Group Notes and Global Fields

Introduction

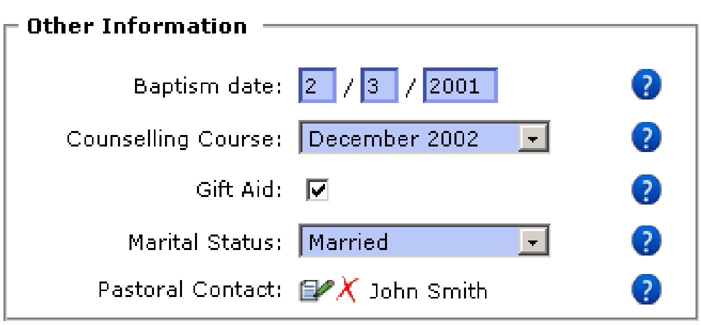
The default contact information held in the **church**insight address book is limited to common details such as name, address, telephone number etc. In addition to this most churches have other pieces of information they wish to store, for example:

- **People relationships** such as pastoral contact and discipleship mentor.
- **Dates** such as baptism date, graduation date, marriage date etc.
- **Notes** such as pastoral records, allergies etc

These pieces of information vary from church to church and as a result it's impossible to create a 'one-size' fits all database. This is where **global fields** and **group notes** comes in

What are Global Fields?

Global fields are pieces of information you would like to store alongside the normal contact information fields, they are therefore information you would store for everyone across your database. At the bottom of the **user details** window these fields are contained in a section called **Other Information** as illustrated below:



Global Fields and Permissions

The only place you can create global fields is in the **root group** – the icon at the top of the **Site Manager** area with your church name:

Church Name

The permissions which relate to creating and editing global fields can be found in the **member info** section of the **permissions** view in the root group. The permissions available are as follows:

- **Edit Members' Details** –this privilege allows you to edit user's details including the global fields you have created.

- **Database Manager** – this privilege enables you to create, remove and change the properties of a global field.
- **Sensitive Group Notes** – this privilege enables you to see and update the contents of global fields which are marked 'Sensitive'. More on this later…

Adding a Global Field

In order to add this field to your database you **must** have the **edit members' details** and **database manager** privileges listed above:

- Click the **Church Name** icon in the **Site Manager** area of the web office navigation pane.
- Select the **Group Members** tab; the group members view will be displayed shortly afterwards.
- Click the :

Change the structure of group notes and global fields stored for the **Church Name** site task

; the **field editor** will be displayed shortly afterwards. If any group notes or global fields have been created they will appear in a list as illustrated below:

Field Name	Description	Type	Sharing	Sensitive		
Counselling Course	Counselling Diploma Level 1	List Box	global	No		
Gift Aid	Are they a UK taxpayer?	Yes / No	global	No		
Pastoral Contact	Staff Pastor	Link to Member	global	No		

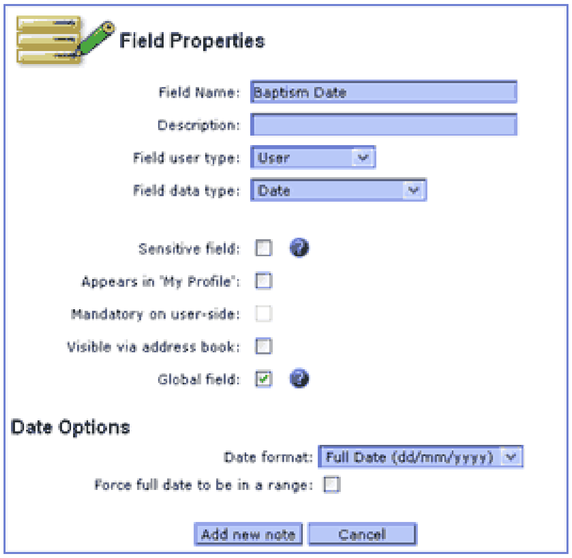
At the bottom of the list click the:

Add another field to the **church name** group.

task; before you begin to add another field to the database, you will be asked to check that the field does not exist elsewhere already. Keeping the information in your database accurate and simple is very important to making the most of **church**insight; this step is designed to prevent duplication and so you should check carefully before proceeding. If you do find a field with the same purpose already in the list click the **[show]** link in the **owners** column to find out who has the necessary privileges to share the information with you.

