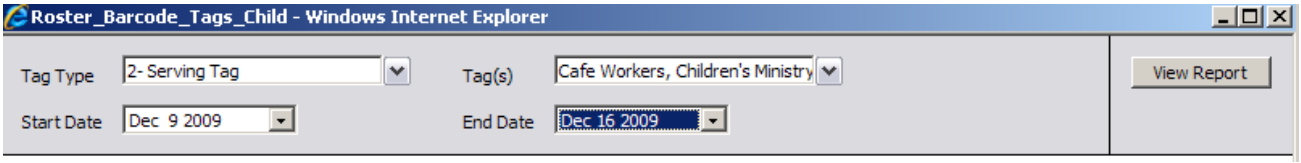
Group Reports

The Reports area for Groups has functionality identical to the Reports section in Membership. The two default reports allow you to print a roster for more than one Group or more than one Tag. You can also use these reports in conjunction with the Attendance Upload module, whereby you can upload attendance using a barcode scanner.

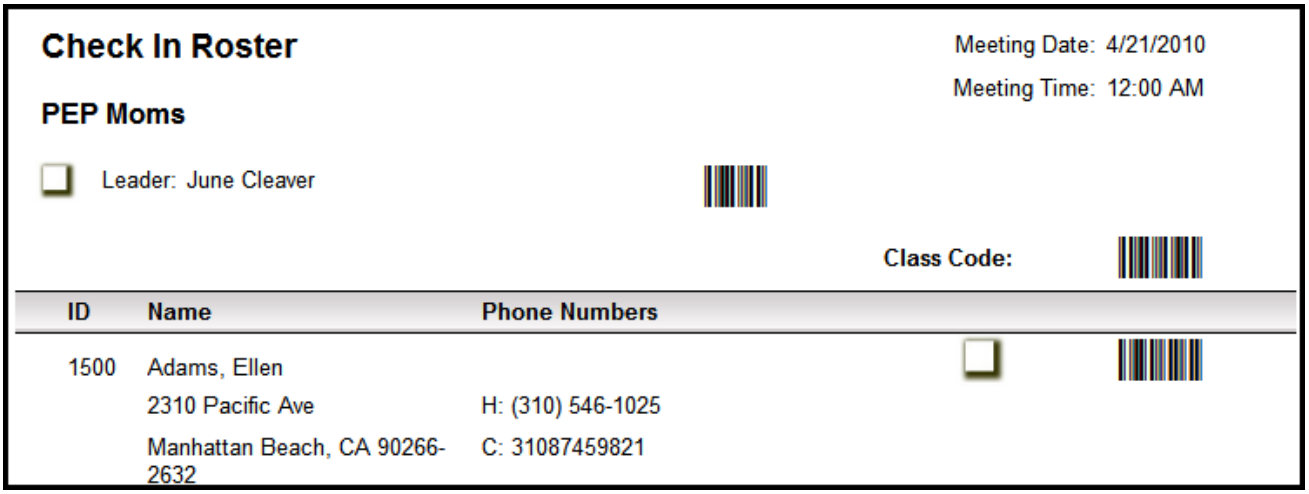


Print a Roster Report

1. Select a report.
2. Select the filters, as desired.
3. Click the **View Report** button.



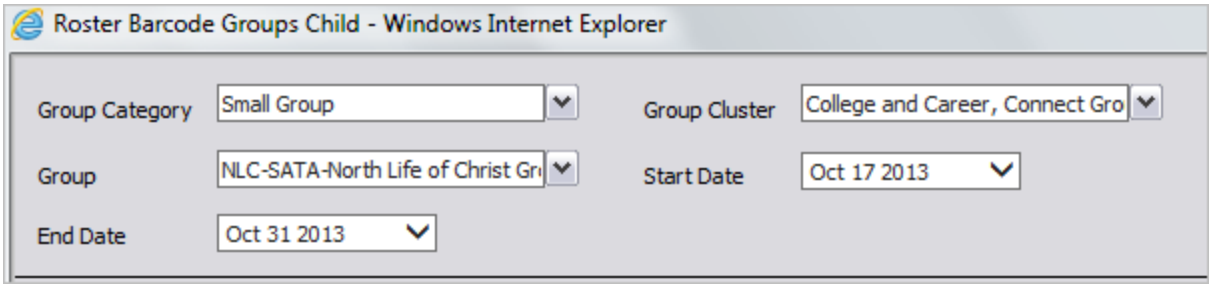
4. The reports display all records with active Tag Status for a Tag Roster and active Group members for a Group Roster.



Upload Attendance Roster

The Attendance Upload module uses Roster report with barcodes for the class, date and individual. You can print a roster report for any Group or Tag. These steps assume you are using a Roster Barcode report for either a Group or Tag and the occurrences are automatically or manually generated. If not using the default Roster report, you can use any report that contains a barcode for the occurrence and each potential attendee.

1. Print rosters for each class/group/tag.

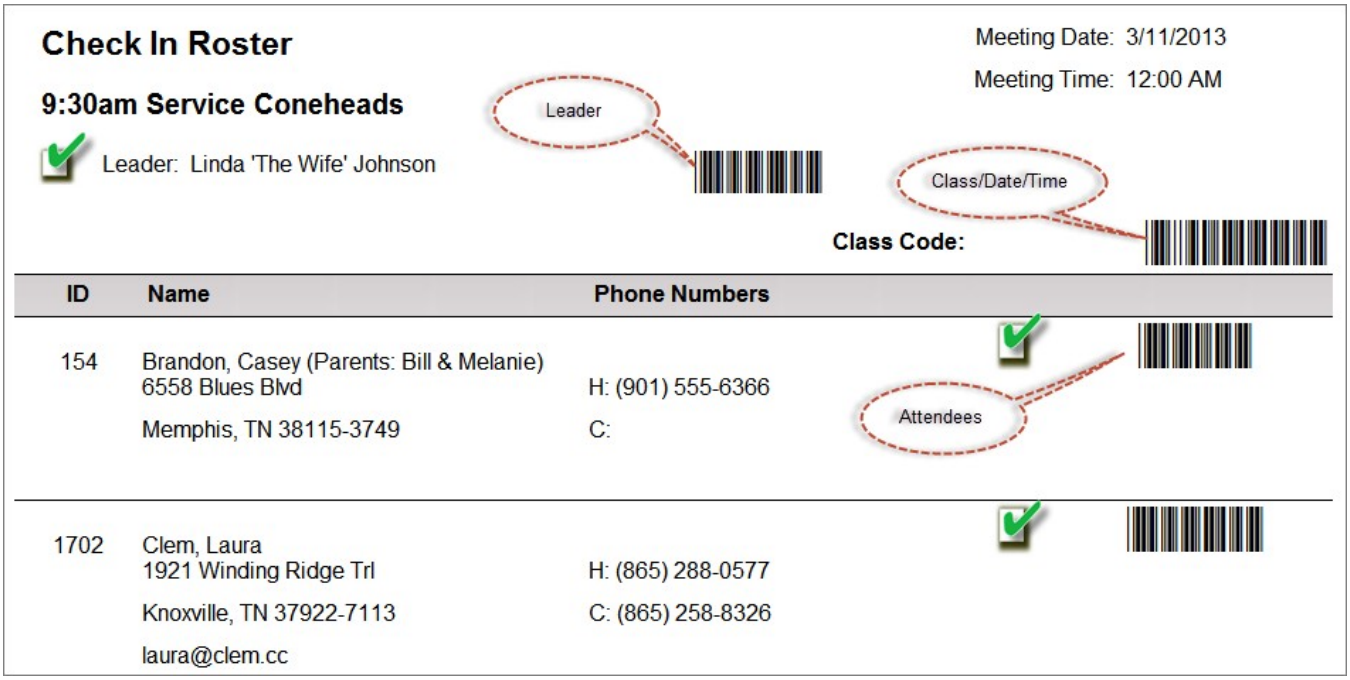


2. Mark attendance on the roster sheets.

3. Open Notepad.

4. Use barcode scanner to scan barcodes for the leader, occurrence and attendees. Make sure the barcode scanner is set to scan into a text document. If the roster has multiple pages, you

can continue to scan the Person ID codes on each page without scanning the Class Code at the top of each page. However, if a page gets out of order you can simply scan the Class Code at the top of the page and continue to scan Person ID codes, and the Attendance Upload module associates that attendance information with the correct occurrence. Most scanners work but Shelby Arena supports the Motorola CS3000.



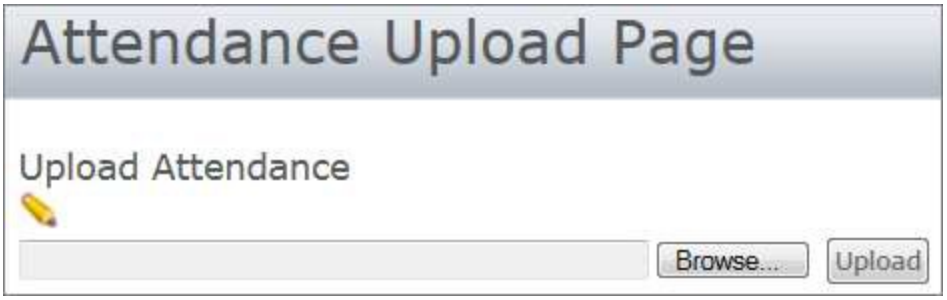
5. Repeat steps 1 through 3 for each roster. You can use the same text file to upload attendance for multiple classes by scanning in multiple rosters. You must make sure that you scan the Class Code first for each new roster to record attendance for the proper class.

6. Save the file.

7. From the **Check-In** menu, select the **Attendance Upload Page** option.

8. Click the **Browse** button to locate the scanned attendance TXT file.

9. Click the **Upload** button.

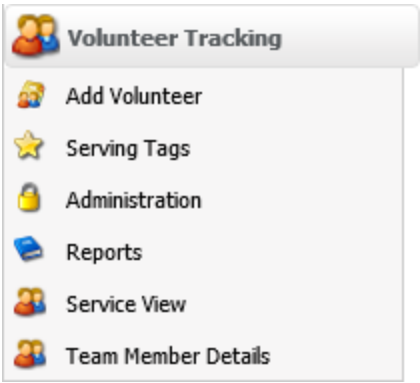


10. Go to **Attendance Summary** tab of the respective group or tag to verify attendance upload.

Volunteer Tracking

Volunteer Tracking allows you to easily communicate serving opportunities to volunteers, schedule volunteers, and track service hours.

- The **Add Volunteer** option allows you to quickly add multiple volunteers to a serving opportunity using a tag.
- The **Serving Tags** option allows you to create tags and assign them to records.
- The **Administration** option allows you to filter, view, update, and export your Serving Tag members.
- There is also an option to use Reporting Services to create and run **Reports**.
- Use the **Service View** option to create and manage Services, Teams, and Volunteer positions.
- View details about team members and export in various formats using the **Team Members Details** option.

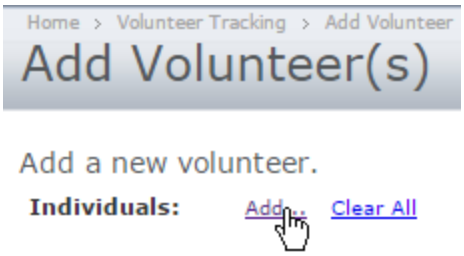


Add Volunteer

Although volunteers can be added on the **Serving Tags** page, the **Add Volunteer** page is useful as a quick way to add several records to a ministry tag where the **Source** and/or **Notes** for the tag are the same. So, let's say you have several people who marked a communication card as interested in serving as a Greeter. This is a quick and easy way to add those volunteers to the Greeter Serving Tag.

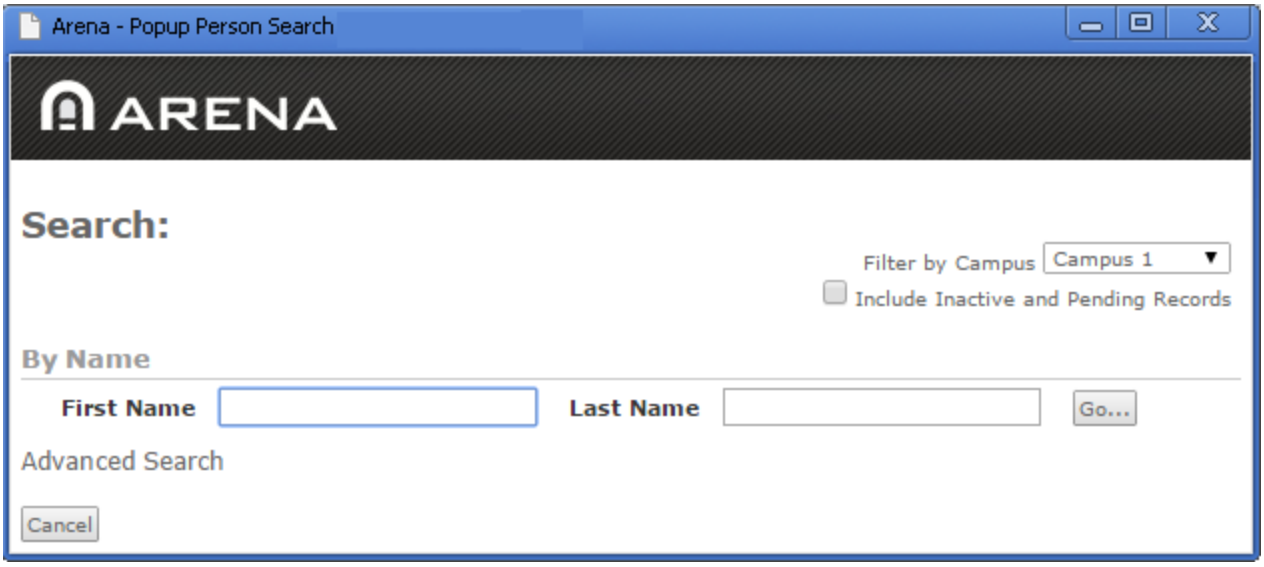
The other advantage of having the **Add Volunteer** page is that it can be secured separately. This allows you to create a security role where a user is allowed to add volunteers but does not have access to modify the **Serving Tags**.

1. To get started adding volunteers, click the ***Add*** link.



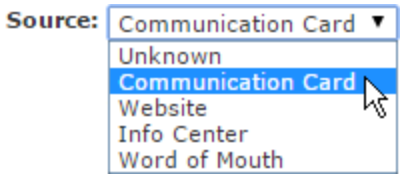
2. Use the **Person Search** window to select records.

NOTE: There is an option to **Filter by Campus** in the upper right-hand corner.

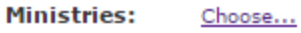


3. Click the **Delete** icon to remove a record from the "Add a new volunteer" process. This does not delete the name from the database; it only removes the name from the process of being assigned a Serving Tag.

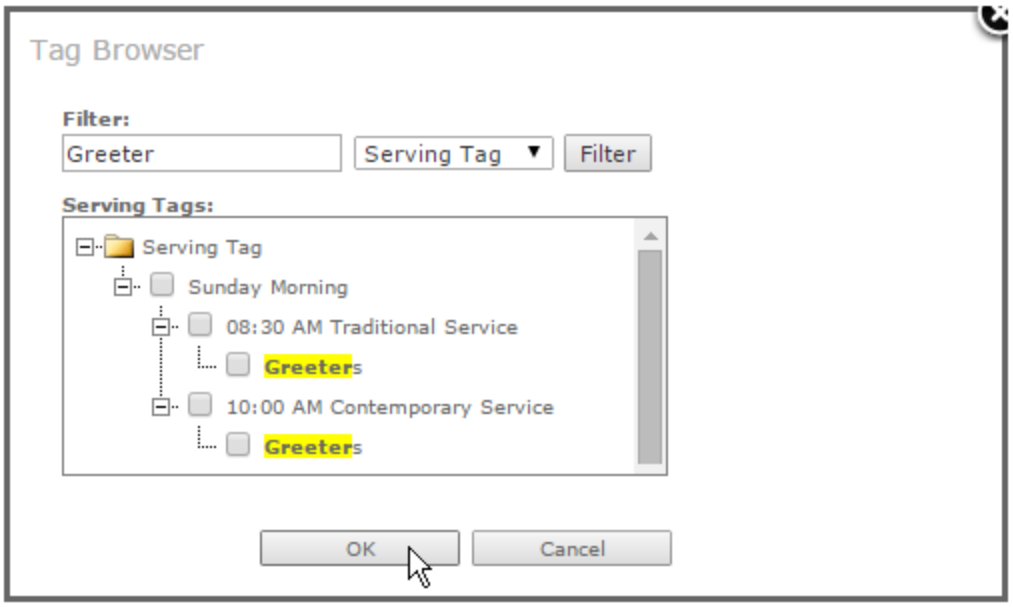
4. Select the **Source**. The source specified here is assigned to all the individuals listed.



5. Click the ***Choose*** link to view the Tag Browser window.

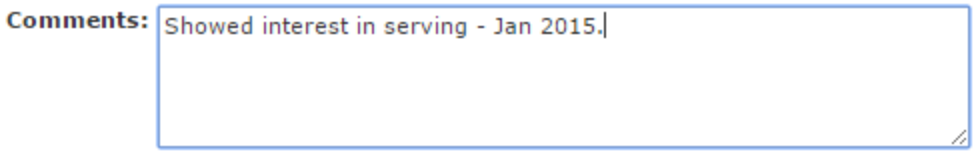


6. Use the **Tag Browser** window to select the **Serving Tags** to be assigned.



7. Select the check boxes next to the Serving Tags then click the **OK** button.

8. Add any notes in the **Comments** text box.



NOTE: The Comments display in the **Notes** section on the **Tag Member Details** page.

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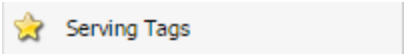
9. Click the Add button to add the volunteers to the Tags.

Serving Tags

The Serving Tags option in **Volunteer Tracking** is the same as the Serving Tags option under the **Tags** menu. See the Serving Tags page for detailed information on Serving Tags. This option allows you to create tags and assign them to records.



When setting up **Serving Tags** to use with **Service View**, set up the levels of the **Serving Tags** to match the structure of the **Service View**. Having the levels match make it easier to build your teams and assign your members from the Service View page.

For example, if you have two "Greeter" teams that are scheduled for the Sunday 8:30 AM service, organize both your **Serving Tags** and **Services** in the following manner:

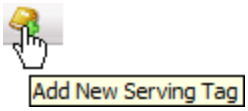
Sunday 8:30 AM > Greeters > Team 1

Sunday 8:30 AM > Greeters > Team 2

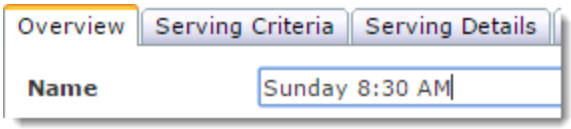
Below are the Steps for setting up a **Serving Tag** for "Team 1" and assigning a few members.

1. From the Volunteer Tracking menu, click the **Serving Tags** option.

2. From the **Serving Tags** page, click the **Add New Serving Tag** icon in the lower right-hand corner.

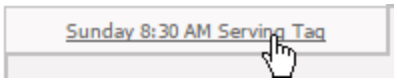


3. Enter the **Name** for the Serving Tag and click the Update button.



4. Add the 2nd level for the **Serving Tag**. (Greeters)

5. Click the first tab of the Serving Tag.

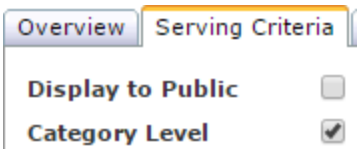


6. Click the ***Add*** link in the lower left-hand corner.

7. Enter the Name for the next level **Serving Tag** and click the **Serving Criteria** tab.

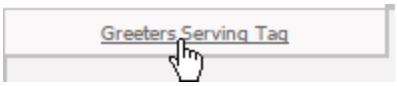
8. Select the **Category Level** check box and click the Update button.

NOTE: Selecting the **Category Level** check box is optional. It adds the capability to filter by this Tag using the **Category** drop-down on the **Administration** page.



9. Add the 3rd level for the **Serving Tag**. (Team 1)

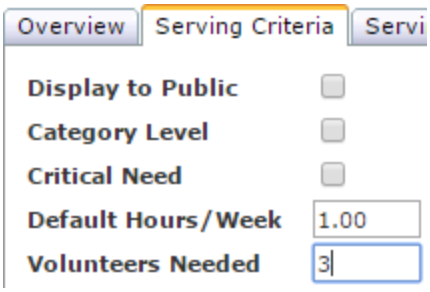
10. Click the first tab of the **Serving Tag**.



11. Click the ***Add*** link in the lower left-hand corner.

12. Enter the **Name** for the next level **Serving Tag** and click the **Serving Criteria** tab.

13. Enter the **Volunteers Needed** and click the Update button.

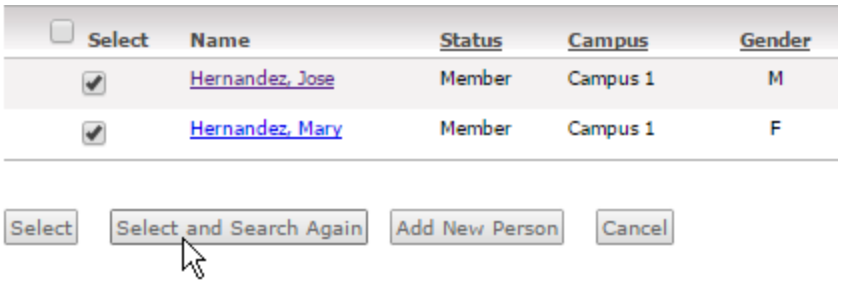


14. Assign records to the last **Serving Tag**. (Jose & Mary Hernandez, Louise Baker)

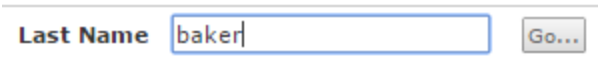
15. Click the **Add New Member** icon.

16. Enter a "Last Name" and click the **Go** button.

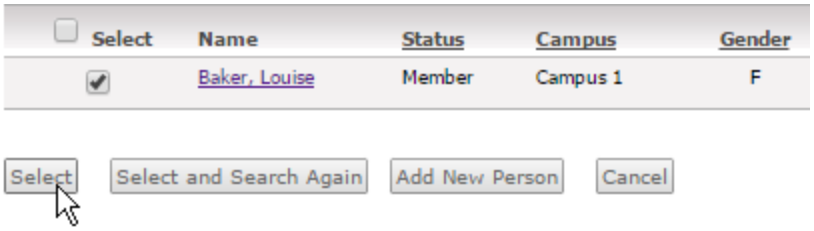
17. Check the boxes next to the names to add and then click the **Select and Search Again** button.



18. Enter the "Last Name" of another record and click the **Go** button.



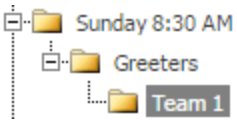
19. Select the check box next to the record to add then click the **Select** button.



20. Notice the records are listed on the **Tag Details** Page.

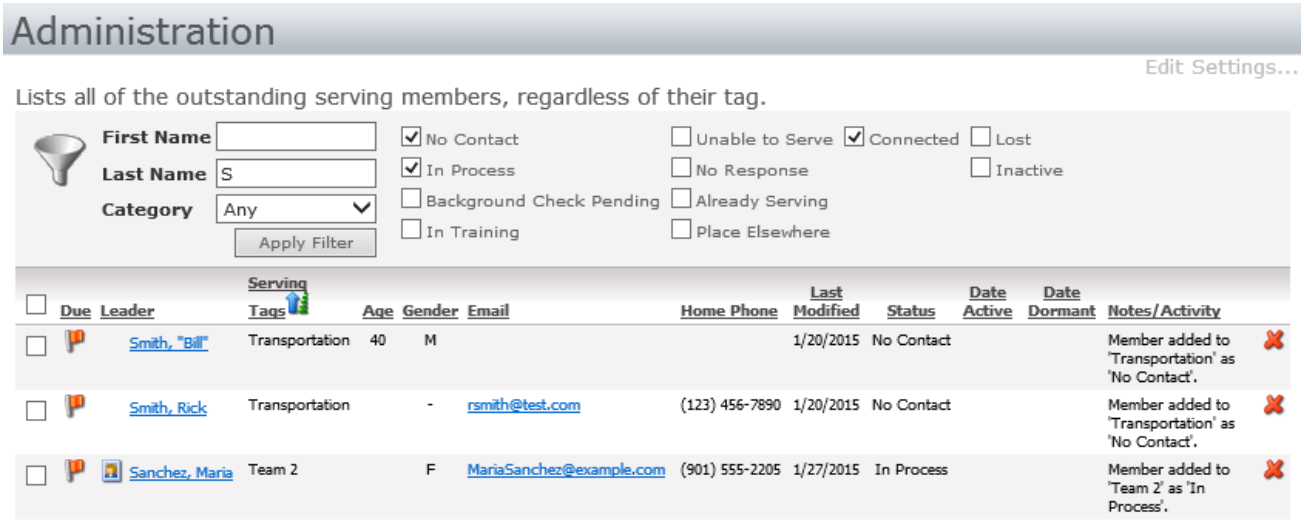
Due	Leader	Age	Gender	Email	Home Phone
	Baker, Louise		F	LouiseBaker@example.com	(901) 555-2202
	Hernandez, Jose		M	JoseHernandez@example.com	(901) 555-2201
	Hernandez, Mary		F	MaryHernandez@example.com	(901) 555-2201

21. Click the ***Show Tree View*** link to view the Tag levels.



Volunteer Administration

The **Administration** option displays information needed to process Volunteers and place them in a specific Serving Tag or status. Use the Filters at the top of the grid to narrow the results. Click an underlined column header to sort the grid by that column. The first click sorts ascending. The second click sorts descending. Additional clicks switch between ascending and descending.



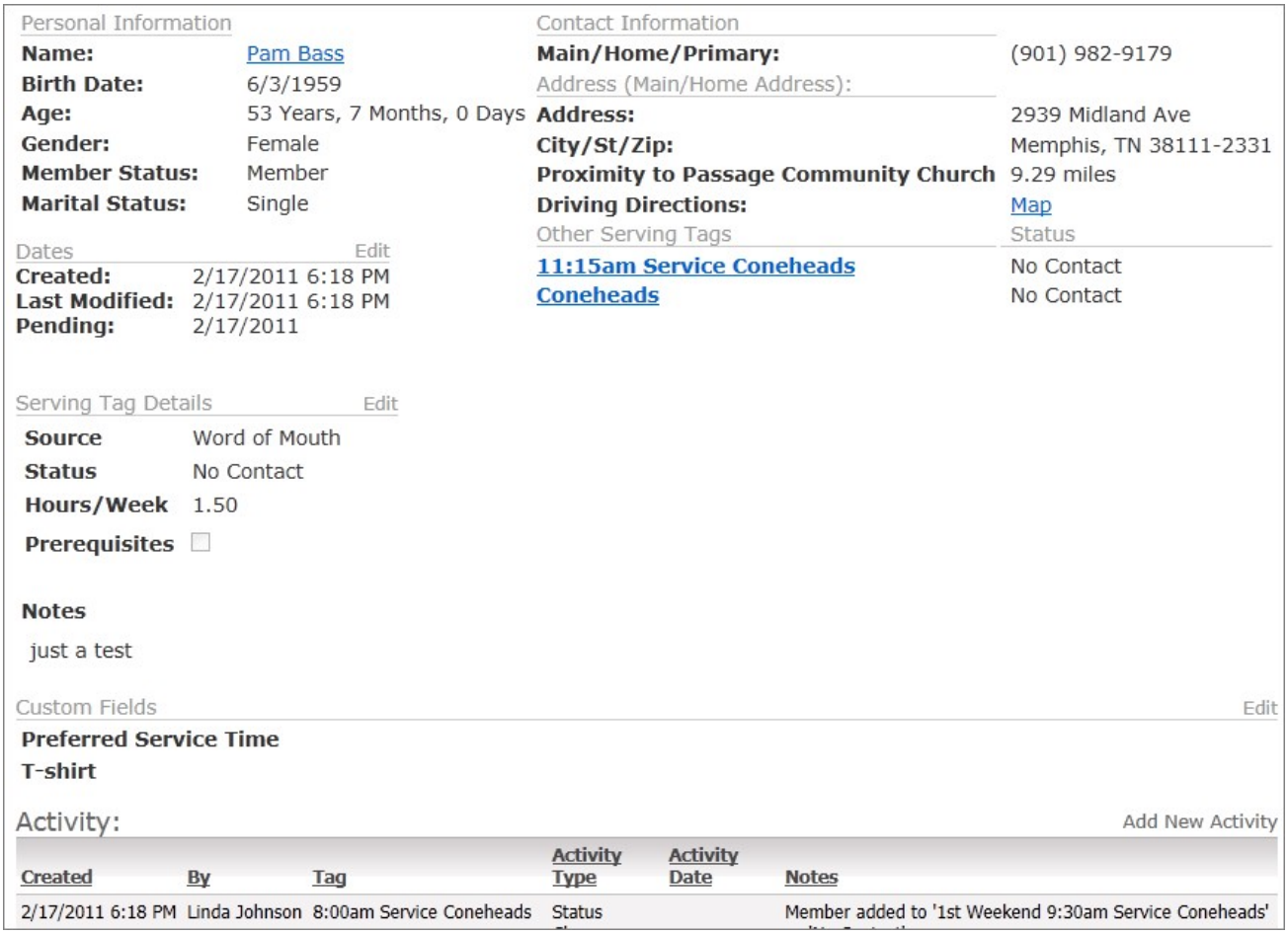
- **Check Boxes** – Use these boxes to select specific records to Email, Word merge, SMS, Bulk Update or export to Excel.
- **Flags** – The flags denote the status of the volunteer.

Status	Description
- Green	Record has been modified in the last week.
- Yellow	Record has not been modified in over a week.
- Red	Record has not been modified in over 4 weeks.

- **Name (Leader)** – Click the ***Name*** link to make changes to the person's serving tag e-card. If the person is listed more than once, it reflects they are interested or serving in several areas.
- **Serving Tags** – This column lists serving tags to which the person is linked.
- **Age** – This column display the person's age.
- **Gender** – This column displays the person's gender.
- **Email** – This column displays the person's preferred email address.
- **Home Phone**- This column displays the person's home phone number.
- **Last Modified** – This is column displays the date of last modification to the serving tag e-card.
- **Status** – This is the current serving status of the person. Status options are Lost, Connected, No Contact, In Process, Unable to Serve, No Response, Already Serving, Place Elsewhere, Background Check Pending, Inactive, and In Training.
- **Date Active** – This column displays the date when the person was first added to the specific tag.
- **Date Dormant** – This column displays the dormant date for the person in the tag.
- **Notes/Activity** – This is the most recent note or activity.

Update a Volunteer

From the **Volunteer Tracking** menu, click the **Volunteer Administration** option. Select the record you wish to edit by clicking the person's ***Name*** link. This page displays the relevant Personal Information, Contact Information, Address Information, the dates associated with this Volunteer application, the Serving Tag details and any notes added during its creation. This page also lists all of the person's activities such as joining or leaving a Service Tag.



Personal Information

Name:	Pam Bass
Birth Date:	6/3/1959
Age:	53 Years, 7 Months, 0 Days
Gender:	Female
Member Status:	Member
Marital Status:	Single

Dates Edit

Created:	2/17/2011 6:18 PM
Last Modified:	2/17/2011 6:18 PM
Pending:	2/17/2011

Serving Tag Details Edit

Source	Word of Mouth
Status	No Contact
Hours/Week	1.50
Prerequisites	☐

Notes

just a test

Contact Information

Main/Home/Primary:	(901) 982-9179

Address (Main/Home Address):

Address:	2939 Midland Ave
City/St/Zip:	Memphis, TN 38111-2331
Proximity to Passage Community Church	9.29 miles
Driving Directions:	Map

Other Serving Tags	Status
11:15am Service Coneheads	No Contact
Coneheads	No Contact

Custom Fields Edit

Preferred Service Time

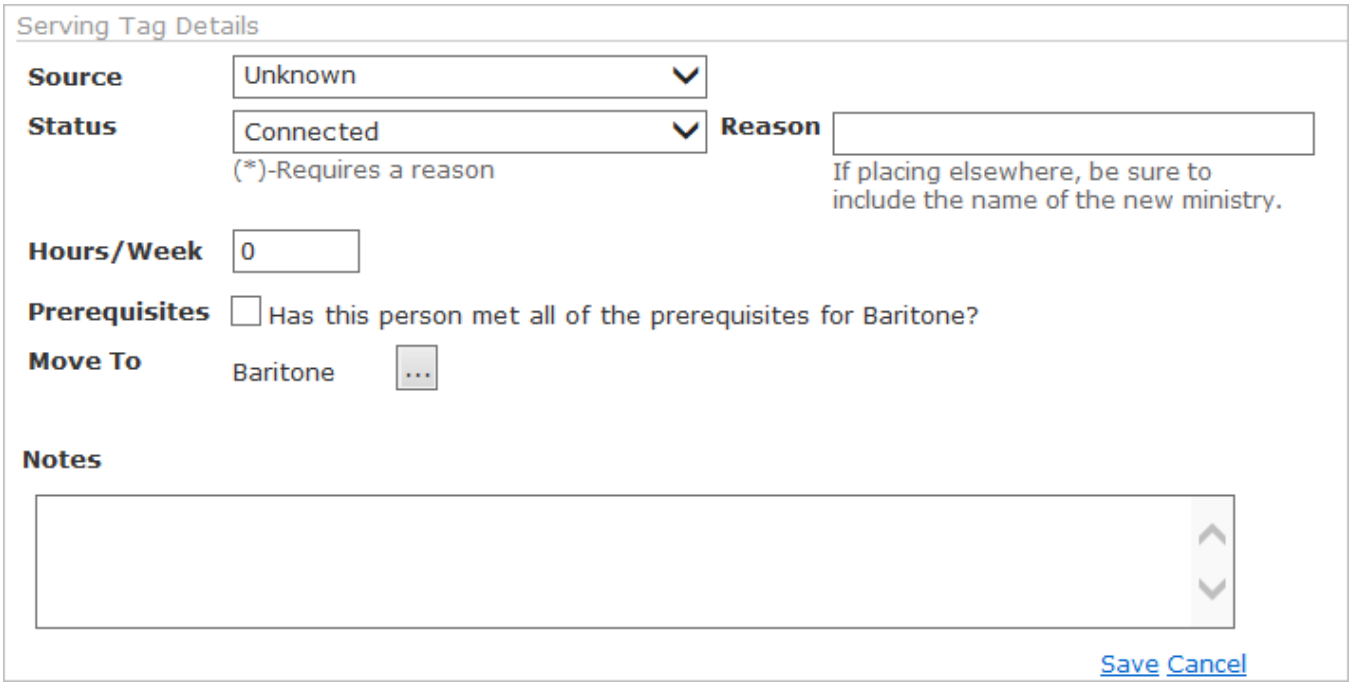
T-shirt

Activity: Add New Activity

Created	By	Tag	Activity Type	Activity Date	Notes
2/17/2011 6:18 PM	Linda Johnson	8:00am Service Coneheads	Status		Member added to '1st Weekend 9:30am Service Coneheads'

- **Personal Information** – This section displays basic demographic information about the volunteer.
- **Contact Information** – This section displays the volunteer's phone number(s).
- **Address** – This section displays the volunteer's address.
- **Other Serving Tags** – This section displays all serving tags where the volunteer is an existing member, along with the status for each tag.
- **Dates** – This section displays the original volunteer date, the last date this volunteer record was changed and the date the volunteer was pending.
- **Serving Tag Details** – This section displays the current details for the current tag. Use this section to change tag status, assign to a different tag or enter comments.
- **Custom Fields** – This optional section displays Member Custom Fields for the tag.
- **Activity** – Use this tag specific section to document additional notes for the volunteer.

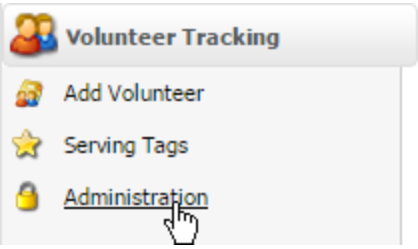
The screen below displays when you click the ***Edit*** link on the **Serving Tag Details** section.



- **Source** – Use this drop-down to select how the volunteer became aware of the volunteer opportunity.
- **Status** – Use this drop-down to change the status of the volunteer.
- **Reason** – Enter a reason when a status is changed. A reason is required for any (*) status.
- **Hours/Week** – Enter the number of hours per week the position requires.
- **Prerequisite** – Select this check box to reflect the volunteer meets all requirements for the volunteer position.
- **Move to** – Use this drop-down to move a volunteer to another Serving Tag position. When you move someone to a new Serving Tag, the person has a default 'No Contact' status.
- **Notes** – Use this box to enter any additional comments for this volunteer.

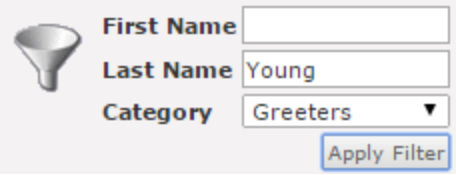
Below are the steps for filtering a volunteer with the **Last Name** of "Young", viewing and updating his record, and then exporting a list of all the greeters.

1. From the **Volunteer Tracking** menu, click the **Administration** option.

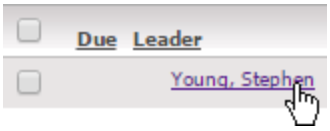


2. Enter "Young" in the **Last Name** field, select "Greeters" from the **Category** drop-down box

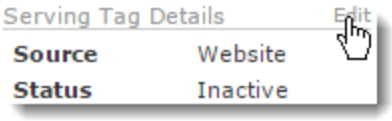
and then click the Apply Filter button.



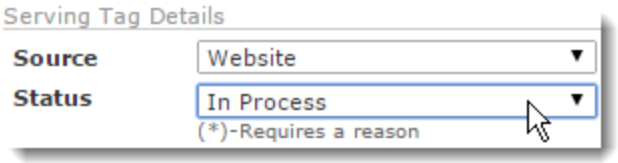
3. Click the ***Name*** link for "Stephen Young". The **Tag Member Details** page appears.



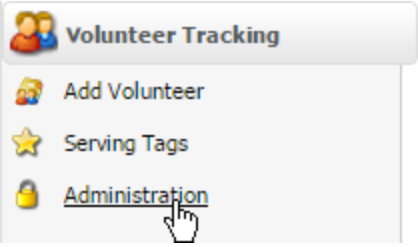
4. Click the ***Edit*** link next to the **Serving Tag Details** section.



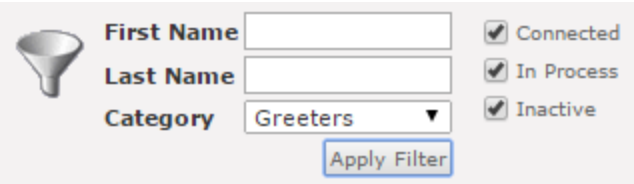
5. Change the **Status** from "Inactive" to "In Process", then click the ***Save*** link.



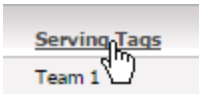
6. Let's return to the **Administration** page to view and export all the greeters. From the **Volunteer Tracking** menu, click the **Administration** option.



7. Select "Greeters" from the **Category** drop-down box, select all the **Status** check boxes, and then click the Apply Filter button.



8. Click the Serving Tags column header to resort the records by their assigned Serving Tags.



9. View the records listed. Click the ***Email*** link to send an email to a volunteer.

NOTE: Click any column header that is underlined to sort the list by that column header.

Due	Leader	Serving Tags	Age	Gender	Email	Home Phone	Last Modified	Status
	Baker, Louise	Team 1		F	LouiseBaker@example.com	(901) 555-2202	2/2/2015	In Process
	Hernandez, Jose	Team 1		M	JoseHernandez@example.com	(901) 555-2201	2/3/2015	In Process
	Hernandez, Mary	Team 1		F	MaryHernandez@example.com	(901) 555-2201	2/2/2015	In Process
	Young, Stephen	Team 1		M	StephenYoung@example.com	901552218	2/3/2015	In Process
	Collins, Allen	Team 2		M	AllenCollins@example.com	(901) 555-2203	2/3/2015	In Process
	Parker, Charles	Team 2		M	CharlesParker@example.com	(901) 555-2204	2/3/2015	In Process
	Sanchez, Maria	Team 2		F	MariaSanchez@example.com	(901) 555-2205	2/3/2015	In Process

10. Click the **Export Data to Excel** icon located in the lower right-hand corner. Your browser prompts you when the Excel file is complete.

Notice there are also options to **Mail Merge**, **Bulk Update**, **Send Email**, and **Send Text Message** using the other icons displayed in the lower right-hand corner.

Reports

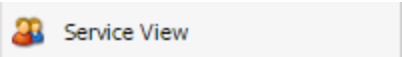
See your Arena Administrator about setting up volunteer reports from Reporting Services.

Service View

Service View is used for viewing and managing services and assigning volunteers to services. A service is an opportunity for a volunteer to serve, which could be anything from a Sunday morning service to a fund-raising event, special service or function.

The **Calendar** is used to view active, inactive, past, and black-out dates. The **Service Header** displays details about the Service and allows you to copy, add, modify, and delete services along with other functionality. The **Team Builder** and **Assign People** boxes assist you in assigning teams and individuals to a service.

By default, if a service exists, the header will display the next future service after the current date/time.



NOTE: Hover over an icon to view a tip describing the icon.

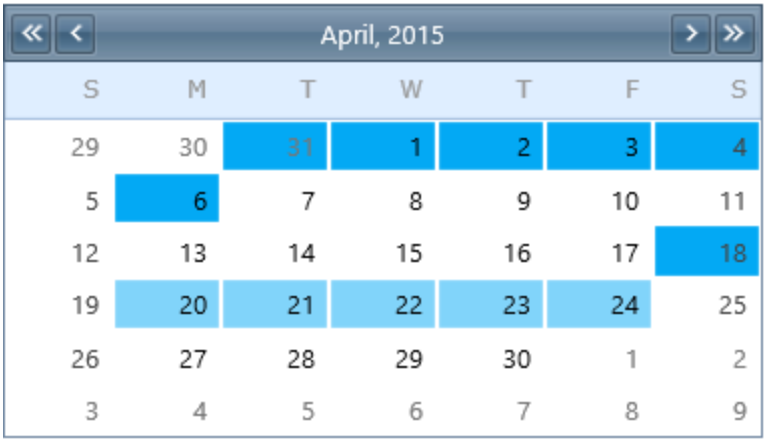
Calendar

The **Calendar** displays the current month by default. Future services that are active show up as highlighted days on the calendar. If the options to 'Include Inactive Future Services' and 'Include Past Services' are selected in the service header, those days with those types of services are also highlighted on the calendar. Each type of service has a specific color that reflects what the current status the service is in.

Active Future Services are highlighted **blue**.

Inactive Future Services are highlighted **light blue**.

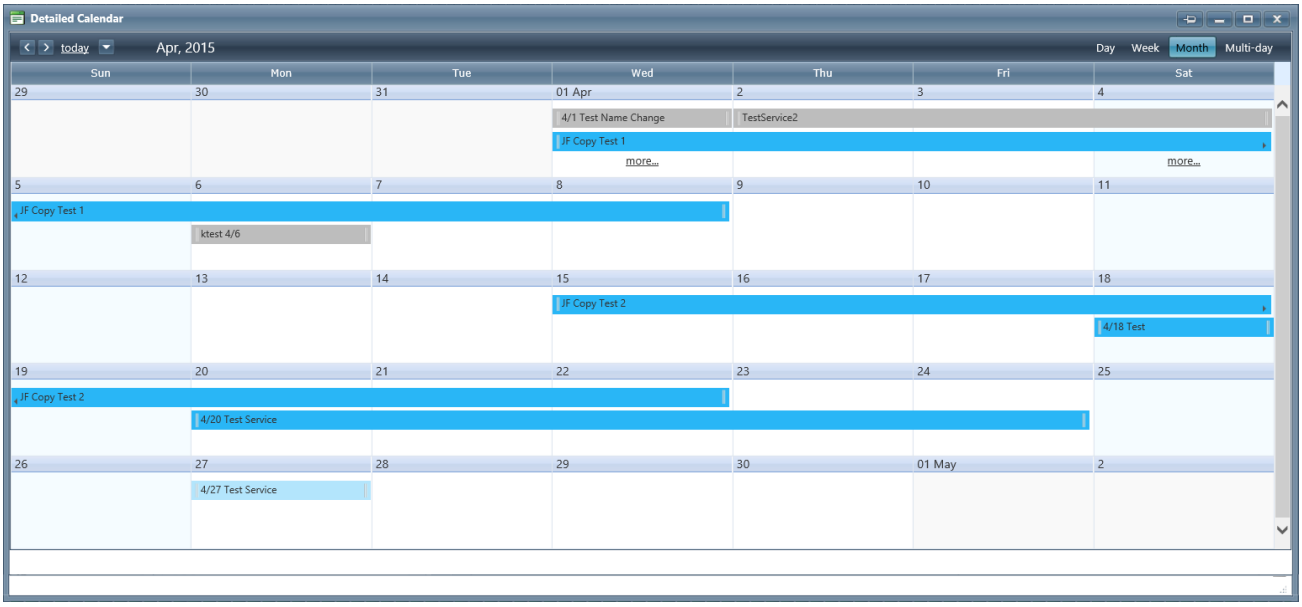
Past Services are highlighted **grey**.



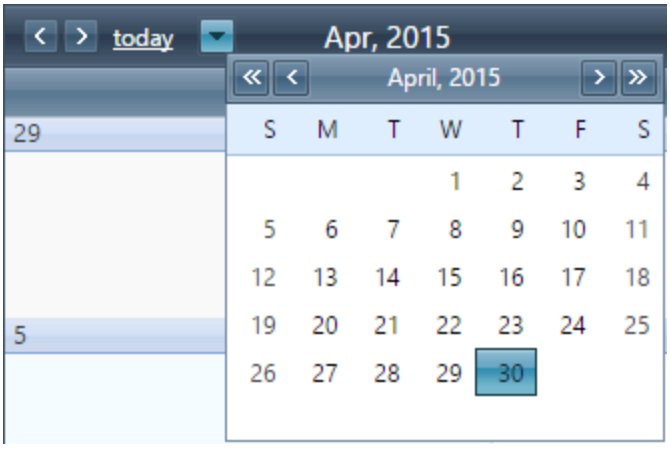
The **Open Detailed Calendar** option displays a larger view of the current month, showing service days and the names of the service. The month being displayed may be changed using the available navigation buttons on the toolbar. The detailed calendar shows current services and, if the options have been selected to include inactive future services and include past services, displays past and inactive future services.

Services are highlighted with the same colors as the small calendar.

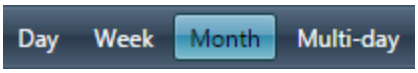
- **Future active** services are highlighted on the detailed calendar in blue.
- **Past** services are highlighted on the detailed calendar in gray.
- **Future inactive** services are highlighted on the detailed calendar in light blue.



The displaying month can be changed using any of the options on the toolbar.

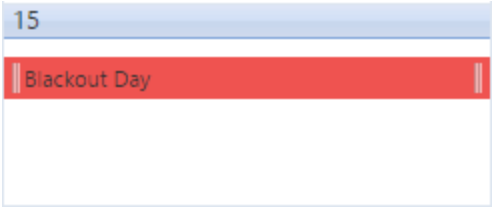


The detailed calendar view can also be changed to display for **Day**, **Week**, **Month**, or **Multi-Day** view.

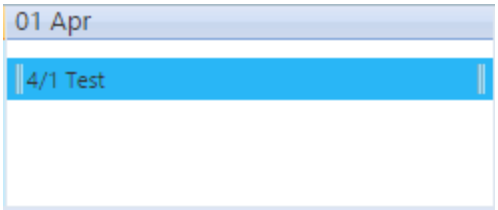


The detailed calendar shows service dates highlighted in blue. The Blackout dates are highlighted in red.

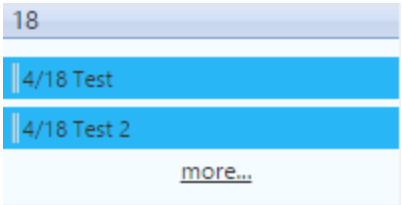
Blackout dates have the text 'Blackout Day' in the highlighted section.

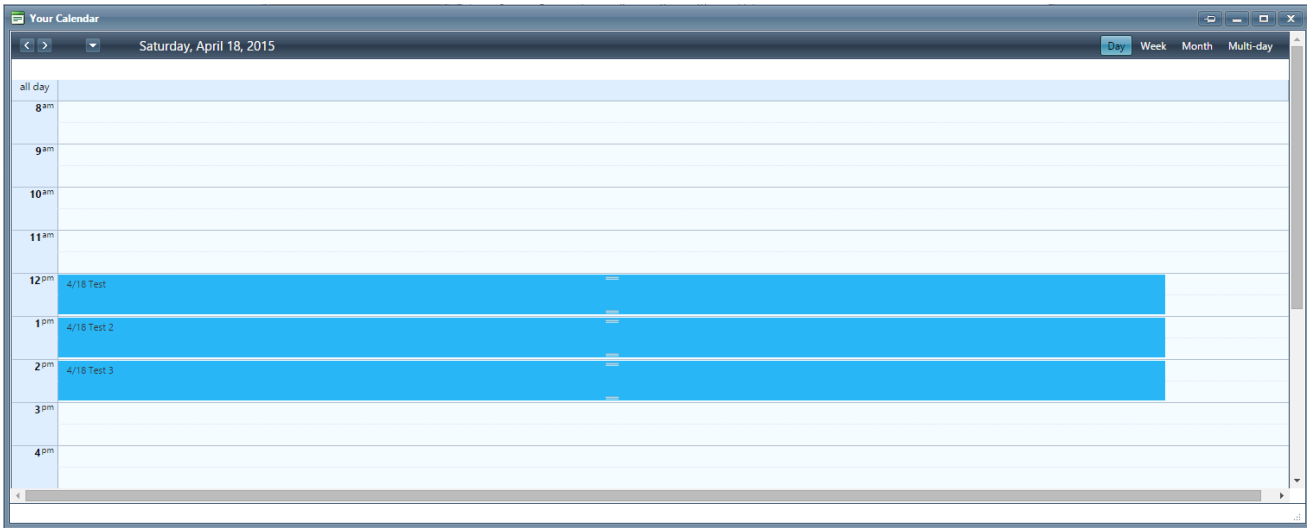


Service days have the name of the service in the highlighted section.



Calendar days that have more than two items to display, display a ***More*** link, that when clicked displays the days services or blackouts on calendar day view.

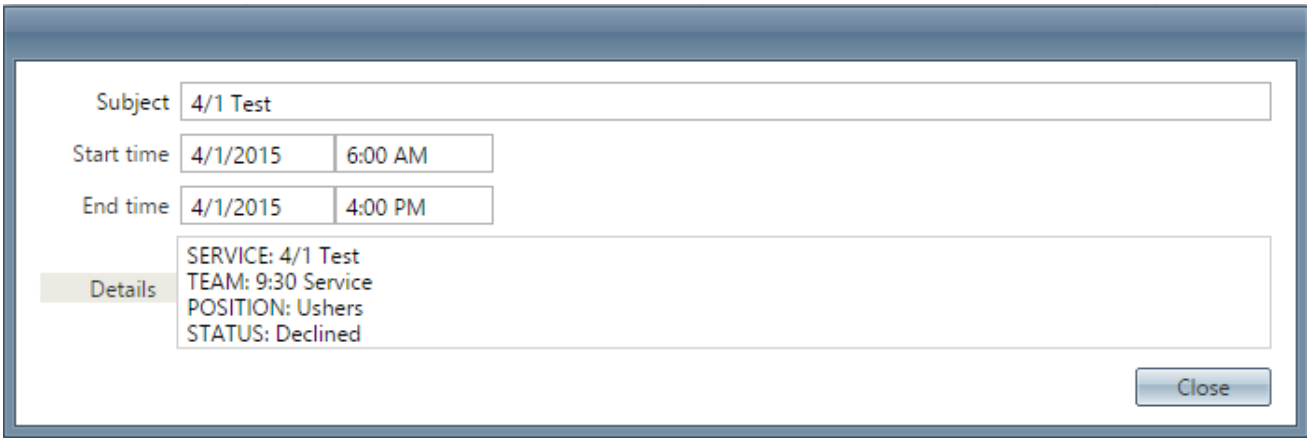




Double clicking on a blackout date loads the blackout date information pop-up.

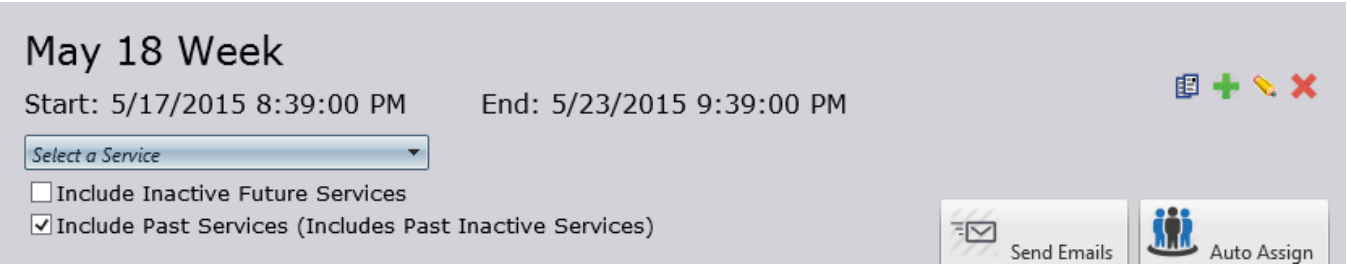
Notice that a blackout date covers from 12:00 AM until 11:59 PM.

Double Clicking on a service date loads the service information pop-up.



Service Header

The **Service Header** displays basic information about the service and has several options.



The **Service Name** assigned displays at the top in a large font with the **Start Date** and **End Date** listed under it.

The icons in the upper right-hand corner allow you to copy, add, edit, and delete a Service.

- Click the **Copy Service** icon to make a copy of the service listed in the Service Header.
- Click the **Add New Service** icon to display a pop-up window to enter information for a new service.
- Click the **Edit Service** icon to edit the service listed in the Service Header. You can only edit a future Service.
- Click the **Delete Service** icon to delete the service listed in the Service Header.

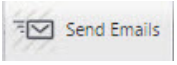
The Select a Service drop-down controls which service displays on the Service Header.

The two check box options control which services are included on the Calendar.

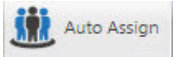
Select the Include Inactive Future Services check box to highlight those dates in light blue on the calendar.

Select the Include Past Services check box to highlight those dates in grey on the calendar.

The two buttons in the lower right-hand corner give the ability to send emails and automatically assign volunteers to the selected service.

Click the 

button to send an email to all volunteers listed on the Service grid.
Click the button to automatically assign all the volunteers needed for the **Service** or to fill in additional volunteers needed up to the total needed for the service. See the following section for an explanation of how the **Auto Assign** button works.

Click the 

button to automatically assign all the volunteers needed for the **Service** or to fill in additional volunteers needed up to the total needed for the service. See the following section for an explanation of how the **Auto Assign** button works.

Auto Assign Button Logic

Click the **Auto Assign** button to assign your volunteers for the Service selected automatically. There may be occasions where you need to manually assign specific volunteers for a Service. For example, you need a total of 10 volunteers. You have three people you want to manually assign

to the Service and seven positions remaining that you want to Auto Assign. The logic to find potential volunteers using the **Auto Assign** button is as follows:

- Find people in the Service Tag that do not have a black out date on the Service date and have met pre-requisites (if required) and are not already on schedule on the Service date.
- From the resulting list of Volunteers, they must not have a pending or accepted status on the service date and not be pending or accepted for a Volunteer position on another team.
- The resulting list of Volunteers is sorted in reverse order by the date they last served. This Auto Assigns the Volunteers who have not served recently.

If the resulting list from the above logic does not meet the total requested number of Volunteers for the Service then the following logic occurs:

- Add a person to the Service Team with a status of pending and the Email Date Sent set to blank.

Select a Service

The **Select a Service** drop-down controls which service displays on the Service Header. The **Select a Service** drop-down displays the current calendar month's services plus the next two months for a total of three months of services. **Past Services** and **Inactive Future Services** display if those check box options are selected.

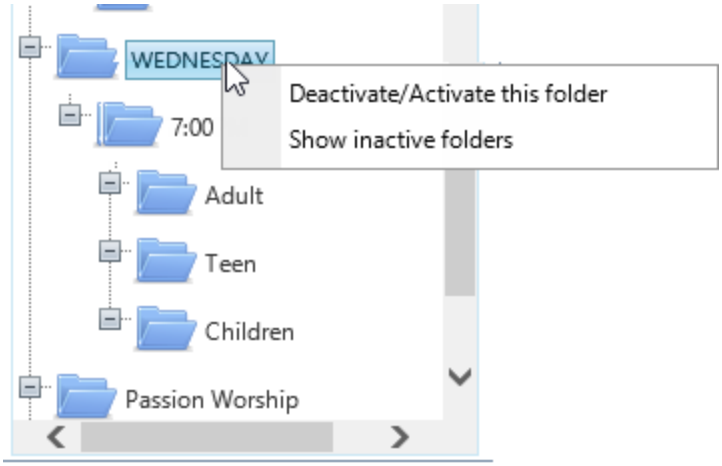
The two check box options control which services are included on the **Calendar** and the **Select a Service** drop-down.

Select the **Include Inactive Future Services** check box to highlight those dates in light blue on the **Calendar** and the **Select a Service** drop-down.

Select the **Include Past Services** check box to highlight those dates in grey on the **Calendar** and the **Select a Service** drop-down.

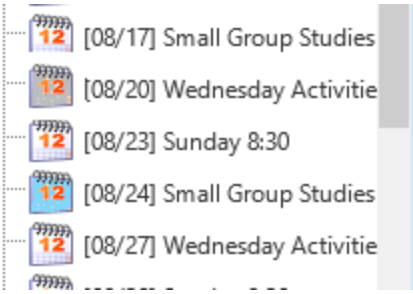
The **Select a Service** drop-down displays a tree view of your Service Folders. The **Active Folder** icon represents an active Service folder. The **Inactive Folder** icon represents an inactive Service Folder and also has "(inactive)" listed with the folder name. To **Activate** or **Deactivate** a folder, right-click on the folder name and select **Deactivate/Activate** this Folder. To display inactive folders. right-click on any folder name and select **Show inactive folders**.

Use the horizontal scroll bar at the bottom of the Service Folder tree view to see large Service Folder structures.



The **Active Calendar** icon represents all active Service opportunities for the current month and the following two months. The **Inactive Future Calendar** icon represents all inactive future Service opportunities for the current month and the following two months. The **Past Services Calendar** icon represents all Past Service opportunities. The **Inactive Future Services** and **Past Services** display only if the check boxes are selected on the Service header.

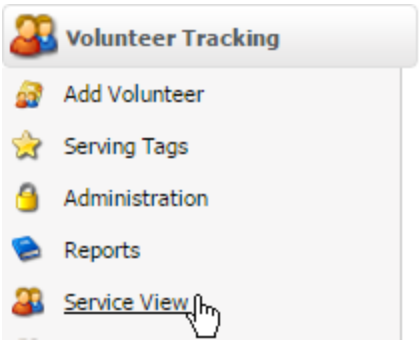
When a new Service is created the date is automatically appended in brackets to the beginning of the Service Name. This alleviates the need to add a date to the Service Name.



Add a Service

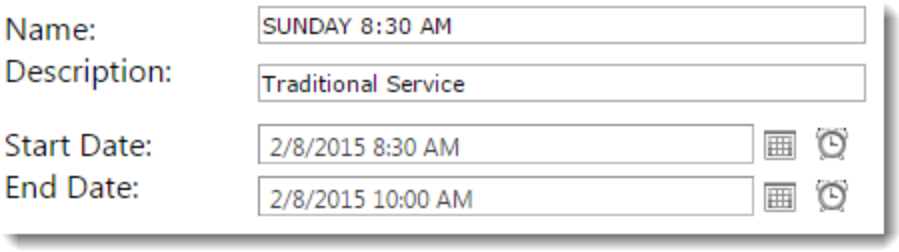
Below are the steps for setting up a Service and assigning volunteers.

1. From the **Volunteer Tracking** menu, click the **Service View** option.



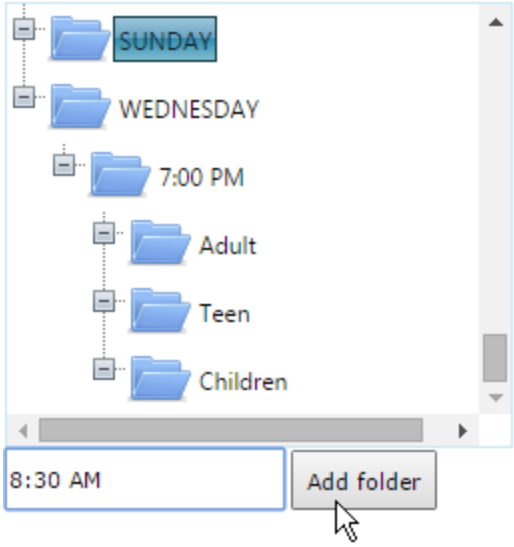
2. Click the **Add New Service** icon located on the upper right-hand corner of the Service Header.

3. Enter the **Name**, **Description**, **Start Date** and **End Date**.



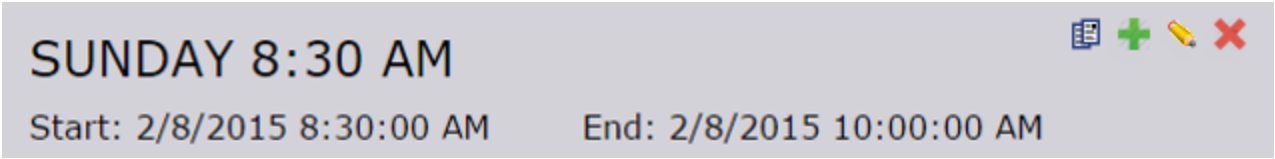
4. The services are organized by folders. Type the folder name and click the **Add Folder** button.

5. Type the sub-folder name then click the **Add Folder** button.

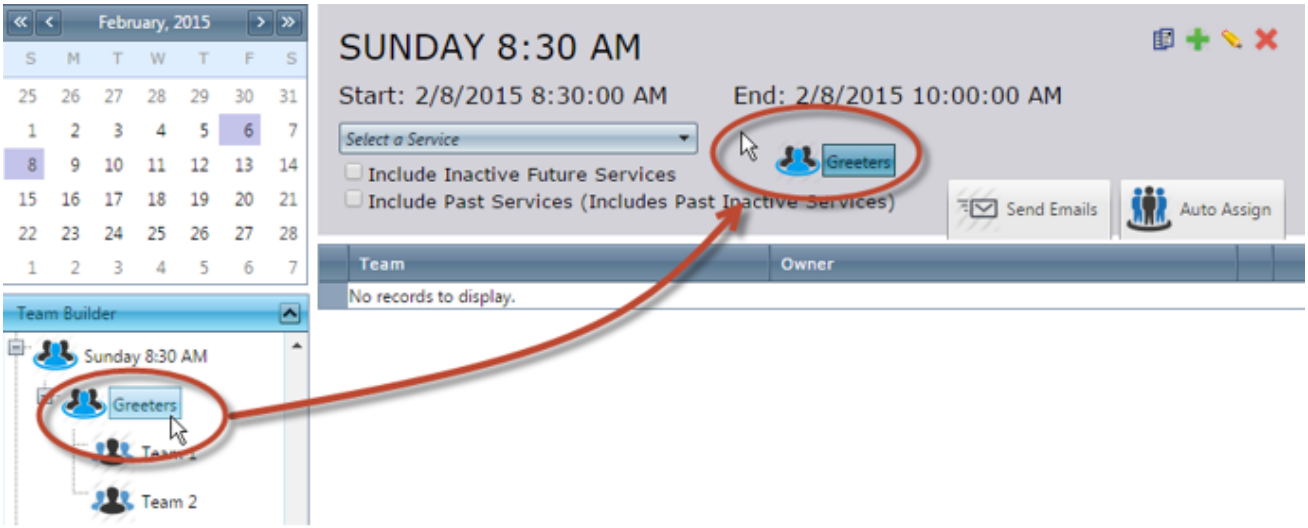


6. Click the **Ok** button when after reviewing the Add New Service window.

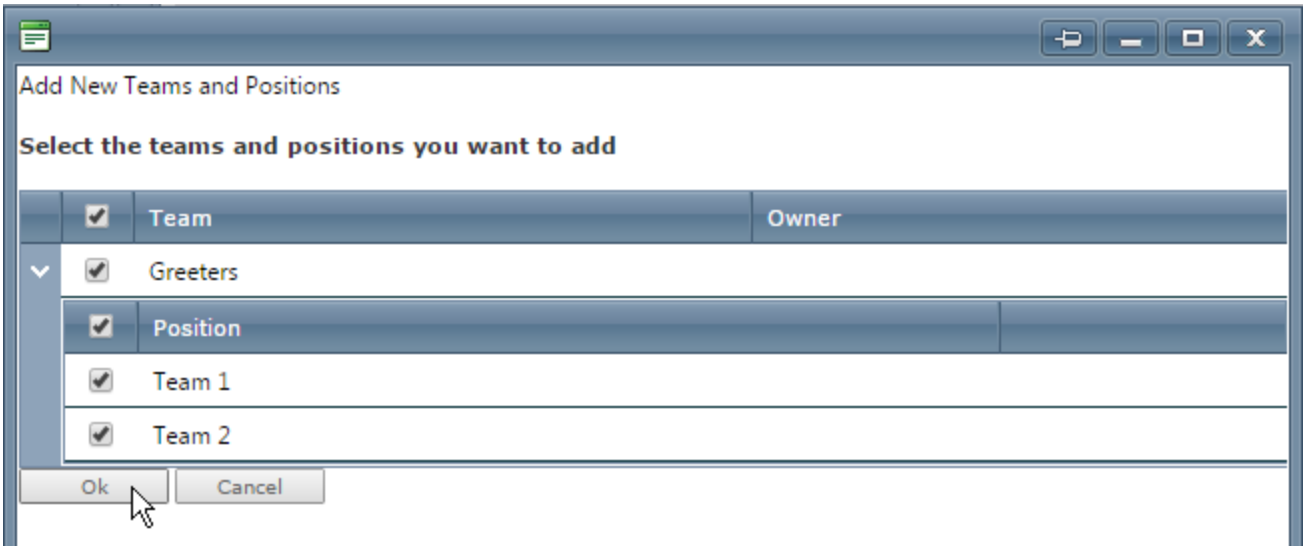
Notice that the new service is now showing in the Service Header. Also, the **Service Date** is appended to the **Service Name** in the **Select a Service** drop-down.



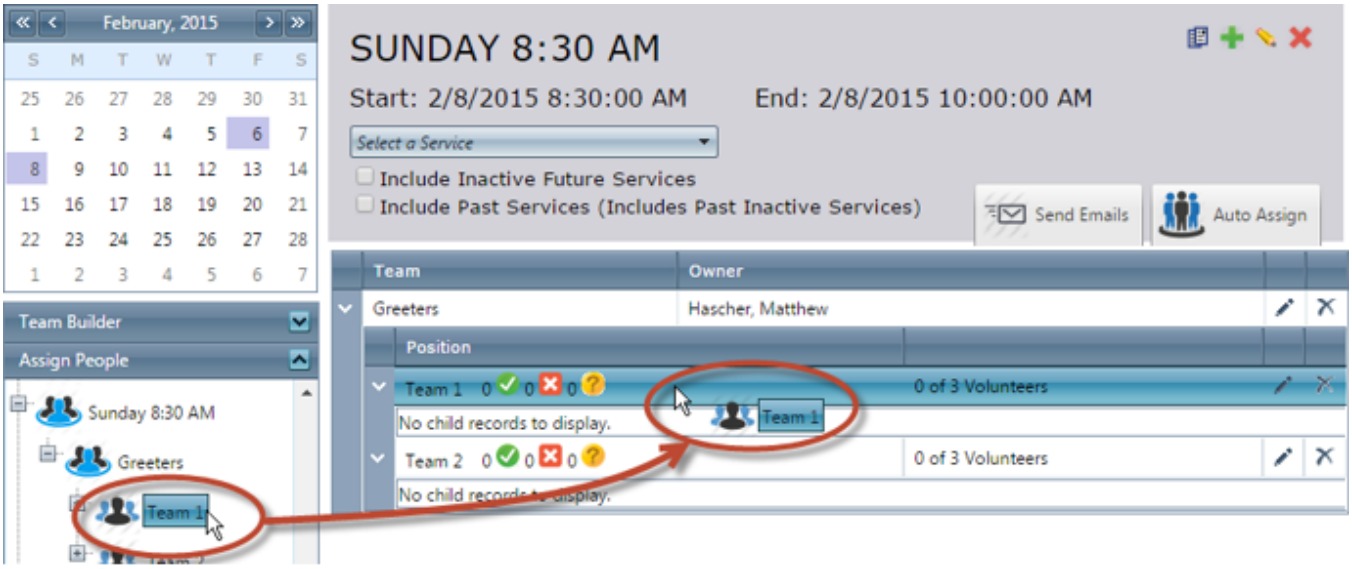
7. From the **Team Builder** box, click a level and drag it to the Service Header.



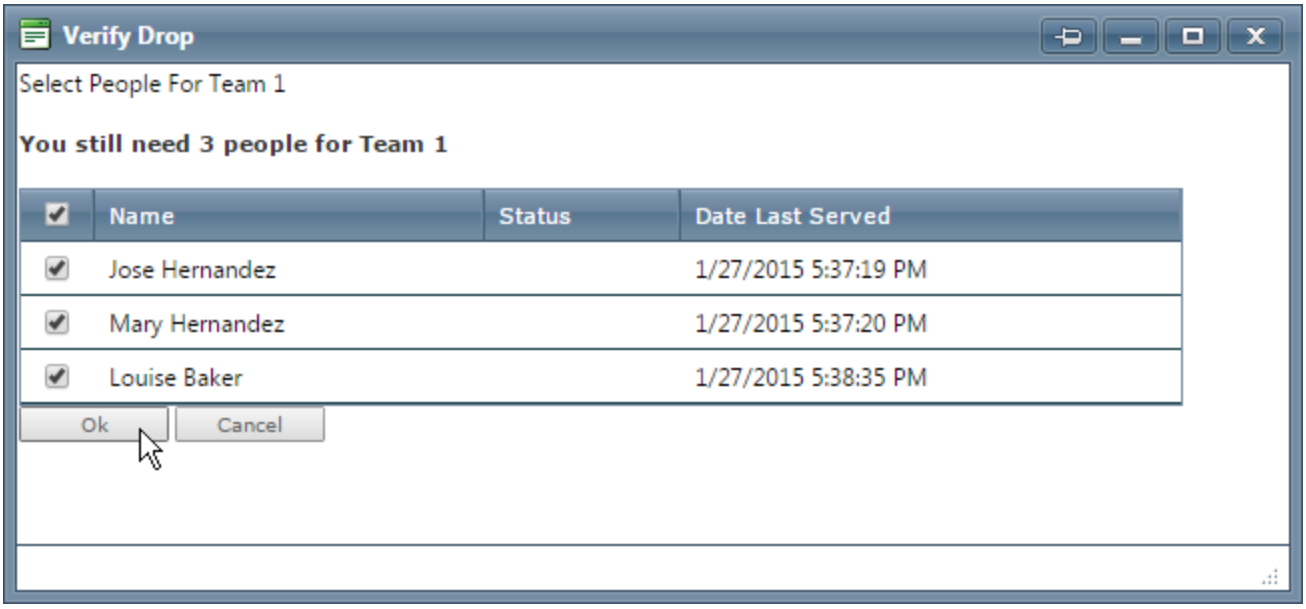
8. A Confirmation message appears which allows you to select and deselect teams and positions. Click the **Ok** button to continue.



9. From the **Assign People** box, click a team and drag it to the **Position** header.

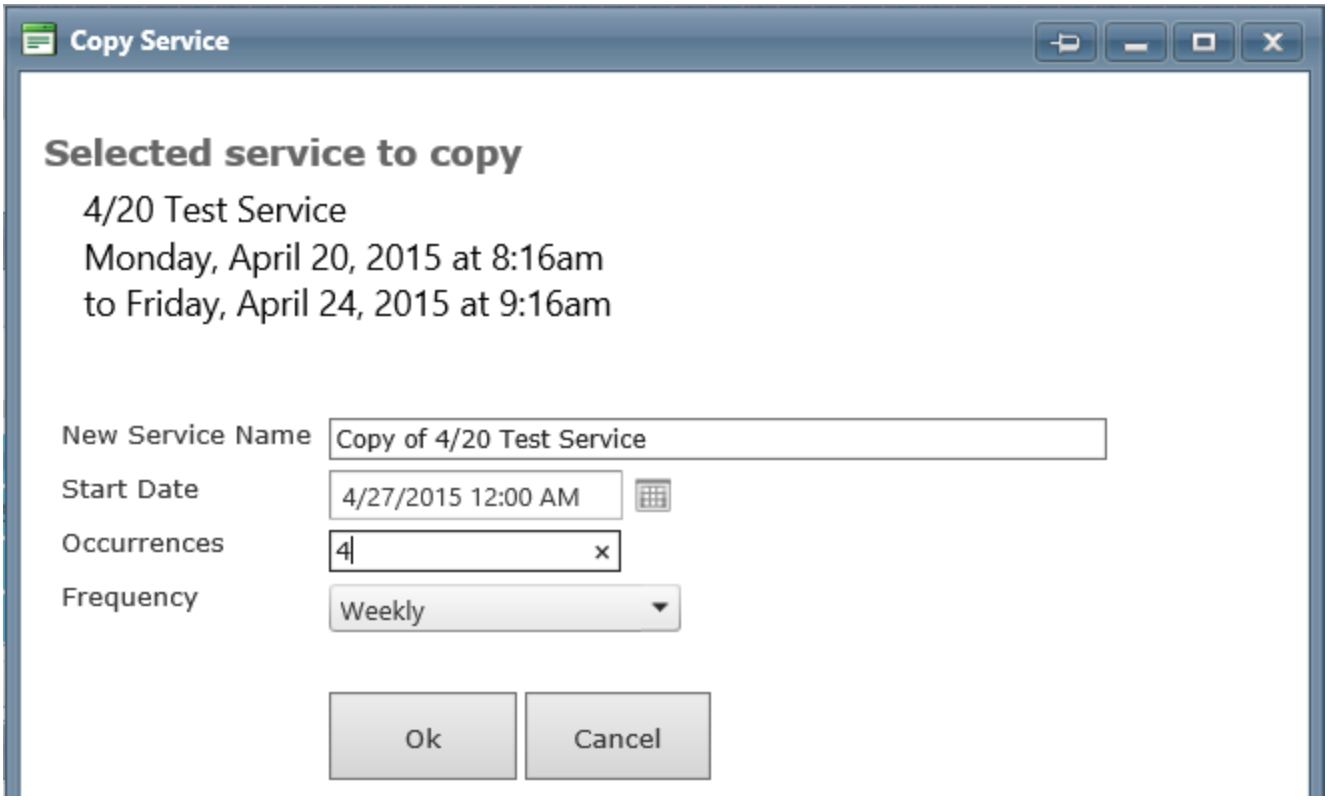


10. A Confirmation message appears which allows you to select and deselect records. Click the **Ok** button to continue.



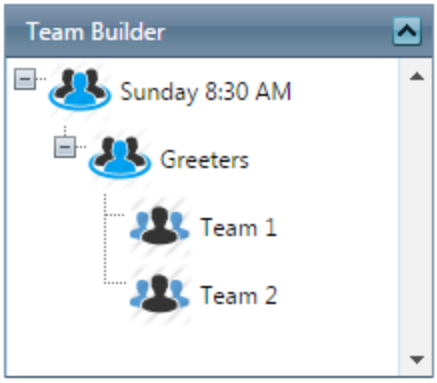
Copy a Service

Click the **Copy** icon available on the Service header to copy a Service . You use the original service as a template. A new start date can be entered for the new service to begin on, the number of occurrences to create, and at what frequency to create them. The copied services use identical number of days, start times, and end times as the original service. Up to 100 services can be coped using **Copy Service**.



Team Builder

The **Team Builder** box displays **Service Tags** as team levels. The team levels can be assigned to Services.



The **Folder level** icon represents a **Service Tag** that has levels assigned under it.

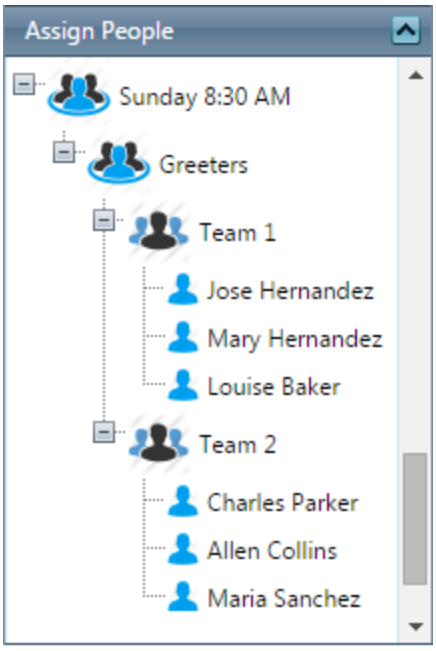
The **Team level** icon represents a **Service Tag** that has records assigned under it.

Click and drag the **Folder level** icon or the **Team level** icon to the **Service Header** to assign the level to a Service.

Assign People

The **Assign People** box displays **Service Tags** as team levels and displays the volunteers assigned to those levels. Use the horizontal scroll bar at the bottom of the Assign People tree view to see large Team structures.

Both the team levels and the volunteers can be assigned to Services.



The **Folder level** icon represents a **Service Tag** that has levels assigned under it.

The **Team level** icon represents a **Service Tag** that has records assigned under it.

The **Volunteer** icon represents a **record**.

Assign a team or an individual volunteer to a Service by clicking and dragging the **Folder level** icon, **Team level** icon, or the **Volunteer** icon to a position located on the **Service Grid**. You can also click the Auto Assign button to automatically assign qualified serving tag members to the Service.

Qualified serving tag members are:

- Volunteers in a serving tag that do not have blackout dates on a service date.
- Volunteers that have met all prerequisites.
- The volunteer must not be already on schedule on the specific service date.
- Volunteer has no pending or accepted status on the service date.
- Volunteer has not already accepted or is pending another volunteer position.

All qualified candidates are assigned in reverse order by the date last served.

Service Grid

Use the **Service Grid** to manage **Teams**, **Positions** and **Volunteers** for a specific **Service**. A temporary one-time use **Team** and **Position** can be added from the Service Grid. Manually **Accept** or **Decline** a volunteer from the grid.

The **Indicator** icons display for the following reasons:

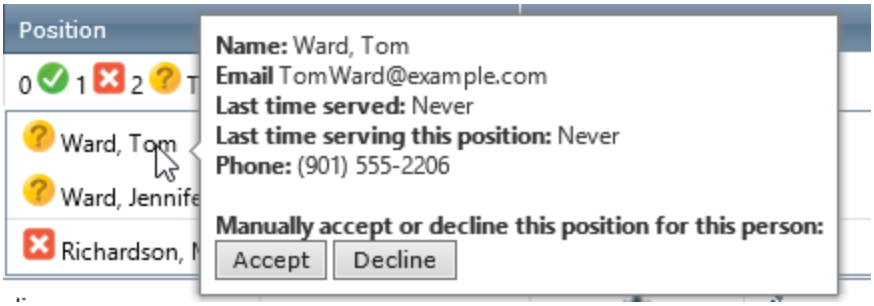
- **Accepted** icon displays the number of volunteers who have accepted.
- **Rejected** icon displays the number of volunteers who have declined.
- **Pending** icon displays the number of volunteers who have not responded or their response is unresolved.
- The **Email** icon next to a name indicates the volunteer has an email address.
- The **Cancel** icon next to a marked through name indicates the volunteer has been canceled.
- The **Not Valid Email** icon next to a name indicates the email address is not valid.

The **Action** icons perform the following functions:

- Click the **Add New** icon to add a new Team, Position, or Team Member (Volunteer).
- Click the **Edit** icon to edit a team or position.
- Click the **Delete** icon to remove a Team, Position or Volunteer.
- Click the **Email** icon to send a volunteer request email. The volunteer can then respond to the email by accepting or rejecting their availability for the specific Service.
- Click the **Cancel** icon to cancel a Volunteer.

Manually Accept of Decline a Team Member (Volunteer)

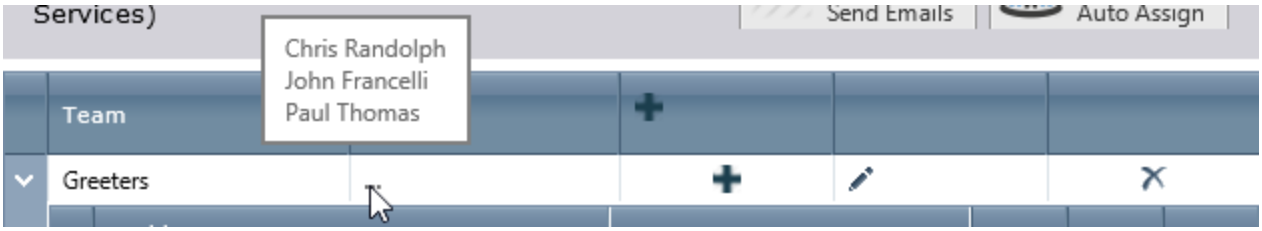
Hover over a Team Member's name to display a popup window with information about the Volunteer. Click the Accept or Decline button to manually **Accept** or **Decline** a Service Opportunity. This is especially useful if the Volunteer gives you the information verbally or is unable to respond to the request email.



Edit a Team

After a Team is created it may be necessary to make changes to the Team. Click the **Edit** icon on the Team header bar to display the **Team Settings** window. Update the **Name** and **Description** as needed. Click the ***Add*** link to display the **Popup Person Search** window to search and select an Owner(s). Multiple Team Owners can be selected and are added to the email notification process. Click the **Delete** icon to remove an **Owner**. Click the Update button to save the changes and return to the Service View grid. Click the Cancel button to return to the Service View grid without saving the changes.

If you selected multiple **Team Owners**, an **Ellipsis** icon displays on the **Team** header bar. Hover over the **Ellipsis** icon to display a tip listing the **Team Owners**.

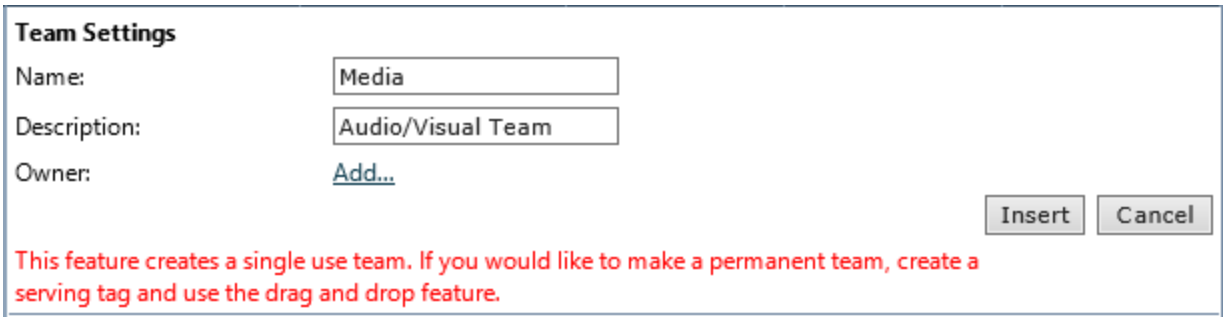


Add a One-Time Use Team and/or Position

Add a new **Team** and **Position** from the Service Grid. This process does not create a Serving Tag but allows you to quickly create a Team and Position without having to create a Serving Tag first.

Keep in mind this creates a **single use Team and Position**.

1. Click the **Add New Team** icon located on the Team header bar to display the Team Settings window.



2. Enter a **Name** and **Description** for the Team. Click the ***Add*** link to display the Popup Person Search window. Search and select the Team Owner(s). Click the **Delete** icon to remove a selected **Owner**.

3. Click the Insert button to save the Team and add the Team to the **Service View** grid. Click the Cancel button to return to the Service View grid without saving the new Team.

4. Click the **Add new Position** icon located on the **Team** header bar you just created to display the **Team Profile Settings** window.

5. Enter the **Name**, **Volunteers Needed**, and **Reminder Days**. All three fields are required. Select the **Allow Sign Ups** check box to enable Volunteers to sign up via the web portal. This

is the only option allowed for single use team positions.

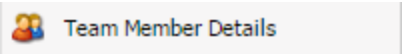
6. Click the **Update** button to add the **Team Position** to the **Service View** grid. Click the **Cancel** button to return to the **Service View** grid without saving the new position.

7. Click the **Add New Team Member** icon to display a blank grid to add Volunteers to the new team. NOTE: The **Auto Assign** option is not available for single use Teams and Positions. Click the ***Change*** link to display the Popup Person Search window to search and select Volunteers. Each Volunteer selected will be listed in the Volunteer field box. Click the Insert button to add the Volunteer(s) to the Team. Click the Cancel button to return to the **Service View** grid without adding the Volunteers.

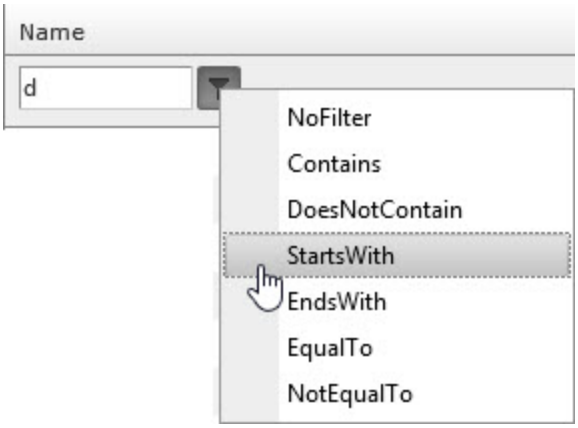
8. After adding the single use **Team**, **Position**, and **Volunteers** continue the same process for contacting the Volunteers to accept or decline the Service opportunity.

Team Member Details

The **Team Member Details** page allows you to view your volunteers in a grid and filter by Name, Team, Service, and Status. After filtering your volunteers, there are options to export to Excel, PDF, CSV, and Word.



To narrow your list results, enter all or part of a Name, Team, or Service then click the **Filter** icon. The grid refreshes with the results. You can also select a filter option from the drop-down list for a more specific filter. For example, to find all Team Members whose name begins with "D", enter "d" in the Name field then select "StartsWith" for the filter.



To filter by Status, click the **Status** drop-down and select a status. The Team member grid refreshes with the results.

Additional button options are:

- **Refresh** Refresh button: Click the **Refresh** button to update the Team Member grid results after changing any filters.
- **Export to Excel** icon: Click the **Excel** icon to download and open an Excel spreadsheet of the names on the current grid page. The file contains the following: Name, Team, Service, and Status.
- **Export to PDF** icon: Click the **PDF** icon to display a PDF view of the names on the current grid page in your browser window. To exit the PDF view, use your browser Back button to return to the Team Members Details page.
- **Export to CSV** icon: Click the **CSV** icon to download and open a CSV file in your current spreadsheet program with the names on the current grid page. The file contains Name,

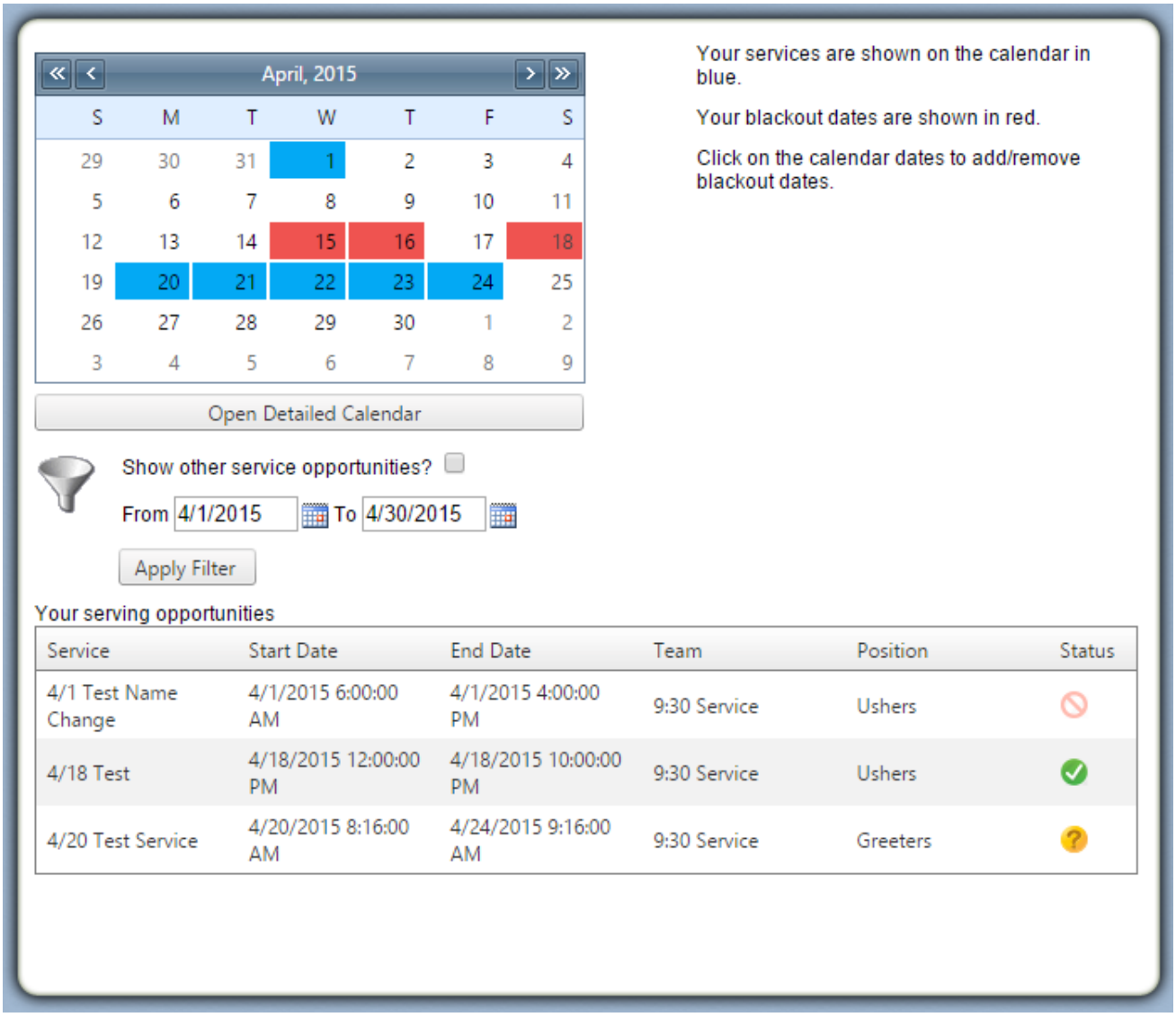
Team, Service, and Status.

- **Export to Word** icon: Click the **Word** icon to open a Word document with the names on the current grid page. The document contains Name, Team, Service, and Status.

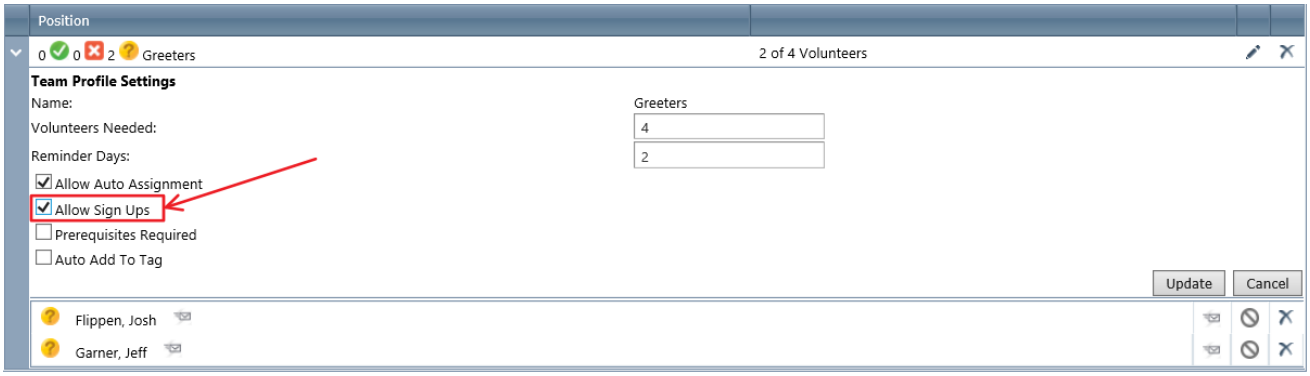
At the bottom of the grid, page navigation allows you to move quickly to other pages in the list. Click a **Page Number** to go directly to another page or click the **Page Navigation Arrows** to move page by page. Click the **Page Size** drop-down to change the number of records listed on the grid.

Service View Web Portal

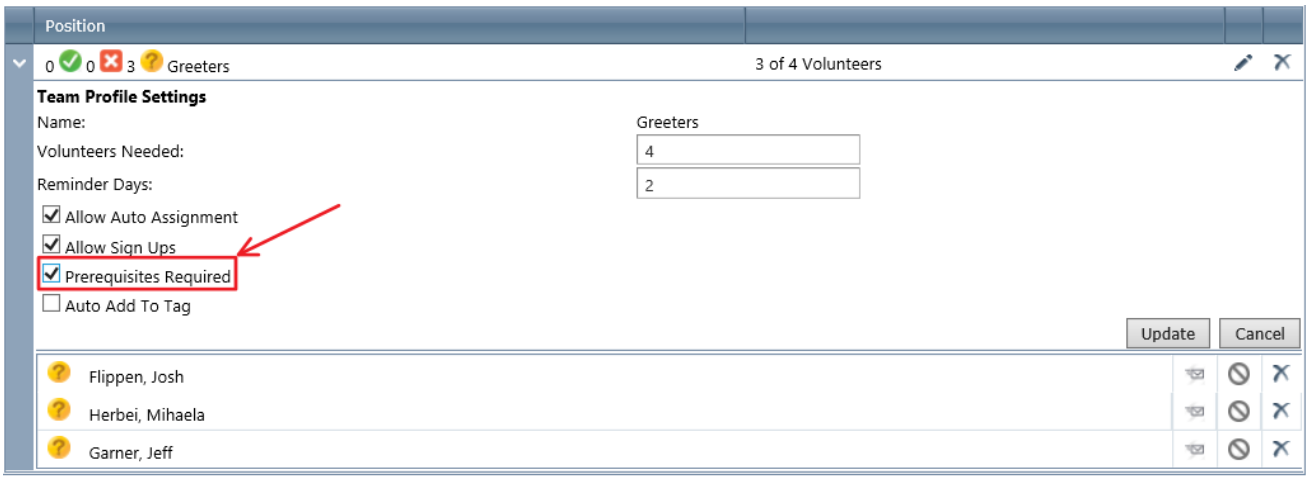
The Arena Web Portal now has a Service List View page where church members can manage their service opportunities, add blackout dates, and sign up for available service opportunities.



For services to display in the Serving Opportunities data display, the service position must be marked to Allow Signups. Click the **Edit** icon for a position to select the **Allow Sign Ups** check box in Arena (portal 1).



Positions marked as **Prerequisites Required** require that the volunteer signing up for a position to be marked on the service's serving tag as prerequisites being met on the Tag Member Details.

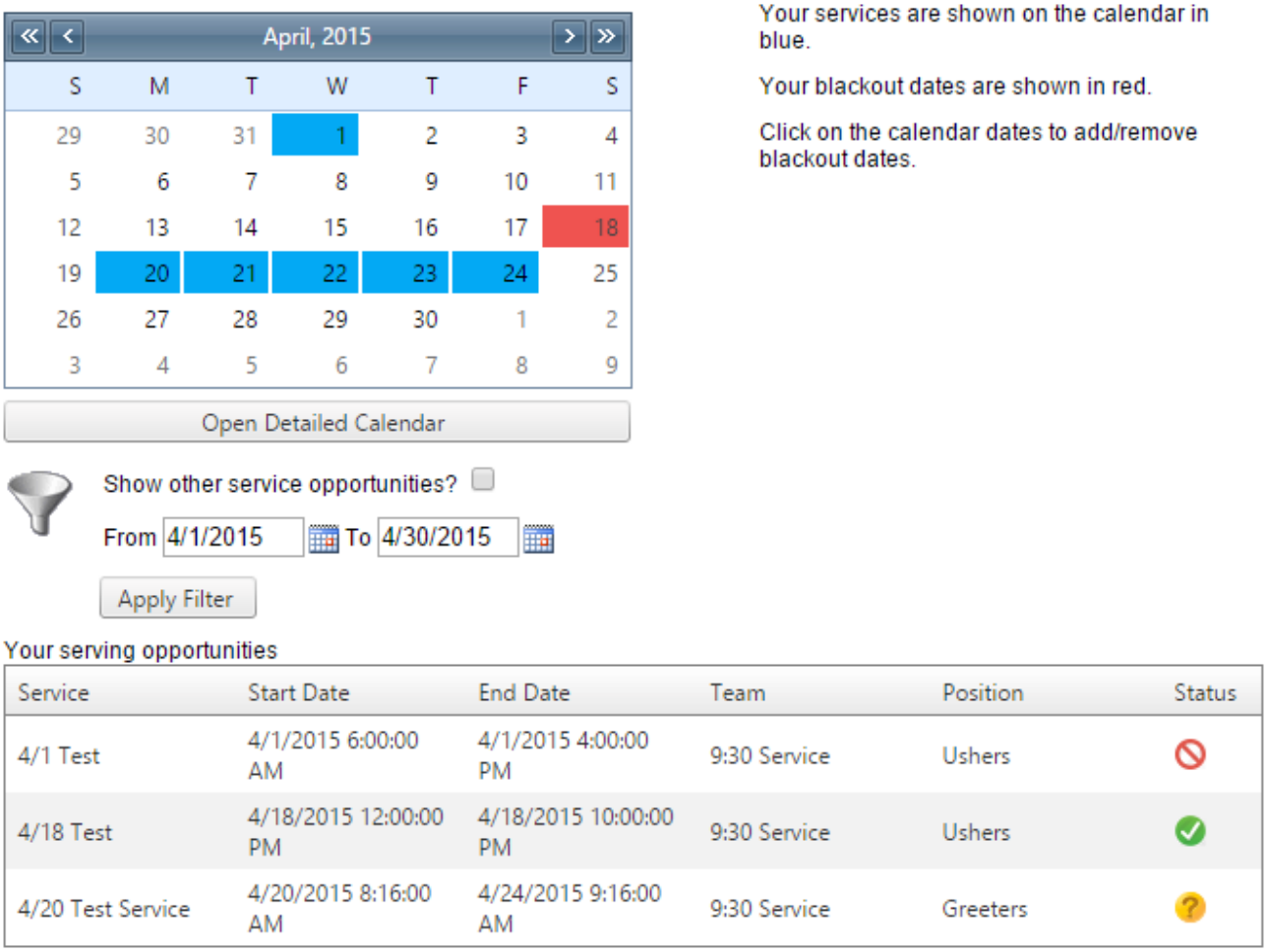


If a service is marked **Prerequisites Required** and a user attempts to sign up for the service but they have not been marked as having met the serving tag prerequisites, they receive an error message on the Save Member pop-up and the **Ok** button is disabled.

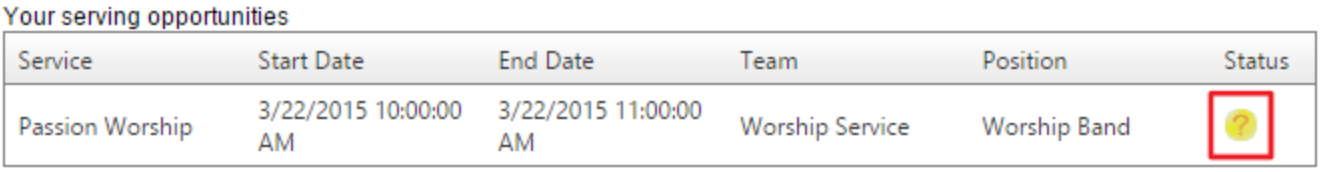
When this volunteer record is saved, there is an email notification automatically sent to the serving tag owner.

Service List Web Portal

The **Service List View** page is available on the web portal under the Member's section, under the **Volunteer Opportunities** menu section. When the page first loads it looks like the following:



The calendar and the **From** and **To** dates on the filter shows the current month when the page first loads. The calendar shows all services for the current month. Any service that is a past service has disabled status icons. (, , , or).

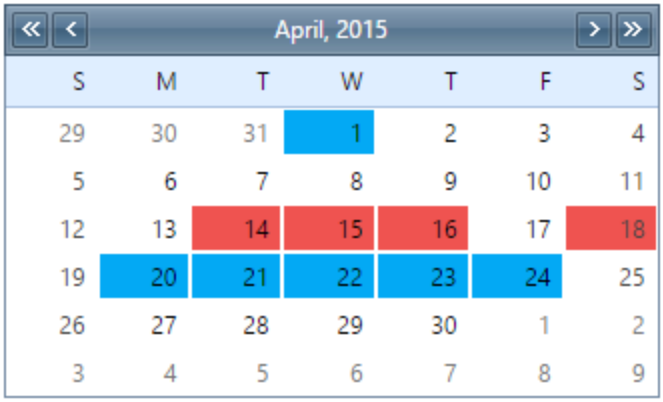


The calendar displays days for services or days that have been marked as blackout dates. Service days are highlighted in blue on the calendar. Blackout dates are highlighted in red on the calendar.

Managing Blackout Dates on the Web Portal

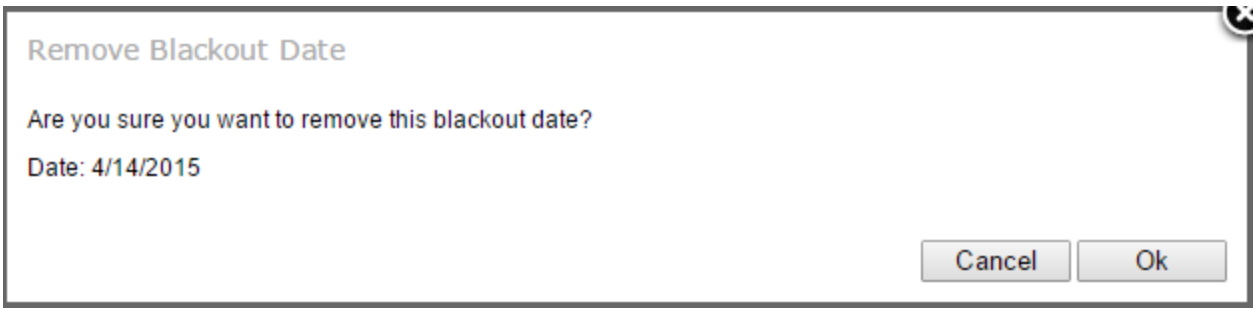
Add a Blackout Date

To add a blackout date to the calendar, click on the day on the calendar you want to add a blackout date to. On the **Add Blackout Dates** pop-up the **Start Date** is automatically populated. Click the **Calendar** icon to select the End Date or enter it manually. This date can be the same as the start date or a date in the future. Using a different End Date than the Start Date highlights multiple days on the calendar.



Removing a Blackout Date

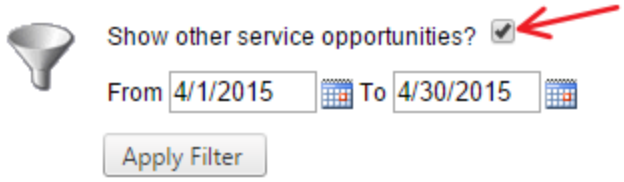
To remove a blackout date, click on the existing blackout date on the calendar, which displays the **Remove Blackout Date** pop-up.



Click the **Ok** button to remove that blackout date. This only removes the blackout date from the selected day. Blackout dates that were set up using multiple days need to be removed individually.

Service Opportunities on the Web Portal

To view available service opportunities (service opportunities that have the **Allow sign up** option enabled), set the **From** and **To** dates on the filter and select the **Show other service opportunities?** check box, and then click the **Apply Filter** button.



This loads the **Serving Opportunities** data grid.

Serving opportunities

Service	Start Date	End Date	Team	Position	Sign Up?
4/18 Test	4/18/2015 12:00:00 PM	4/18/2015 10:00:00 PM	9:30 Service	Greeters	
4/18 Test	4/18/2015 12:00:00 PM	4/18/2015 10:00:00 PM	9:30 Service	Parking Lot	
4/20 Test Service	4/20/2015 8:16:00 AM	4/24/2015 9:16:00 AM	9:30 Service	Greeters	

Click the **Sign Up** icon to sign up for an available service opportunity. This displays the **Save Member** pop-up.

Click the **OK** button to remove that listing from the Serving Opportunities data grid and add the volunteer to the team position for that service, which now displays in the **Your Serving Opportunities** data grid.

Your serving opportunities

Service	Start Date	End Date	Team	Position	Status
4/1 Test Name Change	4/1/2015 6:00:00 AM	4/1/2015 4:00:00 PM	9:30 Service	Ushers	
4/18 Test	4/18/2015 12:00:00 PM	4/18/2015 10:00:00 PM	9:30 Service	Ushers	
4/20 Test Service	4/20/2015 8:16:00 AM	4/24/2015 9:16:00 AM	9:30 Service	Greeters	

If the option to **Auto Add To Tag** has been enabled and the user is not already a member of the serving tag for this service opportunity, the user is added to the serving tag.

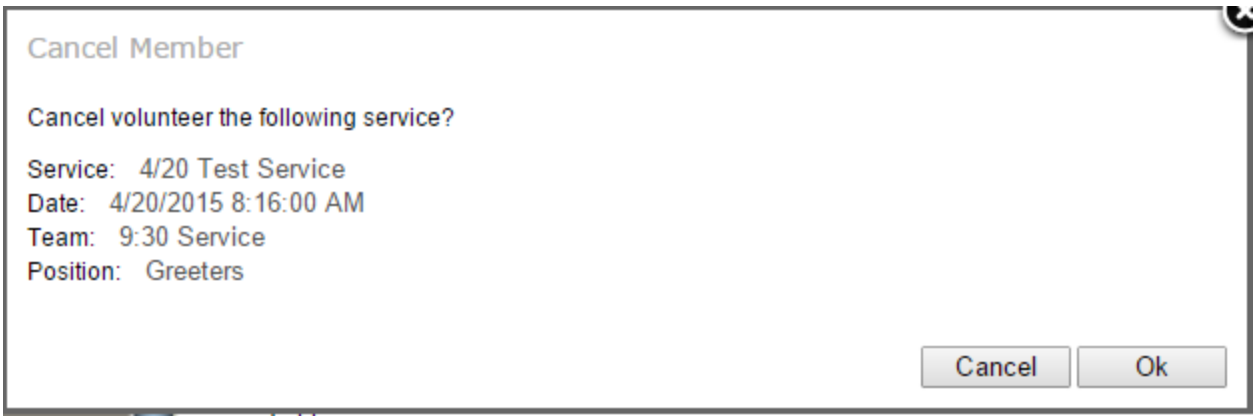
Changing the Status of Serving Opportunities

Clicking the current status icon of any future service listed in the **Your serving opportunities** data grid to change the status. All past services have disabled icons and cannot be changed.

When clicking on a service status icon with a pending status, the user gets a pop-up asking them to Accept or Reject the service opportunity.

Click the **Accept** or **Reject** button to update the volunteer for the service opportunity and change the icon to match the response.

When clicking on a service status icon with an accepted status, the user gets a pop-up asking them if they want to **Reject (cancel)** the service opportunity.



Click the **OK** button to update the volunteer for the service opportunity and change the status to Rejected.

When clicking on a service status icon with a rejected status, the user gets a pop-up asking them if they want to **Accept** the service opportunity.

Promotions

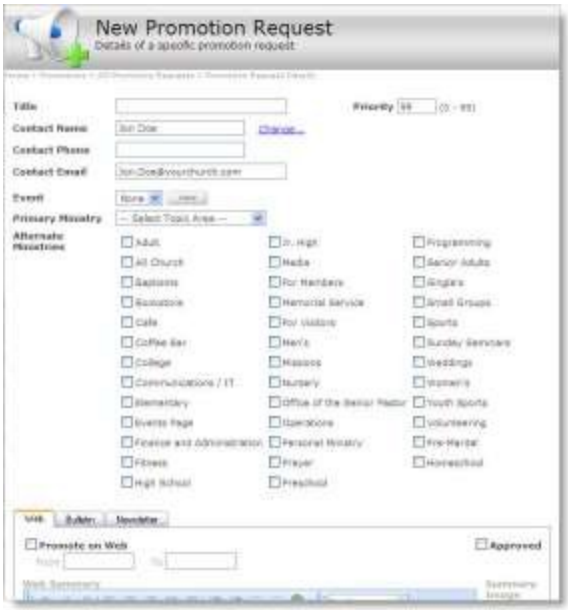
Promotions are upcoming events or announcements that Arena users want published, on your organization's Arena-managed website, as an entry within your organization's bulletin, or on your organization's newsletter or E-zine. Your Arena Administrator can implement an approval process so that supervisors have to approve requests made by Arena users before publication.

New Promotion Request

Use the **New Promotion Request** page to submit promotions. Your Arena Administrator likely has permissions set so that several staff can complete a promotion request and select staff to approve promotion requests.

Submit a New Promotion Request

1. From the **Promotions** menu, click the **New Promotion Request** option.
2. Complete all applicable fields.



- **Title** – Enter a title for the promotion.
- **Priority** – Enter the priority for the event. The priority is an option to determine which promotions to display on the Arena-managed web site and in what order, on a scale of 0 to

99 (0-99 is lowest to highest).

- **Contact Name, Phone and Email** – Enter the contact name for the event if the record does not exist in Arena database or click the ***Change*** link to select from existing records.
- **Event** – Verify the event displays in this drop-down. Click the **View** button to view the details of the Event.
- **Primary Ministry** – Select a Primary Ministry for this event. This determines where to display the promotion on your Arena-managed website.
- **Alternate Ministry** – If applicable, select alternate ministries. The Primary Ministry indicates the primary instance of the promotions module/control on your organization's Arena-managed webpage that this promotion displays on, while Alternate Ministries indicate any other instances of the promotions module/control that display this promotion if there is an empty spot available.

3. Select the **Web** tab.
4. Complete all fields, as desired.

- **Promote on Web** – Select this check box to display on the web.
- **From and To Dates** – Enter the dates the promotion should be available on your Arena-managed website.
- **Web Summary** – Enter a summary for the event. Use the HTML option to add any HTML formatting.

- **Summary Image** – Upload an image for the promotion.
- **Approved** – If available, approve the promotion. You can also approve promotions on the **All Promotions** page.
- **External Link** - If this event is a dedicated page, enter the respective URL.

5. Select the **Bulletin** tab.

6. Click the **Add Bulletin Request** button. Complete all fields, as desired.

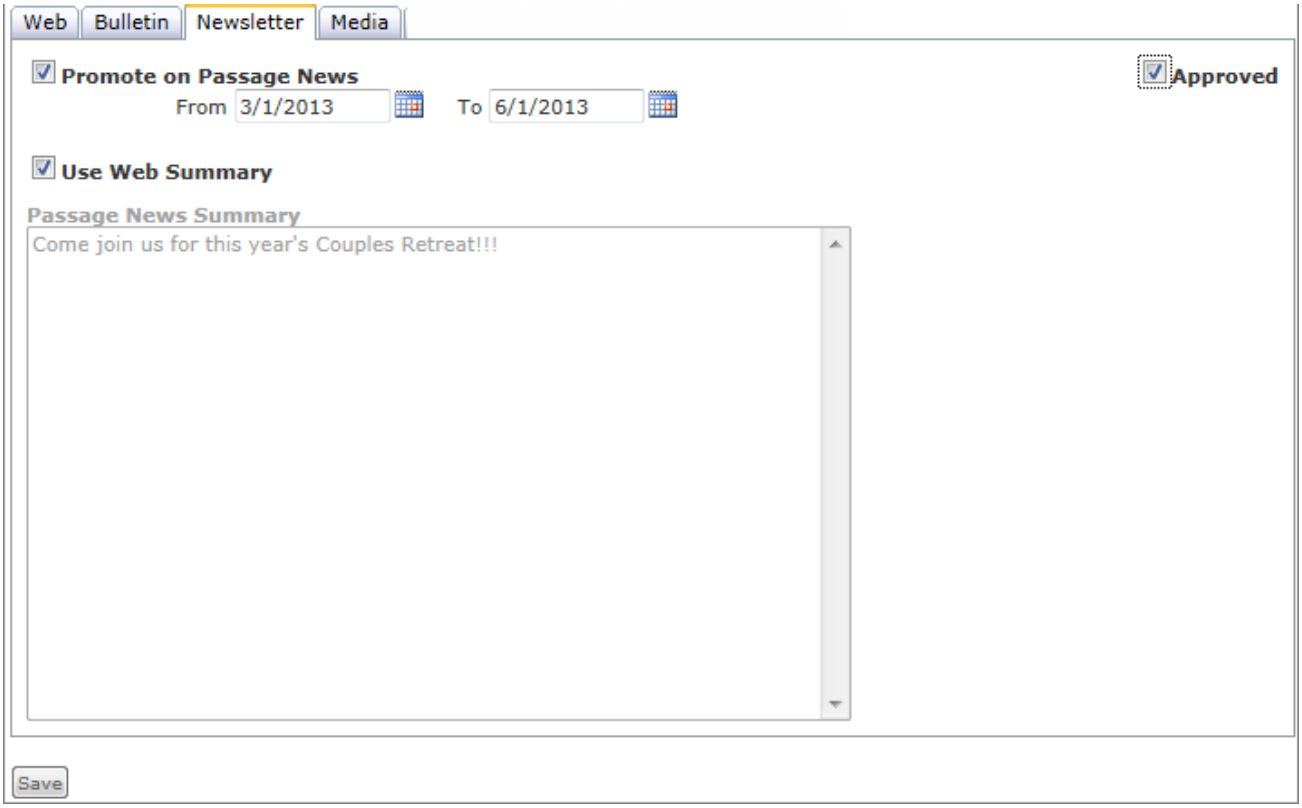
- **Date** – Select a date. Available dates are for Sunday and Wednesday. To customize see your Arena Administrator.
- **Summary** – Enter the promotion summary
- **Approved** – Check this box to approve.
- **Priority** – Set the priority.
- **Published** – Check this box to track bulletins you publish.
- **Child Care, Online Registration, Event Table** – Check the desired options for each bulletin promotion. This is a customizable Organization Setting. See your Arena Administrator for more information.

7. Click the **Delete** icon to delete a bulletin promotion.

8. Click the **Save** button.

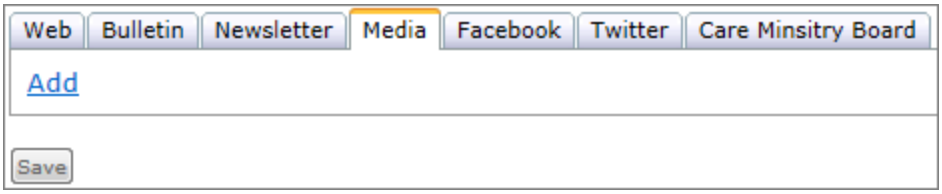
9. Select the **Newsletter** tab. You have the option to use the summary from the web tab or enter a new summary for newsletter.

10. Complete all fields, as desired.



- **Promote on <newsletter name>** - Check this box to enable.
- **From and To Dates** – Enter the date to begin and end the newsletter promotion.
- **Use Web Summary**- Check this box if you want to use the same summary from the **Web** tab. If you select this option, the web summary displays disabled in the summary section.
- **<Newsletter name> Summary**- If not using the **Use Web Summary** option, enter the newsletter summary.
- **Approved** – If available, select the **Approved** check box. This option is to enable an approval process.

11. Click the **Media** tab. This is a customizable tab.

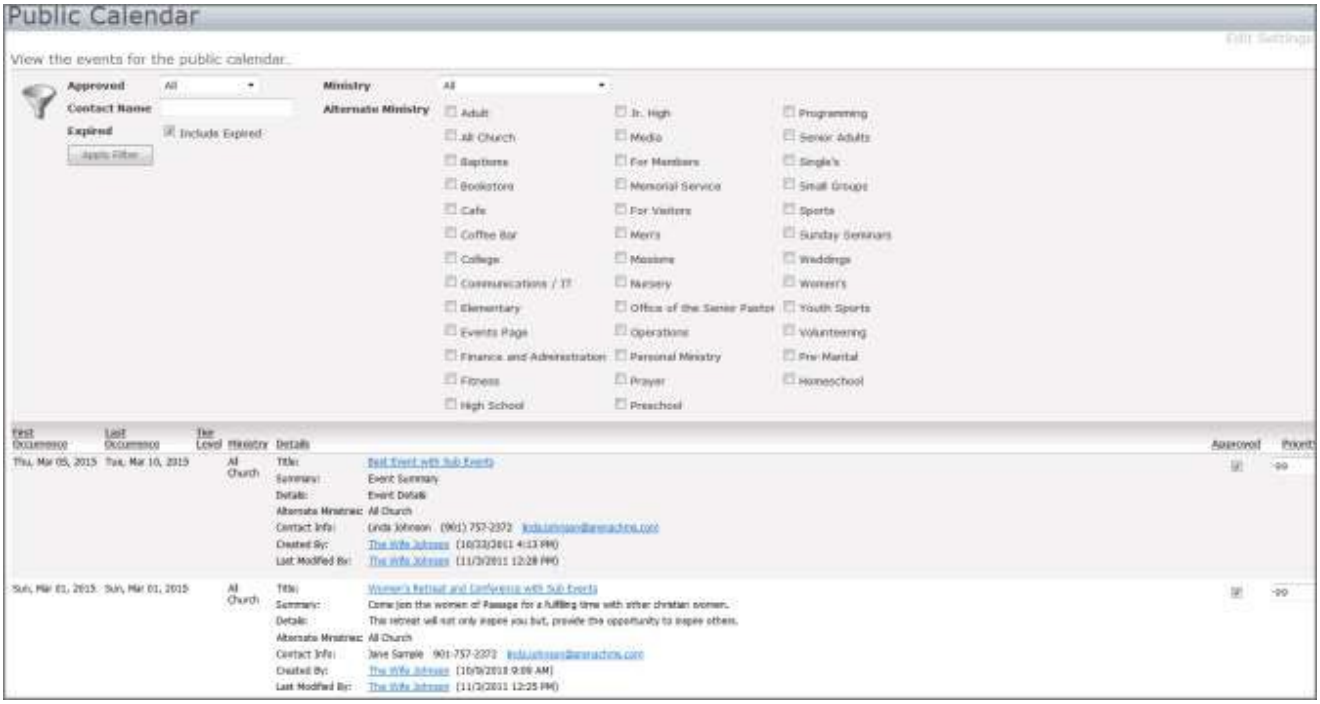


12. Click the **Save** button.

Public Calendar

The **Public Calendar** page displays all up-coming Events. Use the filters at the top of the page to display the desired items. The list displays the First Occurrence, Last Occurrence, Tier Level, Ministry (Topic Area), Details, Approved, and Priority. The Details column lists the Promotions with the title as a link to the **Promotion** page.

Click the **Save Changes** button to save any changes in the **Approved** or **Priority** columns.



Use the filters to display desired calendar requests.

Click the ***Title*** link to view the calendar request.

Select the **Approved** check box to approve the calendar request.

Click the **Save** button.

Web Requests

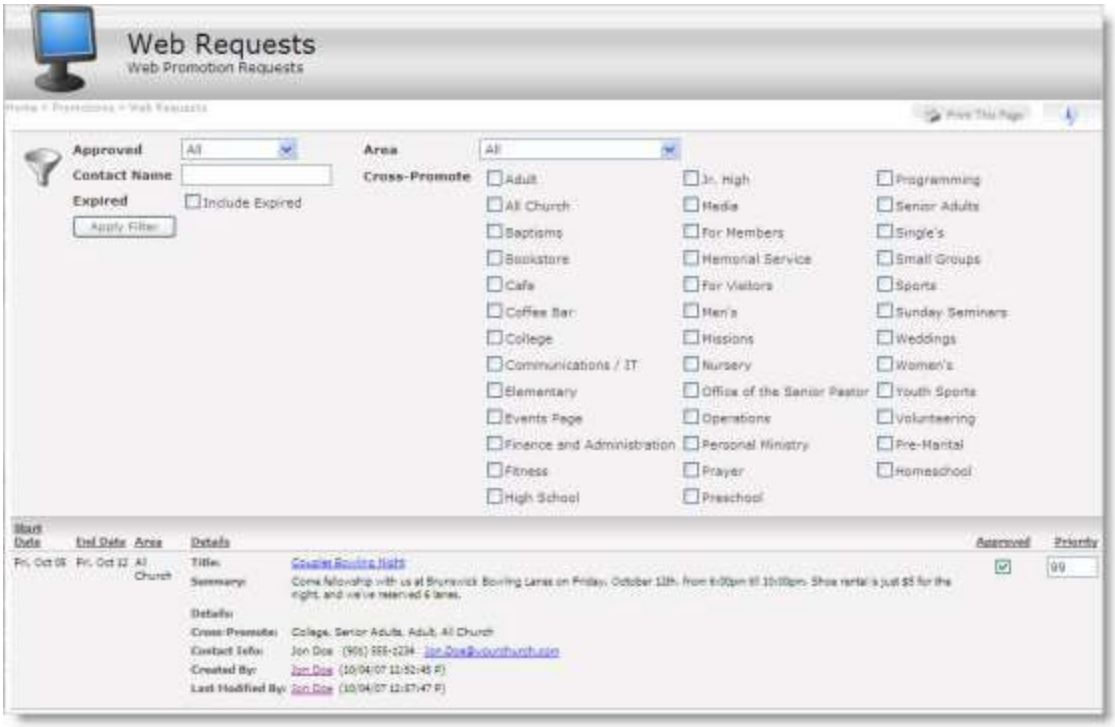
The **Web Request** page displays all **Promotions** entered with the **Promote on Web** option selected on the **Web** tab. This is a quick reference for approval of all web promotions.

Use the filters at the top of the page to display the desired items. Web requests display below the

filters with the relevant information. The **Web Request** page displays Starting and Ending Dates, Area, Details, Home Page option, Approval Status and Priority.

Click the ***Title*** link to open the entry.

Click the **Save Changes** button to save changes to the Approved or Priority columns.



Bulletin Requests

The **Bulletin Requests** page displays all Promotions entered with a Bulletin request item on the **Bulletin** tab. You can use this page as a quick reference for approval of all Bulletin Requests.

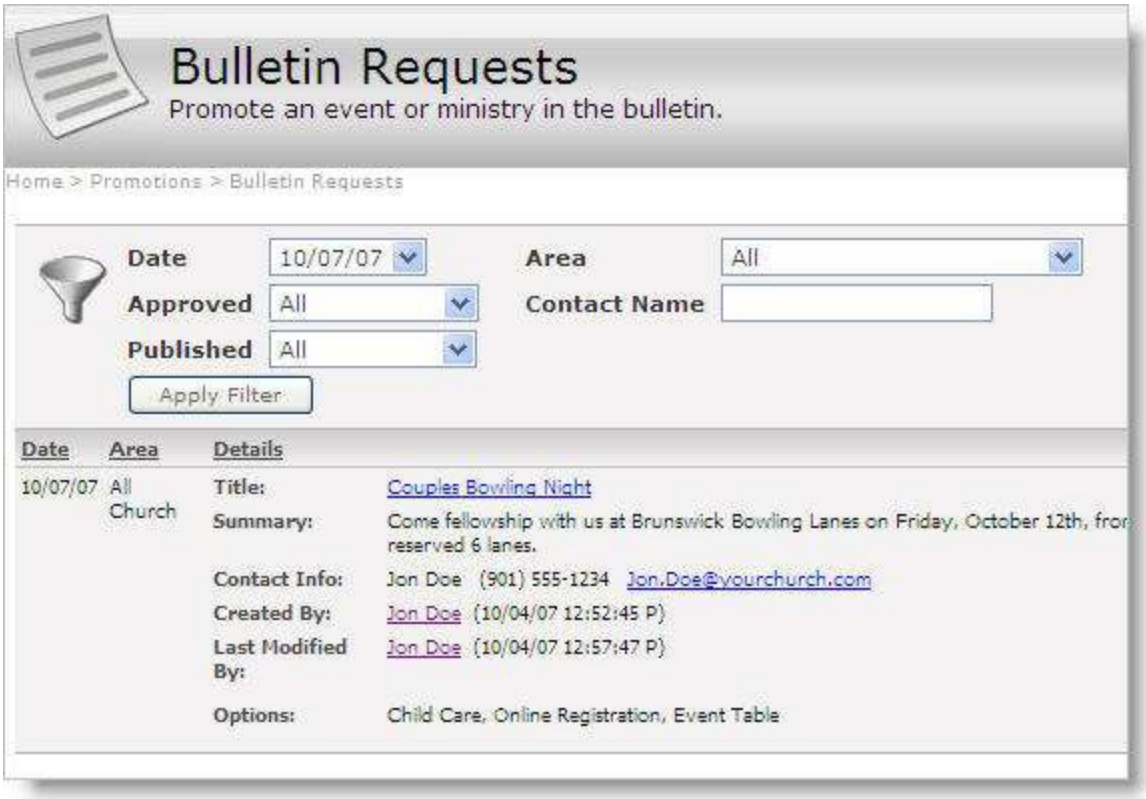
Your publishing staff should use this page to see what promotions should be included in a bulletin, as Arena does not publish the bulletin itself. Note that this view only shows Requests for publishing dates that have not occurred yet. To view previous Bulletin Requests you need to open the promotion on the **Promotions/All Promotions** page.

Use the filters at the top of the page to display the desired items. The columns displayed on this page include Date, Area, Details, Approval Status, Priority and Published status.

You can click the ***Title*** link to open the entry.

Click the **Save Changes** button to save your changes to the Approved, Priority, and Published

columns.

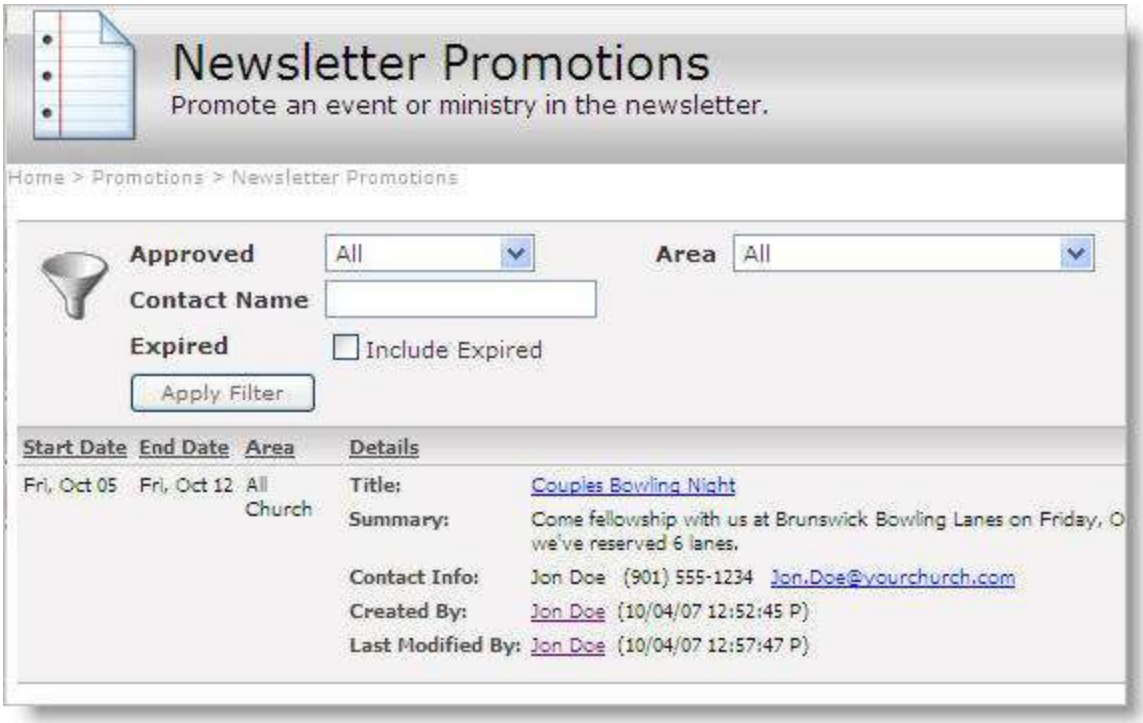


Newsletter Promotions

The **Newsletter Promotions** page is a central page where users manage newsletter requests for a printed newsletter. You can use this page as a quick reference for approval of all Newsletter Requests. Use this page to centralize printed and online newsletter requests. Arena does not publish a printed newsletter rather publishes an online e-newsletter. Use the filters at the top of the page to display the desired items. The columns displayed on this page include Starting and Ending Dates, Area, Details, Approval Status and Priority.

Click the ***Title*** link to open the entry.

Click the **Save Changes** button to save changes to the Approved or Priority columns.



All Promotion Requests

The **All Promotion Requests** page displays all Promotions. This is a reference point for all promotions and is where you can delete outdated promotions from the system.

Click the ***Title*** link for a promotion to open it for maintenance or approval.

You can add **Promotions** by clicking the **Add New Promotion** icon or clicking the ***Add*** link in the Filter area, or remove it by selecting the **Delete** icon in the appropriate row.

Promotion Approvals

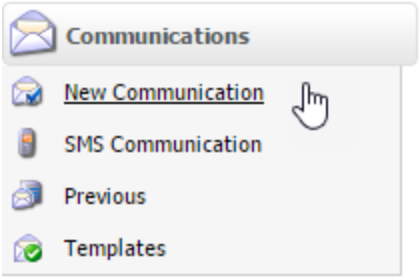
When you approve promotions, Arena stamps the promotion with the name of the current approver, the date and time of the approval.

Communications

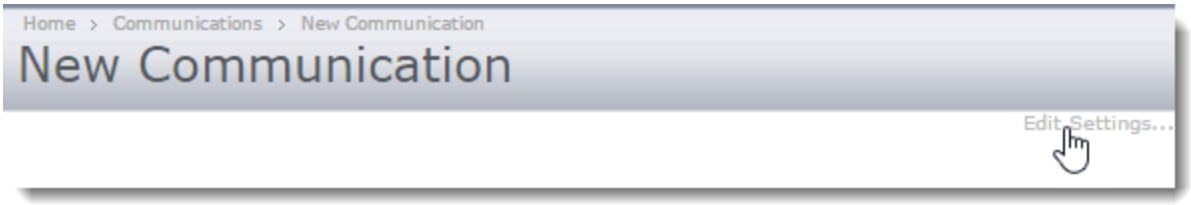
Use the pages in this section to send email communications, access previous emails, and create communication templates. Optionally, you can send SMS communications, manage thresholds, email subscriptions, and scheduling. Global Threshold is available to require approvals for email and SMS communications.

One important aspect of communications is the Module Settings. The steps below show how to set the **HTML Editor New Line Break** module setting. Other settings can be modified in a similar manner.

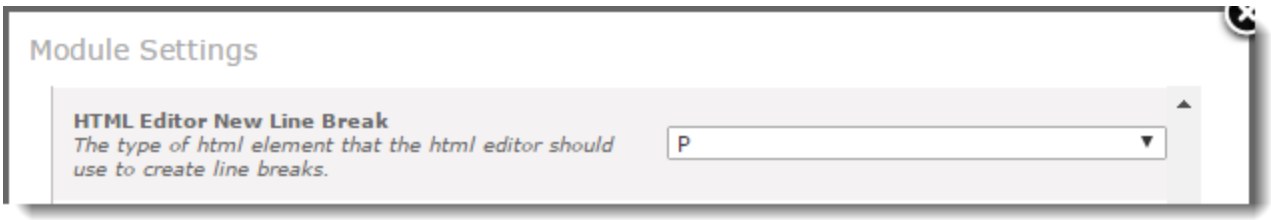
1. From the Communications menu, select the **New Communication** option.



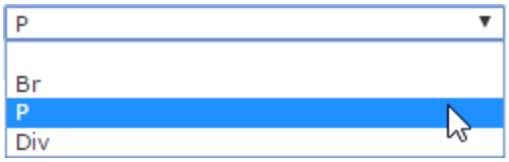
2. Click the ***Edit Settings...*** link in the upper right-hand corner.



3. Scroll down to the **HTML Editor New Line Break** option.

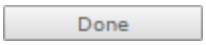


4. Select your setting. The default setting is "P" for paragraph. The other settings are "Br" for line break or "Div" for division.

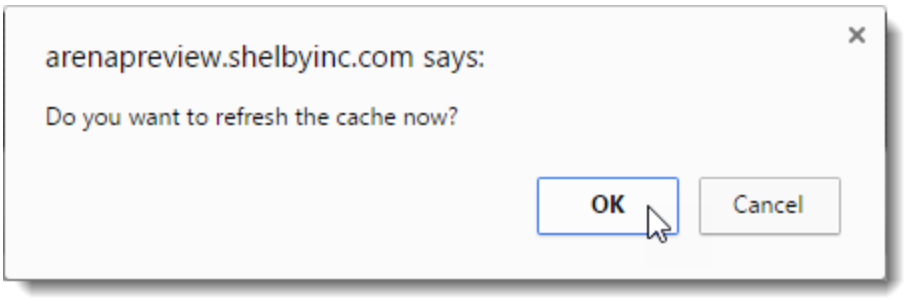


5. When you are finished making your selection, click the **Save** button at the bottom of the window.

6. Next, click the **Done** button.

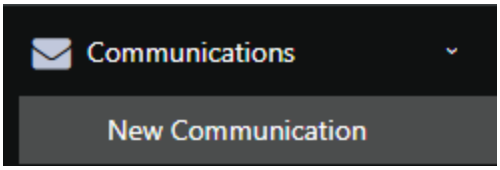


7. A pop-up message appears asking you to refresh cache. Click the **OK** button. The Module Settings for your communications are now updated.



Create a New Communication

1. From the **Communications** menu, click the **New Communication** option.



2. Click the **Add** button to add recipients. This opens the Person Search window to search and select current records. When you send emails to addresses that are no longer valid, Arena sends a “bounce back” email message to the sender. If your Arena Email Cleanup agent is running then Arena can process this message by inactivating the person’s rejected address

and placing a note on the address that it is invalid.

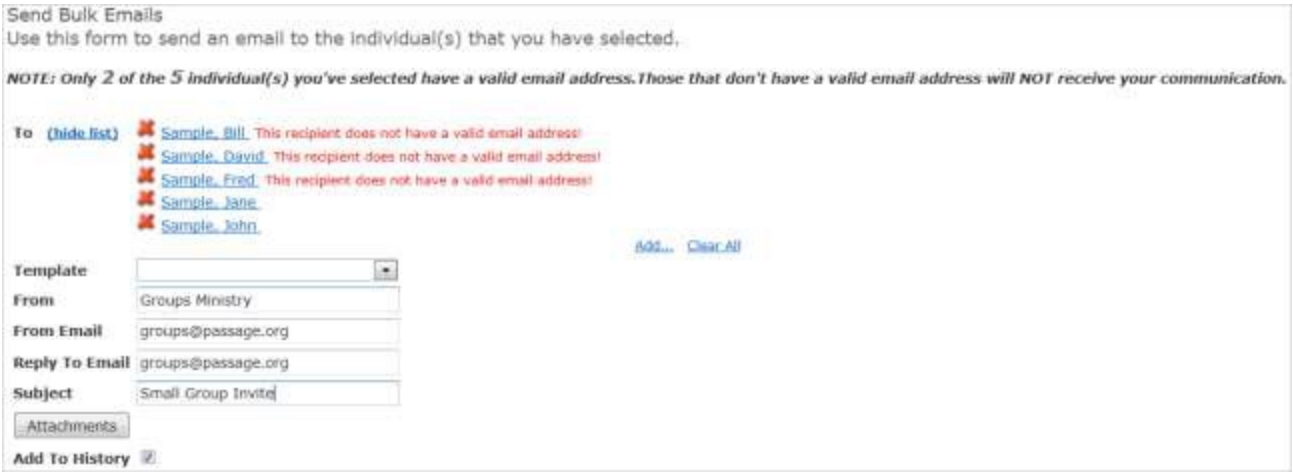
3. Select a **Template**, if available. (See Templates in this help file for more information.)

   The current user's name and email address populates the From and From Email fields. You can change either field to an alternate name and/or email address. If using Office 365, the email is be universally the same for all users.

4. Enter **Reply to Email** address, if different from the current user.

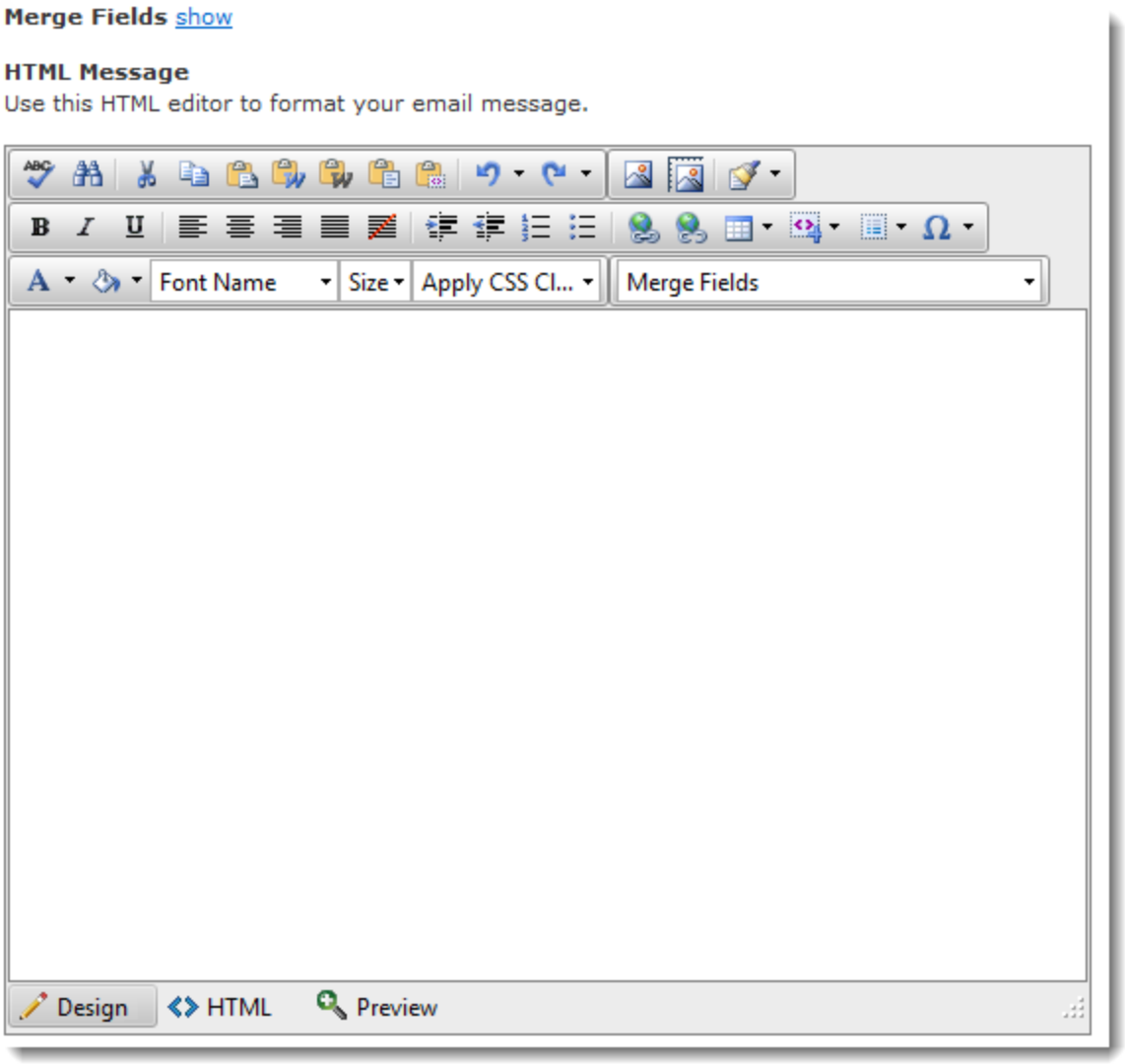
5. Click the **Attachments** button to add files to this communication. This brings up a pop-up window that allows you to browse and attach as many files as you choose. Click the **Close** button once you attach all the files. In respect to attachment, be aware of file size limits.

6. Select the **Add to History** check box to add this communication to the Person Detail history section of each recipient.



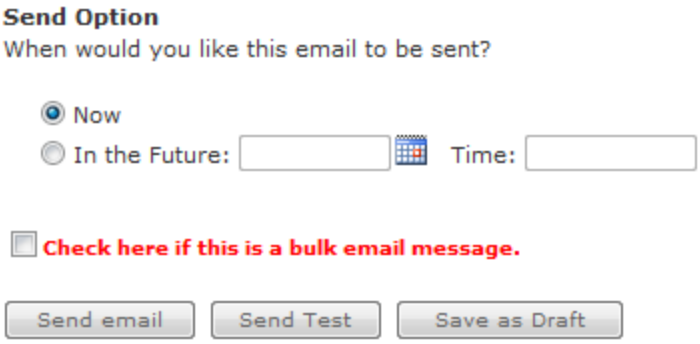
7. Type your email message in this window. Your email displays to the recipient in the same format that you enter it here. To use the available **Merge Fields** you can either copy/paste the fields from the Merge Fields section above the HTML window or use the Merge Fields drop-down in the HTML window. Using the##NickName## merge field code uses the Nick Name, if available, or First Name if no Nick Name is available.

NOTE: To enable email tracking on a message, include the ##EmailTracking## merge field in the message.



8. Beneath the HTML Message window, a Text Message box is where you can enter the same message in Plain Text format for those receipts who receive plain text emails.

9. Once you are ready to send, select the appropriate option.



- **Now**: Select the **Now** radio button to send the email to all recipients for whom you have email addresses.
- **In the future**: Select the **In the Future** radio button to schedule delivery of this email for a future date and time. Communications set to send at a future date and time are sent at this time and date and on the Mail Queue agent schedule.
- **Check here if this is a bulk email message**: Select this check box to provide recipient the option to unsubscribe to emails. When a recipient opts out the **Allow Bulk Emails** check box on their record is unchecked.
- **Send Test**: Click this button to send the email to the email address in the "From Email" field.
- **Save as Draft**: Click this button save the email for later access on the previous page.

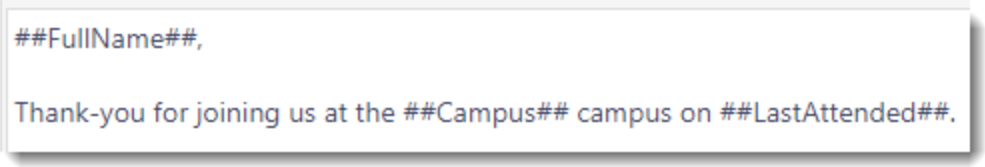
NOTE: If you are using SendGrid, a message header category is automatically saved when emails are sent.

When sending an email communication, if recipients do not have an active email address or SMS enabled number Arena displays the below window. This window also displays if your organization uses thresholds. From this window, you can merge those names with an available Word document, such as labels.

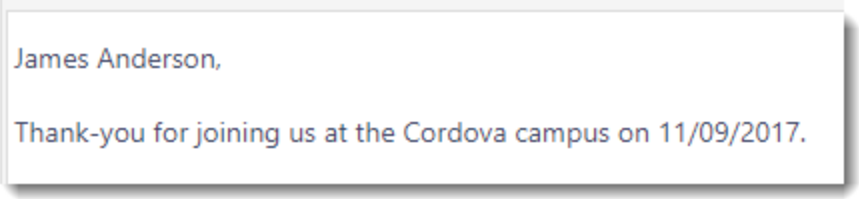
Merge Fields

Merge fields are used to insert specific data about an individual into an email message. This is done by entering two hash tags symbols (##) before and after the Merge Field. For example, if you enter merge fields (##FullName##, ##Campus##, and ##LastAttended##) in the **HTML Message** box for an email, then the **Email Message** is generated with the individual specific data in place of the merge fields. See the samples below.

HTML Message

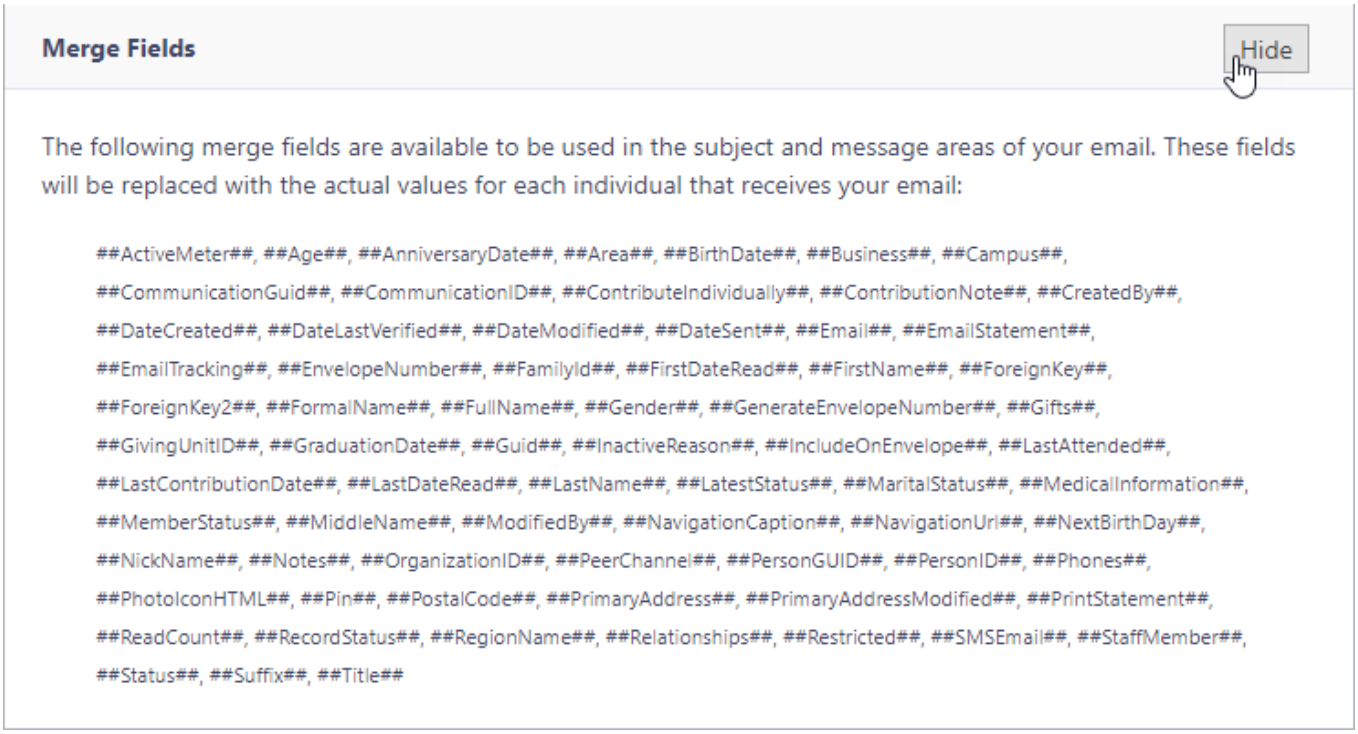


Email Message



The Merge Fields can be used in both the **Subject** and **Message** areas of an email.

There is an option to **Show** or **Hide** the Merge Fields when drafting an email. If you select to show the Merge Fields, they are displayed with the hash tag symbols included.



The Merge Fields are also listed here in a more readable format (without the hash tag symbols

included):

- ActiveMeter
- Age
- AnniversaryDate
- Area
- BirthDate
- Business
- Campus
- CommunicationGuid
- CommunicationID
- ContributeIndividually
- ContributionNote
- CreatedBy
- DateCreated
- DateLastVerified
- DateModified
- DateSent
- Email
- EmailStatement
- EmailTracking
- EnvelopeNumber
- FamilyId
- FirstDateRead
- FirstName
- ForeignKey
- ForeignKey2
- FormalName
- FullName

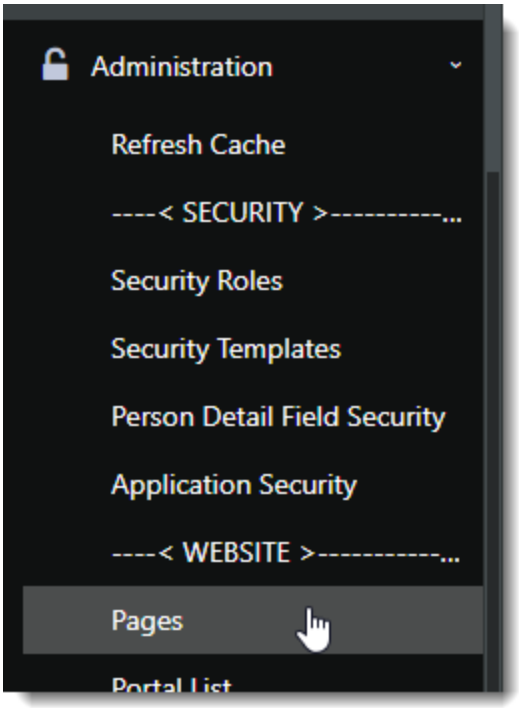
- Gender
- GenerateEnvelopeNumber
- Gifts
- GivingUnitID
- GraduationDate
- Guid
- InactiveReason
- IncludeOnEnvelope
- LastAttended
- LastContributionDate
- LastDateRead
- LastName
- LatestStatus
- MaritalStatus
- MedicalInformation
- MemberStatus
- MiddleName
- ModifiedBy
- NavigationCaption
- NavigationUrl
- NextBirthDay
- NickName
- Notes
- OrganizationID
- PeerChannel
- PersonGUID
- PersonID
- Phones

- PhotoIconHTML
- Pin
- PostalCode
- PrimaryAddress
- PrimaryAddressModified
- PrintStatement
- ReadCount
- RecordStatus
- RegionName
- Relationships
- Restricted
- SMSEmail
- StaffMember
- Status
- Suffix
- Title

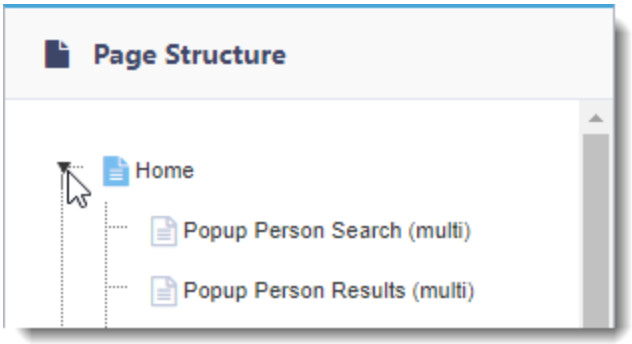
Change the menu name for New Communication

The following instructions guide you through changing the "New Communication" menu option to display "Send Email or Text".

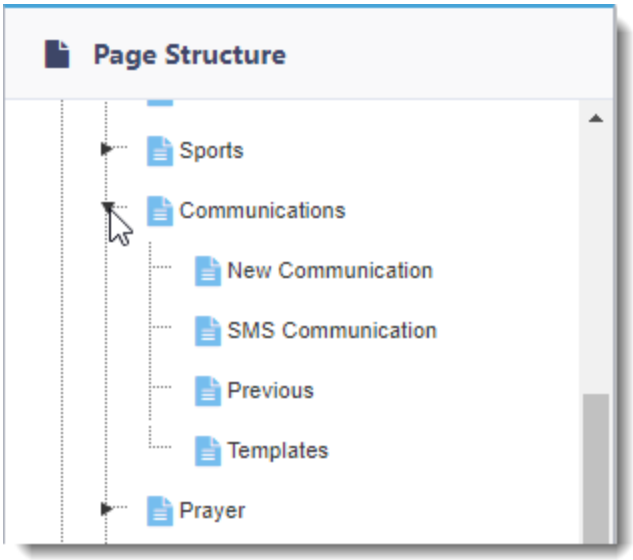
1. From the **Administration** menu, select the **Pages** option.



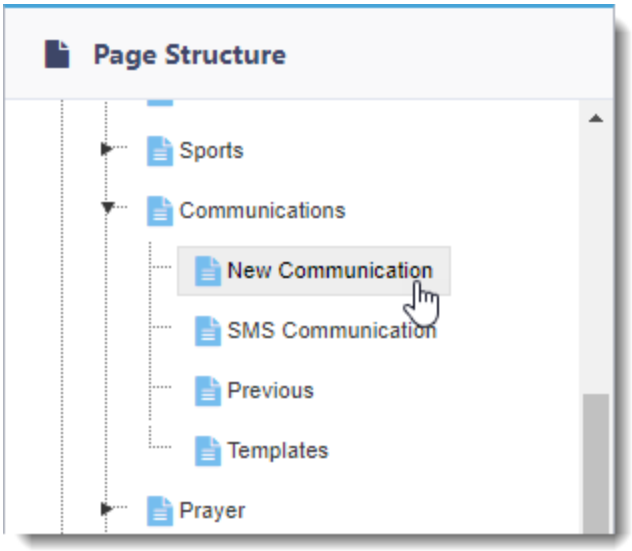
2. Within the **Page Structure** treeview box, click the **Expand** ▾ icon next to the **Home** folder.



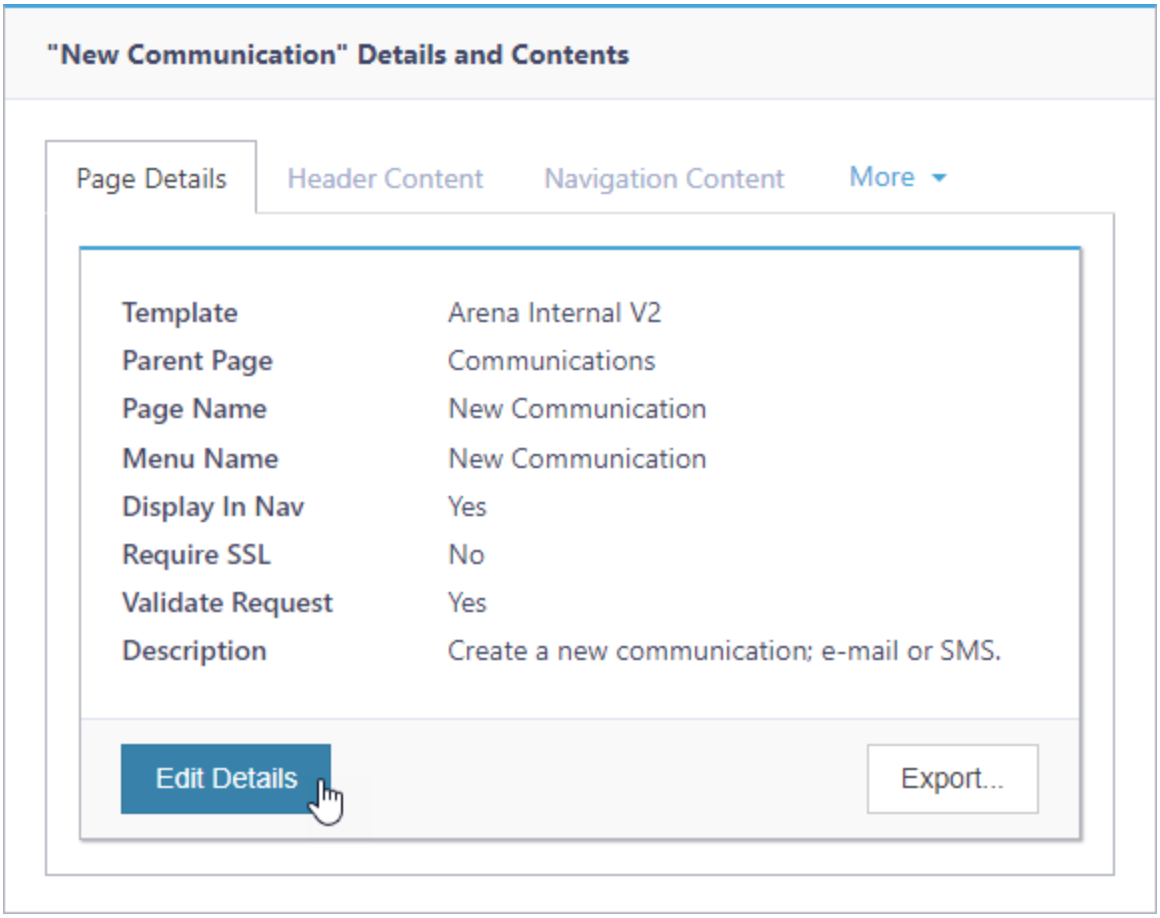
3. Scroll down and click the **Expand** ▾ icon next to the **Communications** folder.



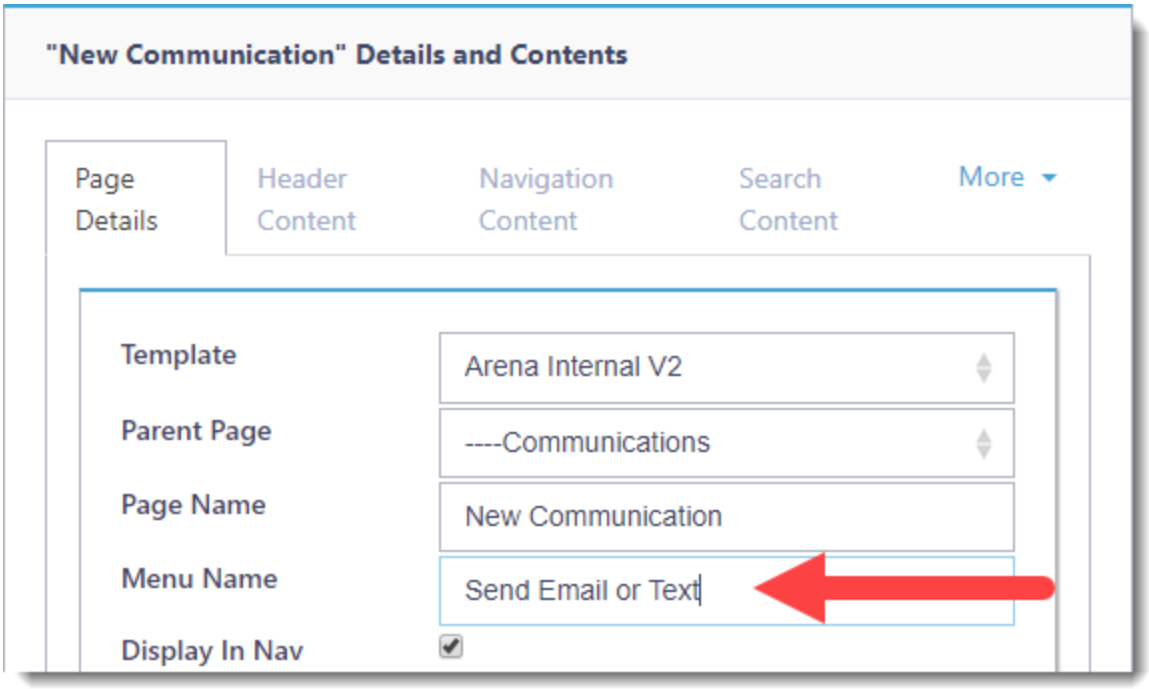
4. Next, click on the **New Communication** folder.



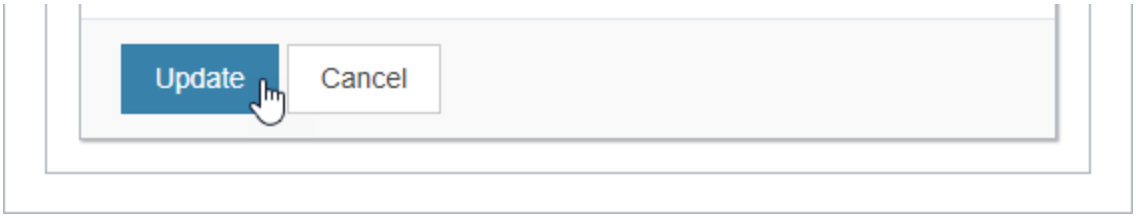
5. Click the **Edit Details** button under the **"New Communication" Details and Contents** section.



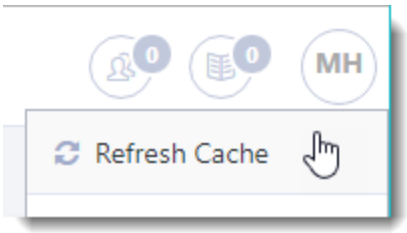
6. Change the **Menu Name** field from "New Communication" to "Send Email or Text".



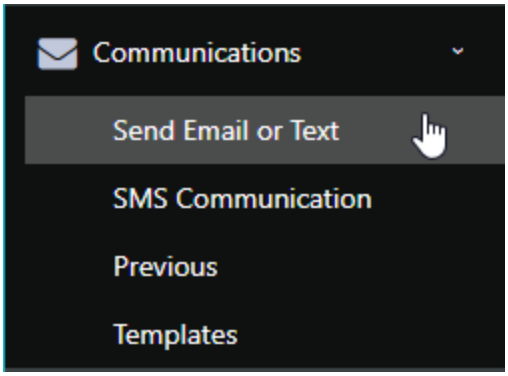
7. Scroll to the bottom of the **"New Communication" Details and Contents** section and then click the **Update** button.



8. Next, select the **Refresh Cache** option from the **Login menu** icon in the upper right-hand corner.



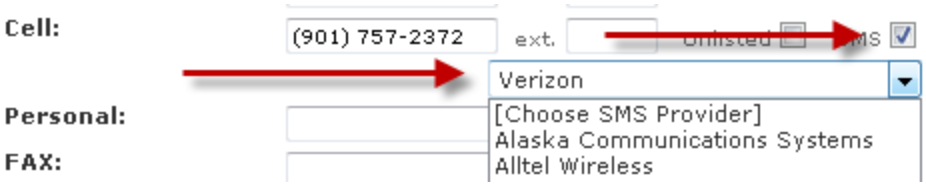
9. Notice that under the **Communications** menu, the "New Communication" option now displays as **Send Email or Text**.



SMS Communication

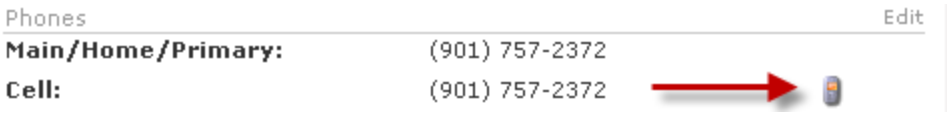
When using this option to text via email, replies are sent to the email address From Email field.

Enter the 10-digit phone number (found on the **Individual Information** tab of **Person's Detail** page) and select the provider from the **Person Detail** page.



You can now select the **Send Text Message** (SMS) icon from the **Person Detail** page of the grid results in a List, Group, Tag or Mission Trip.

Person Detail SMS



Grid Results

Now you are ready to enter your **message** in the SMS Message box. The counter shows how many characters have been entered. The number of characters are not limited due to some cell providers sending multiple texts if 160 characters are exceeded.

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

To (show list) Add... Clear All

Template

From George Sample

From Email george@pcc.org

Add To History ☑

Merge Fields hide

The following merge fields are available to be used in the subject and message areas of your SMS. These fields will be replaced with the actual values for each individual that receives your SMS:

##ActiveMeter##, ##Age##, ##AnniversaryDate##, ##Area##, ##BirthDate##, ##Business##, ##Campus##, ##CommunicationID##, ##ContributeIndividually##, ##ContributionNote##, ##CreatedBy##, ##DateCreated##, ##DateLastVerified##, ##DateModified##, ##DateSent##, ##Email##, ##EmailStatement##, ##EnvelopeNumber##, ##FamilyId##, ##FirstName##, ##ForeignKey##, ##ForeignKey2##, ##FormalName##, ##FullName##, ##Gender##, ##GenerateEnvelopeNumber##, ##Gifts##, ##GivingUnitID##, ##GraduationDate##, ##Guid##, ##InactiveReason##, ##IncludeOnEnvelope##, ##LastAttended##, ##LastContributionDate##, ##LastName##, ##LatestStatus##, ##MaritalStatus##, ##MedicalInformation##, ##MemberStatus##, ##MiddleName##, ##ModifiedBy##, ##NavigationCaption##, ##NavigationUrl##, ##NextBirthDay##, ##NickName##, ##Notes##, ##OrganizationID##, ##PeerChannel##, ##Peers##, ##PersonGUID##, ##PersonID##, ##Phones##, ##PhotoIconHTML##, ##Pin##, ##PostalCode##, ##PrimaryAddress##, ##PrimaryAddressModified##, ##PrintStatement##, ##RecordStatus##, ##RegionName##, ##Relationships##, ##Restricted##, ##SMSEmail##, ##StaffMember##, ##Status##, ##SubDonorId##, ##Suffix##, ##Title##

Text Message

SMS text delivered via email might be split into multiple messages if the contents exceed 160 characters (varies per cellular carrier). Some carriers might include more text to include the sender. E.g., "From: John Doe".

0

From: Arena auto-populates the current user's name. You can change this to any other person or department name. This field allows one entry.

From Email: Arena auto-populates the current user's email address. You can change this to any other email address. This field allows one email address. This email address displays as the sender for the recipient.

NOTE: Users can reply with a "STOP" message to disable SMS from a phone number.

Previous

This page displays all sent, scheduled and drafted email and SMS communications for the current user. Click the ***Date*** link to display the communication. If you edit and send a previously sent communication, Arena sends a new email.

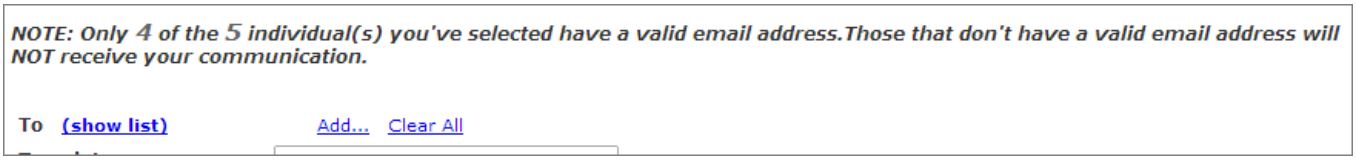
Previous Communications: Show Everybody's Communications

Date	Created By	Sender's Name	Sender's Email	Subject	Medium	Recipients	Successful	
4/30/2014 12:59:01 PM	lindaj	The Wife Johnson	linda.johnson@arenachms.com	final email test for today	Mail	1		
4/30/2014 12:58:59 PM	lindaj	The Wife Johnson	linda.johnson@arenachms.com	final email test for today	Email	5	4	
4/30/2014 12:57:58 PM	lindaj	The Wife Johnson	linda.johnson@arenachms.com	test	Email	1	1	
4/30/2014 12:48:41 PM	lindaj	The Wife Johnson	linda.johnson@arenachms.com	draft sample	Email	10		

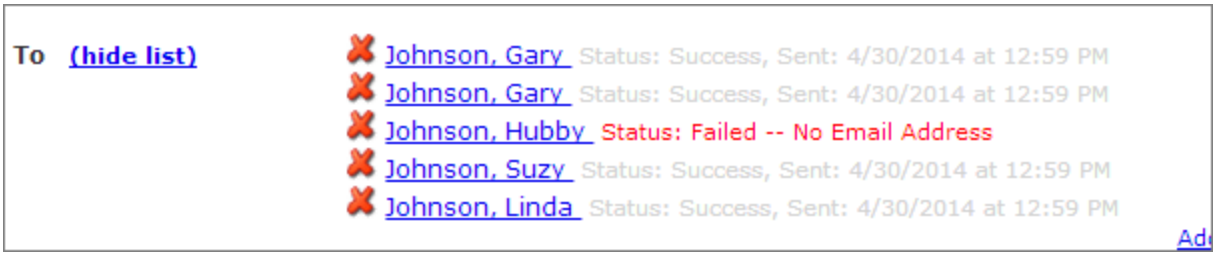
- **Show Everybody's Communications**: Check this box to display sent emails from all users. The default option is per user.
- **Draft**: The **Saved Draft** icon displays to indicate the communication is saved as a draft.
- **Date**: This column displays date and time when the email or SMS was sent or drafted. Click this link to display the email.
- **Created By**: This column displays the user name whom created the email.
- **Sender's Name**: This column displays the name of the sender.
- **Sender's Email**: This column displays the email address of the sender.
- **Subject**: This column displays the email subject.
- **Medium**: This column displays the communication medium used. Options are email, SMS and mail.
- **Recipients**: This column displays the number of original recipients per communication medium.
- **Successful**: This column displays the number of successful communications sent.
- **Delete**: Click the **Delete** icon to delete a communication.

To view list of recipients in previously sent communications:

- Click the ***Date Time*** link to display the email.
- Click ***Show List*** link to display the recipients.



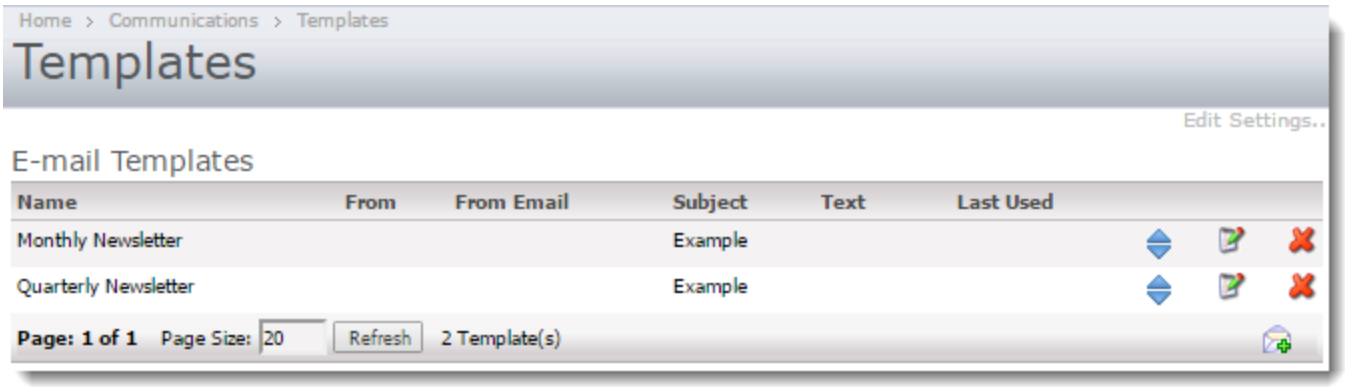
Arena displays all recipients, a day and time for those successfully sent, and a failed notification for those not sent.



Templates

Email Templates are for use in the Communications area of the internal application. Create email templates for bulk emails you send on a regular basis and need quick access. Consider creating templates with a preset user name and email address that replaces the name and email of the current user.

You can see your existing templates listed on the grid. Click and drag the **Reorder** icon to change the order of the E-Mail Templates.

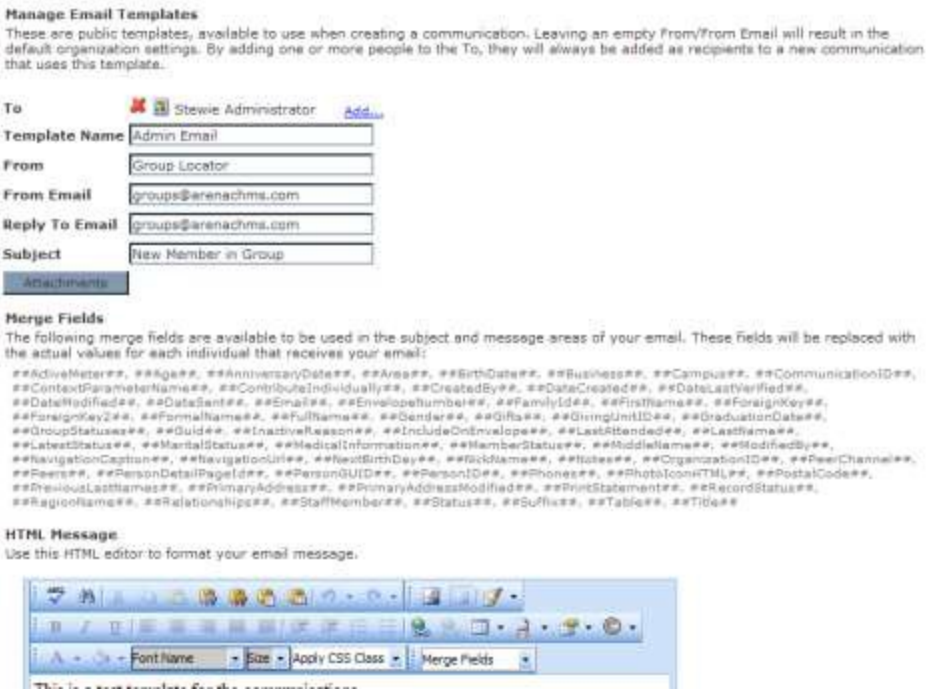


Create a New Email Template

You can create new email templates from within the Communications area of the navigation.

From the **Communications** menu, click the **Templates** option.

1. Click the **Add New (Template)** icon.
2. Complete all applicable fields.



- **To**: Click the ***Add*** link to add existing records. You can add multiple records. You can also use this as a cc field for email communications.
- **Template Name**: Enter a name for this template.
- **From**: Enter a name for the sender, if desired.
- **From Email**: Enter an email address for the send, if desired.
- **Reply to Email**: Enter the reply email address.
- **Subject**: Enter a subject for this template, if desired.
- **HTML Message**: Using the full HTML tools, format this template, as desired.
- **Text Message**: (not shown) Use this text area to enter the message that you would like people to receive when they cannot view your HTML message above. If you leave this area blank, the system attempts to strip the HTML code from your message above when sending to text-only email clients.

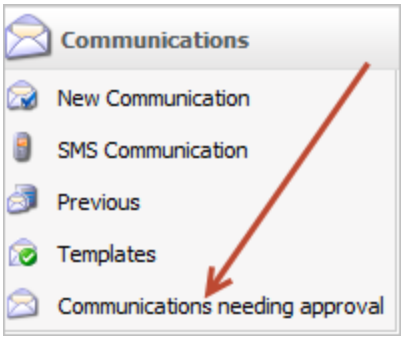
3. Click the **Save** button to save the template for use in future communications.

4. From the **Communications** menu, click the **Templates** option and your template displays as an available template option.

Approve Emails

If applicable, your Arena Administrator can add a page to allow designated users to approve Communications that exceed the threshold. Users with approval permissions can view, approve, and reject the emails that exceed the threshold.

1. From the **Communications** menu, click the **Communications Needing Approval** option.

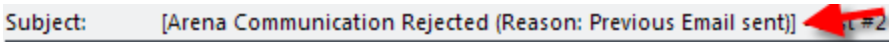


2. Click the ***Email*** link to review.

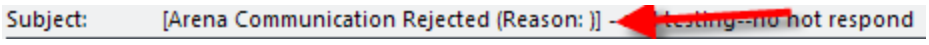
3. After reviewing the email, you can either approve or reject the email. Arena sends an email notification to the requestor. If rejected, the reason is included in the email.

Process Email

Rejected with a reason



Rejected without a reason



If an email Communication includes members with no email address, you have the option to create labels for these members.

Your communication has been queued on the email server.

Note: The following people do not have a valid email address, but do have a street address on file. Would you like to print mailing labels for them?

Arnault, Lee

Export To Word

Arena tracks Email, SMS and Mail Communications on the **Previous Communications** page.

Previous Communications:

☐ Show Everybody's Communications

Date	Created By	Sender's Name	Sender's Email	Subject	Medium	Recipients	Successful
12/28/2009 11:16:00 AM	lindaj	Linda Johnson	linda.johnson@arenachms.com	Word label test	Mail	59	✘
12/28/2009 11:15:59 AM	lindaj	Linda Johnson	linda.johnson@arenachms.com	Word label test	Email	62	✘
12/1/2009 3:50:52 PM	lindaj	Linda Johnson	[illegible]	Text Message	SMS	1	✘

Prayer

Arena tracks all aspects of Prayer Requests with an approval process for each step, including prayer requests entered from your website, responses to the original requestor, and a record of answers and comments. Due to the sensitive nature of a prayer request, and the nature of the communication between the organization, family and requestor, we have integrated an approval process for any information associated with the request. We understand each organization has its own process for handling prayer requests, including assigning specific personnel to handle certain tasks. In the following example, we assume different people are involved at each step.

Customization Options

- Customize the Prayer Category and Prayer Source Lookups.
- Set security for users who can approve prayers requests, approve answers, approve comments and view private prayer requests.
- Customize the Prayer Request Days Active and Prayer Request Renewals Organization Settings.
- Start the Process Prayer Requests agent and be sure to add the Prayer Page URL to this agent.
- Start the **Process Prayer Requests** agent.
- Customize the **Prayer Request Comments**, **Prayer Request Expire No Renewal**, **Prayer Request Expire** and **Renewal System Emails**.
- Customize the **Prayer Request Days Active** and **Prayer Request Renewals Organization Settings**.
- Customize the **Prayer Category Lookup**.

Using all the available options for Arena Prayer Request feature might follow the process below:

Person submits prayer request on the Arena-managed website or a staff member enters the prayer request on the **Add Prayer** page. Using the Arena-managed website option, Arena can send an email to the specified email address when new entries are made.

Prayer request is reviewed and approved on the **Approve Requests** page.

Approved prayer requests would be available on the **Prayer Ministry Toolbox** on your Arena-managed website. Your Arena Administrator can limit prayer categories to display, including those marked as private.

The prayer team and/or staff can view and pray over the approved prayer requests on the **Prayer Ministry Toolbox** page on the Arena-managed website or the **All Prayer Requests** page. If permissions allow, the prayer team members can also enter comments as they pray. Arena tracks

the viewing of prayers as well as entered comments.

Staff with applicable permissions can view and approve comments on the **Approve Comments** page. Arena sends the approved comments, via email, to the requestor.

If renewing is permitted, after X days the prayer requestor can receive an email notification to renew the prayer request. If renewing is allowed, the prayer requestor receives an email notification prior to expiration. The prayer requestor can renew the prayer request. If renewing is not permitted, the prayer requestor receives email notification of the expired prayer and be able to enter a prayer answer.

Answers can be reviewed and approved on the **Approve Responses** page. If prayer request still active, answer shows online in Prayer Toolbox.

This Section Includes:

Add Prayer Request

Approve Requests

Approve Answers

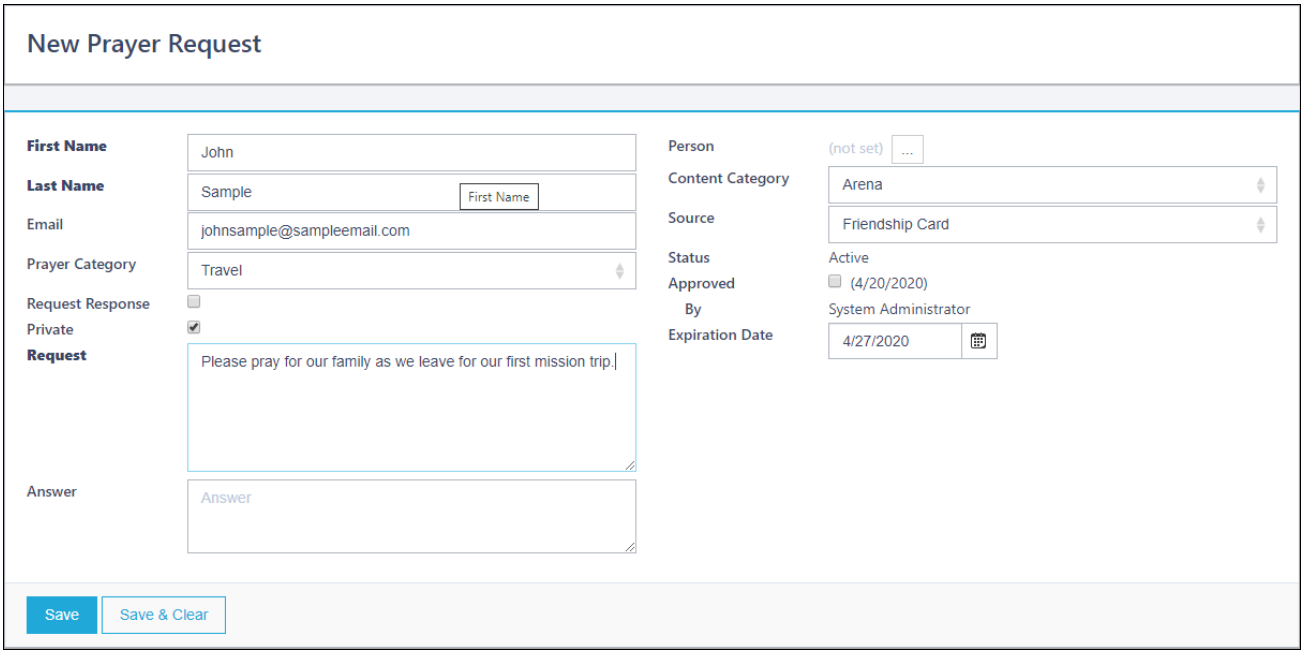
Approve Comments

All Prayer Requests

Reports

Add a Prayer Request

1. From the **Prayer** menu, click the **Add Prayer Request** option.
2. Complete the information on this page.



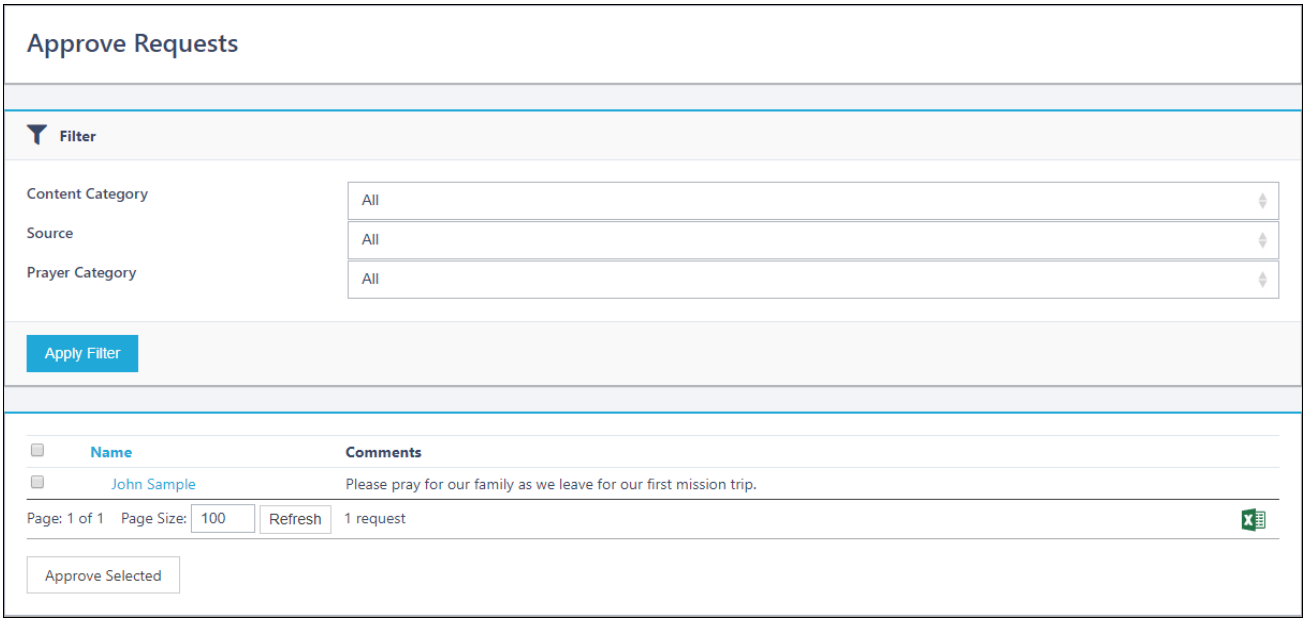
- **First and Last Name** – If a record does not exist enter the first and last names for the person to whom the prayer request applies.
- **Person** – If a record does exist, click the ***Change*** link to select the person's record.
- **Email** – Enter the person's email address.
- **Prayer Category** – Click the drop-down list to select the category for this request.
- **Request Response** – Select this check box to send an email response to the person's prayer request.
- **Private** – Select this check box if this prayer request is to be available to only those whom have access to private prayer requests.
- **Content Category** - Click the drop-down list to select a category for the content. When a member enters a prayer request from the Arena-managed website, the Content Category identifies the location on the Arena-managed website.
- **Source** - Click the drop-down list to select a source for the request.
- **Status** – You can select Expired when a prayer is no longer active.
- **Approved** – If you have permission, you can approve the request. Otherwise, the prayer requests can be approved on the **Approve Requests** page.
- **Expiration Date** – Enter the date the prayer request should expire.
- **Request** – Enter the prayer in this field.
- **Answer** – Enter the prayer answer in this field. Arena sends a system email to the prayer requestor, when Request Response is checked, containing the answer.

3. Click the **Save** button, or the **Save & Clear** button to save this request and enter another. Once a request is entered into Arena, it is always accessible (with the appropriate security role) from the **All Prayer Requests** page regardless of the status.

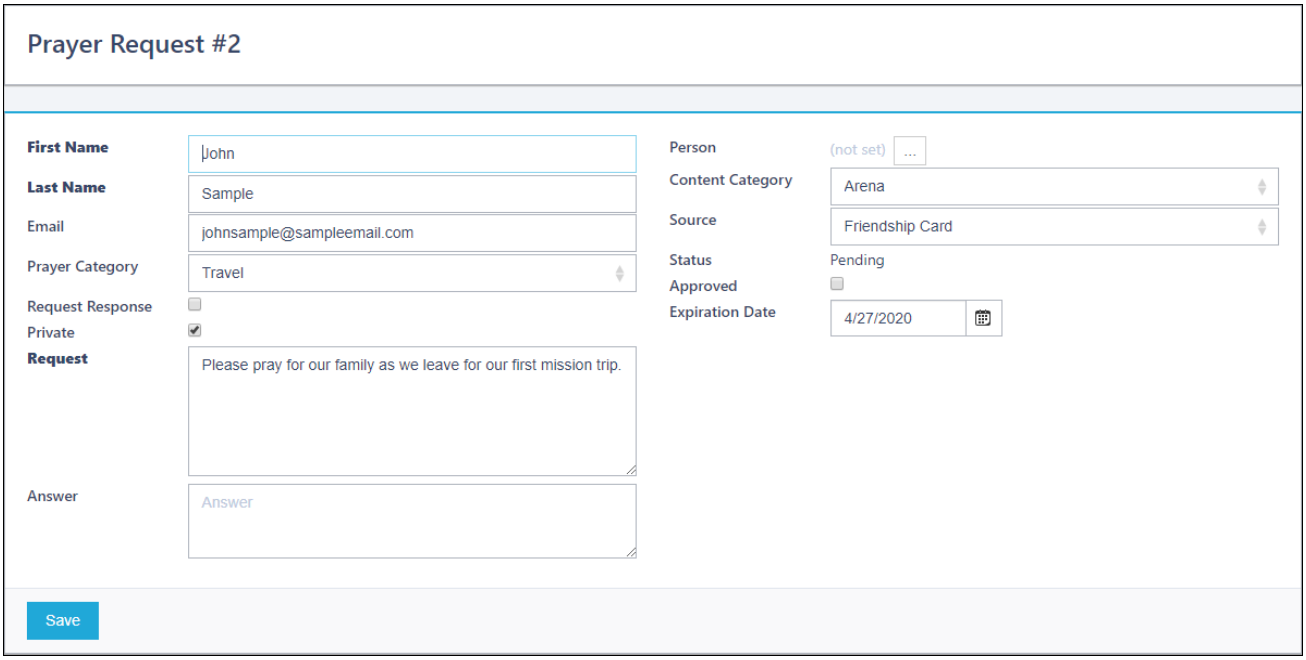
Approve Requests

Prayer Requests that need approval display on the **Approve Prayer Requests** page after entry. Use the filters to display specific prayers. You can view and approve a specific prayer or approve several prayers.

1. From the **Approve Requests** page, click the ***Name*** link to view the prayer request. You can optionally check the check box in the far left column for each prayer to approve.



2. Review the prayer request.



3. Check the **Approved** check box.

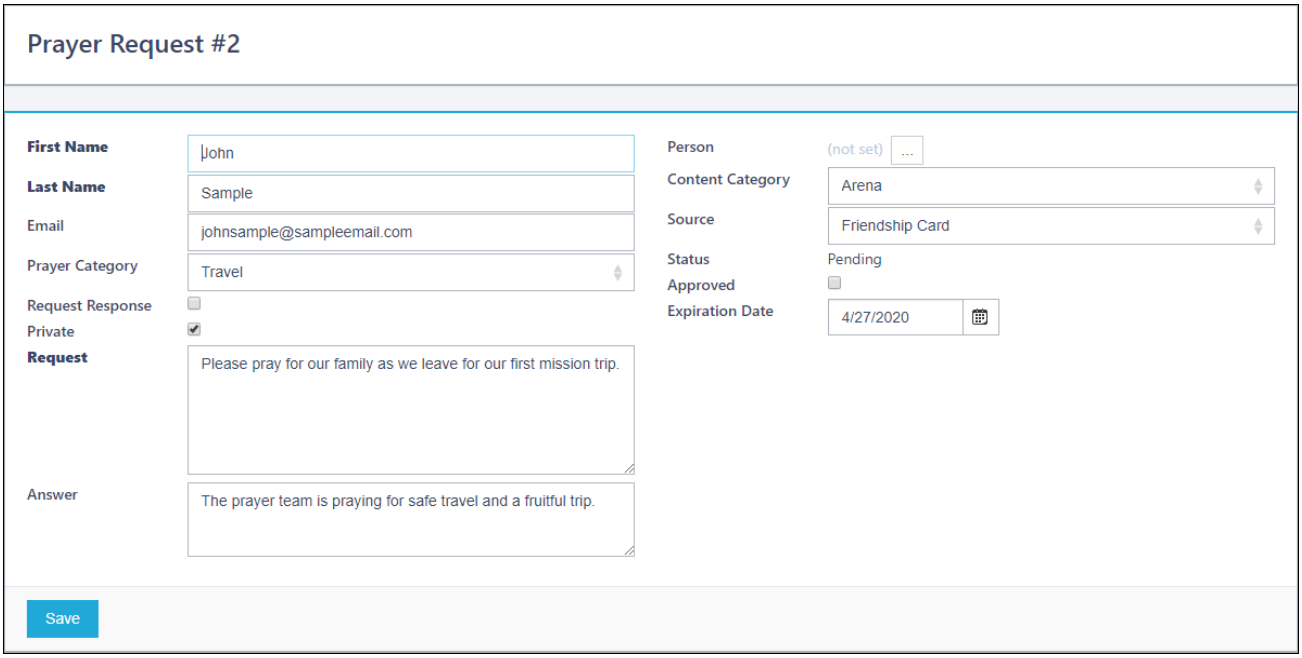
4. Click the **Save** button.

Prayer Answers

Arena has the option for users with permissions to enter answers and for specific users to approve answers.

1. From the **Approve Answers** page, use the filters.

2. Enter the **Answer**.



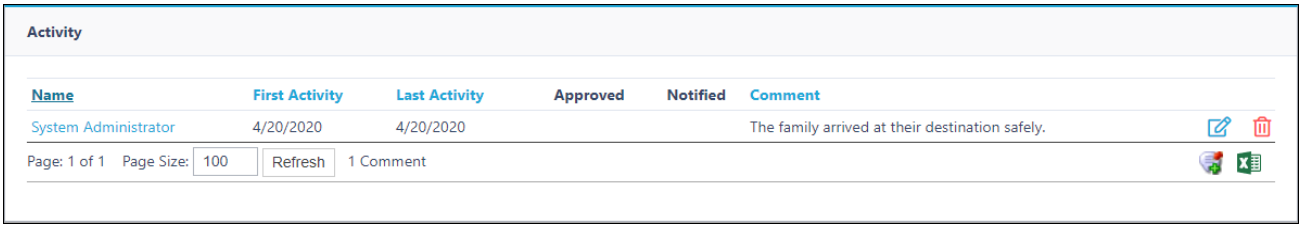
3. Click the **Save** button.

Approve Comments

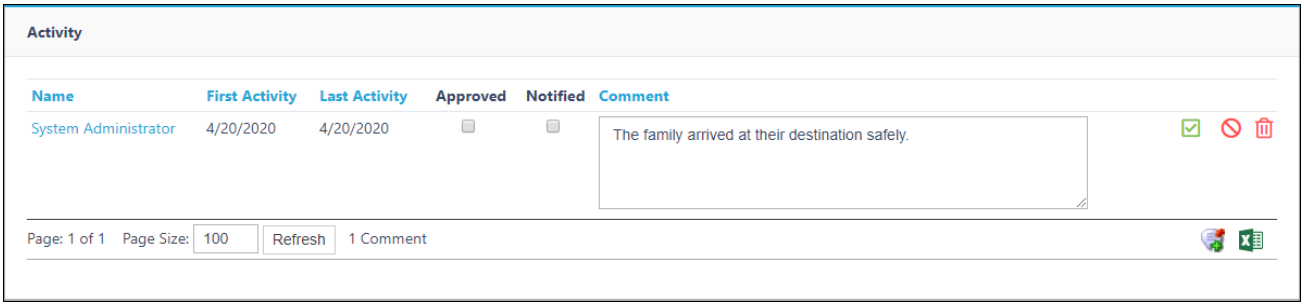
From the **Prayer Details** page, users with permissions can add comments. All comments added to a prayer request require approval. Comments with no approval do not display. Comments display on the **Approve Comments** page. Click the ***Approve Comments*** link to display the page below, which lists all requests with new comments needing approval. Use the drop-down list filters to limit the requests displayed.

Add Comments

1. From the **Prayer Details** page, click the ***Add*** link.



2. Enter comments.

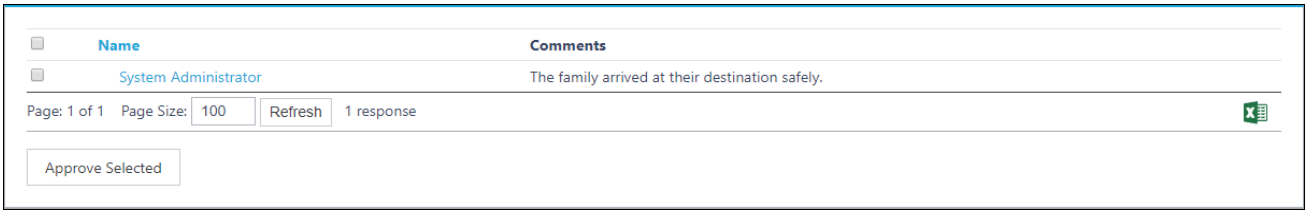


3. Click the **Update** icon.

Approve Comments

1. From the **Approve Comments** page, review the comments.

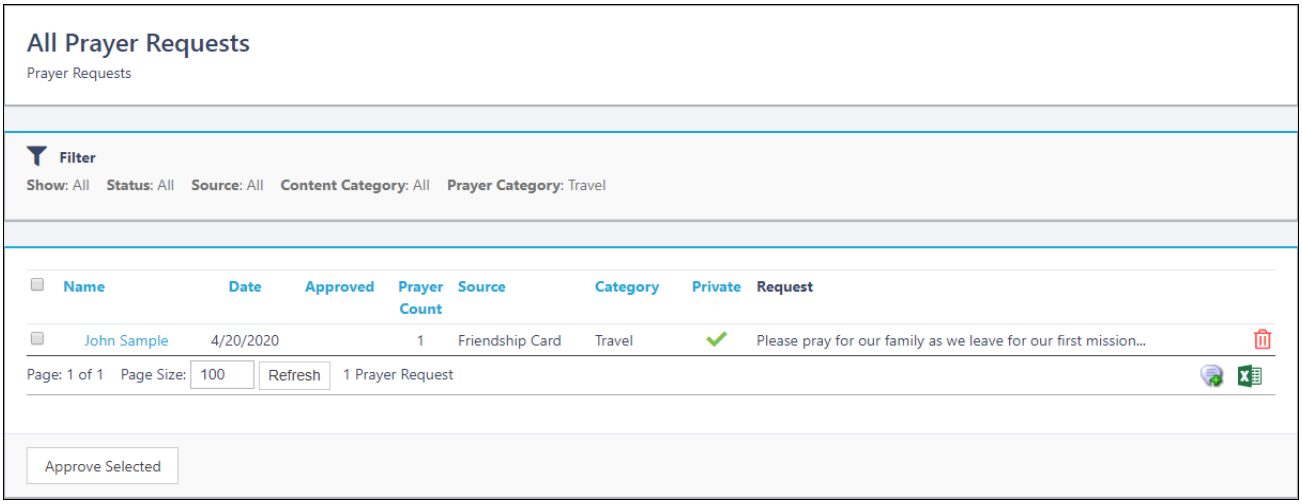
2. Select the check box in the far left column.



3. Click the ***Approve Selected*** link.

All Prayer Requests

This page displays all prayer requests regardless of the person's status. You can approve requests or delete requests from this page. Use the drop-down list filters to limit the requests to display.



From the **All Prayer Requests** page, you can:

- Filter by name, status, sources, content category, prayer category, dates, public and private prayers.
- Approve selected prayers.
- Add a new prayer request.
- Delete a prayer.

Reports

The Reports area has identical functionality to the Reports section in Membership. See your Arena Administrator regarding adding Prayer Reports.

Web Content

You can create and maintain Polls, classified ads, newsletters, photo albums, e-cards, and e-invitations in the Web Content section. Some features members can generate on your Arena-managed website but you can approve what is available.

Web Content then becomes a useful set of tools to not only communicate with your Membership base more effectively, but also get the Organization more involved with the local community, help the Membership base get involved with the Organization, with each other, and the community.

This section of the Arena End User help file only covers the internal functionality of each feature. For help implementing website driven features, refer to the Arena Administrator Help.

Polls

Polls, when placed on the Arena-managed website pages, create a feature that enables members to answer survey style questions, allowing the Organization to learn the opinions of the Membership base. You can also place Polls on internal Arena pages so that staff users are included.

From the **Web Content** menu, click the **Polls** option to bring up the list of currently created Polls. This list shows the Active Status, Poll Question, Category, the ***Modify Answers*** link, the number of responses, and the number of answers.

Create a New Poll

1. Click the **Add New Poll** icon. Arena adds a New Poll Question.
2. Click the **Edit** icon to modify this poll. This opens the options within the list.

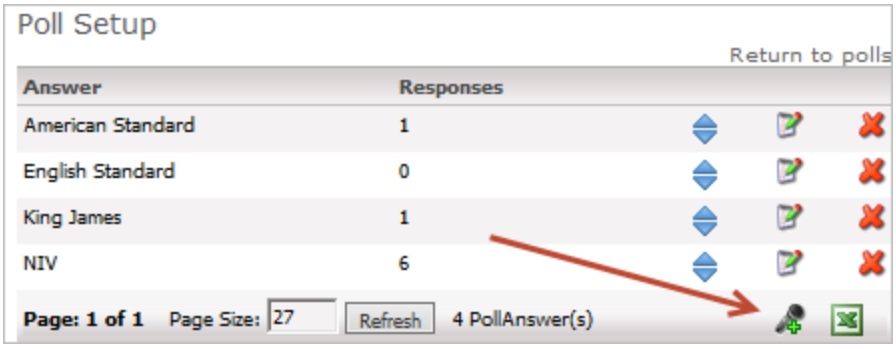
3. Select the **Active** check box if this Poll is Active.
4. Enter the desired question.
5. Choose the **Category** in which this poll displays.

6. Click the **Delete** icon to remove this Poll.

7. Click the ***Modify Answers*** link to add new Poll Answers or modify existing Answers. This opens the Answer List, showing the Poll Answer, the number of Responses, and arrows for ordering the answers.

Add a Poll Answer

Click the **Add New Poll Answer** icon to enter a new answer. If you already know how many answers you want and what they will be, click the **Add New Poll Answer** icon until you have the desired number. This creates several answers entitled **New Answer**.



- Click the **Edit** icon to edit the answer. Click the **Edit** icon to enter the number of responses manually.
- Enter the **Answer** value.
- Click the **Update** icon to save.
- Repeat the last four steps for each choice you offer for an answer.
- Click the **Reorder** icon to drag and drop the field to the desired position. The poll lists the possible answers in the order listed here. Click the ***Return To Polls*** link when finished to return to the Poll list.

Classifieds

The Classifieds feature has two main types, Classified and Business Directory. Each type has a separate page on your Arena-managed website. Users can submit classified ads and business directory listings. Once approved, the classifieds ads and directory listings are available for other

users on your Arena-managed website.

Classifieds Customization Options

Verify the **ClassifiedApprovalPage Organization Setting** is set to the correct page. This page should be the **Classified Approve** page with only the security roles that are set to approve classifieds. These roles should have View, Edit and Approve permissions.

Start the **Classified Cleanup Agent**. Be sure to customize the agent settings.

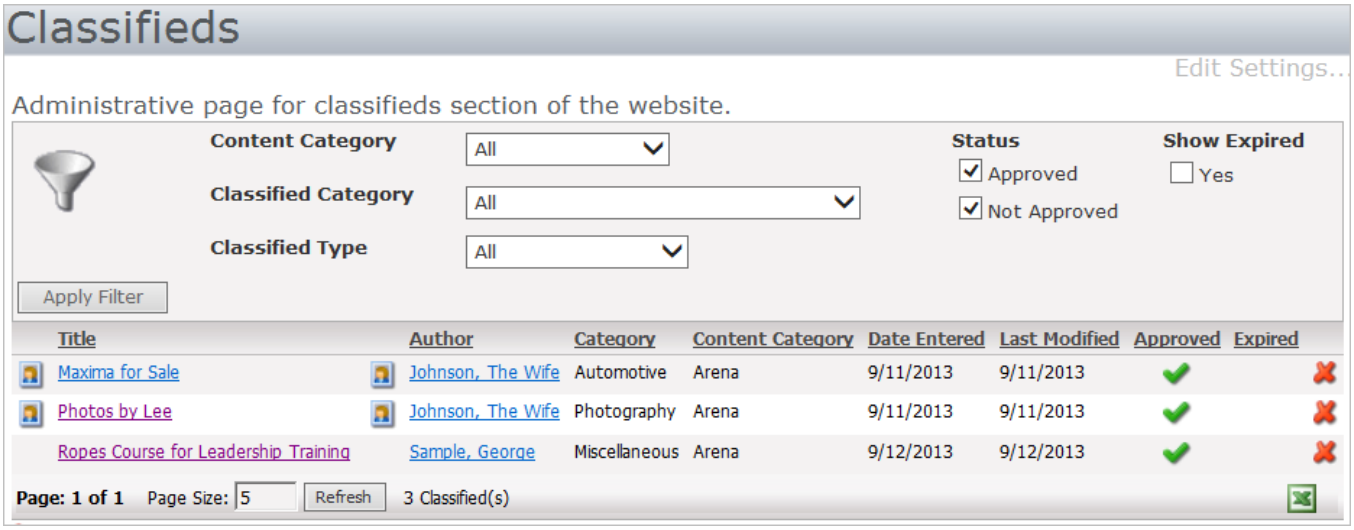
Verify **Classified Approval Page Organization Setting**.

Customize **Classified Expire Days Organization Setting**.

Customize **Classified Category and Classified Type**.

Set security for users who can view and approve.

From the **Web Content** menu, click the **Classifieds** option to display a list of all Classifieds. This list shows the Ad Title, the Author of the Ad, the Classified Category, the Content Category, the date Last Modified, the Approval status, and if the Ad has Expired. Use the filter options at the top to choose exactly what Classified Ads to show.



Process a Submitted Classified

1. Click the Title ***Name*** link to open the classified submission.

2. Review and edit, as desired.

- **Title** – This is the title of the ad; this displays as the Classified Ad entry.
- **Text** – Enter or review the description of the item.
- **Classified Category** - Click the drop-down list to choose the Category in which the item displays.
- **Content Category** - Click the drop-down list to choose in which content area the ad displays.
- **Phone** – Enter the person's phone number associated with the classified listing.
- **Email** – Enter the person's email address associated with the classified listing.
- **Expire Date** – This is the date on which the ad expires and no longer displays.
- **Approved** – Select this check box to approve the item.
- **Picture** - Click the **Browse** button to select a picture to upload so that it displays in the ad.

3. Select the **Approved** check box.
4. Click the **Save** button when finished.

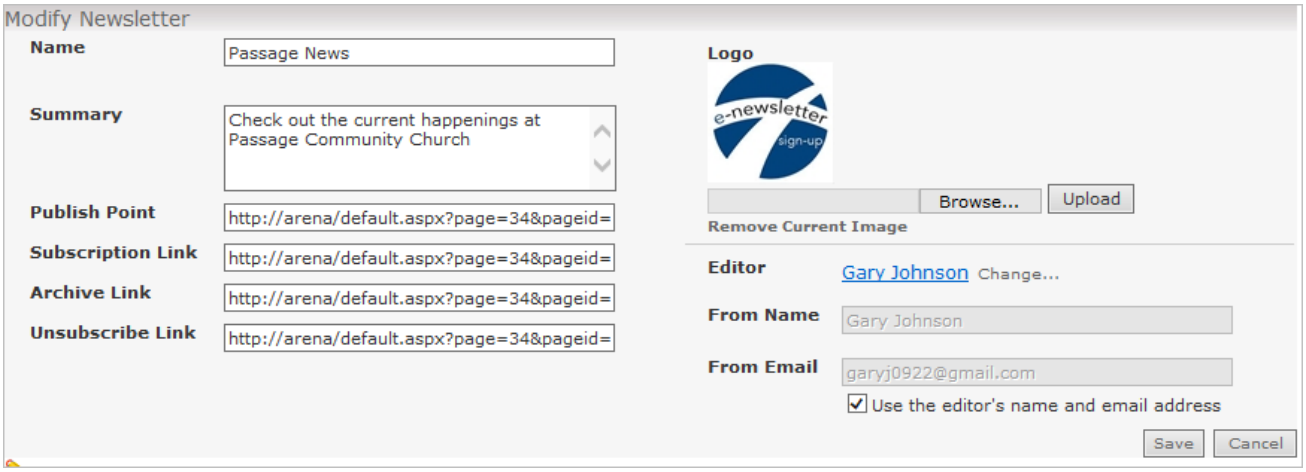
Newsletters

The Newsletters feature is designed to add e-newsletters to your Arena-managed website, enabling users the ability to subscribe. You can create multiple newsletters for different areas of your ministry. Each newsletter consists of volumes, which in turn contains articles written by authors. (See your Arena Administrator regarding additional setup.)

Create a Newsletter

Each Newsletter is comprised of a Volume number, Author and Articles. The first step is to create your Newsletter.

1. Click the **Add New Newsletter** icon to create a Newsletter.



2. Enter the appropriate information for this newsletter.

- **Name** – This is the name of the Newsletter.
- **Summary** – Enter a summary for the Newsletter.
- **Publish Point** – This is the URL of the website to publish the Newsletter.
- **Subscription Link** – If you wish to have a link within the Newsletter where a reader can subscribe, enter the URL for the page link.
- **Archive Link** - This optional link is to a website URL where past issues of the Newsletter are available.
- **Unsubscribe Link** – This URL leads to a website where current Newsletter subscribers can cancel their subscriptions. This is included in the Newsletter Email.
- **Logo** – Click the **Browse** button to choose a Logo Image and click the **Upload** button to

use it for this Newsletter.

- **Editor** – Click the ***Change*** link to assign or change an editor to this Newsletter. This opens the Person Pop-up Search, where you can choose a person. If there is no editor, the check box is disabled.
- **From Name** – Enter the name of the sender of the newsletter.
- **From Email** – Enter the email address of the sender of the newsletter.

