the Pathway
Group LEADER Guide
June 2016

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Getting Started

To get the most out of the Pathway as a tool for managing and communicating with your group, we recommend you take 5 minutes to verify your personal information and privacy settings. Especially your email address since this is where all group inquiries and communications will go. Select your name and "Edit Profile."

See the Group Member Guide for more information on setting privacy settings.

General Navigation

After logging in, all the groups you are a part of are listed down the right side of the screen. Serving teams that you or others in your family belong to are considered "groups" in the system along with Grow Groups, Sunday School Classes, Bible Studies, and Sports and Rec. Choose your group to manage message boards, files, and events for your group.

When you are in a group, there are 8 menu items across the top; you will use 6 of them:
1. Info: General group information, including address where group meets.
2. Messages: Send messages to and view messages from group members.
3. Calendar: Events for the group.
4. Files: Files the group leader(s) have uploaded.
5. Needs: Needs that the group leaders have posted for your group.
6. Participants: People in your group.

Group Actions Menu

Under your name in the upper left corner you can also choose Group Actions which has 7 options. We'll look

at those with an * in more detail

1. Edit group settings*
2. Edit participant list*
3. Send participant logins – You can issue logins to anyone in your group so they can more quickly access the system. It will only issue a login to people who have never logged in to the Pathway.
4. Record attendance – You can elect to get attendance reminders when setting up events which will generate an email to record attendance and generally not have to use this menu item.
5. Send a Twext – send a text to those who have opted to receive texts. You can also link this to a twitter account and it will post on the twitter account as well.
6. Send a mail merge – to send people an email that does not post to the message board
7. Print labels or name tags
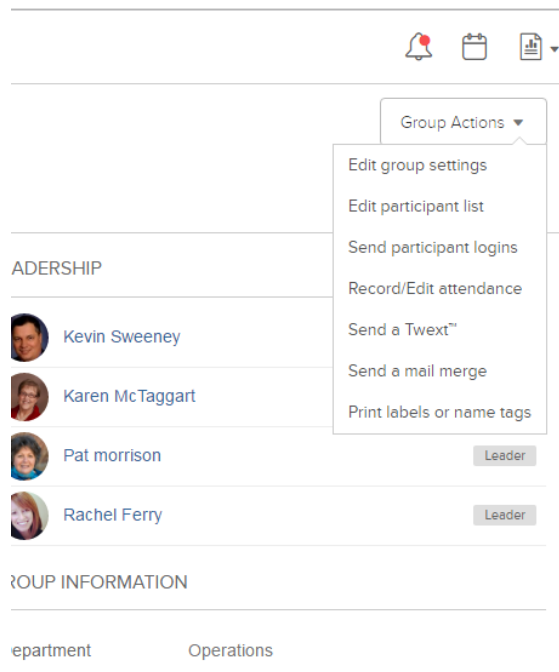
Verify/Update Group Info (for public search)

Once you are in your group, select "Edit Group Settings" from the Group Actions Menu. You will see the below screen with 4 options in the blue bar. The primary 2 you will use are "General" and "When & Where."

General

a. Upload a photo of yourself, a book study you are doing or anything you think represents your group well.
b. Verify the description of your group. This is what people will see when they search groups online.
c. Indicate if childcare is available.
d. Link a twitter account to your group (optional).

When & Where

Change the day of week, time of day and area of town.

Options

The Settings should be set already by a Church Admin. If your group is designed for members to interact, it will be indicated here. Additionally, the Public Search option will only be selected for Grow Groups. All other groups can be joined via links on the website or by invitation from the Group Leaders.

Responding to Group Inquiries/Sign-up

When someone selects your group from the public search, they can send you an email asking questions or asking to join the group. You need to do 2 things when you receive this:

1. Click on their name in blue and send them an email – answer any questions and/or welcome them to the group.
2. Add them to your Participant List in your group

Edit Participant List

Select "Edit participant list" to see:

» Who is in your group
» Add new members
» Delete Members – see Note 1
» Invite new people
» View membership requests. Membership requests only land here when people request to join while logged in to the Pathway. **Those not logged in send you an email and you will need to add them to your participant list for them to be in the group.**
» Assign people as co-leaders, thereby giving them access to help manage the group and communications. See Note 1.

