

Web Office Tour

The Web Office is the administrative heart of your churchinsight web site. This powerful tool enables you to create new content for the web site, manage the contact details and involvement of each of your members and complete many of the day-to-day tasks of church administration.

This quick start guide provides a brief overview of each of the areas of the **web office** and how you can begin delegating responsibility for certain tasks to different people.

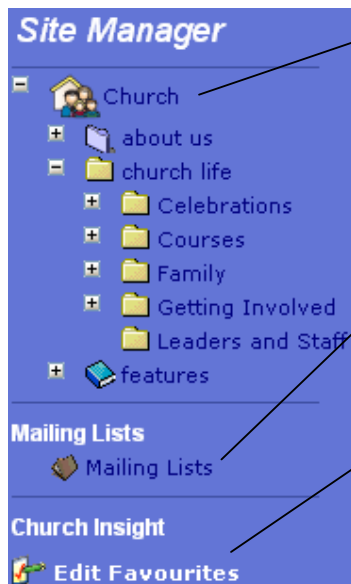
Entering the Web Office

You can go into the **web office** for your church as follows:

- If you haven't logged into the web site already, do so now. Click the **Login** link at the top of the home page and enter the login name and password as supplied.
- Once you have successfully logged in click the **web office** link at the top of the home page. The Web Office will be displayed shortly afterwards.

The **site manager** area of the **web office** is divided into three areas as follows:

➤ The navigation pane



Folder Structure

The **folder structure** combines the ability to manage contact information for the people in your church, the groups they belong to and the content on your web site.

Mailing Lists

Store contact information for visitors and friends of the church in the **mailing lists** area.

Network

Adding other church:insight web sites to your network favourites allows you to publish their articles and events on your own site.

➤ The task pane

The task pane allows you to access other administrative sections of the web office as follows:



Mailing – launch the **mailing** centre – a tool which enables you to communicate with different groups of the church using the most effective means.

Resources – launch the **resources** centre – an area where you can manage bookings for resources owned by your church.

Reports – produce reports on web site usage, organisational structure, attendance records and rota double-bookings.

Settings – configure your web site settings such as the address book policy, search engine keywords, and acceptable use policy.

Help – display the on-line help file - a comprehensive reference guide to using the church:insight system.

Exit - leave the **web office** and return to the church web site home page.

Note: Some of these items may not be available to you if you do not have the appropriate access permissions.

➤ The work pane

The contents of the work pane depends on which item is currently selected in either the **navigation pane** or the **task pane**. Select one of the folders in the **site manager** area to display a series of tabs as follows:

Summary	- display an overview of the contents in the currently selected area.
Documents	- create and publish articles and adverts on your web site.
Media	- manage images, downloadable files and audio/video resources
Forums	- moderate the discussion forums belonging to the selected area.
Chatter	- display information about the chatter zones available in your group.
Events	- display the calendar for this group and add new events.
Rotas	- organise rota duties for members of the group
Attendance	- record attendance data for the group and track attendance trends.
Bookings	- display any bookings made by this group for items stored in the resources centre.
Members	- manage membership of the group and display/edit contact information.
Permissions	- delegate responsibility for different tasks by assigning permissions to other people.

Note: Some of these items may not be available to you if you do not have relevant permissions or they do not apply to the currently selected item. See the **site manager** section below for more information.

The Site Manager

Most of your work in the **web office** will be done in the **Site Manager** – the area of the web office designed for managing your church contact database as well as the content on your web site. The Site Manager is divided into the following areas:

🏠 Church home

Church home represents your central church database. Every name that appears in one of the normal groups (see **group folders** below) must also appear in the church home **group members** list. Some of the people in this area will also appear in the **address book** of your church web site – for more information see the “Contact Management” quick start guide.

Church home also allows you to configure which people have access to the church web site and process new applications.

The only options available in the work pane are: **Summary, Members, and Permissions**

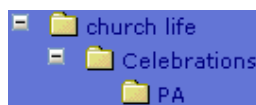
📄 About Us

The **about us** section allows you to create content to introduce the church to site visitors – for example, “our vision” “church history”, “contact us” etc.

The only options available in the work pane when an **about us** folder is selected are: **summary, documents, media, and permissions.**

📁 Group folders

The **group folders** represent the organisational structure of your church - this allows you to delegate responsibility for the content of the site and quickly show the involvement of your church members. For example your PA team might be located as follows:




★ **The Golden Rule of membership** – membership of any group *automatically* makes that person a member of the group above. For example if Jim is a member of the PA team he will also *automatically* become a member of the Celebrations group, the church life group and **church home**. The only exception to this is when the group is *independent* - for more information see **independent groups** below.