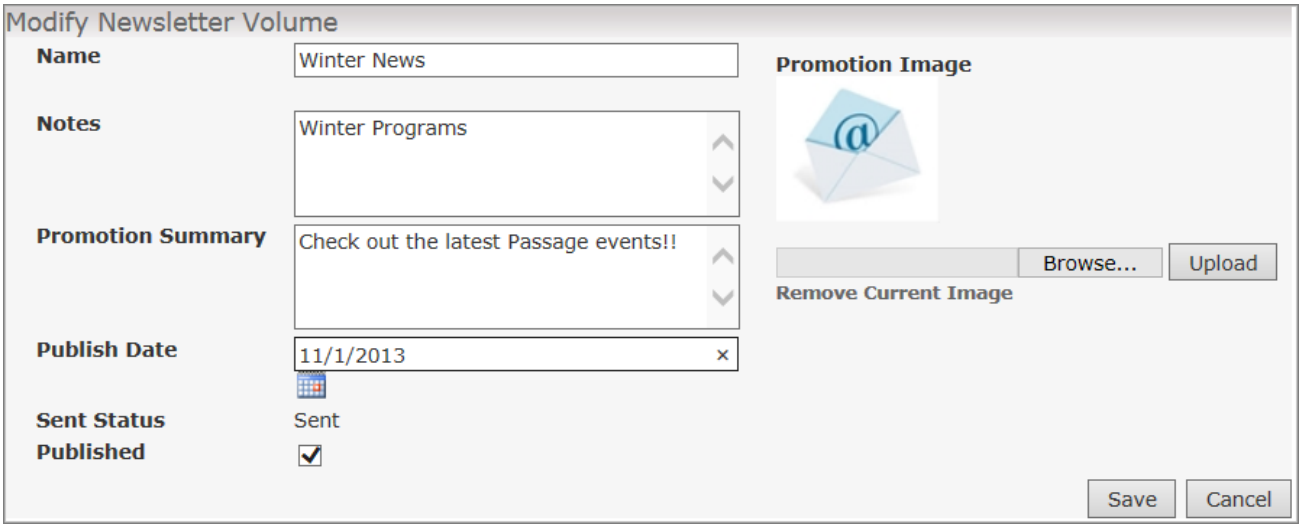
3. Click the **Save** button when finished.
4. Click the ***Newsletter Name*** link to open the Newsletter Details and view the Volume and Author Lists.

Newsletter Volumes

The Volume List shows the Publication Date, Volume Name, the number of Articles, Publications Status, Sent (via Email) status, the number of Reads, and a ***Preview*** link for each Volume created within the Newsletter selected.

Create a Newsletter Volume

1. Click the **Add New Volume** icon to add a new volume or issue. This creates a new entry named [new volume]. Click the **Edit** icon to open the Volume Details.



2. Complete all fields, as desired.
   - **Name** - Enter the name of this Volume.
   - **Notes** - Enter any additional description needed to identify this issue.
   - **Promotion Summary** – Enter a summary for the promotion.
   - **Publication Date** – Enter a publication date. This defaults to the Volume created date.
   - **Sent Status** - This is a system-generated field that shows the date the newsletter was sent (if it was), or it shows Not Sent.
   - **Published** - Select this check box to indicate you have published this Volume on the Arena-managed website.
   - **Promotion Image** - Click the **Browse** button to locate an image for the promotion of this Volume.
3. Click the **Save** button when finished.

Newsletter Author

Before you create Articles, you need to add at least one author. Below the Newsletter Volumes is the Author List that includes information about each author.

Create a Newsletter Author

1. Click the **Add New Author** icon. This creates an author named [new author].

2. Click the **Edit** icon to open the author page. The information you enter here displays on your organization's Arena-managed website for the Author information in the Article.

- **First Name** - Enter the first name of the Author.
- **Last Name** - Enter the last name of the Author.
- **Email** - Enter the email address for the Author.
- **Bio** - Enter the biographical information for the Author.
- **Source** - Click the drop-down list for the source of the Author. See your Arena Administrator to edit Sources.
- **Author Image** - Click the **Browse** button to locate an image for the Author. Click the **Upload** button to add it to the Author entry.

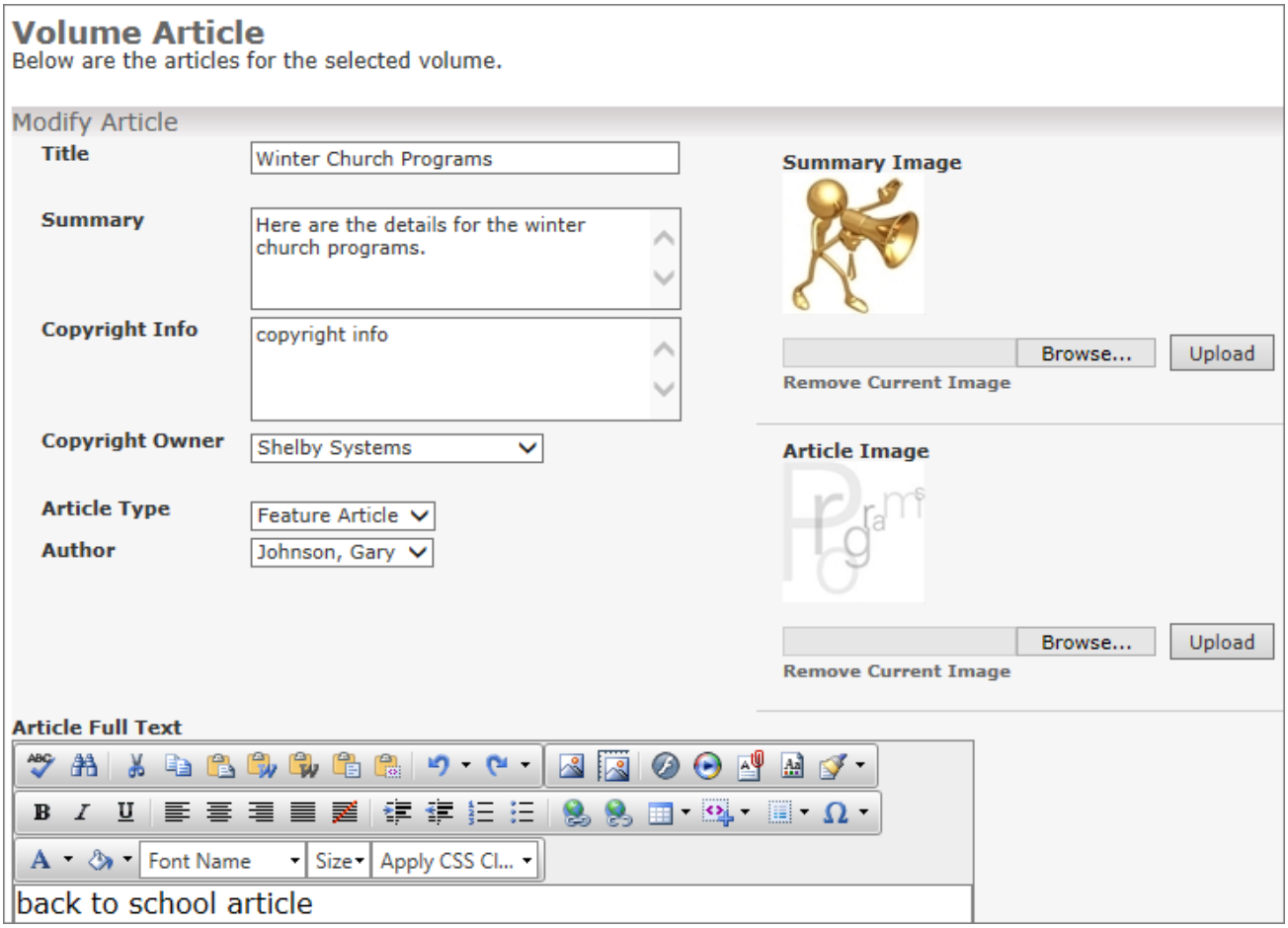
3. Click the **Save** button.

Newsletter Articles

The last part of the Newsletter features is where you create Art. The **Article List** page displays the Article Name, Average Score, the number of times the article was Read, a thumbnail for the Summary and Article images, Summary Word Count, and the Text Word Count.

Create a New Article

1. Click the **Add New Article** icon. This creates an entry named [new article].
2. Click the **Edit** icon to enter the article details.



- **Title** - Enter the title of the article.
- **Summary** - Enter a concise overview of the article that displays as the link to the article on the Arena- managed website.
- **Copyright Info** - Enter the details concerning copyright information relating to this article.
- **Copyright Owner** - Select the owner of the copyright from the drop-down list. You can customize options in the Newsletter Copyright Owner Lookup.
- **Article Type** - Select if this Article is a Feature Article or a Body Article. A Featured Article shows in the Volume Summary, and a Body Article only displays when users view the full Volume.
- **Author** - Click the drop-down list to select the author of the article. You can create the authors in the Newsletter Authors section.

- **Article Full Text** - Enter the full article in this field, using RAD editor functions as desired.
- **Summary Image** - Click the **Browse** button to associate a photo with a group of articles that are in the same category. Click the **Upload** button to include it in the article.
- **Article Image** - Click the **Browse** button to associate a photo with this specific article.

3. Click the **Upload** button to include it in the article.

4. Click the **Save** button.

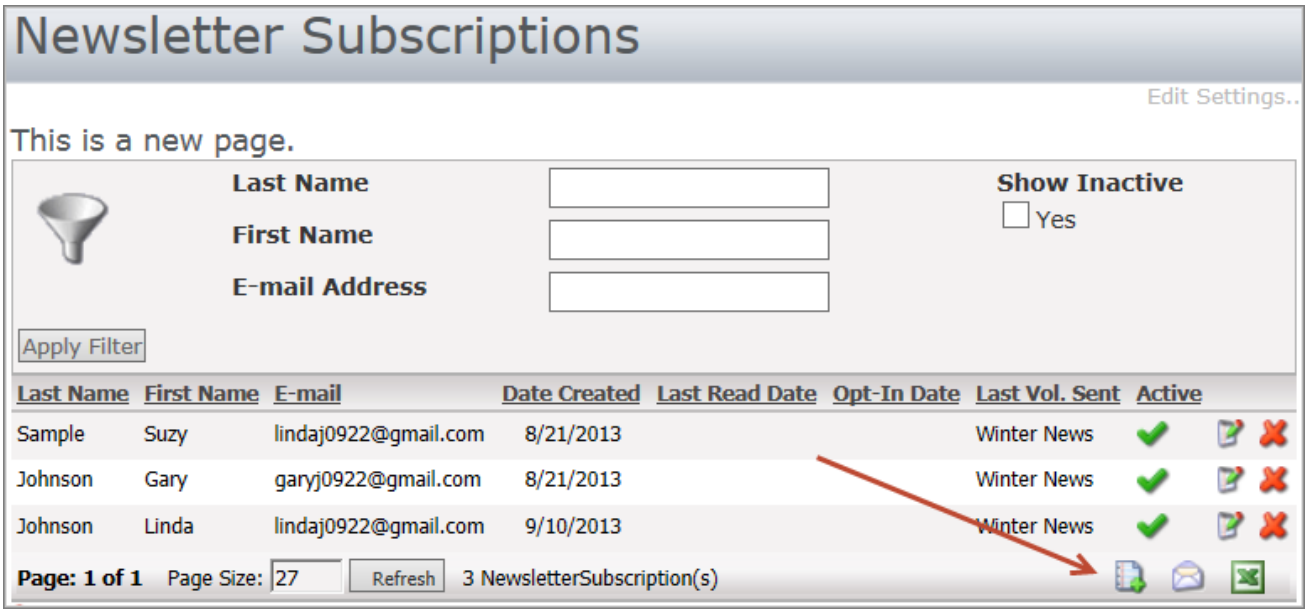
Add a Newsletter Subscriber

See your Arena Administrator if this option is not available.

1. Go to the **Newsletter** page.

2. Click the ***Number*** link in the Subscriber Count column.

3. Click the **Add Newsletter Subscription** icon.



4. Enter in the first name, last name and email address.

Last Name	First Name	E-mail	Date Created	Last Read Date	Opt-In Date	Last Vol. Sent	Active
Sample	Suzy	lindaj0922@gmail.com	8/21/2013			Winter News	✔
Johnson	Gary	garyj0922@gmail.com	8/21/2013			Winter News	✔
Johnson	Linda	lindaj0922@gmail.com	9/10/2013			Winter News	✔
John	Sample	john@gmail.com	11/28/2013				☑

Page: 1 of 1 Page Size: 27 Refresh 4 NewsletterSubscription(s)

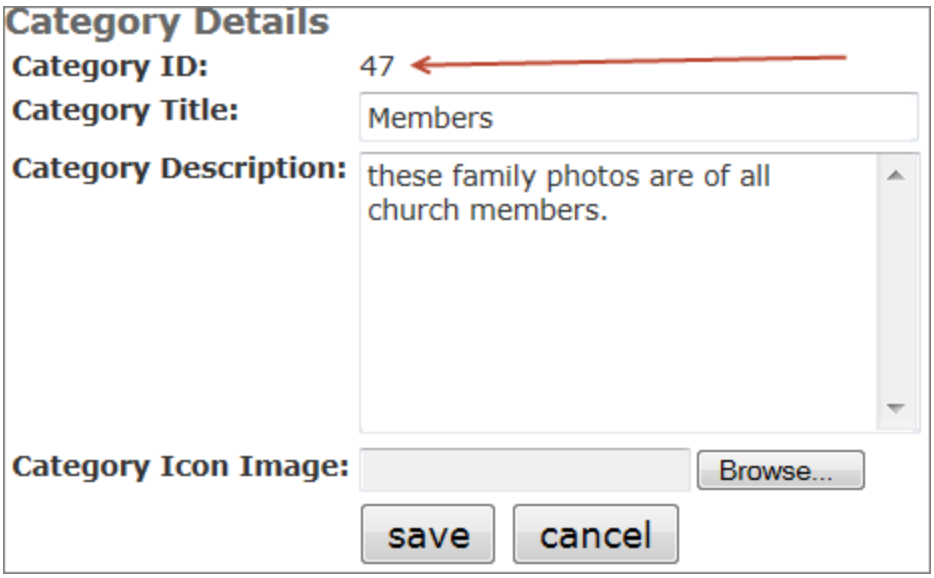
5. Click the **Update** icon. Arena does not add people entered on this page.

Photo Albums

The Photo Albums section of Web Content is where you can keep track and organize pictures that relate to your various ministries from membership to sports teams.

Add a Category

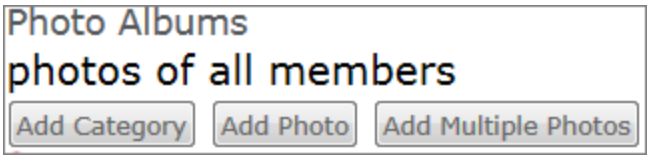
1. Click the **Add Category** button. This displays the **Category Details** page.
2. Complete fields and upload category photo, as desired.



- **Category ID** – Arena auto assigns a category to each album.
- **Category Title** - Enter the title for this Photo Category.

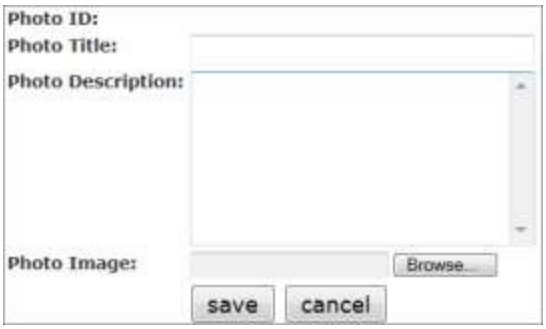
- **Category Description** - Describe the type of photos included in this Photo Category.
- **Category Icon Image** - Click the **Browse** button to associate an image with this Photo Category.

3. Click the **Save** button. Now you are ready to add photos to this category or add another category.



4. You can add a single or multiple photos.

Upload a single photo



Upload multiple photos

5. Once you upload photos, you can view, edit or delete an album.

6. Click the ***Category*** link to add photos or another category.

7. Click the **Delete** icon to remove this Category and any child Categories and Photos within.

8. Click the **Edit** icon to change the details of the Category or obtain the Category ID.

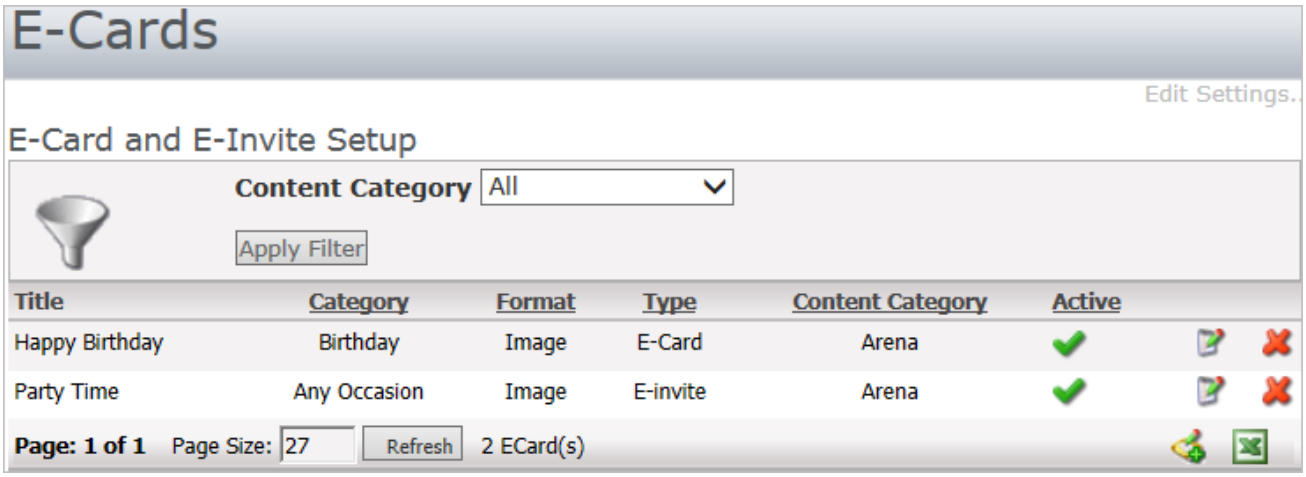
Sample Photo Album

9. Click a Photo Album to display the top Photo Category, which is All Photos, any Photo Categories setup under All Photos, and any loose Photos not under a child Category.

E-Cards

Use this feature to create e-Cards and e-Invitations and make available on your organization's Arena-managed website. Members can then send an email link to an e-Card or e-Invitation, which could be either an image or a Flash file. Since the E-Card and E-Invite templates are setup the same with the exception of one setting change, for the purposes of this guide we only look at E-Cards.

1. From the **Web Content** menu, click the **E-Cards** option to bring up the list of created E-Cards. This list shows the Title, Category, Format, Type, Content Category, and an Active Status indicator.

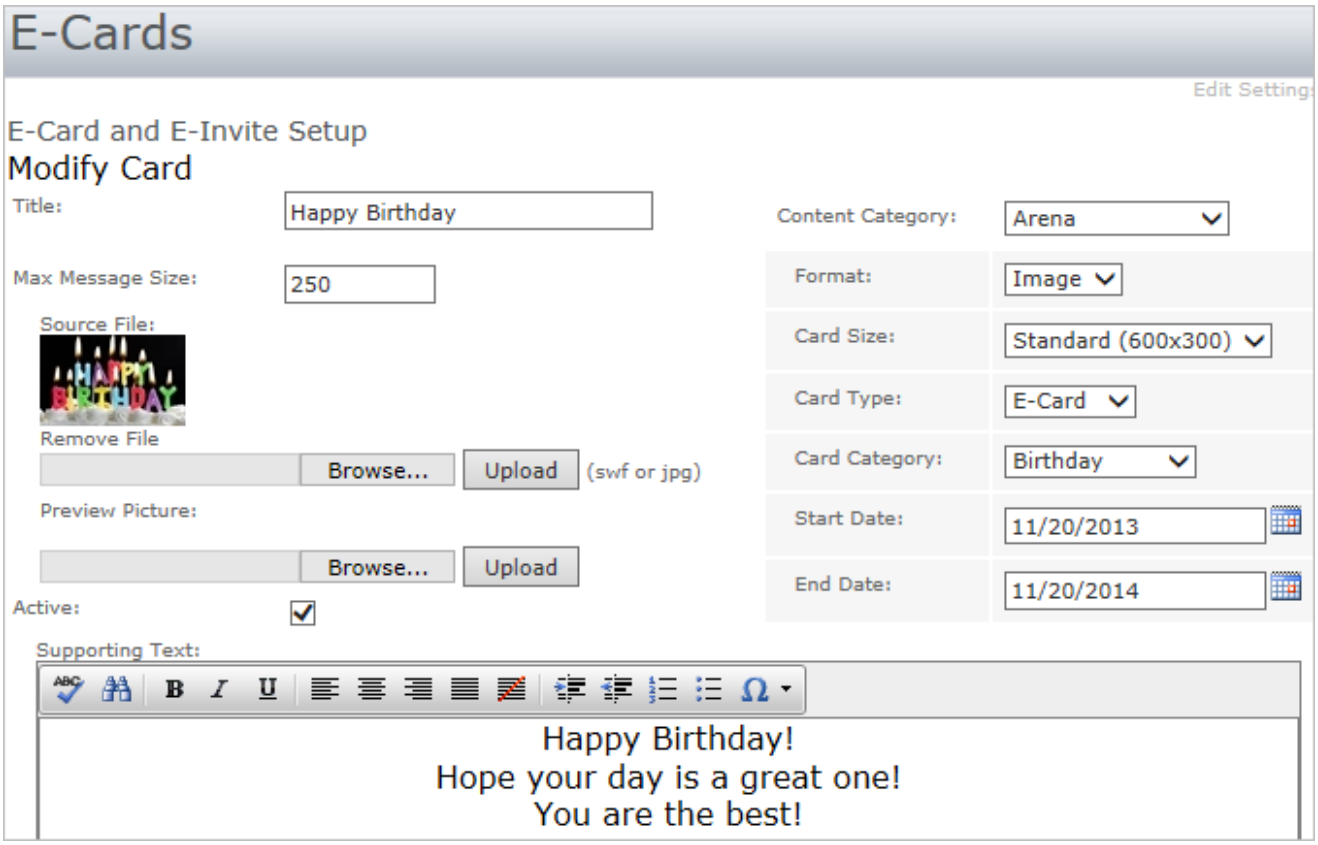


- **Title** – This is the title of the card or invite.

- **Category** – This is the E-Card Category defined in E-Card Category Lookup.
- **Format** – This identifies if the card is in image or flash format.
- **Type** – This is the type of card defined in the E-Card Type Lookup. E-Card and E-Invite are defaults types.
- **Content Category** – This is the Content Category, and defines where to display the card.
- **Active** – This indicates if a card or invite is active or inactive.

Create an E-Card

1. Click the **Add New E-Card** icon on the lower right to create an E-card.
2. Enter the appropriate fields or make the appropriate selections for your E-Card or E-Invite.



- **Title** - Enter a Title for the Card.
- **Max Message Size** – Change the message size, as desired. The default value is 250 characters.
- **Content Category** - Choose a Content Category for this Card. You can leave it blank.
- **Format** – Choose a format. Choose a Card Format for the image type. By default, Image

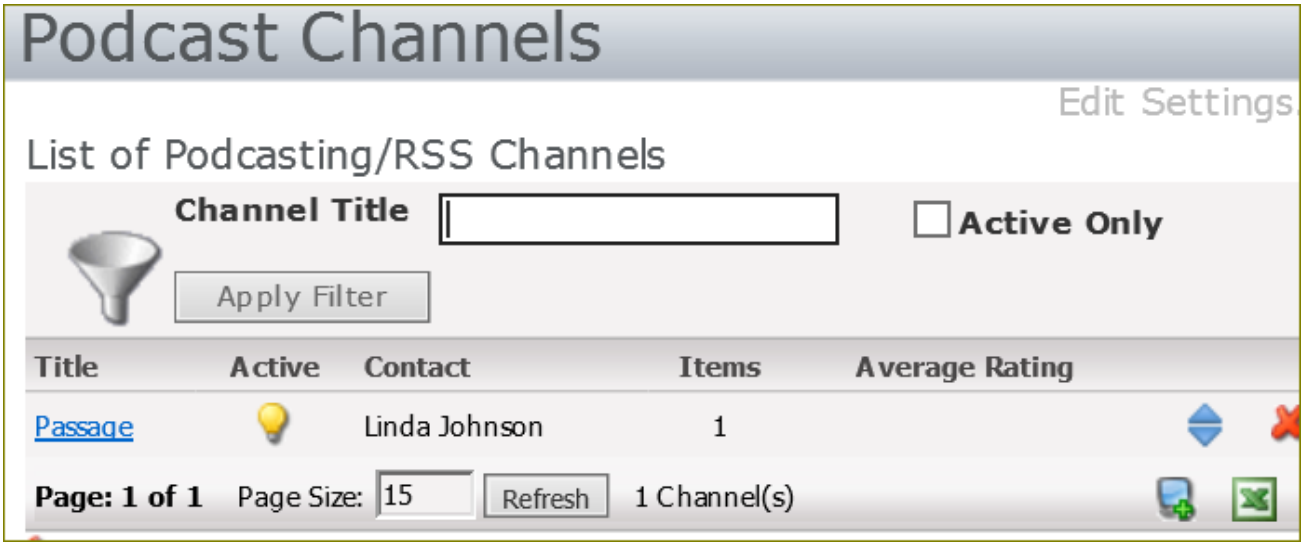
(.jpg files) and Flash (.swf files) already exist.

- **Card Size** – Select a card size. The Standard 600x300 pixels is the default value.
- **Card Type** - This is what determines if this card is an E-Card or an E-Invite.
- **Card Category** - This allows you to sort your cards into different Categories, such as Birthday, Holiday, Get Well, etc.
- **Start Date** – This is the starting date for the Card to be Active and therefore available for use on the Arena-managed website.
- **End Date** – This is the date the Card becomes inactive. If the current date is outside of this date range, then this card does not show on the website.
- **Card Source Image File** – This is the actual image for the Card. Click the **Browse** button to select and upload an image.
- **Card Preview Image File** - This can be the same as the Source Image or not. This allows you to have different size images, like a Thumbnail for the Category List module/control on the website and a larger image for the actual card.
- **Supporting Text** – Enter the text to display on this card, regardless of the actual message copy. This can be a scripture passage, an inspirational quote, or your own well wishes.

3. Click the **Save** button when finished.

Podcast Channels

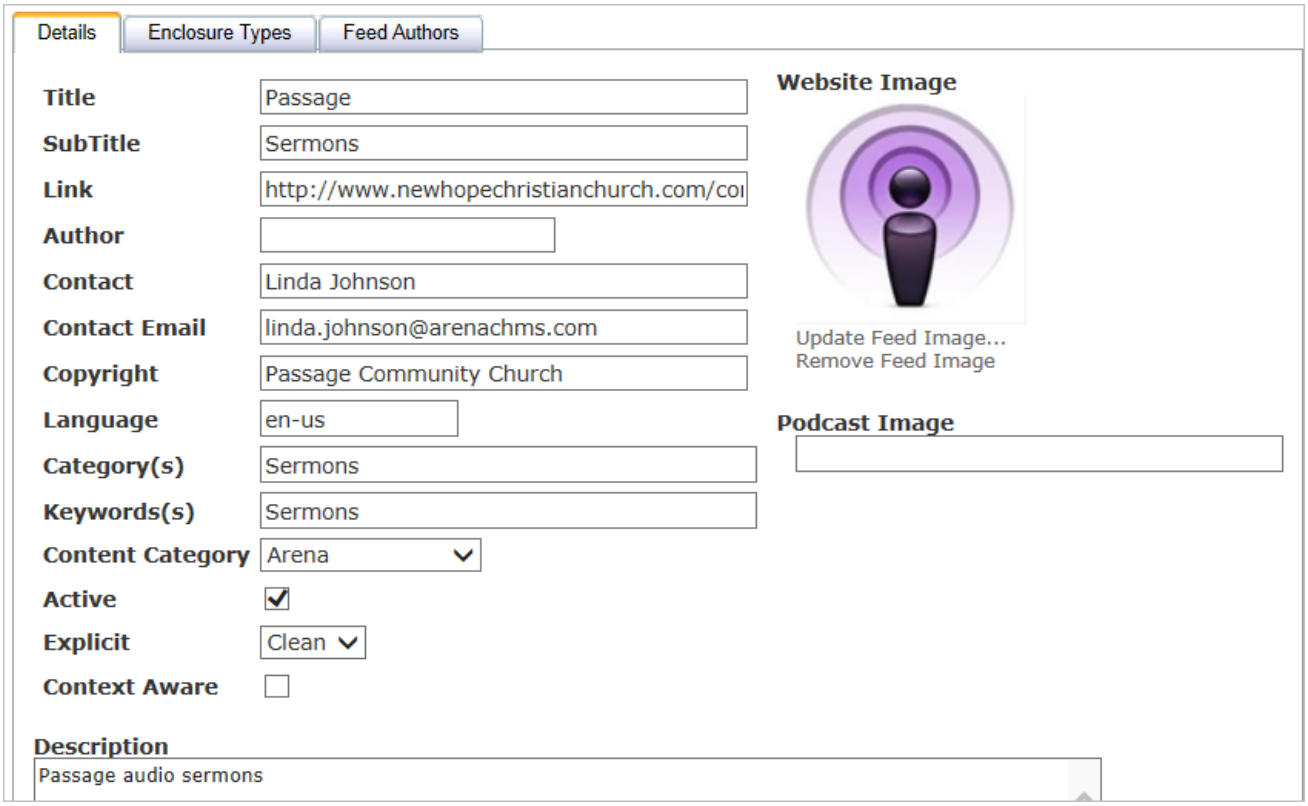
Podcasts are digital medium for RSS feeds. After Feed Formats are created, you can create Podcast Channels on this page to be available on your Arena-managed external website.



Add a Podcast Channel

1. Click the **Add New Channel** icon.

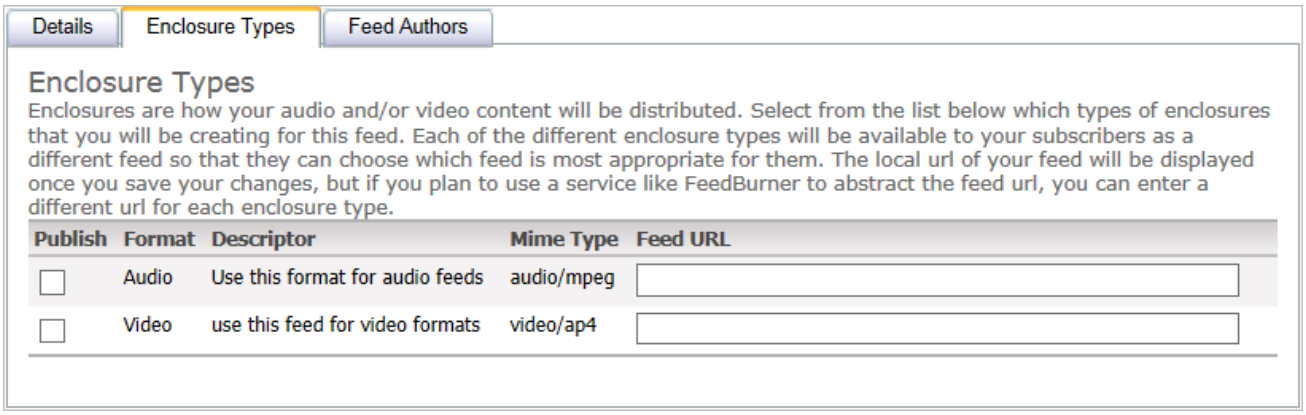
2. On the **Details** tab, enter all applicable information for this channel.



3. Enter a **title** for the podcast channel.

4. Enter a **subtitle** for the podcast channel.

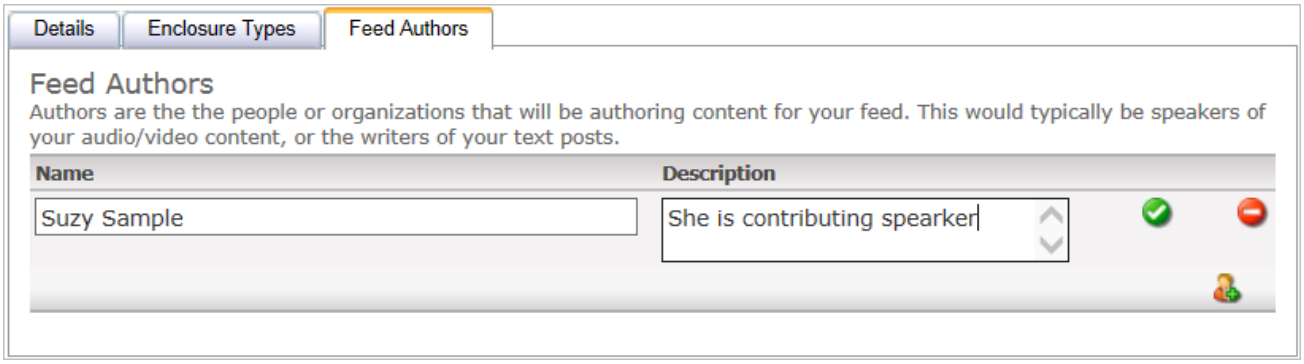
5. Enter the URL **link** for the podcast.
6. Enter an **author** for the podcast channel.
7. Enter a **contact** name for the podcast channel.
8. Enter a **contact email** for the podcast channel.
9. Enter a **copyright** information to display for the podcast channel.
10. Enter the **language** for the podcast channel.
11. Enter a comma-delimited list of **category(s)** for the podcast channel.
12. Enter a comma-delimited **keyword(s)** list for the podcast channel.
13. Select a **content category** for the podcast channel.
14. Select the **Active** check box to make this podcast channel available.
15. Select the **explicit** option for the podcast channel. Options are yes, no and clean.
16. Select the **Context Aware** check box for the podcast channel so that the podcast can adapt to the viewing environment.
17. Upload an **image** for the podcast or enter the image file path in the Podcast Image field. The image displays on the external Arena-managed website page for the podcast.
18. Enter a **description** for the podcast channel.
19. Click the **Enclosure Types** tab.



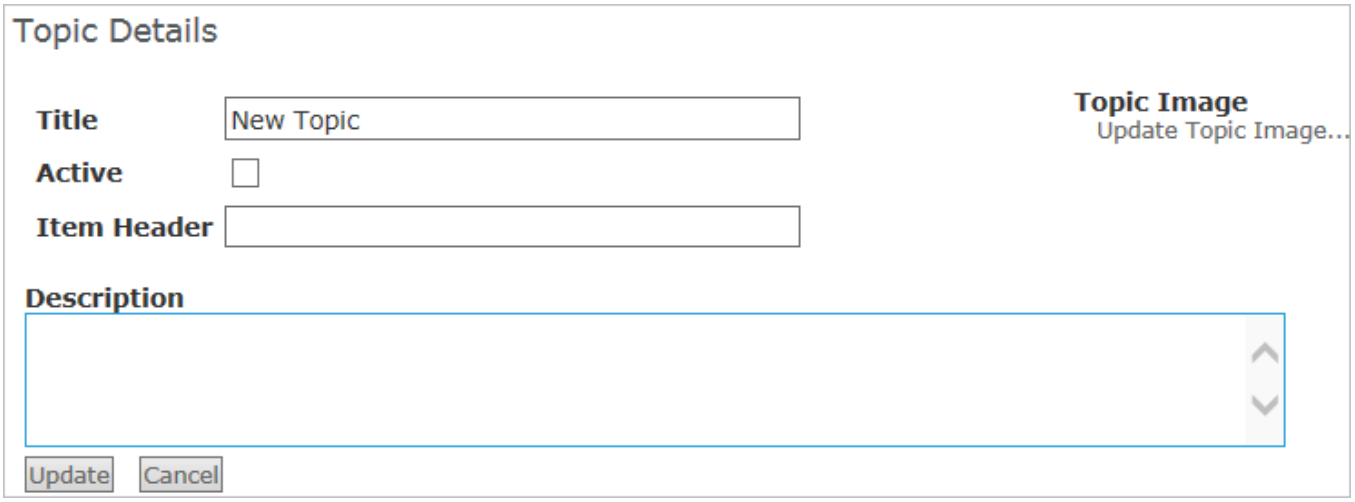
- **Publish** – Select this check box to select which Feed Formats to allow as enclosures for this channel (This example allows both Audio and Video).
- **Feed URL** – Enter the URL of a public site that offers forwarding services to abstract the feed URL (FeedBurner is an example of such a service). This is available if the select Feed

Format was setup for "Public Format", Arena allows you to point to the URL.

20. Click the **Feed Authors** tab. Use this tab to input the authors of the individual feeds for within this channel.

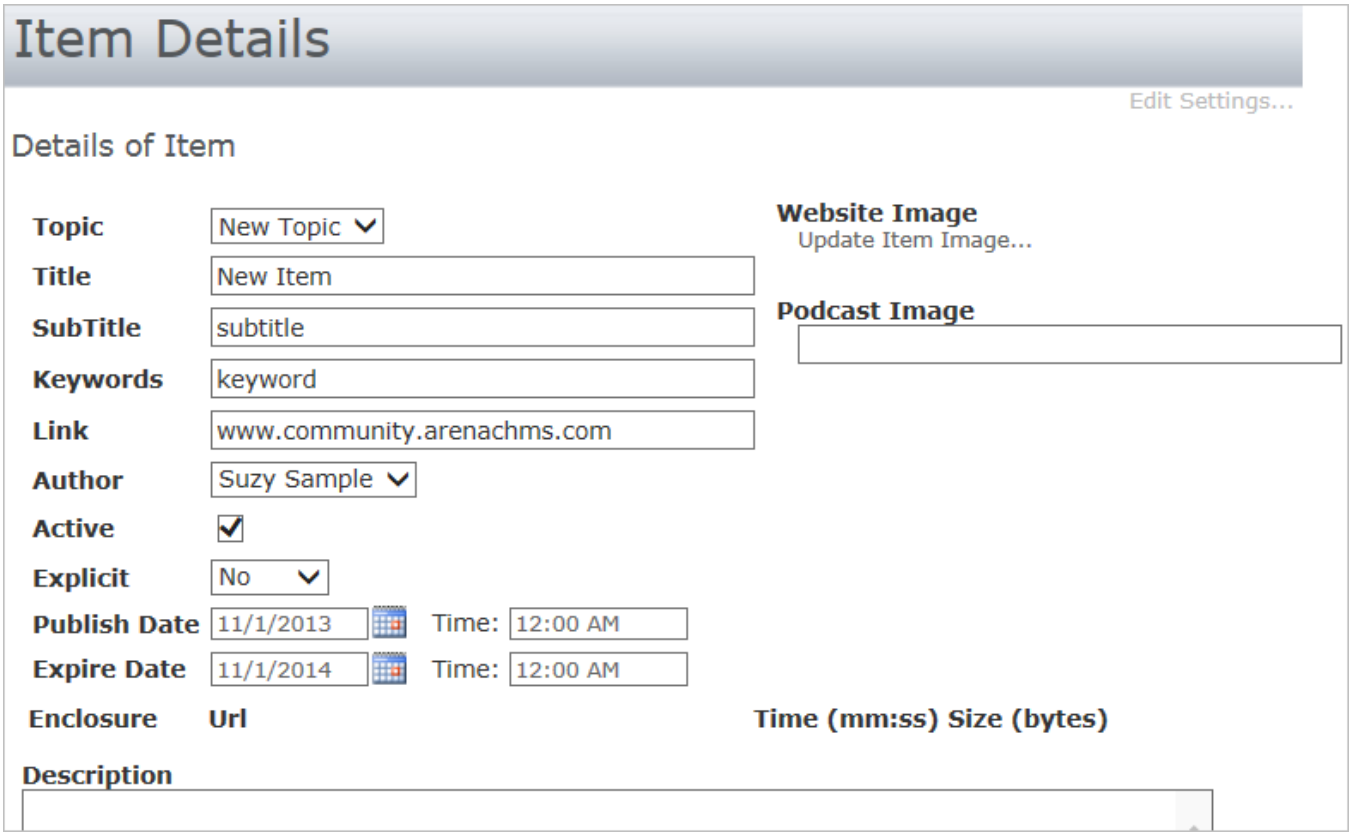


21. Click the **Topic** tab to add podcast topics. Topics are simple containers to group podcast items together for better organization. A list of topics created for a particular channel displays in a small window at the bottom of the **Channel Details** page. The only inputs are for a title and description of the topic, a check box for activation/deactivation, and an optional image upload for this particular topic.



22. Click the **Update** button. You can now add a Topic Item. Items are going to be the actual media files that are to be viewed for the podcasts. A list of them shows in a window at the bottom of the **Topic Details** page.

23. Click the **Item** tab to add a new item.



- **Topic** – Select a topic.
- **Title** – Enter a title to display for this item.
- **SubTitle** – Enter a subtitle to display for this item.
- **Keywords** – Enter a comma-separated list of keywords.
- **Link** – Enter the link for this Topic.
- **Author** – Enter the name to display as author of this item.
- **Active** – Select this check box to activate/deactivate this item.
- **Explicit** – Select description of the type of content in this item.
- **Publish Date** – Enter the date and time to start making the item available publicly.
- **Expire Date** – Enter the date and time to stop making item publicly available.
- **Enclosure/URL** – Enter the publicly hosted URL that contains the actual file. The URL must be in the URL box for the appropriate Enclosure type. If you know the length of the clip, enter it in MM:SS format in the Time block. This time displays in the feed. The size information automatically fills when you click the **Update** button and the item is fully setup. Arena attempts to find the file at the provided URL, then pull the file size of the item and populate the Size field.
- **Website Image** – You can upload an image to display with this item as it plays on your

external website

- **Podcast Image** – Input URL for publicly hosted image to display for this item.

24. Click the **Update** button.

25. Select the **Topic Title** for the **Topic Details** page.

Publishing Podcasts

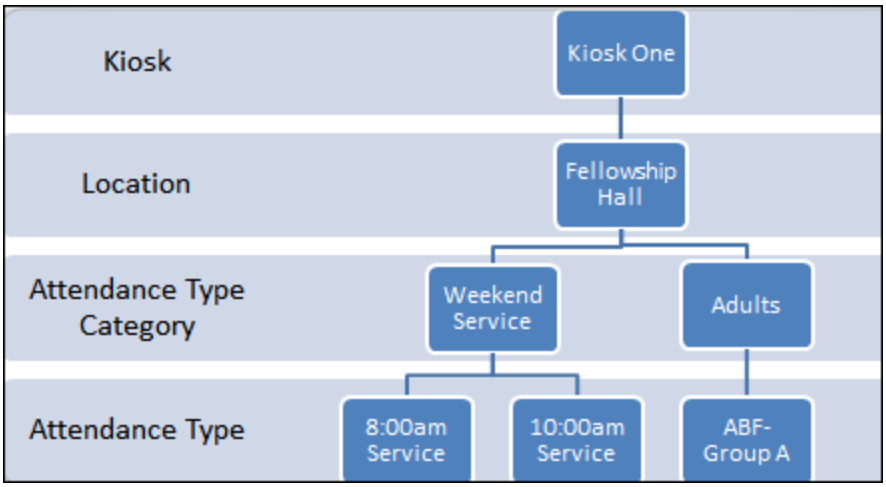
Once the feeds, channels, topics and items are properly setup, the RSS feed is ready to publish your podcasts. Each unique channel/feed combination is going to have its own RSS feed for which users can subscribe. The screenshot below shows this relationship.

Check-In

Arena's Check-In system is a detailed mechanism to ensure that the correct people end up in the correct classes using stand-alone computers with barcode readers and label printers. Ideally, you can use these stations without supervision to allow a quick and efficient check-in process for individuals and families. You can tie Check-In to a Small Group, Group Level, or Tag, or use as its own Attendance Type Category for manual check in. If you are using Arena Check-In and would like to allow non-family members to Check-In one another, your Administrator can create a Relationship Type containing the phrase "can checkin" (case insensitive, no quotes) that permits this action.

Arena Check-In Printing

When you self-host Arena, you can use the option to print from server that is connected to your printers. With a remotely hosted server, the print job must pass through a local windows program (CheckIn Run Once App) that can provide a user name and password to the printer. Apple, Android and IOS devices cannot run Windows applications and therefore cannot pass the print job. When using an iPad you are running CheckIn via a browser not the CheckIn windows application.



If Arena is self-hosted and you would like to print labels from a table, you have the option to print from the server that connects to your printers. With a remotely hosted server, the print job must pass through a local windows program (CheckIn Run Once App) that can provide a user name and password to the printer. Apple, Android and IOS devices cannot run Windows applications and therefore cannot pass the print job. When using an iPad you are running CheckIn via a browser not the CheckIn windows application therefore does not have the option to print a label. (Based on this release, the Windows tablet of choice should be running Windows 8.1 Professional and not RT.)

Self-hosted customers can choose to print from a CheckIn workstation or from a network printer on the local arena network (LAN). The print from server option is required when using a

non-Windows computer i.e.: iPad, Android tablet or MAC.

Remote hosted customers must select print from the CheckIn workstation. With a remotely hosted server, the print job must pass through a local windows program (CheckIn Run Once App) that can provide a user name and password to the printer. Apple, Android and IOS devices cannot run Windows applications and therefore cannot pass the print job. When using an iPad or other non-windows operating system you are running CheckIn via a browser, not the CheckIn windows application.

Once you evaluate check-in needs for your organization, follow the below steps to set up Check-In. Each step is explained below.

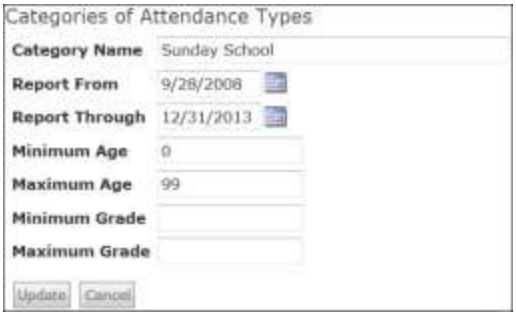
- Create Locations.
- Create Attendance Type Categories. How you organize Attendance Type Categories and Attendance Types impact attendance reporting.
- Create Attendance Types that represent the classes, events and meetings. The name of the Attendance Type displays on the Check-In screen. Every Attendance Type that uses an age range or birthdate requires everyone using the Attendance Type to have a complete birthdate **MMDDYYYY** on their record. If using grade, the person needs to have grade on their record.
- Create frequencies. There must be a Frequency setup for the Attendance Type in order for Arena to create Occurrences. The Occurrence allows a person to check in to the Attendance Type. You can set frequencies for an Attendance Type or at the Attendance Type Category level and mark applicable Attendance Types. The Check In start and end times dictate when the class is available while the Class Start and Class End time create the times for the Occurrence itself.
- Set labels. You can set labels for an individual Attendance Type or at the Attendance Type Category level and select applicable Attendance Types.
- Add kiosks/computers, set kiosk schedules, and printers. There must be at least one Kiosk and kiosk schedule. Arena reads the schedules for each kiosk to determine what to display. You can add each kiosk manually or by launching the Check-In Application on the kiosk, which is the recommended method. Doing so generates a schedule for every day, from 12:01AM to 11:59PM, which you can customize. You can then assign Locations for the kiosk.
- If your organization is using barcode scanners, verify applicable drivers are installed. Shelby supported scanners are listed here.

Attendance Type Categories

Attendance Types define the parameters of the 'class' such as the age or grade range. Each Attendance Type must have one or more frequency, which defines the specific time that attendance type is active. You can assign a group or tag to an Attendance Type, indicating the occurrences are created for the attendance type. Frequencies determine the availability of the Attendance Type. An attendance type can only be associated with a single group or tag, but a single group or tag may have multiple attendance types assigned to it. When managing a large number of attendance types, setting the frequencies and labels for each attendance type can be time consuming. Consider setting frequencies and labels at the Attendance Type Category level.

Add an Attendance Type Category

1. From the **Check-In** menu, click the **Attendance Type Categories** option.
2. Click the **Add New Attendance Type Category** icon.



3. Complete available fields, as desired.
   - **Category Name** – Enter the name for this category.
   - **Report Form** – Enter the default begin date for this Attendance Type Category. The date value you enter applies when displaying the Attendance Type Category chart and attendance data.
   - **Report Through** – Enter the default end date for this Attendance Type Category. The date value you enter applies when displaying the Attendance Type Category chart and attendance data.
   - **Minimum Age** – Enter the minimum age for this Attendance Type Category, if applicable. If there is not an applicable age range, enter "0." You can use either Age or Grade, not both.
   - **Maximum Age** – Enter the maximum age for this Attendance Type Category, if applicable.

If there is not an applicable age range, enter "0."

- **Minimum Grade** – Enter the minimum grade for this Attendance Type Category, if applicable.
- **Maximum Grade** – Enter the maximum grade for this Attendance Type Category, if applicable. You can use either Age or Grade, not both.

4. Click the **Update** button to save the settings. Click the **Edit** icon if you need to change the details of a Category. Click the **Delete** icon to the delete the category. To delete an Attendance Type, you must first delete all associated Occurrences, Labels and Frequencies.

5. You are now ready to create Attendance Types.

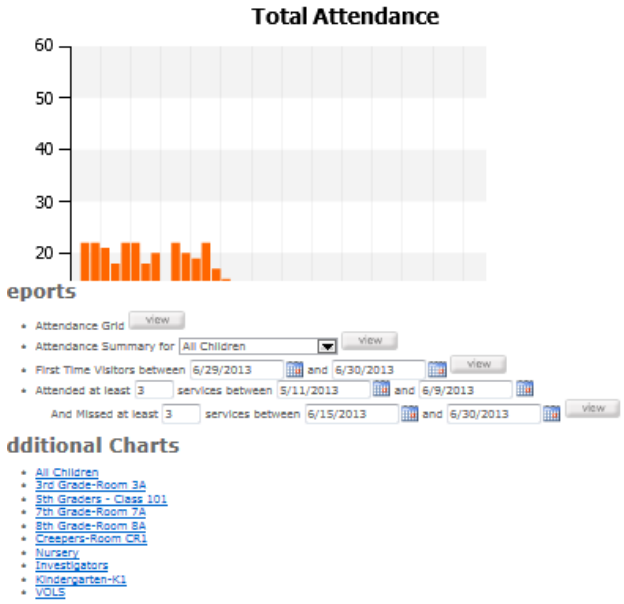
Categories of Attendance Types

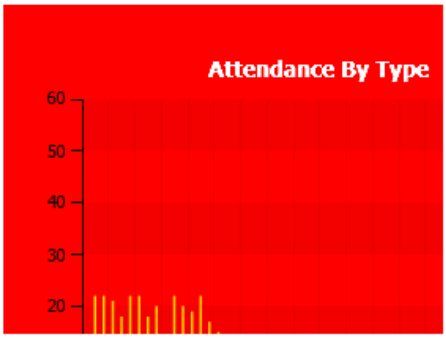
Category Name	Report From	Report Through	Minimum Age	Maximum Age	Minimum Grade	Maximum Grade			
Attendance			0	999	0	999	Labels	Frequency	Attendance Types
Small Groups	1/1/2013	12/31/2025	0	0	0	0	Labels	Frequency	Attendance Types
Nursery	1/1/2013	12/31/2025	0	3	0	0	Labels	Frequency	Attendance Types
Preschool	1/1/2013	12/31/2025	3	7	0	0	Labels	Frequency	Attendance Types
Elementary	1/1/2013	12/31/2025	0	0	0	5	Labels	Frequency	Attendance Types

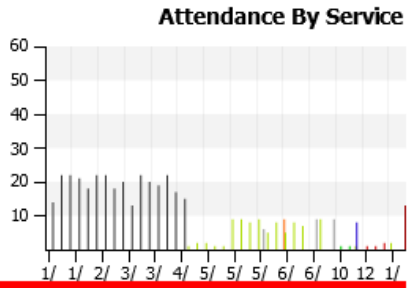
Page: 1 2 of 2 Page Size: 5 Refresh 10 Attendance Type Category(s)

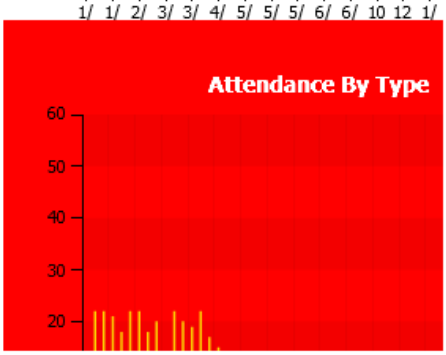
- **Category Name** – This column displays the name of the Category.
- **Report From and Through** – These columns display the date range for the category.
- **Minimum and Maximum Age** – These columns display the age range for the category.
- **Minimum and Maximum Grade** – These columns display the grade range for the category.
- **Labels** – This is the link to labels for the category.
- **Frequency** – This is the link to frequencies for the category.
- **Attendance Types** – This link is to the Attendance Types associated with the category.

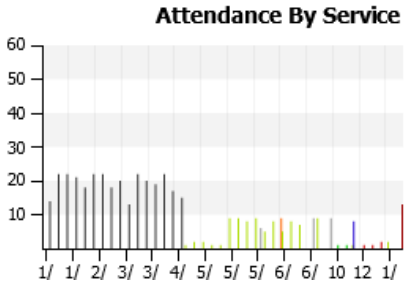
6. Click an ***Attendance Type Category*** link to display metrics for Check-In. You can also click the links for Additional Charts to view Metrics for a specific Attendance Type.







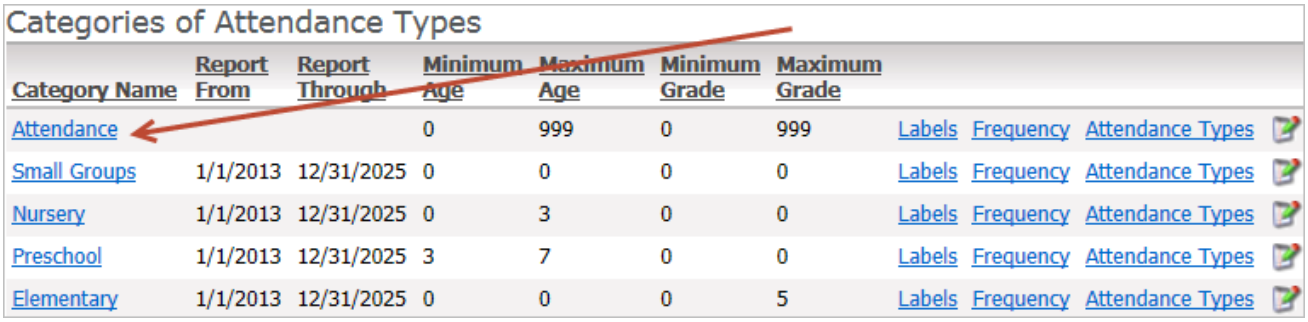




Check-In Reporting

You can access Attendance reporting by clicking the ***Category Name*** link on the **Attendance Type Category** page.

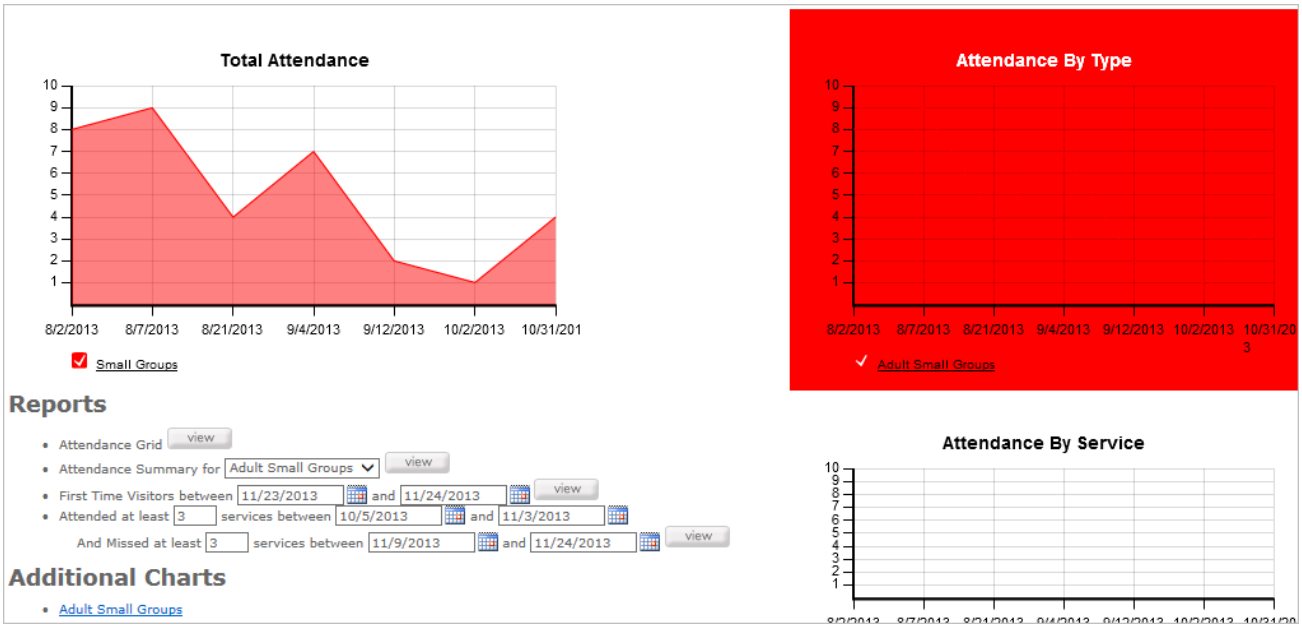
Attendance Type Categories



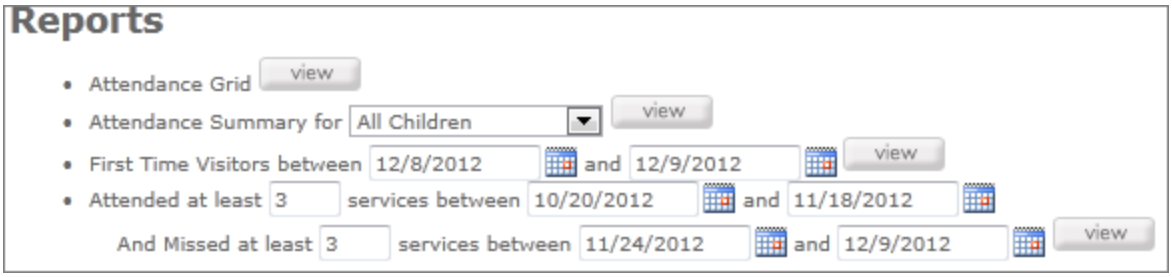
Categories of Attendance Types

Category Name	Report From	Report Through	Minimum Age	Maximum Age	Minimum Grade	Maximum Grade			
Attendance			0	999	0	999	Labels	Frequency	Attendance Types
Small Groups	1/1/2013	12/31/2025	0	0	0	0	Labels	Frequency	Attendance Types
Nursery	1/1/2013	12/31/2025	0	3	0	0	Labels	Frequency	Attendance Types
Preschool	1/1/2013	12/31/2025	3	7	0	0	Labels	Frequency	Attendance Types
Elementary	1/1/2013	12/31/2025	0	0	0	5	Labels	Frequency	Attendance Types

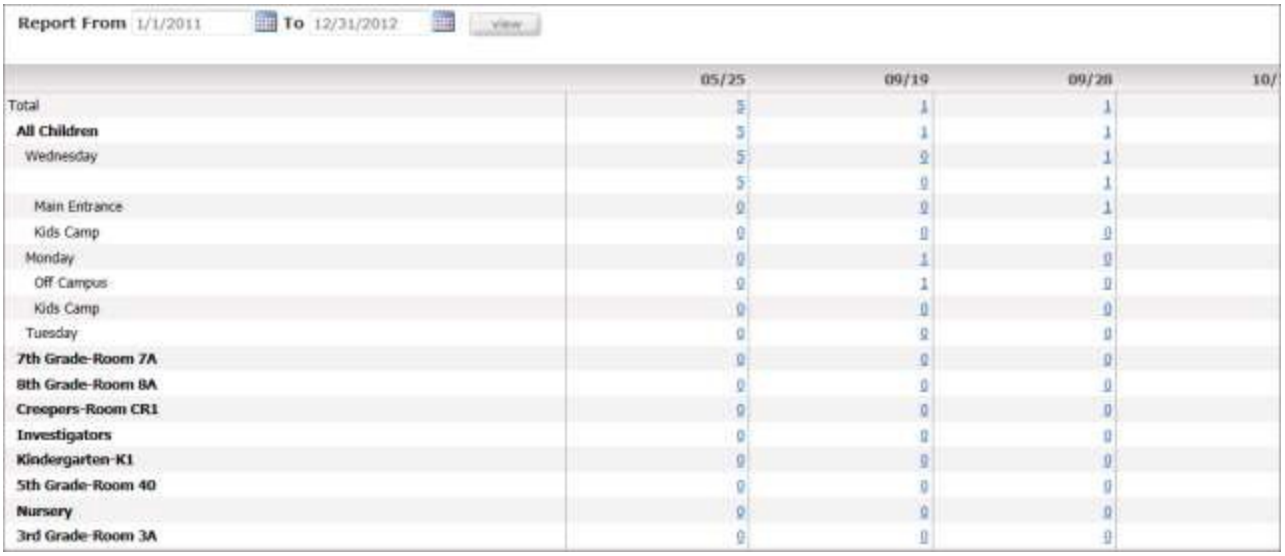
Attendance Type Category Reports



Attendance Type Category Reporting Options



Attendance Grid – Displays a grand total of attendees per class. Clicking the ***Number*** link displays the records of those who were present.



Report From 1/1/2011 To 12/31/2012 View

	05/25	09/19	09/28	10/
Total	5	1	1	
All Children	5	1	1	
Wednesday	5	0	1	
	5	0	1	
Main Entrance	0	0	1	
Kids Camp	0	0	0	
Monday	0	1	0	
Off Campus	0	1	0	
Kids Camp	0	0	0	
Tuesday	0	0	0	
7th Grade-Room 7A	0	0	0	
8th Grade-Room 8A	0	0	0	
Creepers-Room CR1	0	0	0	
Investigators	0	0	0	
Kindergarten-K1	0	0	0	
5th Grade-Room 4O	0	0	0	
Nursery	0	0	0	
3rd Grade-Room 3A	0	0	0	

Attendance Summary – Displays a grid of the dates this Attendance Type Category met, and the attendance records of the members.

First Name
Last Name
Gender All
Apply Filter
Report From 1/1/2008 To 1/31/2008

Name	Home Phone	Gender	Birth Date	Weekly 1/6/2008	Weekly 1/13/2008	Weekly 1/20/2008	Weekly 1/27/2008	Age	First Time	Last Time	Total	
Williams, Brenda	(901) 555-3145	F	11/20/1967		✔	✔	✔	45	1/13/2008	1/27/2008	3	75 %
Taylor, Beth	(901) 366-2867	F	9/10/1963	✔	✔	✔	✔	49	1/6/2008	1/27/2008	4	100 %
Dobrunk, Sophie H	(901) 982-1963	F	5/23/1967	✔	✔	✔	✔	45	1/6/2008	1/27/2008	4	100 %
Rogers, Grace	(901) 555-7463	F	8/20/1967	✔	✔	✔	✔	45	1/6/2008	1/27/2008	4	100 %
Ricardo, Lucille	(901) 555-8666	F	11/3/1964	✔	✔	✔	✔	48	1/6/2008	1/27/2008	4	100 %
Newman, Nan	(901) 366-8306	F	8/27/1965		✔	✔	✔	47	1/13/2008	1/27/2008	3	75 %
Moak, Pat	(901) 362-4215	F	8/20/1962		✔	✔	✔	50	1/13/2008	1/27/2008	3	75 %

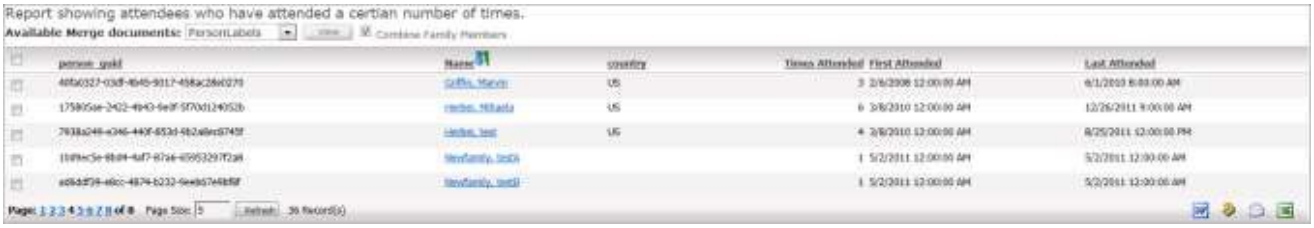
First Time Visitors – Displays the records where the first visit date falls between the date ranges.

Report listing names of people who attended for the first time.
Available Merge documents: PersonLabels View Combine Family Members

person_guid	Name	country	Times Attended	First Attended	Last Attended
b638a24-6390-41ac-9060-4b08162ab773	Adams, Ellen	US	1	4/21/2010 12:00:00 AM	4/21/2010 12:00:00 AM
dca16ae2-80b4-4a39-9a8b-53859b03836d	Adams, Ellen	US	1	4/21/2010 12:00:00 AM	4/21/2010 12:00:00 AM
646d7afb-0e16-47e3-9d24-b787e3458429	Adams, Ron	US	1	3/11/2010 12:00:00 AM	3/11/2010 12:00:00 AM
a57d744c-08c8-482b-97a3-7eea7239408b	Adams, Norman		1	4/30/2009 12:00:00 AM	4/30/2009 12:00:00 AM
673b3568-9a76-4306-acbc-4c28a69ed583	Alexander, Charles	US	1	3/11/2010 12:00:00 AM	3/11/2010 12:00:00 AM

Page: 1 2 3 4 5 6 7 8 9 10 ... of 21 Page Size: 5 Refresh 103 Record(s)

Missed at least and Attended at least – Displays the records meeting the supplied criteria.



Report showing attendees who have attended a certian number of times.
Available Merge documents: PersonLabels View Combine Family Members

person_guid	Name	country	Times Attended	First Attended	Last Attended
46fa0327-03df-4b49-9017-498a28b0270	Griffin, Marvin	US	3	2/6/2008 12:00:00 AM	6/1/2010 8:00:00 AM
175805ae-2422-4943-9e8f-5f70d124052b	Herbe, Mikaela	US	6	2/8/2010 12:00:00 AM	12/26/2011 9:00:00 AM
7938a249-e346-443f-852d-4b2a8ec0745f	Herbe, test	US	4	2/8/2010 12:00:00 AM	8/25/2011 12:00:00 PM
1b89ec5e-8b84-4af7-87a4-d3953297f2a8	NewFamily, testA		1	5/2/2011 12:00:00 AM	5/2/2011 12:00:00 AM
ad8dd59-46cc-4874-b232-9e4b574d8bf	NewFamily, testB		1	5/2/2011 12:00:00 AM	5/2/2011 12:00:00 AM

Page: 1 2 3 4 5 6 7 8 of 8 Page Size: 5 Refresh 36 Record(s)

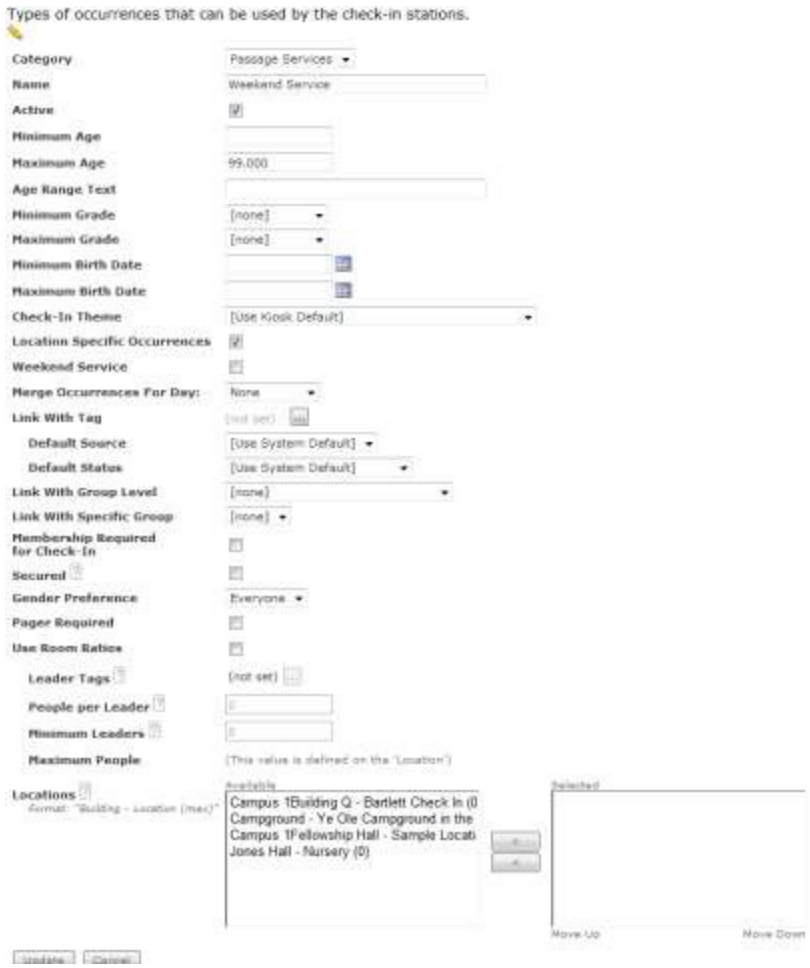
Attendance Types

Attendance Types refer to the different people checking in. Attendance types define the parameters of the 'class' the user is checking in to, such as the age or grade range. You can assign an Attendance Type to a group or tag. An attendance type can only be associated with a single group or tag, but a single group or tag may have multiple attendance types assigned to it.

Each attendance type must have one or more frequency, which defines the specific time that the attendance type is active. The frequency/frequencies of an attendance type are separate from the kiosk's schedule(s) and define when the attendance type is active on all kiosks. Frequencies are used by the Create Occurrences Agent to automatically create occurrences for any attendance types that do not already have existing occurrences for the specified times.

Create a New Attendance Type

1. Click the ***Add*** link to create a new Attendance Type. For additional Attendance Types, click the **Add New Attendance Type** icon.
2. Complete all fields, as desired.



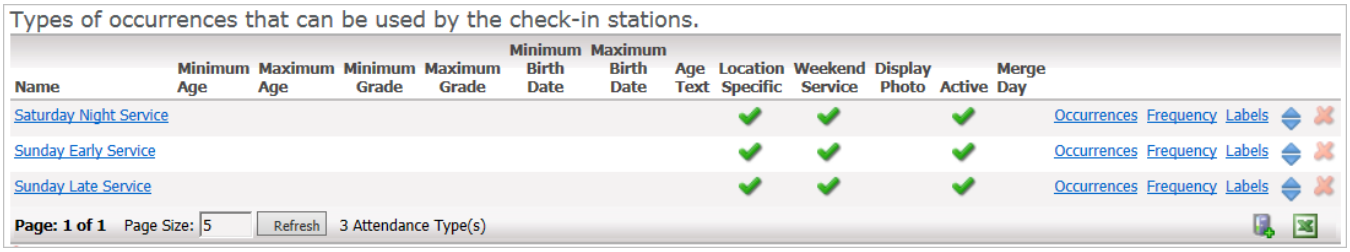
- **Name** – Enter a name for the Attendance Type. This displays at Check-In.
- **Active** – Select the **Active** check box if the Attendance Type is active. Check-In displays only active Attendance Types.
- **Minimum/Maximum Age** – Enter a minimum and maximum age for this Attendance Type, if desired. Setting age restricts so that only records that meet the set age are able to check-in. Setting the age range to 0-0 ignores ages. Setting the age range to any other range would require all records checking in to have a complete date of birth **MMDDYYYY** format. Use ".99" to end the age range. If your age range is 6 to 7 year olds, enter 7.99 to include ALL 7 year- olds. Enter "0.5" for 6-months old.
- **Age Range Text** – Enter the field name of the Age Range text, if desired. Examples might be "six-months of age" or "crawlers."
- **Minimum/Maximum Grade** – Enter the minimum and maximum grade for this Attendance Type, if desired. You can use Age or Grade, not both.
- **Minimum/Maximum Birthdate** – Enter the birthday in **MMDDYYYY** format for situations such as classes for children of less than 6-months in age and children ages 6-months to 1 year of age.
- **Check-In Theme** – Select a theme. Leave it at [Use Kiosk Default] if you are not using a

kiosk. Otherwise, choose which theme you want to use for this Attendance Type.

- **Location Specific Occurrence** – Select this check box if you want Arena to generate one occurrence for each Location selected for the Attendance Type (at the bottom of the page). Use this option if it is important to know where they checked in. It is also used in conjunction with room ratios to control the number of people in a room/location. If you do not select this option then you get totals across all kiosks when viewing Total Attendees.
- **Weekend Service** – Select this check box to indicate if the Attendance Type applies to weekends. Any Attendance Type with this checked populates on the Attendance Rate graph on the Person Detail page.
- **Merge Occurrences for the Day** – Select a day if you have multiple occurrences within the same day. The attendee total combines across all occurrences. If set to "none", the attendance shows separately for every occurrence for the Attendance Type. If it is set to any day of the week, Arena merges all occurrences for the Attendance Type, for the week into a single representation on that selected day. For example, if an Attendance Type is set to Thursday and an occurrence is created for Friday, it shows as Thursday because Arena looks backwards.
- **Link with Tag/Group Level/Specific Group** – Select a Tag or Group, if desired. By selecting a specific Tag or Group, Arena records occurrences for your Tags or Groups. If you plan to use a Specific Group, you must choose the Parent Group under Link with Group Level. If using manual attendance for multiple groups or tags, it is not necessary to select a Tag or Group.
- **Membership Required** – Select this check box to require only Members to check in to the specified class/group. When using this option, records need to be inactive in the group or active and connected in the tag. If this is unchecked, the person needs to meet other criteria set for the Attendance Type and the person is added to the Group/Tag after checking them in. If this is marked, the Attendance Type is not available for Family Registration (visitors) (Self-hosted only).
- **Secure** – Select this check box if occurrences of this type are only available to non-centralized kiosks. This is only available for the Kiosk when in Non-Centralized mode.
- **Gender Preference** – Use this to limit records to a specific gender type.
- **Pager Required** – Select this check box if you are using pagers at time of Check-In or would like to identify people by a manually entered code.
- **Room Ratios** – Select this check box to open and close occurrences based on the number of people checked in for this attendance type.
- **Leader Tag** - This identifies people from Tags that are eligible to check in as leaders of the class.

- **People per Leader** – Enter the number of people who can check in for every leader who checks in.
- **Minimum Leaders** – Enter the minimum number of people that can check in before the class opens. If set to "0", then the next class (if available) automatically opens, if one fills up.
- **Maximum People** – Enter the maximum people or define this value in Locations.
- **Locations** – Select the locations for this Attendance Type. Keep in mind Arena creates an occurrence for every location.

3. Click the **Update** button to save your settings.



- **Name** – This column displays the Attendance Type links.
- **Minimum and Maximum Age** – These columns display the age range for the attendance types.
- **Minimum and Maximum Grade** – These columns display the grade range for the attendance types.
- **Age Text** – This column displays the age in a text format.
- **Location Specific** – This column displays a **Check Mark** ✔ icon if the attendance type is only location specific.
- **Weekend** – This column displays a **Check Mark** ✔ icon if the attendance type is for weekends only.
- **Display Photo** – This column displays a **Check Mark** ✔ icon if the attendance type is to display a photo.
- **Active** – This column displays a **Check Mark** ✔ icon if the attendance type is active.
- **Merge Day** – This column displays a **Check Mark** ✔ icon if the attendance type merges occurrences for the day.
- **Occurrences** – Click this link to display all occurrences for the attendance type.
- **Frequency** – Click this link to display all frequencies, including shared, for the attendance type.
- **Labels** – Click this link to display label(s) associated with the attendance type.

- **Reorder** icon – Click and hold the **Reorder** icon to change the order in which the attendance types display.
- **Delete** icon – Click the **Delete** icon to delete an attendance type. You can delete Attendance Types and Attendance Type Category that do not have occurrences.

4. Repeat this process if you have other Attendance Types for this Category.

Frequency

Frequency is the time(s) that the Attendance Type is available for Check-In, and the actual meeting times of the Attendance Type. Make multiple classes available at the same time, location and kiosk using Frequency.

As you think about each check-in scenario, it is also valuable to know Arena can be setup so attendees can check-in to all Attendance Types available for the day at one time. For example if the same class is offered at 8:00am and 10:30am and it is optional to attend the class twice, you can make them both available at 8:00am. To accommodate this, you can create two different frequencies where the second class Check-In Start Time is the same as the first class as shown below. You can create multiple frequencies for an attendance type, if desired.

Name	Attendance Type(s)	Frequency	Frequency Details	Start Time	End Time	Check-In Start Time	Check-In End Time	Shared
Early class		Weekly	Sunday	8:00 AM	9:15 AM	7:30 AM	9:15 AM	✓
Late Class		Weekly	Sunday	10:30 AM	11:45 AM	7:30 AM	11:30 AM	✓

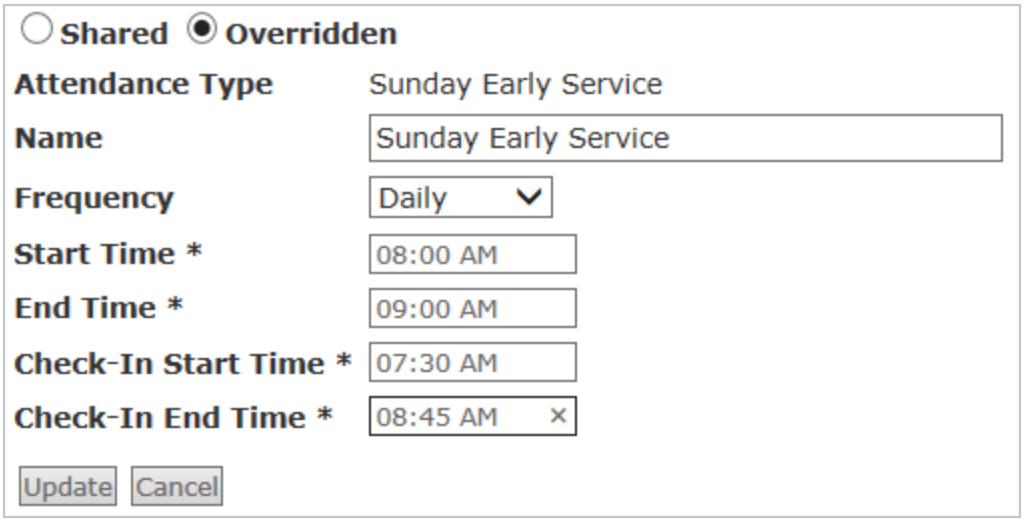
Page: 1 of 1 Page Size: 12 Refresh 2 Attendance Frequency(s)

If the desire is to make Attendance Types (classes) only available at a specific time then you would set the Start Time only before the specific class.

Create a Frequency

1. Click the ***Add*** link to create the first frequency for a type, or click the **Add New Frequency** icon to add an additional Frequency.

2. Complete all fields.



- **Name** – Enter the name for the frequency.
- **Frequency** – Select the applicable regularity for the Attendance Type. If you select Weekly, select the Day of the Week. If you choose Monthly, select Day of the Month. If you select One-Time, enter the specific date. For testing purposes, consider creating a Daily frequency. Create at least one Frequency for each Attendance Type to be available at the Kiosk. For the kiosk to properly function and record occurrences, make sure that the Frequency is accurate for the Type, and that the Schedule encompasses the Check-In times established for the frequency.
- **Start/End Time** – Enter the start and end times for the actual meeting or class. For testing purposes, consider 08:00am-05:00pm start/end times.
- **Check-In Start/End Time** – Enter the start and end times attendees can check-in for this Attendance Type.

3. Click the **Update** button.

Labels

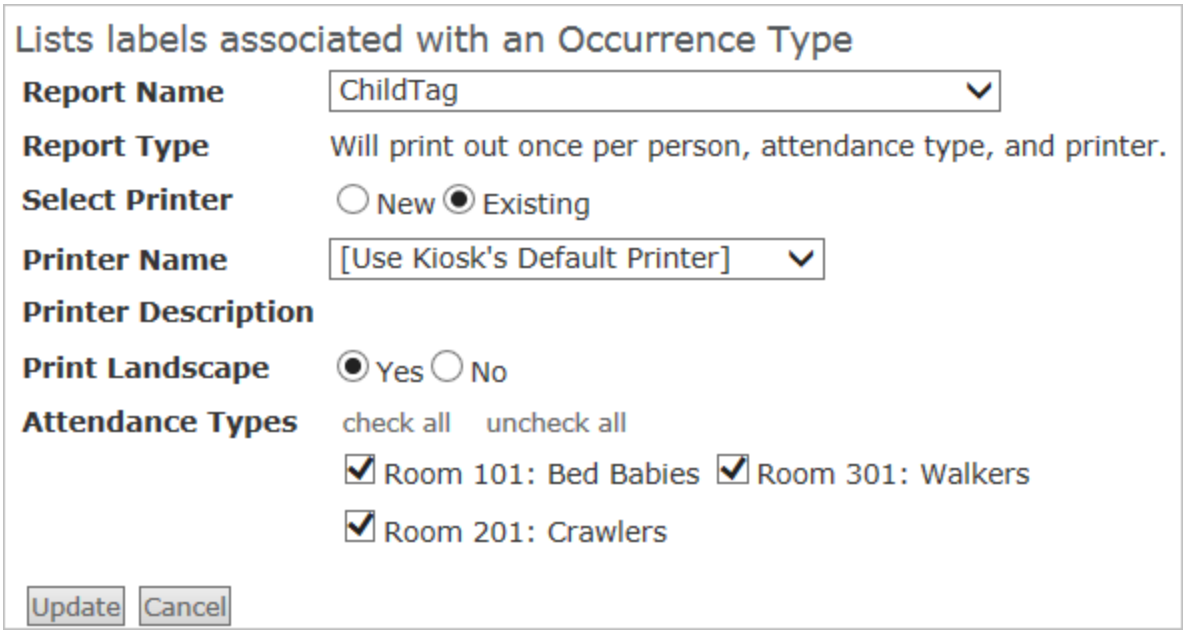
Labels are the printed receipts for Check-In for an Attendance Type or Attendance Type Category. Check-In has the ability to print one set of labels for a person who is checking into multiple Classes at once. The Classes have to be setup to print this type of label.

As you customize Check-In, review any current labels being used. While others may work with Arena Check-In, below are the label printers Shelby supports:

- Godex HD90
- Godex EZ-DT-2
- Godex EZ-DT-4
- Godex EZ-DT-4 Ethernet
- Dymo Twin Turbo 450

Select a Label

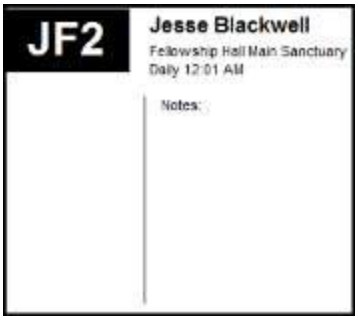
1. Click the **Add New Label** icon to select a label.



2. Select the **Report Name** to print from the Report Name drop-down for this Attendance Type.
3. Select the **Printer** to use. Default printer is set for the Kiosk so Existing is typical.
4. Select to Print Landscape or not. If No is selected portrait layout is used.
5. Click the **Update** button.
6. Repeat all steps for Attendance Types where multiple labels are needed such a child receipt and parent receipt.

Sample Default Labels

Attendant Child Receipt



Parent Child Receipt

Child Tag

Check-In Print Settings

The check-in print settings can be customized to fit the needs of your organization. For example, you may want to print labels for some classes and not for others. The devices you use such as a PC, Surface tablet, iPad, etc. and whether or not you are hosted or self-hosted can determine how best to configure your print settings.

Hosted

If you are hosted, meaning we host your data and website for you, then it is best to have printers

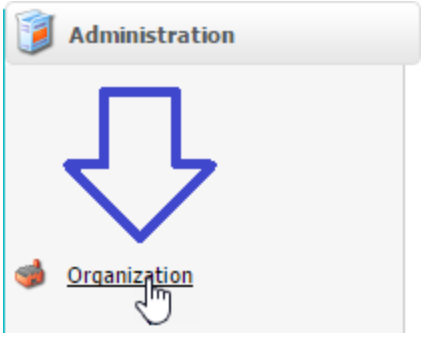
connected to your PC devices to print Check-In labels.

Self-Hosted

If you are self-hosted, meaning you have a server on site that hosts your Arena data, then you have the option to use the **CheckInPrintFromServer** feature. This feature is used for printing labels through your server to any printer that has been connected to that server. This feature must be used in order to print from non-PC type devices such as an iPad or Android tablet.

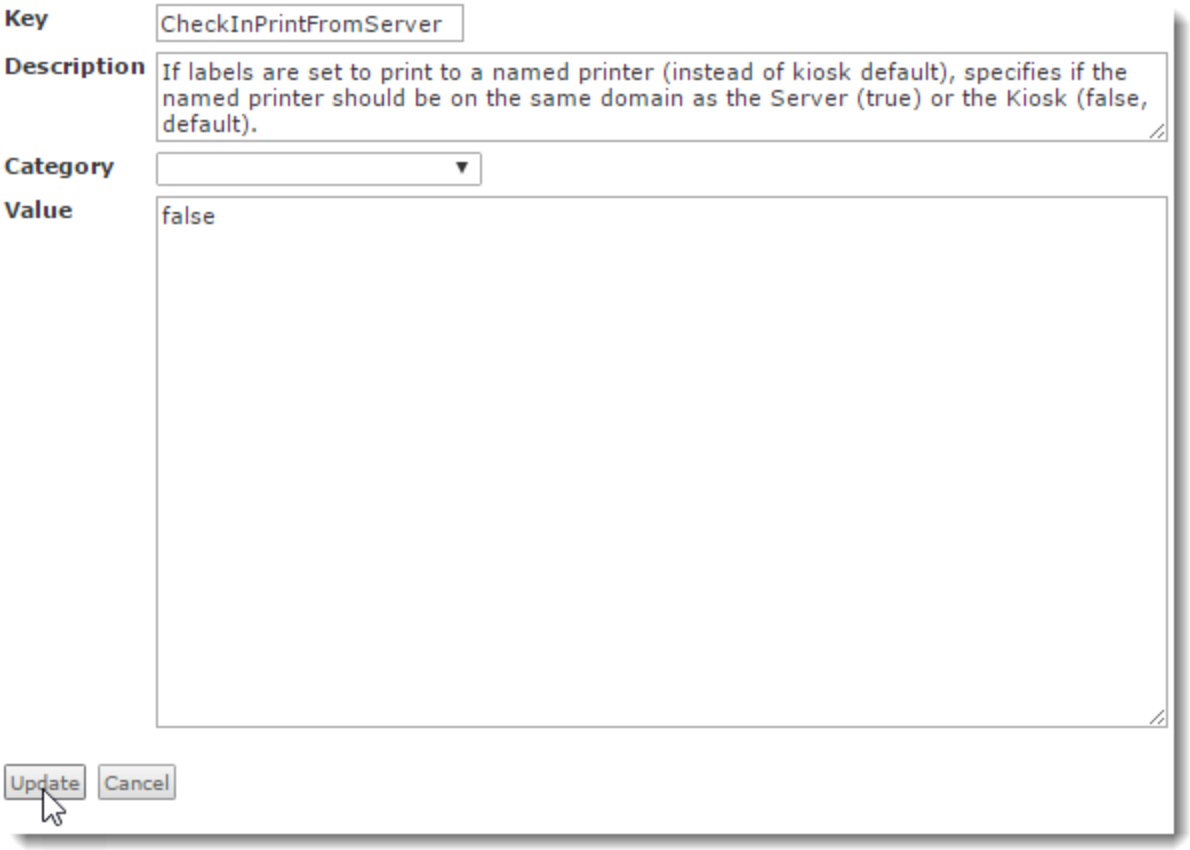
How to change the CheckInPrintFromServer feature

1. From **Administration** menu, select the **Organization** option.



2. Scroll down and then select the ***CheckInPrintFromServer*** link.

3. Enter either "false" or "true" in the **Value** field and then click the **Update** button.



Helpful Information concerning the CheckInPrintFromServer option

The CheckinPrintFromServer setting controls where print jobs originate.

When the setting is set to "false", each kiosk creates the print job for each label and prints it to an attached printer.

- When using PC devices with USB label printers as your check-in kiosks, then you will keep the default setting of "false" for the CheckinPrintFromServer organization setting.
- When CheckinPrintFromServer is set to "false" you can also use non-PC devices to check in as long as the attendance type does not need to print labels.
- Arena Hosted clients will always use the default "false" setting for CheckinPrintFromServer. This is because the check-in application is capable of off-domain printing if the Reporting Services URL listed in **Administration** > **Reporting Services Configuration** is a public URL and CheckinPrintFromServer is set to "false". (The setup of a public Reporting Services URL is unsupported by Shelby Systems but is an available option of Microsoft SQL Reporting Services when you need off-domain label printing.)

When the setting is set to "true", the web server creates the print job for each label and sends it to

a network printer.

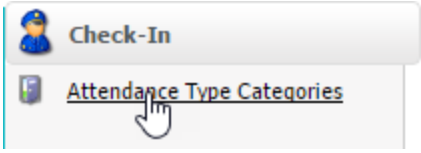
- If using network based label printers because you want or need to print from any on-domain, non-PC device's web browser (e.g. iPad, Mac, Android, etc.) then set CheckinPrintFromServer to "true". This setting applies to all kiosks.
- The check-in application can also print to network devices when CheckinPrintFromServer is "true". However, the check-in application most commonly uses a locally connected label printer.
- CheckinPrintFromServer "true" only allows on-domain printing. While check-in itself will work off-domain via a web browser, label printing is not possible off-domain using the print from server option.
- The most common reason to use CheckinPrintFromServer "true" option is the need to print check-in labels from an iPad, since direct printing to a locally connect label printer via the check-in application is not possible.
- The check-in application can only be loaded on Windows OS devices such as a PC or Windows tablet because IE and .NET are required to install and launch the application.
- When the CheckInPrintFromServer is set to "true", the printer must be shared to and installed on the Web server. The Kiosk printer needs to be set to \\<KioskName>\<PrinterNameOnWebServer>

NOTE: When using Print from Server organization setting, the printer must be installed on the web server.

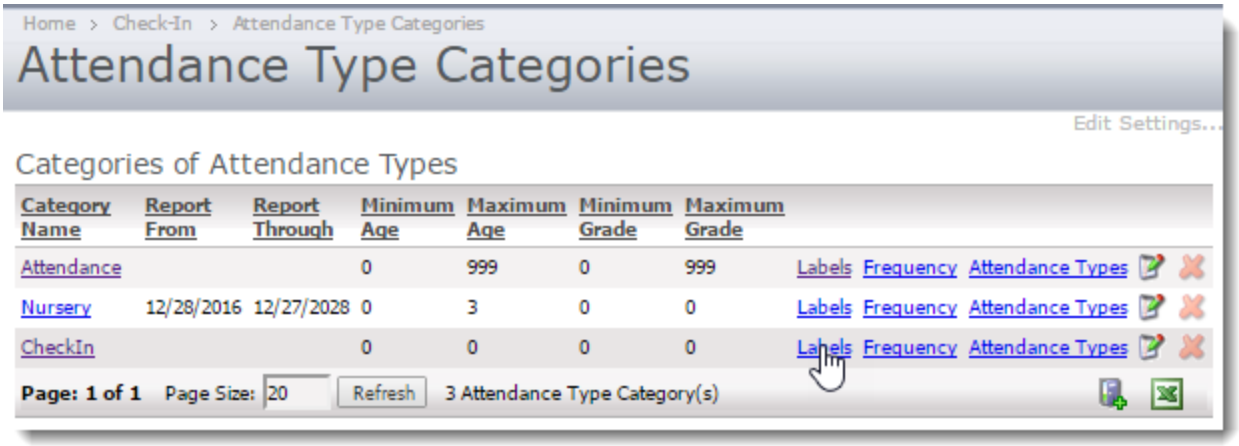
Other Settings and Configurations

Setup the Check-In label printing

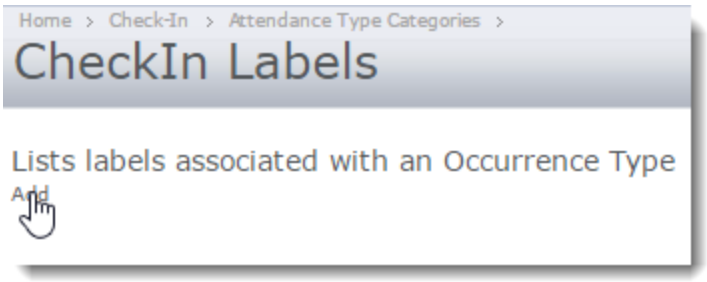
1. From the **Check-In** menu, select **Attendance Type Categories** option.



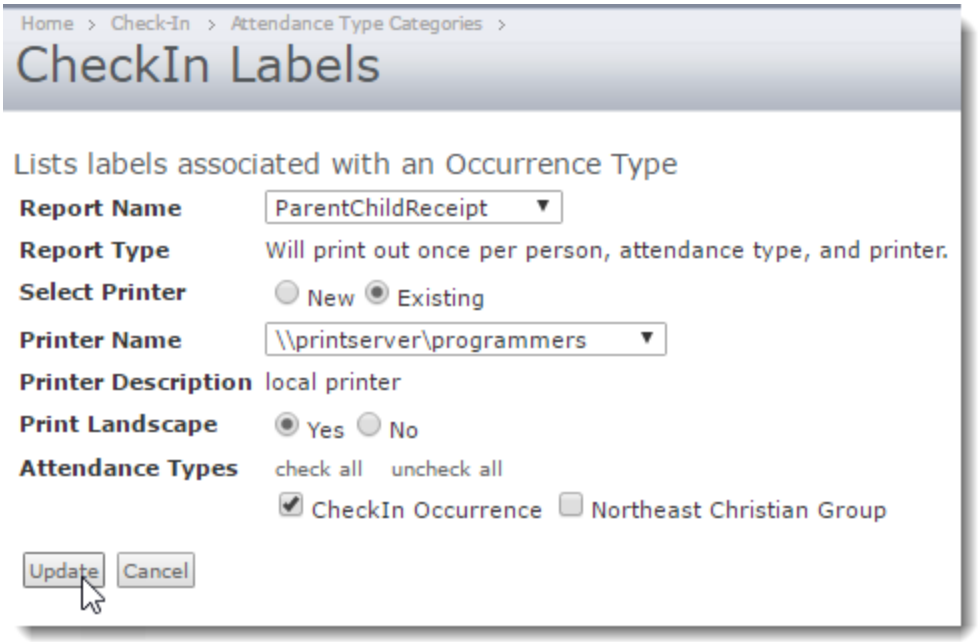
2. Next, click the ***Labels*** link for the appropriate attendance category.



3. Click the ***Add*** link.

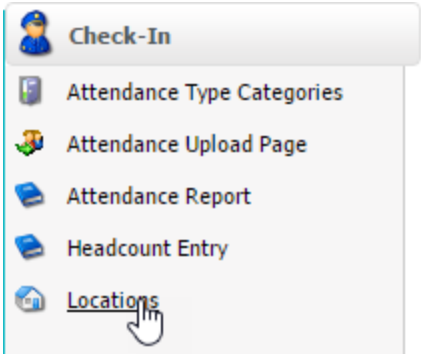


4. Specify the **Report Name**, **Printer Name**, and **Attendance Types** and then click the **Update** button when you are finished.

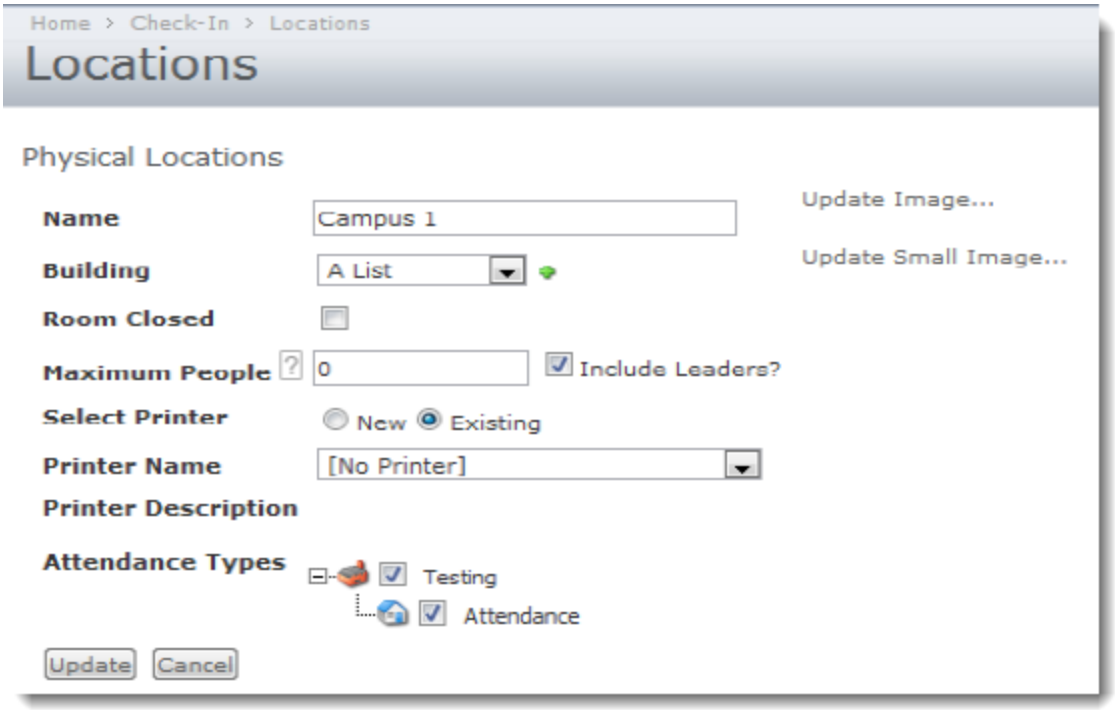


Setup Locations

1. From the **Check-In** menu, select the ***Locations*** link.

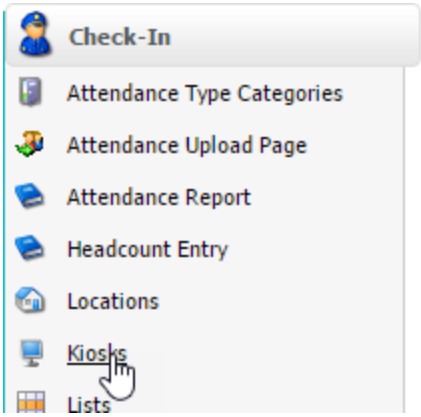


2. Choose the correct location for the occurrence under Locations. This option is only used for printing in different locations.

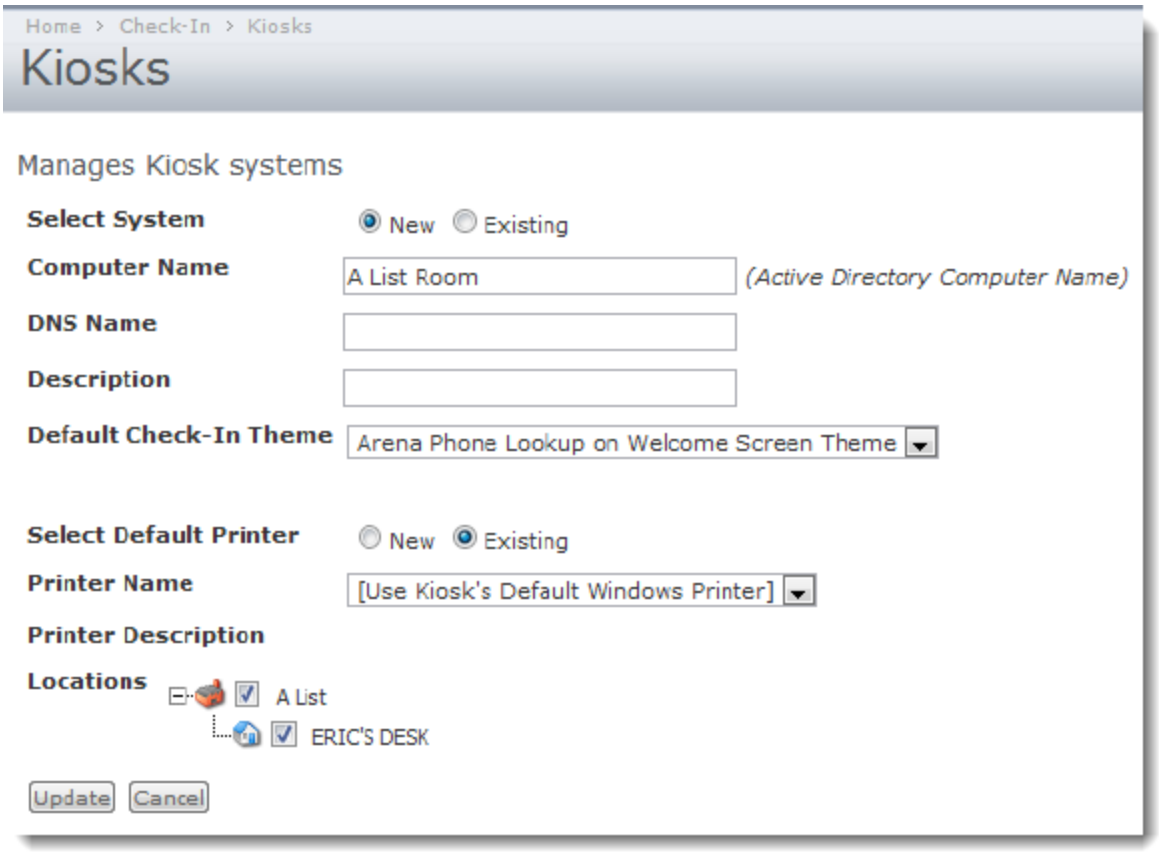


Setup Kiosks

1. From the **Check-In** menu, select the ***Kiosks*** link.



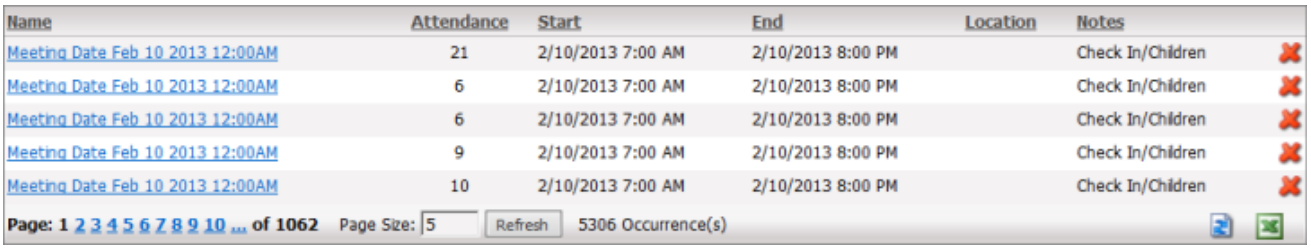
2. Click the **Add New Kiosk** icon and then enter your kiosk information. Click the **Update** button when you are finished.



NOTE: The Check-In application only works in IE. Checking in from URL is supporting by IE, Firefox, Chrome, and Safari browsers.

Occurrences

Occurrences are attendance dates for events within Arena. Click the ***Occurrences*** link to view a list of occurrences recorded for this type. The Check-In kiosk application ONLY recognizes the occurrences that are open for specific dates.



Name	Attendance	Start	End	Location	Notes
Meeting Date Feb 10 2013 12:00AM	21	2/10/2013 7:00 AM	2/10/2013 8:00 PM		Check In/Children
Meeting Date Feb 10 2013 12:00AM	6	2/10/2013 7:00 AM	2/10/2013 8:00 PM		Check In/Children
Meeting Date Feb 10 2013 12:00AM	6	2/10/2013 7:00 AM	2/10/2013 8:00 PM		Check In/Children
Meeting Date Feb 10 2013 12:00AM	9	2/10/2013 7:00 AM	2/10/2013 8:00 PM		Check In/Children
Meeting Date Feb 10 2013 12:00AM	10	2/10/2013 7:00 AM	2/10/2013 8:00 PM		Check In/Children

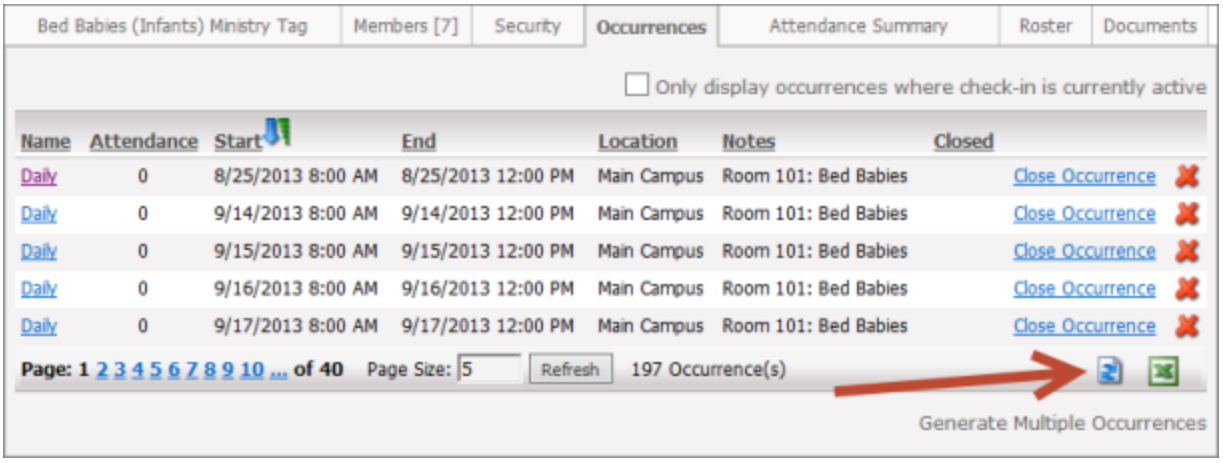
Page: 1 2 3 4 5 6 7 8 9 10 ... of 1062 Page Size: 5 Refresh 5306 Occurrence(s)

NOTE: The **Attendance** column shows the number of individuals that are marked as attended or the head count entered on the occurrence details.

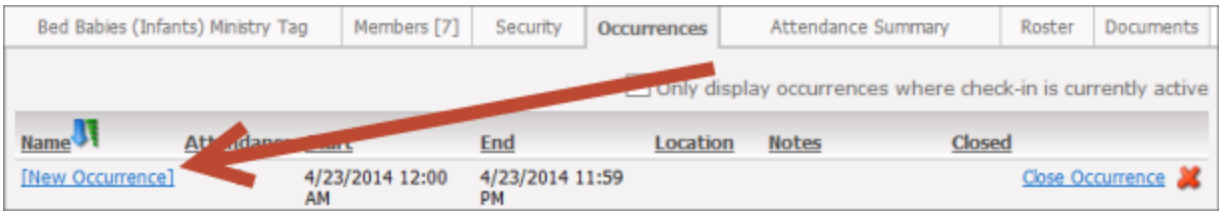
Manual Attendance

In order to take manual attendance, users need edit permission for the applicable module(s), generally found on page ID 1115.

1. From the **Attendance** tab of a Group or Tag, click the **Add New Occurrence** icon. Arena creates a default occurrence for the current date.

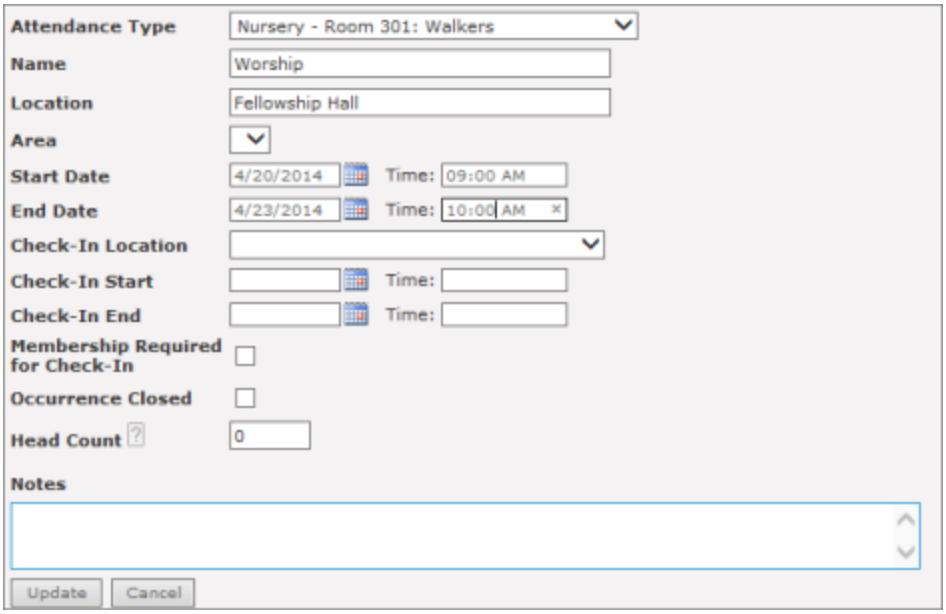


2. Click the ***[New Occurrence]*** link to customize the occurrence.



3. Click the **Edit Details** button.

4. Customize the Occurrence.



5. Verify the correct **Attendance Type** is selected for the occurrence.

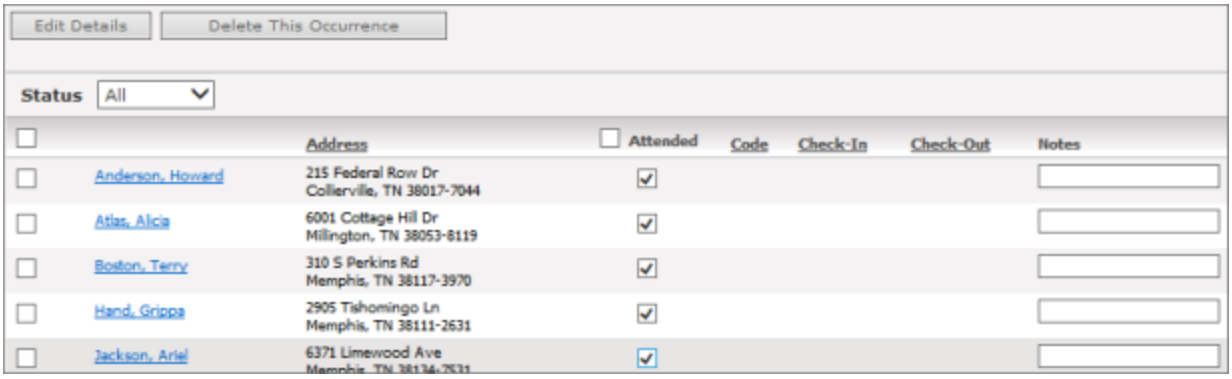
6. Enter a **Name** for the occurrence.

7. Enter the **Location** for the occurrence.

8. Enter/Select the **Start** and **End Dates** for the occurrence

9. Enter the **Start** and **End Times** for the occurrence.

10. Click the **Update** button.



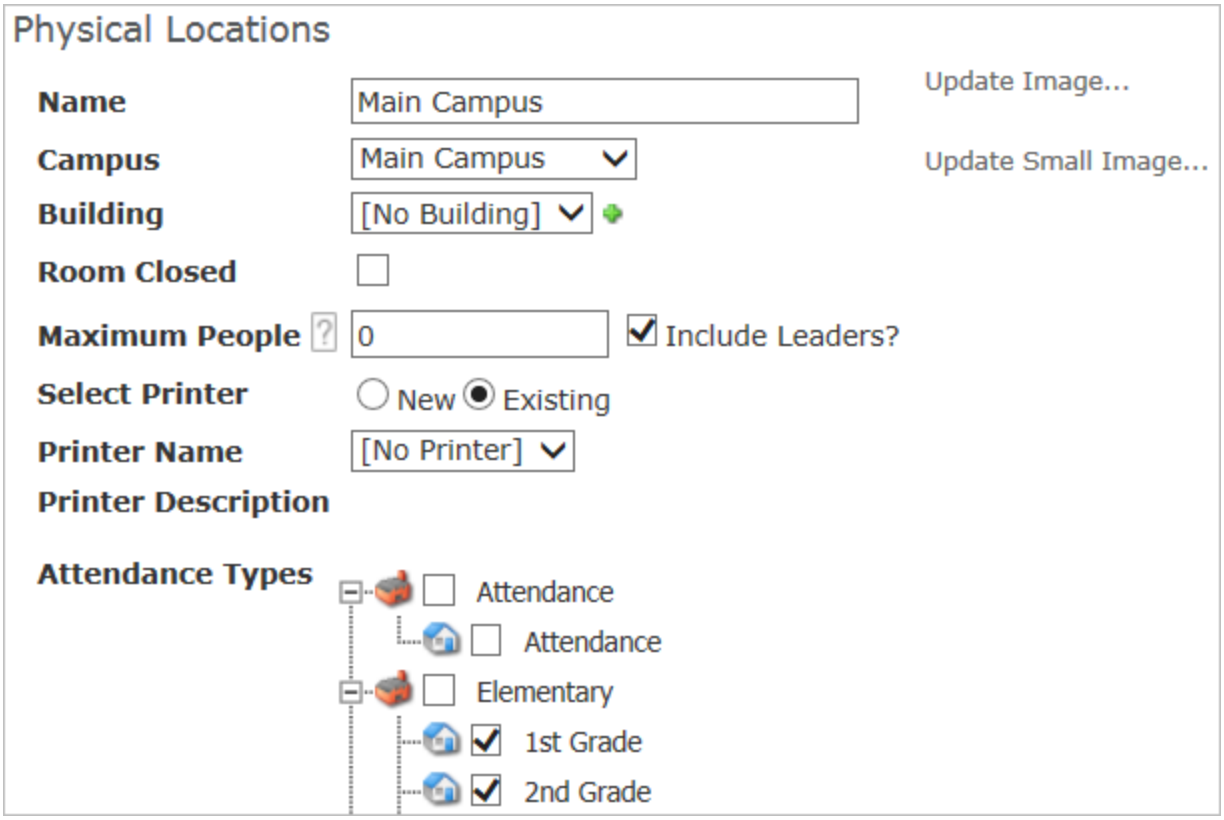
11. Mark attendance.

Locations

The **Location** page is where you create and edit a campus, building or room where people check in such as Room 100 in the Fellowship Building on the Main Campus. If the goal for your organization is to allow members to check-in at any location for the main campus, you can create one location for Main Campus. In this scenario, Arena creates one occurrence but members can check-in at any kiosk.

Create a New Location

1. From the **Check-In** menu, click the **Locations** option.
2. Click the ***Add*** link or click the **Add New Location** icon if there are existing locations.

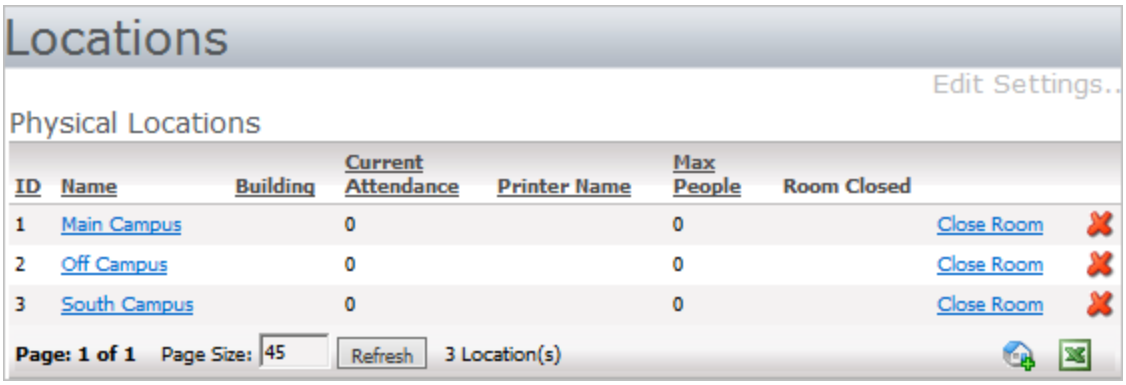


3. Enter all desired fields.
   - **Name** (Required) – Enter the name for this location such as Main Campus.
   - **Campus** (Optional) – Select a campus, if using multiple campuses. (From the Administration menu, select Organization under the <CONFIGURE> heading. Click on the ***Organization*** link listed under the **Organization Name** column. Next, click the Campuses tab to view the list of campuses. Click the **Add New Campus** icon to add a new campus.)
   - **Building Name** (Optional) – Click the **Add Building** icon to add a building, if desired. When you add a new building, it is available for other locations.

- **Room Closed** (Optional) – Select this check box to close a room. You can also close a room from the **Check-In Management** page.
- **Maximum People** (Optional) – Enter the number of people you want to allow to check into this location. If using room ratios, an occurrence with the location automatically closes when the maximum people check-in. You can set this value to "0" for no maximum.
- **Attendance Type** (Required) – Select Attendance Type(s) you want to associate with the Location. All active Attendance Type are available. You must select at least one Attendance Type.

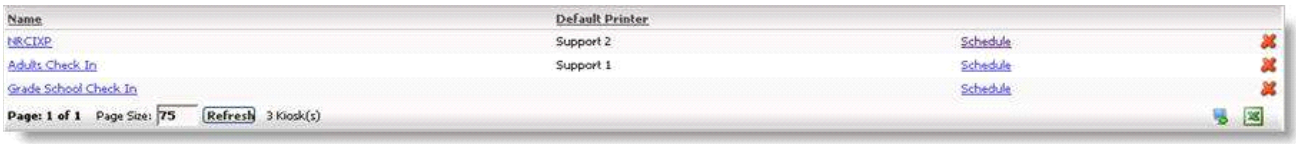
4. Click the **Update** button to save your settings.

5. From the **Location List** page, you can view all available locations, the number of current attendees, the associated printer and the maximum people for this location. To edit a location, including associated Attendance Types, click the ***Location Name*** link.



Kiosks

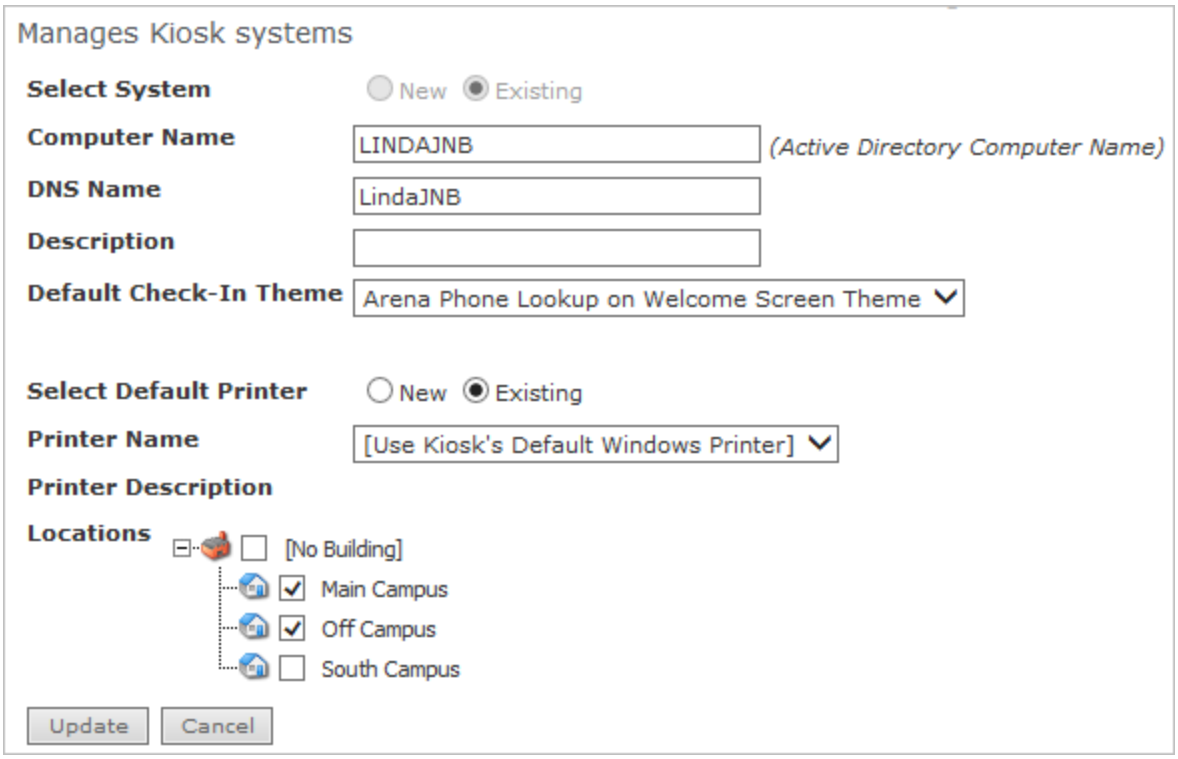
The **Kiosk** page is where you can add and maintain Kiosks used for Check-In. Each Kiosk runs on a schedule, which determines when the kiosk is available for use. To connect a Kiosk with Arena, you can simply load the Check-In application directly from Arena or manually add the Kiosk on this page.



Add a Kiosk Manually

1. Click the **Add New Kiosk** icon.

2. Complete all fields.



- **Select System** – Select if the kiosk is a New kiosk or one already Existing to the network.
- **Computer Name** – Enter the name for this, primarily for reporting.
- **DNS Name** – Enter the DNS (Domain Name Server) for the Kiosk, up to 100 characters. It is very important that you do not change the DNS Name. Changing the DNS Name causes you to lose the connection between Arena and the kiosk. Only change the DNS Name if you want to reset your kiosk and run the initial kiosk setup again. However, you can edit the other fields.
- **Default Check-In Theme** – Select a theme to use for the kiosk. A Theme is the display of the kiosk and includes the background image, the text, font and sounds. There are three default options.
- **Select Default Printer** – Select the printer to associate with this kiosk. Be sure to configure the printer for the kiosk. There are additional options available such as, using a central printer. You can select one printer per kiosk.
- **Printer Name** – Select an existing printer or specify a new printer for this kiosk. The network printer name must match what you enter here.

- **Location** – Select all Locations that you want connected to the kiosk. Notice that the list is a tree view, listing the various Locations by Building, as in the setup example used in the Locations section in the Check-In section of this help file. Check the applicable boxes for this kiosk to run. A kiosk can have more than one location assigned to it, but it must have at least one location in order to function.

3. Click the **Update** button.

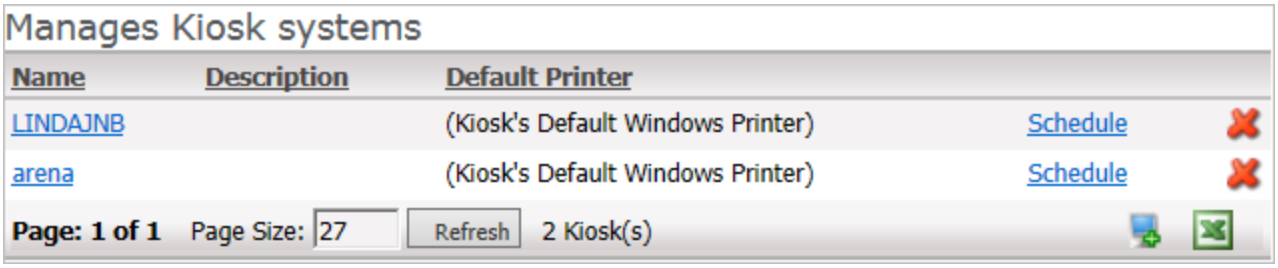
Kiosk Schedule

To the right of the kiosk name, you see a ***Schedule*** link. Schedule is where you determine the schedule name, the start and end times the kiosk is available, and either centralized or non-centralized occurrence type mode. As you evaluate the check-in setup for your organization, keep in mind you can set multiple schedules for any kiosk for times when all (Centralized) Attendance Types for the specific Location(s) are to be available or when a specific (Non-Centralized) Attendance Type and Location is to be available.

Create a Kiosk Schedule

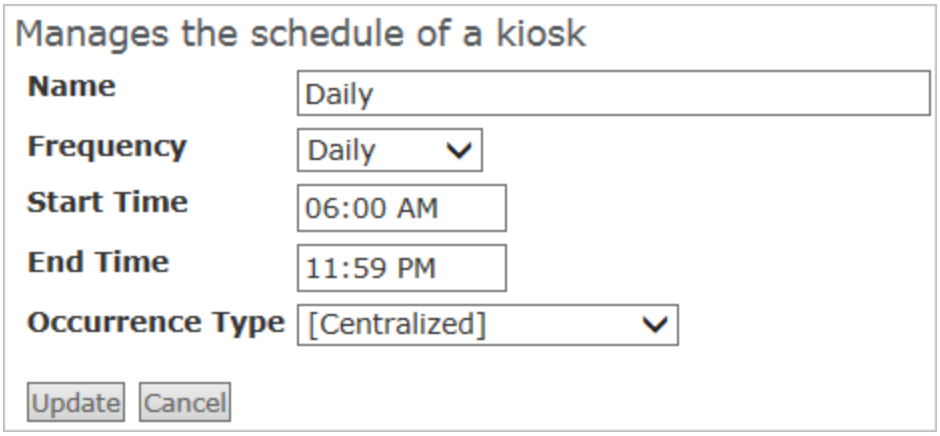
1. Click the ***Schedule*** link for the Kiosk you are creating.

2. Click the **Add New Schedule** icon.



- **Name** – This is the kiosk name.
- **Description** – This column displays the kiosk description.
- **Default Printer** – This column displays the default kiosk printer.
- **Schedule** – Click this link to display the kiosk schedule(s).
- **Delete** icon – Click this icon to delete a kiosk. If you delete a kiosk, Arena removes all associated schedules.

3. Complete the fields for this Schedule, as desired. For testing purposes, consider setting a daily schedule.

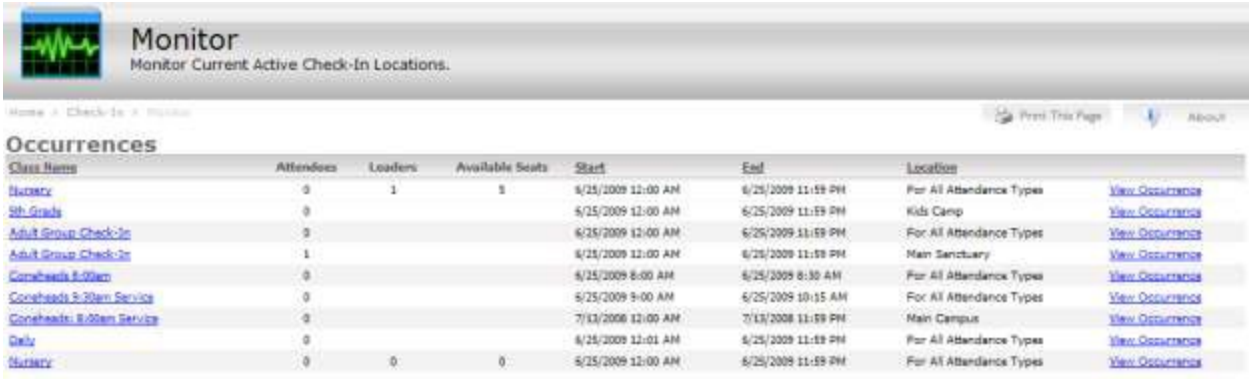


- **Name** – Enter a name for this kiosk schedule such for Sunday services, special events or for testing.
- **Frequency** – Select the frequency for this kiosk. Options are Daily, Weekly, Monthly, and One Time.
- **Start and End Time** – Enter the start and end times this kiosk is to be available.
- **Occurrence Type** – Select the occurrence type. Options are Centralized and Non Centralized. Use centralized when the goal is to allow multiple Attendance Type(s) for the specific Location(s) to be available. Use Non-Centralized when the goal is to select a specific Attendance Type.

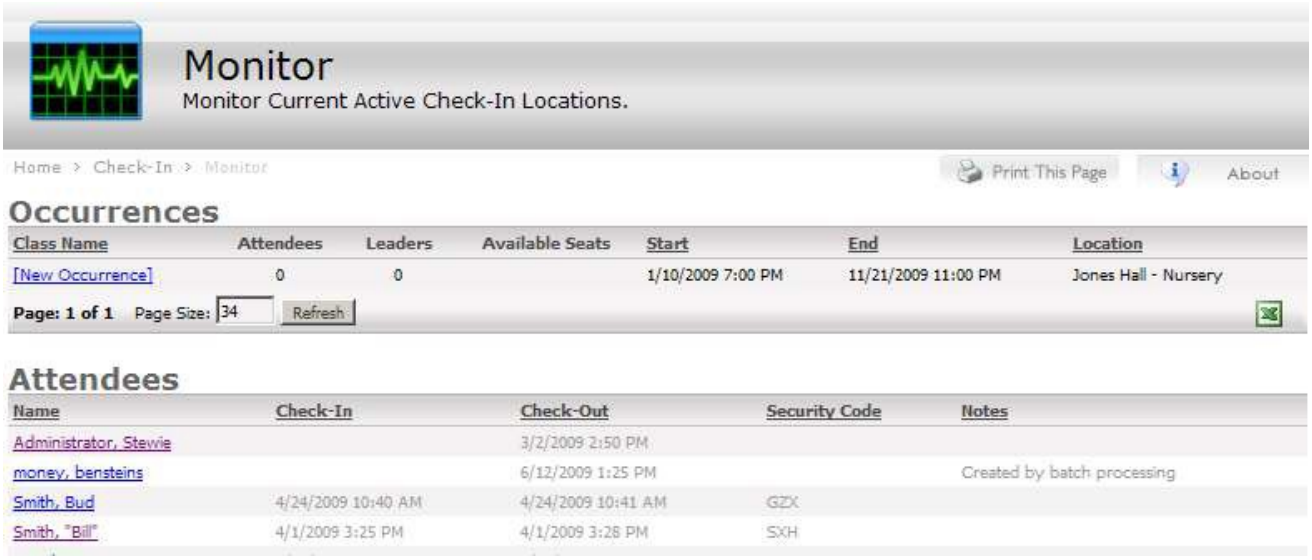
4. Click the **Update** button.

Monitor

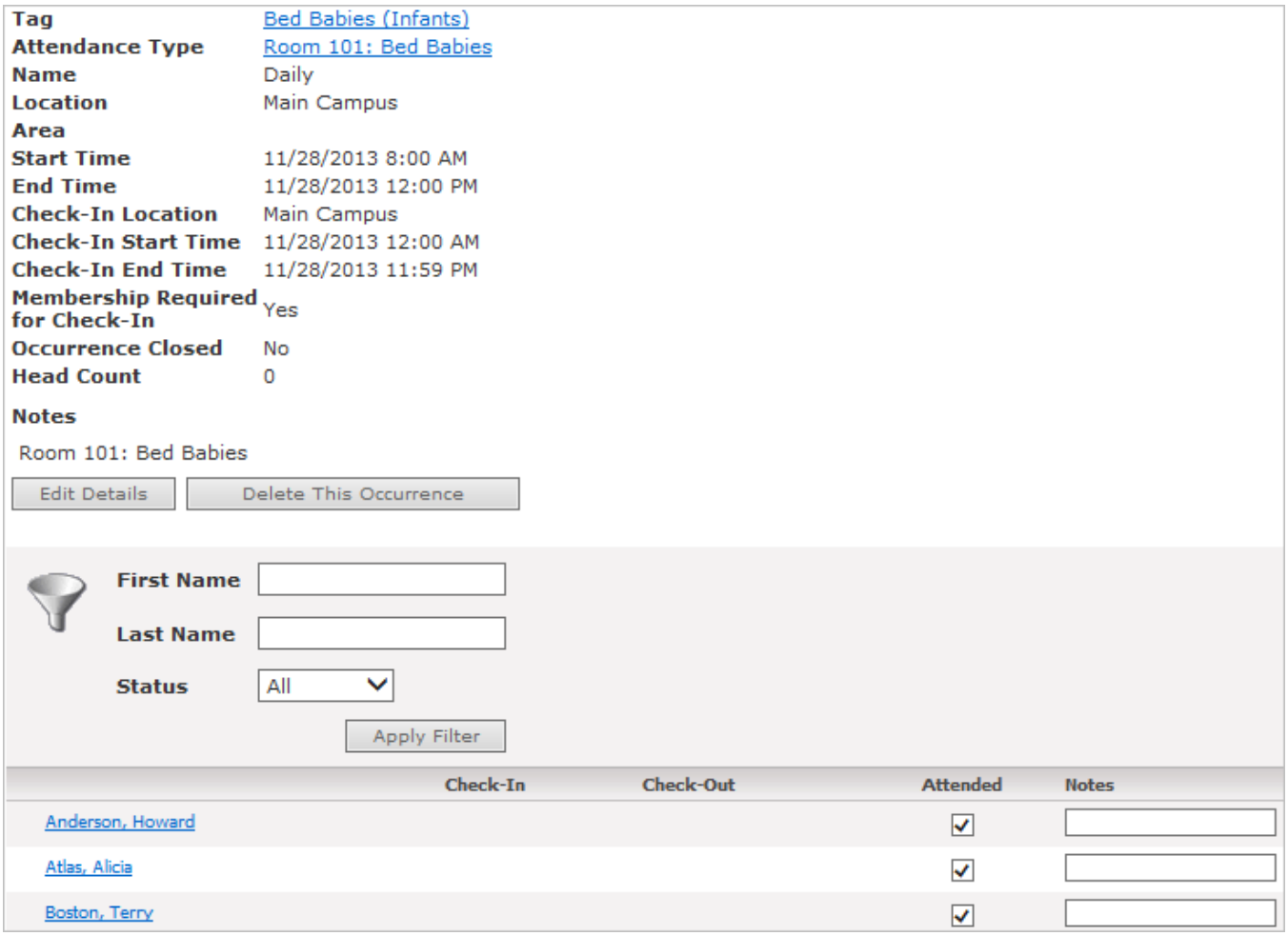
The **Monitor** page displays current active Check-In Locations. From this page you can see the number of attendees for each Occurrence (Class), the leaders checked-in (if you using Room Ratios), the available seats (if using Room Ratios), the start and end times of the Occurrence, and the Location.



Click the ***View Occurrences*** link to view the details of the Occurrence and a list of the people currently checked in.

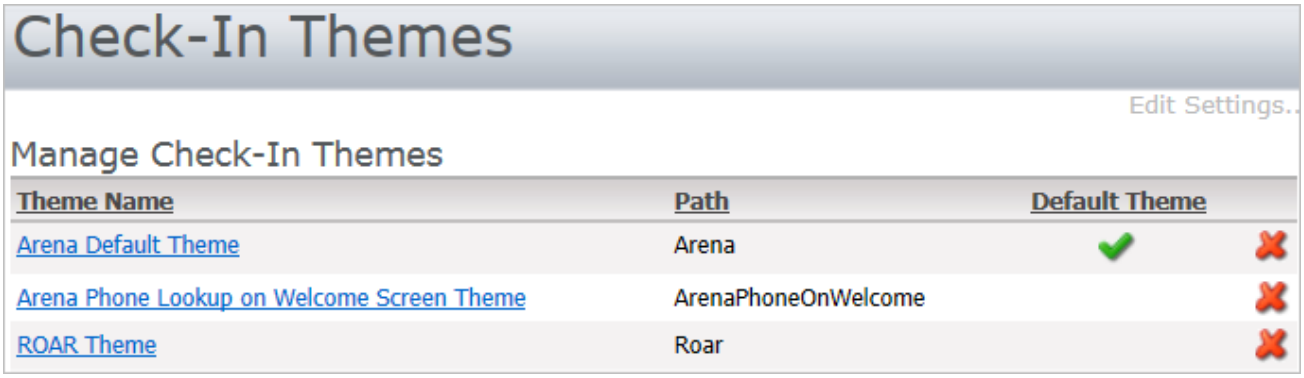


Click the ***View Occurrences*** link to view the details of that occurrence and to modify the person's attendance.



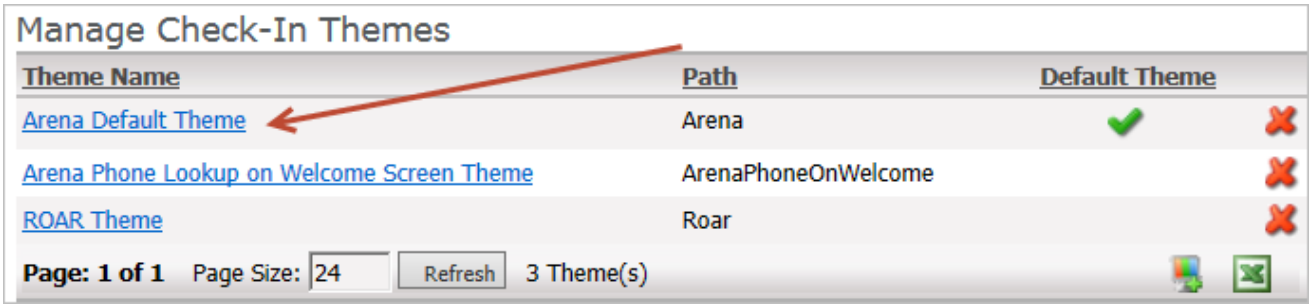
Check-In Themes

A Check-In Theme is the display of the kiosk, including the background image, the text, font and sounds. There are three default themes. You can select a theme for each kiosk. If desired and you have the applicable permissions, you can select a custom theme.



Change the Default Theme

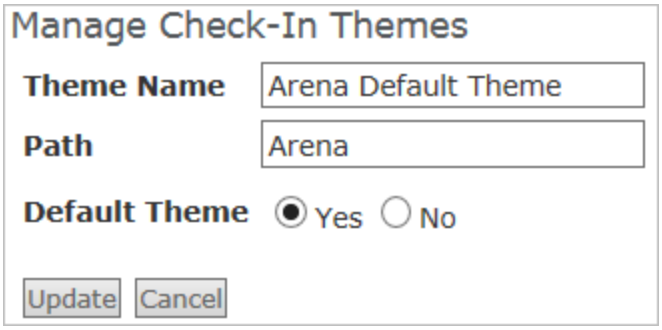
1. Click the **Add New Theme** icon on the **Check-In Themes** page.



2. Enter the **Theme Name**.

3. Enter the **Path**. See your Arena Administrator for the file location of the custom theme.

4. Select whether to use this theme by default for all Attendance Types.



5. Click the **Update** button.

Check-In Implementation

This section covers the setup and operation of Arena's Check-In. You can use Arena Check-In with a touch screen and a traditional kiosk with a keyboard and mouse.

Initial Startup and Configuration

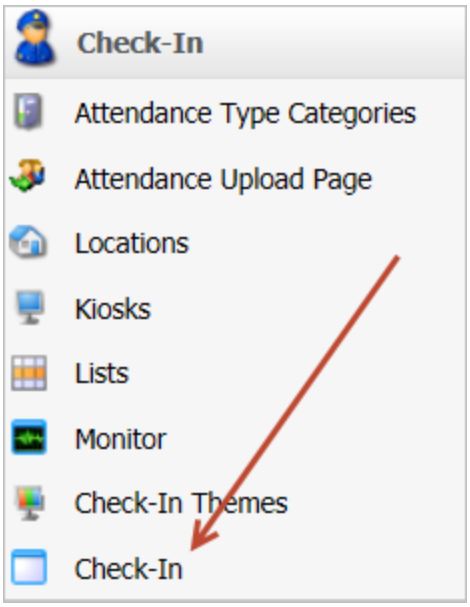
The first time you run this application on the kiosk, set up the Location, Attendance Type Category, and Mode. This is a one-time setup unless you change kiosk DNS in the kiosk settings

under Check-In.

Launch and Configure Check-In

You can also access via the Check-In URL.

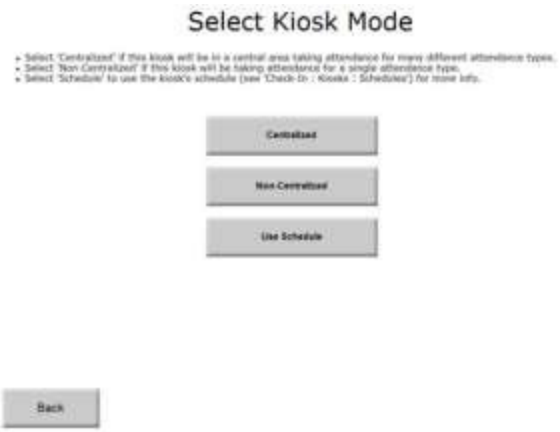
1. From the **Check-In** menu, click the **Check-In** option.



2. Click **Select All** or **Specific Locations**. These are the Locations as setup in Check-In within Arena. You can change these settings later under Check-In/Kiosks by opening the corresponding kiosk in Arena.

3. Click the **Finished** button.

4. Select the **Check-In Mode**.



- **Centralized** – Use this option to enable every Attendance Type tied to the Locations to check in. Use this option if you are using one kiosk for multiple classes.
- **Non-Centralized** – Use this option to select particular Attendance Type to use with this kiosk. Use this option if you are using a kiosk for each class. Arena prompts you to select the Attendance Type this kiosk uses.
- **Use Schedule** – Use this option to narrow check-in even further.

5. From this screen, attendees can scan a Check-In card for themselves or their family, or they can use the **Manual Check-In** option to use the Phone Lookup.

Check In Application

Once you run the Check-In application members can check into the available Attendance Types. Be sure to review Check-In Application Settings such as if you want to **Allow Family Members to be Pre-selected** or **Must Manually Choose Family Members** (this determines whether to scan a Member's entire family or not.), and if **Classes Are Preselected**. If you are using Arena Check-In and would like to allow non-family members to Check-In one another, your Administrator can create a Relationship containing the phrase "can checkin" (case insensitive, no quotes) that permits this action. To close the Check-In application press “ATL” + “F4” key.

The first time a user runs an application, the user has the option to install a desktop shortcut. Thereafter, the user can launch the application from the desktop shortcut or from Arena.

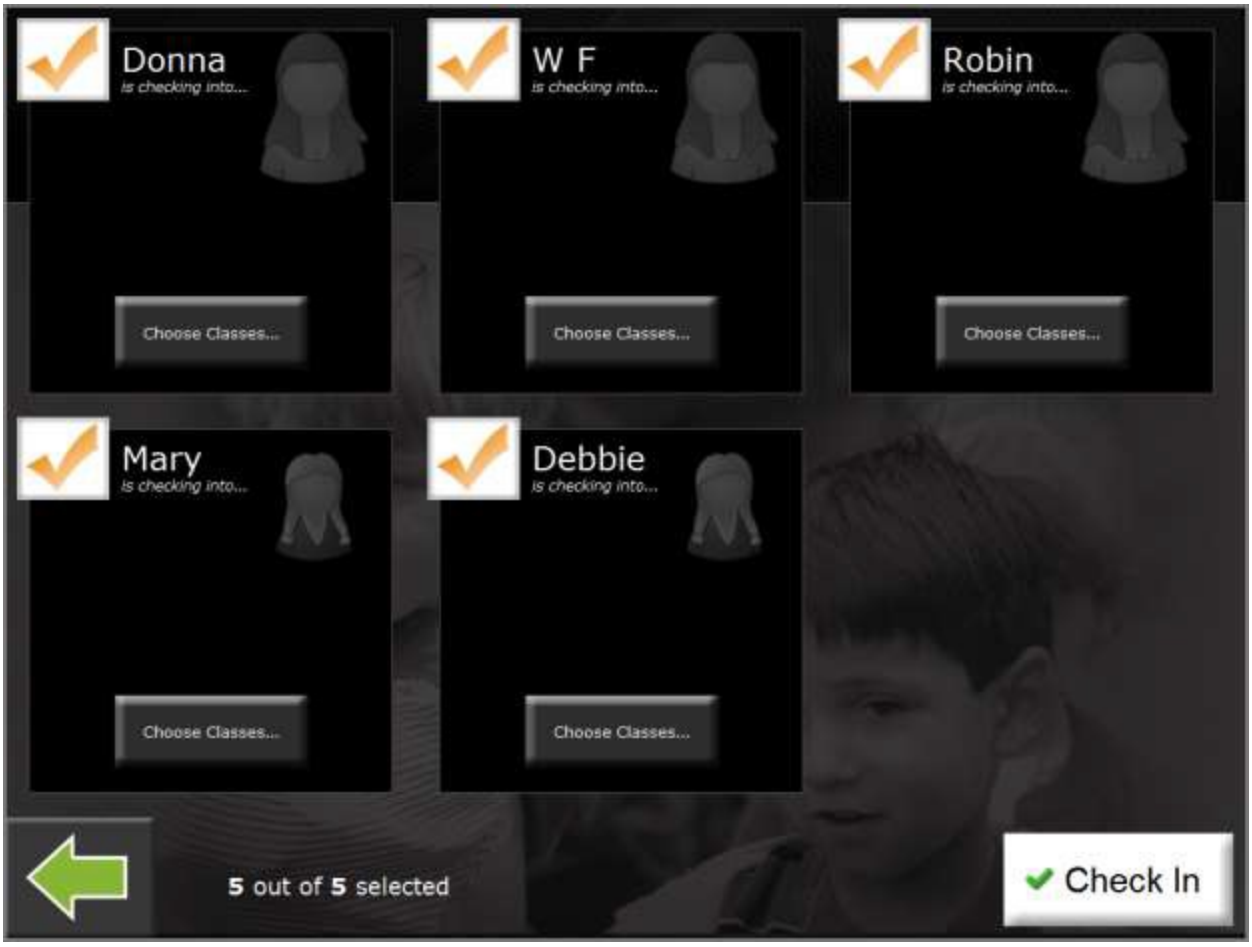
Centralized Mode

When a member scans a member card or checks in, Arena displays a list of records associated with the specific member card or phone number whom are eligible to Check-In. Arena displays family members and those records with a “can checkin” Relationship Type.

Arena displays the “best fit” class(es) for this person, based on what classes are currently open, what classes allow check in at this time, the person’s age, and gender. You can establish these parameters in the Attendance Types Categories and Attendance Types.

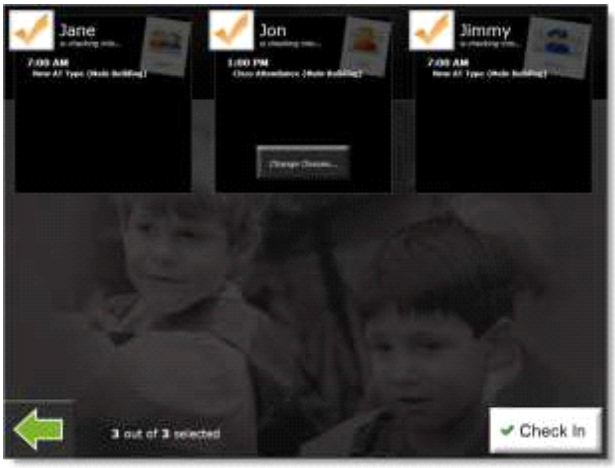
Check-In Family Page

Once John selects his class, he then presses the white “Check In” box to check into the class. A receipt prints for him, if setup to do so. Members only need to click Check-In one time. Clicking more than once could results in errors.



John confirms the class is correct and then returns to the family list, where he presses Jimmy's name to Check In.

Check-In Confirmation



Notice Arena automatically places John and Jimmy into different classes. When John pressed his own name, the class selection page came up with his two class choices Couples and All Attendees. For Jimmy, who is 5 years old, the Kindergarten class comes up, as it is set to allow ages 5-6.

If John accidentally presses the wrong person, he can press the **Arrow** to go back. Since he wants to check in Jimmy, John now presses Check In to check Jimmy into the Kindergarten class. A receipt prints out, and Check-In displays the family list.

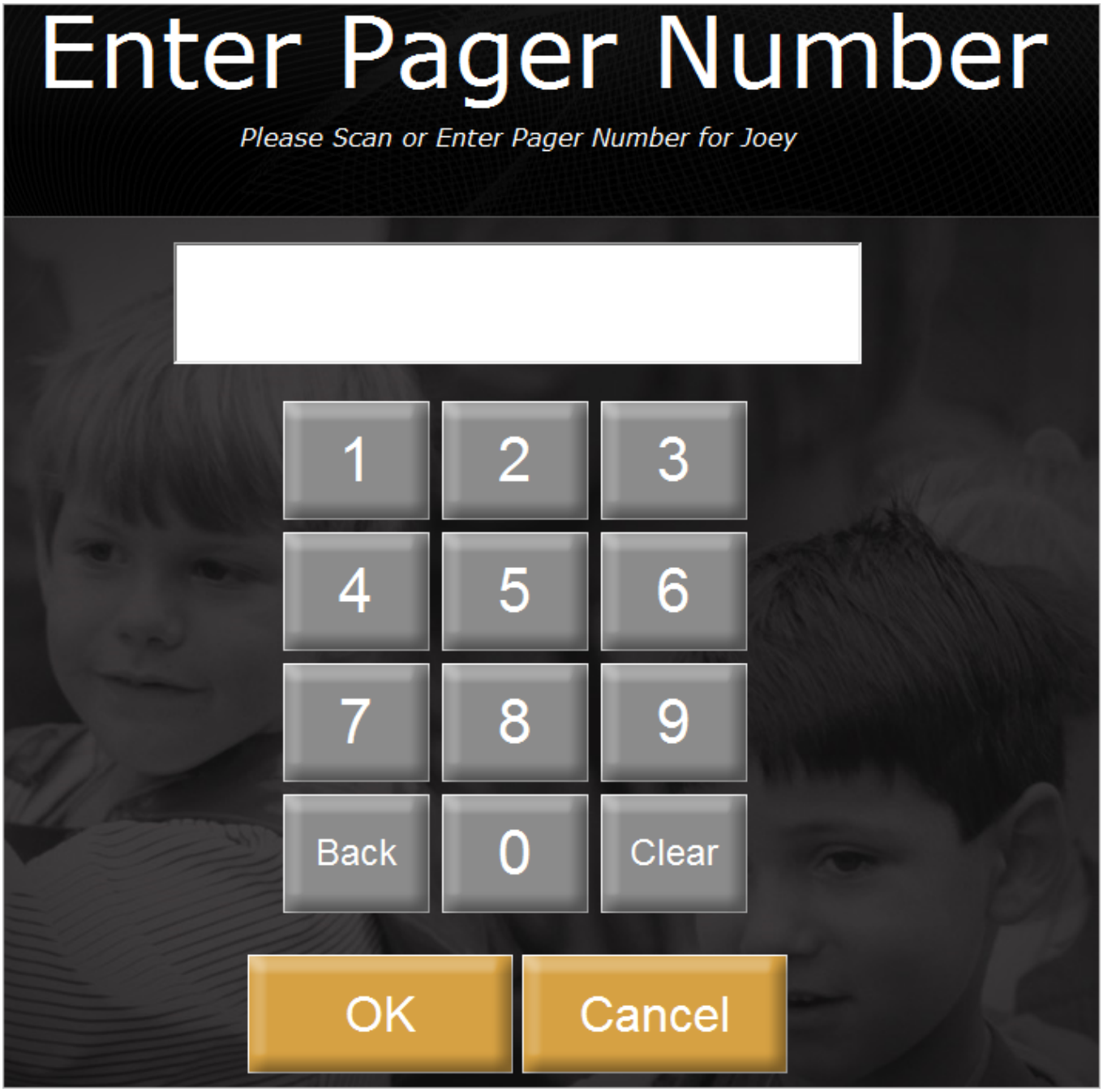
If John wanted to check into a different class, and another class was available that this kiosk was setup to use, John would get the following page:

Notice that now the **Change** button is active. When John presses Change, he sees the following:

In this scenario, John can check into All Attendees, instead of Couples. John would see a new Confirmation page, and can now complete the check in process. Notice that John and Jimmy are grayed out and "(checked in)" displays next to their names. If John is done checking people in, he presses Finished or he can check in someone else.

Pager Number

If pager number was selected for the Attendance Type, enter a numerical pager number at the time of check-in. If not using pagers, consider entering the family ID, last digits of the phone number or other unique numerical values.

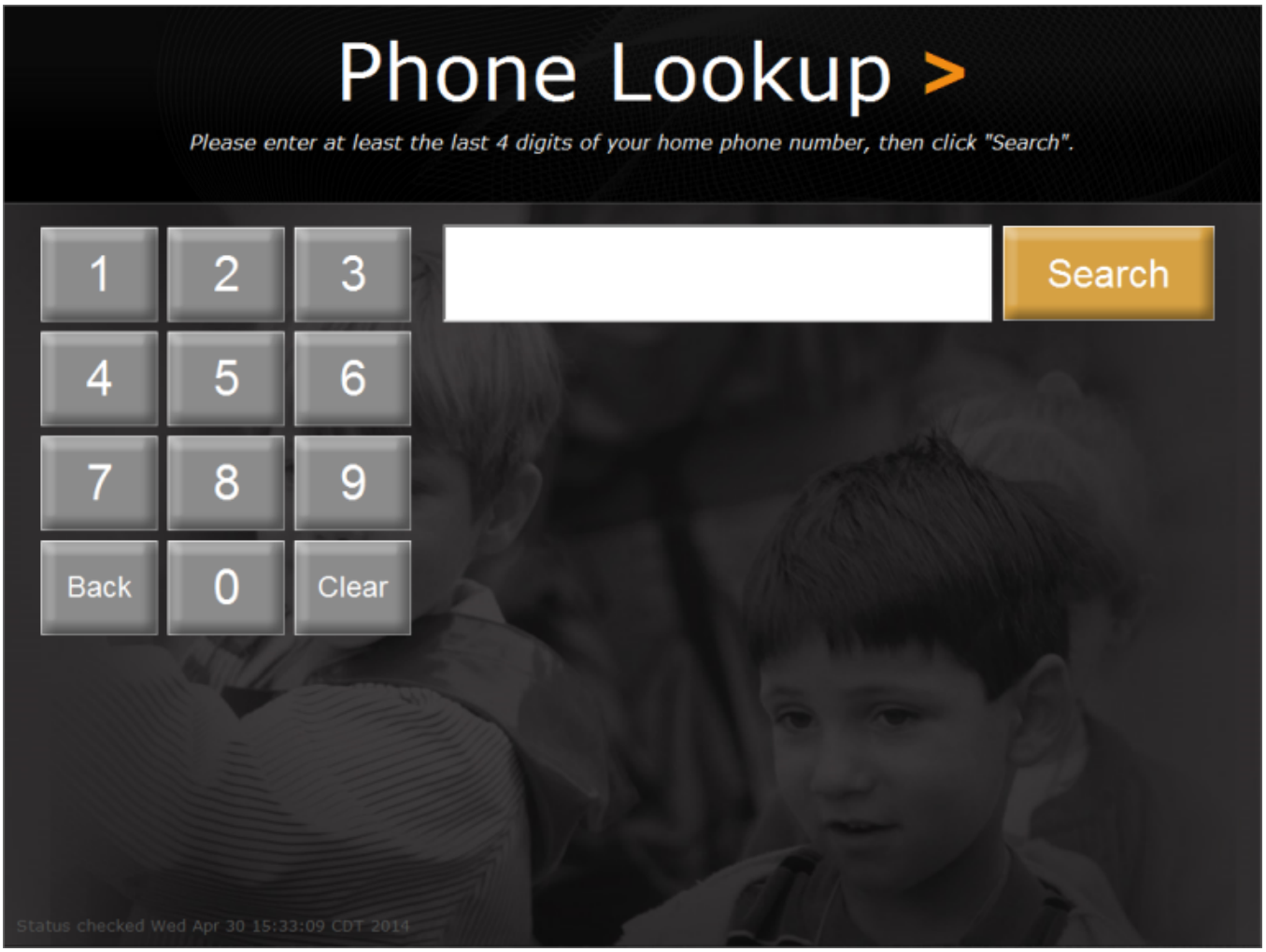


Non-Centralized Mode

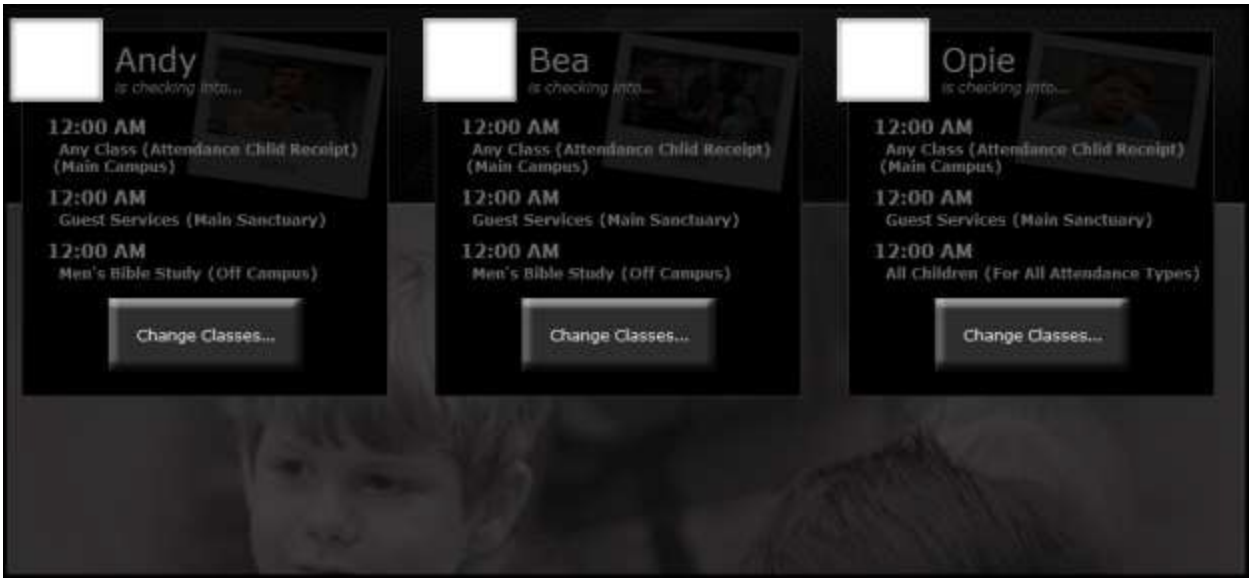
Using Non-Centralized mode only allows you to check into one Attendance Type at this kiosk. The Main page looks similar, but the bottom left corner shows the Attendance Type, the Location, and the current number of people checked into the Class.

In this example, the kiosk is setup for Kindergarten, which is in the Bartlett Check-In Location. In the Doe family, only Jimmy is eligible for the Kindergarten Attendance Type. When John scans his barcode or looks up his family using the Manual Lookup, Jimmy automatically checks in.

Members can enter any phone number applied to the individual record. It is generally recommended to use at least Main/Home and Cell. Main/Home displays all records in the family whereas the cell phone number displays the individual to which the phone number exists on the record.

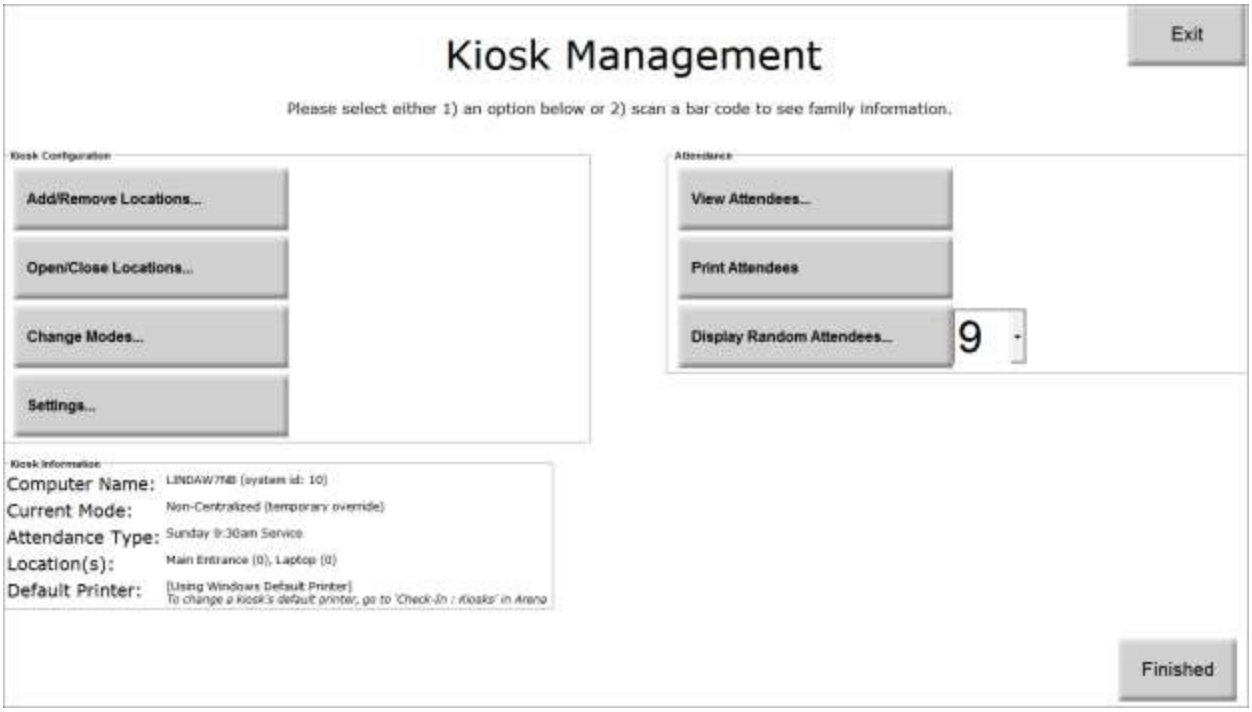


If John has multiple family members who are eligible for a Type, a page displays from which he can choose all or only those family members to check in, as shown on the following page. John would click Finished when he has chosen the correct family member(s). This checks them in and prints out the receipt(s).



Check-In Management Page

Users with permission can access the Check-In (Kiosk Management) management page. To access the Check-In management page enter the Check-In Management URL from a browser or press “Ctrl” + “M” on the keyboard and enter the required login and password. This requires domain access.



- **Add/Remove Locations** – Use this button to change locations and associated attendance types for this kiosk.
- **Open/Close Locations** – Use this button to manually close or open a location using this kiosk.
- **Change Modes** – Use this button to change the mode of this kiosk to Centralized or Non-Centralized. You can use Kiosk Schedule to reset back to the Schedule Settings, removing any temporary changes made to the Kiosk.
- **View Attendees** – Use this button to view and verify attendees, reprint labels, and to check out attendees.
- **Print Attendees** – Use this button to print a list of all people checked in. This feature is available for non-centralized kiosks.
- **Display Random Attendees** – Use this button to display a random list of people checked in. Select the number to the right to select how many people to display. This feature is available for non-centralized kiosks.
- **Exit** – Click this button to close the **Check-In** application.
- **Finished** – Click this button to return the Check-In home screen.

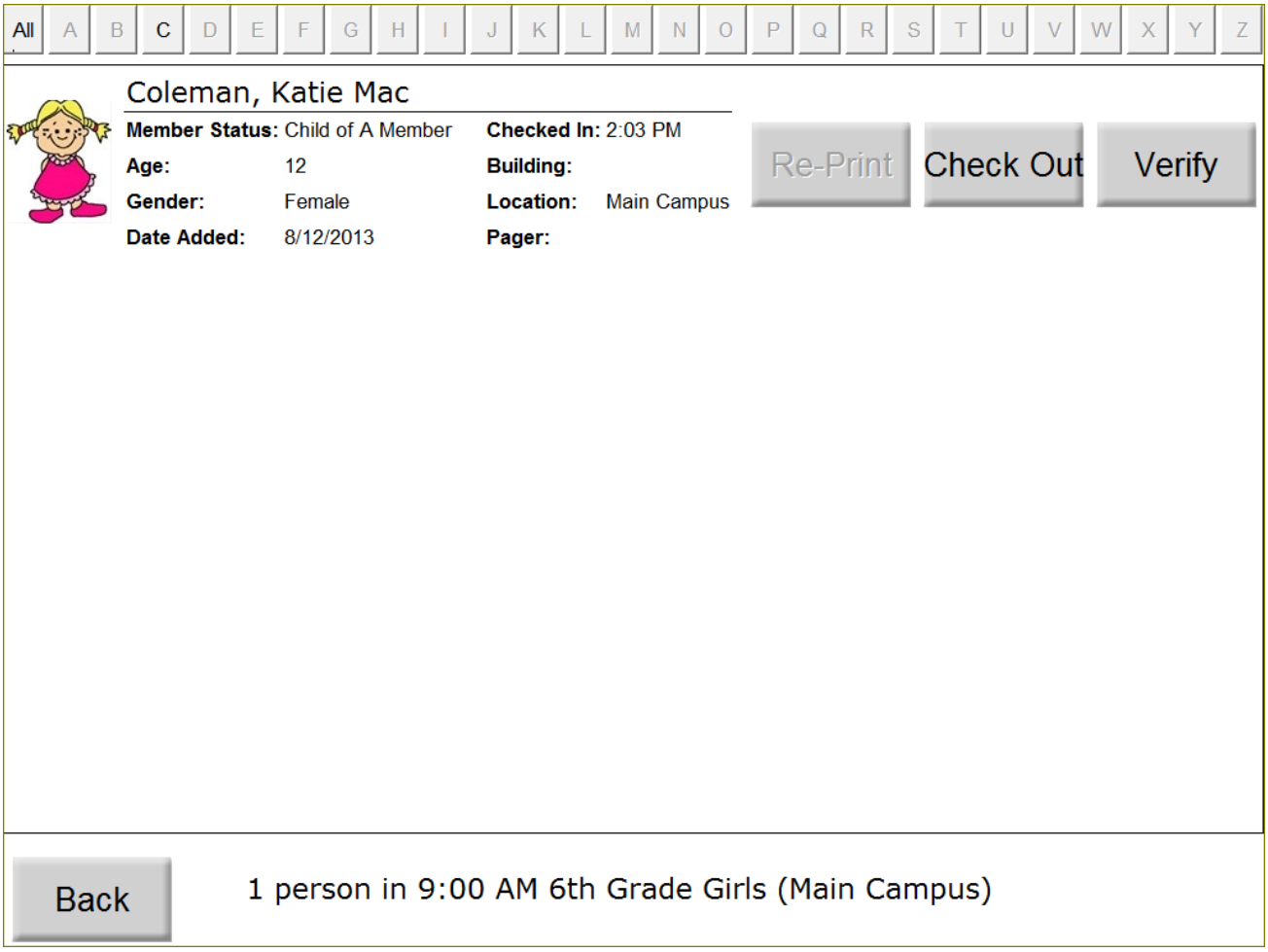
Checking Out

Arena offers three options for check out.

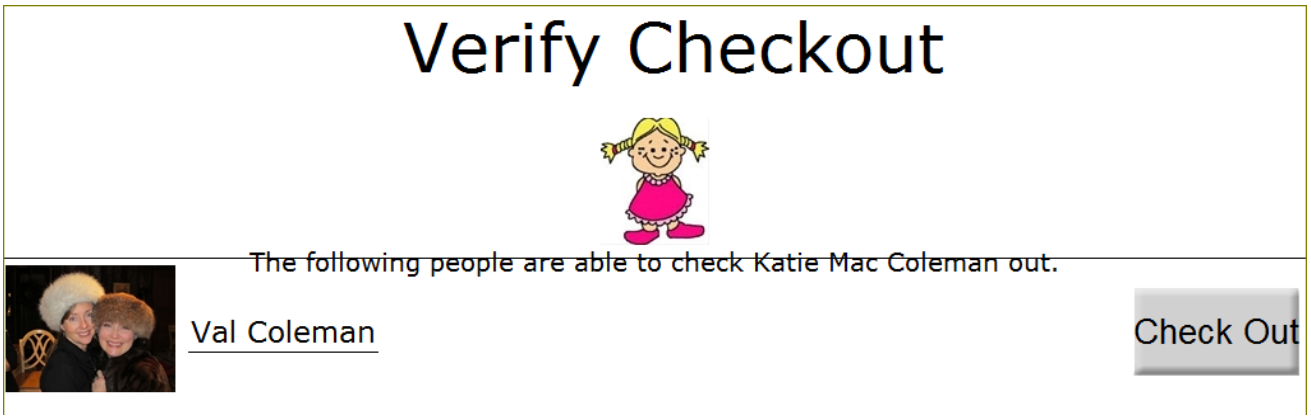
If using check-in labels with a bar code, scan the barcode. Arena automatically checks the person out and time stamps it. You should see the barcode in the dataset of the label if it is not on your current setup.

If using vein scanning, scan the finger at time of check out. Arena automatically checks the person out and time stamps it.

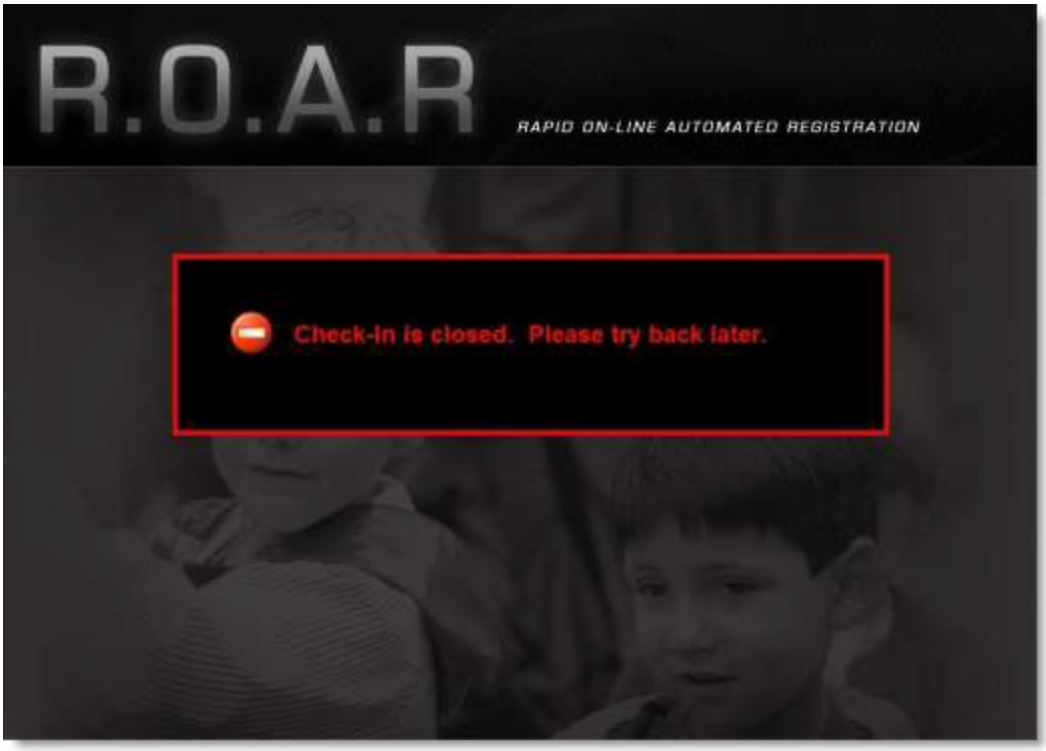
Users with permission to access the **Check-In Management** page, as shown below, can check out members.



Prior to check out, users can also select Verify to display the records whom can check out the individual/child. By default, immediate family displays, and those records indicated with the Can CheckOut Relationship Type.

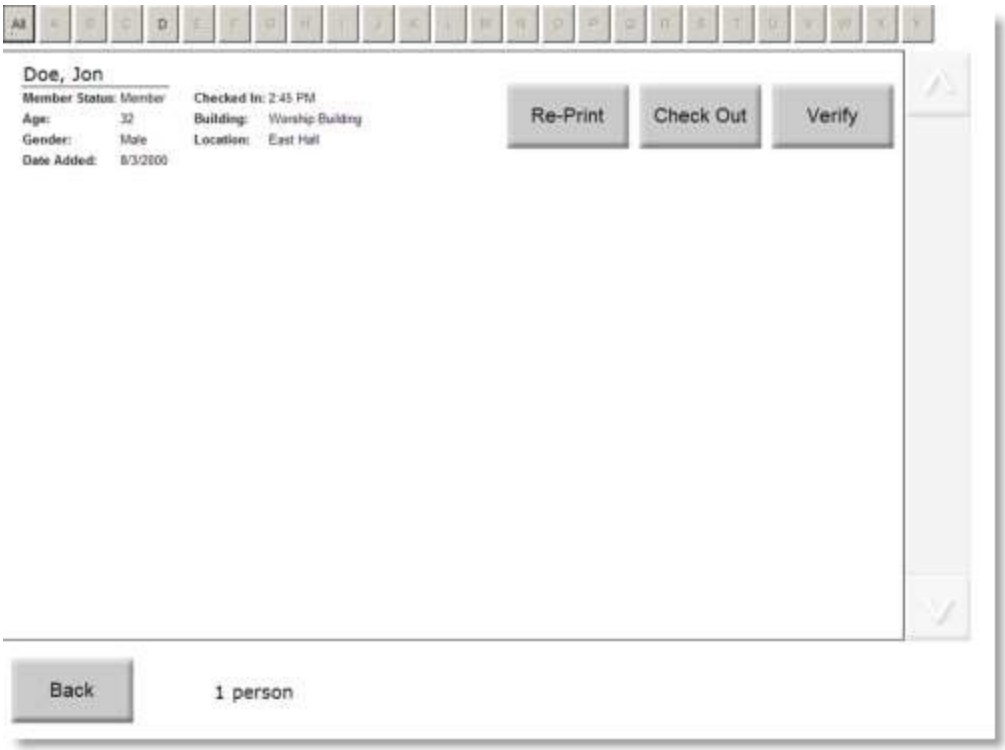


If this kiosk has no open Location, the below screen displays.



Scanning a Barcode within the Management Page

If you scan a barcode of someone while in the Management Page, it displays a list of the family members so that you can check any/all out. Click the **Verify** button for a list of people who are authorized to check out the child, or print a receipt for each person. Click the **Back** button to exit this page.

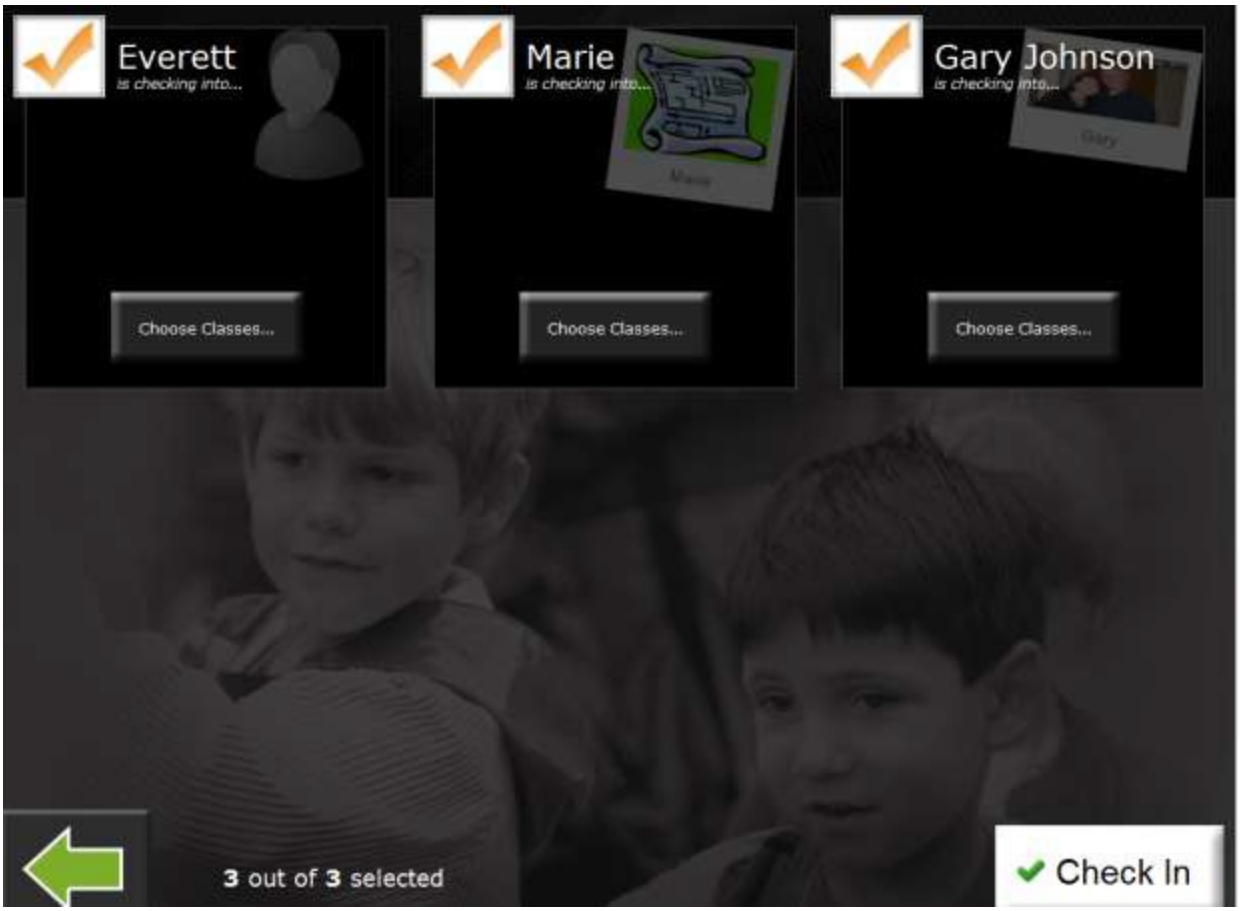


Click the **Back** button to exit the management screen and return to the kiosk Main Page.

Press **Exit** to close the application entirely. (Alternatively, pressing the "Alt" and the "F4" key at any time in the application closes the application entirely. For this reason, we do not recommend having an accessible keyboard attached to a non-attended kiosk.)

Using Relationship with Check-In

On the Check-In screen, individuals can check other people who are either a family member, share the same phone number and/or have of have the "can checkin" Relationship Type. Arena identifies those individuals by displaying the full name on the check-in screen.



Setting up an iPad for Check-In

See your Arena Administrator for some of these setup steps.

Setup a workstation to use a wireless network.

Install/launch Check-In.

Get IP address from Arena database (dbo.comp_kiosk_ip).

Set the iPad to use this IP address.

In SQL, change computer name of system id tied to the recorded IP address to match that of the iPad device (dbo.comp_system).

Contributions

Arena's Contributions feature allows you to manage your organization's Online Giving. You can setup your organization to receive gift payments via Credit Card and ACH (Automated Clearing House). If using Shelby Financials, you can export batches to Shelby v.5 Contributions or directly to Shelby v.5 General Ledger.

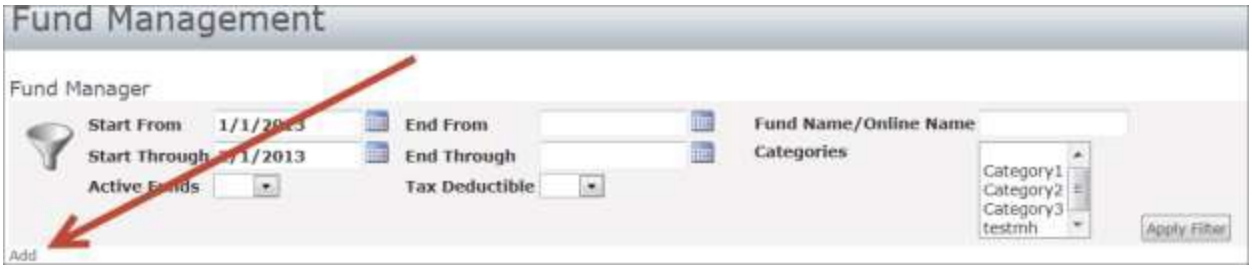
Fund Management

Use the **Fund Management** page to manage different internal and external giving options (comparable to Shelby v.5 Purposes). In order to accept Online Giving you need an active payment gateway processor and at least one Arena fund with online giving enabled.

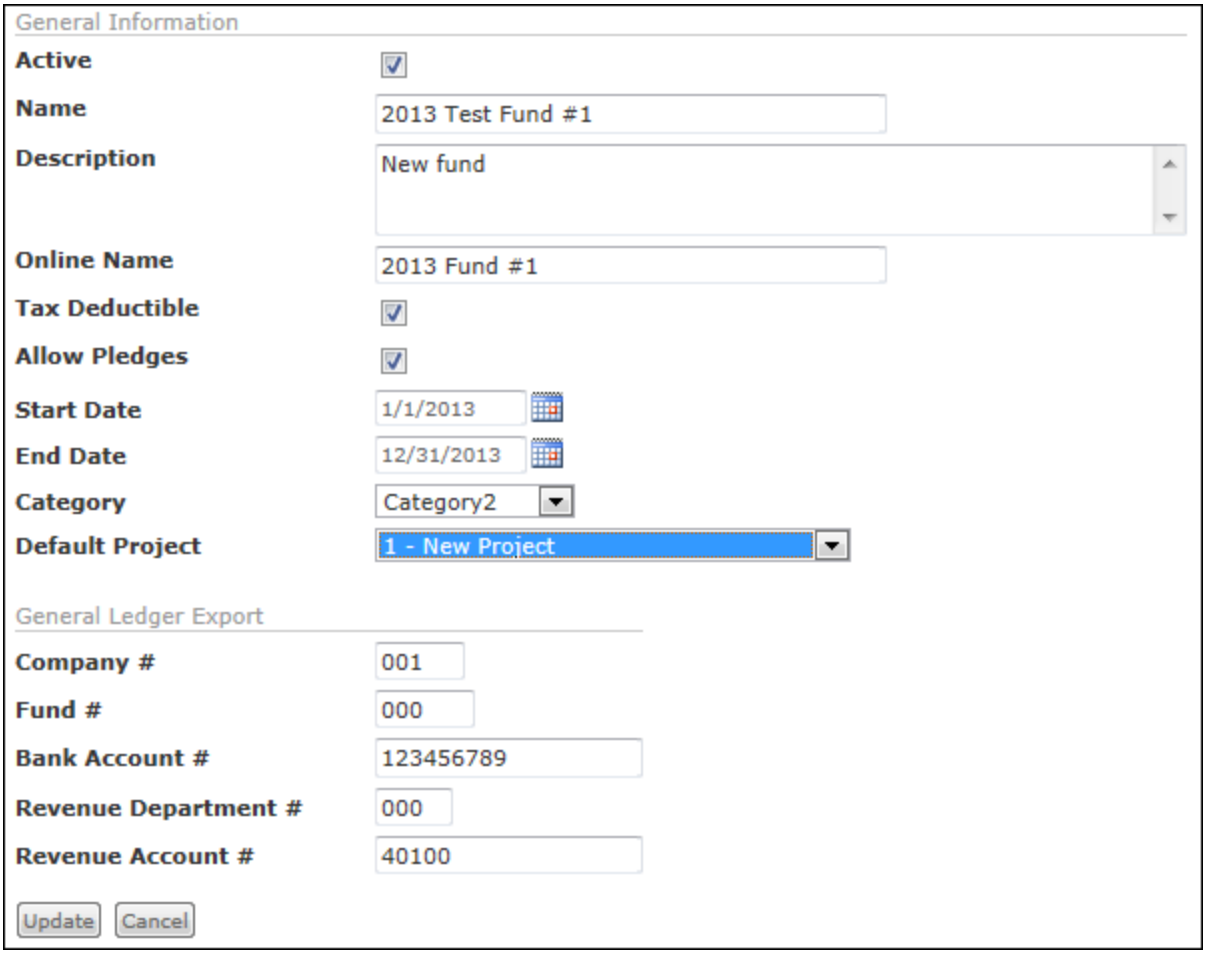
Create a New Fund

From the **Contributions** menu, click the **Fund Management** option. If this is the first access to this page, a prompt displays asking you to choose a Shelby v.5 Company. Select your organization name from the drop-down list and click the **Apply** button to add active Shelby v.5 funds to Arena. Note that Arena can only connect with one Shelby v.5 Company.

1. Click the **Add New Fund** icon at the lower right-hand corner of the page to add a new fund.



2. Complete all fields for this fund. To edit details of an existing fund connected to a Shelby v.5 Purpose, select the **Edit** icon next to the fund. Active funds with an Online Name and with current start and end dates are available for online giving.

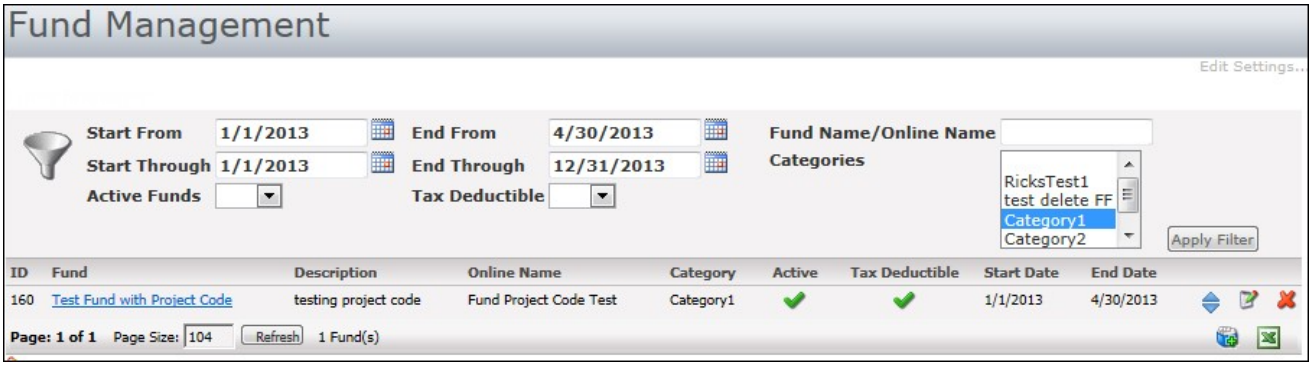


- **Active status** – Select if the fund is active. Active funds are available for Contribution Entry and online giving.
- **Name** – Enter the Name of the Fund.
- **Description** – Enter a description for the fund.
- **Online Name** – Enter the name to display online. Active Funds with an online name, valid start and end dates are available for online giving.
- **Tax Deductible** – Select if the fund is tax deductible.
- **Allow Pledges** – Select if you are going to allow pledges.
- **Start/End Dates** – Enter the start and end dates for this fund. Start and end dates determine the period the fund is available for online giving.
- **Category** – Select a category to associate this fund. Fund Categories are customizable. See your Arena Administrator.
- **Default Project** – You can optionally select a default Project Code for this fund.
- **Company** – Enter the Arena company number for this fund, such as 001 from Shelby v.5.
- **Fund #** - Enter the fund number.

- **Bank Account #** - Enter the bank account to use for this fund.
- **Revenue Department #** - Enter the revenue department number for this fund.
- **Revenue Account #** - Enter the revenue account number for this fund.
- **Project Code** - Enter the project code for this fund, if applicable.

3. Click the **Update** button to save your fund.

4. From the **Fund Management** page, you can edit existing funds, change the display order and use the filter options.



- **ID** – This is the identification number Arena assigns funds. If your organization uses Arena's online giving, you can use the funds to specify which funds to make available on a specific page.
- **Fund** – This is the name of the fund.
- **Description** – This is the description of the fund.
- **Online Name** – This is the name to use for online giving purposes.
- **Category** – This is the fund category associated with the fun.
- **Active** – A **checkmark** icon in this column indicates the fund is active.
- **Tax Deductible** – A **checkmark** icon in this column indicates the fund is tax-deductible. Please consult your tax advisor for IRS reporting guidelines for charitable contributions and tax deductibility.
- **Start and End Dates** – Use the start and end dates to filter by specific funds within a date range. (e.g., All funds with a Start Date = 1/1/2013 and End Date of 4/30/13, within the date range of 1/1/2013 and 12/31/2013

5. Click and hold the **Reorder** icon to change the order the funds display on the **Fund Management** page. The Contributions Application and Contribution Entry pages reflects the same fund order.

6. Click the **Edit** icon to edit a fund. You cannot edit some Arena Funds fields linked to Shelby v.5 Purposes.

7. Click the **Delete** icon to delete a Fund. You can delete funds with no associated Contributions.

8. Click the **Add New Fund** icon to add another fund. When connected to Shelby v.5, a checklist of active purposes display, listing all purposes not already in use in Arena. Use the check boxes to choose which purpose to tie to this fund, and click the **Update** button. Note that while it is possible to have Shelby v.5 Purposes connected to Arena, we strongly recommend against this practice due to the synchronization issues this situation creates.

Deleting Funds

You can delete a fund that does not have contributions.

In order to delete a fund with contributions, you need to delete or reassign contributions.

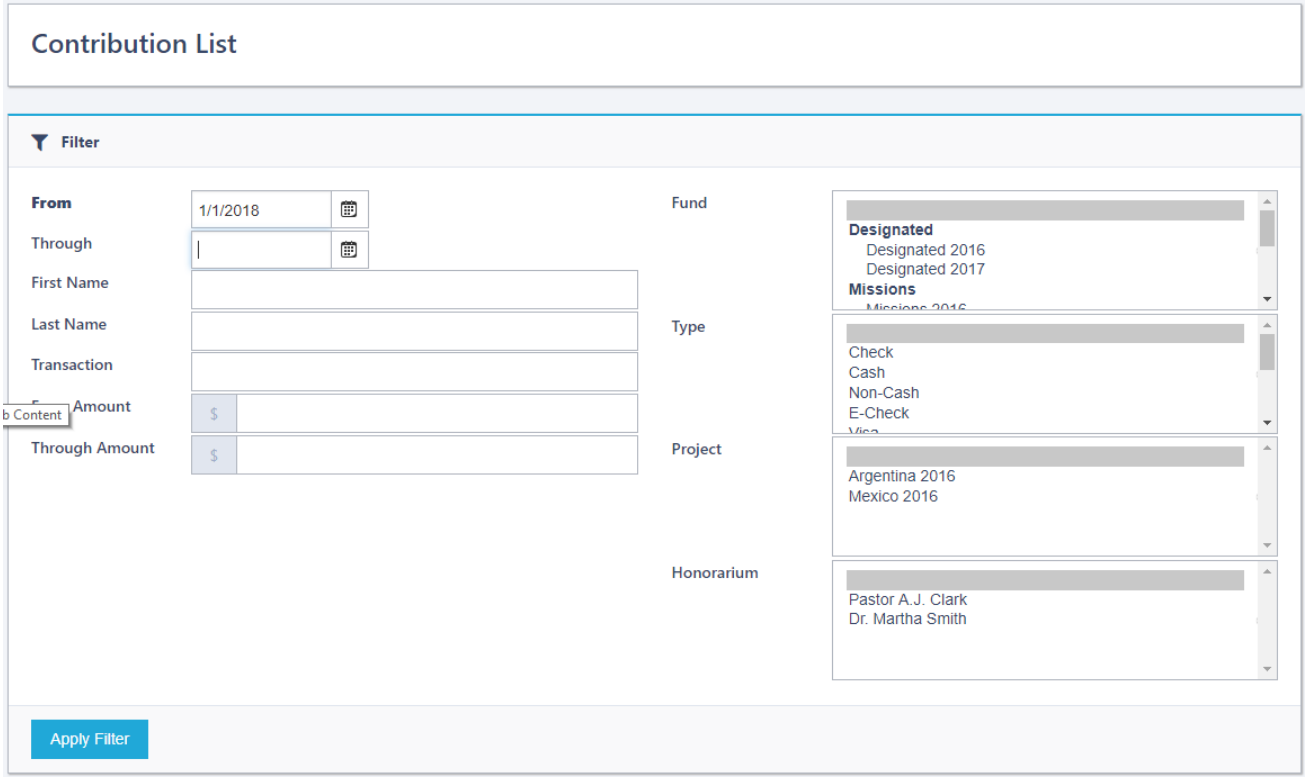
Associated Pledges are also deleted.

Contribution List

From this page you can edit and delete a batch, open the individual entry, make entry adjustments including refunds, display memos and check images, reassign an individual or multiple entries to another record, email selected giver, mail merge selected givers export the batch to Excel or bulk update selected records, finalize a single or multiple batches, and export a single or multiple batches.

Filters

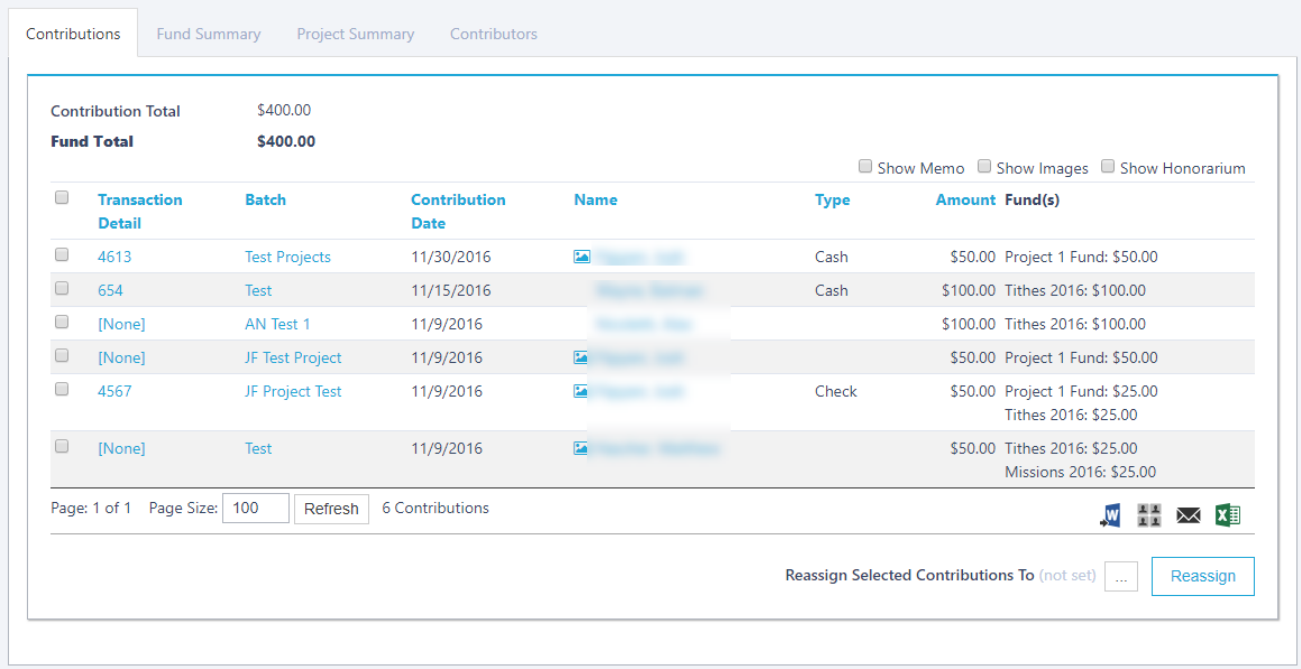
Use the filters on the top of the page to filter by date, name, fund, project, transaction type, or transaction number.



- **Date Filters** – You can filter by a specific date range. Enter the same date in both fields for a single date.
- **First and Last Name** – You can filer by an individual record. Wild cards (% and _) work in these fields.
- **Transaction** – You can filter by transaction ID number.
- **From Amount** - Enter a from amount or leave black for any amount.
- **Through Amount** - Enter a through amount or leave blank for any amount.
- **Fund** – You can filter by fund. Funds display by category and then by the same order as on the **Fund Management** page. Press the "Ctrl" key to select multiple funds. If you select no fund, all contributions for all funds display.
- **Type** – You can filter by payment method. Press the "Ctrl" key to select multiple types.
- **Project** – Use this filter to select specific projects. Press the "Ctrl" key to select multiple projects. If you select no fund, all contributions for all projects display.
- **Honorarium** - If you are using honorariums, you can enable this filter in module settings by selecting "True" on the **Show Honorarium Filter** option. Press the "Ctrl" key to select multiple types.

Contributions Tab

This tab displays all contributors based on the filters you specify.



Click once on any column heading to sort the data, across all pages, in ascending or descending order.

- **Show Memo** – Select this check box to display all entered memo notes for each contribution.
- **Show Images** – Select this check box to display a thumbnail of scanned checks. Click the thumbnail to enlarge the scanned check.
- **Check Boxes** – Use check box column to select specific transactions to reassign to another person or update date of contribution. Select the top check box to select all contributions on the active page.
- **Transaction Detail** – This column displays the transaction number for payment gateway contributions or check number for manually entered contributions. ("[None]" displays for manually entered contributions that do not have a check number.) Click a ***Transaction Detail*** link to display details and make adjustments.
- **Batch** – This column displays the batch to which the contribution is associated. Click a ***Batch*** link to display the details of the batch, including editing and deleting the batch.
- **Contribution Date** – This column displays the date of the contribution.
- **Name** – This column displays the person who gave the contribution. Click the ***Name*** link to display the person detail page.
- **Type** – This column displays the payment method for the contribution.

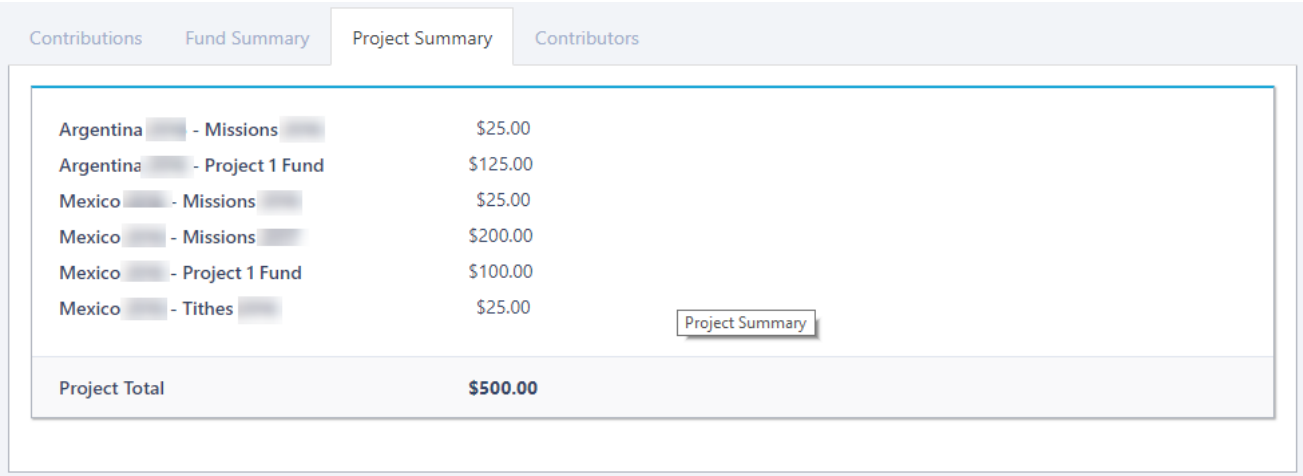
- **Amount** – This column displays the total contribution amount.
- **Fund** – This column displays the funds to which the contribution is applied.
- Click the **Delete** icon to delete a contribution. You can delete any non-finalized contribution.
- **Page Size** – The value in this box represents the number of contributions to display per page. The value to the right of this box represents the total number of contributions, based on the applied filters.
- **Bulk-update selected Contributions** – Use this field to update the contribution date for selected transactions.
- **Reassign Person** – Use this option to reassign selected transactions to another person.
- Click the **Bulk Update** icon to update all the selected records through Person Bulk Update.
- Click the **Merge Member** icon to merge selected records into one record.
- Click the **Send Email** icon to send email to the selected names through Arena Communications.
- Click the **SMS Message** icon to send a SMS Message to the selected names.
- Click the **Word Merge** icon to mail merge the selected names with an available document.
- Click the **Excel** icon to export selected records to an Excel spreadsheet. When exporting to Excel, all fields from the active page export in addition to required fields. Required fields are set in List Configuration.

Fund Summary Tab

This tab displays a contribution summary for all active funds based on the filters you specify.

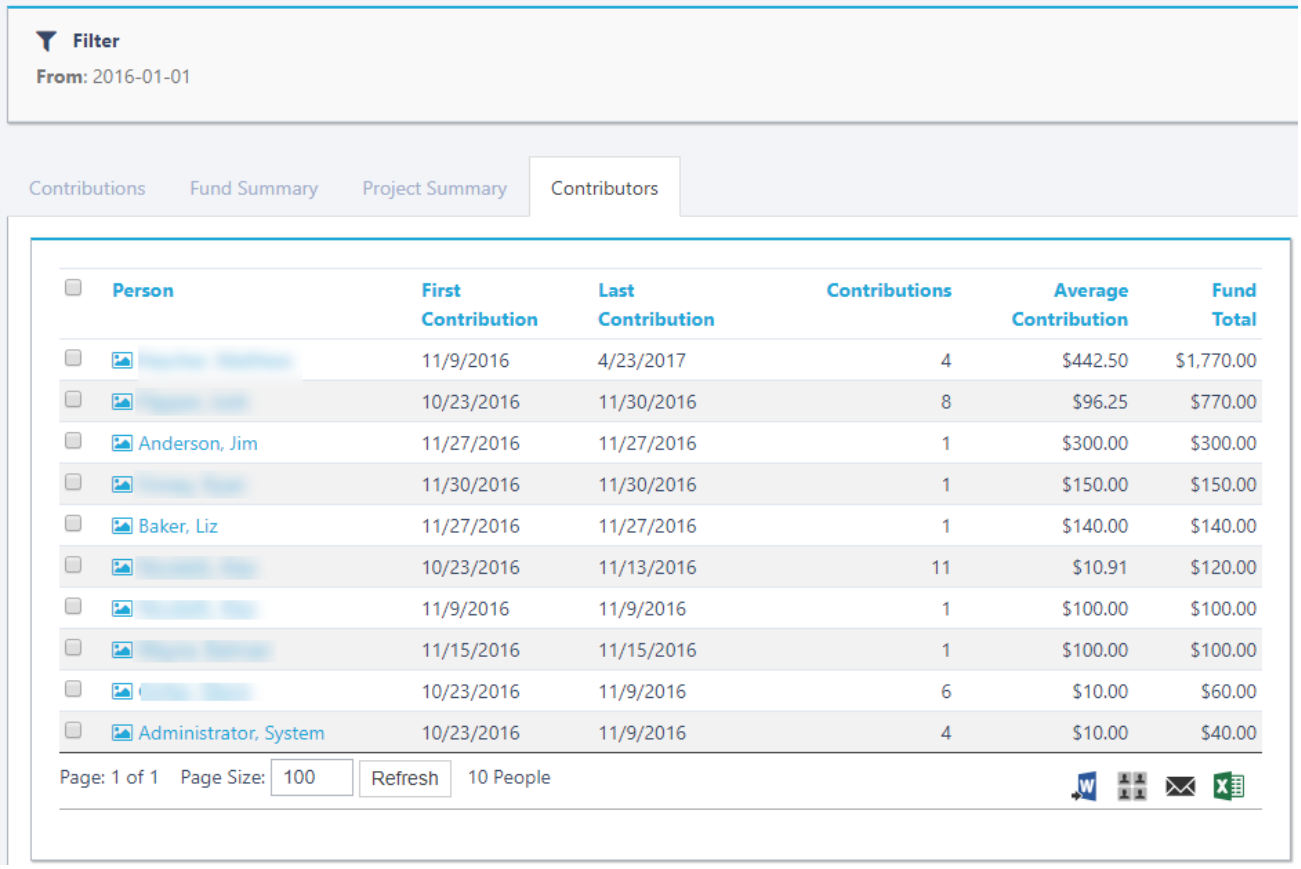
Project Summary Tab

This tab displays a contribution summary for projects based on the filters you specify.



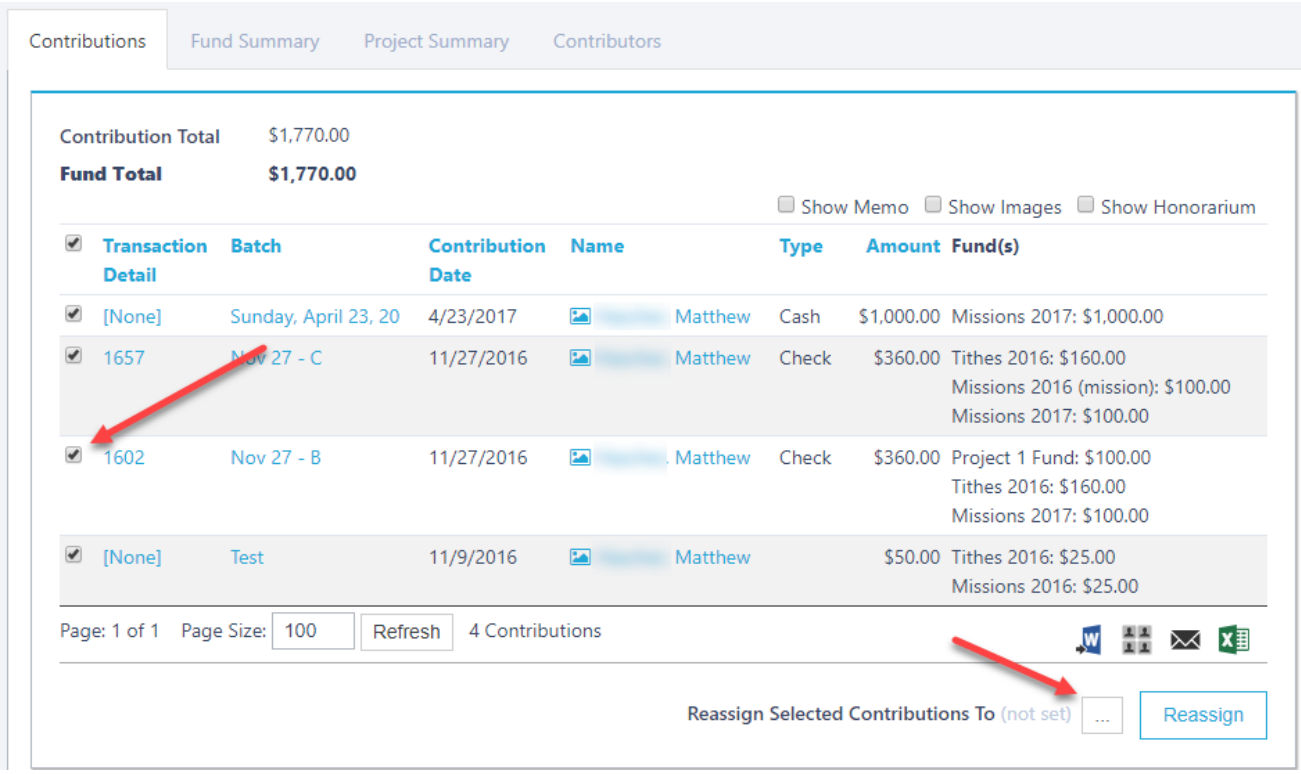
Contributors Tab

This tab displays all Contributors based on the filters you specify. The results display the person's name, dates of first and last contribution, number of contributions, the average contribution amount and the total contribution. You can search the results within a single column. You can select contributors and export to Excel by clicking the **Export to Excel** icon.