If you are confident that the field does not exist elsewhere click **the data is not already present** option and select the **OK** button to proceed. The **field properties** window will be displayed shortly afterwards.

Enter the details of the new global field as illustrated below:



Field user type – Set to **User** to add a field that relates to people and **Organisation** if it relates to an organisation.

Field data type - Set to appropriate field type. e.g. **Date .** Cannot be changed once data has been added.

Sensitive field – Only visible in the Web Office to those with the Sensitive Group-Note permission

Appears in 'My Profile' – Select this option if you would like the user to see and edit the details themselves. If selected the field will also automatically appear on the Site Registration page.

Mandatory on user-side – Forces the user to fill in this field. Only available if the field is editable by the user (see My Profile option above).

Visible via address book – If selected this field will display in the user's Address Book contact details.

Global field option is **on**.

Validation options – Depending on the field type selected different validation options will appear, which force the user to enter data in the required format.

Click the **Add** button to complete the process. The list of fields in the **field editor** window will be updated shortly afterwards.

To check that you have successfully created this new field, click the **group members** tab and select any name from the **group members** list. The **Other Information** section should now show the field you have just created:

Other Information

Baptism Date: / /

Changing the properties of a Global Field

You can change the properties of an existing global field to alter the name, edit its settings and change the format of the data. Using the example above we are now going to make the baptism field available in the **my profile** area of the web site so that each member can update the information themselves:

- Click the **Church Name** icon in the **Site Manager** area of the web office navigation pane.
- Select the **Group Members** tab; the group members view will be displayed shortly afterwards.
- Click the :

Change the structure of group notes and global fields stored for the **Church Name** site

task; the **field editor** will be displayed shortly afterwards. The list of group notes and global fields will appear in a list as illustrated below:

Field Name	Description	Type	Sharing	Sensitive	
Baptism Date		Date	global	No	
Counselling Course	Counselling Diploma Level 1	List Box	global	No	
Gift Aid	Are they a UK taxpayer?	Yes / No	global	No	
Pastoral Contact	Staff Pastor	Link to Member	global	No	

- Click on the button for the **baptism date** row; the **field properties** window will be displayed shortly afterwards.
- Tick the **Appears in 'My Profile'** option.
- Select the **close window** button. The properties of this global field have now been updated.
- You can confirm that this field can now be updated by each member by leaving the web office and visiting the **my profile** option under **my area**:

Other Information

Baptism Date: / /

What are Group Notes

Group notes is an extension of the principle of global fields. Some of the information you might wish to keep is really only relevant because that person is a member of a particular group. For example, you may wish to record the graduation date of a student; this information is not data you need to store for the rest of your users but it's very useful for a student leader to be able to store. **Group notes** are therefore elements of information which are pertinent to a person **because** they belong to a specific group.

Group notes information is displayed in a separate area of the **member info** and **edit members details** windows:

Details	Rotas	Involvement	Mail History	Group Notes
Accountbility	John Smith			?
Car?	☑			?
w/e away '03 paid	£30			?
w/e away '03 room no.	E07			?

The advantage of using group notes is that information which is relevant to just one group can be stored in the area where it is most useful, without cluttering the main contact information.

Group Notes and Permissions

As with global fields, in order to create, edit and delete **group notes** you must have certain privileges as follows:

Group Notes Editor – the ability to edit **group notes** for the currently selected group. Don't forget that privileges 'cascade' – i.e. if you have the **group notes editor** privilege on the 'church life' group you will be able to edit group notes in every sub-group.

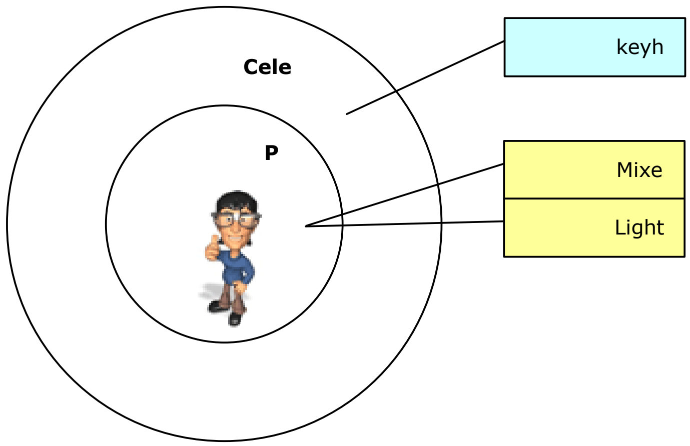
Sensitive Group Notes – this privilege allows you to see and edit the group notes which have been marked as 'sensitive'. More information on sensitive fields is given below.