Each group folder can store media, documents, forums, rotas and attendance data (and hence all the tabs in the work pane may be available). This has two important applications:

1. You can assign one person from a group to be responsible for just one task. For example, Jim in the PA team can be given rota permissions for the PA group folder. This allows him to create a rota involving members of the PA team – none of the rest of the web office will be available to him.
2. Any group which contains one or more documents will appear as a group on your church web site under the **church life** menu option.

See the **permissions** section below for information on how you can assign permissions to another person enabling them to perform tasks in the web office.

Some of the folders in the **group folders** area are represented by a special icon - ; these groups are known as **independent groups**. In most respects an independent group behaves in the same way as a group folder, with the following exceptions:

1. Independent groups break the "golden rule of membership" – belonging to an independent group does not make you a member of the groups above; notably this does not make you a member of **church home**.
2. An extra permission is available to allow people to maintain contact information for the people in this group (ordinarily this is only possible within **church home**).
3. Independent groups can grant restricted login access to the church web site. On the registration form the option is given to register for a restricted login account rather than a church login account.

Independent groups can therefore be used for groups in the church which involve people who are not part of the church but who may still participate in forums and rotas and who may need to see private documents or events. When a person with a login account belongs to an independent group only the **only** names they will see in the **address book** of the web site are other members of the independent group. This feature can be used for groups such as the football team (where people from outside the church play in the team and need to be able to see the fixture list and contact other members of the team), or a "membership gateway" where people who are in the process of joining the church need limited access to the web site.

Web site permissions

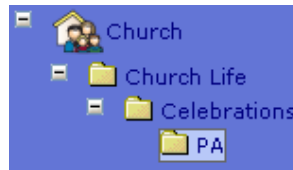
Each element of the **site manager** area has a **permissions** section which allows you to restrict access to certain tasks and delegate responsibilities. The permissions available are as follows:

- ↻ **Documents and media** – the ability to create articles and adverts on your web site as well as upload images, audio, video and downloadable document files.
- ↻ **Events** – the ability to add new events to the calendar for the group.
- ↻ **Forums and chatter** – the ability to moderate forum content available in the group as well as create and remove forums and chatter zones.
- ↻ **Group Structure** – the ability to change the name and edit the properties of a group, and create sub-groups using the **advanced options** section of the **summary** view.
- ↻ **Membership Manager** – the ability to add and remove members from the group.
- ↻ **Edit members' details** – the ability to edit the contact information for a group member and enable/disable web site access.
- ↻ **Group notes editor** – the ability to see and edit custom information for members of the group.
- ↻ **Sensitive group notes** – the ability to see and edit custom information in the group which has been marked as "sensitive".
- ↻ **Database manager** – the ability to add new custom information fields to the database for the group.
- ↻ **Rotas** – the ability to create and publish rotas involving members of the group.
- ↻ **Mail** – the ability to use the **Mail Office** feature to communicate with members of the group.

- **Attendance** – the ability to complete attendance records for your group and see any existing records.
- **Resource Booking** – the ability to book resources from the **resources** centre on behalf of the group.

Note: Some of these items may not be available to you if you do not have relevant permissions or they do not apply to the currently selected item.

If you do not have any permissions on a section of the **site manager** it will not be visible; for instance if Jim in our earlier example has just one permission – the ability to create rotas for members of the PA team the **site manager** area will look like this:



Only the **summary** page will be available for the **celebrations, church life** groups, and **church home**. In the PA group folder only the **rotas, permissions** and **summary** tabs will be available. In the permissions tab the only permission Jim can assign is the **rotas** permission.

★ **Golden Rule of Permissions 1** – you may only give to other people a permission you already have for a particular group. Any permission you do not have will not be visible.

The **permissions** tab in the PA group may also list a number of other people for which the check boxes are disabled. These people have the rota permission in a parent folder and therefore can make changes in this group.

★ **Golden Rule of Permissions 2** – having a particular permission for any group folder *automatically* gives you the same permission for all sub-folders. Consequently you can think of *membership* cascading up the site manager tree (see “golden rule of membership”) and *permissions* cascading down.

The advantage of this approach is that the web site administrator need only to have all permissions at the **church home** level in order to be able to edit content for any group in the **site manager**. Similarly the person responsible for all small groups need only have all permissions at the “small groups” folder to be able to administrate all of the sub-groups below.