Reassign a Contribution

1. From the **Contributions** tab, select the Contribution(s) you wish to reassign.

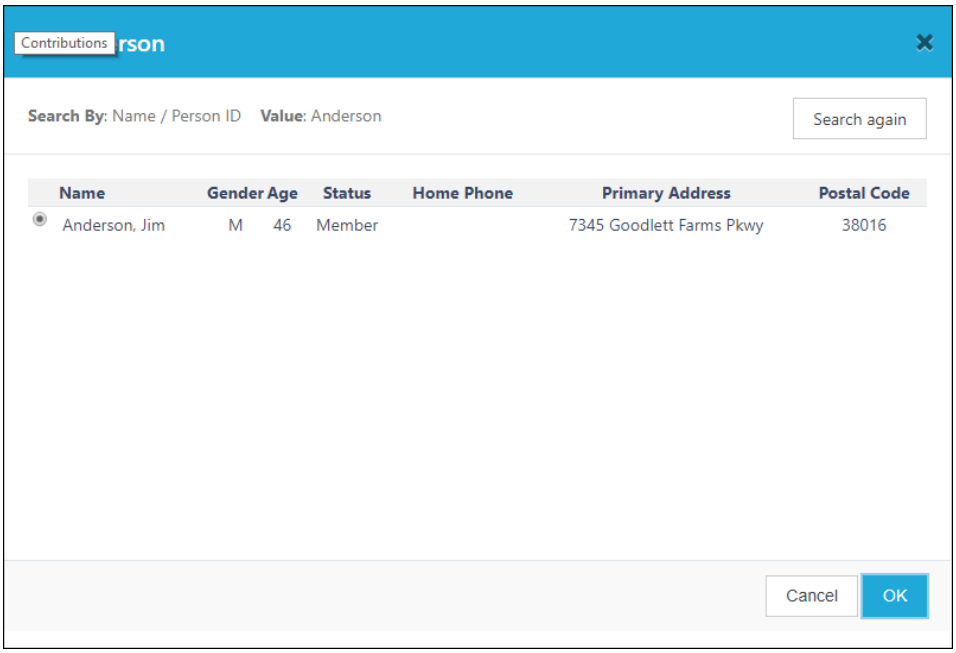


2. Click the **Reassign** button to reassign the selected contributions to another person.

3. Search for the correct person.

4. Select the radio button next to the person's name.

5. Click the **Select** button. The Contribution reassignment is complete when you click Select.

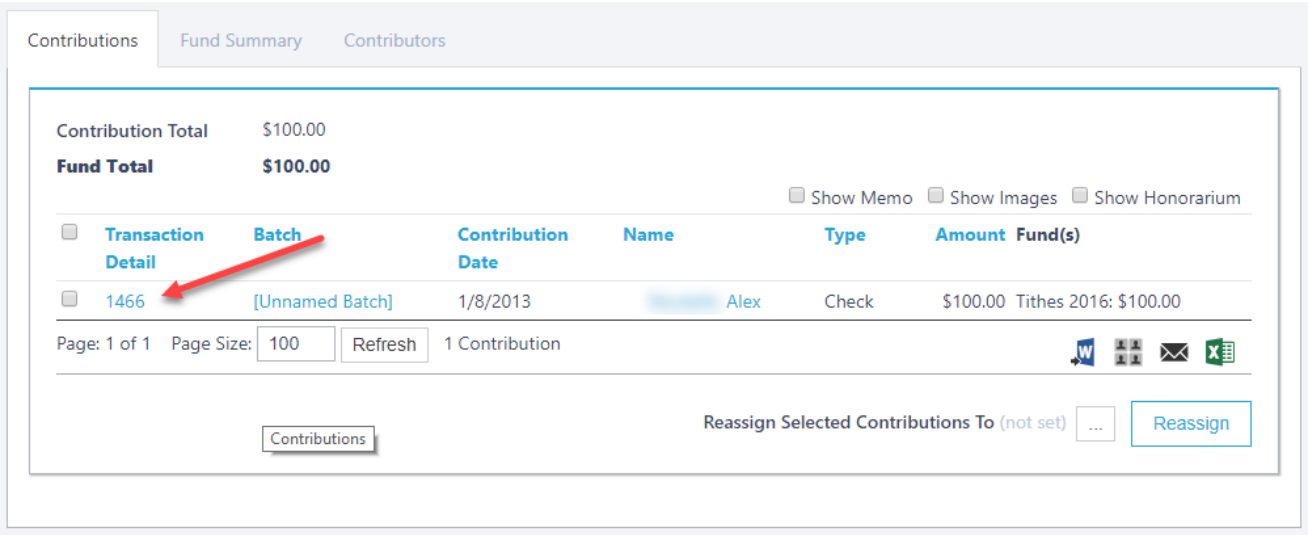


6. Click the **Ok** button.

Make a Contribution Adjustment

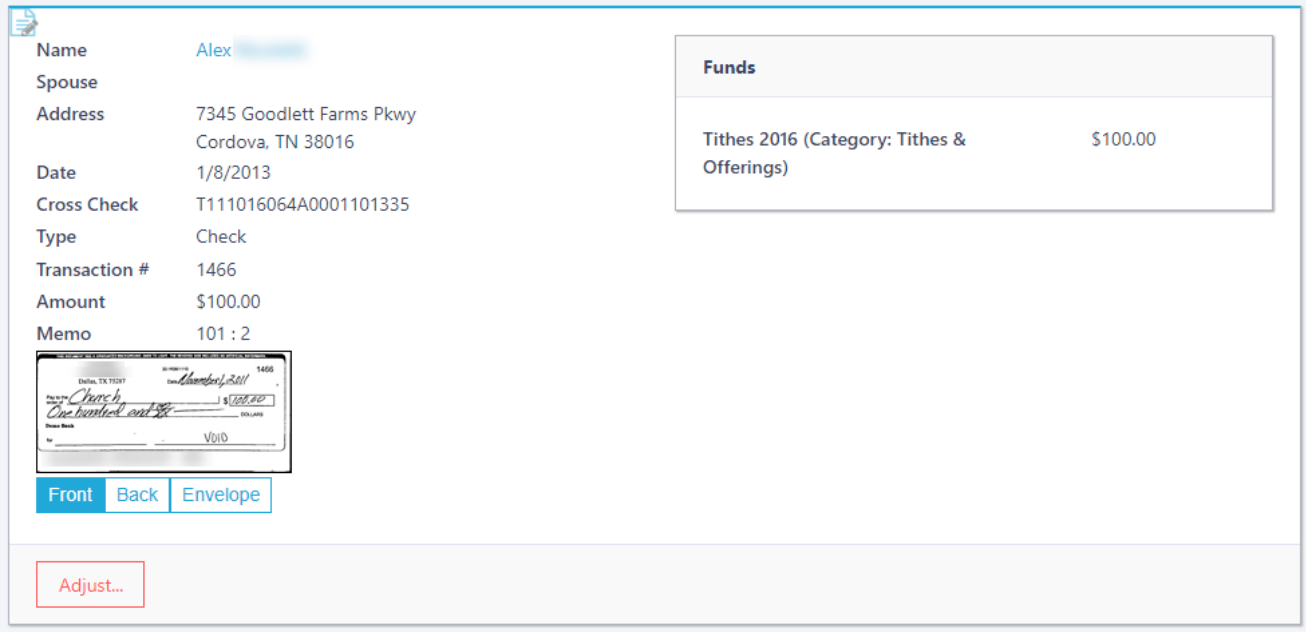
You can process adjustments for one-time and repeating (whole, not partial) payments. You can process adjustments for finalized and non-finalized payments.

1. From the **Contributions** tab, select the Contribution to adjust.

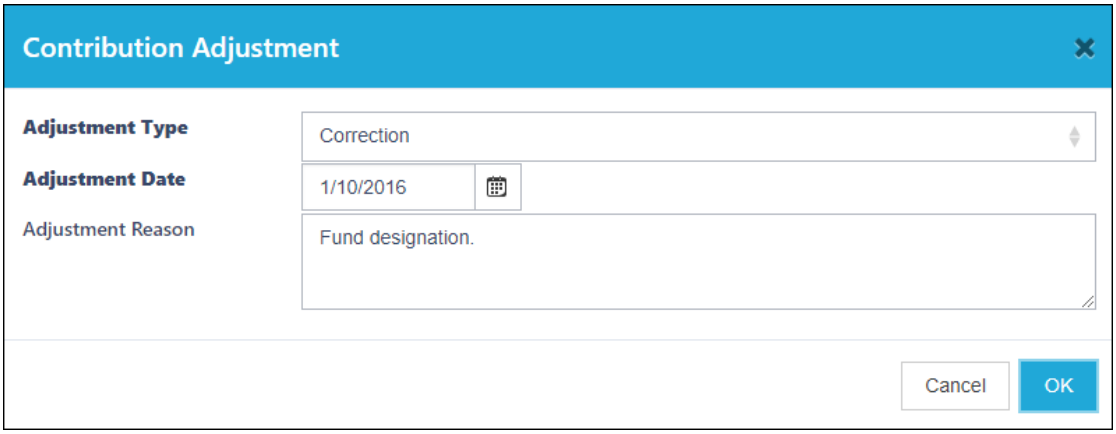


2. Click the **Adjust** button.

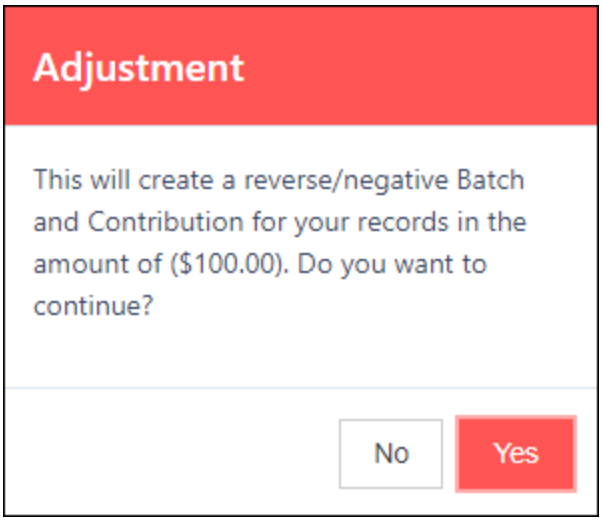
NOTE: You can view the front and back image of a scanned check or the scanned envelope by clicking the Front, Back, or Envelope buttons.



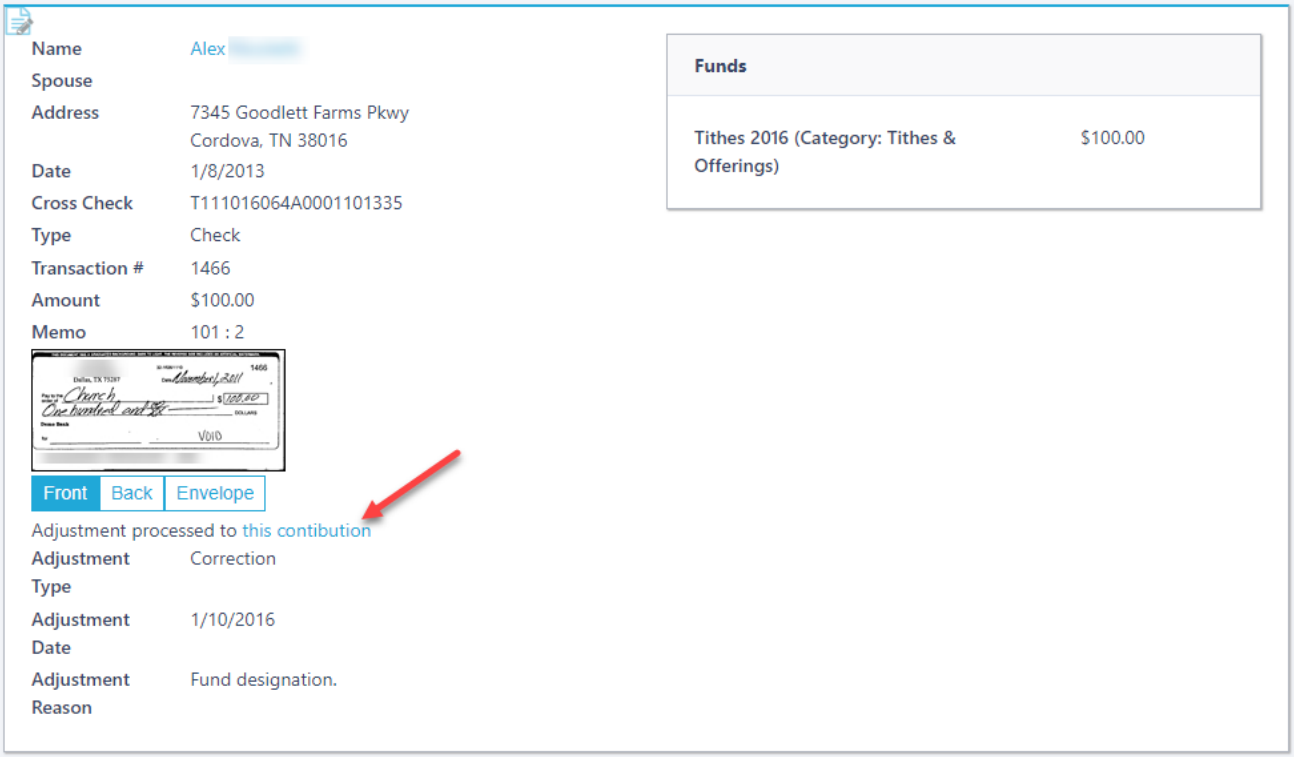
3. From the **Adjustment** pop-up select the adjustment type, verify adjustment date, and enter a reason. If the Adjustment Type has "Allow Adjustment" and the original transaction was made electronically, adjustment is processed and creates a negative entry in Arena and with the payment gateway provider. If "Allow Adjustment" is not marked, Arena creates a negative contribution. The original contribution contains the desired selections. Check with your payment gateway provider regarding the allowable time to process a refund from the original payment.



4. Click the **OK** button.

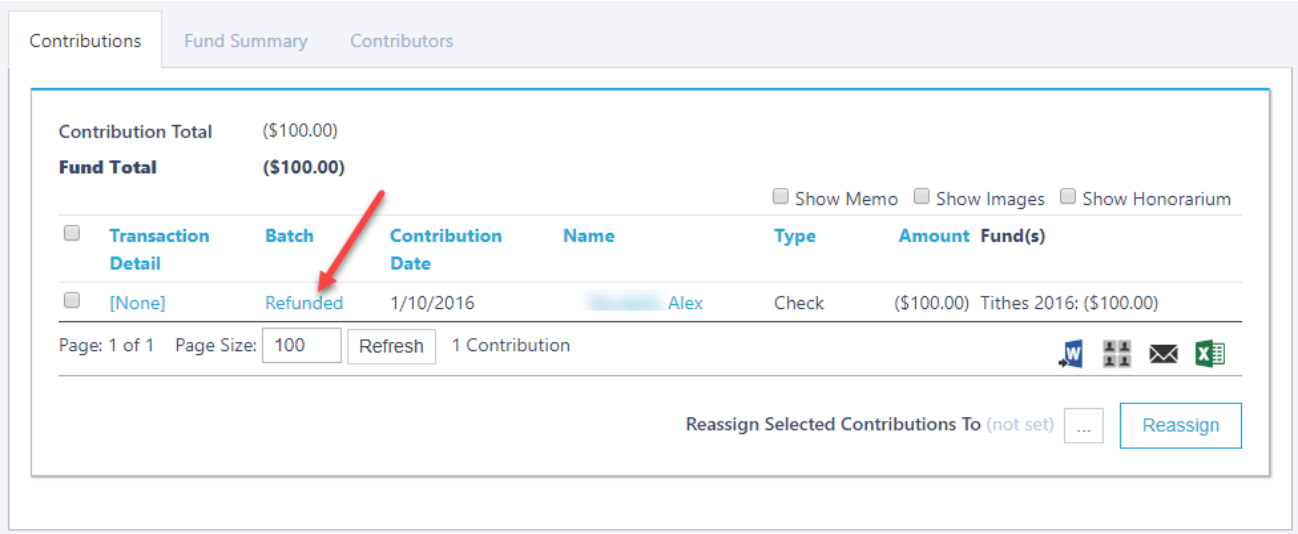


5. On the confirmation pop-up, click the **Yes** button.



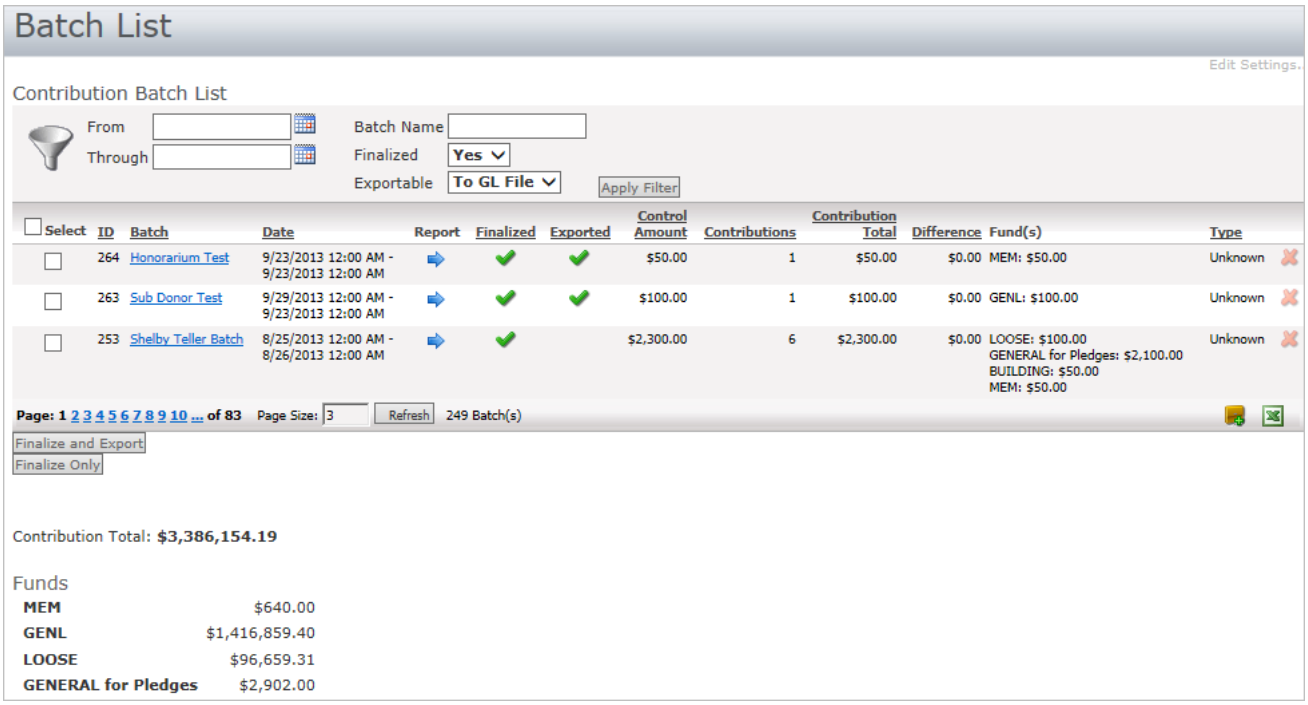
The adjustments display on the **Contribution List** page and on the **Contributions** tab of the **Person Detail** page.

NOTE: Deleting a contribution adjustment, removes the adjustment from original contribution.



Batch List

Based on the applied filters, the batch list displays all batches, including online batches. During any payment transaction (online or kiosk), Arena first checks if a batch exists for that day (based on Process Time under Administration/Payment Gateway) and payment type (VISA/MC, AMEX, Discover, ACH). If so, it just drops the new transaction into the existing batch. If not, it creates a new batch to handle those transactions for the day. The batch name used for Online Giving is controlled by an OrgSetting. The batch name used for Donation Kiosk is controlled by that module setting.

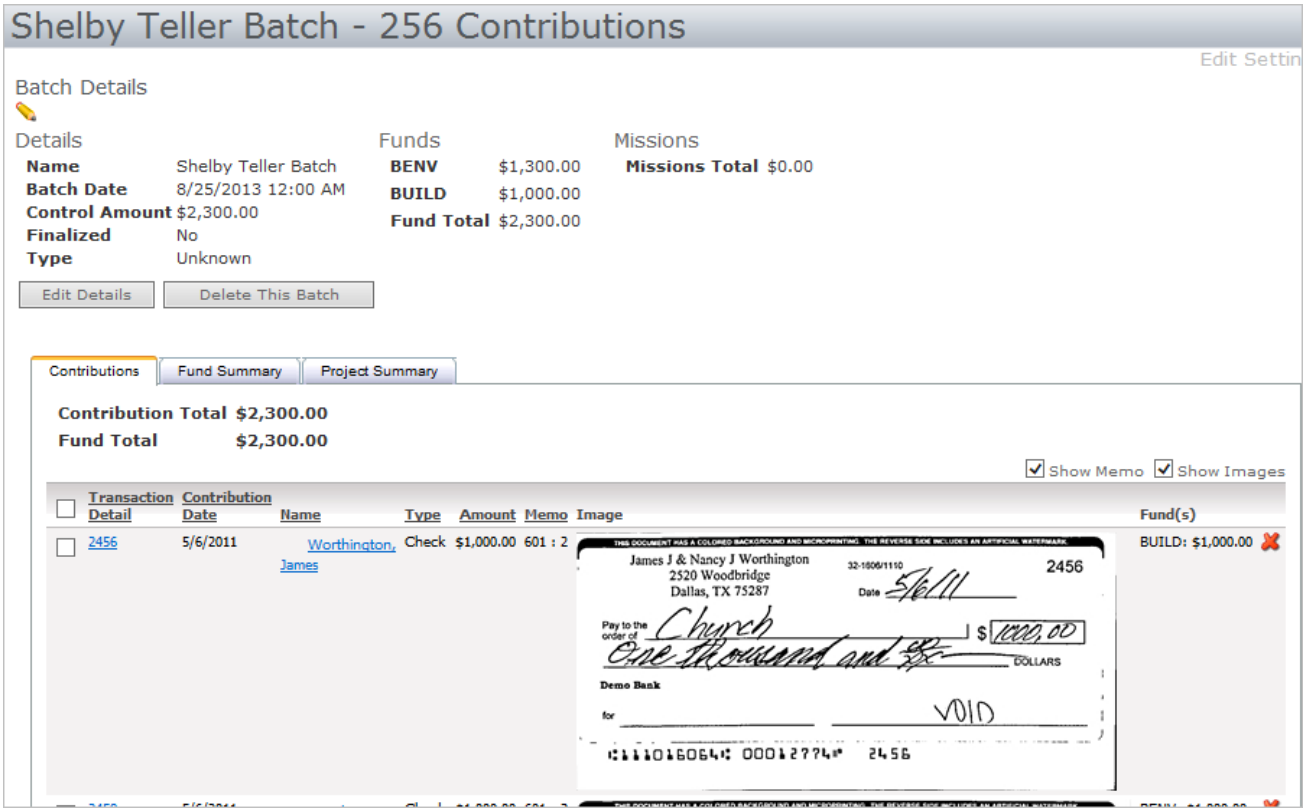


- **Filters** – Use the date, batch name, finalized and exportable filters.
- **Select** – Check the box to select batches to export to Shelby v.5 General Ledge (GL), Finalize, or export to Excel.
- **ID** – This is ID number for the batch.
- **Batch** – This is the batch name. Click the ***Batch*** link to display batch details.
- **Date** – This is the date for the batch.
- **Report** – Click the **Report** icon to view the batch report.
- **Finalized** – A **Checkmark** icon indicates a finalized batch.
- **Exported** – A **Checkmark** icon indicates an exported batch.
- **Contributions** – This is the number of transactions in the batch.
- **Contribution** – This is the batch total.

- **Difference** – This is the difference in the batch total and the contribution entries.
- **Funds** – This displays a list of contribution amount(s) and fund(s) that make up the batch.
- **Type** – This indicates the payment method for contributions in the batch. Unknown batches indicate unknown or mixed payment methods. Transactions for Pay Pal Express now record as "PayPal Express".
- **Finalize and Export button** – Use this button in conjunction with the batch check boxes to create the GLTRN 2000 export file. You can export any batch on this page.
- **Finalize Only button** – Use this button in conjunction with the batch check boxes to finalize selected batches.
- **Contribution Total** – This is the contribution total for all batches displayed across all pages.
- **Funds** – This column displays fund totals across all pages.

Batch Details

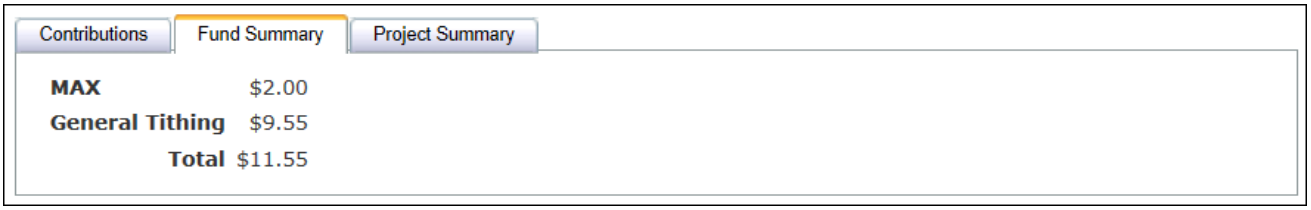
From this page you can edit and delete a batch, open the individual entry, make entry adjustments including refunds, display memos and check images, reassign an individual or multiple entries to another record, email selected giver, mail merge selected givers, export the batch to Excel or bulk update selected records, finalize single or multiple batches, and export a single or multiple batches.



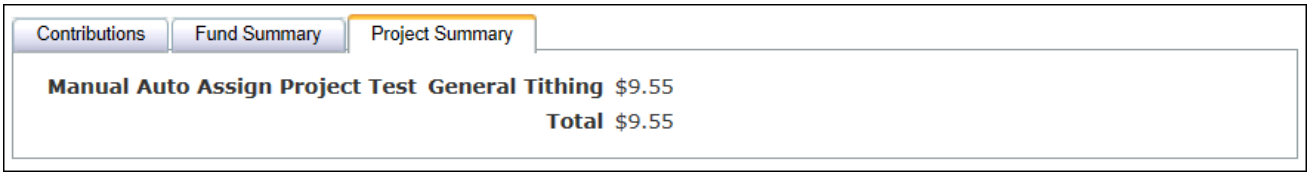
The **Contributions** tab shows the following:

- **Transaction Detail** – This column displays the transaction number.
- **Contribution Date** – This column displays the date of the contribution.
- **Name** – This column displays the user name of the contributor.
- **Type**- This column displays the type of transaction.
- **Amount** – This column displays the total contribution amount.
- **Funds** – This column displays the funds to which the contribution was applied.
- **Show Memo** – Select this check box to display all contribution memos.
- **Show Images** – Select this check box to display all scanned check images.

The **Fund Summary** tab displays the summary of the batch by fund.

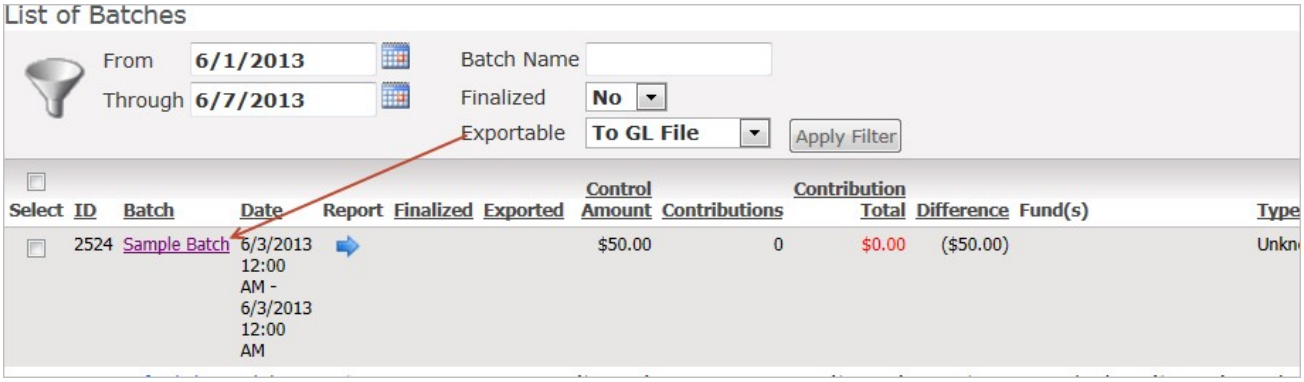


The **Project Summary** tab displays the summary of the batch by fund.



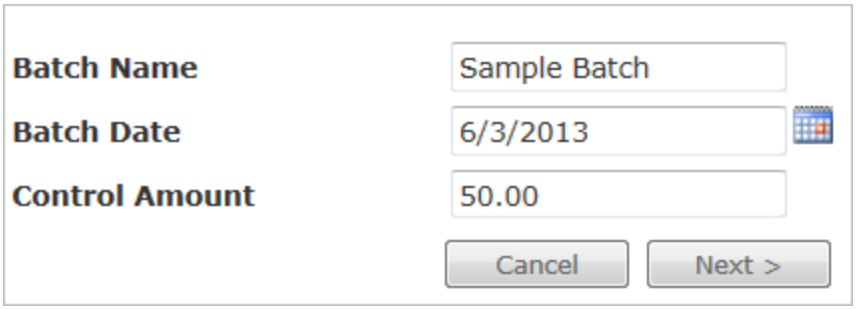
Edit a Batch Not Finalized

1. From the **Batch List** page, click the ***Batch*** link to edit.

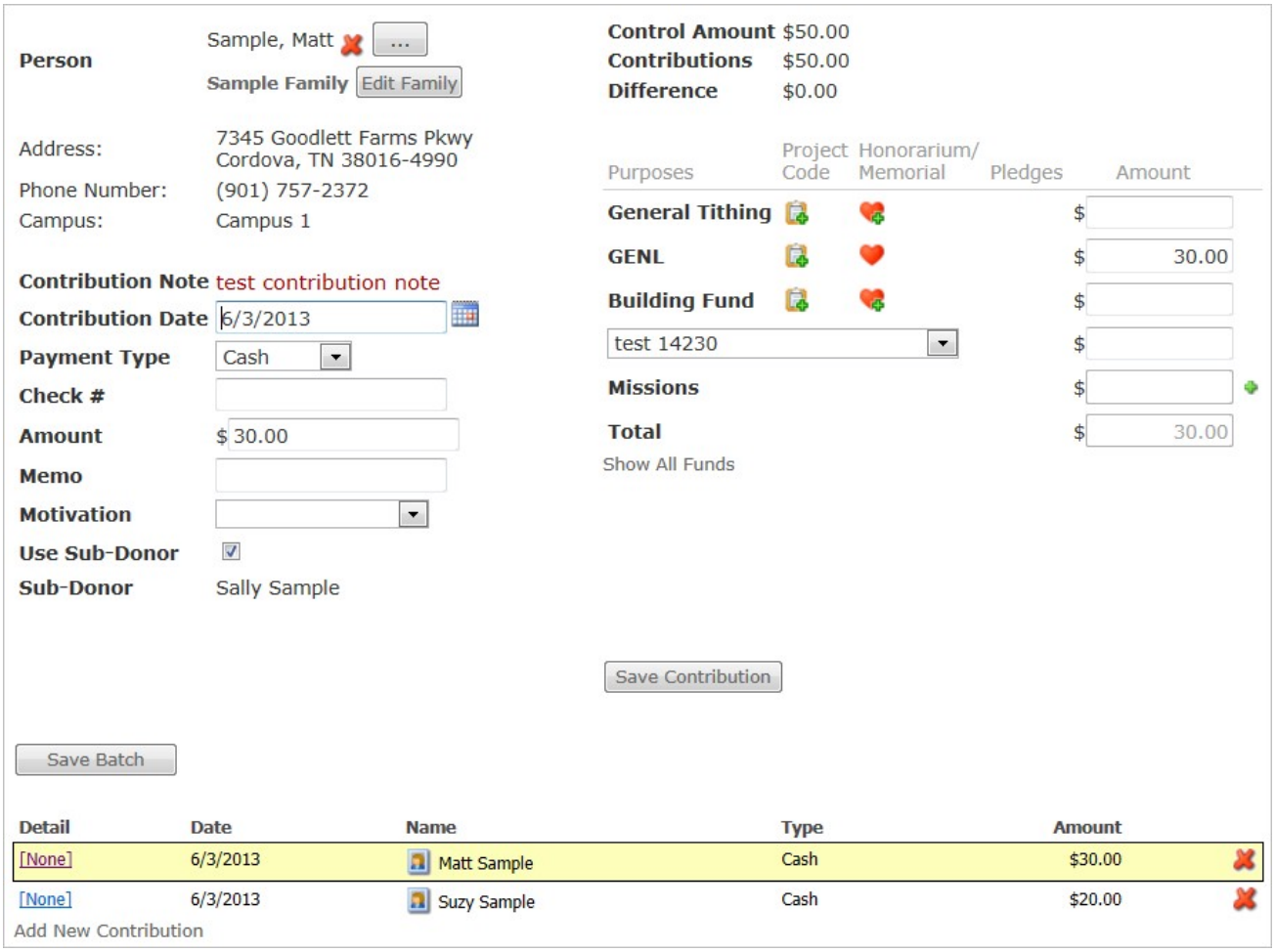


2. Click the **Edit Details** button.

3. Click the **Next** button to view each the first contribution entry.



4. You can adjust an existing contribution, including adding a contribution.



5. Click the **Save Contribution** button to save each contribution as you review and edit.

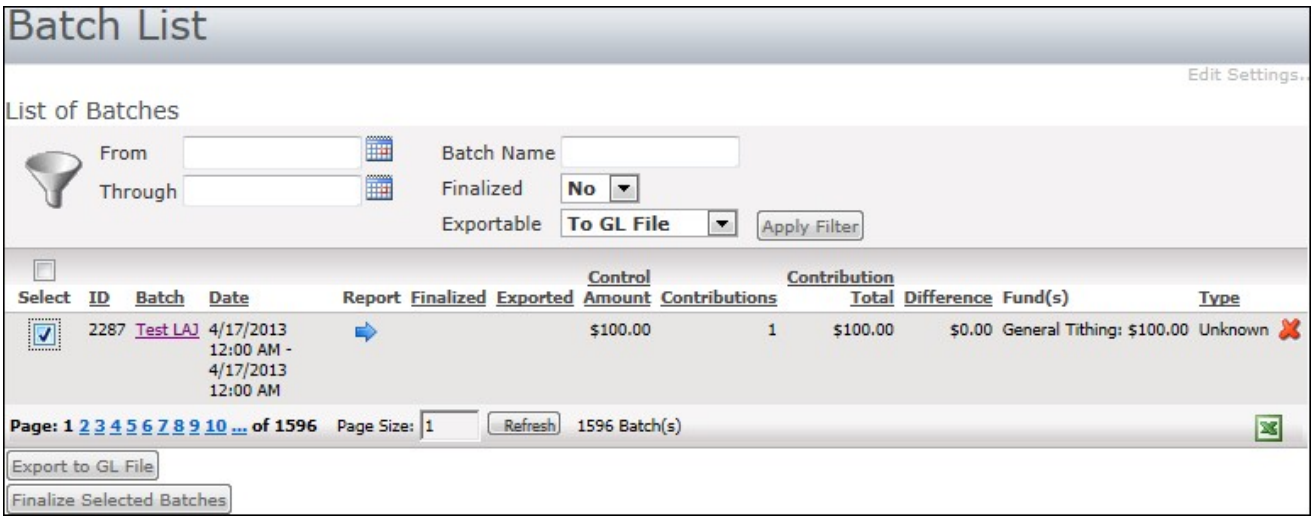
6. Click the **Save Batch** button.

Finalize and Export a Batch from the Batch List Page

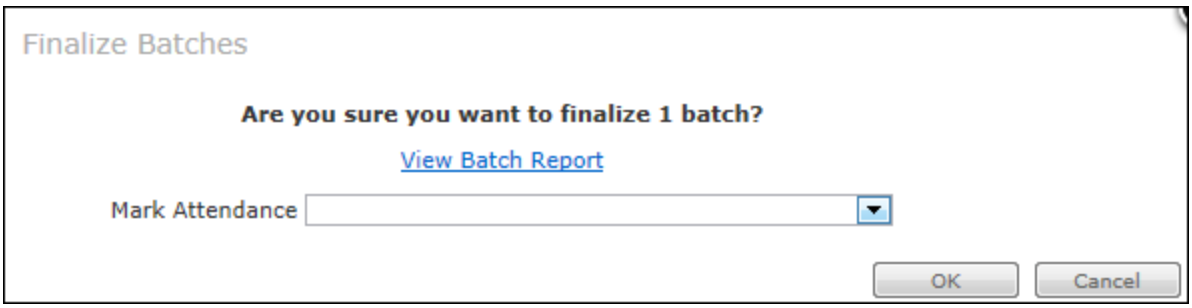
The GLTRN2000 file includes all project codes.

1. Click the **Select** check box for all batches you want to finalize. Use the parameters in the filter area to locate the desired batches.

2. Click the **Finalize Selected Batches** button.

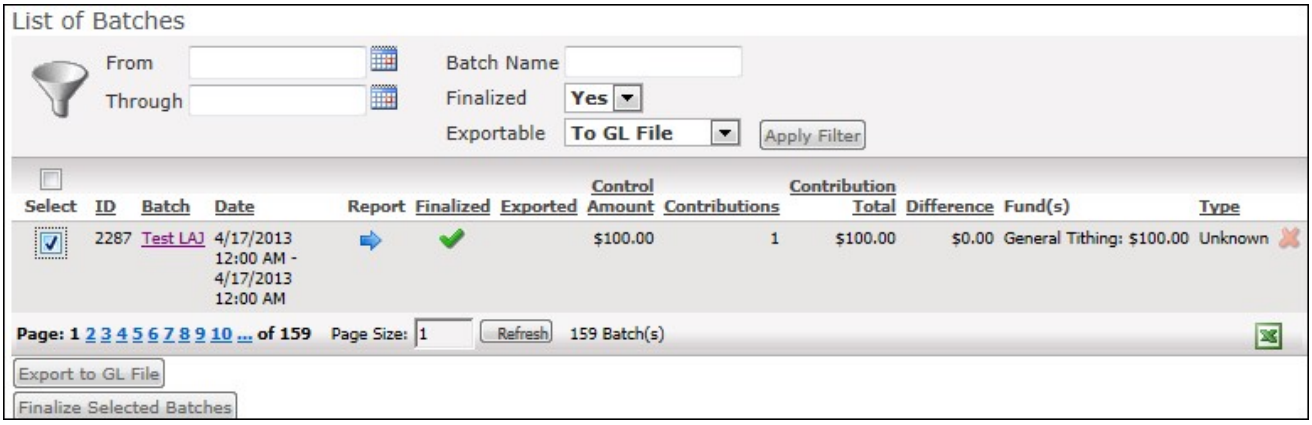


3. From the pop-up window, click the ***View Batch Report*** link to view the batch report.



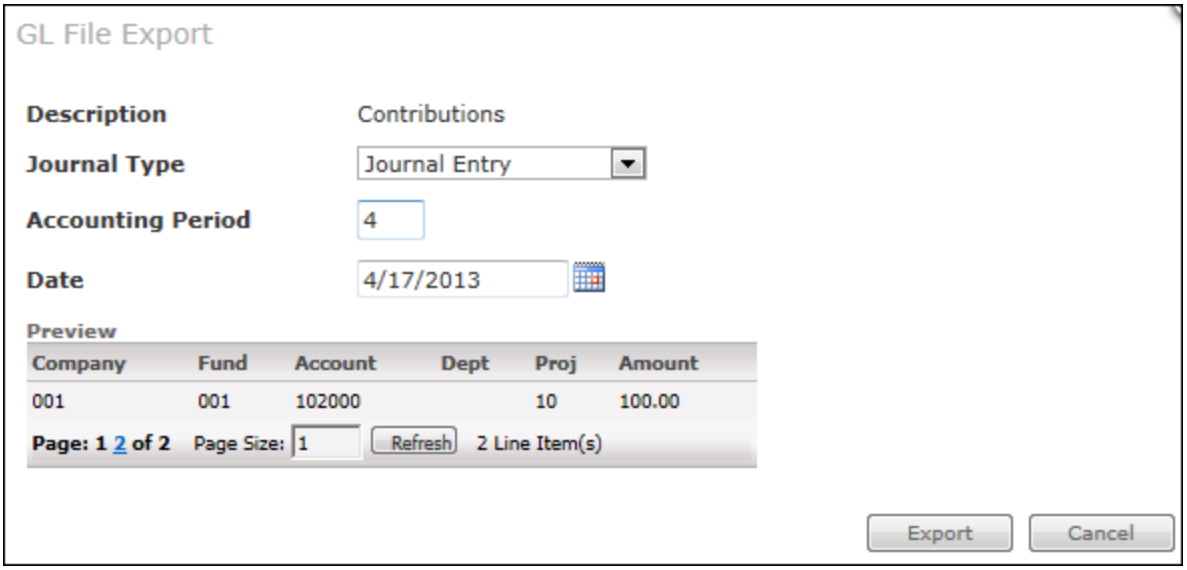
4. Click the **OK** button.

5. If you are ready to export the batch, select **Yes** to filter to finalized batches.



6. Click the **Export to GL File** button.

7. Select Journal Type, enter the Accounting Period and modify Date. The default date is the current date. If using Project Codes, this shows on the income line in Shelby v.5 General Ledger.



8. Click the **Export** button.

Save the GLTRN200 in the ssShelby v.5.dat folder. This file is ready for Shelby v.5 General Ledger.

NOTE: Non-cash gifts are often given Contribution credit for a different amount than the GL entry.

Import Contributions to Shelby v.5

To import the GLTN2000.txt file:

1. Open Shelby v.5 Journal Entries module. When opening Shelby v.5 Journal Entries module, the import process begins automatically if the GLTN2000.txt file is present in the SSSHELBY v.5.DAT folder.

2. Click the **Yes** button on the Import Entries pop-up.

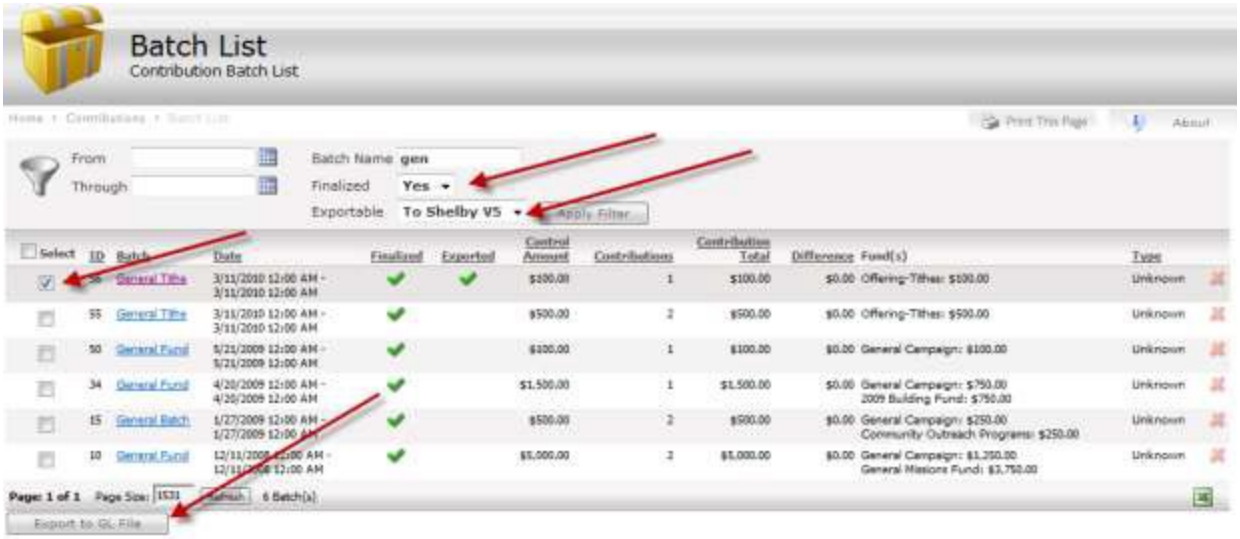
3. Select the desired **Fiscal Year**.

4. Click the **OK** button.

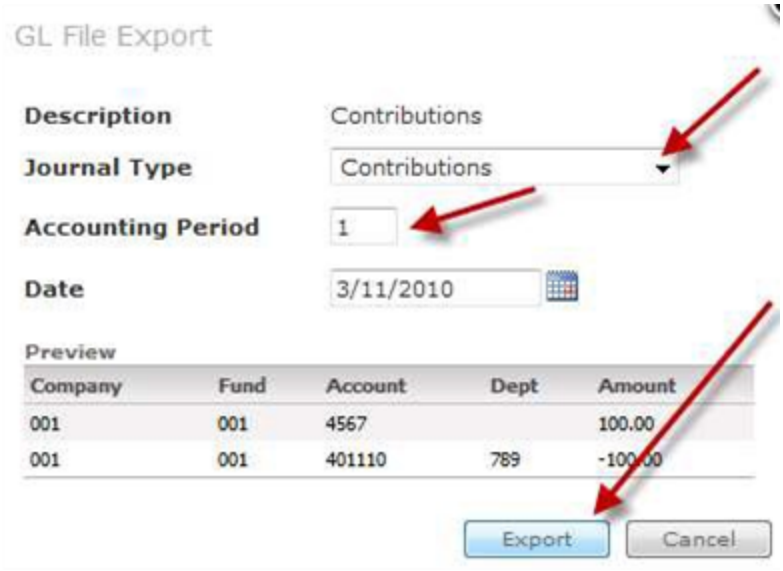
Create an Export File from the Batch List Page

You can export batches from Arena and import to Shelby v.5 General Ledger, Shelby v.5 Multi-Link, and GL Plus. If your organization is not using Shelby v.5, you can still export the XML file.

1. From the **Contributions** menu, select the **Batch List** option.
2. Use the **Filters** to display batches you want to finalize.
3. Click the **Select** check boxes for all batches you want to finalize.
4. Click the **Export to GL File** button.



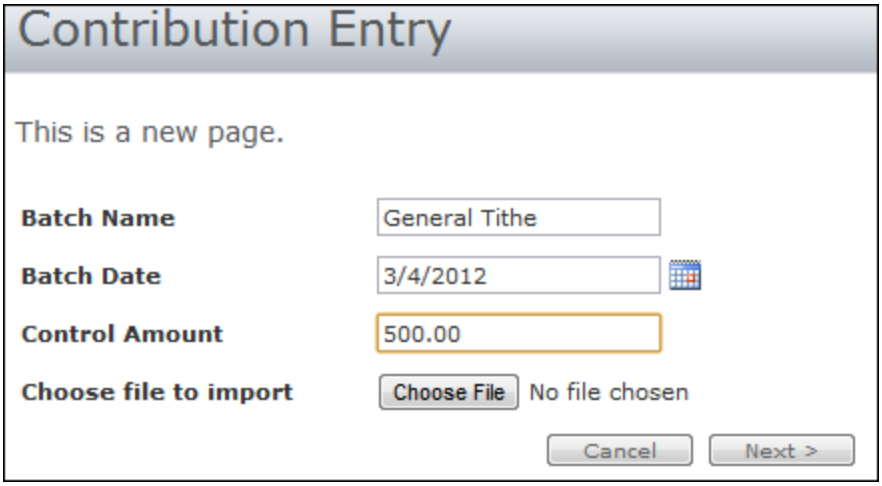
5. Select the **Journal Type**.
6. Enter the appropriate **Accounting Period**.
7. Click the **Export** button.



Import a ShelbyTELLER batch

Using this option, all ShelbyTELLER contributions import to Arena, including association to Project Codes.

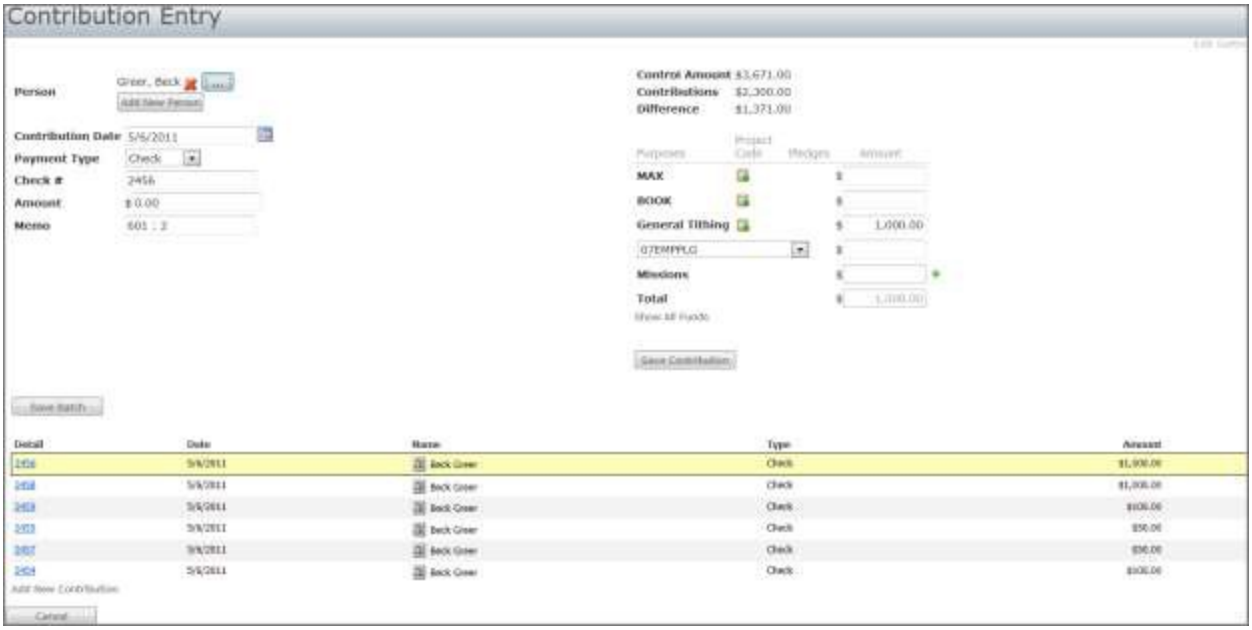
1. From the **Contributions** menu, click the **Contributions Entry** option.
2. Enter a **Batch Name**, **Batch Date**, and **Control Amount**.



3. Click the **Choose File** button.
4. Locate and upload **ShelbyTELLER XML** file.
5. Click the **Edit Details** button to review and/or edit each contribution.

6. Click the **Next** button.

7. From this page, you can review and adjust each contribution.

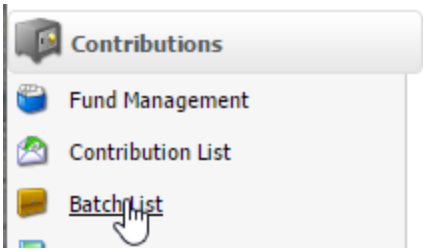


8. Once you review and/or adjust each contribution, click the **Save Batch** button.

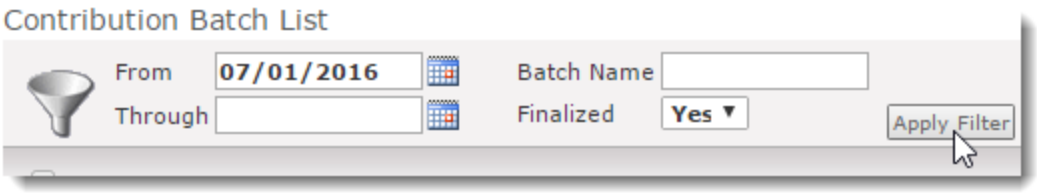
Copy a Batch

Follow the steps below to copy a batch that has already been finalized.

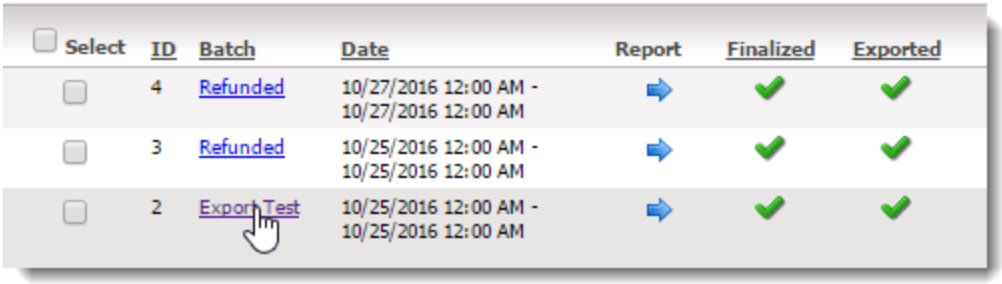
1. Click on the **Batch List** menu option.



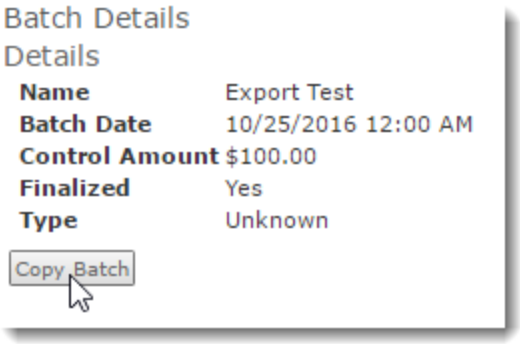
2. Enter a date range and select "Yes" on the Finalized filter, then click the **Apply Filter** button.



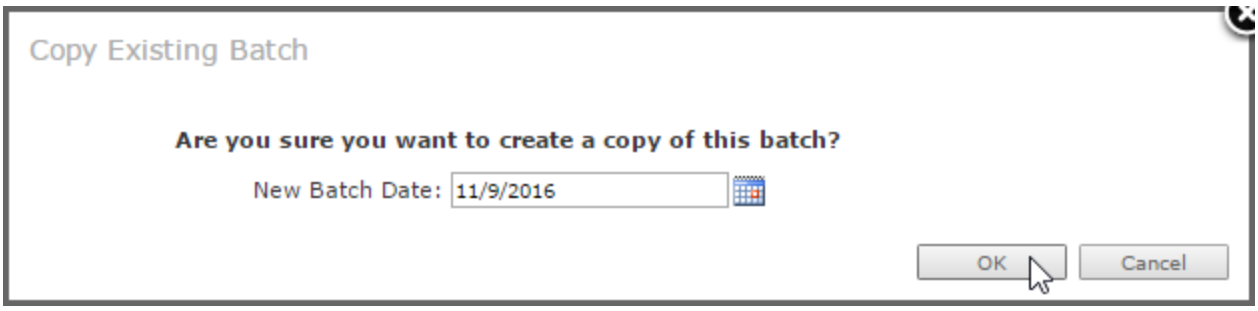
3. Click on the batch that you would like to copy.



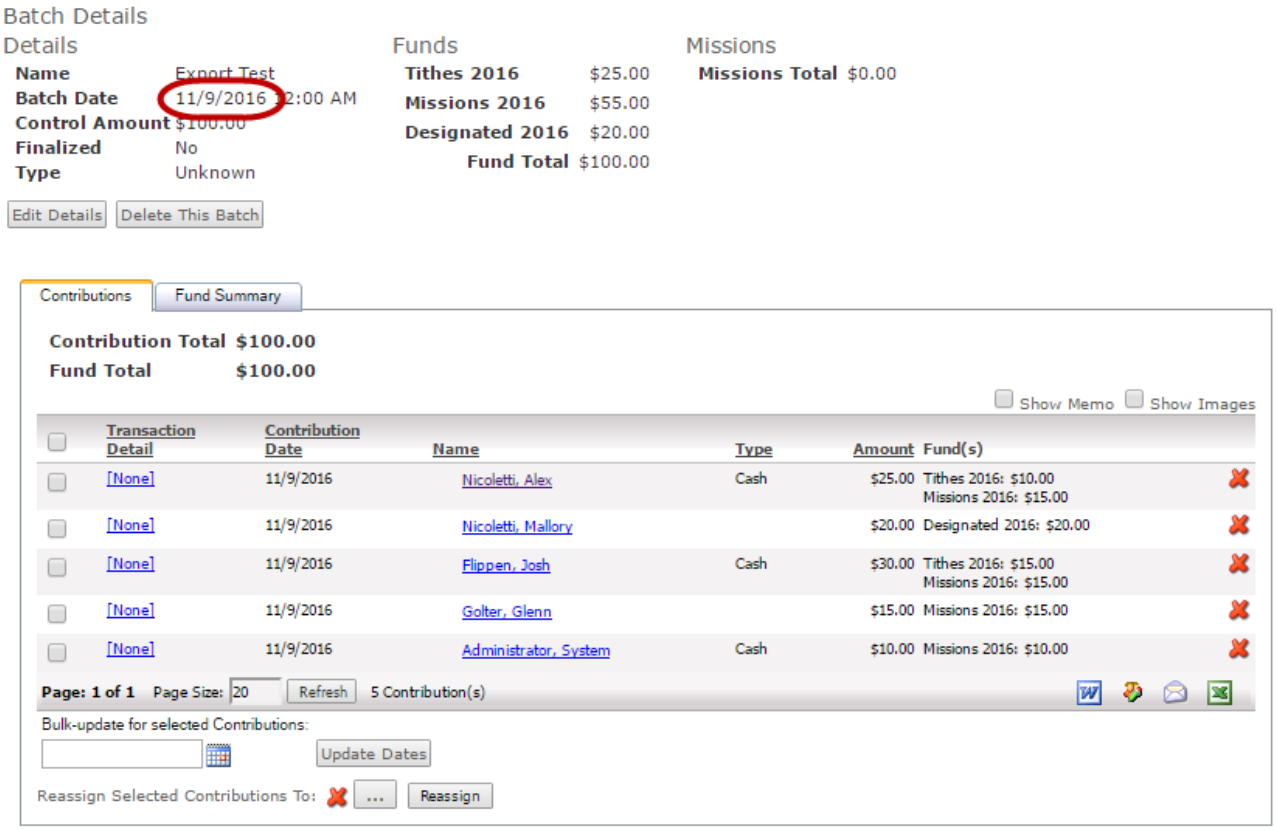
4. Click on the **Copy Batch** button.



5. Enter the date for the new batch and then click the **OK** button.

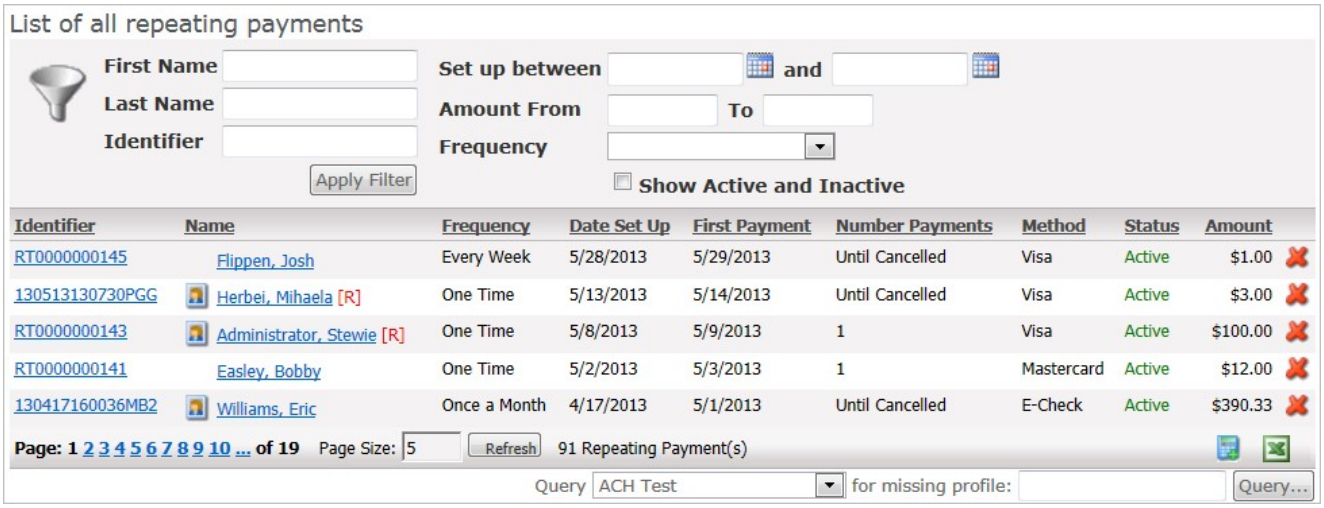


6. The new batch copy appears with the date that you entered.



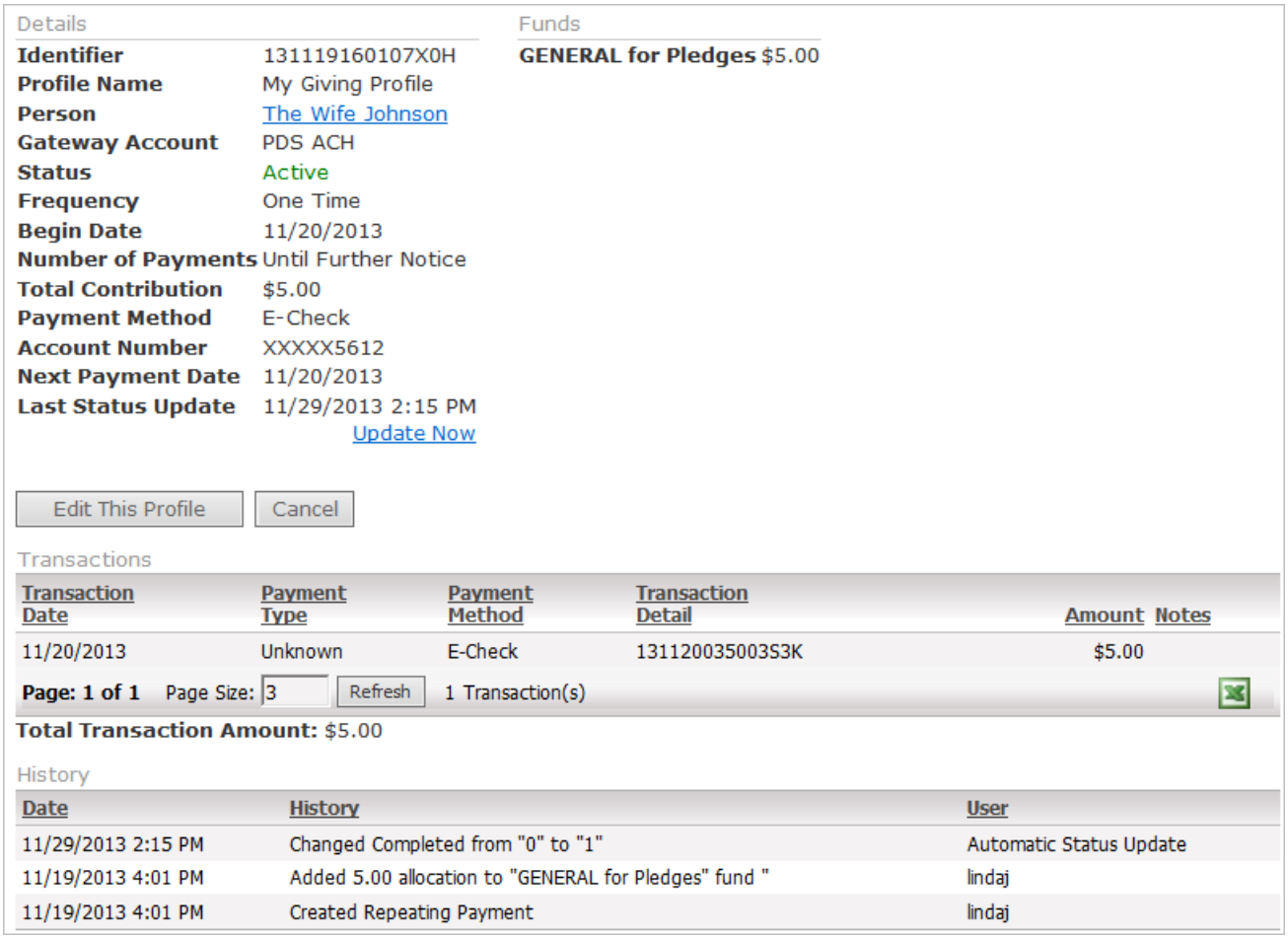
Repeating Payments

From the **Contributions** menu, click the **Repeating Payments** option. The option allows you to view and edit all repeating payments for your members. This list displays the Identifier code for the transaction, the member's Name, the Frequency of the payment, the date of the First Payment, the total Number of Payments, the payment Method, the Status of the repeating payment, and the Amount of the total periodic payment (not the total of all payments over all periods) for that transaction.



- **Identifier** – This column displays the link to the repeating payment profile.
- **Name** – This column displays the name of the person to which the repeating payment profile is associated.
- **Frequency** – This column displays how often to process the repeating payment profile. The payment gateway provider determines frequency options.
- **Date Setup** – This column displays the creation date of the repeating payment profile.
- **First Payment** – This column displays the first payment date of the repeating payment profile.
- **Number Payments** – This column displays the total number of payments for the repeating payment profile.
- **Method**- This column displays the payment method for the repeating payment profile.
- **Status**- This column displays if the repeating payment profile is active or inactive.
- **Amount**- This column displays the amount for each payment.

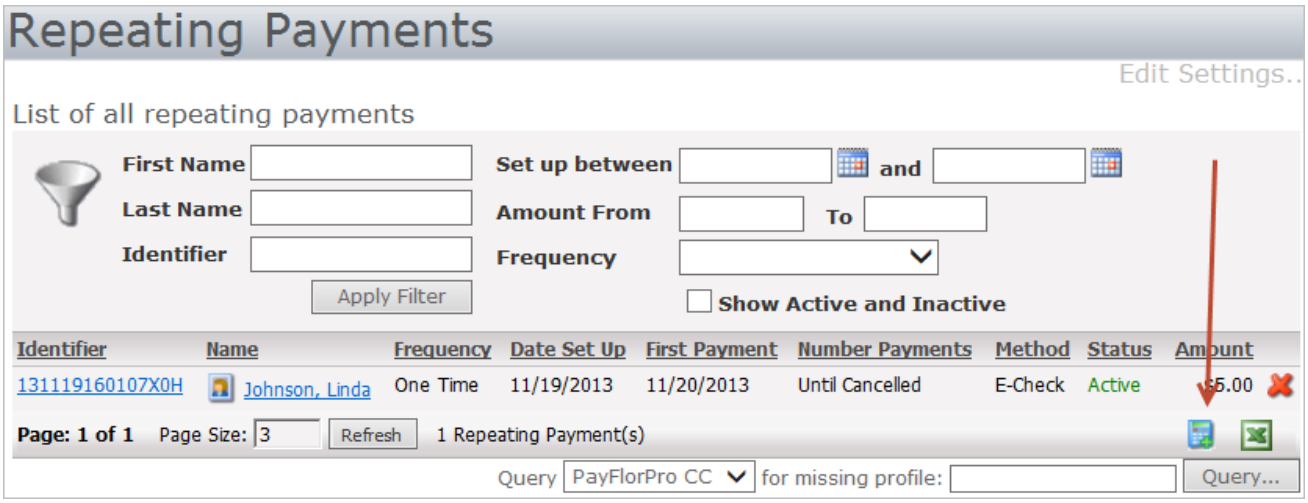
You can filter based on the Repeating Payment Identifier, a date range in which the payment schedule was setup, an amount range, the Frequency, the contributor, and/or the Repeating Payment Profile's Active status. You can also click the ***Name*** link to bring up their **Person Detail** page, or you can click a transaction **Identifier** number to bring up the details of that transaction. When you enter or process a payment, Arena can send an email to the Contributors.



Add a Repeating Payment

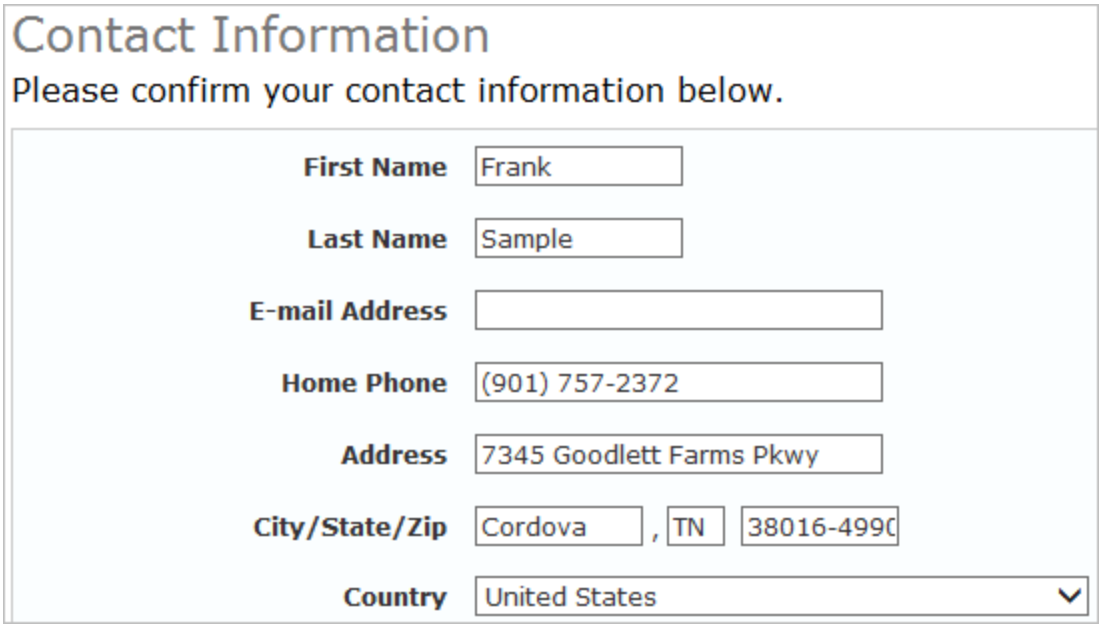
Permissions may vary by user and actual steps may vary by payment gateway provider.

1. On the **Repeating Payment** page, click the **Add Repeating Payment** icon.



2. Search and select for an existing record.

3. Confirm the Contact Information.



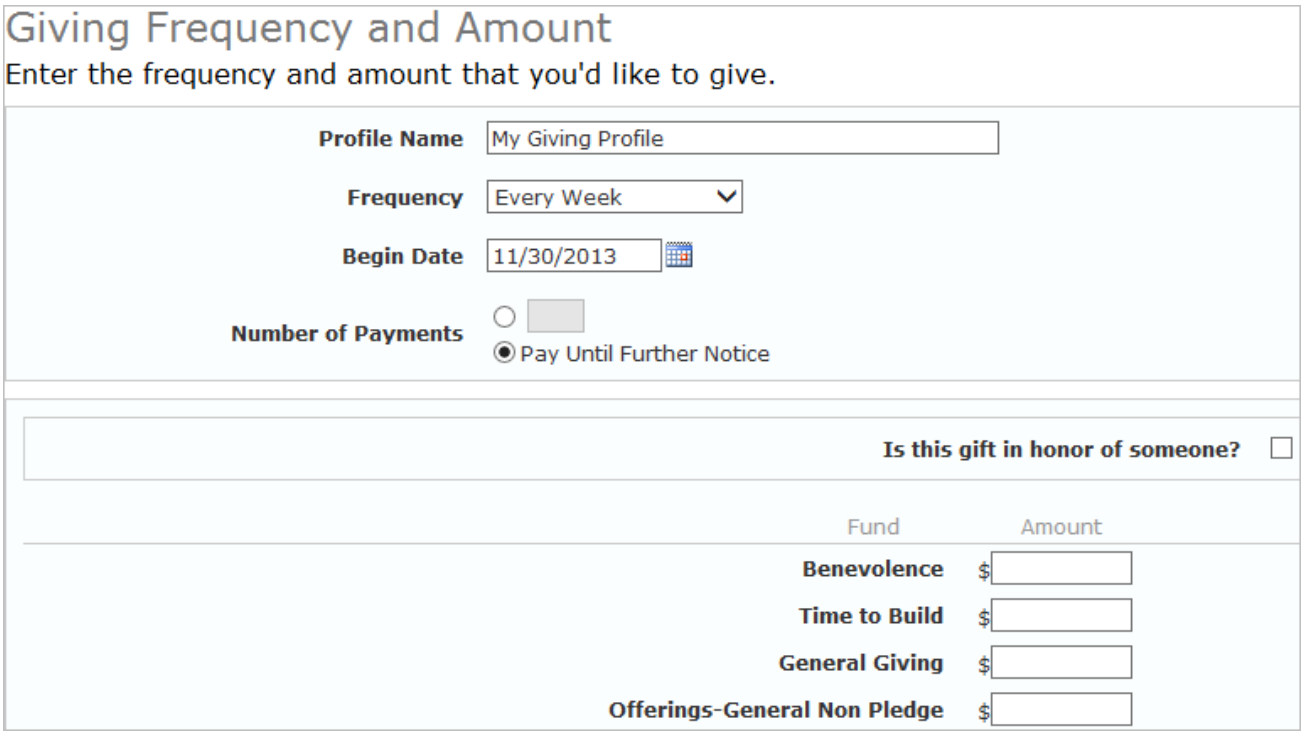
4. Click the **Next** button.

5. Enter a **Profile Name**.

6. Select **Frequency**. The payment gateway provider determines frequency options.

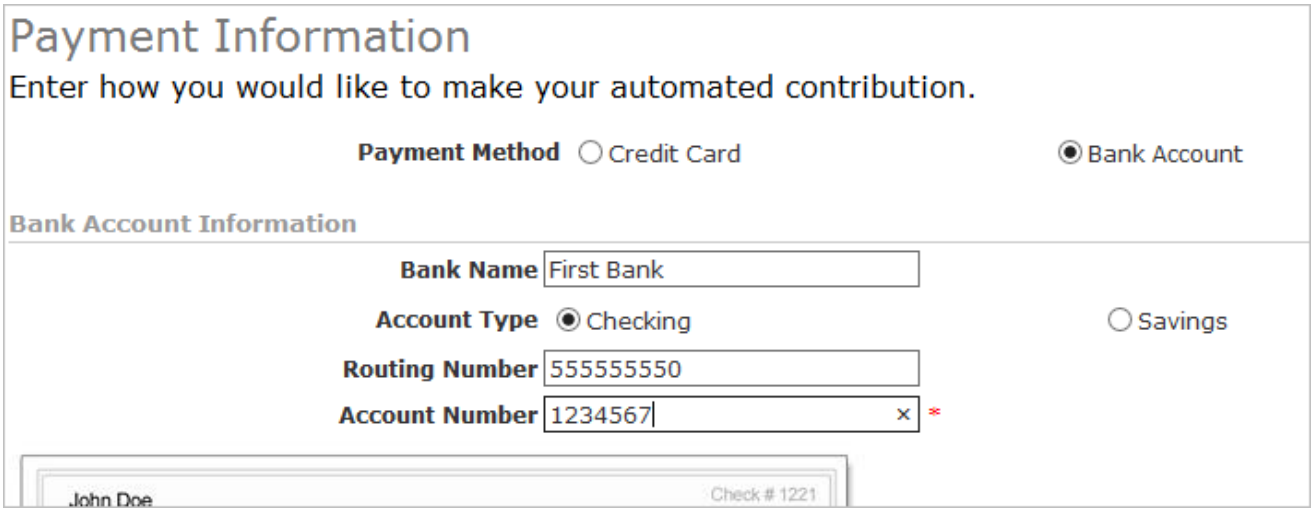
7. Enter or select **Begin Date**.

8. Enter amount(s) for each fund.

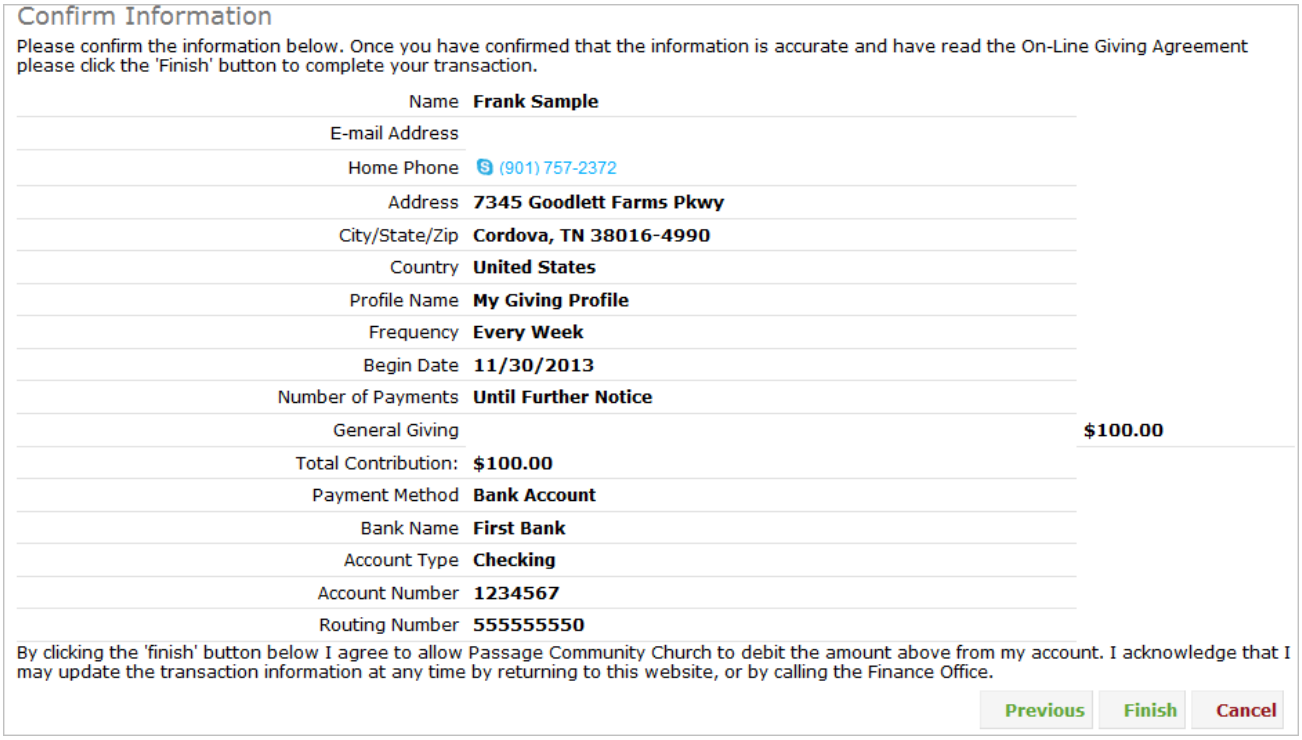


9. Click the **Next** button.

10. Select payment method.



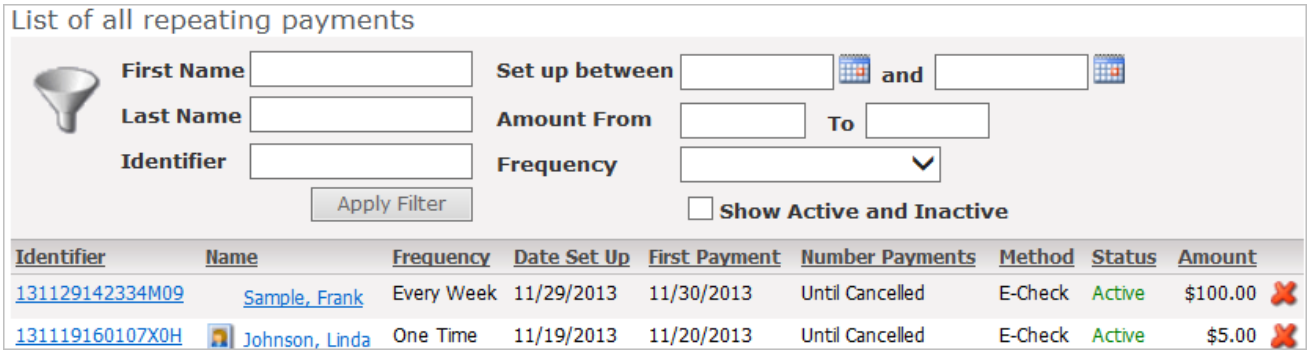
11. Click the **Next** button and complete the required payment information.



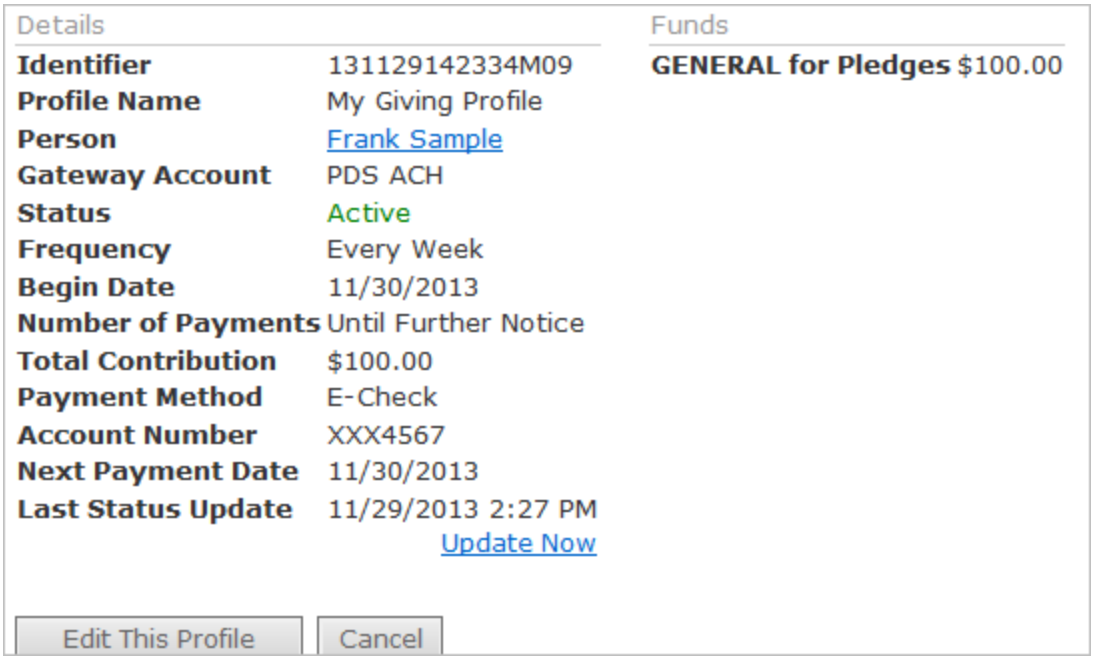
12. Arena displays a confirmation page and number.

Edit a Repeating Payment

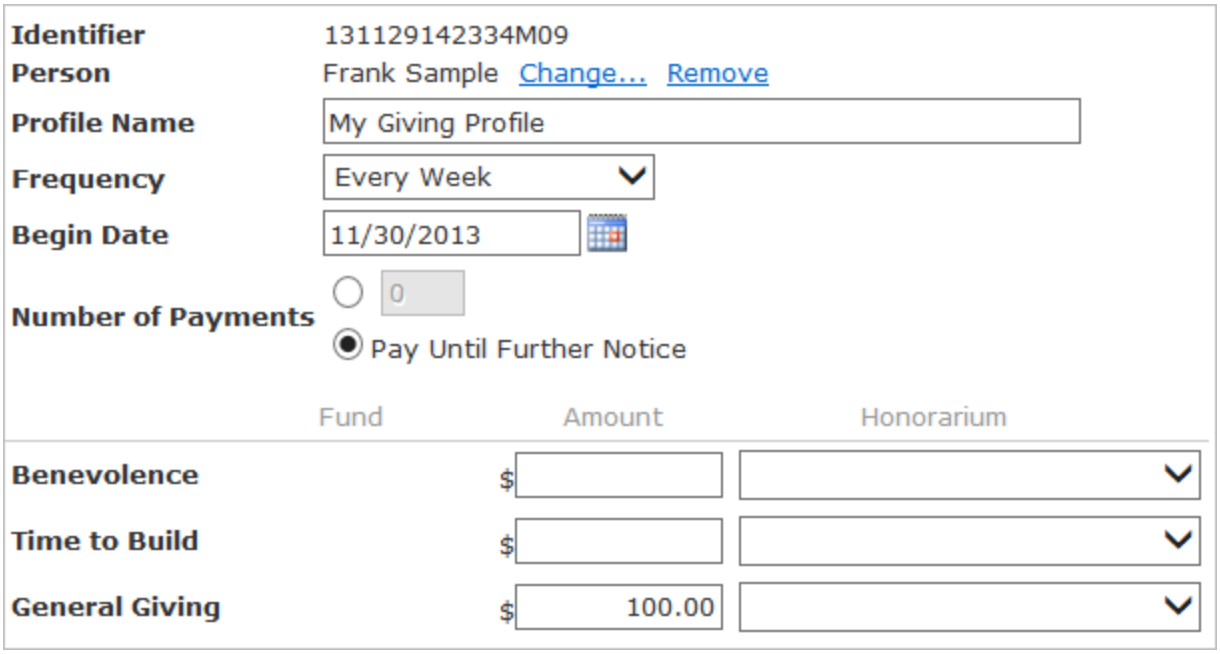
1. Click the ***Identifier*** link to pull up the details of the repeating payment.



2. Click the **Edit this Profile** button.



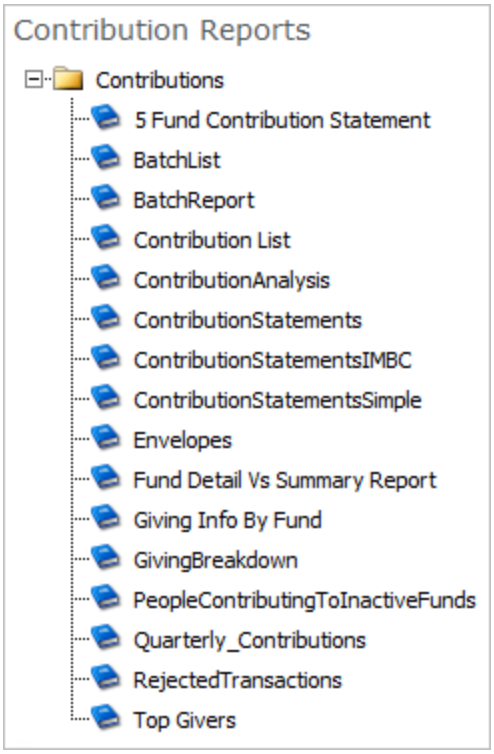
3. Make changes.



4. Click the **Save** button.

Reports

Prebuilt reports enable you to run reports such as, printed Contributions Statements and Batch Reports. Reports are available via Arena Hub. Below are the available Hub reports. Refer to your Arena Administrator for additional information.



Print Contributions Statements Example

Below is an example of printing contribution statements using the Five Fund Statement format.

1. Download the Contribution Statements Five Funds report from the Arena Hub.
2. Customize the report to have your funds as default settings. Also to add logos or change the legal disclaimer.
3. Manage Membership for statements:
   i. Have a tag for those members who wish to receive a printed statement no matter what.
   ii. Run a list to bulk update all children to contribute individually
   iii. Run a basic list to set all people with an email address to Email Statement: TRUE, Print Statement: False, And to set the PIN Using Bulk update (If you want to email statements)
   iv. Run an advanced list to set all people with no email address or who are in the print statement tag to Print Statement: TRUE, Email Statement: False
4. Print Statements:

i. Go to Contribution > Reports

ii. Click on Contribution Statement Five Funds Report

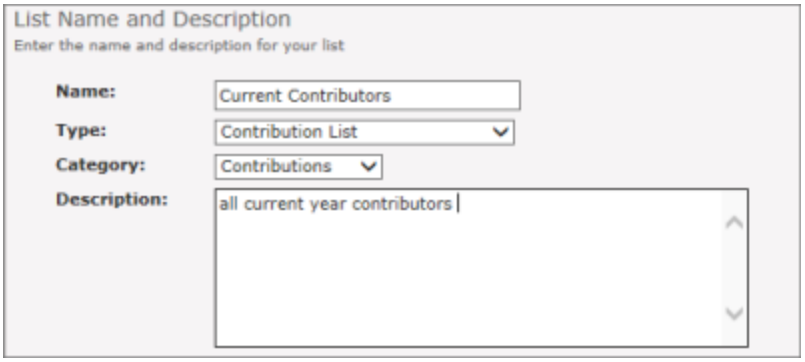
iii. Change any settings needed (include pledge without giving, no address on file, etc.)

iv. Leave the Null box marked to run for all people whoa re marked print statement true and have the minimum total giving needed.

5. (Optional) See Email Statements.

My and Public Contribution Lists

Use Contribution Lists to run lists specific to Contributions. The steps to create lists are the same as My and Public Lists. The only exception is the List Type is set to Contributions.

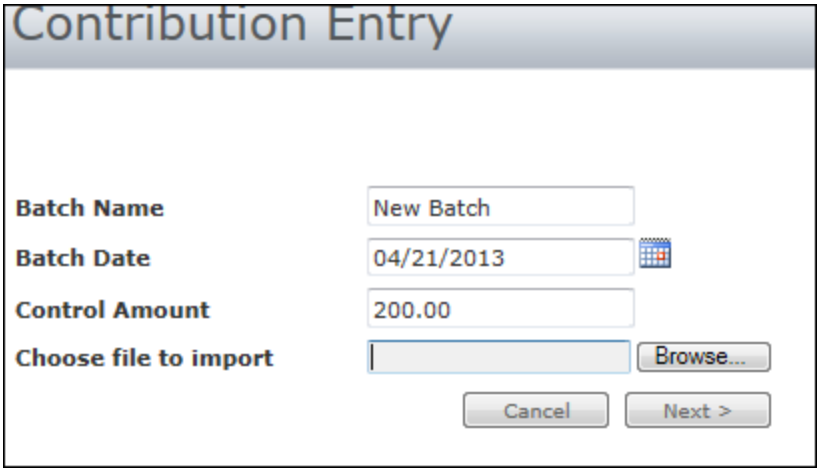


Contribution Entry

On this page, you can start a manual batch or import a ShelbyTELLER batch.

Create a Manual Batch

1. From the **Contributions** menu, click the **Contributions Entry** option.



2. Enter a **Batch Name**, **Batch Date**, and **Control Amount**. You can also import an xml format file such as Shelby Teller.

3. Click the **Next** button.

4. Click the **Search** icon to search and select by name, address, postal code, envelope number or phone number. Arena adjusts the default search option based on the last choice used by user. Enter at least one letter for first and last name if searching by name. Click the **Add New Person** button to add a new record.

Search Options

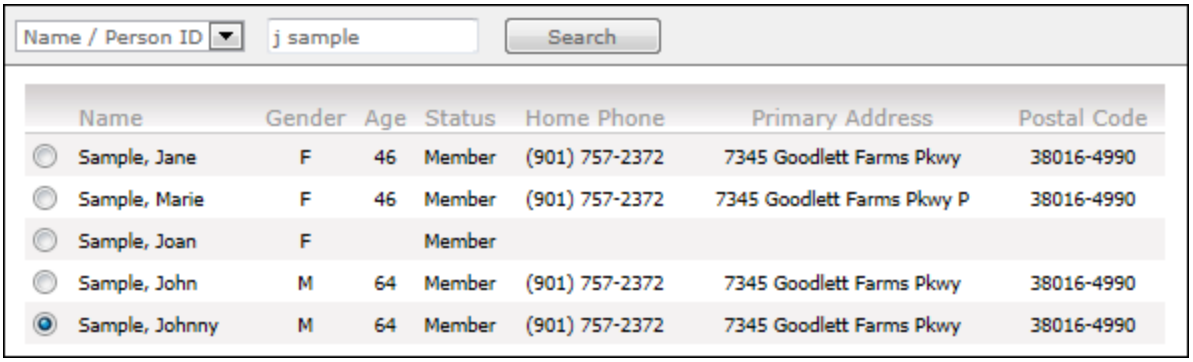
- **Name/Person ID** – Use this option to search using any part of the first or nickname and at least the first letter of the last name.
- **Address** – Use this option to search using any part of an address.

- **Postal Code** – Use this option to search using any part of the zip code.
- **Envelope Number** – Use this option to search using any part of the zip code.
- **Phone Number** – Use this option to search using any part of a phone number.

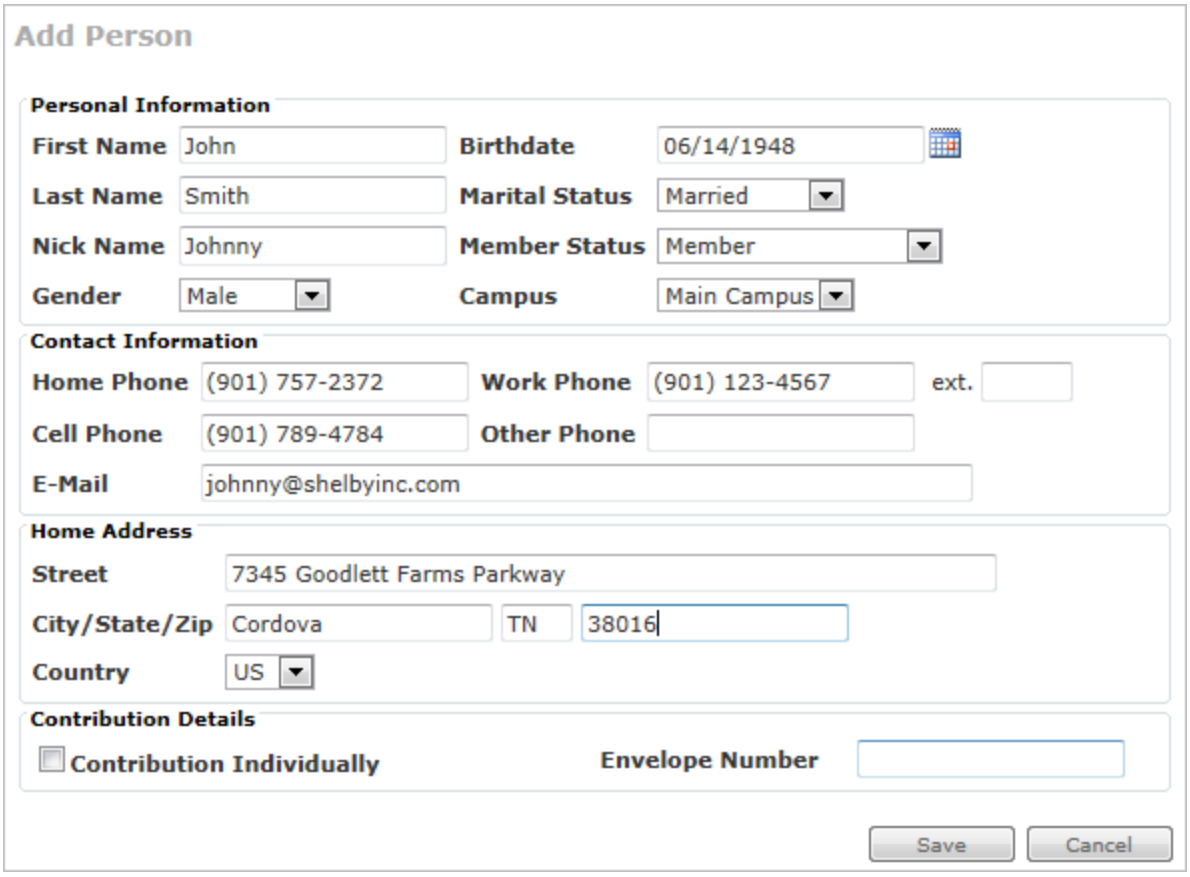
You can use the % or _ wildcards with all search options.

Select the radio button to the left of the desired record.

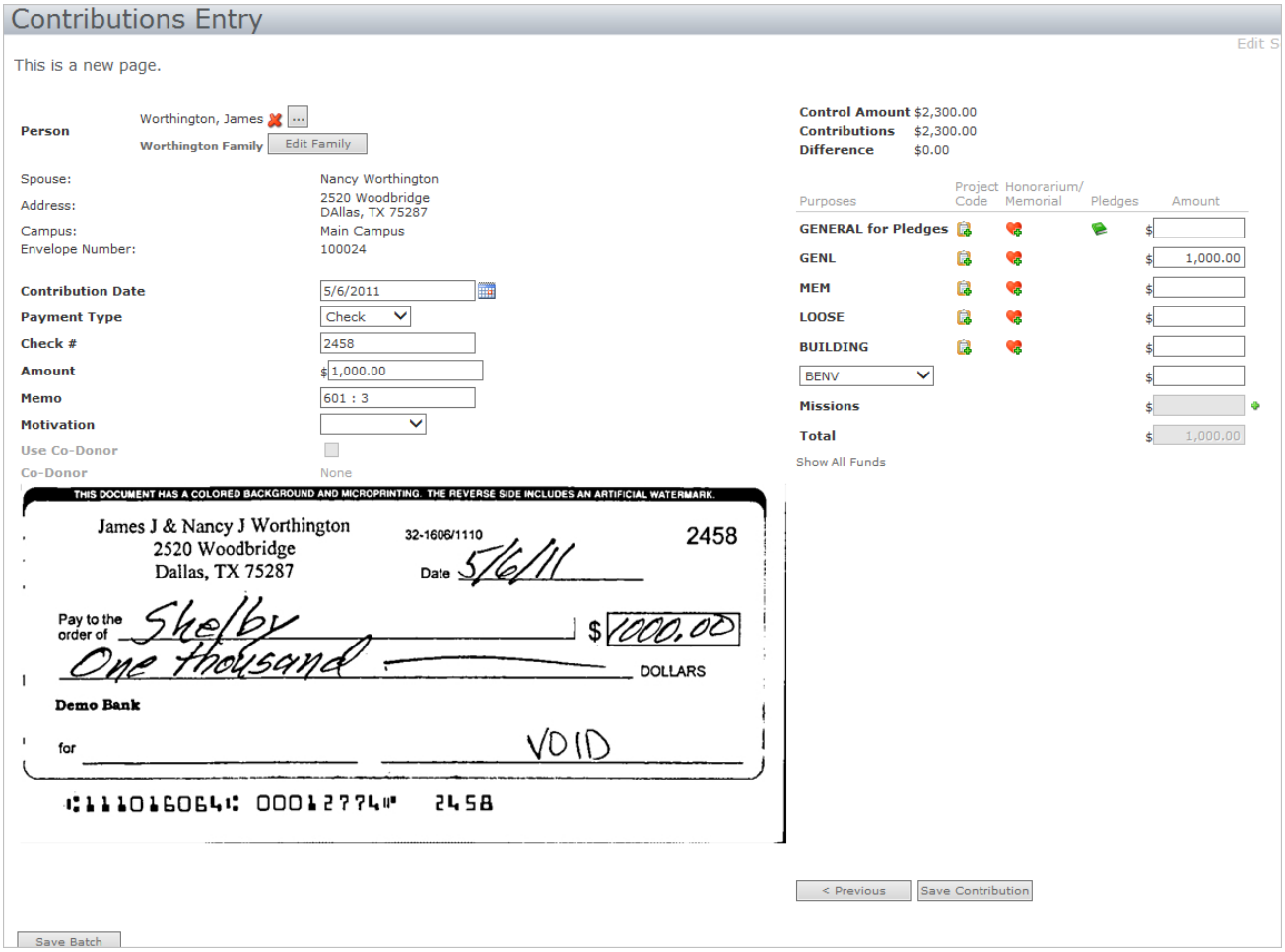
5. Click the **OK** button.



Add New Person Option



1. Enter all information for this contributor. Press the "Tab" key or the "+" key on a 10-key pad to move to the next field.



- **Search** icon – Use this icon to search and select an existing record. Optionally you can click the **Add New Person** button to enter a new record. Once you select or enter a record, the **Edit Family** button displays. Click the **Edit Family** button to open the Edit Family Wizard window. Changes made update all existing records. If changes are not necessary, press the "Tab" key on your keyboard to move to the next field. Once you select or enter a person, Arena displays the spouse if applicable, Campus if applicable and envelope number if applicable.

- **Contribution Date** – The default date is the same as the batch date. To change the date, enter the date in **MMDDYY** or **MMDDYYYY** format or click the **Calendar** icon to select the date.

- **Payment Type** – Use the drop-down list to select payment type. Default payment types are cash, check, e-check and non-cash. All contributions are credited to Funds that allow pledges. Press the "Tab" key to move to the next field.

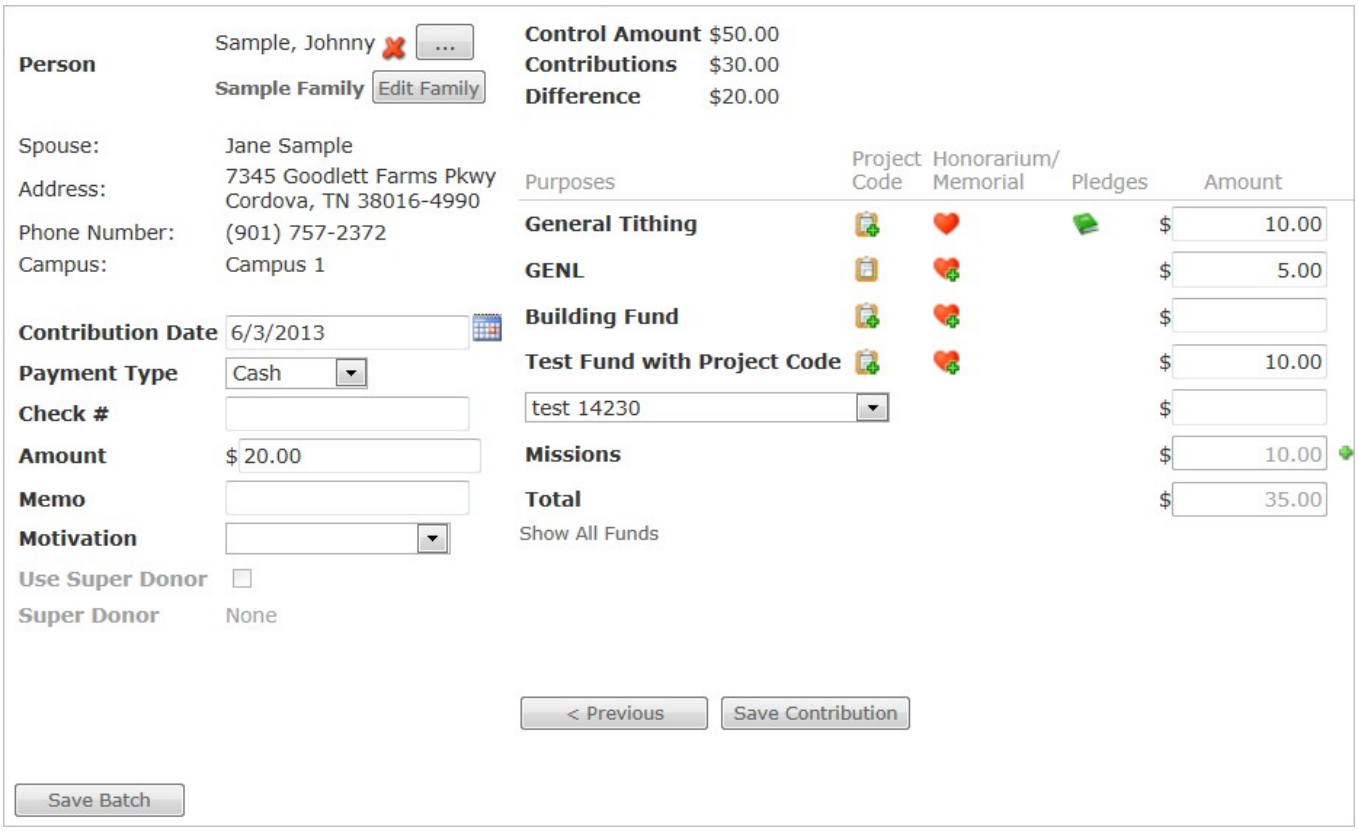
- **Check #** - Use this field to enter a check number. Press the "Tab" key to move to the next field.

- **Amount** – Enter the contribution amount. Amounts must be greater than $.01. Press the "Tab" key to move to the next field. The amount posts to the first Purpose (Fund). Press

the "Tab" key to move to the next field.

- **Memo** – Use this field to enter a memo for the contributions. Press the "Tab" key to move to the next field.
- **Motivation** – This optional drop-down is a customizable list of contribution motivations. Press the "Tab" key to move to the next field.
- **Sub-Donor** – Use this option to associate the contribution with the sub- donor to the contributor. You can assign a Sub-Donor on the **Person Detail** page.

2. Enter the contribution information.



- **Control Amount** – This is the control amount for the batch.
- **Contributions** – This is the amount of the current contribution.
- **Difference** – This is the difference between the current contribution entry and the batch control amount.
- **Purposes column** – Arena displays priority funds. Use the purpose drop-down box to select a non-priority fund. Funds display alphabetically by Category and then alphabetically by fund.
- **Project Code column** – Click the **Add Project** icon to select a project code. The **Project Code** icon displays once you associate the contribution with a project code.
- **Honorarium/Memorial column** – Click the **Add Honorarium** icon to associate the contribution with an existing honorarium. Once you associate the contribution with an

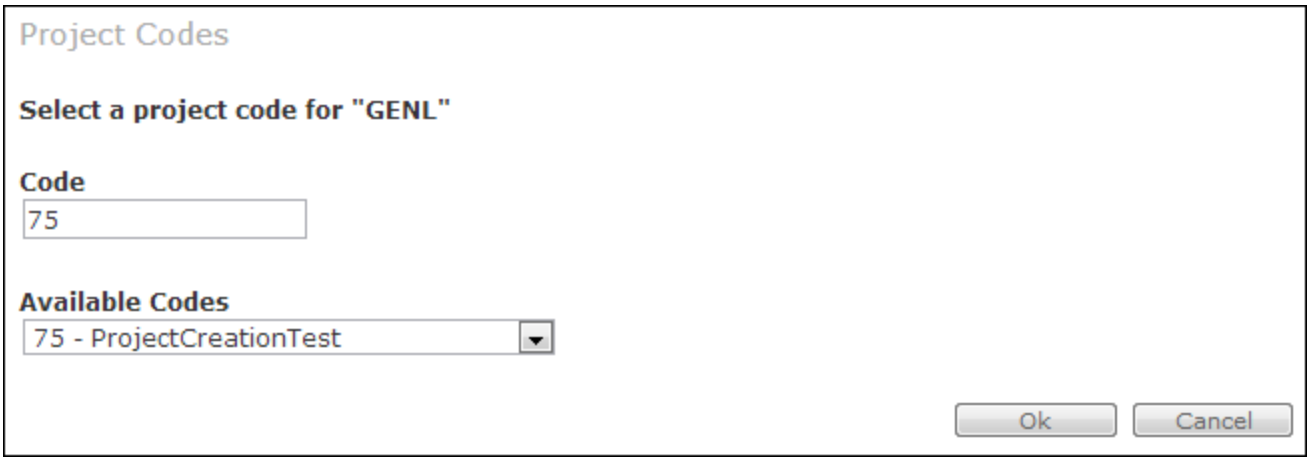
honorarium, the **Honorarium** icon displays. See your Arena Administrator if this column is not available.

- **Pledges column** – The **Pledge** icon displays if the contributor has an existing pledge for a fund. Hover over the **Pledge** icon to display pledge details for the fund. See your Arena Administrator if this column is not available.

- **Amount** Column – The amount you enter auto-fills to the first fund. Press the "Tab" and "Delete" keys to move to a different fund.

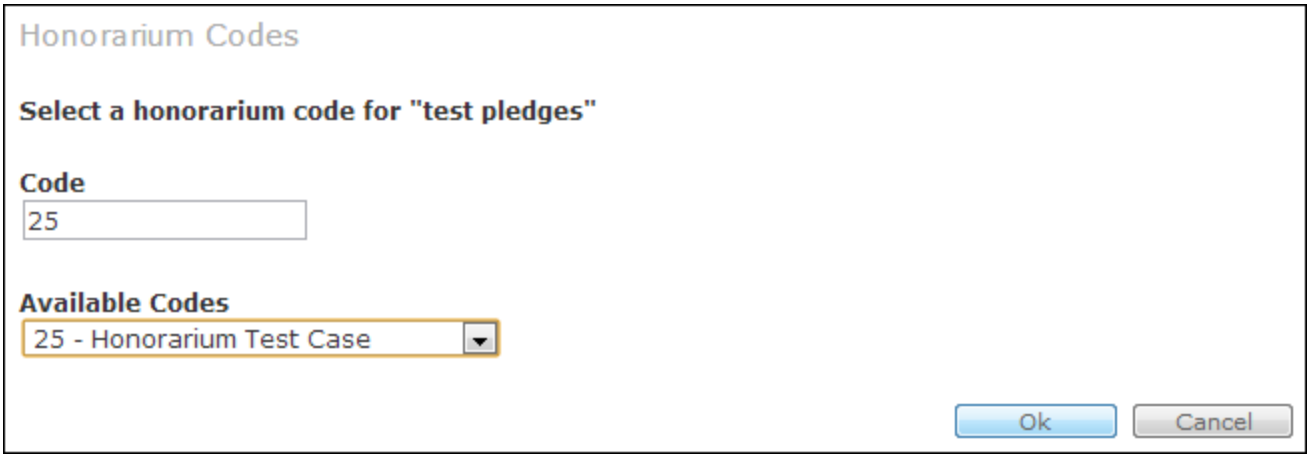
Applying a contribution to a Project Code

1. Enter the amount for the **Purpose**.
2. Select the **Show All Funds** check box to display all active funds. Click the **Project Code** icon to select a Project Code. If you know the project code number, enter in the Code field.
3. Click the **OK** button to return to the **Contribution Entry** page.



Applying a contribution to a Honorarium/Memorial

1. Enter the amount for the **Purpose**.
2. Click the **Add Honorarium** icon to select an honorarium code.
3. Select the honorarium from the **Available Codes** drop-down. If you know the code, enter in the **Code** field.



4. Click the **Ok** button to return to the **Contribution Entry** page.

Viewing pledge details

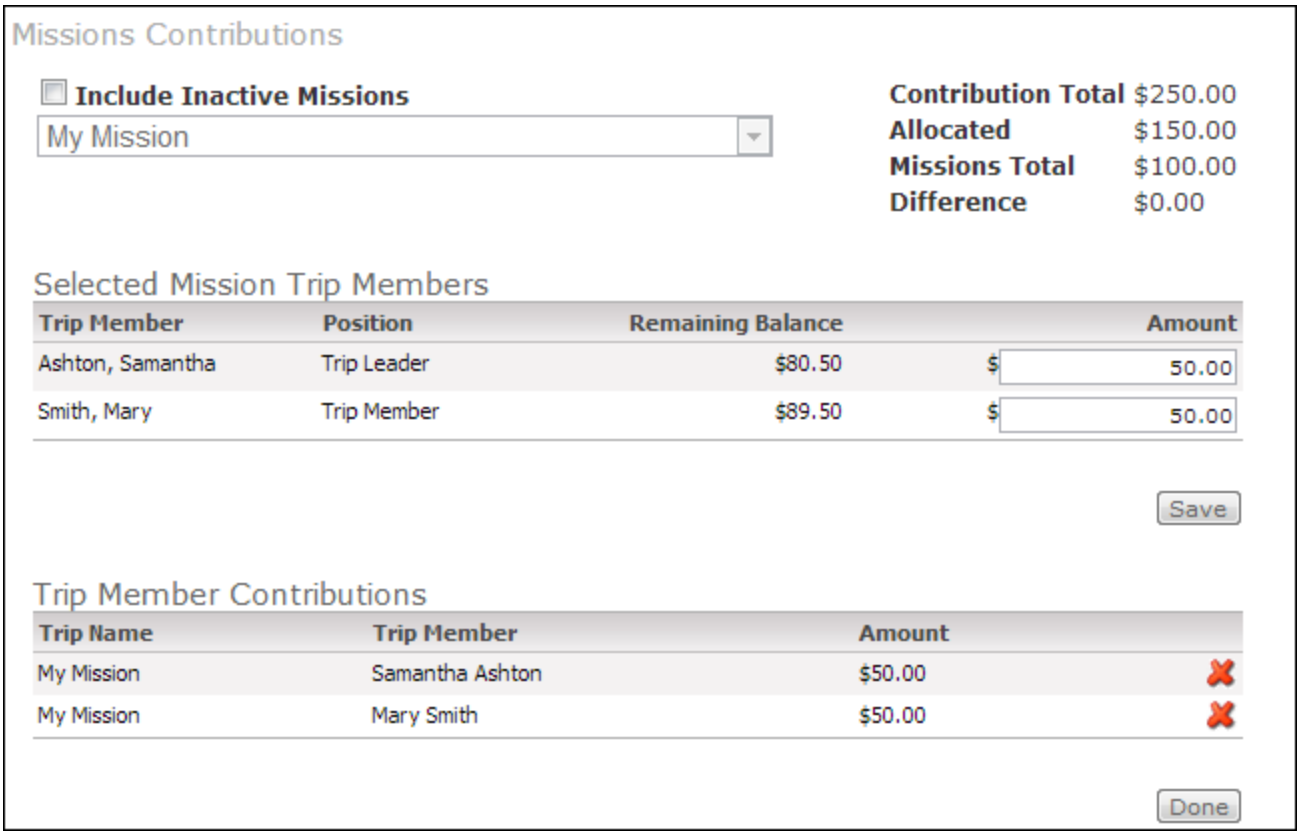
1. Click the **Pledge** icon to display pledge status.

2. Click the **Ok** button to return to the **Contribution Entry** page.

Applying a Contribution to a Mission Traveler

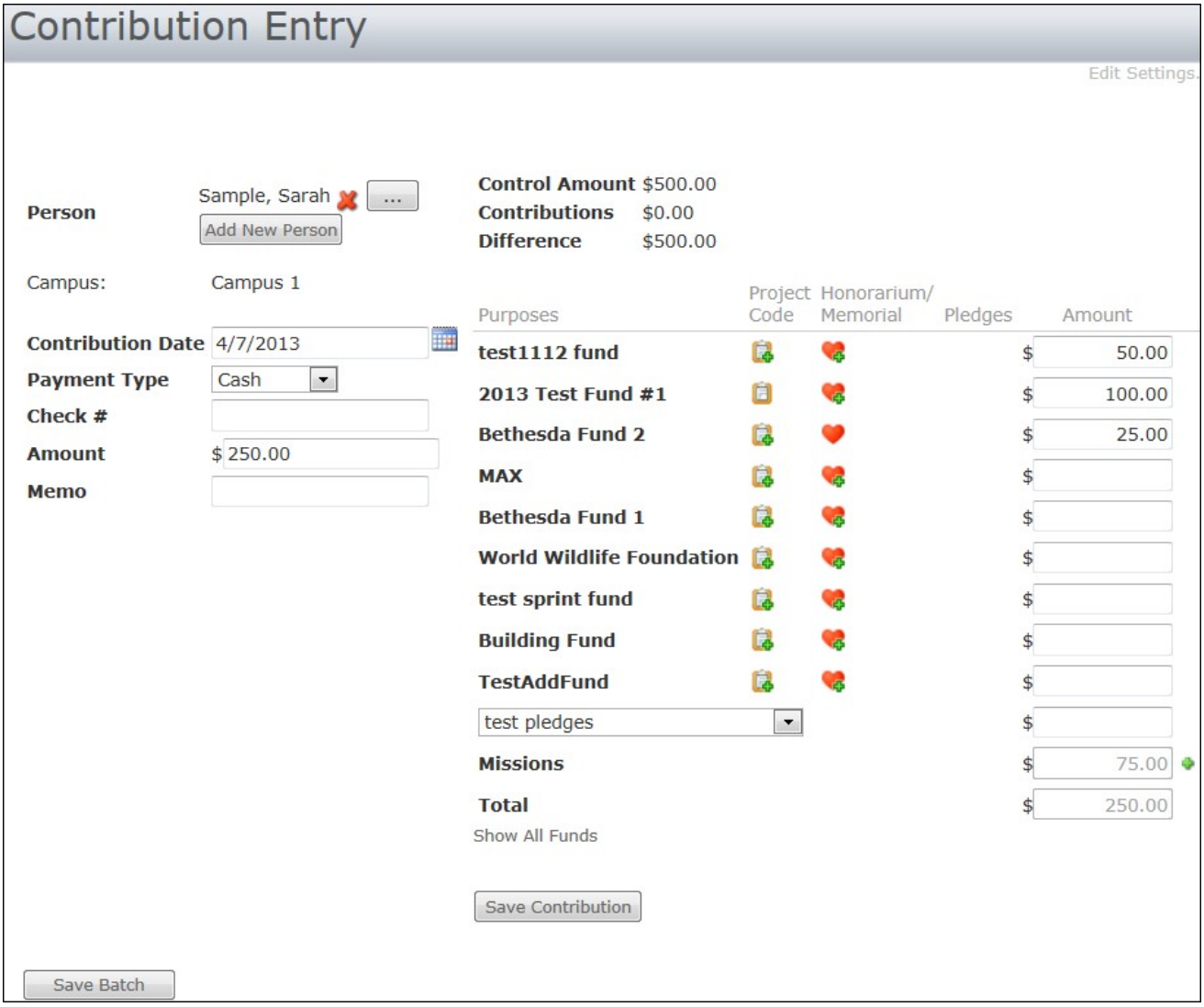
1. Click the **Mission Donor** icon to display all active mission trips.

2. Select the **Mission Trip** to display all travelers and enter the amount for the traveler. All Active Mission Trips display by default. Select the **Include Inactive Missions** check box to display inactive mission trips.



3. Click the **Save** button then the **Done** button.

4. Click the **Save Contribution** button.



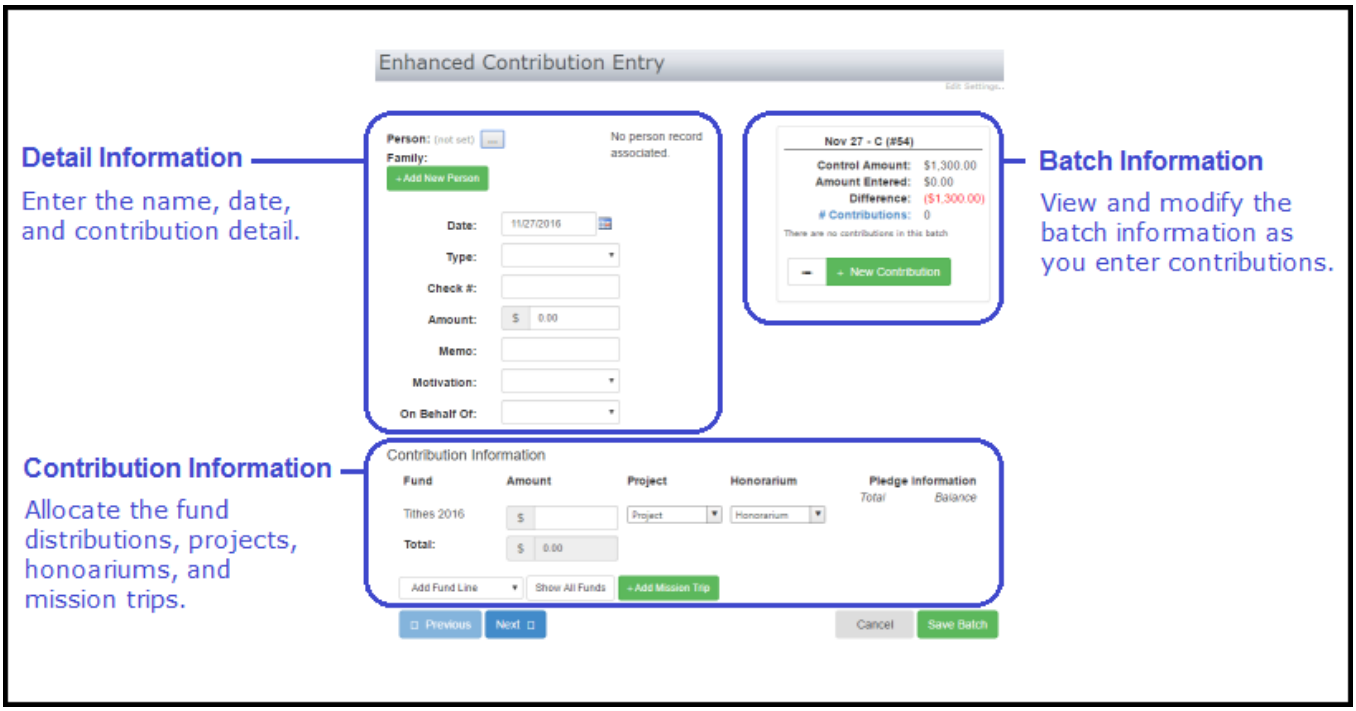
5. Click the **Save Batch** button when all entries are complete.

6. Click the ***Contribution Detail*** link to edit the contribution.

7. Click the **Delete** ✘ icon to delete a contribution.

Enhanced Contribution Entry

The Enhanced Contribution Entry page allows you to enter contributions in an enhanced user-interface where you can specify honorariums for each fund and give towards mission trips. (See the Using Sub-Donors section for steps to activate the Sub-Donor option.)

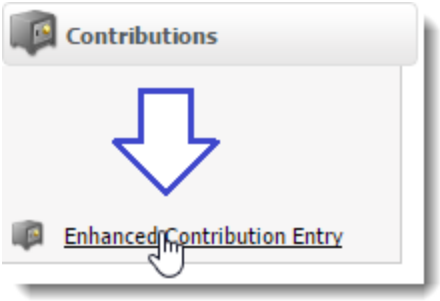


NOTE: The following access keys can be used to quickly navigate through the entry process.

- Alt-N - New Contribution
- Alt-S - Save Batch
- Alt-C - Access Fund List
- Alt-M - Access Missiions

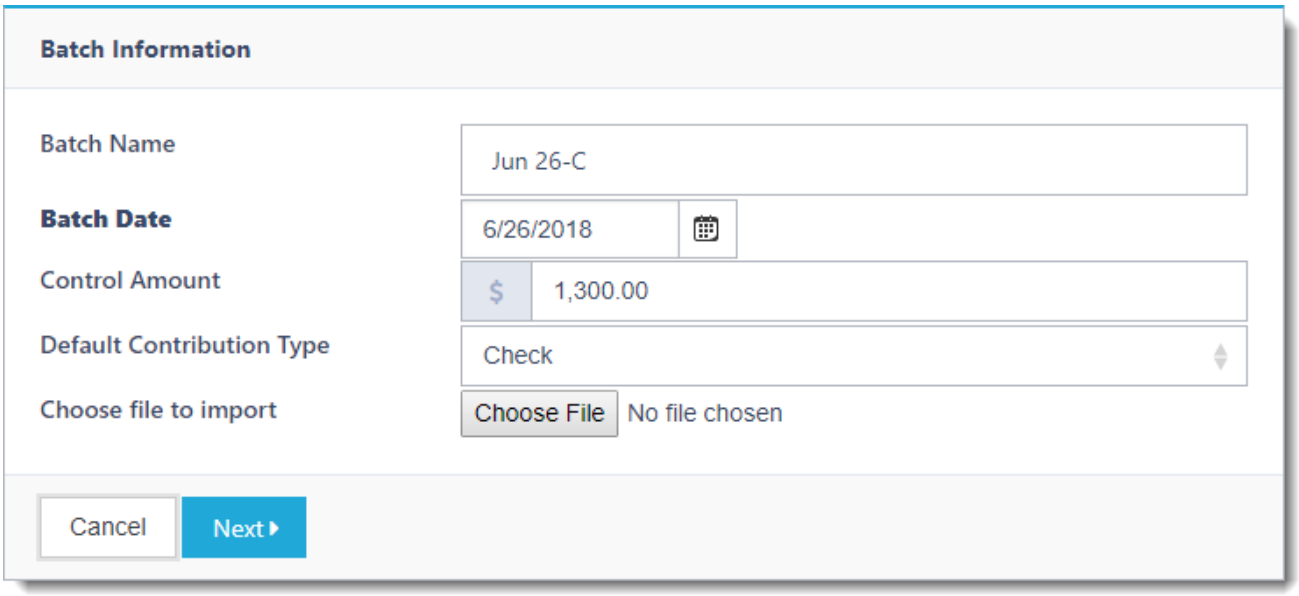
Follow the steps below to enter contributions using the Enhanced Contribution Entry page.

1. From the **Contributions** menu, select the **Enhanced Contribution Entry** option.

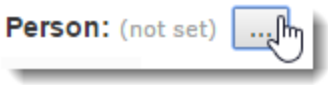


2. Enter the **Batch Name**, **Batch Date**, **Control Amount**, and choose the Default Contribution Type (e.g., Check, Cash, Non-Cash, E-Check). Then click the **Next** button.

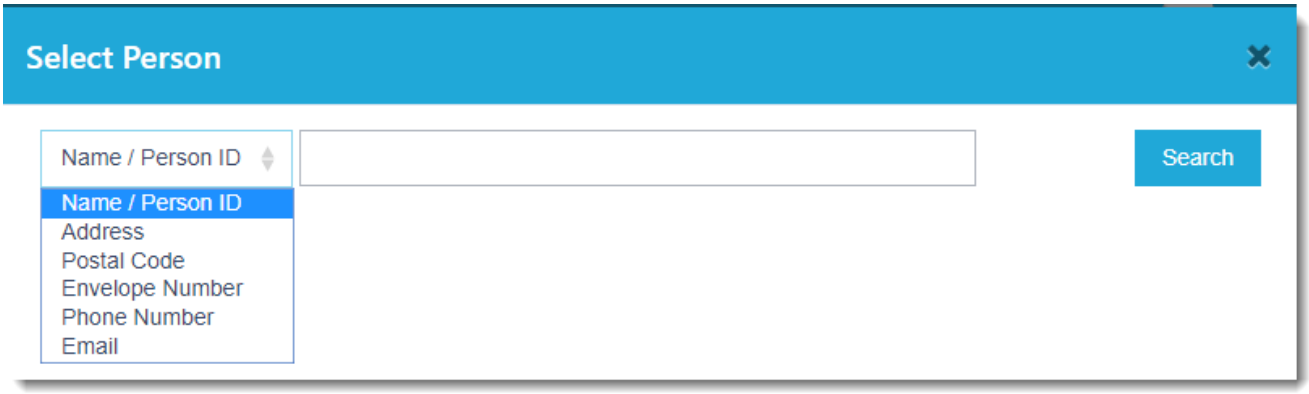
NOTE: If you have a ShelbyTeller file to import, click the **Choose File** button. All entries in the imported batch will be set to the selected Default Contribution Type selected.



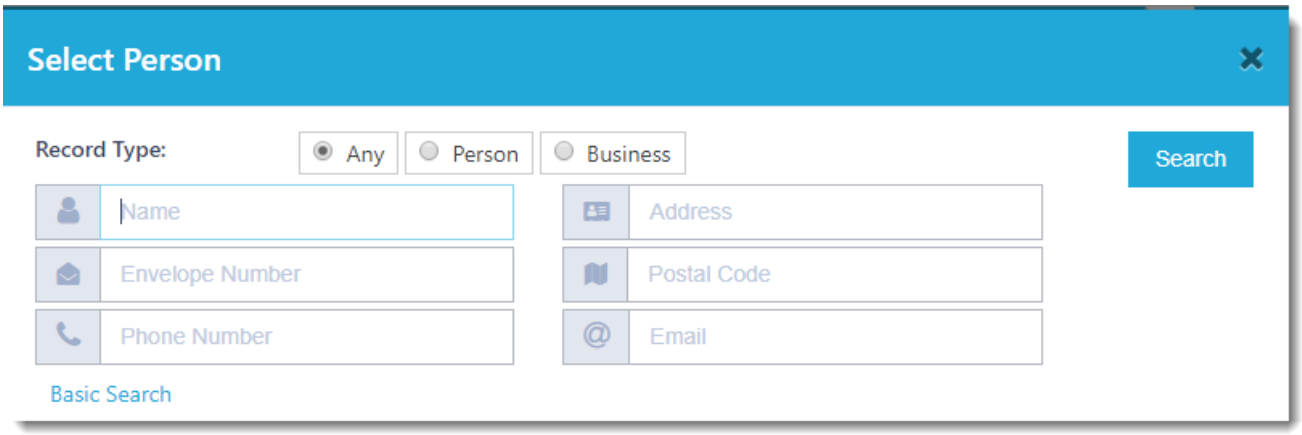
3. Select the individual by clicking the **Search** ... icon.



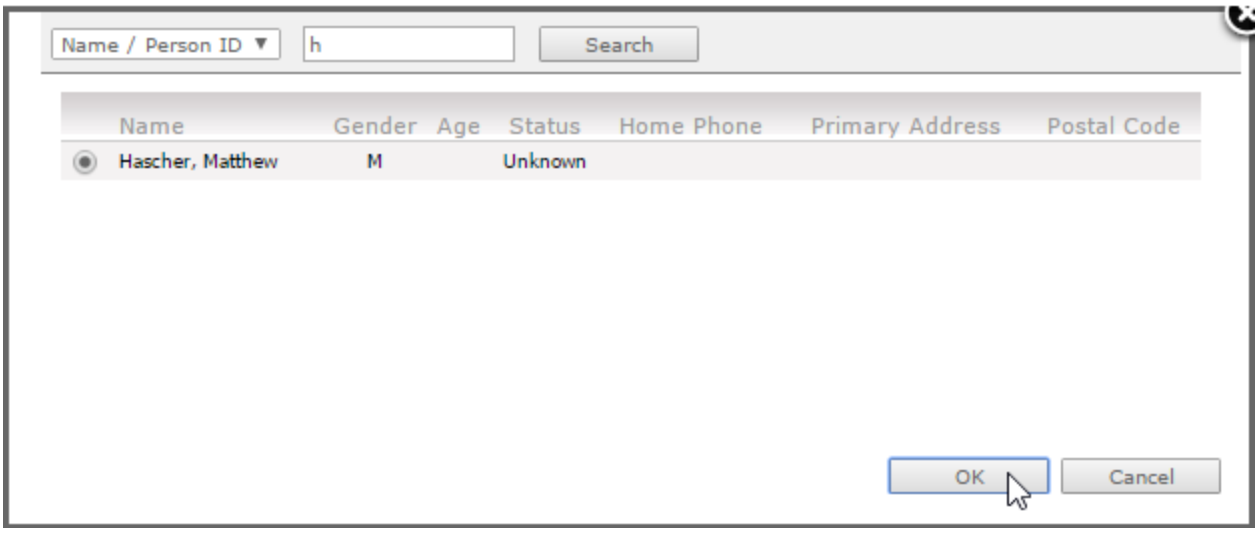
4. The **Person Search** window appears. Select a search criteria from the drop-down list.



Advanced Search: Includes the ability to search by multiple values as well as limit to Person or Business record type.



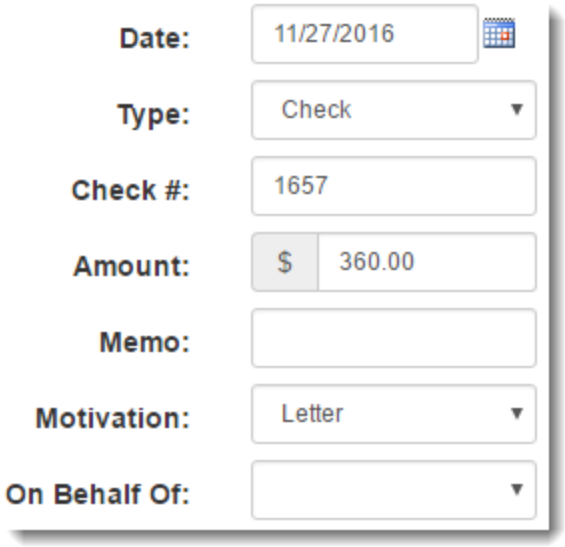
5. Enter your search criteria and then click the **Search** button. After the name(s) appear, select an individual and then click the **OK** button.



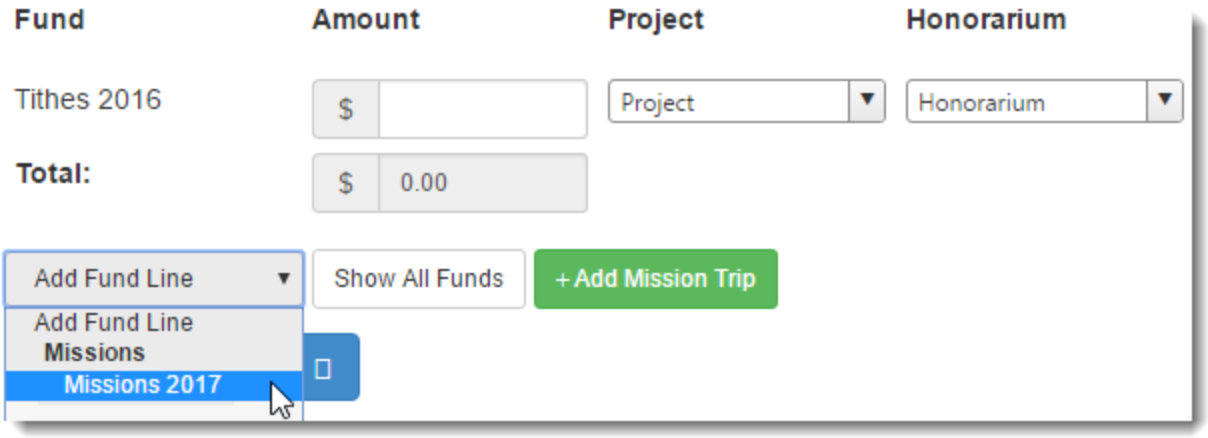
6. Enter the detail for the individual contribution. The Date field defaults to the date of the batch.

NOTE: The Memo field is useful for non-cash gifts where an individual has donated stocks,

equipment, or other items of value to the church.

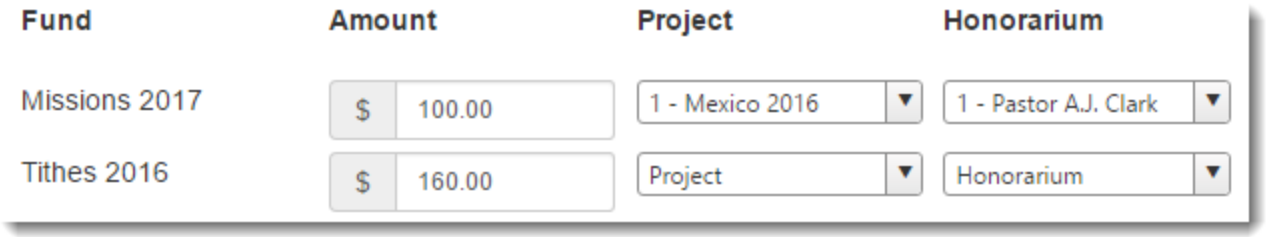


7. The **Contribution Information** section allows you to distribute the amount of this contribution to funds, projects, honorariums, and pledges.



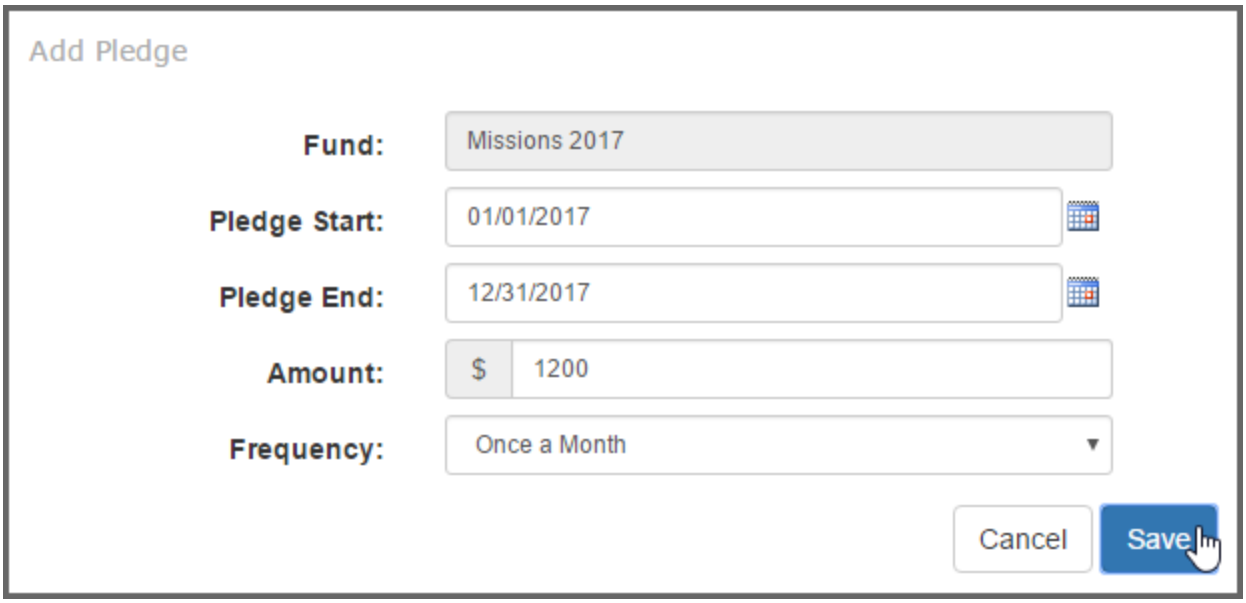
- Click on the **Add Fund Line** drop-down to select which funds to display or start typing to filter the funds to display.
- Click the **Show All funds** button to display all funds.

8. Enter the amounts for each fund and specify any projects or honorariums accordingly.

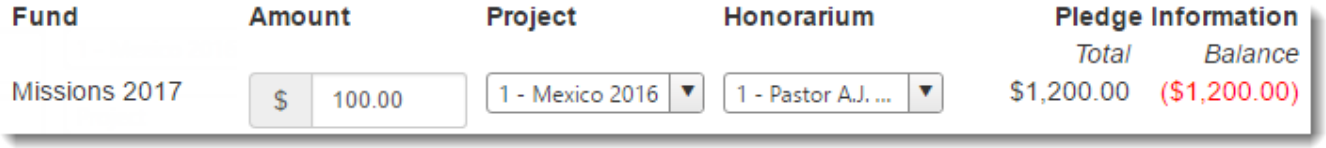


9. Click the **Add New** icon to add a new pledge.

10. The Add Pledge window appears. Enter the details of the pledge and then click the **Save** button.

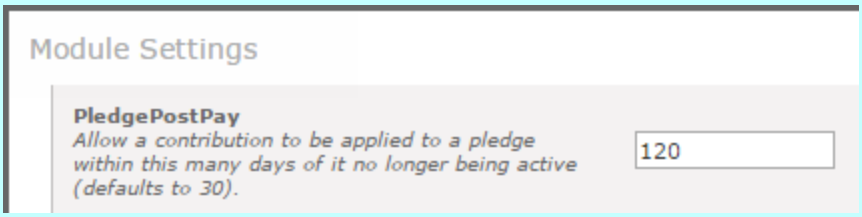


11. Notice the new pledge displays under the **Pledge Information** header.



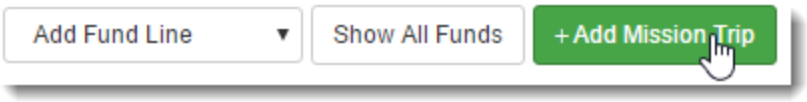
If the new pledge does not display, click the ***Edit Settings...*** link in the upper right-hand corner of the page and then adjust the **PledgePostPay** field.

For example, if you want pledges to display 120 days before the Start Date of the pledge, enter "120" in the field.

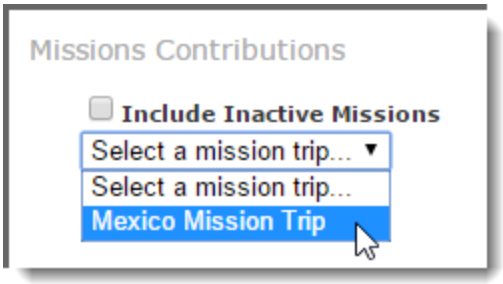


When you are finished adjusting the Module Settings, click the **Save** button, then the **Done** button. When the refresh cache message appears, click the **OK** button.

12. Click the **Add Mission Trip** button to allocate part of the contribution to a mission trip.

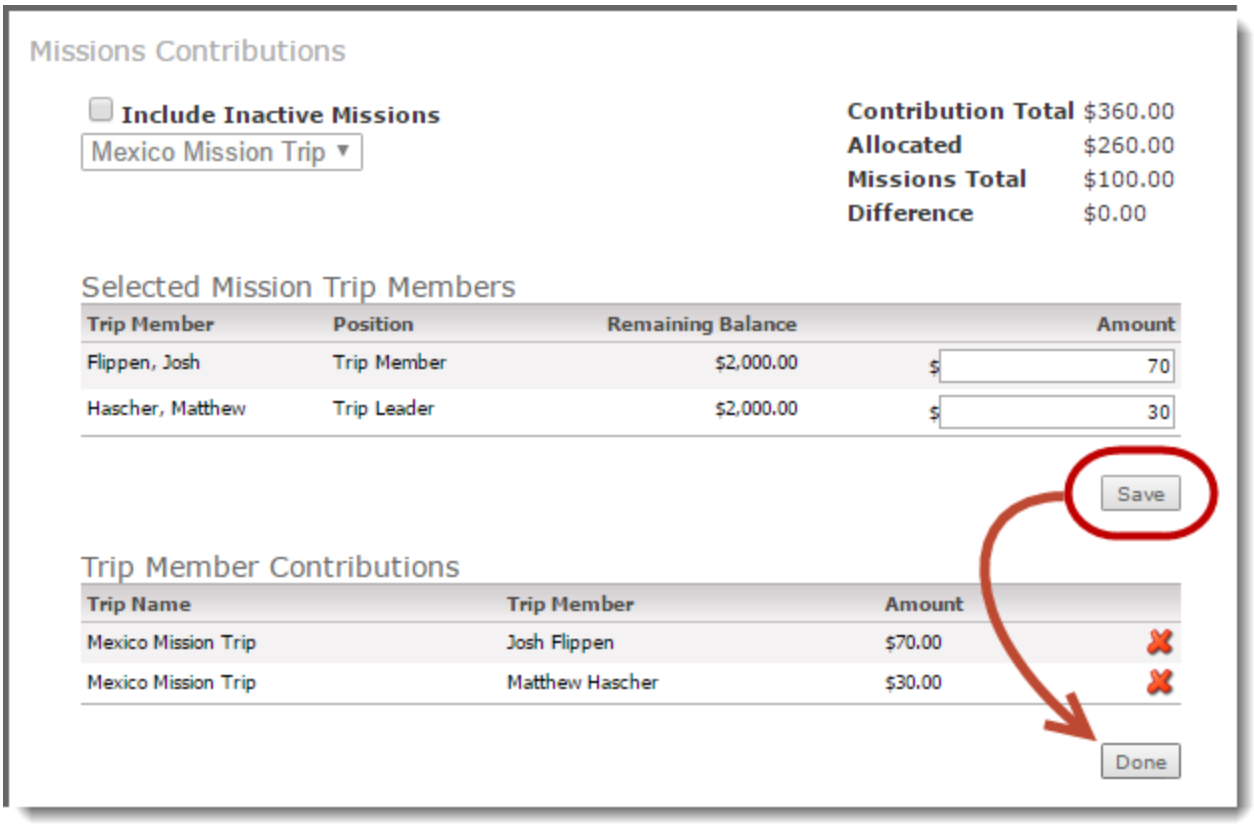


13. The **Missions Contributions** window appears. Select a missions trip from the drop-down listing.

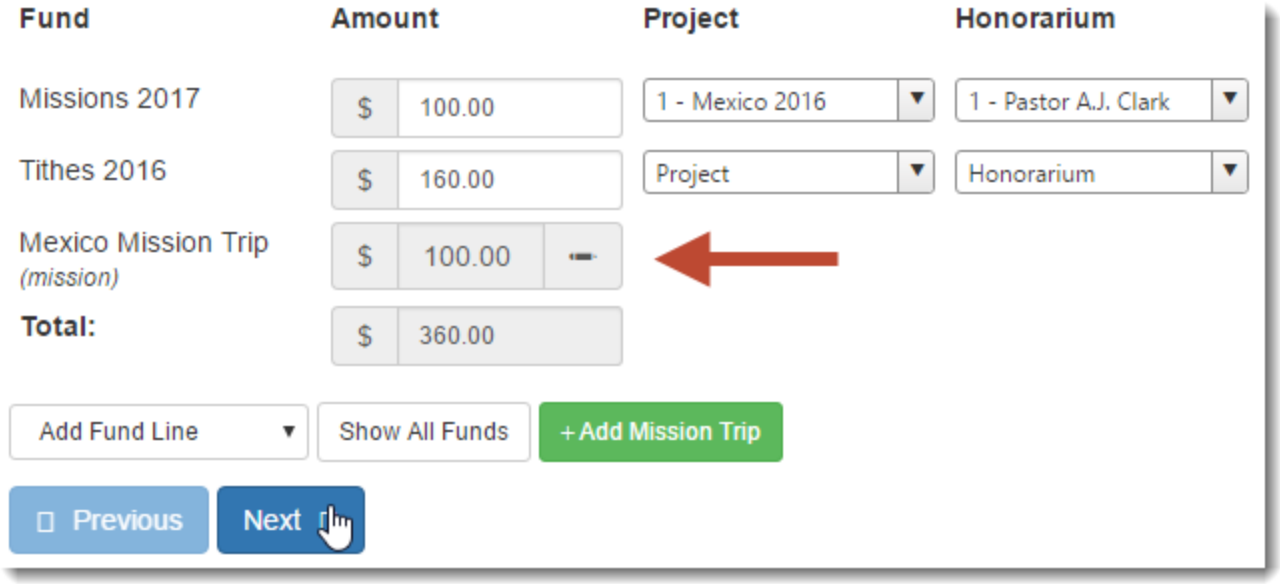


14. Enter an amount for at least one trip member and then click the **Save** button. Review the saved amounts in the Trip Member Contributions listing and then click the **Done** button when finished.

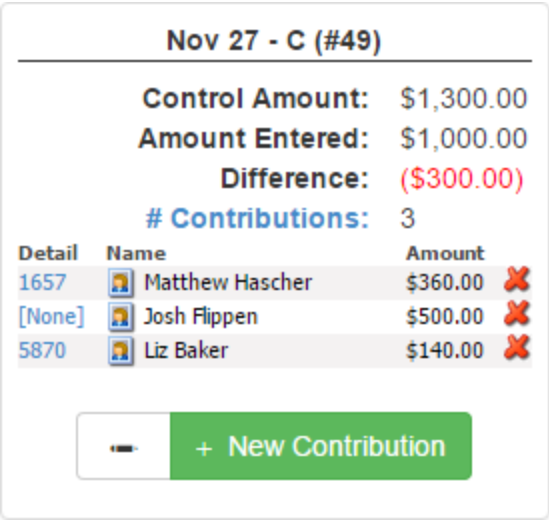
NOTE: Click the **Delete** ✘ icon to remove a trip member allocation.



15. After the Mission Trip allocation is added, you can click the **Edit** icon to view or change it. Review all the details for this contribution and then click the **Next** button to save the contribution.



16. As you enter contributions, notice the **Batch Information** box on the right-side of the page. This allows you to view and modify batch information as you enter contributions.

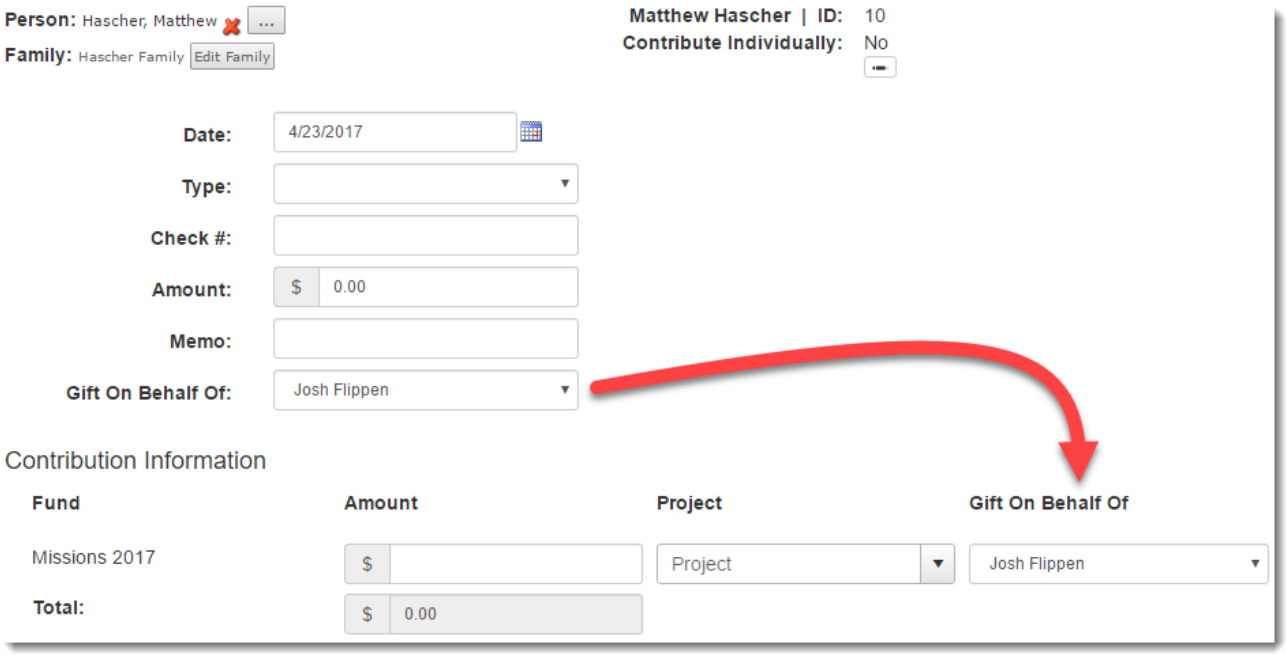


- The **Control Amount**, **Amount Entered**, and the **Difference** between the two is listed at the top.
- Click the ***# Contributions*** link to alternate between viewing and hiding the summary of entries.
- Click the link in the **Detail** column to view the contribution for that individual.
- Click the **Edit** icon to make changes to the Batch Name, Batch Date, or Control Amount.
- Click the **New Contribution** button to add a new contribution to the batch.
- Click the **Delete** icon to remove a contribution from the batch.

17. When you are finished entering all the contributions for this batch, click the **Save Batch** button.

Using SubDonors

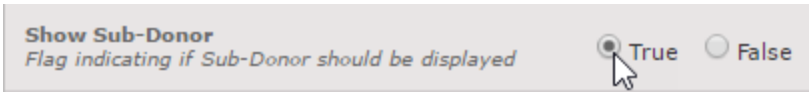
When using SubDonors, there is a drop-down list option labeled "Gift On Behalf Of" available when entering the contribution and the contribution details. The SubDonor selected in the Contribution Details is then tied to the Fund and Contributor.



To activate this feature, follow the steps below:

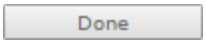
1. Click the **Edit Settings...** link in the upper right-hand corner.

2. Scroll down on the Module Settings window and then select "True" on the **Show Sub-Donor** option.

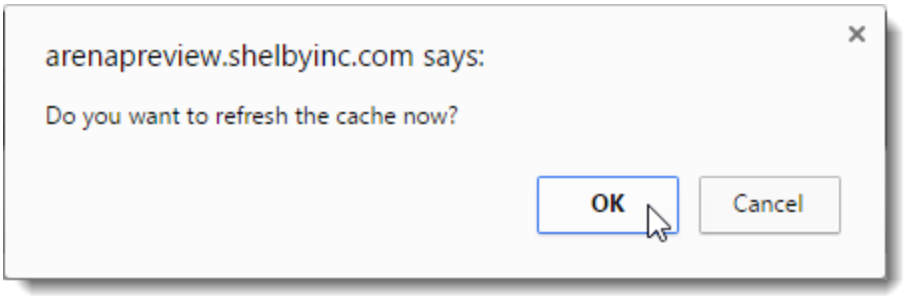


3. When you are finished making your selection, click the **Save** button at the bottom of the window.

4. Next, click the **Done** button.



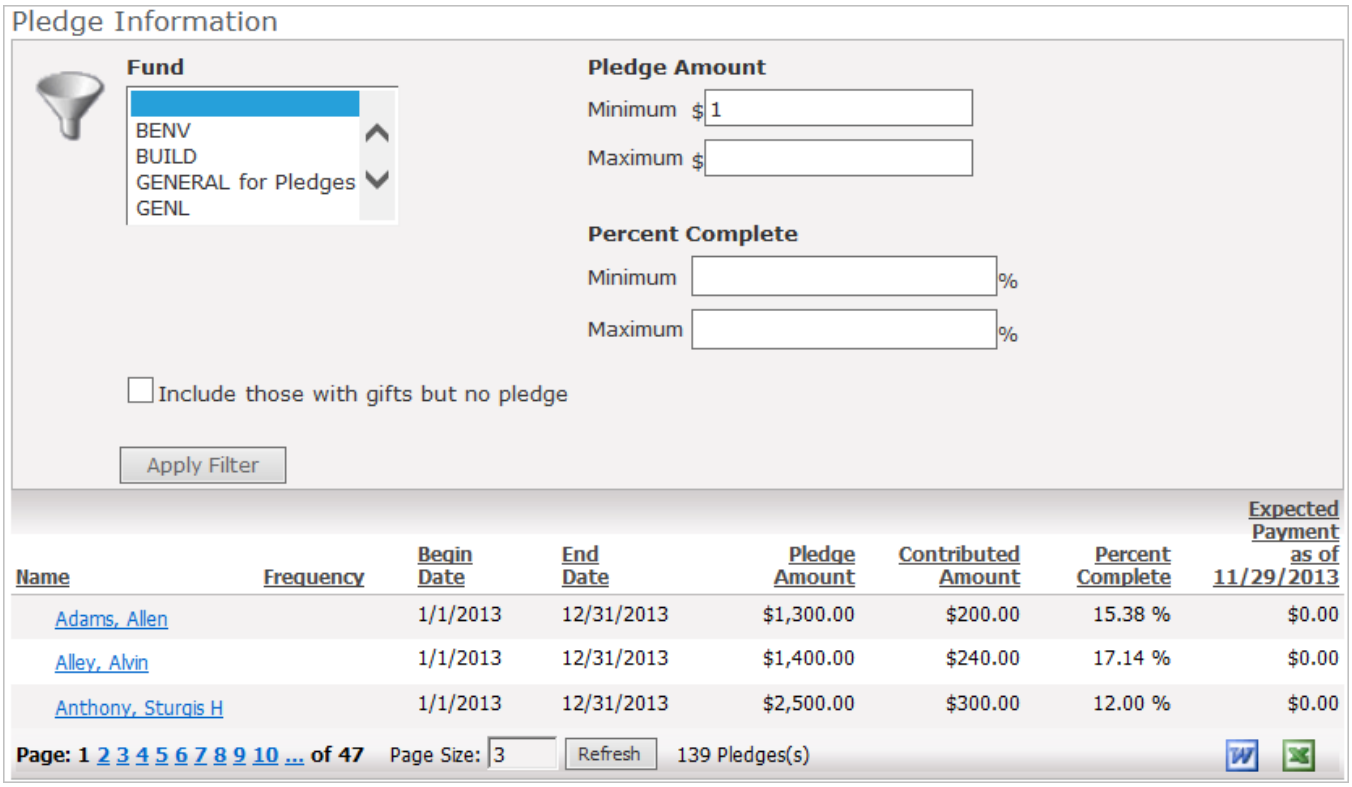
5. A pop-up message appears asking you to refresh cache. Click the **OK** button. The settings for your group details are now updated.



Pledges

Pledges allow you to view previously entered pledges based on the filter parameters. The filters allow you to search by Fund, Pledge Amount (Minimum and Maximum), and Percent Complete (Minimum and Maximum). Pledges listed on this page are based on the date range of the individual

pledge and the date range of the fund. For example, if member a member contributes before (10/15/2014) the date range of the fund (e.g., 1/1/2015-12/31/2015), the dates for the fund and pledge must be set to reflect the 'expanded' date range (e.g., 10/1/12014-12/31/2015).

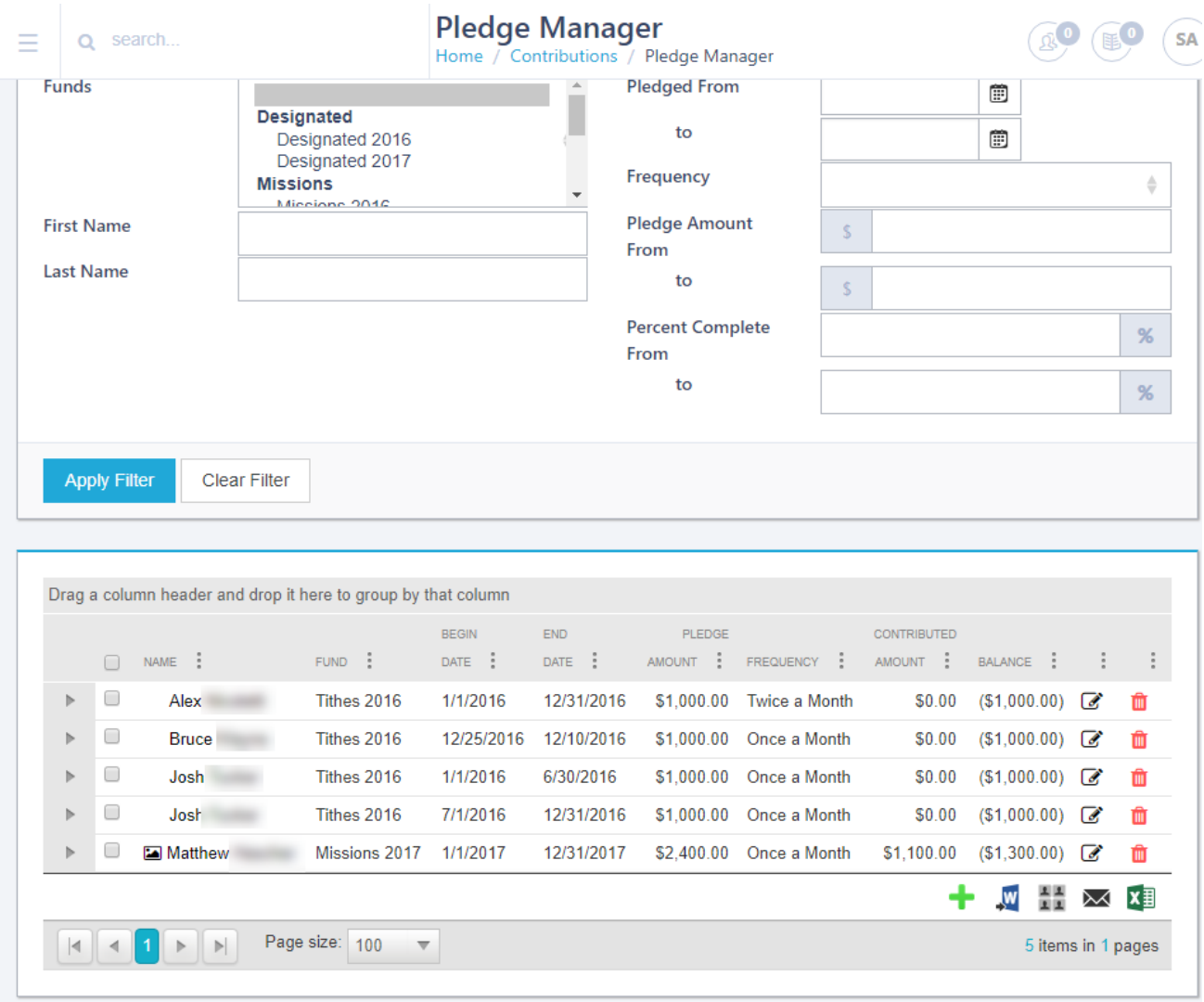


Pledge Manager

The **Pledge Manager** page allows you to view previously entered pledges bases on filter parameters. This is an updated version of the Pledges page. The filters allow you to search by Fund, Pledge Amount (Minimum and Maximum), and Percent Complete (Minimum and Maximum). Pledges listed on this page are based on the date range of the individual pledge and the date range of the fund.

- Click the **Expand** icon to view information about a pledge.
- Click the **Edit** icon to make changes to a pledge.
- Click the **Delete** icon to remove a pledge.
- Click the **Add icon** to create a new pledge.

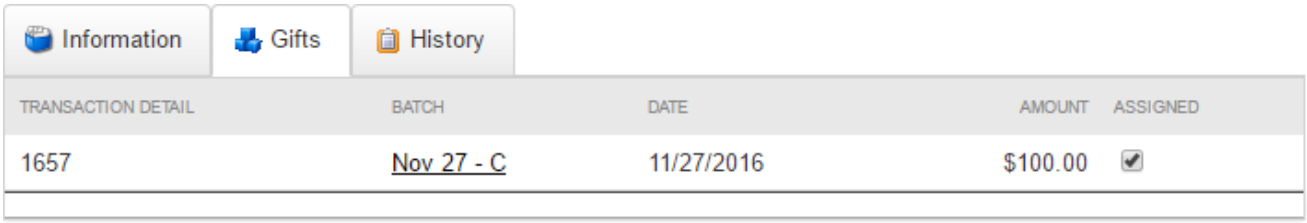
- After selecting one or more pledges, you have options to **Mail Merge**, **Bulk Update**, **Email**, or **Export to Excel**. (These options are located next to the Add icon.)



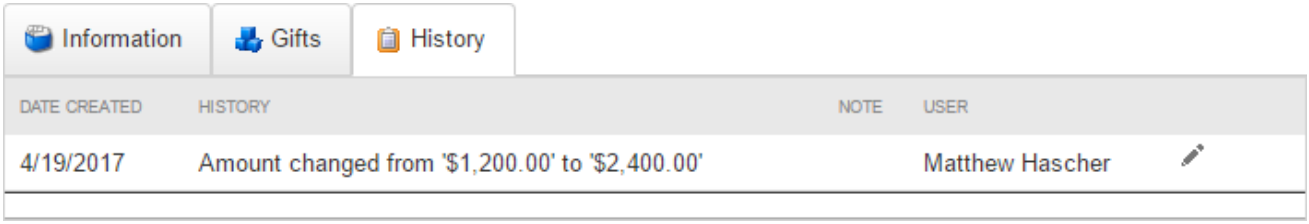
Gifts and History

When viewing information about the pledge, there are two additional tabs to view the **Gifts** and the **History**.

The **Gifts** tab displays the detail giving for this fund.



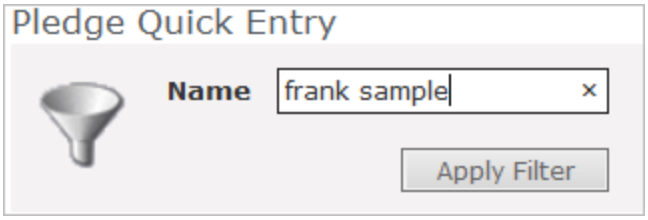
The **History** tab displays the creation of a new pledge, the information that is changed on a pledge, and the user that changed this information.



Pledge Quick Entry

On this page, you can enter one pledge amount, per fund, per contributor. Contributions processed during the pledge period, posts against that pledge. There is also the option to create Repeating Payments to post against this pledge.

1. From the **Contributions** menu, click the **Pledge Quick Entry** option.
2. Enter name and click the **Apply Filter** button.



3. Select the record.
4. Select a **Fund**.

NOTE: There is a module setting to hide inactive funds from this drop-down list.

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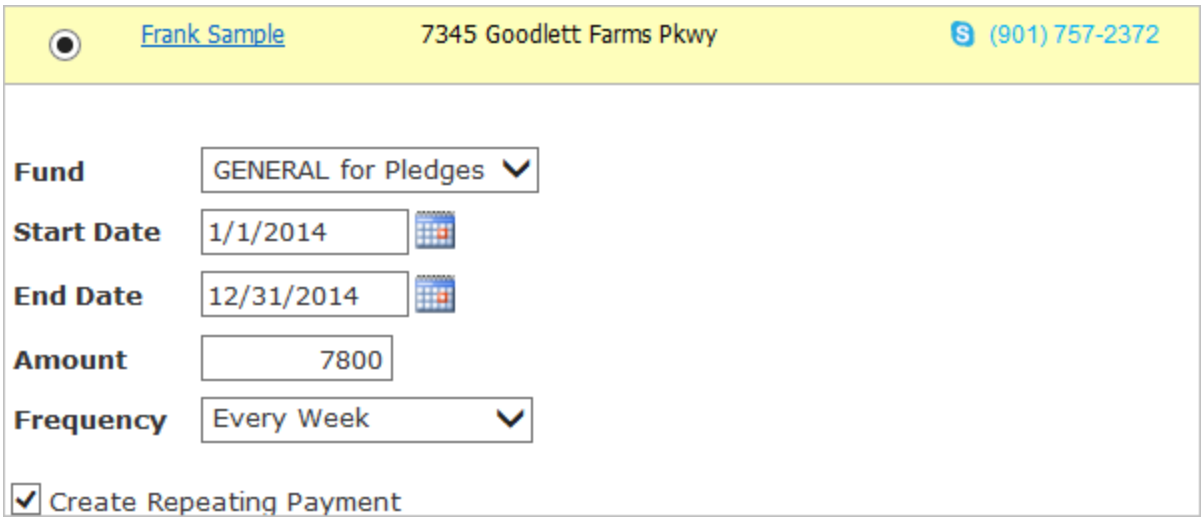
5. Enter or select the **Start Date**.

6. Enter or select the **End Date**.

7. Enter the **Amount**.

8. Select a **Frequency**. If you are using payment gateways, you must select one before pledge frequencies display.



9. Click the **Save** button. If the payment gateway is setup, you can optionally create a repeating payment from this page.

10. Select a **Frequency**.

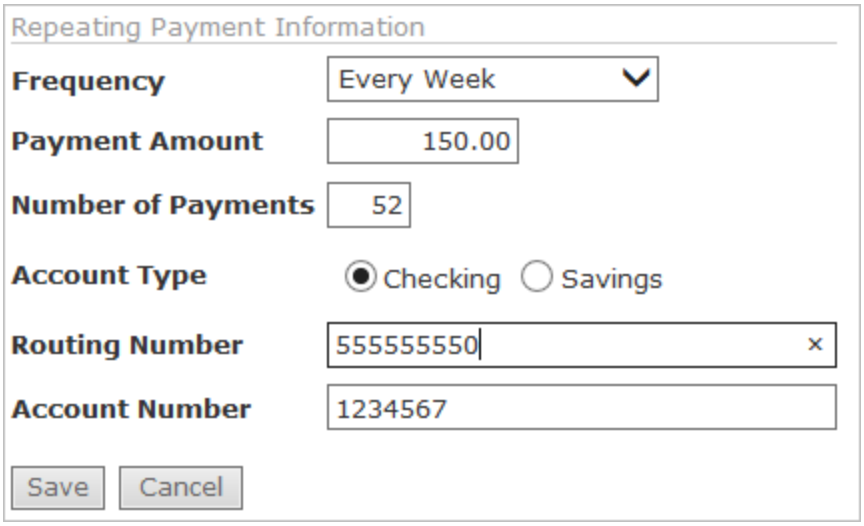
11. Enter **Payment Amount**.

12. Enter the **Number of Payments**.

13. Select **Account Type**.

14. Enter **Routing Number**.

15. Enter **Account Number**.

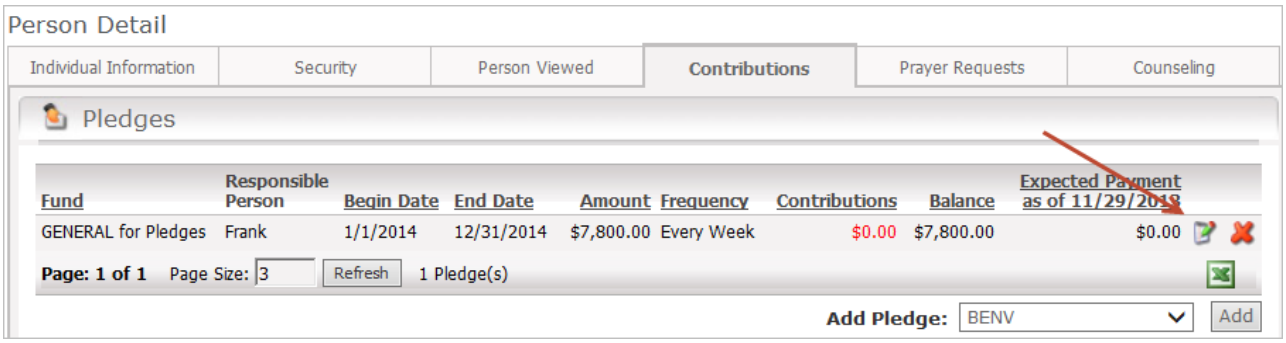


16. Click the **Save** button.

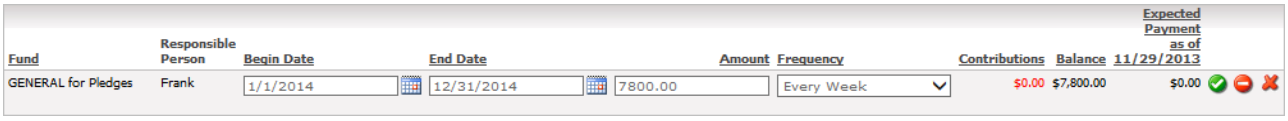
Edit a Pledge

1. Click the **Contributions** tab on the **Person Detail** page.

2. Click the **Edit** icon of the pledge you would like to edit.



3. Edit the amount and dates, as desired.



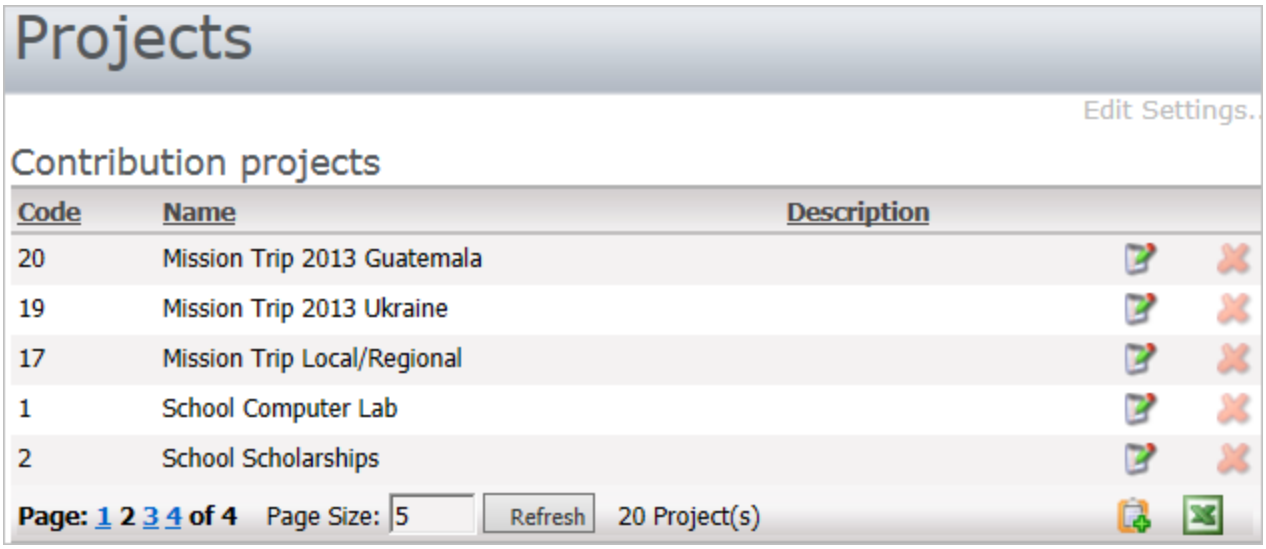
4. Click the **Update** icon.

Projects

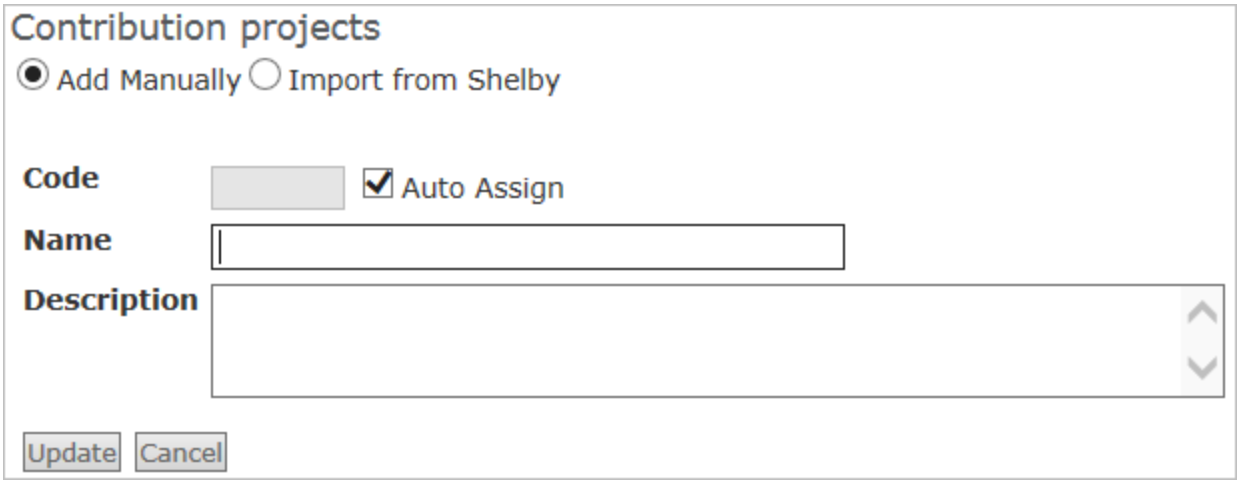
Projects are available for both Funds and Mission trips.

Add a Project

1. On the **Project List** page, click the **Add New Contribution Project** icon.



2. Proceed with completing all fields to manually add a project or use the option to import projects from Shelby v.5.



3. Enter the **Code** or leave **Auto Assign** selected. If you select Auto Assign, Arena assigns the next sequential project code.

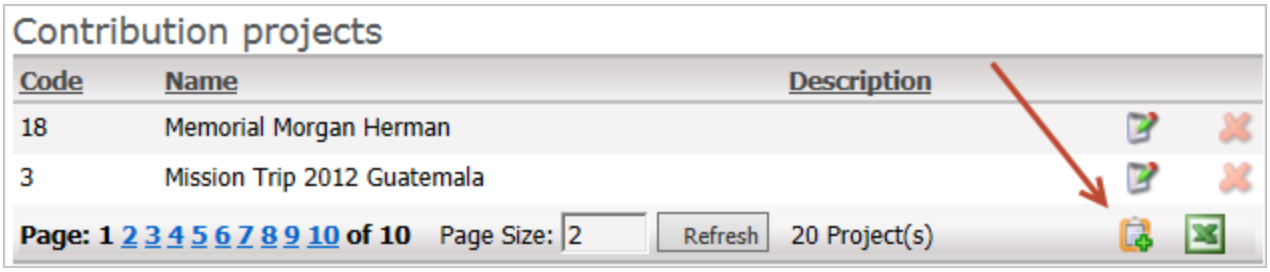
4. Enter the **Name** for this project.

5. Enter a **Description** for this project

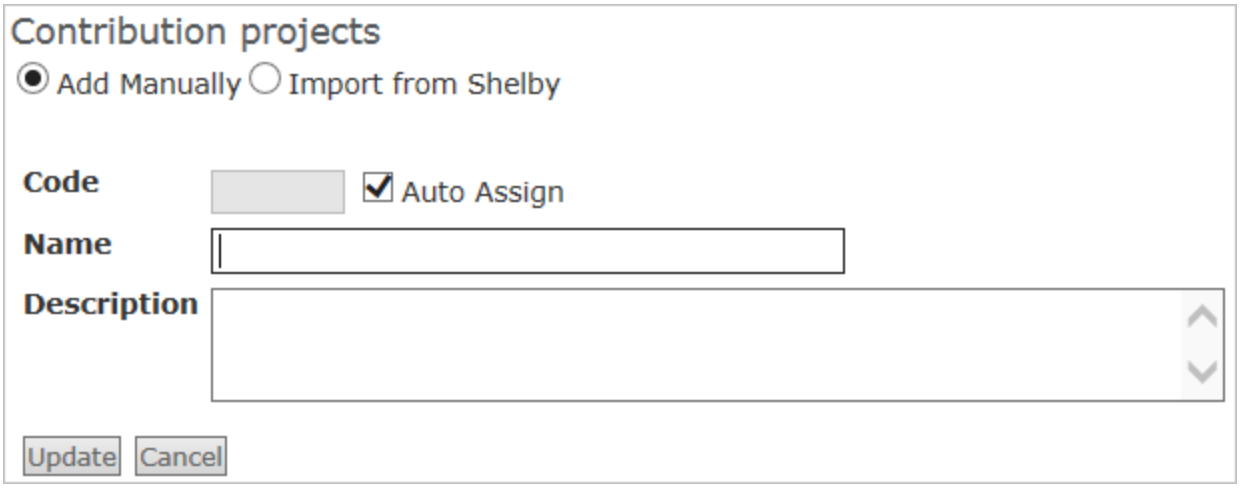
6. Click the **Update** button.

Import to Shelby v.5 Active Project Code to Arena

1. On the **Project List** page, click the **Add New Contribution Project** icon.



2. Select the **Import from Shelby** radio button. You can import Shelby v.5 Project Codes not already in use in Arena.



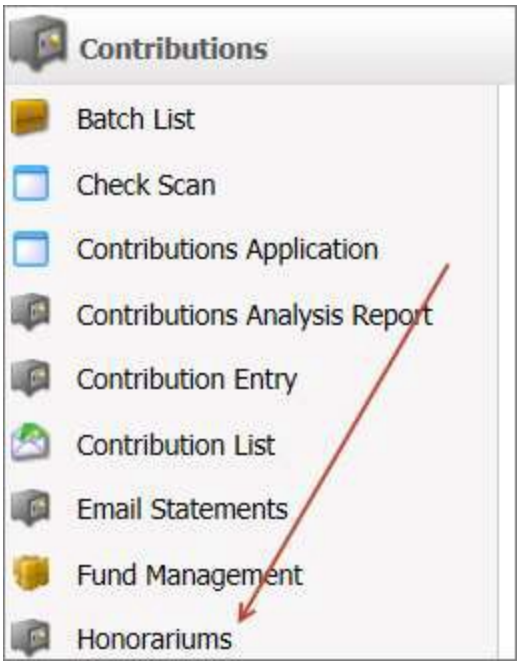
3. Select projects to import.
4. Click the **Edit** icon of the project you just imported.
5. Edit as desired.
6. Click the **Update** button.

Honorariums

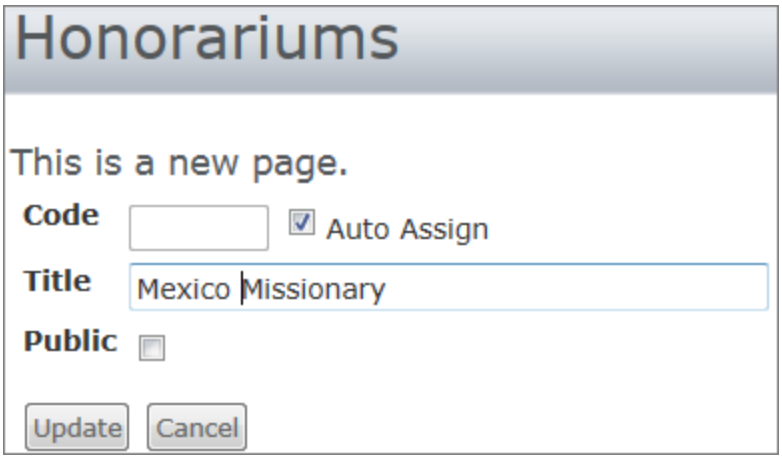
Use Honorariums (Memorials) to enable contributors to specify their inspiration to give such as in memory of someone. There is also the option to display honorariums on the online giving page. Both public and non-public honorariums are available internally for batch processing on the **Contribution Entry** page.

Add an Honorarium

1. From the **Contributions** menu, click the **Honorariums** option.



2. Enter a **Code** for the honorarium or leave **Auto Assign** selected.



3. Enter the honorarium **Title**.

4. Select **Public** to enable online giving. Regardless of checking public, the honorarium is available

when processing contributions.

Email Statements

NOTE: You must have the "EmailContributionStmt" Agent configured prior to sending email statements. From the **Administration** menu, select the **Agent Management** option to ensure this is configured.

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1. Set which **Contribution Statement Report** is being used in the **Module Settings**.
2. From the **Email Statements** page, you can select all records with Contributions or select a specific Public List of records to email contribution statements.

NOTE: When selecting **All People**, Arena will build the list of recipients based on the choices made below and for people who are marked email statement. You can build a public list in order to email statements to a smaller group of people. Create a list of records to send statements or skip this step if you elect to email all contributors.

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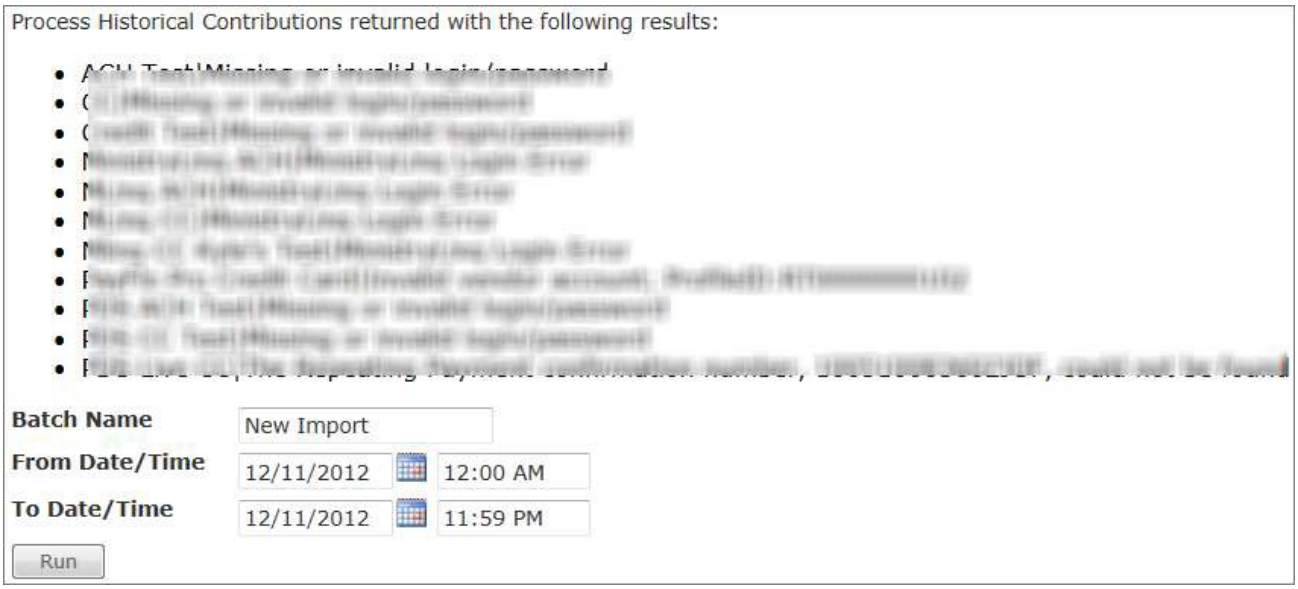
3. Enter or select the **From Date**.
4. Enter or select the **To Date**.
5. Enter the **Minimum Gift** amount to limit who will receive a Statement. This is the total giving amount.
6. If you do not select to **Filter Amounts By Date**, the statement will be for all donations in the year of the end date. Select this option for non year end statements.
7. The **Include Pledge Without Gift** includes people who have not made donations if they have made a pledge. Select this option for non year end statements.
8. **Select Funds**: If you are using the Contribution Statement Five Funds, you do not have to change these options as they are not used.
9. Clicking the **Send Emails** button queries the messages to be sent by the Email Contribution Statement Agent.

Import from Gateway

Use this page to import a file from an Arena supported payment gateway provider. Verify with your Arena Administrator that the Online Giving Rejected Contribution System Email is setup to run.

1. Enter a **Batch Name**, **Dates** and **Times** for this batch.

2. Click the **Run** button. Arena processes the payment gateway transactions for the date and time specified.

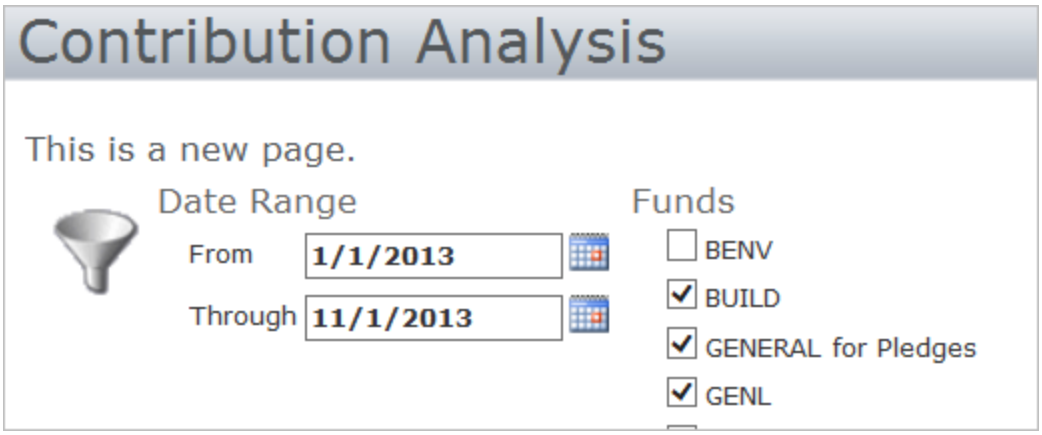


Contribution Analysis

This report displays an overall contribution summary based on the parameters you set in the filters.

1. From the **Contributions** menu, click the **Contributions Analysis** option.

2. Enter the date range and select funds.



3. Click the **Apply Filter** button to display the report.

Total Dollars Given	$57,660.00
Average Given	$1,226.81
Median Given	$125.00
Contributors	47
Contributions	77

Range	Contributors	Percentage Contributors	Average Given	Median Given	Total Given	Percentage
Top 10%	4	8.51	7,787.50	8,075.00	31,150.00	54.02
Top 20%	8	17.02	5,762.50	4,750.00	46,100.00	79.95
Top 30%	12	25.53	4,375.00	4,125.00	52,500.00	91.05
Top 40%	16	34.04	3,422.19	2,100.00	54,755.00	94.96
Top 50%	20	42.55	2,816.50	1,700.00	56,330.00	97.69
Top 60%	24	51.06	2,378.33	875.00	57,080.00	98.99
Top 70%	28	59.57	2,048.21	552.50	57,350.00	99.46
Top 80%	32	68.09	1,795.31	400.00	57,450.00	99.64
Top 90%	36	76.60	1,598.06	400.00	57,530.00	99.77
Top 100%	47	100.00	1,226.81	125.00	57,660.00	100.00

19% of the contributors gave 83%
($48,100 of the total amount)

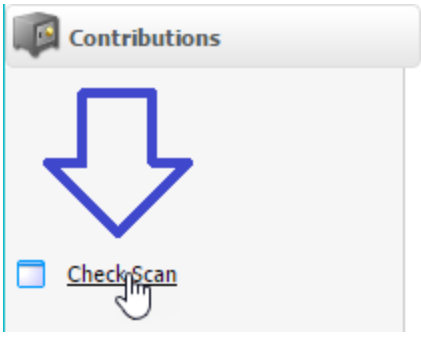
Check Scan

The Check Scan option is a utility that allows you to scan a batch of checks, save them to a file, and then import that file into Arena. Before the Check Scan option can be used, the scanner driver must be installed. See the Installing your Scanner page for instructions on installing a scanner driver.

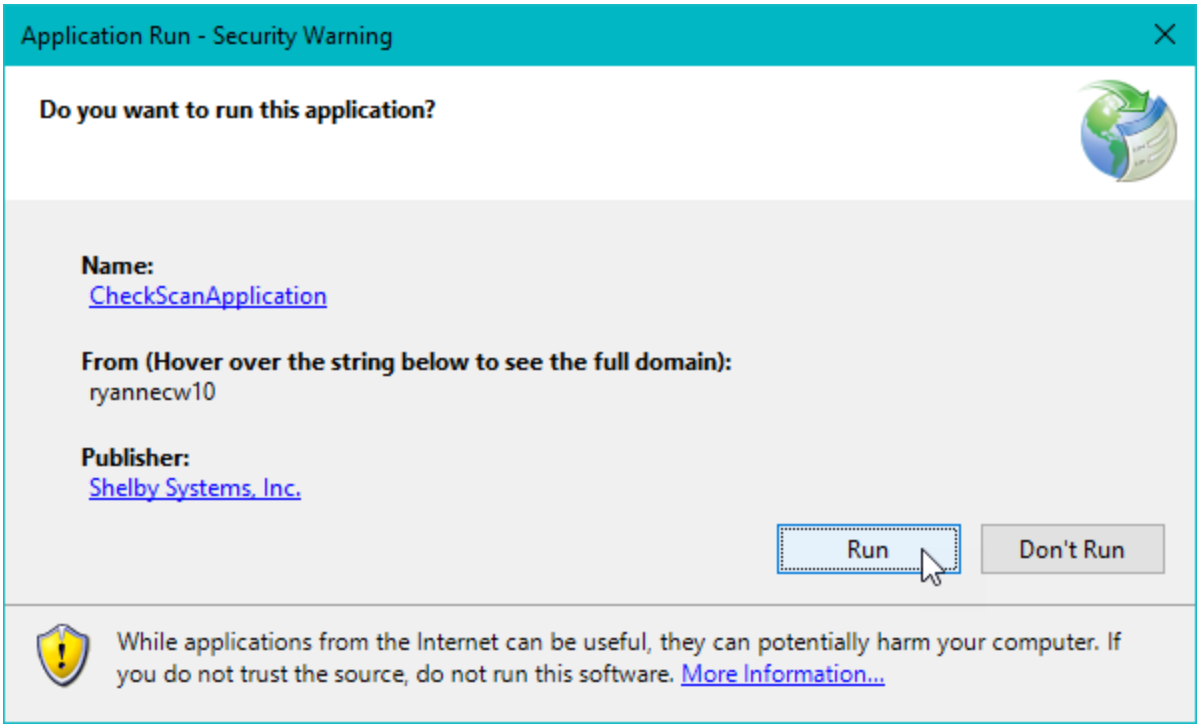
After the Canon scanner has been installed and the scanner is plugged in and connected to your PC, follow the steps below to use the Check Scan application. The Check Scan application must be run from an Internet Explorer browser the first time. After it is run the first time, a desktop shortcut can be used to access the Check Scan application.

1. Log into your Arena site from **Internet Explorer**.

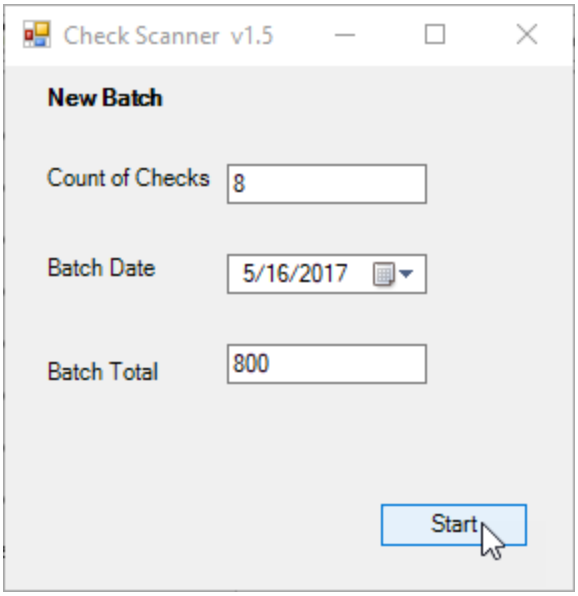
2. From the Contributions menu, select the **Check Scan** option.



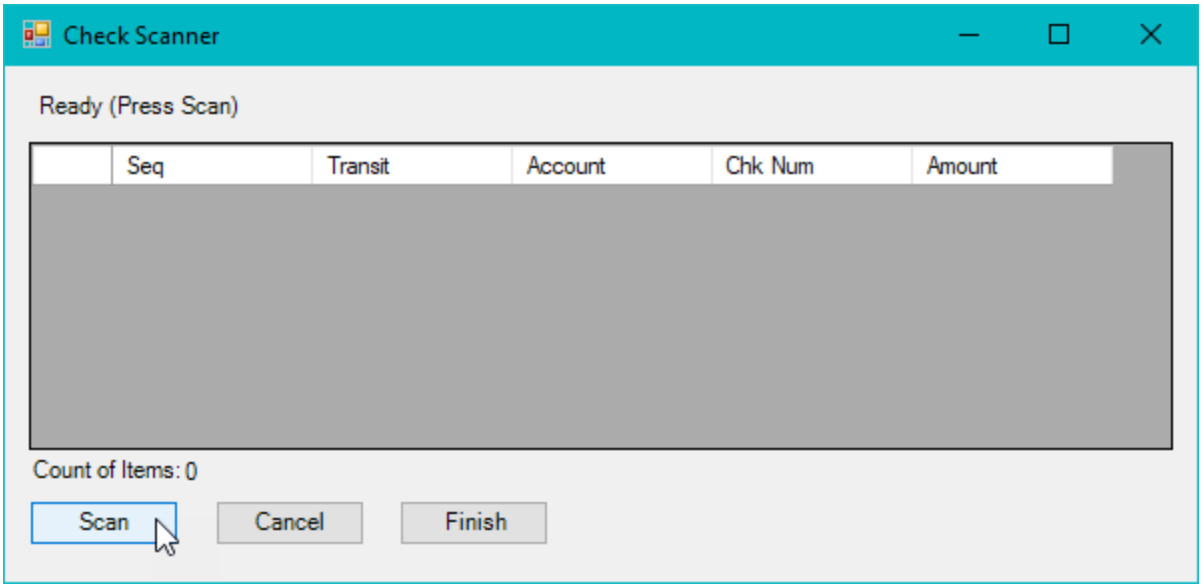
3. Select the **Run** button on the Security Warning window that appears.



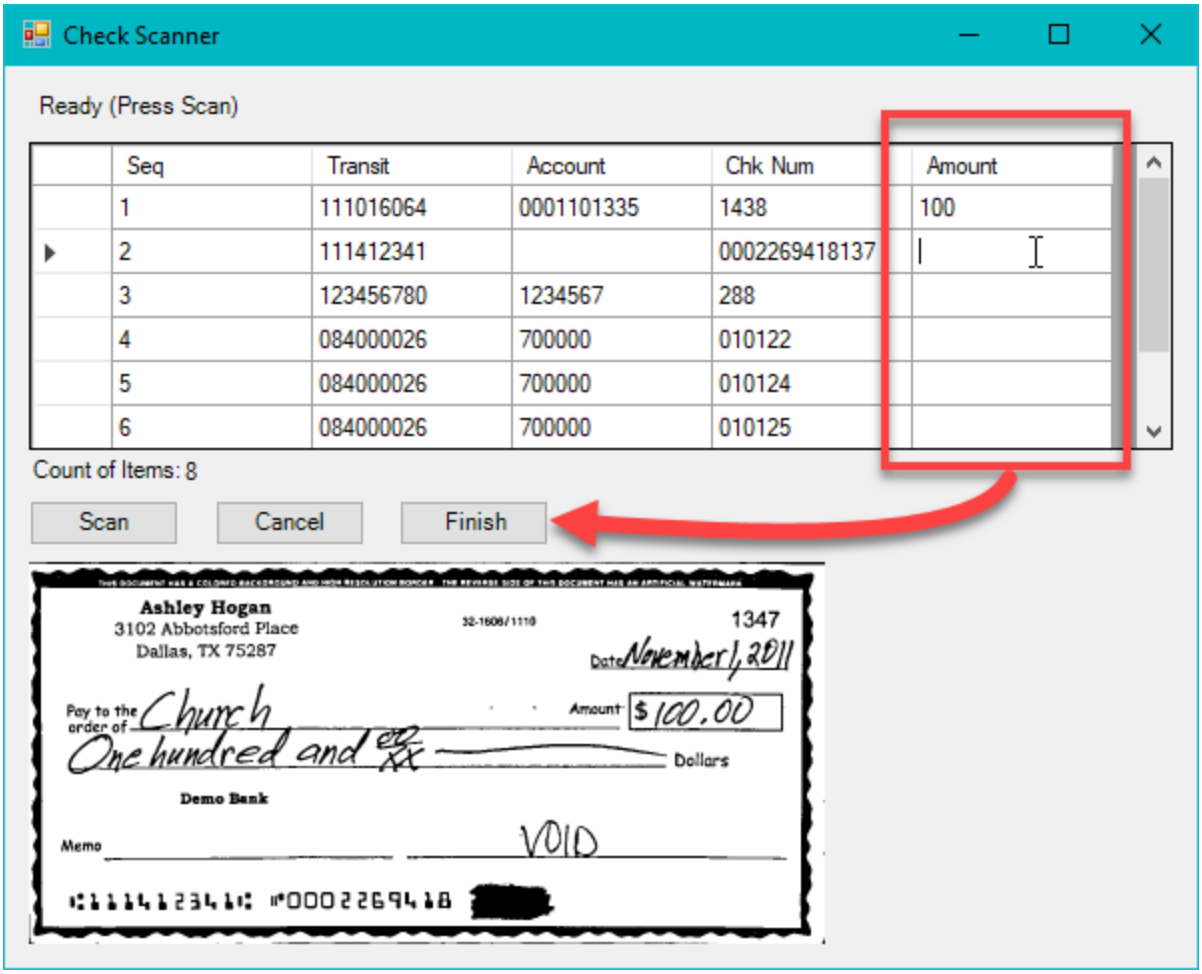
4. Enter the total number of total checks in the **Count of Checks** field, the **Batch Date**, and the **Batch Total** (The total amount of all checks) and then click the **Start** button.



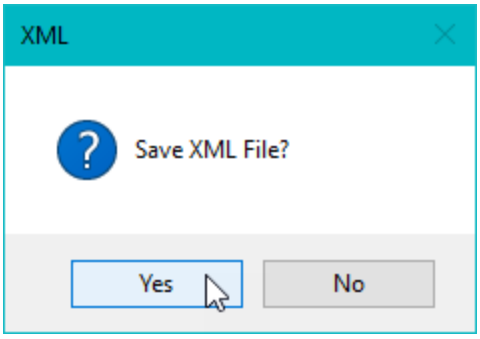
5. When the Check Scanner window appears, place the checks into the scanner and then click the **Scan** button to start the scanning process.



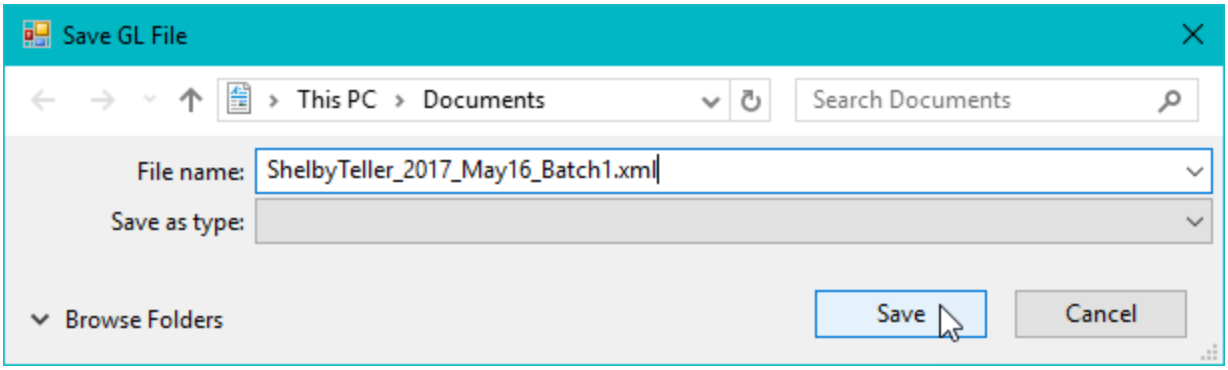
6. After the checks have been scanned, they appear on the Check Scanner window. Enter the Amount for each check and then click the **Finish** button.



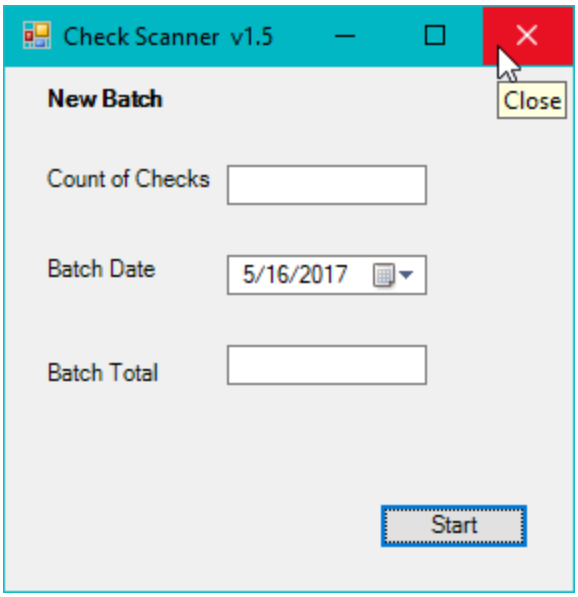
7. You are then prompted to save your batch as and XML file. Click the **Yes** button.



8. Next, a dialog box appears which allows you to rename and save the XML file in a location of your choosing. Click the **Save** button after you have renamed the file and selected an appropriate location to save the file.

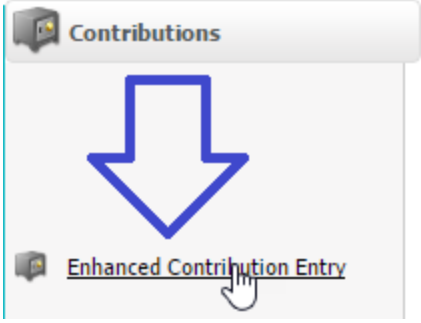


9. If you are finished scanning checks, click the **Close** option in the upper right-hand corner. Otherwise, continue entering batches. (Each batch should be saved as a separate XML file.)

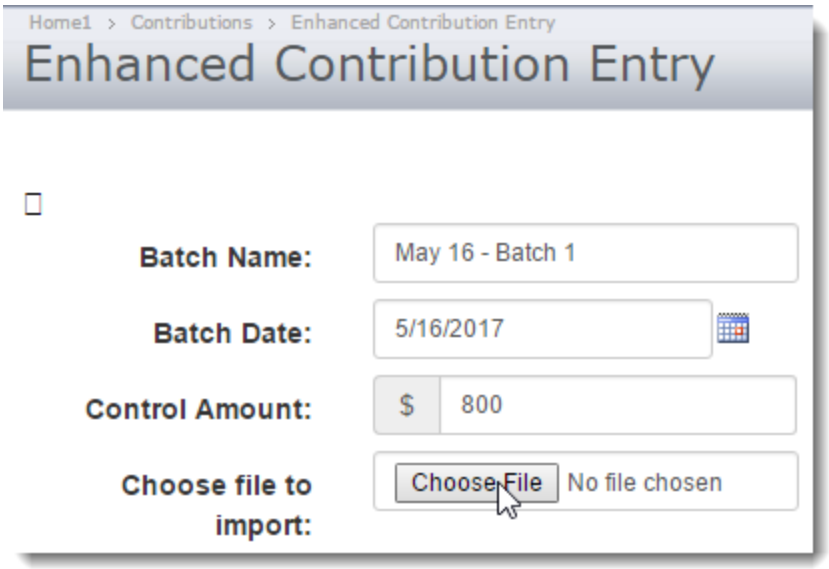


Importing your scanned checks (XML Batch File) into Arena

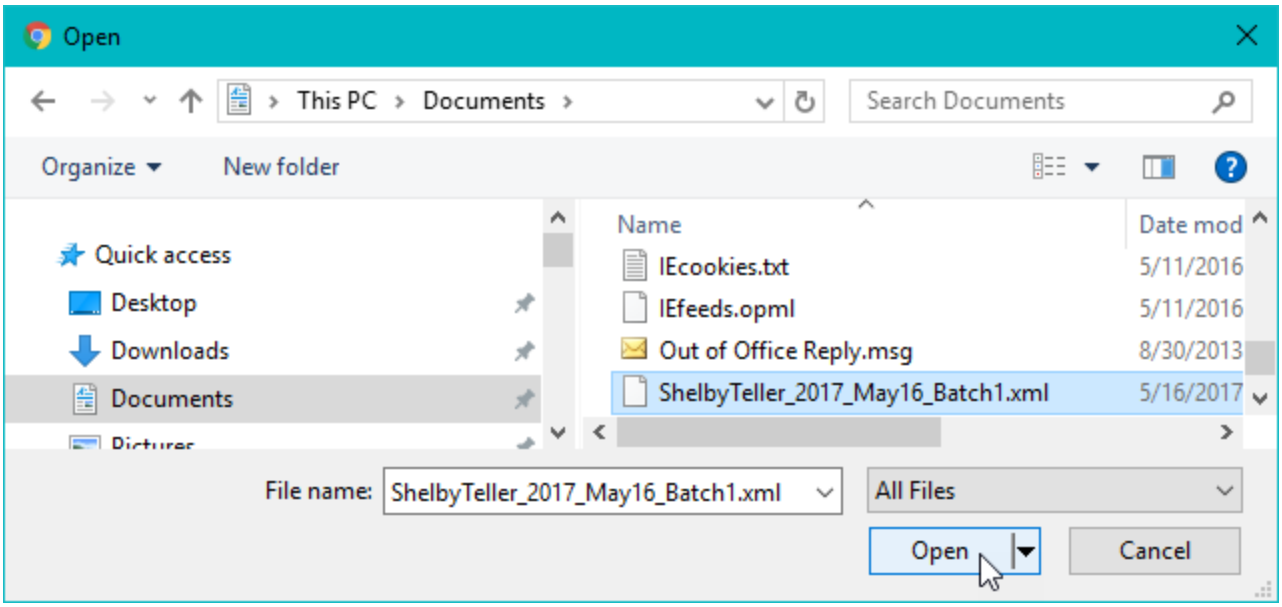
1. From the Contributions menu, select the **Enhanced Contribution Entry** option.



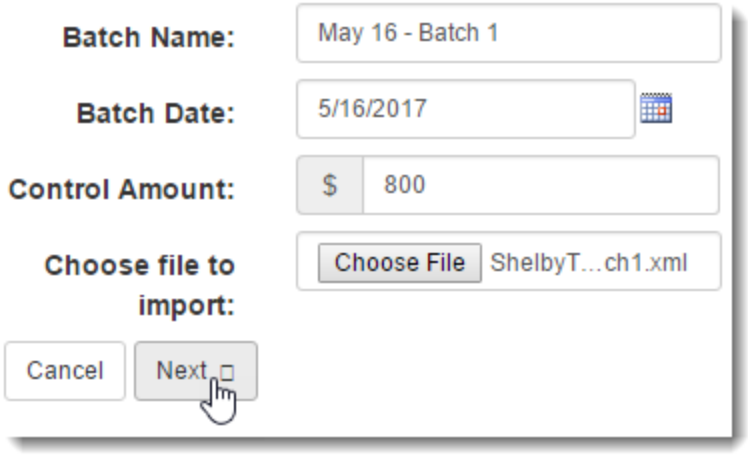
2. Next, enter the **Batch Name**, **Date**, and **Control Amount** and then click the **Choose File** button.



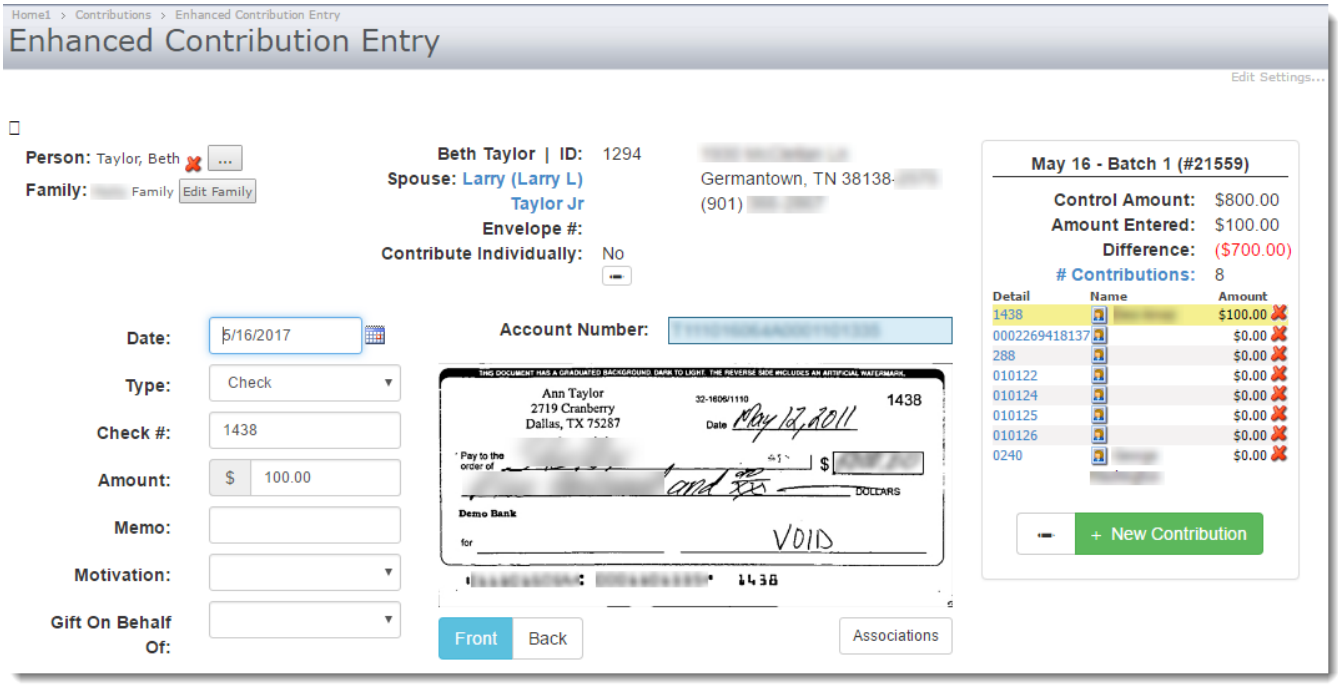
3. Locate the XML batch file using the dialog box and then click the **Open** button.



4. Next, click the **Next** button.



5. The Enhanced Contribution Entry page appears. Notice that scanned checks are visible on the entry page. Enter the details for the contribution and continue entering the batch until all contributions are recorded.



See the Enhanced Contribution Entry page for assistance on entering your contributions.