Database Manager – this privilege allows you to create new **group notes** fields and modify the properties of existing ones.

You'll notice that many of these privileges are the same as those required for global fields – the important difference being that global fields can **only** exist at the root group. You should therefore ensure that those people who are going to be group notes editors have those permissions **only** at the folder they are responsible for. By default anyone who has **membership manager** privileges for a group will also have the three permissions above. **Note:** it will therefore be the responsibility of a group leader to make sure that the permissions are correctly assigned if they wish to begin storing sensitive group notes.

What group notes will I see?

The **group notes** that you see when you open the **member info** window is a combination of the *involvement* that the person has and your *permissions*. To understand how this works we'll use an example; Bill is a member of the 'PA team' and the 'PA team' group is a sub-group of 'celebrations':



Three **group notes** fields have been created:

- In the 'celebrations' group we have a **Yes/No** field to record who is a keyholder to the building.
- In the **PA** folder we have a two **Yes/No** fields to indicate which people in the group have been trained on mixing and lighting.

Because Bill is a member of the 'PA team' he will have a note in his records which indicate whether he has been trained on mixing and lighting. Since the 'PA group' is a sub-group of 'celebrations' Bill will belong to that group too[1] - and he will therefore have a note in his records to indicate if he is a keyholder.

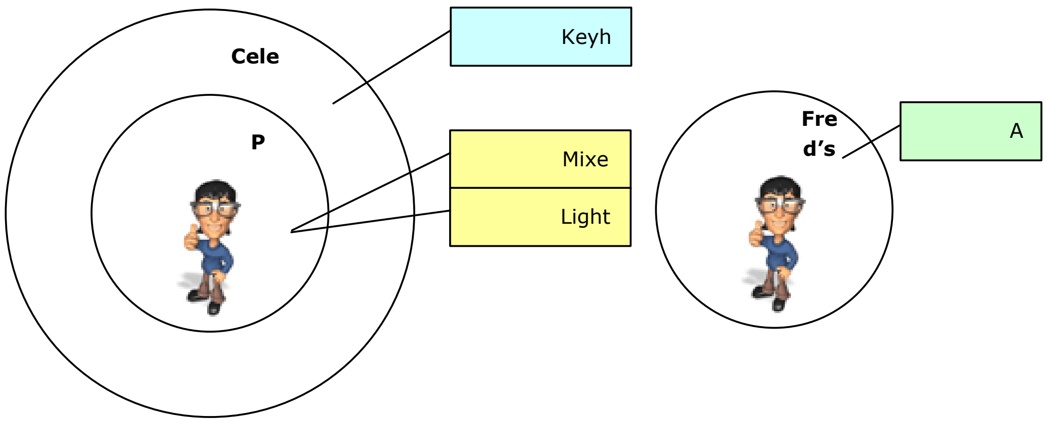
So far we've defined which group notes Bill will have – but your ability to see them all depends on your *permissions*. If you have **group notes editor** privileges on just the 'PA team' the only fields you will see in the group notes view will be 'mixer trained' and 'lights trained'. Since you don't have permissions to see group notes for 'celebrations' the 'keyholder' field won't be visible.

If, on the other hand, you have **group notes editor** privileges for the 'celebrations' group you will also automatically have this privilege for the PA group[2] and as a result when you display **group notes** for Bill you will now see all three group notes fields.

Note: It is important to remember that it doesn't matter which group you launch the **member info** window from – you will always see group notes based on what groups Bill belongs to and the privileges you have.

[1] The principle of membership in **church**insight is that if you are a member of a group you are also a member of the parent group, the only exception being **independent groups**.
[2] The principle of permissions in **church**insight is that if you have a permission in one group you also have that permission on any sub-groups.