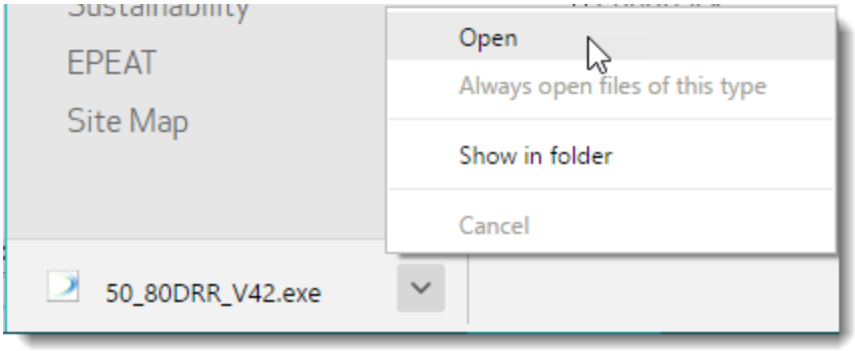
Check Scan

This page walks you through installing a Canon CR-50 scanner. Links for the drivers are listed below:

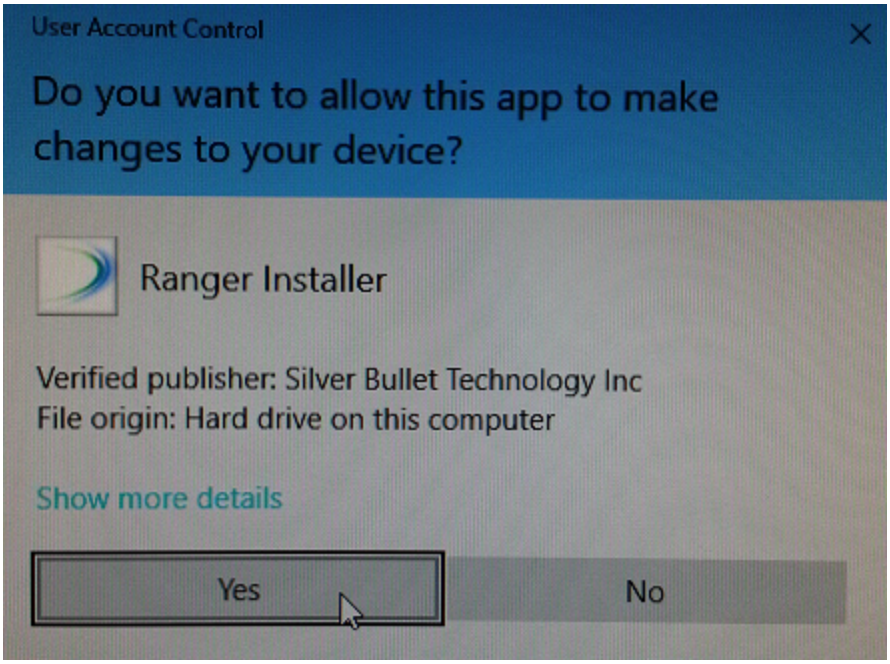
- To install your CR-50/80 scanner, see the Canon CR-50/80 Driver Download page.
- To install your CR-55 scanner, see the Canon CR-55 Driver Download page.
- To install your CR-135 scanner, see the Canon CR-135 Driver Download page.

1. From the Canon Drivers & Downloads page, click the **Select** button next to the Ranger Driver you want to download and then click the **DOWNLOAD** button.

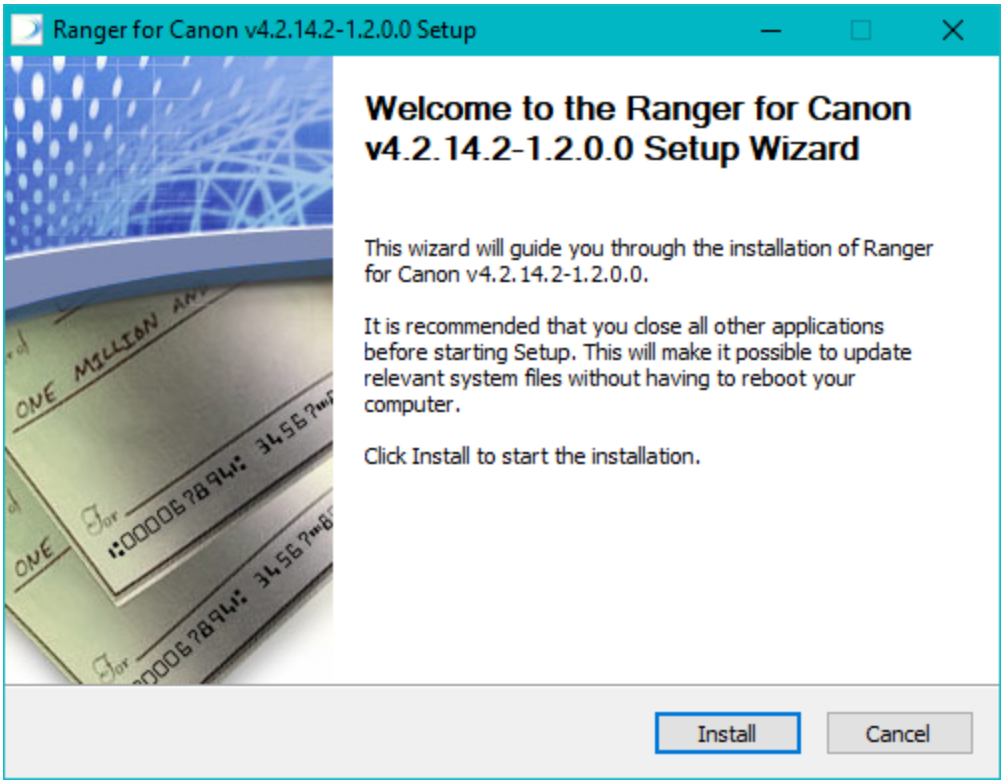
2. Next, select to **Open** the downloaded driver.



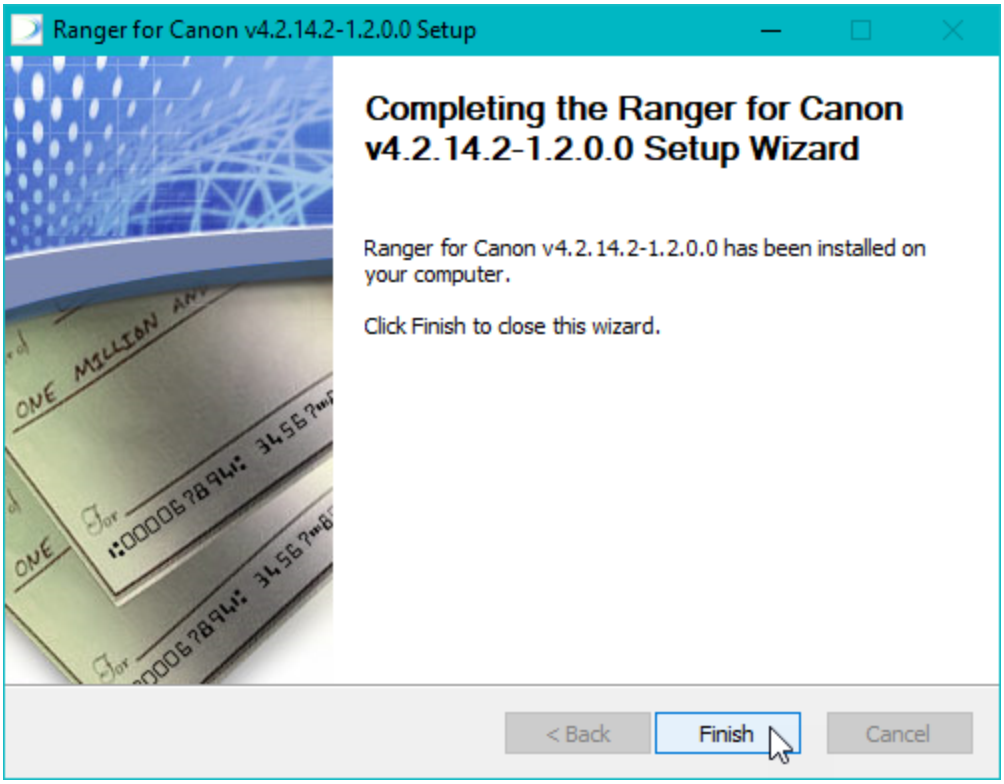
3. When the User Account Control window appears, click the **Yes** button.



4. Click the **Install** to start the installation.



5. Click the **Finish** button to close the wizard.



6. Now that the driver is installed, plug the scanner power cable into a power outlet and then connect the USB cable to your PC. See the Check Scan page instructions on how to use the Check Scan application.

Financials Integration

The Financials Integration page allows you to connect Arena with your Financials. After setting up the connection, you can map Funds, Users, and Projects.

This Help page contains the following sections:

Setup the Connection

Funds tab

Users tab

Projects tab

Setup the Connection

The following fields allow you to setup the Financials Integration connection.

1. **Enable Financial Integration**: Check this box to display the options on the Financials Integration page.

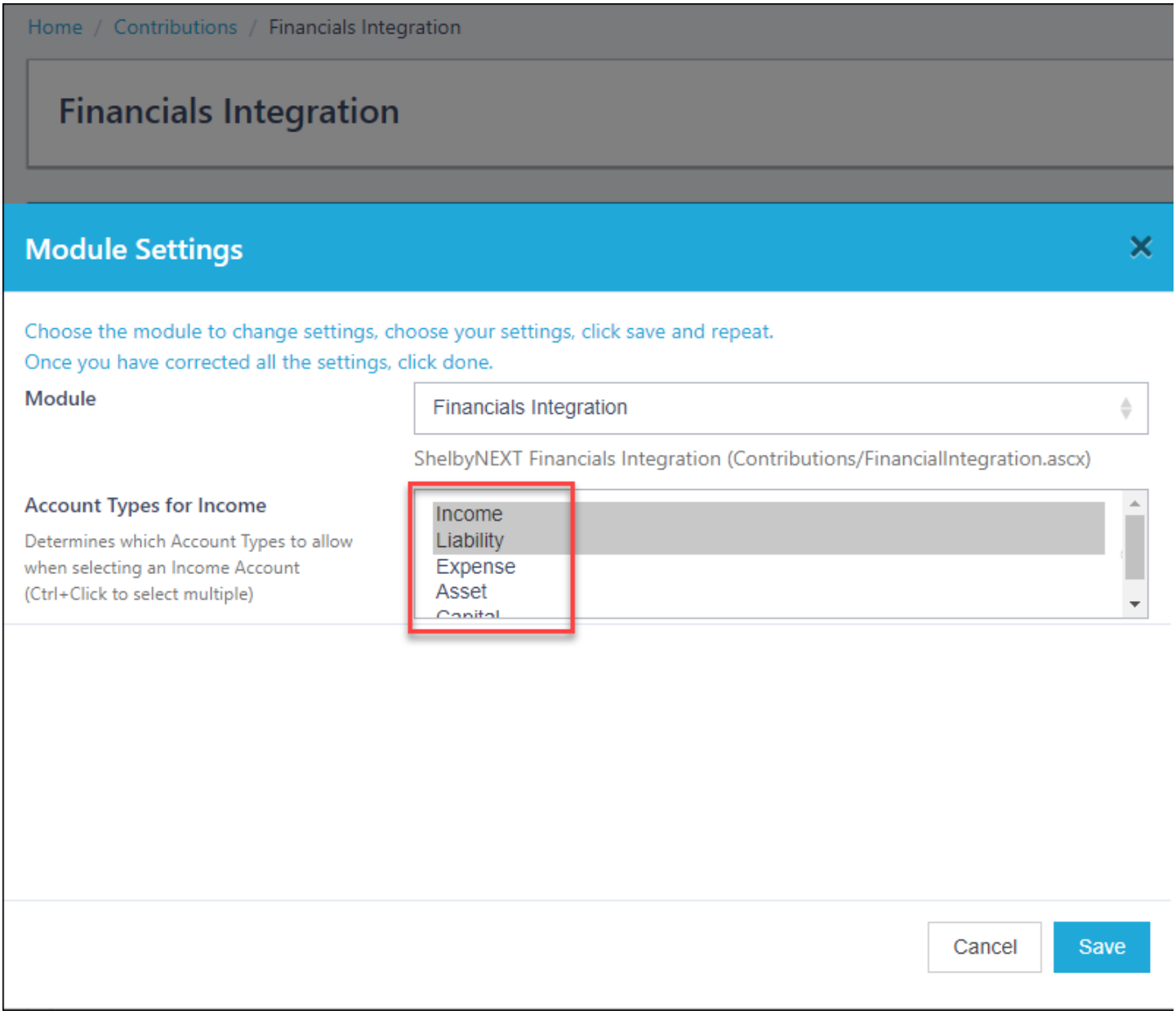
2. After clicking the **Enable Financial Integration** check box, you have the following options available.
   - **Financials URL**: Enter the web address for your on-line financials site.
   - **API Key**: Enter the API Key.
   - **API Secret**: Enter the API Secret.
   - **Test Connection**: Click the **Test Connection** button to test the connection from Arena to your on-line financials database.

3. Click the Save button after a successful test connection to retain the settings for this page.

Funds tab

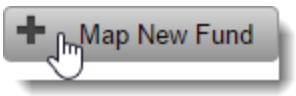
The Funds tab allows you to connect a fund in Arena with a bank account and an income account in the Financials. This connection is used when exporting contribution batches to be imported into the Financials as journal entries.

NOTE: From the **Financials Integration** screen, choose **Module Setting** to select the Account Types to allow when selecting an Income Account. (Ctrl+Click to select multiple)

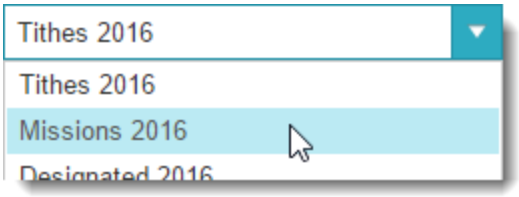


Follow the steps below to map an Arena fund to the Financials.

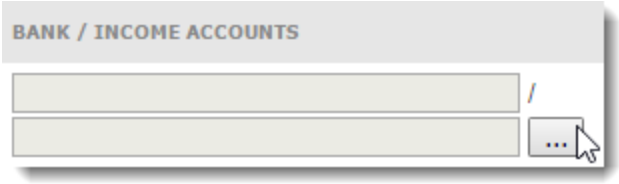
1. Click the **Map New Fund** button.



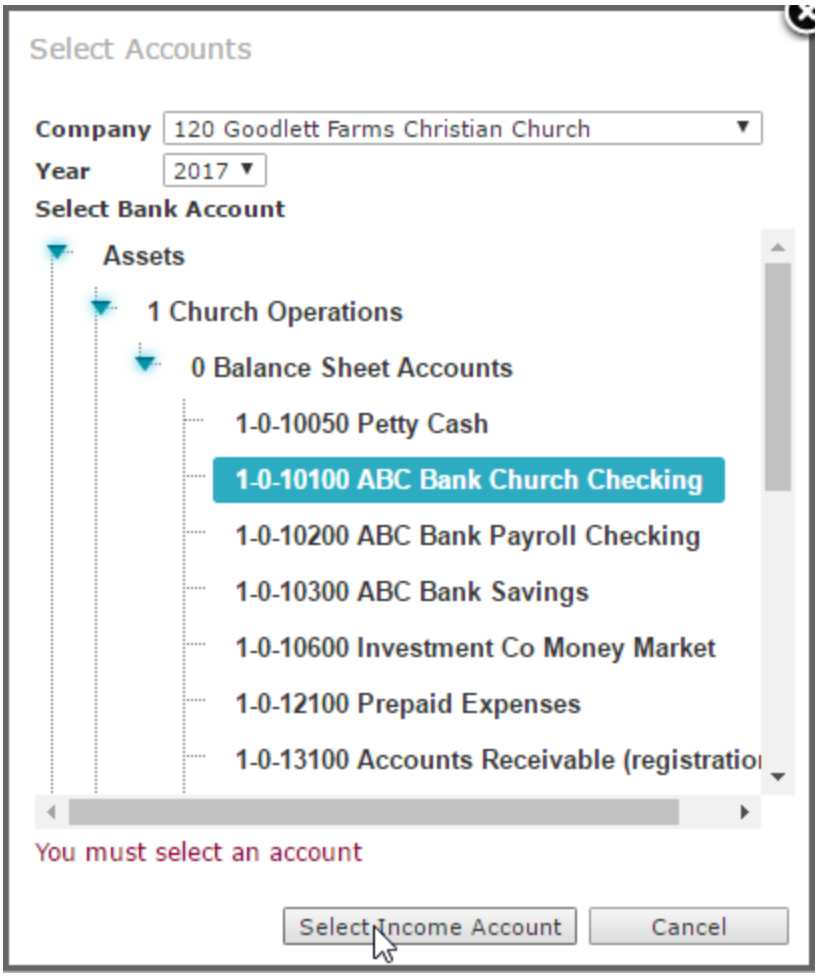
2. Select a **Fund** from the drop-down listing.



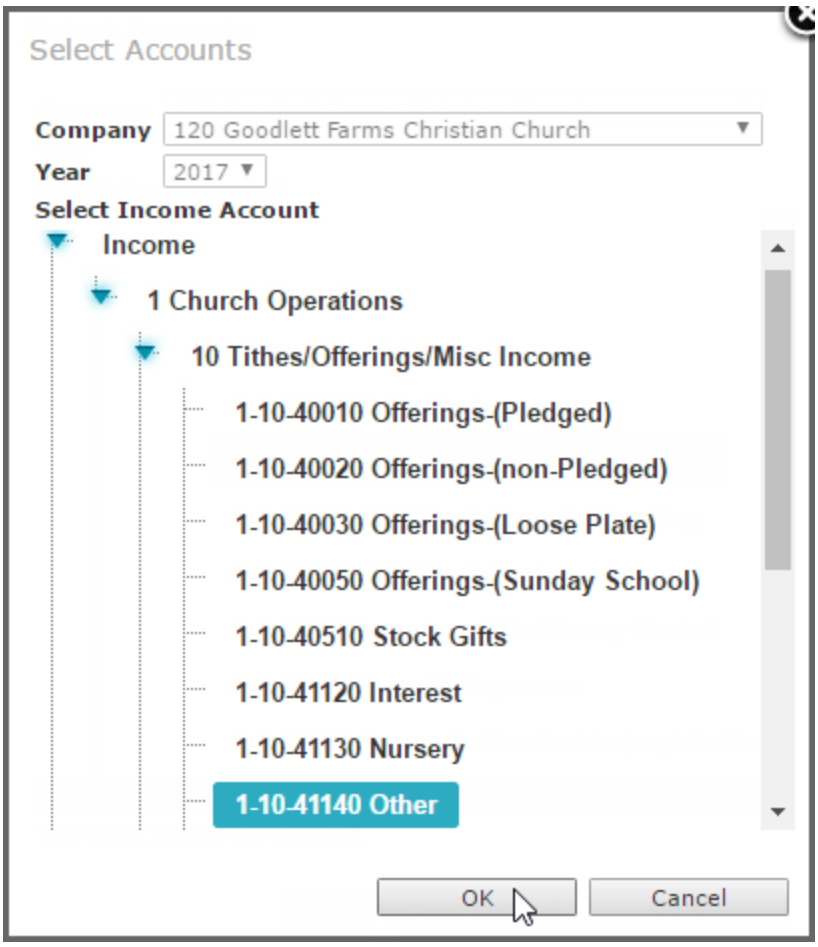
3. Click the **Search** button.



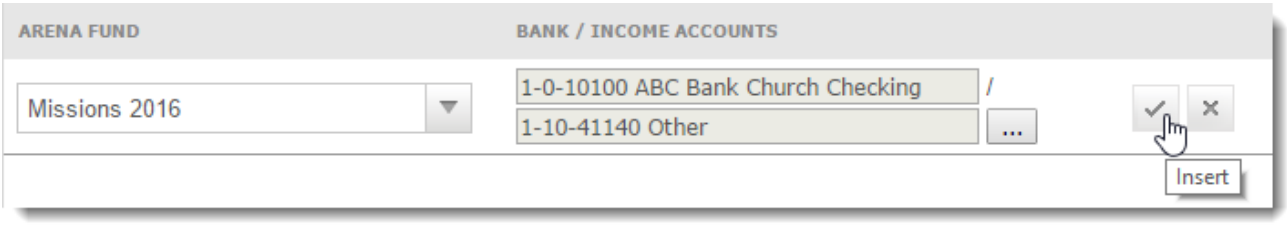
4. The Select Accounts window appears. Select the **Company** and **Year** from the drop-down lists and then navigate to your bank account using the tree-view selector. Click on your bank account and then click the **Select Income Account** button to continue.



5. Navigate to your income account for this fund using the tree-view selector. Click on your income account and then click the **OK** button.



6. Review the selections and then click the **Insert** icon.



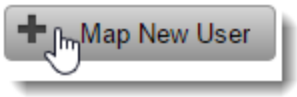
7. After a Fund has been mapped, you can modify or delete the mapping.
   - Click the **Edit** icon to modify the mapping.
   - Click the **Delete** icon to remove the mapping.

Users tab

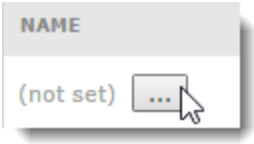
The Users tab allows you to connect an Arena user with a Financial user so that the Arena user inherits account rights from the Financial User. This is useful for when you are mapping an Arena fund to accounts in the Financials.

Follow the steps below to connect an Arena user to a Financials user.

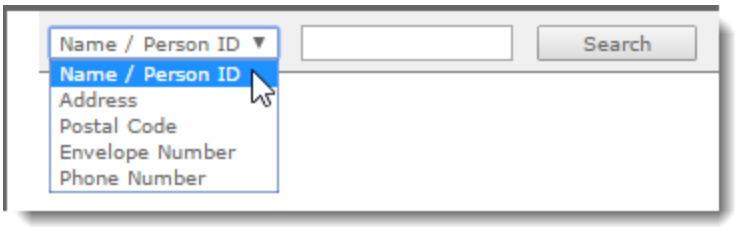
1. Click the **Map New User** button.



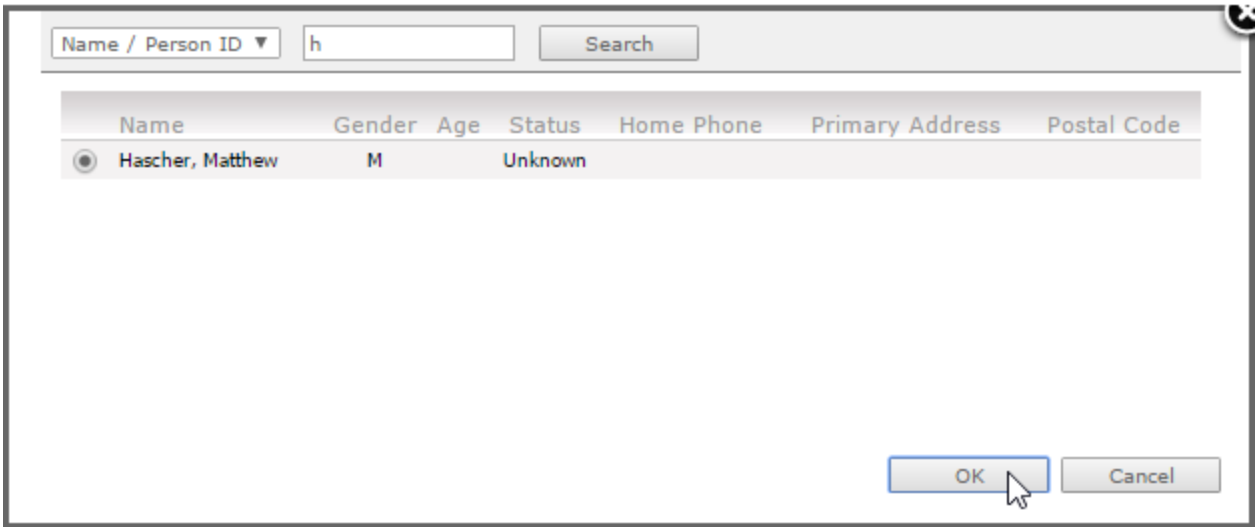
2. Click the **Search** button.



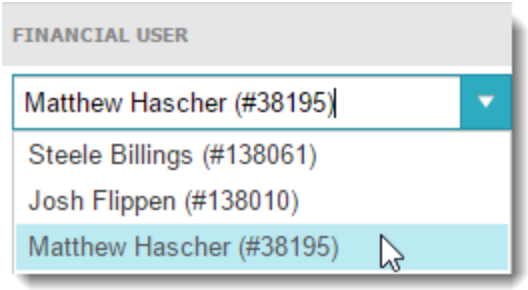
3. The Person Search window appears. Select a search criteria from the drop-down list.



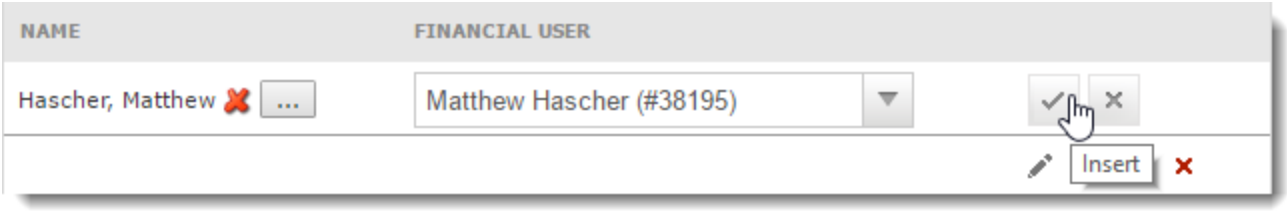
4. Enter your search criteria and then click the **Search** button. After the names appear, select a name and then click the **OK** button.



5. Select a **Financial User** from the drop-down list.



6. Review the selections and then click the **Insert** icon.



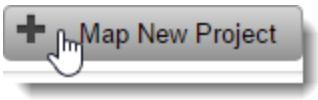
7. After a User has been mapped, you can modify or delete the mapping.
   - Click the **Edit** icon to modify the mapping.
   - Click the **Delete** icon to remove the mapping.

Projects tab

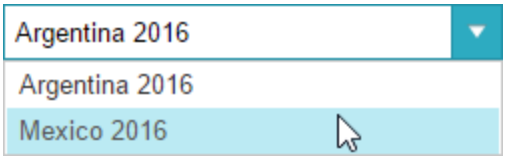
The Projects tab allows you to connect an Arena project to a Financials project. When a batch is exported from Arena, the projects that are assigned to funds are added to the detail lines of the journal.

Follow the steps below to connect an Arena project to a Financials project.

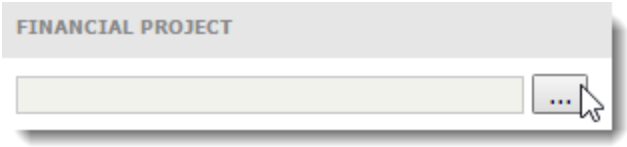
1. Click the **Map New Project** button.



2. Select an **Arena Project** from the drop-down listing.

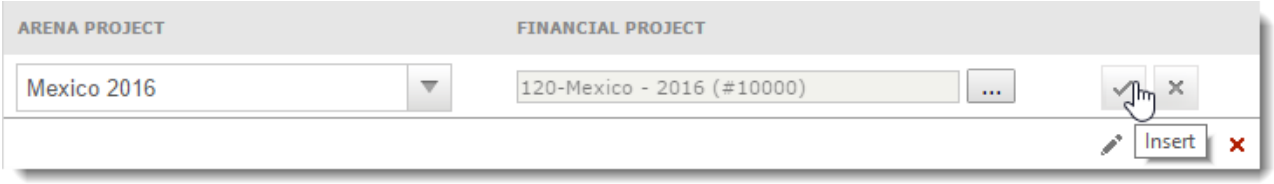


3. Click the **Search** button to select a Financial Project.



4. The Pick Financials Project window appears. Select the **Company** and corresponding **Project** from the drop-down lists and then click the **OK** button.

5. Review the selections and then click the **Insert** icon.

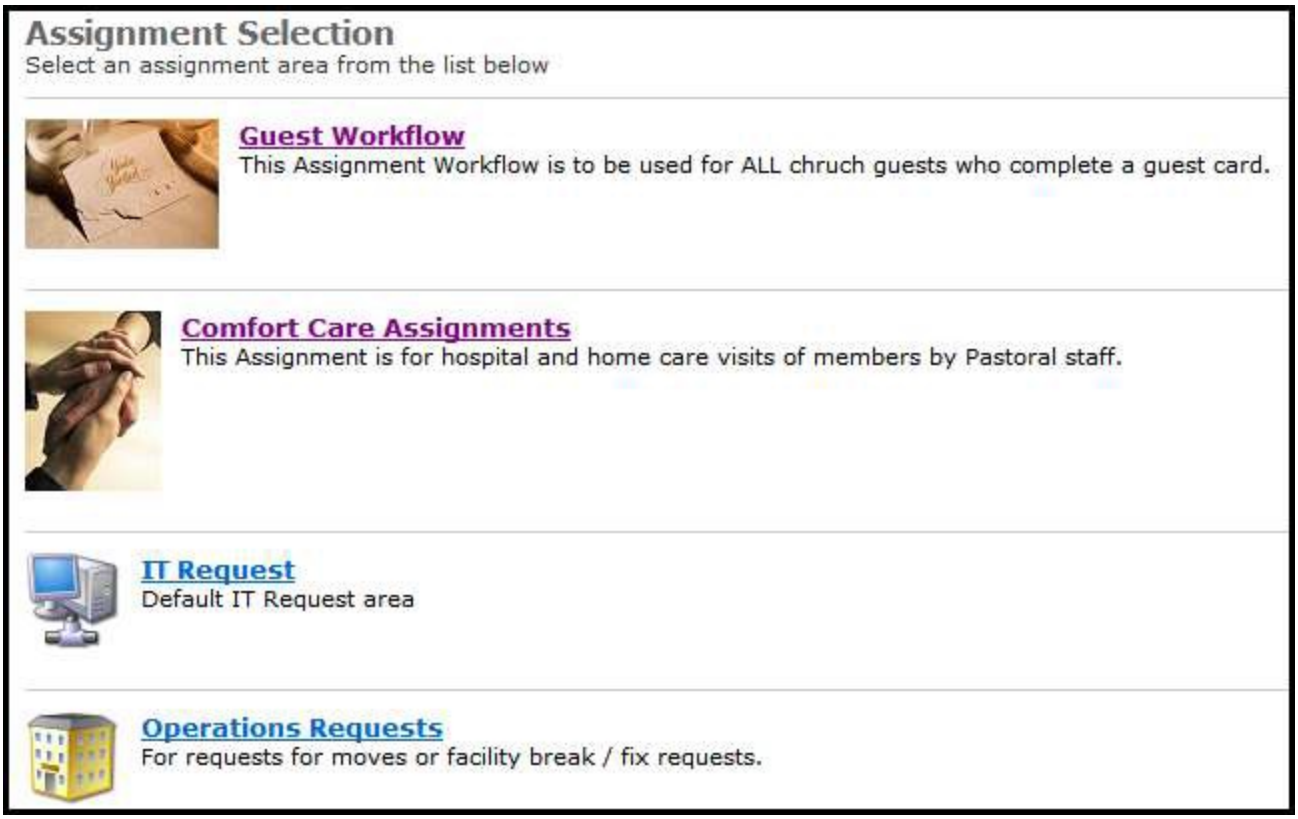


6. After a Project has been mapped, you can modify or delete the mapping.

- Click the **Edit** icon to modify the mapping.
- Click the **Delete** icon to remove the mapping.

Assignments

Assignments are Arena's request tracking system. You can use assignments to track many different types of requests such as IT, Operations, Comfort Care Ministries, assimilation processing and more. You can also use Assignments to begin a Workflow from the **Person Detail** page.



Assignment Types

Use the **Assignment Type** page to create various Assignment Types, using Child Assignment. You also want to verify, with your organization's Arena Administrator, the below features are working as desired. The hierarchy of Assignments works similar to Tags. Security inherits from the parent level of an assignment type.

Turn on ArenaMailQueue Agent.

Turn on ArenaAssignment/ProcessState Agent, if using Workflow States.

Create Assignment System Emails.

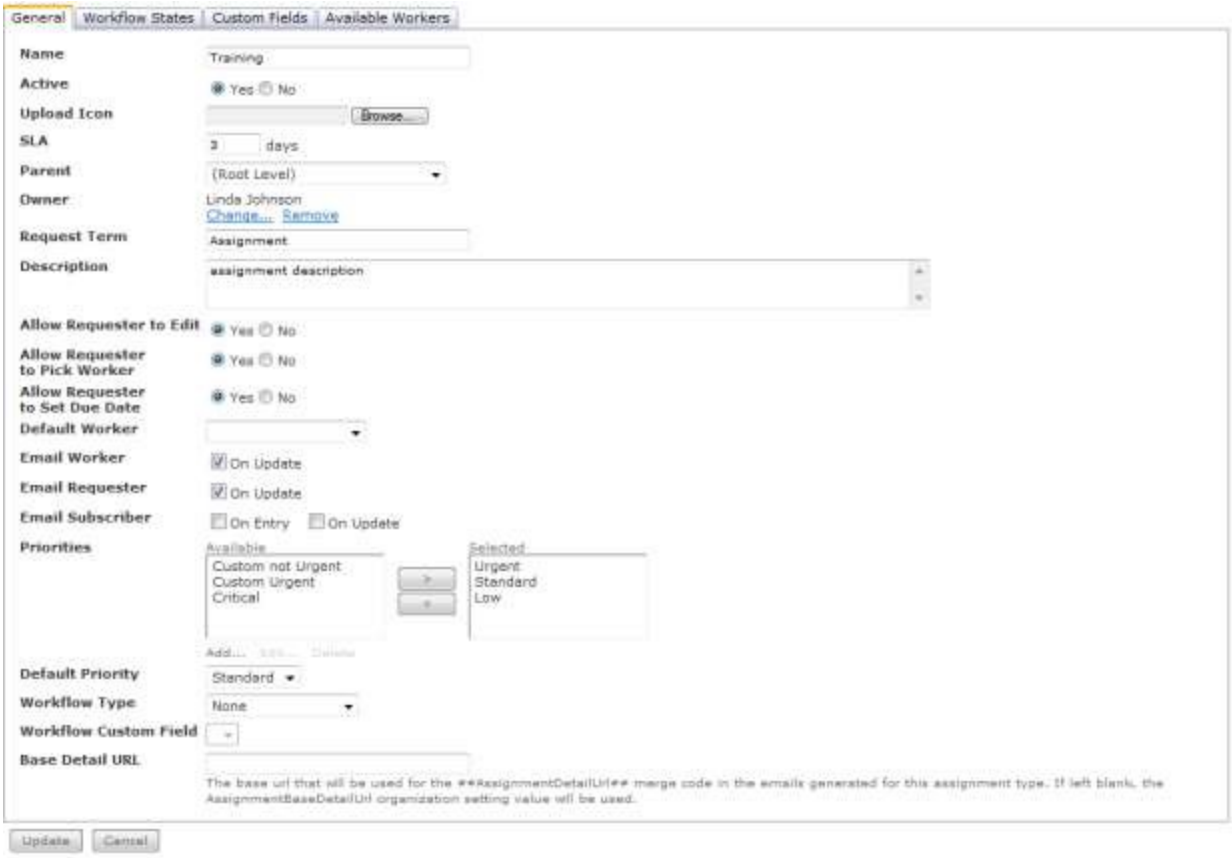
Create an Assignment Type

1. From the **Assignment** menu, click the **Assignment Types** option.

2. Click the **Add Assignment** icon. While it is natural to want to complete the tabs in the order in which they appear you may want to add the Available Workers and Custom Fields first.

General | Workflow States | Custom Fields | Available Workers

3. Complete the **General** tab fields, as desired.

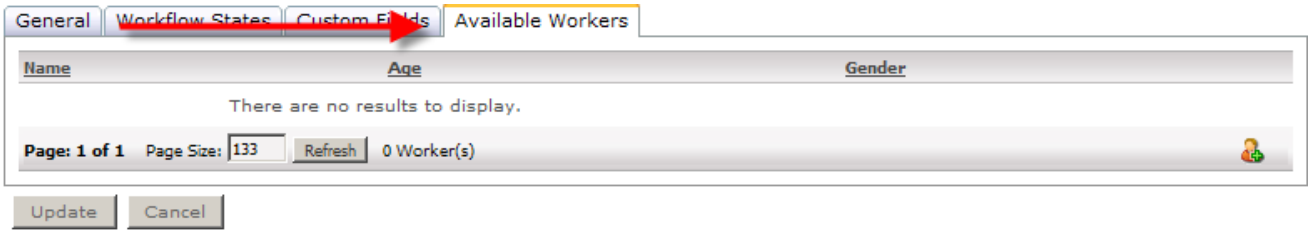


- **Name** – Enter the name for the Assignment Type.
- **Active** – Select the **Yes** or **No** radio buttons. For Assignments no longer used but would like to retain history, make the assignment inactive.
- **Upload Icon** – Click the **Browse** button to upload an image to associate with the assignment type.
- **SLA (Service Level Agreement)** – Enter the number of days the assignment should be complete.
- **Parent** – This is the parent assignment. Select the drop-down to move the assignment to a different parent assignment or make it a root level assignment.
- **Owner** – The default owner is the user who creates the assignment type. Click the ***Change*** link to select a different owner from the database.
- **Request Term** – Enter the request term. This caption shows on the Assignment Entry.

- **Description** – Enter the description for this assignment.
- **Allows Requestor to Edit** – Select the **Yes** radio button to allow the requestor to edit the assignment.
- **Allow Requestor to Pick Worker** – Select the **Yes** radio button to allow the requestor to select the worker. Select the **No** radio button if you plan to pre-assign the worker.
- **Allow Requestor to Set Due Date** – Select the **Yes** radio button to allow the requestor to select a due date. If you set SLA on the assignment type, the due date defaults to today plus SLA days, but the user is able to change the date. If this set to No (default), then it uses the SLA days to calculate the due date.
- **Default Worker** – Use this option to set the default worker. Add workers on the **Available Workers** tab.
- **Email Worker (On Update)** – Select this check box to send an email to the worker when the assignment type is changed. This includes when an assignment is closed. If you do not check this box, Arena still emails the worker when a user creates an assignment for the assignment type.
- **Email Requestor (On Update)** – Select this check box to send an email to the requestor when the assignment is changed. If you do not select this check box, Arena still emails the requestor when a user creates an assignment for the assignment type. If the requestor is the same person who updates the assignment, Arena does not send an email. An update is considered any change to an active assignment such as adding notes or changing the state of an assignment workflow.
- **Email Subscriber** – Select the **On Entry** check box to send an email to subscriber(s) of the Assignment Type when a user creates a new assignment for this Assignment type. Check the On Update box to send an email to the subscriber(s) of the Assignment Type when a user or worker updates an assignment for this Assignment Type.
- **Priorities** – In the Available box, select the priorities to use with the Assignment Type. Then click the **Select** > icon to add priorities to the Selected box. Click the ***Add*** link to create more priorities.
- **Default Priority** – Select the default priority for new assignments for the Assignment Entry.
- **Workflow Type** – In order to initiate an Assignment Workflow from the **Person Detail** page or a Calling Campaign, you first need to add the Person custom field on the **Custom Fields** tab, save the Assignment, then edit the Assignment Type and select a Workflow Type on the **Assignment General** tab.
- **Workflow Custom Field** – If using Assignment Workflow, select a Workflow Custom Field that you created on the **Custom Fields** tab. One common option is to add the Person Type custom field in order to start an assignment from the person detail page.
- **Base Detail URL** – This is used for the ##AssignmentDetailUrl## merge code in the emails generated for this assignment type. If left blank, the AssignmentBaseDetailUrl organization setting value is used.

4. Click the **Available Workers** tab.

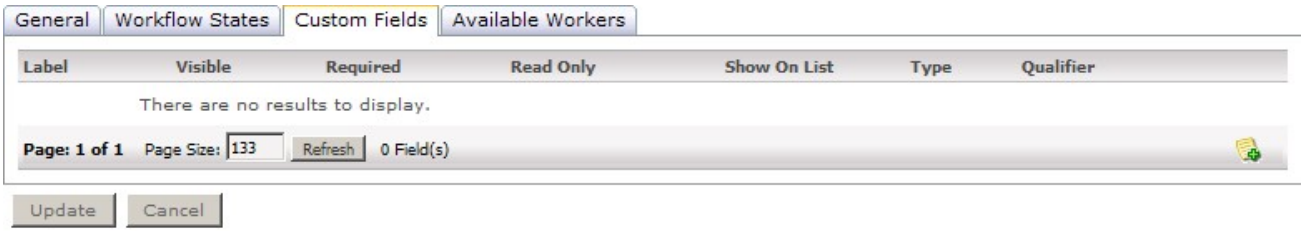
5. Click the **Add New Worker** icon to select the available workers for this assignment.



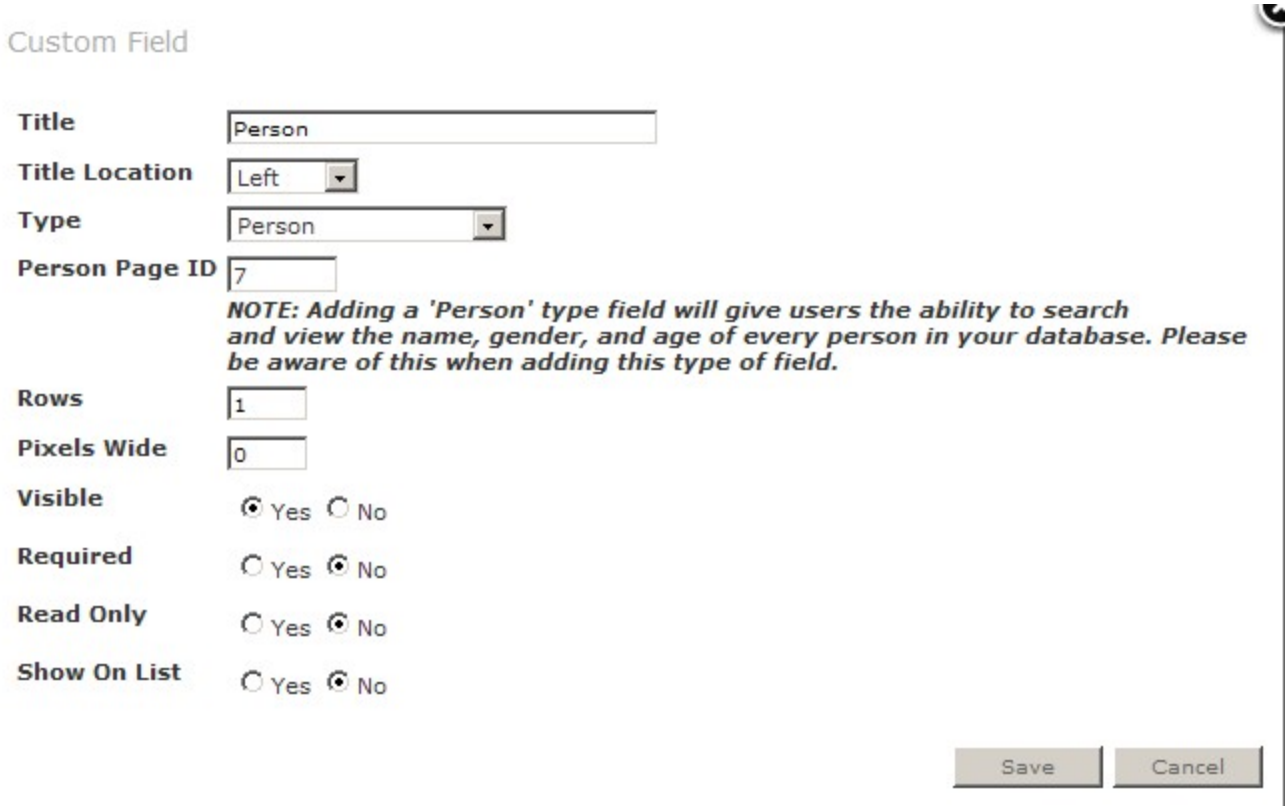
6. Add Workers.

7. Select the **Custom Fields** tab to create custom fields for this Assignment Type. If using Workflow States, the Person Type, value 7, is required.

8. Click the **Add New Field** icon to create a new custom field.



9. Complete **Field**, as desired. Some Types require additional setup information.



Title – Enter a name for this custom field.

Title Location – Select the location where the title should display.

Type – Select the desired custom field type. Some types require additional setup information. Below are the available Types:

- **Address** – This allows the requestor to enter in an address.
- **Area** – This allows the requestor to select an Area. See Areas in this help file.
- **Check Box** – This allows the requestor to make multiple selections from a single list. Enter each item, separated by a comma.
- **Custom Query** – This is where you can enter a SQL statement.
- **Date** – This allows the requestor to enter a date in **MMDDYYYY** format.
- **Document** – This allows the requestor to upload a document.
- **Drop-down List** – This allows the requestor to make a single selection for a drop-down list. Enter items, separated by a comma.
- **Lookup Type** – This allows the requestor to select from an existing list of items from Lookups (See your Arena Administrator).
- **Person** – This allows the requestor to select a person from the database. The default Page ID is 7.
- **Phone Number** – This allows the requestor to enter in a phone number. Arena formats 10-digit phone numbers. You can enter international numbers.
- **Radio List** – This allows the requestor to select a single item from several choices. Enter the items in a list form.
- **Static HTML Content** – This allows the Assignment creator the ability to enter HTML Content.
- **Textbox** – This allows the requestor to enter a string of text.

Rows – Enter the number of rows to use for this field. It is not necessary to change from the default.

Pixels Wide – Enter the number of pixels for this custom field. It is not necessary to change from the default.

Visible – Select the **Yes** radio button to display this custom field on the **Assignment Entry** page.

Required – Select the **Yes** radio button to require this custom field to be complete.

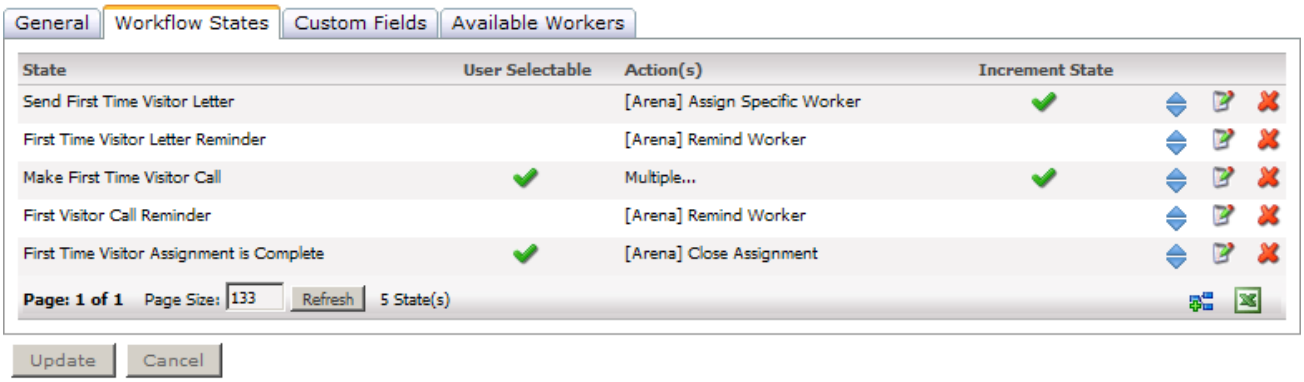
Read Only – Select the **Yes** radio button if this custom field is for view purpose only; no action is required.

Show on List – Select the **Yes** radio button for this custom field to be available in Lists.

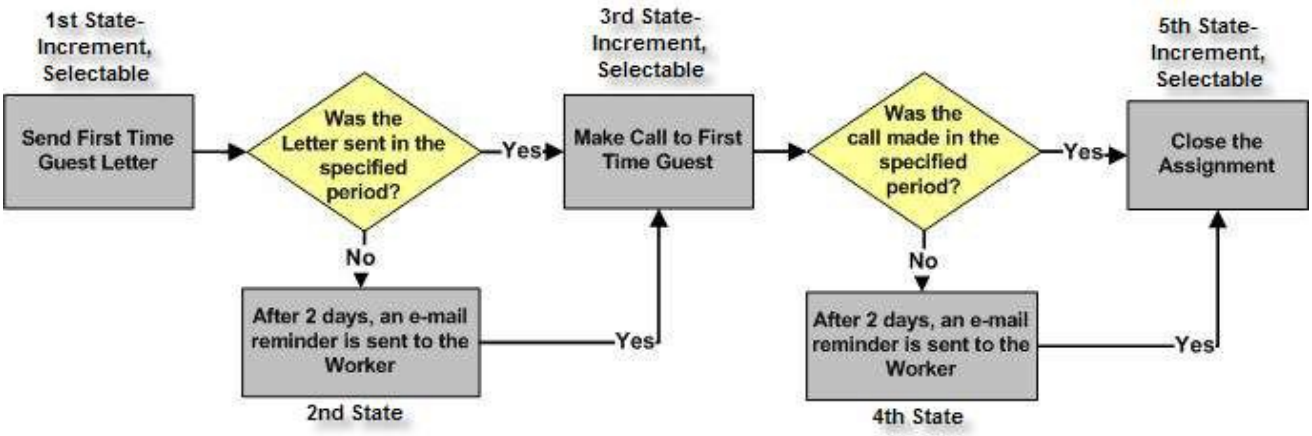
10. Click the **Save** button.

11. Select the **Workflow States** tab. Workflow states allow you to create a process for this

Assignment Type.



12. Workflows will vary for your organization. In this example the Workflow States for First Time Visitors are: (1) Sending a First Time Visitor letter, (2) A reminder email when the State is not changed within x days, (3) Making a First Time Visitor Phone Call, (4) A reminder email when the State is not changed within x days, (5) Closing the Assignment.



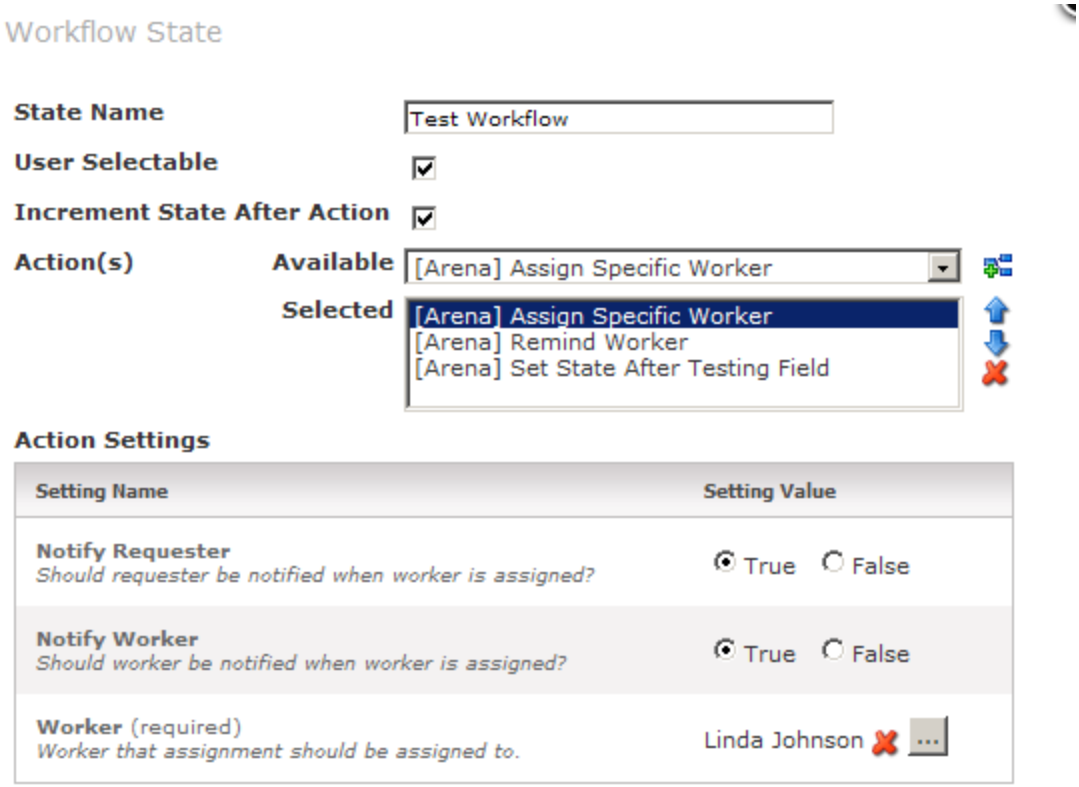
13. Click the **Add New State** icon to add a Workflow State.

14. Enter a **Name** for this state.

15. Select the **User Selectable** check box, if desired, to indicate if the state is selectable by the user. If checked, the state displays in the State drop down box. If not, it can only be selected by Arena through a state action or if the state was incremented from a previous state.

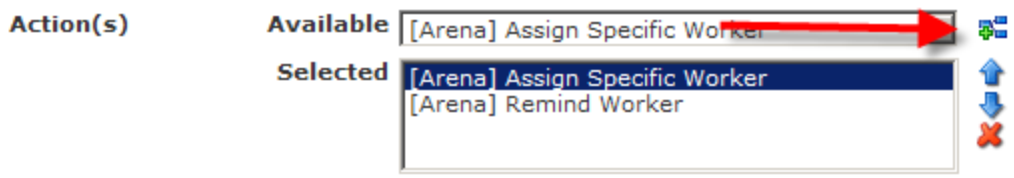
16. Select the **Increment State After Action** check box, if desired, to indicate if the Assignment should increment to the next state automatically after successfully completing the previous state.

17. Select the **Action(s)** from the available drop-down to add to this assignment. You can include more than one Action for a State.

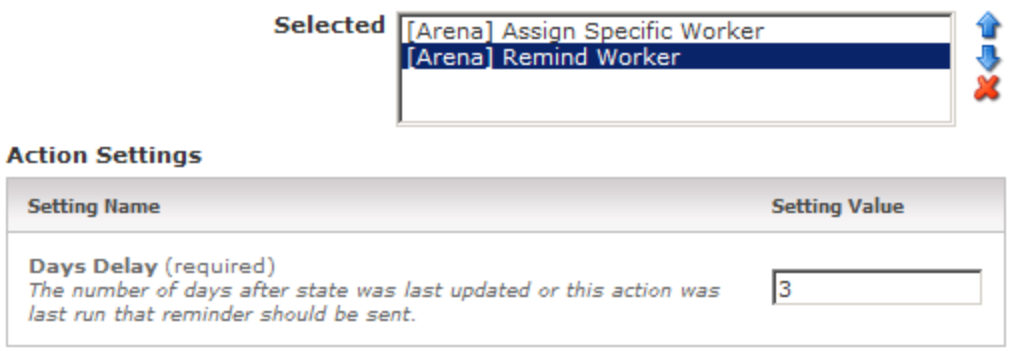


- **Assign Specific Worker** – Assigns to the worker what you configure for this action.
- **Assign Worker** – Assigns to the default worker that you configure on the assignment type.
- **Assign Worker (Load Balanced)** – Assigns to the worker that has the fewest active assignments of the current type. This option is only available when using Workflow.
- **Assign Worker (Round Robin)** – Rotates assignment between all the workers for the assignment type. This option is only available when using Workflow.
- **Close Assignment** – Allows you to set the email notification to notify the requestor when the assignment is closed.
- **Remind Worker** – Allows you to set the number of days after a state was last updated or this action was last run. Arena sends a reminder email to the worker.
- **Send Assignment Reminder Email** – Allows you to create an email and set the dates prior and after the due date.
- **Send Email** – Allows you to set the email notifications options for when a worker is emailed.
- **Set State** – Allows you to set the new state of an assignment.
- **Set State After Number Days** – Allows you to set the state after "x" days when a state was last updated.
- **Set State after Testing Field** – Allows you to set a state based upon a pre-determined value to decide what to do next.

18. Click the **Add Workflow** icon to add the workflow state to the Selected states.



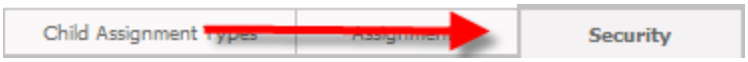
19. Based on the Workflow state selected, select or enter the **Action Settings** for the workflow state.



20. Click the **Save** button.

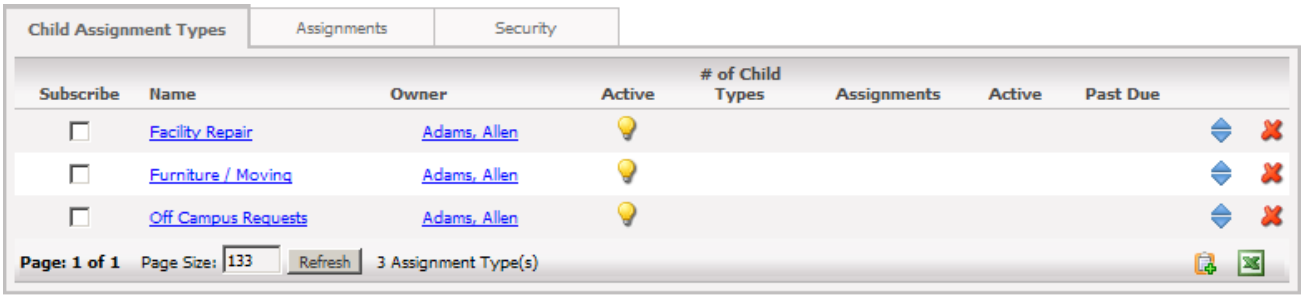
21. Repeat steps 1 through 7 for additional workflow states for this Assignment Type.

22. Set security for this Assignment Type, similar to Tags. This Assignment Type is now available on the **Assignment Entry** page. Permissions are automatically set at the parent level for the user who creates the Assignment Type. If you create an assignment type on the child level, it inherits parent level permissions. See your Arena Administrator if the **Security** tab is not available.



Child Assignment Types

The **Child Assignment Types** tab displays any assignment types you create under the parent assignment type.



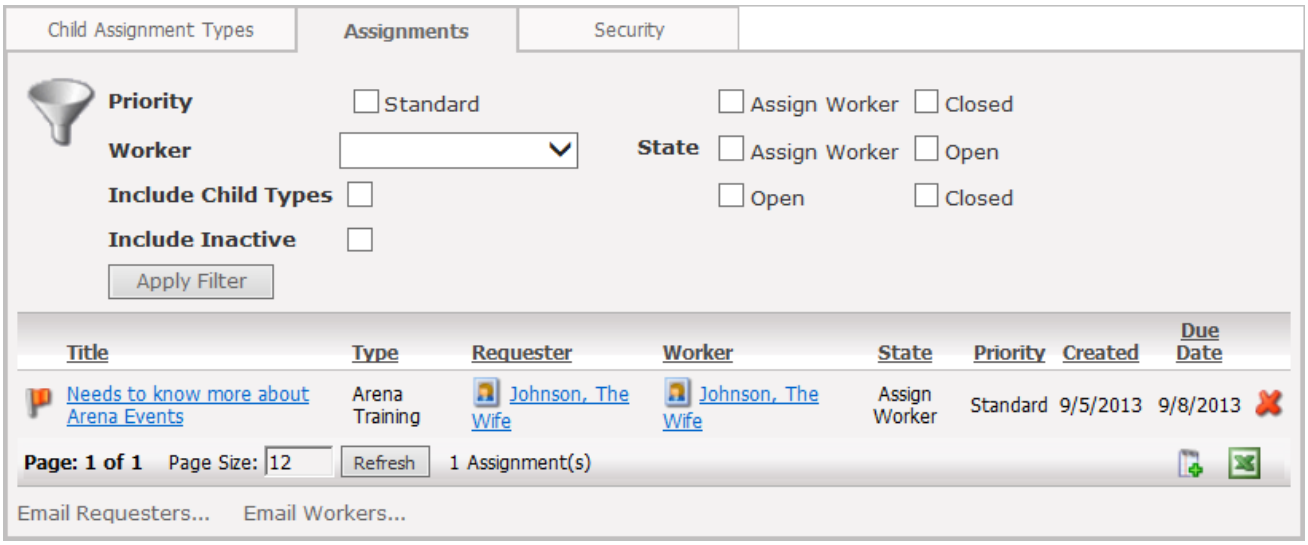
- **Subscribe** – Select the **Subscribe** check box to add a link to your Arena homepage for any of these Assignment Types. If desired, the Subscribers can receive an email when users

create or update the Assignment Type.

- **Name** – This is the name of the Assignment. Click the ***Name*** link to open the Assignment Type.
- **Owner** – This is the owner of the Assignment. Hover over the person's name to display the person pop-up.
- **Active** – This denotes if the Assignment is **Active** or **Inactive** .
- **# of Child Types** – This denotes the current number of all child Assignments associated with the Assignment Type.
- **Assignments** – This is the total number of Assignments, including all child Assignments. This number includes open, closed and inactive assignments.
- **Active** – This is the number of current active Assignments; that are still open. The number includes all statuses except for closed.
- **Past Due** – This is the number of Assignments that are past due, based on the Service Level Agreement (SLA) date or date or Due Date.
- **Delete** icon – Click the **Delete** icon to delete the Assignment Type. This is available when no Assignments exist.
- **Add** icon – Click the **Add** icon to create a new top level Assignment Type.
- **Export to Excel** icon – Click the **Export to Excel** icon to export the selected Assignment Types to an Excel spreadsheet.

Assignments Tab

The **Assignments** tab gives you the ability to filter through the statuses of current assignments.

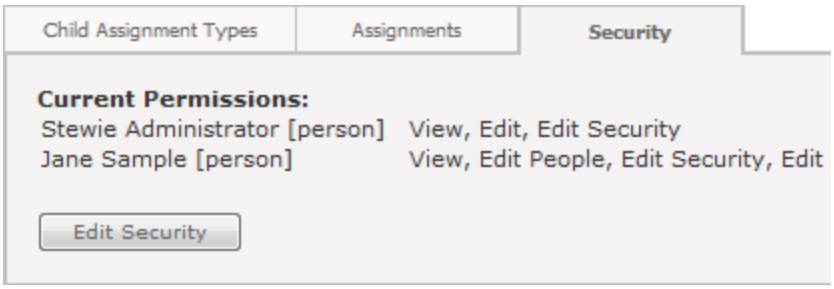


- **Filters** – Use the filters to display the desired assignments.
- **Flags** – The colored flags indicate if the Assignment is current, almost late or late, based on the SLA. Green indicates the assignment is current. Yellow flag indicates the assignment is almost late. The red flag indicates the assignment is late.

- **Title** – This is the title of the Assignment.
- **Requester** – This is who made the request.
- **Worker** – This is whom is responsible for this Assignment.
- **State** – This is the state of the Assignment, if using Workflow States.
- **Priority** – This is the current Assignment status.
- **Created** – This is the date the Assignment was created.
- **Due Date** – This is when the Assignment is due.
- Additional columns display, if you are using Custom Fields and "Show on List" is enabled on the field.
- **Delete** Icon – Click the **Delete** icon to delete an Assignment. Users need at least edit rights.
- **Email Requestors** – This link allows you to create an email Communication to all requestors.
- **Email Workers** – This link allows you to create an email Communication to all workers.
- The **Add Assignment** icon allows you to add an Assignment from this page, taking you to the **Assignment Entry** page.

Assignment Security Tab

Use this page, to set security permissions for each Assignment Type.



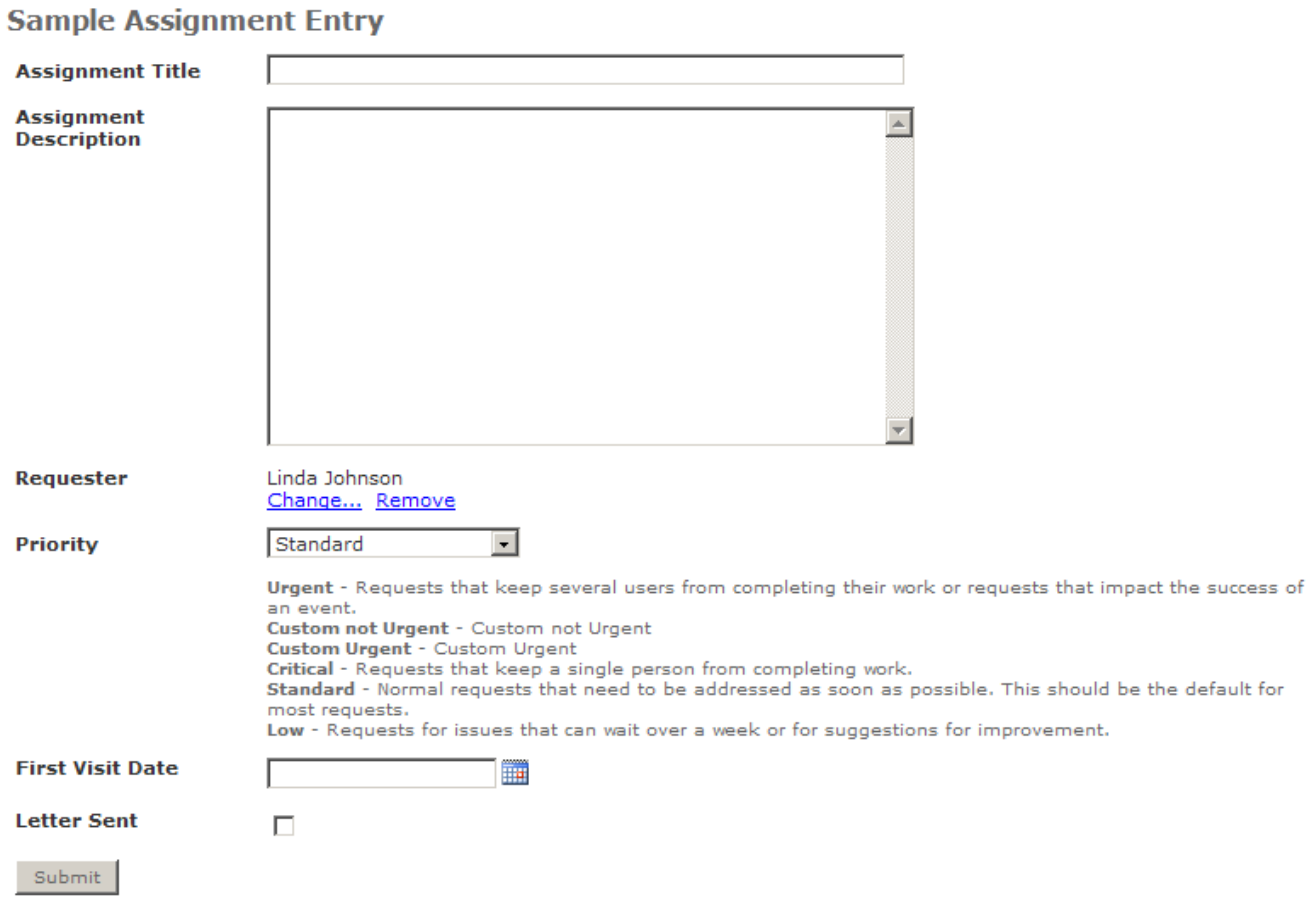
Assignment Entry

The assignment entry page allows users to submit assignment requests. Due to the customization options, Assignment Entry pages may vary. The below example provides you with an example of several Custom Fields.

Create a New Assignment Entry

1. Select the Assignment Type from the **Assignment Entry** page.

2. Complete fields, as needed. Due to the ability to use Workflow States and Custom Fields, your **Assignment Entry** page may vary.



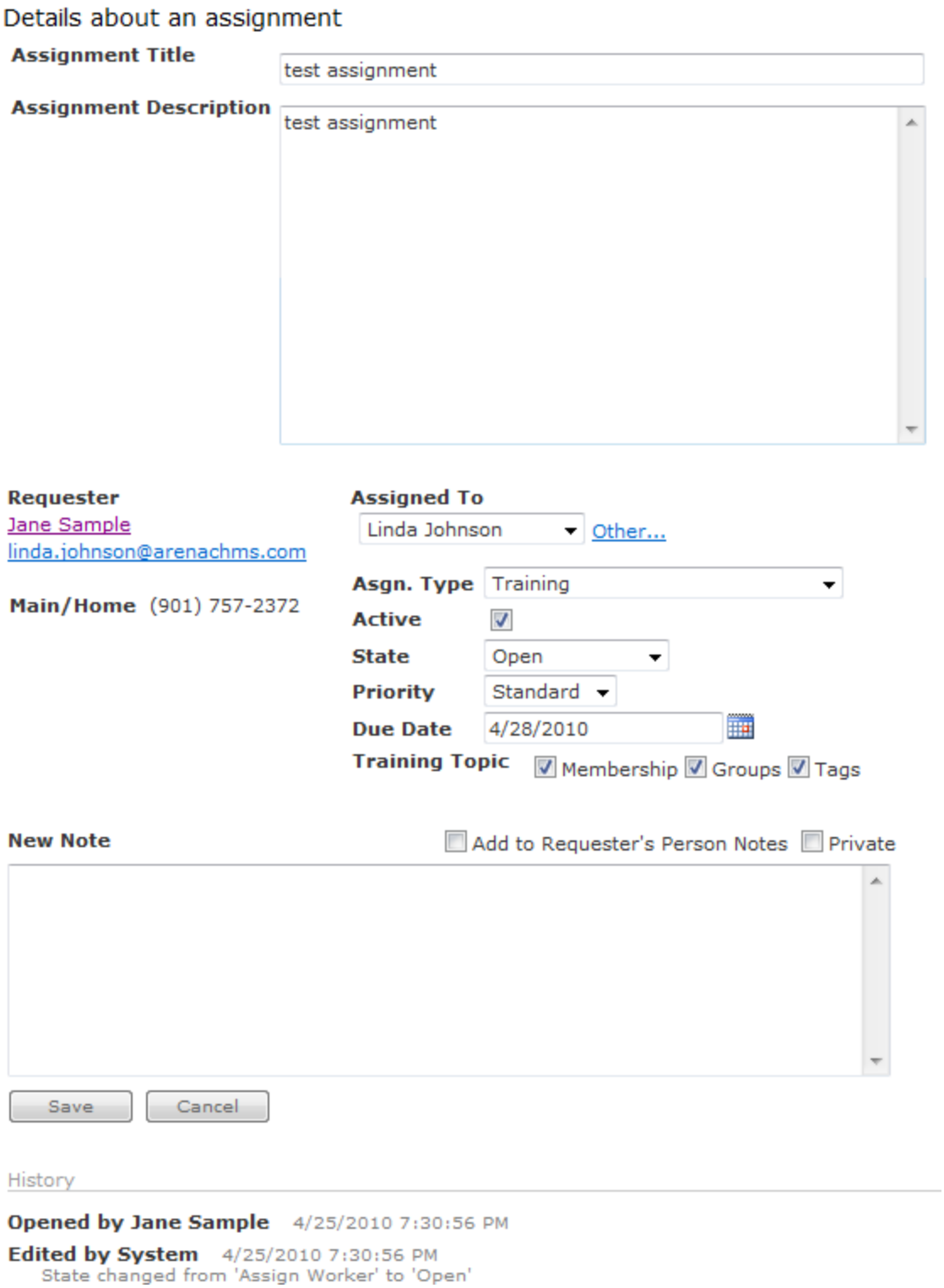
3. Click the **Submit** button. An email is sent to the Worker.

Update an Assignment

1. Click the link from the Assignment email.

2. Click the ***Edit Details*** link. Fields may vary. If you choose the option to email the requestor when users make changes, an email is also sent when closing the assignment.

3. Make the appropriate changes.



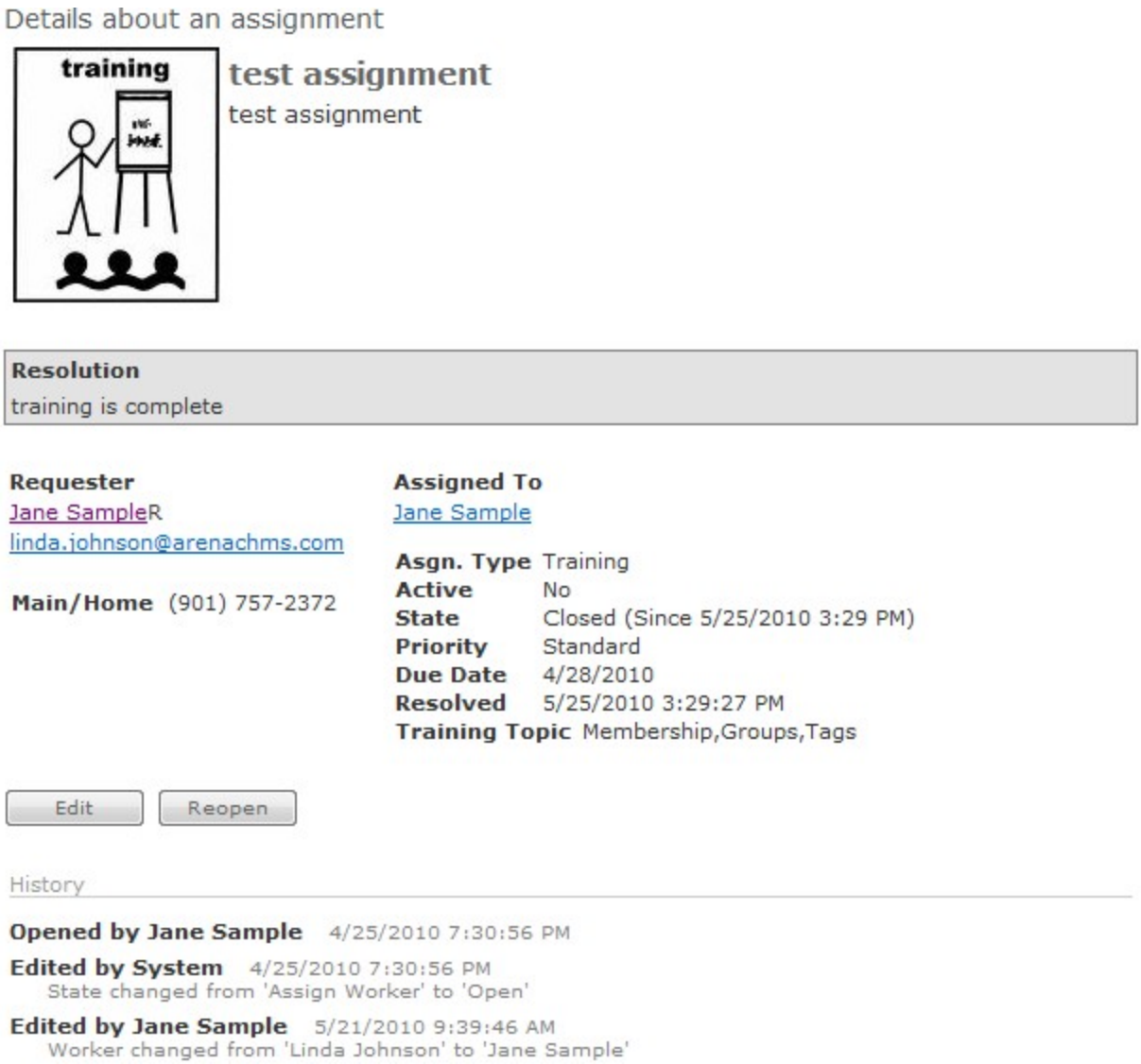
4. Click the **Save** button.

Close an Assignment

1. Click the link from the Assignment email or from the desktop link.

2. Click the **Edit** button to make any updates, or click the **Close** button if no changes are necessary.

3. Enter the **Resolution** for the assignment.



Workflow

Assignment Workflows is an option to create an Assignment with multiple steps (states). Users have the option to start an Assignment Workflow on the **Person Detail** or the **Assignment Entry** page.

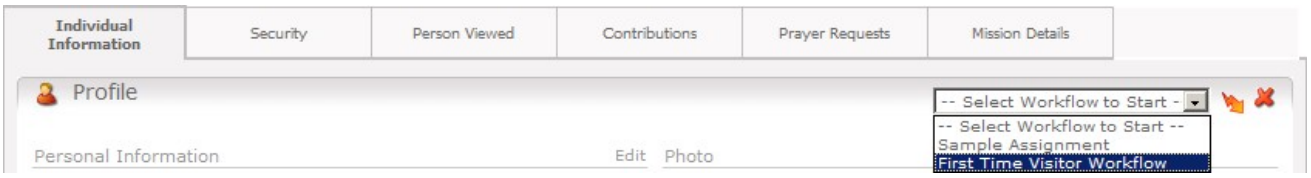
Being that Workflows vary, the example to follow includes the below States:

- Send a First Time Visitor letter by a Specific Worker.
- Send a reminder email to the Specific Worker when the State is not changed within 2 days.
- Make a First Time Visitor Call by a Specific Worker.
- Send a reminder email to the Specific Worker when the State is not changed within 2 days.

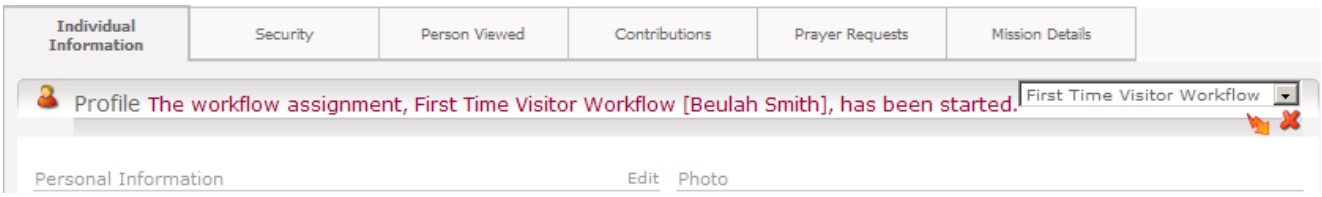
- Close the Assignment.

Start a Workflow

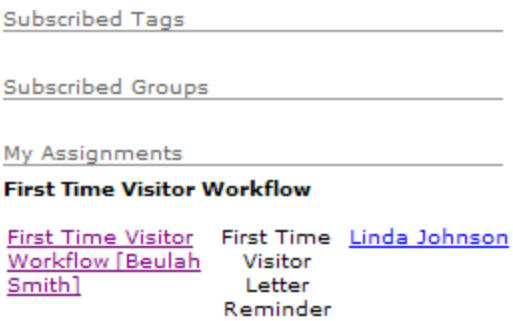
1. Go to the **Person Detail** page for whom you want to create an assignment.
2. Select the **Workflow (Assignment)** you would like to start for this person. This is not the person being assigned the Assignment, but the person for whom the Assignment is being done.



3. Click the **Start Workflow** icon. The page refreshes and Arena confirms the Workflow has begun.

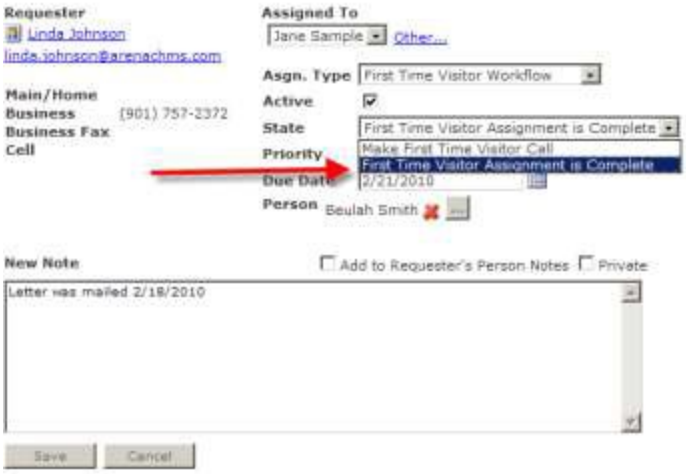


The worker selects the Assignment.



4. Click the **Edit** button, once you are ready to make a State change.

5. Change the **States**, as needed for this Workflow.



6. Click the **Save** button. The worker for the next State receives an email. Repeat steps 4-7 until the Workflow is Complete.

Missions

Missions are a way to track the details involving Mission Trips. Arena can track the location, schedule, team, local facilitators, supporters, travelers, and even a participant's financial ability to pay for the trip.

What you need:

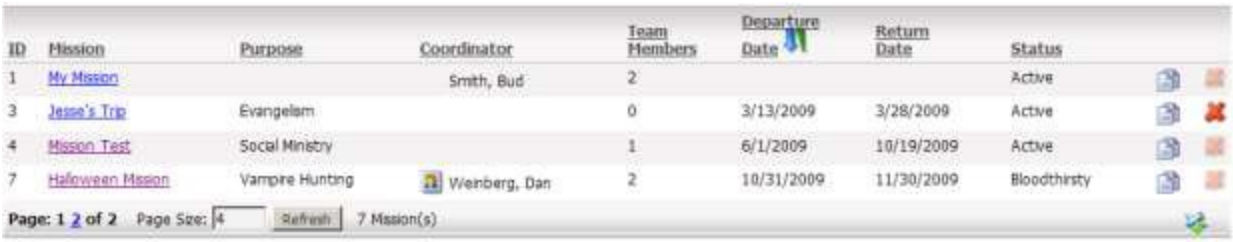
- Setup the Payment Gateway, if needed. See your Arena Administrator.
- Create the appropriate Fund for this Mission Trip.
- Create the Mission Trip.
- Create at least one Contribution Fund in order to create a Mission Trip. Refer to the Fund Management section in Contributions.
- Review your organization's Mission Team approval process for allowing additional payments to be made towards a Team Member.

Mission List

The Mission List shows the Mission Trip name, the departure and return dates, a **Delete** icon, and an **Add** icon.

Inactive mission trips do not display by default. Click the **Show All** check box in the upper right-hand corner to display inactive and active mission trips.

From this page, you can do the following:



ID	Mission	Purpose	Coordinator	Team Members	Departure Date	Return Date	Status
1	My Mission		Smith, Bud	2			Active
3	Jesse's Trip	Evangelism		0	3/13/2009	3/28/2009	Active
4	Mission Test	Social Ministry		1	6/1/2009	10/19/2009	Active
7	Halloween Mission	Vampire Hunting	Weinberg, Dan	2	10/31/2009	11/30/2009	Bloodthirsty

Page: 1 2 of 2 Page Size: 4 Refresh 7 Mission(s)

- Click the ***Mission*** link to edit the mission trip.
- Click the **Add New Mission Trip** icon to add a new mission trip. If no missions are currently in the list, click the ***Add*** link.

- Click the **Copy** icon to copy a mission trip. The copies include Custom Fields, Communications, Packing Lists, Documents, and General Information from the original Mission Trip.
- Click the **Delete** icon to delete a Mission Trip.

Create a Mission Trip

1. Click the **Add New Mission Trip** icon to add a new Mission. If no missions are currently in the list, click the ***Add*** link.
2. Click the **Edit** button.
3. Enter details for this Mission Trip.

Mission Information

Trip Name	Mexico Mission Trip
Country	Mexico
Region	Northern
City	Reynosa
Departure Date	12/1/2016
Return Date	12/10/2016
Trip Purpose	Teaching
Trip Status	Active
Trip Coordinator	
Description	

Registration Setup

Min Team Size	0
Max Team Size	20
Min Age	0
Deposit 1 Amount	$0.00
Cost Per Team Member	$2,000.00
Registration Deadline	12/10/2016
Deposit 1 Due on Registration Deadline?	Yes
Summary	
Details	
Participant Validation Type	Type
Mission Photo	

Financial Setup

Beginning Balance	$0.00
CN Fund	Missions 2016
GL Project Code	0

- **Trip Name** – Enter the name of the Mission Trip.
- **Country** – Choose the destination country of the trip from the drop-down menu. If the country is not in the list, click the **Add New Country** icon to add a new Country.
- **Region** – Choose the country's region in the drop-down menu. If the desired region is not in

the list, click the **Add New Region** icon to add a new Region.

- **City** – Choose the destination city from the drop-down menu. If the desired city is not in the list, click the **Add New City** icon to add a new City.
- **Departure Date** – Click the **Calendar** icon to choose the date the trip starts. To hide a trip from "public" view, set the "Departure Date" to a prior date. To leave a trip online to collect donations beyond the trip date, set the "Departure Date" one day after the last day donations are accepted.
- **Return Date** – Click the **Calendar** icon to choose the date the trip members return.
- **Trip Purpose** – Choose the reason for the trip from the drop-down menu. If the desired reason is not in the list, click the **Add New Purpose** icon to add a new Purpose. Each Trip Purpose type has a 50-character limit. See your Arena Administrator to set security by Trip Purpose.
- **Trip Status** – Choose a trip status. Active and inactive are default statuses.
- **Trip Coordinator** – Use the Popup Person Search window to search and select the name of the coordinator of the trip. This person is the "Leader" of the trip, but is not necessarily a Team Member.
- **Description** – Enter a description of the Trip, including any itinerary.
- **Min Team Size** – Enter the minimum number of people for the Team.
- **Max Team Size** – Enter the maximum number of people for the Team. To prevent people from registering themselves to a trip, set the "Min Team Size" value greater than zero, and the "Max Team Size" value smaller than the number of team members currently enrolled for a trip (e.g., enroll at least one person and set Max Team Size to 1. You can add team members even if you have reached the "Max Team Size.")
- **Min Age** – Enter the minimum age a Team Member can be in order to go on the trip.
- **Deposit Amount** – Enter the amount (if applicable) that each Team Member must provide up front to go on the trip.
- **Cost Per Team Member** – Enter the total amount (if applicable) each Team Member must provide to go on the trip. You can use commas and decimals in any cost fields associated with Missions. Any other character does not display.
- **Registration Deadline** – Click the **Calendar** icon to choose the last day a Team Member can register to go on the trip. This field is required.
- **Deposit Due on Registration Deadline** – Select this check box if deposit is due at registration.
- **Registration Deposit 1 Deadline** – Enter the due date for the first deposit, if applicable.

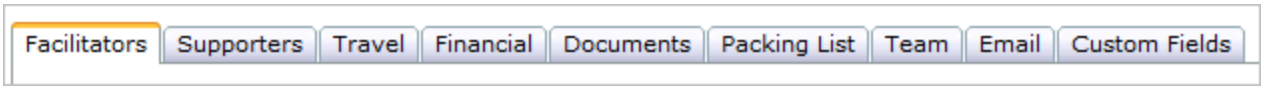
- **Registration Deposit 1** – Enter the amount of the first deposit.
- **Registration Deposit 2 Deadline** – Enter the due date for the second deposit, if applicable.
- **Registration Deposit 2** – Enter the amount of the second deposit. Arena can automatically send reminder emails, using the deadline dates entered. See your Arena Administrator.
- **Summary** - The Summary field provides for a minimal summary of the mission trip that will be viewed and searchable from the Mission search module on the Member website.
- **Details** - The Details field provides for more extensive detailed description of the mission trip that will be viewed and searchable from the Mission search module on the Member website.
- **Participant Validation Type** - This field allows two settings that determine how the Member website works when contributing to a mission trip on behalf of one of the team members. By selecting "Dropdown", a list of the approved team members will display for selection. By selecting "Type", you will have to type in the participant's name, and click verify to make sure the person is going on the trip. This is preferable when you are serving in a country not friendly to Christian ministry.
- **Mission Photo** - A photo representing the trip can be uploaded to this field. It would be displayed with the mission information on the Member website.
- **Beginning Balance** – Enter the beginning balance (if applicable).
- **CN Fund** – Choose the Contribution Fund from the drop-down menu. If the desired Fund does not show in the list, you need to add the Fund on the **Fund Management** page under Contributions.
- **GL Project Code** – Enter the GL expense account designated for the mission trip, if applicable.
- **Trip Contributors** – List of Contributors who have contributed to the Mission trip through Contributions.

4. Click the **Save** button.

Now you can enter other details for this Mission Trip, using the tabs below the Mission Trip details.

Mission Tabs

Editing or creating a new Mission Trip displays the **Mission Details** page. The details display with a series of tabs along the bottom containing additional information about the trip. When creating a new trip, all tabs display after you save the details. Click the ***Edit*** link at the upper right to begin editing the Mission Details. The figure below shows the Mission Trip details and the tabs, respectively.



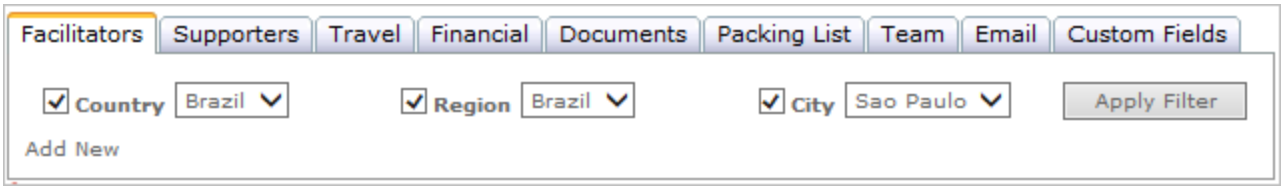
- **Facilitators** – People who are assisting with the Mission Trip at the trip's destination. These records are not stored in the Arena DB.
- **Supporters** – Use the Popup Person Search window to search and select existing records who are Mission Trip Supporters.
- **Travel** – This is a simple expense/income register for the trip such as ground transportation and hotel accommodations.
- **Financial** – This is where you can track trip expenses and income, not incurred by the Team.
- **Documents** – You can upload associated documents such as a trip application form. Include a standard packing list as a Document and include with the email, and use Packing List to alert team members to bring unique items on this trip.
- **Packing List** – This is where to list items to bring on the trip.
- **Team** – The trip Team Members and Leaders list on this tab.
- **Email** – This is where you create a template for the email sent to registrants, once the person registers.
- **Custom Fields** – You can create custom fields to use during online registration.

Facilitators Tab

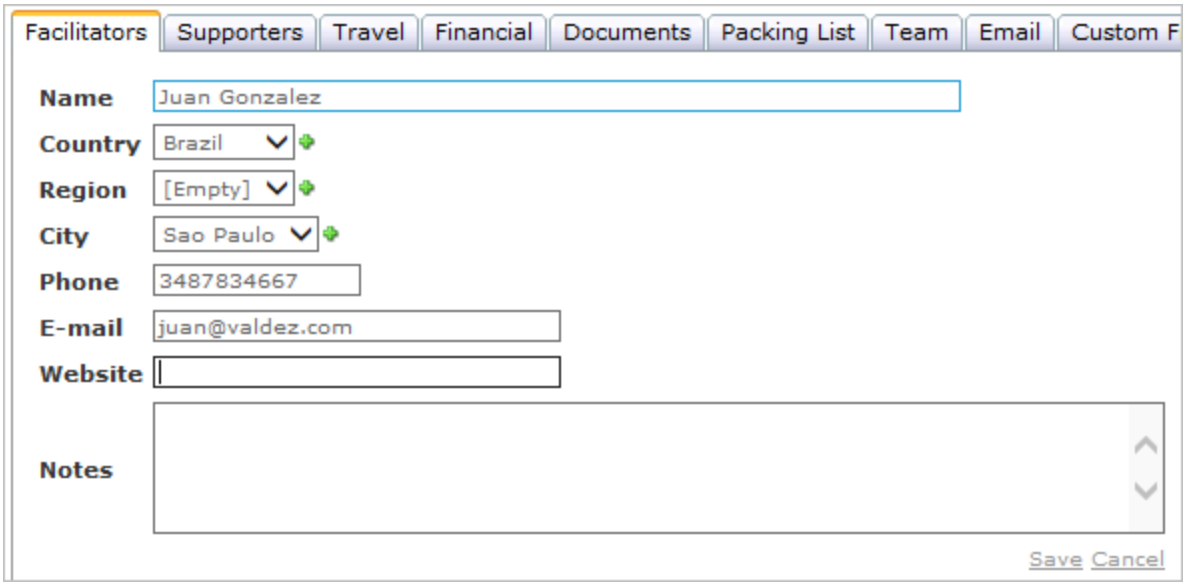
A Facilitator list displays each Facilitator's name, phone number, email address, website, country, region, and city. The **Delete** icon removes a facilitator from the list. Adding Facilitators does not add the person to the Arena database, therefore Facilitators are not searchable within Arena, nor can they be included in bulk emails.

Add a Facilitator

1. Click the ***Add New*** link.



2. Complete the fields.



- **Name** – Enter the name of the Facilitator you want to add.
- **Country** - Choose the country of the Facilitator from the drop-down menu. If the country is not in the list, click the **Add New Country** icon to add a new Country.
- **Region** - Choose the region of the Facilitator from the drop-down menu. If the region is not in the list, click the **Add New Region** icon to add a new Region.
- **City** – Choose the city of the Facilitator from the drop-down menu. If the city is not in the list, click the **Add New City** icon to add a new city.
- **Phone** – Enter the phone number of the Facilitator. You can enter and format international phone numbers. 10-digit phone numbers automatically format.
- **Email** – Enter the email address of the Facilitator.
- **Website** – Enter the website URL for the Facilitator.
- **Notes** – Enter any notes about this Facilitator.

3. Click the ***Save*** link when done.

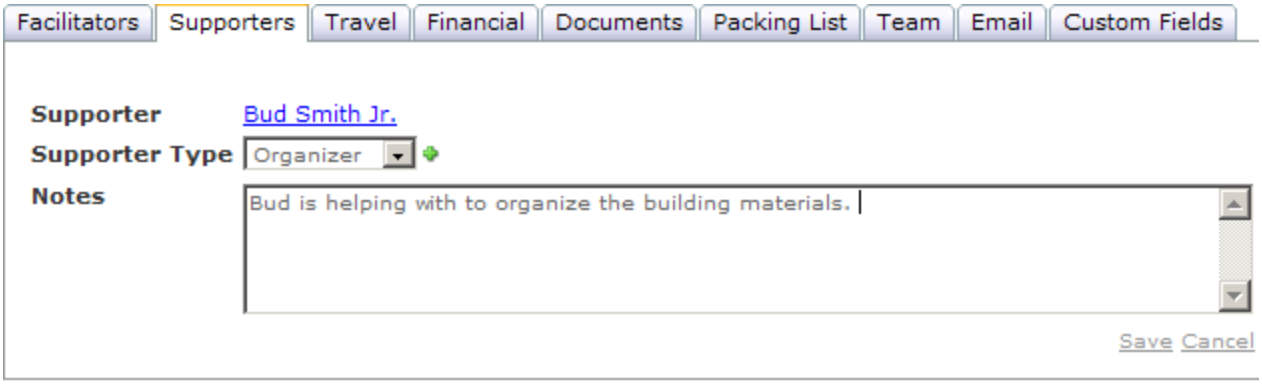
Supporters Tab

The Supporters list displays each supporter's name, address, phone number, email address, and the type of support the person provides. To add a Supporter, the record must first be in the database. If the person is not in the database, you can add them using the **Add New Family** option under the **Membership** menu. Financial Supporters entered through Contributions also display on this tab.

Add a Supporter

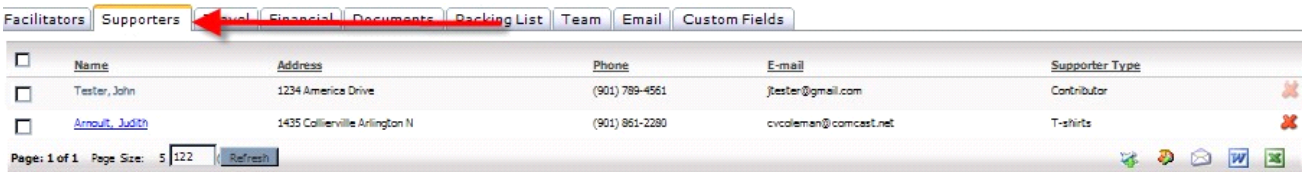
1. Click the ***Add New*** link.

2. Complete the fields, as needed.



- **Supporter** – Use the Popup Person search to add an existing record as a supporter.
- **Supporter Type** – Choose the type of support the supporter provides for the trip from the drop-down menu. If the type is not in the list, click the **Add New Supporter** icon to add a new Supporter Type.
- **Notes** – Enter any notes about this Supporter.

3. Click the **Save** button. The **Delete** icon removes a supporter from the list. Using the icons, you can add a new Supporter, Bulk Update the selected Supporters, email selected Supporters, produce labels for the selected Supporters or export the list of Supporters to Excel. Click the **Add New Supporter** icon to add a new Supporter. The screen below shows the **Supporter Details**.



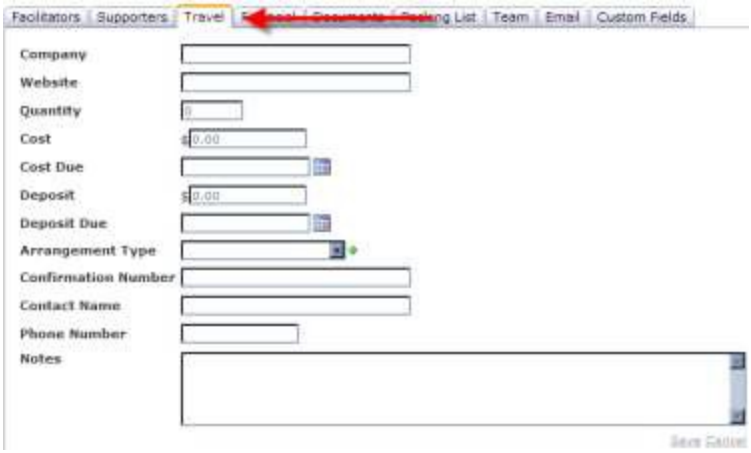
Travel Tab

The Travel list shows details relating to the travel arrangements for this trip. This includes information about the company, website, quantity of transportation modes, cost, cost due date, deposit, deposit due date, arrangement type, confirmation number, contact name, contact phone number for the arrangement and notes. The **Delete** icon removes an arrangement from the list. Click the **Add New Arrangement** icon to create a new Arrangement, which opens Travel details.

Add a New Travel Arrangement

1. Click the **Add New Arrangement** icon.

2. Complete the fields, as needed.



- **Company** – Enter the name of the company providing the travel arrangement.
- **Website** – Enter the website (if applicable) of the company.
- **Quantity** – Enter the quantity of the modes of transportation, such as a number of buses.
- **Cost** – Enter the cost of this Arrangement.
- **Cost Due** – Enter the date the total Cost is due.
- **Deposit** – Enter the deposit amount for the Mission trip.
- **Deposit Date** – Enter the date the Deposit is due.
- **Arrangement Type** – Choose an Arrangement Type from the drop-down menu. If the type is not in the list, click the **Add New Arrangement Type** icon to add a new Arrangement Type.
- **Confirmation Number** – Enter the confirmation number (if applicable) for this Arrangement.
- **Contact Name** – Enter the name of the contact at the company.
- **Phone Number** – Enter the phone number of the company contact.
- **Notes** – Enter any notes about this arrangement.

3. Click the **Save** button.

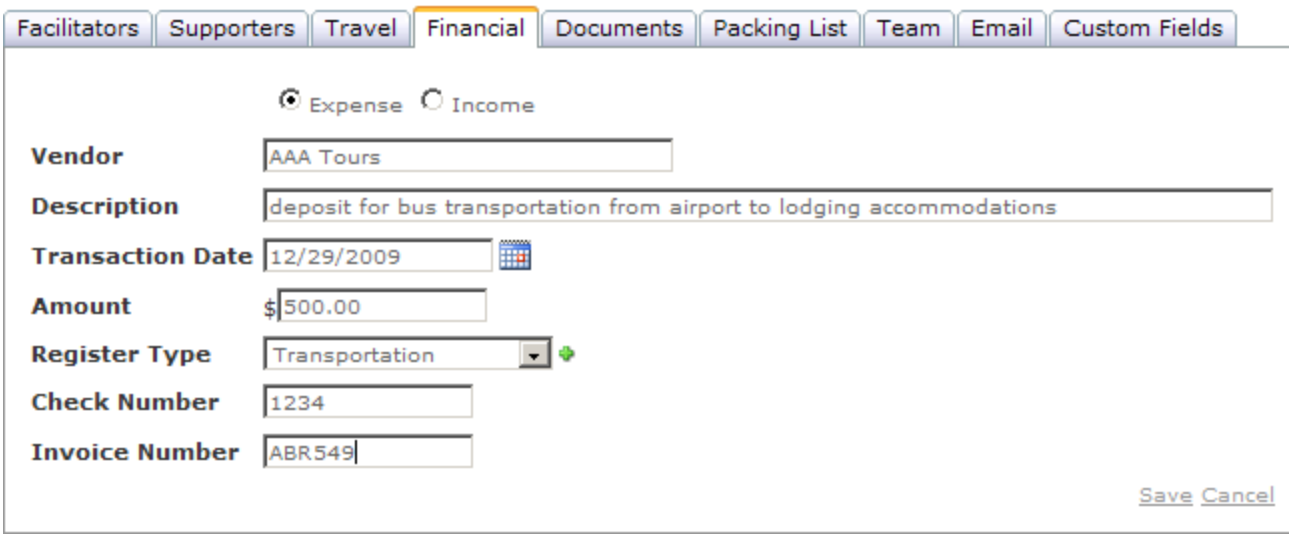
Financial Information Tab

Use this tab to track income and expenses for each mission trip.

Add Financial Information

1. Click the **Add New Register** icon.

2. Select the **Expense** or **Income** radio button.
3. Complete fields, as needed.



- **Vendor** – Enter the name of the vendor providing the item(s).
- **Transaction Date** – Click the **Calendar** icon to choose the date of the transaction.
- **Amount** – Enter the dollar value of the item.
- **Register Type** – Choose a register type from the drop-down menu. If the type is not in the list, click the **Add New Register Type** icon to add a new register type.
- **Check Number** – Enter the check number used to pay for the item.
- **Invoice Number** – Enter the invoice number for the item.

4. Click the ***Save*** link.

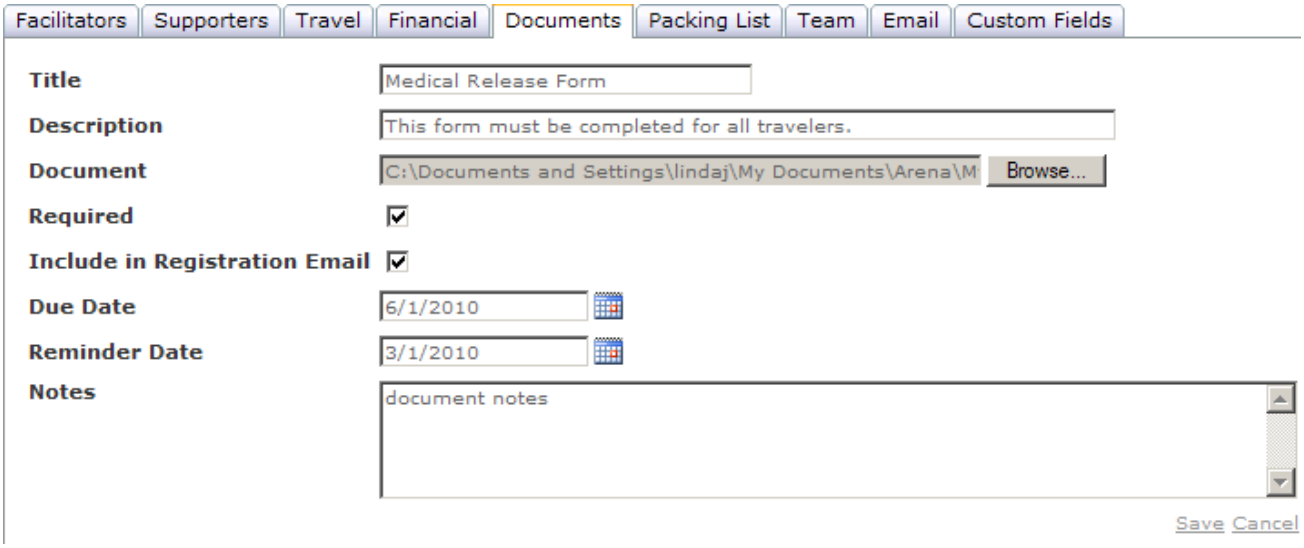
Documents Tab

Use this tab to manage documents associated with this mission trip. You can indicate documents to include with registration.

Add a New Document

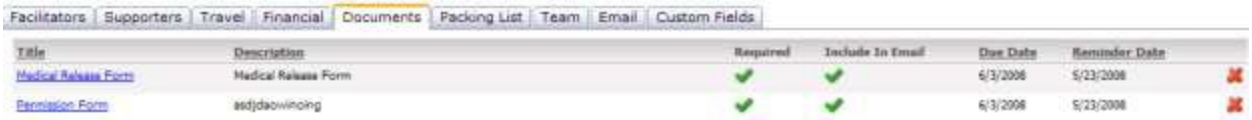
1. Click the ***Add New*** link.

2. Complete fields, as desired.



- **Title** – Enter the title of the document.
- **Description** – Enter a description for the document.
- **Document** – Click the **Browse** button to search for the document file. The file can be a .txt, .doc, .pdf, or image file.
- **Required** – Select the **Required** check box if this document is required to go on the trip.
- **Include in Registration Email** – Check the box if the document should be an attachment sent in the Registration Email for Team Members.
- **Due Date** – Click the **Calendar** icon to choose the date the document is due back from the trip registrant.
- **Reminder Date** – Click the **Calendar** icon to choose the date to send a reminder email to the approved trip registrant.
- **Notes** – Enter any notes pertaining to this document.

3. Click the ***Save*** link.



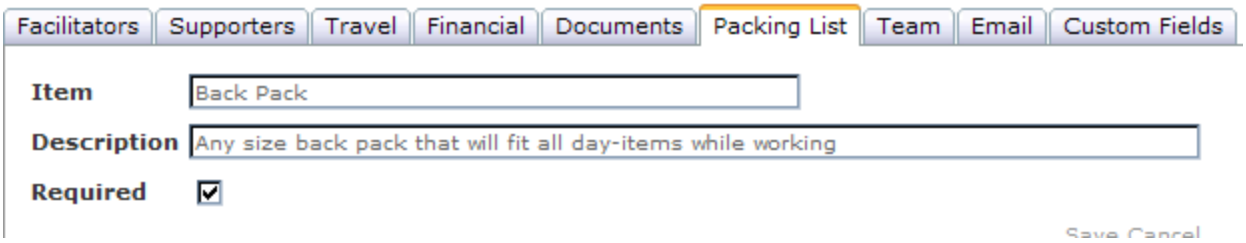
Packing List

Use this tab to track items to bring on the mission trip.

Add a Packing List Item

1. Click the ***Add New*** link.

2. Complete fields, as desired.



- **Item** – Enter the name of the object.
- **Description** – Enter a description of the item.
- **Required** – Select the **Required** check box if the item is required for the trip.

3. Click the ***Save*** link.

Team

The Team Member List displays the team member's name, their trip roles, if they have met any requirements to be a team member, their balance due, applied discounts, and Contributors. Click a team member's ***Name*** link to open the **Team Member Details** page for that member. Prospective mission trip participants can also register for a Mission Trip by using the Online Trip Registration module/control on your organization's Arena-managed website.

Add a Team Member

1. Click the ***Add New*** link if adding the first team member or click the **Add New Team Member** icon if adding additional team members.

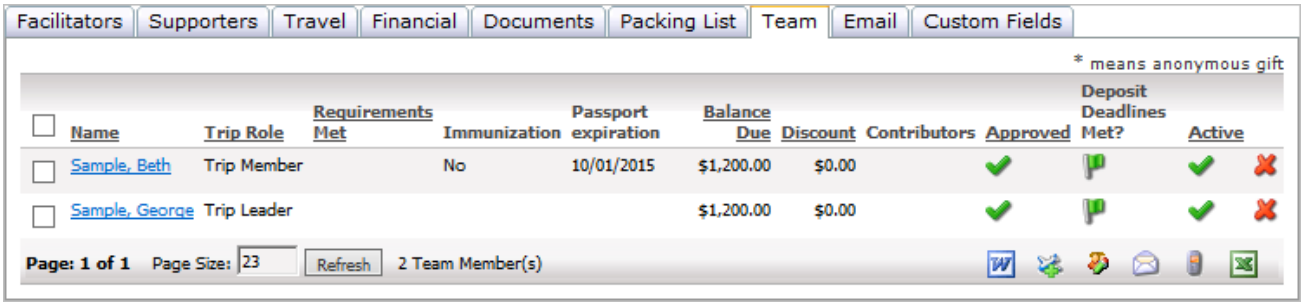
2. Complete fields, as needed.

- **Team Member** – Click the ***Change*** link to search for a current record. As you type the first and/or last name, the drop-down filters the available persons. Once the desired person displays in the list, click on that name to select it. Team Members must already exist in the Arena database.
- **Trip Role** – Select the role for this team member. To add a new role, click the **Add New Trip Role** icon to create a new Trip Role.
- **Requirements Met** – Select this check box if the team member has met the requirements to go on the mission.
- **Approved** – Select this check box to approve the person for the mission trip. Once you approve a team member, the team member or others can make payments for him on your Arena-managed website.
- **Discount Amount** – Use this field to enter the dollar discount amount for the traveler.

3. Click the ***Save*** link.

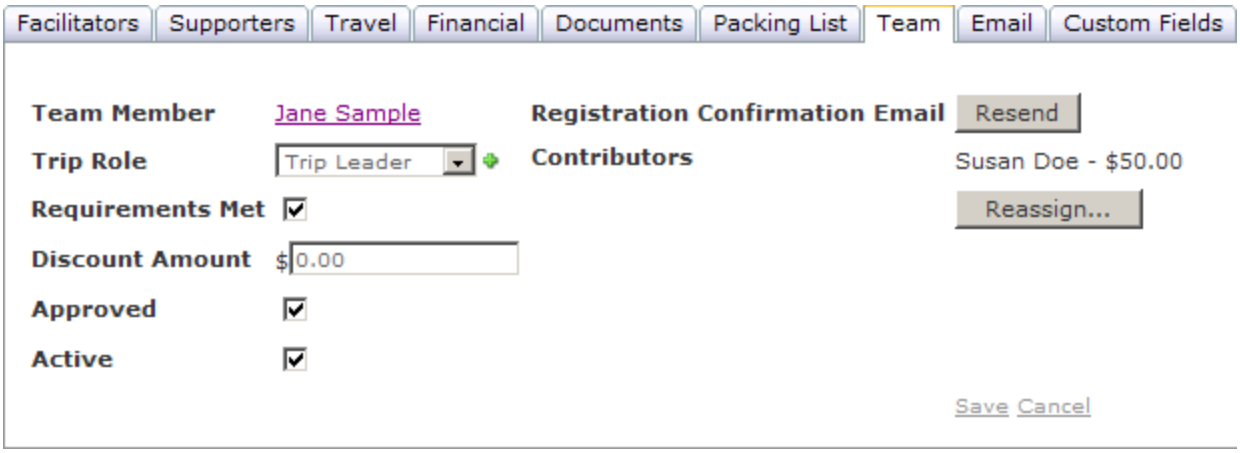
Team Member List

From the **Team** tab, you can add team members, use Bulk Update, email, print labels, and export the selected records to Excel. You can also view the Contributors to each Team member. You can enter Mission contributions through Contributions and/or individuals can make payments for approved team members through your Arena-managed website.



Team Member Details

Once someone is a team member, you can click the ***Name*** link to change the role, enter discounts, approve the person, resend the Registration Confirmation email or reassign a contribution to a different team member.

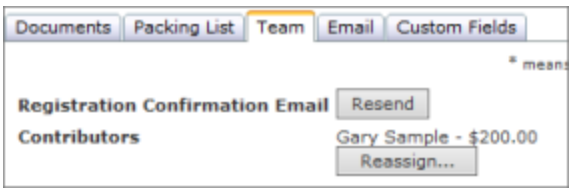


Reassign Payment to Another Traveler

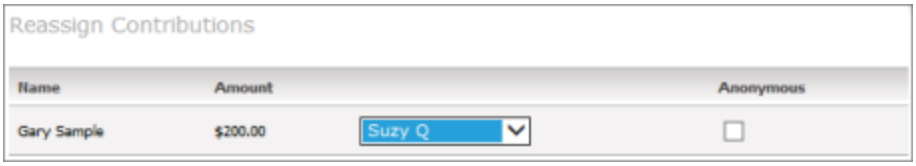
1. Select the **Team** tab of the Mission trip.

2. Select the name of the person from whom you want to reassign funds.

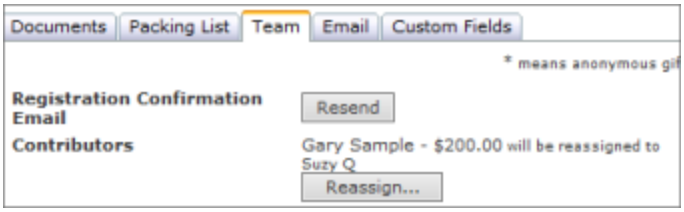
3. Click the **Reassign** button.



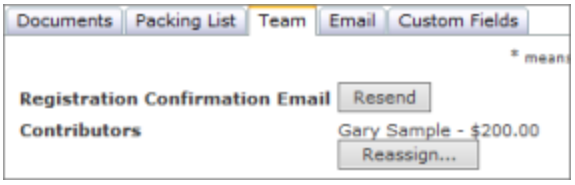
4. From the Reassign Contributions window, select the person to whom you want to apply funds. You can optionally select Anonymous.



5. Click the **Assign** button. Arena closes the Reassign Contributions window and displays a note as to the reassigned funds.



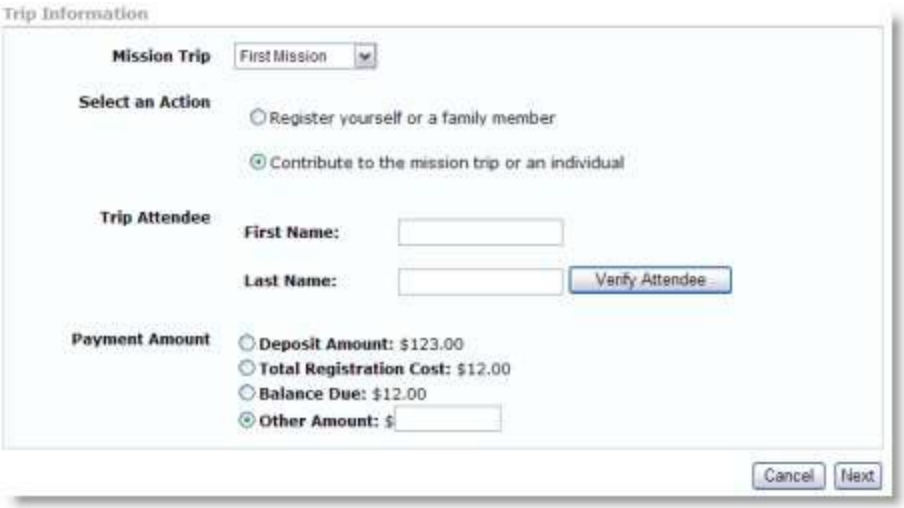
6. Click the ***Save*** link. Arena displays the reassign amount for the other traveler.



Make a Payment Towards a Trip Member or the Mission Trip

1. Choose a **Mission Trip**, if more than one is available. The Online Trip Registration module/control allows the logged-in user to apply his gift to the Mission itself or a specific Team Member.

2. Choose whether to register **Yourself** or a **Family Member** as a Team Member of the trip, or if you are contributing to the mission. Only Adult members of a family can register other family members.



3. Enter the **First** and **Last Names** of the Trip Member for whom you want to make a payment. Leave the name fields blank to apply the entry to the Mission itself.

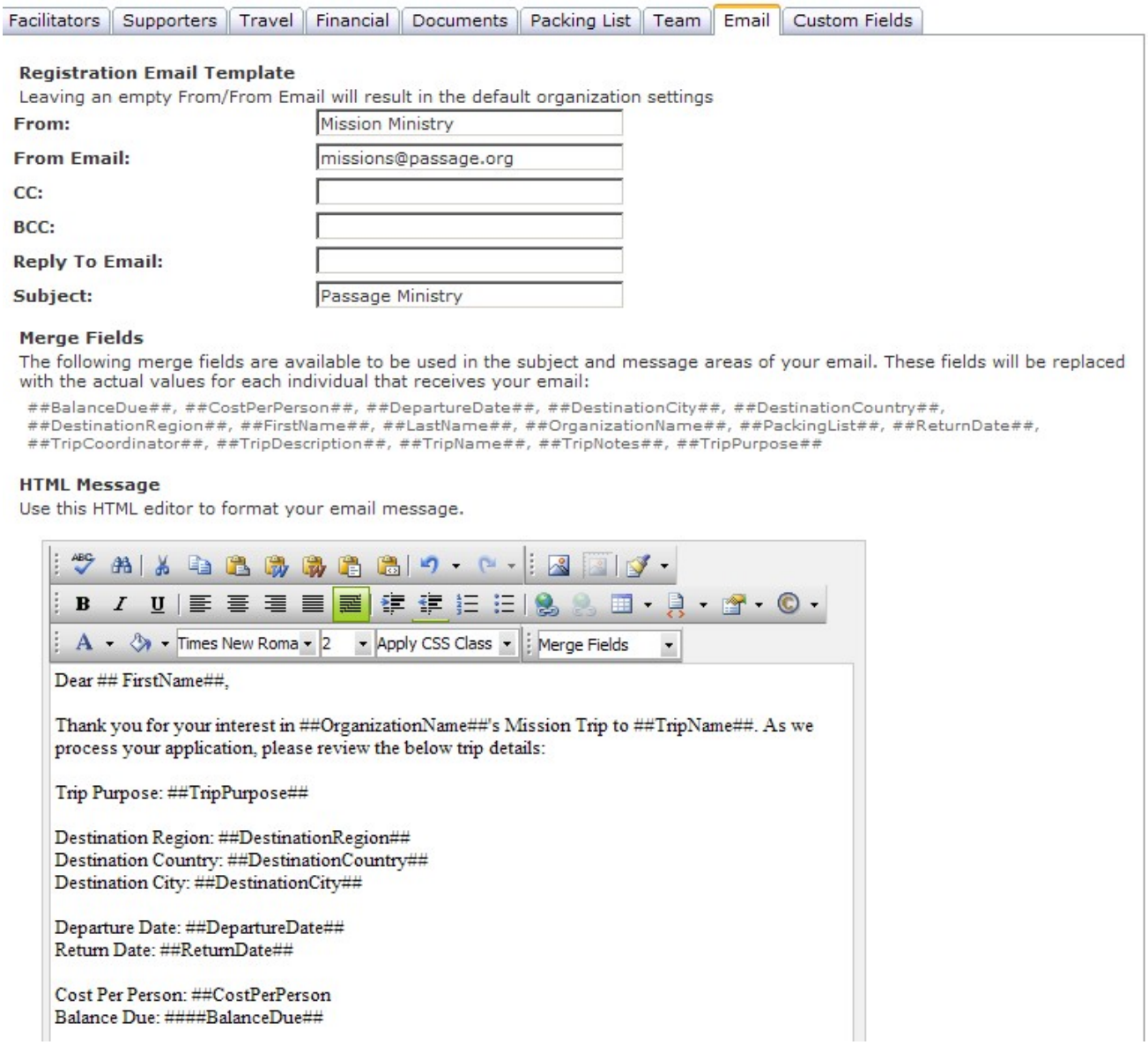
4. Click the **Verify Attendee** button to verify the Trip Member exists for the chosen mission.

5. Enter your payment options and click the **Next** button.

6. Proceed entering payment information, as determined by your organization.

Email Tab

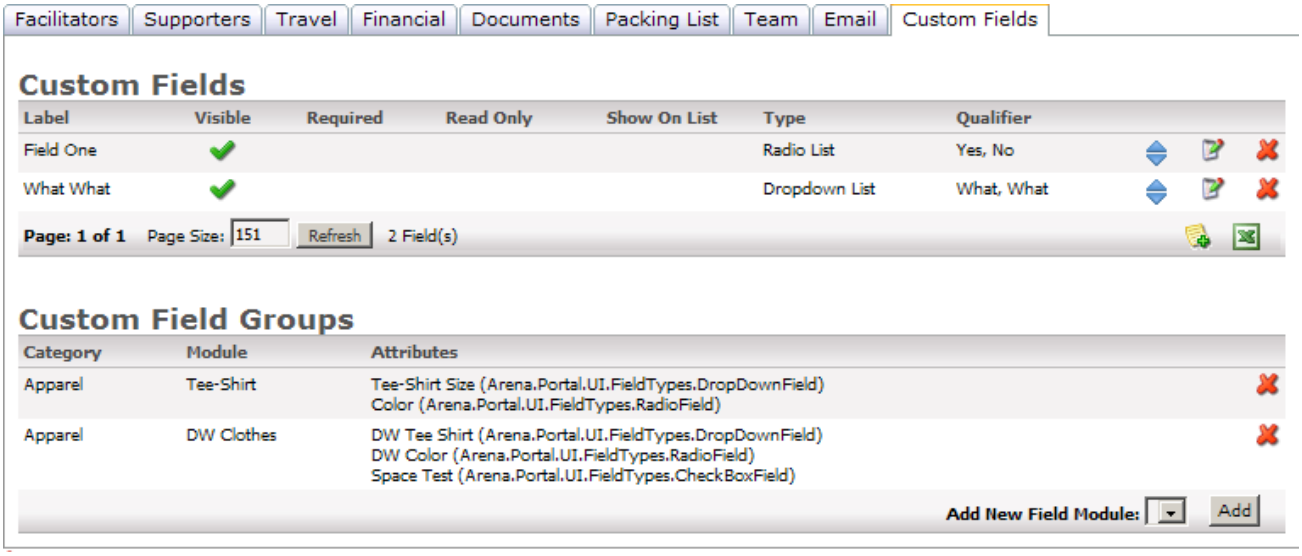
Use this tab to create the registration confirmation email registrants receive, once they complete registration.



Custom Fields Tab

Use this tab to create custom fields or select custom field groups to include on the on-line registration page. Custom Fields are listed in the order in which they appear on this tab. Click the **Reorder** icon to change the order that only displays for the registrant.

Mission Custom Fields



Custom Field Entry

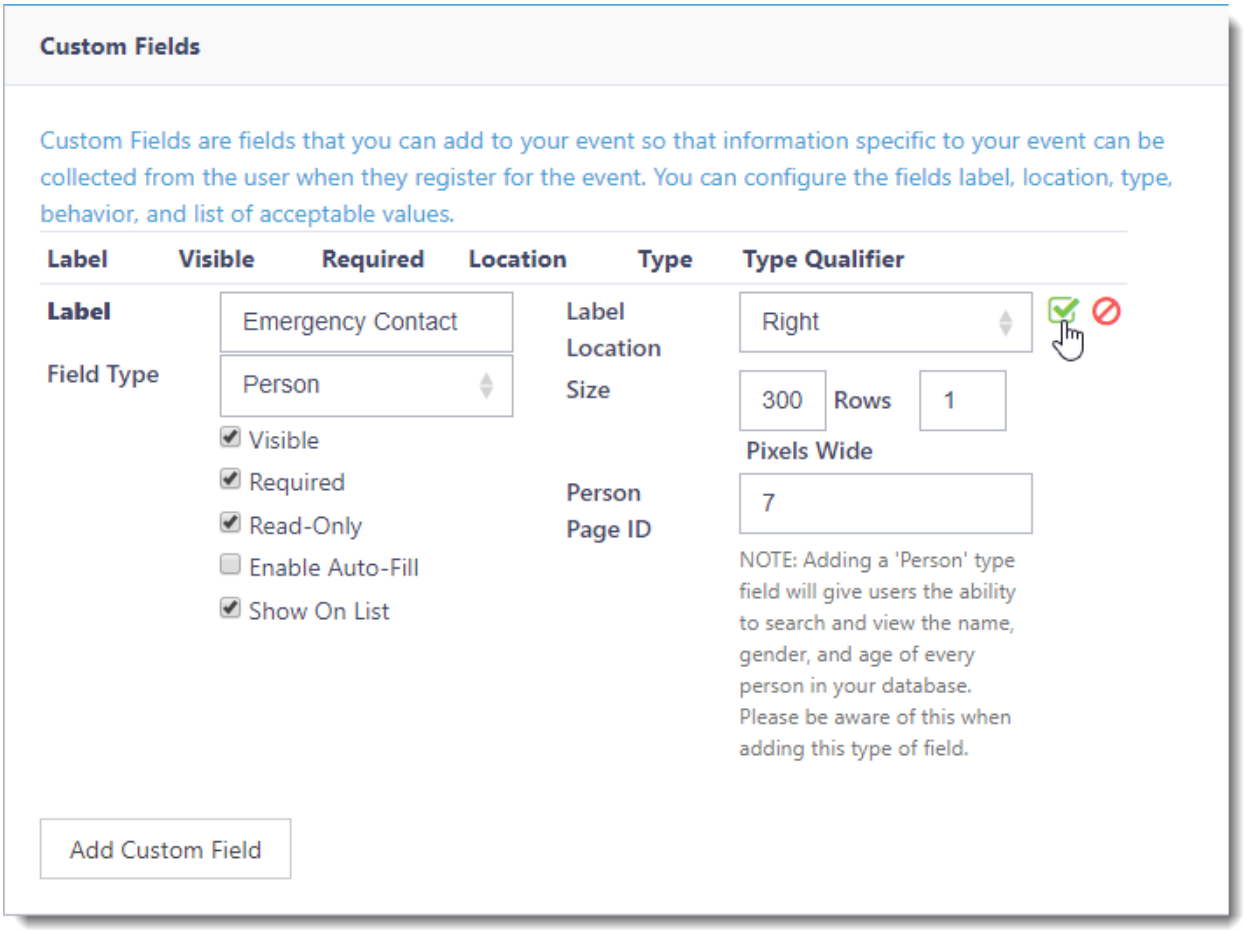
1. Enter a name for the custom field in the **Label** field by overwriting the words "New Field".
2. Select the **Field Type** from the drop-down list. (The default is set to "Textbox".) The various types of Field Types are listed below.
   - **Address**: This field enables the ability for registrants to enter an address (Address, City, State, and Zip fields).
   - **Area**: Places a list of existing areas on the form in a drop-down list format. This field enables the ability to specify a page to display the group area. See Groups Areas for more information.
   - **Check Box**: This field enables the ability to create a multi-select list of options for registrants. Enter the options in comma-delimited format in the Values field.
   - **Custom Query**: This field enables you to enter a custom query, in the Query field.
   - **Date**: Places a date field with a **Calendar** icon.
   - **Document**: This field enables registrants the ability to attach a document. First select a Document Type to associate with uploaded registrant documents. Document Type is a customizable Lookup. See your Arena Administrator if no Document Types are available.

- **Drop-down List**: This field enables you the ability to create a drop-down list of options for registrations to select. Enter values in comma delimited format (e.g. Option A, Option B, Option C).
- **Image**: This field enables registrants the ability to upload an image.
- **Lookup Type**: This field enables the ability to select an existing drop-down from Lookups.
- **Person**: This field enables the ability for registrants to search for a single existing record, using default Person Page ID (7).
- **Person Attribute**: This field links to person attribute on the person detail page.
- **Phone Number**: This field enables registrants the ability to enter a 10-digit telephone number with the option to enter an extension.
- **Radio List**: Places a radio button for each value added in the Value field. Users can select only one option.
- **Rich Text Field**: Allows users to enter rich text.
- **Static HTML Content**: This field enables the ability to enter static text or static HTML formatted text in the HTML field.
- **Text box**: Places a text box on the form. The text box allows 255 characters.

3. Select the label location from the **Label** drop-down list. Options are left, right, top, or bottom.

4. Select the **Size** from the Rows and Pixels Wide fields.
   - **Rows**: Use this option to adjust the number of rows to use for the custom field (e.g., a rich text field or static HTML content.)
   - **Pixels Wide**: Use this option to specify the width of the custom field.

5. Depending on the Field Type, you may be required to enter a value for the choices presented. Field Types that require this are check box, radio, drop-down, and static.
   - **Visible**: Select this check box to make the field visible (both internally and externally).
   - **Required**: Select this check box for fields that are required to select or complete.
   - **Read Only**: Select this check box to make fields view only. The field displays as a disabled field (grayed out).
   - **Enable Auto-Fill**: For Events behind a member login, check this box for required custom fields.
   - **Show on List**: Select this check box for fields to display on the **Tag Member** page.



6. After making the appropriate changes for the custom field, click the **Save** icon to save your changes or the **Cancel** icon to close the customization options.

Custom Field Modules

If available, select a Custom Field Group. If not available, see your Arena Administrator. To remove a Custom Field or Custom Field Module, click the **Delete** icon next to the field/module you want to remove. (A custom field cannot be deleted if it is in use.)

Custom Field Modules

Field Modules are pre-configured groupings of Custom Fields that can be added to your event. If you have a group of fields that you consistently use for your events, these fields can be set up as a Field Module so that you can easily add them here. The Arena Administrator(s) can set these field modules up for you.

Category	Module	Attributes	Remove
Unknown	New Field Group	Query Test (Arena.Portal.UI.FieldTypes.CustomQueryField)	

New Field Group

Add Custom Field Module

Headquarters

Institutions

The **Institutions** page allows you to manage your institutions and assign various information to each institution. An Institution represents a single church or a grouping of churches. Institutions can have sub-institutions under them to distinguish the hierarchy between them. Institutions with sub-institutions cannot be deleted until all of the sub-institutions have been deleted.

This Help page contains the following sections:

Getting Started

Add an Institution

Modify an Institution

Other Features

Getting Started

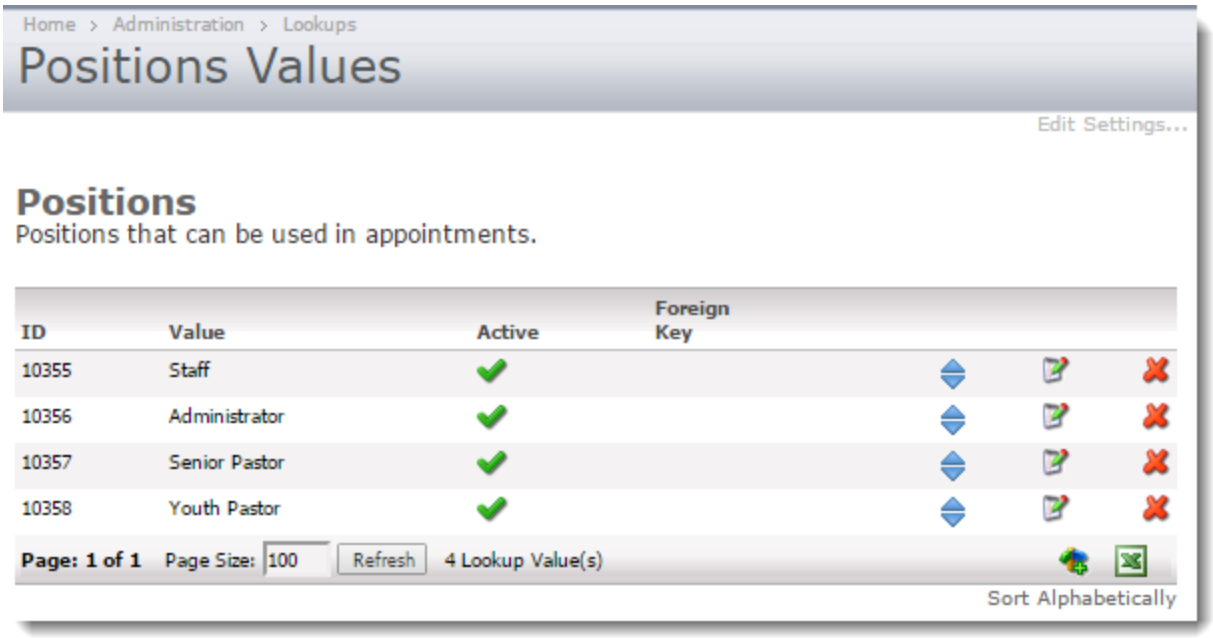
Before adding institutions, you may want to add individuals and positions that are associated with your institutions.

Individuals

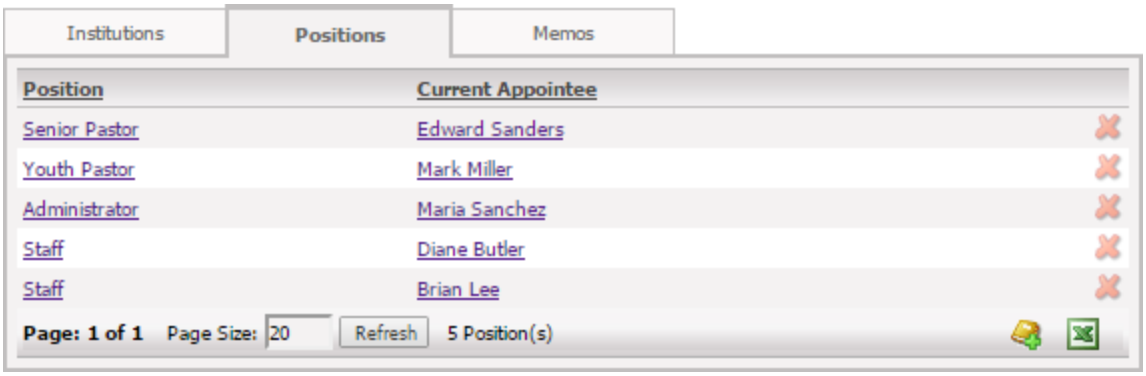
Within each institution, individuals are assigned as leaders or assigned to positions. To add an individual, select the **Add New Family** option from the **Membership** menu. For more detailed information on adding an individual, see the Add New Family video tutorial.

Positions

A position is the specific job that an appointee of the institution fulfills. Before positions can be added to an institution, they must be established on the Lookups page (From the **Administration** menu, select the **Lookups** option and then scroll down and select the ***Positions*** link listed).



The same position can be used multiple times per institution. For example, you may have two individuals assigned to the position of "Staff" at the same church. But, each instance of the position can only have one current appointee.

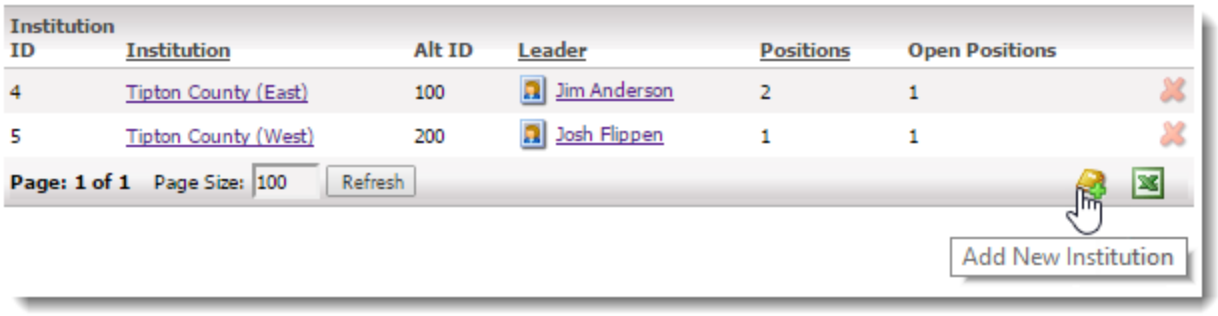


A position is independent from level to level. When viewing the "Positions" and "Open Positions" totals for an Institution, they do not include the position totals from sub-institutions.)

Add an Institution

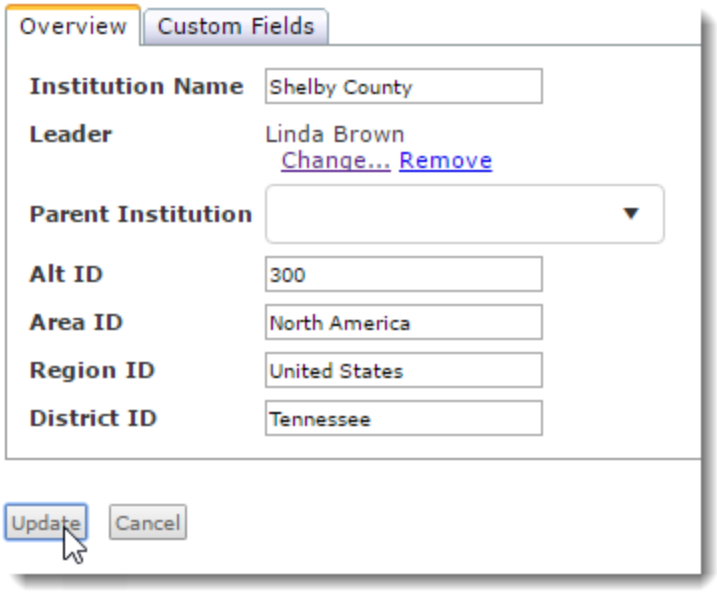
1. Start by navigating to the Institutions page. From the **Headquarters** menu, select the **Institutions** option.

2. Next, click the **Add New Institution** icon.



3. When adding an institution, the **Institution Name** and **Leader** fields are required. Select the **Parent Institution** from the drop-down list when entering a sub-institution or leave blank when entering a parent institution. Enter the **ID** fields as appropriate (optional). Click the

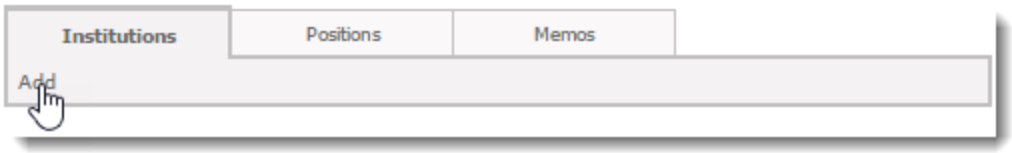
Update button when you are done.



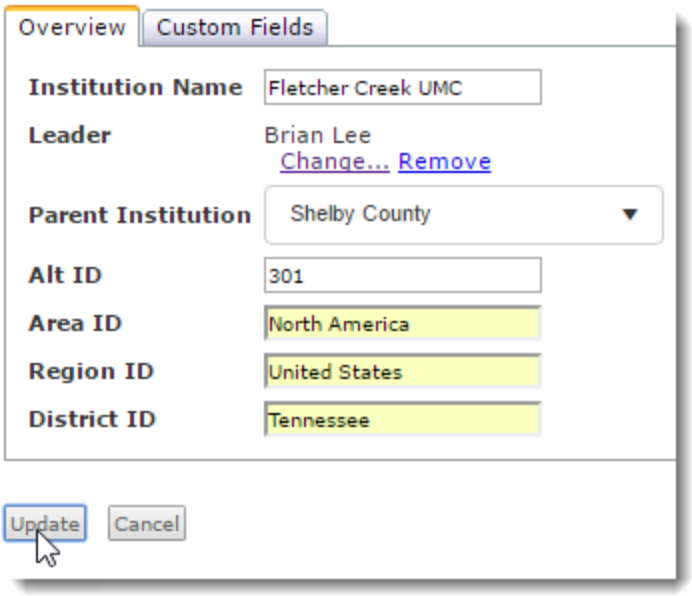
Modify an Institution

1. Click the ***Institution*** link listed on the grid corresponding to the institution you would like to modify.

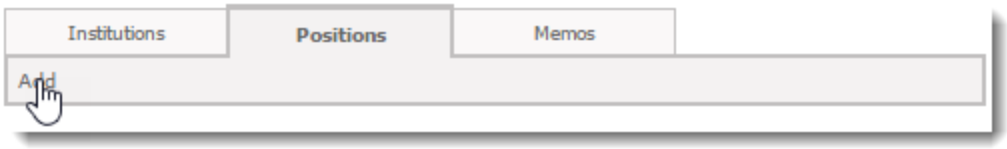
2. Notice there are three tabs of information available: Institutions, Positions, and Memos. Let's start by selecting the **Institution** tab and then clicking the ***Add*** link to add a new sub-institution.



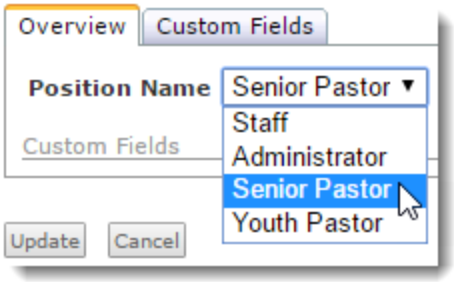
3. Enter the information for the sub-institution and then click the **Update** button.



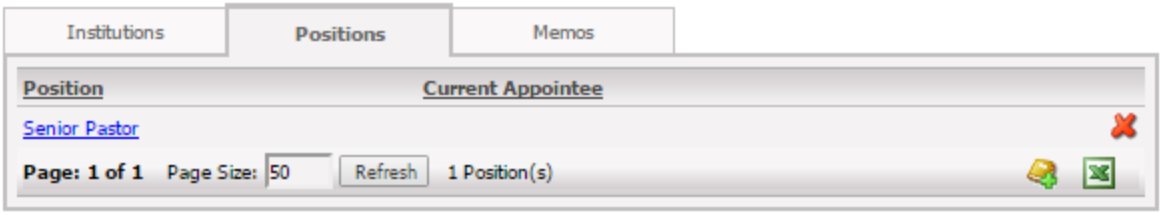
4. Next, click the **Positions** tab and then click the ***Add*** link.



5. Make your selection from the **Position Name** drop-down list and then click the **Update** button.

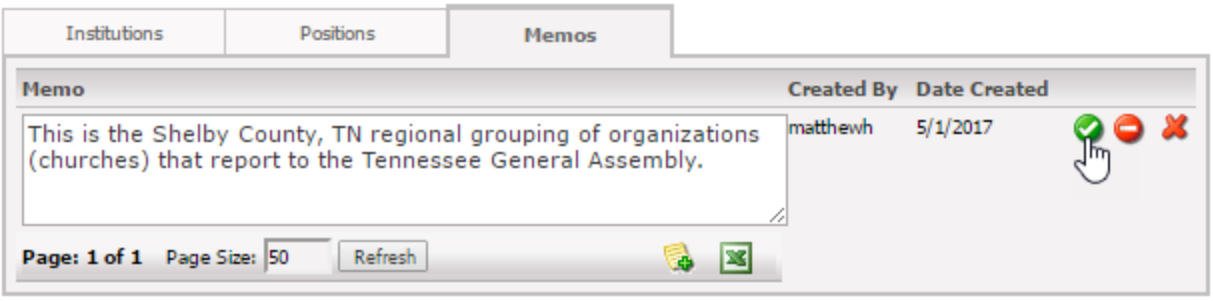


6. Notice the position is listed on the grid. (Click the **Add New Position** icon to add additional positions.)



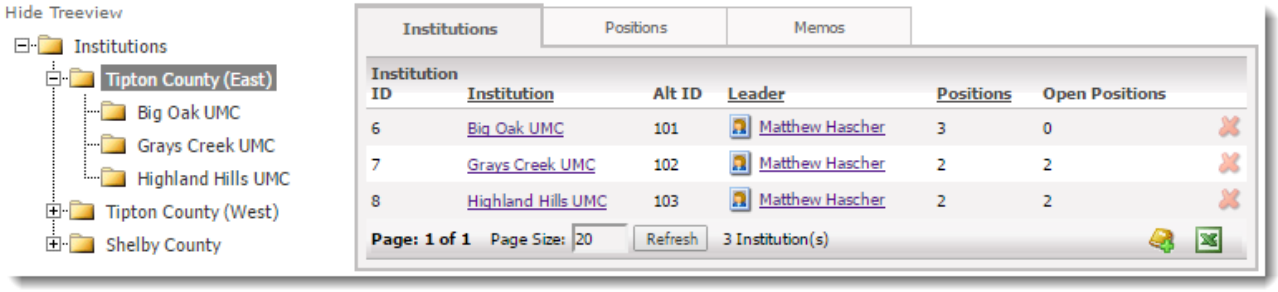
7. To add a memo to this institution, select the **Memo** tab and then click the ***Add Memo*** link.

8. Enter a memo and then click the **Save** icon when you are finished.



Other Features

Click the ***Show Treeview*** link to view the institutions in a chart form and click the ***Hide Treeview*** link to only display the Institutions grid. The Institutions grid contains information about the sub-institutions. Click the ***Institution*** or ***Leader*** link to edit those records.



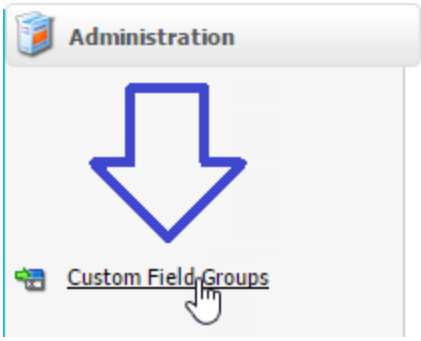
Custom Fields Tab

The **Custom Fields** tab is an optional area which allows you to further customize and track detail information. It is available when you edit an Institution, Position, or Appointment. Although Custom fields can be added one at a time to each Institution, it is recommended to use Custom Field Groups.

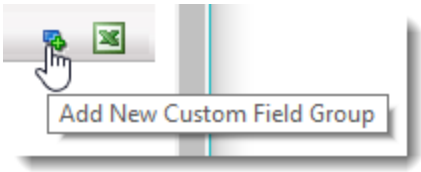
Custom Field Groups

Custom Field Groups allow you to group together your custom fields and then use them as a template for each Institution. (Custom Field Groups can also be used for Positions or Appointments.) For example, instead of manually adding 5 custom fields to each institution, add 5 custom fields to a group and then select the group of Custom Fields on each institution record. This saves time and also allows you to report on these fields later because they are all related instead of being independent.

1. Select the **Custom Field Groups** option from the Administration menu.



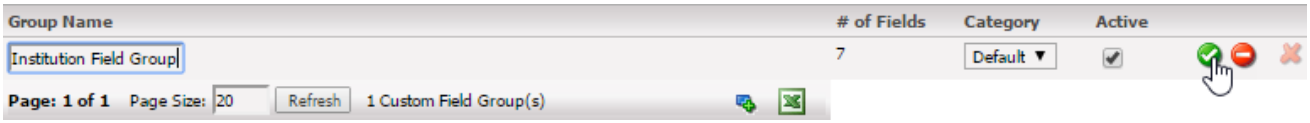
2. Add a new field group by clicking the **Add New Custom Field Group** icon.



3. Click the **Edit** icon next to the Field Group that you just added.

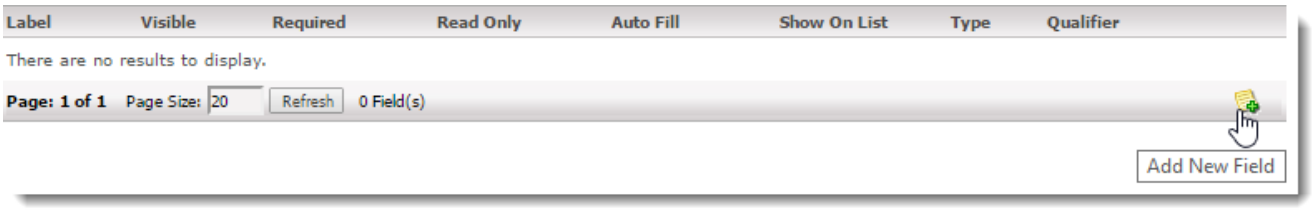
4. Change the default name from "New Field Group" to something more descriptive for what you

are doing, such as "Institution Field Group" and then click the **Save** icon when you are done.

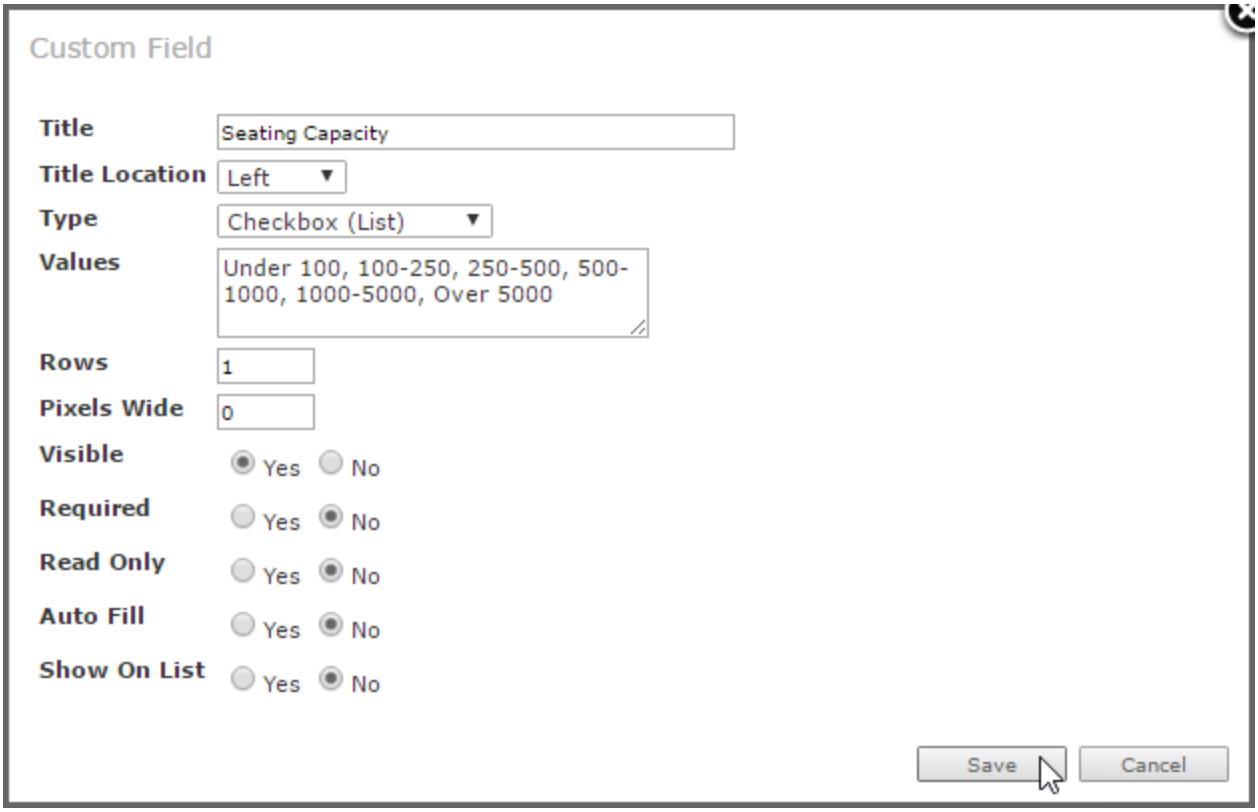


5. Next, click on the ***Field Group*** link.

6. Now it's time to add some fields. Locate the **Add New Custom Field** icon in the lower right-hand corner and click on it.

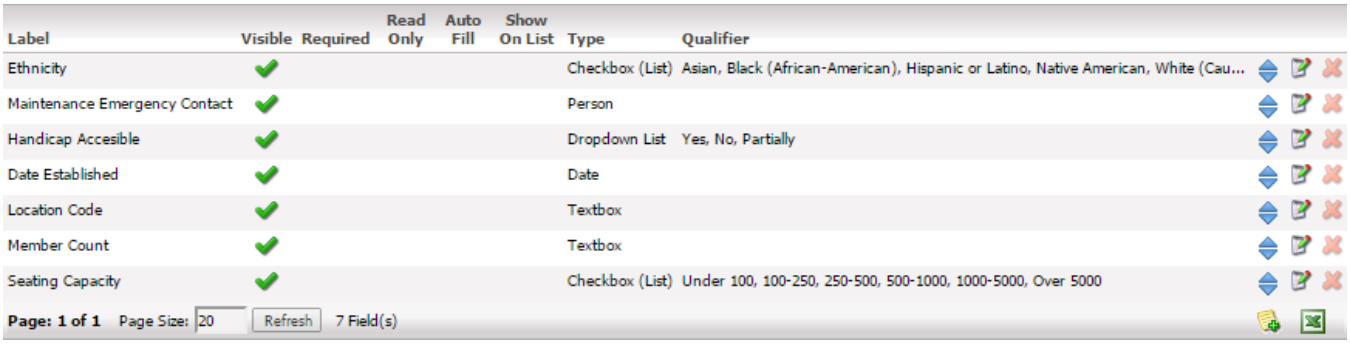


7. Specify the **parameters** for the Custom Field and then click the **Save** button.



8. Continue adding Custom Fields and review what you have added. Click and drag the **Move**

icon to reorder the fields. Now you are ready to add this Custom Field Group to your Institutions.



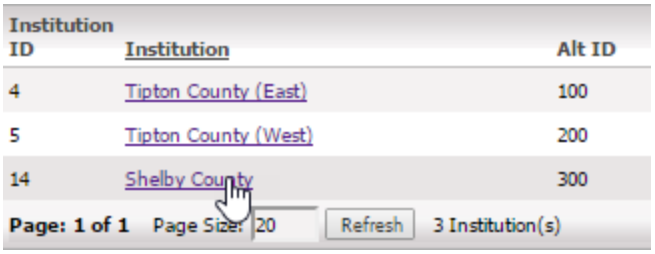
Label	Visible	Required	Read Only	Auto Fill	Show On List	Type	Qualifier
Ethnicity	✔					Checkbox (List)	Asian, Black (African-American), Hispanic or Latino, Native American, White (Cau...
Maintenance Emergency Contact	✔					Person	
Handicap Accesible	✔					Dropdown List	Yes, No, Partially
Date Established	✔					Date	
Location Code	✔					Textbox	
Member Count	✔					Textbox	
Seating Capacity	✔					Checkbox (List)	Under 100, 100-250, 250-500, 500-1000, 1000-5000, Over 5000

Page: 1 of 1 Page Size: 20 Refresh 7 Field(s)

The following steps below to add a Custom Field Group to an institution.

1. Start by navigating to the Institutions page. From the **Headquarters** menu, select the **Institutions** option.

2. Navigate to your desired institution and then click on the ***Institution*** link.



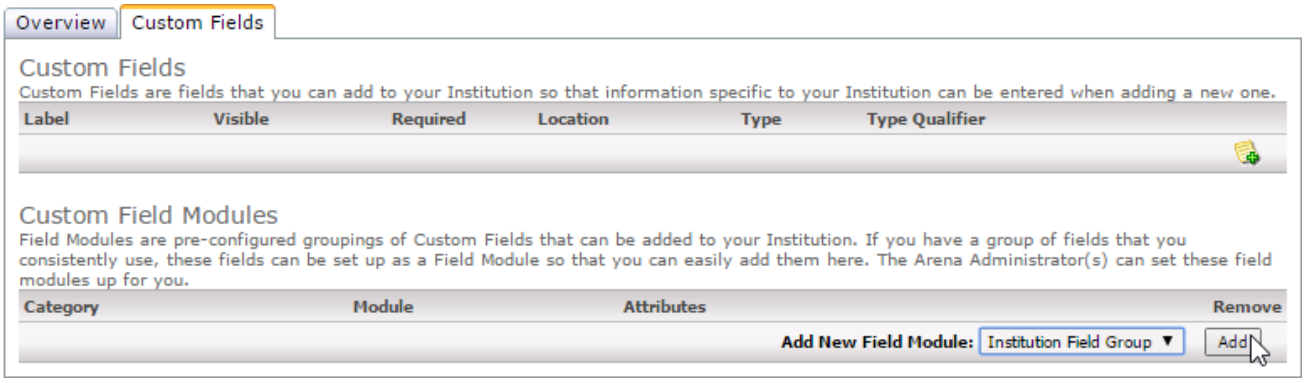
Institution ID	Institution	Alt ID
4	Tipton County (East)	100
5	Tipton County (West)	200
14	Shelby County	300

Page: 1 of 1 Page Size: 20 Refresh 3 Institution(s)

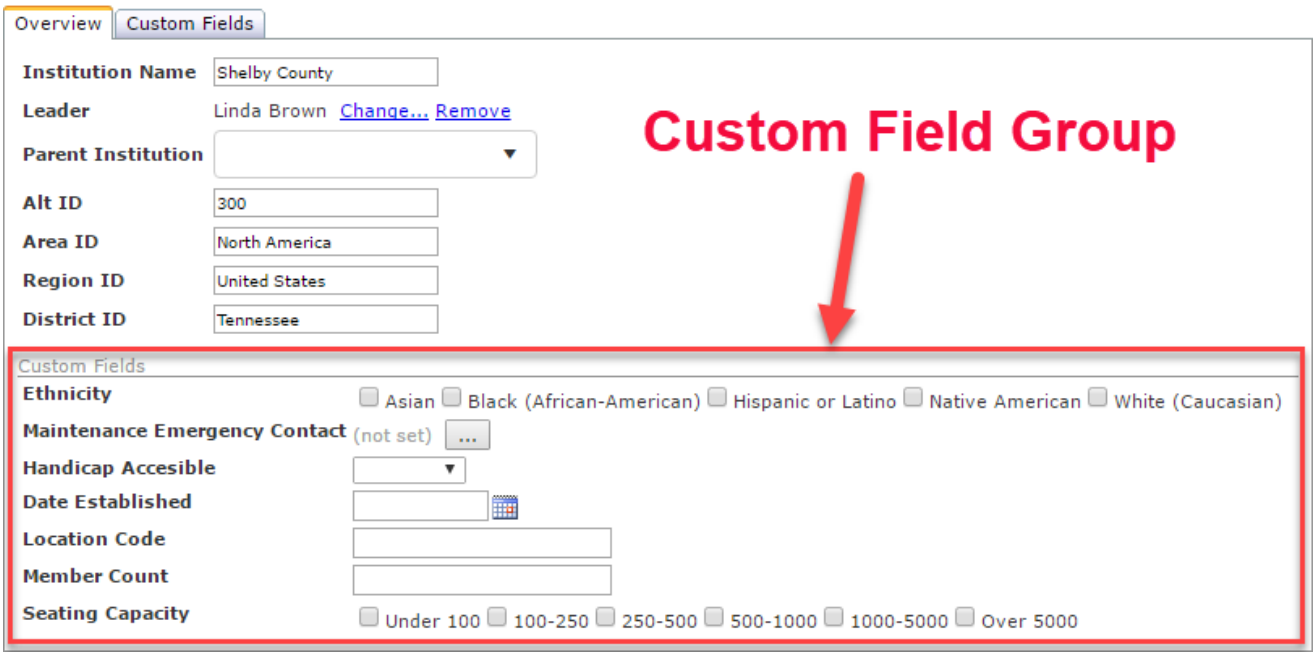
3. Next, click the **Edit Details** button.

4. Select the **Custom Fields** tab.

5. Select the Custom Field group from the **Add New Field Module** drop-down list and then click the **Add** button.



Below is an example of a Custom Field Group assigned to an Institution.



Detailed information for Custom Fields

Detail information about the parameters of a Custom Field are listed below.

- **Title**: Enter the name for the custom field.
- **Title Location**: Select the label location. Options are left, right, top, or bottom.
- **Type**: Select the type of field to use.
  - **Address**: A field for registrants to enter an address.
  - **Area**: A field to specify a page to display the group area. See Groups Areas for more information.
  - **Check box**: A field to create a multi-select list of options for registrants. Enter the options in comma-delimited format in the Values field.
  - **Custom Query**: A field to enter a custom query in the Query field.
  - **Date**: A field for registrants to enter a date.
  - **Document**: A field for registrants to attach a document. You first need to select a Document Type to associate with uploaded registrant documents. Document Type is a customizable Lookup. See your Arena Administrator if no Document Type is available.
  - **Drop-down List**: A field to create a drop-down list of options for registrations to select. Enter values in comma delimited format (e.g. Option A, Option B, Option C) in the Values field.
  - **Image**: A field for registrants to upload an image.
  - **Lookup Type**: A field to select an existing drop-down from Lookups.
  - **Person**: A field for registrants to search for a single existing record, using default Person Page ID (7).

- **Phone Number**: A field for registrants to enter a 10-digit telephone number with the option to enter an extension.
- **Radio List**: A field to create a single-select radio list of options for registrants. Enter values in comma-delimited format (e.g. Option A, Option B, Option C) in the Values field.
- **Rich Text Field**: A field to enter rich text.
- **Static HTML Content**: A field to enter static text or static HTML-formatted text in the HTML field.
- **Text box**: A field for registrants to enter text.
- **Rows**: Use this option to adjust the number of rows to use for the custom field, e.g., a rich text field, or static HTML content.
- **Pixels Wide**: Use this to specify the width of the custom field.

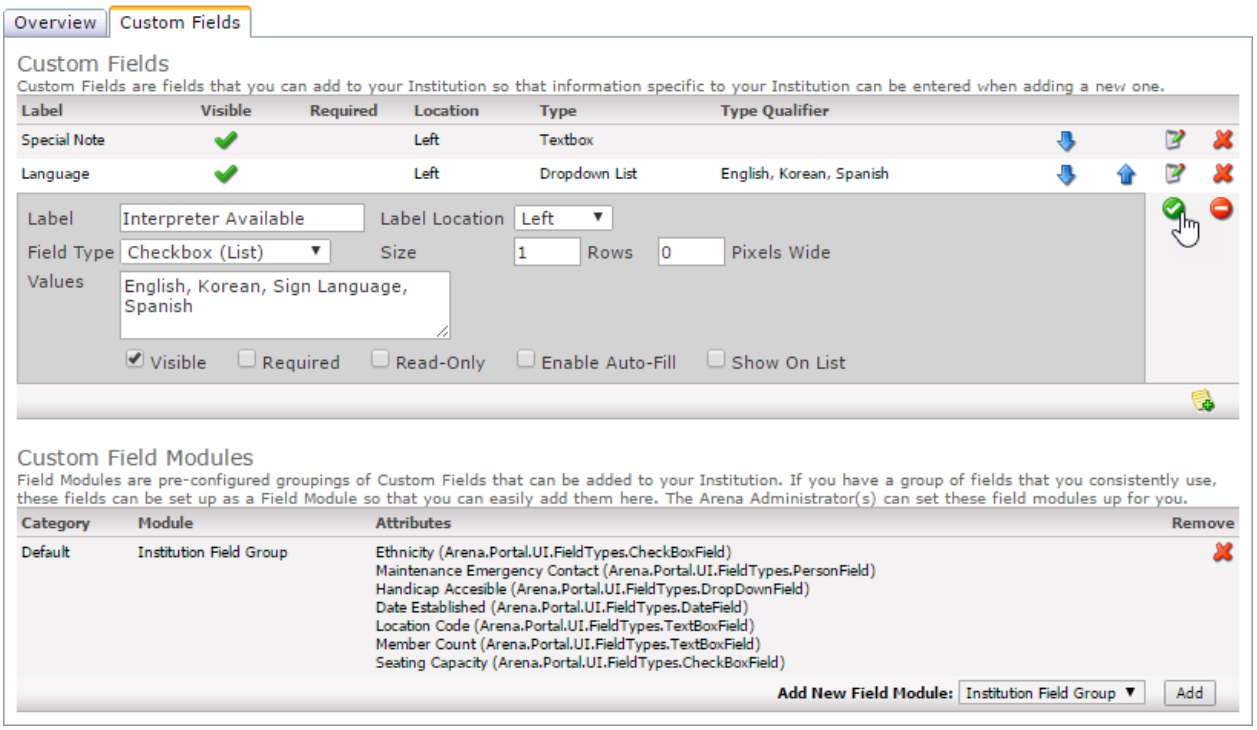
- **Values**: Depending on the Field Type, you may be required to enter a value for the choices presented. Field Types that require this are check box, radio, drop-down, and static. These values are comma-delimited for multiple values.
- **Rows:** Some Custom Fields can have a size requirement added to them by using the **Rows** or field. For example, you could specify that a Text Box contains "3" rows of data.
- **Pixels Wide:** Some Custom Fields can have a size requirement added to them by using the **Pixels Wide** fields. For example, you could specify that a Drop-down control is "500" Pixels wide.
- **Visible**: Select this check box to make the field visible both internally and externally. If you don't want this custom field to display on your institutions, do not it or you may end up with orphaned data records. Select the "No" radio button to make this field not visible. This retains the data in your database even though the field does not display in Arena. You also have the ability to make the field visible again and have the data display.
- **Required**: Select this check box for fields that are required to select or complete.
- **Read Only**: Select this check box for view only fields. This makes the field display as a disabled field (grayed out).
- **Auto Fill**: For Events behind a member login, select this check box for required custom fields.
- **Show On List**: Select this check box for fields to display on the **Tag-Member** page. If available, select a **Custom Field Group**. If not available, see your Arena Administrator. To remove a Custom Field or Custom Field Module, click the **Delete** ✘ icon next to the field/module you want to remove. The Custom Field cannot be in use.

Manually entered Custom Fields

Custom Fields can be used in conjunction with Custom Field Groups (a.k.a. Custom Field Modules). For example, you may have a group of fields that are added to every institution and only some fields that are added to one or a few institutions. (e.g. Special Note, Language, Interpreter Available)

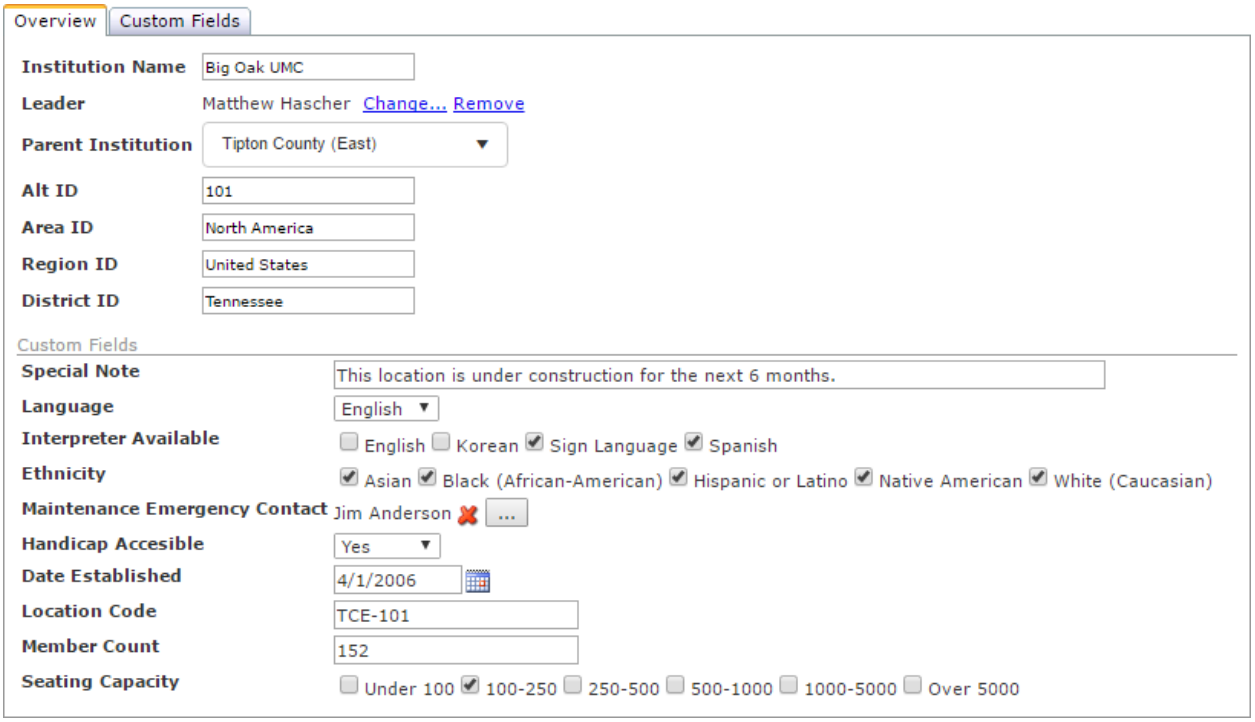
Follow the steps below to manually enter Custom Fields.

1. Navigate to an Institution and then click the Edit Details button.
2. Select the **Custom Fields** tab and then click the **Add New Custom Field** icon.
3. Next, specify the **parameters** for the Custom Field.
4. Click the **Save** icon when you are finished.



- Click the **Edit** icon to make changes to a Custom Field.
- Click the **Up Arrow** icon to move the custom field up in the listing.
- Click the **Down Arrow** icon to move the custom field down in the listing.
- Click the **Update** Update button when you are finished adding or modifying custom fields.

Below is an example of how the custom fields and custom field groups display seamlessly on an Institution record under the "Custom Fields" header.



Appointments

The **Appointments** page works in conjunction with the Institutions page. After Institutions have been established, you can use the Appointments page to manage the appointments within those institutions.

This Help page contains the following sections:

Appointment Grid Features

Add a new Appointment

Memos

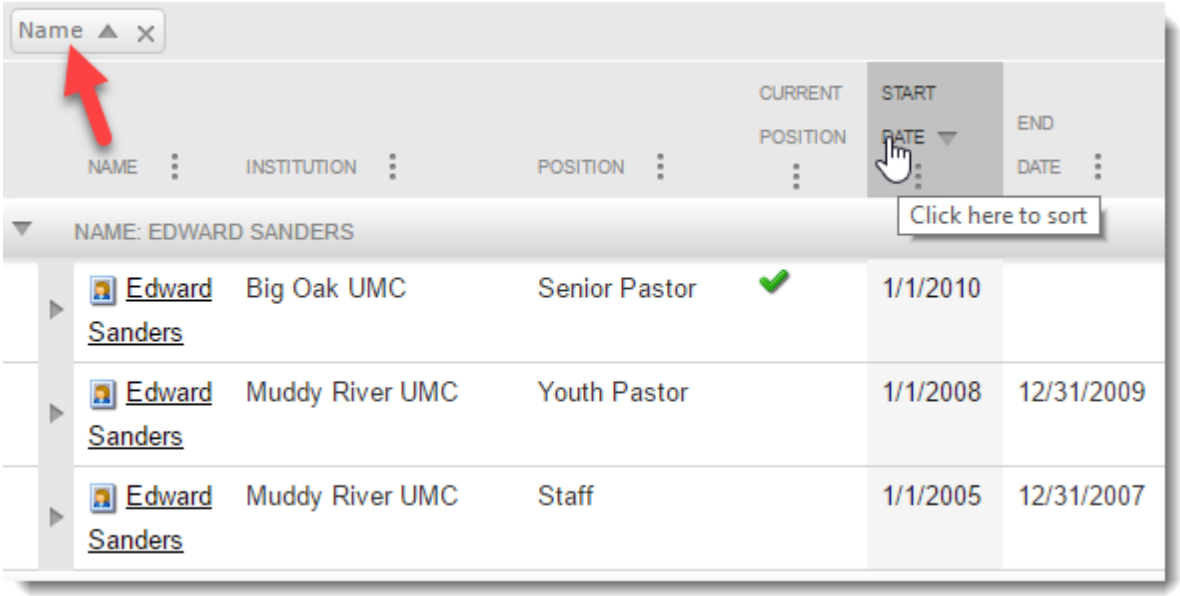
Delete an Appointment

Appointment Grid Features

Header

The **Header** fields (Name, Institution, Position, etc.) can be used to group or sort appointments.

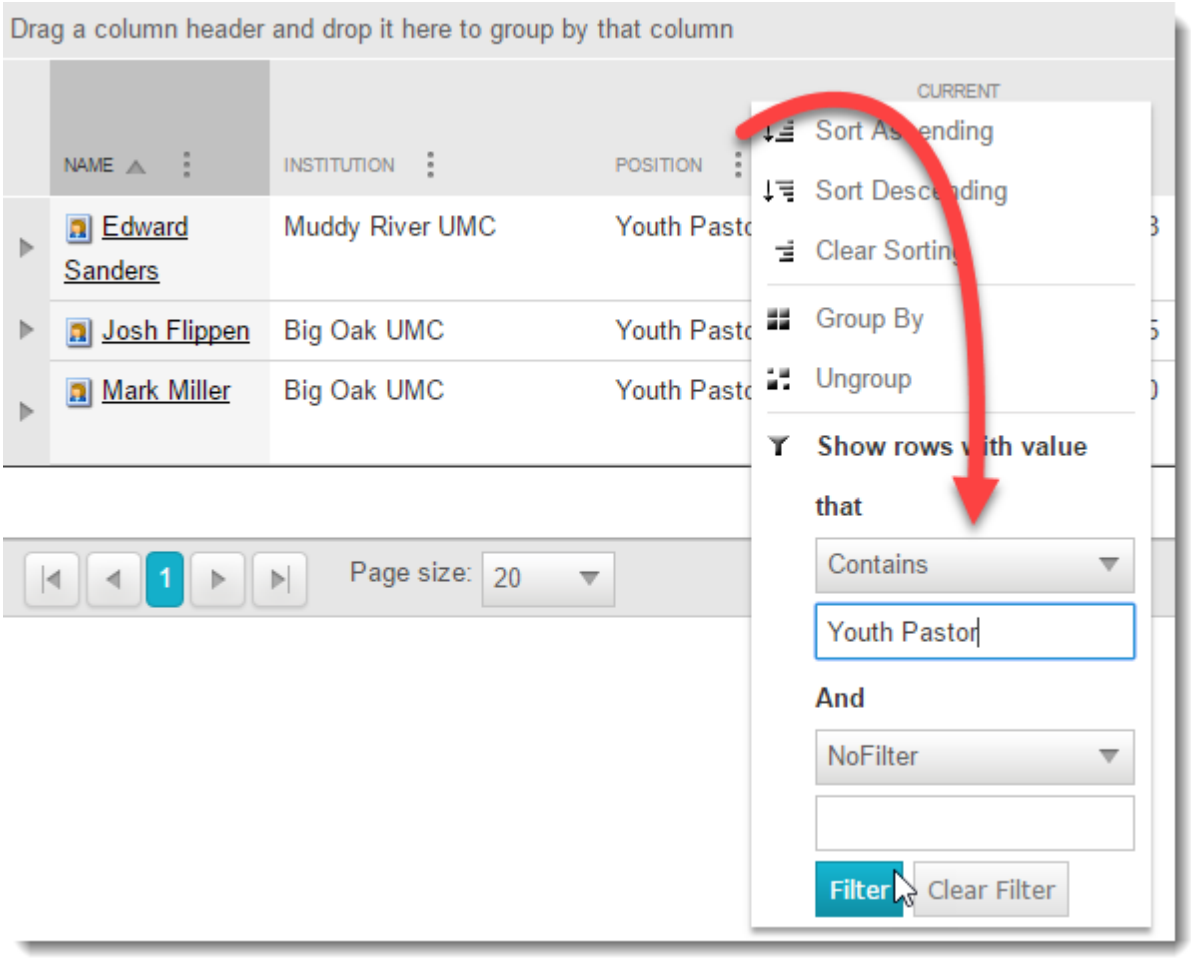
- Drag a Header field to the top to group the appointments. (Example: **Name**)
- Click on a Header field to sort the appointments. (Example: **Start Date**)



The **Menu** icons can be used to group, sort, or filter appointments.

- Click the **Menu** icon to filter the appointments. (Example: **Position** contains "Youth Pastor") The Filter fields are case sensitive.

  NOTE: Filters are cleared when you navigate away and come back to the Appointments page.

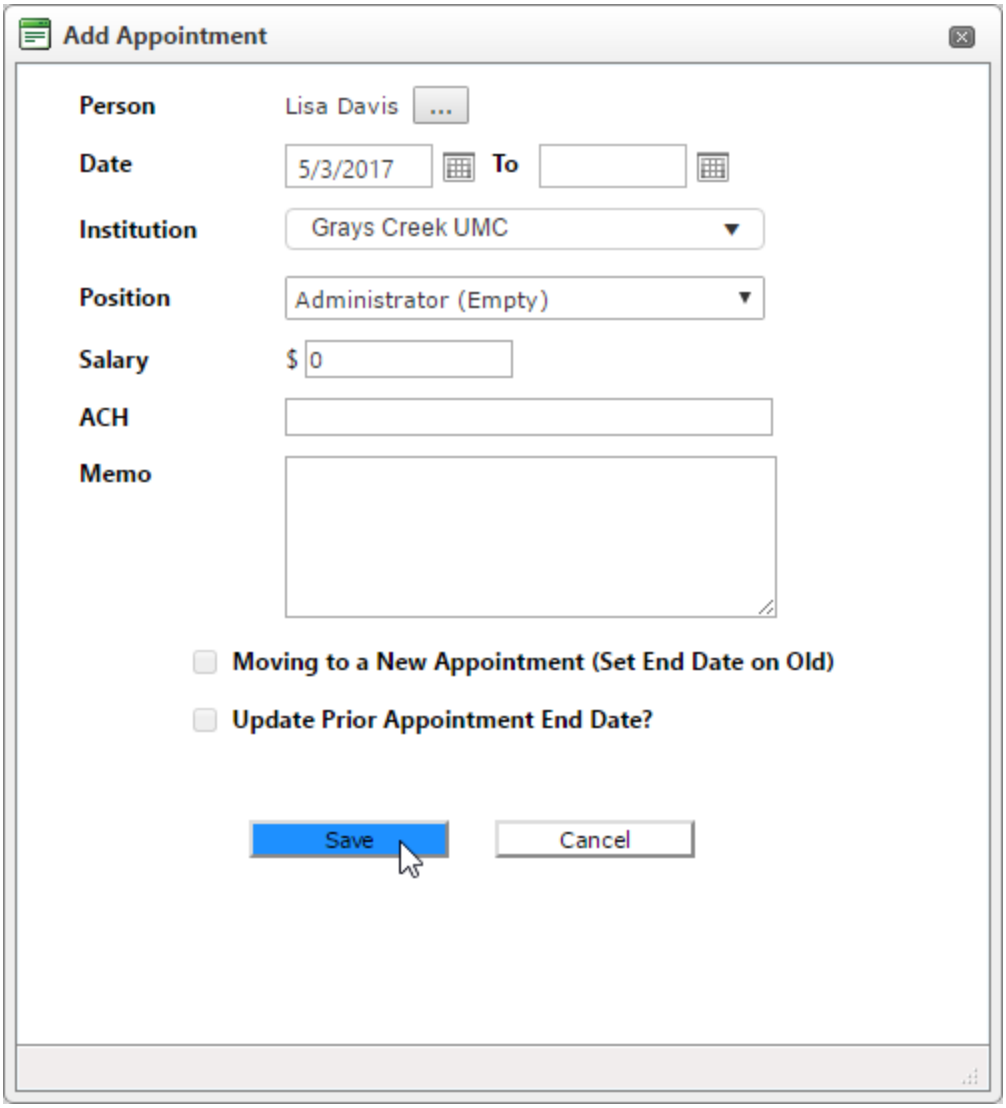


Add a New Appointment

Click the **Add New Appointment** icon in the right-hand corner to add a new appointment. Select the Person*, Start Date*, End Date, Institution*, Position*, Salary, ACH, and Memo. (*Required Fields)

The following check boxes are also available when adding a new appointment:

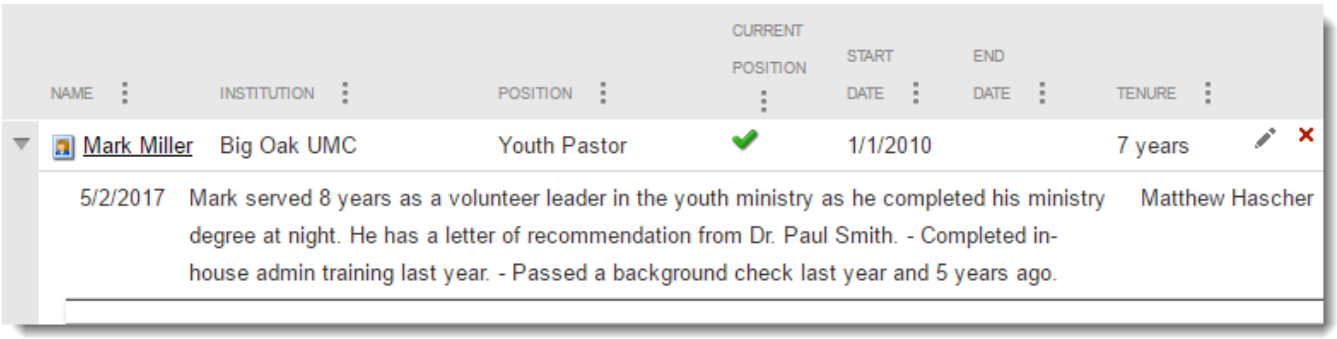
- **Moving to a New Appointment (Set End Date on Old)**: Select this option to set the End Date on this person's current position to be the day before the Start Date for the new appointment.
- **Update Prior Appointment End Date?**: Select this option to set the End Date on on the current appointee's position to be the day before the Start Date for the new appointment.



Memos

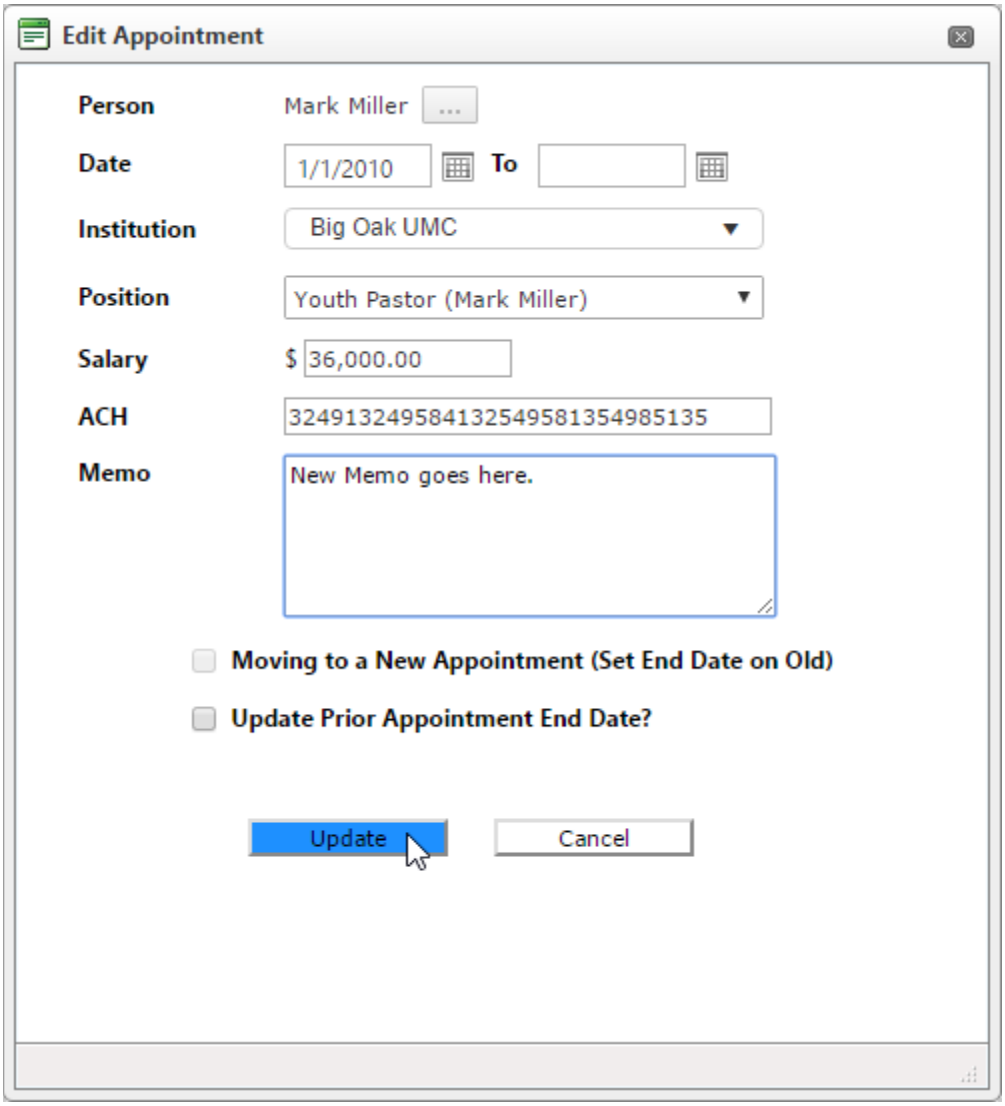
View a Memo

Click the **Expand** icon to view the memo(s) for an appointment.



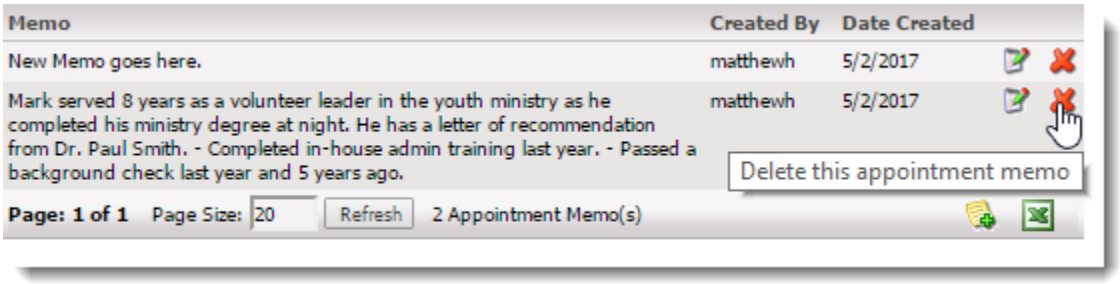
Add a Memo

Click the **Edit** icon to add a new memo. Enter text into the **Memo** field and then click the **Update** button.



Modify or Delete a Memo

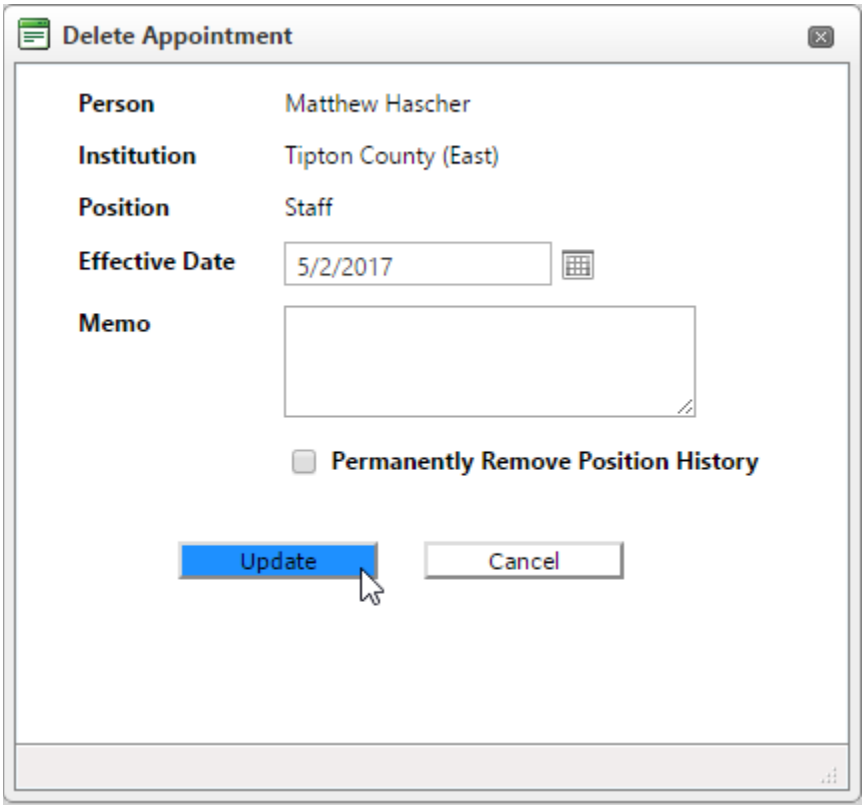
Navigate to the appointment on the Institutions page (Select "Institutions" from the Headquarters menu. Click on the ***Institution*** link, the ***Position*** link, and then click the ***Appointee*** link.) and then click either the **Edit** icon to modify or the **Delete** icon to delete a memo.



Delete an Appointment

Click the **Delete** ✖ icon to end or remove an appointment. The **Delete Appointment** window appears.

- Enter the End Date for the appointment into the **Effective Date** field and then click the **Update** button. (This is the same as editing an appointment and entering an End date.)
  - If you want to totally remove the appointment from the system, select the **Deleting an appointment (Permanently Remove Position History)** check box and then click the **Update** button.



Self-Hosted Updates

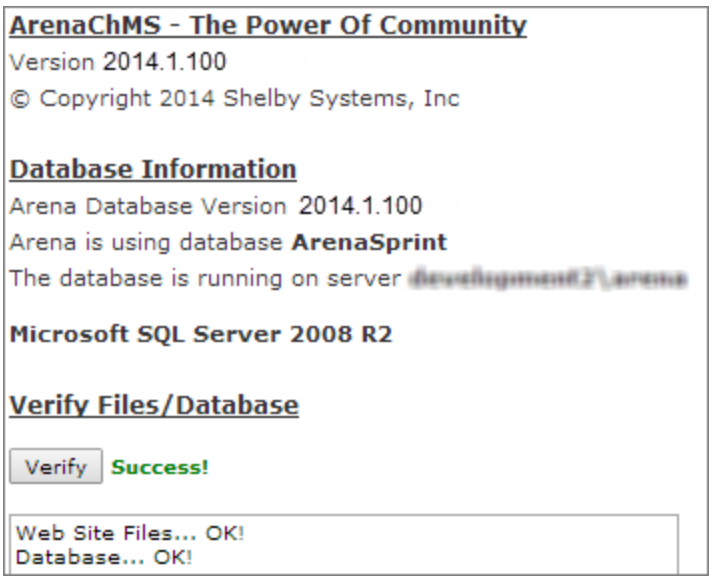
Updates are available on the Shelby Community/Arena/Downloads page for self-hosted environments. Subscribe to the Arena Announcement thread to receive emails when there is a new release or update. Follow the steps below to install updates. (If your organization has an Arena Sandbox, install a test update on the Sandbox prior to installing on Arena Production.)

Install Updates

1. Verify there are no active users.

2. Login to Arena.

3. Verify your installation. Click the **About** icon in the top right corner of the Arena home page to verify your Arena installation. The results confirm website files and the database in the pop-up windows. Changes made to Arena core display below the verify box so you are aware of areas the update may effect.



4. Make a backup of your database. You might consider backing up the ArenaChMS folder on the web including the web.config file and the Arena Shelby v.5 sync.exe.config file if you are running the Arena Shelby v.5sync.

5. Stop Automation Agents.

6. Download the update. Some releases may require installing a patch or update so be sure to check for any prerequisite updates.

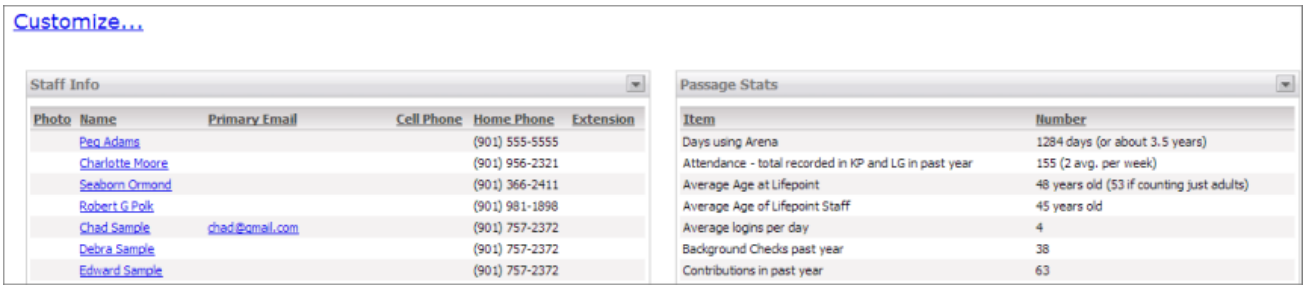
7. Install the release.

8. Log into Arena and verify. If your organization uses Arena Mailing, you also need to update Shelby Mailroom. Install this on your Arena server when users are not on the database.

Dashboard Ideas

Use the home page of Arena, or any other page, to provide organization wide or ministry specific information for all staff or specific staff by module. By using specific modules to display specific information, you can set security for each module by user.

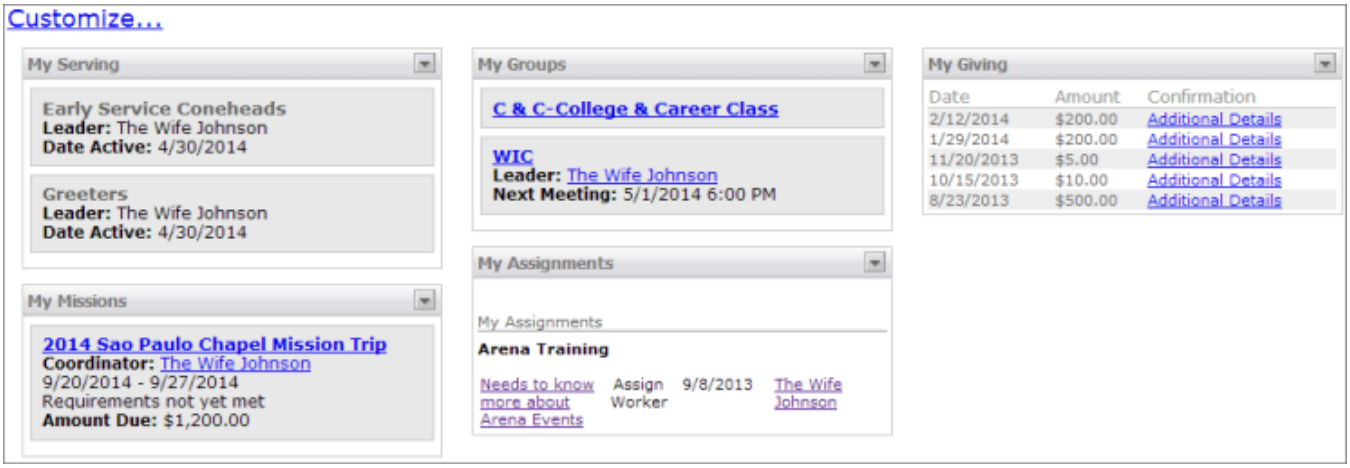
This is an example of using the 2 Dock Container module with two separate Report Grid from Query modules to display specific information and statistics.



This example uses the 3 Dock Container module, Pages as Tab module and the Report Viewer module to organize reports by ministry. You can apply security to each tab so that staff can access the specific reports based on area of ministry.

This example uses the 3 Dock Container module and several of the Social category modules. It

also uses the Advanced HTML module and Hyperlink Manager within the module to create links to documents.



Counseling (optional)

The counseling feature enables your organization to record and secure confidential information for the counseling ministry. Along with recording counseling notes, you can customize counseling concerns, counseling restrictions and counseling statuses. Restrictions display on the **Person Detail** page as a means to communicate with other staff when an individual should be restricted from a specific area or subtlety flag a record. You can also customize the Counseling Status Lookup to display a symbol or letter for flagged records.

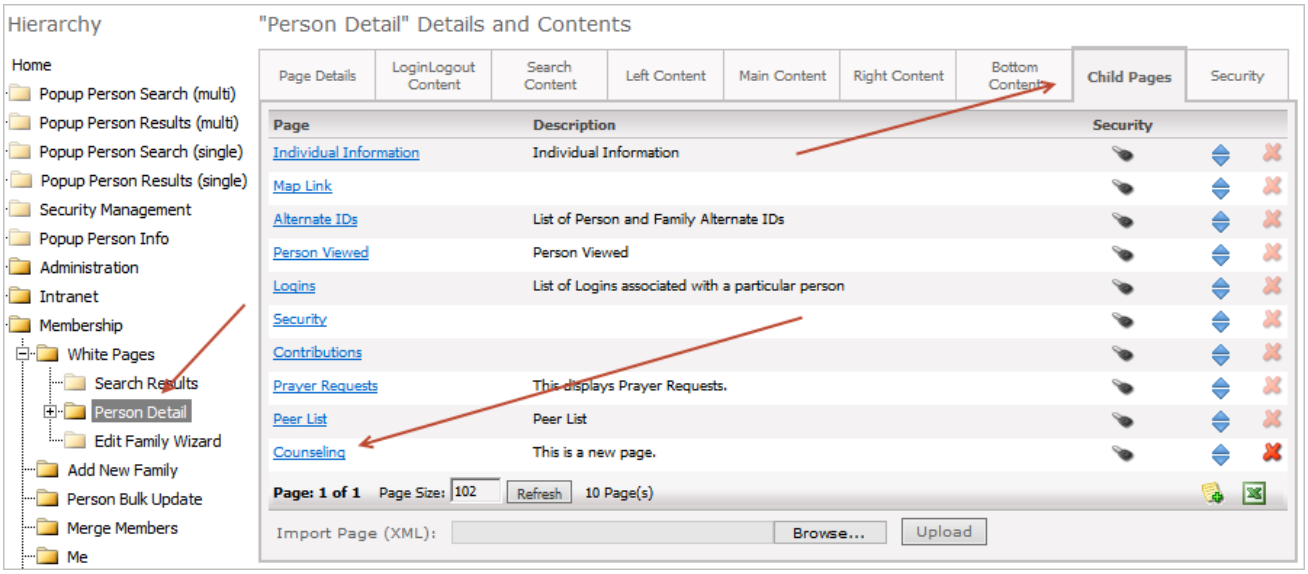
Setup the Counseling Feature

Create a Ministry Tag consisting of existing records you want to identify as counselors. Add this tag # to the **Counseling Team Member Profile Organization Setting**. You can obtain the profile_id from the URL when you select the Tag (http://arena/default.aspx?page=25&profile=171), or in the core_profile Arena SQL table.

Customize the **CounselingRestrictionIdentifier Organization Setting**. The default setting [R] displays on a record where the "Show Restriction" Lookup value is set to "True." You can change the default "R" value by entering the desired value, such as * in the Value field.

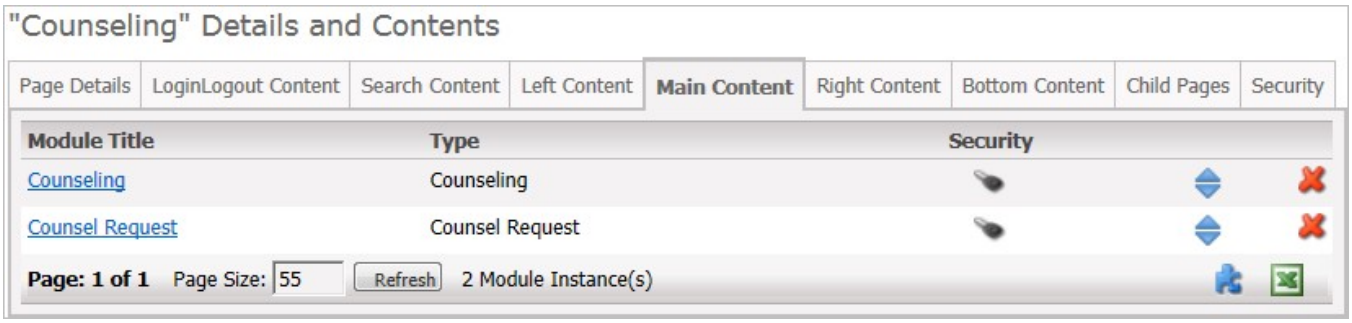
Customize Counseling Pastoral Concerns, Counseling Restrictions, and Counseling Status Lookups. Add "true" to a Counseling Restriction to allow users to enter a note for the restriction. Add "true"

for Show Restriction to a Counseling Status to display the Restriction Identifier for the status. Add "true" for Set End Date for a Counseling Status to allow user to set an end date for the status.



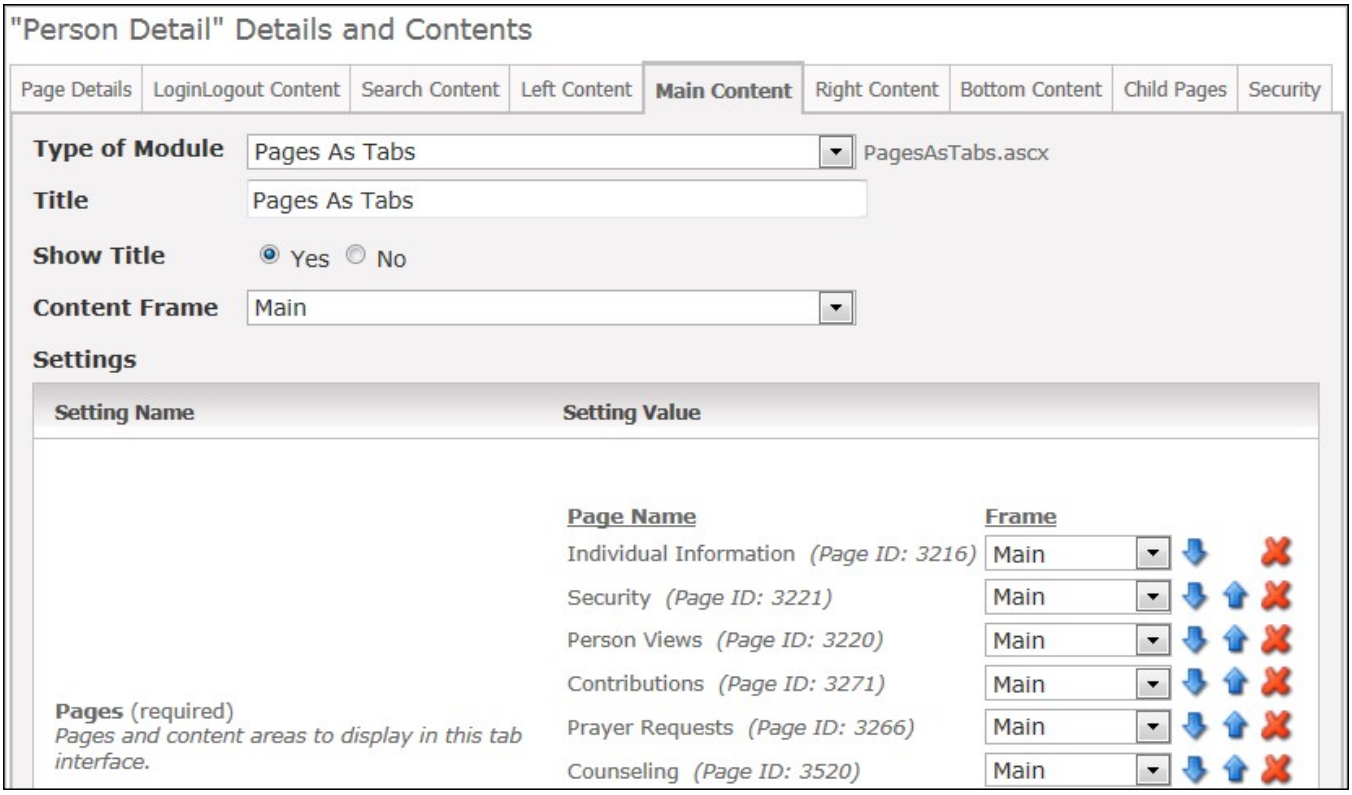
Add a Counseling child page to the **Person Detail** page. Set to not display in navigation.

Add the Counseling and Counseling Request modules to this page.



Set security for each module. Users with view and edit permission for the Counseling Request module can create a new counseling request. Users with **View** and **Edit** permission for the **Counseling** module have full access to Counseling.

Add the new **Counseling** page as a tab to the **Person Detail** page, as shown below.



Customize the Counseling Request System Email.

Member's Responsive Portal

The Member's Responsive Portal provides an optimal viewing and interaction experience for your members across a wide range of devices. It makes it easier for your members to read and navigate your website with minimum resizing and scrolling.

The Member's Responsive Portal is available on portal 4 if you have a new installation (or a different portal number if you have been using Arena for some time and have other portals). The Member's Responsive Portal can be used in place of the Member's Portal 2.

To use the Member's Responsive Portal, customize the following areas in Administration: Portal List, Templates, Page and Menu Names, and Color Scheme.

Portal List

Templates

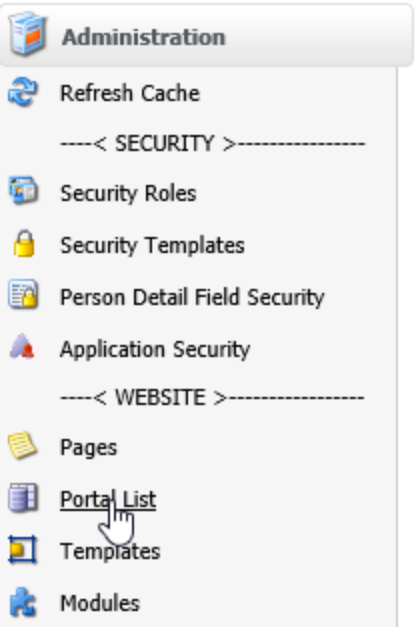
Webpage Name and Menu Name

Webpage Color Scheme

Portal List

To use the Member's Responsive Portal, remove the **ArenaWeb** portal as the default domain and add the **Member's Responsive Portal** as the default domain.

From the **Administration** menu, click the **Portal List** option located under the WEBSITE heading.

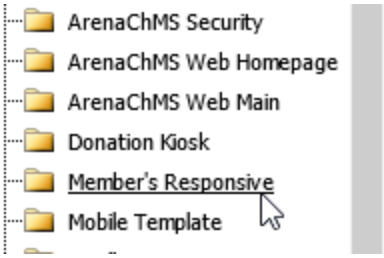


On the list of portals, click the ***ArenaWeb*** link to display the detail page for the portal. Locate the **Default Domain** setting. Write down the information in the field (the copy/paste function can be used) then delete the information in the field. Click the **Update** button to save the changes.

On the list of portals, click the ***Member's Responsive Portal*** link to display the detail page for the portal. Locate the **Default Domain** setting. Enter the information or use the paste function to update the field. Click the **Update** button to save the changes.

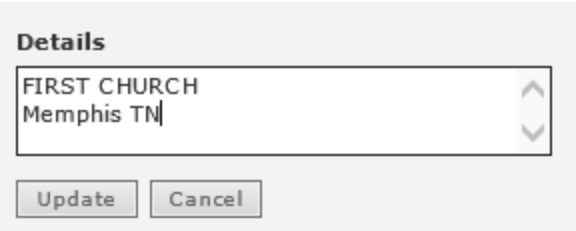
Templates

From the **Administration** menu, click the **Templates** option located under the WEBSITE heading. Click the ***Member's Responsive*** folder link to display the template contents page.



From the template contents page, you can edit different content sections of your webpage. For example, to add your church's name to your webpage click the **Header Content** tab. Click the ***Add*** link to create a New Module. Click the ***New Module*** link to display the **Settings** page.

In the **Details** field, type in your church's name and location then click the **Update** button. If you are already logged in to your website, refresh cache to view your changes.



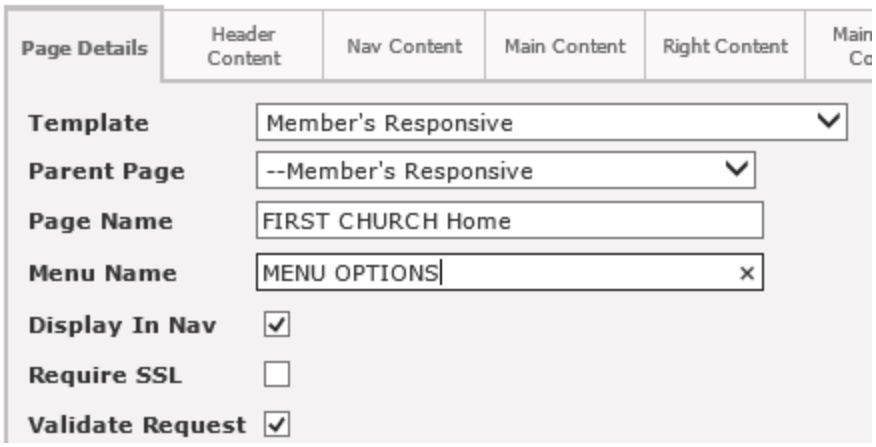
To add your church's address to the webpage, click the **Bottom Middle Content** tab. Click the ***Add*** link to create a New Module. Click the ***New Module*** link to display the **Settings** page. In the **Details** field type in your church's address then click the **Update** button. Refresh cache to view your changes.

If you are familiar with HTML, more customized editing can be made on your webpage. On the **Settings** page of any Content Module Instance, click the **True** radio button for **Enable Editing** to display the **Edit** icon on your webpage. On your webpage, click the **Edit** icon to display an HTML editor for that content section.

Webpage Name and Menu Name

To change the **Page Name** and **Menu Name** of your webpage, go to the **Pages** option on the **Administration** menu. Click the ***Member's Responsive Portal*** folder link then click the ***Home***

folder link. Click the **Edit Details** button to display the **Details and Contents** page. Enter your Page Name and Menu Name in the fields then click the **Update** button. Refresh cache to view the changes on your website.



Webpage Color Scheme

Several color scheme options are available and can be customized by editing the Bootstrap CSS Include field. To change the color scheme go to the **Portal List** option on the **Administration** menu. Click the ***Member's Responsive Portal*** name link.

In the **Bootstrap CSS Include** field, remove 'cosmo' and replace with one of the following CSS options:

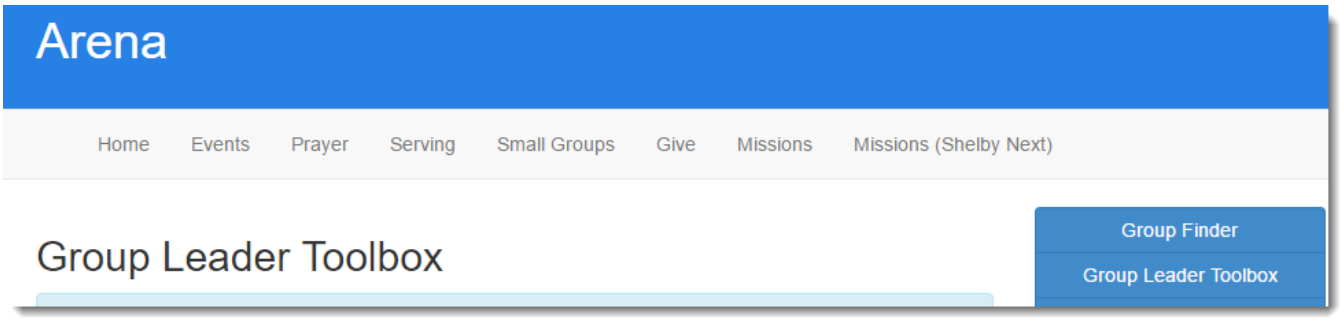
- Cyborg (CSS/cyborg.bootstrap.css)
- Darkly (CSS/darkly.bootstrap.css)
- Flatly (CSS/flatly.bootstrap.css)
- Sandstone (CSS/sandstone.bootstrap.css)
- Slate (CSS/slate.bootstrap.css)
- Spacelab (CSS/spacelab.bootstrap.css)
- United (CSS/united.bootstrap.css)

If you have a custom bootstrap CSS to use, copy it to the CSS folder under Arena (C:\Programfiles\x86\Arenachms\Arena\CSS).

Additional CSS themes can be found at Bootswatch.com.

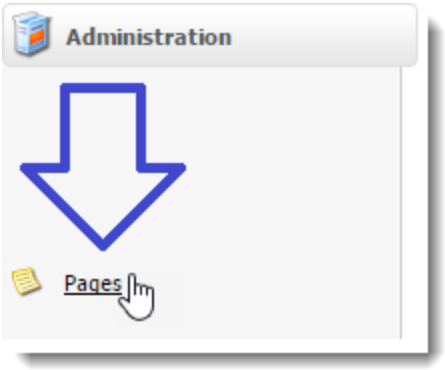
Responsive Group Leaders Toolbox

The Responsive Group Leaders Toolbox is used by a group leader to manage groups online.

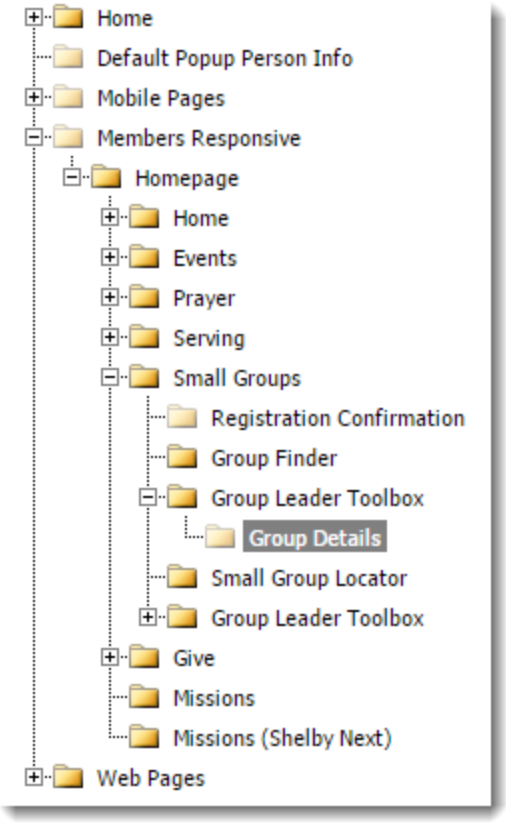


To manage some of these settings from Arena, use the following steps.

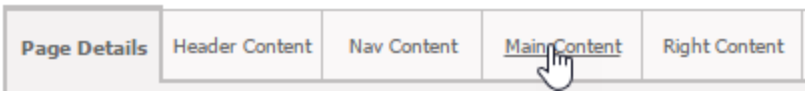
1. From the Administration menu, select the **Pages** option.



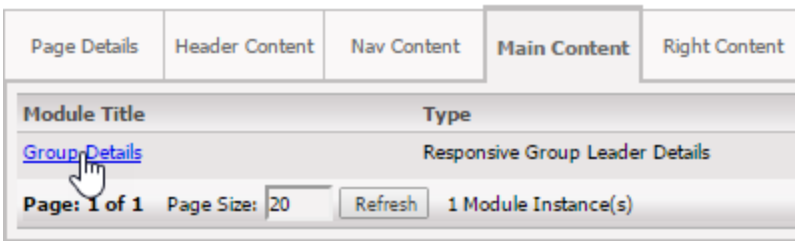
2. Next, Navigate to the **Group Leader Toolbox** > **Group Details** folder.



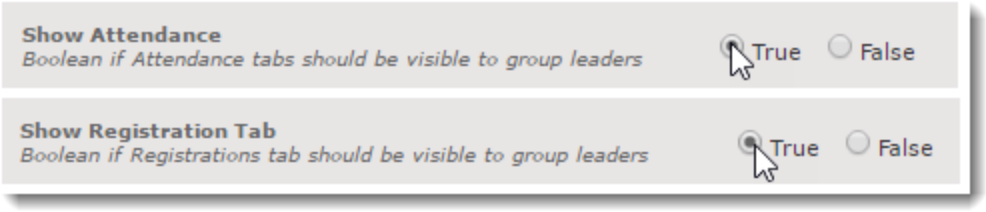
3. Click the **Main Content** tab.



4. Next, click the ***Group Details*** link.



5. Select any options that you would like to change. For example, the **Show Attendance** or **Show Registration Tab** options.



6. When you are finished making your selection, click the **Update** button at the bottom of the window.

Implementing Specific Features

Identify and evaluate each feature for implementation and customize specific options for each feature. Some options are module settings while others may involve agents, system emails, organization settings, person attributes, lookups and/or security.

Use the following help pages as a guide to review and customize specific features.

Membership

Person Detail Page

Consider using the optional **Dockable Person Details** page so each user can customize the Person Detail. To implement, load the Dockable Person Details from the Arena Hub.

Add New Family

Review all associated **Lookups**. Consider changing the order of Membership Status Lookup so the default status is in the first position.

Person Bulk Update

Set the **Secure Fields** module setting on the Bulk Update module to “True” in order for Arena to honor security for all associated fields on the **Person Bulk Update** page.

Merge Members

Customize the **Delete Merge Organization Setting**. Set to "True" to delete duplicate records, once merged.

Consider implementing the option to enable general users to 'request' records to be merged but select users to complete the merge and customize the email address of the person to notify of merge requests to the Merge Request Recipient Organization Setting. Identify the two different security roles, assuming one grants permission to select records to merge and the other completes the merge. For the security role of users who can select (request) records to merge, set permission to view the **Merge Members** page and Member Merge module. For the security role of users who can complete (approve) the merge process, set permission to view the **Merge Members** page to view, edit and approve the Member Merge module. Customize the **Merge Person Request System Email**.

Active Campaigns

Create campaigns on the **Administration** menu using the **Campaign Administration** option.

Review the **Campaign Next Family** module and customize as needed.

Review the **Campaign Family Status** lookup and customize as needed. (This lookup determines the call options and how many times a user can select the same result before the family is "Complete.")

Metrics

Customize the **Metric Chart** module on the **Metrics** page. For example, use the Metric ID to set a specific metric to display then you can set security for the specific module. This option applies to metrics with no child metrics.
Consider setting security for specific metrics.

Mailing

If using Mailroom, install the **Mailroom Service** on the Arena server. Technically, **Mailroom** can be installed on the Arena server or on a completely different server as long as the Mailroom Service is installed and the Mail Room Server Organization setting points to the server where Mailroom is installed.

Customize **Mailroom Application** settings on the **Application Settings** page. For Arena Hosted install Mailroom on each workstation. Enter the server name for Shelby v.5 workstat folder in the Mailroom Server Organization setting. We recommend using a mapped drive.

If using Mailing for bulk mail, this requires a subscription to Shelby Mailroom. From the mailroom DVD, install Mailroom on the server (if using Arena Hosted, install on individual workstations) and the Arena Agent. If you would like information about Mailroom, please contact Shelby Systems at

(800) 877-0222.

Install **.Net 4.0** and **Report Viewer** (8.0, 9.0 and 10.0) on all workstations using the Mailing application.

Public and My Lists

- Customize **List Configuration** so applicable criterion are available in My List and Public Lists. (Be sure to set module setting to honor security permissions for both lists.)
- To restrict access to List Types, consider copying the **Report Wizards** module to the same page, and adjust module settings for each module instance. Set security so that only one module displays for each user.
- Customize the **List Category Lookup** to give users the ability to organize lists by department and ministry.

Family Registration (available for Self-hosted clients only)

- Review and customize **Family Registration Application** settings such as default member status, attribute groups, default campus, and allowing Check-In. (Be sure to set the Small **Group Category ID** in the Family Registration application.)
- Determine the process for volunteers and staff for entering visitor information to insure a speedy check-in. Remember, additional information can be entered later.
- Establish the process for managing any duplicates that may be created.

Campaigns

- Customize the **Campaign Family Status Lookup**.
- Customize the **Campaign Next Family** module.

Prayer

Customize the **Prayer Category** and **Prayer Source Lookups**.

Set security for users who can approve prayer requests, approve answers, approve comments and view private prayer requests.

Customize the **Prayer Request Days Active** and **Prayer Request Renewals** Organization Settings.

Start the **Process Prayer Requests** agent and be sure to add the Prayer Page URL to this agent.

Customize the Prayer Request Comments, Prayer Request Expire No Renewal, Prayer Request Expire and Renewal System Emails.

Groups

After assessing ministries that use Groups, customize or create **Cluster Types** as needed. Be sure to specify to allow registration, the level for unassigned registrants, levels to email registrant notifications and to allow occurrences or not.

Customize the **Small Group Tab Module** on the Groups and Group Details pages.

Customize the **Small Group Role, Small Group Topic, Small Group Type, Age Range** and **Preference Lookups** so that prospective group members can easily find a group that fits their interest on the **Locator** page of your Arena-managed website, and staff can apply requested preferences on the **Add Registration** page. Lookups apply to all Groups.

Verify that **Attendance Type ID** and **Default Occurrence IDs** on the Small Group Table Control module are valid.

Verify that the **Small Group Registrations Agent** is using Add Registration or Group Locator.

Customize **Group Leader Registration** and **Group Member Registration System Emails**.

Tags

Once you determine how your organization will use Tags, it is important to understand **Tag Security**. It is common for Arena Administrators to create Root (first level) Ministry, Serving and Event Root tags for each department and set security at the root tag. As Child Tags are created for Root tag, security cascades to child tags.

Evaluate **Profile Details** and **Profile Tab Control** modules on the **Profile Member Details** page, and the **Profile Activity** and **Tag Member Activity** modules on the **Tag Member** page.

Customize as needed.

Serving Tags

Customize the Add Profile Member module on the **Add Volunteer** page to designate a default member status as users enter prospective volunteers.

Customize Critical Profile Days and Warning Profile Days Organization Settings and start the Process Critical Serving Agent. Once settings are in place, Arena sends an email to serving tag owner when the status of a prospective volunteer in a Serving Tag has not been changed in the number of days specified in the Organization Settings. You need to add a valid Arena URL (i.e., http://arena.church.org/) to the Arena URL field in this agent.

Customize the Volunteer Signup System Email that is sent to prospective volunteers when the individual signs up on the Arena-managed website or a staff member uses the **Add Volunteer** option.

If using the **Serving Reminder** option to remind workers of the next time the person is expected to serve, customize the Serving Reminder System Email, start the Serving Reminder Agent and add future occurrences to applicable Serving Tags. Emails are sent to connected tag members according to the occurrence date.

Customize Ministry Type, Serving Commitment, Commitment Level, Serving Classification, Serving Duration and Tag Status Lookup. Use the Include as Critical "Y" indicator for any existing or new status you want to trigger an email notification to the tag owner(s) of prospective volunteers when added via your organization's Arena-managed website or **Add Volunteer** option. Keep in mind Connected, In Process and No Contact statuses are in use by other modules and settings. All other tag statuses apply only to Serving Tags.

If using the Volunteer Scheduling feature, review and customize the elements below:

- Customize the Ministry Type, Serving Commitment, Commitment Level, Serving Classification, Serving Duration and Tag Status Lookup.
- Customize Volunteer Category Title, Volunteer Request No URL, Volunteer Request Yes URL and Volunteer Service Name Organization Settings.
- If using the **Class Level** option to identify Class Level: create an Attendance Type Category and Attendance Type(s) for each class and add the Attendance Type Category ID to the Class Level Organization setting.

Event Tags

Customize the Event Profile Detail module on the **Event Tags** page. Consider setting the Show Account Numbers module setting to "True" so users can enter the account number per fee or payment. This is particularly beneficial when exporting transactions to V5 General Ledger.

Set the additional Edit Registration and Allow Refund security permissions, by tag and user, and the **Occurrence Detail** page so that users can create occurrences for event tags. A future occurrence is required in order for an event tag to display on the external website.

Start the Event Email Agent. Be sure to enter a comma-delimited list of Tag IDs for which to send email reminders.

Customize the Event Visibility, and Topic Area Lookups. Use this lookup to specify which topics to display on Arena's external website calendar.

From the **Administration** menu, click the **Payment Gateways** option located under the CONFIGURE heading to add a Payment Gateway to enable online event registration payments. Connect the payment gateways to the applicable modules.

Verify a **General Ledger Export** page is available. This page is required in order to use the **Export** button on the **Event Tag Transactions** tab/page. This page requires the Event General Ledger Export (pop-up) module and is referenced in the **Event Detail Tab** module.

Customize Event Refund and Event Registration Notification system emails.

Consider editing the Event Profile Detail/Tools File module setting to enable the full RAD Editor. This setting requires the file path to the RAD editor tool (e.g., ToolsFileAdvancedText.xml).

To enable users the option to adjust the default registration steps, add the **Event Registration Steps** page with the Registration List module. Also, you need to change the **Registration** page setting on the Event Detail module on the web portal. Custom Registration steps apply to ALL Event Tags and users need to replicate the same steps for all events.

If using a third party resource management application:

- Add the account information on the **Facilities Management Setup** page with the Resource Manager Setup module. Arena integrates with MinistrEspace facilities management resource.
- Set the Event Resource and Event Resource Admin Role settings on the Event Profile Detail module.

- Start the Update Resourced Events Agent.

Volunteer Tracking

If using **Volunteer Tracking**, review and customize the below elements:

Customize the Ministry Type, and Commitment Types Lookups.

Customize Volunteer Category Title, Volunteer Request No URL, Volunteer Request Yes URL and Volunteer Service Name Organization Settings.

If using the **Class Level** option to identify Class Level: create an Attendance Type Category and Attendance Type(s) for each class and add the Attendance Type Category ID to the Class Level Organization setting.

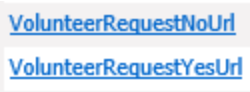
If using the **Service View** option, review and customize the below elements:

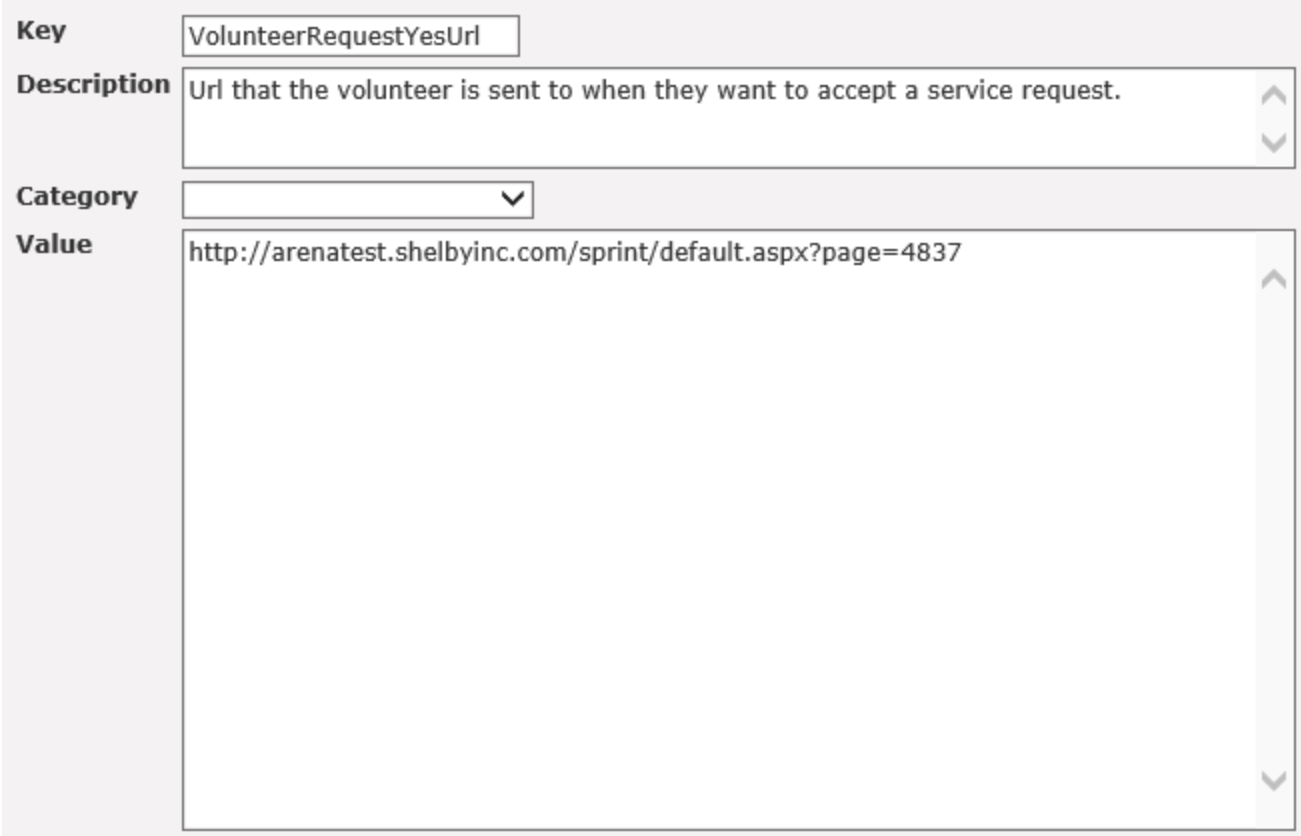
Serving tags must exist in order to create services.

By default, the Service View and Team Member Detail pages and modules require the **Arena Administrator** and/or the **Volunteer Service Can Create Teams** security roles.

In order for a staff member that is not an Arena Administrator to be able to edit a service, they need the **Volunteer Service Can Create Teams** security role.

The VolunteerRequestYesUrl and the VolunteerRequestNoUrl organizations settings should also have a valid value pointing to the new Volunteer pages on the web portal.

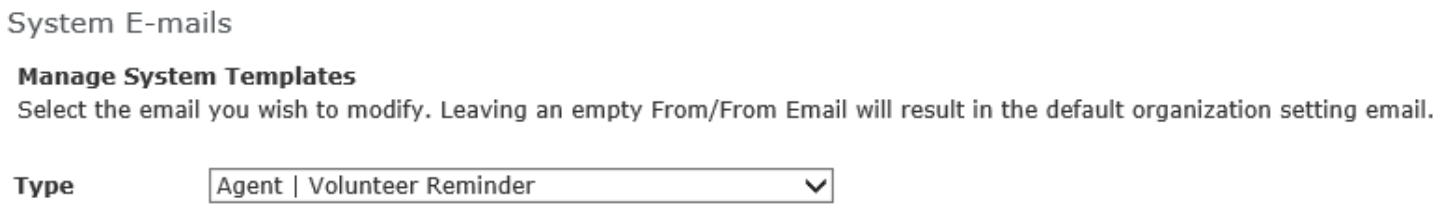


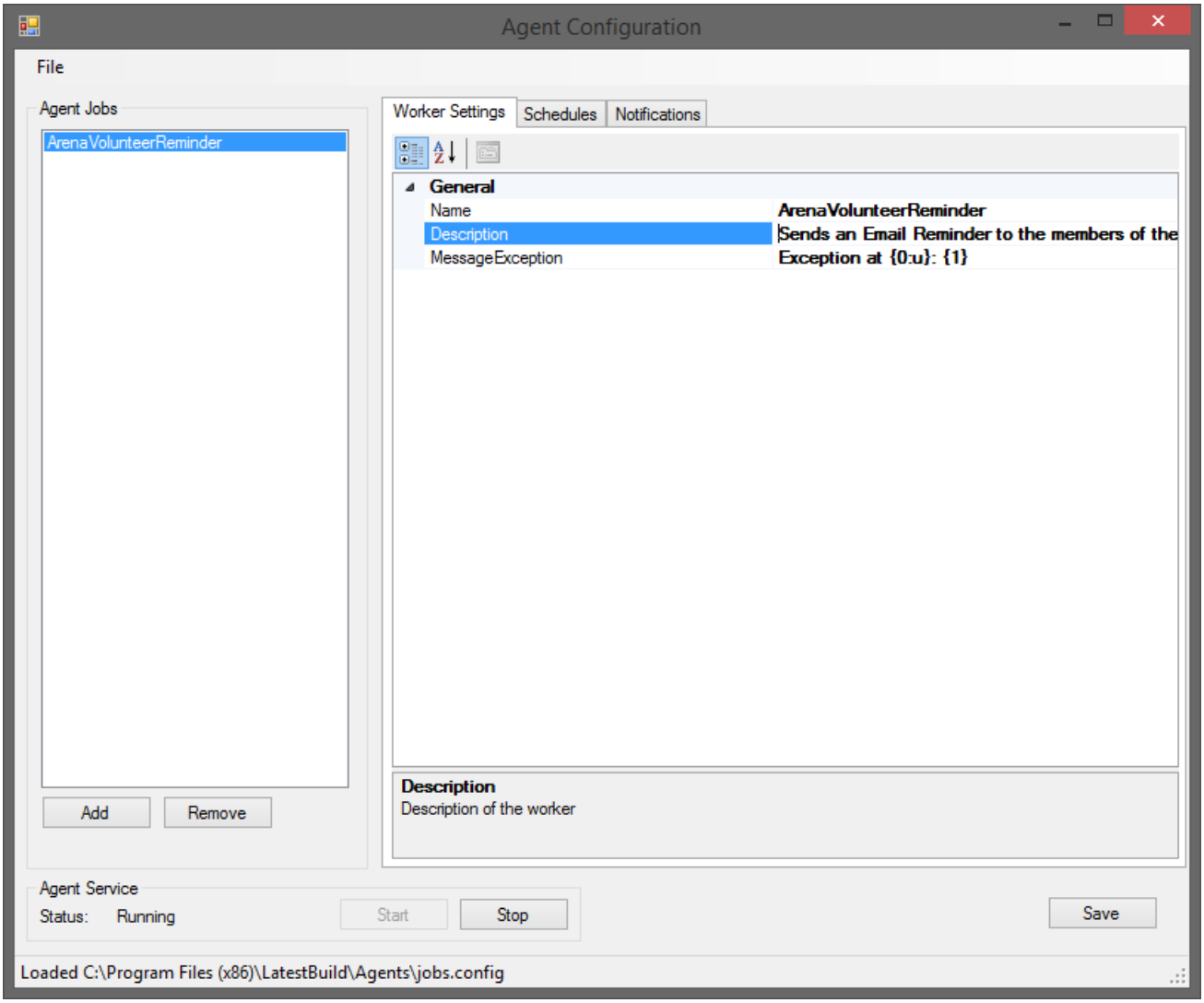


Two new pages are also created in the web portal for the volunteers to accept or reject their availability for a service. These pages must have the All Users security role in order for the volunteers to be able to accept or reject a volunteer service opportunity without having to login to the web portal.

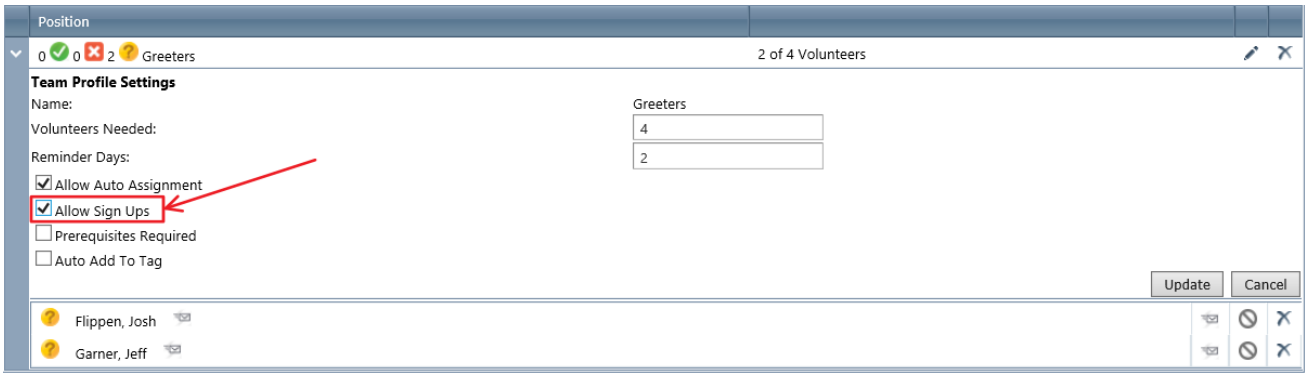
Make sure that the Organization URL is properly entered under Administration > Organization in order for the email communications pertaining to Services to work.

In order for the reminder emails to work, the Agent | Volunteer Reminder system email and the Agent.Worker.ArenaVolunteerReminder agent job must be configured.





In order for services to be available for sign up on the web portal pages, a service must have the **Allow Sign Ups** option enabled for the position.



Communications

From the **Administration** menu, select the **Email Configuration** option located under the ADMIN heading to configure the email server.

Customize the Mail Merge module on the **New Communication** page. (If using thresholds, consider adding the Communications Approval List module to a new page in order to centralize all pending communications to one page for communication approvers.)

If using SMS via email:

- Set SMS via Email Enabled Organization Setting to True.
- Verify all desired ISPs are available in the SMS Provider Lookup.
- Add phone numbers to all applicable records with SMS checked and provider selected.
- Verify your email limits can accommodate the increase emails.

If using SMS via StrikeIron:

- Verify that StrikeIron has the account as a Global 2.5 account.
- Set SMSViaEmail Enabled Organization Setting to False.
- If not currently available, add the following Organization Settings and enter the applicable values for each, as provided by StrikeIron: SMSProvider_UserName, SMSProvider_Password

To enable the option for email recipients to unsubscribe to emails, add a hidden page to the external portal with the Bulk Email Unsubscribe module and reference this page on the communication's mail merge module.

From the **Communications** menu, click the **Previous** option to set security permissions to view only to limit previous communications sent by the current user logged in.

Consider setting up the **Email Clean** option. It uses the Email Clean Agent. The Email Clean automation agent can delete or inactivate bad email addresses from the Arena database. It monitors a specific POP3 email account looking for bounced messages from the Arena membership and newsletter subscription tables. Arena flags email addresses determined to be 'bad' as inactive and noted with an appropriate reason. Specific setup instructions can be found on the Community/ArenaWiki/**Arena Agents** page.

Consider adding a default name and email address to a communication template.

Due to email security and spam issues, email providers have tightened up rules regarding sending and receiving emails. Below is an explanation of the business rules Arena follows when sending emails.

- The "From Email" domain is not equal to "SmtpFromDomain"
- Set "From Email" = Organization Email

- Set “Sender” = Organization Email
- Set “ReturnReceiptAddress” = Organization Email
- IF “Reply To Email” is blank Set “Reply to Email” = Original “From Email” address ELSE No Change
- If “From Email” domain is equal to “SmtpFromDomain”
- “From Email” = No Change
- “Sender” = No Change
- “ReturnReceiptAddress” = No Change
- IF “Reply To Email” is blank Set “Reply to Email” = Original “From Email” address ELSE No Change

Check-In

If using the Check-In application, install .Net 4.0 (or newer) and Report Viewer (8.0, 9.0 and 10.0) on all PC workstations/kiosks and verify kiosks connect to the domain.

Verify printer and kiosk connectivity. Install updated driver(s) if necessary.

Verify Kiosk Schedules and printer connection.

Create Check-In security roles for both Check-In Administrator(s) and volunteers.

Customize Check-In Application Settings.

If using roster reports for attendance, add Attendance Upload module to the desired page or a new page.

Identify label needs. Minor customization can be accomplished using Report Builder.

If you plan to customize existing themes or add new themes, be sure to check out the White Paper on The Arena Community/**Downloads** page.

If using tablets via Check URL:

- Create applicable Security Roles.
- Add Security Roles IDs to CheckInAccessRoles Organization Setting.
- Set Arena to Forms authentication.

- Setup a workstation to use a wireless network.
- Install/launch Check-In.
- Get IP address from Arena database (dbo.comp_kiosk_ip).
- Set the tablet to use this IP address.
- In SQL, change computer name of system id tied to the recorded IP address to match that of the iPad device (dbo.comp_system).
- Assign a printer to each kiosk by name. You will no longer be able to use the kiosk default printer option.

Contributions

Customize the Contribution Fund Category, Contribution Range, Contribution Source, Contributions Adjustment Type and Contributions Motivations Lookups.

Review and customize all associated modules. To allow refunds, set the public site to "true." Set the Default Years contribution history to display on the **Person Detail/Contribution** tab on the Contribution List module.

Install Arena Hub Contribution Reports particularly if using the Donation Kiosk feature.

Add Payment Gateway provider. Connect the payment gateway accounts to the applicable modules.

Customize the Contribution Information section on the **Person Detail** page. (E.g. Select print or email statement, PIN number for email statement recipients, and Sub-donor.)

If using check scanners, verify all current drivers are loaded. (Supported scanners are Canon CR25/55, 50/80, and 135/180/190. Ranger drivers are required for some Canon scanners. If using existing scanners, verify that the scanners can produce a text output in notepad.)

If applicable, customize the Contribution Sub-donor Title Organization Setting and set the Show Sub Donor module setting to "True" on the **Person Detail** page.

If using online giving:

- From the **Administration** menu, click the **Payment Gateways** option located under the CONFIGURE heading to setup your payment gateway account(s).
- If using a provider where redirects are used, provide a return redirect URL (e.g.,

www.organization.com/payment.aspx) to your provider.

- Customize Giving Batch Name Organization Setting. The default value is “Online Batch.”
- Customize the Repeating Payment Wizard module. Refer to the Implementing Arena-Managed Website Features in this document for additional setup information.
- Setup your member login pages. Refer to the Implementing Arena-Managed Website Features section.

If emailing contribution statements:

- Start Email Contribution Statement agent.
- On the **Person Detail** page for each recipient, select email statement and a enter PIN. Both fields are required. PINs can be up to ten characters.
- Select a contribution report on the Email Statements module.
- Customize Online Contribution System Emails.
- Customize the Online Giving Rejected Contribution System Email.
- Set the Email Statements Contribution Statement Report module setting to the desired statement on the **Email Statements** page.

If using Donation Kiosk:

- Install the Donation Kiosk from Arena Hub.
- Install Contribution Reports from Arena Hub.
- Select Funds to make available on the Kiosk Enter Amounts module on the **Enter Amounts** page.
- Customize Kiosk Swipe Card module on the **Enter Payment Info** page.

If using the Contribution Application:

- Customize Contribution Application Settings. Changes are global for all users accessing the Contribution application. You can make user specific changes in the application settings for each workstation.
- Set Contributions Application security.
- Install .Net and Report Viewer (8.0. 9.0 and 10.0 versions) on all workstations using the Contributions application.

Missions

Add an integrated payment gateway account on the **Payment Gateways** page.

Customize the Mission Arrangement, Mission City, Mission Country, Mission Purpose, Mission Region, Mission Register Type, Mission Support Type, Mission Trip Role, and Mission Trip Status Lookups. Users can also add values as needed.

Customize Mission Registration module. (This module contains the Require Goer Approval setting to prevent on-line contributions for non-approved mission trip goers (travelers). To restrict users by Mission Type, consider adding the module to the same page to limit access to specific trips by user.)

Customize the Mission Details module on the **Mission Detail** page. (Use this module to limit available tabs and set permission for users who can reassign mission trip payments to other travelers.)

Customize the Mission Trip Registration Deposit Reminder, Mission Trip Registration Reminder and Mission Trip Contribution System Emails.

Start the Mission Trip Deadline Reminder and Mission Trip Registration Deposit Reminder Agents.

Set Security Roles to specify which users have access to mission trips while processing contributions.

Start the Mission Trip Deadline Reminder and Mission Trip Registration Deposit Reminder Agents.

Customize the Mission Trip Registration Deposit Reminder, Mission Trip Registration Reminder, and Mission Trip Contribution System Emails.

Assignments

Set the Person Detail Show Workflow module setting to “True” on the **Person Detail** page in order to enable Assignment Workflows from the **Person Detail** page.

Verify the AssignmentBaseDetailURL Organization Setting is set properly (e.g., http://arena/default.aspx?page=3210&checkId=1). (To check the proper page number, go to Administration/Pages and expand pages to the Home/Assignments/Assignment Type/Assignment Detail. If needed, replace the above reference page ID (3210) with your Arena Assignment Detail

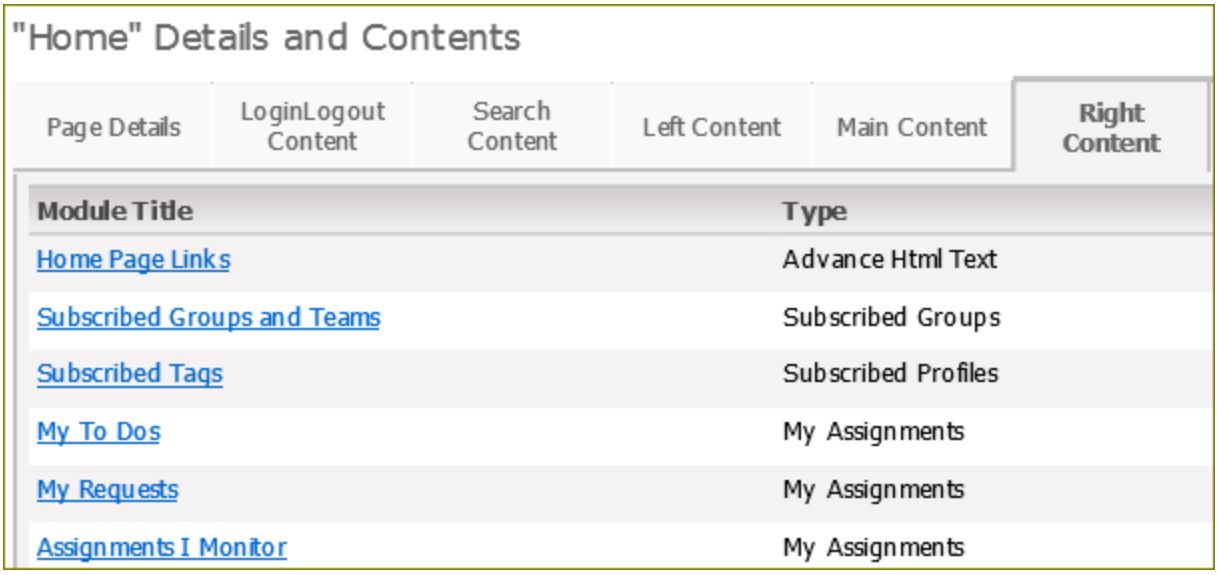
page ID.)

If using Assignment Workflow, start the Assignment Process Start Agent.

Set security for each Assignment Type. (Assignment security is like Tag security. Users need **View** and **Edit** permissions in order to initiate and edit an assignment.)

Customize the Assignment System Emails.

To display links on the Arena home page for Workers, Requesters, and Subscribers add the My Assignments module to the Right Content of the Home page. Add the module three times changing the Mode for each module instance and add a Title for each instance.



Classifieds

Verify the **ClassifiedApprovalPage Organization Setting** is set to the correct page. This page should be the **Classified Approve** page with only the security roles that are set to approve classifieds. These roles should have View, Edit and Approve permissions.

Start the **Classified Cleanup Agent**. Be sure to customize the agent settings.

Verify **Classified Approval Page Organization Setting**.

Customize **Classified Expire Days Organization Setting**.

Customize **Classified Category** and **Classified Type**.

Set security for users who can view and approve.

Website Structure

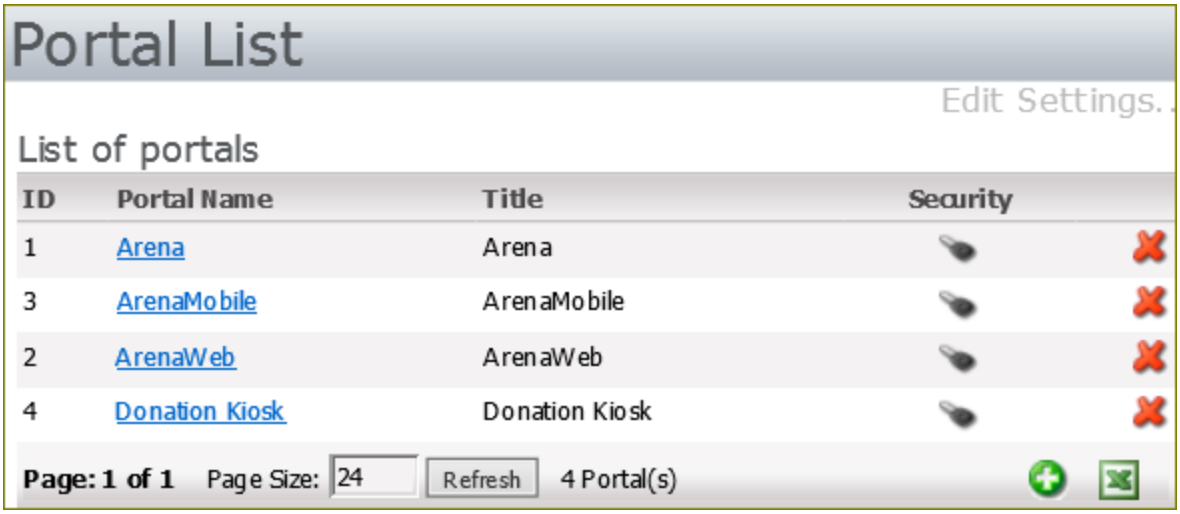
Before customizing any of Arena features, it is a good to start with understanding Arena's structure. Arena is a web-based church management software designed to complement your organization's ministries. Users can access your organization's Arena from any browser (e.g., Internet Explorer, Google Chrome, Safari, or Firefox). (Check with Arena Support for version validation and if compatibility view is required. For some specific functions such as, the Check-In click-once application, Mailing, Family Registrations (Self-hosted only) and Contributions click-once applications Internet Explorer® is required due to using .NET framework.)

Portals

Each Arena installation includes three portals. Each portal is a separate set of pages, modules, and security settings. Portals use the primary domain information from your IIS (Internet Information Services) website host headers to direct web traffic from a particular domain to a specific Arena website such as your Arena-managed website. Each portal is designed to have a distinct URL so keep in mind which portal you are accessing within the same browser. Toggling between portals in the same browser session could result in the browser caching to the previously selected portal.

If your organization elected to install two instances of Arena- Production and Sandbox, you have a total of six default portals- the three default listed portals for each instance. The instances are separate and do not have any shared files or data. (Work performed in an Arena Sandbox instance does not convert nor connect with the Arena Production instance. For Hosted clients, you can request a local installation for testing purposes.)

The paths in Arena's web.config file route users to the specified home page and login. When a user accesses Arena, regardless of the person's location, the web server consults the web.config file as referenced in IIS. The web.config file has a default portal ID. The web server then queries the Arena database to determine the page to display and if the user is required to login.



- **Arena (Portal 1 = Staff)** – This is the primary portal designed to be used by staff on a day-to-day basis. This is a default portal.
- **Arena Web (Portal 2 = Members)** – This is the member portal designed to be used by prospects, guests and members of your organization. This is a default portal.
- **Arena Mobile (Portal 3 = Staff)** – This is the mobile portal designed for staff and is accessible using any browser-enabled smart phone. This is a default portal.
- **Donation Kiosk (Portal 4 = Staff + Members)** – This is an optional portal you can install from Arena Hub where staff can process contributions from a browser enabled device using a card reader. (This is not a default portal but is available for download on the Arena Hub page.)

Click any portal to display the portal details.

Portal ID	2
Portal Name	ArenaWeb
Portal Title	ArenaWeb
Portal Description	Arena Church Ministry System: Turning Crowds into Communities Note: The Portal Description will be added as a 'description' Meta Tag to the HTML Header on each of the pages within this portal.
Portal Notes	
Default Page ID	Homepage (3059) ...
Portal Style Sheet	css/arena.css
Tree Style Sheet	css/treeStyle.css
Navigation Style Sheet	css/navStyle.css
Login Page ID	Member Login (3066) ...
Not Found Page ID	(not set) ...
Person Popup Page ID	Default Popup Person Info (3237) ...
Default Domain	
Mobile	☐
Authentication	Forms Authentication
JQuery Include	//ajax.googleapis.com/ajax/libs/jquery/1.8.0/jquery.min.js

- **Portal ID** – This is the ID number of the portal. When accessing different portals in the same browser, it is suggested to use the portal ID to point to the specific portal to avoid browser caching to the previous portal such as, http://arena/default.aspx?portal=1&refreshcache=true.
- **Portal Name** – This is the name of the portal.
- **Portal Title** – This is the portal title.
- **Portal Description** – This is the description of the portal.
- **Portal Notes** – This is an optional field for portal notes.
- **Default Page ID** – This is the landing page for the portal.
- **Portal Style Sheet** – This is the default cascading style sheet for the portal. You can set a different CSS for any page in the Page Details.
- **Tree Style Sheet** – This is the default page tree style sheet. This CSS is used for tree styles unless specified otherwise on the specific page.
- **Navigation Style Sheet** – This the default navigation style sheet. This CSS is used for tree styles unless specified otherwise on the specific page.
- **Login Page ID** – This is the page for members to login.
- **Not Found Page ID** – This is the page to direct users to when a page is not available.
- **Person Popup Page ID** – This is the page that displays the person pop-up information.

- **Default Domain** – This is the portal domain.
- **Mobile** – Check this box if the portal is for mobile devices.
- **Authentication** – Authentication options are Forms Authentication or Windows Authentication. Hosted clients use Forms Authentication. Self-hosted can select Forms or Windows Authentication.
- **JQuery Include** – This is the AJAX query to exchange data with the server and update parts of a web page without reloading the whole page.

Portal Separation

It is important to remember that each portal has a separate set of pages, security settings and permissions. For this reason, it is critical that no page or module reference a page or module in a different portal (e.g., crossing or jumping portals). Should such a reference seem necessary, you should instead copy the target page into the referencing page tree and then target that copy instead of the original page.

Portal Security

An Arena portal can be set to allow access by one of two methods. The first method is **Windows Authentication** where the username that the individual uses to log into their computer is passed to Arena as their user ID automatically (no password is required for login, as Arena assumes that Windows has already verified the User ID and Password via Active Directory).

The second method, **Forms Authentication** requires users to enter a user ID and password every time they access the Arena portal. In order for staff to access the Arena (internal) portal without using a VPN connection, set the portal to Forms Authentication so that users can access Arena using any Internet browser, while being secured using Arena Security Roles.

While your internal access to the Arena program (through the default portal 1) can usually remain in Windows Authentication mode, it is highly advised that you set any externally accessible portals to Forms Authentication to make sure your data remains secure.

Customization Options:

Arena has a default timeout setting of 10 minutes if no activity. This time can be adjusted in the webconfig file.

To use a different CSS, you first want to add the CSS file in the ~Program Files (x86)\Arena ChMS\Arena\CSS folder.

Making Portals Publicly Accessible

One of the largest advantages to Arena is the opportunity to have all three portals publicly accessible, using Arena's security to secure pages and modules for each user. At initial installation, all three portals are available while 'on campus.' At installation if unique URLs were not configured for the different portals, you and your staff can access each portal by adding the portal ID# to the URL, as shown below.

http://arena/default.aspx?portal=1 (staff portal)

http://arena/default.aspx?portal=2 (member portal)

http://arena/default.aspx?portal=3 (mobile portal)

http://arena/default.aspx?portal=4 (donation kiosk portal)

In order for any portal to be available off campus, you and your network/IT staff will need to configure each portal accordingly. Use the below checklist for your network/IT staff to configure the respective portals.

The below checklist is a guide for the applicable staff/contract person so allow enough time for the respective staff to familiarize themselves with the steps on this checklist and research any step where the person is not familiar.

1. Determine what subdomain to use for each portal. It is common practice to use something simple like e.g., my.church.org for the member portal and m.church.org for the mobile portal.
2. Update external DNS to point the subdomain (e.g., my.church.org) to a public facing IP address.
3. Update internal DNS to point the subdomain (e.g., my.church.org) to an internal server IP address

4. Update firewall/router to allow the HTTP/HTTPS traffic from public facing IP address to the internal server IP address (DNAT rule)

5. Optionally, update firewall/router to send outbound traffic from Arena web server on specific public facing IP address (MASQ rule).

6. Update IIS (Edit Bindings) to have host names linked to Arena site.

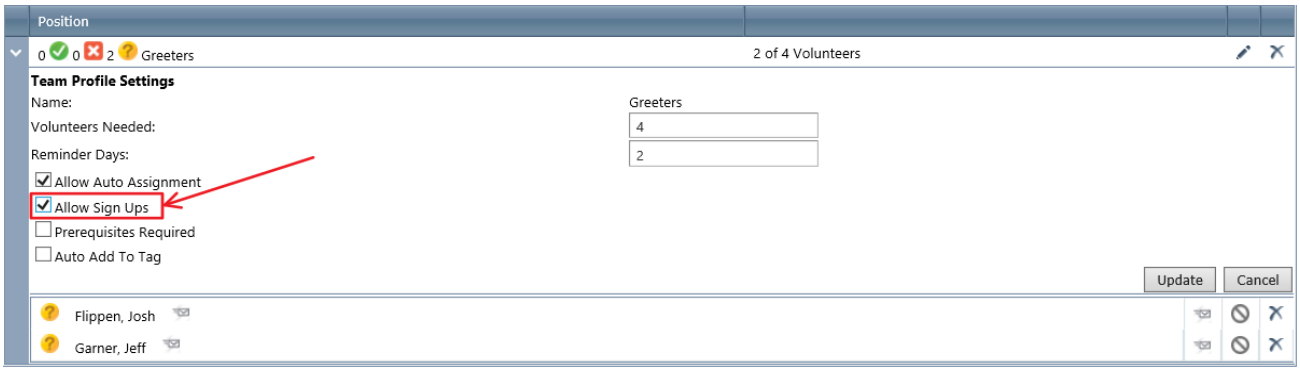
7. Update the Default Domain for the respective portal on the **Portal List** page in Arena to have host names linked to portals.

Requirements for Volunteer Web Portal

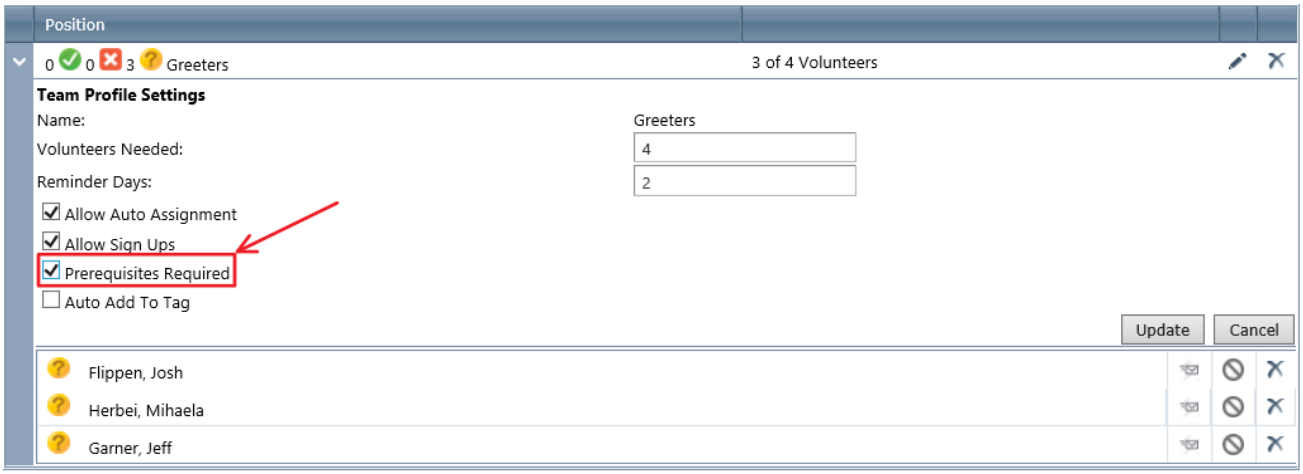
Users must have a login for the Arena Web Portal pages. The **Service List View** page exists behind the Members Homepage and requires the user to be logged in.

The VolunteerRequestYesUrl and the VolunteerRequestNoUrl organizations settings should also have a valid value pointing to the new Volunteer pages on the web portal.

For services to display in the Serving Opportunities data display, the service position must be marked to Allow Signups. Click the **Edit** icon for a position to check that the **Allow Sign Up** option is selected in Arena (portal 1).



Positions marked as **Prerequisites Required** requires that the volunteer signing up for a position to be marked on the service's serving tag as prerequisites being met on the Tag Member Details.



If a service is marked **Prerequisites Required** and a user attempts to sign up for the service but they have not been marked as having met the serving tag prerequisites, they receive an error message on the Save Member pop-up and the **Ok** button is disabled.

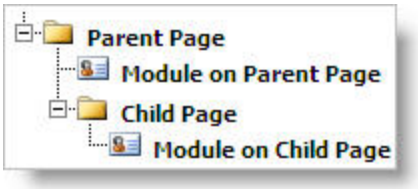
New Portals

You can elect to add additional portals. Follow the below steps to add a portal

1. From the **Administration** menu, click the **Portal List** option located under the WEBSITE heading. Click the **Add New Portal** icon to bring up the Portal Details view. Do not be concerned with the Portal ID being "-1" at first, as this is simply the default displayed since it has not yet been assigned an ID value.
2. Complete the Portal Name, Title, Description and Notes fields.
3. Select the **Default Page ID** as the homepage you've created in the Pages area of Administration, and the **Login Page ID** as the User Login page in the same page tree.
4. Enter the Default Domain as the domain name that users will be using to access this portal which cannot be the same as any other portal's Default Domain value.
5. Select your Authentication type.
6. Click the **Update** button to finish. At creation, new portals have security rights for the All Users role to View the portal, which is the only required security setting.

Pages

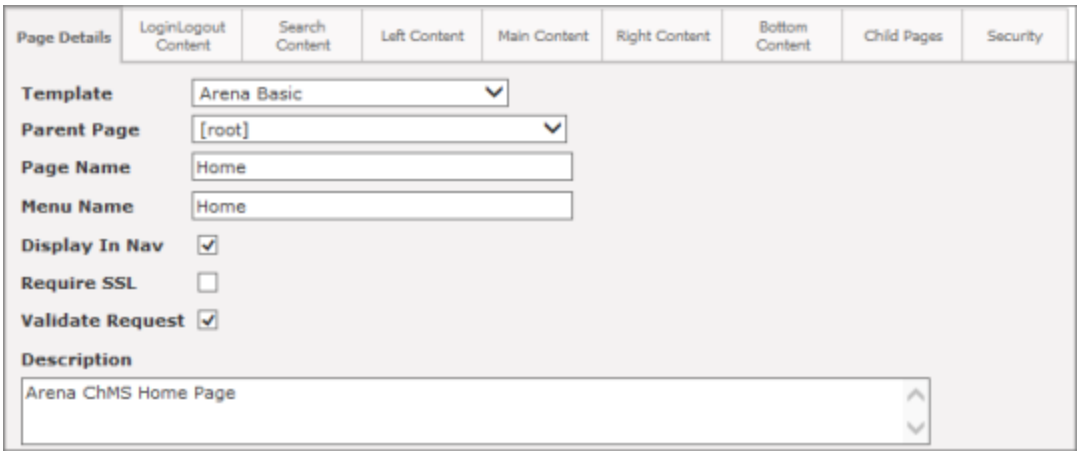
The page structure is how Arena defines website layout and navigation. It is frequently referred to as a page tree because it uses a hierarchy structure consisting of parent pages with one or more child pages that can be parent pages as well.



Your Arena installation includes three page collections. Each collection of pages represents the three default Arena portals. Each Arena portal has predefined page trees with applicable templates and modules. Pages display in an expandable tree view and represent the order in which they appear. Faded folders indicate that a page is set to not display in navigation. Click on a page to display the content tabs of that page. Templates determine the content area tabs. The content tabs contain the module(s) for the page. The majority of modules are on the **Main Content** tab of a page.

- **Home**: Portal 1 used by staff on a daily basis.
- **Mobile Pages**: Portal 3 used by staff via smart phones.
- **Web Pages**: Portal 2 used by members via a browser.

After selecting a page, click the **Edit Details** button to display the page details.



- **Template** – This is the template for this page.
- **Parent Page** – This is the page above the current page in the page tree hierarchy. You can move a page by selecting an existing parent page in the drop-down. All child pages stay bound to the moved page.
- **Page Name** – This is name of the page and displays in the navigation bar, if the page is visible. You can customize the name of any page.
- **Menu Name** – This is an additional page name for customized page tree structure.
- **Display in Nav** – Check this box to display the page in navigation. There are many Arena pages set to not display in navigation due to the links that connect one page to another.
- **Require SSL** – Check this box to use SSL (https) for a portal/page. You can apply SSL to any portal/page with the exception of Arena Check-In.
- **Validate Request** - Check this box to prevent cross-site scripting attacks. The installer checks this box on all pages except for page 2297 (Organization Settings) and page 32 (Role Details). Any page in Arena where this setting is set causes an error if it detects any dangerous input such as <script> tag or any HTML tags. In general, validate request on the new communications page (21 by default) and the page detail display page (page 34 by default) should be turned off.
- **Description** – This is the page description.
- **Page Settings** – This is where you can set options like the Page CSS, Navigation icons, and other settings specific to the current page.

Visibility

Occasionally you may find that you need to have pages in your page structure that you do not want to be visible in the navigation bars on your website. These pages can be 'hidden' by un-selecting the **Display in Nav** check box in the Page Details of each specific page. Note that this is separate from a security option. A user with proper security permissions can still navigate to these pages by redirects, saved links, or other means but if they do not have the proper security permissions for the pages, they are unable to access them by any means.

Inherited Attributes

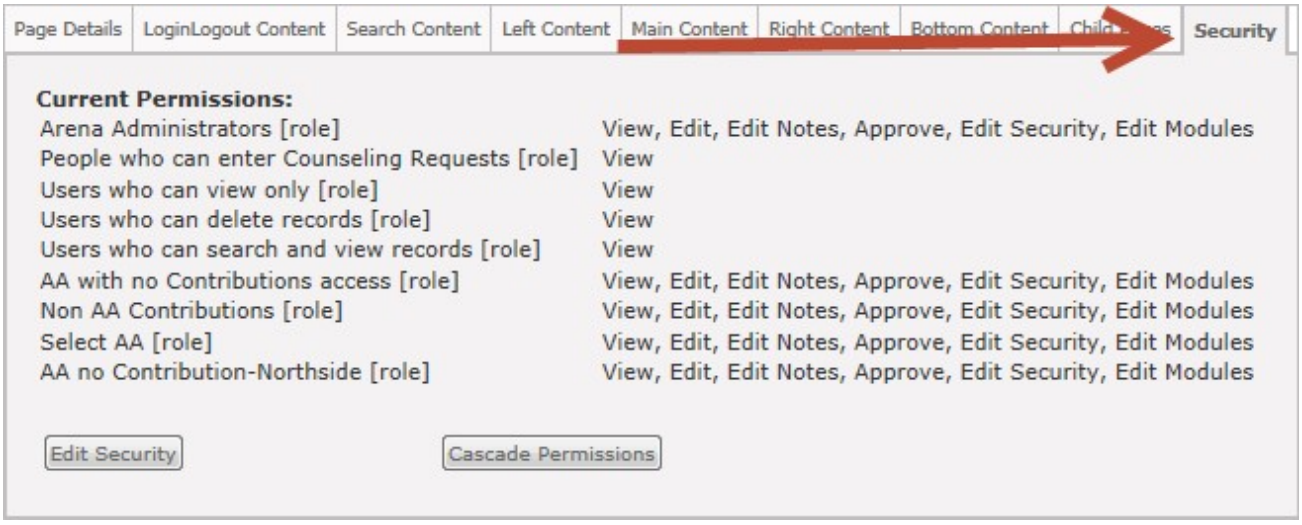
When a page is created, it automatically inherits the security settings and modules of its parent page. This can be used when initially creating your web site for items that are on every page, such as an All Users (View) permission or the navigation control. When adding a page, remember that it inherits every module on the parent page in each tab, as well as the security permissions of the parent page. Also, note that this inheritance only occurs when the page is initially created, and that any modules or security settings added to a page do not automatically propagate down to any child pages.

Importing/Exporting Pages

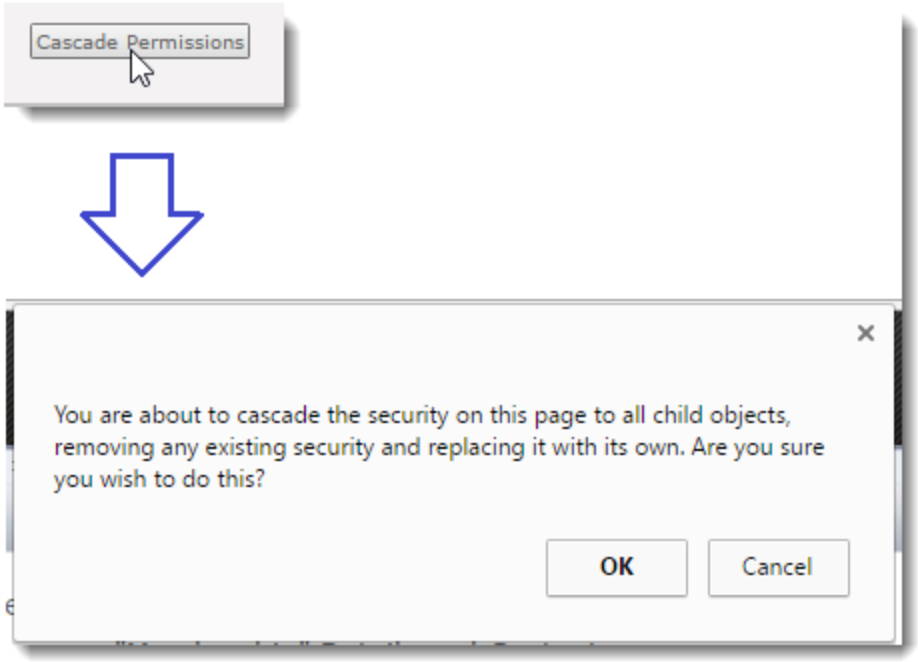
Arena allows you to import and export pages and their child pages, including any modules that exist on those pages. This can be used to move pages from one portal to another or even from one installation of Arena to another. These export files retain the modules on the exported page and any child pages, the tree structure of the exported page and its child pages, and any page references (such as module settings) that are internal to the tree that is being imported.

Page Security Tab

The **Security** tab for each page works just like Page Security in Security Roles, except the **Security** tab sets permissions only for the current page. Click the **Cascade Permissions** button to apply security to all child pages if the current page has child pages. Keep in mind this is page security not module security.



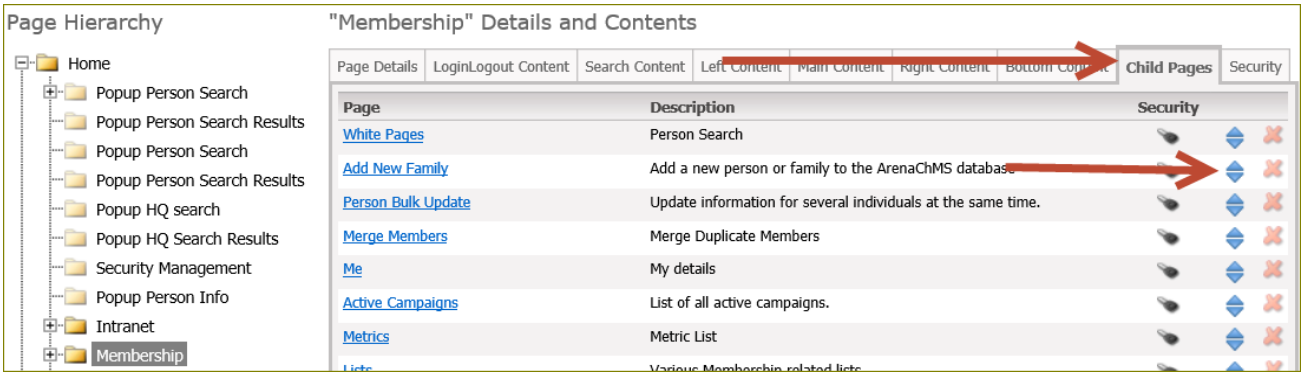
NOTE: When selecting the Cascade Permissions button, you are prompted to replace the existing security for child pages.



Child Pages

After selecting a page, select the **Child Pages** tab to display any child pages for the current page.

Click and hold the **Reorder** icon to change the order of the child pages. This change is for all users with access to said pages.



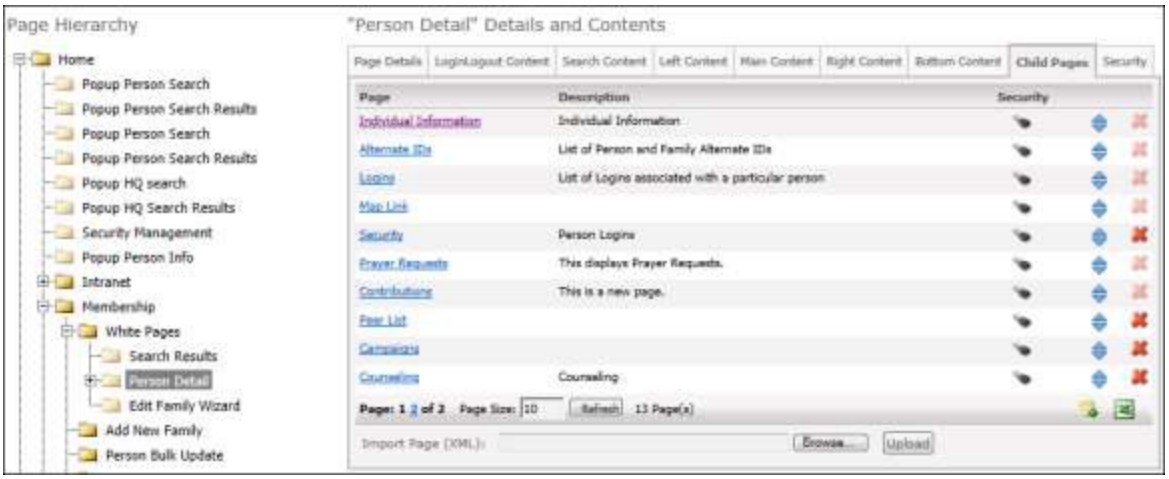
Arena clients can add new pages to further customize Arena for your organization. Before adding a new page with new information or a specific module, you need to decide where in your Page Hierarchy you want to add the new page.

It is also important to know whenever you add a child page; the new page automatically inherits the template, page settings, modules, and security settings from parent page. Inheritance is only at the point of creation, meaning that if you add a module to a page that has child pages, the existing child pages do not inherit the new module. In this scenario, you can add each module manually to each child page. However, if you later add a child page, it inherits the module(s) from the parent page. Therefore, if you need to add new pages, the recommendation is to set the modules on the first page before adding other pages.

Add a New Child Page

1. Click the page where you want to add a child page. This will be the Parent Page to the new child page.

2. Click the **Child Pages** tab.



3. If this is the first child page, click the ***Add*** link, or click the **Add New Page** icon if pages already exist. This automatically opens the **Page Details** tab of the new page.

4. Enter a **Page Name** and if applicable **Menu Name** for the new page.

5. Click the **Update** button. If there are multiple pages, click and hold the **Reorder** icon to move the page to the desired order.

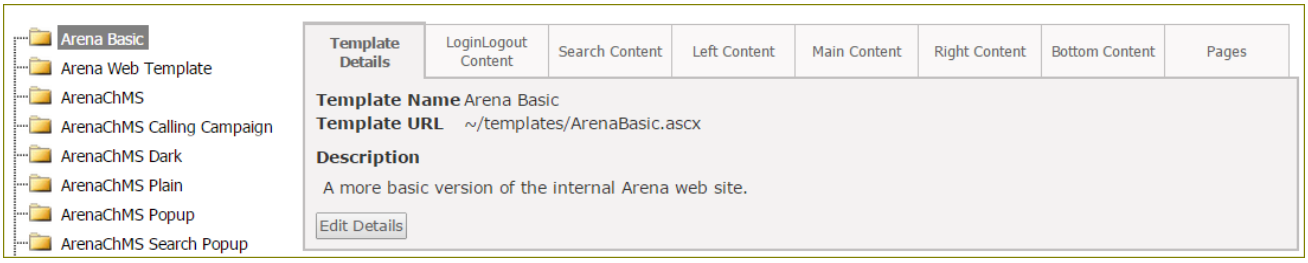
You are now ready to change/add modules to the page.

Templates

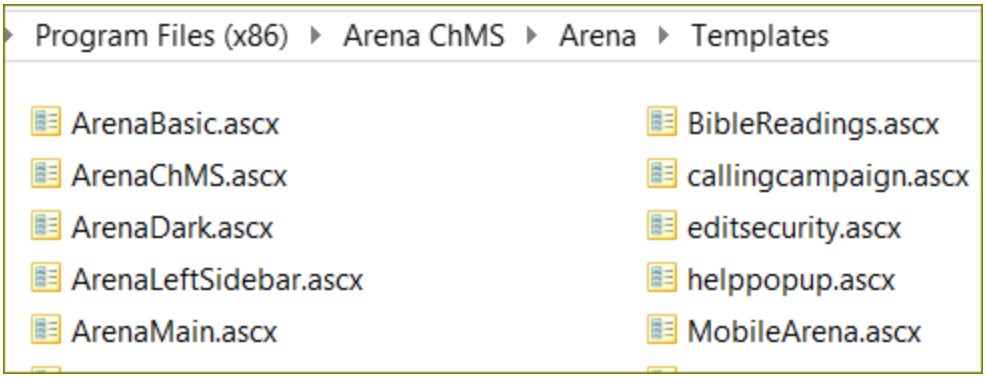
Templates are the framework that defines the appearance and layout of Arena sites. Templates are in HTML inside of an ASP.NET page and allow a huge amount of versatility both in their own content and design and in the design of your website. The HTML format of templates is coded in C# and is saved as an ASP module file (.ascx).

While the majority of your website uses the same template file, you may encounter a few pages where you want to use a different template, such as the home page on the Arena-managed external website. Arena includes default templates used throughout the application with available alternate templates.

From the **Administration** menu, click the **Templates** option located under the WEBSITE heading to view a list of all available templates. Click a template and the **Pages** tab to display all pages that use the selected template. If no pages display, the template is not currently in use. (You must have all templates listed on this page in order to apply them to an Arena page.)

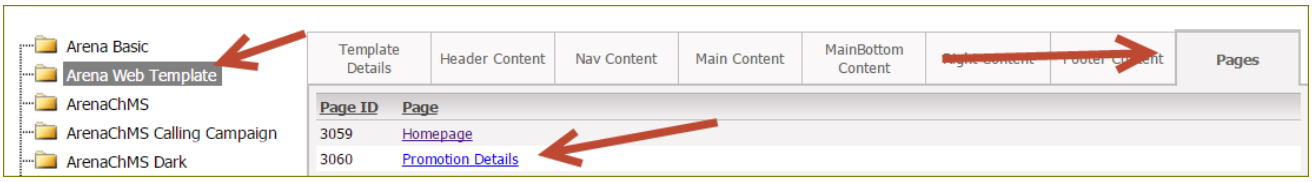


The template files are located in the ~ArenaChMS/Arena/Templates folder on the web server. There are several additional templates available in this folder. To apply a template to a page, you first need to add the template to the Arena/Templates page.



While you can create a new template from scratch, you can also edit an existing template or copy an existing template and edit the copy. If you do elect to create a new template, consider consulting with a web developer to do so. However, it is very easy to simply copy and modify one of the default templates included with Arena. (While a great deal of a template's structure is made from HTML tags, the key elements of the template are the ASP.NET tags. These ASP.NET tags are defined in the .CS code behind files provided with the Developer license.)

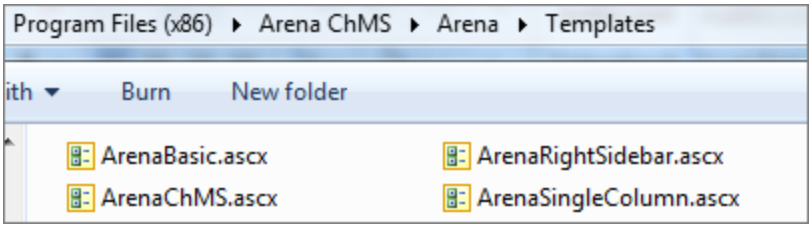
If you elect to edit an existing template, it is recommended to first click the **Pages** tab of the template to review all pages that use the template. Any changes made to the template applies to all of the pages.



Add a New Template

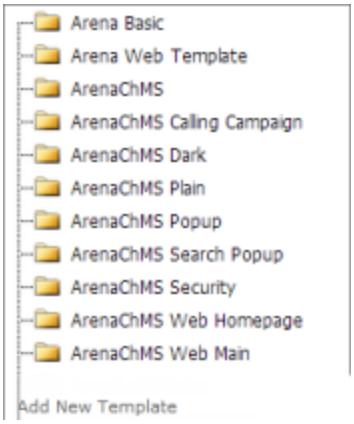
1. Go to the ArenaChMS folder on the Web Server.

2. Add the new template file to the ArenaChMS/Arena/Templates folder.

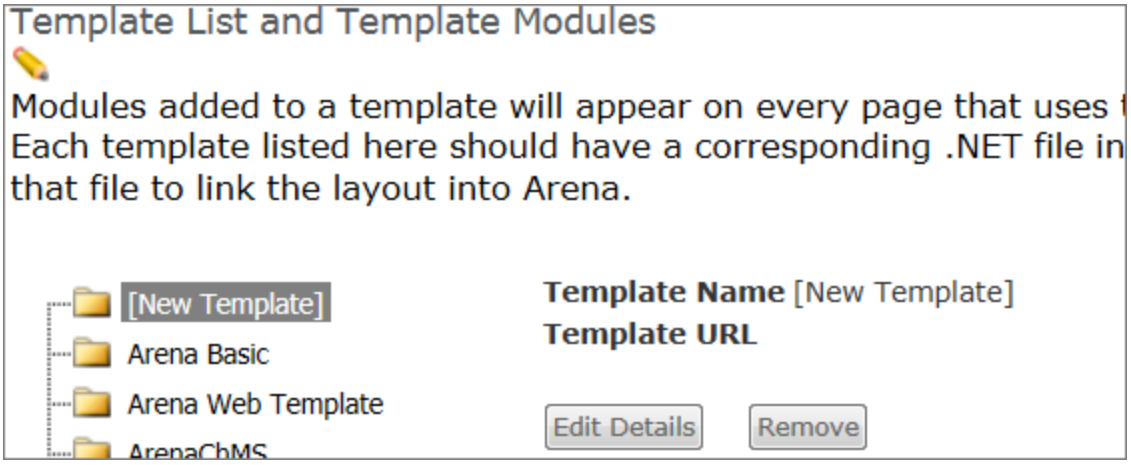


3. From the **Administration** menu, click the **Templates** option located under the WEBSITE heading.

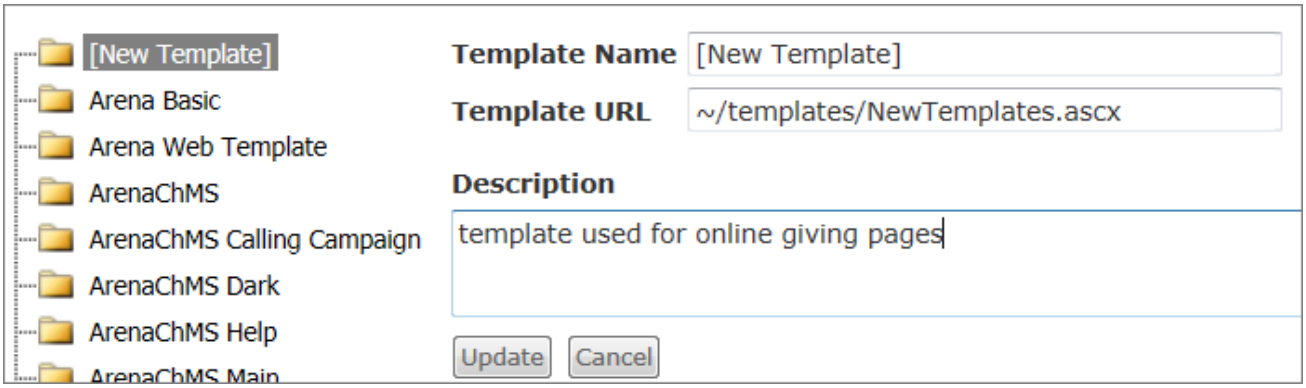
4. Click the ***Add New Template*** link. Arena creates a placeholder needed to map to the new template file.



5. Click the **Edit Details** button for the new template.



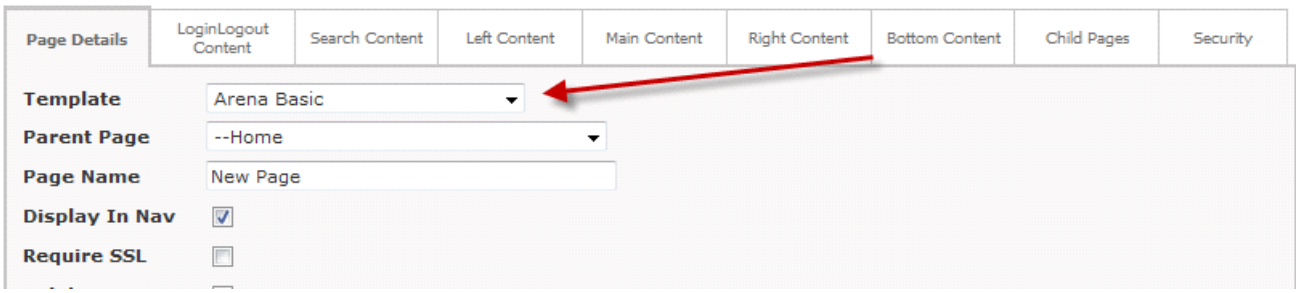
6. Enter a Template Name, the URL path for this template and a Description for this template. (The URL path is the specific location of the ascx file.)



7. Click the **Update** button. You can now add modules to the content areas of the template itself or apply the template to an existing page.

Change a Template

1. Go to the desired page.
2. Click the ***Edit Details*** link on the **Page Details** tab.
3. Select the desired template from the **Template** drop-down.



4. Click the **Update** button. Often when you change a template, modules are misplaced. If this occurs, Arena adds a new tab with the misplaced modules. You need to resolve the misplaced modules before proceeding.

Modules

As you navigate around the Arena application, you see many different ways in which you can interact with the data in your Arena database, each appearing as its own separate piece. These

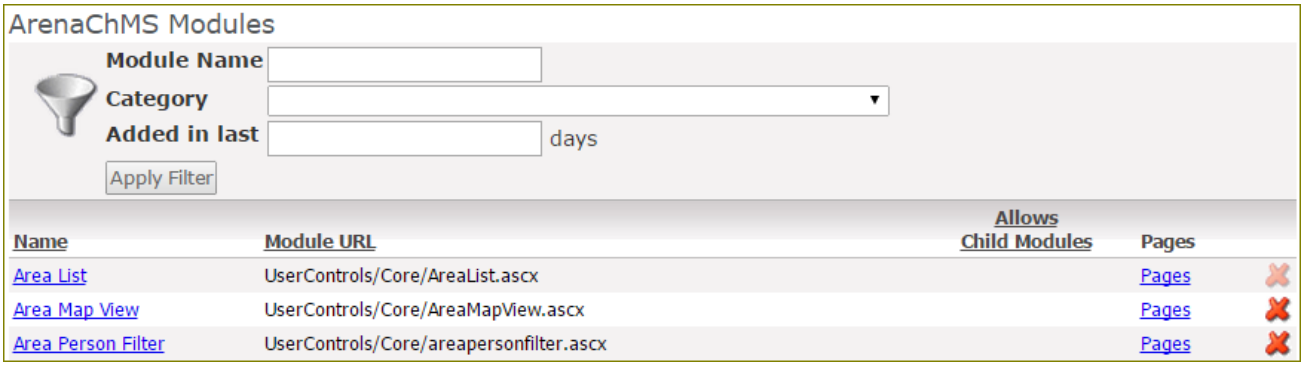
separate pieces of the Arena application are called Modules. Modules are small applications or 'applets' which can be stand-alone or operate in tandem with other modules. These applets deal with a specific function of the Arena application in a highly specialized method, allowing them to be very small and very efficient. This also allows you to place a portion of the application virtually anywhere, from adding forms to various internal pages to displaying information from your database on an external site. The **Module** page displays all available modules.

There are several hundred modules already in use with several more available for use. These modules can serve utilitarian functions such as the **Page Dropdown** menu module for navigation or the Login Logout module for secured sections of your web site. They can also be static modules for displaying information such as an Advance HTML Text module used to display a Flash animation file or an image. Some optional modules can even be interactive, such as a Poll Display Active in Category module to gain information from visitors to your website. In addition to customizing modules to fit the needs of your organization, you are encouraged to explore the available modules and place them as needed throughout your website.

Two of the most underestimated modules in Arena, and worthy of special mention are the Advanced HTML Text and Report Grid From Query (commonly referred to as RGFQ) module. The Advanced HTML module can be used for nearly any type of HTML code, from formatted tables to Flash animation files to image maps, and still be edited as easily as any text file. For example, you could create an image from a map of your city and the surrounding area, place it in the Advanced HTML Text module, then create an image map linking to pages for your small group areas so that a visitor can select a small group near their home or work. Just about anywhere where you might think you need to write an element into your template, such as a link, some header text, or a Flash animation, you can instead use an Advanced HTML module so that you can later edit the element without needing to modify your template. The RGFQ module can be effectively used to display SQL query data. This module can display the results of a query that is less than 2,000 characters in length or run a custom stored procedure.

Each module has specific functions and may or may not contain module settings. Some module settings are required and some are optional. While Arena already has the needed modules in place for most features, you want to review the module setting of the modules that are used for the features your organization uses.

All available modules display on the **Administration** menu **Modules** option. The **Disabled Delete** icon indicates the module is applied to at least one page. The **Delete** icon indicates the module is not applied to any page.



Use the Module Name, Category and Added in last <#> days filters to display specific modules. You can enter any part of the module name.

- **Name** – This column displays the name of the module. Click the ***Name*** link to view module details.
- **Module URL** – This column displays the file path of the ascx file stored in the ~ArenaChMS/Arena/UserControls folder.
- **Allows Child Modules** – A **Check Mark** icon in this column indicates this module can contain child modules.

The **Pages** column displays a link that displays the pages where this module is currently applied.

The last column displays either a **Disabled Delete** icon that indicates the module is applied to at least one page or a **Delete** icon that indicates the module is not currently in use on any page.

At the bottom of this page, you can import or export modules.

Use Import Modules to browse and select modules to upload.

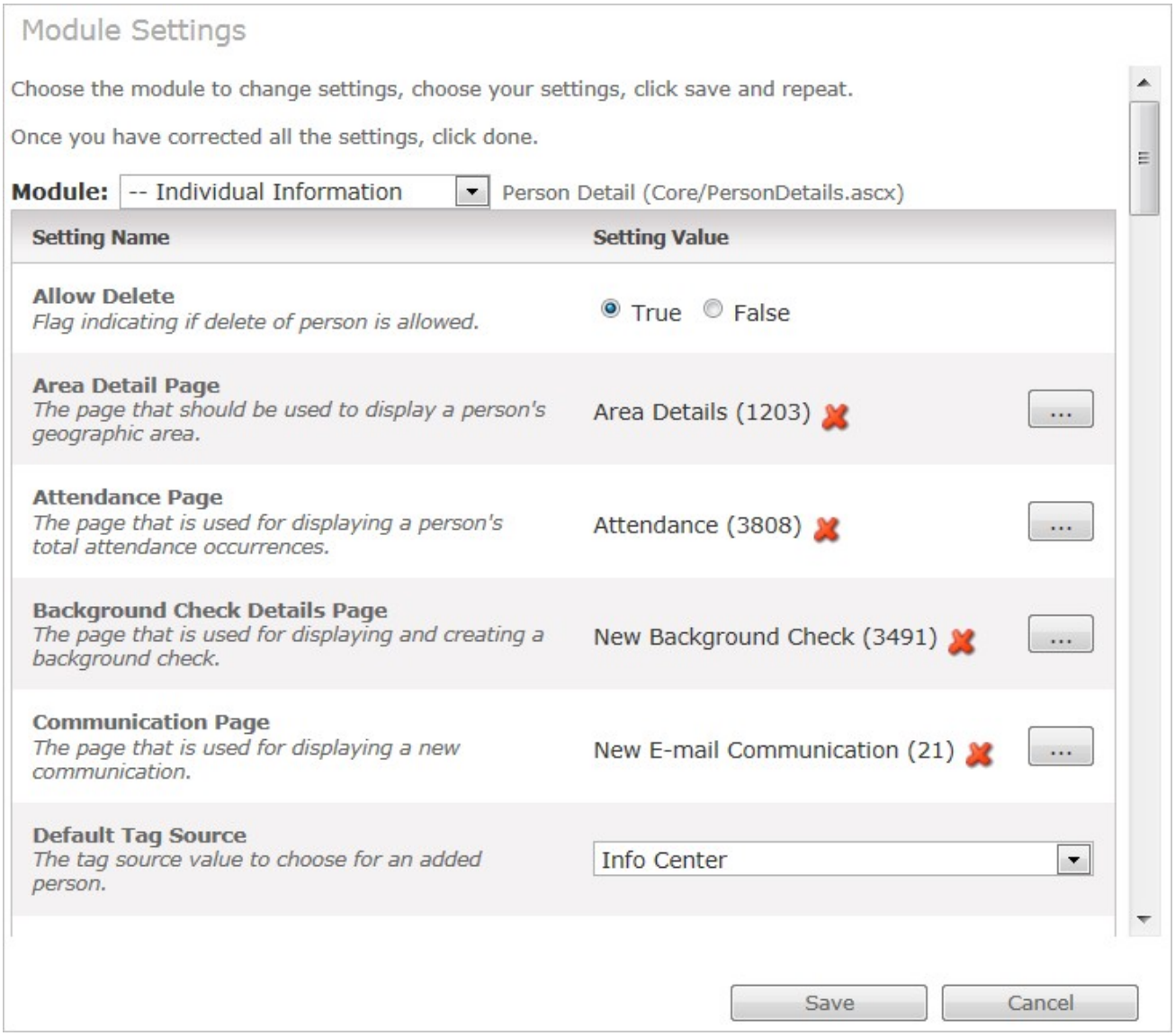
Click the ***Export Modules*** link to display a pop-up to select module to export, creating an XML file that contains the contents of the .ascx file and the module reference for the database.

Module Settings

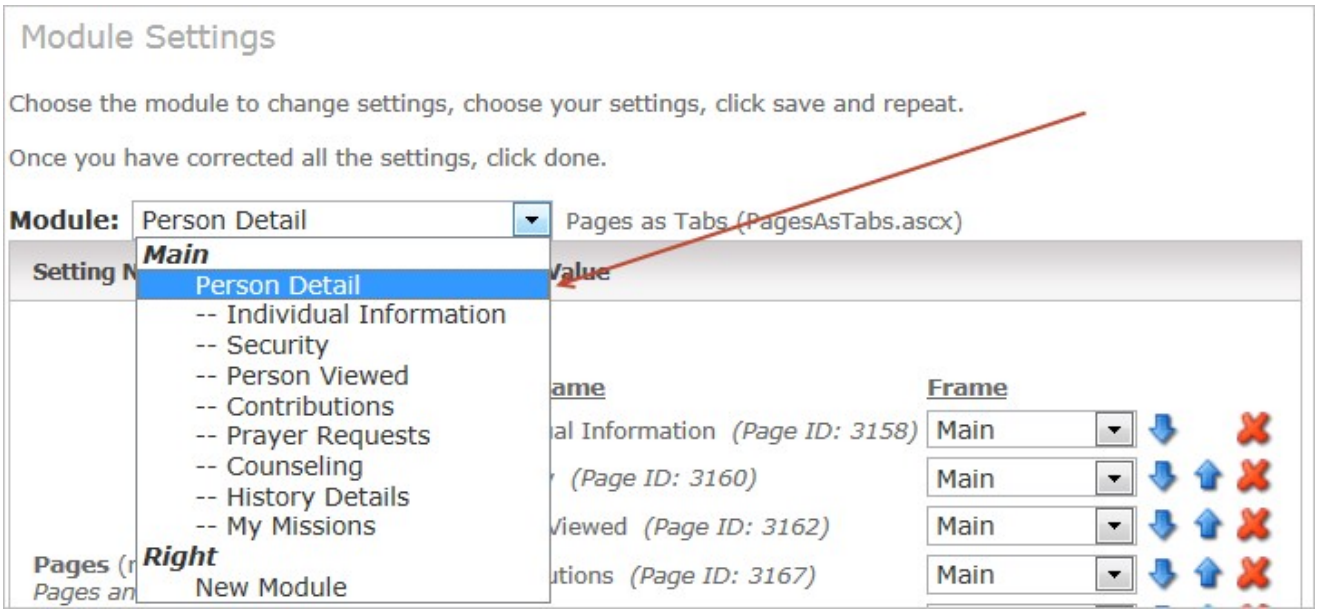
Most modules have settings. Some settings are optional, while others are required which are indicated with "(required)" for the setting. You must update the required settings in order to save the module settings. If you attempt to update, a message displays with an * asterisk next to the required field.

In most cases, you can access applied modules on the **Main Content** tab of the specific page.

Click the ***Module Title*** link to display module settings. If you make module setting changes, click the **Save** button and on the **Administration** menu, click the **Refresh Cache** option to apply the changes.

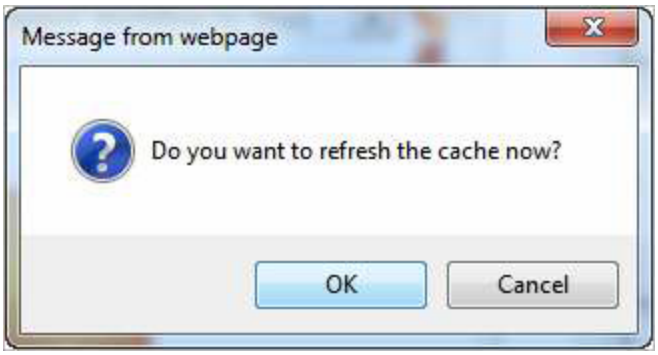


You can optionally click the ***Edit Settings*** link in the top right corner on most pages to directly access module settings. If more than one module is on the page, use the Module drop-down to select the desired module.



When you make adjustments using the ***Edit Settings*** link, click the **Save** button then the **Done** button.

Arena displays a refresh cache window. Click the **OK** button to apply changes.



Add a Module to a Page

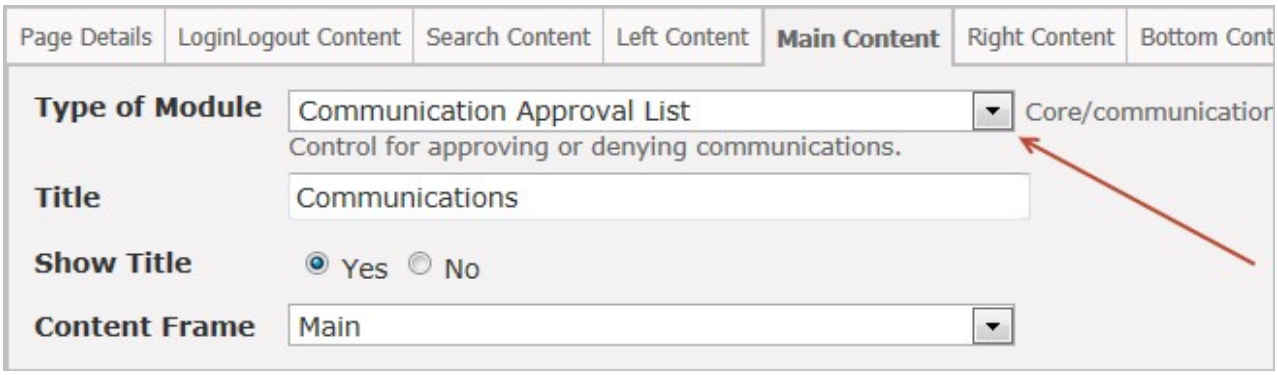
Click on the desired page. Expand the page tree as needed to access the desired page. The screen refreshes and displays the **Page Details**. This also displays the tabs that represent the content areas that define the page layout.

1. Click the desired content tab. Most modules are on the **Main Content** tab.

2. Click the **Add New Module** icon. By default, the new module name is **New Module** and the type is "Advance HTML Text" that functions as a default placeholder.

3. Click the ***New Module*** link.

4. From the **Type of Module** drop-down list, select the desired module.



Based upon the selected module, make required and desired changes. Many modules have required settings, and you cannot update the module until you enter or select all required fields. If you click the **Update** button without selecting a required setting, a message displays indicating that a field is missing, and an * asterisk displays next to the field.

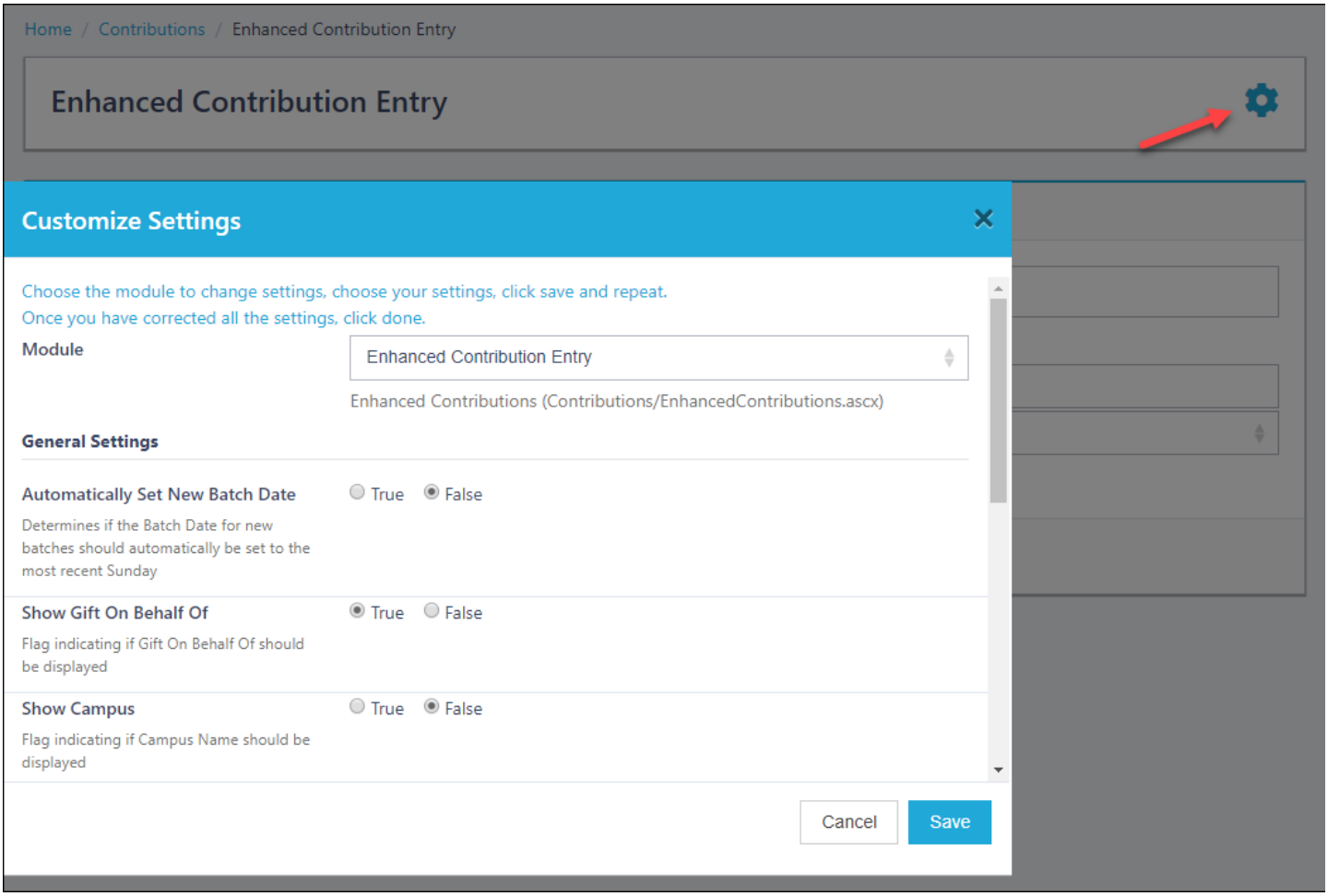
5. Click the **Update** button.

Adjust security permissions for the module, if needed. Keep in mind, the new module inherits permissions. You can also set permissions through Security Roles.

If multiple modules exist, click and hold the **Reorder** icon to change the order of the modules.

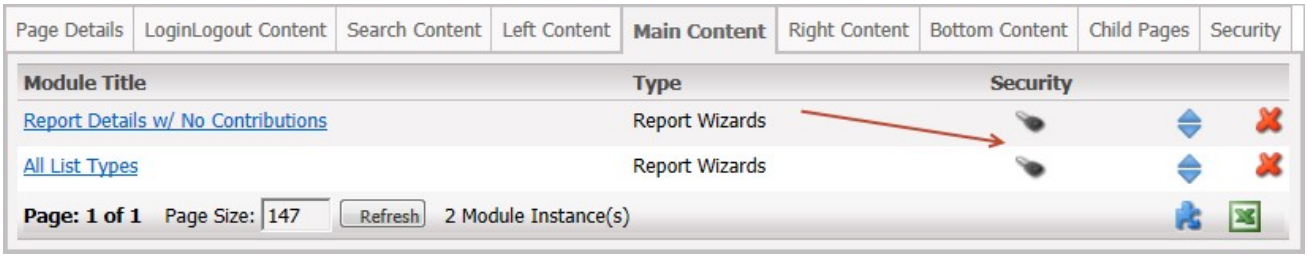
Person Specific Module Settings

A gear icon displays in the Page Header whenever person specific module settings are available. This allows users to manage their settings for certain modules. The following is an example from Enhanced Contribution Entry. The setting available vary based on the module.



Module Security

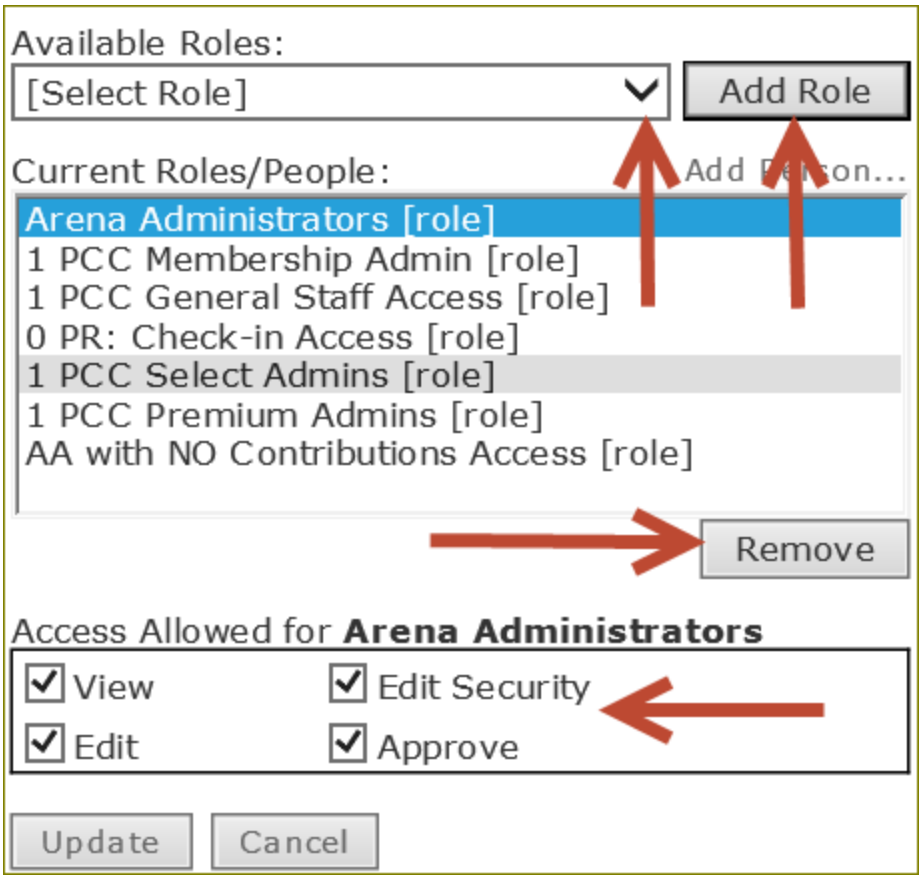
Module security is similar to working with permissions in Security Roles. Click the **Security** icon to the right of the module to make module security adjustments. This is especially valuable when applying the same module to the same page in order for the module to work one way for a defined set of users and yet another way for a different set of users. In this case, you can add the same module but change the module settings for each application. Then you want to set security for the different modules.



Edit Module Security

As you customize Arena for your organization, in cases where you apply the same module to the same page, you want to be sure the same security role(s) are not applied to both module instances to avoid both modules displaying for the user(s).

1. Select the **Security Key** for the module you want to change security permission.



2. Select the security roles from the **Available Roles** drop-down list you want to add or select the security role for the Current Roles/People window you want to remove from this module. You can optionally add individual users by selecting the ***Add Person*** link.

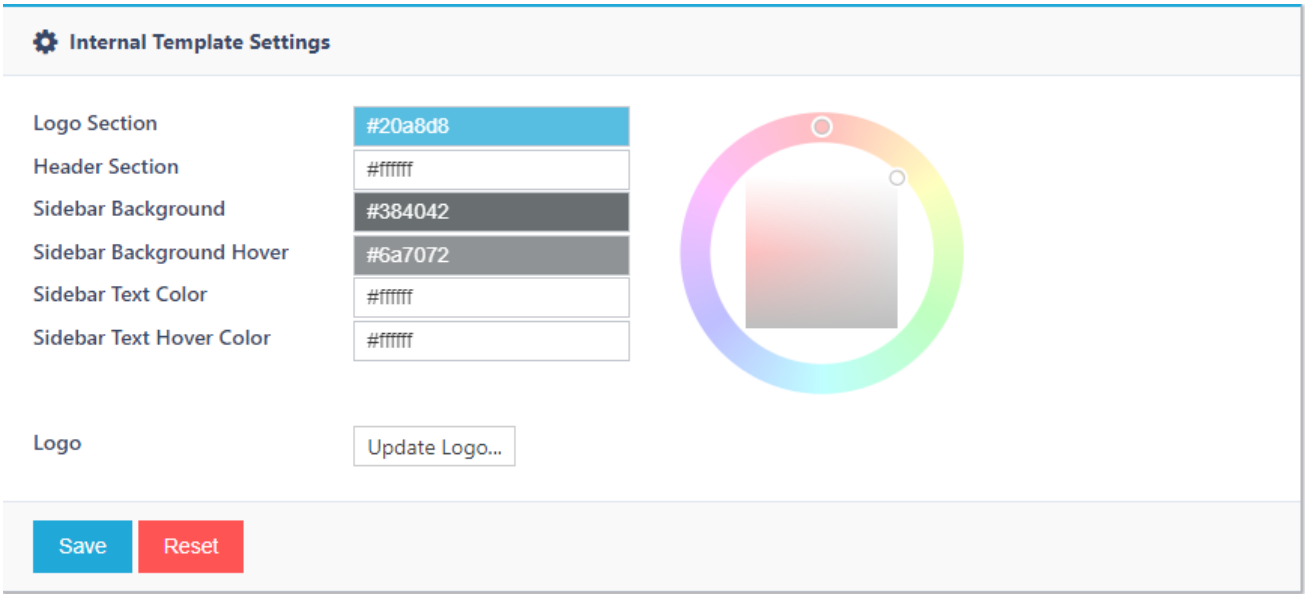
3. Click the **Add Role** button to add the selected security role or the **Remove** button to remove the security role.

4. Make desired security permission selections in the **Access Allowed for** section.

Arena V2 Settings

Define your internal template settings to customize the look of the interface.

1. From the **Administration** > **Website** menu, select **Arena V2 Settings**.



2. Change the various color selections by dragging the color selector to the desired color or type the desired hex code for each setting.

3. Click **Update Logo** and then click **Choose File** to select your logo image.

4.Click **Save** when done.

NOTE: Click **Reset** to use the default settings.

Security

Security is applicable to Arena portals, pages, modules and person attributes. Before you customize security let's look at some settings:

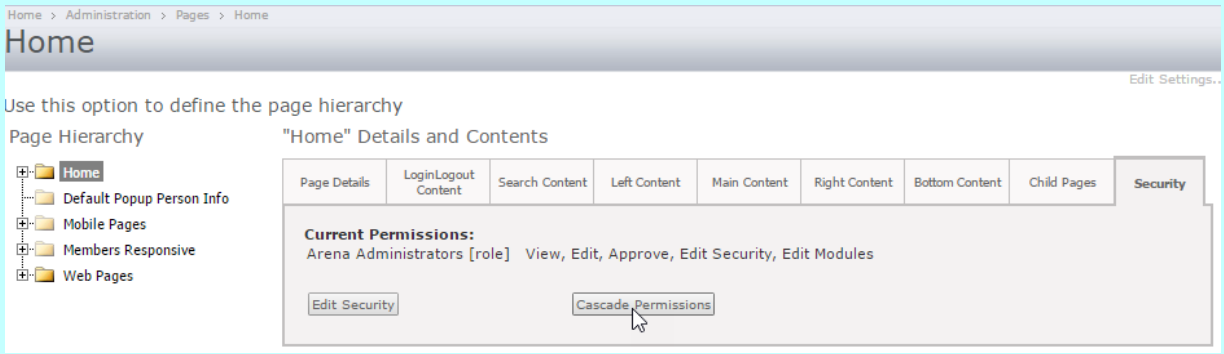
Portal Security – Each portal can be setup to use either Forms (Database) Authentication or Active Directory authentication. There are aspects to consider with either option especially if the goal is to enable staff to access the Arena (Staff) portal when off campus. In order to do so, Forms authentication is required. In addition to reviewing the available options with your Arena Administration team and senior staff, it may be beneficial to research Forums on http://community.shelbysystems.com/arena/f to see how other organizations have approached each option.

If you are just starting with Arena, the first step is to assess which features your organization will initially use and focus setting security for said features. Some features provide a variety of customization options while others do not. In addition to customizing each feature, you also want to review and apply security.

User Security - As you begin to evaluate security, you need to decide which users perform specific tasks such as adding, merging, editing and deleting records, adding tags, etc. It is common practice to build security roles based on function/department, not individual staff members. While individual security may be needed for specific features, using security roles and security templates allows for a systematic approach for managing access for all staff and all non-staff.

Cascading Permissions

When setting permissions on an object, there is an option for Cascading Permissions which allows you to cascade the security roles and templates to all child objects. The following image is an example of changing the Home page security permissions.



Before beginning the process of building out security, it is recommended to first identify all staff and non-staff who need access, the features each staff member needs to access and the permission level to each feature. Arena has the option to set view, edit and approval for many features. Along the same lines as identify which feature each staff and non-staff member can access, you also

want to determine the permission level for each individual.

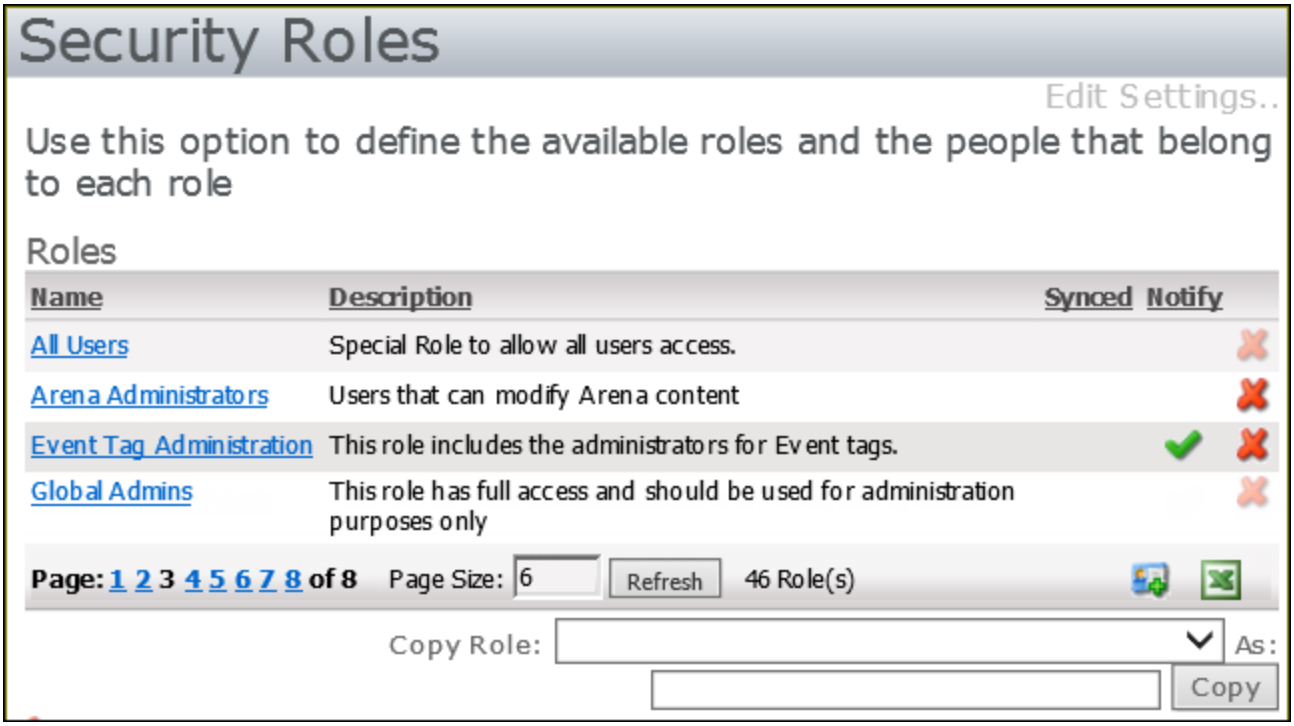
In addition to determining staff and non-staff who need access to Arena, you want to determine necessary page(s) and module(s) to grant access. While most security is set at the Security Role level, some permissions are at the module level.

Security Roles

Security Roles is where you can create user groups and set permissions for each user group. You can apply permissions to portals, pages, modules and fields. A user cannot view anything unless the Arena Administrator grants permission to do so by either security role permission or individual permission. Security roles are cumulative, meaning if you add a user to multiple Security Roles, the permissions stack. Therefore, the user have access to all portals, pages, modules, sections and fields that each separate role allows.

Arena has four core security roles with permissions set. The remaining security roles are a starting point for you to customize. Use the remaining security roles to customize for your organization. (No permissions are set for these security roles but they do have access to default web portal templates.)

- **All Users** – This role applies to all accessible pages for each portal users can view in front of any login page such as the home page for each portal. In general, use this role for pages you want users to view in front of the login page. You cannot delete this role. As you apply custom security for you organization, you will likely remove the All Users role from selected pages so be sure to verify if this role is also on the page that you might be trying to limit access.
- **Arena Administrators** – Users in this role can view and modify all content for all portals. You can modify permissions for this role.
- **Global Administrators** - Users in this role can view and modify all content for all portals. You cannot delete this role or modify permissions. From a day-to-day basis, Arena Administrators should not be in this role. On the occasion when Global access is required, you can either add an Arena Administrator record temporarily to this role or create a Global login separate from the Arena Administrator login.
- **Registered Users** – This role applies to any authenticated user on the external portals. Any user who is successfully logged in (been authenticated) automatically has the permissions defined by this role. You cannot delete this role.



Before we walk through the steps to create and apply security roles, let's review the overall options. While it is logical to create security roles by person or department, you might consider creating security roles by function. For example, you could create a general security role for all staff where they can view common features like searching and viewing records, view tags and groups, sending email and viewing lists. You can then create another security role for more advanced staff who should be able to add or edit records, edit or add tags and groups, and create lists.

Before we cover the detail steps to customize a security role, the basic steps are as follows:

- Customize a Security Role.
- Set Permissions for the security role.
- Add existing records to the Security Role.*
- Set login and password for each user or sync with an Active Directory Group.*
- Set template permissions, if needed. This step is applicable for new security roles.
- Test.

*Arena has other options to add records to security roles, logins and passwords. We cover these after covering the basic steps.

Customize a Security Role

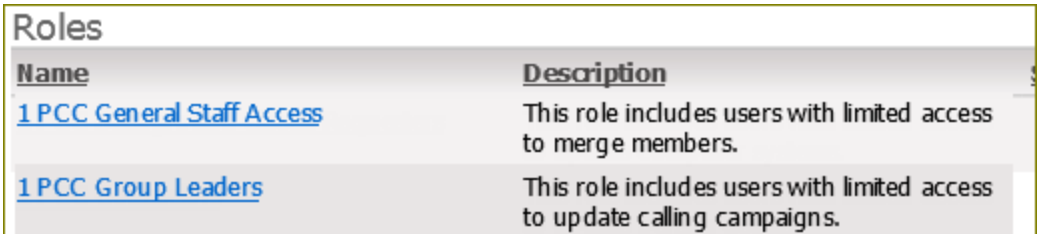
1. From the **Administration** menu, click the **Security Roles** option located under the SECURITY

heading.

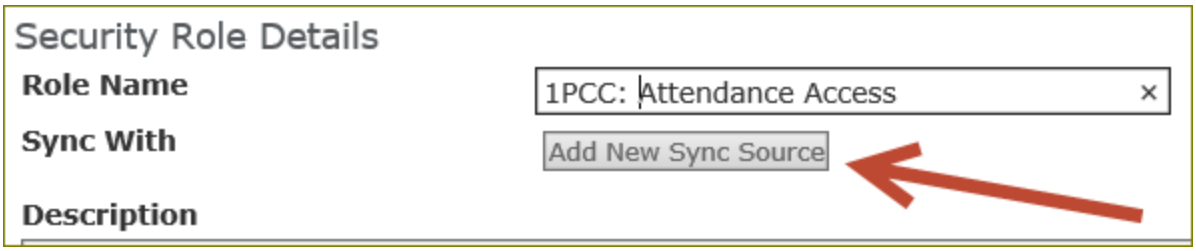
2. Click the **Security Role** you want to edit. All but the previously mentioned Security Roles are placeholders for you to customize. They have no permissions set.

3. Click the **Edit Details** button.

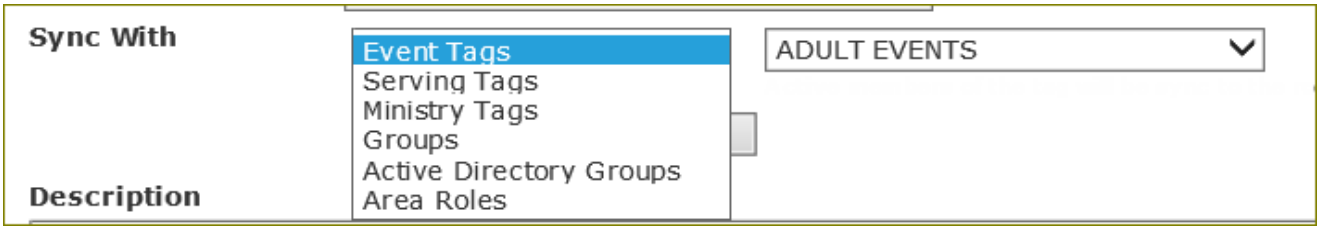
4. Customize the **Role Name**. You might consider adding a unique preface to the security roles you customize to distinguish ones you have customized from the 'placeholder' security roles. For example if the name of your organization is Passage Community Church, you can add PCC in front of all security roles you customize in order to easily identify the ones that have been customized and applied. You might also consider adding a numerical value in the front of the PCC so that these security roles are listed in the first position. Security roles are listed in numeric/alpha order.



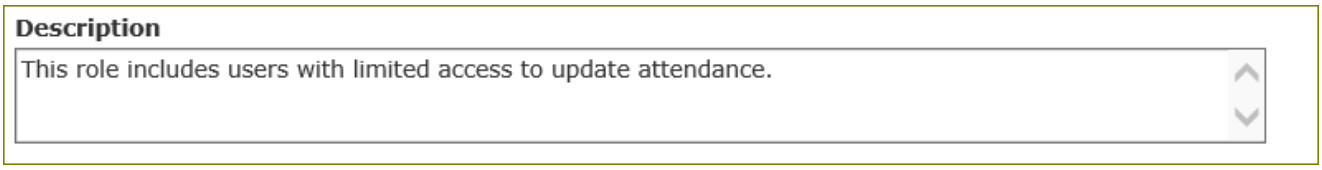
5. Click the **Add New Sync Source** button, if you plan to sync the security role with another object. Using this option, the ONLY method to add records to the role is to add the record(s) to **Assignment Type Worker** tab, **Tag**, **Group**, **Active Directory Group** or **Group Area Role.**



6. This option synchronizes the security role with the selected Assignment Type Workers, Event Tag, Serving Tag, Ministry Tag, Group, Active Directory Group or Area Role. To use this option, start the Sync Role Agent and Arena generates a login (e.g., ASample or ASample2 if this login already exists) and uses an initial password. (Arena sends emails if the user has an active email address on their record. If the record does not have an email address, Arena sends the email once the email address is added to the record.) The user is prompted to change the password at initial login. You also want to check the **Notify New Members** check box and customize the email for new users. If your organization wants to use logins other than first initial and last name, manually create the logins on the individual records under the **Security** tab.



7. Enter a Description for this security role.

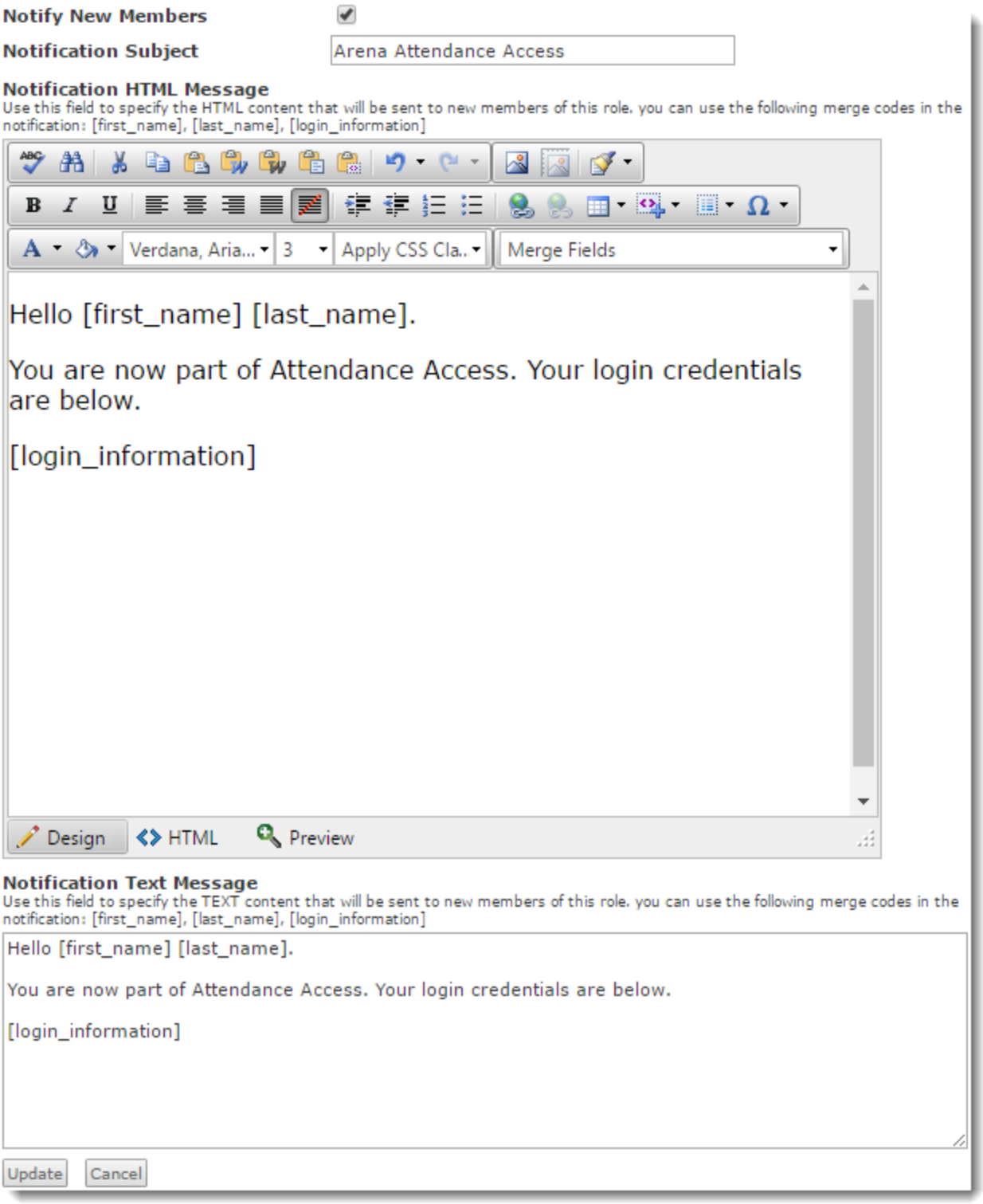


8. Select the **Notify New Members** check box if you want Arena to send an email to users when added to the role or sync source. This assumes all users have a valid email address on their record.

9. Enter a **Notification Subject** for the email.

10. Enter **Notification HTML Message** to include in the email. Use the merge fields to include login information in the email. You can also add HTML code in this message box.

11. Enter **Notification Text Message** to include in the email for plain text recipients. All merge fields work for this email format.



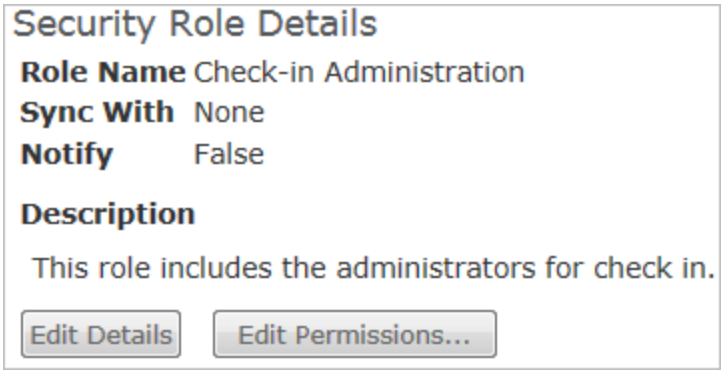
12. Click the **Update** button.

Set Permissions for a Role

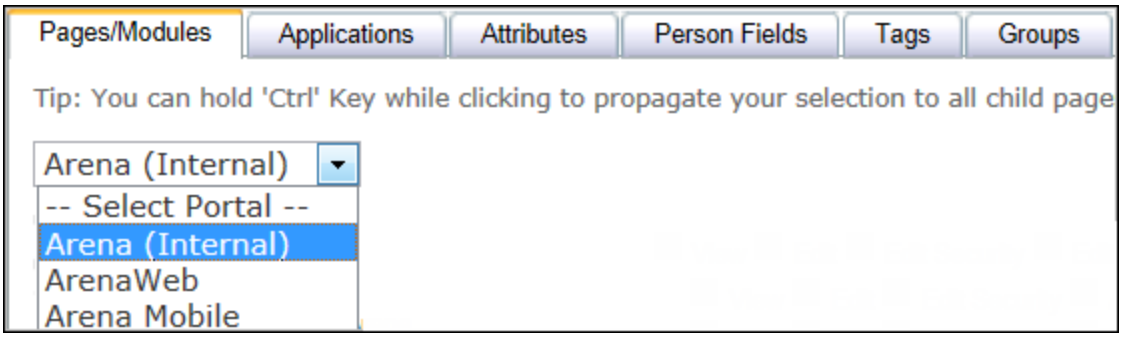
You can set permissions for all tabs before clicking update or you can update as you set

permissions to avoid any timeout settings for inactivity.

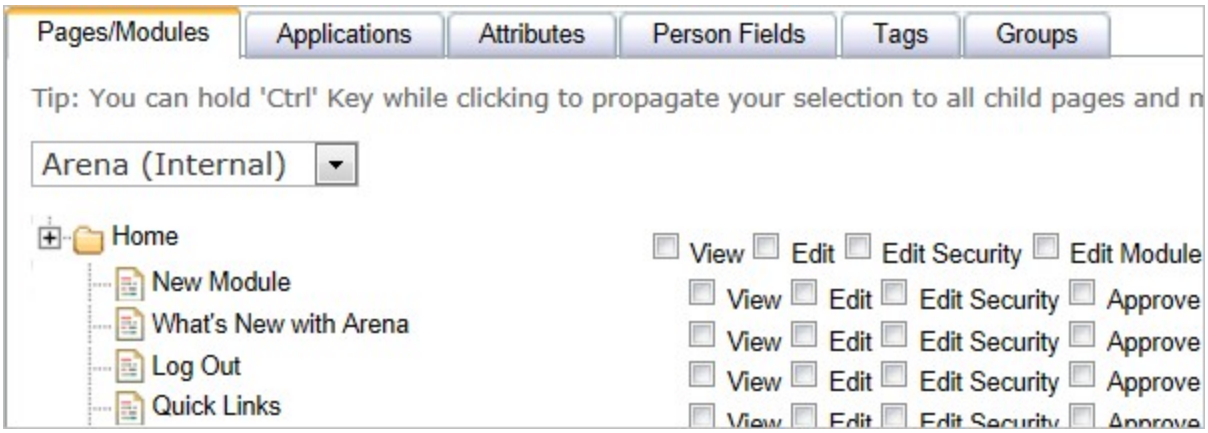
1. Click the **Edit Permissions** button for the security role.



2. From the portal drop-down list, select the portal you want to apply permissions. You can set permissions for multiple portals in one security role. For example, if you want to set general staff access for the Arena (staff) portal, Arena Web (member) portal, and Arena Mobile (smart phone) portal, you can do this in one security role. We use the Arena (Internal) portal for this example.

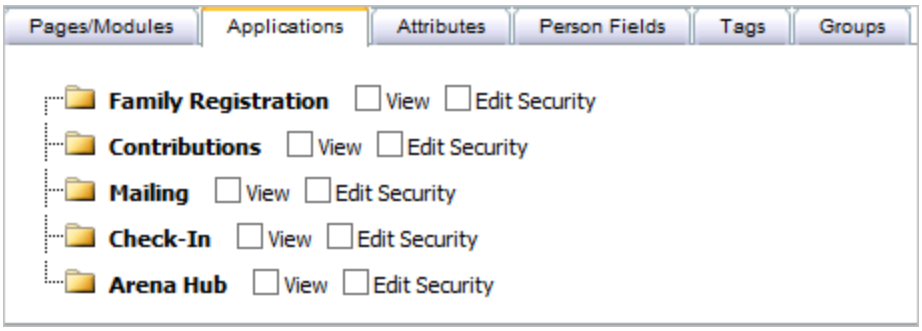


3. Set permissions on the **Pages/Modules** tab. On this tab, you can set permissions for the **Page** and for the **Modules** applied to the page. As you think about user access, consider each page they need access and the module on each specific page. In order for a user to 'use' the module, they need **Edit** permission for the module.



- **View** – Users with **View** permission can view the page or module. It is important to remember that while a security role or individual may have **View** permission to a module, if they do not also have **View** permission to the page they will not have permission to view or use the module.
- **Edit** – Users with View and Edit permission can edit the page or the module. In cases where users need to use the module, select **Edit**. Setting **Edit** on a page allows users the permission to edit the page that is typically limited to Arena Administrators.
- **Edit Security** – Users with Edit security permission can edit security for the page or module.
- **Edit Modules** – Users with Edit module permission can edit module settings directly from the page. Module setting changes are global for all users and are typically restricted to Arena Administrators.
- **Approve** – Users with Approve permission can approve the object such as communications, promotions, events, registrations, merging records, etc. Approval is available for features such as communication, event and promotion approval. Users in a security role where Approve is selected bypass the approval step.

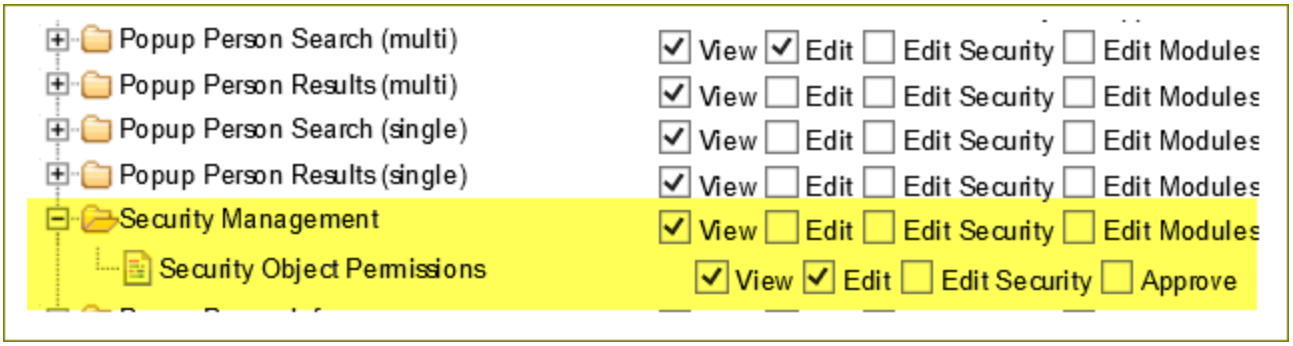
4. Select the **Applications** tab to set permissions for the Family Registration (Self-hosted only), Contributions, Mailing, Remittance Mailing and Check-In click-once applications and Arena Hub. You can also set security for these applications on the **Application Security** page.



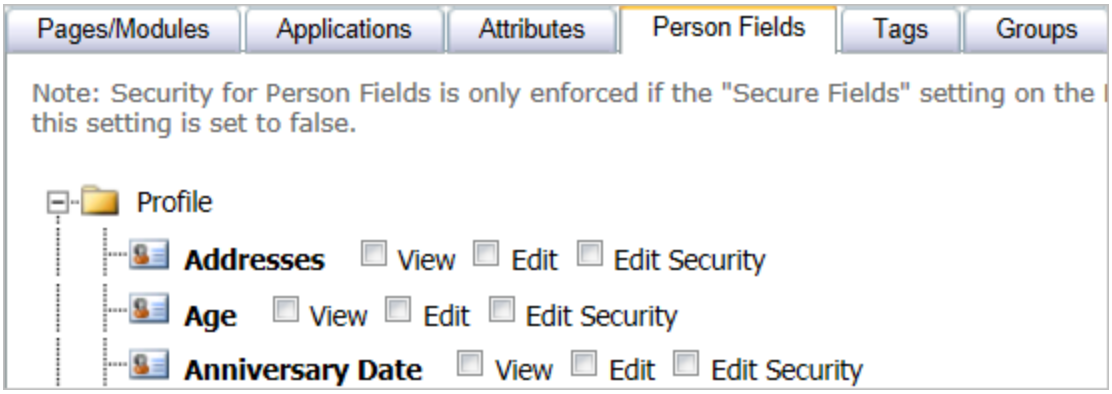
5. Click the **Attributes** tab to set permission for Person Attributes that are available on the **Individual Information** tab of the **Person Detail** page for all records. As you set permission for these fields, keep in mind that in order for users to be able to edit a field in the 'section' they also need **Edit** permission for the section. Press the "Ctrl" key to propagate security for the page or section.

In addition to individual permission, you also need to consider setting permission for **Security**

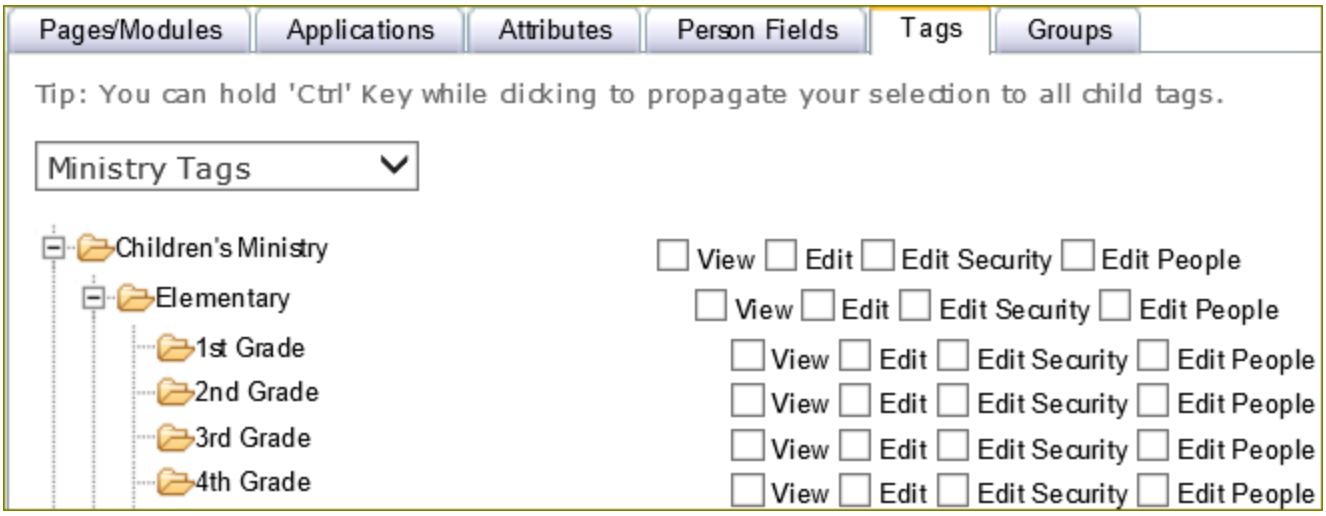
Management page and module. Keep in mind, users only have permission for the fields you give permission.



6. Click the **Person Fields** tab to set permission for individual fields on the **Individual Information** tab on the **Person Detail** page.



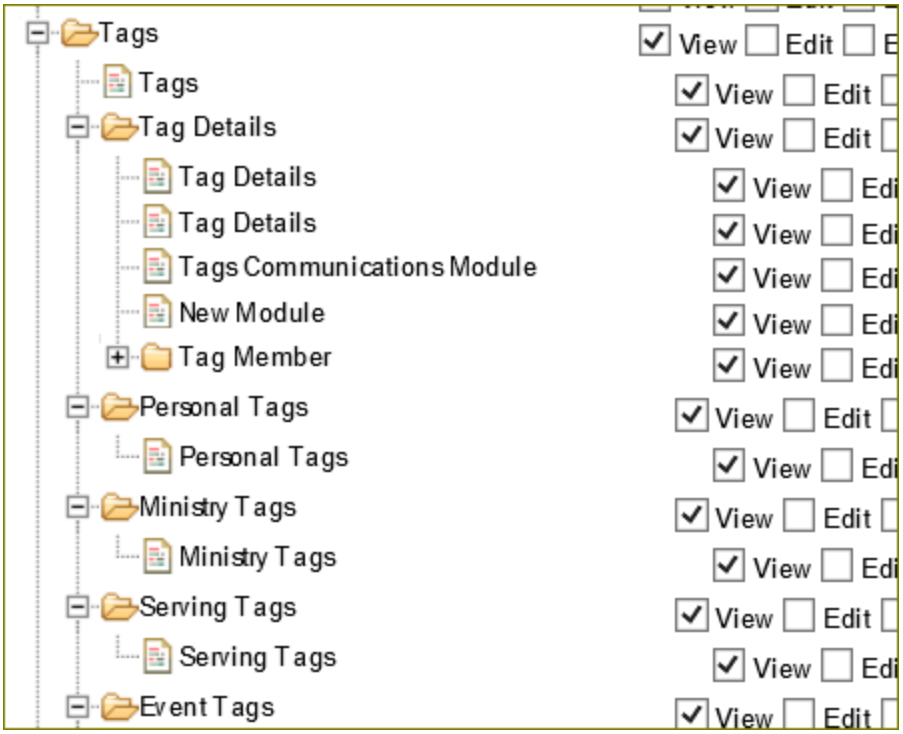
7. Click the **Tags** tab and then the Tag Type to set permission for specific tags. If you want users to only add/remove people to/from that tag, they only need **View** and **Edit** people permission.



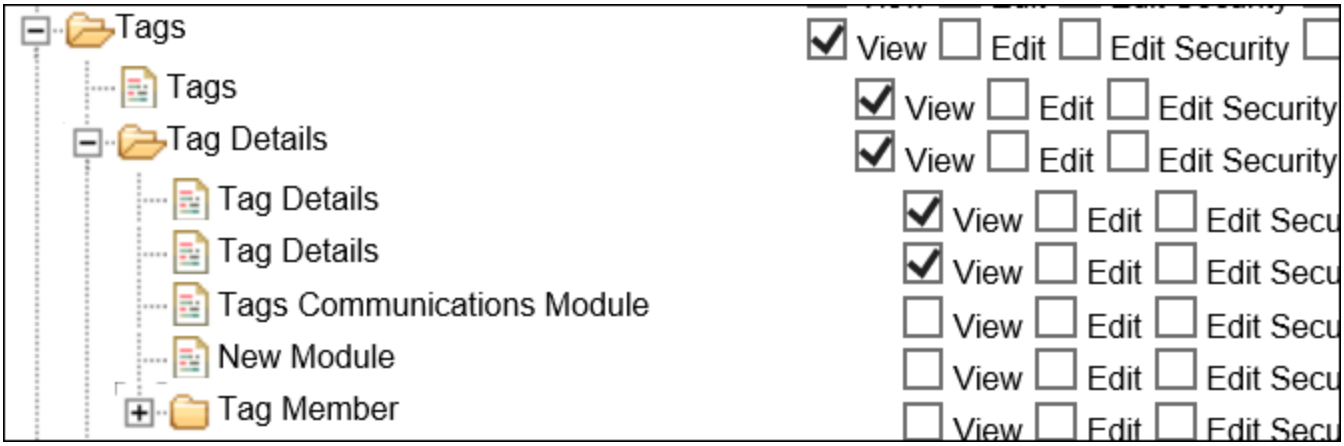
- **View** – Select this check box to give users view permission.

- **Edit** – Select this check box to give users permission to copy and edit the details of the tag.*
- **Edit Security** – Select this check box to give users permission to edit security for this tag.
- **Edit People** – Select this check box to give users permission to add, edit and remove people to/from the tag.

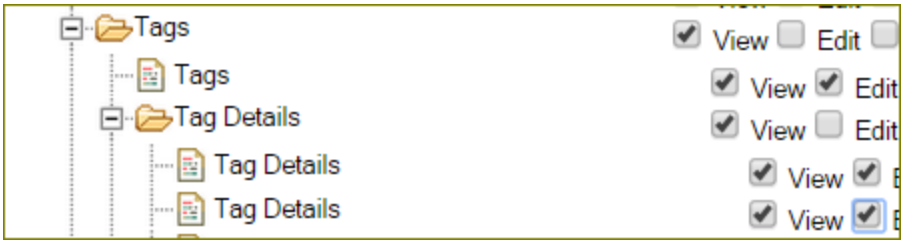
*For users to have **View** permission only for all tags, set permission on the **Pages/Module** tab as shown below.



*For users to have permission to add tags beyond the first level of the tag tree, set **View** and **Edit** permission on the **Pages/Modules** tab as shown below.

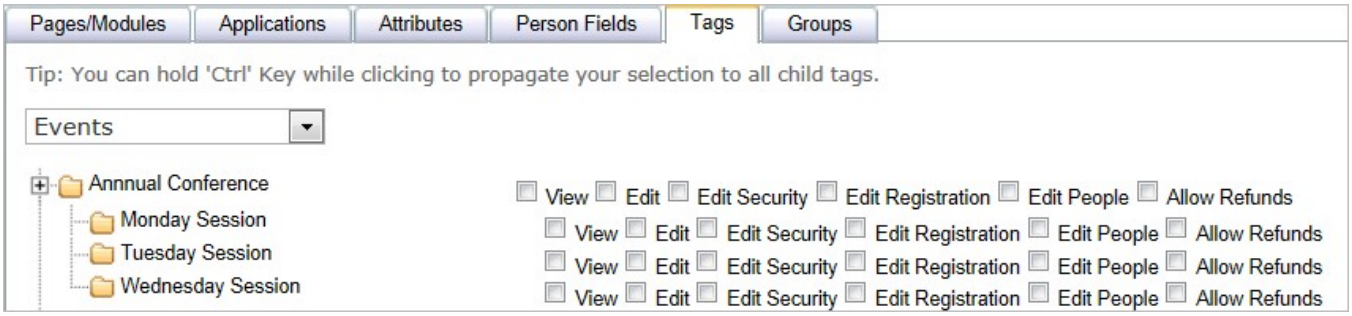


*For users to have permission to add tags at the root level of the tag tree, set **View** and **Edit** permission on the **Pages/Modules** tab as shown below.



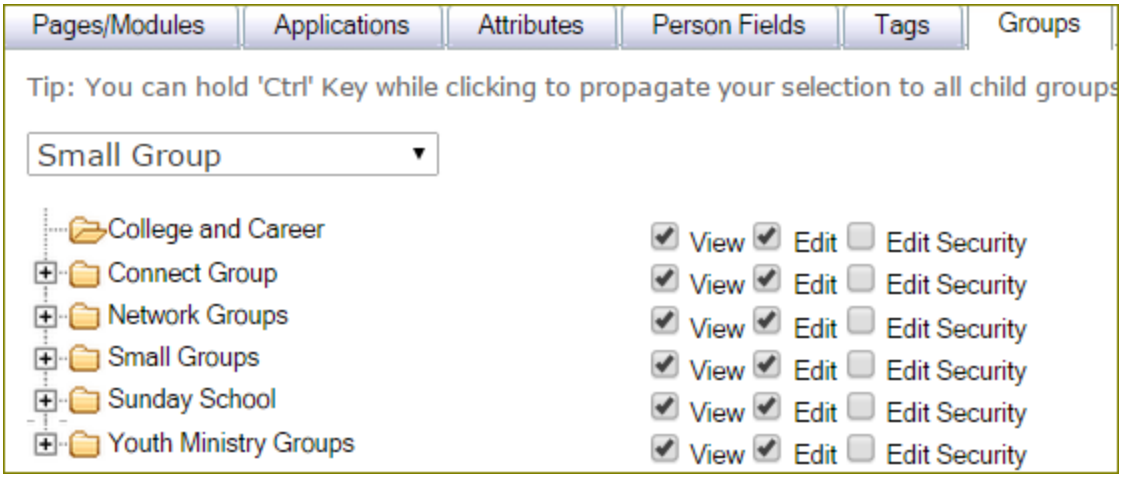
Keep in mind, you can set security tags on the **Security** tab of the tag. If the tag has child tags, you can click the **Cascade Permission** button to propagate security to all child tags.

Event Tag Permission has additional permissions for **Edit Registration** and **Allow Refunds**. Edit Registration is required to set up the registration details for the tag.

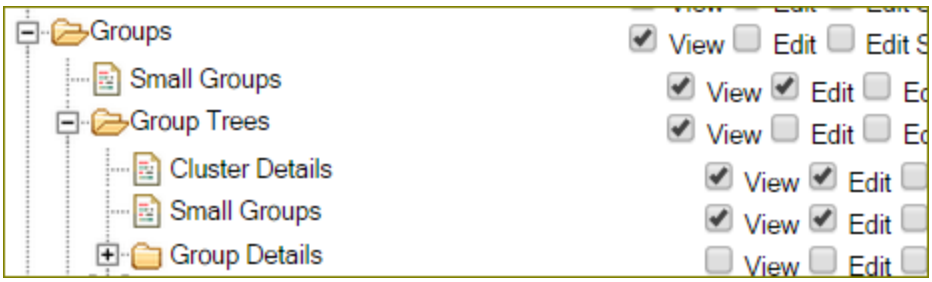


- **Edit Registration** - This permission gives users the ability to edit the information for registrants on the **Edit Registration** tab.
- **Allow Refunds** - This permission gives users the ability to process registration refunds.

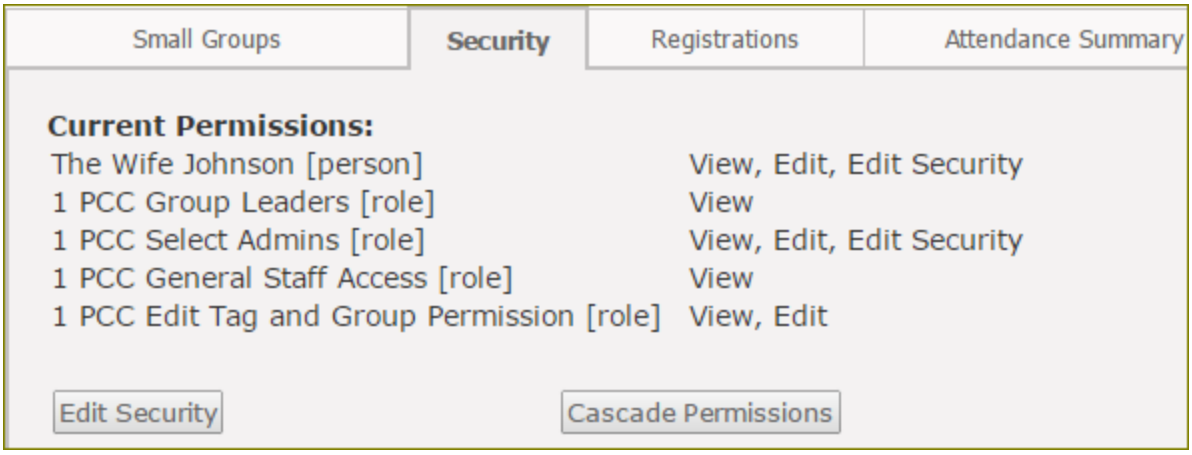
8. Select the **Groups** tab and select **Groups Type** to set permission for specific groups. The below permission gives users the permission to edit group details and edit the people in the group.



* For a user to have permission to add new group clusters, set permission on the **Pages/Modules** tab as shown below.



Keep in mind, you can set security for specific groups and group trees on the **Security** tab of the group. Click the **Cascade Permissions** button to propagate security to all groups under the current group level.



9. Click the **Save** button.

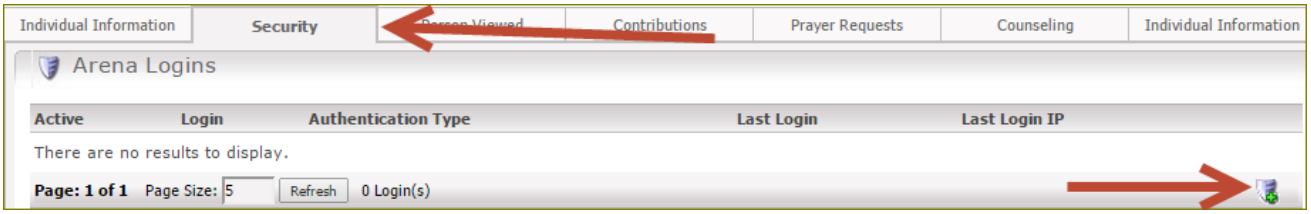
Create Logins and Add an Existing Record to a Security Role

If you have elected to use the option to Sync a Security Role with a Group, Tag, Assignment

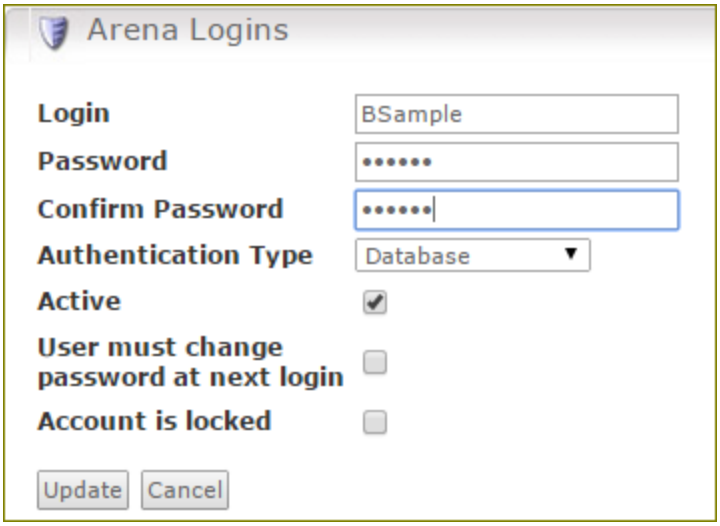
Workers or Active Directory group, add the user to the Security Role.

1. Go the **Security** tab of the record you want to add to the security role.

2. Click the **Add New Login** icon.



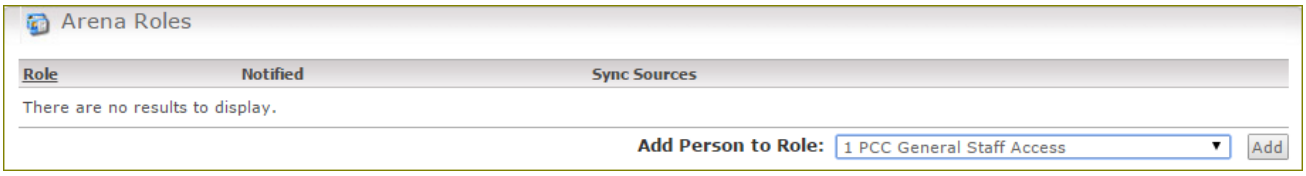
3. Enter login credentials.



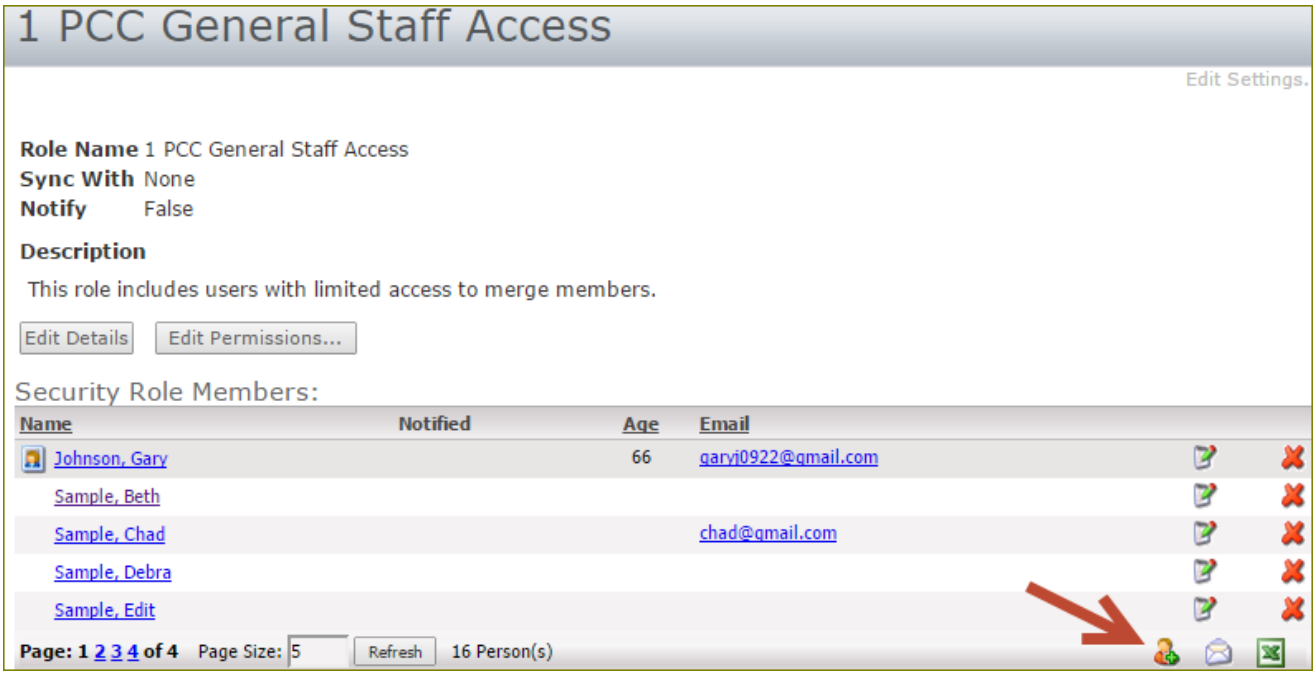
- Enter a **Login** for this user. Arena assigns a login using the first initial and last name. If more than one user has the same first initial and last name, Arena adds the next sequential numerical value to the login, e.g., JSmith2. You can optionally change logins. You can use alpha, numerical and special characters.
- Enter a **Password** for the user if using Database authentication. Passwords must be between 5 and 30 characters long and must contain at least one digit.
- Select **Authentication Type**. Options are Database or Active Directory. (For Arena Hosted you must select Database.) If using the Change Password option with Active Directory authentication, Arena attempts to change the Active Directory password.
- Leave the **Active** check box marked for active logins. Consider making logins inactive when users are away for an extended period.
- Select the **User must change password at next login** check box to prompt the user to change the password after logging in successfully the first time.
- Select the **Account is locked** check box to lock the user account.

4. Click the **Update** button.

5. From the Arena Roles section on the **Security** tab of the **Person Detail** page, select the security role you want to add the user to from the Add Person to Role drop-down list.



6. You can also add a user to the security role on the **Security Role** page.



7. Click the **Add New Security Member** button. If using the email notification option, an email notification is sent to the new user.

As you develop your security strategy, it is more efficient to copy a security role and then edit the copied security role. This is particularly more efficient in cases when you want to create an Arena Administrator security and only remove some permissions such as Security or Contributions.

Copy a Security Role

1. From the **Administration** menu, click the **Security Roles** option located under the SECURITY heading.

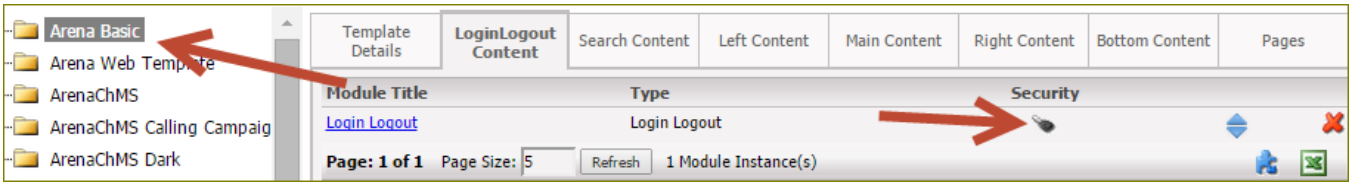
2. Select the security role to copy from the **Copy Role** list.

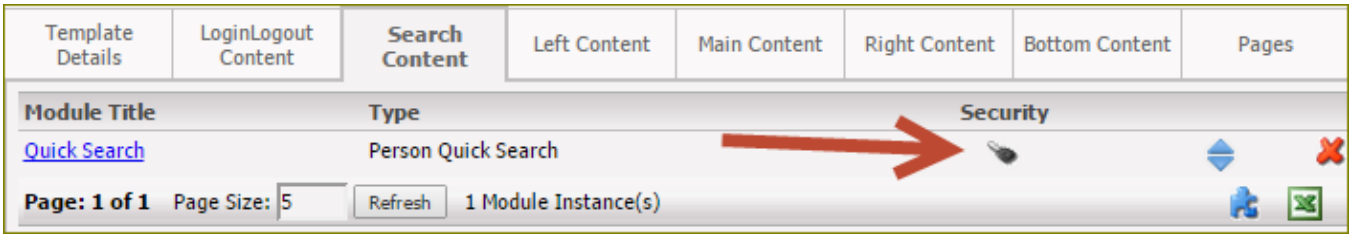
3. Enter the name for the new security role in the **As:** field.

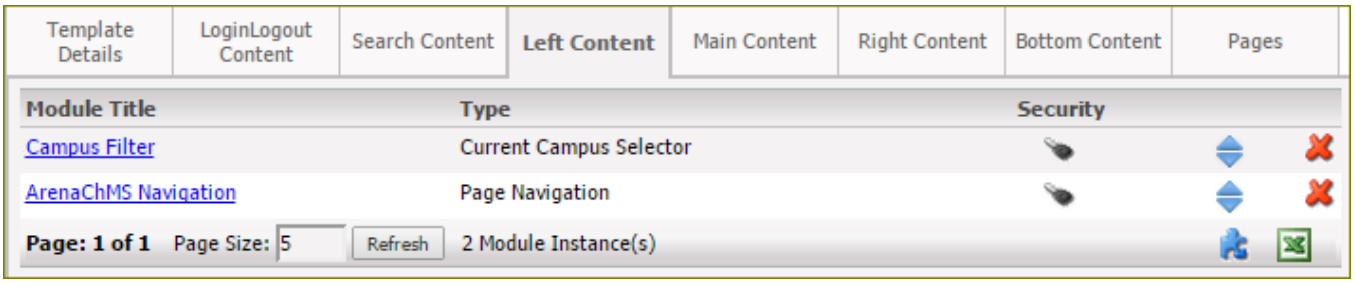
4. Click the **Copy** button to create the duplicate Security Role.

5. Edit Permissions for the copied Role.

6. If needed, verify the new security role has the appropriate permissions for the Login Logout, Quick Search and ArenaChMS Navigation modules on the Arena Basic template.

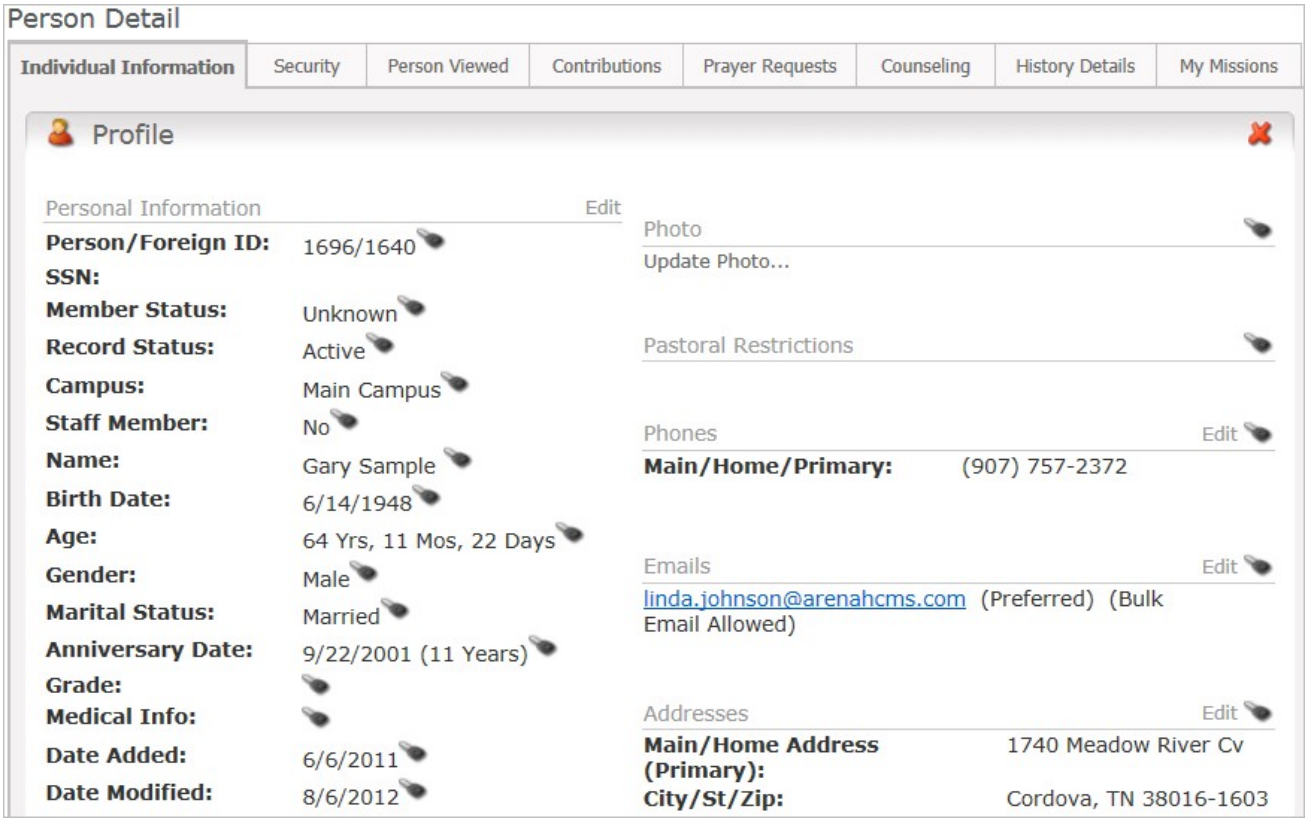






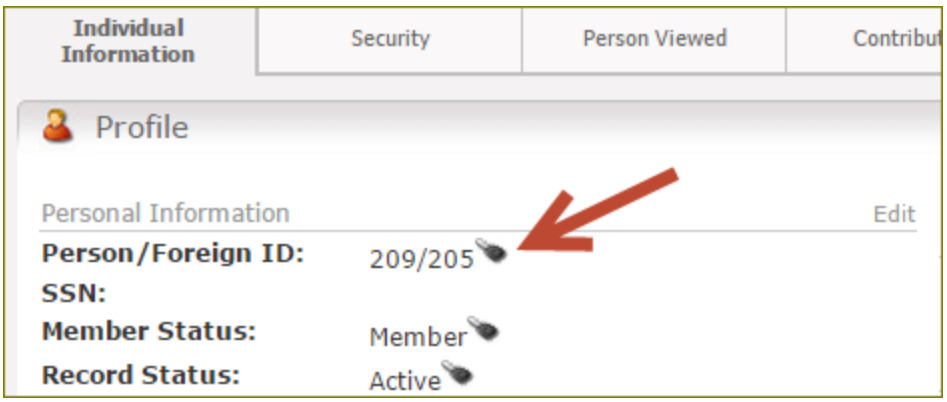
Person Detail Field Security

This page works in tandem with the Attribute and Person Fields tabs in Security Roles. While the record Arena displays is the current user logged in, security settings apply to all records. Due to the nature of this function, it is best practice to limit access to this page.

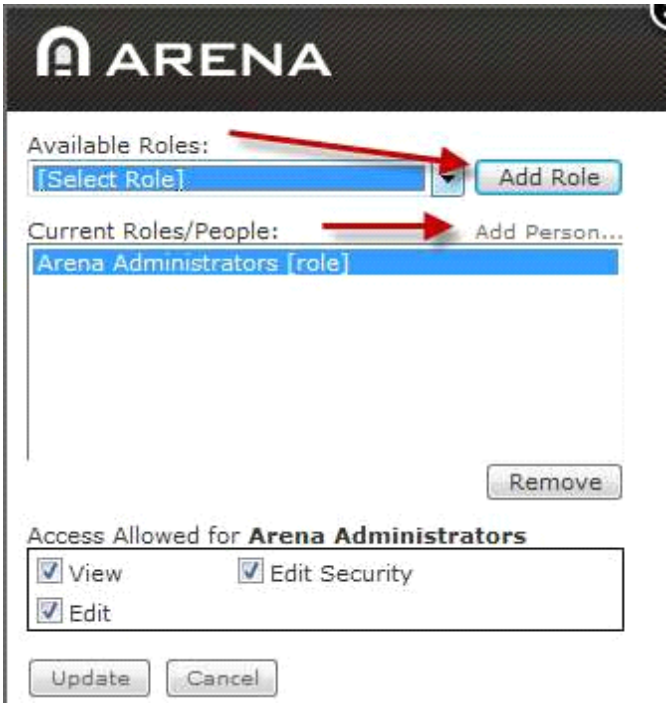


Modify Security from Person Detail Field Security page

1. Click the **Security** icon of any field or section you want to adjust.



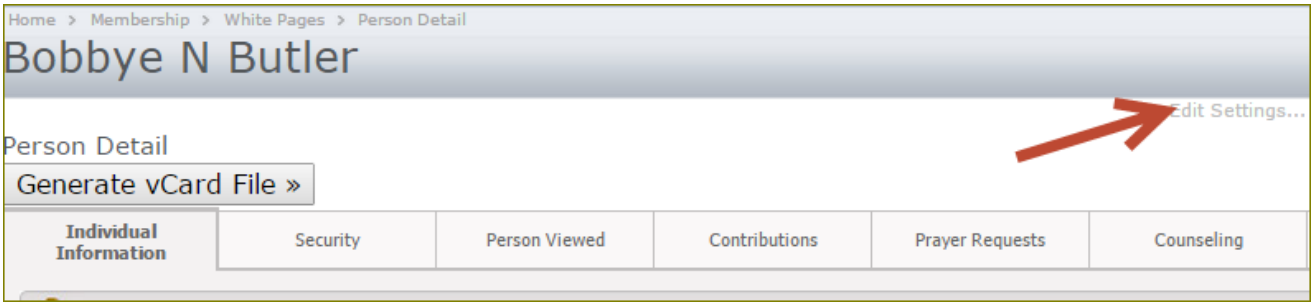
2. Make desired changes, by Security Role or by Individual. Any changes also update the respective security roles.



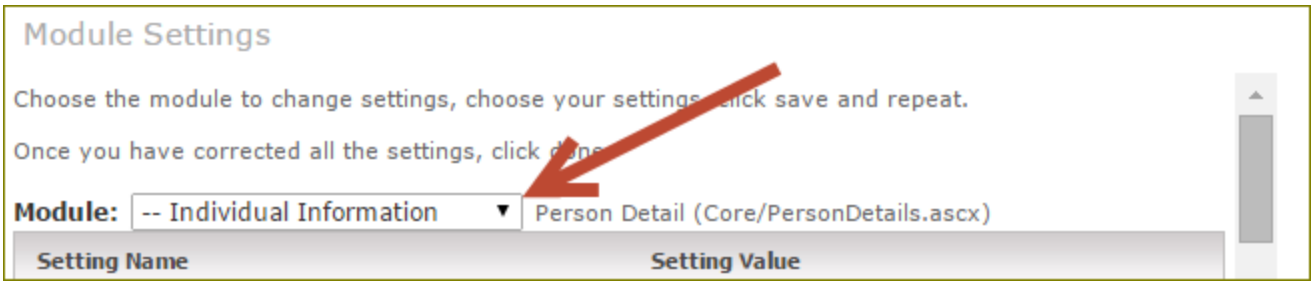
3. Click the **Update** button.

To display all field security options for the **Person Detail** page and for Arena to starting applying your security roles to this page, set Secure Fields to "True" on the Person Detail module on the **Individual Information** page.

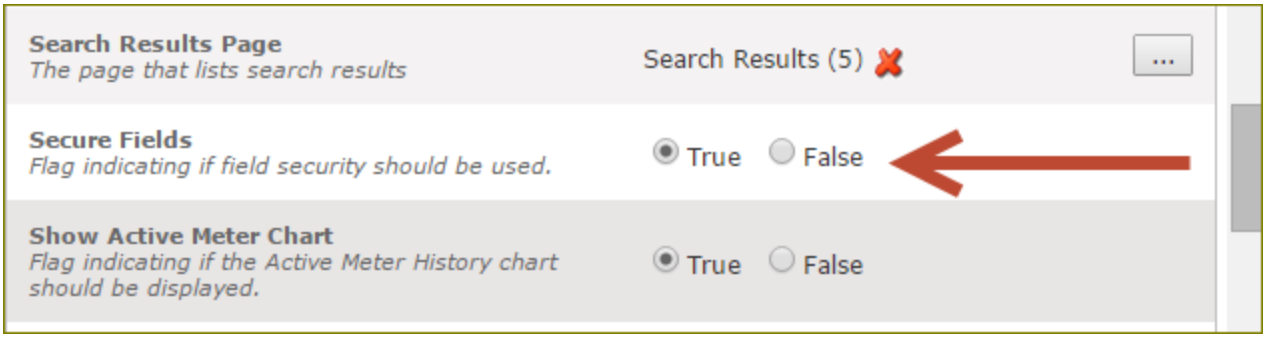
4. Click the ***Edit Settings*** link in the top right corner.



5. Select the **Individual Information** page in the Module drop-down list.

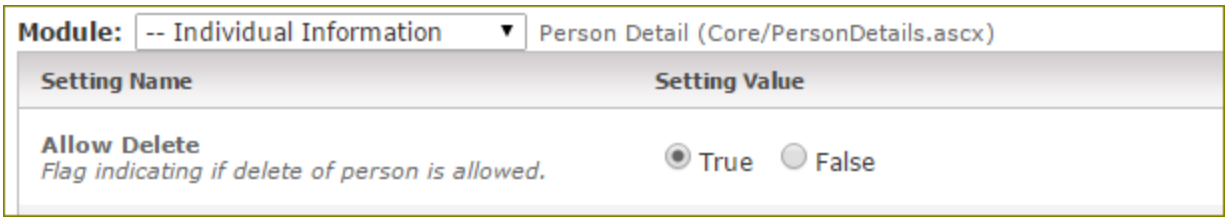


6. Set the **Secure Fields** setting to true.

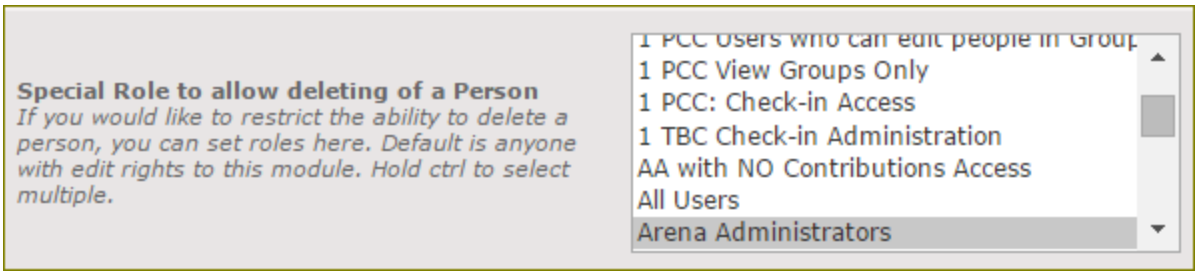


In this same module, you can also restrict which security roles can delete records.

7. Set the **Allow Delete** to true.



8. Select the security role(s) that can delete records.



9. Click the **Save** button.

10. Click the **Done** button.

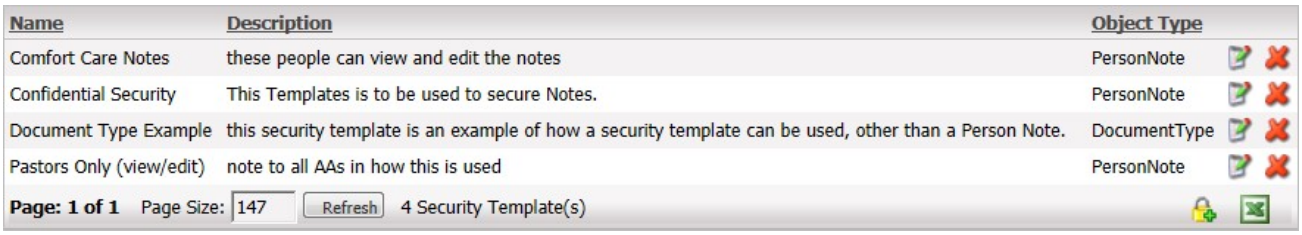
11. Refresh Cache.

Security Templates

Security templates allow you to define different permission sets that use often, rather than manually adding all the security roles each time you edit security. Their object types (tags, person notes, pages, etc.) define these templates.

Create a Security Template

1. From the **Administration** menu, click the **Security Templates** option located under the SECURITY heading.



Name	Description	Object Type
Comfort Care Notes	these people can view and edit the notes	PersonNote
Confidential Security	This Templates is to be used to secure Notes.	PersonNote
Document Type Example	this security template is an example of how a security template can be used, other than a Person Note.	DocumentType
Pastors Only (view/edit)	note to all AAs in how this is used	PersonNote

Page: 1 of 1 Page Size: 147 Refresh 4 Security Template(s)

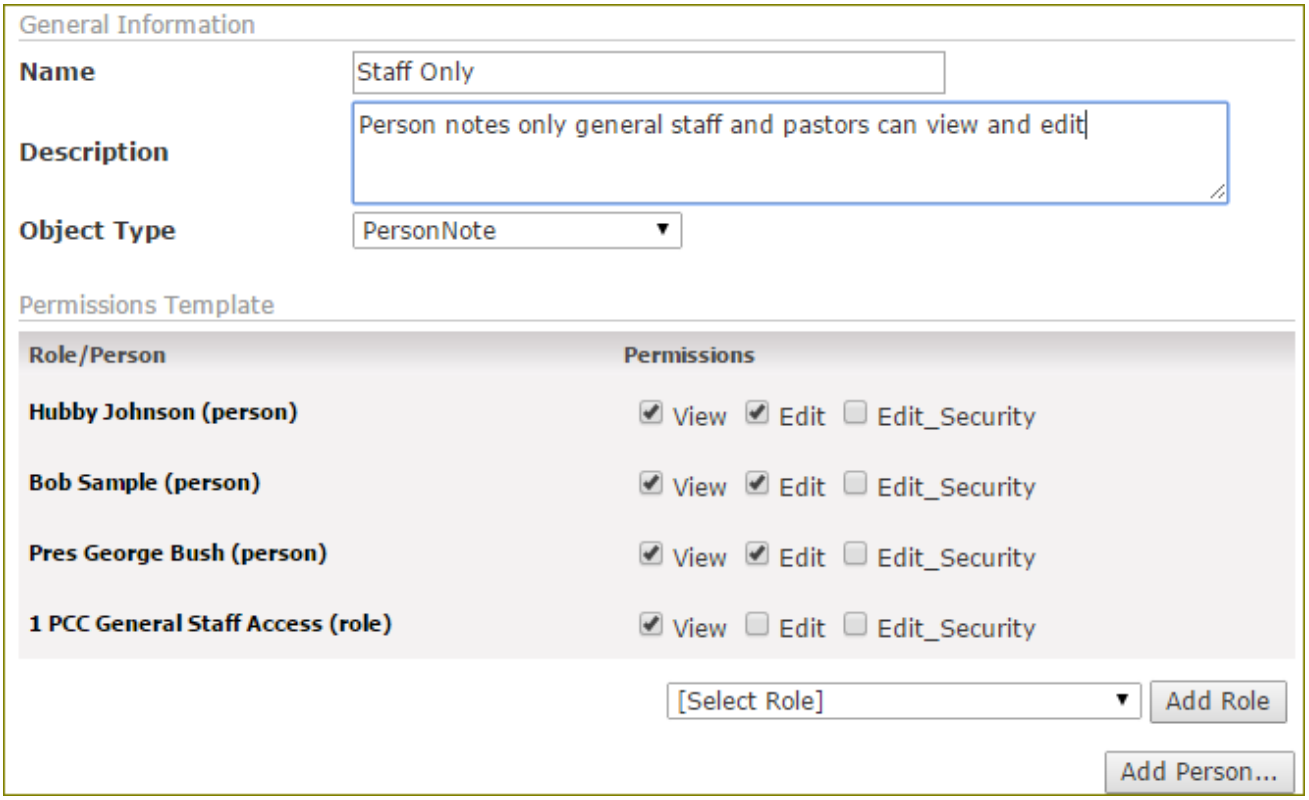
2. Click the **Add New Security Template** icon.

3. Enter the **Name** for this Security Template.

4. Enter a **Description** for this Security Template.

5. Select **Object Type**. Available objects include Portal, Page, Module (module), Tag, Attribute, Attribute Group, Metric, Report, Group Cluster, Application, Person Field, Person Note, Document Type, Assignment Type, Background Check Type, and API Application.

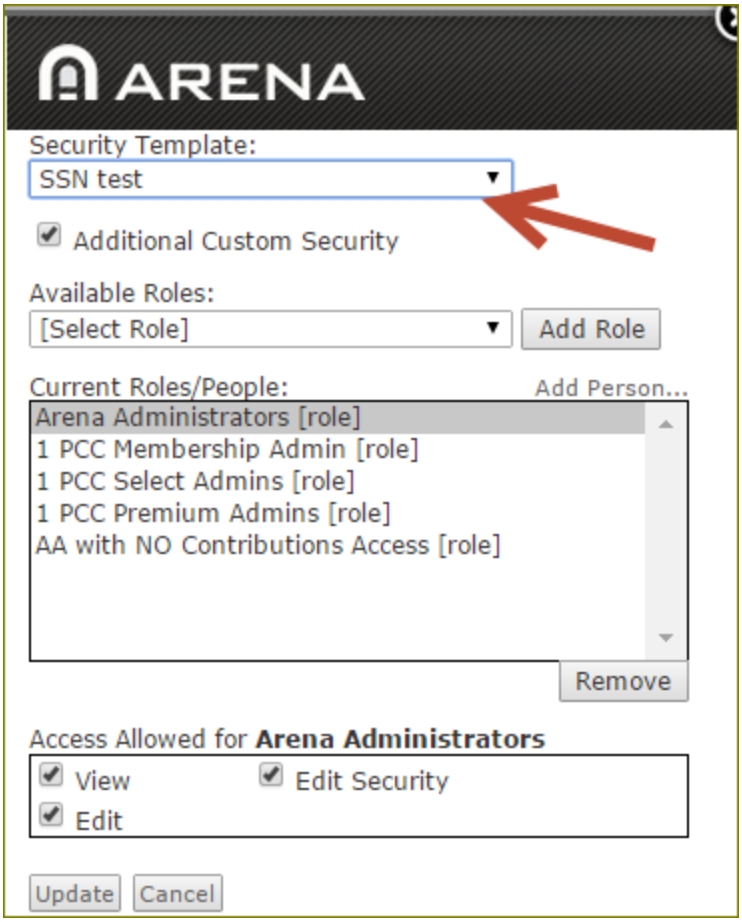
6. Select the Security Roles or add individual records to this Security Template.

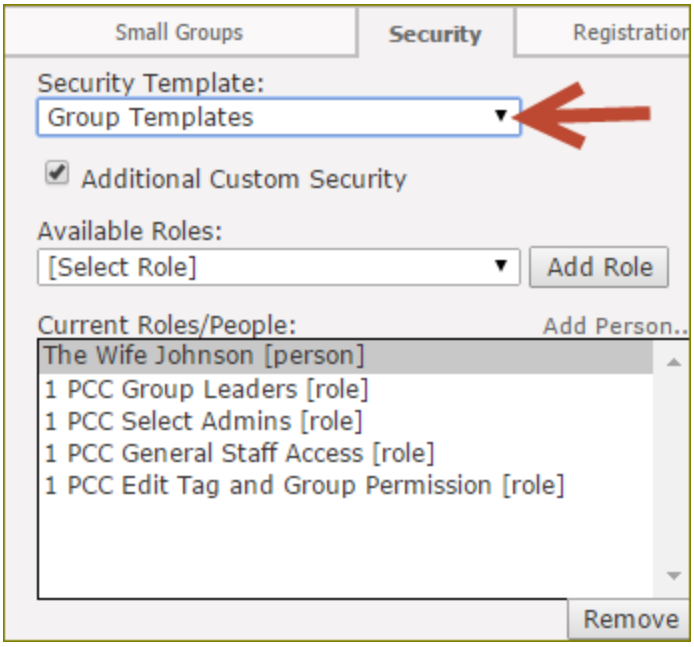


7. Set permissions.

8. Click the **Update** button.

When applying a security template to additional objects such groups, tags and person fields, the security template is available in the security pop-up window.



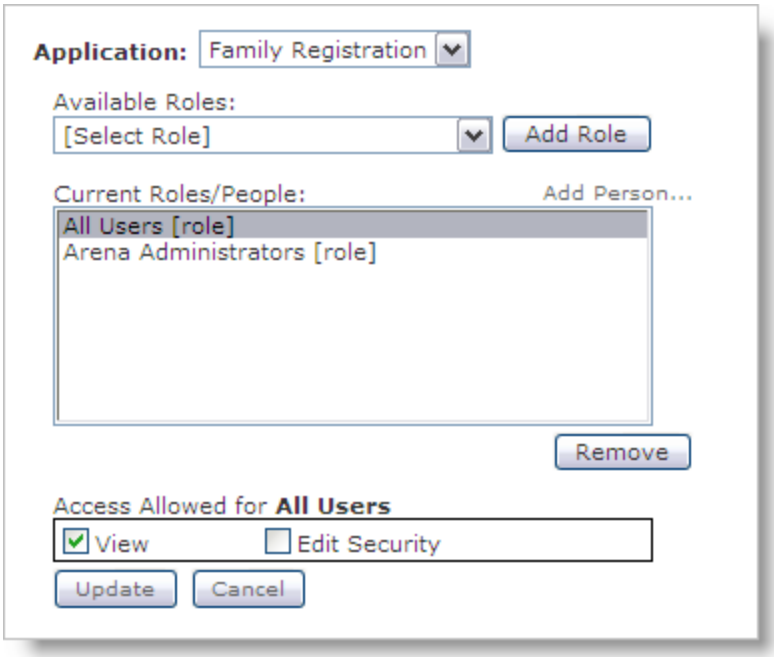


Application Security

Similar to setting permissions on the **Application** tab of a security role, you can set permissions for the Check-In, Family Registration (Self-hosted only), Contributions, Mailing and Remittance Mailing click-once applications and Arena Hub.

Update Application Security

1. From the **Administration** menu, click the **Application Security** option located under the SECURITY heading.
2. Select the desired Application from the Application drop-down list.
3. Click the **Edit Security** button.
4. Select a Security Role or a Person.
5. Modify permissions. If using Security Roles, permissions update the Security Role.



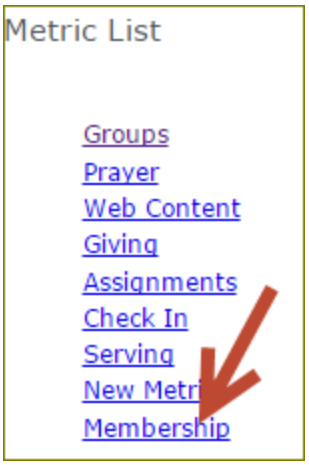
6. Click the **Update** button.

Metric Security

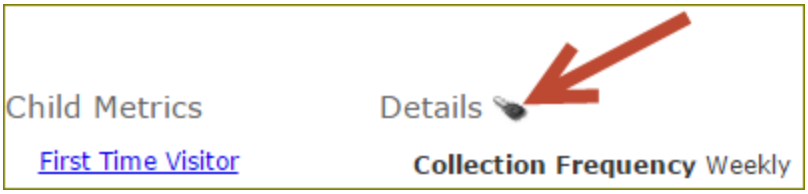
Arena has the option to set security for specific metrics. Arena Administrators can set View and Edit permissions for individual users and specific Security Roles for each metric. If a metric has child metrics, take into consideration the parent and child metrics when setting security. In addition to View permission for the **Metrics** page and Metric Chart module, you can apply the below steps for individual metrics. Keep in mind that if you elect to apply **Edit** permission for a metric, also apply **Edit** permission for the Metric Chart module. **Edit** permission is then only available to the individual metrics to which you apply **Edit** permissions.

Set Metric Security

1. Select the **Metric** you want to set security.



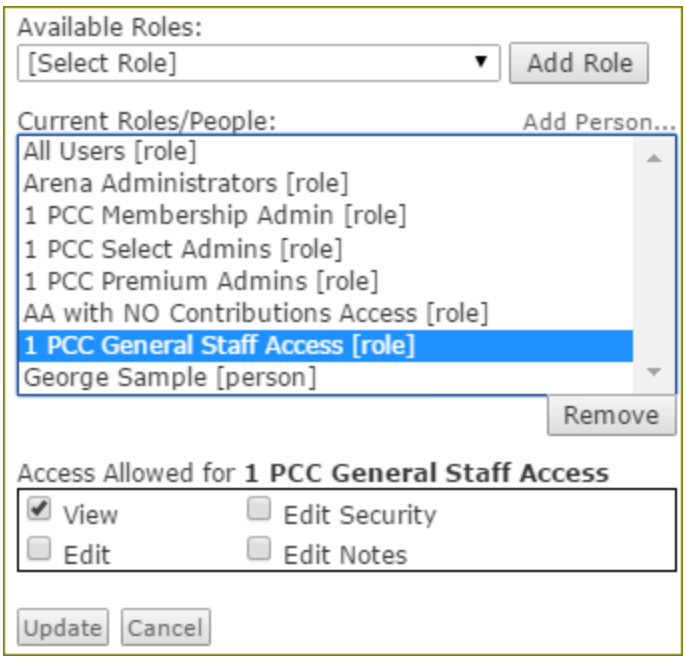
2. Click the **Security** icon of the metric you want to set security.



3. From the **Available Roles** drop-down list, select the security role you want to add. Click the ***Add Person*** link to search and select a specific record.

4. Click the **Add Role** button. If adding an individual person, once you select the person from the **Popup Person Results** page, they are listed in the Current Roles/People window.

5. With the role or individual person selected, select the permissions you want to apply.



6. Click the **Update** button.

Configuring Arena

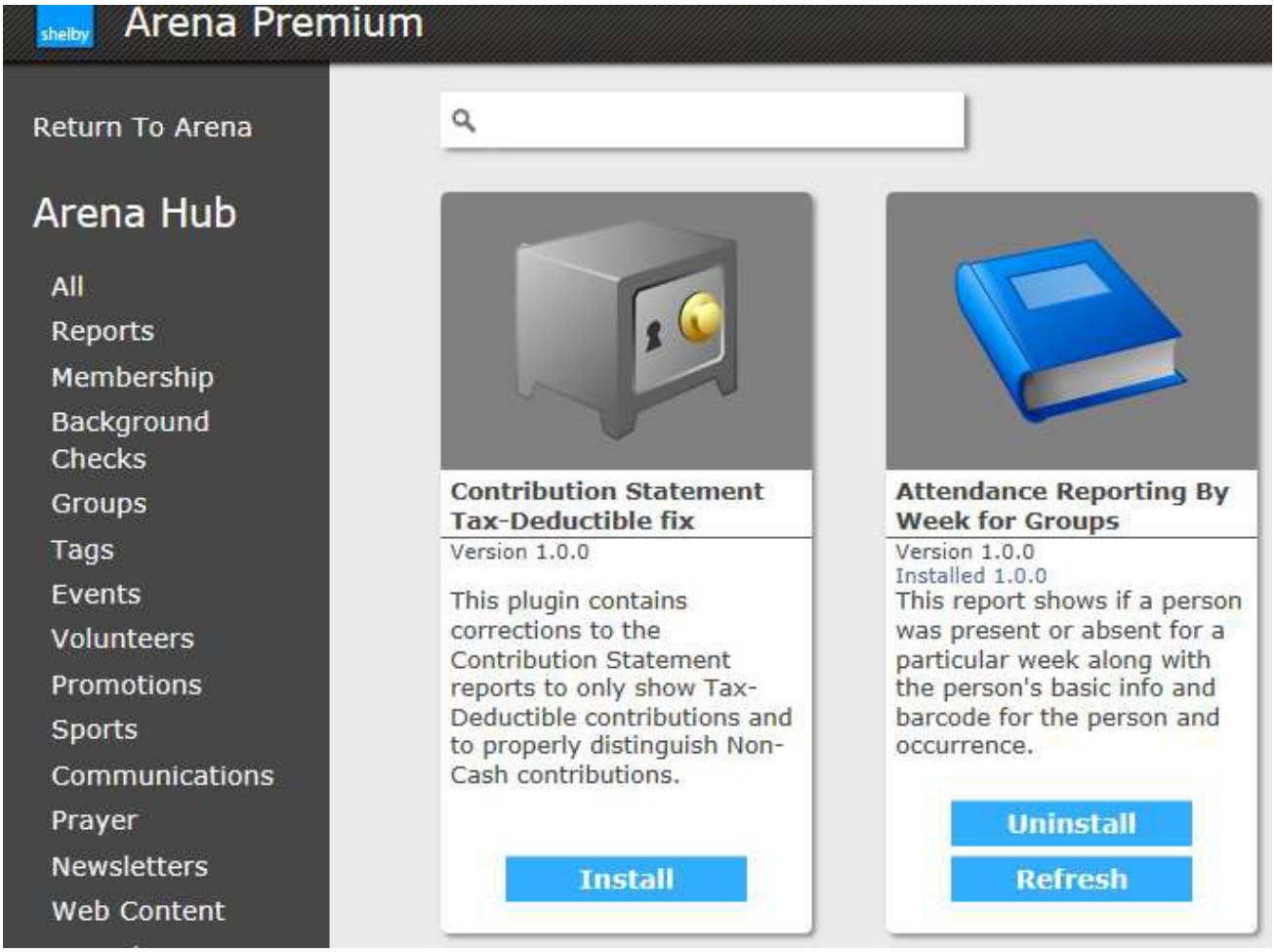
Many areas of Arena are pre-configured while others are configured as your organization implements specific features. For this section, we focus on areas that are both broadly applicable and feature specific.

Arena Hub

The Arena Hub is a Microsoft NuGet® plugin technology that enables the ability to upload to a central repository (Hub) so all Arena clients can access. NuGet plugins provide a way to install SQL code, files and reports directly to Arena without needing access to the web server or SQL server and therefore removing the necessity for an executable.

In the past, the installer implemented the reports, which took additional time in the installation

process. The installer now only places the reporting services folders in the proper locations. All current customers can install the plugin, but it simply checks to make sure the reports are there and up to date.



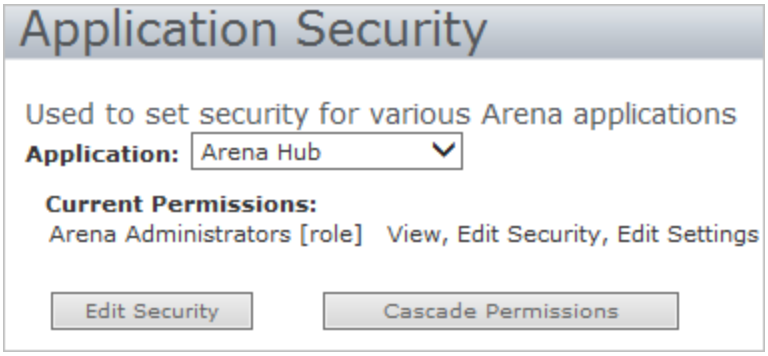
Download Arena Hub Items

At install, users in the Global Administrator security role have access to Arena Hub. Prior to installing Arena Hub items, verify you have access. (When adding reports from Arena Hub, users need rights to save an .rdl file in Reporting Services in Site and Folder Settings.)

1. Log in as a Global Administrator. Use the Global Admin login credentials or temporarily add yourself to the Global Administrator security role.

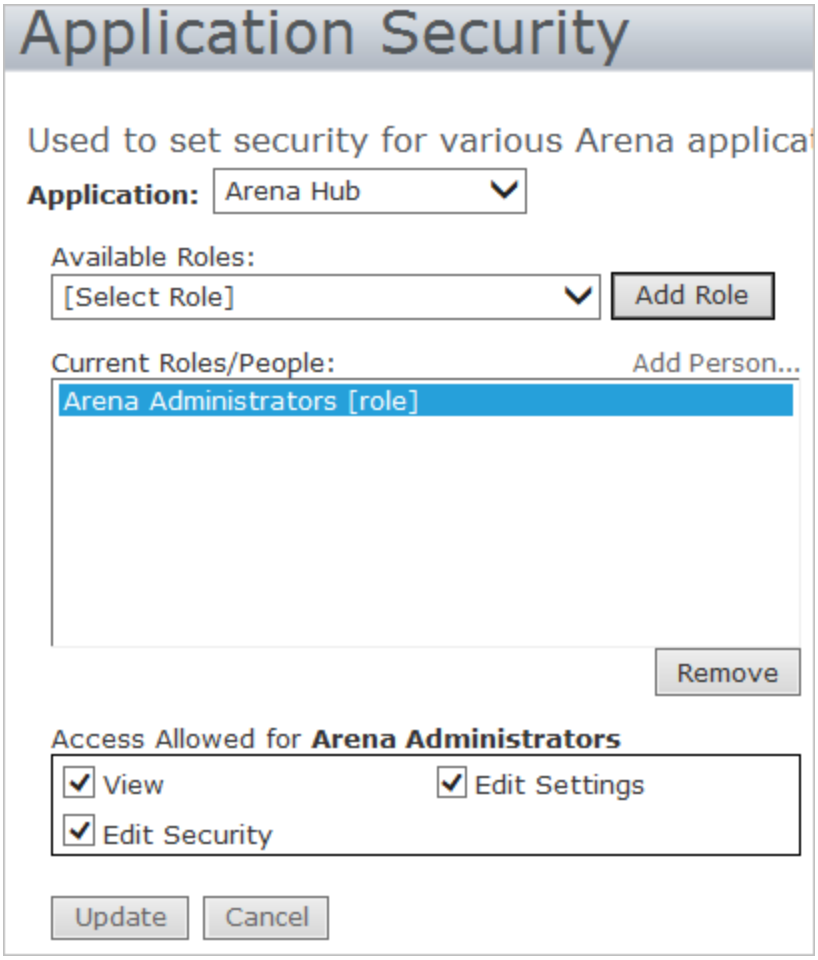
2. From the **Administration** menu, click the **Application Securit**y option located under the SECURITY heading.

3. Select **Arena Hub** from the Application drop-down list.



4. Click the **Edit Security** button.

5. Add the Arena Administrator security role.



6. Select **View**, **Edit Settings** and **Edit Security** permissions.

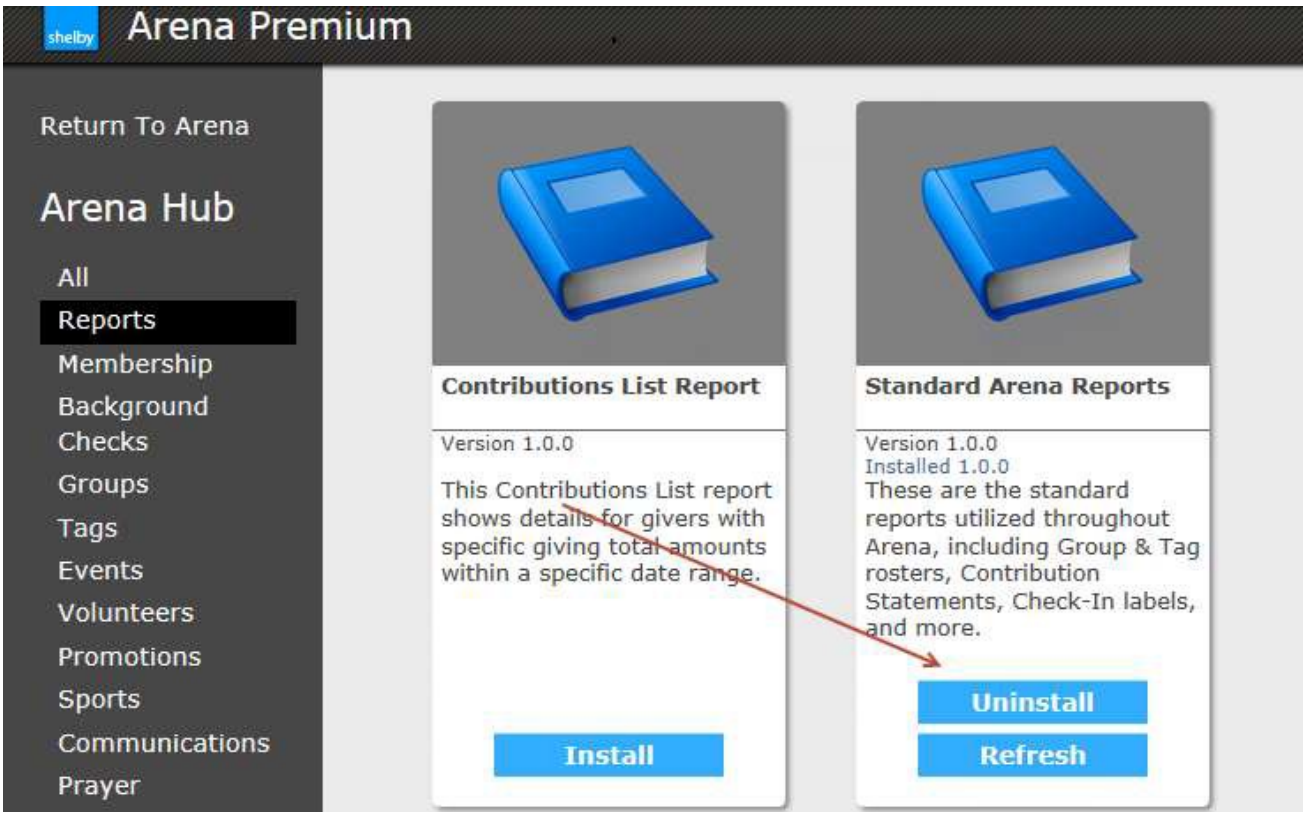
7. Click the **Update** button.

8. Refresh cache.

9. Remove your record from the Global Administrator security role.

10. Login in again and verify access.

11. Select the item you want to add.



12. Review the details for this install. Make note of the support resource for custom reports/modules.

13. Click the **Install** button to complete.

14. Verify the item installed. Arena installs reports in default folders, assuming the folders are accessible in Arena. If the folder is not visible, you can add a page with the folder specified in the Report Viewer module. Modules that require new pages display in navigation.

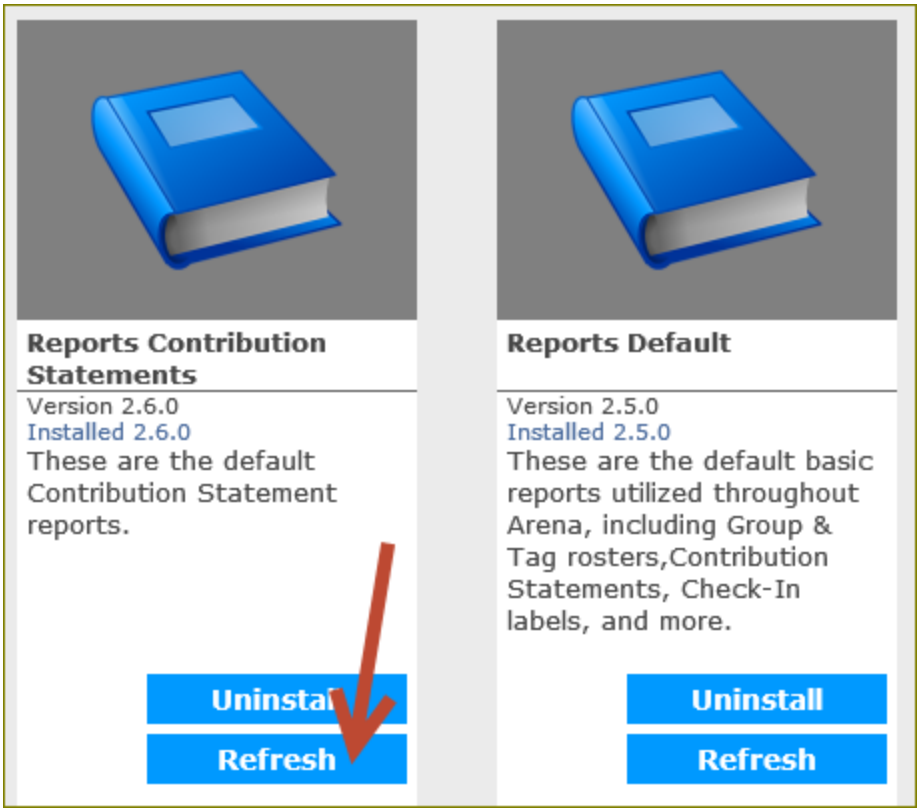
15. Set security for new reports/modules.

Update Arena Hub Items

On occasion Shelby updates different Arena Hub objects such as reports. Follow the steps below

to update such elements.

1. Log in to Arena with the needed Arena Hub permissions.
2. From the **Administration** menu, click the **Arena Hub** option located under the ADMIN heading.
3. Locate the element to update.
4. Click the **Refresh** button.



5. Validate report/module.

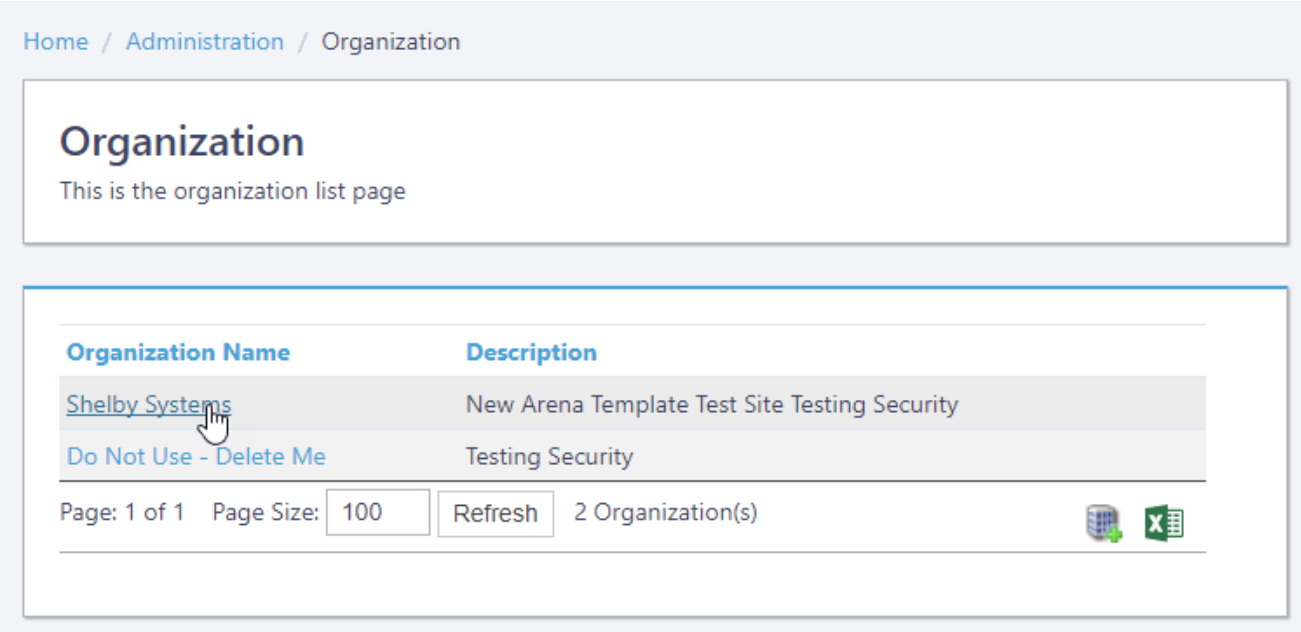
Organization

An Organization is the Organization Entity itself. This page displays the settings for the Arena application such as SMTP Server information, Report Services URL, and various user names. These settings work in tandem with settings in the web.config file, located within the Arena installation folder on the Web Server, to make Arena function properly. Many of the values are set during the installation process but it is always a good idea to be familiar with the available settings. *New Arena installs do not require you to require new Keys.*

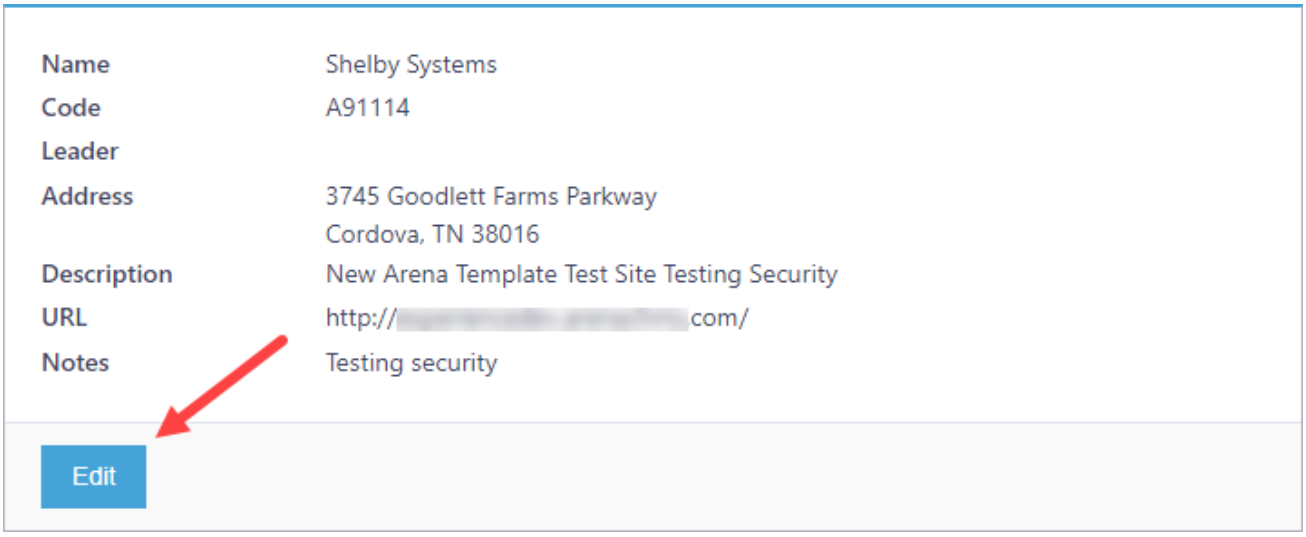
Update Organization Details

1. From the **Administration** menu, click the **Organizations** option located under the CONFIGURE heading.

2. Select the **Organization**.



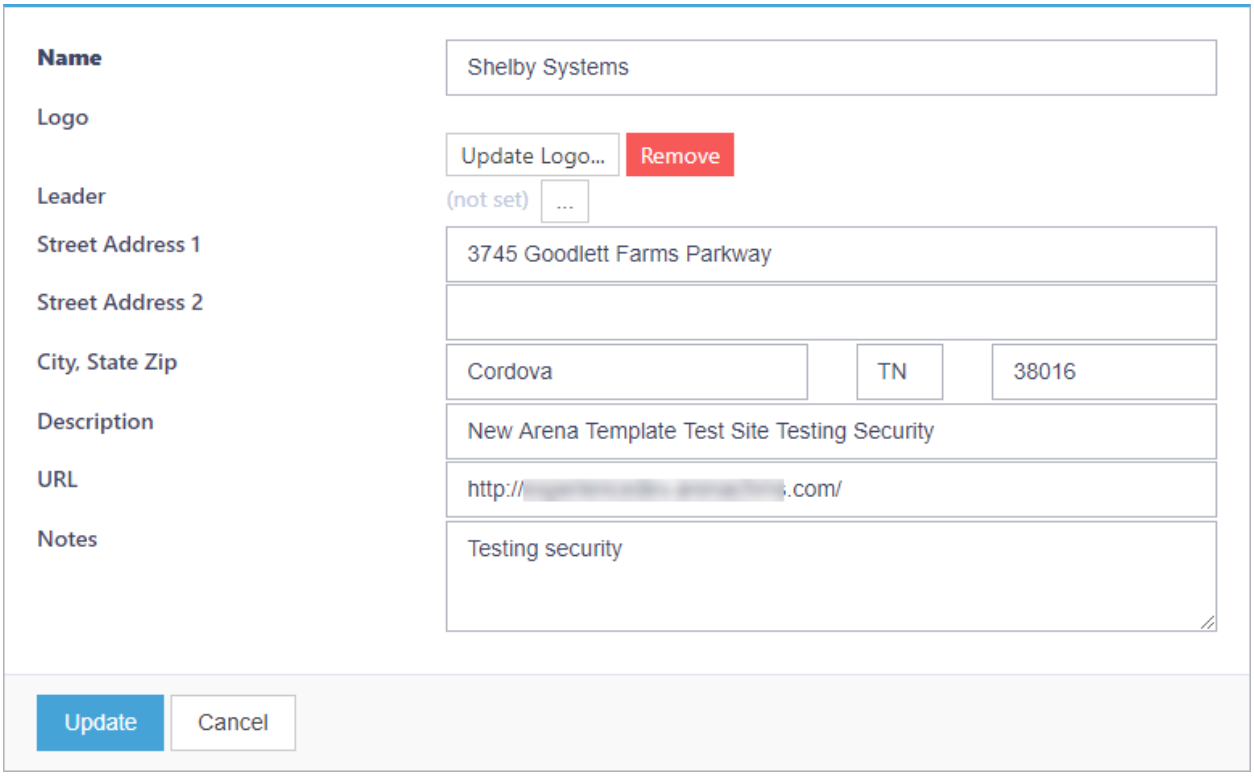
3. Click the **Edit** button. The Code is the license number, which is not editable.



4. Update the fields.
   - **Name**: Update the organization name, as desired.
   - **Leader**: Click the ***Change*** link to search and select records the leader. Click the ***Remove***

link to remove the current Leader.

- **Address**: Update the address of the main location for the organization.
- **URL**: Update the URL for the organization. This should be the Arena URL for your organization and should be the same as the Application URL Path and Public URL setting in the web.config file.
- **Notes**: Enter notes for this organization.



5. Click the **Next** button.

Organization Settings

Now you are ready to review and customize Organization Settings. Organization Settings are both system settings and feature specific settings. To view the settings and their values, click the ***Organization Name*** link. Settings are listed in alphabetical order and grouped by Category. Many settings are preset with default values while others are not set. It is recommended to review all settings, especially those that are pertinent to the features your organization is using.

- **Setting**: This is the name of the Key such as "SMTP Server."
- **Category**: This option allows for grouping of the various Keys. The various Categories are setup as a Lookup.

- **Description**: This is the description of the Key such as "Mail server name."
- **Value**: This is the actual Key setting, such as "Mailserver" or True/False. As you customize organization settings, be aware of default value formats (e.g., true/false, numeric, email, etc.)

Show Category All

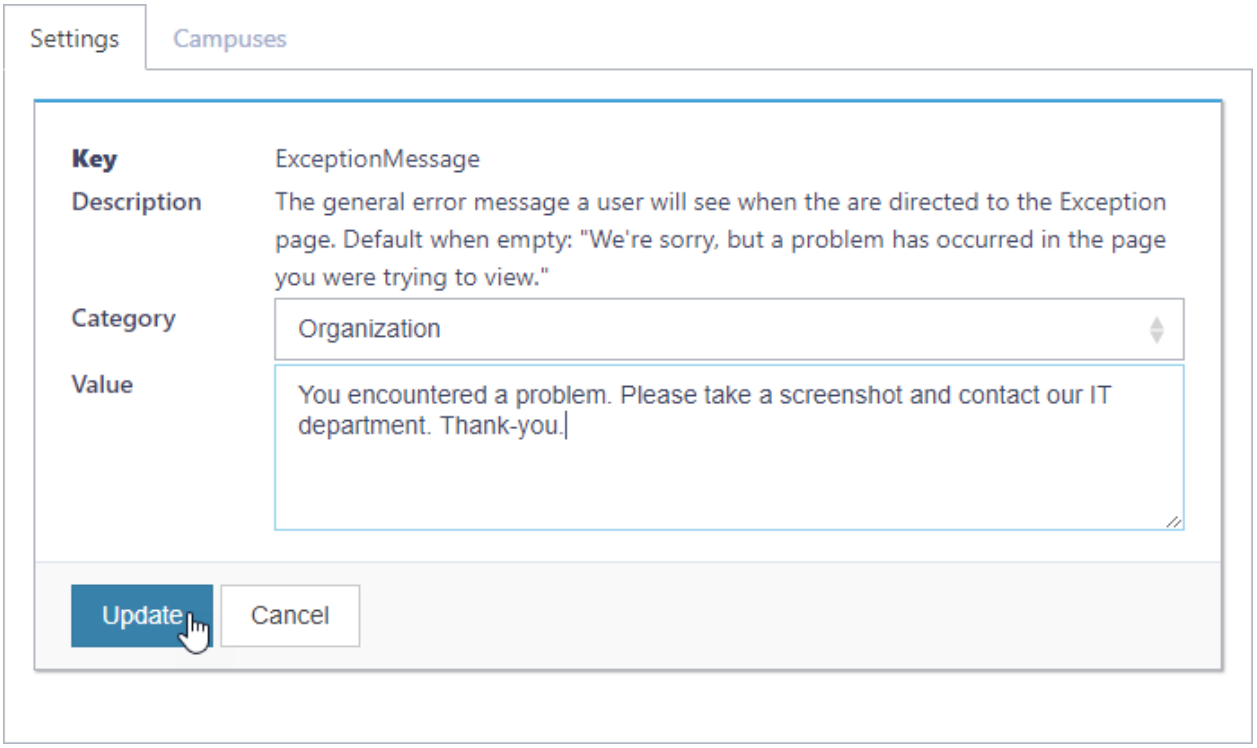
Setting	Category	Description	Value
1stDayOfWeekScore	Organization	Score for automatically entering a user into a Small Group based on their search criteria. If the user's first day choice matches, this score is added to the running total.	4.5
2ndDayOfWeekScore	Organization	Score for automatically entering a user into a Small Group based on their search criteria. If the user's second day choice matches, this score is added to the running total.	4
ActiveMeterChartDuration	Organization	The duration (in years) to populate the active meter history chart on the person details page.	1

For example, you may want to customize your Exception messages by changing the standard message and title. Those settings are controlled by the **ExceptionMessage** and **ExceptionTitle** settings.