So far, so good; we now know which groups notes we will see when the **member info** window is displayed for Bill. Supposing we now extend this example so that Bill is also a part of your small group i.e.:



The group notes that Bill now has are: 'keyholder', 'mixer trained', 'lights trained', and 'allergies'

If you have **group notes editor** privileges for 'PA team' and for 'fred's small group' you will now see the 'mixer trained', 'lights trained', and 'allergies' group notes for Bill but **not** the 'keyholder' group note.

To summarise therefore – your ability to see group notes for a person depends on:

- Group membership **–** Bill must be a member of the PA group to have 'mixer trained' and 'lights trained' records in his notes.
- Permissions – you must have **Group Notes Editor** privileges for the PA group in order to see Bill's records on 'mixer trained' and 'lights trained'.

Don't worry if this seems a little complicated – in practice all it will mean is that those with a higher level of permission will see a broad range of group notes across many groups (to save the trouble of locating the right person in the right group!) and those with permissions on just one or two groups will only see the group notes pertinent to them.

Example – adding a "musical instrument" field to the musicians group

In order to add this field to your group you **must** have the **database manager** privilege listed above:

- Click the **Musicians** group in the **Site Manager** area of the web office navigation pane.
- Select the **Group Members** tab; the group members view will be displayed shortly afterwards.
- Click the :

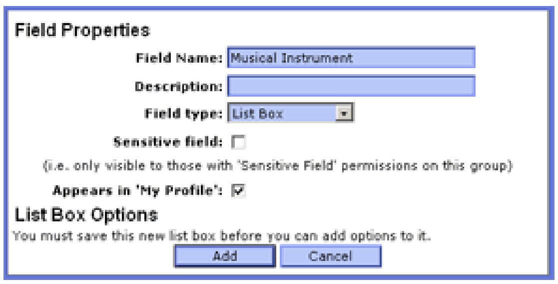
  task link; the **field editor** will be displayed shortly afterwards. Any existing group notes for this group will be listed in a table.

- Select the:

  task; before you begin to add another field to the database you will be asked to check that the field does not exist elsewhere already. Keeping the information in your database accurate and simple is very important to making the most of **church**insight; this step is designed to prevent duplication and so you should check carefully before proceeding. If you do find a field with the same purpose already in the list click the **[show]** link in the owners column to find out who has the necessary privileges to share the information with you.

- If you are confident that the field does not exist elsewhere click **the data is not present** option and select the **OK** button to proceed. The **field properties** window will be displayed shortly afterwards.

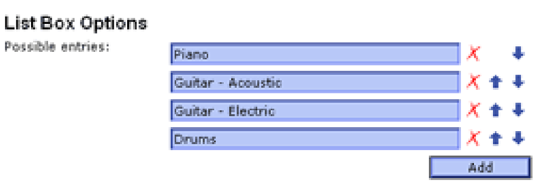
  

  - **Field Name** is set to **Musical Instrument**
  - **Field type** is set to List Box

  (in this case we have also elected to allow members to update this information from the **my profile** area of the web site).

- Click the **Add** button to finish adding this field to the group notes for this group.

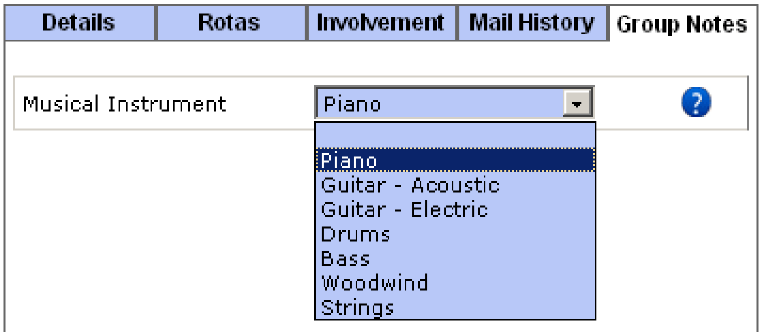
- In this case we have chosen to use the **list box** field type which limits possible entries to a pre-defined list. Click the button next to the **musical instrument** field in the list to add to the list of possible entries as illustrated below:

  Use the **add** button to add a new pre-defined entry.