ExceptionMessage	Organization	The general error message a user will see when the are directed to the Exception page. Default when empty: "We're sorry, but a problem has occurred in the page you were trying to view."
ExceptionRecipient	Exception Processing	Email address of the person that should receive exceptions, if SendExceptions settings is 'true'.
ExceptionTitle	Organization	The title that will display on the page when a user sees an exception. Defaults when empty: "Exception"

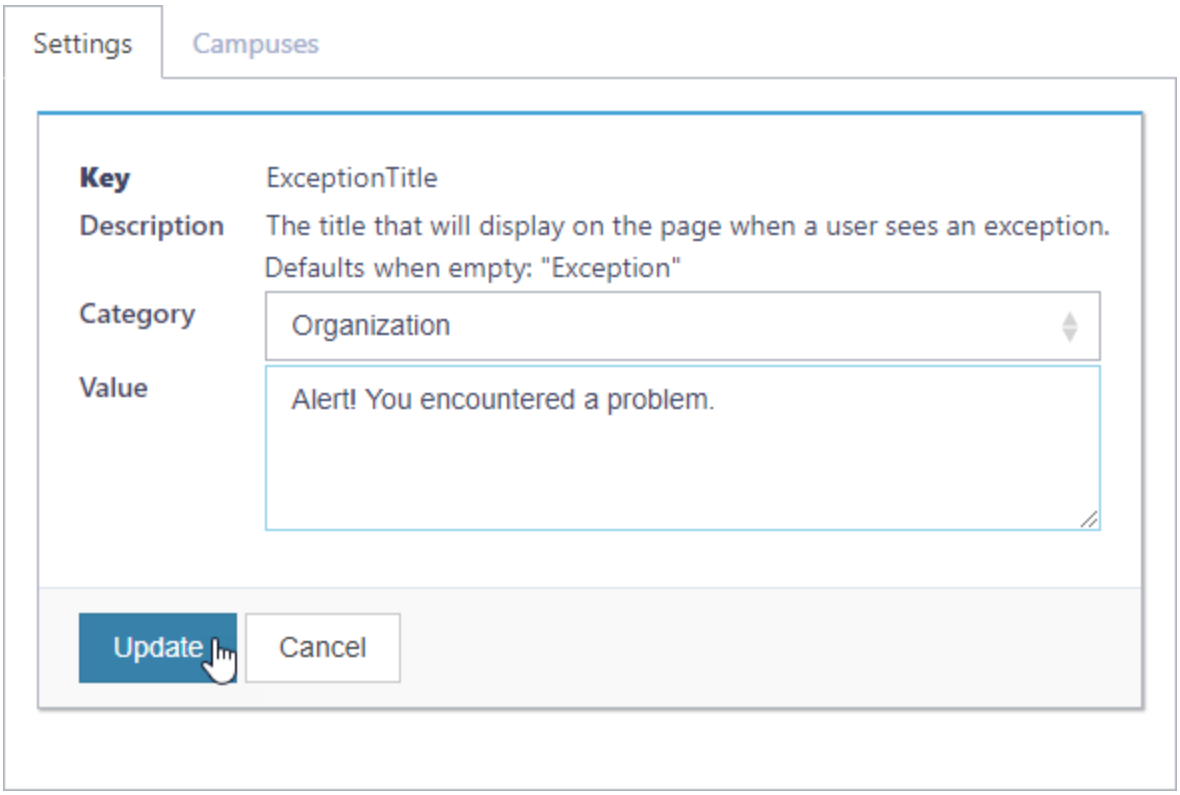
ExceptionMessage

Click the ***ExceptionMessage*** link to make changes to the standard exception message. Click the **Update** button when you are finished.



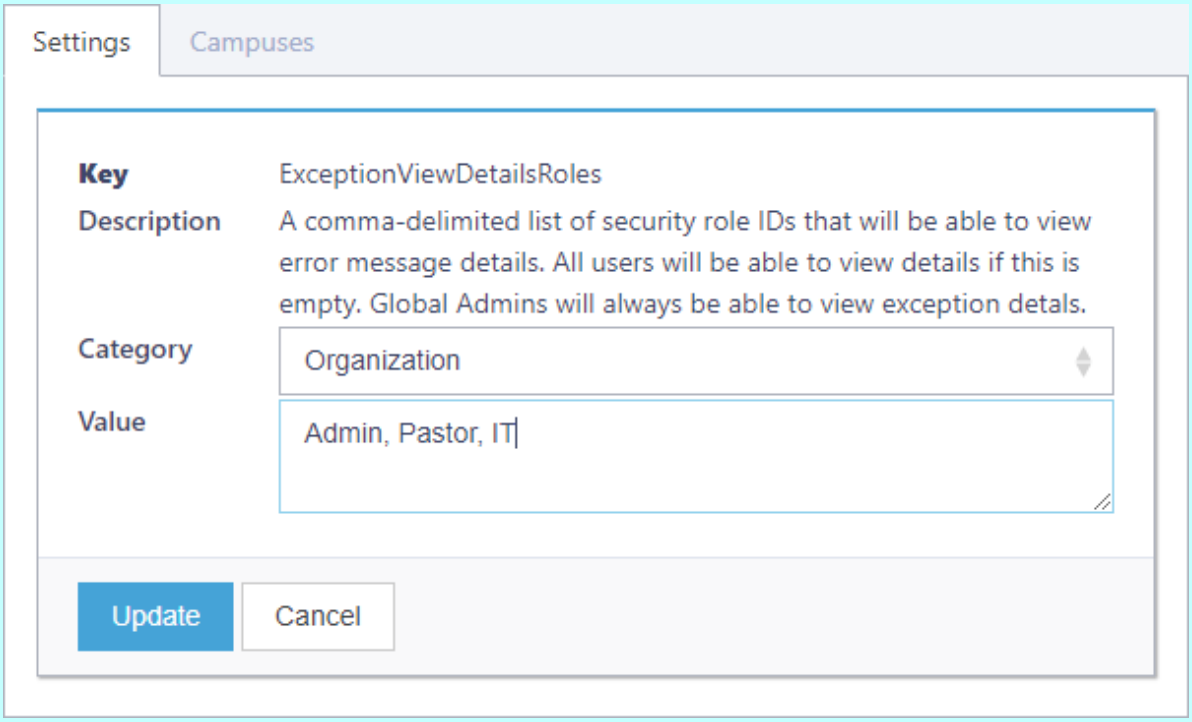
ExceptionTitle

Click the ***ExceptionTitle*** link to make changes to the standard exception title. Click the **Update** button when you are finished.



ExceptionViewDetailsRoles

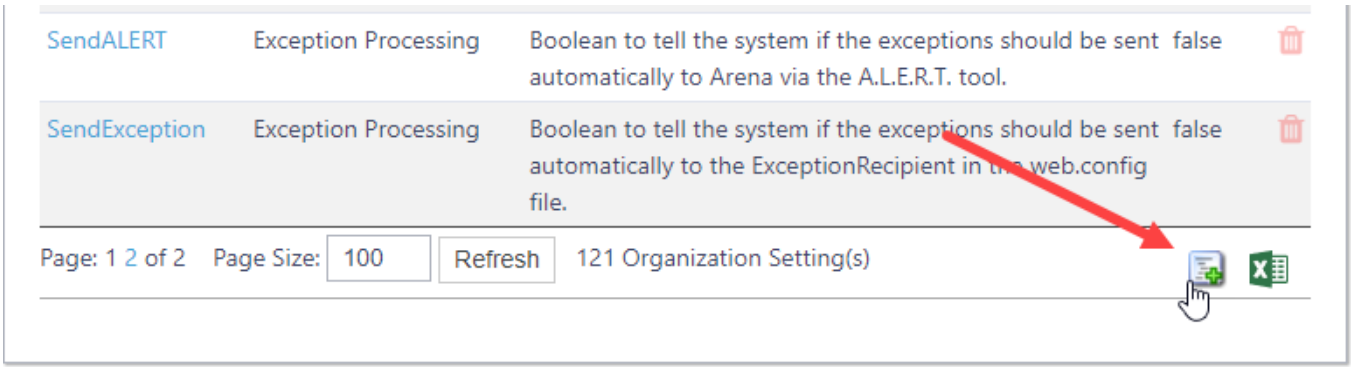
The **ExceptionViewDetailsRoles** setting can be used to limit which security roles can see the full exception details.



Adding an Organization Setting

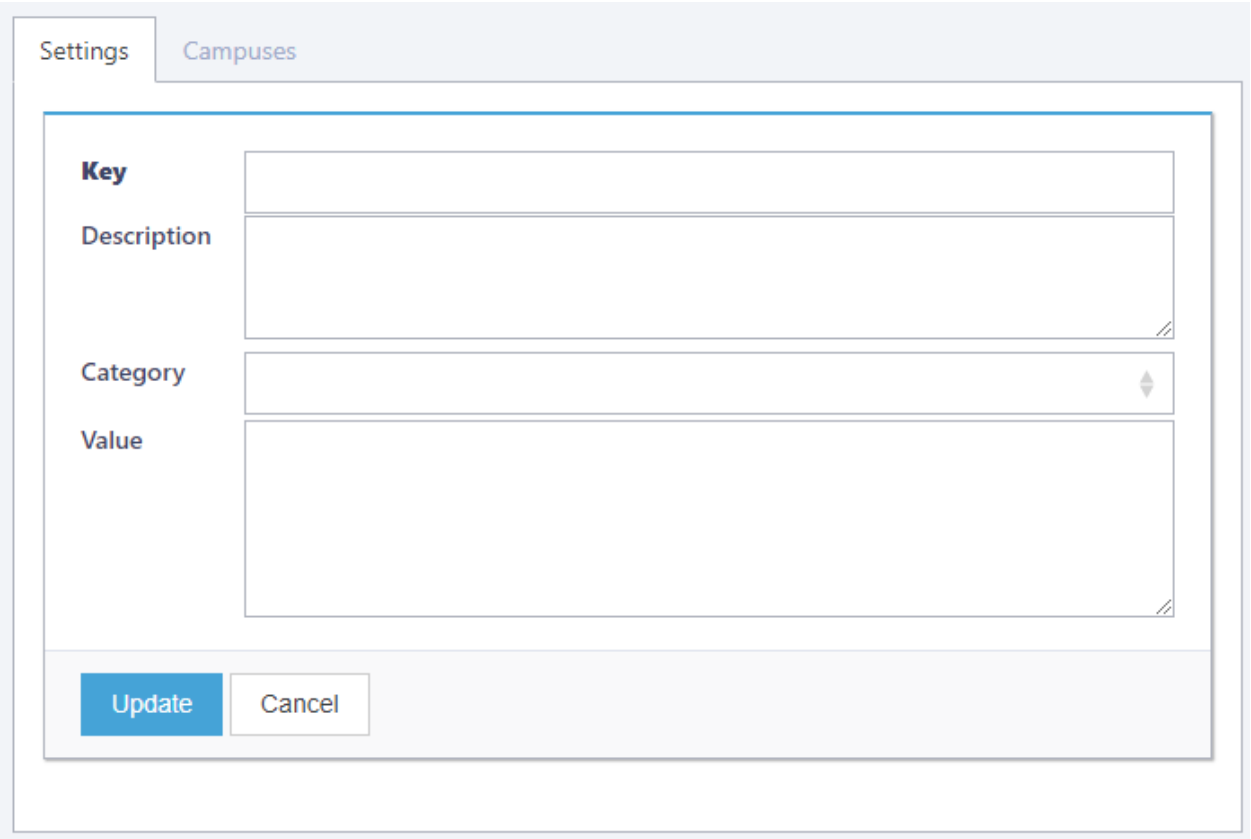
On occasion, you need to add organization settings. Follow the below steps to add an organization setting.

1. On the **Organization Settings** page, click the **Add New Organization Setting** icon.

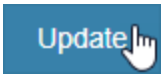


2. Complete all fields.
   - **Key**: Enter the value key for the new organization setting.
   - **Description**: Enter a description for the new organization setting.

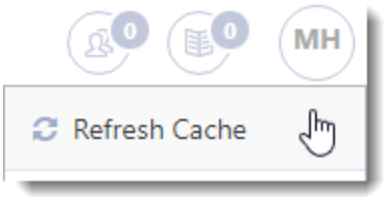
- **Category**: Select a category for the new organization setting. You can customize the available values in the Organization Setting Categories Lookup.
- **Value**: Enter the value for the new organization setting.



3. Click the **Update** button.



4. Refresh Cache.

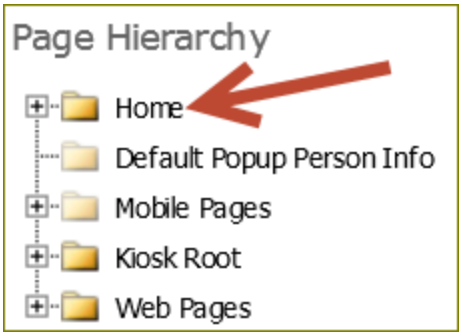


Campus

If your organization is multi-campus, you can designate members, groups and tags by campus. First add the required pages and modules. Follow the below steps to add the required pages and modules. Keep in mind new pages inherit modules of the parent page so you can either remove the module or simply change to the required module for the respective page.

1. From the **Administration** menu, click the **Pages** option located under the WEBSITE heading.

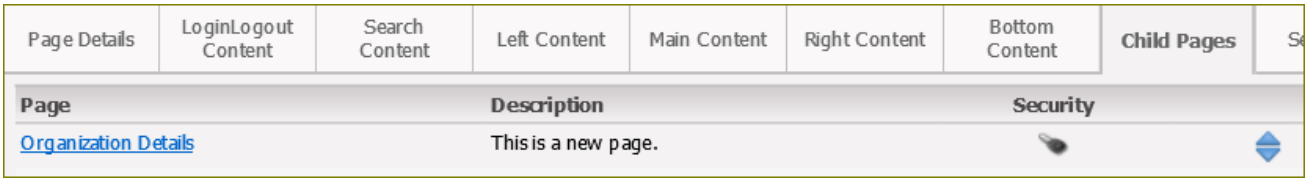
2. Select Home (Portal 1).



3. From the **Administration** menu, click the **Organization** option located under the CONFIGURE heading.

4. Select the **Child Pages** tab.

5. Add a new page label Organization Details. This page should not be visible in the navigation. (Once all new pages are added, we come back and make module-setting adjustments.)



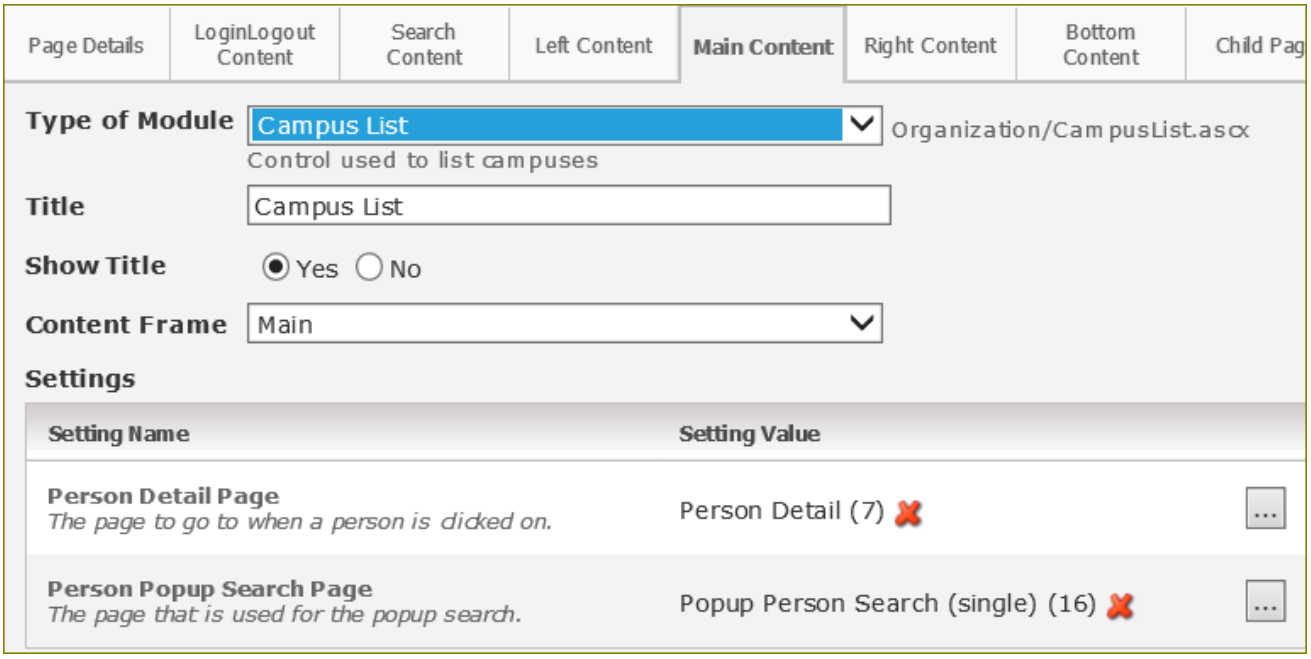
6. From the new **Organization Detail** page, select the **Child Pages** tab.

7. Add two more pages, one for Organization Settings and one for Campus. Mark both pages to not display in navigation.

Now we work back through the page tree and edit modules and modules settings for all new pages.

8. Select the **Main Content** tab of the **Campus** page.

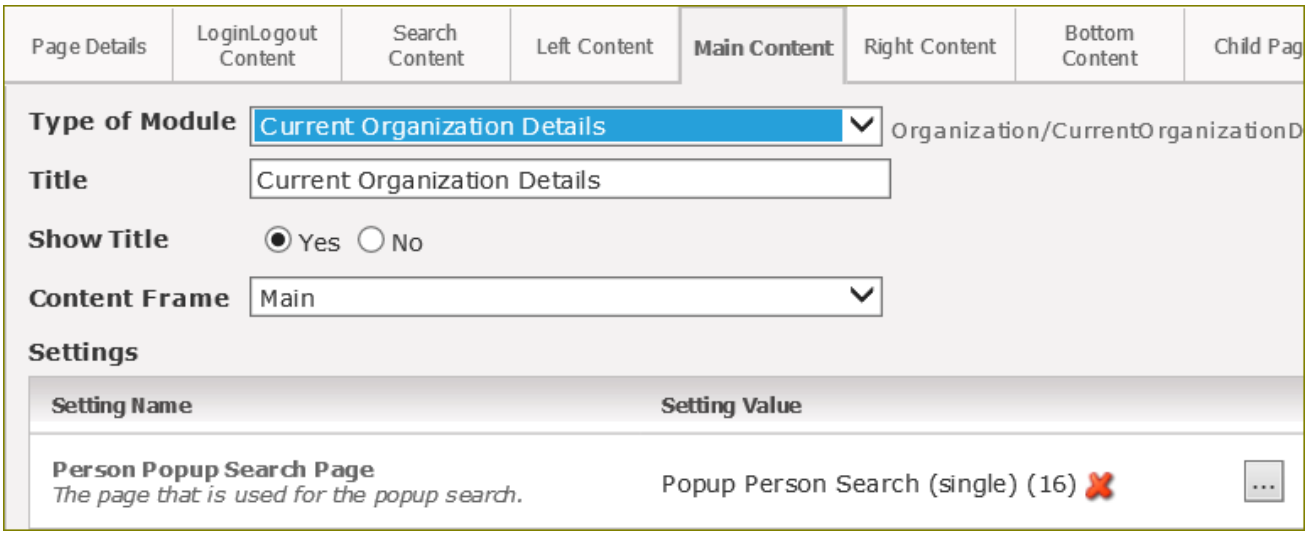
9. Change one of the inherited modules to the Campus List module. This module has two module settings to set. **Person Detail** page should be set to the **Person Detail** page (7) and **Person Popup Search** page should be set to the **Popup Person Search** (single) page (116).



9. Click the **Update** button.

10. Select the **Main Content** tab of the new **Organization Settings** page.

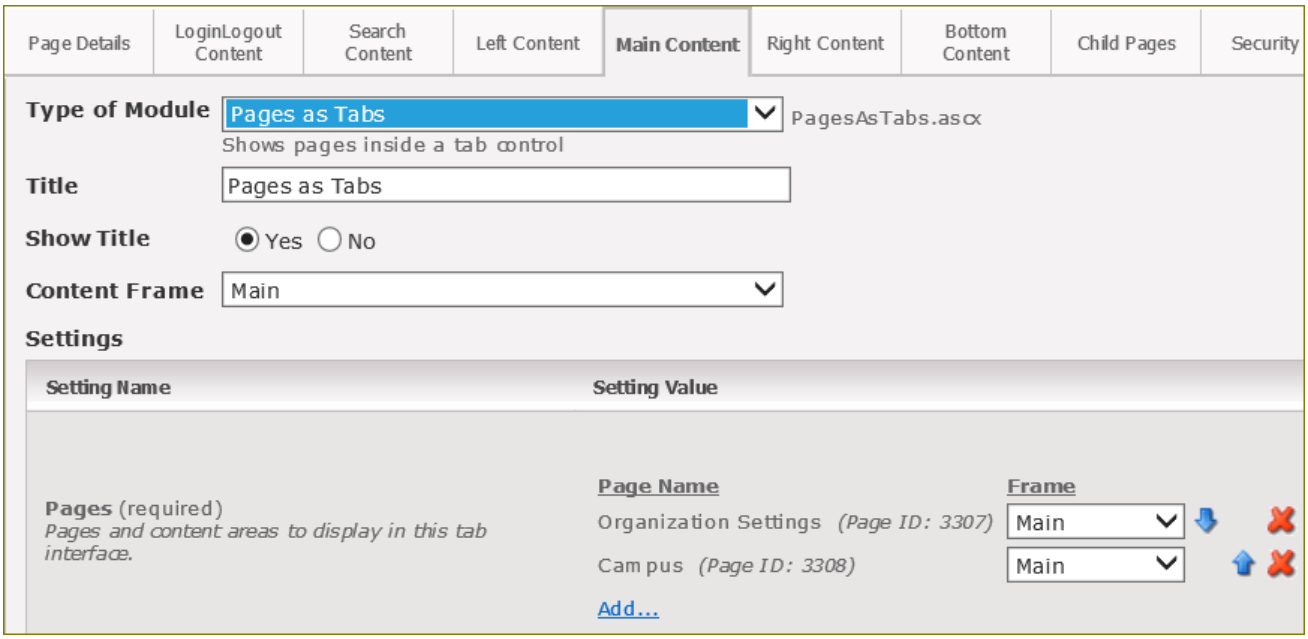
11. Change inherited modules to the Current Organization Details and Organization Setting List modules to this new page. The Current Organization Details modules have one setting, which should be set to the **Popup Person Search** (single) page (16). The Organization Setting List has no module settings.

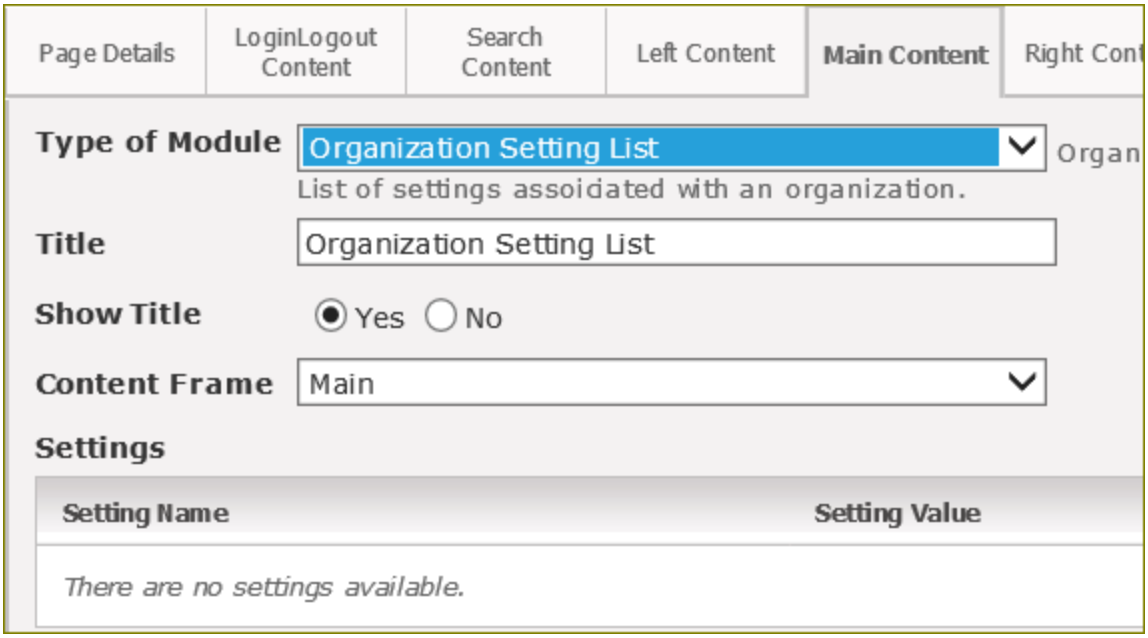


12. Go to the **Main Content** tab of the **Organization Details** page.

13. Replace any inherited module with the **Pages as Tabs** module. Delete any other modules from this page.

14. Add the new Organization Settings and Campus pages.

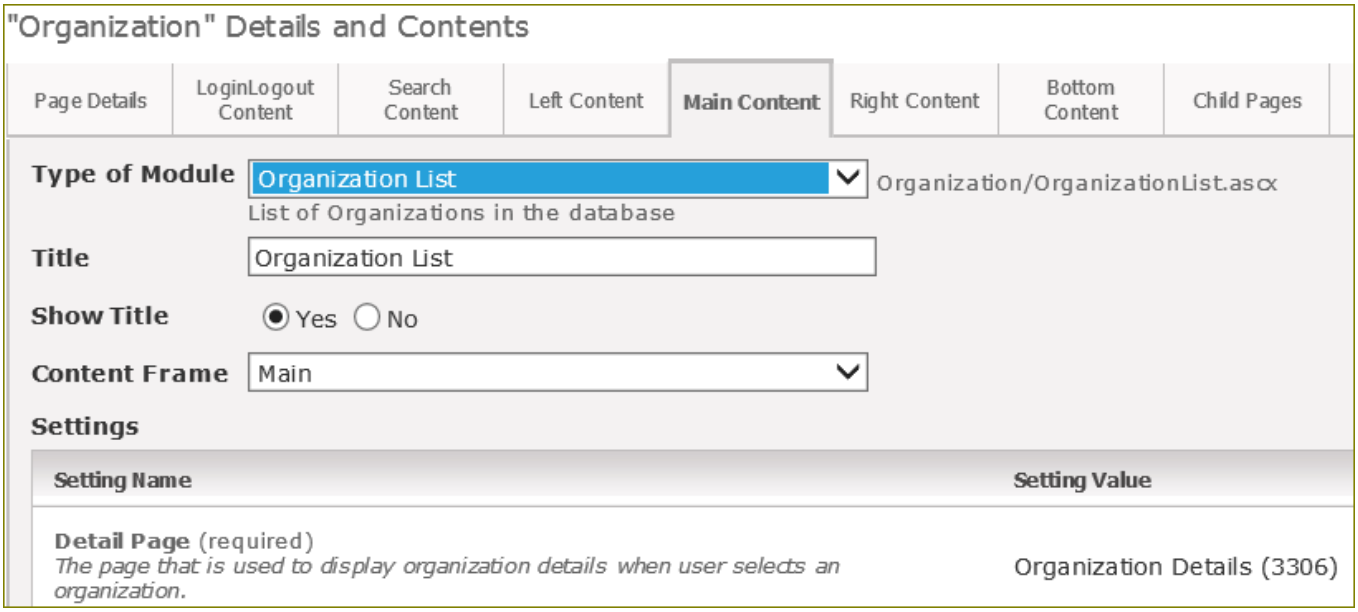




15. Click the **Update** button.

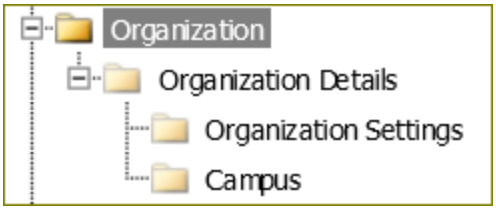
16. Select the **Main Content** tab of the **Organization** page.

17. Replace an existing module with the Organization List module. This module has one setting that should be set to the new **Organization Details** page. Page numbers will vary. This page should display in navigation.



18. Click the **Update** button.

19. Verify the page structure.



20. Refresh Cache.

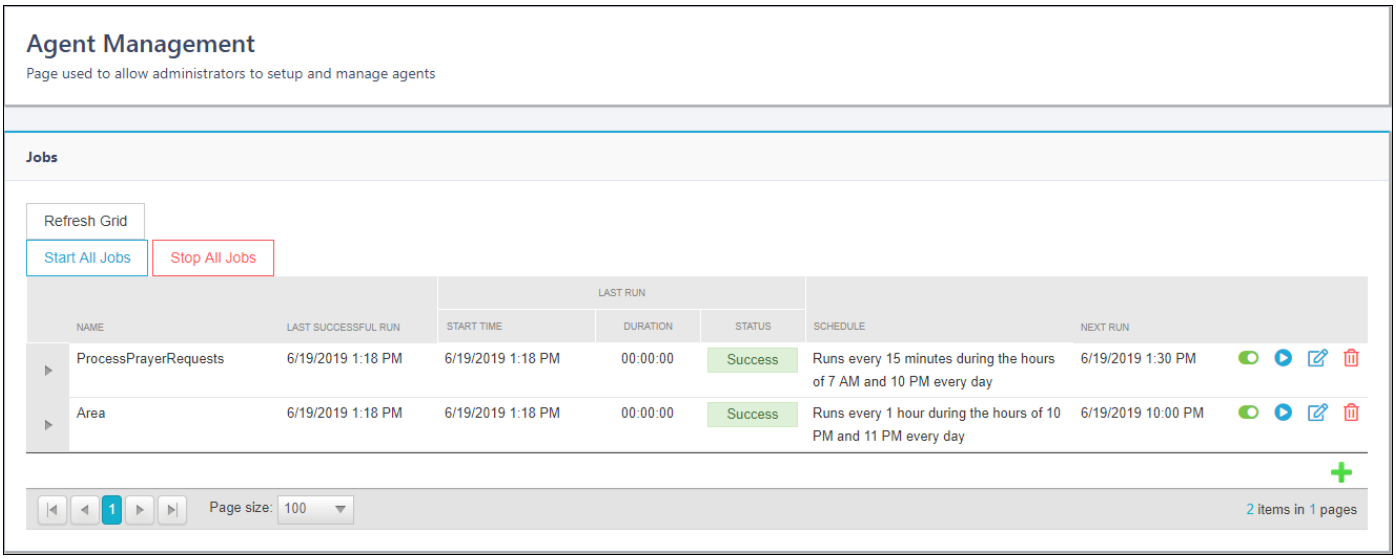
Agent Management

Agents are system actions that can be set to run automatically on a specific day(s), specific time(s) and a specific frequency. This can include sending notifications and/or processing information.

1. From the **Administration** menu, click **Agent Management** option located under the **ADMIN** heading. The following screen shows two agents that have been added.

NOTE: Each agent can be started or stopped at any time by clicking the switch icons. You

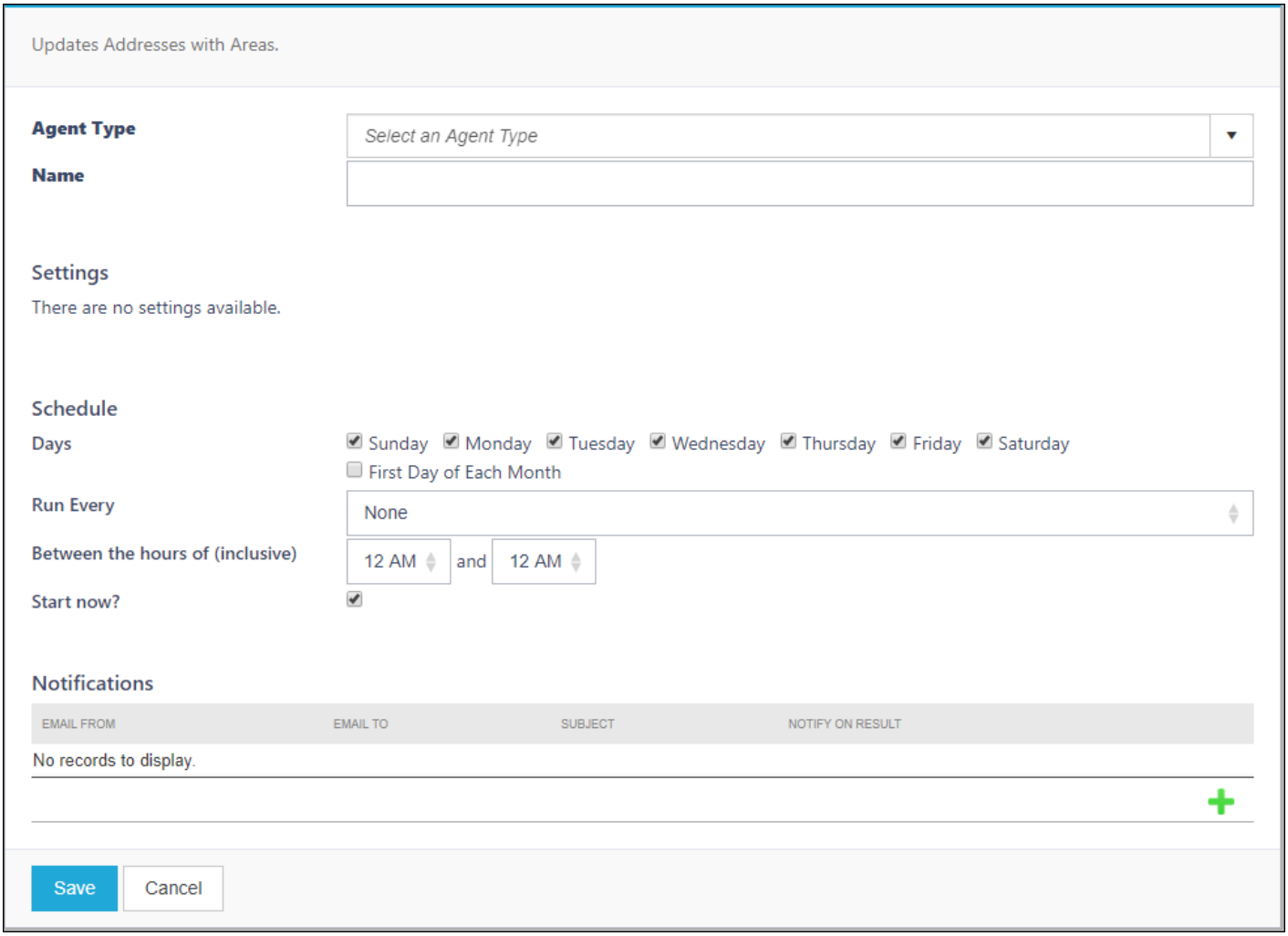
can also trigger an agent to be run by clicking the Run Now icon. Use the Collapse icon to display the Job History.



2. Click the icon to **Add a New Job**. This is where you add and configure an agent.

NOTE: The available fields vary depending on the agent selected.

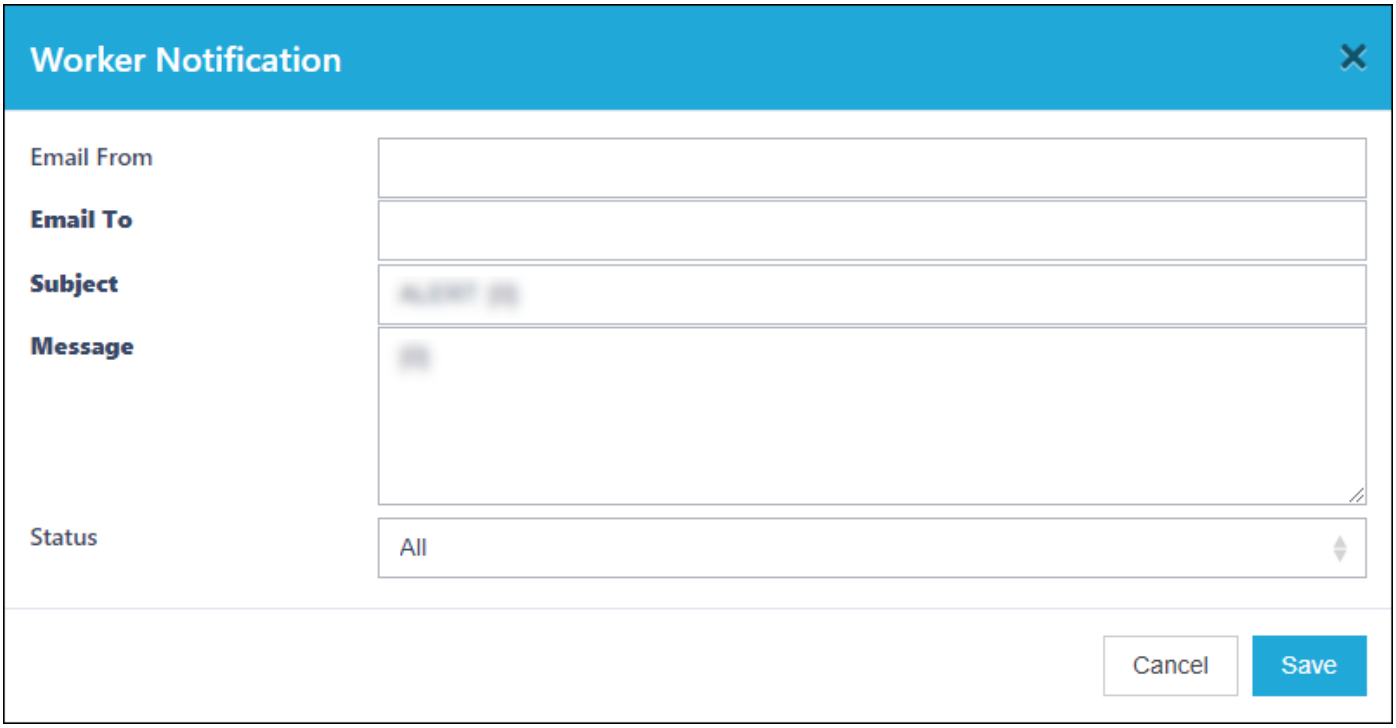
3. Select a **Agent Type** from the drop-down list. You can change the **Name** if desired.



4. Some Agents have additional settings available. Configure the agent settings as necessary.

5. Choose when and how often you would like the agent to be run. Most agents have a suggested schedule that automatically populates.

6. Click the icon to **Add a New Workers** to be notified.



7. Click **Save** when done.

Automation Agents

AD Sync (Active Directory) Sync – This agent synchronizes User passwords to the Active Directory (AD). If the Agent finds the same username in the Active Directory that is in the Arena database, the user's password changes in Arena to match the Active Directory password. The AD Configuration must be set under Administration in order for this Agent to function.

Area – This agent updates addresses with Areas.

Assignment Process State – This agent processes Assignment State Actions used with Assignment Workflow. In the case of sending emails, emails are sent to the first active email address of the recipient (requestor/worker). Also, be sure to customize all Assignment System Emails.

Background Checks – This agent processes background checks completed by the provider and triggers the respective email to owner, requestor or approver. Emails are sent to the recipient's first active email address. Also, be sure to customize Background Check System Emails.

Calculate Peers – This agent executes all peer network types.

Classified Cleanup – This agent removes classifieds older than the specified days in the Classified Expire Days Organization Setting.

Computer Audit – This agent searches the Domain the web server is part of for other computers. It is capable of listing all the computers on the Domain, along with hardware and software specifications about those computers. This agent is heavily dependent on specific hardware configurations.

Create Occurrences – This agent creates occurrences for use in Check-In.

Daily Email – This agent sends a daily email to specified recipients consisting of all records with birthdays today. This agent has several agent settings such as setting age range, displaying the age in the email, setting the recipients and the option to include a photo if one exists on the person's record. When the Recipient Tag setting is set to -1 in the Agent settings, Arena sends the email to all records marked as Staff. You can optionally create a (Ministry) Tag and enter the Tag ID in this setting to send the email to only records in this tag. You also need to customize the Daily Email System Email.

Email Clean – This agent cleans up bad email accounts. It watches a specific POP3 email account looking for bounced messages. Email addresses are harvested from these messages and deleted from the Arena membership and newsletter subscription tables. Email addresses determined to be 'bad' are flagged inactive and noted with an appropriate reason. This agent has several settings you want to review and set accordingly.

- **MailServer** is the Host name of the mail server.
- **MailUsername** is the POP3 account login.
- **MailPassword** is the Password for the POP3 account.
- Set **DeleteAll** to true to tell the agent to delete all of the mail in this account. If this mail account is only used to process bounced mail it is a good idea to set this parameter to true. Default is false.
- Specify to run **ProcessTransient** or not. This agent is written to handle two types of bounced mail. The first type is called a Hard Bounce. This is the normal error for an old or incorrect email address. The second is called a Transient Bounce. This error type says that an MX record exists for the recipient's email address, but the server has not been up for 2 days. It is up to you whether you wish to delete these addresses from your database. Though it is very rare, occasionally an email server will be down for 2 days, but usually only at a small business or personal server. Set this parameter to true if you wish to delete Transient addresses from your database. Default is false.
- Set the **MessageBatchSize** to the maximum number of messages to be processed during a single interval of running. It is useful to throttle the impact this agent has on the mail

server. It is also useful if you are expecting a large number of messages to be in the account. The more messages there are to process the more memory used on the system that is running the agent. Default size is 300.

- Set **EnableLogging**, which should only be enabled if tracing an issue as the logs can get quite long. If set to true, logs are written to the install directory in a file named ArenaEmailClean_.log. Default is false.
- Set the **Aggressive** parameter to how aggressive the agent will be when processing bounced messages. Some ISP bounce messages are generic and can lead to false bounces if the email had multiple addresses. Setting the Aggressive flag to 'true' processes all bounced emails while 'false' processes only emails with a single address in the to and cc fields combined. Default is false.
- If you have an Exchange server, complete the following steps for use with this Agent:
- Setup a user account with the Exchange email box to collect NDR (i.e. bounced messages);
- Allow POP3 access to the server from the Server that's running the Arena Agents;
- Setup Exchange to CC all NDRs to the account above;
- Setup the ArenaEmailClean agent - this scrapes the email addresses from the NDRs and deactivate them in Arena.

Emails Contribution Stmt – This agent sends statements by email where records are marked email statements. In order for email statements to be marked, the individual record must have a valid email address and a PIN number.

Event Email – This agent sends all pending event emails, including reminders. The Owner Notification email is sent to the first active email address of the Event Tag Owner. The Event Registration emails are sent to the registrant email that is collected at time of registration. Be sure to customize Event System Emails and email for each Event Tag.

Historical Contributions – This agent processes historical payments.

KeepSSRAlive - This agent keeps the SQL Reporting Services active, reducing load times of reports.

Mail Queue – This agent sends all pending emails from the communication object.

Mission Trip Deadline Reminder – This agent sends an email to the mission team member to remind them of the registration deadline, if registration is not complete.

Mission Trip Registration Deposit Reminder – This agent sends an email to the mission team member to remind them of the deposit.

Newsletter Send – This agent sends the specified newsletter to people subscribed to that newsletter.

PBX Cdr – This agent works when integrating Arena with an Astericks Phone System.

PBX Peers – This agent works when integrating Arena with an Astericks Phone System.

PBX Voicemail – This agent works when integrating Arena with an Astericks Phone System and sends an email to the first active email of the designated Person Detail UL.

Process Critical Serving – This agent sends the respective Serving Tag owner an email communication when a serving tag registrant meets the following specific criteria: The value of the status lookup is 'No Contact'. The status lookup has an Include as Critical value of "y" AND they were last modified more than [Critical Profile Days Organization Setting] days ago. Additionally, they are marked as critical if the value of the status lookup is 'No Contact' and last modified more than [Critical Profile Days Organization Setting] days ago. You can also customize the Tag Member Status Lookup to include other statuses as critical by adding “y” to include as Tag Member Status Lookup Critical indicator. **Note**: it has to be "y", not "1", not "true", etc.

Process Health Meter – This agent processes the health meter for everyone in the database.

Process Metrics – This agent processes metrics based on their setup criteria.

Process Prayer Requests – This agent processes the prayer requests and sends the appropriate emails. Customize all Prayer System Emails.

ProcessPOP3 Account – This agent processes emails in a specific POP3 account to create the communication in Arena.

Send Birthday Emails - This agent sends an email to any person in the database that has a birthday on this day. A complete birthday in **MMDDYYYY** format and active email address is required. You also need to customize the Birthday System Email.

Serving Reminder – This agent sends an email reminder to the first active email address of members of designated serving tags within a defined period of time prior to next time of service. This should be run once a day. Customize the Serving Reminder System Email.

Small Group Registrations – Sends all pending emails from small group registrations to all active email addresses of Group Leaders. Customize the Group Leader Registration and Group Member Registration emails.

Subscribed Announcements – This agent sends users any promotion information to which they have subscribed to or any communications designated for the announcement email.

Sync Roles – This agent synchronizes people in a profile attached to a role. When you add records to the profile, they get the security role automatically attached to that profile.

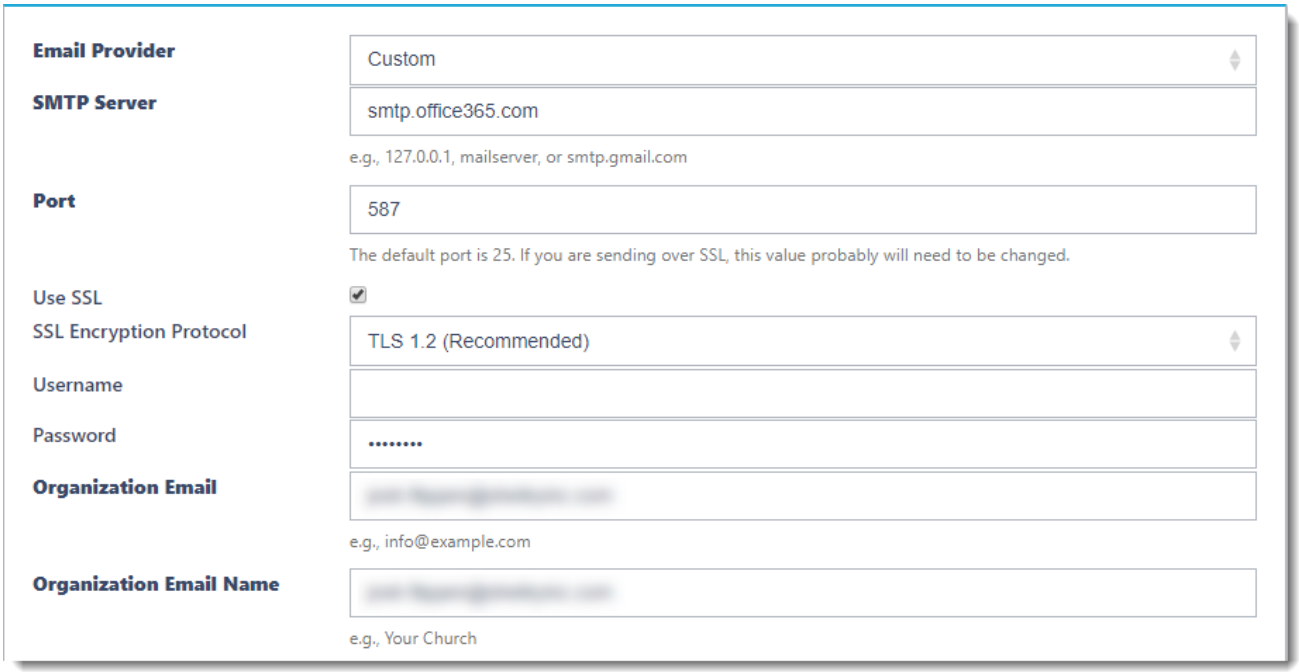
Transaction Settlement – This agent is designed to provide additional information that falls within the specified time frame.

Update Resource Events – This agent updates Event Tags that use an external event/resource

management application.

Email Configuration

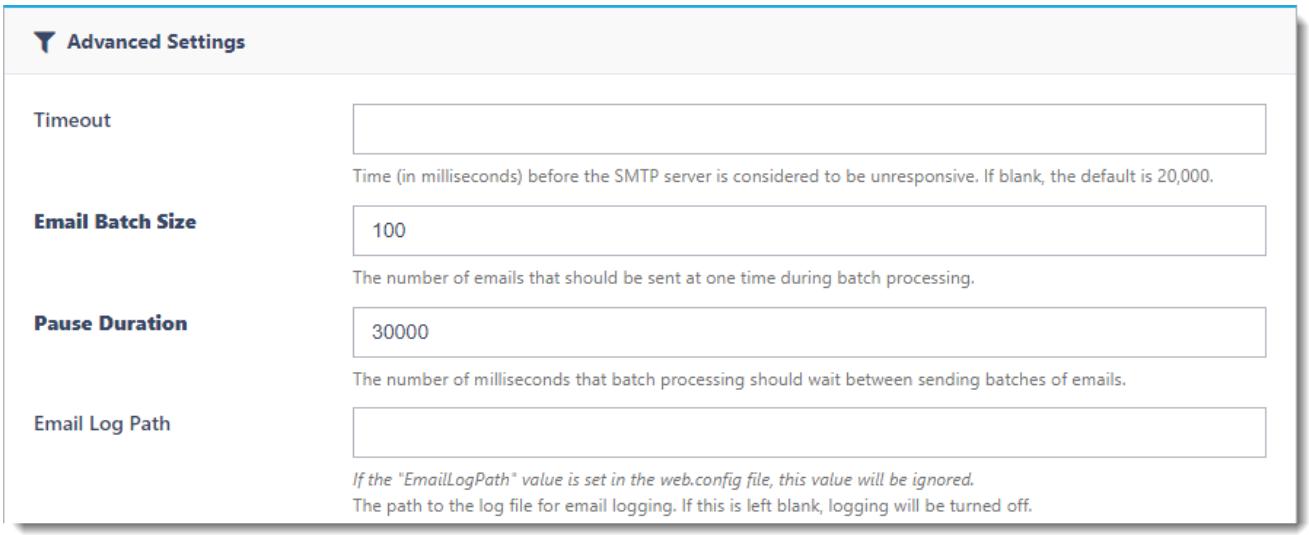
Use this page for general email configuration or optionally on the **Organization Settings** page. It is generally advised to consider the volume of emails generated by members of your staff and adjust email batch size and pause duration as needed.



- **Email Provider** - Select a predefined email provider.
- **SMTP Server** – Enter the email server for your organization (e.g., Microsoft Exchange, Gmail, etc.).
- **Port** – Set the port. The default portal is 25. If you are sending over SSL, you need to change this value.
- **Timeout** – Enter the time (in milliseconds) before the SMTP server is to be unresponsive. If left blank, the default is 20,000.
- **Use SSL** – Specify if using Secure Sockets Layer.
- **SSL Log Path** – Enter the path to the log file for SSL logging. If left blank, SSL logging is off.
- **Email Batch Size** – Enter the number of emails to send per batch for processing.

- **Pause Duration** – Enter the number (in milliseconds) to pause between email batches.
- **Username** – Enter the email server username.
- **Password** – Enter the email server password.
- **Email Log Path** – Enter the path to the log file for email logging. If left blank, logging is off. If the "EmailLogPath" value is set in the web.config file, Arena ignores this value.
- **Organization Email** – The default email address that your organization uses to send out messages.
- **Organization Email Name** – The default name which your organization uses to send out messages.

Advanced Settings:



- **Timeout** - Enter the time (in milliseconds) before the SMTP server is considerred to be unresponsive. If blank, the default is 20,000.
- **Email Batch Size** - Enter the number of emails that should be sent at one time during batch processing.
- **Pause Duration** - Enter the number of milliseconds that batch processing should wait between sending batches of emails.
- **Email Log Path** - Enter the email log path. If the "EmailLogPath" value is set in the web.config file, this value will be ignored. If the is left blank, logging will be turned off.
- **Email Header** – Customize the header to be used for Classified Requests, Prayer Requests and eCards.
- **Email Footer** – Customize the footer to be used for Classified Requests, Prayer Requests and eCards.

Click **Update** to save.

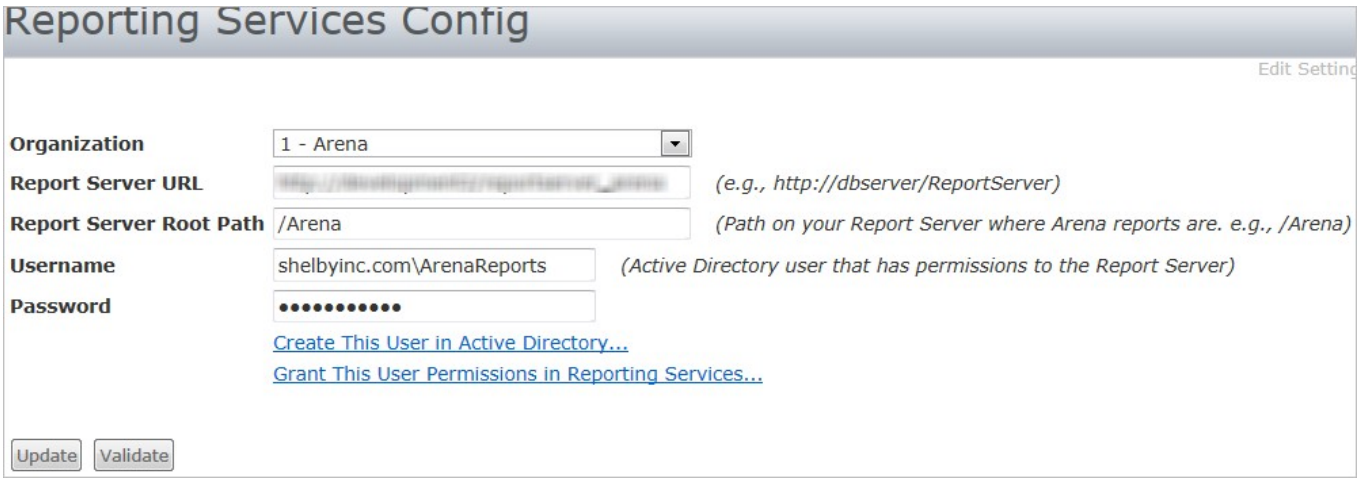
Click **Test Email** to test the SMPT setting.

System Emails

System Emails are global emails sent based on the feature. Below is a list of system emails along with a brief description. In order to use system emails, you must complete and save the required fields and start Agents where applicable.

System Email	Description
Advanced HTML	Sends email to the specified recipient when the Advanced HTML module is changed.
Agent | Birthday	Sends daily email to all active records with a complete birthday in **MMDDYYYY** format on the current day, with an active email address and who are the minimum age specified in the Send Birthday Email Agent.
Agent | Contribution Statement Email	Sends email with the contribution statement attached to all records with an active email address, PIN number and email statement is marked.
Agent | Daily Email	Sends a list of all birthdays for the current day to all records marked "staff" or to a specified tag. Consider adding the ##BirthdayDetail## and ##ServingTagDetail## merge fields.
Agent | Group Leader Registration	Sends email to the group leader when someone registers for the group to which the recipient is the Group Leader.
Agent | Group Member Registration	Sends email to the registrants of a group.
Agent | Mailing(CASS/Move)	Sends email when the Cass/Move agent runs.

connection is required in order for any Arena Reports to load properly.



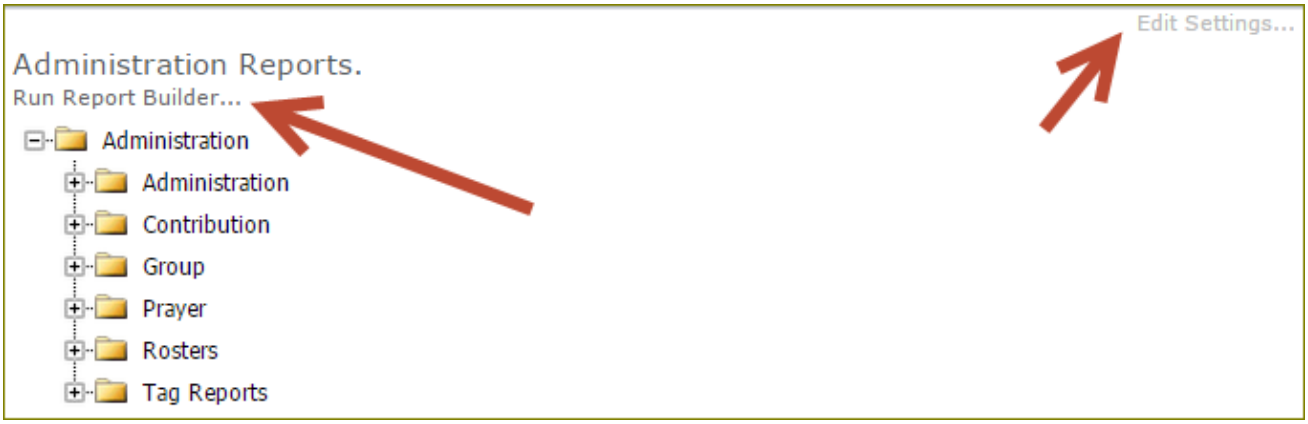
Reports

The **Administration Reports** page has identical functionality as other Reports pages in Arena. The intention of this page is reports for Arena Administrators only. However, for all other Arena reports you sometimes want to make minor adjustments to default reports. You can make many of these adjustments directly from the report page. If you would like to retain the original report "as is", you have the option to save the report in the same folder but with a different name.

Editing Reports in Report Builder

Any page where reports are available, users with permission can use the Report Builder to edit the existing reports.

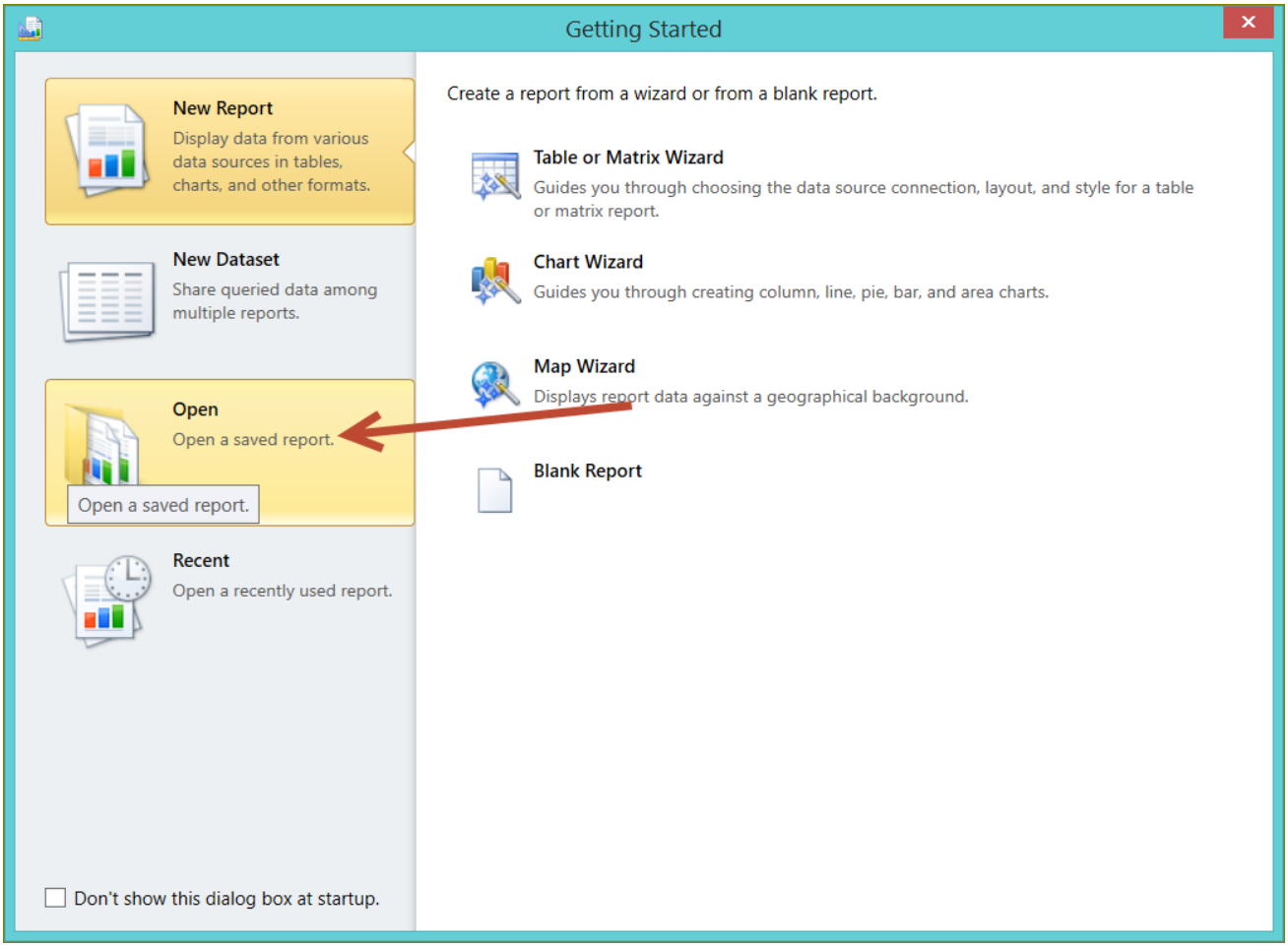
1. Click the ***Edit Settings*** link on the report page and set the Show Report Builder module setting to true. Permission to Report Builder is required.



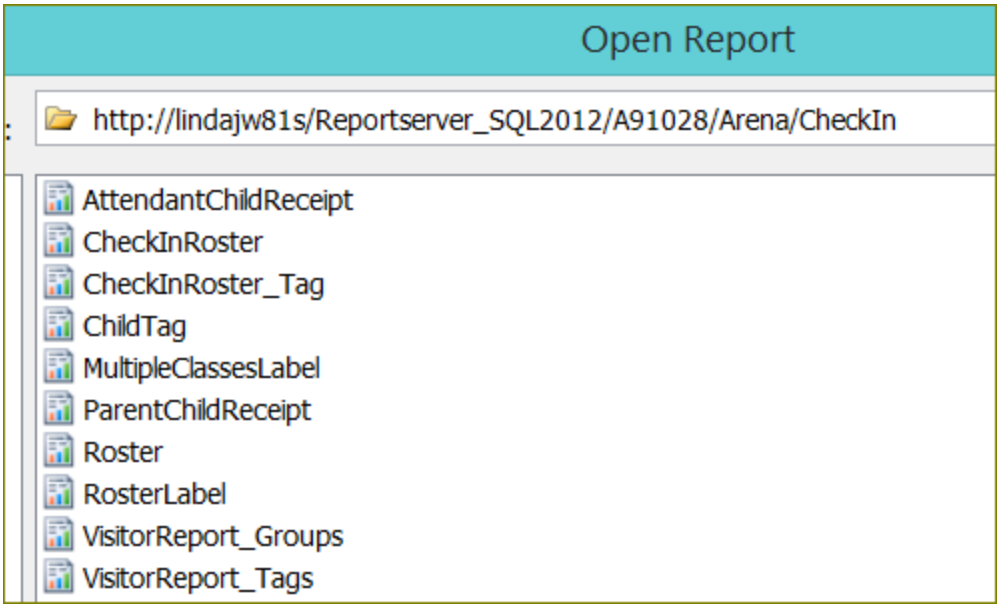
2. Click the ***Run Report Builder*** link.

3. If this is the first time to access, click the **Run** button in the pop-up window to launch Report Builder.

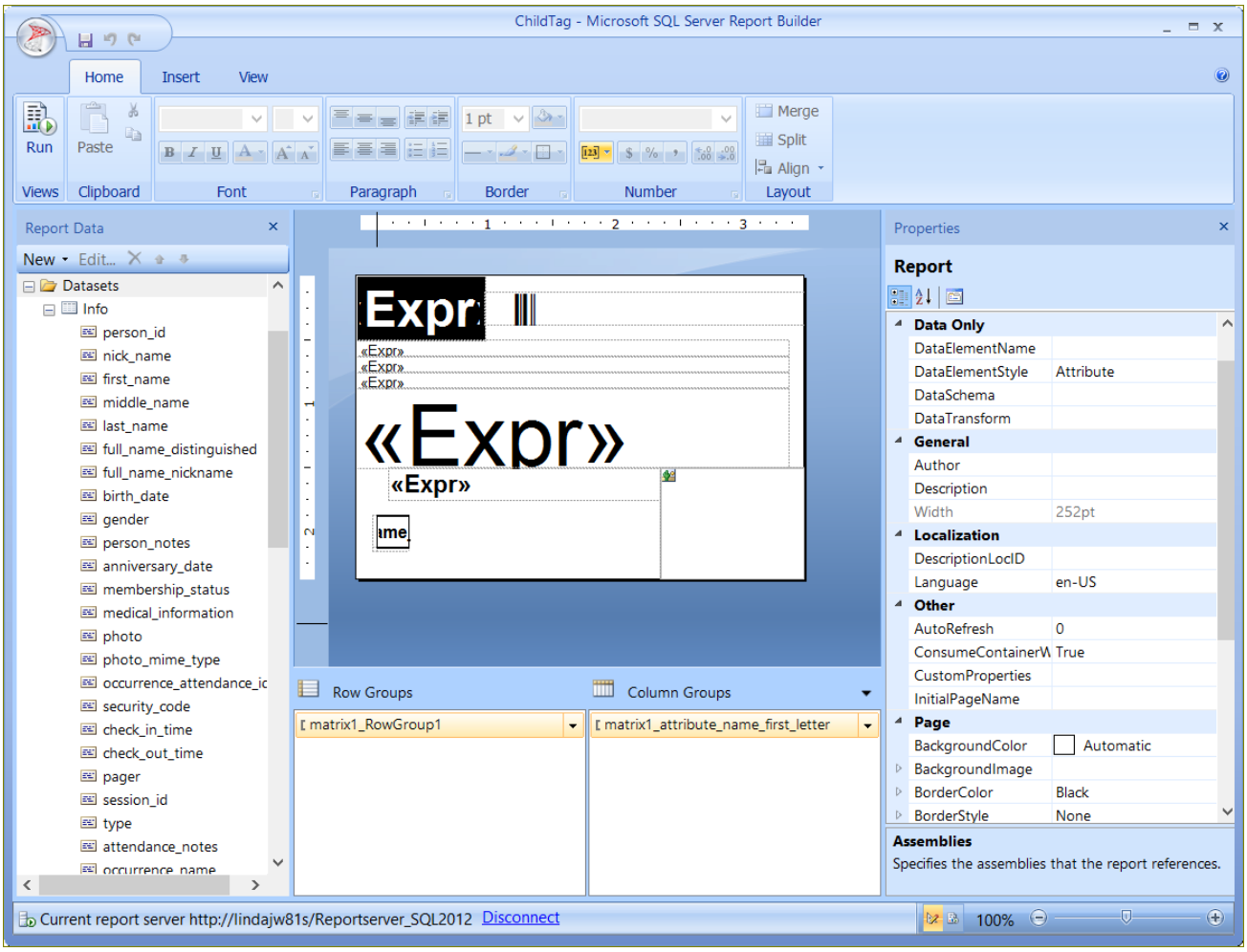
4. Select **Open** to open an existing report.



5. From the dialog box, select the folder and double-click the **Report** you want to edit. In this example, we use a check-in label.



6. Make the adjustments desired.



Use the **Properties** window to adjust a page size or select a field to adjust field properties.

You can add any available dataset field from the Report Data window on the left or remove a field from the report design view.

7. Click the **Save As** button to save the report with a different name in the same folder, while preserving the original report.

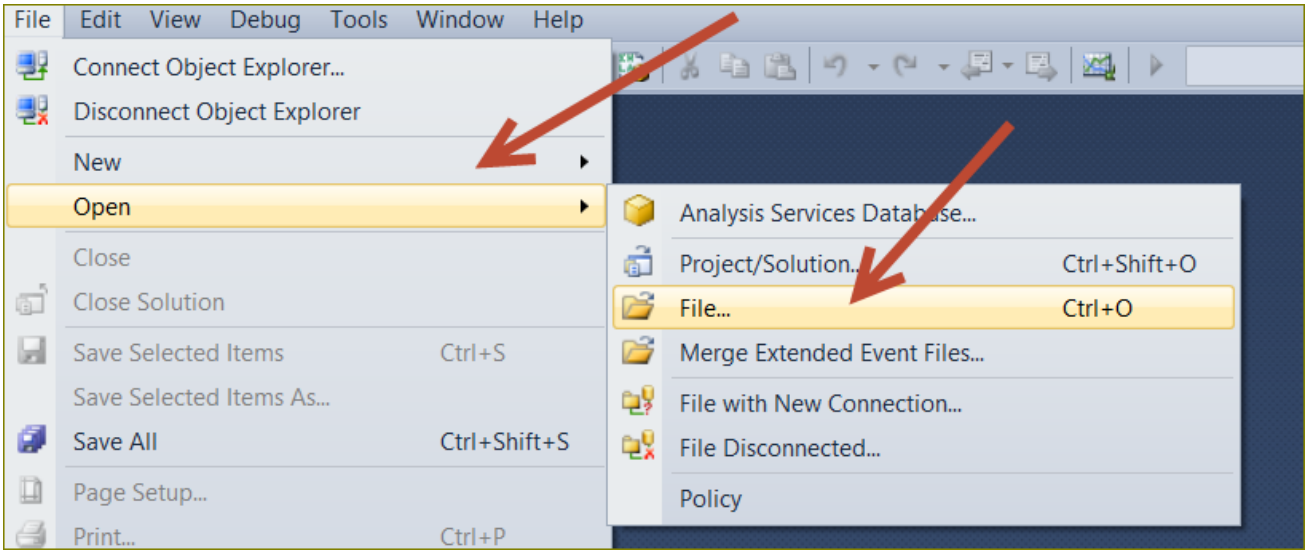
Report Manager

As you customize Arena to fit the needs of your organization, you can add new reports or reports you either create from scratch or download from the Shelby Arena Community. The RDL (Report Definition Language) file can be easily uploaded, via Report Manager, to your Arena. Keep in mind some report zip files from the Arena Community may also contain a SQL file. In this case, you first need to successfully run the SQL file prior to uploading the RDL file. (You need permission to access the SQL Server and Report Manager to perform the following tasks if the report you want to upload has both a SQL and RDL file. If the report does not include a SQL file, skip to Uploading a RDL File steps.)

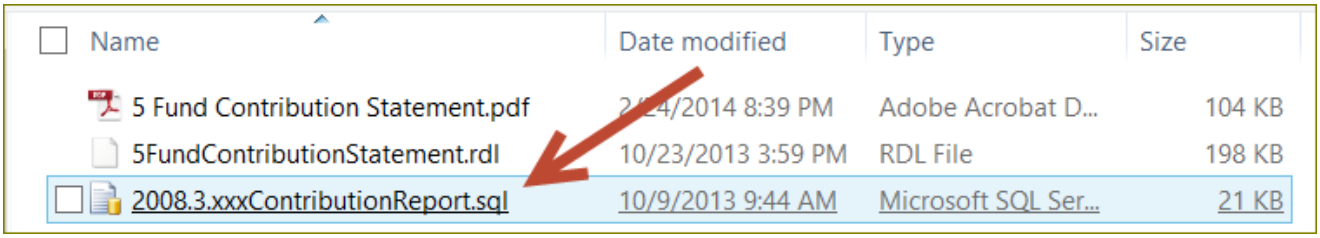
Running the SQL File

To run the SQL file, you can either open **SQL Management Studio** first or select the SQL File as long as you are running from the SQL Server.

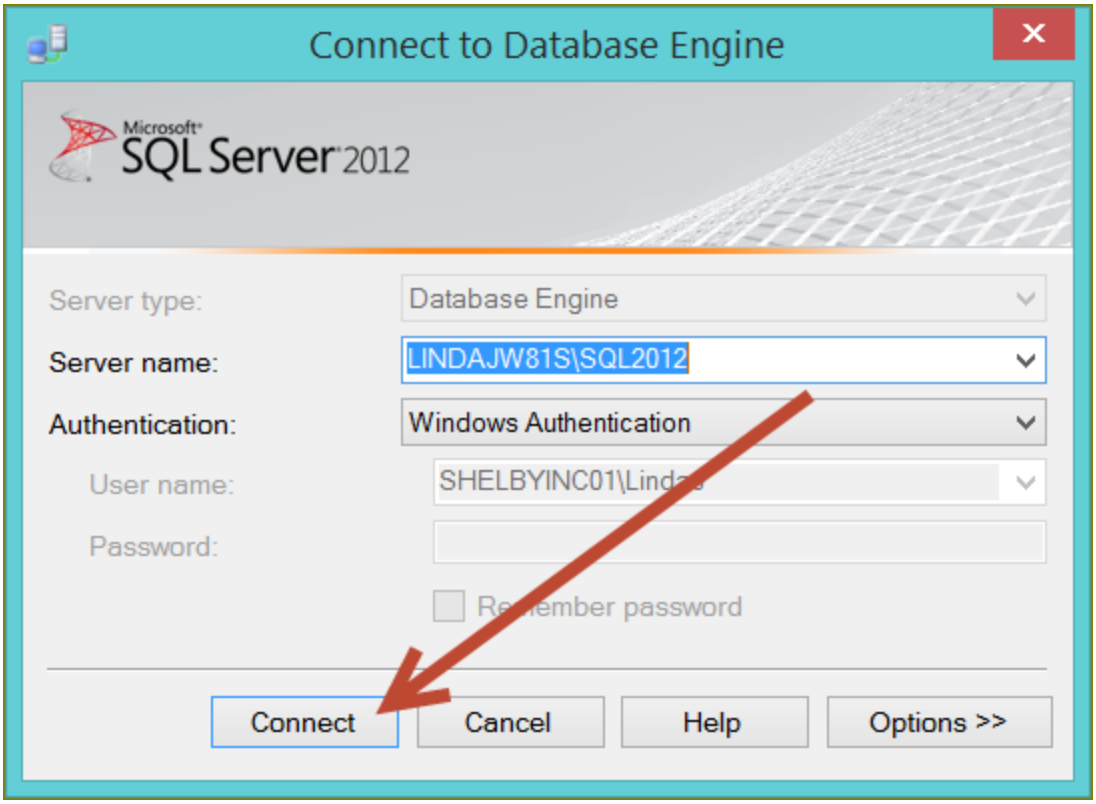
From the SQL Server



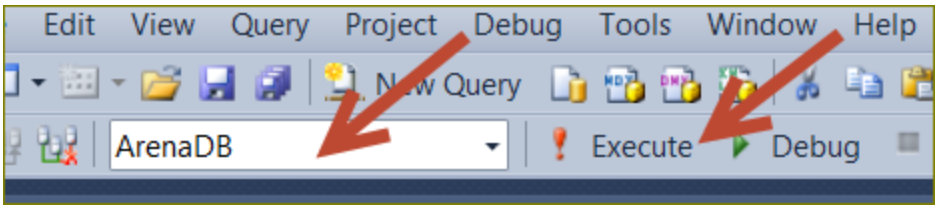
Opening the SQL File



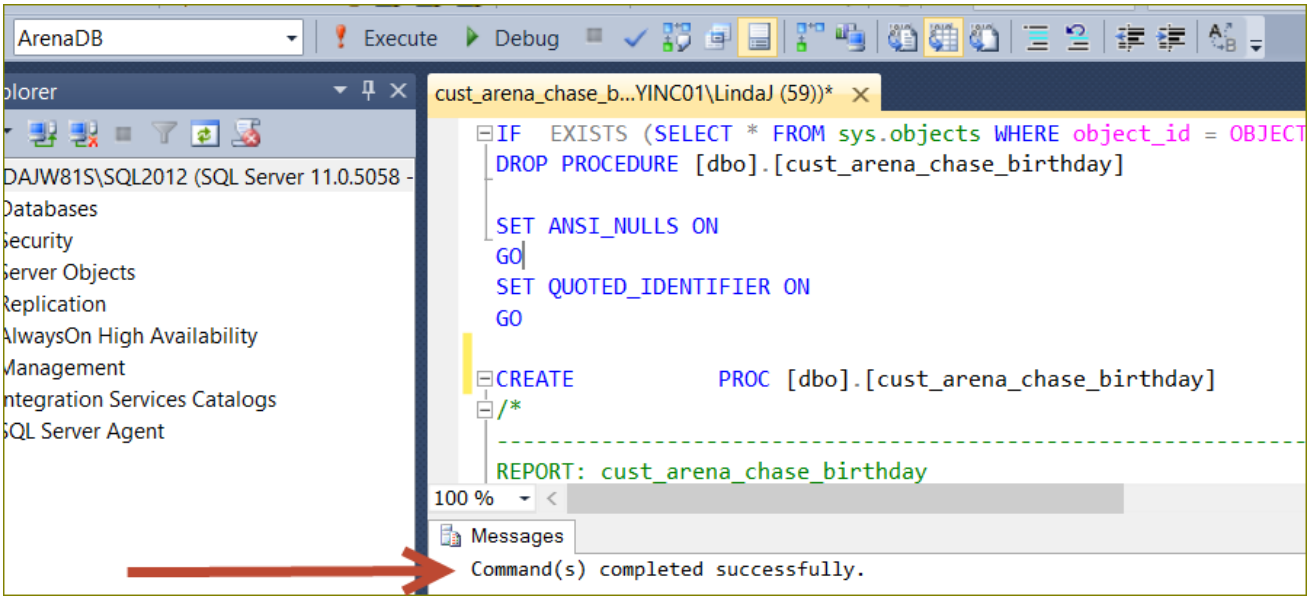
1. Select the applicable **Server Name** and click the **Connect** button.



2. Once connection is made to the SQL Server, select **ArenaDB** from the database drop-down.



3. Verify the statement ran successfully.



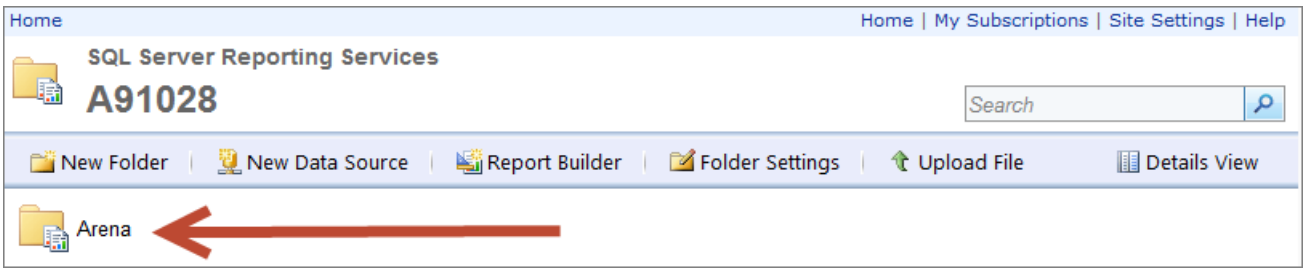
4. Proceed with RDL file upload.

Uploading the RDL File

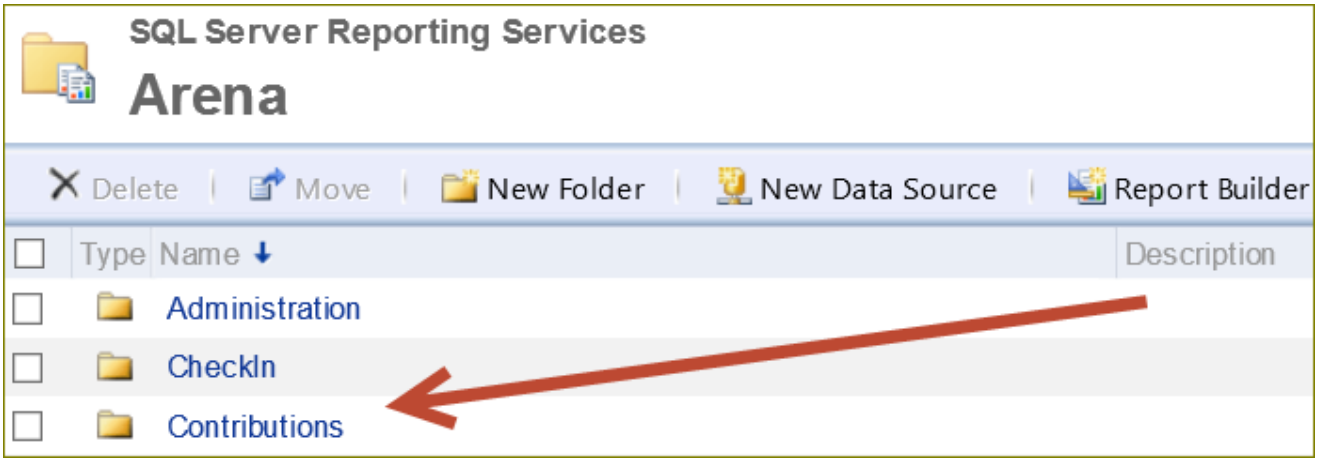
The report URL should be the **Report Server URL Organization Setting**.

1. Go to **Arena Report Manager** (e.g., http://<server>/Reportserver_SQL2012).

2. Select the **Arena Reports** folder.

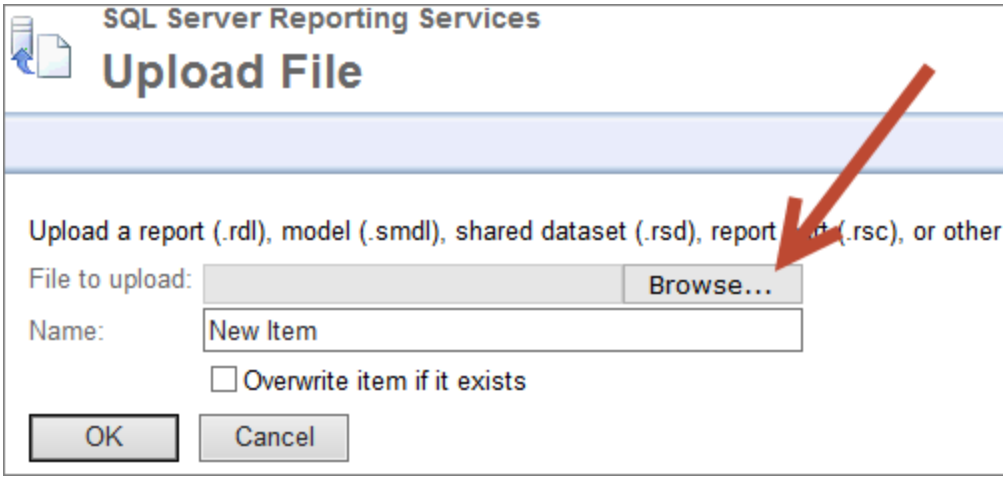


3. Select the folder to which you want to add the report. Be sure the folder you select is a folder available in Arena. We select the contributions folder in this example.

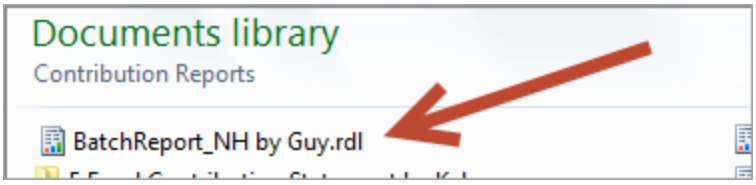


4. Click the **Upload File** button from the toolbar.

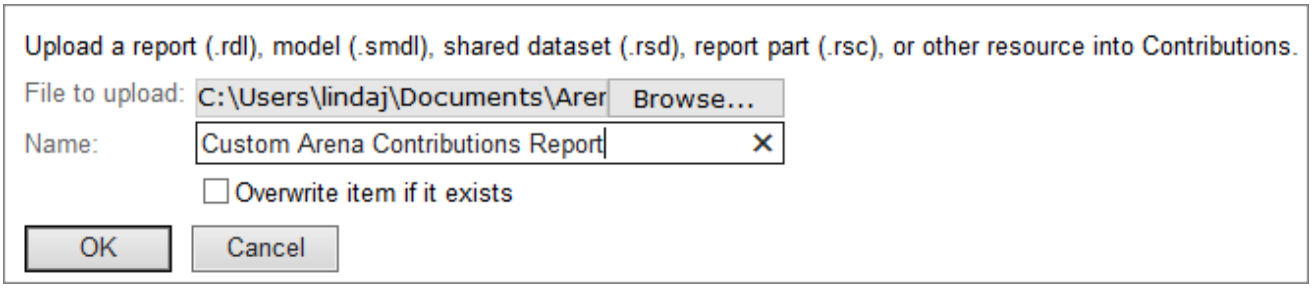
5. Click the **Browse** button to select the RDL file to upload.



6. Select the **RDL** file to upload.

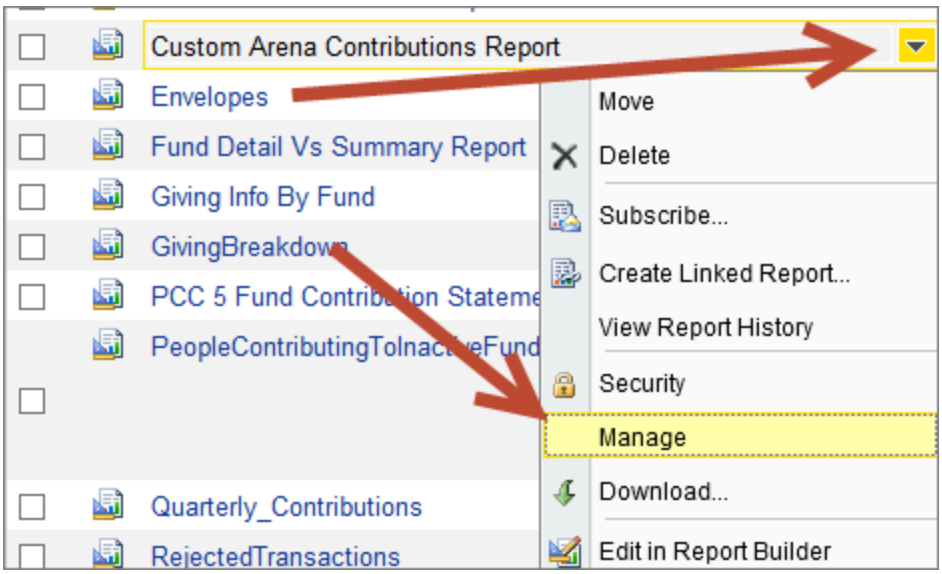


7. Customize the name, if desired. Consider adding a unique identifier to the name to differentiate the custom report from core reports.

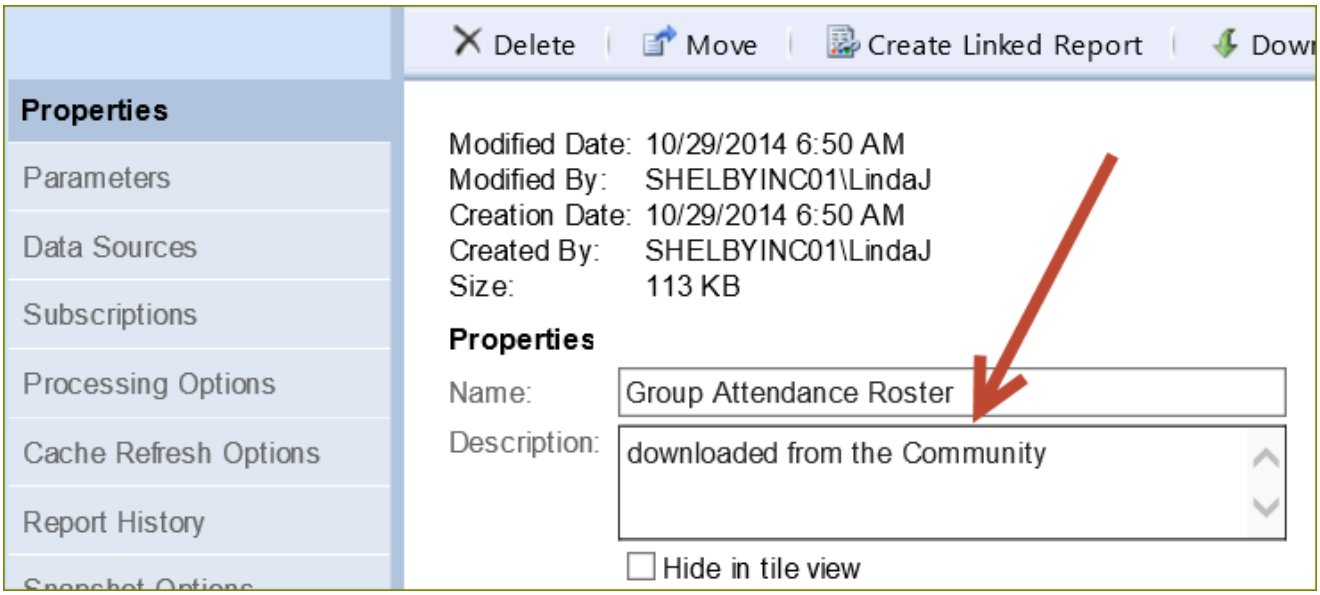


8. Click the **OK** button.

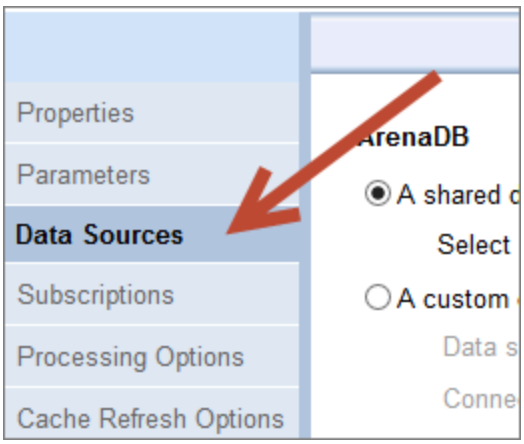
9. Click the **Manage** option from the report drop-down list.



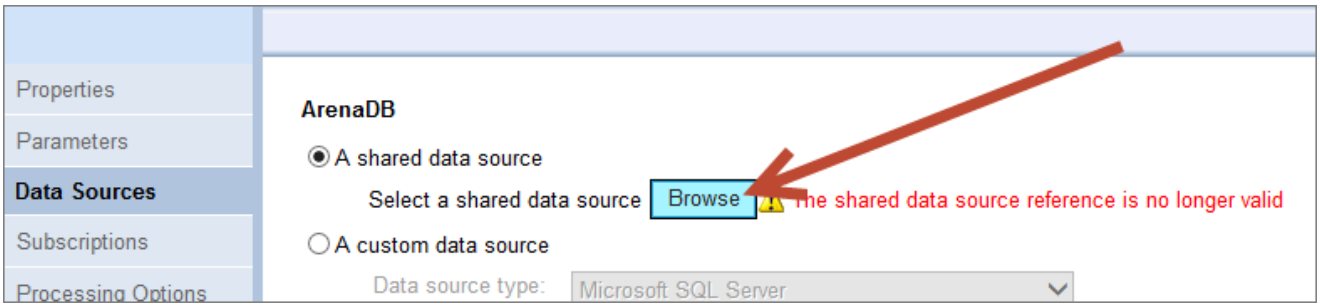
10. From the **Properties** page, you can edit the name of the report and add a description for the report. For non-core (provided by Shelby Systems), you might consider adding comments about the origination of the report and possibly the Arena version it was written on.



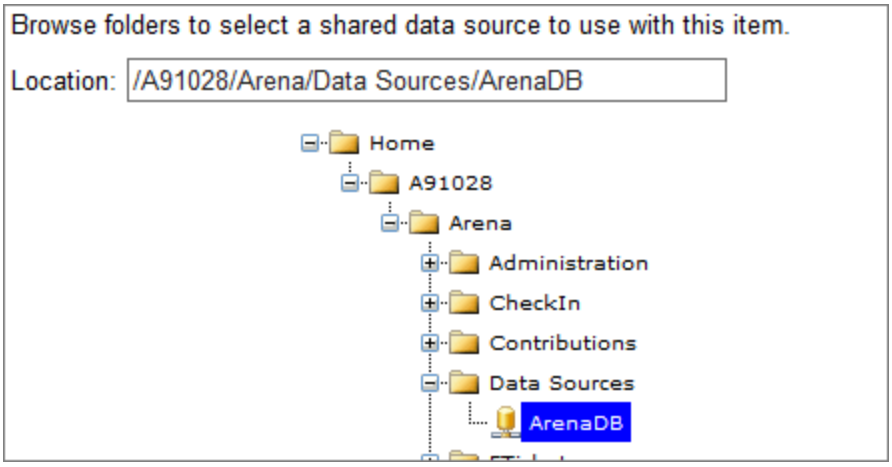
11. Select the **Data Sources** option from the **Management** page.



12. Click the **Browse** button to locate and select the Arena DB.

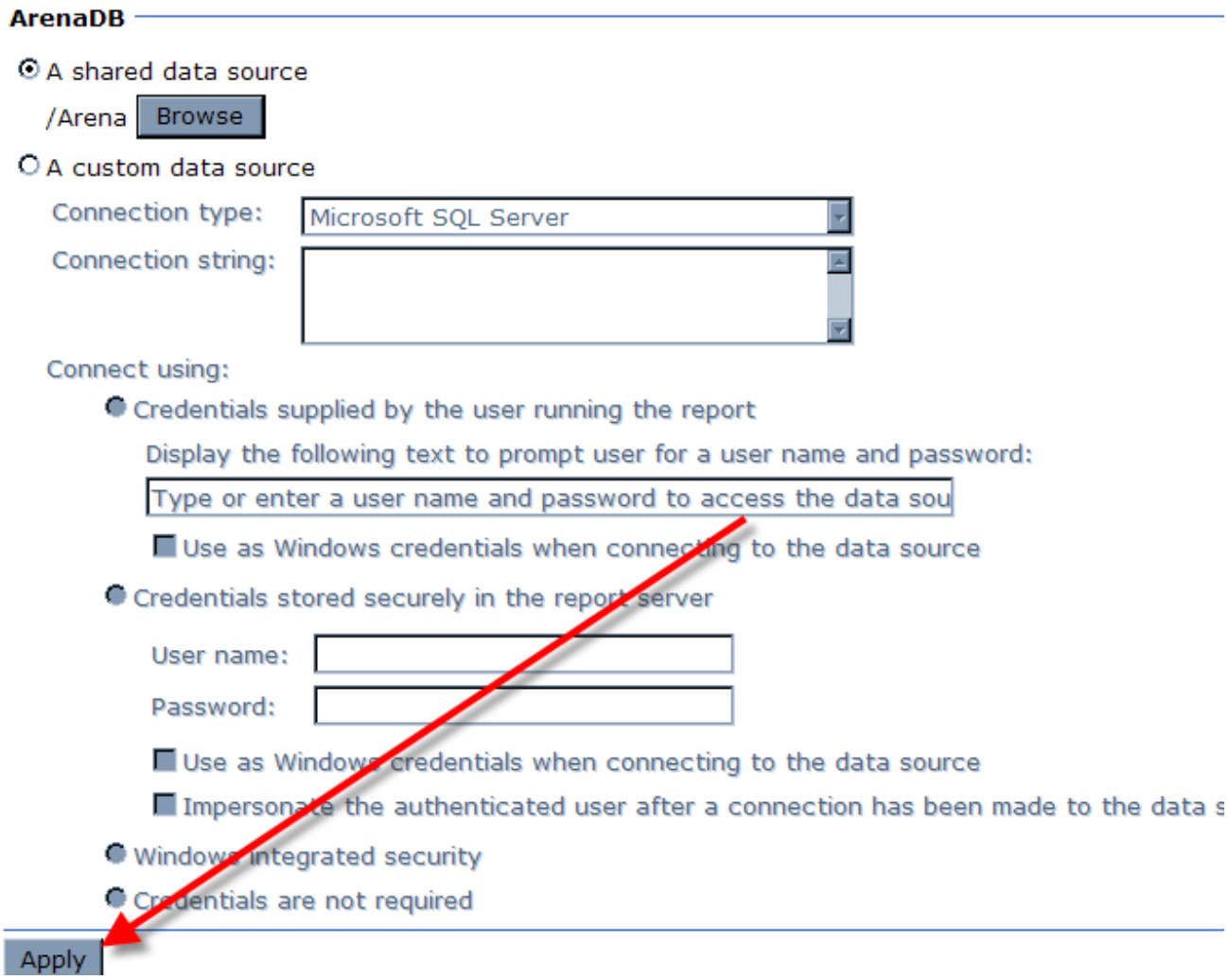


13. Expand the folder tree to display **Data Sources** and select **Arena DB**.

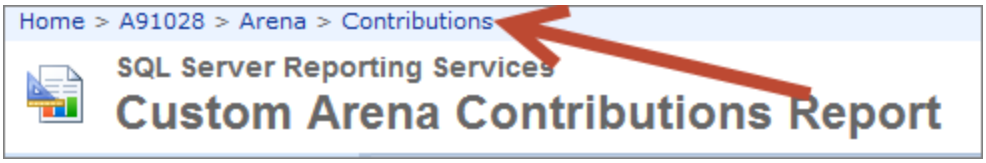


14. Click the **OK** button.

15. Click the **Apply** button.

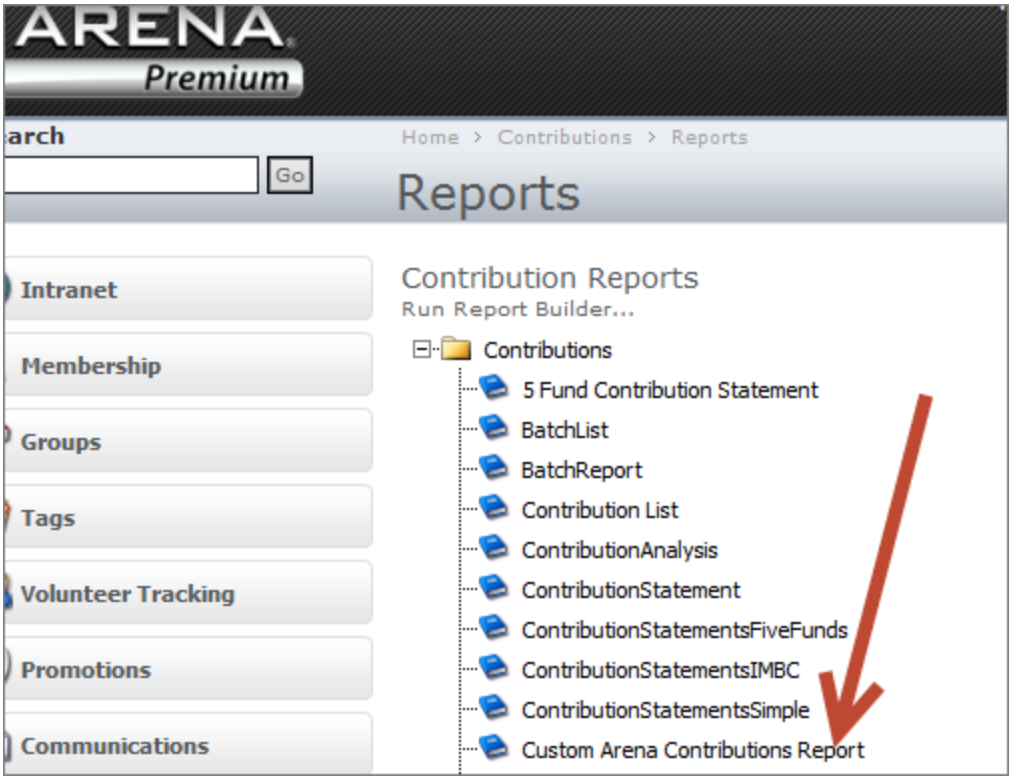


16. From the breadcrumb, select the folder to which you uploaded the report.



17. Select the report to verify it runs correctly.

18. The report is now available in Arena in the designated report folder.



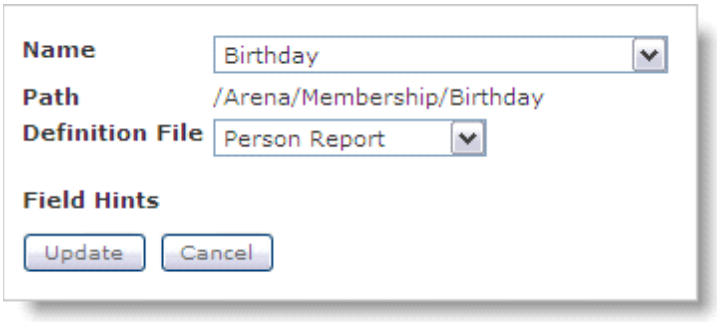
Report Registration

Report Registration connects a report from Reporting Services to specific List types. Before a report can be registered for use in Lists, it has to be created and in use by Reporting Services. (To view current registered reports, click on **Reports** in the appropriate section of Arena, or navigate to http://<reportservername>/Reports.)

Click on **Report Registration** to display a list of Reports currently registered within Arena for use with Lists. This list shows the Report Name, the Path, the Definition File name, and a **Delete** ✘ icon. For installations, there are no reports registered. Not all reports work with lists.

Add a New Registered Report

1. Click the **Add** button.



- **Name** – This drop-down list is all the reports that exist in Report Services.
- **Path** – This identifies the file path of the report.
- **Definition File** – This is the type of List.

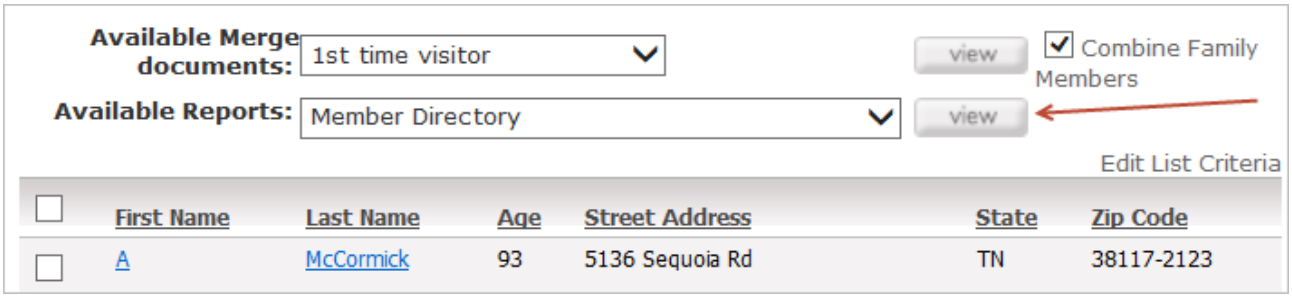
2. Select an existing Report from the **Name** drop-down list.

3. Select a **Definition File** from the drop-down list.

4. Click the **Update** button.

5. Set security on the **Report** pop-up module on the **Report Popup** page.

6. Now the report is available to merge with a List.

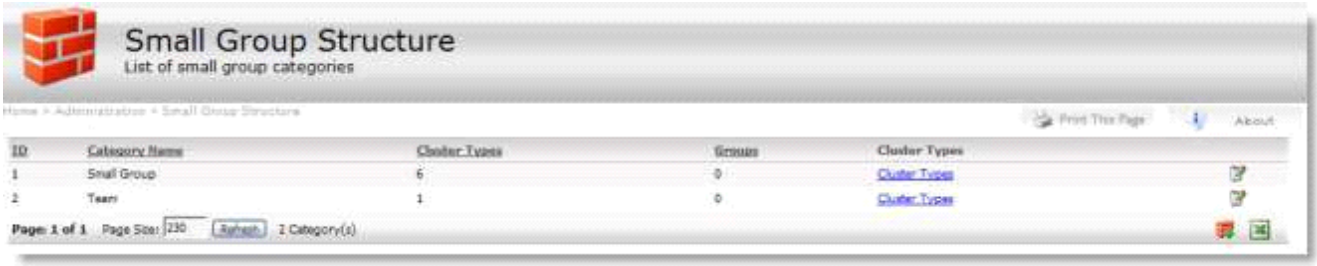


Small Group Structure

Small Group Structure determines the structure of Small Groups such as the number of levels a tree has between the highest level and the small groups. The number of Cluster Levels for each Cluster Type governs the depth of a group tree, the names of cluster level-tab captions for the Group Details, and separate group trees for viewing on different pages in Arena. A collection of cluster types and cluster levels make up a **Category**. You need to create at least one Cluster Type

before users can create a Group Tree. (The Category ID and Cluster Types are necessary for several module settings, which can specify which groups to display on a given page.)

By default, the two categories are Small Group (for Groups Trees) and Team (for Sports), as shown below.



- **ID** – This is the ID value for the Category that Arena automatically assigns.
- **Category Name** – This is the name of the category.
- **Cluster Types** – This number represents the number of cluster types within the category.
- **Groups** – This number represents the number of Small Groups.
- **Cluster Types** – Click the ***Cluster Type*** link to display all the Cluster Types in this category.

Edit a Small Group Category

1. Click the **Edit Category** icon to display the Category details.
2. Customize fields, as needed.

List of small group categories

General Information

Category ID	1
Name	Groups
Group Page ID	Group Details (2338)
Cluster Page ID	Main Campus Groups (2337)
Default Role	Member
Use Uniform Number?	○ Yes ◉ No
Use Area?	○ Yes ◉ No
Allow Bulk Updates?	◉ Yes ○ No
Private History?	○ Yes ◉ No
Credit as Small Group?	◉ Yes ○ No

Valid Roles

- ☐ **Prospective Lay Leader**
- ☐ **Coach**
- ☐ **Assistant Coach**
- ☑ **Leader**
- ☑ **Assistant Leader**
- ☐ **Team Manager**
- ☐ **Player**
- ☑ **Host**
- ☑ **Member**
- ☐ **Captain**
- ☑ **Prospective Host**
- ☑ **Prospective Leader**
- ☑ **Lay Leader**
- ☐ **Former Coach**
- ☐ **Former Assistant Coach**
- ☐ **Former Team Manager**
- ☐ **Former Player**
- ☐ **Student Leader**
- ☑ **Group Leader**

Update Cancel

Captions

Leader	Leader
Parent	Parent
Name	Group Name
Url	Group URL
Location Target	Location
Topic	Topic
Meeting Day	Meeting Day
Meeting Start Time	Meeting Start Time
Meeting End Time	Meeting End Time
Age Group	Age Range
Marital Preference	Marital Preference
Maximum Members	Maximum Members
Picture	Group Picture
Schedule	Schedule
Description	Description
Notes	Notes
Type	Test Type

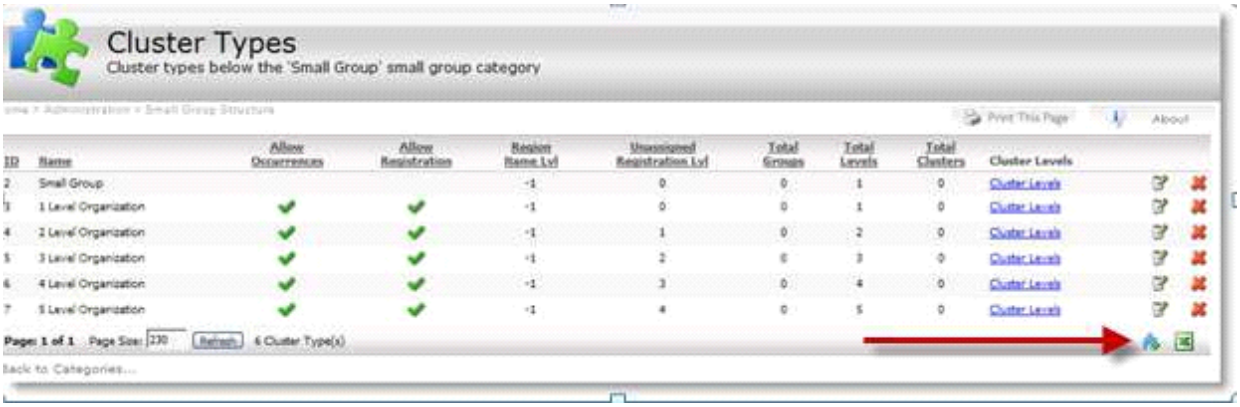
- **Name** – This is the name of the Category and the tab name for the Small Group level for all Cluster Types in this category. Arena automatically makes this word plural.
- **Group Page ID** – Click the **Search** icon to select the group details page.
- **Cluster Page ID** – Click the **Search** icon to select the cluster details page.

- **Default Role** – Click the drop-down list to select the default member role assigned to people when users add people directly to any group in this Category.
- **Use Uniform Number** – Select this box to use uniform numbers for group members within this Category such as for Sport groups.
- **Use Area** – Select this box to include an Area field to set the Area of a Group.
- **Allow Bulk Updates** – Select this box to allow users to Bulk Update from a **Groups** page.
- **Private History** – Select this box if the desire is not display group information in the History section of the **Person Details** page. If you select this box, the group history displays on the group leader's history information.
- **Credit as Small Group** – Select this box if all groups in this category should display in Map Area Statistics.
- **Valid Roles** – Select the valid roles for all groups in this category, determined by the Small Group Roles Lookup.
- **Captions** – Set the caption text to display for the fields used in Group Details. These fields are determined by correlating Lookups. If you enter no caption, the field does not display in Group Details for this Category.

3. Click the **Update** button.
4. Once you setup the Category, click the ***Cluster Types*** link to create or edit Cluster Types for this Category.

Create a Cluster Type

1. Click the **Add New Cluster Type** icon to add a new cluster type.



- **ID** – This is the Arena assigned Cluster Type ID.
- **Name** – This is the name of the Cluster Type.
- **Allow Occurrences** – If checked, attendance is available for the groups in the cluster type.
- **Allow Registrations** – If checked, people can register for the groups in the cluster type.
- **Region Name Lvl** – This is the level used with regions.
- **Unassigned Registration Lvl** – This is the group level where Arena places unassigned group registrants.
- **Total Groups** – The total number of groups using this cluster type.
- **Total Levels** – This is the total number of levels for this cluster type.
- **Total Clusters** – This is the total number of clusters for this cluster type.

2. Complete fields, as desired.

- **Cluster Type ID**- This is the ID number Arena automatically assigns for the cluster type.
- **Name** – Enter the name for cluster type.
- **Region Name Level** – Arena assigns a region level. You can modify, as needed.
- **Unassigned Registration Level** – Enter the (cluster) level for unassigned registrants when users enter them from **Add Registrations** page or from your Arena-managed website.

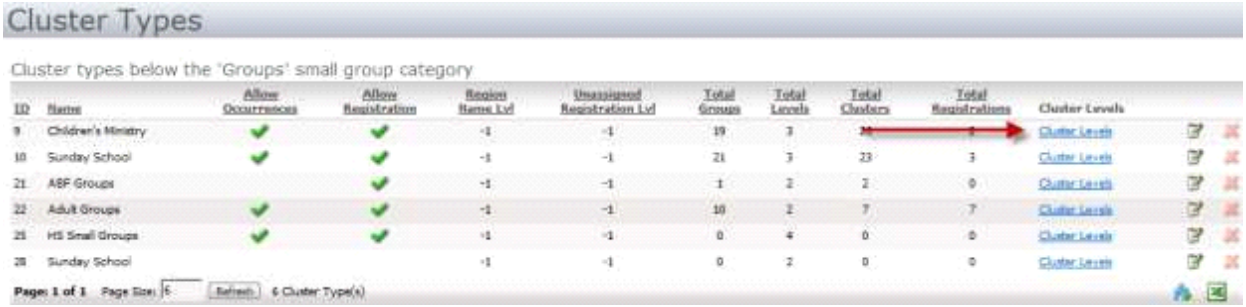
- **Allow Registrations** – Select this box to allow registrations for this Cluster Type.
- **Allow Occurrences** – Select this box to enable taking attendance.
- **Relationships** – Set the relationship scale for this cluster type, as desired. (Refer to Peer Network in this help file for setup information.)

3. Click the **Update** button.

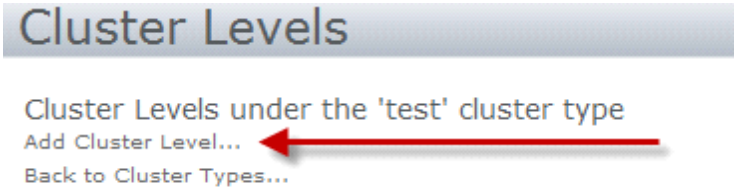
Create Cluster Levels

When creating cluster levels, keep in mind the number of levels determines the depth of the Group Tree.

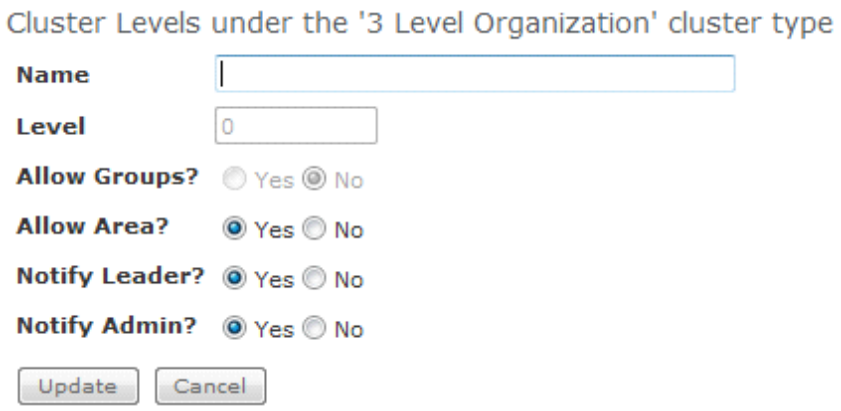
1. Click the ***Cluster Levels*** link of the Cluster Type you would like to add a Cluster Level.



2. Click the ***Add Cluster Level*** link. You need to add levels in order, starting with Level "0." The more levels you add to a Cluster Type, the more levels a Group Tree contains, before displaying the small group. Because of this, it is a good idea to have a layout in mind for small groups before creating cluster types and levels.



3. Complete all fields.



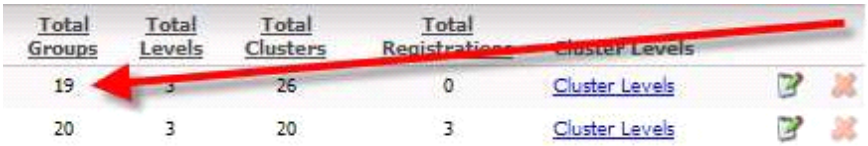
- **Name** – Enter the name of the Cluster level.
- **Level** – This is the pre-determined cluster level.
- **Allow Groups** – Select this option to allow Groups. Only the last (bottom) cluster level should allow Groups.
- **Allow Area** – Select this option to allow Areas for Group Clusters, typically the last level. This is typically set at the last cluster level, where the Groups exist.
- **Notify Leader** – Select **Yes** for Cluster Leaders to receive an email when someone registers for the group.
- **Notify Admin** – Select **Yes** for Cluster Admins to receive an email when someone registers for the group.

4. Click the **Update** button.
5. Repeat steps 2 through 4 until you create the desired number of cluster levels.
6. Once complete, you are ready to create Groups.

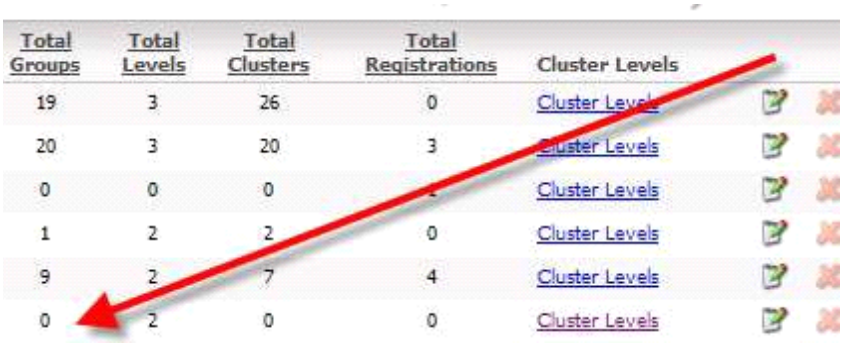
Delete Cluster Levels

Before you can delete a cluster level, you first need to delete all groups associated with the cluster level.

1. The cluster type page displays this number in the **Total Groups** column on the cluster type page.



2. Once you delete all Groups, the Total Groups should display "0."



Total Groups	Total Levels	Total Clusters	Total Registrations	Cluster Levels
19	3	26	0	Cluster Levels
20	3	20	3	Cluster Levels
0	0	0	1	Cluster Levels
1	2	2	0	Cluster Levels
9	2	7	4	Cluster Levels
0	2	0	0	Cluster Levels

3. Now you can click the Cluster Level **Delete** icon.

Level	Name	Allow Groups	Allow Area	Notify Leader	Notify Admin	Total Groups	Total Clusters
0	Level 0			✔	✔	0	0
1	Level 1	✔		✔	✔	0	0

Page: 1 of 1 Page Size: 122 Refresh 2 Cluster Level(s)

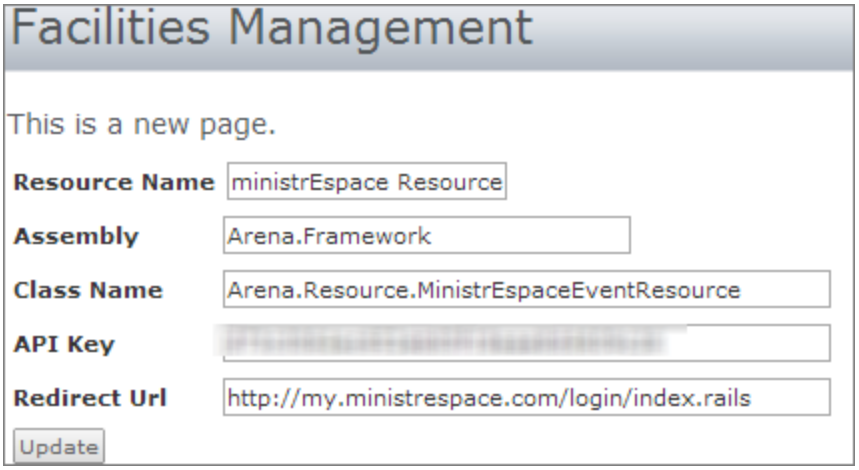
4. Once you delete all Cluster Levels, you can delete the Cluster Type, if desired.

22	Adult Groups	✔	✔	-1	-1	9	2	7	4	Cluster Levels	
24	Test Cluster Type			-1	-1	0	0	0	0	Cluster Levels	

Facilities Management

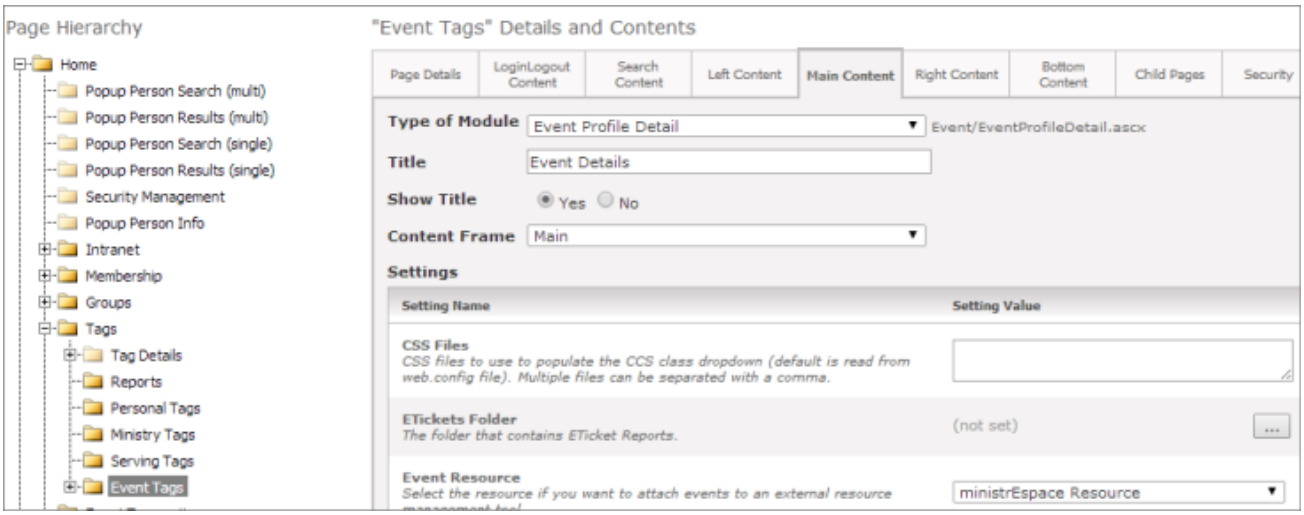
Use the **Facilities Management** page to add the account information for your organization's facility management providers. (Currently, Arena integrates with MinistrEspace.) Follow the steps below to implement this feature.

1. Add your organization's MinistrEspace account information on the **Facilities Management** page.



2. Start the Updated Resource Events Agent.

3. Select MinistrEspace as the Event Resource for the Event Profile Detail module on the **Event Tags** page.



Espace

Added a key setting to the Arena web.config to allow a max buffer size to be set for ESpace. The new setting is "<EspaceBufferSize" value="65536"/>". This allows administration to set larger buffer size values if they are experiencing problems loading large amounts of date with Espace.

```
        <add key="WireServiceUrl" value="https://wire.shelbyinc.com/wireservice.svc"></add>
        <add key="TenantDataPath" value=""></add>
        <add key="EspaceBufferSize" value="65536"></add>
    </appSettings>
```

Campaign Administration

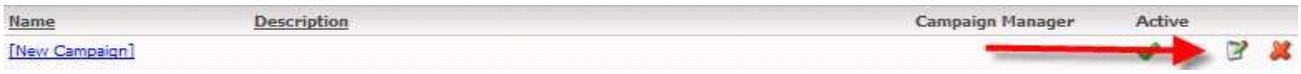
Use this page to setup and administer calling campaigns. Once you create a campaign, users can execute the campaign either from Arena-internal or from your organization's Arena-managed website.

Create a New Campaign

1. From the **Administration** menu, click the **Campaign Administration** option located under the ADMIN heading.

2. Click the ***Add*** link.

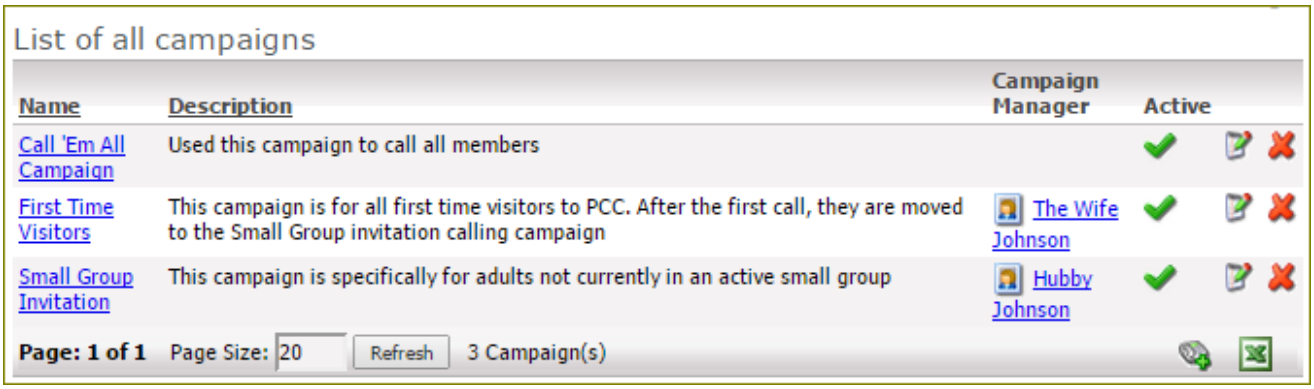
3. Click the **Edit** icon to edit this campaign.



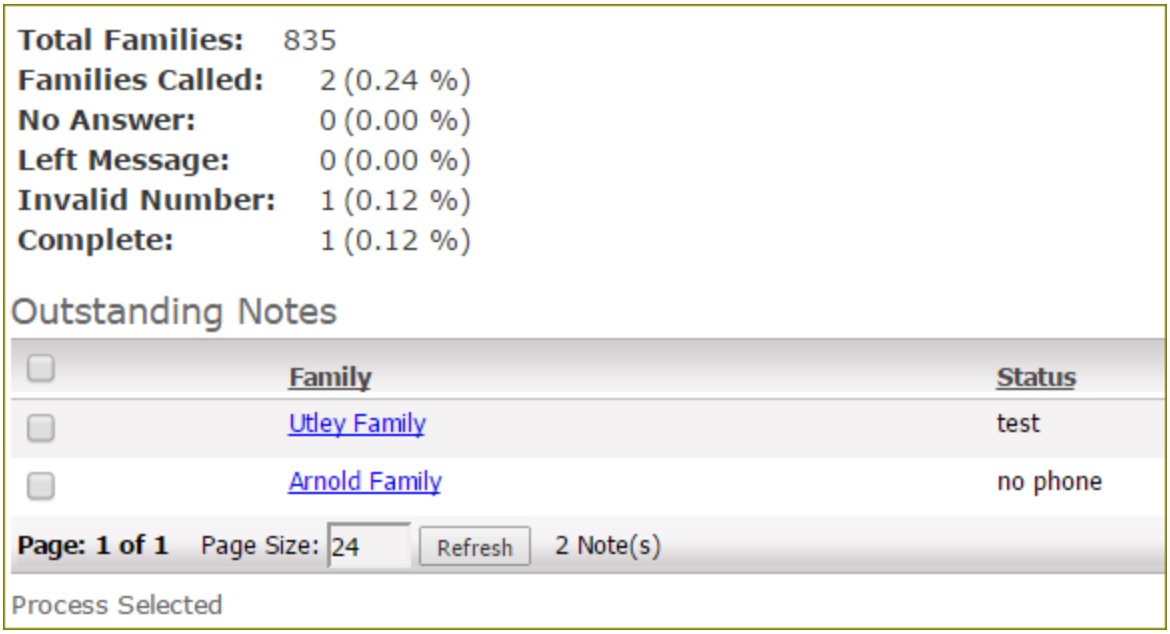
4. Complete all Campaign information.

- **Name** – Enter a name for this Campaign.
- **Description** – Enter a description for this Campaign.
- **Campaign Manager** – Select the person who is the Campaign Manager for this campaign.
- **Active** – Check this box to indicate if this campaign is active.

5. Click the **Update** icon. Once a campaign exists, the list displays the Campaign Name, Description, Active Status, **Edit** icon and **Delete** icon. Click the **Edit** icon to change any of these fields. (Users can add existing records to active campaigns using Person Bulk Update.)



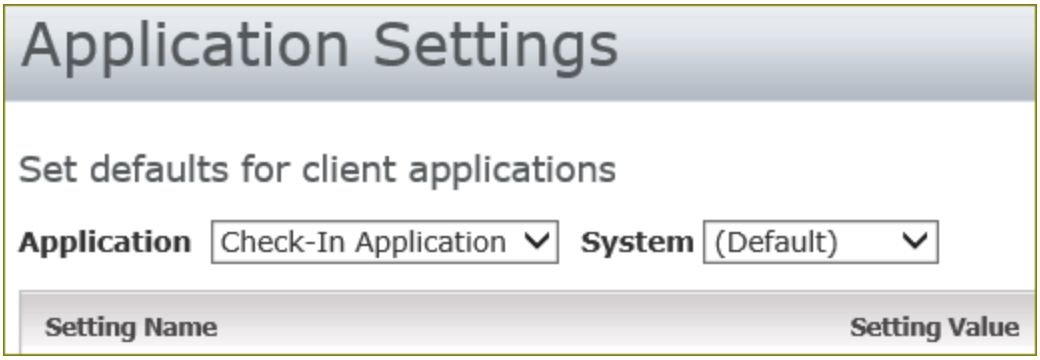
6. From the **Campaign Administrator** page, users with security permissions can select the Campaign ***Name*** link to display the current statistics and process administrator notes entered during the calling campaign.



Application Settings

On this page, you can configure default settings for the Contributions, Mailing, Check-In and Family Registration (Self-hosted only) Click-Once applications. You can also configure some of these settings direct in the applications. (Before running these applications, install Microsoft .Net 4.0, Microsoft Report Viewer 2008, and 2010 on all workstations that use these applications. Whenever you install a new Arena release or patch, click-once applications update automatically. The next time the user runs the click-once application, it automatically updates.)

From the drop-down list, select an **Application** to make changes. Changes are global for all users accessing the application. You can make specific workstation adjustments through the workstation application settings option.



- **Application** – Use this drop-down list to select the desired application to display the application settings.
- **System** – This drop-down list displays the computers that have launched the Mailing application.

Check-In Application Settings

Use this page to make default setting selections. Alternately, you can adjust settings on individual kiosks through the **Check-In Management** page.

Setting Name	Setting Value
Fingerprint Scanner	
Fingerprint Scanner Server *Set the name or IP address of the fingerprint scanner if using finger print scanning. Otherwise, leave blank.*	
Fingerprint Scanner Software Installation Directory *Directory on the local kiosk where the fingerprint scanner software is installed. e.g., C:\Program Files\BioPlugin*	
General	
Auto-select Classes *Enables the automatic selection of a member's classes*	○ True ◉ False
Check In Selection Mode (required) *Choose whether or not you want members to be preselected on the family check-in screen.*	Must Manually Choose Family Members
Show Cursor *Set this to false if using a touch screen and you want to hide the mouse cursor*	◉ True ○ False
Valid Phone Types *Types of phone numbers to search when looking up a family. If no types are selected, the system will default to searching all types. ctrl+click to select multiple.*	Cell Test Main Test Business Test Other Phone 2 Main/Home Business Cell
POS Scanner	
Auto Detect POS Scanner *If a POS scanner should automatically be detected, set this to true. An error will be thrown if this is true and a scanner could not be found.*	○ True ◉ False
Scan sound file name *Specify a filename to override the default scan sound (non-wedge scanners only)*	
Scanner Name *If there are multiple POS scanners, and the application is auto detecting the incorrect one, specify the POS service object name here. Otherwise, leave blank.*	
Screen Size	
Screen Height (required) *Height in pixels*	1024
Screen Width (required) *Width in pixels*	1280
Security	
Number of Security Code Characters (required) *Number of characters to use when generating the security code. Maximum is 8.*	3
Roles with access to check in management *Role(s) that have access to the management area of check in.*	All Users Arena Admin 2 Arena Administrators ArenaAdmin Copy Assignment Workers Attendance Access Attendance Administration
Security Code Characters (required) *List of eligible characters to use when generating the Security Code. Do not seperate with spaces or commas, for example: 'BCDFGHJKLNPQRSTVXZ246789'*	1234567890

- **Fingerprint Scanner Server** – Set the IP address of the fingerprint scanner.
- **Fingerprint Scanner Software Installation Directory** – The directory on the local kiosk where the fingerprint scanner software is installed.
- **Auto-Select Classes** – Specify if Check-In.

- **Check-In Selection Mode** – Use this drop-down list to set if all family members are automatically selected, once a family member enters the phone number or if each family member must be selected.
- **Show Cursor** – Set to display the cursor or not.
- **Valid Phone Types** – Select which phone type to allow for entry.
- **Auto Detect POS Scanner** – Set to True to automatically detect POS scanner, if using barcode readers.
- **Scan sound file name** – Enter the file path for the sound file, to play after barcode is scanned.
- **Scanner Name** – Option to set POS service object name.
- **Screen Height** – Enter the default screen height.
- **Screen Width** – Enter the default screen width.
- **Number of Security Code Characters** – If using security codes, enter the number of characters to use.
- **Roles with access to check-in management** – Select the security roles that should have access to Check-In Management.
- **Security Code Characters** – Enter the alpha and numeric values to use for the security code.

Contribution Application Settings

Use this page to make default setting selections. Alternately, you can adjust settings on individual workstations through the Contributions Application settings.

Setting Name	Setting Value
Attendance Processing	
Days Back *Number of days back from today that occurrences should be displayed in the drop down.*	2
Process Attendance *Allows choosing an occurrence to mark all givers as attended for that occurrence.*	◉ True ○ False
Check Scanner	
MICR Comm Port *(Optional) COMM port that the MICR scanner is on*	
Temp Image Path *Temporary directory to place scanned images. If left blank, defaults to a directory named 'TempImages' underneath the current application's directory.*	
General	
Allow Importing *Sets whether or not to allow importing of contribution XML files.*	◉ True ○ False
Batch Label Lookup Type *(Optional) Lookup Type ID that contains lookup values to display in the 'Batch Label' drop down*	
Batch Report Path *(Optional) The Reporting Services batch list report.*	BatchReport ...
Fund Priority List *(Optional) Priority List of most commonly used Funds. Set to 'BLANK' to use a blank list where the user can select which fund to give to from a list.*	BLANK GlennTest JF Test Pledge 2015 Cache Test 5 Remittance Fund Test Cache 6 Test Cache 7
Roles with access to Finalized Batches *Allows choosing which roles have access to the Finalized Batches screen*	All Users Arena Admin 2 Arena Administrators ArenaAdmin Copy Assignment Workers Attendance Access Attendance Administration
Roles with access to only Mission contributions *Limits the users with these roles to only enter mission contributions. They will not be able to enter contributions for other funds.*	All Users Arena Admin 2 Arena Administrators ArenaAdmin Copy Assignment Workers Attendance Access Attendance Administration
Show Batch Report Button *Show a button on the batch list to run a report against the selected batch(es)? Runs the report specified in the 'BatchReportPath' setting.*	◉ True ○ False
Show Inactive Warning Message *Sets whether or not to show the warning message when an inactive member is selected for giving.*	◉ True ○ False
Show Pledge Information *Sets whether or not to show the pledge information next to the fund values.*	◉ True ○ False
Show Project Codes *Sets to show project codes when entering contributions.*	◉ True ○ False

- **Days Back** – Enter the number of days back from the current day occurrences should display, if taking attendance at time of contribution processing.
- **Process Attendance** – Set to true if marking attendance at time of contribution processing. Attendance is marked for the individual contributor.

- **MICR Comm Port** – You can optionally specify the communication port for the check scanner that should be automatically detected.
- **Temp Image Path** – Temporary directory file path where scanned images are stored. Default location is the Image Cache folder.
- **Allow Importing** – If using Shelby Teller, set to True to import scanned batches.
- **Batch Label Lookup Type** – Use this option to specify a different Lookup Type to use for batch labels.
- **Batch Report Path** – Use this option to select the batch report if different from the default.
- **Fund Priority List** – Select the funds that should be available by default for all users. Users can also select funds to be available. All other active funds display in a drop-down list.
- **Roles with access to Finalized Batches** – Select security roles of users who should have access to finalized batches.
- **Roles with access to only Mission contributions** - Select security roles of users who can process mission traveler contributions.
- **Show Batch Report Button** – Select **Yes** to display batch report button.
- **Show Inactive Warning Message** - Select **Yes** to display inactive warning message when selecting an inactive record.
- **Show Pledge Information** – Select **Yes** to display pledge information.
- **Show Project Codes** – Select **Yes** to display project codes.

Family Registration Application (available for Self-hosted clients only)

Use this page to make default setting selections. Alternately, you can adjust settings on individual kiosks through the Family Registration application settings.

Setting Name	Setting Value
General	
Allow Check-In (required) *If set to true, then a 'Check In' button will be visible when looking at a person.*	◉ True ○ False
Attribute Groups *Comma delimited list of attribute group ids to show when editing a person.*	DISC External Profile Primary Education Employment Giving Member Security Membership Details
Default Campus *Default campus to use when creating a new person record.*	
Default Member Status *Default member status to use when creating a new person record.*	(not set) ...
First Time Visit Attribute ID *Attribute ID of optional First Time Visit Date attribute. If specified will override the value defined in the 'FirstTimeVisitAttributeID' organization setting.*	
Image Path *Image path to images used by family registrations application. If left blank, defaults to the 'Images' folder underneath the application path.*	
Prompted for Assigned Cards (required) *If set to true, then the user will be prompted if the person being edited does not have any alt IDs assigned.*	◉ True ○ False
Search by Security Code (required) *If set to true, then the user will be able to search for a person by a security code for someone currently checked in.*	○ True ◉ False
Timeout Minutes (required) *Number of minutes of idle time before automatically logging off the current user*	5
Printer	
Printer Margin Bottom	
Printer Margin Left	
Printer Margin Right	
Printer Margin Top	
Printer Name	
Printer Orientation	Landscape
Printer Paper Height	2.0
Printer Paper Width	4.0
Printer X Offset	
Printer Y Offset	

- **Allow Check-In** – Set to True to allow check-in for new records.
- **Attribute Groups** – Select the Person Attributes group to make available.
- **Default Campus** – If using multi-campus, you have the option to set the default campus for new records.

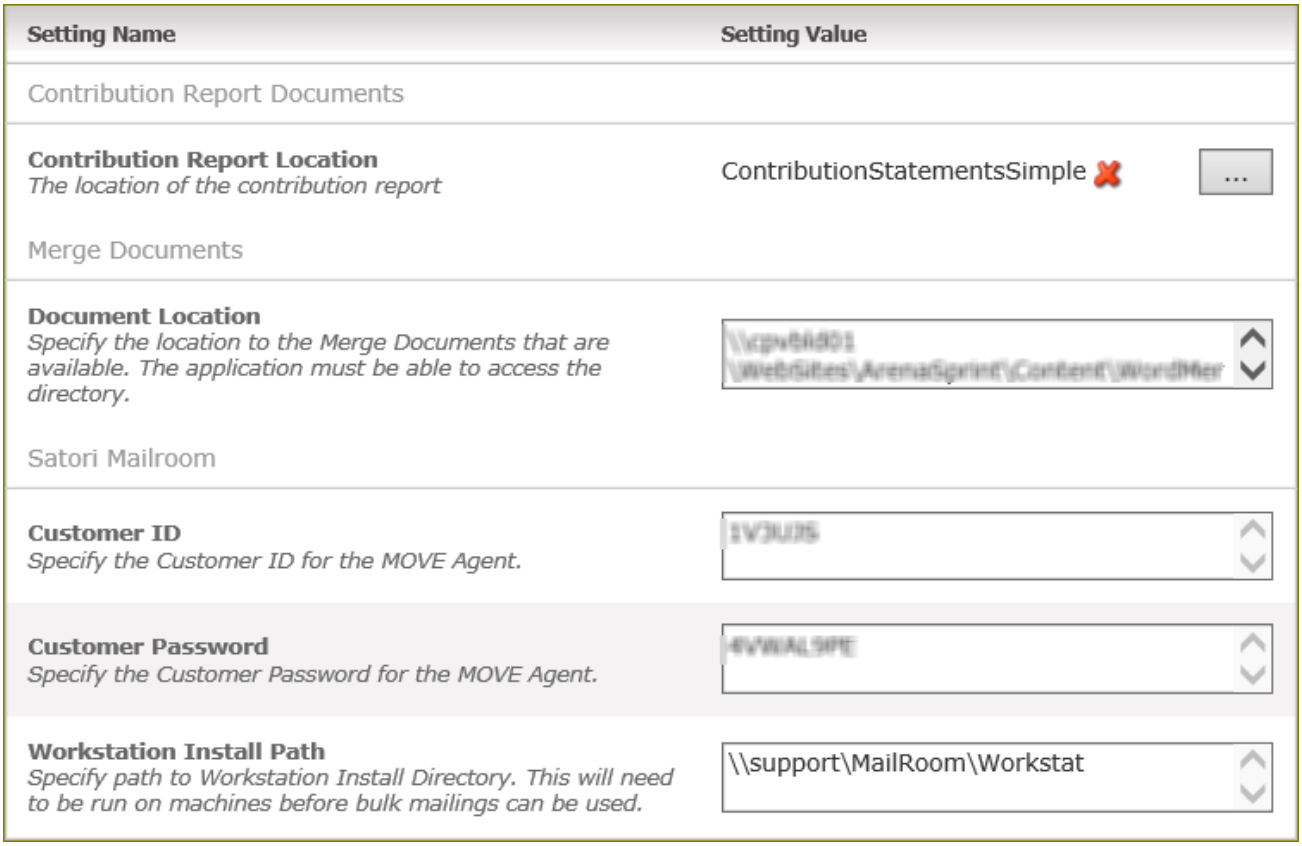
- **Default Member Status** – Set the default member status for new records.
- **First Time Visit Attribute ID** – Set the person attribute to populate with first visit date.
- **Image Path** – Optional setting for the file path to store new images/photos. Default location is the ~Images folder.
- **Prompted for Assigned Cards** – Set to True if your organization assigns member cards for new visitors.
- **Search by Security Code** – Set to True to search for a person by a security code.
- **Timeout Minutes**- Enter the number of minutes to pass for inactivity for the current user.
- **Printer Settings** – Set all printer settings if printing member cards.

Mailing Application Settings

If your organization currently has a Mailroom subscription, users can continue to use the features available in **Mailroom** from the **Membership** menu and **Mailing** option once you configure the current account on this page.

Now let's discuss loading Mailroom on the server, as opposed to each workstation. For self-hosted clients, you can install Mailroom on the server. If Shelby v.5 and Arena are not using the same server but are on the same network, enter the file path in the Workstation Install Path application setting. It is recommended that you install MailRoom on your Arena SQL server, however if you are still using it in Shelby v.5 you need to keep it on the Shelby v.5 server.

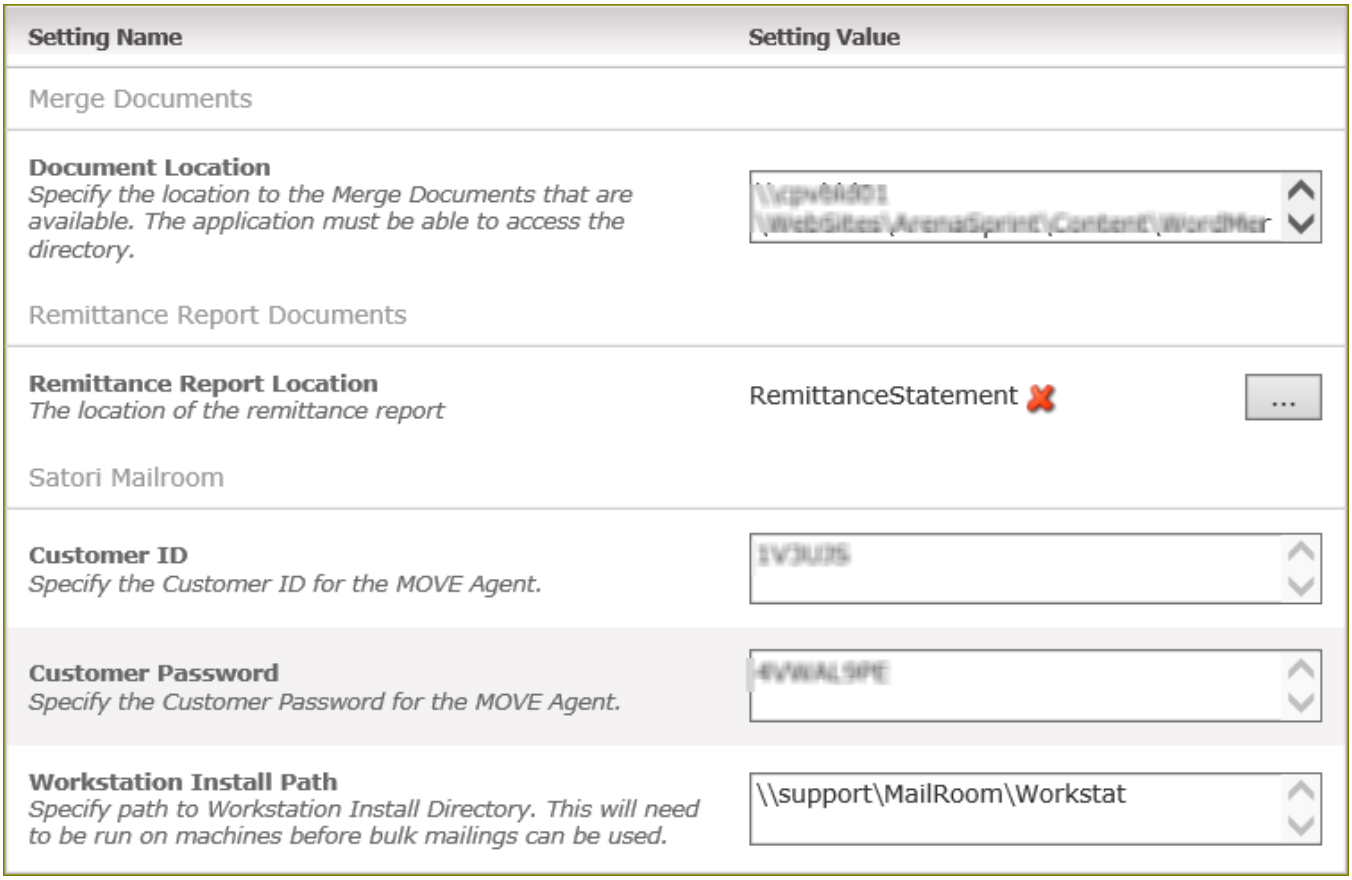
(For hosted clients, you can continue to install Mailroom on the local workstations using the application.)



- **Contribution Report Location** – This is the contribution statement report for contribution statements.
- **Document Location** – This is the file path for word merge documents. It should be a shared UNC path in order for the workstations to see the folder.
- **Customer ID** – This is your Shelby Mailroom customer ID.
- **Customer Password** – This is your Shelby Mailroom password.
- **Workstation Install Path** – This is the file path to Mailroom. The workstation install path is typically C:\MailRoom\Workstat. Install differs if MailRoom is installed on a different drive or in a different location other than on the root of the C drive.

Mailing Remittance

Mailing Remittance settings are similar to the Mailing Application settings with the only difference being the Remittance Report.

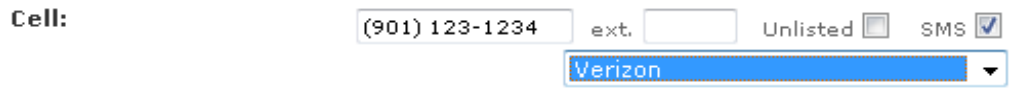


SMS Text Messaging

Arena offers the default ability to send SMS (Short Message Service), also known as TEXT messaging via email. The default functionality is a one-way SMS communication and requires the carrier of each recipient to be identified on each record. Your organization can optionally subscribe to the StrikeIron SMS service whereby the only information needed from the recipient is the SMS enabled phone number.

Allow SMS via Email

1. Set the SMS via Email Enabled Organization Setting to “True.”
2. Add, update, or deactivate the providers in the SMS Email Gateway Formats Lookup. A list of major providers is available, by default.



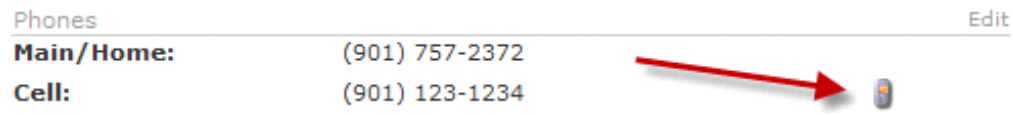
3. Customize Mail Merge module settings on the **SMS Communication** page such as scheduling and thresholds. The Mail Queue Agent must be running to schedule any Communication.

4. Update all pages where the SMS module setting is available, as desired. Below is a list of the modules where the SMS link is available.
   - Popup Person Results (single) and Popup Person Results (multi) pages
   - Individual Information page
   - Report Grid page
   - Tag Details page
   - Volunteer Administration page
   - Team Members page
   - Mission Details page
   - List Report View module

5. If using Thresholds with Approval, add a page with the Communication Approval List module.

6. Once everything is in place, users can initiate an SMS from the **Person Detail** page or from a person list page, as shown on the next page.

SMS from Person Detail Page



SMS from Person List Page

Arena also offers the option for two-way SMS communication that requires a subscription with **StrikeIron**.

Follow the below steps to enable this option.

1. Verify **StrikeIron** account is a Global 2.5 account.

2. Customize the **Organization Settings** as shown below.

SMS Provider_Password	Organization	SMS Provider password
SMS Provider_UserName	Organization	SMS User Name (typically an
SMSViaEmailEnabled	Organization	Set to true to send SMS mes provider are set in the "SMS

- **SMS Provider Password** – Enter the StrikeIron password.
- **SMS Provider UserName** – Enter the StrikeIron UserName.
- **SMSViaEmailEnabled** – Set this to False.

Background Checks (Optional)

Arena offers the ability to manage background screenings directly in Arena. Once you establish an account with one of the integrated background check processing companies, your organization can request, approve and maintain background checks for all records. Arena integrates with Protect My Ministry. Your organization can use one or the other. We recommend establishing policies and procedures for processing staff and volunteer background checks. Your insurance provider, HR professional or legal counsel can also advise you.

Features:

- Populate the name, social security number, date of birth and address.
- Provide a simple process to run a background check.
- Alternatively, you can have the subject fill out the form and submit it online.
- Provide levels of authorization so that approval can be required prior to processing a background check and for reviewers of the background check report.
- Maintain the status of the background check.
- Download the screening results and store it securely on your system, if desired.
- Allow designated staff to review the results and select “Pass” or “Fail” for the candidate.

Configuring Background Checks:

Protect My Ministry

System Emails

Agent

Requesting and Reviewing Background Checks:

Membership > New Background Check

Membership > Background Check

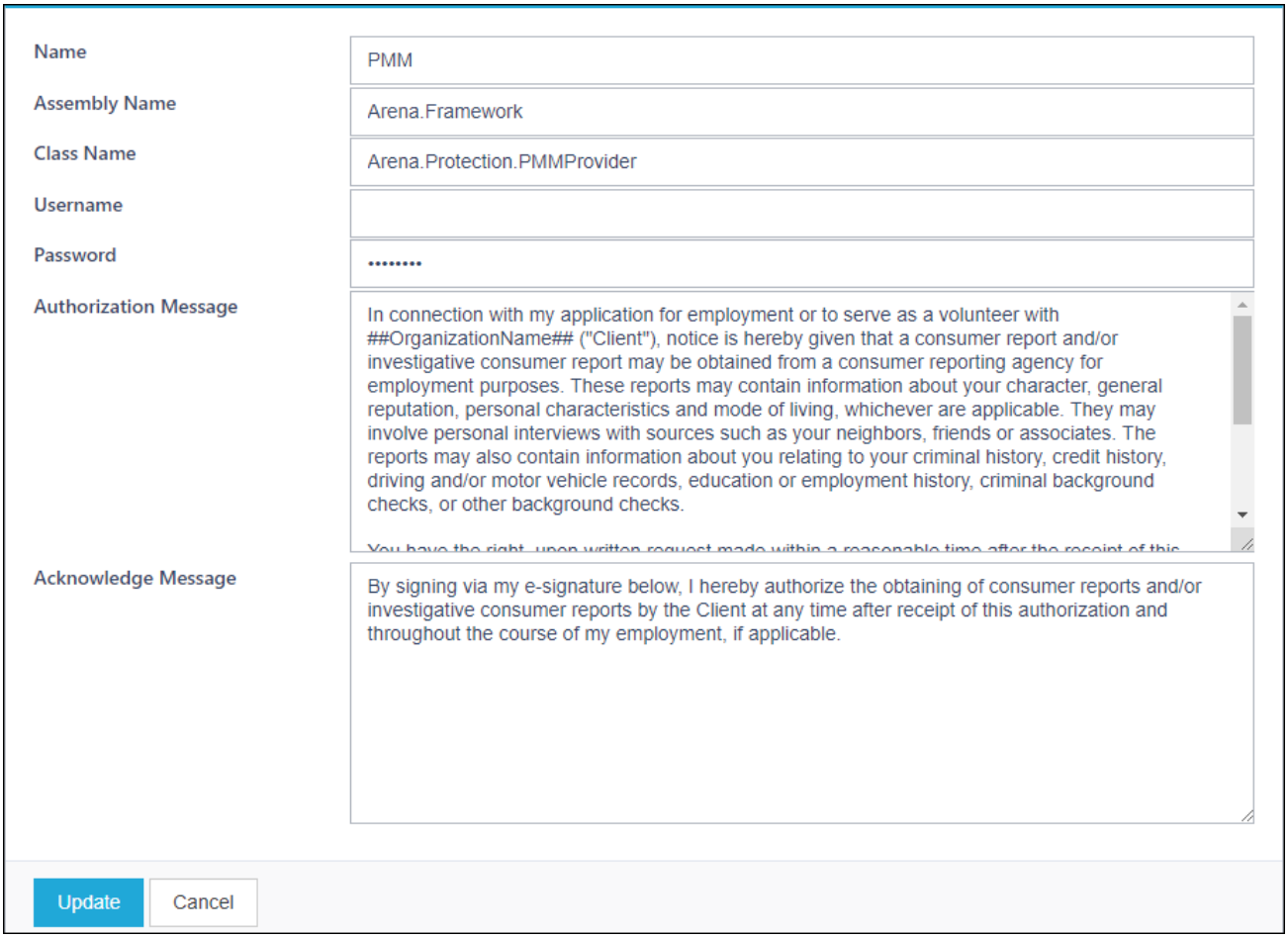
Setup Steps to Use Protect My Ministry

Create a Protect My Ministry account. Visit the Protect My Ministry website to create an account or contact your existing representative to notify them of the move to Arena.

Setup Steps to use Protect My Ministry

1. From the **Administration** menu, click the **Background Check Configuration** option located under the ADMIN heading.
2. Click the **Add New Background Check Provider** icon.

3. Enter Account Information.

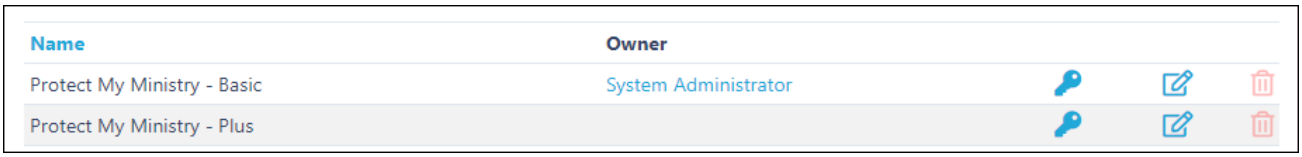


4. Click the **Update** button.

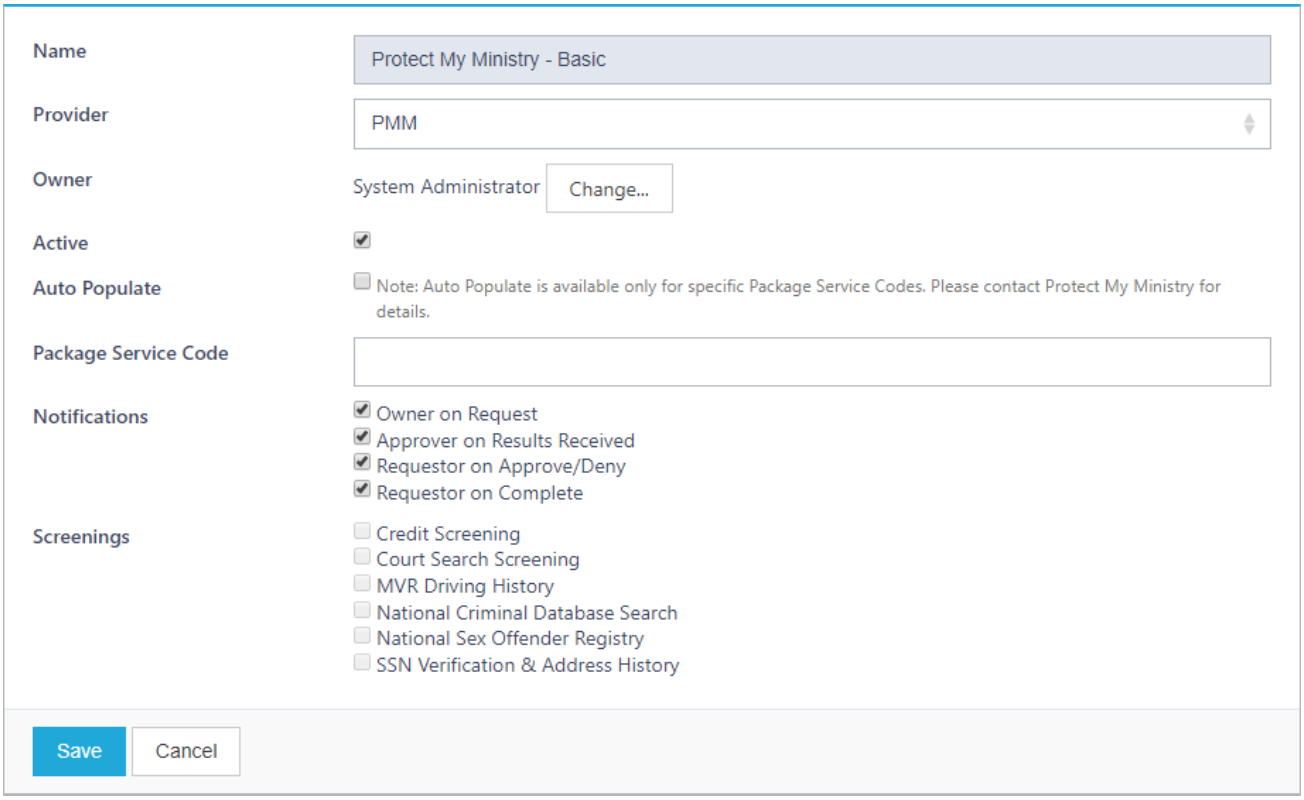
5. Verify and customize Background Check Types in Administration. Arena includes a Basic and Plus background check type. Click the **Add New Background Check Type** icon to add a background check type.

6. From the **Administration** menu, click the **Background Check Types** option located under the CONFIGURE heading.

7. Click the **Edit** icon on the far right of the Type you want to customize.



Customize available fields.



8. Click the ***Change*** link to search and select an existing record as the owner. The current user is the default owner.

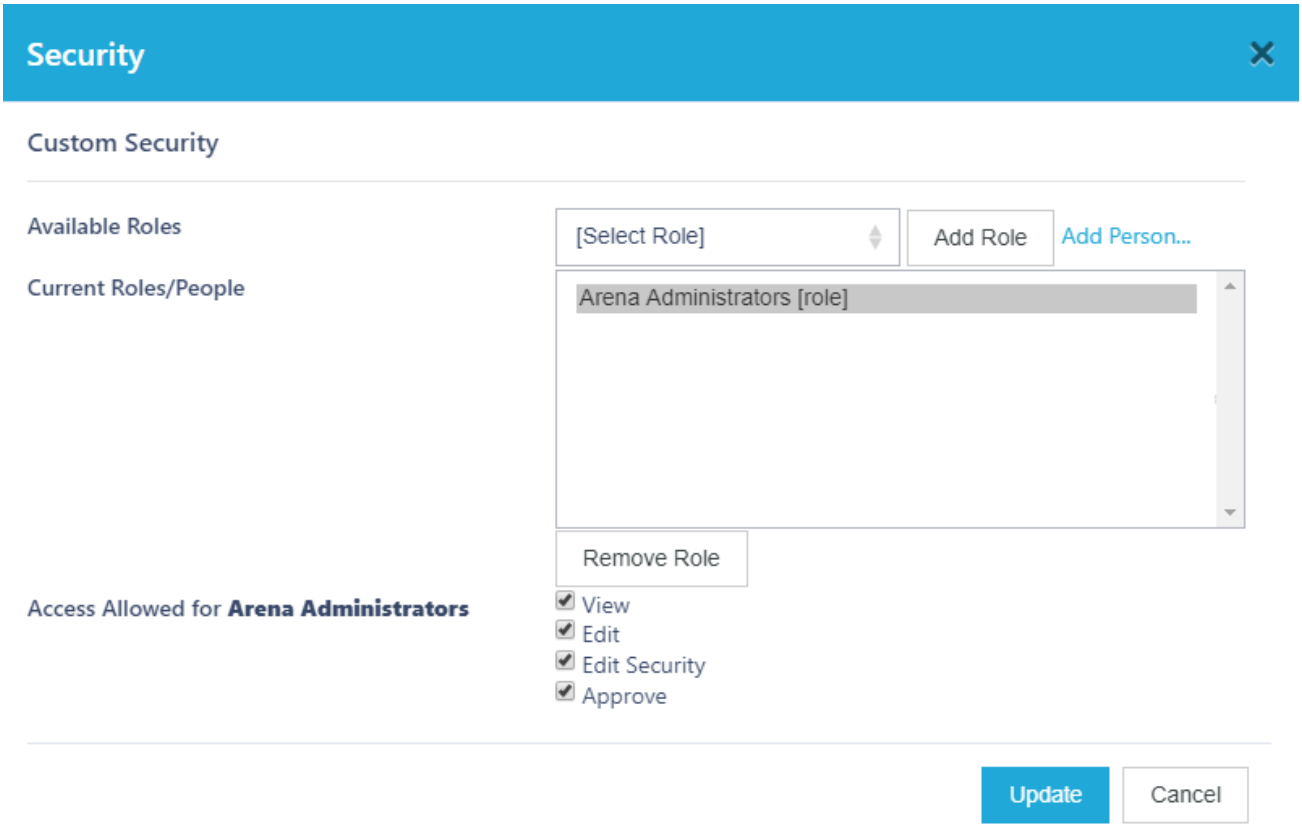
- **Active**: Select this check box for the background type to be active.
- **Auto Populate**: Select this check box to allow the background check eform to auto populate the person's information on the new background check page.
- **Package Service Code**: Use this field to name the background check type.
- **Notifications**: Select the email notifications for this background check type. Also start correlating Agents to customize correlating System Emails.
- **Owner on Request**: Select this check box if you want Arena to email the background check type owner when a staff member creates a request.
- **Approver on Results Received**: Select this check box if you want Arena to send an email to the approver when individual reports are available for review.
- **Requestor on Approve/Deny**: Select this check box if you want Arena to send an email to the requestor when the background check request is approved or denied.
- **Requestor on Complete**: Select this check box if you want Arena to send an email to the requestor when the background check is done.
- **Screenings**: For non-default screenings, select or deselect screenings as desired.

Basic Plan Screenings:	Plus Plan Screenings:
National Criminal Database Search National Sex Offender Registry SSN Verification & Address History	National Criminal Database Search National Sex Offender Registry SSN Verification & Address History Credit Screening Court Search Screening MVR Driving History

9. Click the **Save** button.

10. Set security for each Background Check Type.

11. Click the **Security** icon for the Background Check Type.



12. Set security for the Background Check Types.

- **View**:This permission allows users to view requests for this background check type.
- **Edit**: This permission allows users to edit requests, including initial requests, for this background type.

- **Edit Security**: This permission allows users permission to edit security for the background check type.
- **Approve**: This permission allows users to approve background check requests.

13. Set security for the New Background Check and Background Check pages and modules on the **Pages/Modules** tab of the Security Role(s).

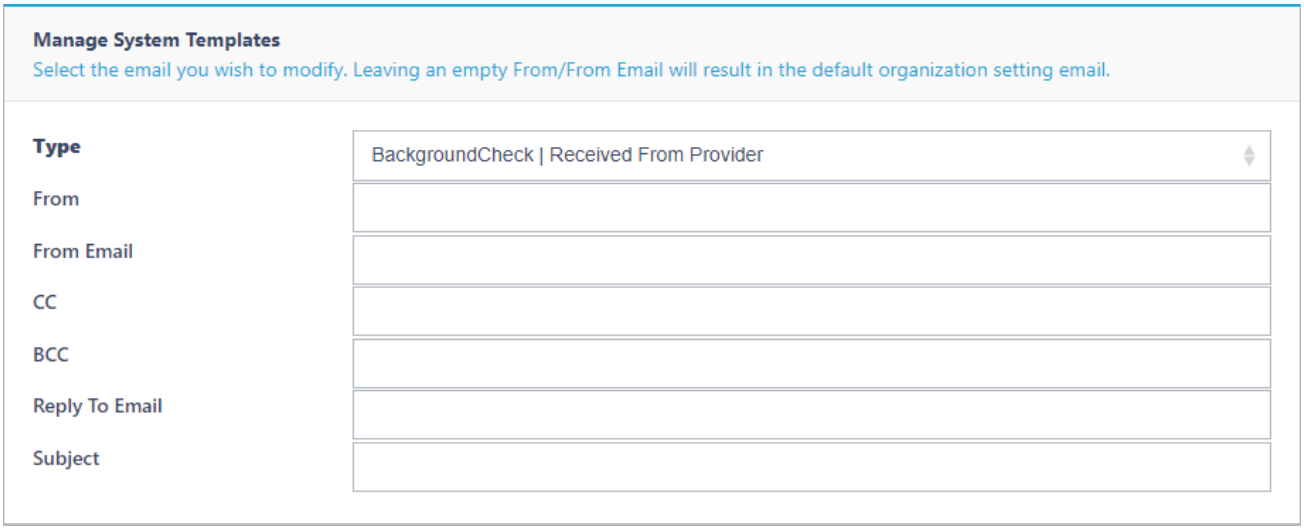
14. Set security for the Background Check section on the **Person Detail** page.

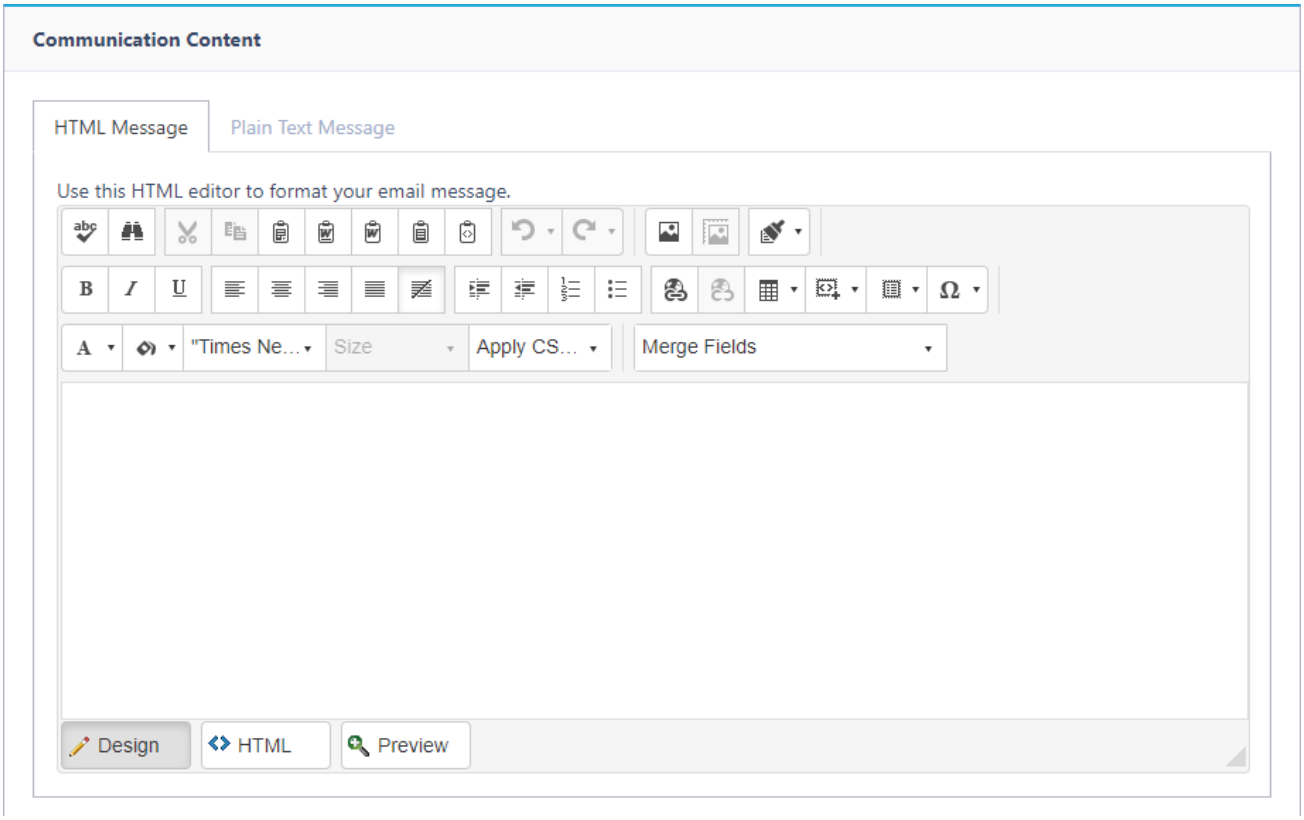
15. Refresh Cache and test.

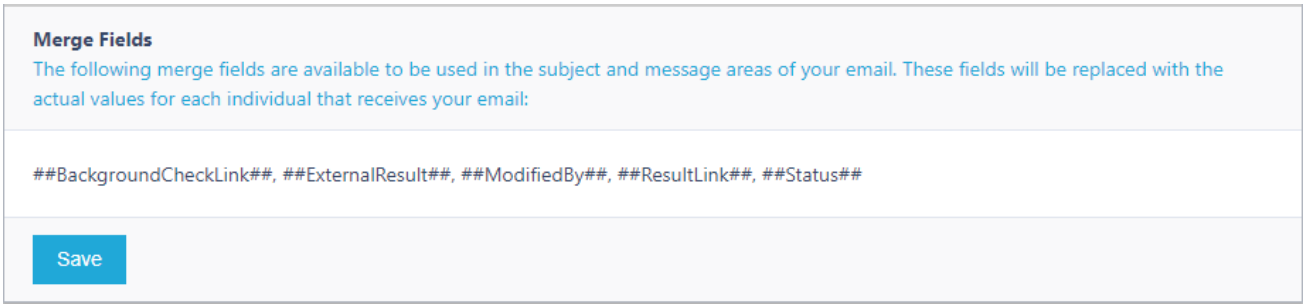
Setup Background Check System Emails

From the **Administration** menu, click the **System Emails** option located under the CUSTOMIZE heading.

1. Select the first system email to customize. The three separate system emails are **Received from Provider**, **Requested**, **Send to Applicant**, and **Updated**, and **User Submitted**. Consider using the available merge fields codes to provide adequate information in the email.







2. Click the **Save** button.

Background Check Agent Settings

This Section Includes:

[Add New Job](#)

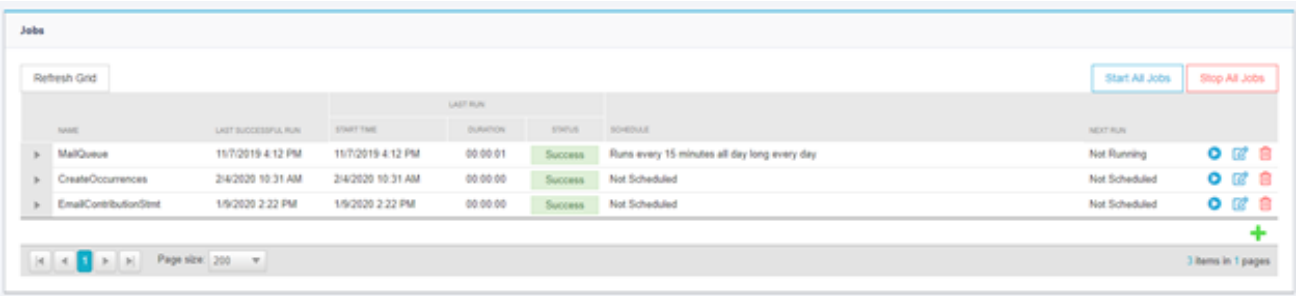
[Additional Settings](#)

[User Submitted Background Checks](#)

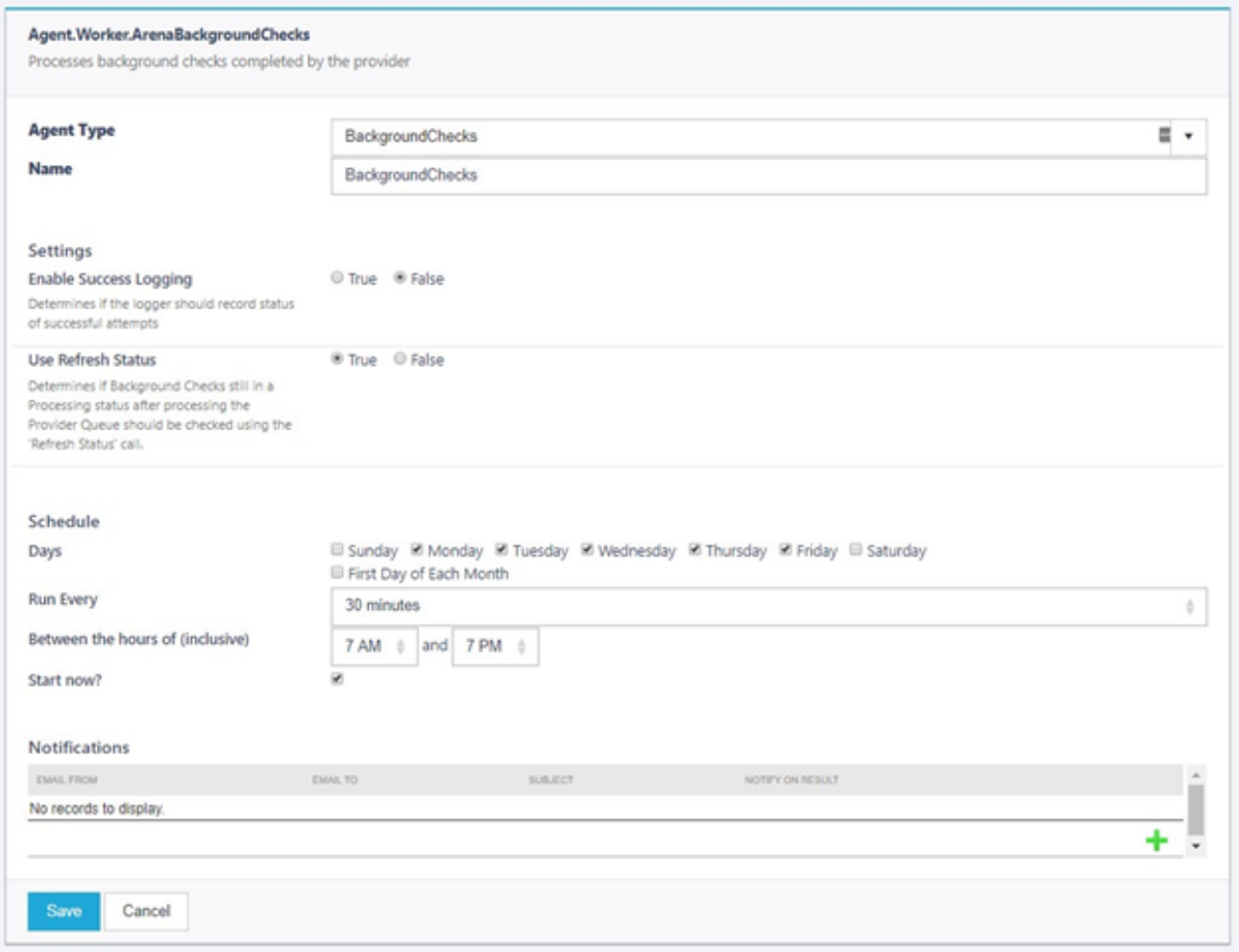
Add New Job

1. Go to **Administration** > **Agent Management**.

2. Click on the Plus icon at the bottom right to add a new job.



3. The basic settings are as follows.



4. Click on **Save** when you have entered your settings.

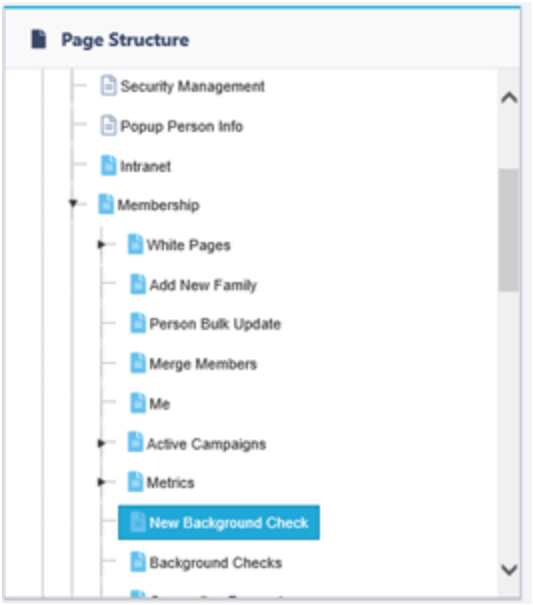
NOTE: We recommend having the agent run several times per day Monday through Friday between 7 AM to 7 PM. Protect My Ministry only processes responses during these times.

Additional Settings

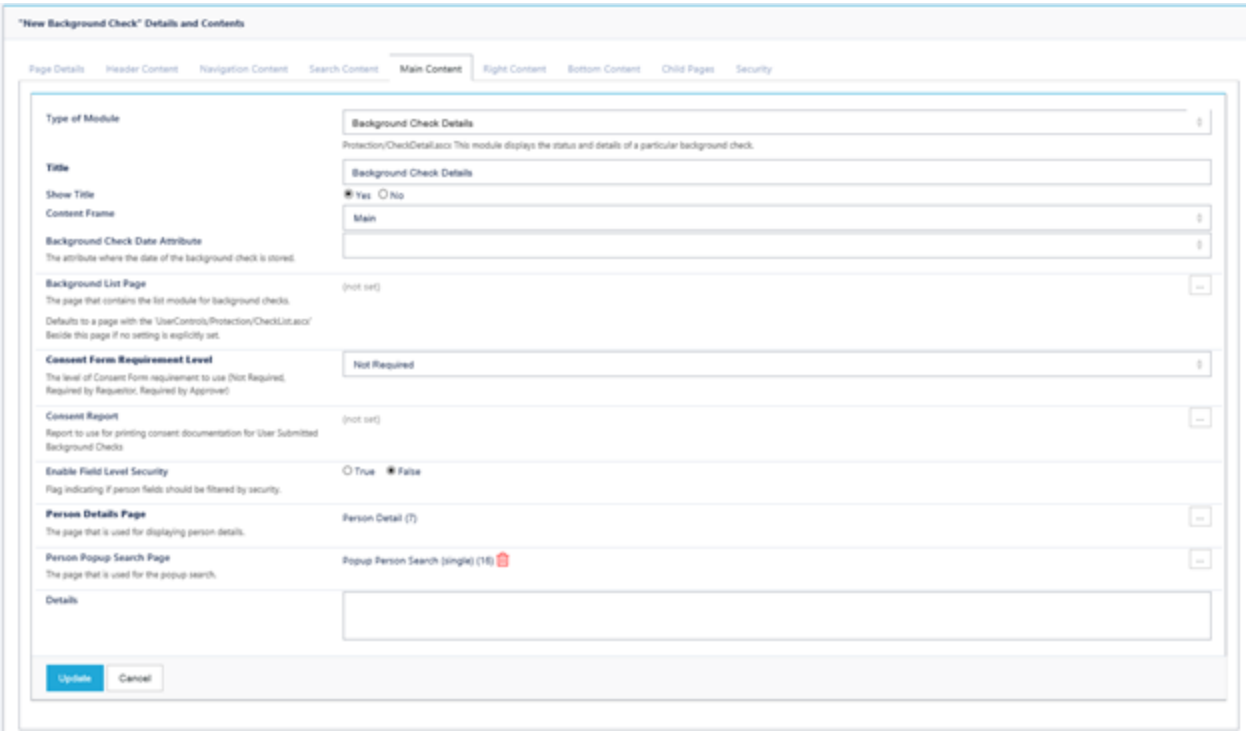
Optional Make Approval of checks Required

1. Go to **Administration** > **Pages**.

2. Navigate to **Home** > **Membership** > **New Background Check**.



3. Click on **Main Content** > B**ackground Check Detail**.



4. Update the settings as needed – Settings in Bold require a setting

   a. Consent Form Required: Who needs to record that a consent form is on file for the background check.

   b. Enable Field Level Security: The fields a person can see on the background check will match what they can see when they open a person's record.

   c. Optional: Background Check Attribute: Link to a Person Attribute of the date type to track when a check was submitted.

   d. Optional: Consent Report: If you choose to enable user submitted background

checks, this allows you to print the consent forms submitted by the subject

User Submitted Background Checks:

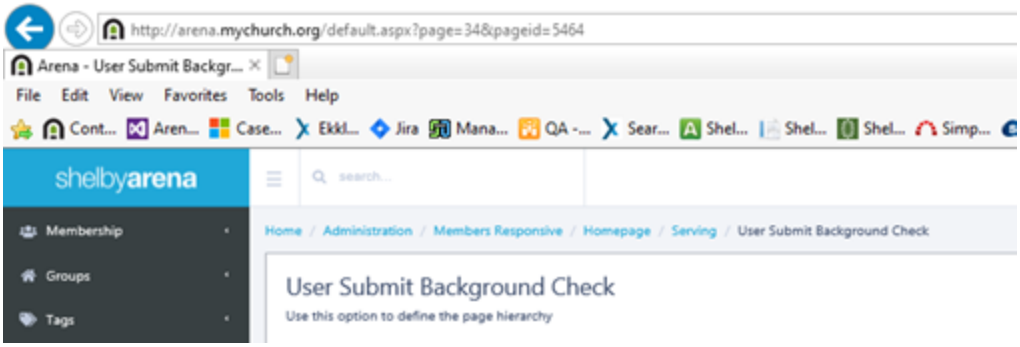
You will need to add a setting that points to the online page where a person submits the background check. (You will need to have a version of the Members site active.)
If you need any assistance, please contact support and we can help

1. Start with the public URL for your church. **https://members.mychurch.org** or **https://churchnameweb.myshelby.org**.

2. Go to **Administration** > **Pages**.

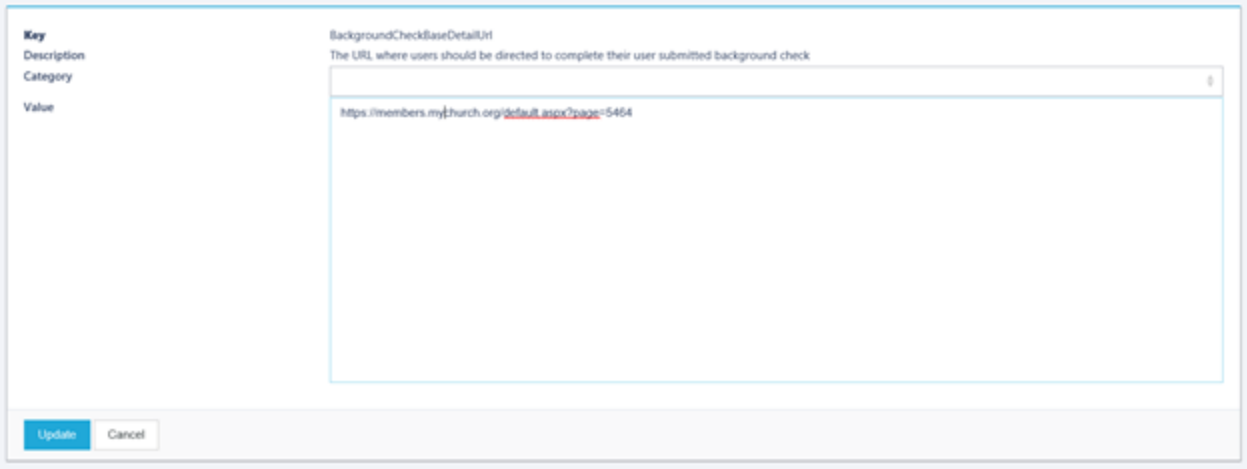
3. Navigate to **Members Responsive** > **Homepage** > Serving > **User Submitted Background Check**.

4. Get the page from your URL, page 5464 in this example:



5. Go to **Administration** > **Organization**. (If you only see a list of Organization Names you will click on Your Organization's Name).

6. Find the **BackgroundCheckBaseDetailUrl** Setting and add the page in the following format: https://members.mychurch.org/default.aspx?page=5464.



Utilities

Tags to Attributes

Use this utility to move dates and notes from an existing tag to a Person Attribute.

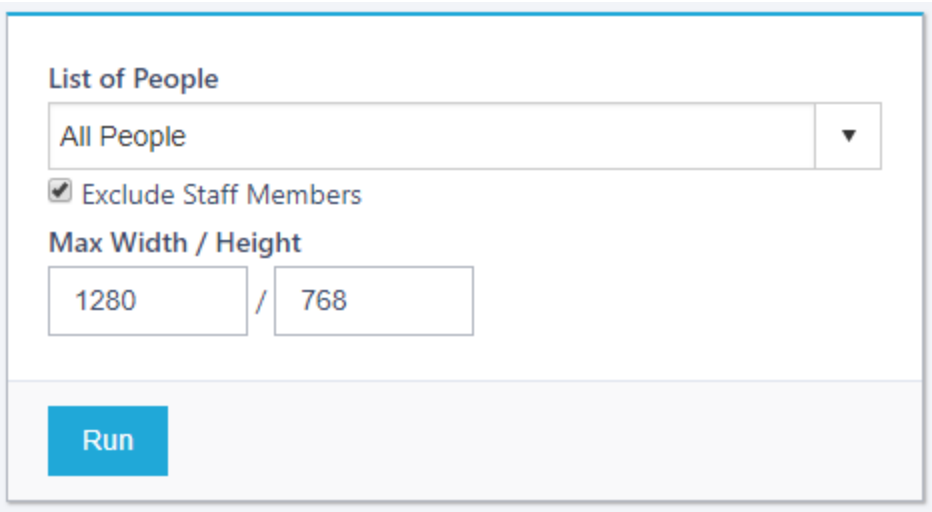
1. From the **Administration** menu, select the **Utilities** option.
2. Click **Tags to Attributes**.
3. Choose the **Tag**.
4. Choose the **To Attribute**.
5. Click the check box to **Overwirte Existing** if desires.
6. Click **Move** to begin the process.

Resize Person Photos

Use this utility to update Person Photos to a specific size. This may reduce the overall size of your

Arena database if your existing photos are a higher resolution than the size you specify.

1. From the **Administration** menu, select the **Utilities** option.
2. Click **Resize Person Photos**.



3. Choose the **List People** from the drop-down list that you would like to update.
4. Click the check box to **Exclude Staff Members**.
5. Enter the **Max Width / Height** in pixels (e.g., 1280 / 768). The aspect ratio of the images will be retained.
6. Click **Run** to begin the process.

Person Import

Use this utility to import multiple Person Records via a CSV file.

1. From the **Administration** menu, select the **Utilities** option.
2. Click **Person Import**.
3. Click **Choose File** and select the CSV file to import.
4. **Add to Tag** by clicking the Select icon and choose an Arena Tag.
5. Click **Continue**.

Auto Adult

Use this utility to migrate "Child" records over a specific age to a new family and link to old family with Releationship.

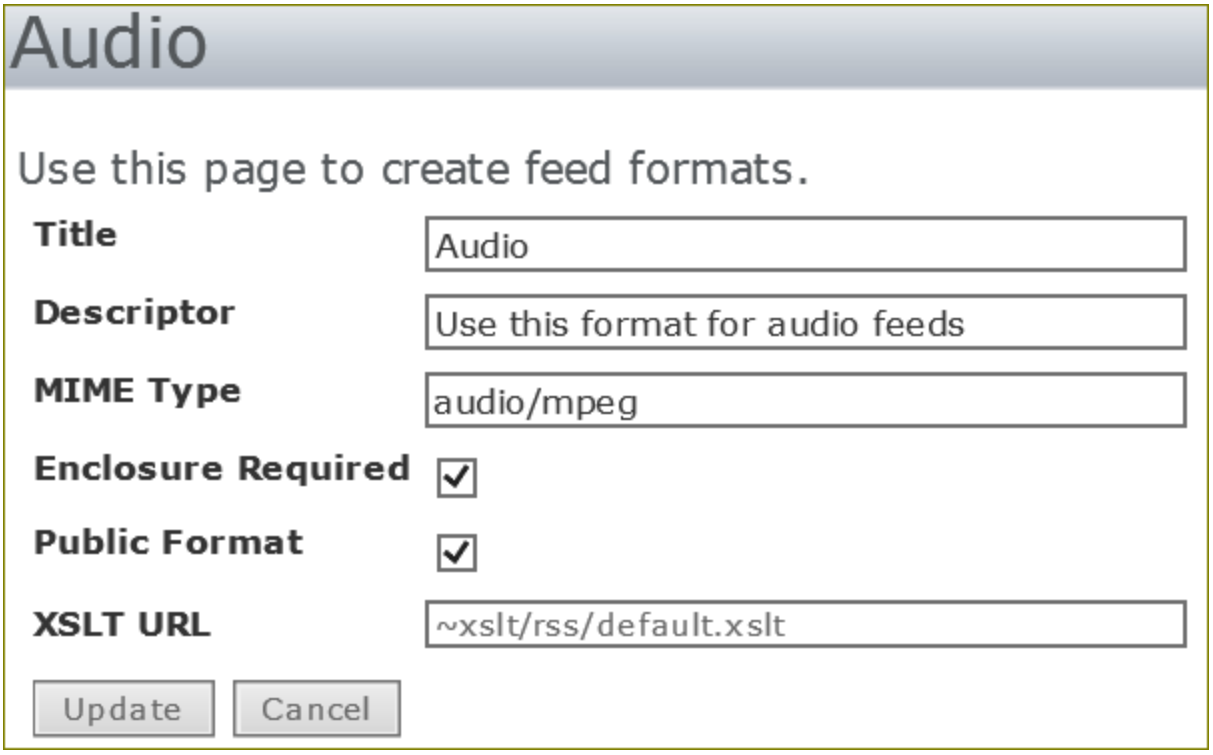
1. From the **Administration** menu, select the **Utilities** option.
2. Click **Auto Adult**.
3. Choose the Minimum Age for the list to migrate.
4. Choose the **Child Relationship** to assign.
5. Choose a **Tag to Ignore** if needed.
6. Click **Show List**.
7. Check those that you want to migrate to a new family.
8. Click **Process Now**.

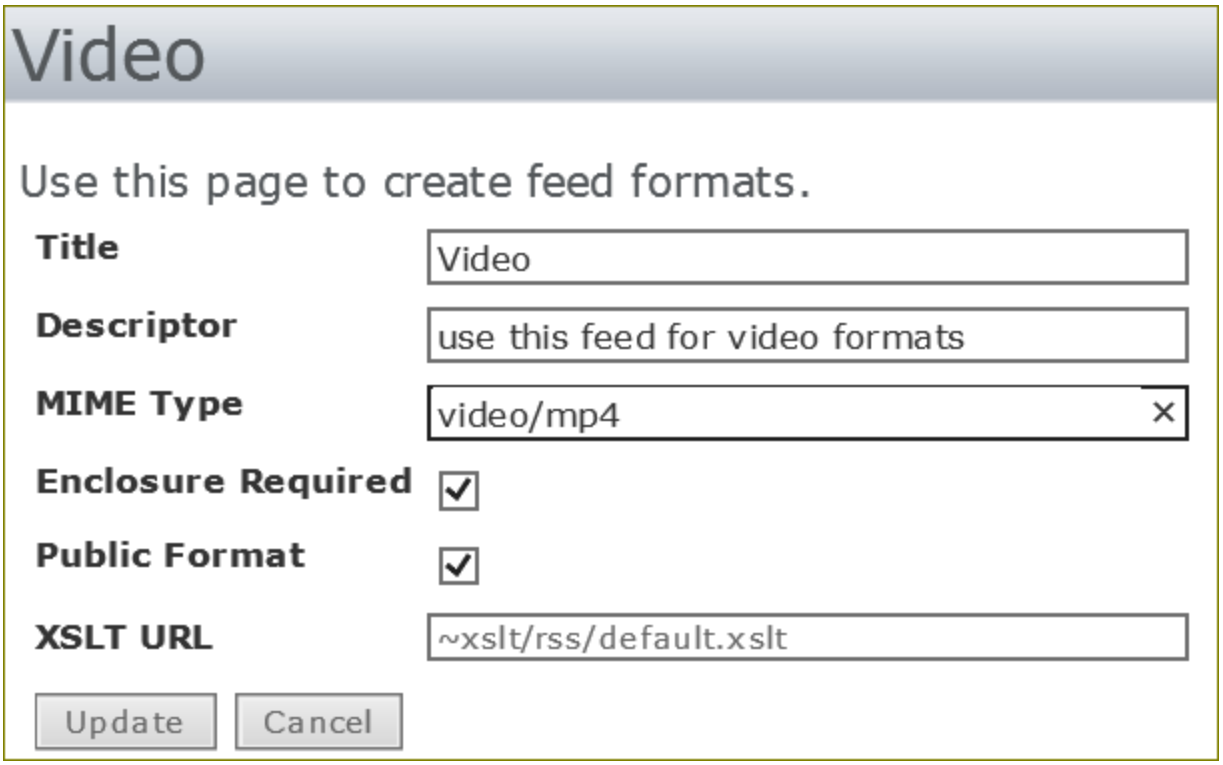
Feed Formats

On this page, you create various feed formats to use with the any Arena portal. You need to setup a separate feed for each file type you would like to podcast, e.g., MP3, MP4, MOV, AVI, etc. For this example, we use MP3 for audio and MP4 for video.

Setup a Feed Format

1. Click the ***Add New Feed Format*** link.



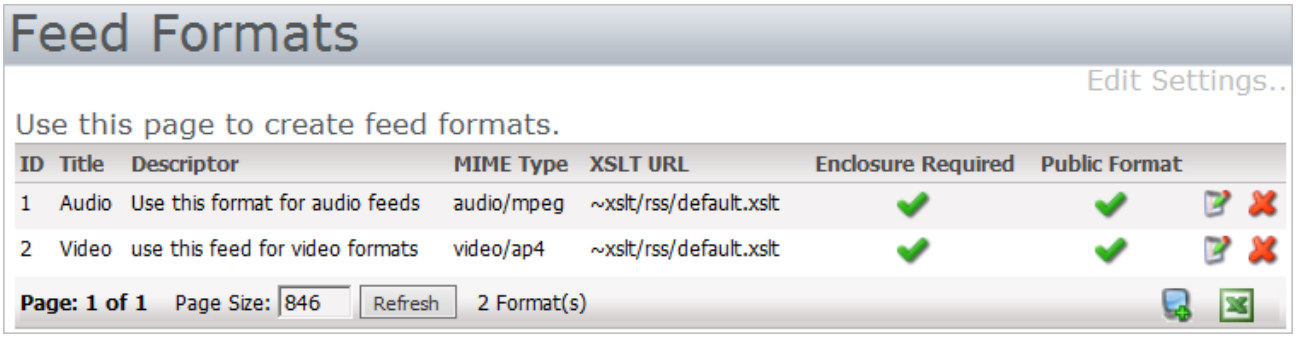


2. Complete all fields.
   - **Title** – This is the title for the feed format.
   - **Descriptor** – Enter an optional description for the feed format.
   - **MIME Type** – Enter MIME Type of the file type you want this feed to handle. The above example is set to audio/mpeg which is the MIME type for mp3 audio files.

- **Enclosure Required** - Choose whether to require Enclosure. RSS enclosures are a way of attaching multimedia content to RSS feeds by providing the URL of a file associated with an entry, such as an MP3 file to a music recommendation.
- **Public Format** – This check box determines whether this feed format is made available for public users to subscribe to.
- **XSLT URL** – Enter the URL for the xslt file that will setup the RSS feed. Arena comes with a basic default xslt file. In the example above, the relative path to the Arena default xslt file is shown.

3. Click the **Update** button.

4. Repeat all steps to add other feed formats.



5. Now you are ready to setup **Podcast Channels**.

Application URL / Public URL

Embedded email images need to be available on a public URL in order to be viewed by outside email clients. The following steps setup the areas of Arena that utilize the public URL paths.

The public URL is stored in five different areas of Arena that all work in concert with each other.

Organization Details

Organization Setting - ApplicationURLPath

Organization Setting - ProjectRoot

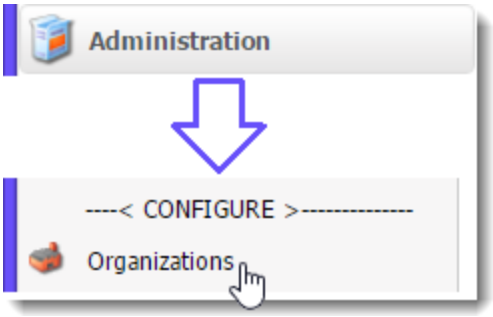
Web.Config File

AgentService.exe.config File

AgentConfiguration.exe File

Organization Details

1. From the **Administration** menu, select the **Organizations** option.



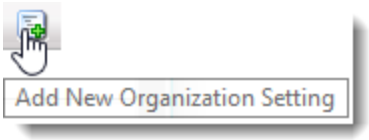
2. Select an organization by clicking on the ***Organization*** link.

3. Click the **Edit** button at the bottom of the organization details.

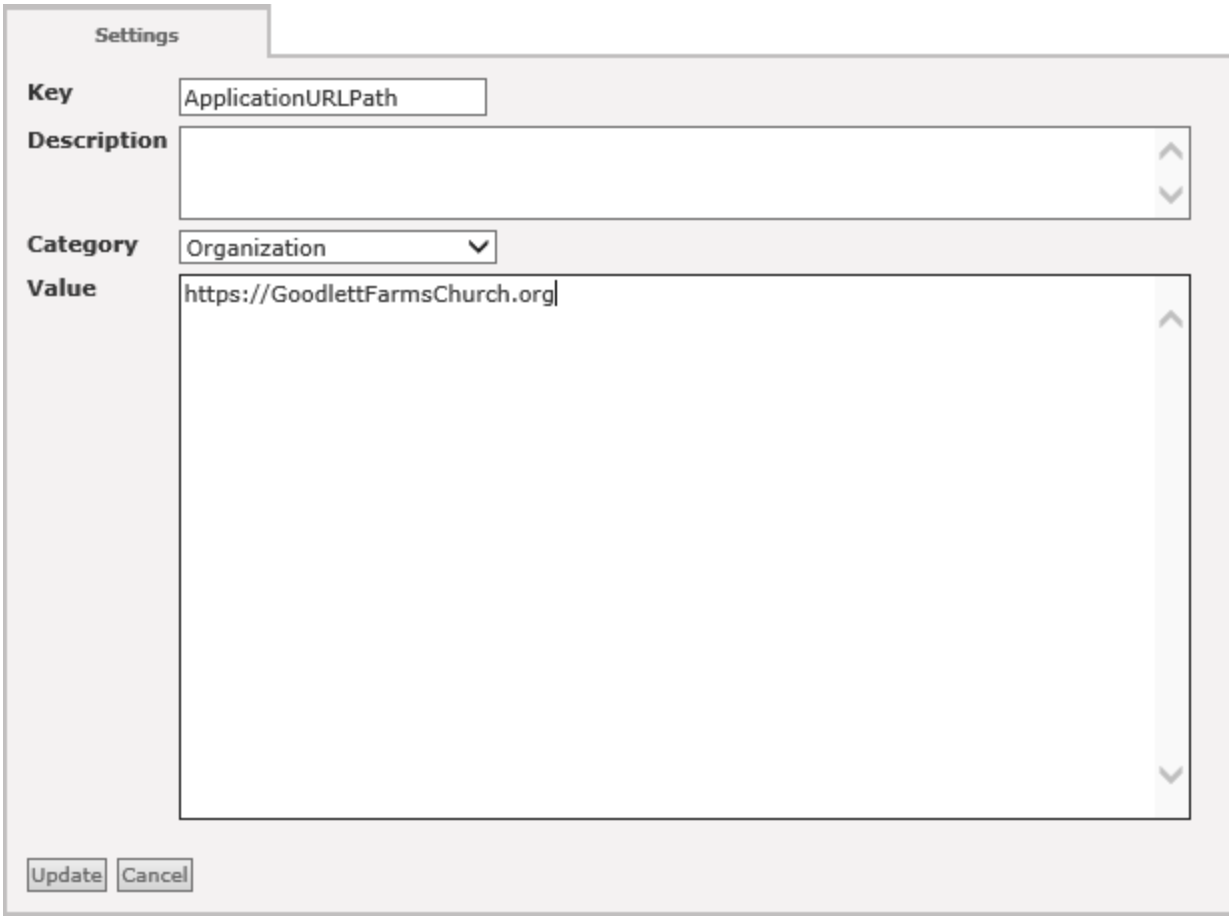
4. Insert your public URL in the **URL** field and then click the **Update** button.

Organization Setting - ApplicationURLPath

1. From the **Administration** > **Organizations** page, scroll to the bottom and click the **Add New Organization Setting** icon.



2. Enter "ApplicationURLPath" in the **Key** field and enter your public URL in the **Value** field. Click the **Update** button when you are finished.

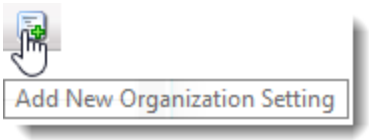


Organization Setting - ProjectRoot

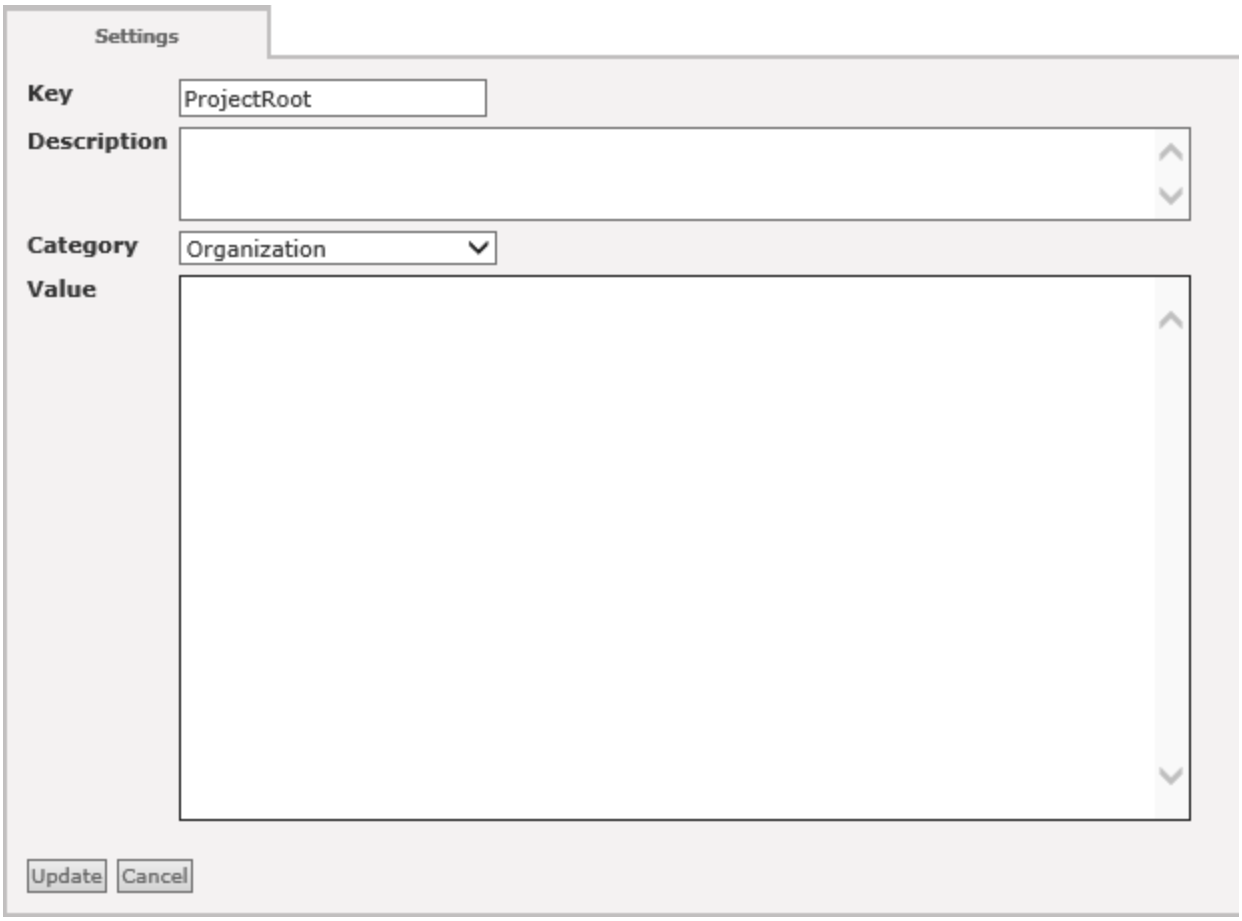
The value for the **ProjectRoot** setting is typically left blank. Both the ProjectRoot (or RootURL) use the value "arena" only if "/arena" is present in the URL.

1. From the **Administration** > **Organizations** page, scroll to the bottom and click the **Add New**

Organization Setting icon.



2. Enter "ProjectRoot" in the **Key** field and select "Organization" from the **Category** drop-down list. Click the **Update** button when you are finished.



Web.Config File

The **Web.Config** file is located on the server. Check with your network administrator to locate the file on the server. The default location of the file is "C:\Program Files (x86)\Arena ChMS\Arena".

Add the following keys:

<add key="ApplicationURLPath" value="https://goodlettfarmschurch.org/" />

<add key="ProjectRoot" value="" />

```
<!-- URL of application.  Used by classified, etc to format email messages with links back to images on site.  -->
<add key="ApplicationURLPath" value="https://goodlettfarmschurch.org/"></add>
<!-- Sync is used by the family class to determine if the entire family should be syncd on the family/person save. -->
<add key="sync" value="false"></add>
<add key="ProjectRoot" value=""></add>
<add key="PublicUrl" value="https://goodlettfarmschurch.org/"></add>
```

AgentService.exe.config File

The **AgentService.exe.config** file is located on the server. Check with your network administrator to locate the file on the server. The default location of the file is "C:\Program Files (x86)\Arena ChMS\Arena Automation Agents".

Add the following keys:

<add key="ApplicationURLPath" value="https://goodlettfarmschurch.org/" />

<add key="ProjectRoot" value="" />

```
<!-- URL of application.  Used by classified, etc to format email messages with links back to images on site.  -->
<add key="ApplicationURLPath" value="https://goodlettfarmschurch.org/" />
<add key="ProjectRoot" value="" />
```

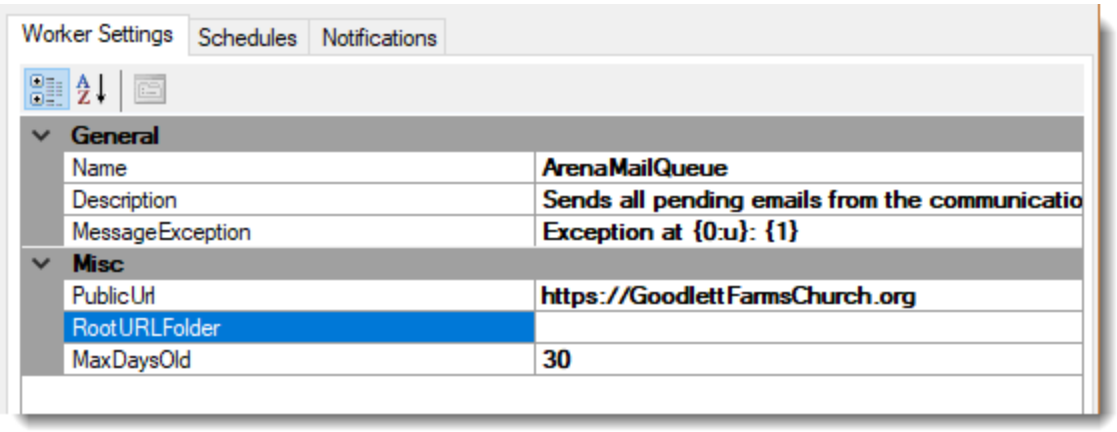
AgentConfiguration.exe File

The **AgentConfiguration.exe** file is located on the server. The default location of the file is "C:\Program Files (x86)\Arena ChMS\Arena Automation Agents".

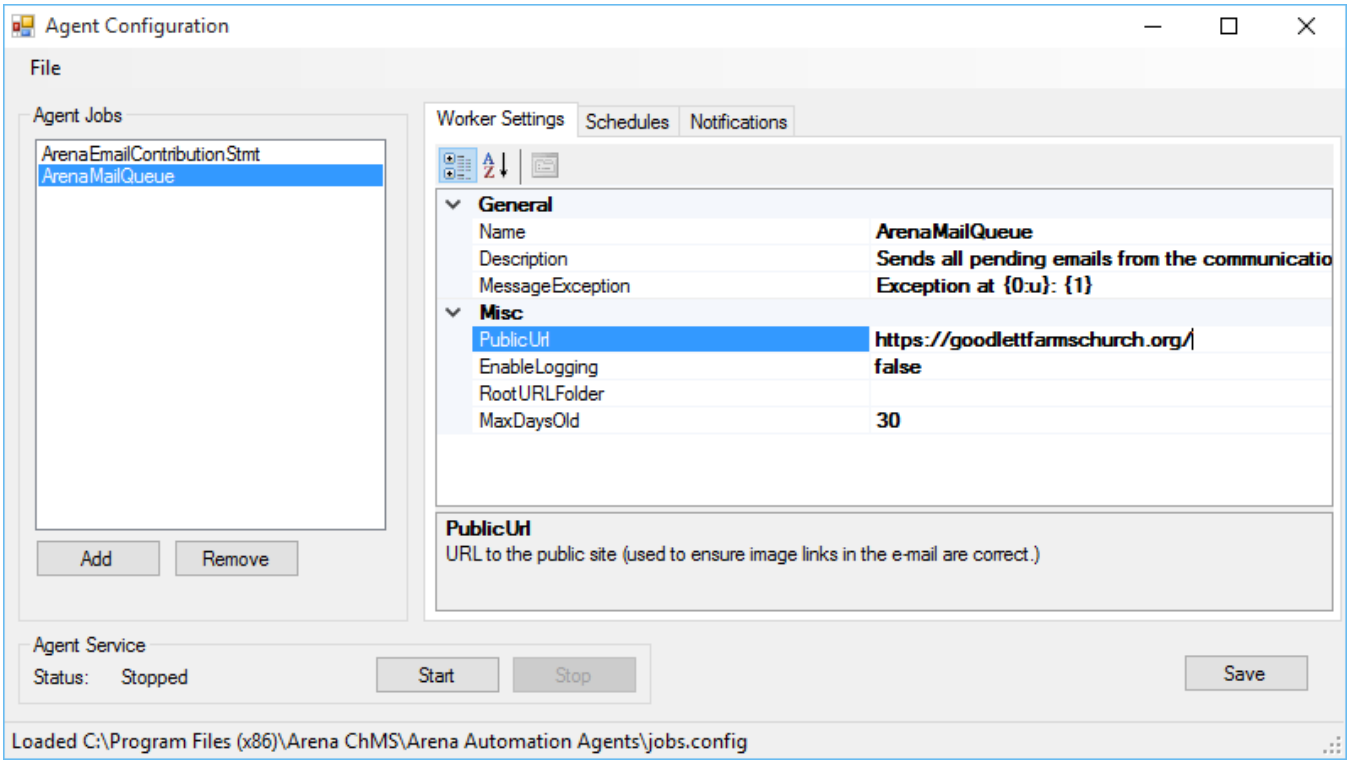
1. Locate the **AgentConfiguration.exe** file using Windows Explorer and then right-click and select the **Run as administrator** option.

2. Select the **ArenaMailQueue** agent job listed under the Agent Jobs frame.

3. Make the following changes in the **Worker Settings** tab under the **Misc** section.
   - Enter your public Url in the **Public Url** field.
   - Leave the **RootURLFolder** field blank unless "/Arena" is in your URL path, then enter "Arena" in the RootURLFolder field.
   - Enter "30" in the **MaxDaysOld** field.



4. Click the Save button.
5. In order for the settings to take place you will need to stop and start the agent service. Click the Stop button. When the agent service has stopped, click the Start button.



6. Once these values are put into place, the settings saved, and the site/agents refreshed, Arena should begin using the new URL.

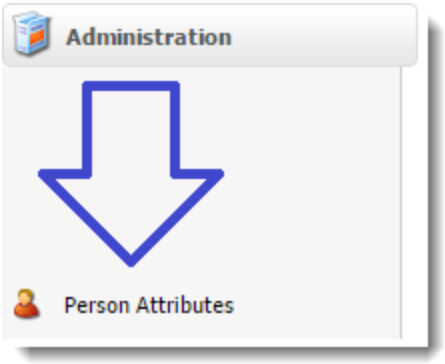
Customizing Arena

A unique feature of Arena is your ability to customize it to meet your organization's needs. You can customize screen layouts, user level security rights, field names, field groups, templates, and web pages. You can also add custom fields as needed.

Interface with other Arena users through the Arena Developer Community for higher levels of customization.

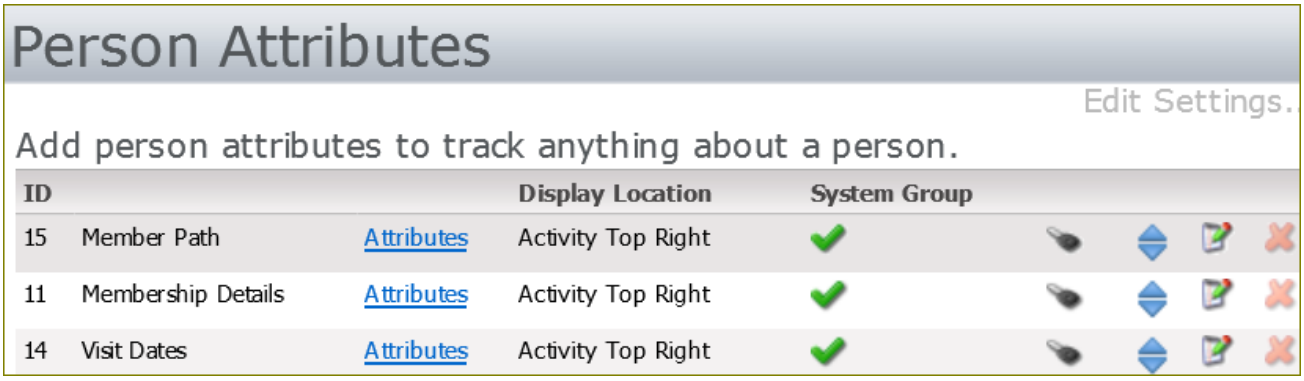
Person Attributes

Person Attributes are data fields that display on the **Person Detail** page and display in Person Attribute 'groups.' Attribute fields can record several types of data, including numerical values, date values, string (text) values and uploading documents. Person Attribute fields can be made available in My and Public Lists so staff can query Arena easily.



Many Person Attributes are core so they cannot be deleted. However, you can edit Person Attributes, including turning off ones your organization does not use.

You can also add new Person Attributes. Before adding new Person Attribute Groups, determine the location of the Person Attribute Group. There are four available display locations on the Individual Information tab of the **Person Detail** page where you can add Person Attribute Groups - the Profile section which is located in the top portion, the Activity section where Sections, Tags and Member Data display, the Attendance section or the Personality section. For converted data where Person Attributes are created, be sure the Person Attributes are set to display and security has been applied as desired.



All Person Attribute groups have system IDs.

Person Attribute fields are organized by Attribute Groups. This name displays on the **Person Detail** page for the Person Attribute group.

- Click the ***Attributes*** link to display the values of Person Attribute group.
- The **Display Location** reflects where the Person Attribute group displays on the **Person Detail** page.
- The **System Group checkmark** icon reflects if the attribute is core. You cannot delete system groups but you can elect not to display by setting the Display Location to None. Also, you can elect to customize system attributes instead of creating new ones.
- Click the **Security** icon to make security permission changes for the Person Attribute group. Security applies to the group only, not the fields in the group. Changes you make also reflect in Security Roles.
- Click and hold the **Reorder** icon to move the attribute groups to the desired order. Keep in mind the order is applied by Display Location.
- Click the **Edit** icon to edit an attribute group name and display location.
- Click the **Delete** icon to delete an attribute. To delete an attribute, you must first remove it from all records.

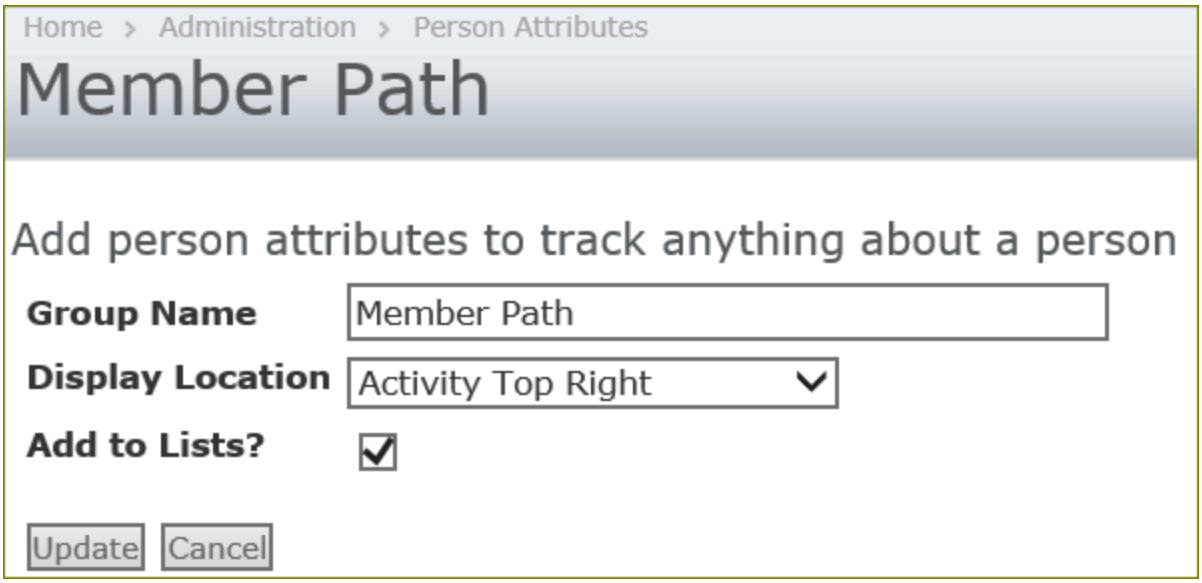
Customize a Person Attribute

You can also add a new Person Attribute. The only exception in the below steps is to add new fields. After adding new Person Attribute Groups, you likely want to add these to List Criteria for staff to use the criteria to create Lists.

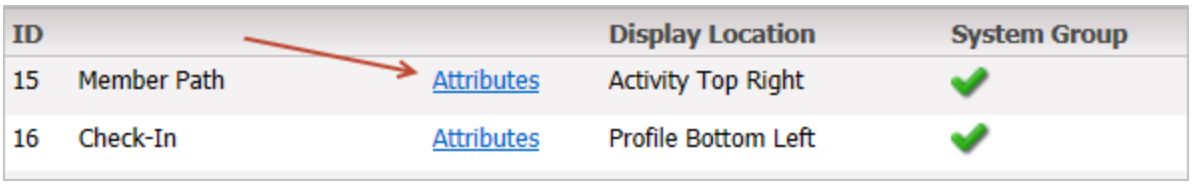
1. Click the **Edit** icon.

ID			Display Location	System Group
15	Member Path	Attributes	Activity Top Right	✔
16	Check-In	Attributes	Profile Bottom Left	✔

- Customize the name or location.
- Select the **Add to Lists** check box to add this attribute group to the available List criteria. You also need to add the individual Person Attribute Group fields you want to be available.



2. Click the **Update** button.
3. Click the ***Attributes*** link for Person Attribute group to display available fields.

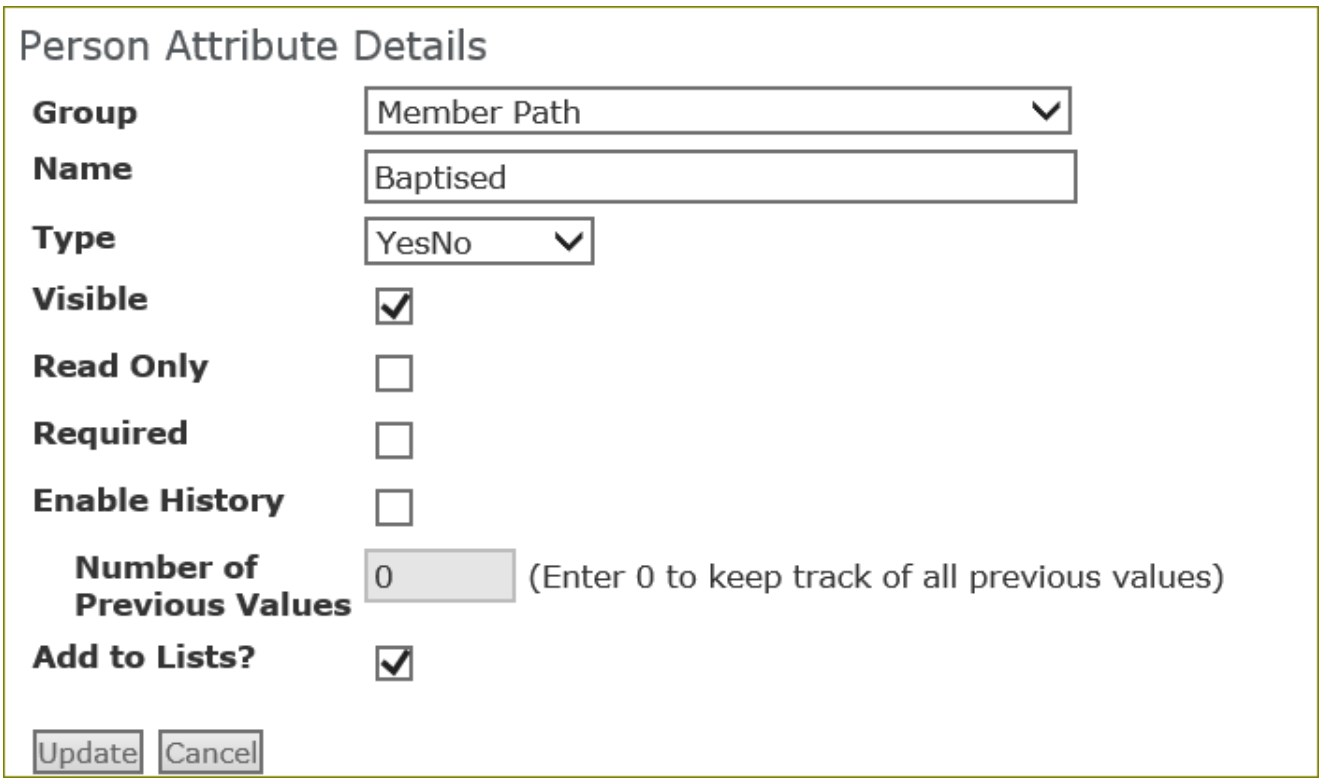


ID			Display Location	System Group
15	Member Path	Attributes	Activity Top Right	✔
16	Check-In	Attributes	Profile Bottom Left	✔

4. Click the ***Attribute Name*** link of the attribute you want to change.

ID	Name	Type	Qualifier	Visible	Read Only	Required	History	Previous Values	System Attribute
64	How Received	Lookup	How Received	✔			✔	5	✔
65	Date Received	DateTime		✔					✔
66	Infant Baptist	DateTime		✔					✔
67	Staff Anniversary	DateTime		✔					✔
68	Marriage Date	DateTime		✔					✔
69	Ordination Date	DateTime		✔					✔
70	Date Entered	DateTime		✔					✔

5. Make desired changes.



- **Group** – This is the attribute group to which the attribute belongs. Changing this moves this Attribute to a different Attribute Group.
- **Name** – Enter the name of the field, such as How Received, Uniform Size, Background Check, etc. The name of an Attribute can be up to 125 characters.
- **Type** – Choose the type of field. Options are:
- **Integer** – This allows the user to enter a numerical value.
- **String** – This allows the user to enter text.
- **DateTime** – This allows the user to enter a date or use the calendar lookup to select a date.
- **Lookup** – This option enables you to select an existing lookup type.
- **YesNo** – This allows the user to select a check box for yes.
- **Decimal** – This allows the user to enter a decimal value.
- **Currency** – This allows the user to enter currency values.
- **URL** – This allows the user to enter a HTTP link that opens a new web browser tab to that link.
- **Document** – This allows the user to upload a document. A Document Type is required.
- **Visible** – Select this option to display this Attribute with the Person Attribute Group. Remove

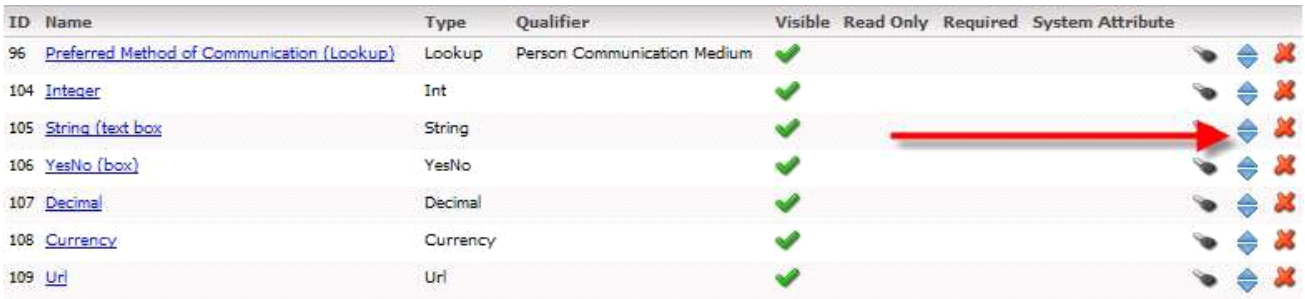
the checkmark to turn off system values that your organization does not use.

- **Read Only** – Select this option for the attribute to display only and not editable.
- **Required** – Select this option to require the user to update the attribute when editing the attribute group.
- **Enable History** – Select this option to enable Arena to keep the history as users change the value. A value in the Number of Previous Values is required.
- **Number of Previous Values** – Enter the number of values you want to track.
- Select the **Add to Lists** check box to add this person attribute field as available list criteria.

6. Click the **Update** button.

7. Repeat steps 7 through 13 for each Attribute for this Attribute Group.

As you add attributes, click and hold the **Reorder** icon to move each attribute to the desired position.



Set security for the Attribute Groups and each Attribute. You can also set security through Security Role Permissions. Users need **View** and **Edit** permission to the Attribute Group in order to edit any field associated with the Group.

Attribute Group Security

Attribute Security

On the **List Configuration** page, you can make the new attributes available for users to select as criteria for My and Public List.

Optionally, customize White Pages to display attributes on the **Membership** menu **White Pages** option.

Delete an Attribute

While you cannot delete system Person Attributes, you can delete non-system Person Attributes that are not used on either the **Person Detail** page or Lists. If you want to delete Person Attributes that have been used, first remove the values for each field. Use Lists to query where fields are used. Once you remove the use of all values, you can proceed with turning off the values in Lists and then delete the Person Attribute.

1. From the **Administration** menu, click the **List Configuration** option located under the CONFIGURE heading.

2. Click the ***Attribute Controls*** link for Person List.

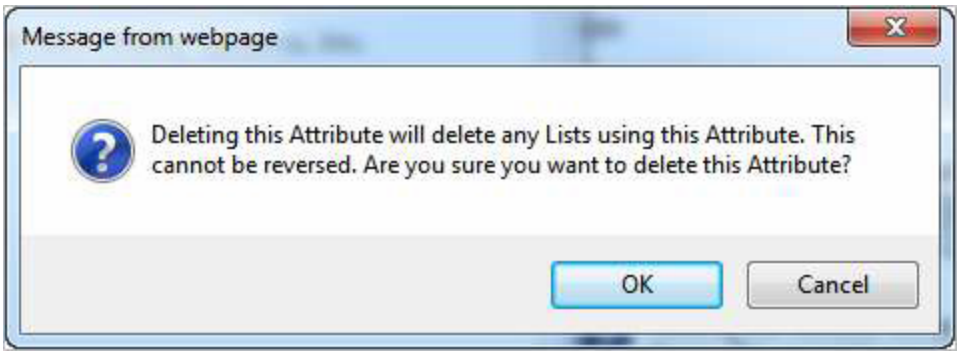
3. Uncheck the specific attribute(s) and person attribute group.

4. From the **Administration** menu, click the **Person Attributes** option located under the CUSTOMIZE heading.

5. Click the ***Attributes*** link of the desired Person Attribute.

6. Click the **Delete** icon to delete the attribute you want to remove.

7. A notification window displays.



8. Click the **OK** button. Arena deletes any lists using the attribute.

Application Settings

From the **Administration** menu, click the **Application Settings** option located under the CONFIGURE heading. Select the Application to edit from the drop-down options.

Check-In Application

Set values for the following settings:

- Fingerprint Scanner
- General Settings
- POS Scanner
- Screen Size
- Security

Under the General Settings, the "Allow Other Keyboards" default setting is True for Apple products on iOS8. If the default value is set to False then the only input allowed for the phone number is the embedded keyboard.

Contributions Application

Set values for the following settings:

- Attendance Processing
- Check Scanner
- General Settings

Family Registration

Set values for the following settings:

- General Settings
- Printer

Mailing

- Contribution Report Documents
- Merge Documents
- Satori Mailroom

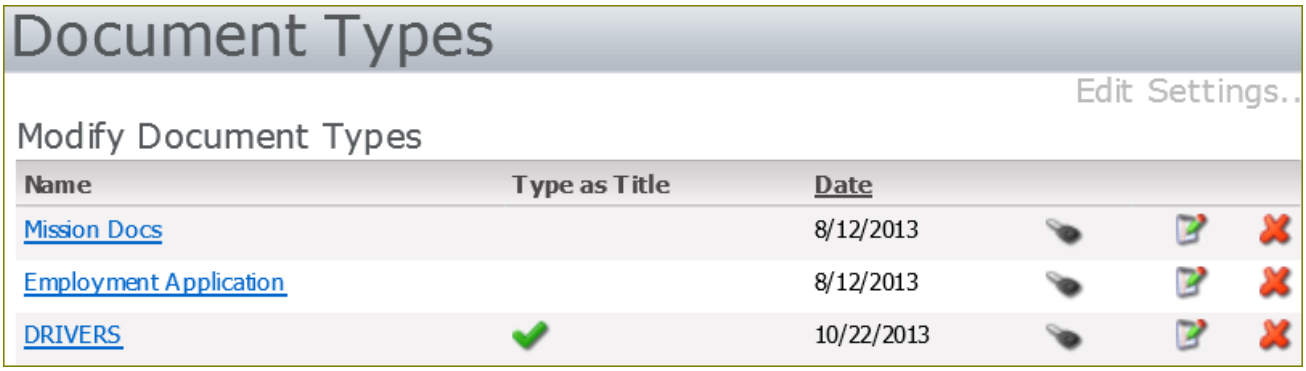
Document Types

Users can upload documents to the **Person Detail** page, a Tag, a Group, a Mission Trip or an Assignment. In order to upload a document, a document type must exist to associate the uploaded document. Each document type can be secured by security role or by individual user. In order to add a document to Arena, at least one Document Type must be created.

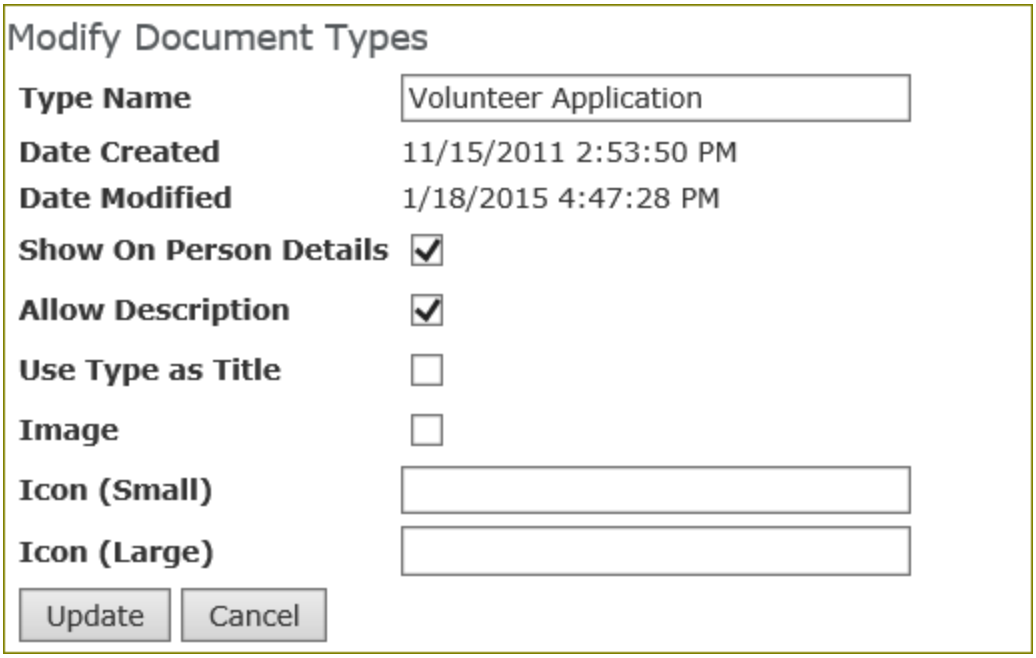
Create a Document Type

1. From the **Administration** menu, click the **Document Types** option located under the CONFIGURE heading.

2. Click the **Add New Document** icon.



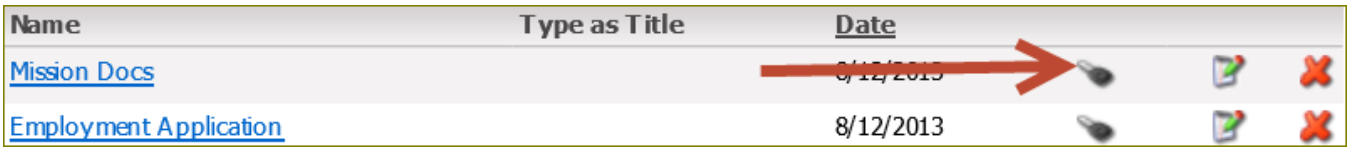
3. Complete the following fields:



- **Type Name** – Enter a name for this Document Type.
- **Show on Person Details** – Select this check box if this document type is to be available on the **Person Detail** page. This requires a Document type Person Attribute on the **Person Detail** page.
- **Allow Description** – Select this check box to allow users the ability to enter a description for uploaded documents for this document type.
- **Use Type as Title** – Select this check box to use the Type Name as the document title, otherwise the original document name is the title.
- **Image** – Select this check box to allow users the ability to upload an image for the document. Path must be in the following format: ~/Images/file.ext.
- **Icon (Small)** – If the image box is selected, enter the file path to the thumbnail image. The source file must exist in the Images folder in the Arena code folder on the Web Server.
- **Icon (Large)** – If the image box is selected, enter the file path to the large image. The source file must exist in the Images folder in the Arena code folder on the Web Server.

4. Click the **Update** button.

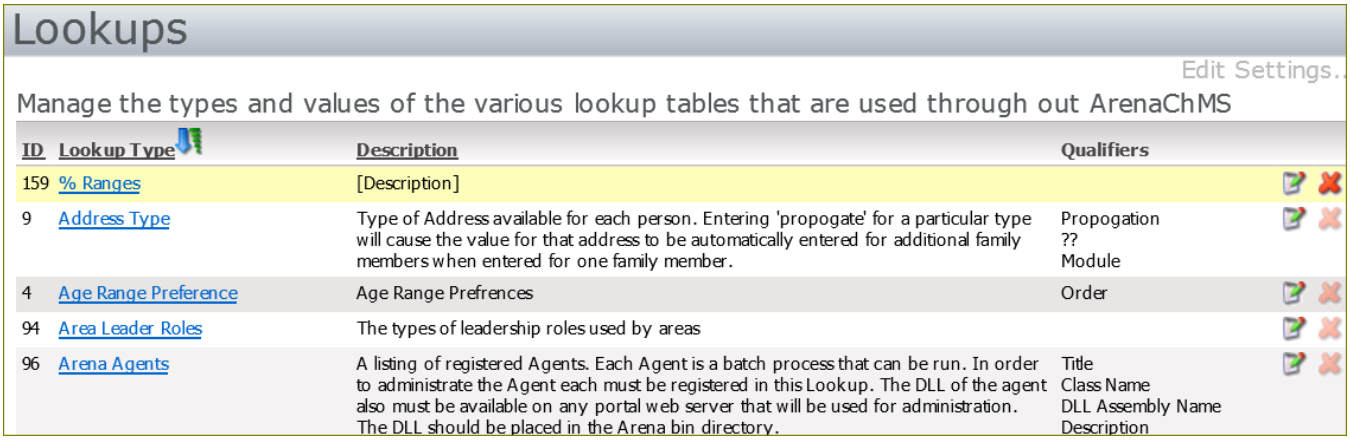
5. Click the **Security** icon to set security.



Lookups

Most drop-down lists in Arena are Lookups and most are customizable. You can also add new Lookups. As you customize various features in Arena, review and customize all associated Lookups with the particular feature.

All Lookups are listed on the **Lookup** page. Adjust page size to display all Lookups on one page. The default view sorts Lookups in alphabetical order by Lookup Type name. Click the ID or Lookup Type column heading to sort by either heading.



Lookups

Edit Settings...

Manage the types and values of the various lookup tables that are used through out ArenaChMS

ID	Lookup Type	Description	Qualifiers
159	% Ranges	[Description]	
9	Address Type	Type of Address available for each person. Entering 'propogate' for a particular type will cause the value for that address to be automatically entered for additional family members when entered for one family member.	Propogation ?? Module
4	Age Range Preference	Age Range Prefrences	Order
94	Area Leader Roles	The types of leadership roles used by areas	
96	Arena Agents	A listing of registered Agents. Each Agent is a batch process that can be run. In order to administrate the Agent each must be registered in this Lookup. The DLL of the agent also must be available on any portal web server that will be used for administration. The DLL should be placed in the Arena bin directory.	Title Class Name DLL Assembly Name Description

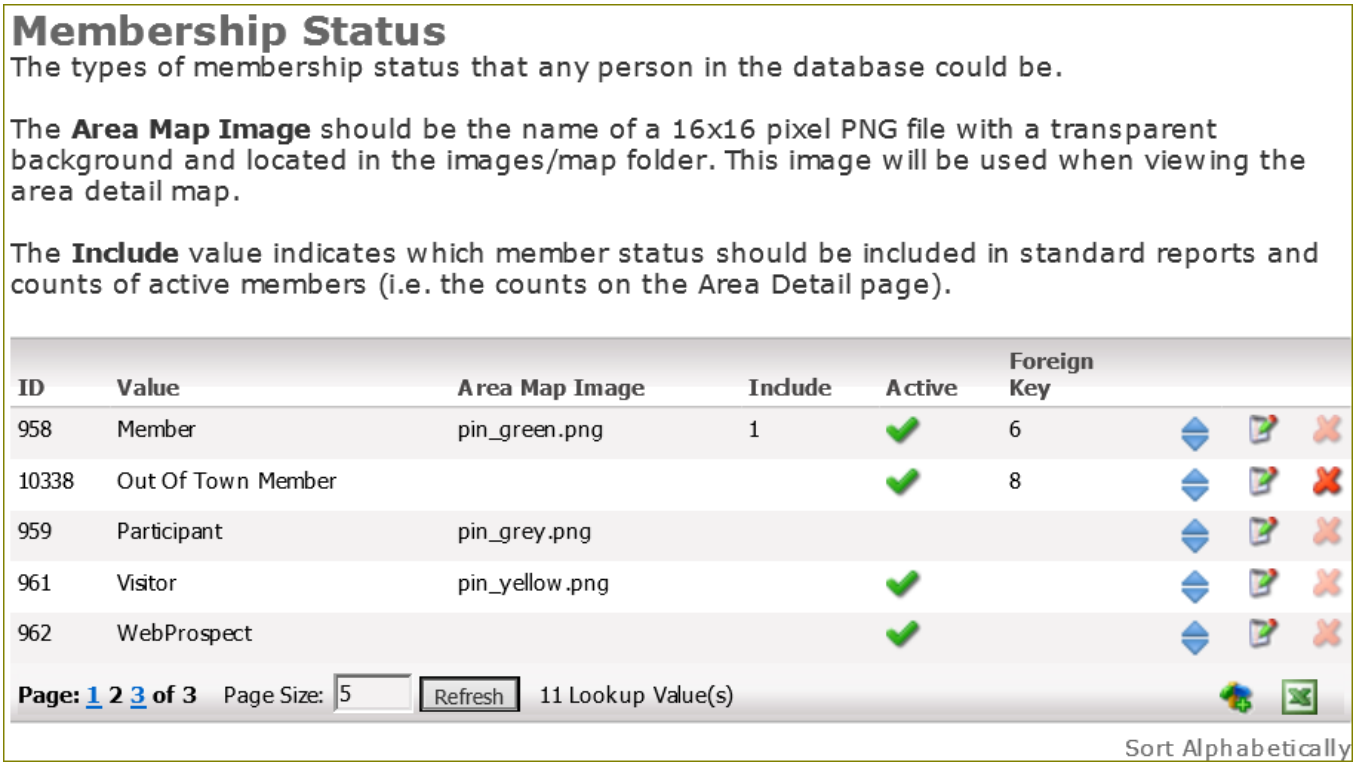
- **ID** – This is the identification number for the Lookup Type.
- **Lookup Type** – This is the name of the lookup. Click the ***Lookup Type*** link to view available values.
- **Description** – This is the description for the lookup. Descriptions for the default lookup provide you information as to where and how the lookup is used.
- **Qualifiers** – This is an optional qualifier setting.

Click the **Edit** icon to edit the name, description or qualifiers.

Click the **Delete** icon to delete the lookup type. You cannot delete Lookup Types that are in use or are core. However, you can turn off core Lookups that your organization does not plan to use.

Lookup Type Values

All Lookup Types have values. The values are the options users can select where the Lookup is used. It is common to review and customize default Lookup Type Values. Let's take a closer look at one of the more common Lookups, Membership Status. Some Lookups have additional fields; all Lookups have IDs, Values, Reorder options, edit and delete.



Membership Status

The types of membership status that any person in the database could be.

The **Area Map Image** should be the name of a 16x16 pixel PNG file with a transparent background and located in the images/map folder. This image will be used when viewing the area detail map.

The **Include** value indicates which member status should be included in standard reports and counts of active members (i.e. the counts on the Area Detail page).

ID	Value	Area Map Image	Include	Active	Foreign Key
958	Member	pin_green.png	1	✔	6
10338	Out Of Town Member			✔	8
959	Participant	pin_grey.png			
961	Visitor	pin_yellow.png		✔	
962	WebProspect			✔	

Page: 1 2 3 of 3 Page Size: 5 Refresh 11 Lookup Value(s)

Sort Alphabetically

- **ID** – This is the identification number for the Lookup value.
- **Value** – This is one of the options in the lookup drop-down.
- **Active** – The **Checkmark** ✔ icon indicates the lookup is available.

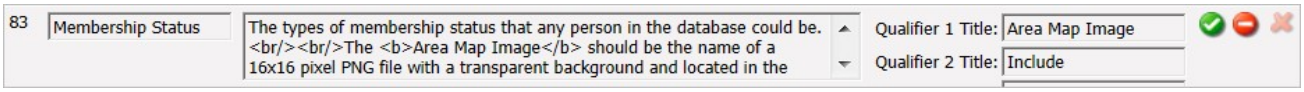
Click and hold the **Reorder** icon to move values in the desired order. Values in the first position are listed first in the drop-down list. Click the ***Sort Alphabetically*** link to sort all values by alpha/numeric order.

Click the **Delete** ✘ icon to delete the lookup. While you cannot delete core Lookups, you can make lookups inactive.

Edit a Lookup Type and Lookup Value

You can edit Lookups at any time. Features using the lookup reflect any changes.

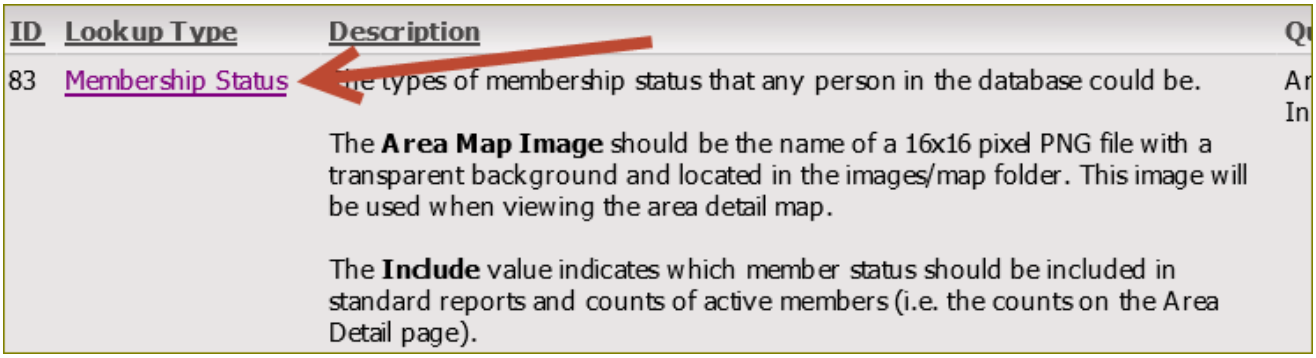
1. Click the **Edit** icon of the lookup type to edit the lookup name.



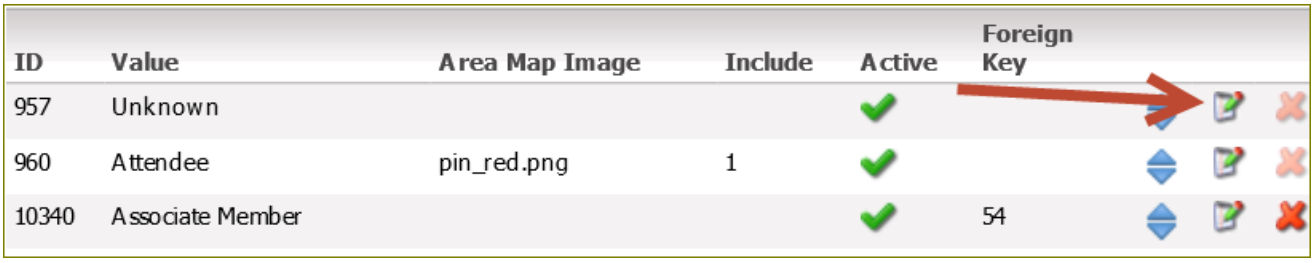
2. Make desired changes.

3. Click the **Update** icon.

4. Click the ***Lookup Type*** link to edit the values.



5. Click the **Edit** icon of the value you want to change.



6. Make desired changes.

7. Click the **Update** icon to save changes.

Create New Lookups to use with Person Attributes

You can use alpha and numeric characters when creating new lookups. Do not use special characters.

1. Click the **Add New Lookup Type** icon at the bottom. This adds a new lookup type called [New Lookup Type] as a placeholder.

2. Click the [New Lookup Type].

3. Complete all desired fields. Override the default [New Lookup Type] name.

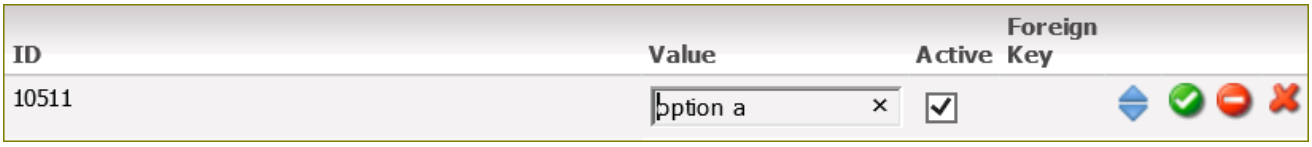
- **ID** – This number is the field identification number Arena assigns.
- **Lookup Type** – This is the name of the lookup type.
- **Description** – Enter a description for this Lookup Type such as, what kind of values this type holds.
- **Qualifiers** – This option can perform certain tasks when the value is used. Typical user-created values do not have any qualifiers, but you can use them for reporting purposes to group multiple values together.

4. Click the **Save** icon to save your changes. The new Lookup Type now displays in alphabetical order on the **Lookup Type** page. Click the **Cancel** icon to close without saving your changes. Click the **Delete** icon to delete the Lookup Type.

5. Click the new **Lookup Type** to add values for the Lookup.

6. Click the ***Add*** link.

7. Enter lookup value and mark the value as **Active**.



8. Click the **Update** icon.

9. Repeat all steps for each Lookup. After you create the first lookup, the **Add Lookup** icon moves to the bottom right corner.

10. Change the order of the values, as desired.

Custom Field Groups

Custom Field Groups are a predefined collection of custom fields Arena Administrators can create for use with Groups, Tags, Assignments and Mission Trips. (You can edit Custom Field Groups only on this page. Users are not able to edit the fields.)

Create Custom Field Groups

1. From the **Administration** menu, click the **Custom Field Groups** option located under the CUSTOMIZE option.

2. Click the ***Add*** link. Arena creates a New Field Group placeholder.

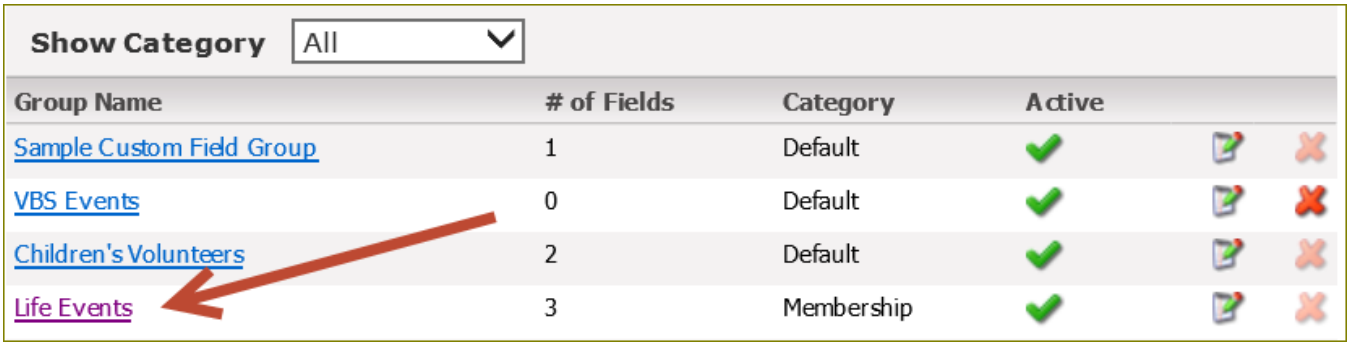
3. Click the **Edit** icon for the new Custom Field Group.

4. Enter a **Group Name** for this custom field group. Users select this group name.

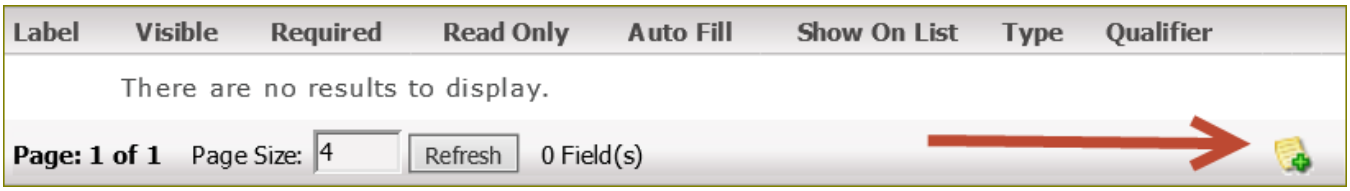
5. Select a **Category**. You can customize this Custom Field Module Category Lookup.

6. Click the **Update** icon to save.

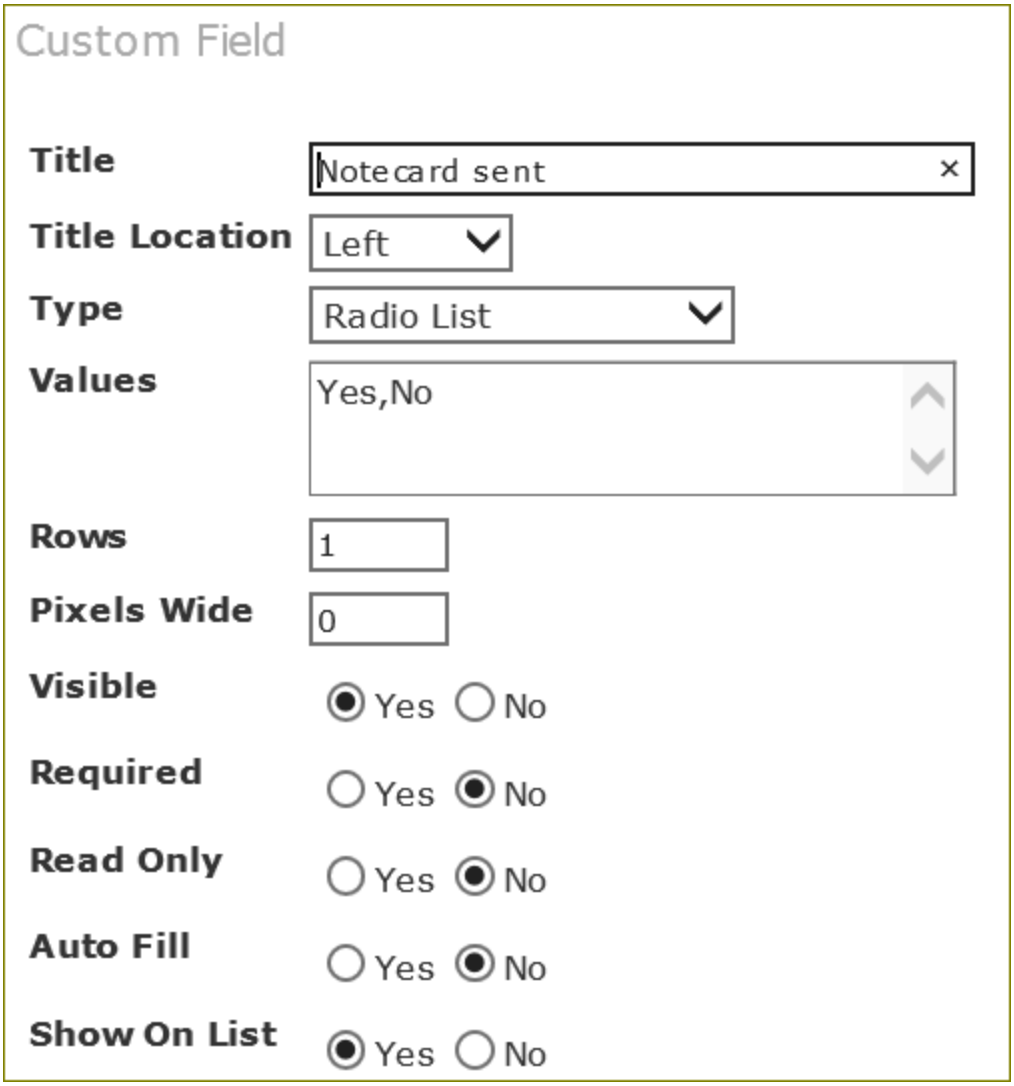
7. Click the ***Name*** link of the new Custom Field Group.



8. Click the **Add New Field** icon to create a field.



9. Complete fields, as desired.



- **Title** – Enter the name for this custom field.
- **Title Location** – Select where to display the field. Options are left, right, top, bottom, and none.
- **Type** – Select a field type. Options are:
- **Address** – This field gives users the ability to enter an address.
- **Area** – This field enables you to select an available Group Area. You can create Areas in Groups.
- **Check Box** – This field gives you the ability to create a multi-select list of options for users. Enter values in comma-delimited format in the Values box that displays below the Type drop-down.
- **Custom Query** – This field gives you the option to enter a custom SQL query.
- **Date** – This field creates a date field for users to enter a date.
- **Document** – This field gives users the ability to attach a document. You must create at

least one Document Type for this field to be available. Refer to Document Types.

- **Drop-down List** – This field gives you the ability to create a drop-down list of options for users to select. Enter values in comma-delimited format in the Values box that displays below the Type drop-down list.
- **Image** – This field enables users the ability to upload an image.
- **Lookup Type** – This field gives you the option to select from existing Lookups.
- **Person** – This field gives users the ability to search for a single existing record. Person Page ID is "7."
- **Person Attribute**: This field links to person attribute on the person detail page.
- **Phone Number** – This field gives users the ability to enter a 10-digit telephone number with the option to enter an extension.
- **Radio List** – This field gives you the ability to create a single-select radio list of options for users. Enter values in comma-delimited format in the Values box that displays below the Type drop-down list.
- **Rich Text Field** – This field enables the ability to enter rich text.
- **Static HTML Content** – This field enables the ability to enter static content, with the option to use HTML code/formatting.
- **Textbox**- This field gives users the ability to enter text.
- **Rows** – Use to expand height area for fields; enables word wrapping for the number of entered rows.
- **Pixels Wide** – Use this option to adjust the width of the custom field, especially when using multi-select check box, radio list, and static HTML Content.
- **Visible** – Select the **Yes** radio button to make the field visible.
- **Required** – Select the **Yes** radio button to make fields required.
- **Read Only** – Select the **Yes** radio button to indicate fields that are view only. This makes the field display as a disabled field (grayed out). This is good to use with a Static HTML field.
- **Enable Auto-Fill** – Select the **Yes** radio button for the field to auto-populate, using existing Arena data. This option is for fields behind a login.
- **Show on List** – Select the **Yes** radio button to display the fields on the page where used. For example, if the Custom Field Group is used for a Tag or Group, field(s) display on the **Members** tab page.

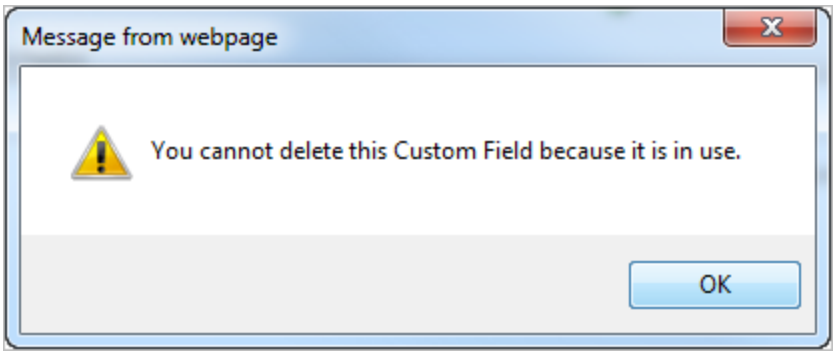
10. lick the **Update** button.

11. Repeat steps 8 and 9 for all fields you want to add to the Custom Field Group.

Delete a Custom Field and Custom Field Group

To remove where a custom field(s) is used:

1. From the **Administration** menu, click the **Custom Field Groups** option located under the CUSTOMIZE heading.
2. Select the Custom Field Group.
3. Identify the custom field you want to delete.
4. Click the **Delete** icon to delete the field. If any field is in use, Arena displays the message below. You need to remove all areas where the field is used.



5. Go back to the **Administration** menu and click the **Custom Field Groups** option located under the CUSTOMIZE heading.
6. Click the **Delete** icon to delete for the Custom Field Group once you delete all associated fields.

Relationship Types

Use Relationship Types to identify relationships outside of the immediate family such as

grandparents, adult siblings, adult child/parent, step parent/step child, deceased family spouse/living spouse, etc. You can even identify non-family members such as people approved to pick up and drop off children. There are no default relationship types, which provide you the opportunity to design all relationship types to fit your organization.

As you evaluate the types of relationship types to create for your organization, below are some factors to consider:

Every relationship requires a reciprocal relationship (e.g., grandparent/grandchild, sibling/sibling, non-custodial parent/non-custodial child, foster parent/foster child, etc.)

If you plan to use Arena Check-In, consider creating a “Can CheckIn” relationship type to identify records outside of the immediate family who can checkin (or check out) the designated child. "Can checkin" is case insensitive and does not require quotes. The Relationship Type could be a standalone Relationship Type or one that includes the required text. Be sure to create a reciprocal relationship type such as cannot checkin.

To avoid possible duplication, consider not using gender specific relationship types such as grandfather/grandchild.

ID	Relationship	Inverse Relationship
37	Grandparent	Grandchild
38	Grandchild	Grandparent
39	Aunt/Uncle	Niece/Nephew
40	Niece/Nephew	Aunt/Uncle
41	Non-Custodial Parent	Non-Custodial Child
42	Non-Custodial Child	Non-Custodial Parent
43	Foster Parent	Foster Child
44	Foster Child	Foster Parent
45	Can Checkin	Cannot Checkin
46	Cannot Checkin	Can Checkin

Add Relationship Types

1. From the **Administration** menu, click the **Relationship Types** option located under the CUSTOMIZE option.

2. Click the ***Add*** link.

3. Enter a **Name** for this Relationship. The first Relationship Type does not have an **Inverse**.

The first relationship you enter has no Inverse Relationship, so leave the inverse blank. After you create at least one Relationship Type, you can select it as the inverse of the second one you create. Each Type can only have one Inverse. Each Relationship Type can have one inverse.

4. Set the **Relationship Strength**, as desired.

5. Add another **Relationship Type**.

6. Select the **Inverse Relationship**. This is likely be the Relationship Type you previously created.

7. If using Peer Network, set the **Relationship Strength**. Move the strength bar to the desired position. If the strength bar is not moved from the far left position, Arena does not calculate this Relationship.

8. Click the **Update** button.

Peer Types

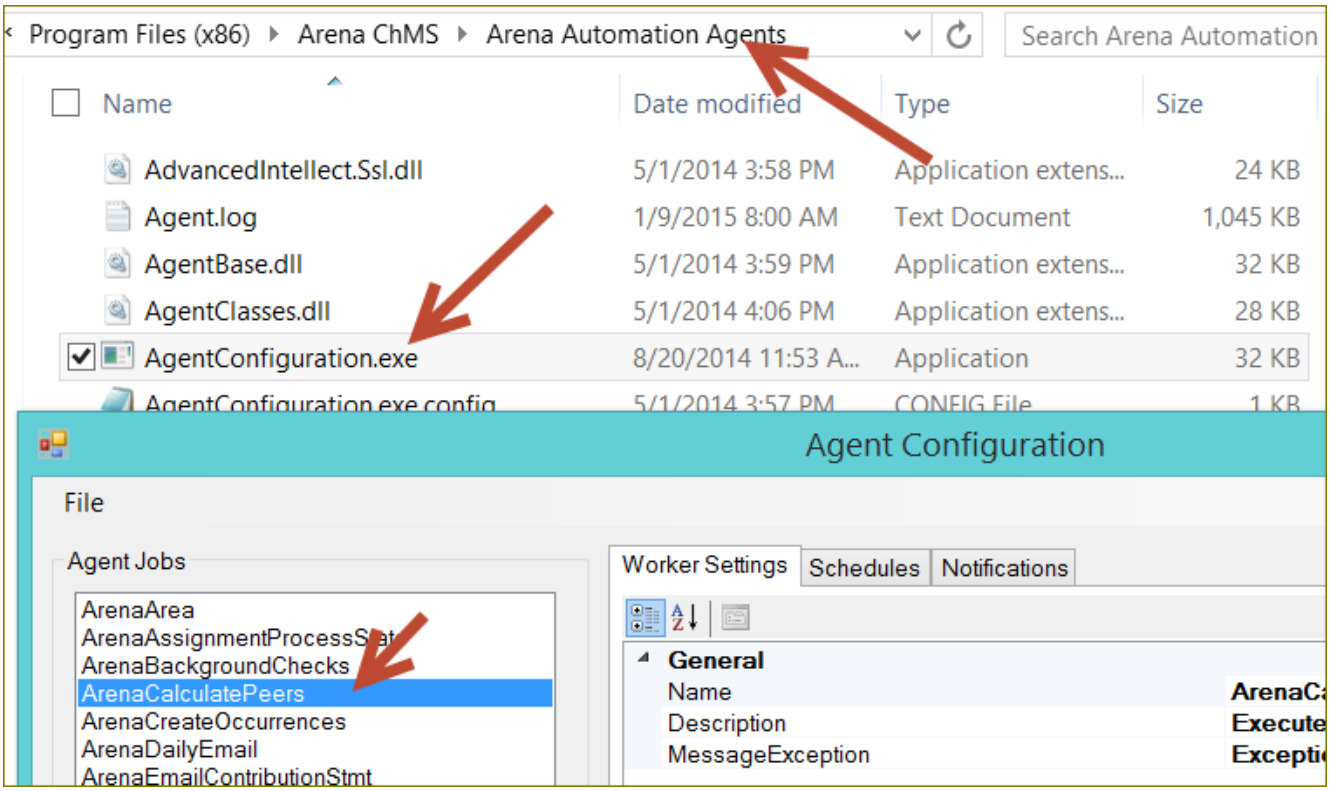
Peer Network on the **Person Detail** page represents a connection between people in Arena based on the individuals being in the same Group, Tag or Relationship Type. The Peer Network value displays on the person detail page with the individual's name, score, and an up or down trend. The larger the numerical value represents a stronger connection. (The Arena Calculate Peer Agent must be running prior to using peer network.)

Arena has five separate peer type stored procedures. You can configure each one separately.

- **Relationship Types** – Use this Peer Type to calculate strength for Relationship Types.

- **Group Leaders** – Use this Peer Type to calculate strength for Group Members and the Group Leaders.
- **Group Peers** – Use this Peer Type to calculate strength for Group Members.
- **Tag Owners** – Use this Peer Type to calculate strength for Tag Members and Tag Owners.
- **Tag Peers** - Use this Peer Type to calculate strength for Tag Members.

Before creating the individual peer types, start the **Calculate Peers Agent**.



Create Peer Types

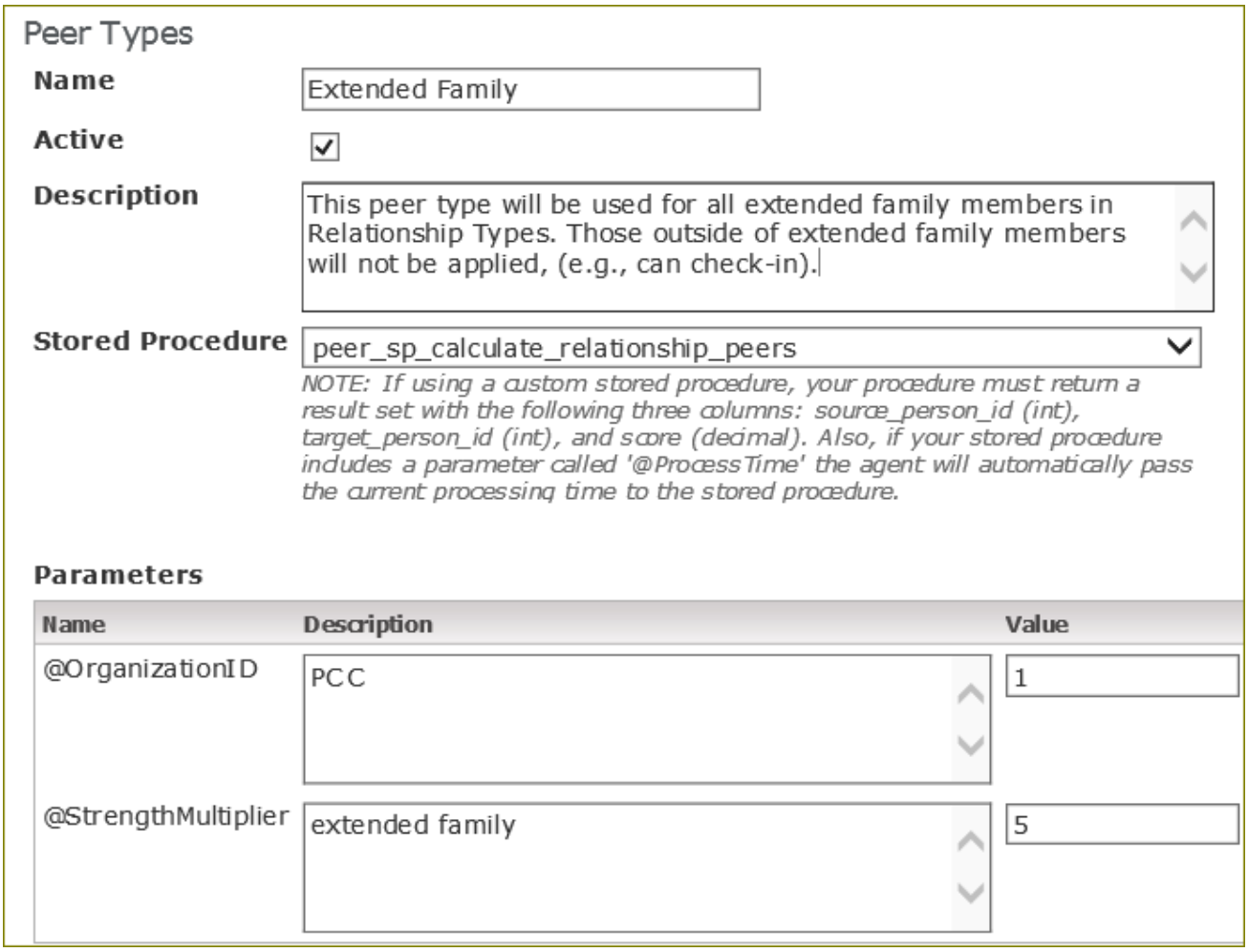
1. From the **Administration** menu, click the **Peer Types** option located under the CUSTOMIZE heading.
2. Click the ***Add*** link.
3. Enter a **Name** for the peer type.
4. Select **Active** if not already selected.

5. Enter a **Description**.

6. Select a peer network **Stored Procedure**. The list of available stored procedures includes both default and custom stored procedures.

7. Enter **Organization description** and **ID #**.

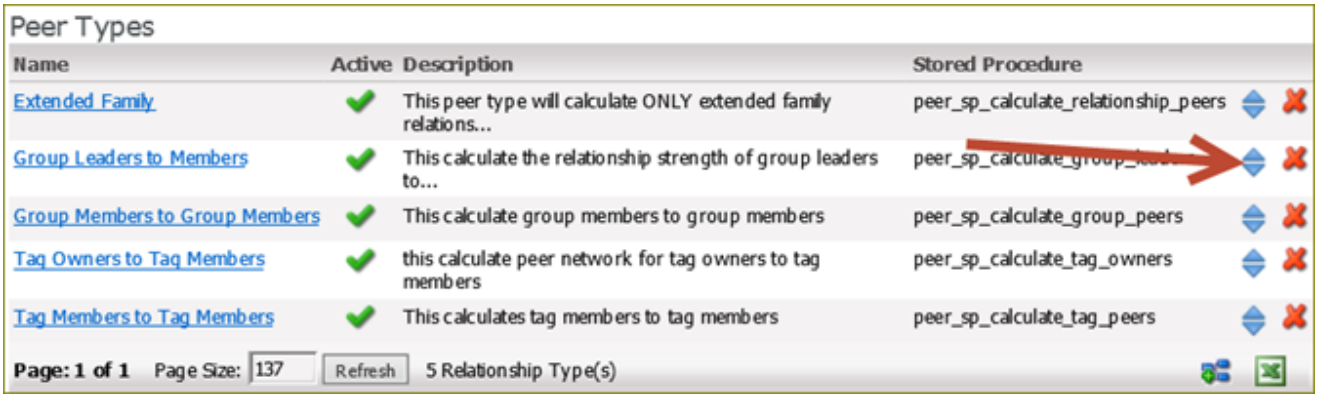
8. Enter the **Value** for this peer type. A large value indicates a stronger 'peer' connection.



9. Click the **Update** button.

10. Repeat steps 1-8 for to setup additional peer types.

11. Click and hold the **Reorder** icon to move the Peer Type to the desired order. The peer types are processed in the order listed on this page. If you are using the calculate_declining_stored procedure, you must make it the last one in the list or it does not calculate any below itself.



Peer Types

Name	Active	Description	Stored Procedure
Extended Family	✔	This peer type will calculate ONLY extended family relations...	peer_sp_calculate_relationship_peers
Group Leaders to Members	✔	This calculate the relationship strength of group leaders to...	peer_sp_calculate_group_leaders
Group Members to Group Members	✔	This calculate group members to group members	peer_sp_calculate_group_peers
Tag Owners to Tag Members	✔	this calculate peer network for tag owners to tag members	peer_sp_calculate_tag_owners
Tag Members to Tag Members	✔	This calculates tag members to tag members	peer_sp_calculate_tag_peers

Page: 1 of 1 Page Size: 137 Refresh 5 Relationship Type(s)

List Configuration

Use the **List Configuration** page to select specific criteria and criteria controls to make available for each Report Type used on the My Lists and Public Lists pages. There are many criterion available by default so it is important to review all criteria before your staff uses either My or Public Lists.

If you have added new criteria, either from the conversion process or manually, be sure the same criteria is available for My and Public Lists. For example, as you add new Person Attributes, be sure the new fields are available in Lists. This is of course after you configure security for the new fields.

On the **List Configuration** page, tables, criteria controls and attribute controls are listed for each list type.

List Type	Enabled			
Computer Systems	✔	Tables	Criteria Controls	
Contribution	✔	Tables	Criteria Controls	Attribute Controls
Group List Criteria	✔	Tables	Criteria Controls	
Parent List Criteria	✔	Tables	Criteria Controls	Attribute Controls
Person List Criteria	✔	Tables	Criteria Controls	Attribute Controls

Page: 1 of 1 Page Size: 10 Refresh 5 List Type(s)

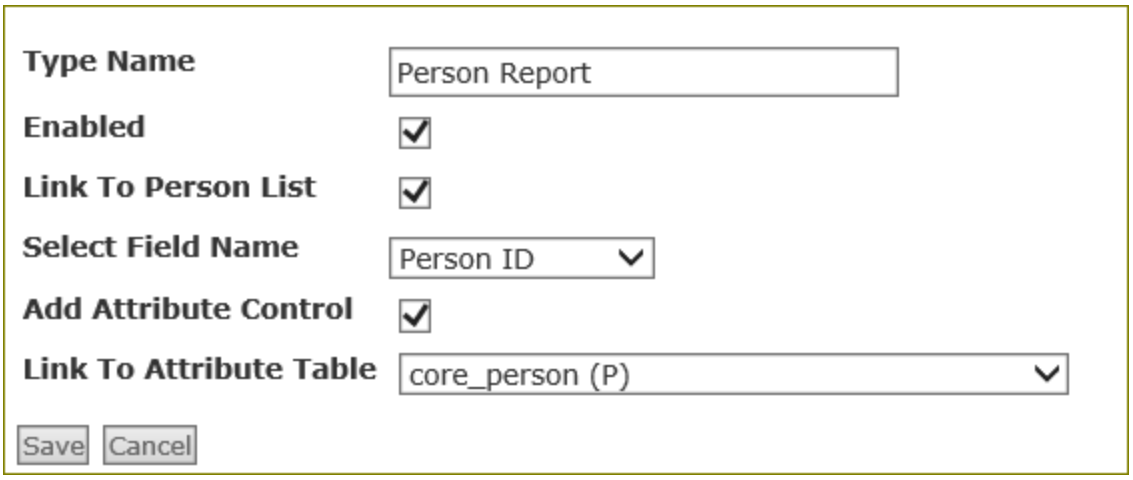
- **List Types** - Arena has five default List Types. Each list type has specific criteria available such contribution fields for the Contribution List Type. (Arena Administrators can apply module security to limit access to specific List Types on the respective module.)
- **Computer Systems** – This List Type has criteria specific for monitoring and managing

computers on the same network as Arena.

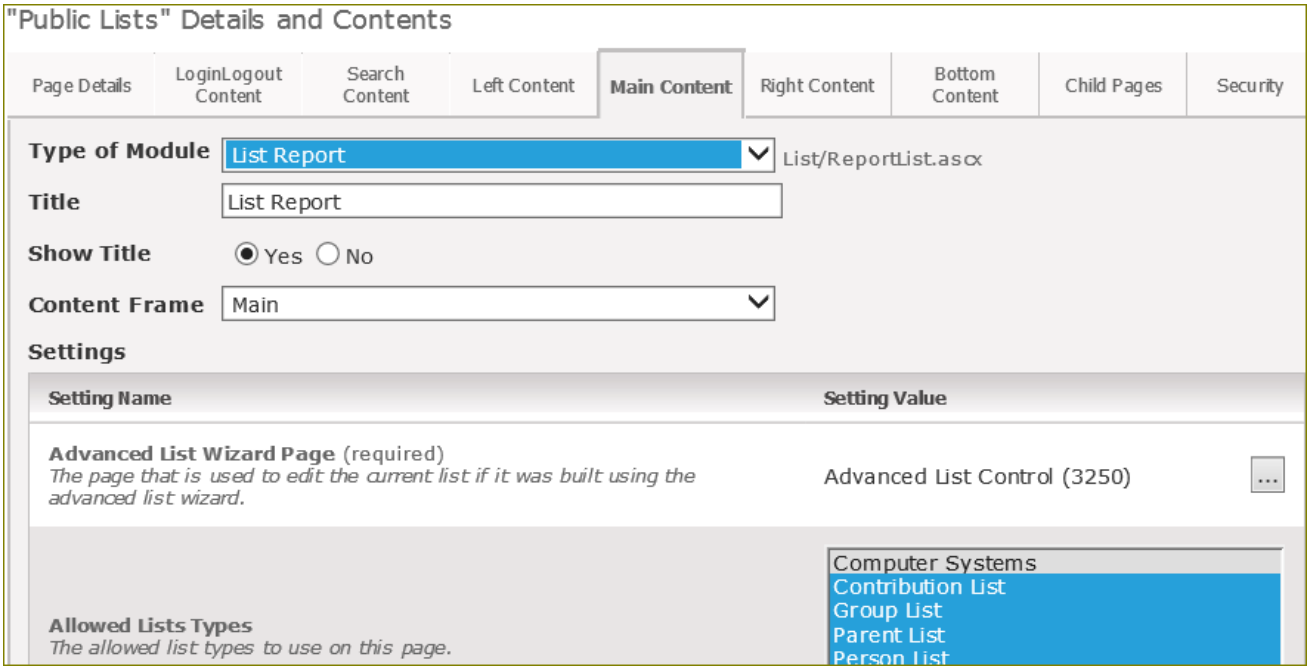
- **Contribution** – This List Type has advanced contributions criteria.
- **Group List Criteria** – This List Type has advanced group criteria.
- **Parent List Criteria** – This List Type has criteria of records with the Child Family Role and the parents of the children.
- **Person List Criteria** – This List Type has a broad array of fields for all records. This is the most used List Type.
- **Tables** – Click the ***Tables*** link to display all tables associated with the Report Type.
- **Criteria Controls** – Click the ***Criteria Controls*** link to display the collection of criterion available. Criterion is organization in sections. Click this link to display the different sections.
- **Attribute Controls** – Click the ***Attribute Controls*** link to display all available person attributes.

List Types

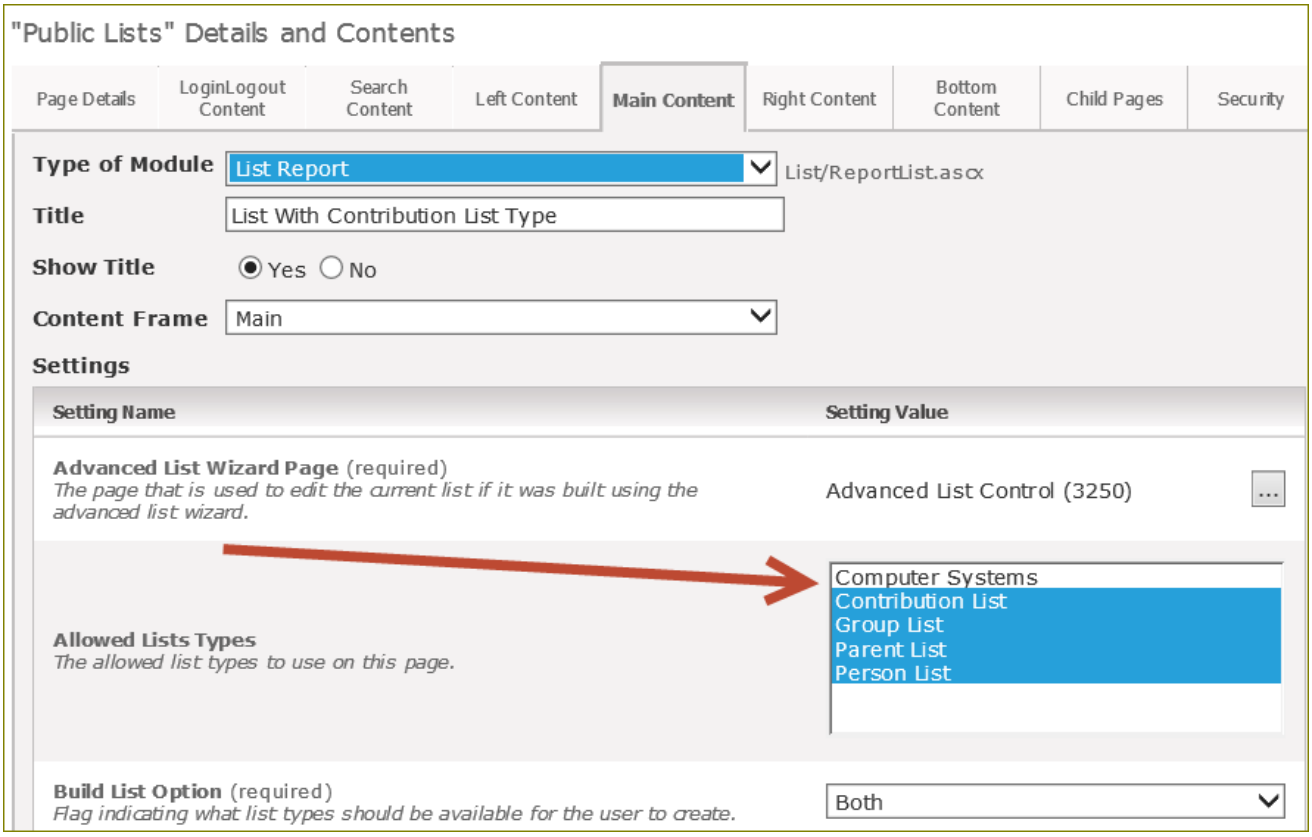
Click the **Edit** icon to display the List Type details. This is where you can enable or disable a List Type.



By default, all List Types are available for My and Public Lists. Arena Administrators can restrict access to List Types by selecting the desired List Types for the List Report module, as shown below.

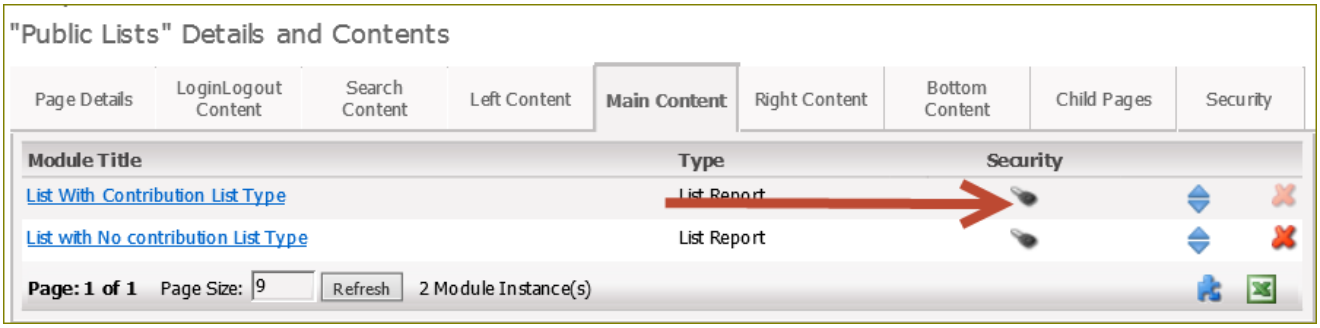


If the goal is to allow a limited number of users to the Contribution List type, you can add the List Report module a second time to the **Public List** page, with all the same settings as the original module and remove the Contribution List type. This module is also where you can set to make both Basic and Advanced Lists available.



Then you can set security for the respective modules by the different users via security roles or individual users. You want users to have access to only one of these modules to avoid both

modules displaying the **My** or **Public List Detail** page.



List Tables

Click a specific **Table** for a List Type to display the tables configured for the List Type. Click the ***Fields*** link to display individual fields.

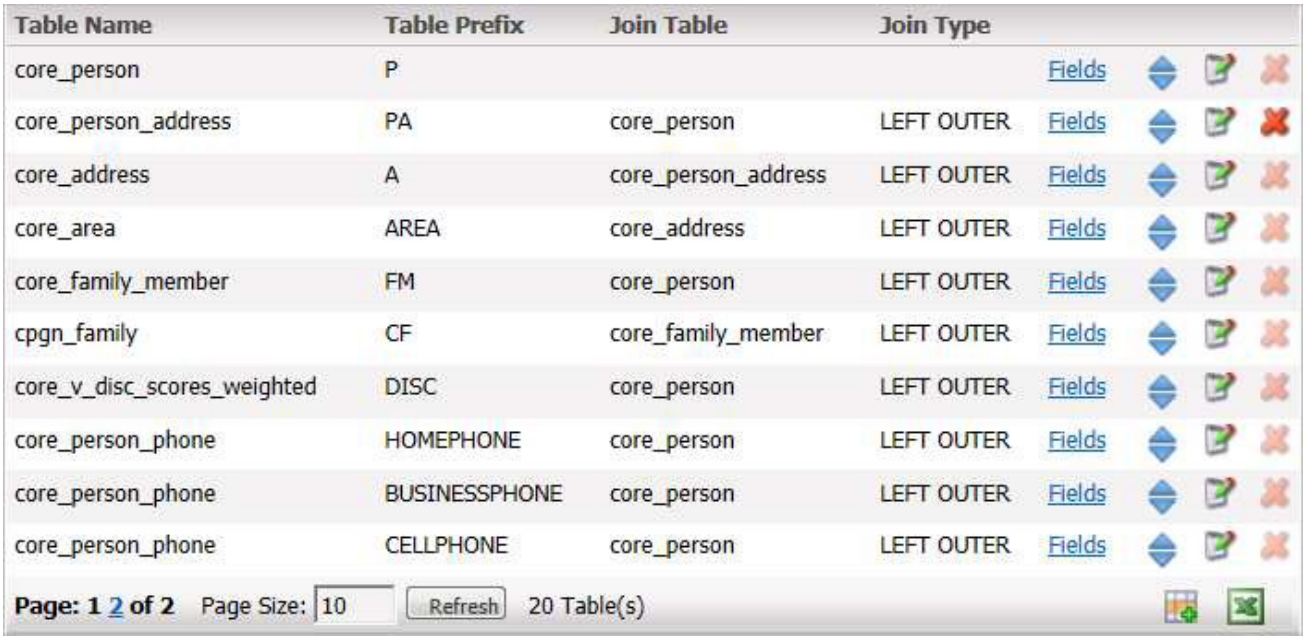


Table Name	Table Prefix	Join Table	Join Type	
core_person	P			Fields
core_person_address	PA	core_person	LEFT OUTER	Fields
core_address	A	core_person_address	LEFT OUTER	Fields
core_area	AREA	core_address	LEFT OUTER	Fields
core_family_member	FM	core_person	LEFT OUTER	Fields
cpgn_family	CF	core_family_member	LEFT OUTER	Fields
core_v_disc_scores_weighted	DISC	core_person	LEFT OUTER	Fields
core_person_phone	HOMEPHONE	core_person	LEFT OUTER	Fields
core_person_phone	BUSINESSPHONE	core_person	LEFT OUTER	Fields
core_person_phone	CELLPHONE	core_person	LEFT OUTER	Fields

Page: 1 2 of 2 Page Size: 10 Refresh 20 Table(s)

Add Existing Fields when Exporting to Excel

The List Merge Fields define which available fields must be included in the Excel export of a list. You want to leave at least Person_ID checked for use with other features such as mail merge, as well as, those fields used in the specific features such as address and title.

1. From the **Administration** menu, click the **List Configuration** option located under the

CONFIGURE heading.

2. Click the ***Tables*** link for the List Type to modify.

List Type	Enabled			
Computer Systems	✔	Tables	Criteria Controls	
Contribution	✔	Tables	Criteria Controls	Attribute Controls
Group List Criteria	✔	Tables	Criteria Controls	
Parent List Criteria	✔	Tables	Criteria Controls	Attribute Controls
Person List Criteria	✔	Tables	Criteria Controls	Attribute Controls

3. Click the ***Fields*** link of the table to which you would like to select criteria.

Table Name	Table Prefix	Join Table	Join Type	
core_person	P			Fields
core_person_address	PA	core_person	LEFT OUTER	Fields
core_address	A	core_person_address	LEFT OUTER	Fields
core_area	AREA	core_address	LEFT OUTER	Fields
core_family_member	FM	core_person	LEFT OUTER	Fields

4. Select the **Required** check box of the fields to include when users export to Excel. Required fields are included with every Excel export.

Display Name	Merge Document Name	Field Type	Required
Adults in Family	adult_count	Function_LookUp	☐
Age	age	Function_LookUp	☐
Anniversary Date	anniversary_date	Regular	☐
Birth Date	birth_date	Regular	☐
Birth Day	birth_day	Function_LookUp	☐
Birth Month	birth_month	Function_LookUp	☐

5. Click the **Update** button.

Criteria Controls

Click the ***Criteria Controls*** link to display the criteria sections available for the List Type and the ***Controls*** link to display the individual fields. You can enable or disable a criteria section and/or specific criteria controls.

Criteria Name	Description	Enabled		
Basic Criteria	Basic Fields To Build SQL query	☑	Controls	
Extended Criteria	Extended	☑	Controls	
Advanced Criteria	Advanced	☑	Controls	
Personallity Criteria	Personallity	☑	Controls	
Small Group Criteria	Small Group	☑	Controls	
Tag Criteria	Tag	☑	Controls	
Sport Criteria	Sport Clubs	☑	Controls	
Campaign Criteria	Campaign	☑	Controls	
Contributions	Contributions Criteria	☐	Controls	
Counseling Retrictions	Counseling Restrictions	☑	Controls	

Page: 1 2 of 2 Page Size: 10 Refresh 11 Criteria(s)

Enable or Disable Existing Criteria for use in My Lists and Public Lists

Arena honors field security as specified in the List Wizard module which applies to both My and Public Lists.

1. From the **Administration** menu, click the **List Configuration** option located under the CONFIGURE heading.

2. Click the ***Criteria Controls*** link for a List Type, as desired.

List Type	Enabled			
Computer Systems	✔	Tables	Criteria Controls	
Contribution	✔	Tables	Criteria Controls	Attribute Controls
Group List Criteria	✔	Tables	Criteria Controls	
Parent List Criteria	✔	Tables	Criteria Controls	Attribute Controls
Person List Criteria	✔	Tables	Criteria Controls	Attribute Controls

Page: 1 of 1 Page Size: 10 Refresh 5 List Type(s)

3. Click the ***Controls*** link for the List type you wish to modify.

Criteria Name	Description	Enabled		
Basic Criteria	Basic Fields To Build SQL query	☑	Controls	
Extended Criteria	Extended	☑	Controls	
Advanced Criteria	Advanced	☑	Controls	
Personallity Criteria	Personallity	☑	Controls	
Small Group Criteria	Small Group	☑	Controls	
Tag Criteria	Tag	☑	Controls	

4. Select the appropriate check box of the criteria you wish to enable or disable.

Display Name	Type	Enabled		
Email	Function_CompareString	☑		
Birth Date	Range_DateTime	☑		
Birth Month	Function_RangeMonth	☑		
Birth Day	Function_RangeDay	☑		
Anniversary Date	Compare_DateTime	☑		
Adults in Family	Function_CompareInt	☑		
Children in Family	Function_CompareInt	☑		
Serving Status	Query_Const_LookUp	☑		
Serving Hour	Query_CompareInt	☑		
Unique Email	Function_CompareString	☑		

Page: 1 2 of 2 Page Size: 10 Refresh 13 Control(s)

5. Click the **Update** button.

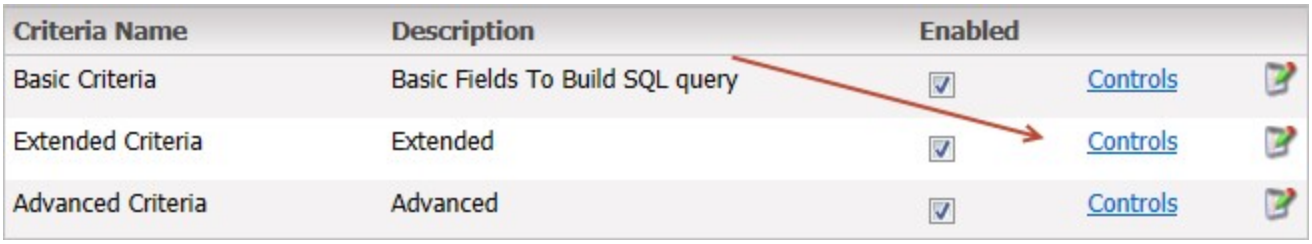
6. Refresh cache and verify.

Include Null value for Attribute Dates

1. From the **Administration** menu, click the **List Configuration** option located under the CONFIGURE heading.

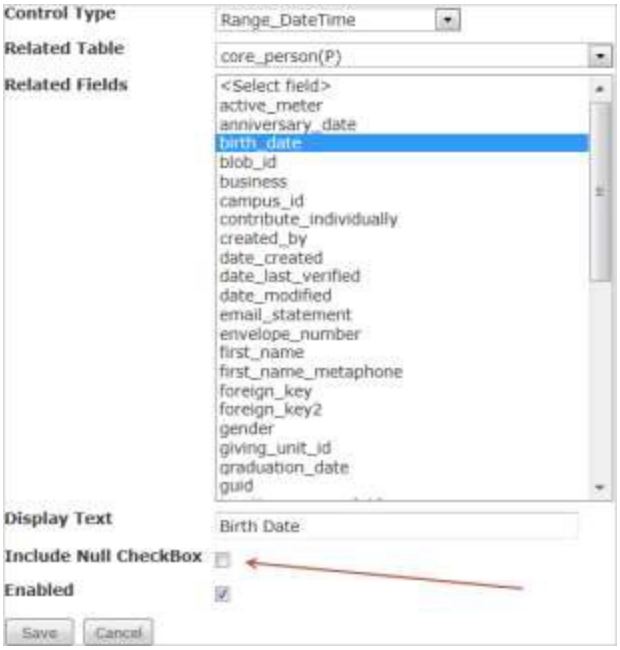
2. Click the ***Criteria Controls*** link for the Report Type you want to modify.

3. Click the ***Controls*** link for the Criteria Group you want to modify.



4. Click the **Edit** icon of the Module you want to change.

5. Select the **Include Null** check box. This option is not available to all criteria.



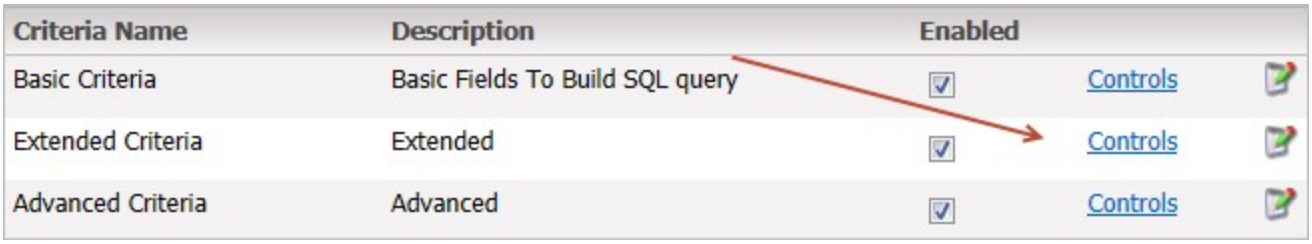
6. Click the **Save** button.

Change the Setting to Pull Active or Inactive Lookup Values

1. From the **Administration** menu, click the **List Configuration** option located under the CONFIGURE heading.

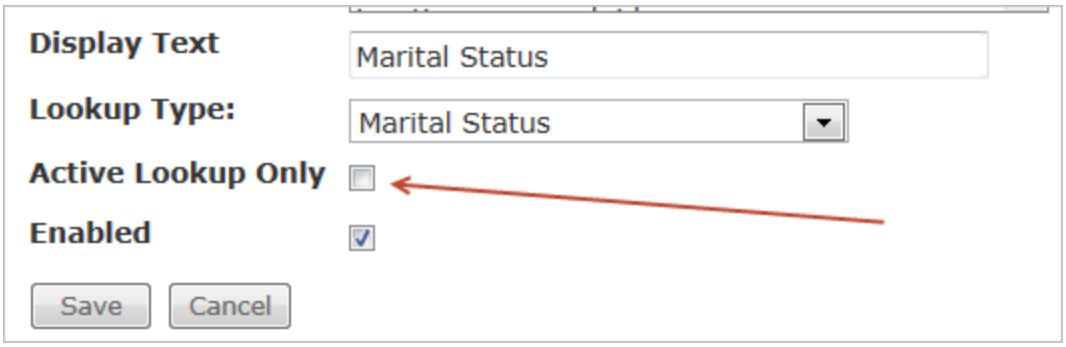
2. Click the ***Criteria Controls*** link for a specific Report Type.

3. Click the ***Controls*** link that uses Lookup values (e.g., Member Status).



4. Click the **Edit** icon of the Module you want to change.

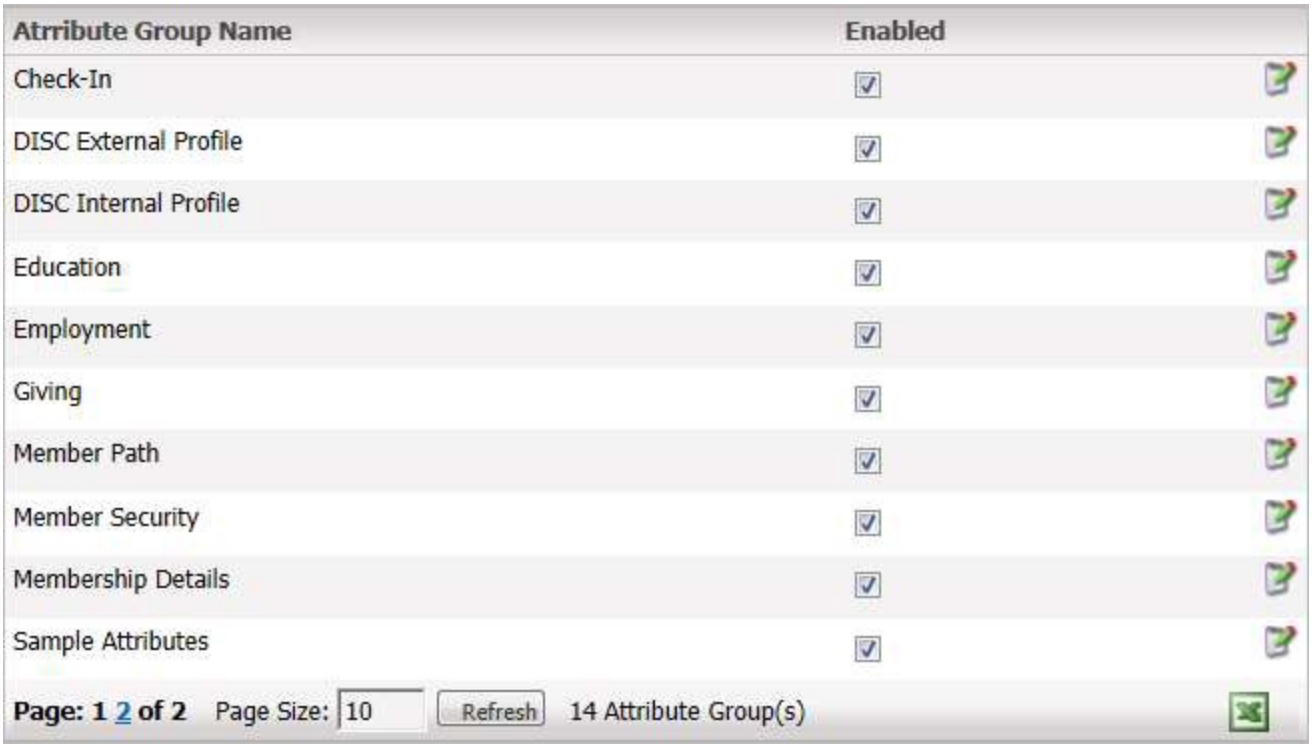
5. Select the **Active Lookup Only** check box.



6. Click the **Save** button.

Attribute Groups

Click the ***Attribute Group*** link to display Person Attributes and click the **Edit** icon to display specific fields. You can enable/disable all or select fields. You cannot delete the core person attribute fields but can disable any core field your organization is not using. Enable the attribute group so that attribute fields are available to users in My/Public Lists.



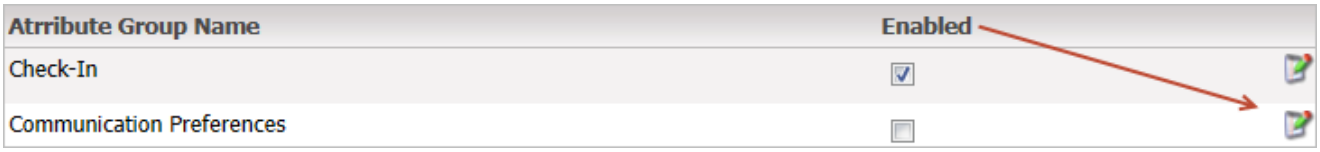
Add a Custom Person Attribute to Public/My Lists

To create custom Person Attributes:

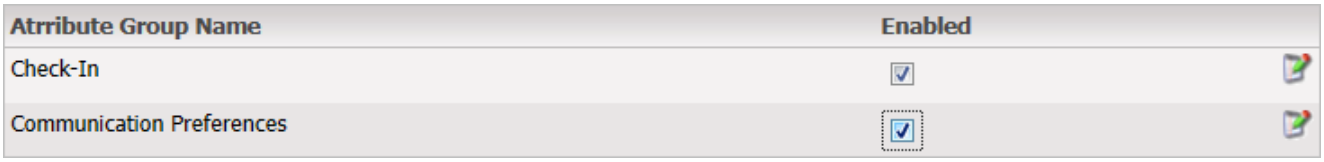
1. From the **Administration** menu, click the **List Configuration** option located under the CONFIGURE heading.

2. Click the ***Attribute Controls*** link for the List Type you want to add attributes.

3. Click the **Edit** icon to edit the attribute group.

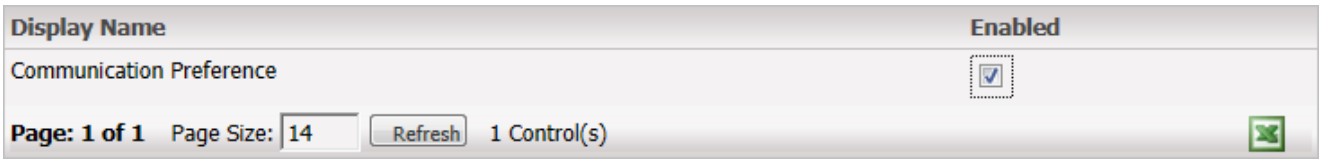


4. Select the **Enabled** check box for each attribute you want to add to list criteria.



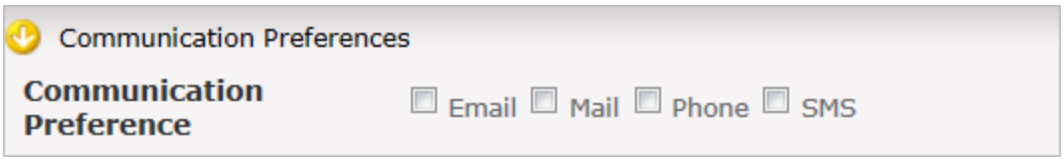
5. Click the **Update** button.

6. Select the **Enabled** check box for the attribute group.



7. Click the **Update** button.

8. Verify.

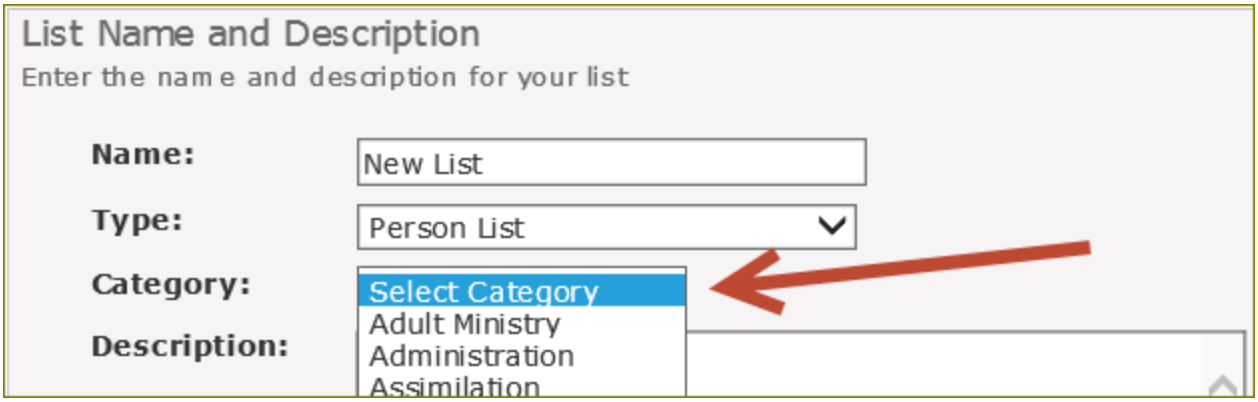


List Categories

When users create lists, it is beneficial to have available a category type so that lists can be easily filtered on either the **My** or **Public List** page. Use the **List Category Lookup** to customize this list.

Once the List Category Lookup is customized, users are able to select a List Category when creating new lists and filter existing Lists.

List Category Drop-down



List Category Filter

HTML from Stored Procedures

This is an extremely powerful module that allows you to display HTML content on your webpage based upon your data. This module uses SQL queries to automatically pull in fields of data based upon your specifications and the existing information on the page.

You can display something as simple and specific as a users name on the welcome page when they sign in, or something as complex and broad as displaying a monthly chart of attendance for a specific group. All the information displayed can be tied to the specific person who has signed in.

Requirements

Access to **Arena** Administration

Access to **SQL Server Management Studio** 2008r2 through 2016

Setup

First, you must be familiar with Stored Procedures. A Stored Procedure is a set of Structured Query Language (SQL) statements with an assigned name that is stored in the database in a compiled form so that it can be shared by a number of programs. In Arena, these are used to automatically process and display data on a webpage. Stored procedures are the backbone of Arena. Almost any action taken within the Arena program runs stored procedures automatically in order to get the content requested to appear on the page.

Below are the steps for setting up this process:

1 **Determine what you want to accomplish** and where you want this information to be displayed on your website. For example, Display the users name on the Homepage after they log in.

2. **Build the Stored Procedure** in SQL Server Management Studio.

3. **Add the HTML code** from the Stored Procedure module on to the desired page.

4. **Configure the settings** of the Stored Procedures including Parameters.

5. **Test**

Examples that you may want to consider for using this module include: Displaying group, family, contribution, attendance, or tag information specific to the person logged in.

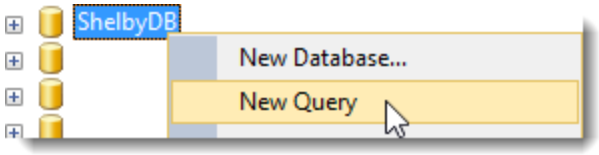
You can display who the group leader is, display a picture of the group leader, display a short summary of giving information, attendance history information, volunteer opportunities available to the logged in user, and events that cater directly to the logged in user. For example, you could display information based on a logged in users age group or other criteria that you determine such as tags or preferences, martial status, graduation date, etc.

Application

The following example shows the steps taken to create a Stored Procedure that displays the logged in users name on the Home Page.

Build the Stored Procedure in SQL Server Management Studio

1. After opening **SQL Server Management Studio**, locate your database.
2. Right-click on your database and select the option **New Query**.

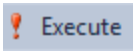


3. Create a **stored procedure**. (Enter the text of the stored procedure.)

NOTE: Your stored procedure must include the parameter of "@OrganizationID INT". As of version 2011.2.100, **Arena** passes this value when executing a stored procedure. Also, your stored procedure must return a single string that is labeled [html].

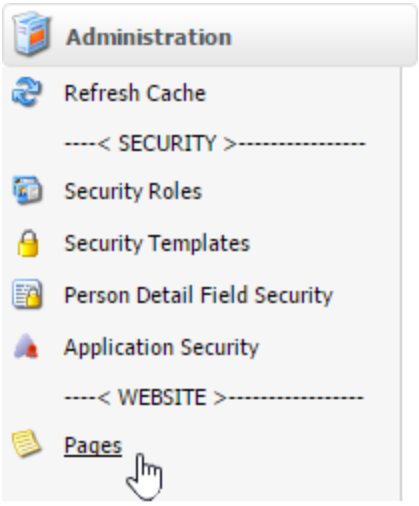
```sql
CREATE PROC [Cust_display_welcome_name]
@CurrentUser INT,
@OrganizationID INT

AS

BEGIN

DECLARE                 @Results VARCHAR (2000)

SELECT          @Results = (SELECT '<h1>Welcome, ' + p.nick_name + ' ' + p.last_name + '</h1>'
                        FROM core_person p
                        WHERE p.person_id = @CurrentUser)

SELECT          @Results AS [html]
END
```

4. Click the **Execute** button to create the stored procedure. (If you need to make changes later, change the word "CREATE" at the beginning of the stored procedure to "ALTER" then execute again to save the changes. The result must have the **html** column in all lowercase.)

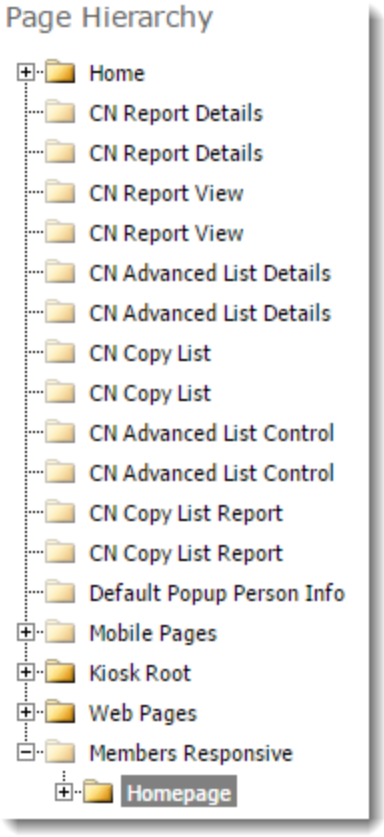


Add the HTML from Stored Procedure module on to the desired page

1. From the **Administration** menu, select the **Pages** option.

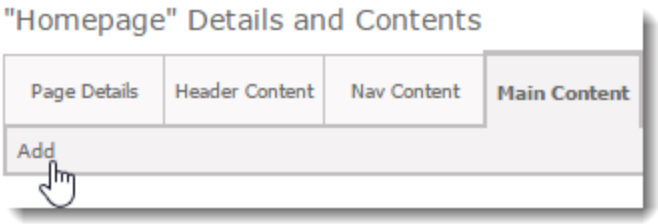


2. For this example we are using the **Members Responsive** Homepage. Select the "Homepage" folder under the **Page Hierarchy** tree view.

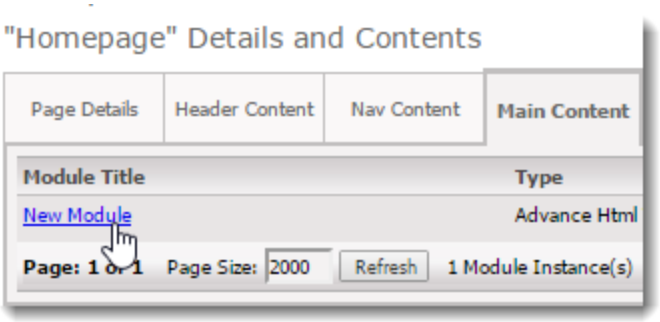


3. Click the **Main Content** tab.

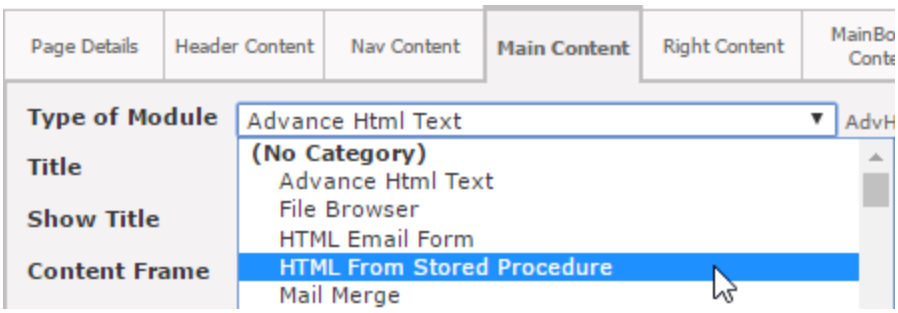
4. Click the ***Add*** link on the **Main Content** tab.



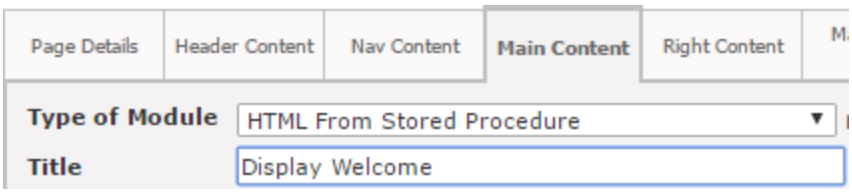
5. Click the ***New Module*** link when it appears.



6. Change the **Type of Module** from "Advance Html Text" to "HTML From Stored Procedure".

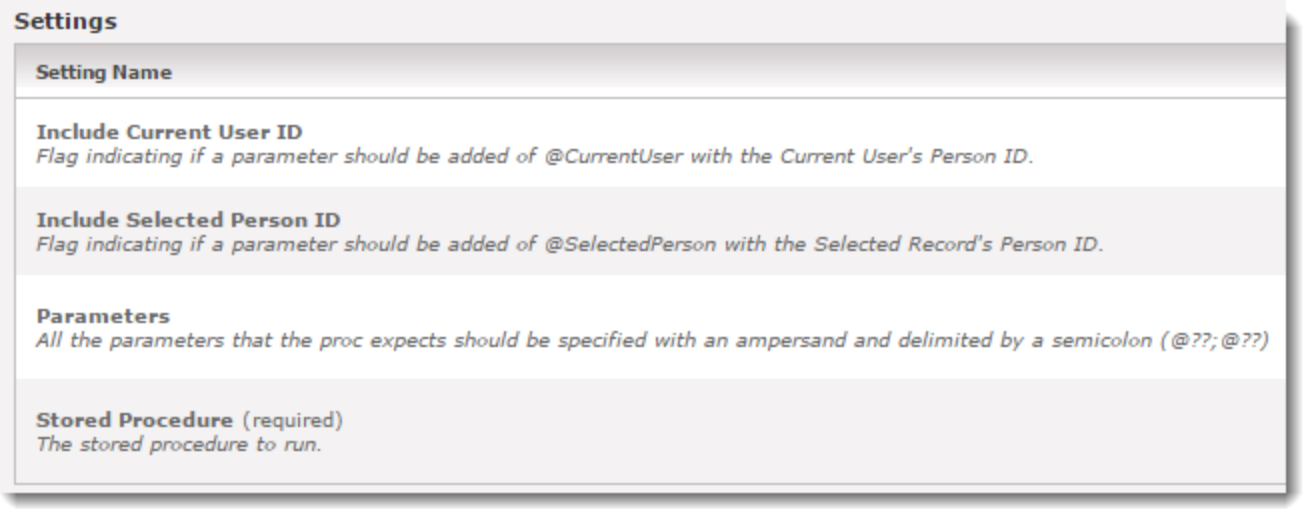


7. Change the **Title** field to describe the purpose of this module. For this example, enter "Display Welcome" in the **Title** field.



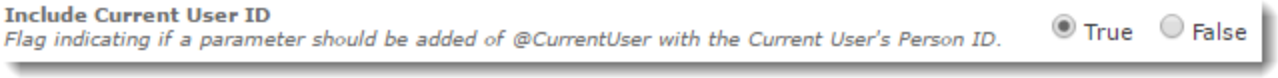
Configure the settings of the Stored Procedures including Parameters

1. From the **Main Content** tab, notice the **Settings** section. This is where you configure the settings of the stored procedure.



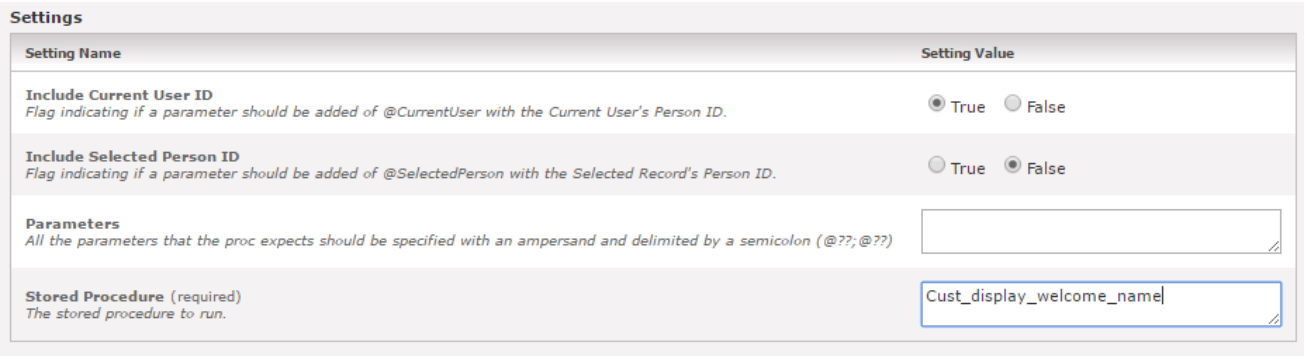
2. **Include Current User ID** - Set this to "True". This will pass the "@CurrentUser" parameter to the stored procedure without having to specify it under Parameters.

NOTE: If you have additional parameters, add them to the **Parameters** box.



3. Enter the stored procedure you wish to use in the **Stored Procedure** box.

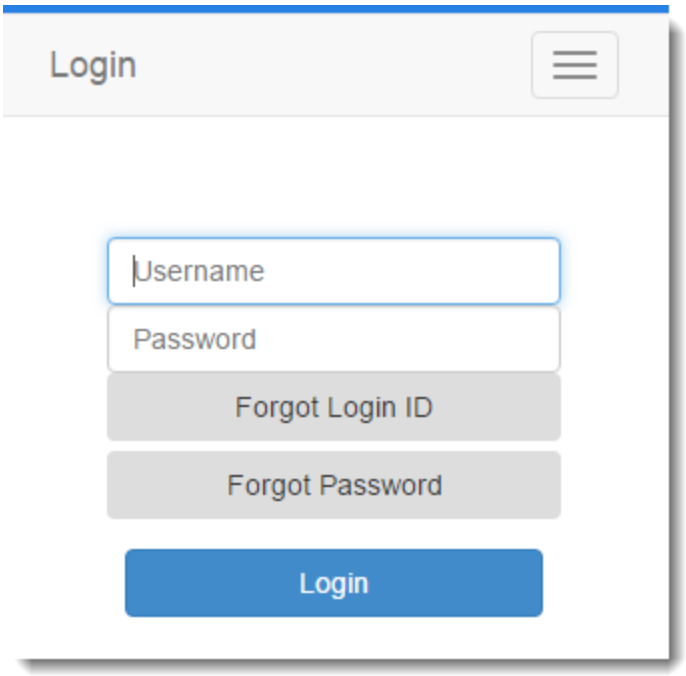
NOTE: The "@OrganizationId" is automatically passed to the stored procedure. You do not need to specify it in parameters.



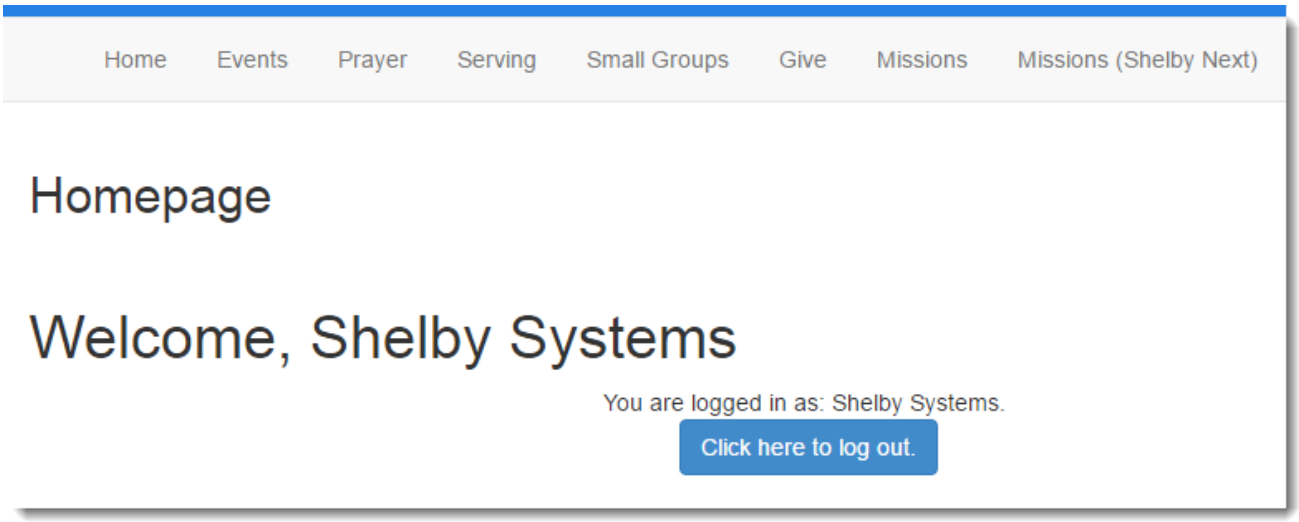
4. Click the Update button.

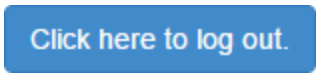
Test

1. Open a new tab on your browser or a new browser window and navigate to your members responsive site. Enter your Username and Password and then click the **Login** button.



2. **Verify** that the user's name displays on the Homepage.



3. You are finished! Click the 

button to log out.

Report Query from Stored Procedure (SProc)

This is an extremely powerful module that allows you to display the results of a stored procedure in a grid within Arena. This module uses SQL queries to automatically pull in fields of data based upon your specifications and the existing information on the page. The information displayed can be tied to the specific person who has signed in.

Requirements

Access to **Arena** Administration

Access to **SQL Server Management Studio** 2008r2 through 2016

Setup

First, you must be familiar with Stored Procedures. A Stored Procedure is a set of Structured Query Language (SQL) statements with an assigned name that is stored in the database in a compiled form so that it can be shared by a number of programs. In Arena, these are used to automatically process and display data on a web page. Stored procedures are the backbone of Arena. Almost any action taken within the Arena program runs stored procedures automatically in order to get the content requested to appear on the page.

Below are the steps for setting up this process:

1. **Determine what you want to accomplish** and where you want this information to be displayed in Arena.
2. **Build the Stored Procedure** in SQL Server Management Studio.
3. **Add the Report Grid From SPROC** module on to the desired page.
4. **Configure the settings** of the Report Grid from SPROC module settings.
5. **Test**

Application

The following example shows the steps taken to create a Stored Procedure that displays the logged in users name on the Home Page.

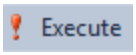
Build the Stored Procedure in SQL Server Management Studio

1. After opening **SQL Server Management Studio**, locate your database.

2. Create a **stored procedure**. (Enter the text of the stored procedure.)

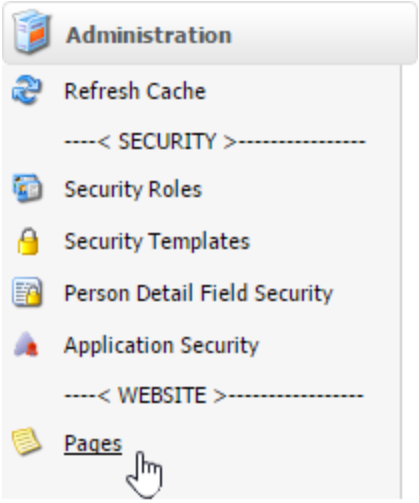
NOTE: Your stored procedure must include the parameter of "@OrganizationID INT". As of version 2011.2.100, Arena passes this value when executing a stored procedure.

3. Click the Execute button to create the stored procedure. (If you need to make changes later, change the word "CREATE" at the beginning of the stored procedure to "ALTER" then execute again to save the changes.)

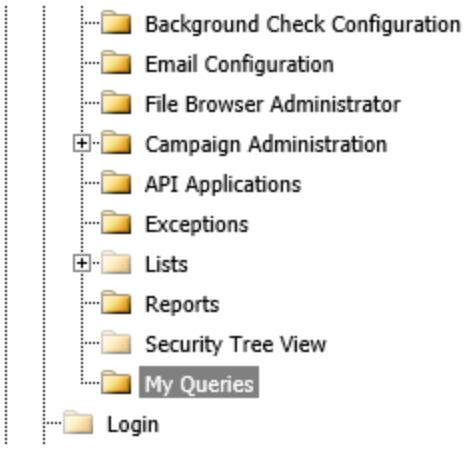


Add the Report Grid from SPROC module on to the desired page

1. From the Administration menu, select the Pages option.

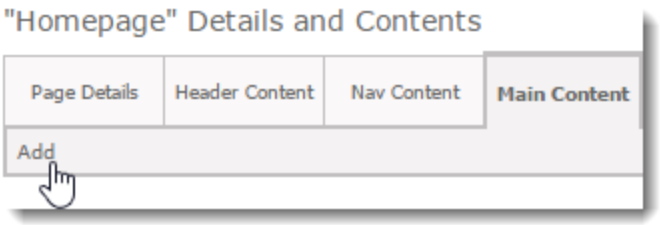


2. For this example we are using the My Queries page which is a new page created under Administration.

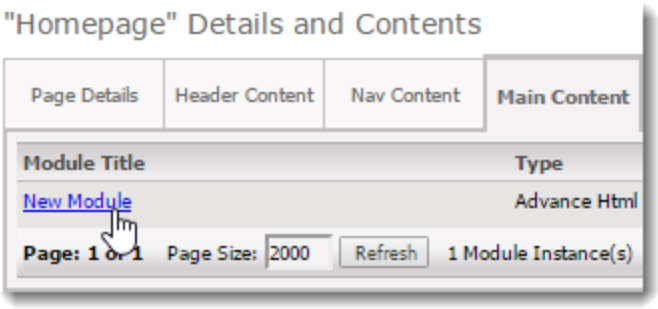


3. Click the Main Content tab.

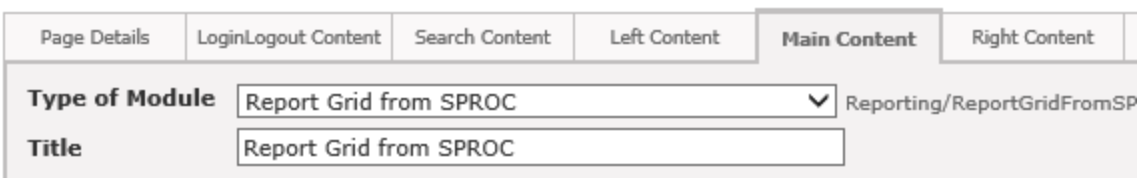
4. Click the Add link on the Main Content tab.



5. Click the New Module link when it appears.



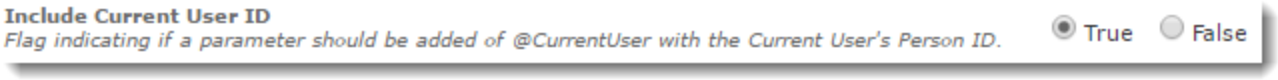
6. Change the Type of Module from "Advance Html Text" to "Report Grid From SPROC". Change the Title field to describe the purpose of this module.



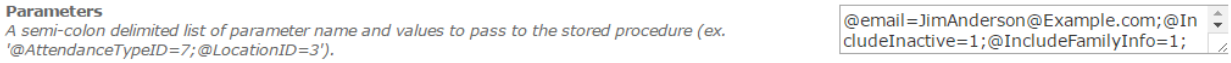
Configure the settings of the Report Grid From SPROC.

1. From the Main Content tab, notice the Settings section. This is where you configure the settings of the module.

2. nclude Current User ID - Set this to "True". This will pass the "@CurrentUser" parameter to the stored procedure without having to specify it under Parameters.



3. Enter the parameters of the stored procedure if needed. Note: If parameters are defined in the module setting these values can also be passed through the URL.



4. Enter the stored procedure you wish to use in the Stored Procedure box.

5. Click the Update button.

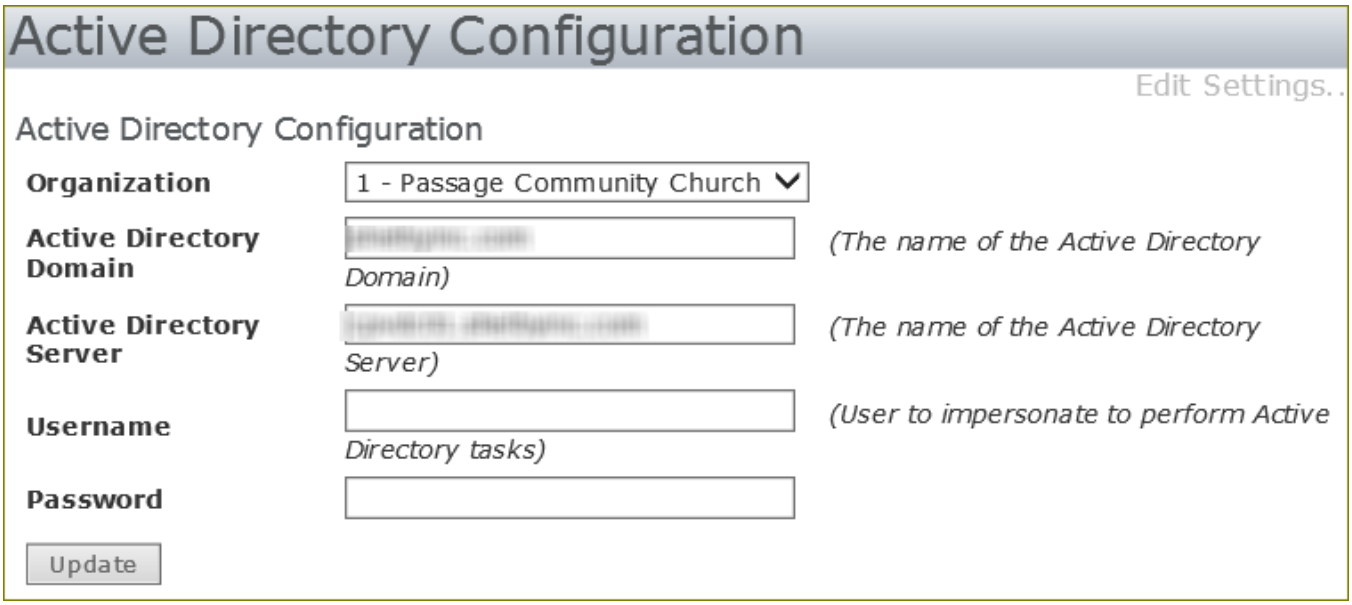
Test

1. Browse to your page with the Report Grid From SPROC module to see the grid display the results of the stored procedure and settings used.

Administration

Active Directory Configuration

Use this page to configure Active Directory for your organization.



- **Organization** – This field displays your organization and templates if using Shelby Financials.
- **Active Directory Domain** – Enter the active directory domain address.
- **Active Directory Server** – Enter the active directory server address.
- **Username and Password** – These are the credentials for an account that can query Active Directory (LDAP). This is any valid account on the domain but typically either a domain admin account or an account specifically setup for this application to use (a service account but not to be confused with the Network Service account).

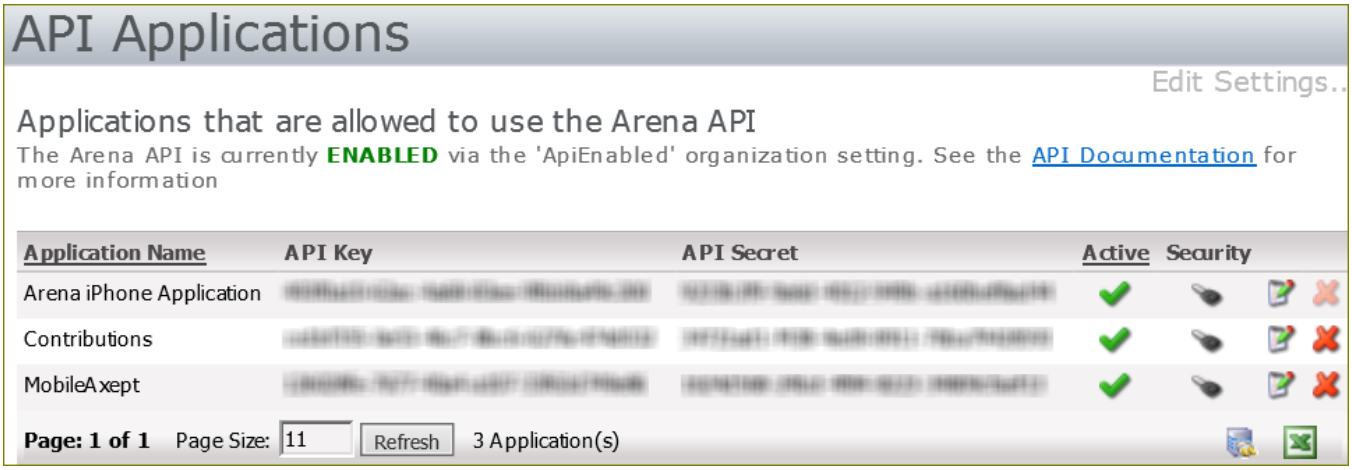
API Applications

API integration is available for customers that have an Arena Developer license. Click the ***API Documentation*** link on this page to access more information regarding Arena API settings, obtaining sessions, calculating a signature, and endpoints. You can access the documentation via URL such as http://arena/api.svc/help.

Review and adjust accordingly the API Organization Settings listed below:

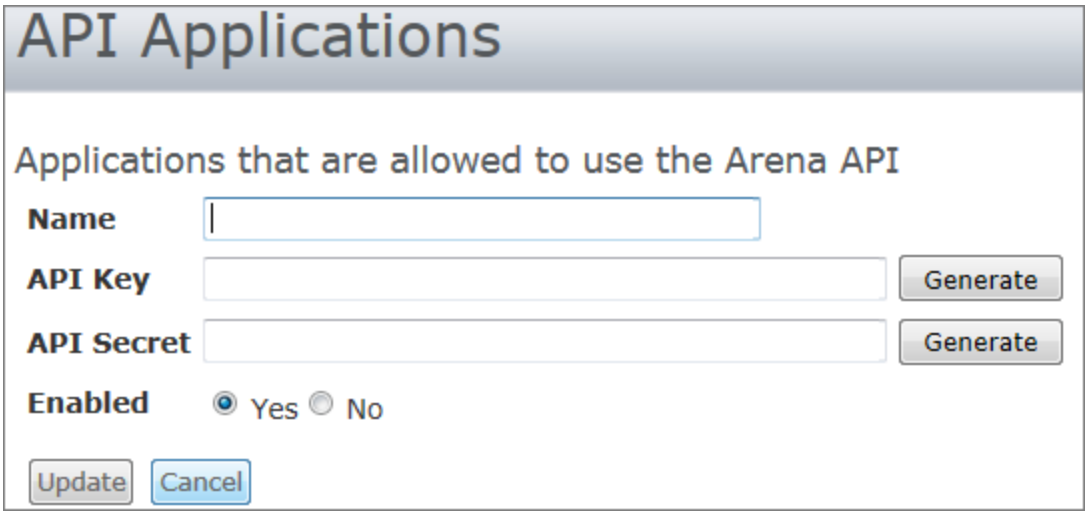
- **API Enabled** – Set this value to "True" to use API functionality.

- **API Enforce Person Field Security** – Set this to "True" to enforce field level security when using REST API.
- **API Test Mode Enabled** – Enter a valid login to use for testing.
- **API URL** – This organization should contain the API URL for your organization.



- **Application Name** – This is the name of the API application.
- **API Key** – This is the key for the API application.
- **API Secret** – This is the secret key for the application.
- **Active** – The **Check Mark** icon indicates the API application is active.
- **Security** – Use the Arena security key to adjust security. Users need at least **View** rights.

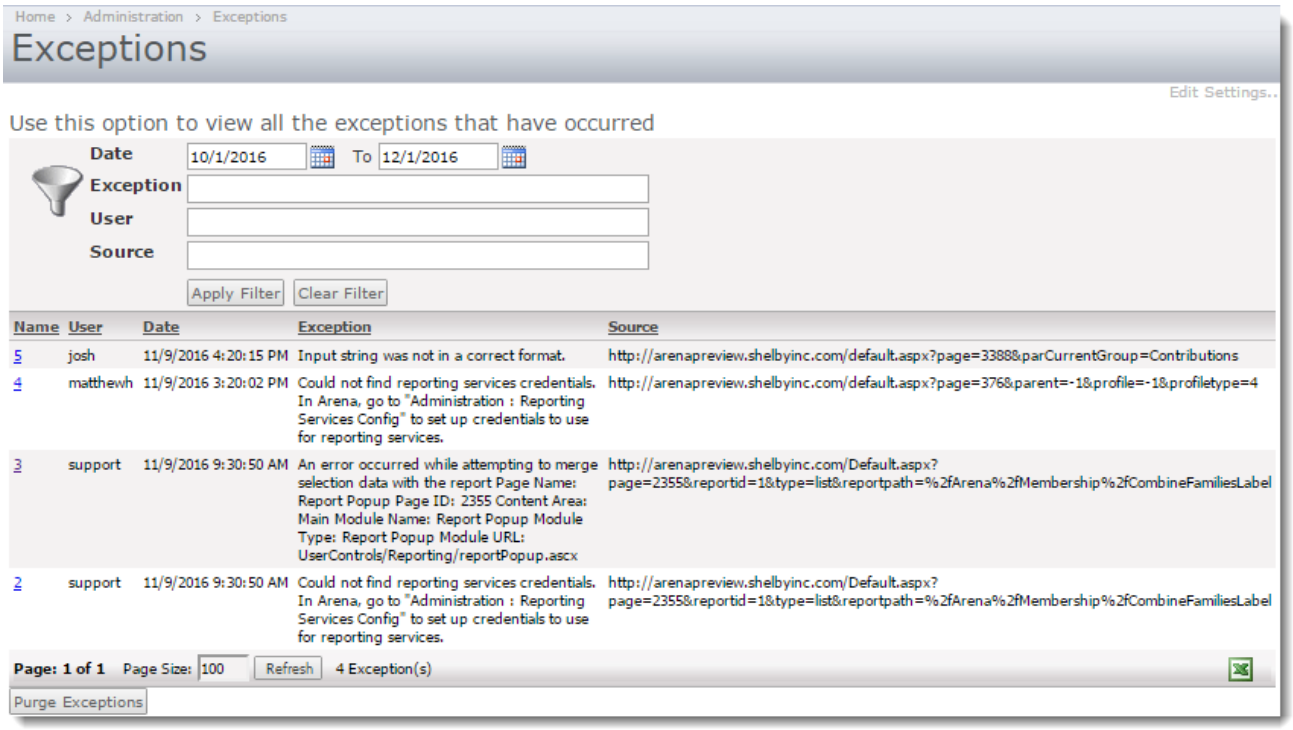
Click the **Add New Application** icon to add an API application.



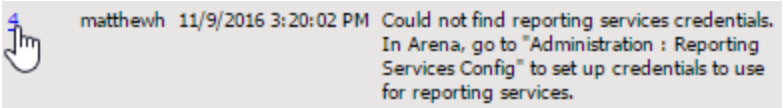
Exceptions

Arena retains a log when exceptions are generated. While most exceptions display on the user's screen when they occur, Arena records a log of the exception. Some exceptions, like Access Restrictions, do not display. Arena can also send an email to the designated recipient if the **Send Exception Organization Setting** is set to "True," and if there is a valid email in the **Exception Recipient Organization Setting**.

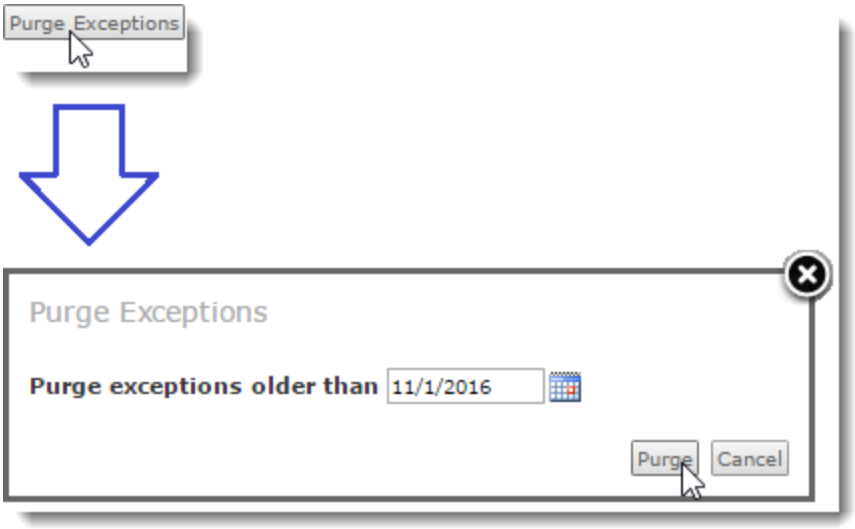
You can filter the Exceptions by entering criteria such as a date range in the Filters area and then click the **Apply Filter** button to view the filtered Exceptions.



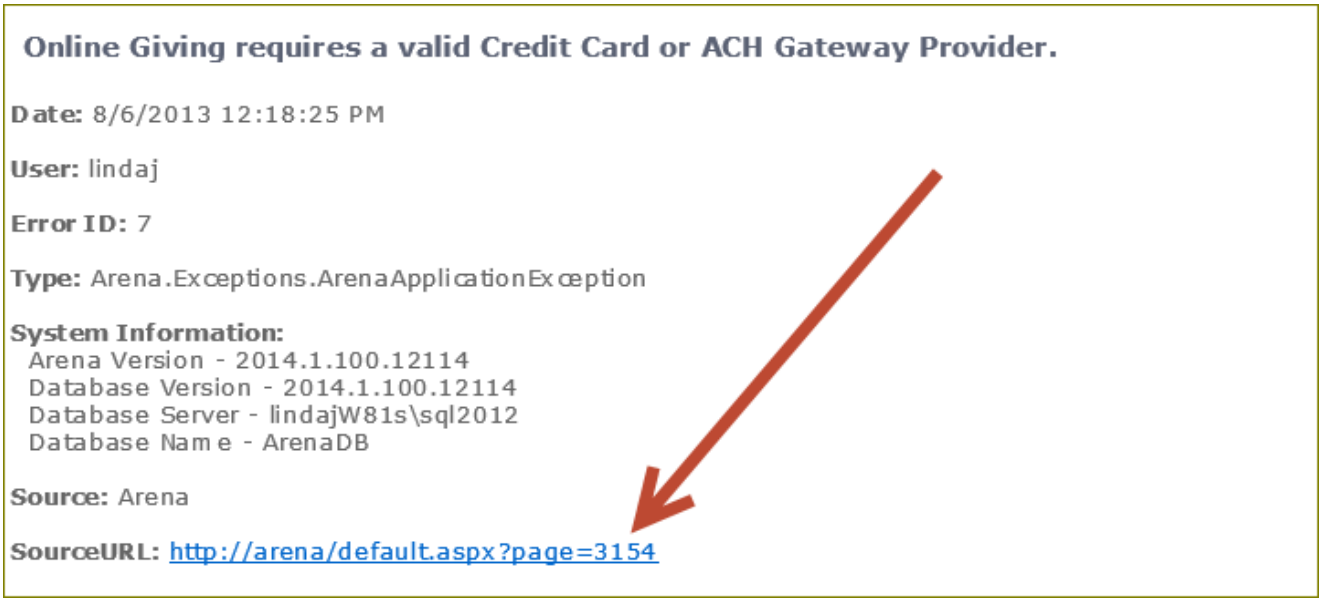
- Click the ***Exception Number*** link to display the exception details. When contacting Arena Support with exception issues or questions, you need access to this page.



- Click the **Purge Exceptions** button to remove the exceptions from the listing.



While it is not expected for you to know how to resolve exceptions, many exceptions include enough information to resolve the exception. In the below example, page 3154 was missing the required ACH Payment Gateway provider.



Refresh Cache

When administrators make changes to an Arena portal, such as adding pages, changing control settings and setting security, you may need to update the cache in order for the changes to take effect. You can also add "**&refreshcache=true**" to the full page address. In some rare instances, you may need to close the current browser session and login from a new browser session. In

some instances, you may also need to delete the browser's cache and/or reset IIS.

Implementing Website Features

Making Your Website Public

The first step to developing an Arena-managed website is to make sure it is accessible to visitors and members of your organization on the Internet. This involves:

Registering a domain name for your site and configuring it with your Domain Name System (DNS) server to route users to the correct server on your network.

Open the correct ports in your firewall for the site.

Configure Internet Information Services (IIS) on your server to properly route web-traffic. You can configure multiple Arena portals to work with the same IIS website. You must enter each unique host in the host headers for this site and enter the proper Default Host values in the portals.

Configure the Host Headers in your IIS website to route the proper domain names to your Arena-managed website.

Configure your portal in Arena to direct users to the correct pages for your website. Your network administrator likely completes the majority of these tasks.

Network Administrators need to complete the following steps before you create and configure your Arena portals:

Register a unique host name with a DNS registry service and configure it to point to the IP address of your web server.

Open the required ports in your firewall (typically port 80 for HTTP and/or port 443 for SSL).

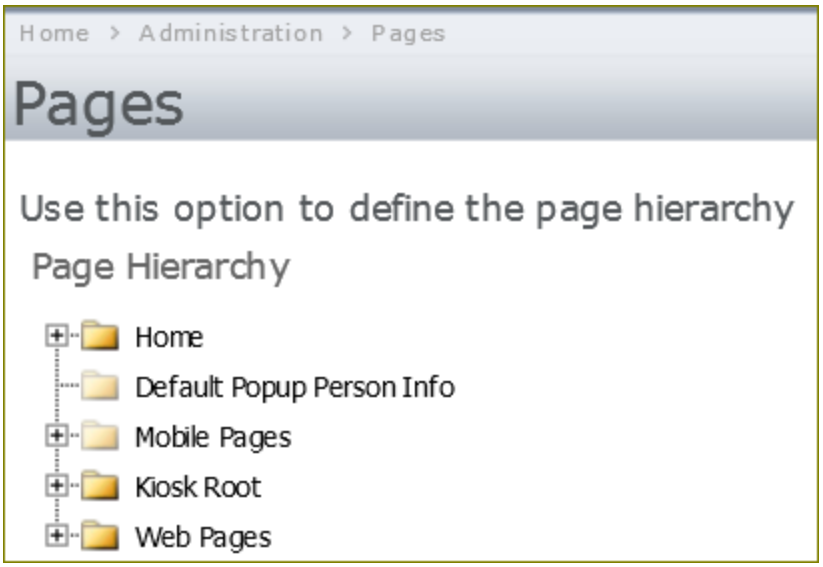
Add a host header on your IIS website for each unique host name that you plan to use for Arena.

(For self-hosted environments, to test external access, you can run a ping test from the outside to verify. If it does not return the correct IP then the Firewall is not configured to route the traffic to the internal server.)

Page Structure

The page structure is how Arena defines the layout and navigation of your website. It is frequently referred to as a page tree because it uses a hierarchy-type structure consisting of parent pages with one or more child pages, which can be parent pages as well.

While the scope of this section does not include the specific details of the design of your website, you should consider specific factors designing your website. We highly advise that you create the entire page structure for each section before adding the associated modules, as some module settings may require the existence of other pages.



- **Home** is Portal 1 used by staff on a daily basis
- **Mobile Pages** is Portal 3 used by staff via smart phones
- **Kiosk Root** is an optional portal to process contributions using a card swipe device.
- **Web Pages** is Portal 2 used by members via a browser

All Arena default portals have the basic and necessary pages and modules for basic features. Therefore, before you add new pages, you and your web team should review the existing pages, templates, CSS and modules before customizing or adding new objects. Let's first cover some page fundamentals.

Required Pages

While your specific site design is unique, several key pages are required for your Arena-managed websites to function.

Root Page – The first of these is the **Root** page, which serves to organize all of the pages for your website. This is a simple container page and it should contain no modules. To create this page (unlike other pages), first create it as a child of another page and then change its parent to "Root" in the Page Details area.

Home Page – Second is the **Home** page, which is the initial page every visitor views when they initially navigate to the site, and should be a child of your root page. This page is referenced in the portal details and by the navigation modules throughout your website. Your Home page is also frequently a different template from the rest of your site to display Flash animations, promotions, and other links to vital areas of your web site. The modules on this page vary greatly depending on your particular needs for your web site, but frequently includes a navigation bar to reach the rest of your site, promotion modules to display your active promotions, and any number of Advanced HTML Text modules to display the animations and any other static content not written into your template.

Login Page – Thirdly, you need a **Login** page (as a child of your **Home** page) which contains the User Login module to allow your web site to authenticate visitors as individual Arena users, allowing them access to secured areas of your web site as allowed by user-specific security permissions. Your **Login** page is also selected in the portal details and referenced by several modules.

The All Users security role must be able to view your **Login** page, as all visitors count as members of the All Users security role until they have passed through the **Login** page. It is also important to give view rights to the **Login** page to every security role with any permissions on this page tree, as certain modules may attempt to re-verify the identity of a user by passing their login and password to the **Login** page.

Importing/Exporting Pages

Arena allows you to import and export pages and their child pages, including any modules that exist on those pages. You can use this to move pages from one portal to another or even from one installation of Arena to another. These export files retain the modules on the exported page(s) and any child page(s), the tree structure of the exported page and any page references (such as module settings) that are internal to the tree that is begin imported. Template settings do not save and match the parent page upon import.

Inherited Attributes

When you create a page, it automatically inherits the security settings and modules of its parent page. You can use this when initially creating your website for items that will be on every page, such as the All Users Security Role or the navigation module. However, should you have cause to add a page later, remember it inherits every module on the parent page in each tab, as well as the security permissions of the parent page. Also, note that inheritance only occurs when you initially create the page. Any modules or security settings added to a page do not automatically propagate down to any child pages.

Visibility

Occasionally you find that you need to have pages in your page structure that you do not want to be visible in the navigation bars on your website. These pages can be 'hidden' by un-selecting the **Display in Nav** check box in the Page Details of each specific page. This is separate from a security option. (A user with proper security permissions can still navigate to these pages by redirects, saved links, or other means. If they do not have the proper security permissions for the page(s), they are unable to access them by any means.)

Member Logins

Arena offers several options for members to access the member pages of your external Arena website. Each option has certain trade-offs. The two primary trade-offs are security versus ease of use. If your organization currently uses Shelby WebView, make a plan to establish new logins and access to your Arena-managed website features.

Pre-generated Logins	Administrator creates logins by automated process Distribute logins to members via email Logins are assigned to existing records Logins share specific login format
Member-Requested Logins HTML Email Form	Members request specific login via email Designated person receives an email for each request
Member-Created Logins	Members create their own logins Logins are assigned to new records Logins are known only by the user Optional email verification Administrator must manage possible duplicate records Option to add registered users to a Tag for ease of managing users. This Tag can be synced with a security role. Option to set default campus for multi-campus organizations Option to set default Member Status Option to send email verification to confirm new user is not a robot

Regardless of the login option you select for your organization, the All Users security role must be able to view your **Member Login** page, as all visitors count as members of the All Users security role until they have passed through the **Login** page. It is also important to give view rights to the **Login** page to every security role with any permissions on this page tree, as certain modules may attempt to re-verify the identity of a user by passing their login and password to the **Login** page.

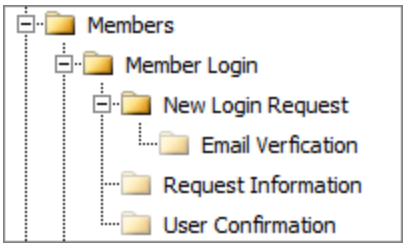
Evaluate your process for managing duplicate records that are generated as new users access the member pages of your Arena-managed website. Be sure to factor in the available module settings for each login option that helps minimize and manage duplicate records. Duplicate records are unavoidable and being able to merge records in a timely manner ensures your member have proper access.

In addition to customizing the Member Login pages, use the below checklist to configure Member Login:

Start the **Sync Role Agent**, if you are synchronizing a tag of web users with a security role.

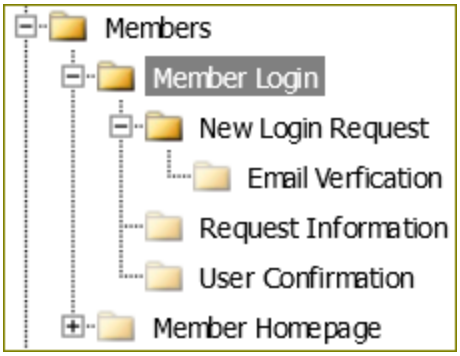
Customize the **Login Request**, **New User | Email Verification**, **Password Request** and **User Confirmation Notification System Emails**.

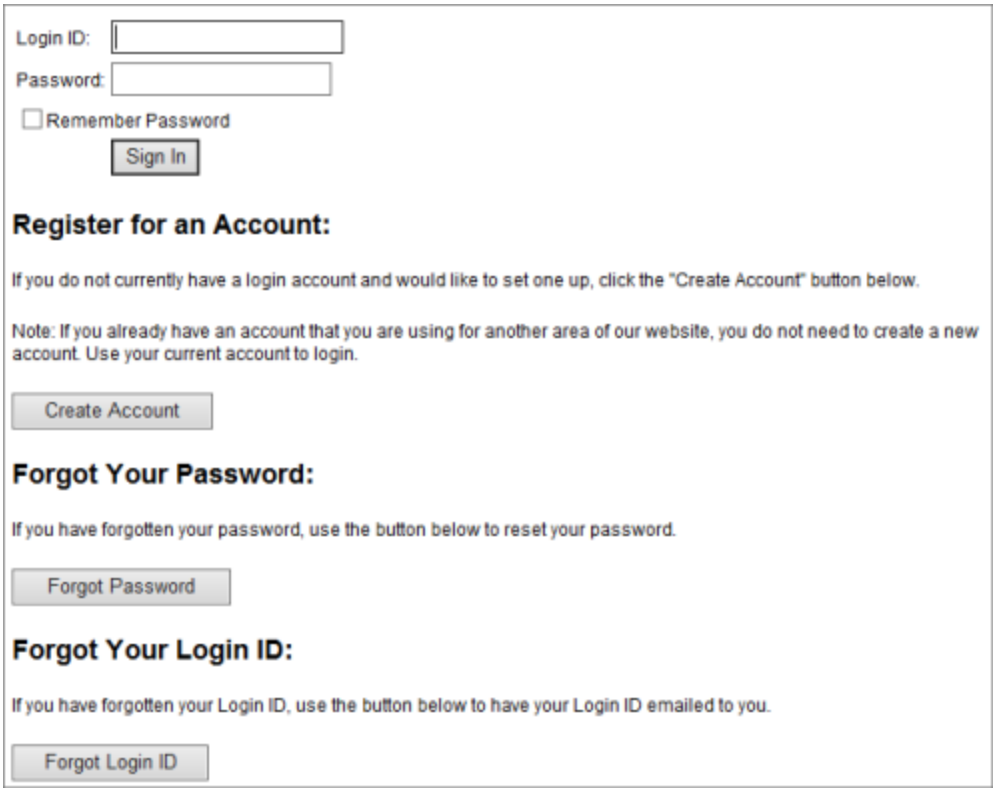
Once you determine the member login option for your organization, you are ready to customize the required pages and modules. There are four required pages and one optional page you need to review and customize as needed.



Member Login

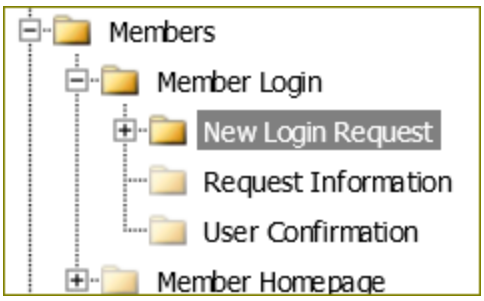
The page requires the User Login module. Set the **Allow Remember** module setting to true to display the **Remember Me** check box. Set the **Create Account Page** to the page to redirect users to login. Set the **Redirect** page to the page to direct users to after logging in. Set **Send Account Info** page to the page for users to request login credentials.





New Login Request

This page requires a new user module.



Implement Pre-Generate Logins

When the Sync Role Agent runs, Arena applies the security role permissions to the records in the specified Tag and email the new user. If a user is an existing user, the email includes the user name. If the user is new, Arena creates one based on first name initial and last name (BJones) and create a random password. The user is required to reset the password at first login.

- Start the **SyncRole** agent.
- Add records to a **Ministry Tag**.
- Customize a security role.

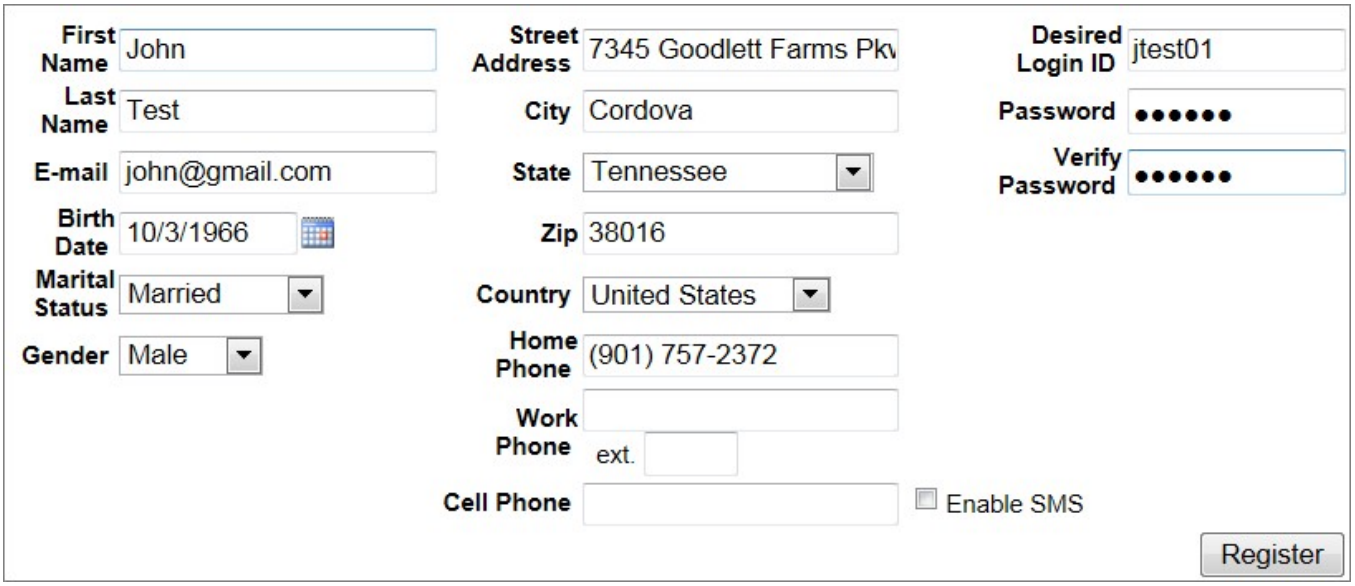
- Click the **Notify New Member** check box.
- Enter a subject.
- Complete the email message. Be sure to add the [login_information] merge field to the security role message.
- Sync the tag with the security role.

Implement the Member-Requested Logins HTML Email Form

- Add the **HTML Email Form** module to the **New Login Request** page.
- Customize this module
- Add an email to the **Email From** module setting.
- Add a name to the **From Name** module setting.
- Enter instructions in the respective module setting.
- Enter a redirect URL to direct prospective users to once they complete the HTML form.
- Enter an **Email Address** in the Recipient module setting.
- Enter a **Subject** for the email in the Subject module setting.
- Start the **SyncRole** agent.
- Customize the **New User Account | Email Verification System Email**, if using the email verification option.

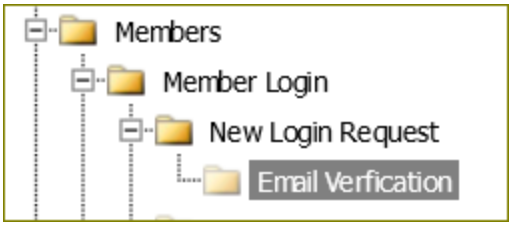
Implement Member-Created Logins

Use this option to allow new users to create logins and immediately access member pages. If the email address the new user enters already exists, the user is redirected to the Request Information page to have login credentials sent to the existing email address. Arena attempts to match existing records by last name, first name, birth date and email address. (This option can create duplicates so use the registered users Tag to identify and manage duplicates.)



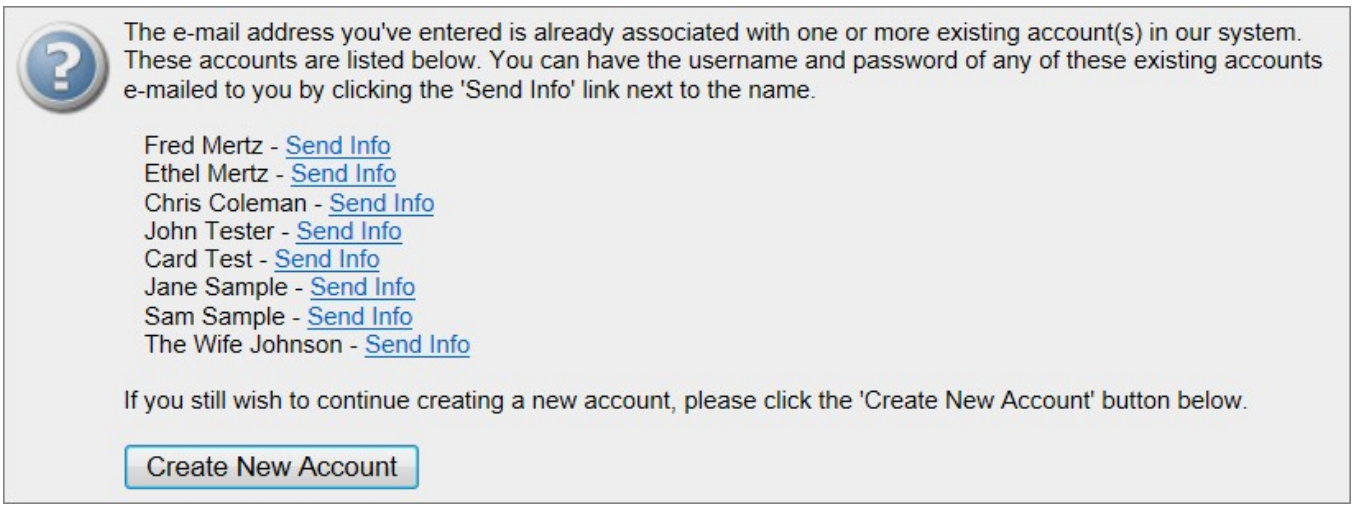
- Create a **Ministry Tag** to which Arena adds new registered users.
- Add the **New Account Request** module to the **New Login Request** page.
- Set default **Campus**, if applicable for your organization.
- Set the default **Member Status**. Consider creating a List for this member status to manage duplicate records.
- Select the optional **Email Verification** if your organization uses the email option for new users to verify they are not a robot.
- Select a **Profile ID Tag** to add the new users. This is also a tool to manage registered users and duplicate records. Consider synchronizing this tag with a Security Role that gives the new registered users the desired permission.
- Set the redirect page.
- Set the **Request Login Info Page** for new registered users whom already have a login.
- Select the **Source ID Tag Status** for new registered users. Users can use this parameter in conjunction with the Tag and Member Status to manage potential duplicate records and registered users.
- Select the **Status ID Tag Status** for new registered users added to the Tag.
- Customize a **Security Role** for users and add the above referenced **Tag** to the Security Role.
- Customize the **New User Account | Email Verification System Email**, if using the email verification option. The optional **Email Verification** page requires the Verify New User Account. If using this option, you also need to set Email Verification to "True" and the **New User Verification** page on the New Account Request module, and customize the New User Account | Email Verification System Email. Be sure to include the ##VerificationURL##

merge field code in the System Email so that users can be directed to the correct page for verification. The verification URL link is valid for five days.



New Account Request Matches an existing record

When a current user completes the New Account Request form and the email address matches an existing record, the below message displays to email the credentials to the existing record.



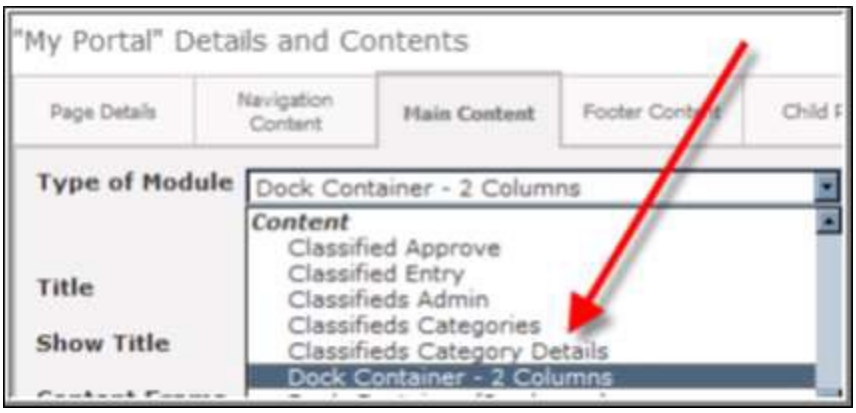
The **Request Information** page requires the Request Login Information module to allow users to have their login information sent to their email address if they forget it.

My Membership

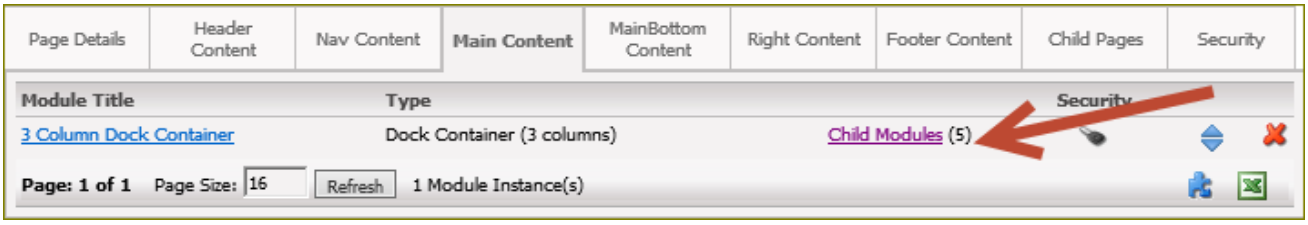
The **My Membership** page allows a member to view how they connect to your organization. While you can determine all features to make available, members can select which features to display.

Add a Member child page.

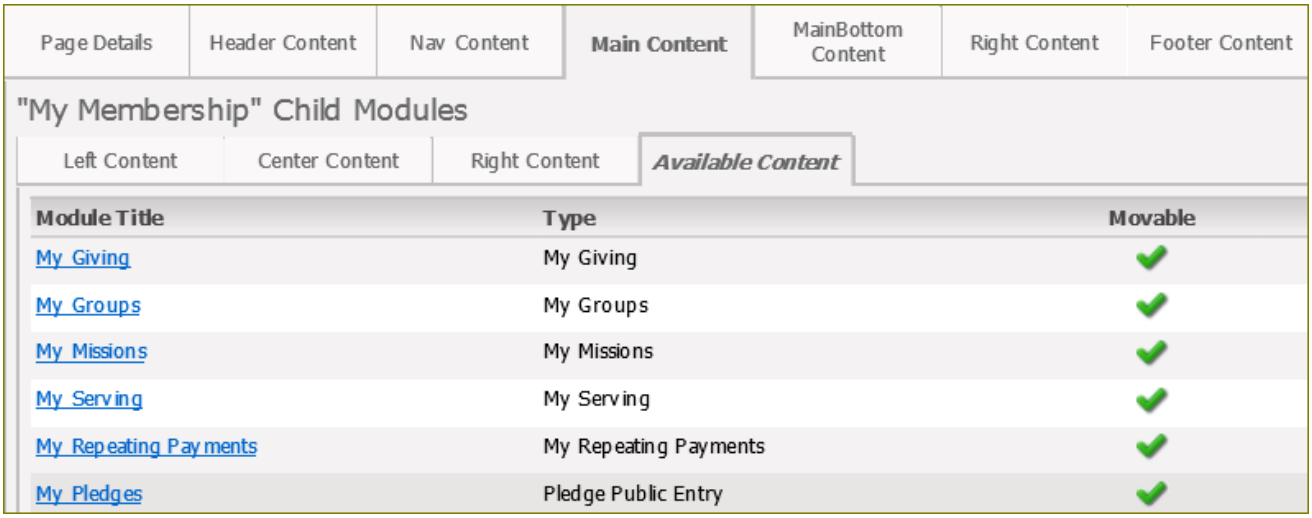
Add container module.



Click the ***Child Modules*** link.



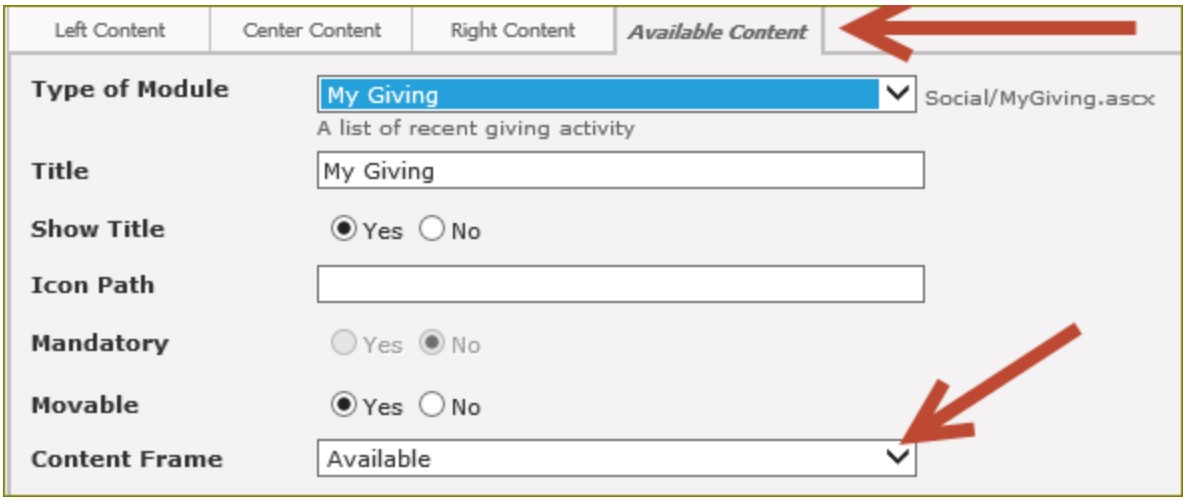
Add the desired modules. Arena has several modules available.



- The **My Giving** module displays the person's historical contributions.
- The **My Groups** module displays group(s) to which the person is a member.
- The **My Missions** module displays mission trips to which the person is an active member.
- The **My Serving** module displays serving tags to which the person is an active member.
- The **My Repeating Payments** module displays the person's repeating contribution payments.
- The **My Pledges** module displays the person's contribution pledges.
- The **My Event Registrations** displays events to which the person is a registrant.

You can select a specific content tab where the module automatically displays or add the modules to the **Available Content** tab where members can select the modules to display.

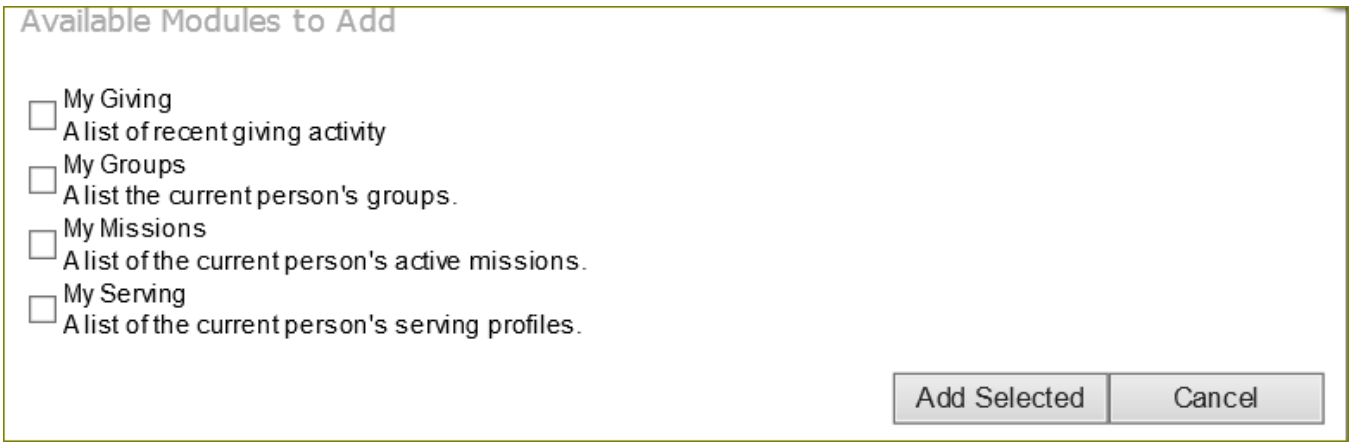
Adding modules to the **Available Content** tab allows each user to select which feature to add to the page. Consider selecting available for the content frame so that it is listed in the available window and not automatically displaying in the content area.



Set security permissions for the page, if needed. Consider adding the Registered Users Security Role.

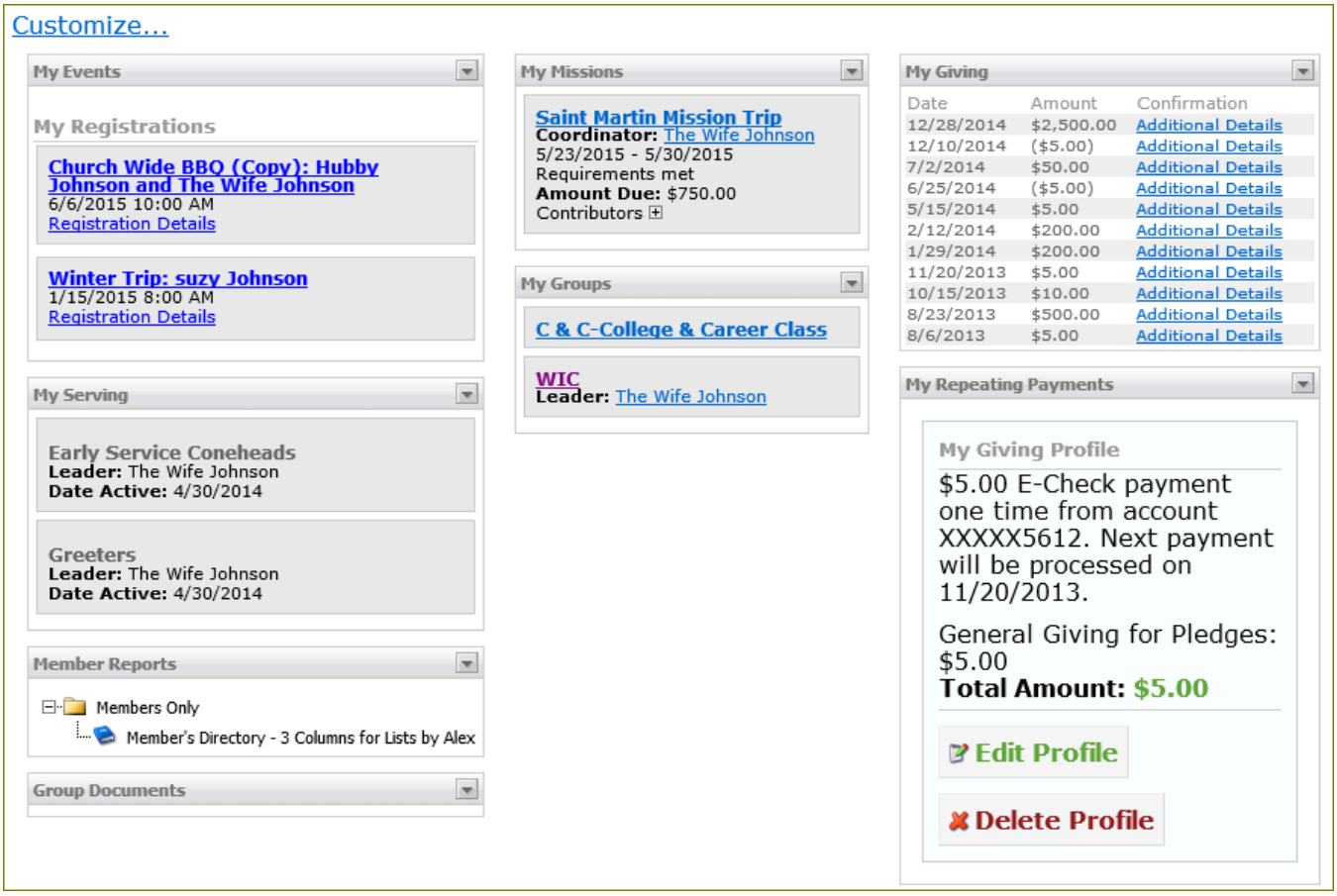
Set security permissions for each module. Consider adding the Registered Users Security Role.

Members are then able to select what to display from the Available Modules pop-up.



My Membership Page

After making the desired selections, the user specific information displays in the preset dock container format.



- **My Giving** displays historical contributions.

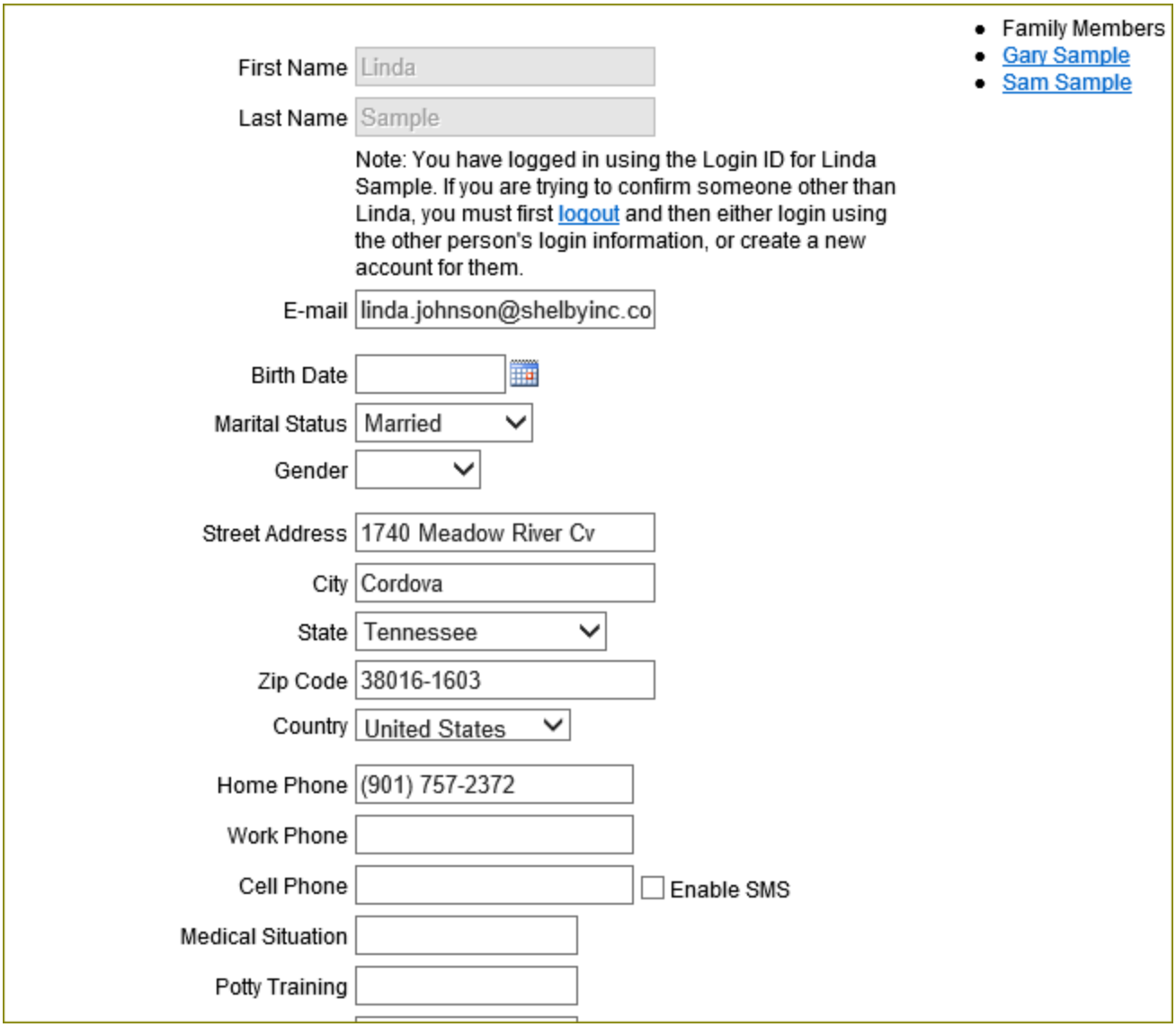
- **My Repeating Payments** displays active repeating payments with an option to edit the profile.
- **My Campaigns** displays actives campaigns to which the person is involved.
- **My Missions** displays active missions to which the person is registered.
- **My Event Registrations** displays all events to which the person is a registrant. Registrants can click the ***Registration Details*** link to make additional payments towards the event.
- **My Volunteer Information** displays specified volunteer attribute fields. With the appropriate security permissions, members can update their member data.
- **My Serving** displays all active Serving Tags to which the person is connected.

Optional User Confirmation Module

Consider using the User Confirmation Module so that members can specify fields for each family member. This module has one required module setting for Member Status and several optional settings such as sending an email to designated recipients when updates are made, especially given updates are immediately applied.

In addition to configuring the page and module, customize the **User Confirmation Notification System Email**.

If you use this option, set the Redirect module setting of your **User Login** page to "~/default.aspx?page=<page number>", (where <page number> is the page ID number of your User Confirmation page) and the Redirect module setting of this User Confirmation module to "~/default.aspx?page=<page number>" (where <page number> is the page ID number of either your home page or your member's home page). The Redirect module currently redirects the user to the existing page/tab. To redirect to a new window, consider using the Advance HTML module and create a link in this module. The User Confirmation module bypasses security for edit rights.



Online Giving

Many of your members may want to contribute to your organization online either via a single payment or a repeating payment. Contributors can create a member login and then proceed to contribute as well as view contribution history and repeating payment profiles. You can optionally configure to bypass the member login. Keep in mind the screens vary by organization and payment gateway.

In conjunction with customizing the four required pages, use the below checklist to configure this feature:

Add **Payment Gateway** account(s) to Arena. It is common practice to add one account for credit

card transactions and another account for bank account transactions.

Start the **Historical Contributions Agent**.

Customize the **Online Giving Contribution** and **Online Giving Rejected Contribution System Emails**.

Customize the **Giving Batch Name Organization Setting**.

Be sure the desired Funds are set to be available on the **Fund Management** page. In order for funds to be available for online giving, each fund must be active, have an online name and the date range for the fund much be current.

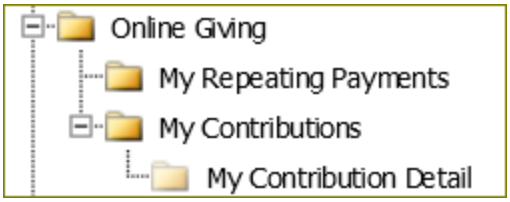
Automatically Assigning SubDonors

If you are using SubDonors and want to set the default SubDonor to a specific ind can be done under the Administration tools.

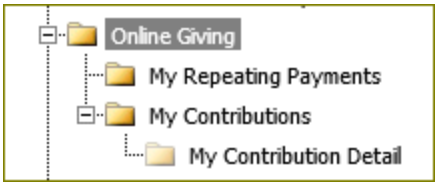
From the **Administration** menu, select the **Pages** option. Navigate to the **Give Or** (Members Responsive > Homepage > Give > Give Online). Select the **Main Conte** then click the ***Online Giving*** link. Scroll down to the **Unassociated SubDonor ID** f enter the default ID number. Click the **Update** button when you are finished.

Unassociated SubDonor ID
PersonID to set Contributions if no sub-donor is selected. Leave this field blank if you do not want it to automatically associate.

Arena Online Giving requires four pages that are already available. Review and customize each module. Arena uses a step-by-step wizard for members to confirm their personal information and/add or monitor online contributions. It is suggested to force SSL for online giving pages.



Members use the **Online Giving** page to process one time and repeating payments. This page requires the Online Giving module where you specify the ACH and credit payment gateways. This module has several settings such as the option to specify specific funds to make available, whether to allow one time and/or repeating payments, and to display honorariums. (This page should be located in a secure section of your website and should be visible in navigation. The Admin Mode for the Repeating Payment module should be set to false, unless using it on an admin external portal. If set to true, all giving displays and not just for the current user.)



Contributors have the option to make a one time gift or create a repeating payment. When repeating payment is selected, the screen refreshes where the contributor can select when to start the repeating payment and the frequency. One time gifts are processed immediately and repeating payments begin on the day specified. Batches are automatically created and available on the **Contributions** menu under the **Batch List** option. Maximum contributions amount allowed is $2,147,483,647.00.

Contact Information

Please confirm your contact information below.

First Name	George
Last Name	Sample
E-mail Address	
Home Phone	(901) 757-2372
Address	1740 Meadow River Cv
City/State/Zip	Cordova , TN 38016-1603
Country	United States

Setup Repeating Gift? ☐

Giving Amount

Enter the amount that you'd like to give.

Is this gift in honor of someone? ☐

Select Fund(s)	**Amount**
General Tithe	$
Mission Trips	$
School Scholarships	$
Memorials	$
Payment Total	$ 0.00

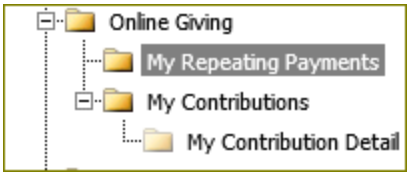
Payment Information

Enter how you would like to make your automated contribution.

Payment Method ◉ Credit Card ○ Bank Account

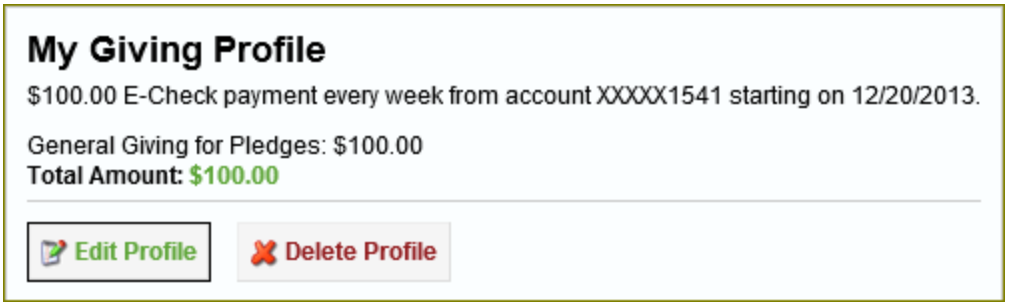
Advise contributors to NOT click the browser back button while completing the contribution. This action could result in duplicate payments.

The **My Repeating Payment** page displays members repeating payment profile(s). This page should be located as a child page of your **Online Giving** page and should be visible in navigation. It uses the My Repeating Payments module with your **Online Giving** page selected as the Repeating Payment Wizard setting and Admin mode set to False. Set the ACH Payment Gateway and CC Payment Gateway module settings. Profile Name is used for repeating payments and does not print on default statements.

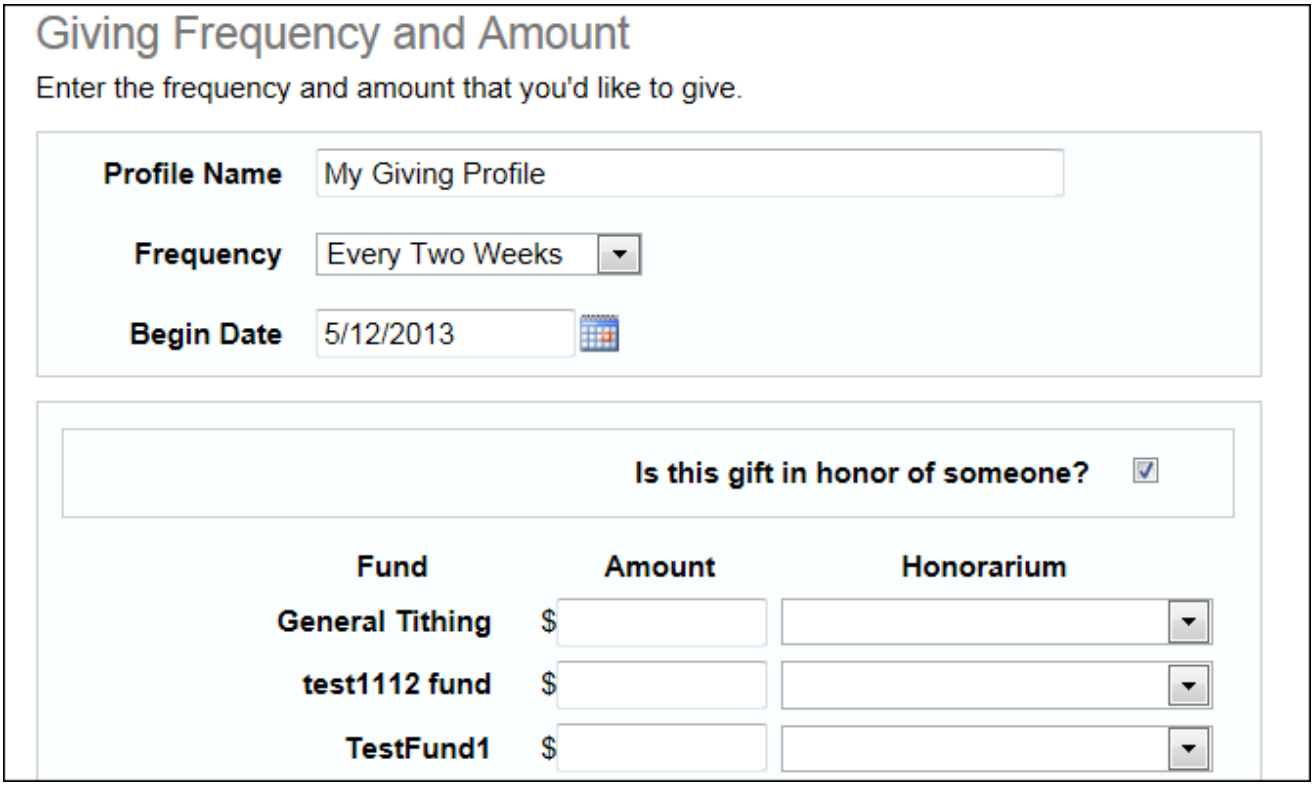


The person can edit or delete the repeating payment profile. Not all payment gateways allow

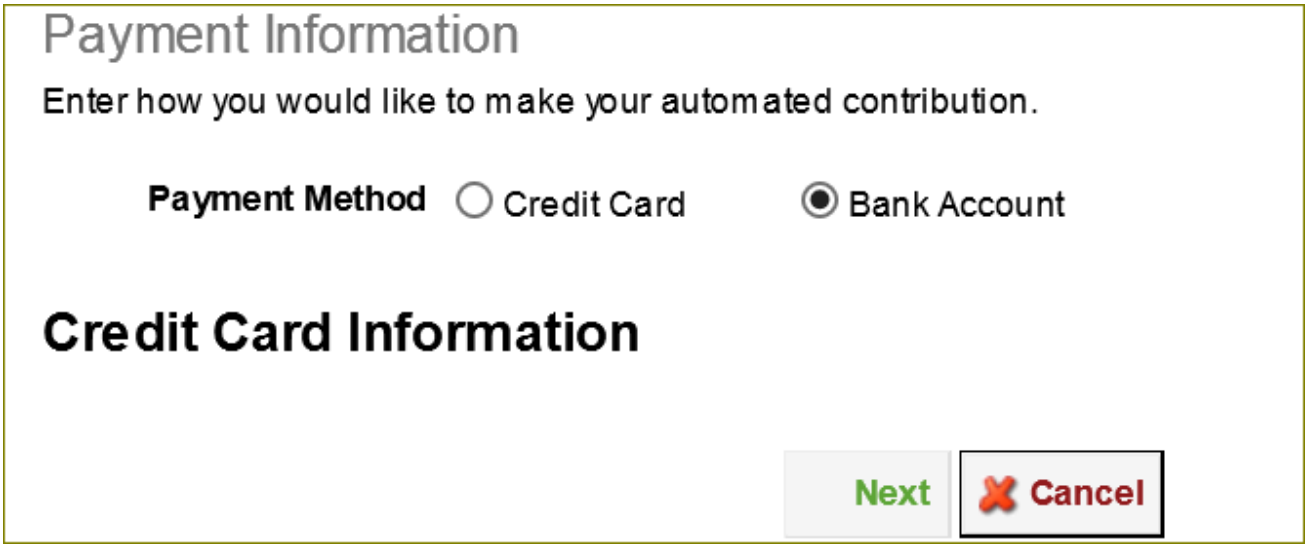
editing. They require the contributor to delete the existing repeating payment profile and create a new repeating payment profile.



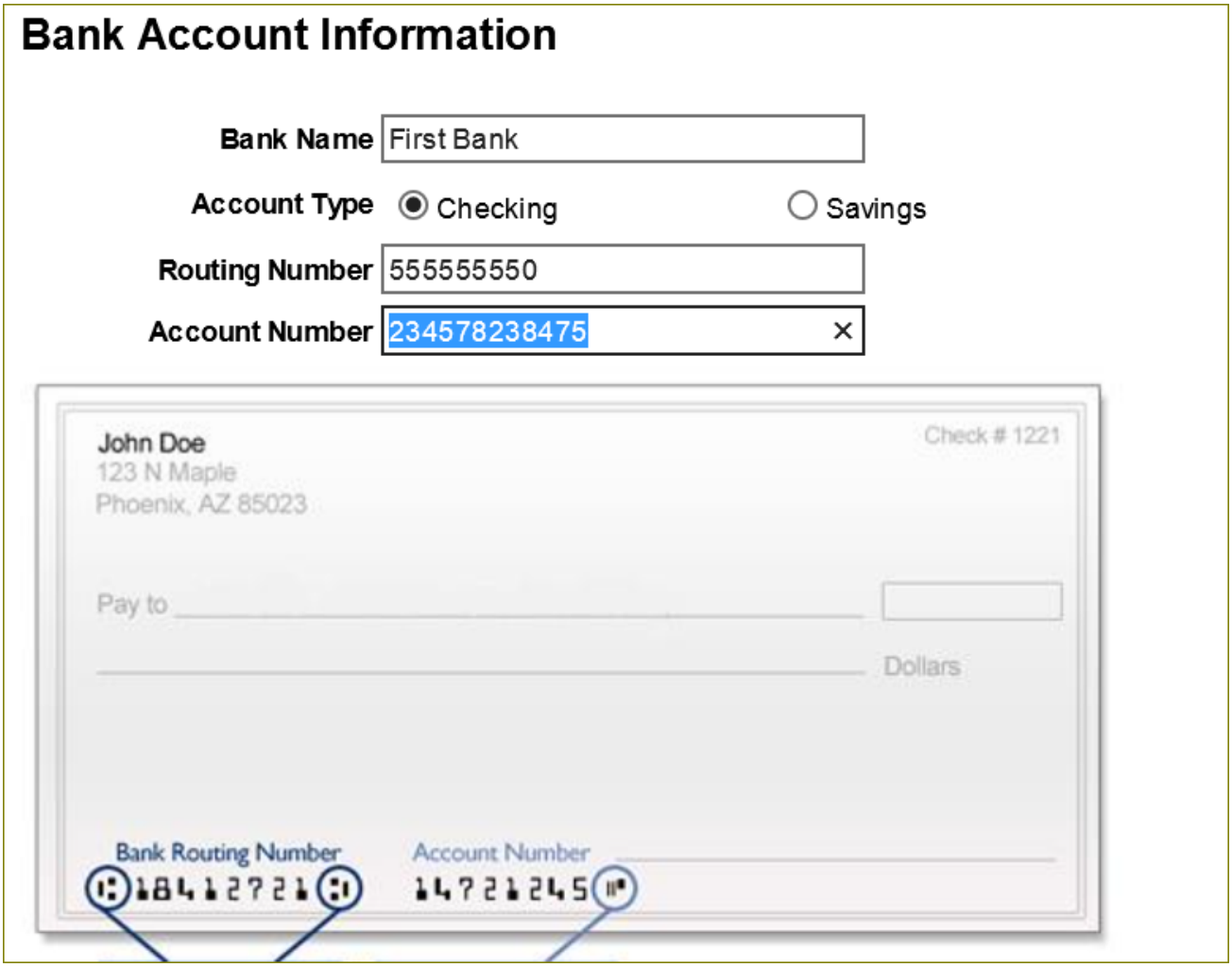
If a contributor changes their email address attached to the repeating payment profile, the contributor needs to delete the repeating payment profile and create a new one with the new email address.



Contributor can then select payment method. Payment method options are **Credit Card** and **Bank Account** (ACH).



If **Bank Account** is selected, the contributor enters bank information.



Contributor verifies contribution.

Confirm Information

Please confirm the information below. Once you have confirmed that the information is accurate and have read the On-Line Giving Agreement please click the 'Finish' button to complete your transaction.

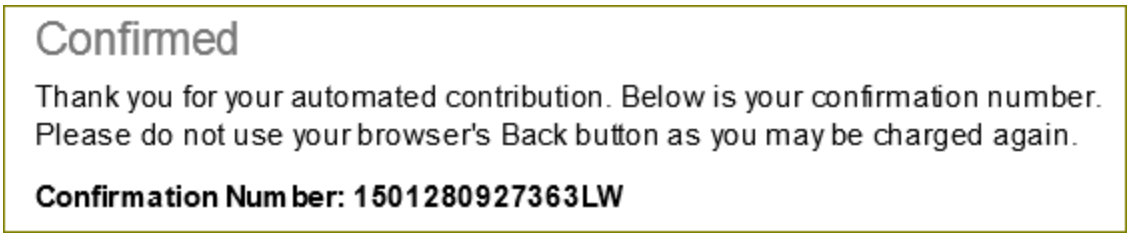
Name	**Bob Johnson**
E-mail Address	**linda.johnson@shelbyinc.com**
Home Phone	**9017572372**
Address	**7345 Goodlett Farms Parkway**
City/State/Zip	**Cordova, TN 37922**
Country	**United States**
General Tithe	**$10.00**
Total Contribution:	**$10.00**
Payment Method	**Bank Account**
Bank Name	**First Bank**
Account Type	**Checking**
Account Number	**234578238475**
Routing Number	**555555550**

By clicking the 'finish' button below I agree to allow Passage Community Church to debit the amount above from my account. I acknowledge that I may update the transaction information at any time by returning to this website, or by calling the Finance Office.

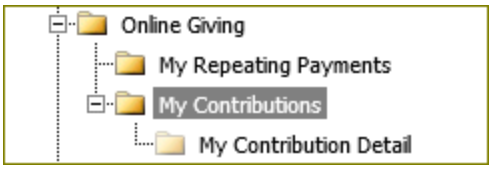
Previous | Finish | Cancel

If using a credit card enter the card information.

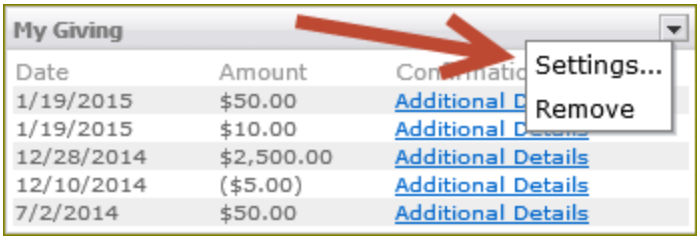
Once complete, a confirmation window displays.



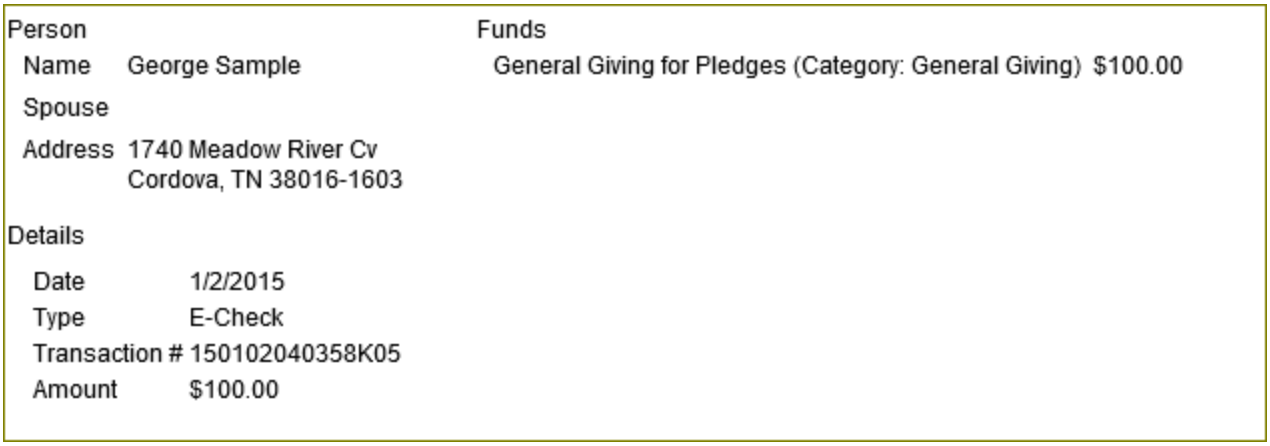
The **My Contributions** page displays historical contributions for the current contributor. This page requires the contribution list module that has several module settings such as the number of years of history to display.



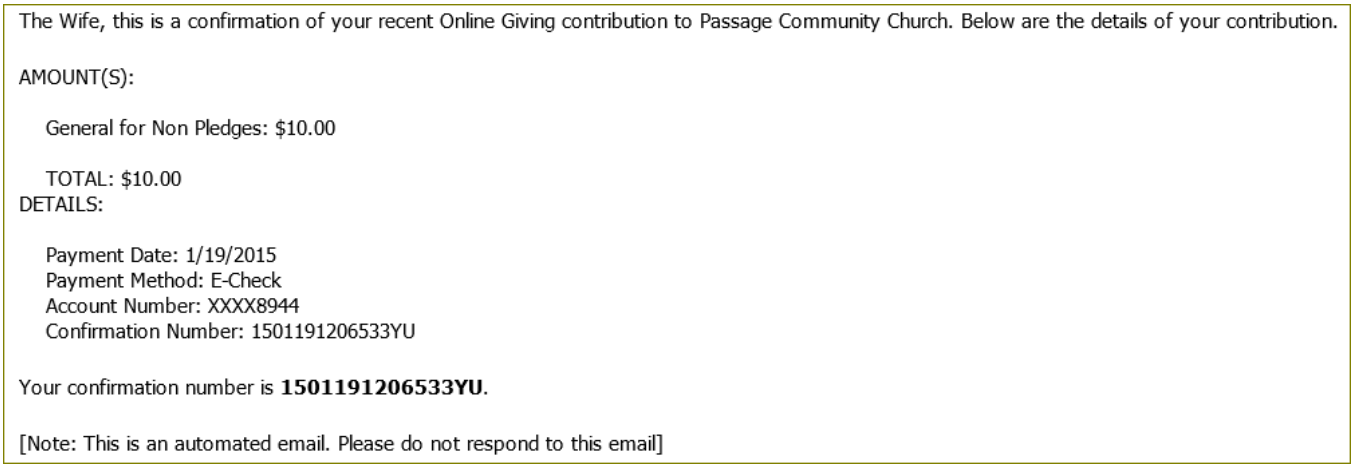
Contributors can select the number of transactions to display and click the ***Additional Details*** link to display individual transaction details.



The **Contribution Detail** page displays individual transaction details. This page requires the **Contribution Detail** module.



Once the online contribution is complete, your contributor receives a confirmation email based on the **Online Giving Contribution System Email**.



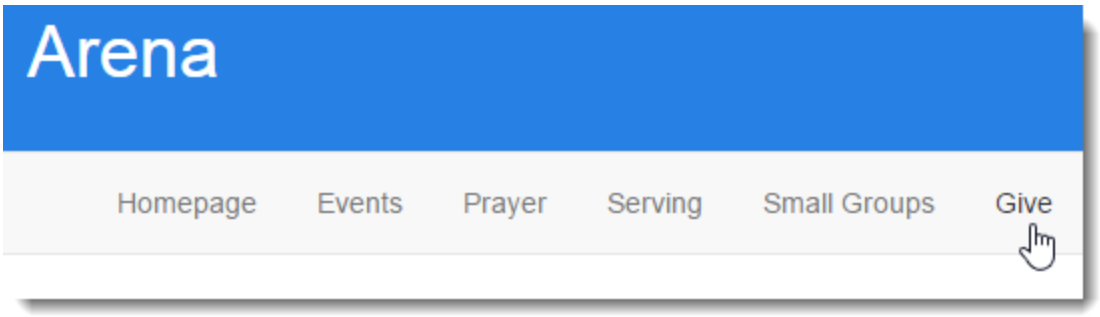
My Payment Profiles

The My Payment Profiles page works with **ShelbyNext | Giving** and allow users to modify or

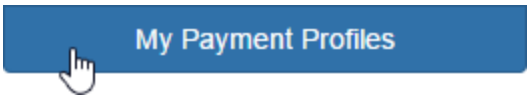
delete their **ShelbyNext | Giving** payment profile.

This new functionality automatically appears on the **Arena** online giving portal. The donor must be on the **Give Online** page in order to navigate to this option. Follow the steps below to make changes to payment profiles.

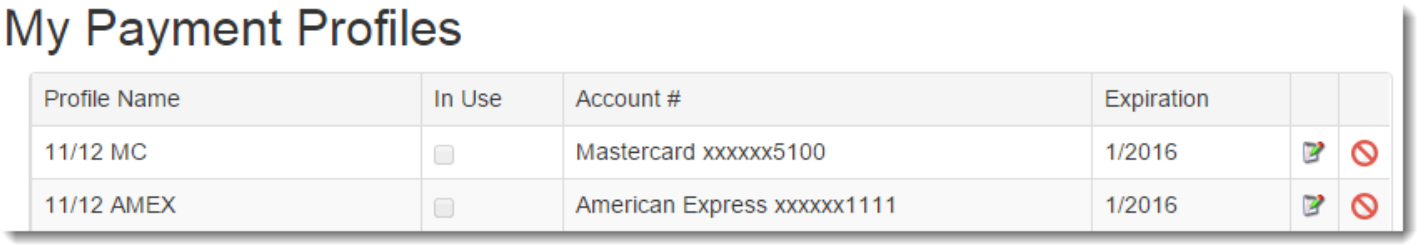
1. After logging in to your Online Portal, select the **Give** option.



2. Select the **My Payment Profiles** option from the right-navigation pane.



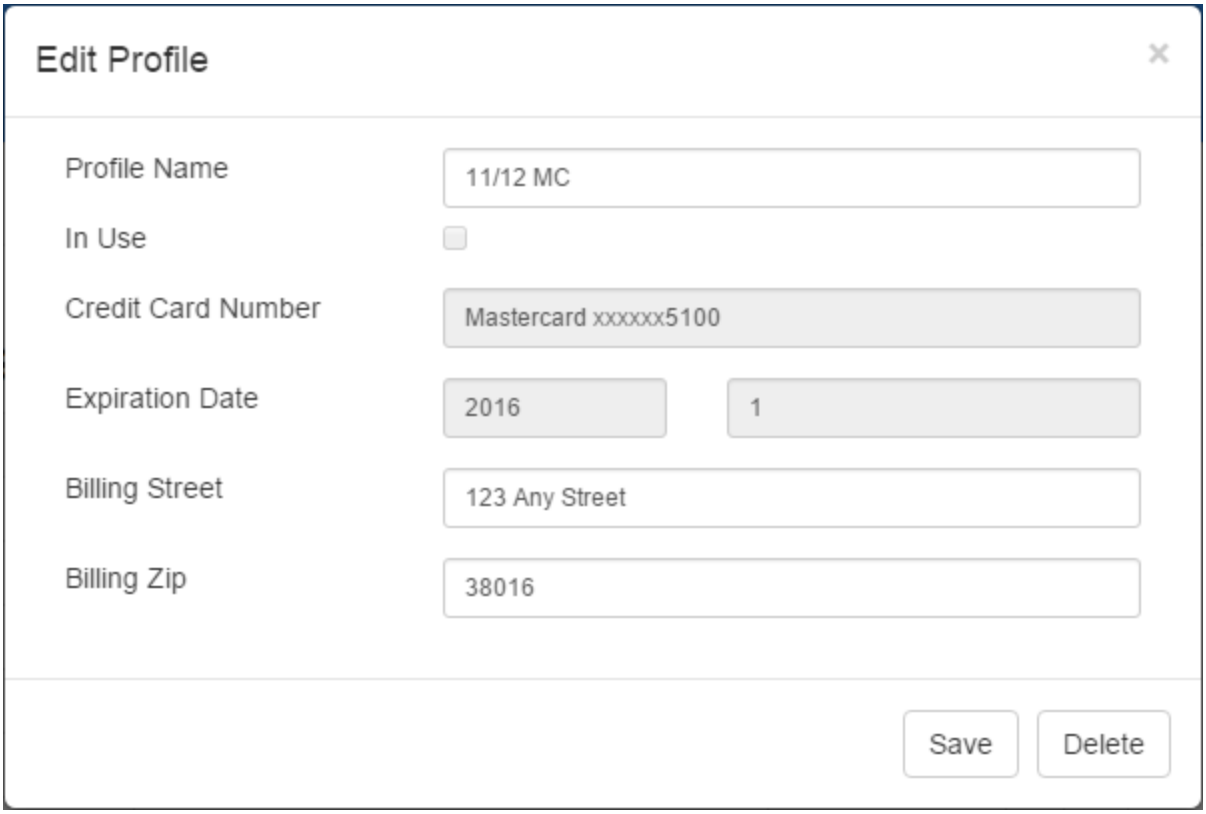
3. Your Payment Profiles are listed.



4. Click the **Edit** icon for one of your profile names. The **Edit Profile** window appears. You can modify the **Profile Name** (It is a nickname that the user decides), the **Billing Street**, and the **Billing Zip**.

The **In Use** check box, **Credit Card Number** field and **Expiration Date** fields cannot be changed because they are stored on the gateway.

NOTE: The **In Use** check box is checked when there is a recurring gift that is using this profile.

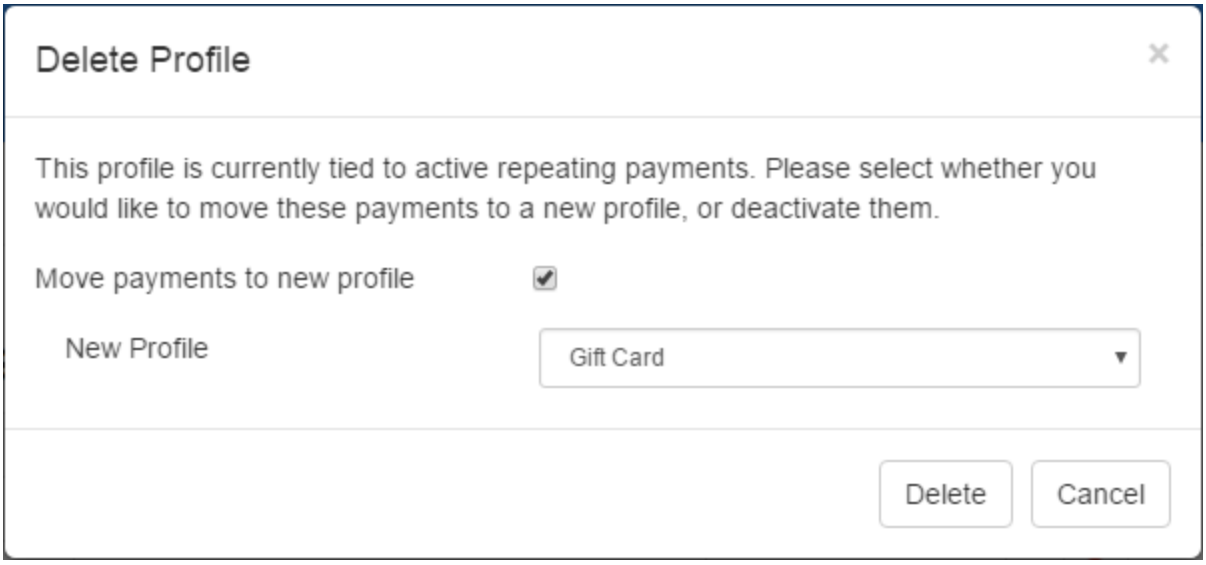


5. Click the **Save** button when you are finished making your modifications to the profile.

Deactivate

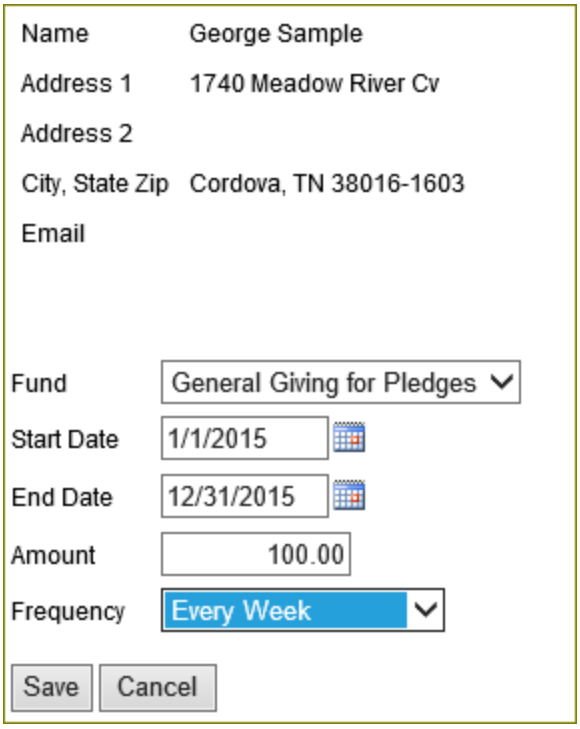
Clicking the **Delete** button from the **Edit Profile** window is the same as clicking the **Deactivate** icon from the **Payment Profiles** grid. After deactivating a payment profile, that payment profile no longer shows as a payment option. This ensures that the card is not used anymore.

If you deactivate a payment profile with a recurring gift, the recurring gift may be deactivated as well. You have the option to move the recurring gift to a different payment profile by selecting the **Move payment to new profile** check box. If you uncheck the **Move Payment to new profile** check box then both the payment profile and the recurring gift is deactivated.



Pledge Entry

The **Pledge Entry** page allows members to enter online pledges with the option to create a repeating payment. This page should be located as a child page of your Member Homepage and should be visible in navigation. This page requires the **Pledge Quick Entry** module and has no module settings.



Online Volunteer Opportunities

The **Volunteer Opportunities** page allows visitors to browse and register for a volunteer position (Serving Tag) and email the Tag Owner(s) to notify of the prospective volunteer. This can minimize the work of staff and make your membership more aware of the opportunities to serve.

In addition to customizing the four pages/modules, use the below checklist to configure this feature:

Verify desired **Serving Tags** are created.

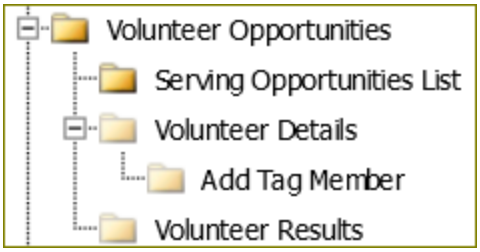
Start the **Process Critical Serving Agent**.

Customize the **Serving Opportunities** and **Volunteer Signup System Emails**.