- Once the list is complete click the **save and exit** button to save your changes.

- You can check that the group note has been created successfully by clicking on the musicians **group members** tab and selecting any name from the list of group members. The **group** notes view should now have the musical instrument option you have just created:



Sharing the musical instrument field

Supposing that the Youth Group leader now wants to know which of the people in the Youth Group can play a musical instrument. Before he adds a new group note to the Youth Group called "musical instrument" he notices that one already exists and that you are one of the owners of this field. When you share this group note with him he will be able to see the information you stored **for the people in his group who also belong to the musicians group**. He will also then be able to update the information for all people in his group including those who are not in the musicians group.

To share the "Musical Instrument" field:

- Click the **Musicians** group in the **Site Manager** area of the web office navigation pane.
- Select the **Group Members** tab; the group members view will be displayed shortly afterwards.
- Click the :

  task link; the **field editor** will be displayed shortly afterwards. Any existing group notes for this group will be listed in a table.
- Click the **[select]** option in the **sharing** column of the "Musical Instrument" field.
- The group structure of your church will be displayed in a new window shortly afterwards. Use the ⊞ and ⊟ buttons to show or hide any sub-folders to locate the **Youth** group and check the box next to it.
- Click the **Save** button to commit your changes.

Note: if you are not a database manager for the **Youth** group you will no longer be able to edit the properties of the field once you have shared it. Once another group is relying on the data you have shared, it would be inconvenient for them if you were to change the structure of the information in it (you can of course still edit the contents of the fields). You must therefore be a database manager on all the groups where a field exists in order to be able to change its properties.

- The Youth Group leader can now see which members of his Youth Group play an instrument.

Tip: to see which groups are sharing a field click the ? button next to any entry in the **group notes** view of the **member info** window.

Updating the group notes 'en masse'

In the example above it might be useful to go through each member of the group now and update the "musical instrument" field to an appropriate setting. You could of course click on each person in the **group members** tab, show the **group notes** view and update their details accordingly. The following is a much faster method however:

- Select the appropriate group from the **Site manager** area of the web office navigation pane.
- Click on the **group members** tab; the **group members** view will be displayed shortly afterwards.
- Select the:

  Edit Group Notes stored for the **Youth** group

  task link; a list of fields you can update will be displayed shortly afterwards:

Edit	Field Name	Description	Info
☐	Musical Instrument		?

  the list is divided into two groups:

  - Those group notes which belong to the selected group.
  - Those group notes which belong to a parent group which you have the permission to edit. These fields are included because every member of your current group will also be a member of the parent group.

- Tick the fields you would like to update and click **next**.
- The members of your group will be displayed in a list with the fields you have elected to update alongside:

Member Name	Musical Instrument
Alan Cooper	Guitar - Acoustic
Dean Morgan	Drums
Ranjeev Gug	Bass
Shirley Boast	Piano

- Once you have finished updating the information click the **save changes** button to confirm your alterations.

  Tip: you can also use this window to sort existing information. Click on the **musical instrument** heading in the example above to sort the list of people by the entries you have given. The list will group those with the same entries so that everyone who plays an instrument moves to the top of the list. This feature could also be used to find out who has paid the deposit on a church weekend away or which members of the PA team have been trained in lighting.

A final note about 'sensitive' fields

Some of the information you may wish to store in your group could be considered 'sensitive' material – for example pastoral notes, medical conditions etc. The **sensitive field** property therefore provides you with an extra layer of security to keep this information private. Fields that have been marked as sensitive can **only** be seen by those people with the **group notes editor** privilege **and** the **sensitive group notes** privilege. You can create both sensitive global fields and sensitive group notes.

For example, supposing as the leader of the **children's work** group you wish to create a group note called **police checked** to record who has been submitted for child protection checks. The **sensitive field** option allows you to store this information without making it available for other **group notes editors** in the **children's work** group to see.

You should of course remember that anyone with the **sensitive group notes** privilege for one folder will be able to see sensitive fields for any sub-folder. This means that a person with a high level of privilege may have access to any sensitive information you are holding. If you are unsure who can see the fields marked as 'sensitive' for your group, display the **permissions** view for your group and check which names have the **sensitive group notes** permission checked.