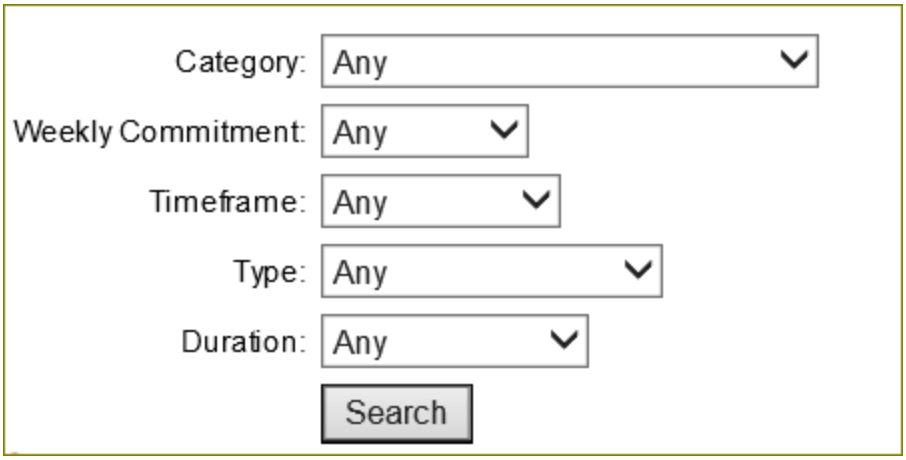
Customize the **Content Category**, **Weekly Commitment**, **Timeframe**, **Type** and **Duration Lookups**. All Lookups are filters to assist the prospective volunteers in the search for the best-fit position.

Customize the **Critical Profile Days** and **Warning Profile Days Organization Setting**. These settings automatically categorize prospective volunteers as critical when their tag status is not changed by the specified days.

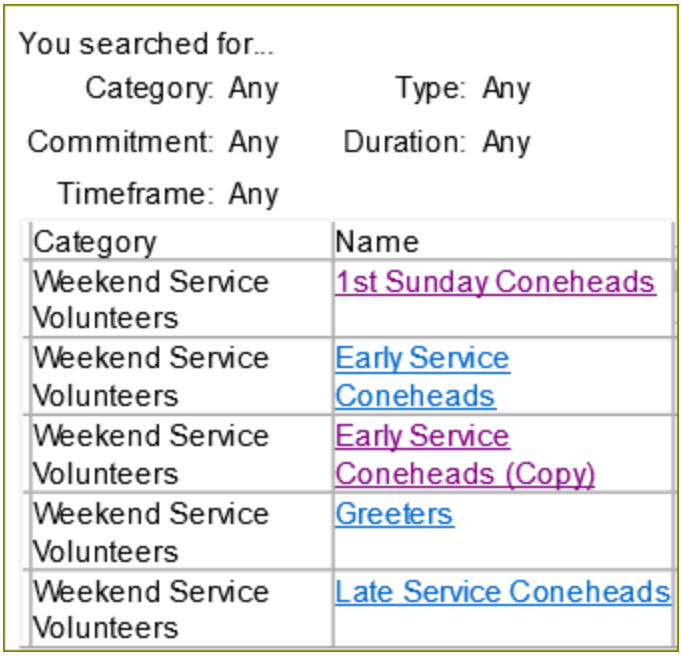
This feature requires five pages.



The **Volunteer Opportunities** page is the primary page prospective volunteers filter the search by category, weekly commitment, timeframe, type and duration. This page requires the **Serving Opportunity Search** module with the Volunteer Details and Volunteer Results pages selected. Use the optional Content Category module setting to specify tags to display based on content for situations where you want to display specific volunteer positions on different pages.



Volunteer Results page – This page displays all available serving opportunities (tags) that meet the selected criteria from the search page. This page requires the Serving Opportunity Search module.



Volunteer Details page – When a prospective volunteer selects a serving opportunity from the results page, Arena redirects the person to the **Volunteer Details** page where they can review the position details, experience level (requirements), schedule, and contact information. The prospective volunteer has the option to **Join the Team** or **Get More Information**.

Details: You will be assigned a specific location on the main campus rangi intersections in the parking area.
Experience Level Must be friendly and able to stand for up an hour, regardl appropriate attire for inclement weather
Schedule: 20 minutes prior and after your assigned service time.
Contact Info: Linda Johnson
linda.johnson@arenachms.com

Join the Team | Get More Info

Add Tag Member page – Once a prospective volunteer selects a serving position, they can complete the registration page. This page requires the **Profile Member Add** module with a default Source and default Status selected, both of which apply to all people joining the tag from this page. The option makes Volunteer Opportunities available in front of the Member Login with the option to login.

When the prospective volunteer completes the registration form, the record is added to Arena with the Pending Record Status, and the specified Tag Status. If configured, Arena sends an email notification to the Tag Owner of the prospective owner.

First Name
Last Name
E-mail
Birth Date
Marital Status Unknown
Gender
Street Address
City
State
Zip Code
Country
Home Phone
Work Phone
Cell Phone
Enable SMS
Submit

If you already have an account on our site, login to populate the fields to the left:

Login ID:
Password:
Sign In

Online Events and Promotions

Events are an active part of your organization's ministry. These events can be anything from VBS to a Women's Conference. The key to the success of these events and the resulting growth and development of your membership is event promotion, a function easily accomplished on your Arena-managed website. To implement the default on-line promotions and events on your website, you need ten pages. These pages are already in place. You next step is to review and customize these pages and modules to fit your organization.

While you can use Events without a payment gateway for events that do not have any associated fees, you need a payment gateway in order process payments. Arena has four integrated payment gateway providers.

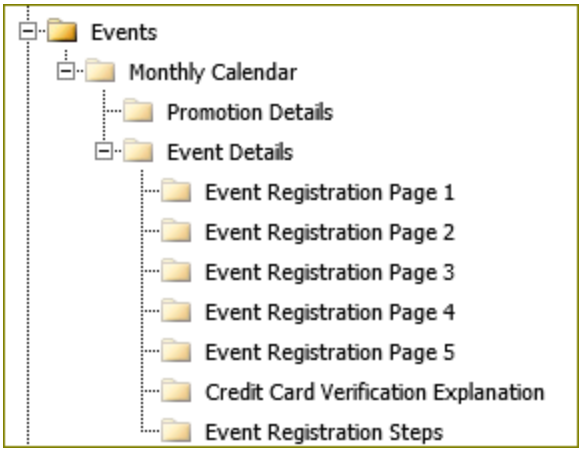
In addition to customizing the event pages/modules, use the below checklist to configure this feature:

Start the **Event Email** agent. If using the optional Facilities Management Resource, start the **Update Resource Events** agent.

Customize the **Event Refund** and **Event Registration Notification System Emails**.

Customize the **Event Registration Type**, **Event Tier Level** (if using), **Event Type**, and **Topic Area Lookups**.

Advise your contributors to not click the back button in the browser while completing the contribution. This action could result in duplicate payments.



Events page – This page is your user's primary access point to events. It displays a listing of your current events and allows users to navigate to the details and registration areas for each event. This page does not require a secure login so you can place it directly under your Home page and should be visible in navigation. There are several module options for this page such as the week view module and several promotion modules. Each module has modules settings that you need to

review and customize. Most modules have required module settings such as the Promotion and Event Details pages so that event registrants can click the available link and be redirected to the details page of the promotion or event.

This page requires the Event Week View module with your **Event Details** page selected. This module includes optional settings to filter by Campus, customize the number of days to show, filter by Topic Area Lookup and an optional Lookup filter. If the goal is to have multiple calendars, you can add another page, changing the Topic Areas.

Monthly Calendar page – This page displays all of the active and approved events in the current month in a calendar format. Prospective event registrants can click a link to display additional details. You can choose to display this page in navigation, hide it in navigation and use a hard-coded link or a redirect module to access it. This page requires the Event Calendar module with the Promotion and Event Details pages selected. (This module includes optional settings such using a different CSS, filtering by specific ministries (Topic Area Lookup), to display times or not, and to make Topic Area visible or not. If limiting by Topic Area, enter the Topic Area ID numbers in the Topic Areas field in comma-delimited format.)

Promotion Details page – The promotion detail page displays when a user selects a promotion that does not tie to an event tag. Its largest difference from the Event Details page is that a user cannot register for non-event-promotions, as they can for event promotions. This page should be a child page of your **Events** page and should be set to not display in navigation. This page requires the Promotion Detail Display module and has no required settings.

Event Details page – After a user selects an event, this page displays. The page should be a child page of your **Events** page and should be set to not display in navigation. This page requires the Event Details module with **Registration p**age set to Event Registration Page 1 in order for the user to begin the registration process.

Summer Retreat 2015

Register for this Event
Come join us as we the summer as a church family. A shuttle will run daily for those who like to leave the driving to us. This spectacular event will be full of inflatables, carnival rides, games, pony rides, face painting, petting zoo, special toddler play area, silent auction, music, food and more. Don't miss this fun family night and great outreach opportunity! Special Invite cards will be available in the kiosks located throughout the building; these are a great way to invite your neighbors and friends.

Share this with:

- Facebook
- Twitter
- Email

Date/Time: 6/14/2015 10:00 AM - 10:00 PM Add To Your Calendar

Contact: Suzy Sample
(901) 757-2372
linda.johnson@arenachms.com

Register for this Event

Event Registration pages – The default five Event Registration Pages are forms that a user needs to fill out when they register for an event online. They are very similar in their setup and should all be located as child pages of your **Event Details** page and set to not display in navigation. Each module is located on the page of the same name (e.g. the Event Registrations – Page 1 module is located on the **Event Registrations Page 1** page). For events not using a login in page, you have the option to use anonymous registration, where first and last name are required.

- **Event Registration Page 1** – This page displays the description and instructions from the Event Tag. This module requires you to select a **Login** page, **Event Registration Page 2**, and **Event Registration Page 3**.
- **Event Registration Page 2** – This module requires you to select an **Event Registration Page 1** and an **Event Registration Page 3.**
- **Event Registration Page 3** – This page displays the registration form. The module for this page requires you to select an Event Registration Page 1, Event Registration Page 2, and Event Registration Page 4. To remove the **Family Member** option, remove text from the Family Member Description module setting on this default page and module.
- **Event Registration Page 4** – This page displays the Registration Summary prior to processing any payments. This module requires you to select your Event Registration Page 1, Event Registration Page 3, Event Registration Page 5, and a default Member Status value for members who add themselves to your database from Event Registration. Optionally you can also select the Credit Card Verification Explanation page below as the CIN page. Consider setting the Membership Status to a unique membership status for this module to work in conjunction with your duplicate record strategy. You can then create a List and use

the Event Tag and unique Membership Status as criteria.

- **Event Registration Page 5** – This module only requires you to select an **Event Registration** Page.

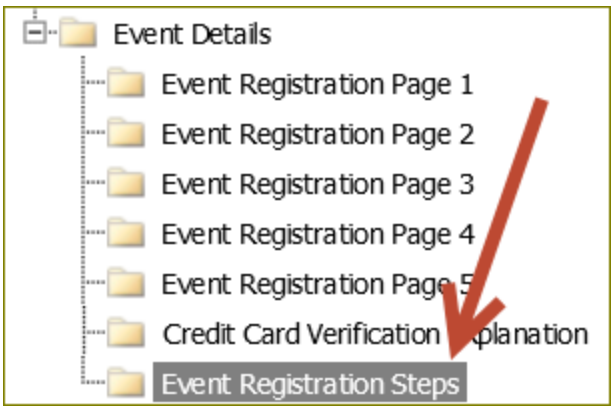
Credit Card Verification Explanation page – When a registrant pays any registration fees using a credit card, they need to enter the Card Identification Number (or CIN) printed on the back of their card. The specific location of this value and its purpose can be confusing to some users, so you can use this page to clarify any questions they might have about their CIN. This page should be a child page of your **Event Details** page and should be set to not display in navigation. This page requires the Advanced HTML Text module. You need to set this up with your own information. We suggest including an image showing the specific area of the back of a credit card, as commonly seen on online shopping sites.

If your organization elects to use the option to customize registration steps for all event tags, follow the below steps to configure:

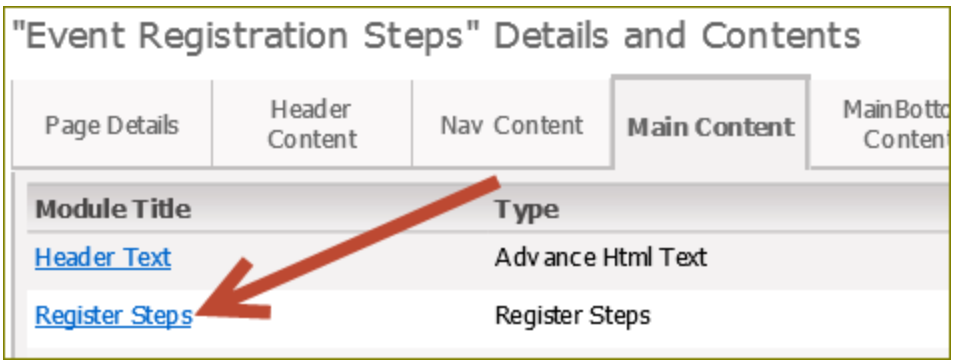
Confirm that the "Register Steps" module is available.

From the **Administration** menu, click the **Pages** option located under the WEBSITE heading.

Create a new page under your **Event Details** page (example page title: "Event Registration").



Add the **Register Steps** module to the new page.



On the **Event Details** module, change the **Registration** page module setting to point to your newly created page from step 3.

Refresh cache.

Online Event Calendar

The Arena Event calendar displays all active Events. In order for an event to display on the calendar, verify the following for each event:

The **Public Calendar Details** tab has the visibility set to **Public** and it is **Approved**.

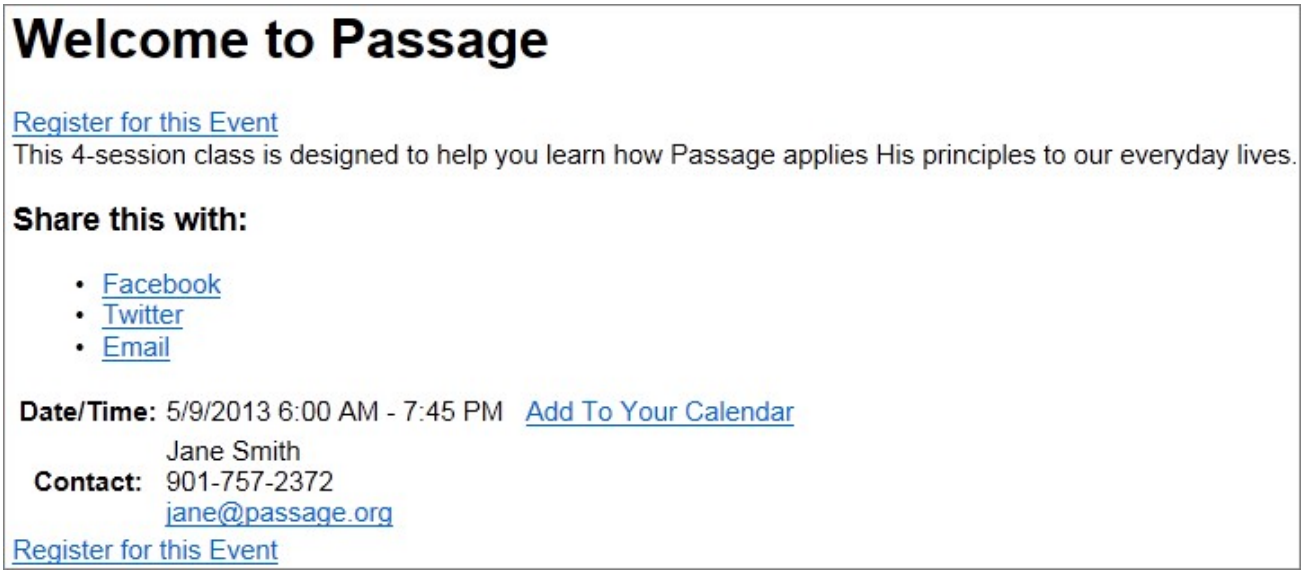
The **Start** and **End Dates** on the **Event Tag Registration** tab must be in the current timeframe.

Each event needs a **Future Occurrence** such as the first date of the event. If the event is over multiple days, create an occurrence for each day in order to display the event on the calendar.

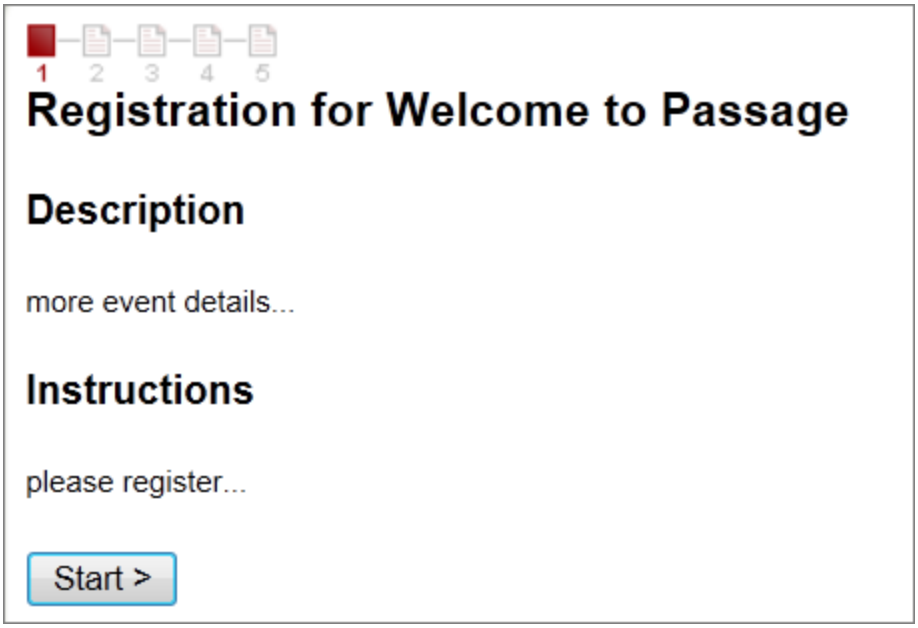
Registration for RSVP Event with No Fees

A RSVP event allows one person to complete a registration form for an event and if available, register others without having to complete a registration form for each additional registrant. This option allows you to obtain a head count for an event and charge for the individual registrants

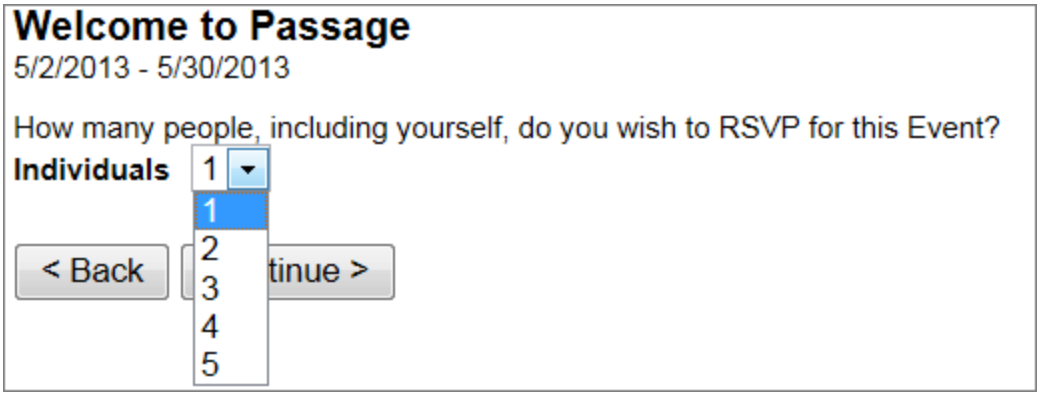
without adding additional records.



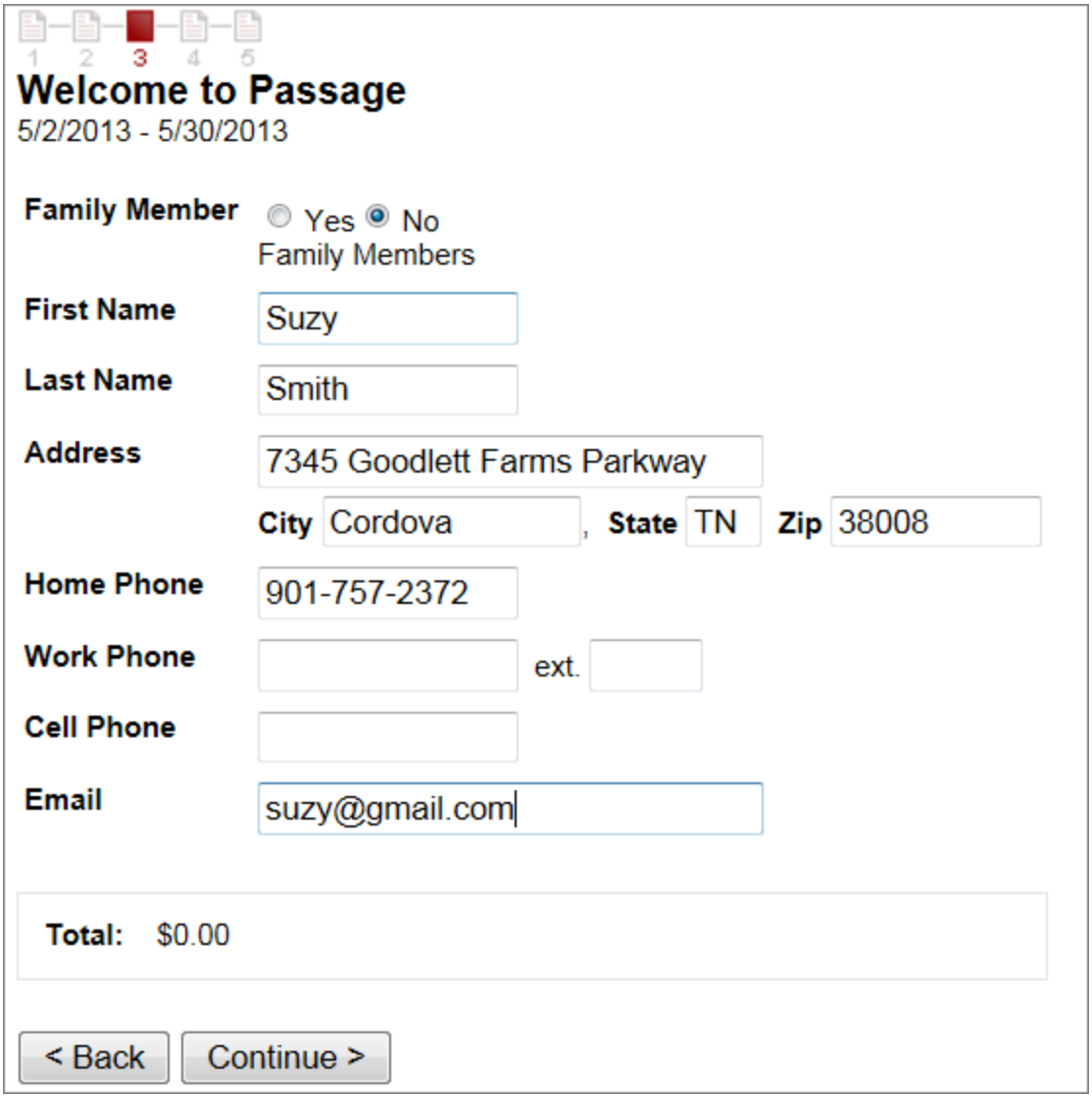
Event description and instructions display.



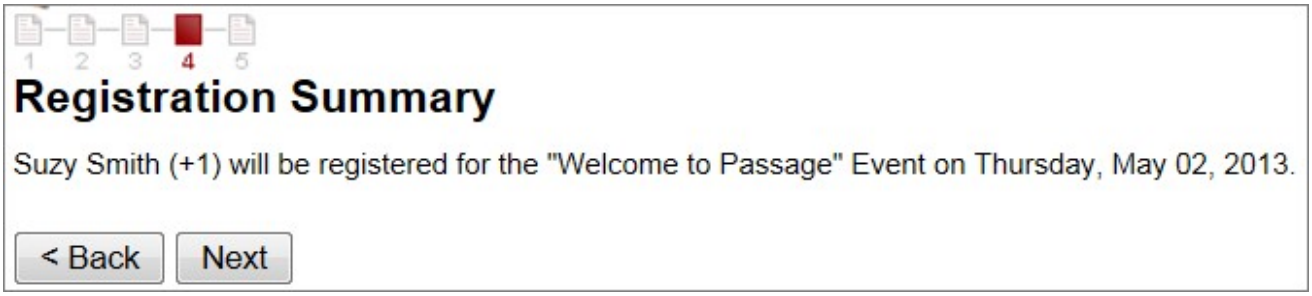
Registrant selects the total number of people to register. The **Allow Multiple Registration** option determines the maximum registrants per registration.



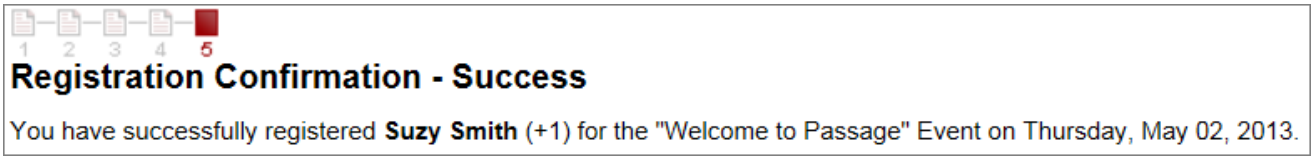
The registrant completes all required fields. Set required fields in Event Tag details.



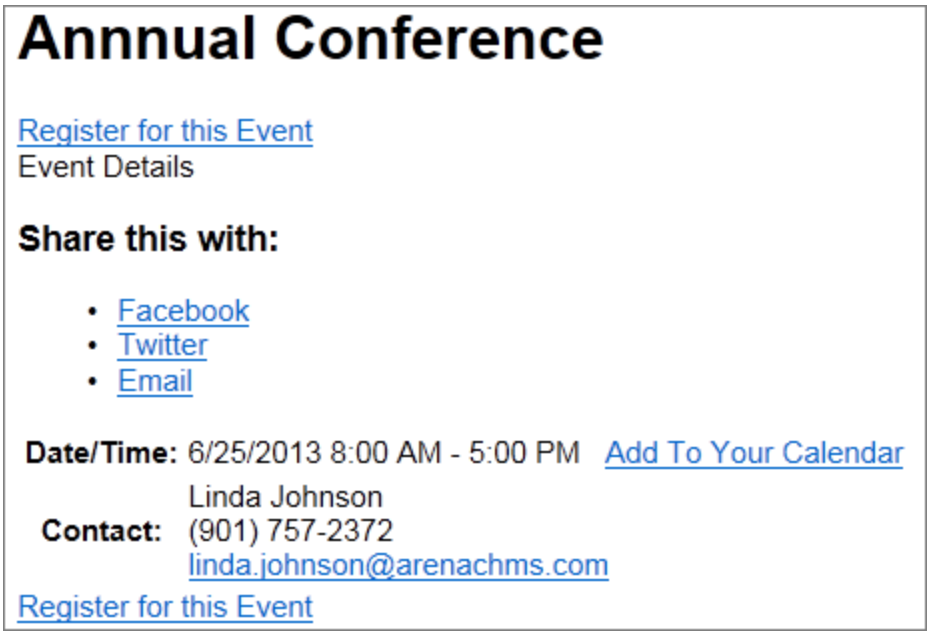
The Registrant reviews the registration summary and total number of registrants.



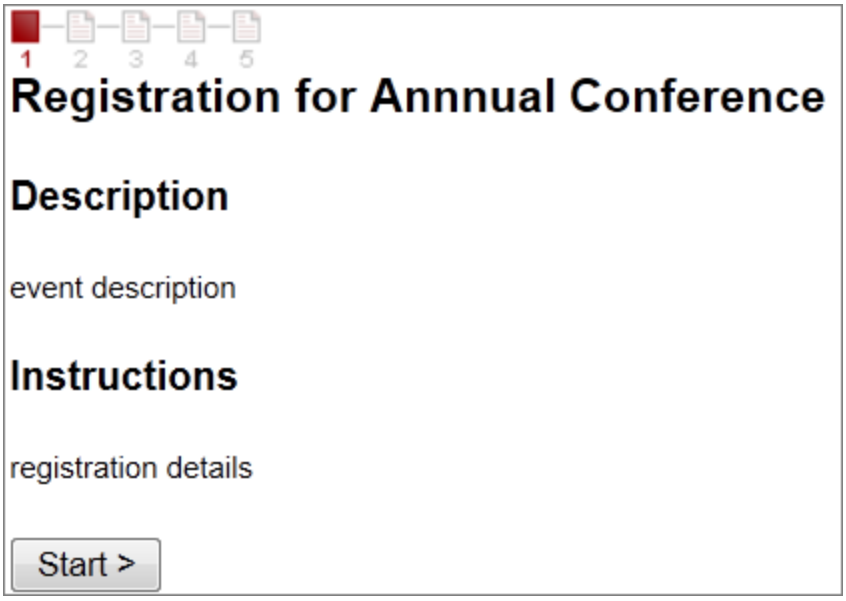
The Confirmation displays for the individual and total registrants.



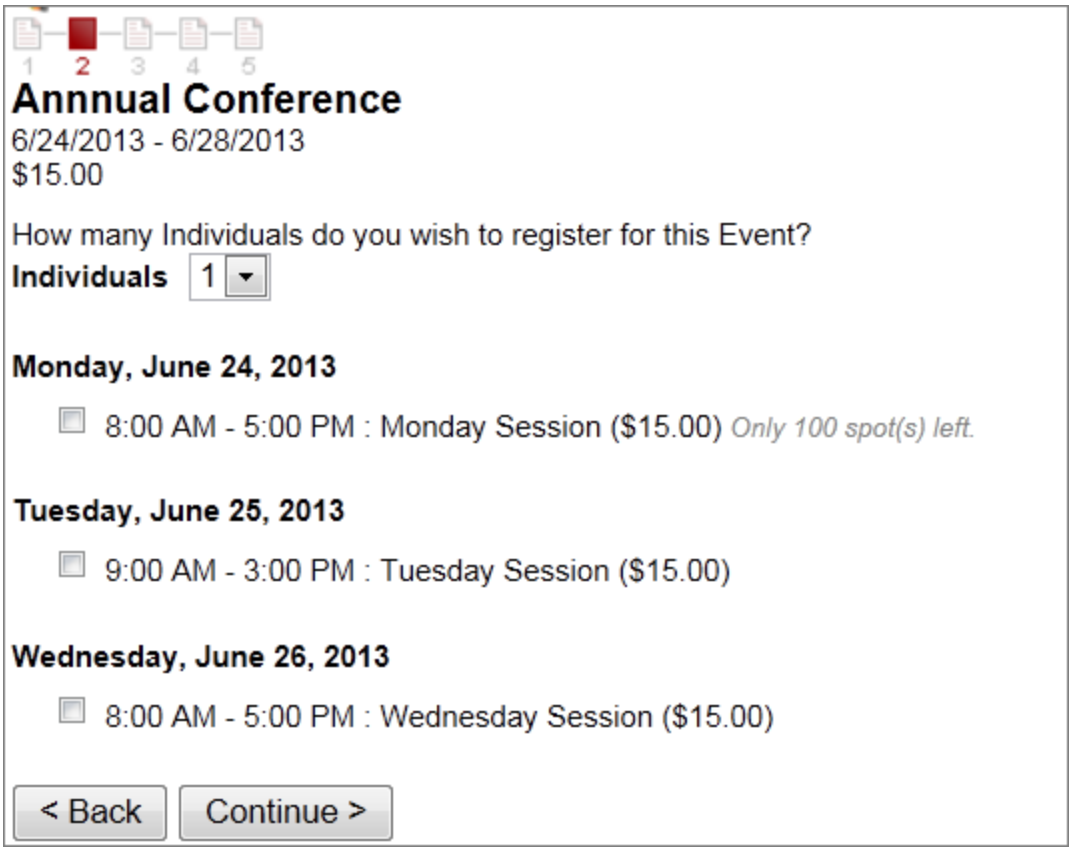
Event with Sub-Events and Registration Fees



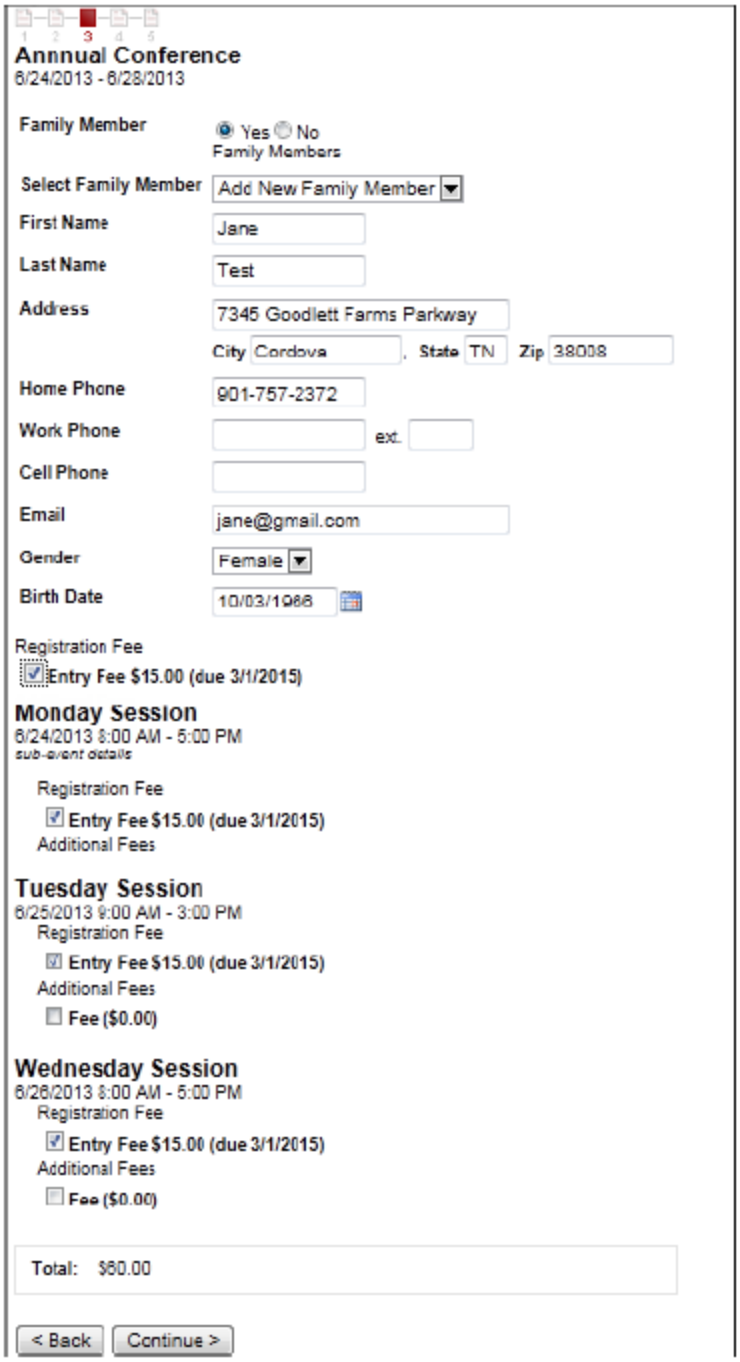
Event description and instructions display.



Registrant selects the number of registrants and any sub-events to which they want to register. Only Sub-Events with current dates are available.



Registrant completes all required fields. (Set required fields in Event Tag details.)



Registrant selects a payment option, enters the email address to send the registration confirmation, and selects the check box to post on the **Groups Social** page (optional).

1 2 3 4 5

Registration Summary

Jane Test will be registered for:

- Annnual Conference (6/24/2013 - 6/28/2013)
- Monday Session (6/24/2013 8:00 AM - 5:00 PM)
- Tuesday Session (6/25/2013 9:00 AM - 3:00 PM)
- Wednesday Session (6/26/2013 8:00 AM - 5:00 PM)

Individual 1: Jane Test

	Cost
6/24/2013 - 6/28/2013 : Annnual Conference **Entry Fee**	$15.00
6/24/2013 8:00 AM - 5:00 PM : Monday Session **Entry Fee**	$15.00
6/25/2013 9:00 AM - 3:00 PM : Tuesday Session **Entry Fee**	$15.00
6/26/2013 8:00 AM - 5:00 PM : Wednesday Session **Entry Fee**	$15.00
Total Cost for Jane	$60.00

Total Due: $60.00

Please Select a Payment Option:

Confirmation Email Address

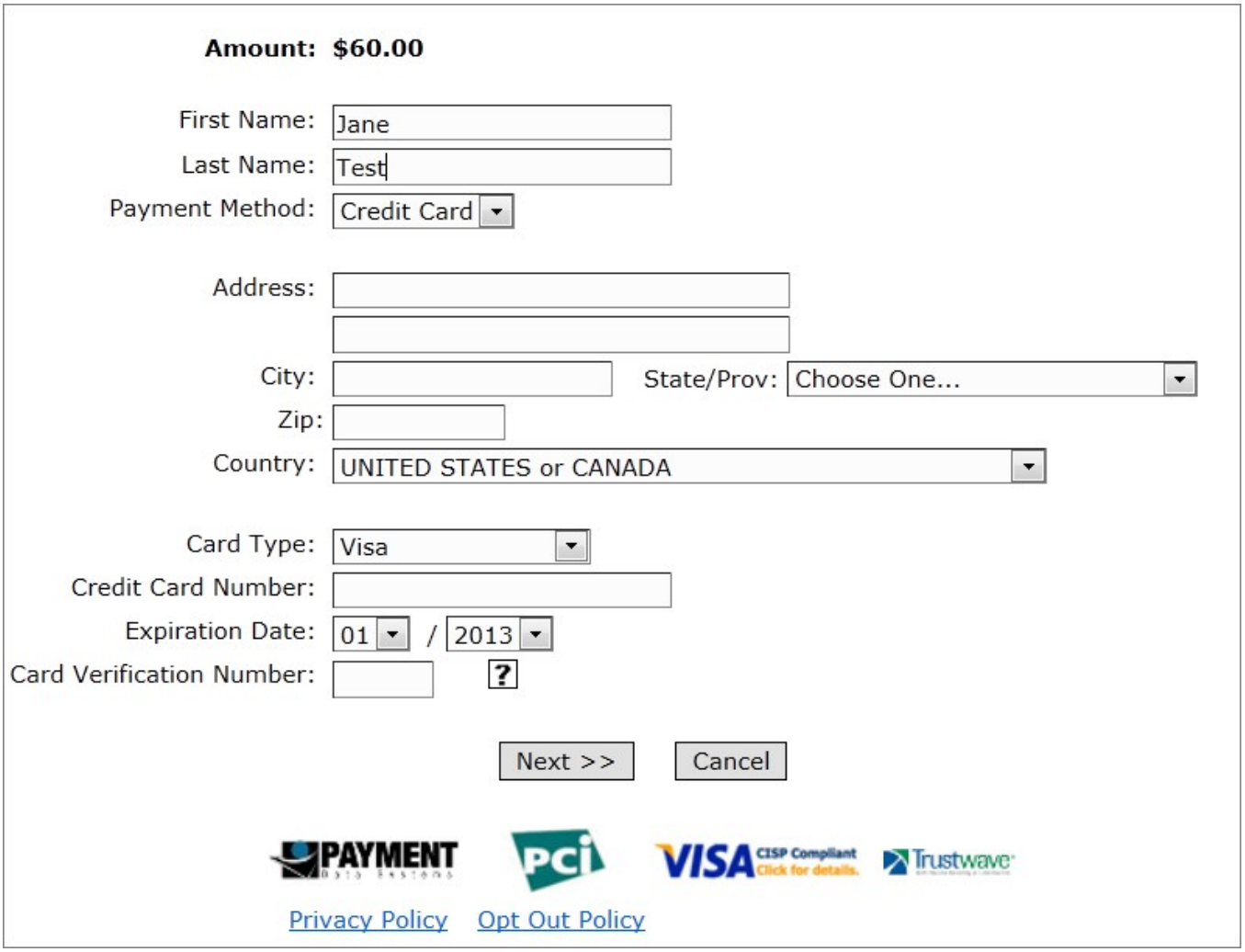
Enter the email address below that you'd like to have your registration confirmation emailed to.

jane@gmail.com

Post update to my wall

< Back Next

Registrant completes all required fields. Set required fields in Event Tag details.



Small Group Locator

Arena's Small Group Locator allows both organization members and non-members to register for a small group from the external Arena-managed website. Prospective Registrants can limit the search by using the available drop-down lists. Once the registrant applies available filters, the group(s) matching the criteria display. The registrant can then select a group from the list and complete the on-line form. Once the form is complete, Arena sends an email, as specified in the Cluster Type, to the group leader. The registrant can also display on the Group Leader Toolbox.

In addition to customizing the page/module, use the below checklist to configure this feature:

Start the Small Group Registrations Agent.

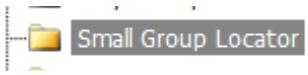
Customize the Group Leader Registration, Group Member Registration and Small Group Locator

System Emails.

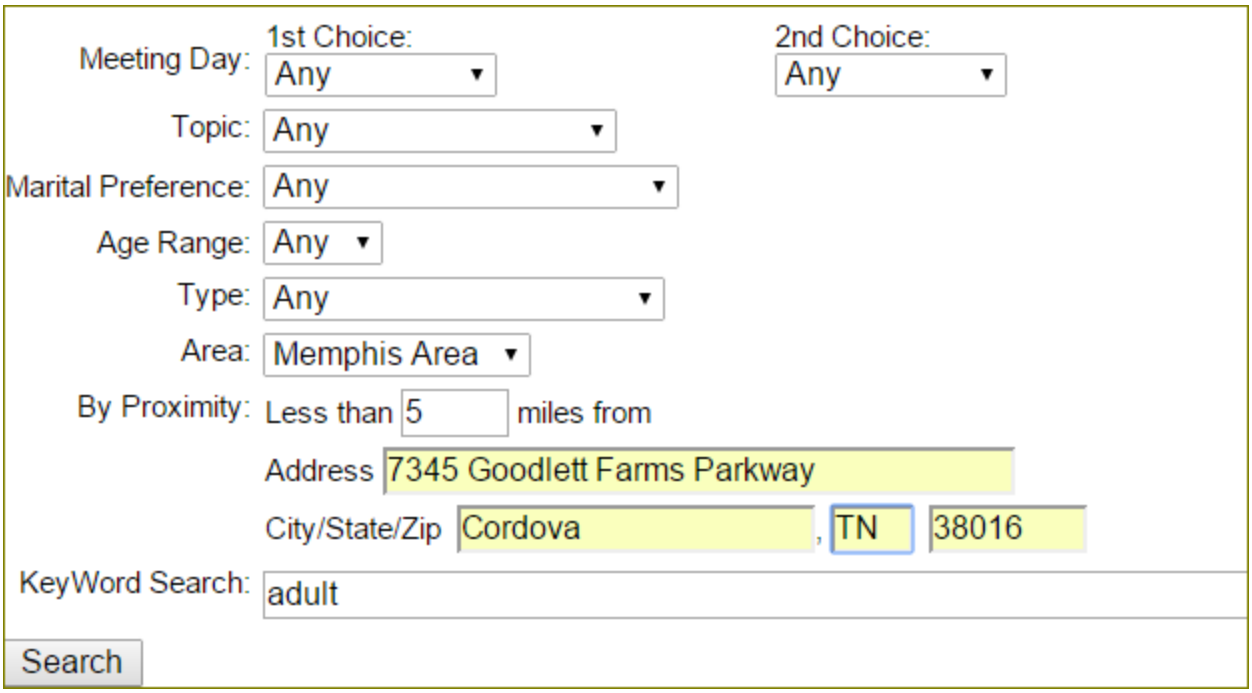
Customize the Meeting Day, Small Group Topic, Marital Preference, and Age Range Lookups. Some Lookups are used in other features.

Be sure all the Details of each group are complete, including an active Group Leader and the Location. You want to be sure addresses of Group Leaders are geocoded for home groups for the purpose of Arena accurately identifying Groups when proximity is used.

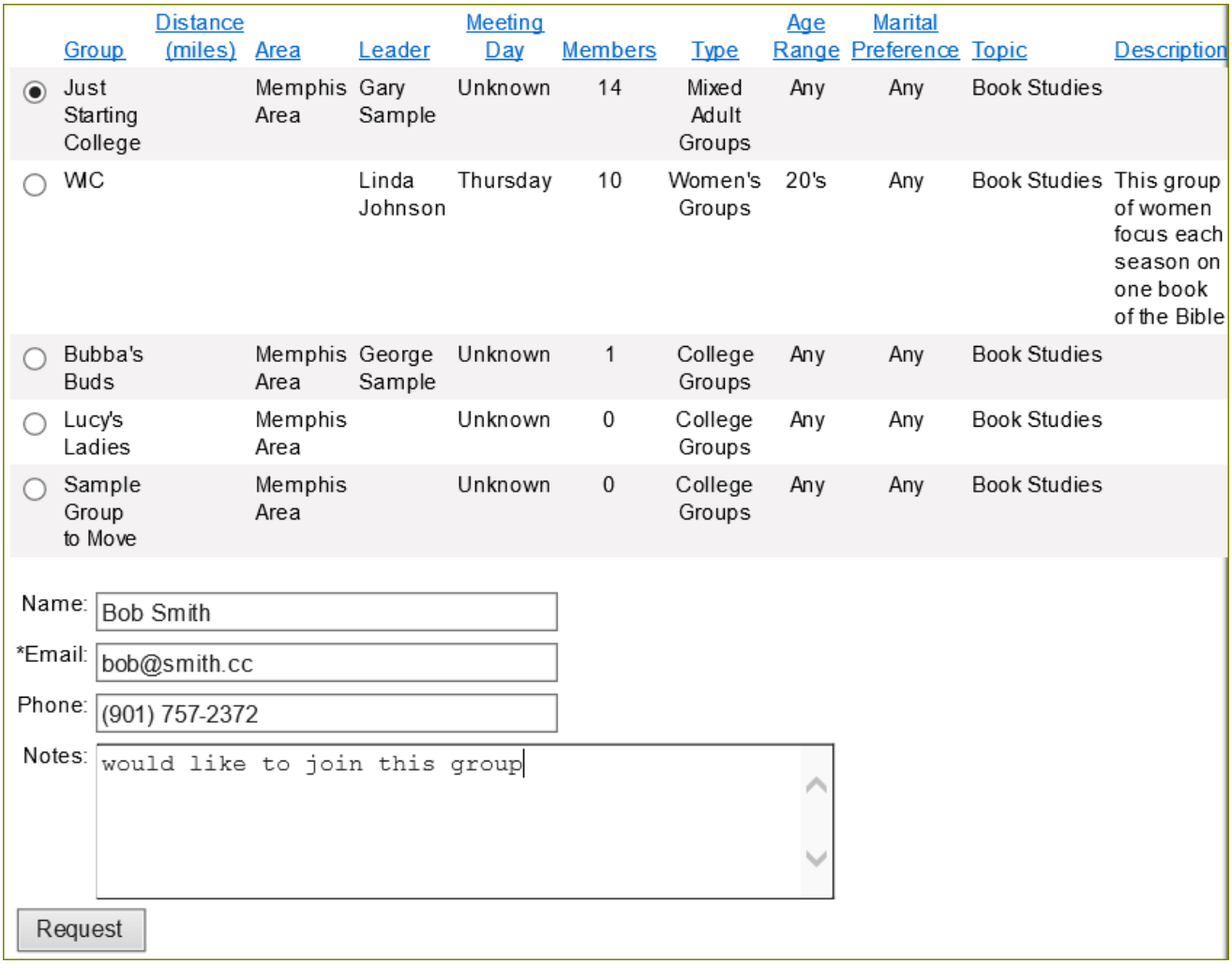
Customize the Group Locator Email Organization Setting.



Small Group Locator page – The Locator page uses the Small Group Locator module that requires the Small Group module set to a specified Small Category ID with the option to select specific Cluster Types. You need to customize all module settings. You can optionally add a new page with the same module to a different page to provide flexibility in which groups to make available on a specific page. Be sure to change to a different Small Group Category ID and Cluster Type. You can also create a specific page with an Advanced HTML Text module containing a "Thank you for your submission" message. The By Proximity option requires a complete address. The option is to use Group Areas. If not using Group Area maps, set the Show Areas modules setting to false.



Once the prospective group member applies any selected filters, the groups that match the results display. They can complete all fields and click the **Request** button. Arena sends an email(s) to designated Leaders and Group Admins.



Group	Distance (miles)	Area	Leader	Meeting Day	Members	Type	Age Range	Marital Preference	Topic	Description
Just Starting College		Memphis Area	Gary Sample	Unknown	14	Mixed Adult Groups	Any	Any	Book Studies	
WIC			Linda Johnson	Thursday	10	Women's Groups	20's	Any	Book Studies	This group of women focus each season on one book of the Bible
Bubba's Buds		Memphis Area	George Sample	Unknown	1	College Groups	Any	Any	Book Studies	
Lucy's Ladies		Memphis Area		Unknown	0	College Groups	Any	Any	Book Studies	
Sample Group to Move		Memphis Area		Unknown	0	College Groups	Any	Any	Book Studies	

Name: Bob Smith

*Email: bob@smith.cc

Phone: (901) 757-2372

Notes: would like to join this group

Request

Group Leader Toolbox

The Small Group Leader Toolbox is a powerful tool to give Group Leaders access to the group members in order to communicate via email or Text Message (SMS), take attendance, view the attendance history of group members, and process group registrations.

This features has thirteen pages, with some visible and some not visible in navigation.

In addition to customizing the page/module, use the below checklist to configure this feature:

Start the Small Group Registrations Agent.

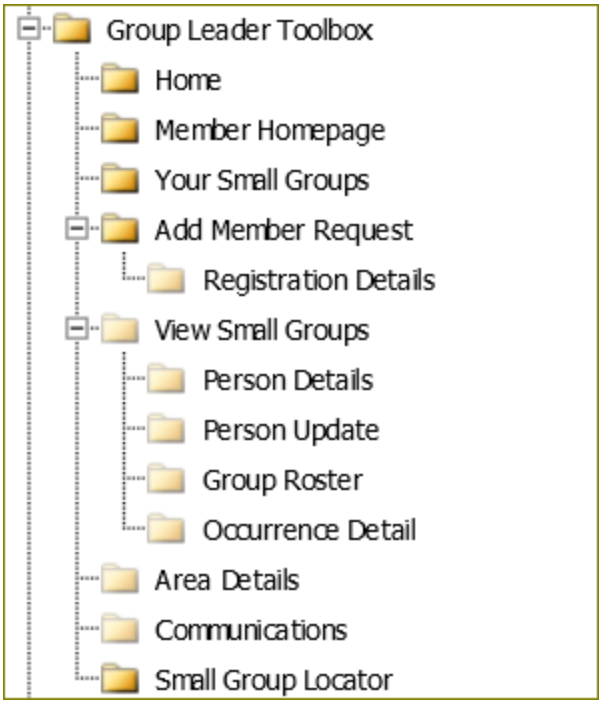
Customize the Group Leader Registration, Group Member Registration and Small Group Locator System Emails.

Customize the Meeting Day, Small Group Topic, Marital Preference, and Age Range Lookups. Some

Lookups are used in other features.

Be sure all the Details of each group are complete, including an active Group Leader and the Location. Be sure the addresses of Group Leaders are geocoded for home groups for the purpose of Arena accurately identifying Groups when proximity is used.

Customize the Group Locator Email Organization Setting.



Group Leader Toolbox page – This page displays the details of the group or groups the user is a leader of, and allows the user to select a specific group. This page should be located in a secure area of your website, and should be visible in navigation (or linked to by a hardcoded link). This page requires the Group List module with Public Site set to true, the proper Category ID specified, and your **View Small Groups** page selected as your Group Detail Page setting. With the Public Site set to True, the tree view does not display.

Add Member Request page – This page is for when the leader does not have permission to add members directly to the group. Instead, the **Add Member Request** page is a form the leader completes, and Arena sends an email to a designated email address (either a staff member or a volunteer) who then manually adds the member to that leader's group. This page should be located as a child of your **Group Leader Toolbox** page, and should be visible in navigation, if using this method. This page requires the HTML Email Form module with the From and Recipient email addresses selected, the Instructions to be displayed at the top of the email entered, the email's Subject line entered, and the HTML formatted form entered in the Details area of the module settings.

View Small Groups page - Once a user selects a small group on the **Group Leader Toolbox** page, Arena directs them to the **View Small Groups** page where they can view and administer all of the details of the group. This page should be a child page of your **Group Leader Toolbox** page.

It should not display in navigation and requires a specific group ID. Some settings are required, while others are optional. This page requires the Small Group Details module with **Person Details** page set and the Public Site set to True; the Pending Registrations module with the **Registration Details** page set and the Public Site set to True; and the Small Group Tab module with the Area Details, Default Occurrence Type ID, **Occurrence Details** page, your **Registration Details** page set, and the Public Site set to True. Review and customize the Small Group Tab Control module settings.

Person Details page – This page displays the **Person Detail** page of a group member. This page should be a child page of your **View Small Groups** page and should not display in navigation. This page requires the Person Details module with the Public Site setting set to True. (An important note to remember is that all Person Details modules follow the same field security settings, as set in the Administration area of the Arena application, so long as the Secure Fields module setting is set to true.)

Person Update page – This page displays if the leader does not have permission to edit a member's **Person Detail** page directly. The person uses the **Person Update** page to make any changes. The pages link from the **Person Details** page by selecting it in the Person Details module settings. It should be a child page of your **View Small Groups** page and set to not display in navigation. This page requires the **HTML Email Form** page with the From and Recipient email addresses selected, the Instructions to be displayed at the top of the email entered, the email's Subject line, and the HTML formatted form entered in the Details area of the module settings.

Group Roster page – This page displays the **Group Roster** page with details such as their pictures, addresses, and phone numbers. This page should be a child page of your **View Small Groups** page and should not display in navigation. This page requires the Small Group Roster module and has no required module settings.

Occurrence Detail page – This page displays the **Occurrence Detail** page. This page should be a child page of your **View Small Groups** page and should not display in navigation. This page requires the Occurrence Details module with the Public Site setting set to True and the Area Detail, Event Detail, Group Detail, Occurrence Type, and Profile Detail pages selected.

Registration Details page (Self-hosted only) – This page displays a registrant's selection(s) and the leader can assign them to the group. This page should be a child page of your **View Small Groups** page and should be set to not display in navigation, as it requires a registration ID be passed to it. This page requires the Registration Details module with your **View Small Groups** page selected as the **Cluster** page and the **Area Details** page selected.

Area Details page – This page displays geographic information about the group and its members. This page should be a child page of your **Group Leader Toolbox** page and should not display in navigation. This page requires the Area Details module with your small group Category ID entered, external **Person Details** page selected, and your **View Small Groups** page selected as the **Area List** page.

Communications – This page displays the **Communications** page where leaders can create email communications. This page should be a child page of your **Group Leader Toolbox** page and should not display in navigation. This page requires the Mail Merge module, and has no required settings.

Optional Components

Home – As a child page of your **Group Leader Toolbox** page, use this page as a redirect to your website home page so members can easily navigate back to that page. This page requires the Redirect module with a page link to your home page.

Member Homepage – Just like the **Home** page link above, the Member Homepage is also a redirect, this time to the Member Homepage for ease of navigation. This page requires the Redirect module with a page link to your Member Homepage.

Your Small Groups – This page is a redirect back to the **View Small Groups** page. This page requires the Redirect module with a page link to your **View Small Groups** page specified in the module details.

Small Group Locator – This page is a redirect to the **Small Group Locator** page, if you have chosen to implement this structure. This page requires the Redirect module with a page link to your **Small Group Locator** page specified in the module details.

Group Leader Toolbox Security

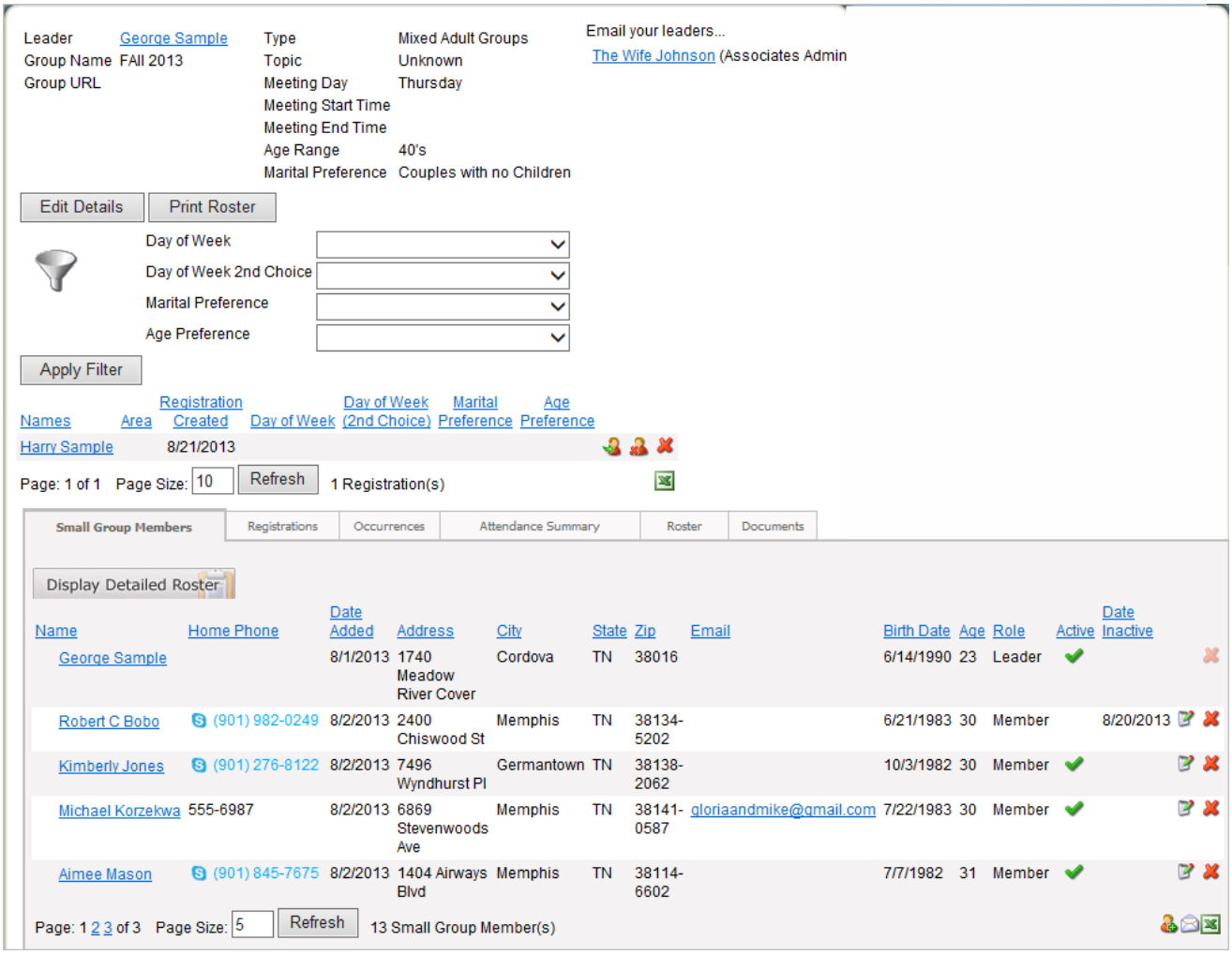
While security for Group leaders can vary, below are some suggestions:

To allow Group Leaders to edit Group Role and Group Status, set View permissions for the Small Group List module.

To add new group members, the leader needs permission to the Add Member Request form.

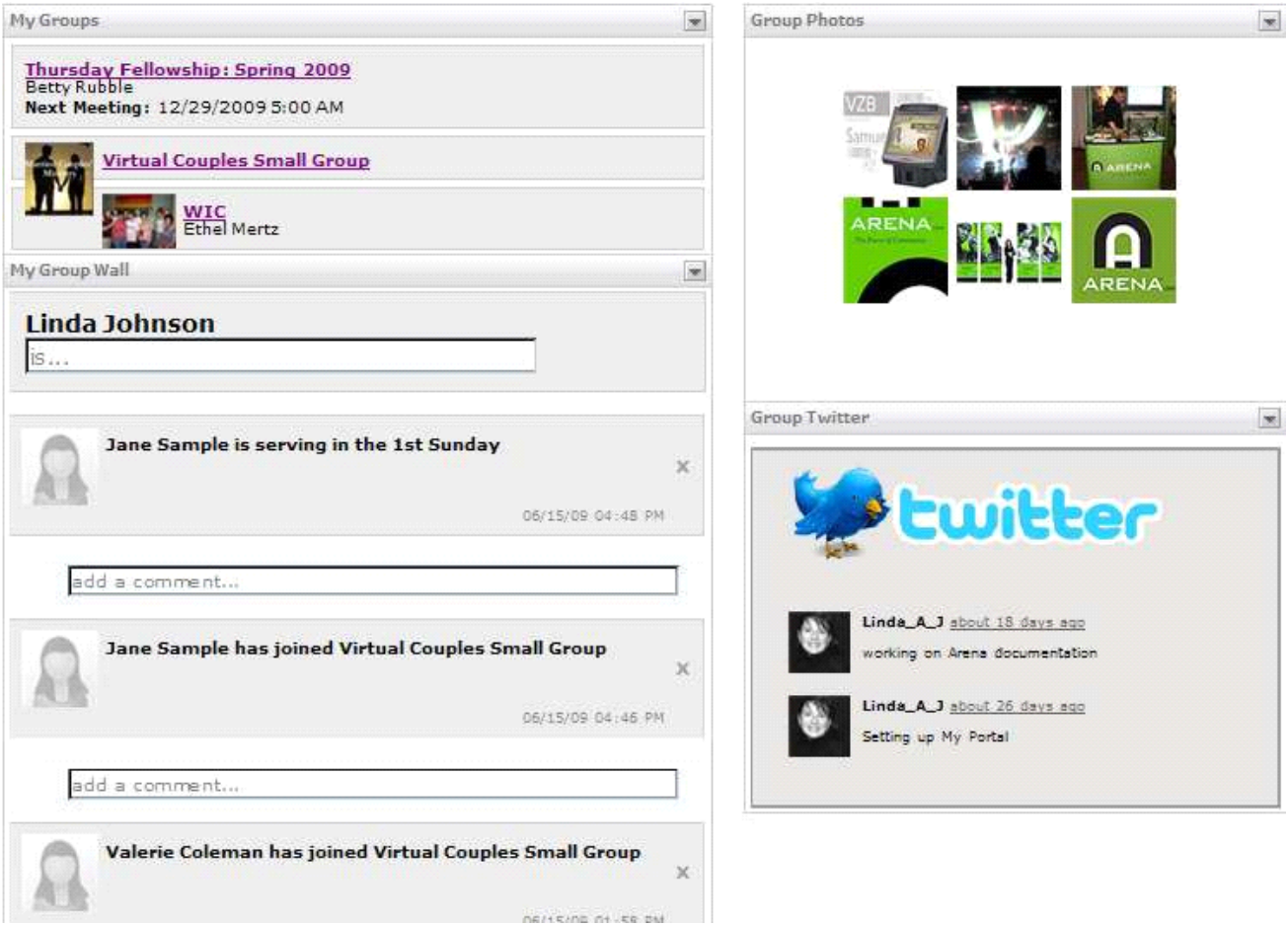
Group Leader Toolbox

From the **Leader Toolbox** page, Leaders can edit the details of the group, emails group members, take attendance, print a roster, process group registrants, and change the status of a group member.



My Small Groups

My Small Groups provides you with the ability to create a single page specific to each user where they can view and access their small groups, group wall, group roster, group twitter, and group Flickr photos. For illustration purposes, the setup instructions to follow are for an Arena-managed website, using the default structure and templates.

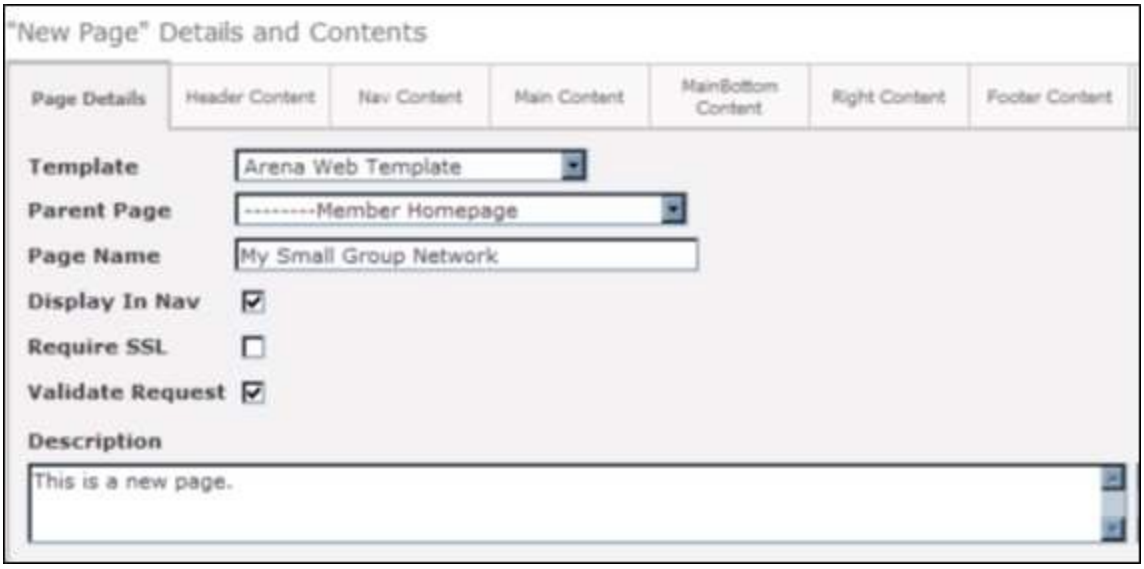


Steps to implement

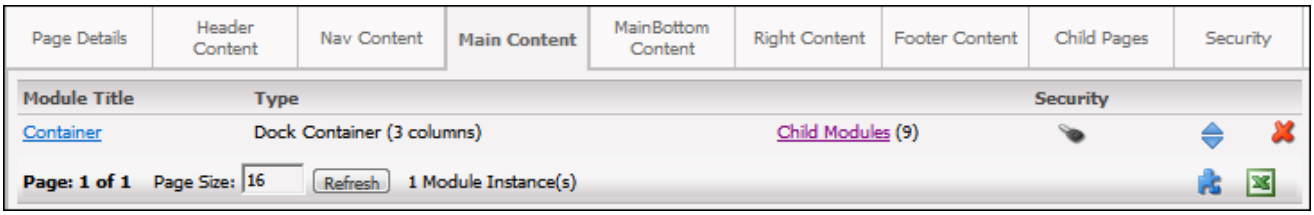
1. From the **Administration** menu, click the **Pages** option located under the WEBSITE heading. Expand **Web Pages** then **Homepage** then **Members** and finally **Member Homepage**.

2. Click the **New Page** branch.

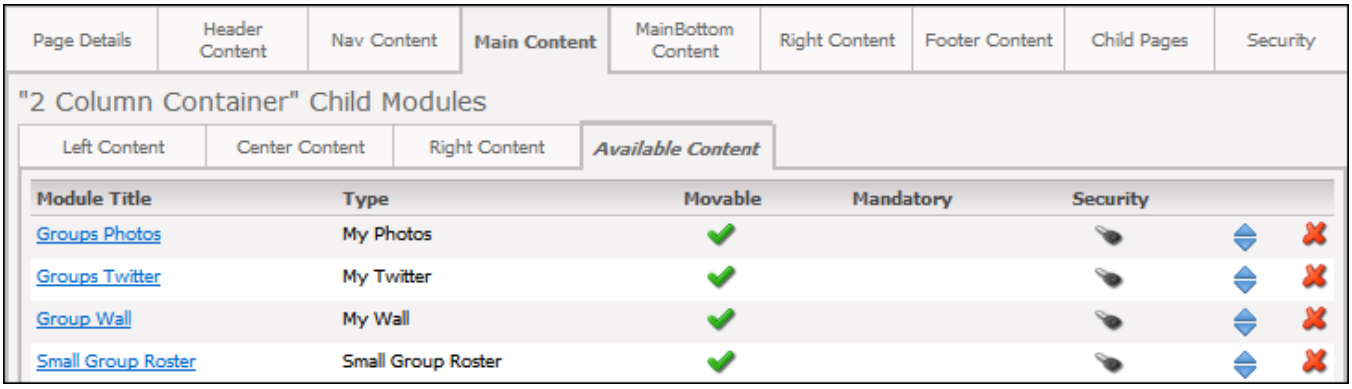
3. Customize the **Page Name**.



4. Add a container module.



5. Add modules. Consider adding modules to the **Available Content** tab allowing each user to select which feature to add to the page and making placement adjustments.



- **My Groups** – This module displays all public groups where the logged-in user is a member, leader or administrator.
- **Groups Photos** – This module displays photos from a specified Flickr account.
- **Groups Twitter** - This module displays the Group's twitter feed. If there is no Group Twitter feed setup and the logged in person is the group leader, the leader can input the account information. If you enter just a username, the latest 20 tweets by that username displays. If you enter the full credentials, you see the user's complete time-line (their messages and messages from the people they are following). The urls, usernames and hash tags (#wwdc)

are clickable and go back to Twitter. You can also use this module with no group via module/module setting.

- **Group Wall** – This module displays a group wall where activity of members displays such as when a group member enters a prayer request, registers for an event, volunteer opportunity, etc.
- **Small Group Roster** – This module displays the photo and contact information for group members.
- **My Photos** – This module displays the Group's Flickr feed. It shows the latest 45 pictures (configurable) by default. Like the Twitter module, the group can input its info here if not entered on the administration side. There are two modes for this module. The default mode is going to Flickr when a user clicks on an image (new window). The other mode is showing a larger image in an animation/viewer. Use the "Show Photo on Click" module.

6. Make the appropriate **Permission** changes for the page and each module.

Online Missions

The Missions feature allows people to register for a mission trip, non-travelers to make a payment towards a mission traveler, travelers to pay additional money towards their mission trip and anyone to make a general contribution towards the mission trip. Three pages are required. Mission Trips that have not met the maximum team size display. Approved travelers can make additional payments. Non-travelers can contribute to the Mission trip or to an approved traveler. Contributions made toward the mission trip creates a separate batch. This functionality is required to be behind the Arena Member Login.

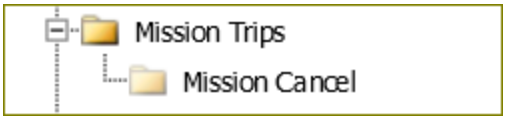
In addition to customizing the two pages and modules, use the below checklist to configure this feature:

Start the Mission Trip Deadline and Mission Trip Registration Reminder Agents.

Add a Payment Gateway provider. This is required for Missions.

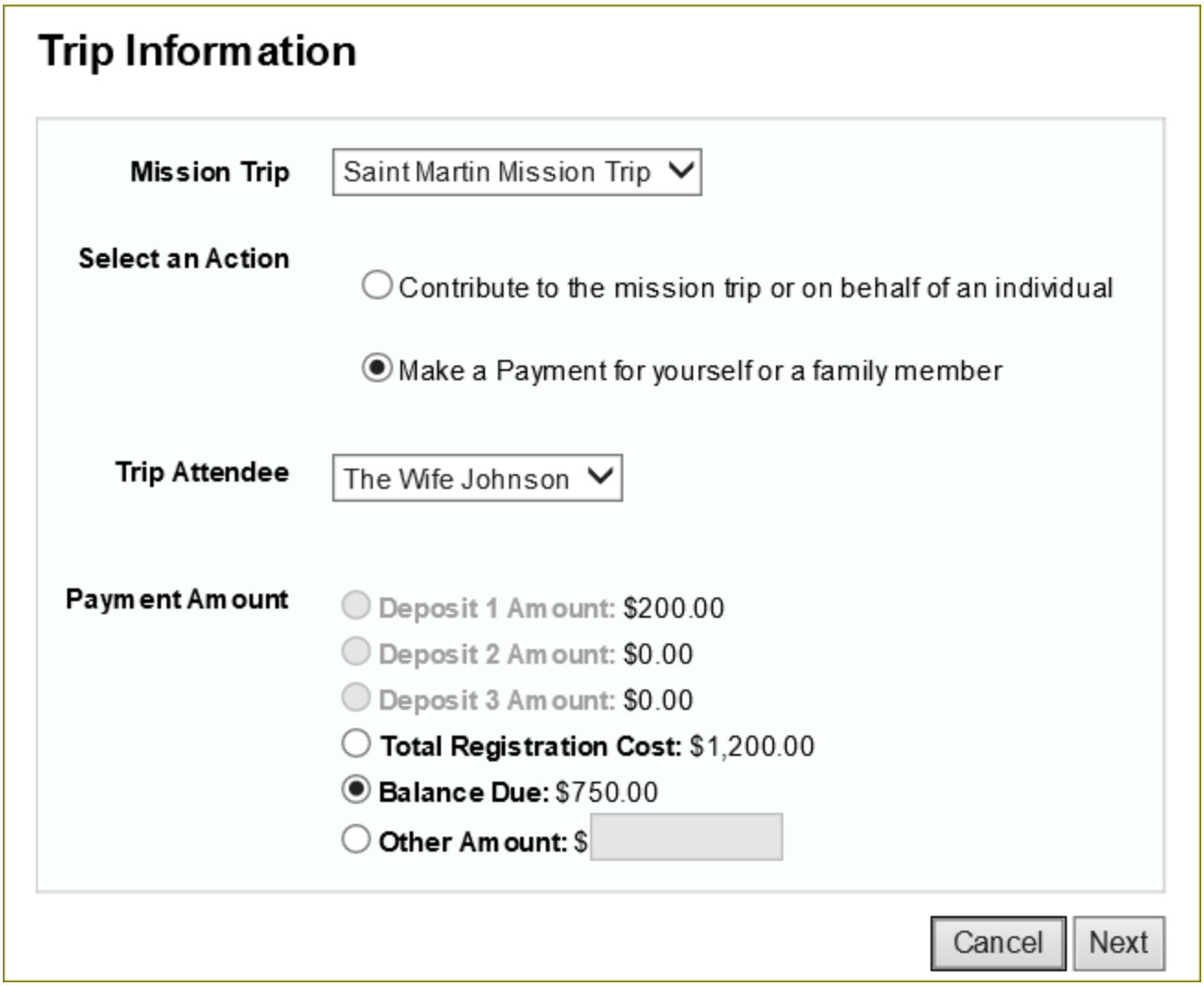
Customize the Mission Trip Registration Deposit Reminder, Mission Trip Registration Reminder and Mission Contribution System Emails.

Customize Mission Arrangement, Mission City, Mission Country, Mission Purpose, Mission Region, Mission Register Type, Mission Support Type, Mission Trip Role, and Mission Trip Status Lookups.



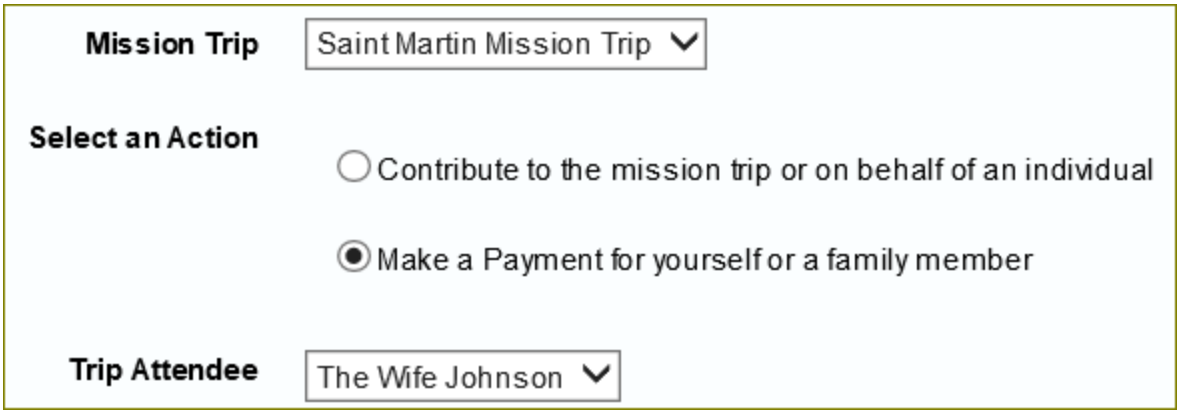
- **Missions** page – This page allows users to select a mission trip. This page requires the Mission Registrations module, selecting ACH and CC Payment Gateway Names and a redirect cancel page.
- **Mission List** page – This page lists all available Mission Trips. This page requires the Mission List module, where you can specify which trips to display.
- **Mission Registration** – This page confirms registrant information. This page requires the Mission Registrations module, with ACH and CC Payment Gateway Name selected, and Cancel Page redirect page.

On the first **Mission** page, the user can select the Mission Trip. Only active/available mission trips display.



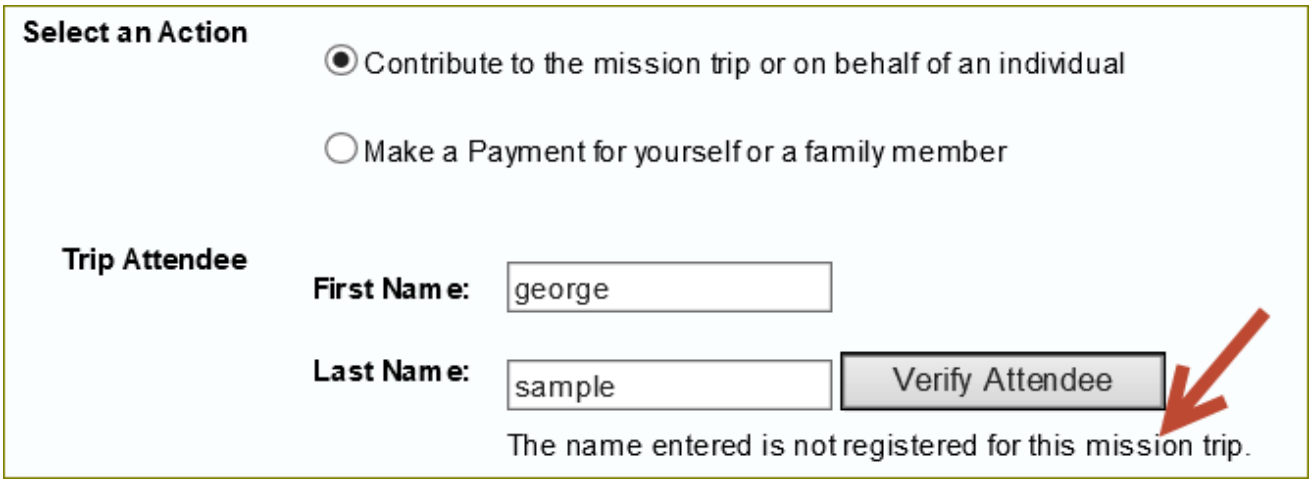
After selecting an active trip, the user can either make a payment towards their own trip or enter a first and last name to make a payment towards another traveler. Because the user has signed in,

Arena knows what trip and person to display.



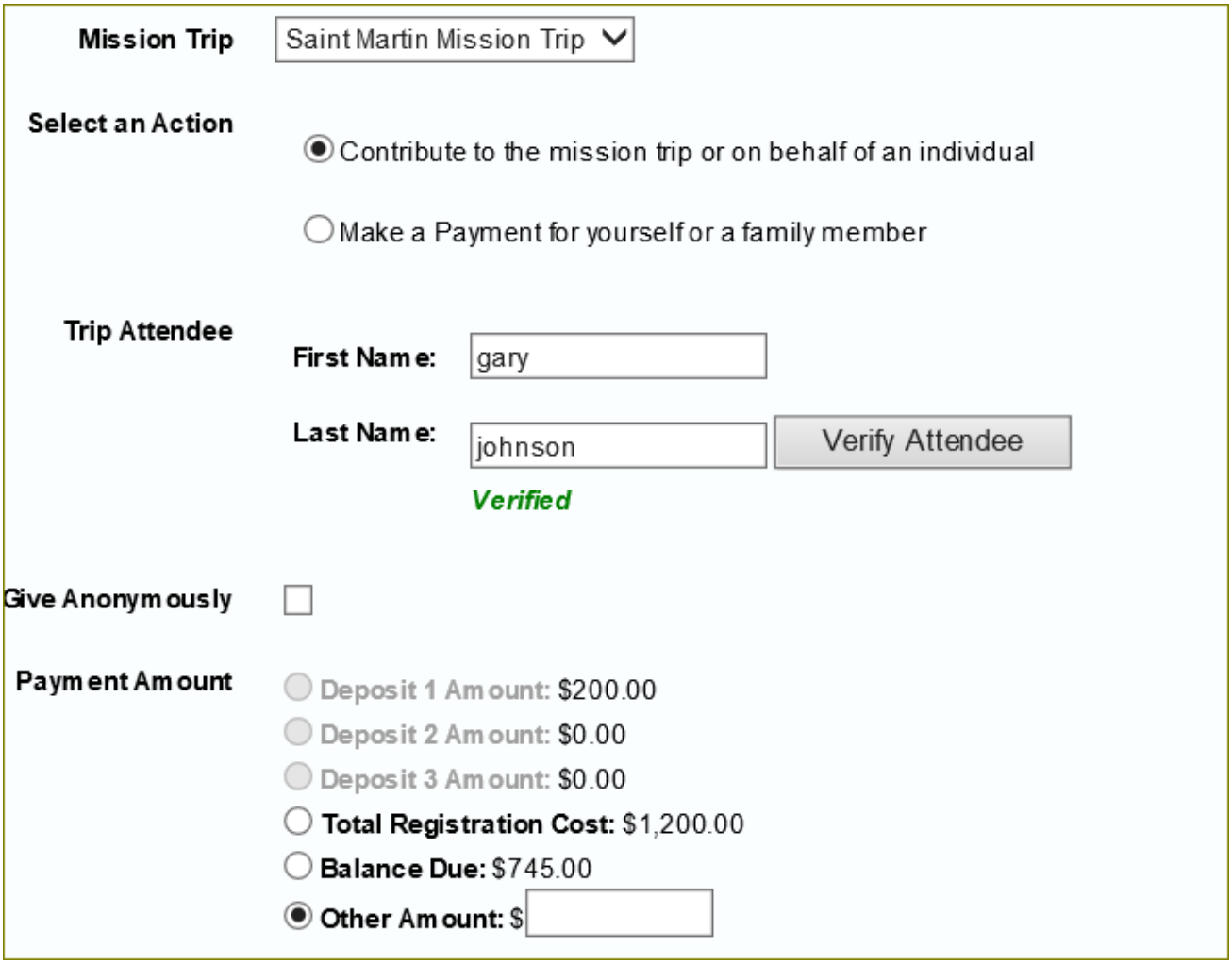
If the user elects to make a payment towards a traveler, Arena first needs to verify the person is an "approved" traveler.

If the name entered is not registered or approved, Arena displays a message stating so.

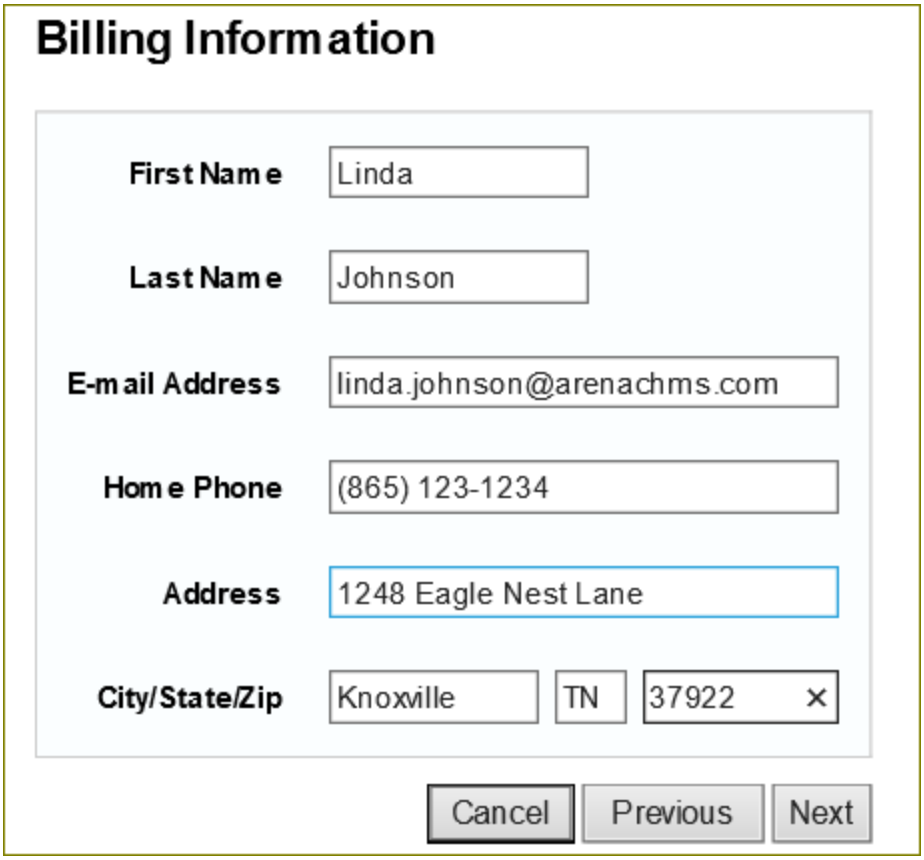


Once the traveler is verified, Arena displays the applicable trip cost information. The contributor can

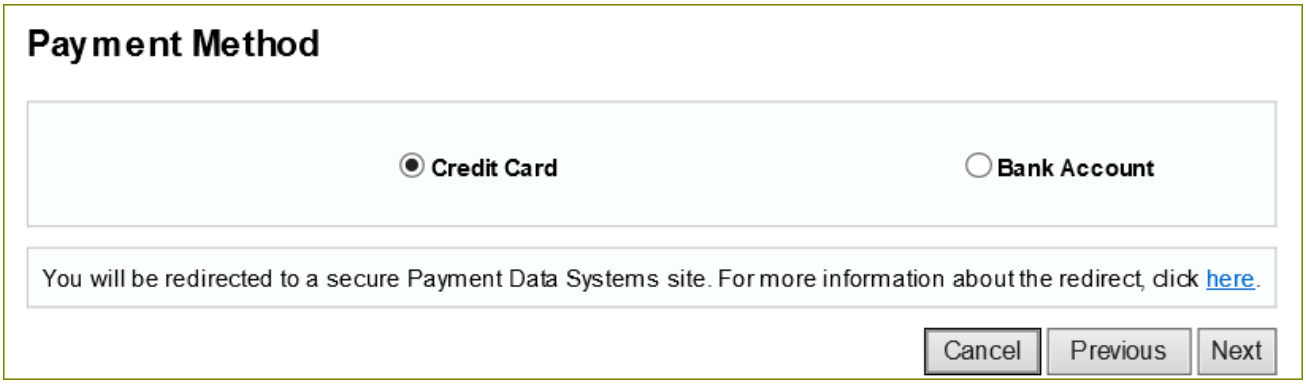
either pay the balance or enter another amount. Contributors can also select **Give Anonymously** to not display their name on the My Membership/Mission module.



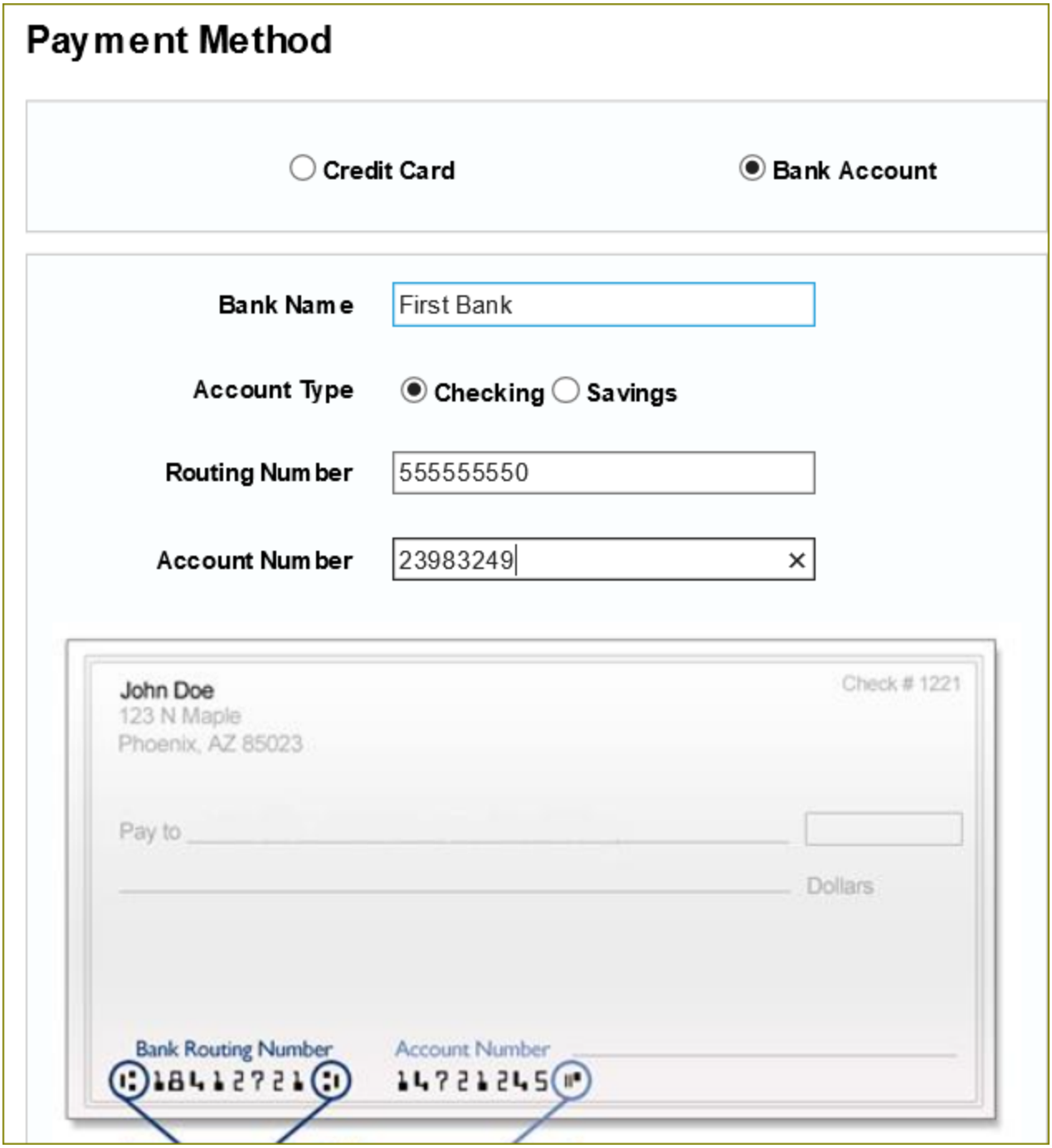
The contributor confirms/enters the contact information. Arena updates the existing record. They click the **Next** button to continue.



The contributor selects the payment method then clicks the **Next** button.



Enter applicable payment information then click the **Next** button.



After confirming all information, the contributor clicks the **Finish** button.

Payment Verification

Mission Trip	**Saint Martin Mission Trip**
Action	**Contribute to the mission trip or on behalf of an individual**
Attendee	**gary johnson**
Payment Amount	**20.**
Billing Name	**Linda Johnson**
Billing Email	**linda.johnson@arenachms.com**
Billing Phone	**(865) 123-1234**
Billing Address	**1248 Eagle Nest Lane**
Billing City/State/Zip	**Knoxville, TN 37922**
Payment Method	**Bank Account**
Bank Name	**First Bank**
Account Type	**Checking**
Account Number	**23983249**
Routing Number	**555555550**

Cancel | Previous | Finish

A confirmation displays and the contribution is applied to the traveler.

Confirmation

Confirmation Number: 150121080927308

If configured, an email is sent to the contributor.

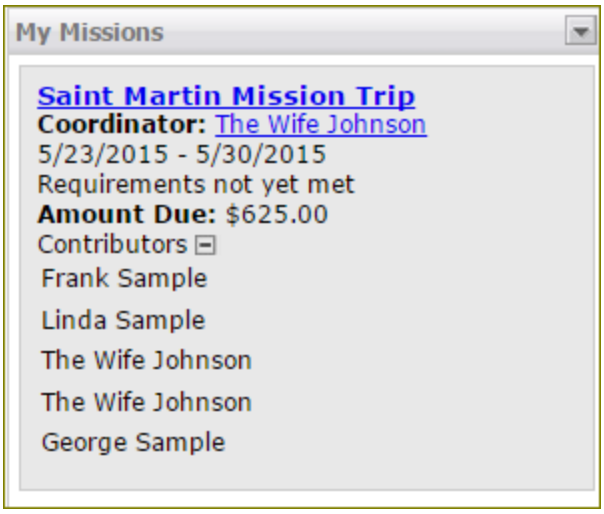
Thank you for your Passage Community Church Mission Trip contribution.

Mission Trip: Saint Martin Mission Trip
Registration Action: Contribution
Attendee: Hubby Johnson

Payment Details
Name: Linda Johnson
Payment Method: Bank Account
Account Number: XXXX3249
Amount: $20.00
Date: 1/21/2015

Your confirmation number is **150121080927308**.

If configured, the traveler can also view contributions on the **My Membership** page on the external (member) portal.



Online Prayer Requests

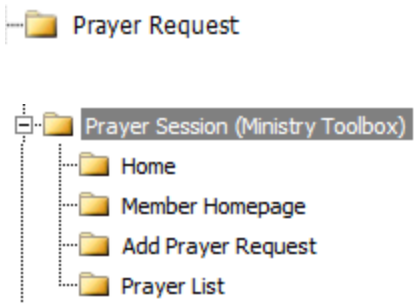
Arena's Prayer feature is a powerful way to assist your members in their personal prayer life and for your prayer team to access prayers remotely. An Arena-managed on-line Prayer Request ministry system consists of three primary parts as well as a few optional components. This feature requires six pages.

In addition to customizing the associated pages and module, use the below checklist to configure this feature:

Customize the Prayer Request | Comments, Prayer Request | Expire No Renewal, and Prayer Request | with Renewal System Emails.

Customize the Prayer Category, Prayer Source Lookups.

Customize the Prayer Request Days Active and Prayer Request Renewals Organization Settings.

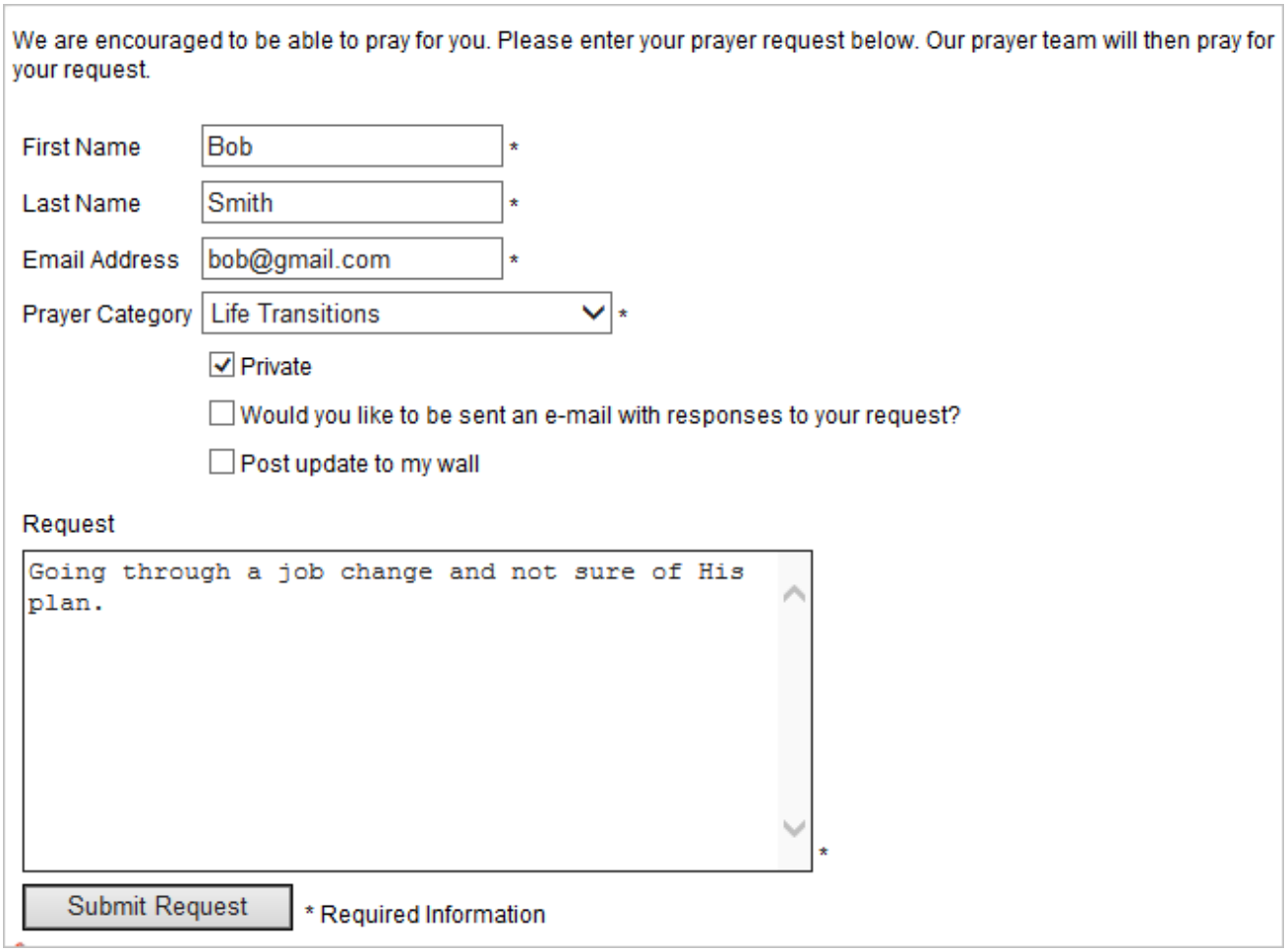


- **Prayer Request** page – This page is a simple form for members and visitors to submit prayer requests. We recommend adding this page in a non-secured area (for the use of visitors as well as members). This page requires the Prayer Request module, setting a default Content Category (typically "Arena"), a default Source, (typically "Web site"), an optional default Prayer Category, (typically "General"), and an email address or addresses of who to notify when a prayer is entered or modified.
- **Prayer Session** page – This page allows your prayer ministry team to select one or more categories of prayer requests and then view each active and approved request within the selected categories, with the option to add a comment. This page requires the Prayer Session module, where you can select which prayer categories to display, whether to display private prayers and counts.
- **Prayer Lists** page – This page is a list of active prayers. It can be set to include only active, approved requests or any status. These lists can help your members to remember particular prayer needs by showing current requests, or they can act as a testimony by showing answered prayers. Your Prayer Lists may include sensitive or private information so it is advisable to place it inside a secured area of your website such as a centralized Members section. This page requires the Prayer List module, setting the Content Category, Source, and Status.
- **Prayer Calendar** – This is an optional page to allow your prayer ministry to schedule a specific prayer-related event in a separate area of your website from your organization's other ministry events. This is essentially identical to a normal Event Calendar, but it specifically displays events or promotions from the Prayer Topic Area. This page requires the Event Calendar module, with the **Detail** page set to the **Event Details** page associated with your primary Event Calendar, and the Topic Areas set to the Prayer Topic Area ID (789 by

default) and any other Topic Area IDs you wish to display on this calendar.

Once customization is complete, prayer requests can be entered from the staff portal or members can enter prayers from the Arena-managed external portal.

Prayer Entry from Arena-managed website

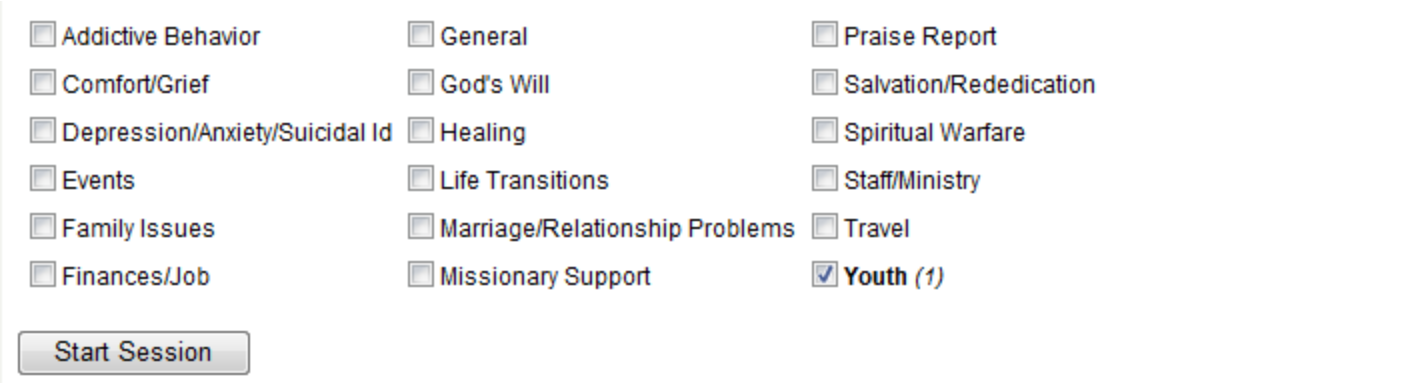


Prayer Ministry Toolbox

This feature allows your prayer warriors to access prayer requests from the Arena-managed external portal, behind the **Member** page. This feature uses a single page and requires the Prayer Session module, if all prayer categories are listed on one session. Customize the Prayer Session module to restrict prayer categories and private prayer requests per prayer warrior.

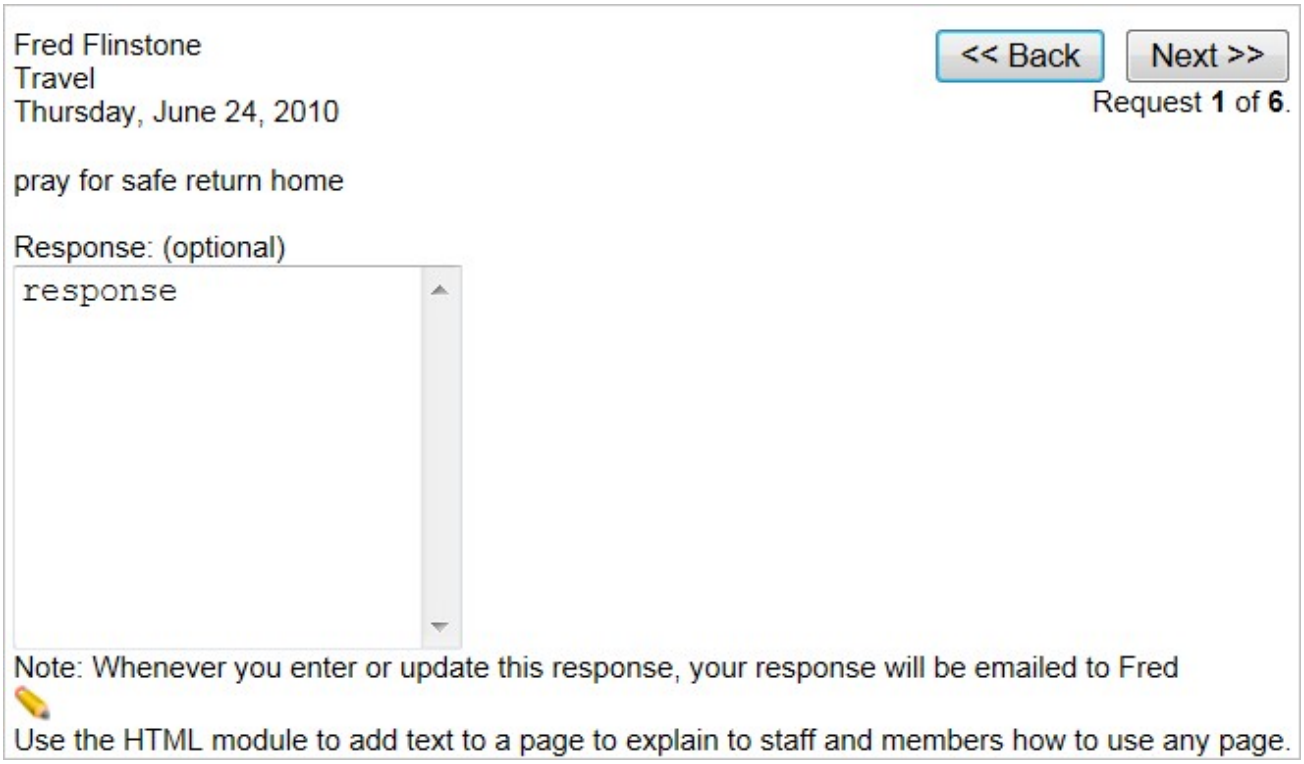
Once configured, prayer warriors are able to select prayer request categories.

Prayer Ministry Toolbox



Each prayer request displays on a single page and displays from oldest to newest. By viewing each prayer request, Arena logs the user and date.

External Prayer Page



Online Newsletters

Your organization can use Online Newsletters to communicate with your membership and your staff in many different ways. Use this feature to cover a broad range of topics in one newsletter or a newsletter for each department. Depending on the specific purpose of the Newsletter, you can deploy it behind a secured login page, such as the Members section. Alternatively, you can make your newsletter public and allow public subscriptions by non-members. In either case, the implementation follows the same process.

In addition to customizing the associated pages and modules, use the checklist below to configure this feature:

Customize the Newsletter Title Organization Setting.

Customize the Newsletter Article Type, Newsletter Author Sources and Newsletter Copyright Source Lookups.

Start the Newsletter and Newsletter Subscription | Email Verification System Emails.

Start the Newsletter Send Agent. This agent sends the specified newsletter to newsletter subscribers. You need to add the Newsletter ID to the Worker Settings. Before it sends the email, the agent performs some URL cleanup and replaces the <!-- ##unsubscribe## --> markup with a personalized unsubscribe link for each subscriber. Because of this you must ensure that your publish point includes the ##unsubscribe## markup.

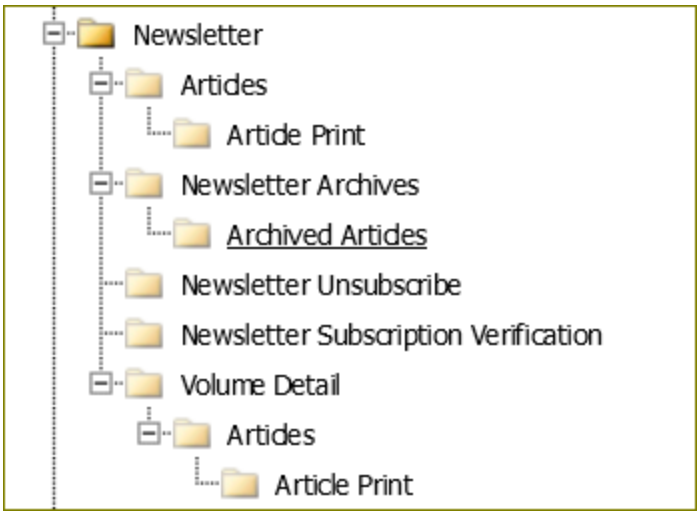
Customize the publish point page. This publish point page generally differs from the Main Newsletter page in several ways. Because it is not intended to be viewed by a person browsing your website, it does not contain site navigation and should be based on a simplified page template.

If using the email verification option add a Newsletter child page, making it not visible in the navigation, set the Newsletter Subscription Verification module setting; reference this new page ID in the Newsletter Subscribe module; and customize the Newsletter Subscription | Email Verification system email.

Each newsletter needs dedicated pages on the external website to function correctly. This is the outward- facing side of your newsletter, where users view each volume and article of your newsletter, as well as manage their subscription to the newsletter and search the newsletter's archives. Each of your e-newsletters need a separate set of these pages with the required modules and module settings. You initial installation includes one set of pages, described on the next page. Arena installations includes one set of default pages.

Newsletter Pages

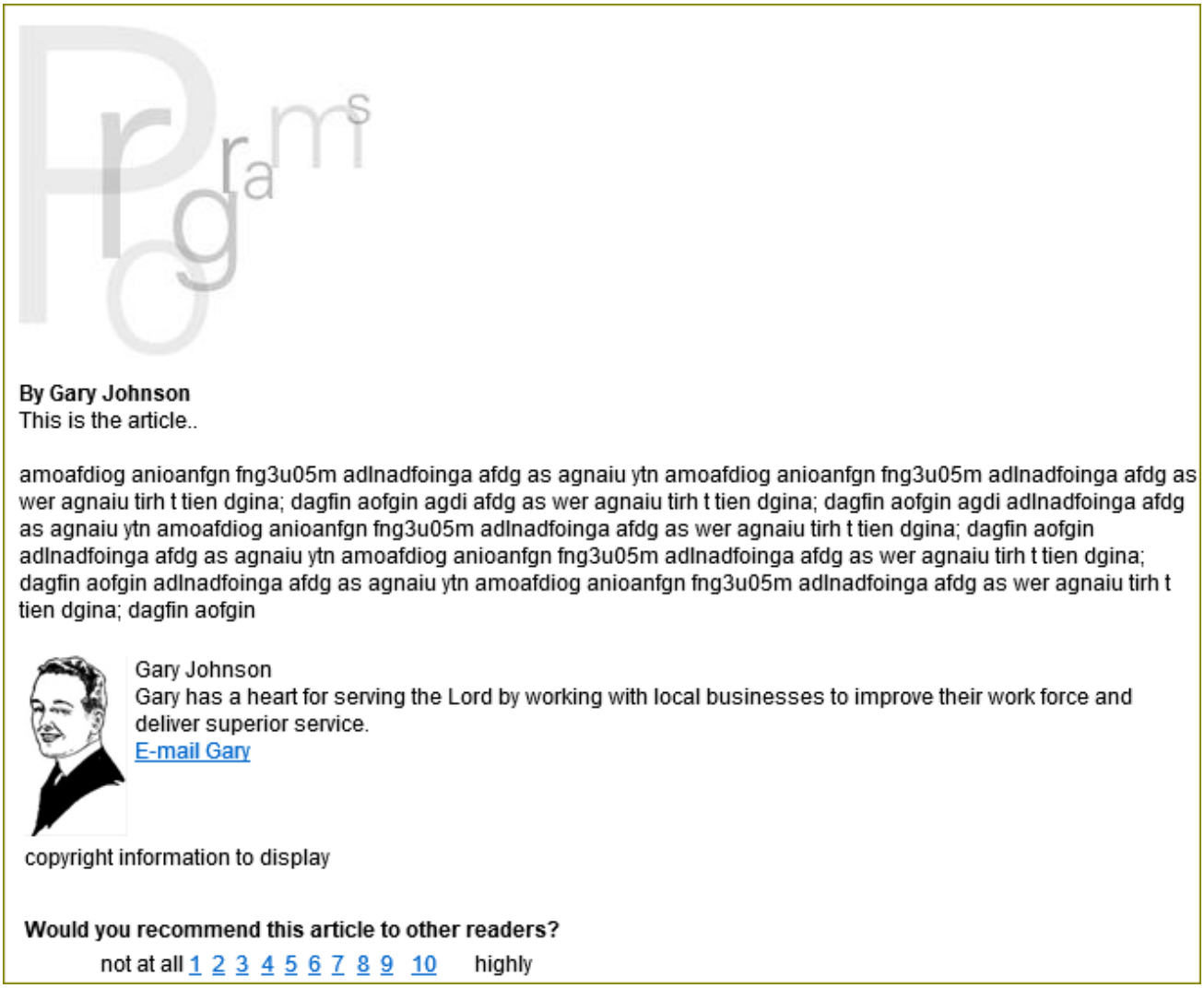
At installation, Arena includes a set of pages for one newsletter. Review and customize the modules on each page. The following are basic examples of each module.



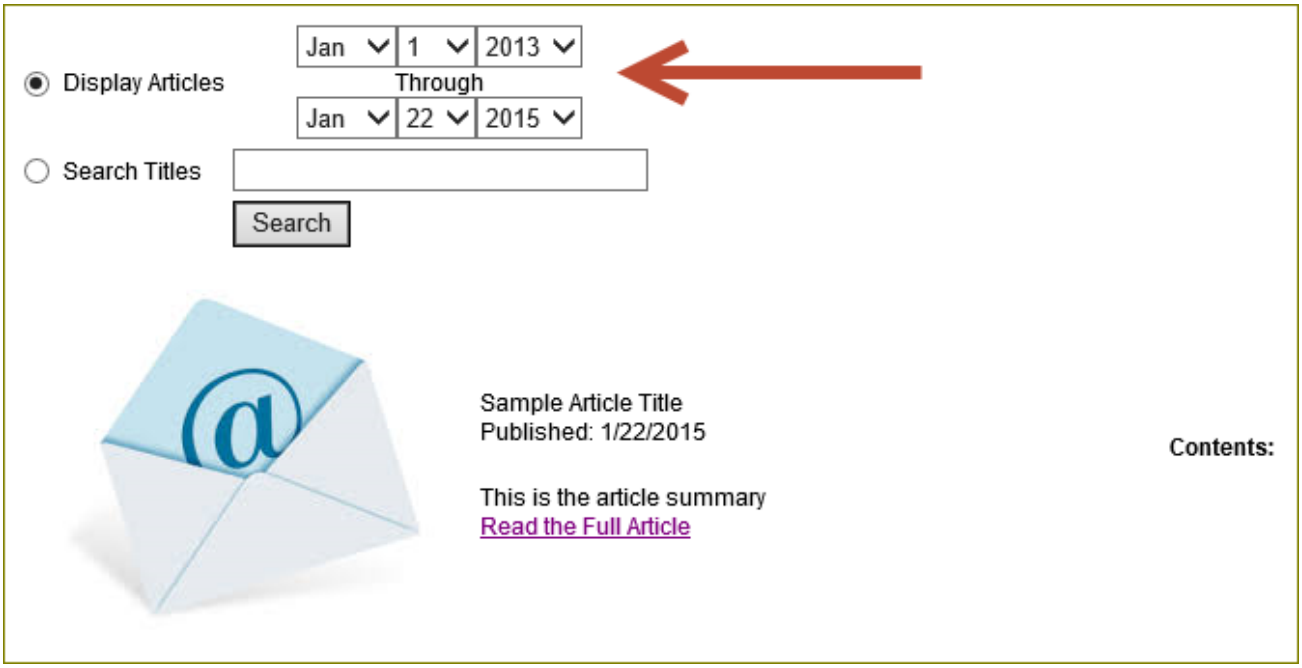
Newsletter page – This is the primary page for visitors and subscribers, which displays a title summary of Newsletter articles to which the user can select. This page is visible in the navigation and requires the Newsletter Promotion Display and Newsletter Subscribe modules.

Articles page – This page displays an individual article as well as the archive search tool to allow the visitor to browse previous newsletter volumes and articles. This page should be set to not display in navigation and requires the Newsletter Article and Newsletter Archive modules, with the Archives and Articles pages selected for their respective settings, and a Newsletter ID setting matching the desired ID number. Consider customizing the Tools File module setting to display the tool bar layout.

Article Print page – This page displays the article selected with no additional menus or fields to allow for a 'clean' printing of the article. The page requires the Newsletter Article Display module. You need to remove any navigation bars or any other inherited modules from this page.



Newsletter Archives page – This page gives users the ability to view the results of an Archive search with links to the resulting articles. The page requires the Newsletter Archive module with empty **Archive Results** page setting (as this is the results page) and the **Articles** page selected, and a Newsletter ID setting matching the desired ID number.



If you plan to distribute your newsletter by email, you also need to create the three pages below for each newsletter you wish to publish.

Newsletter Subscribe page – This page and module gives visitors the ability to subscribe to your newsletter. This page requires the Newsletter Subscribe module with the desired Newsletter ID setting and set to Display In Nav. It could be located on the same level as the root Newsletter.

Newsletter Unsubscribe page – This page and module gives subscribers the ability to unsubscribe. This page requires the Newsletter Unsubscribe module and has no module settings. This module is to allow users to subscriber to or remove their subscription by clicking the ***Unsubscribe*** link in the email they receive.

Newsletter Subscription Verification page - This page is not required unless you are publishing your Newsletter by subscription. It is rather unique in that the configuration is nearly identical to the Newsletter Page. The page requires its own template specifically designed to display in emails (thus a simplified HTML code). When you create your Newsletter internally, you need to enter the external URL for this page as the Publish Point for the newsletter. This is the actual page that the

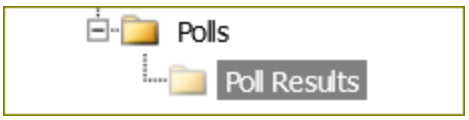
subscriber receives in their email. You also need to setup the **Newsletter Subscription|Email Verification System Email**.

Online Polls

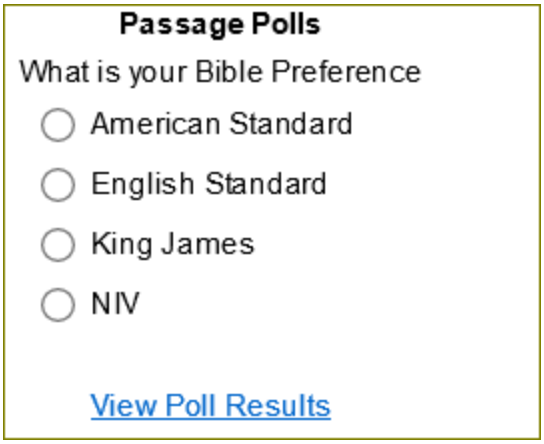
Polls allow your membership to communicate back to you on a broad range of topics. This is unlike most of the modules you might use on your website which function to transmit information from your organization to your membership. A poll can be on a broad subject such as a favorite season or it can be more narrow such as to ask an opinion of a guest speaker or anything in between. A minister could use a poll to ask the member's preference on where to travel to for a fall retreat or he could ask how many people would make use of or volunteer for a new ministry opportunity. The possibilities are nearly endless. Once you create a poll, you can display it on your organization's Arena-managed website and Arena assigns each poll a Poll ID. You can place a poll on nearly any page of your internal Arena or Arena-managed website, with the proper Poll Category ID and **Poll Results** page settings. This feature requires two pages.

In addition to customizing the required two pages and associated modules, use the below checklist to configure this feature:

Customize the **Content Category Lookup**. This Lookup is used with other features.

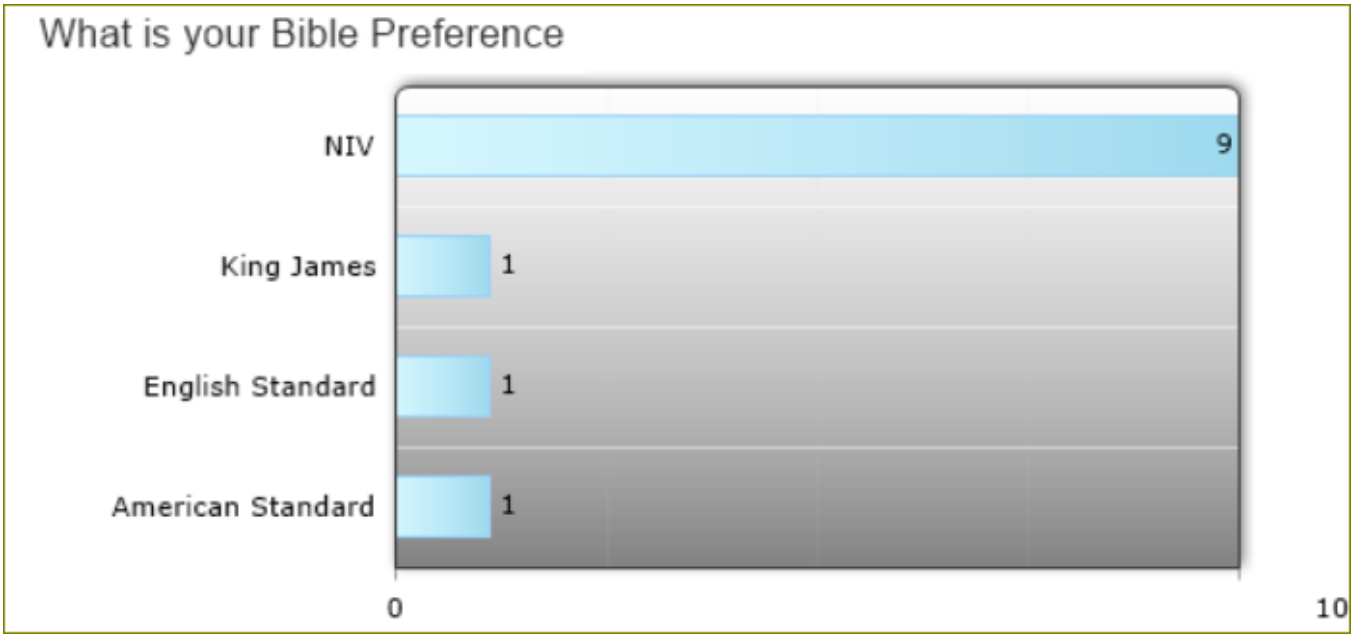


Polls page – This page allows users to participate in the poll. This page requires the Poll Display Active in Category module, with the required settings.



Poll Results page – This page displays the results of the current poll, once the visitor participates.

This page requires the Poll Graph Results module. This page should not be visible from basic navigation, as an ID must pass from the poll itself, and should be a child of your Home page. When using polls in your email subscription newsletters, you need to use the Poll Display Newsletter module with the same settings listed above because emails limit the HTML code allowed.



Online Classified Ads

When your members are looking to help fill a specific need of other members or they have a special need of their own, an online Classified Ad system is an excellent way for you to help them meet that need. Needs such as a new or used vehicle, an available service such as babysitting or a Christian CPA or job openings and résumés can all be posted on a Classified Ad system and then made available to others, once the ads are approved.

You can separate the Classified Ads system into multiple content categories to better differentiate different types of listings. By default, Arena comes with two content categories- Classifieds and Business Directory. Use the Classified Type lookup to customize the values. You can add additional content categories and listing categories in these tables, but the method for adding them to your website remains the same. To implement each classified category, three pages are required.

In addition to customizing the required three pages and modules, use the below checklist to configure this feature:

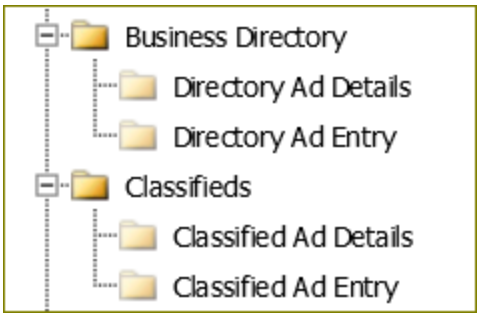
Customize the Classified Category and Classified Type Lookups.

Customize the **Classified Approval** page, Classified Expire Days, Business Directory Email, Business and Directory Expire Days Organization Settings.

Start the Classified Cleanup Agent.

Customize the Classified Approval System Email.

Create Security for staff members who can view, edit, and/or approve the ads.



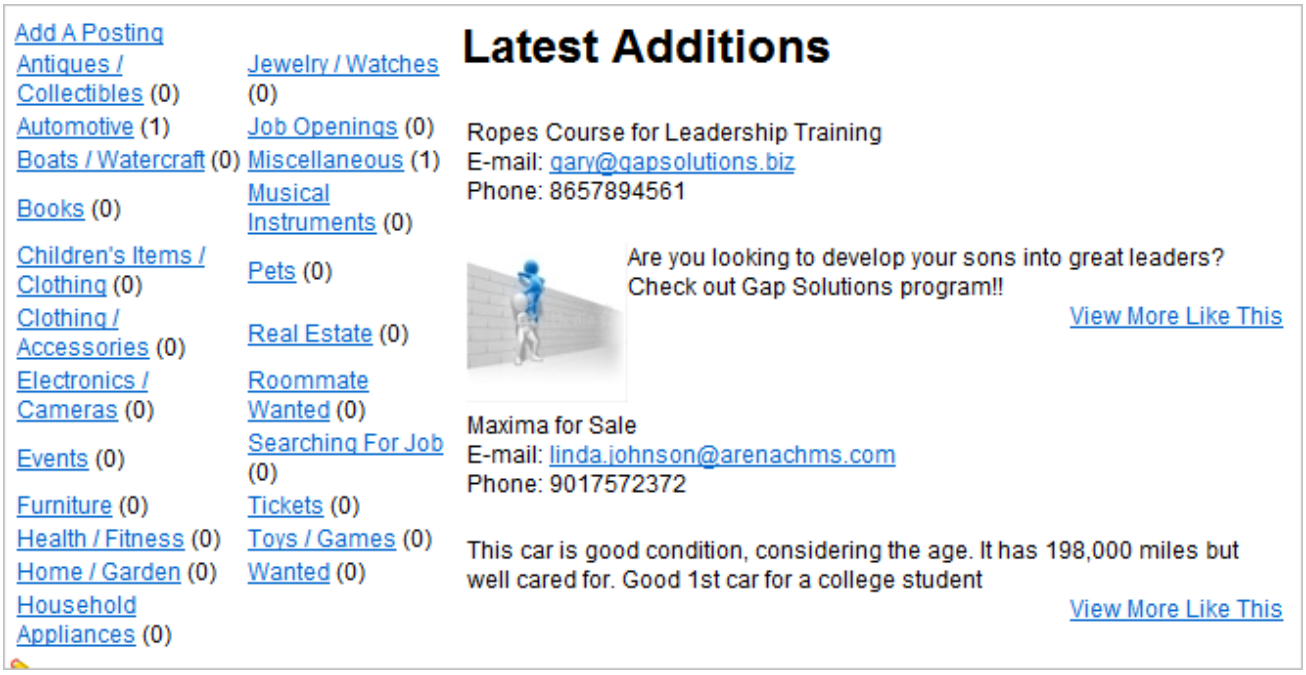
Business/Classifieds page – This page is the initial page your members see when they navigate to this area. This page displays a listing of categories with a sum of the number of items in each, a link to add a new posting, and a special list of recent additions. We suggest you place this page behind a secure login and it needs to be visible in navigation. The page requires the Classifieds Categories module with Add/Edit Page set to Classified Ad Entry, Category Detail Page set to Classified Ad Details, Classified Type set to Classified for classified ads, or set to Business Ads for business classifieds, and other setting.

Business/Classified Ad Details page – This page displays the details of all classified ads in a category. This page should be a child page of the **Classified Ads** page and set to not display in navigation. This page requires the Classified Category Details module, with Content Category set (Arena is the default), the Edit Page set to Classified Ad Entry, and other settings.

Business/Classified Ad Entry page – This page displays users existing classified ads and a button to add a new item. Once the person clicks the **Add Item** button, they can then fill out the form that displays to add the item to their classified ads listing. This page should be a child page of the **Classified Ads** page and set to not display in navigation. This page requires the Classified Entry module, with Classified Type set to Classified for Classified Ads or to Business Ads for business directory, Content Category (Arena is the default), and other settings.

Once configured, members can then submit new entries and view approved submissions.

Classifieds



Classified Entry

Title: Indoor Basketball Game (please do not type in all caps)

Text: This fund indoor basketball game can be enjoyed by all family members!

(please do not type in all caps)

Expire Date: 4/21/2015 (max date 4/21/2015)

Category: Toys / Games

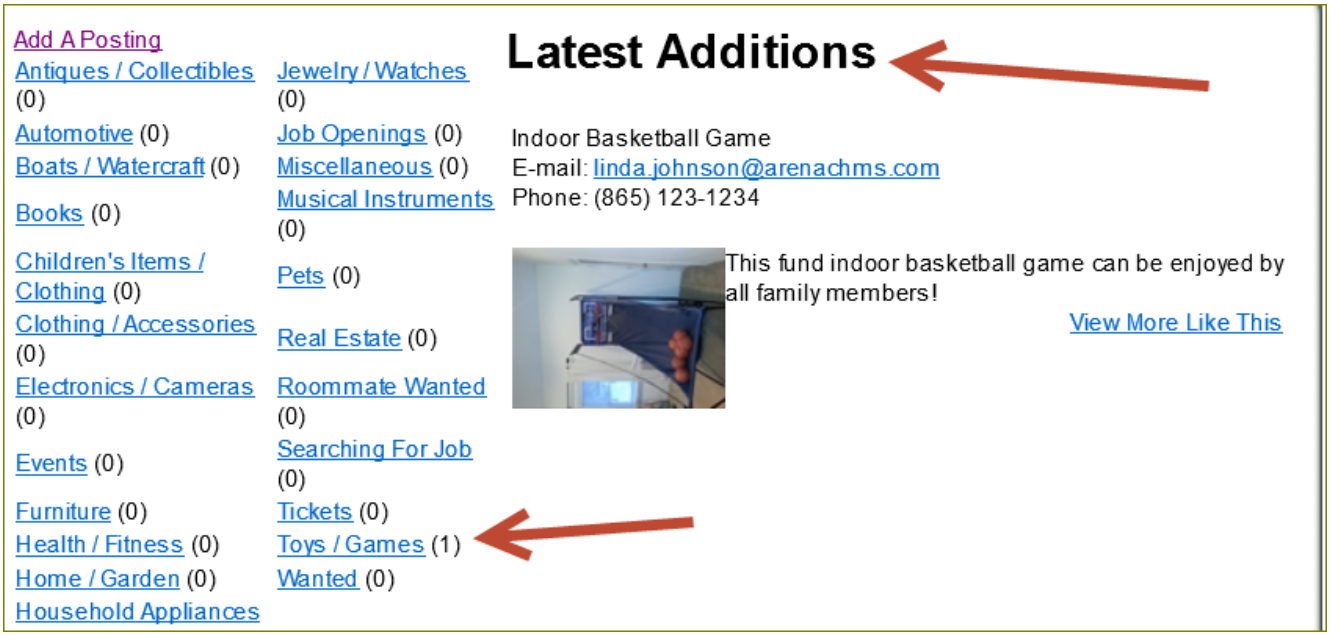
Phone: (865) 123-1234

E-mail: linda.johnson@arenachms.com

Photo: C:\Users\lindaj\OneDrive\Items to Sell\201 Browse... (optional)

Submit Cancel

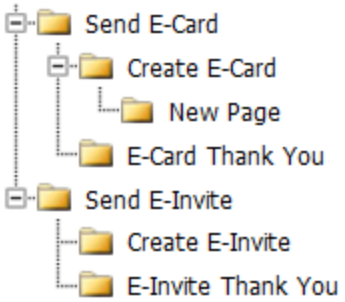
Once the Ads are approved, they are available on the **Classifieds** page.



Online E-cards and E-invites

By using online E-cards and E-invites your website visitors can provide a friendly and personal link to your organization and other members or visitors. This can greatly increase the ministry range of your organization by providing a contact point for members and visitors all around the world.

The process for creating and sending an e-card or e-invite is very similar to the process for a physical card or invitation. First, you must create the card or invite. Then, users can distribute the selected card or invite to friends and family. The recipient opens the card and receives the message. Steps to create e-cards and e-invites are the same, just substitute the relevant name as needed.



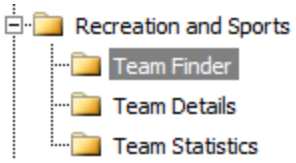
- **E-Cards** – This page is where a user can browse through a listing of the e-cards you have created and made available and select one to send to a friend or relative. While it is not required that this page be located behind a secure login, due to the fact that sending these

e-cards uses internal email settings, you are advised to place this page in a secure section of your website. It should also be visible in navigation. This page requires the E-Card Category List module with your **Create E-Card** page selected as the Card Entry Page setting, and you need to enter the Card Type ID found in the Card Type lookup table for the type you wish to use (e-card or e-invite).

- **Create E-Card** – Once a user selects an e-card to send, the **Create E-Card** page allows the user to specify the sender, the recipient, their email addresses, and a brief personal message, to display along with the e-card's own message. This page should be a child page of your **E-Cards** page, and it should not display in navigation. This page requires the E-Card Message Entry module with your **E-Card Thank You** page as the **Redirect** page.
- **E-Card/E-Invite Thank You** – This page is for thanking users for using an e-card or e-invite. This page should be a child page of your **E-Cards** page and should not display in navigation. This page requires the Advance HTML Text module and has no required settings. Note that you can use the same **Thank You** page for both e-cards and e-invites if you wish to.
- **E-Card/E-Invite View** – This page is where the e-card or e-invite displays. This page should be a child of your **Home** page (where it should not require a login) and should not display in navigation. You can create a custom template for this page either to remove all other elements and just show the e-card or e- invite or to adjust your normal navigation and content areas to fit around the e-card or e-invite properly. This page requires the E-Card Display module and has no required settings.

Online Sports Monitor

An Arena-managed website can include a Sports Monitor that allows visitors to view the game schedule, season statistics, and team rosters of your organization's sports ministries. For each separate sport category or "root cluster" you need a distinct Team List module and Team Stats module set to the proper root cluster value, which can be on the same page as your existing Team List and Team Stats modules, or on separate pages. You can use the same **Team Details** page and modules for any number of sport categories. This feature requires three pages.

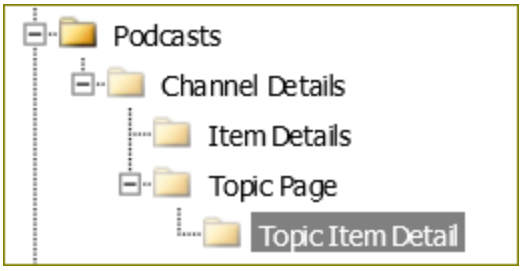


- **Team Finder** page – This page enables visitors to navigate through the various divisions and teams within the specified League. This page requires the Team List module with the **Team Detail** page selected and a Root Cluster ID setting of the Group_Cluster_ID value of the league-level group for this sport category.
- **Team Details** page – This page displays the details of a team including practice day, roster, announcements, description, and game schedule. This page requires the Team Details module with a Season selected from the Sports Seasons Lookup.
- **Team Statistics** page – This page displays the team names, win/loss/tie records, win percentage, the number of completed games and remaining games for each team. This page requires the Team Stats module with a specific Season (from the same lookup as used on the **Team Details** page above), Starting Cluster ID (again, the same Group_Cluster_ID as on both of the previous pages), and **Team Detail** page selected.

Podcasts

An external page structure is necessary to allow web users to access your podcasts, and subscribe to them directly from your website. Below is an example of a basic podcasting setup. In this example, a "Podcasts" page is directly under the website homepage. Permissions allow all users to have access to the podcasts. Users can view the video podcasts on the external site. A page would have to be setup with the Feed/Item Viewer module (see **Podcast Items** page under External Pages setup).

Setting up these internal pages allow users to create podcast channels, add topics and actual audio/video files to host. This is sufficient setup to allow users with RSS feed catchers, such as iTunes©, to manually subscribe using the specific URL of the feed channel. This is covered in the "Creating Podcasts" section of this help file. A set of external pages must be setup to allow web users to automatically subscribe to the feeds from your website. A walk through of a basic sample website page setup is covered next.



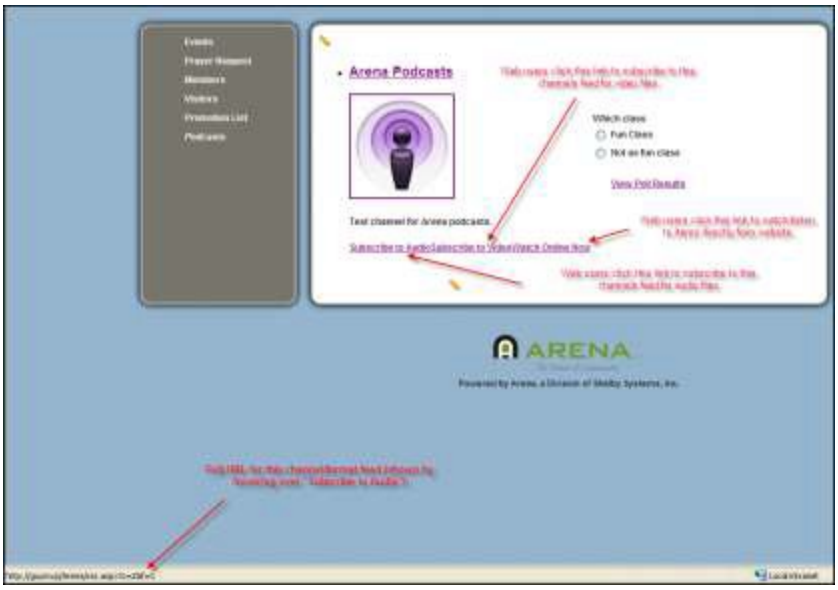
- **Podcasts** – This page displays available podcasts and requires the Feed/Channel View

module with Image Size set to desired height and width size to display the image (default is 120), the **Item View** page set to Topic page and the Topic View Page set. The Flash Format setting of the module would need to be set to the feed format that carries the MIME type of the desired video file types.

- **Channel Details** – This page displays details for the channel.
- **Item Details**
- **Topic Page** – This page requires the Feed/Topic View module, with Image Size set, height/width size of display image (default is 120), **Item Detail** page set to page that shows details of an item selected from current page (for this example, set to "Podcast Items" page). When a user selects an item, the podcast attempts to play on the next page if the file format matches the feed format selected in the module setting mentioned above.
- **Topic Item Detail** – This page requires the Feed/Item Flash Viewer module, with Flash Format.

Viewing Podcasts: Directly on external website

Podcasts are viewed in two general ways, either on your church's website or through a third party pod catcher (such as iTunes, Zune, some web browsers, etc.). If an external website page structure is built to allow viewing of the items (see External Pages Setup in the Administrative Setup section), web users can either view your audio/video files on your website, or subscribe to an RSS feed directly from your site if they are using a browser that supports RSS feeds.

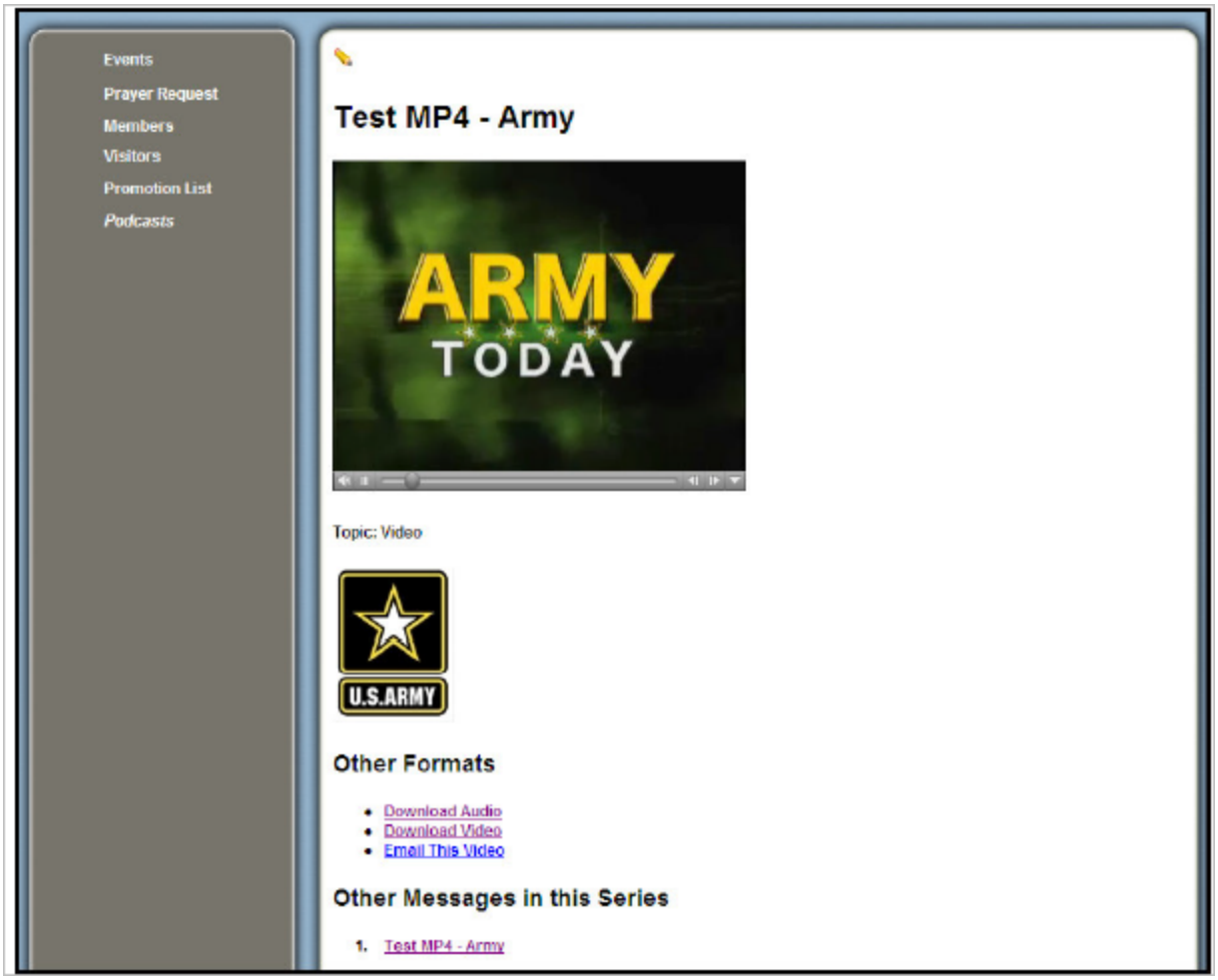


Opening Videos

Video podcasts can be viewed from the website directly when setup to do so. A page would have to be setup with the Feed/Item Viewer module (see Podcast Items page under External Pages setup). The Flash Format setting of the module would need to be set to the feed format that carries the MIME type of the desired video file types. Once this page is setup properly, the **Podcast Channel** page (see screenshot above) displays a link titled "Watch Online Now". Clicking this link takes the user to the **Topic** page (if following the structure illustrated in External Pages setup section). The topic page lists each Topic separately with all of its items displayed beneath it.

From **Topic** page (as setup in External Pages Setup area of Administrative Setup):

When an item is clicked, it attempts to play on the next page if the file format matches the feed format selected in the module settings.



When the web user clicks one of the Subscribe links (as seen in the screen shot above), Arena attempts to open the RSS feed (referenced by the full URL at the bottom left of the screenshot). If the browser they are using supports RSS feeds, it displays the available podcast items and allows the user to subscribe to your feed from that page.

Subscribing to Podcasts

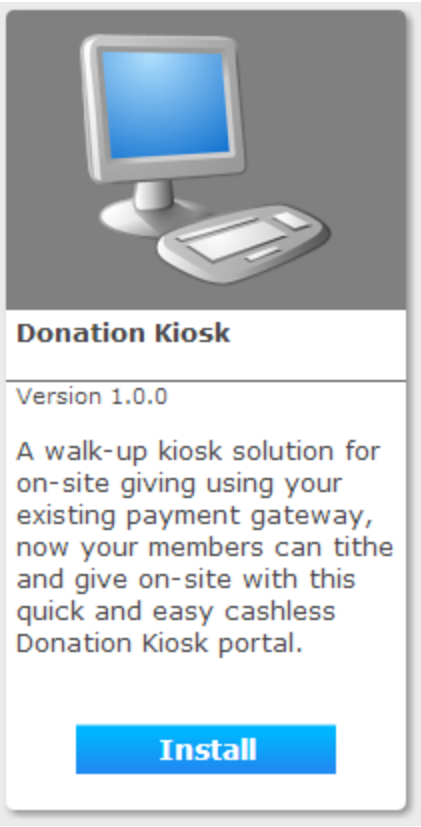
Web users can subscribe to the RSS feeds by clicking one of the Subscribe links. The web user can subscribe using their preferred "pod catcher" software. If the web browser they are using is RSS enabled, it allows them to subscribe and download the items through its RSS interface.

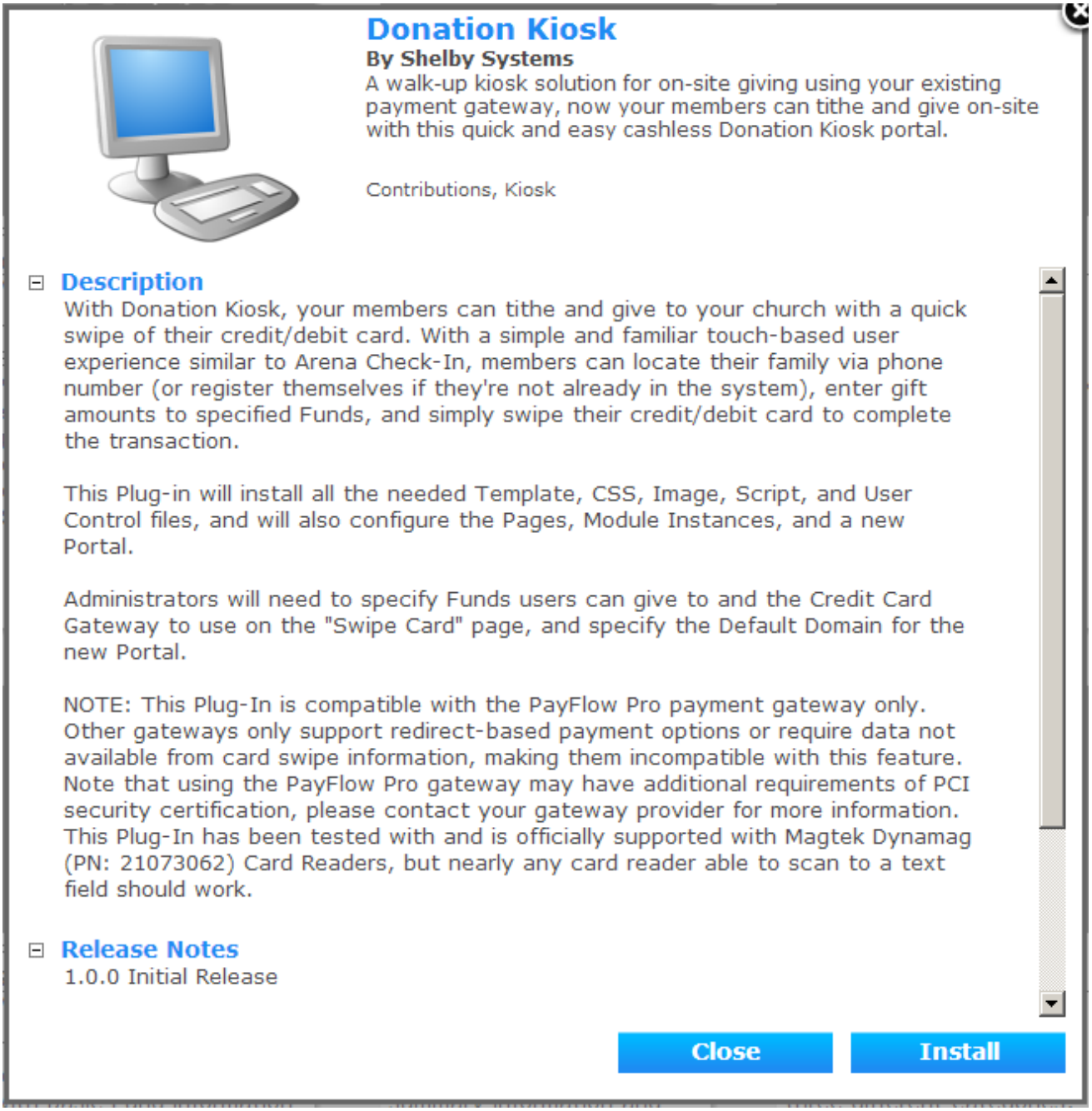
Giving Kiosk Portal

The Giving Kiosk solution gives members the ability to give on-site using your organization's existing payment gateway provider, and a browser enabled device using a USB card swipe device.

Setup the Giving Kiosk

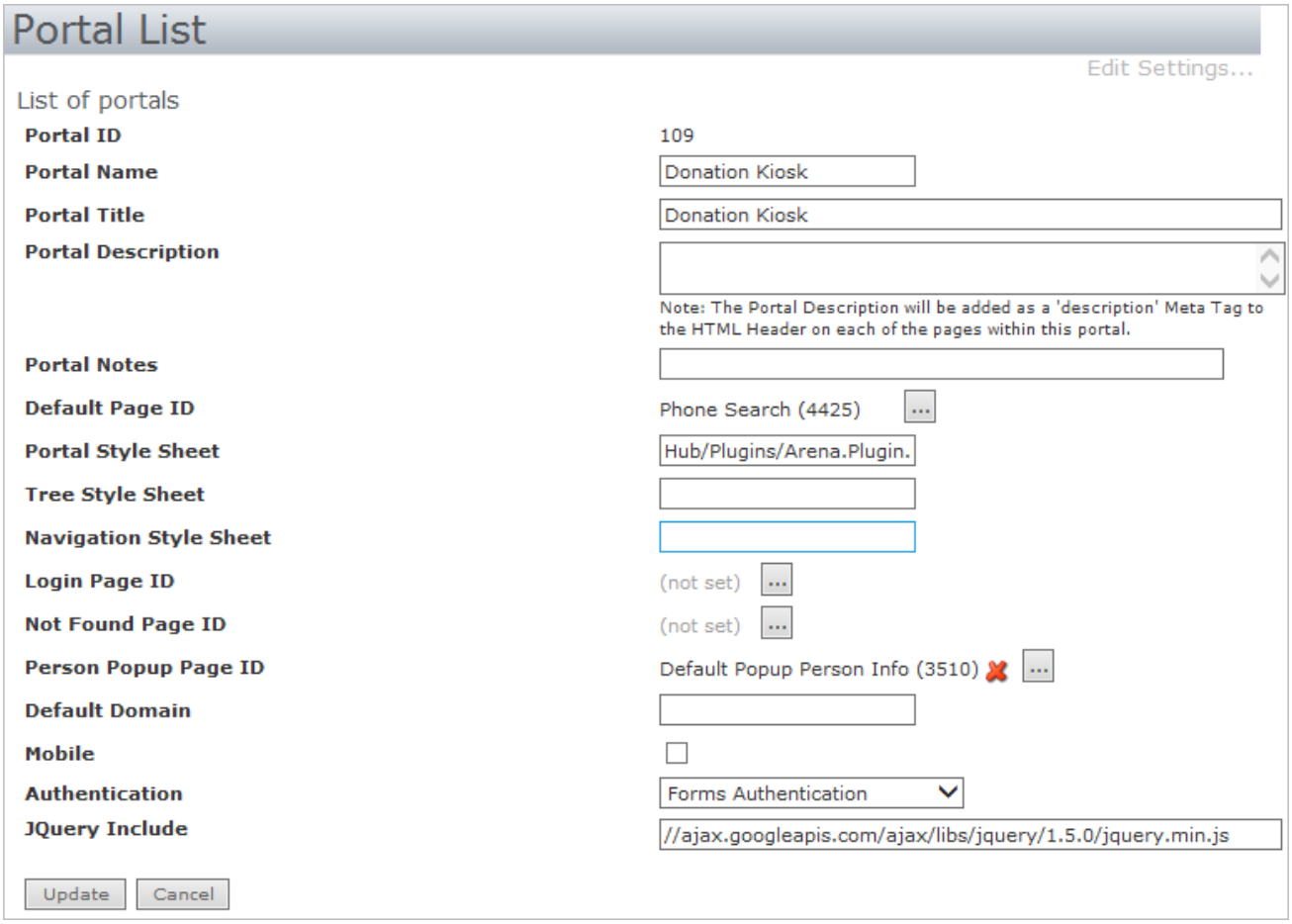
Install the Donation Kiosk plug-in from the Arena Hub.



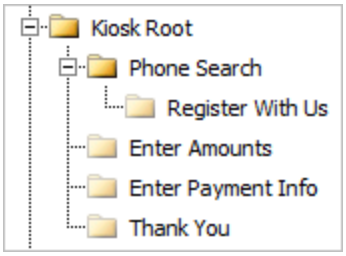


Register the domain or subdomain for this portal.

Customize Portal settings. You can optionally customize the CSS which is located in the Arena\Hub\Plugins\Arena.Plugin.DonationKiosk\CSS folder. If electing to customize the CSS, be aware the file may be overwritten with an Arena update.



Review all pages and customize as required and desired.

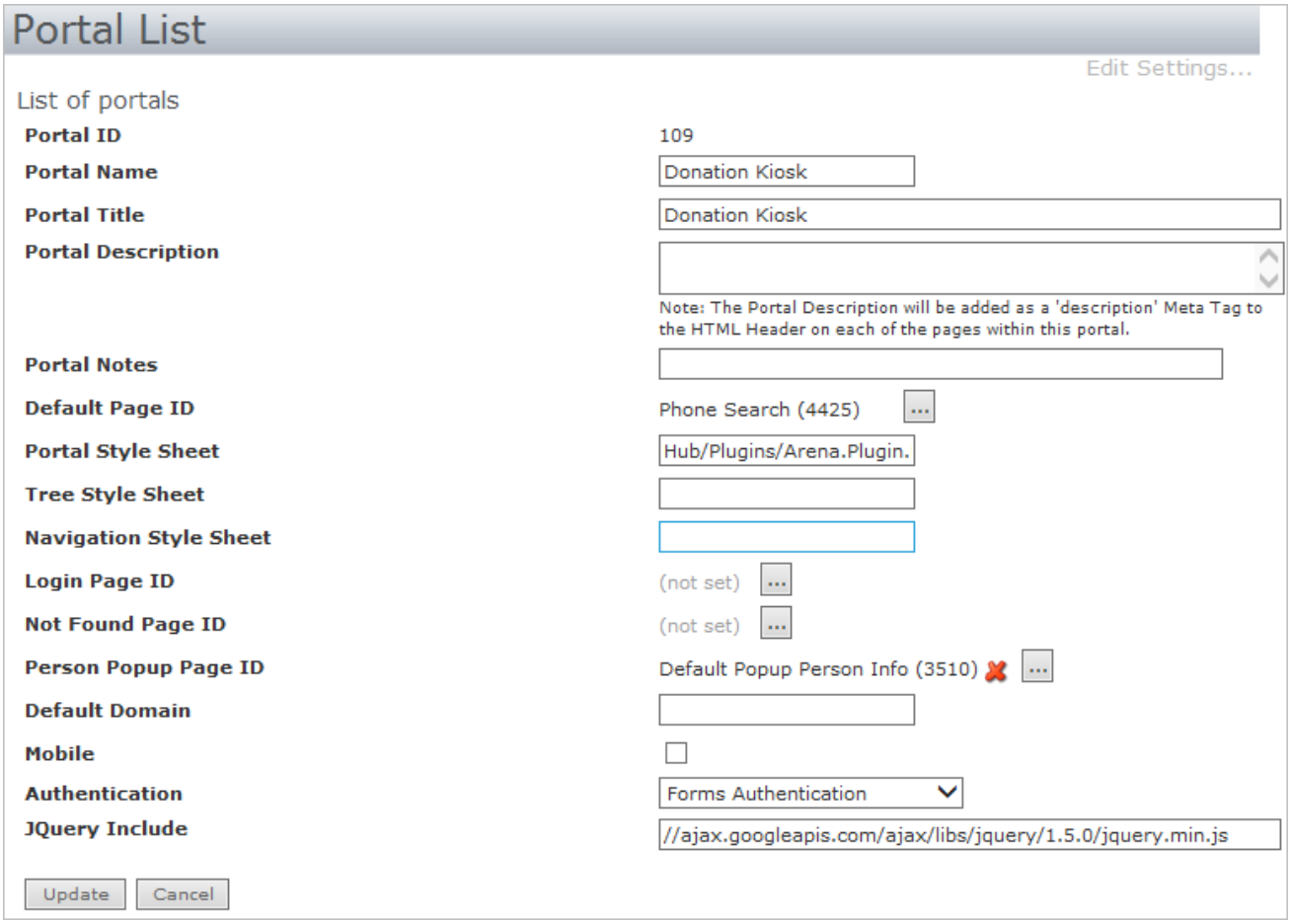


- **Kiosk Root** page has no required modules
- **Phone Search** page – This page is used to search for existing records by phone number and use the Kiosk Phone Search and Idle Timeout modules. If an entered phone is not identified, members are redirected to the **Register With Us** page.
- **Register With Us** page – This page is used for non-registrants to sign up in order to give via donation kiosk. This page uses the Kiosk Register module where you can select default Member Status for new contributors. This page also uses the Idle Timeout module.
- **Enter Amounts** page – This page is where contributors can select funds. This page uses the Kiosk Enter Amounts module where the Swipe Page module setting is required. This page also uses the Idle Timeout module. Be sure to select which funds to make available on this

module.

- **Enter Payment Info** page – This page is where contributors swipe the payment method. This page uses the Kiosk Swipe Card module where the **Enter Amount** page, **Giving Kiosk Home** page, Payment Gateway, and Thank module settings are required. You can optionally set a specific batch name in the Kiosk Swipe Card module. This page also uses the Idle Timeout module.
- **Thank You** page- This page displays after a contribution is processed. This page uses the Kiosk Thank you module where the Giving Kiosk Home Page is required. This page also uses the Idle Timeout module.

Customize Portal settings.

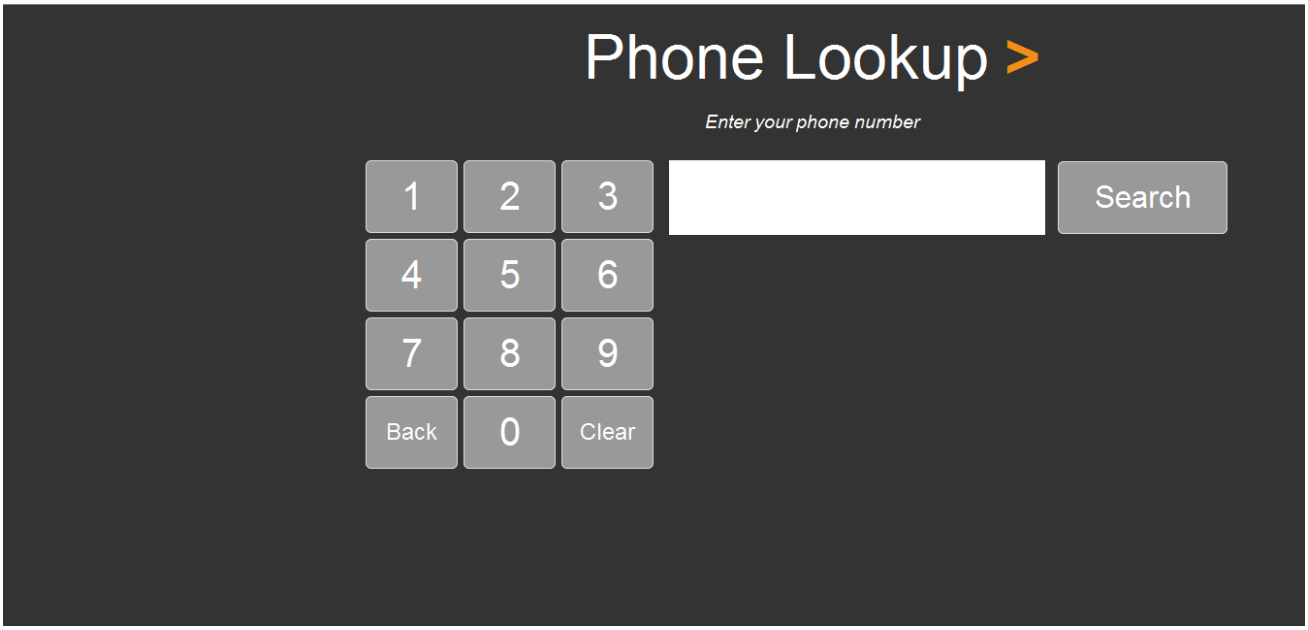


Start the Contribution Statement Agent.

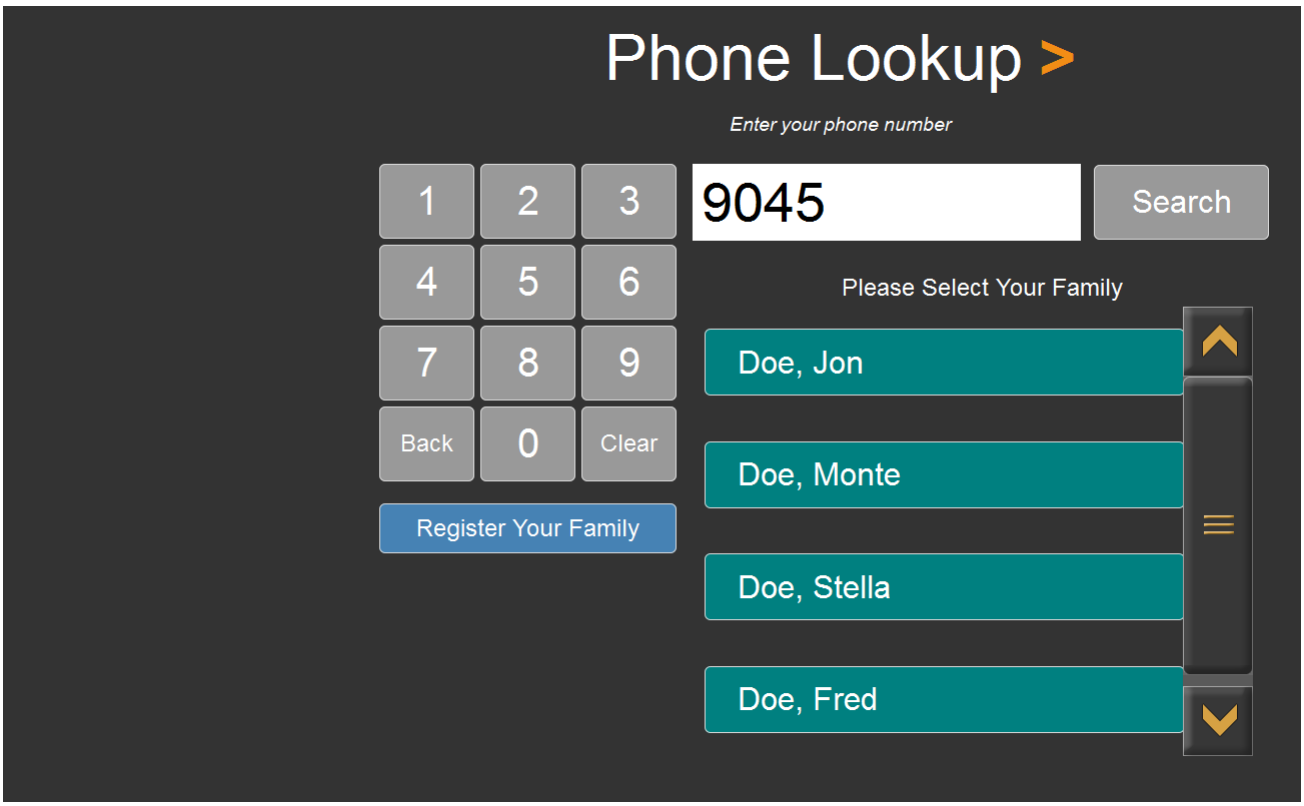
Customize the Contribution Statement System Email.

To Use the Giving Kiosk

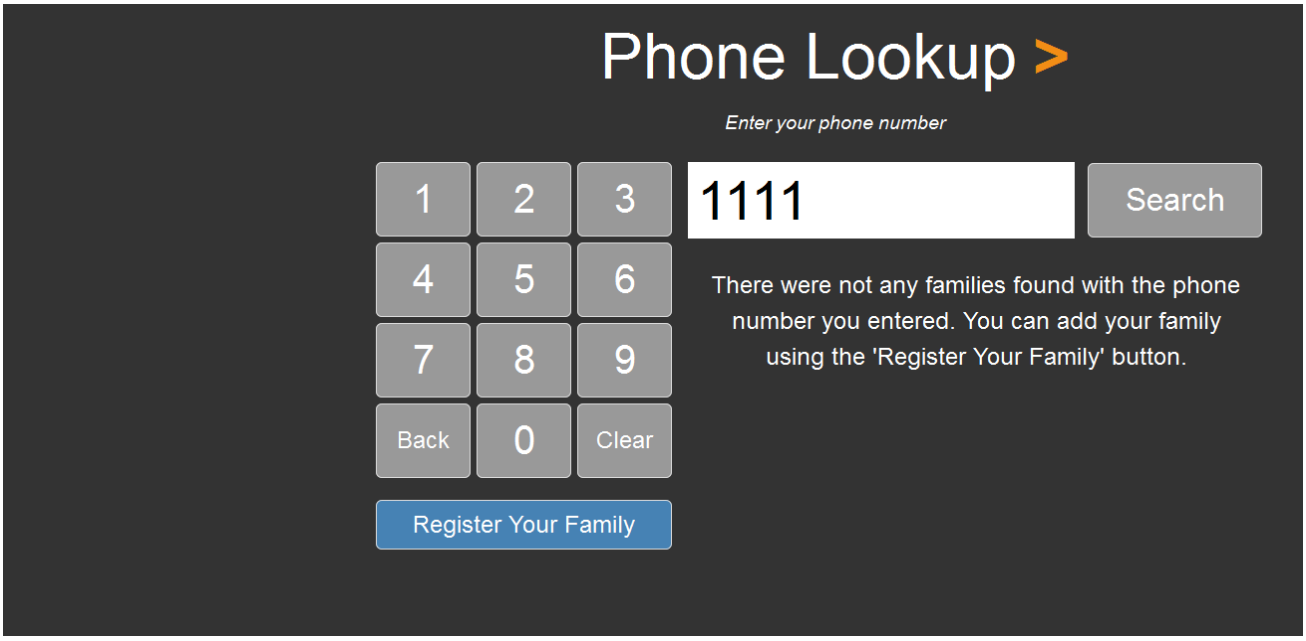
Go to the Giving Kiosk portal.



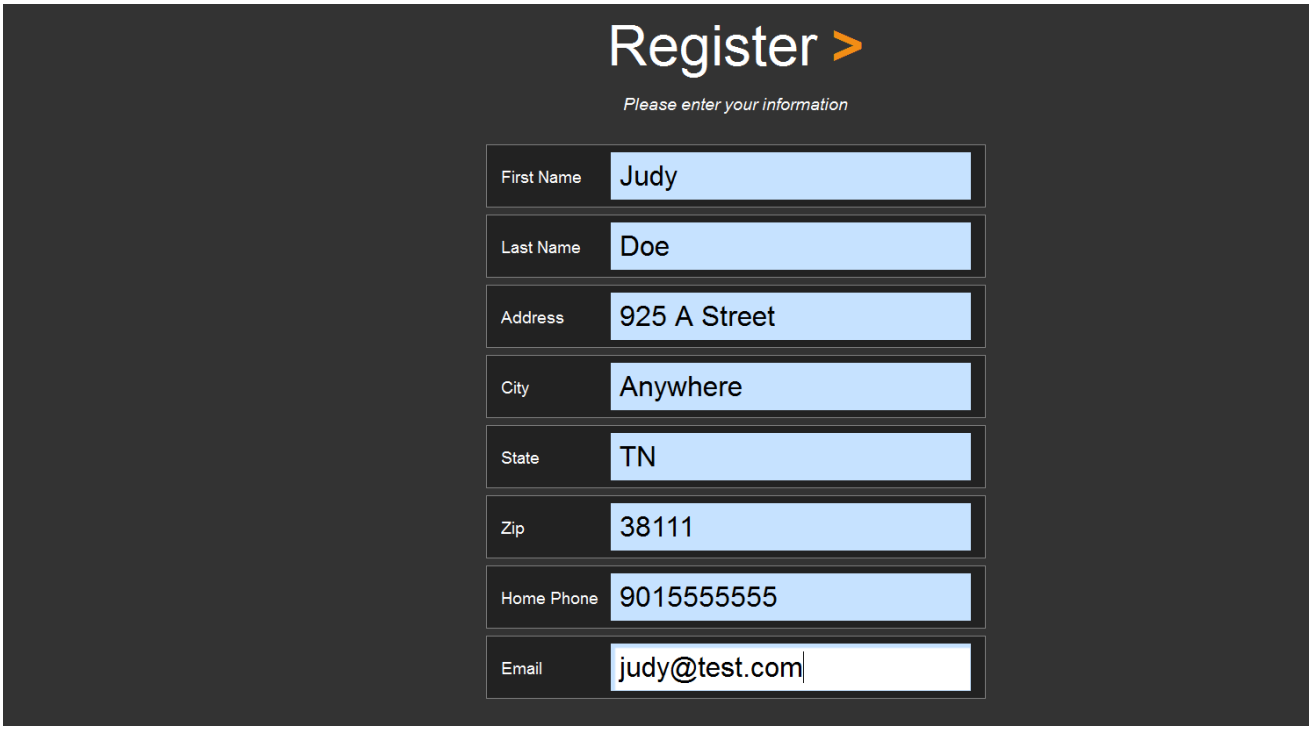
Enter the last four digits of the person's phone number. Use any phone number type on the person's record.



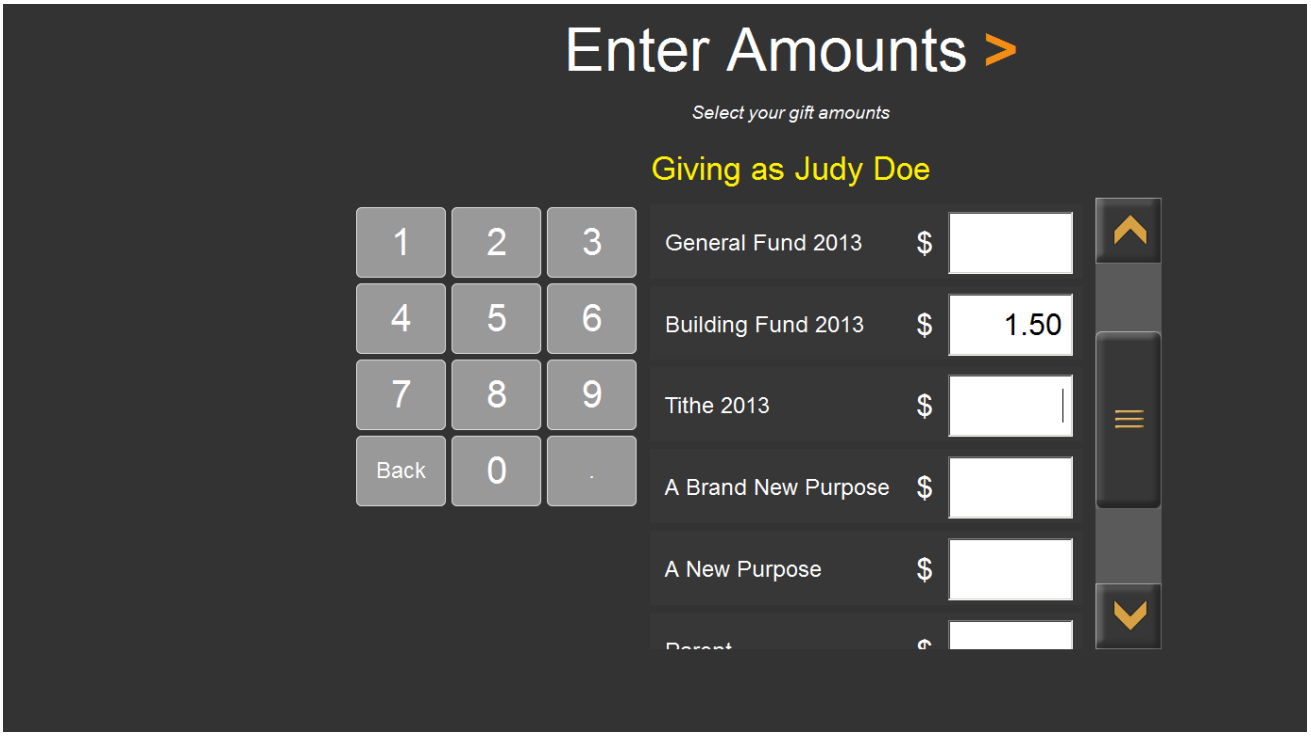
For non-Arena records, the below screen displays.



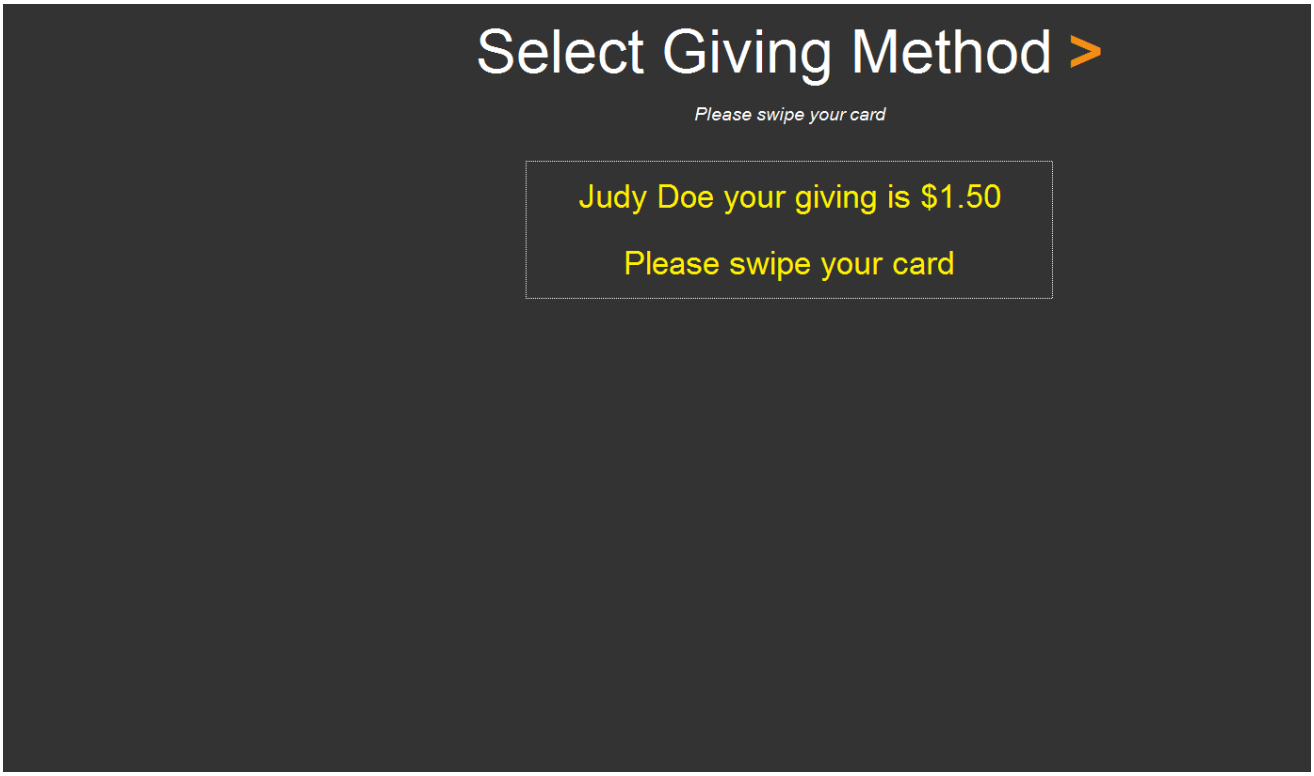
You can also add new records.



Enter amount in the applicable fund fields.



Swipe card.



Mobile Portal

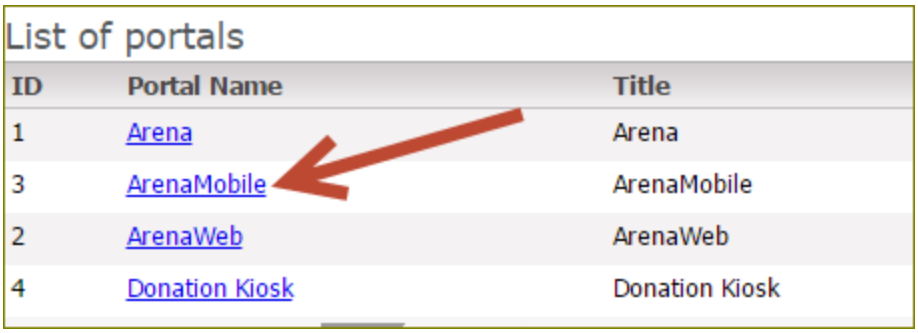
The mobile portal is designed to allow staff members to access Arena from browser-enabled mobile devices. As such, the pages use simple templates and do not have the script handling capabilities of a full web site. The mobile portal allows staff:

- Search, view and edit records
- Send emails to existing records
- Upload member photos
- Use Check-In to check someone in
- View subscribed Personal and subscribed Tags
- View My Lists
- View list of Staff
- View and update prayer list requests
- Enter record notes with the option to mark them private

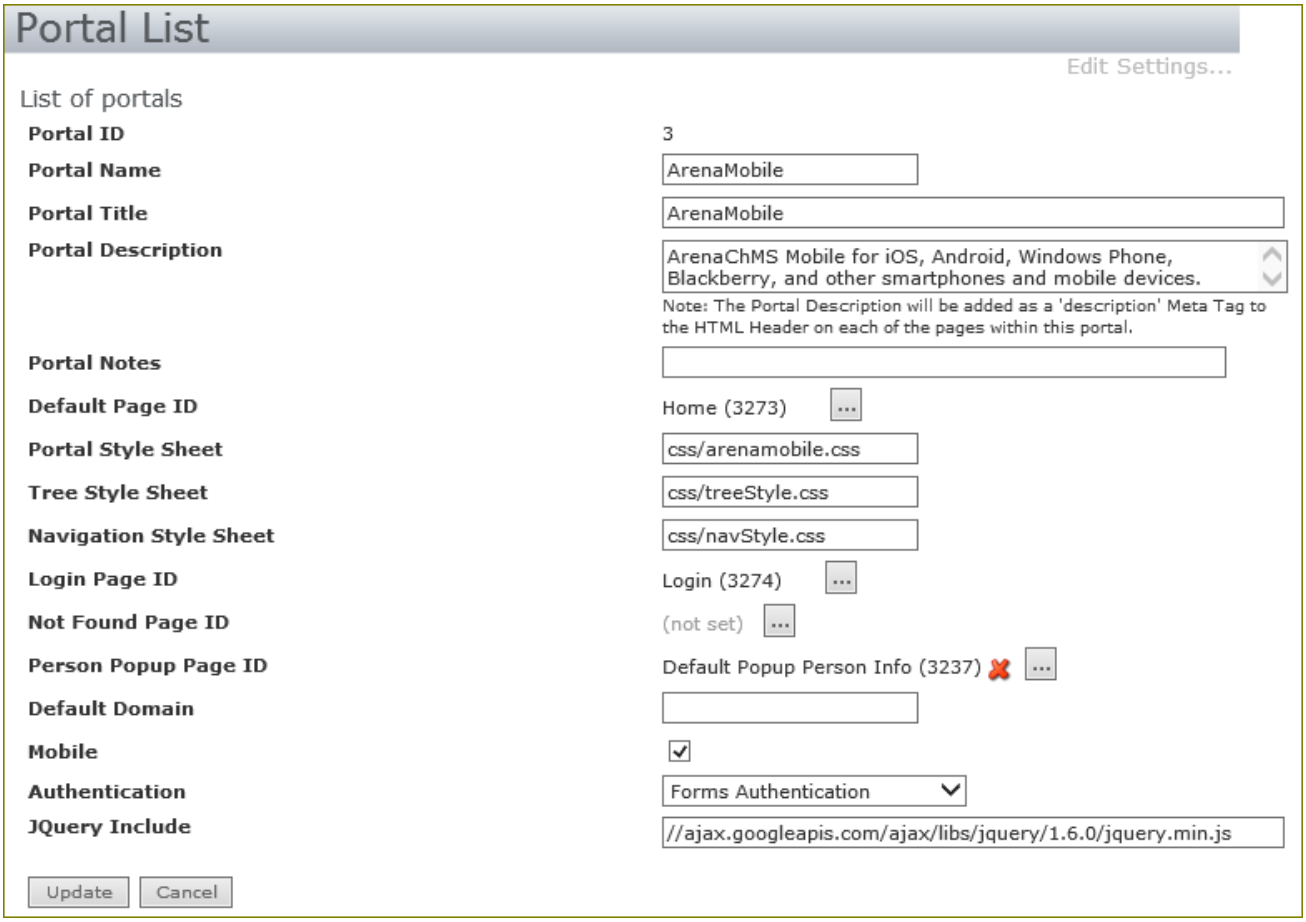
The mobile portal, template, pages and modules are already in place. You can elect to make all available features available to your staff or customize specific features.

Mobile Portal Settings

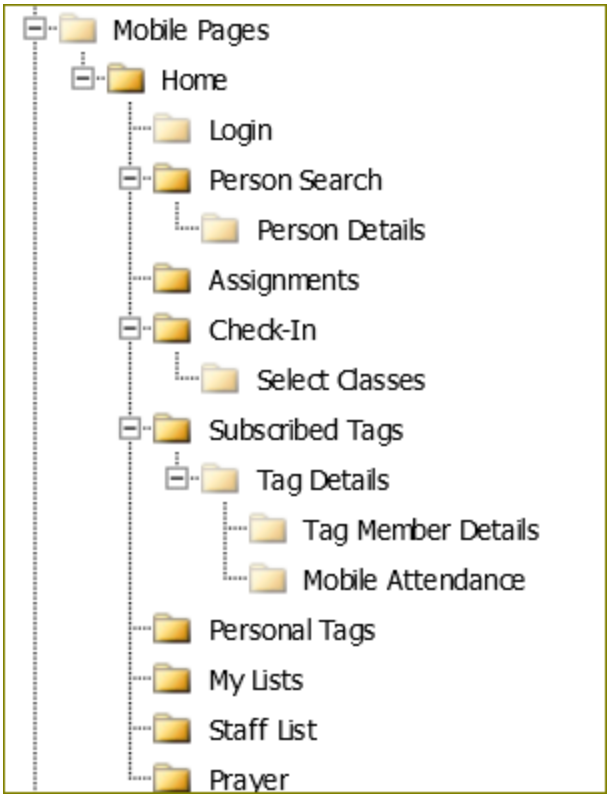
To view the portal settings, select the portal from the **Portal List** page.



In addition to the other steps previously covered to make the portal publicly accessible, enter the Default Domain on this page.



Next, review the pages and module settings for all available pages. You can elect to implement all available features or just the ability to search and view records.

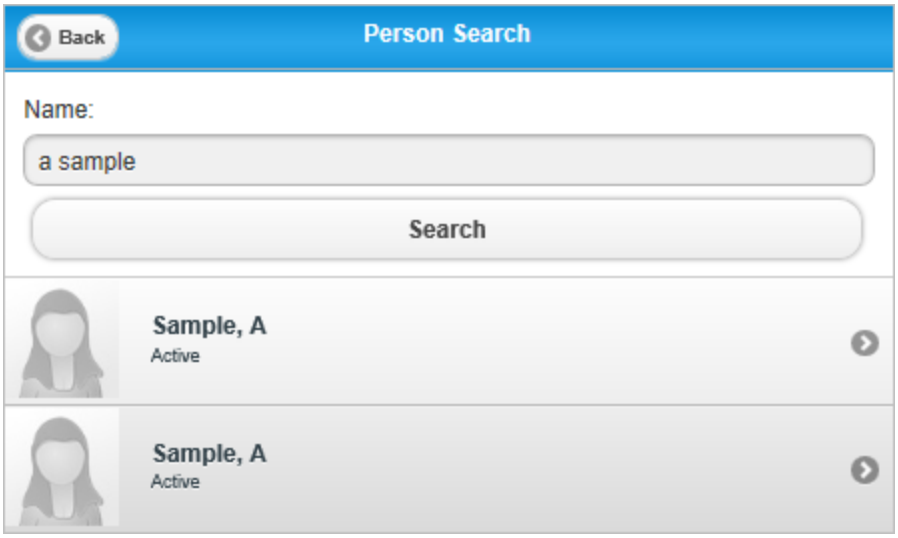


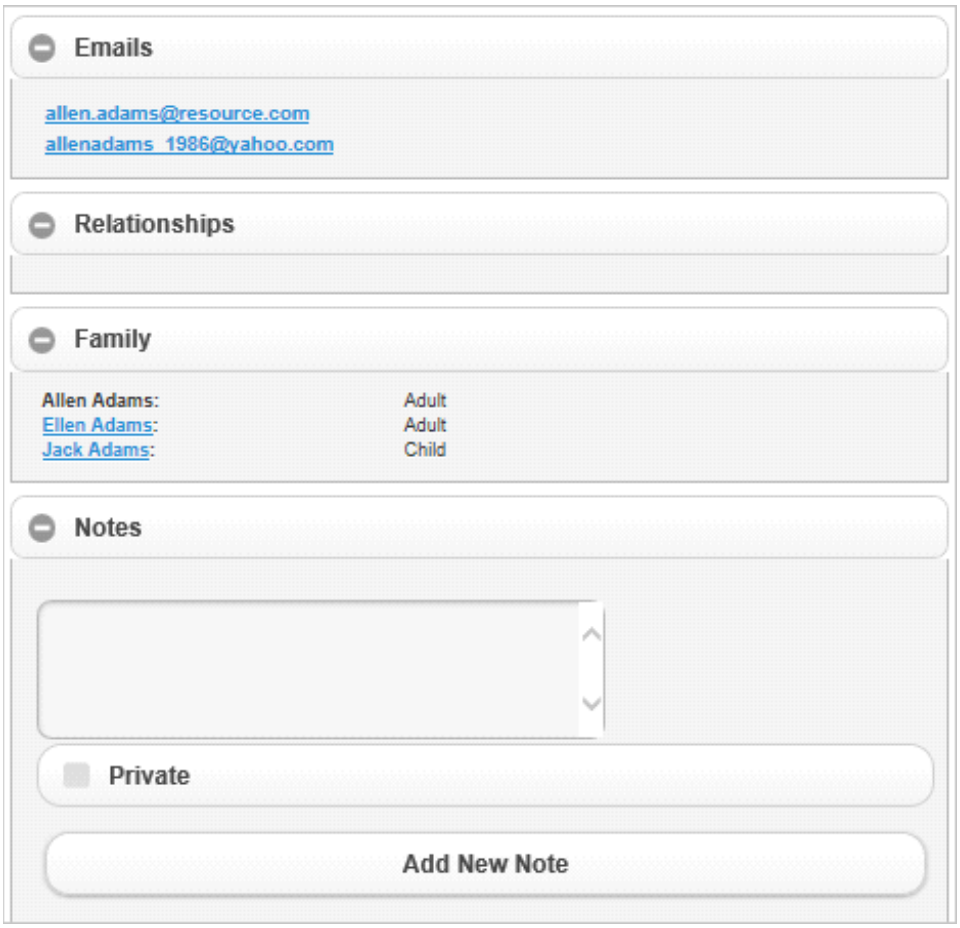
- **Login** – This is the login page for the portal.
- **Home** – This is the home page after a user logs in. This page uses the Mobile Person Quick Search module with **Person Search** page setting, the Page Navigation module with required XsltUrl setting. You can also add the LoginLogout module.
- **Person Search** – This page is for searching for records and uses the Person Search module with Mobile Person Details Page setting.
- **Person Details** – This page is the mobile version of the **Person Detail** page and uses the Person Details module with optional mobile Check-In setting.
- **Subscribed Tags** – This page displays all Tags the user subscribes and uses the Mobile Profile List module with required **Profile Details** page, **Profile List Type** page, and XSLT Path.
- **Profile Details** – This page displays the Tag details and requires the Profile Details module with Mobile Profile Member Detail Page setting.
- **Profile Member Details** – This page displays a tag member and uses the Profile Member Details module with **Mobile Person Detail** page setting.
- **Subscribed Groups** – This page displays all Groups the user subscribes and uses the Subscribed Groups module with the XSLT Path.
- **Check-In** – This page displays the mobile Check-in and uses the Mobile Check In module with the **Mobile Check Out** page and **Mobile Person Details** page settings.
- **My Lists** – The page displays all lists from the **My List** page for the current user and uses **Mobile Person Details** page setting.
- **Prayer** – This page displays all prayer requests for the selected or specified Prayer Categories and uses the Mobile Prayer Session mobile and the desired categories selected.
- **Personal Tags** – This page displays Personal Tags for the current user and uses the Mobile Profile List module with the required **Profile Details** page, **Profile List Type** page, and XSLT Path setting.
- **Staff** – This page displays all records marked as Staff and uses the Staff List module with optional Description Attribute and **Mobile Person Details** page settings.
- **Assignments** – This page displays assignments for the current user and uses the Mobile Assignments module with the **Mobile Person Details** page setting.

Mobile Users Page

From the search results page, users can view and edit individual information. Security permissions

determine view and edit rights.





After selecting a record, Arena displays a modified **Person Detail** page.

Back | Allen Adams | Edit

Home

Person Search

Allen Adams

Start Workflow

Personal Information

Person/Foreign ID:	3/2
Member Status:	Unknown
Record Status:	Active
Name:	Mr. Allen Adams
Birth Date:	12/11/1979
Age:	33 Yrs, 10 Mos, 4 Days
Gender:	Male
Marital Status:	Married
Anniversary:	
Grade:	
Contribute Individually:	Yes
Medical Info:	
Added:	7/7/2009
Modified:	11/17/2010
Last Verified:	1/1/1900 Verify

Addresses

Main/Home Address (Primary):	12 Cherry St. Cordova, TN 38018

Phones

Main/Home:	(901) 520-5684

Users can check a person into an available class, add the person to a Personal Tag or start an Assignment Workflow.

AT&T
11:04 AM
Back
David Ellis
Edit
David Ellis
Check David into a class
Add To Personal Tag
Start Workflow

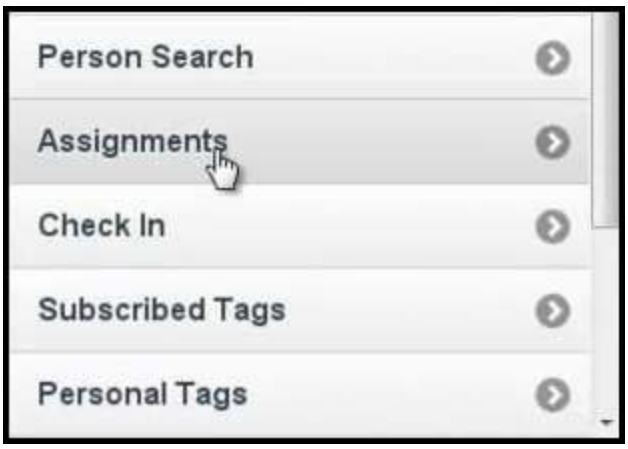
Add person to a Personal Tag.

Users can check-in regular attenders and search for people checked in.

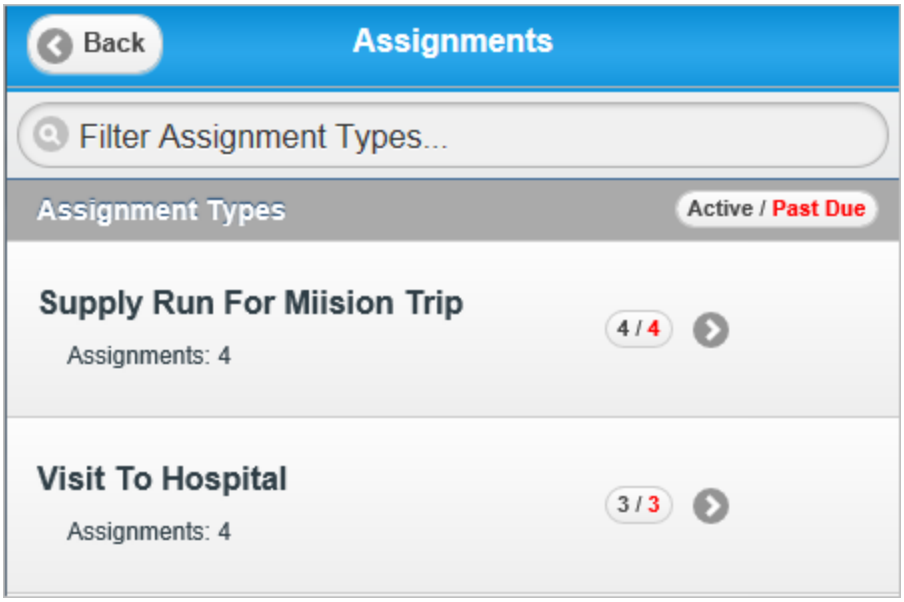
Available Classes

Users can start a **Workflow Assignment** from the **Person Detail** page.

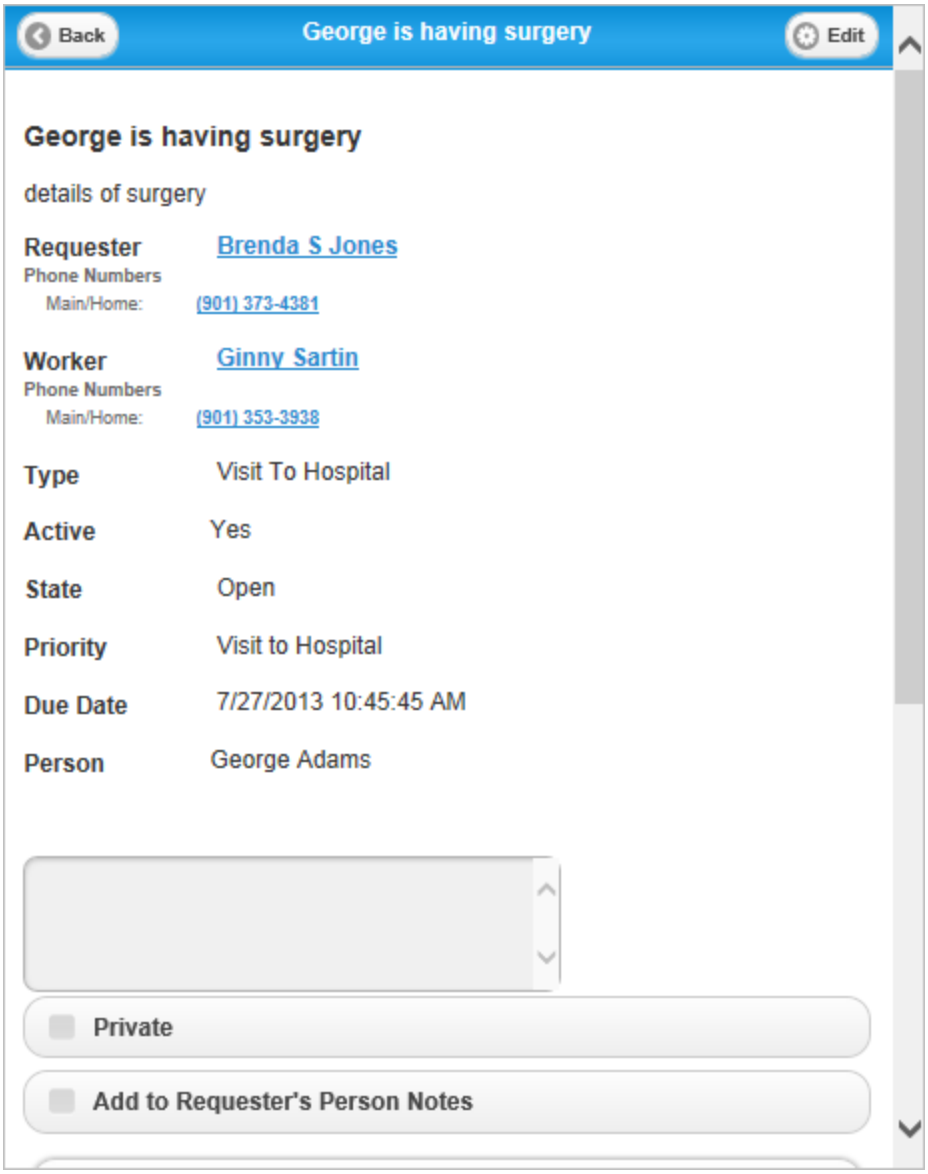
View **Assignments** of which the user is a worker, requestor or a subscriber.



Assignment Type



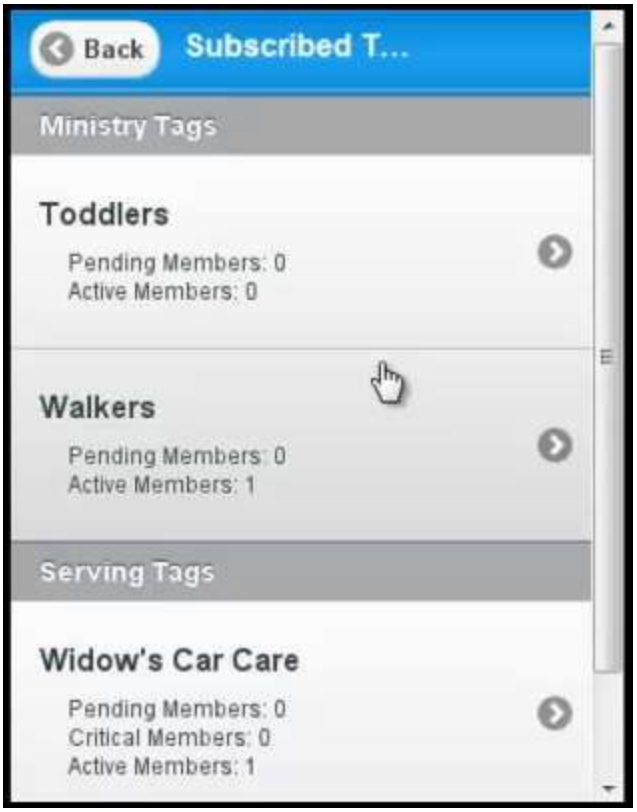
Workers can access and update assignments.



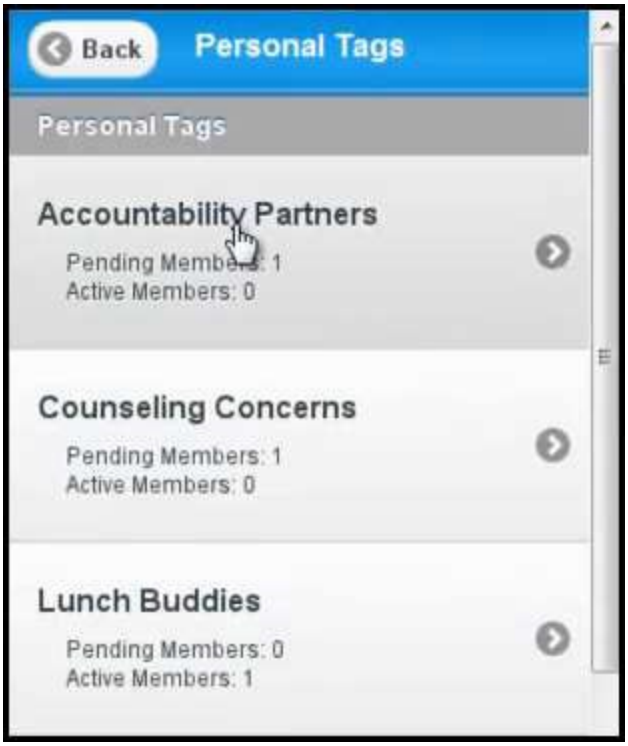
NOTE: Notes are displayed in a shorted form. Click on the shorted form of a note to expand it.

Users can view subscribed Tags and all Personal Tags.

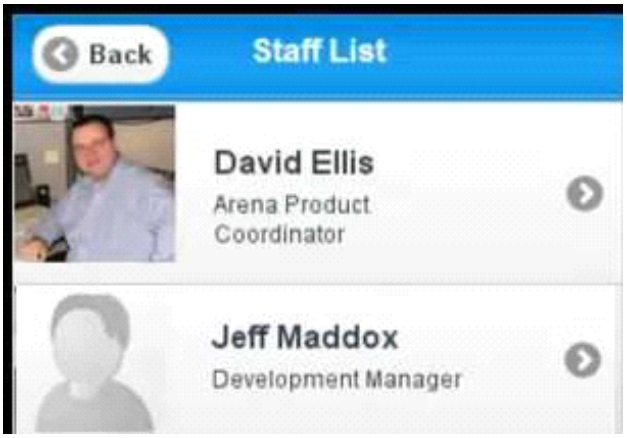
Subscribed Tags



Personal Tags

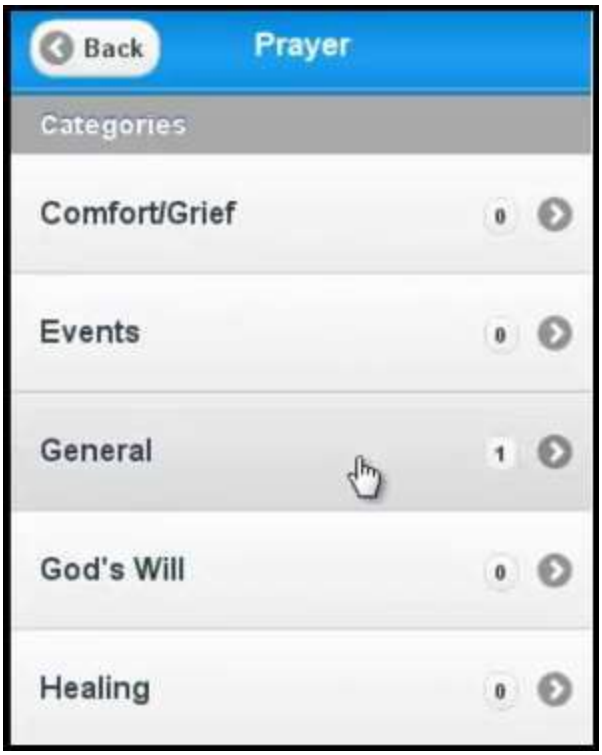


Users can view My Lists and a Staff List.



The Prayer Team can access the Prayer Ministry Toolbox.

Prayer Ministry Toolbox

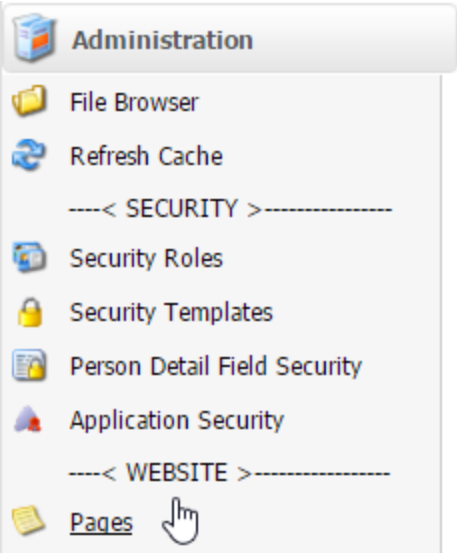


New Account Request

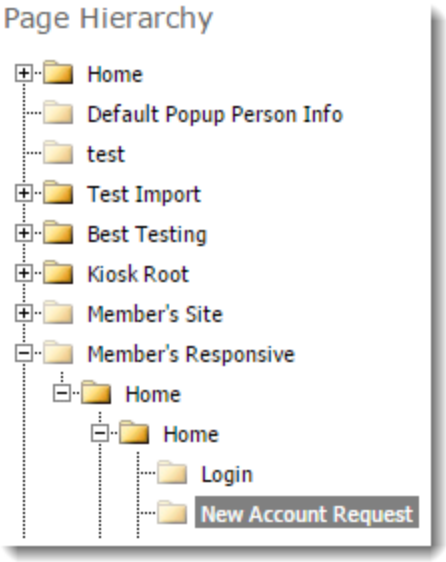
When adding a new account, there is an option for Campus. The following steps explain how to setup and verify the Campus option on the **New Account Request** (portal) page.

Step-By-Step

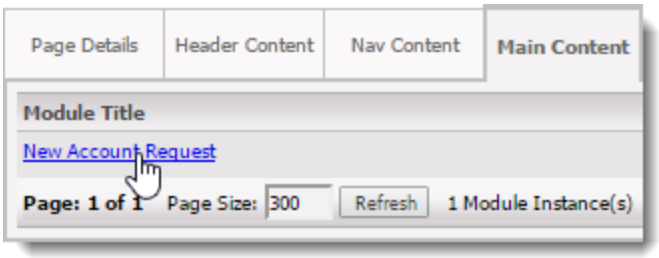
1. From the **Administration** menu, select the **Pages** option.



2. Navigate to the **New Account Request** folder.



3. Select the **Main Content** tab, and then click on the ***New Account Request*** module link.



4. The **Display Campus Selector** drop-down is set to "False" by default. Set the **Display Campus Selector** to "True" and then select a campus from the **Default Campus** drop-down.

NOTE: You can change the **Default Campus** even when the **Display Campus Selector** is set to "False". This does not display a Campus on the portal, but simply allows you to set a campus default for when and if you decide to change the **Display Campus Selector** to "True".

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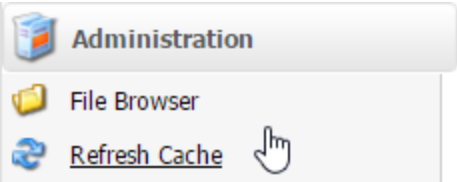
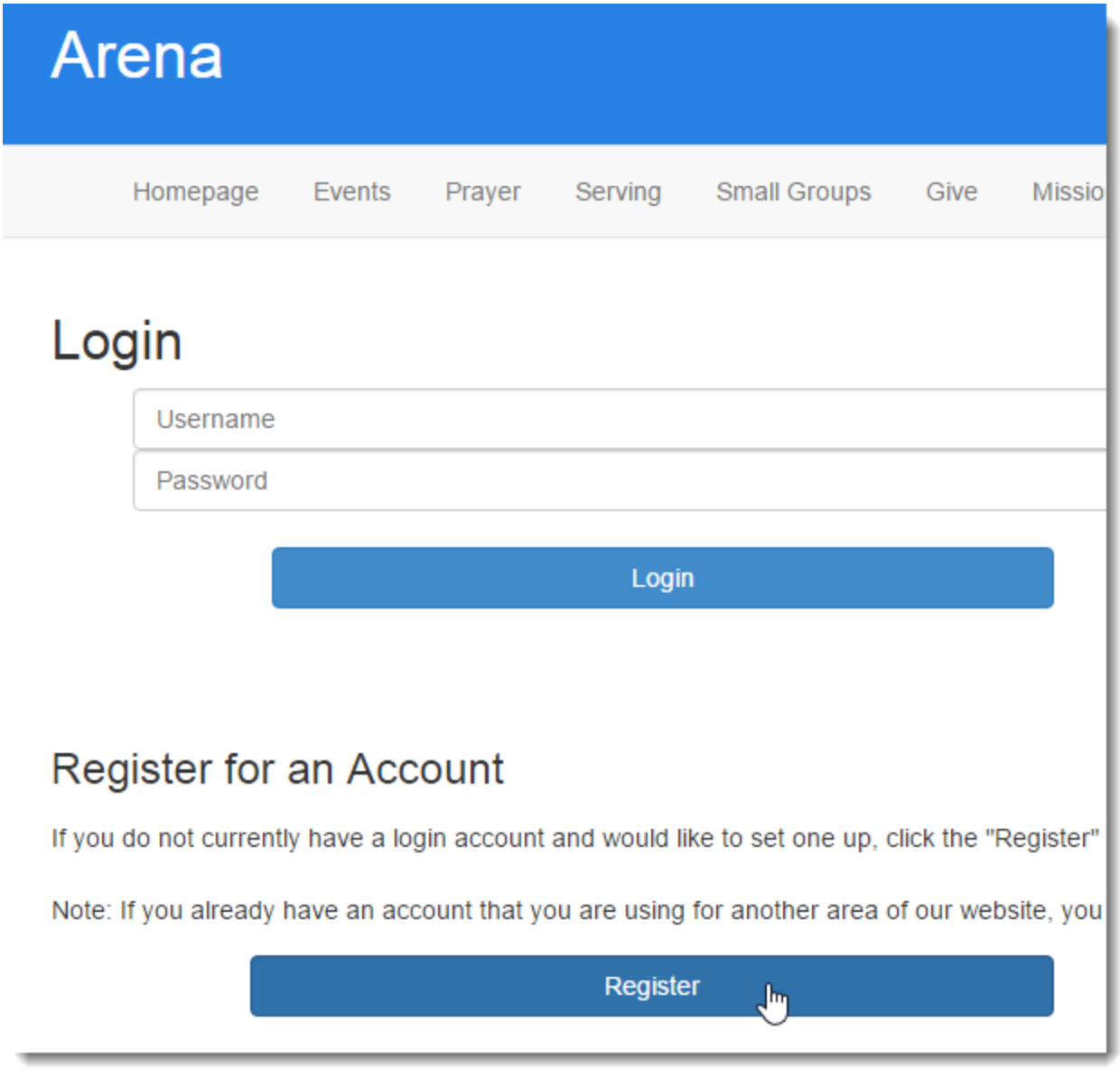
5. After verifying your changes and then click the Update button.

6. From the **Administration** menu, select the **Refresh Cache** option.



7. Go the **Members Responsive Portal** on your browser and select the **Register** button.



8. Notice the **Campus** drop-down is available with the default campus selected.

Index

E

Event Tag, 224