Note 1: To do one of these, click the box to the left of the persons name, then select the applicable action item from the drop down menu at the top and hit "ok"

Record Attendance:

Attendance is a tool that can help you record group discussions for future reference, prayer and praise requests, who specifically attended, and anything about guests who visited. This is a great tool to help you

shepherd your group and to aid in keeping others informed on personal spiritual growth and group progress.

You can choose to receive an attendance reminder (highly recommended). You will receive an email reminder before group, and then if not recorded after group, then if still not recorded the next day and one more time.

Simply click the email link. You won't have to login to record information so its easy to do from your mobile device. You MUST have "events" (your meetings) on your group calendar to record attendance. So we'll cover that next! Events allow you to specify "event organizer" so if you want to specifically assign the attendance/prayer/notes task to someone, you can do this without giving them access to all the other leader functionality.

While you have the option to record specific attendance of individuals or headcount, we recommend you record actual attendance and note reasons why absent members didn't attend to help monitor if someone is disengaging or have had legitimate conflicts.

You can send a summary of the attendance, notes from your meeting, praise and prayer requests to leaders only, the entire group or no one. If you send it to all, those that were absent can keep up with what's happening in the group.

Calendars and Events

There are 3 different calendars you can view in the Pathway:

1. Groups Calendar (for each group you are a member) – access it after choosing the group and choosing Calendar.

2. My Calendar (reflects events for all groups you belong in one calendar) – access it from the home page, Family Calendar (reflects events for all members of your immediate family)
3. Church-Wide Calendar (reflects all open events at Carmel UMC) – access it from the home page.

Events on the calendar: To find out more information about an event, simply click the event on the calendar for more information.

Add an Event

While your group information is established for promotion/search purposes, you will need to set up your group meetings as "Events" to add them to your group calendar AND to use the attendance functionality.

1. Click the date of your first meeting on the calendar and in the upper left corner "add event" will pop up. Click it.

2. If you are meeting at the church, check the box next to "Rooms and Resources needed."
3. Fill out the information, and indicate if you want the event to repeat and when to end the repeat.
4. Once you have filled out the information, you'll be on the Event page. Choose the button on the bottom right that says "+Request Rooms & Resources" if you want to meet at church.

5. Available rooms will be in black, and can be drug over to the box on the left to reserve the room. Rooms that are in grey (like the living room below) are not available to reserve. Note in the screenshot below there are two tabs. One for Rooms (as shown) and one on Resources (TVs, tables, chairs etc). There are also two different drop down menus for rooms: Children's Ministry Rooms and Other Rooms. So if you don't see the room you are looking for, choose the other drop down menu. Note: When requesting rooms and resources, your event is shown as pending until they are approved.
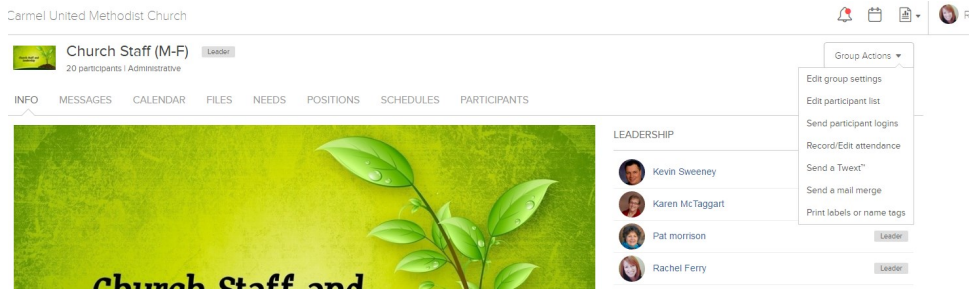
6. Edit Attendance Settings so you can utilize "Attendance" functionality. Choose "Regular Events" and mark the box "Send Group Leaders Attendance Reminders."

Communicating with Your Group:

There are 3 ways you can communicate with your group members:

1. Messages under main group menu
2. Twext under Group Actions
3. Mail merge under Group Actions

Messages: Allows you to send message and opt to pin them to a bulletin board for people to refer back to. Choose the Messages tab to send messages and/or view messages pinned to the message
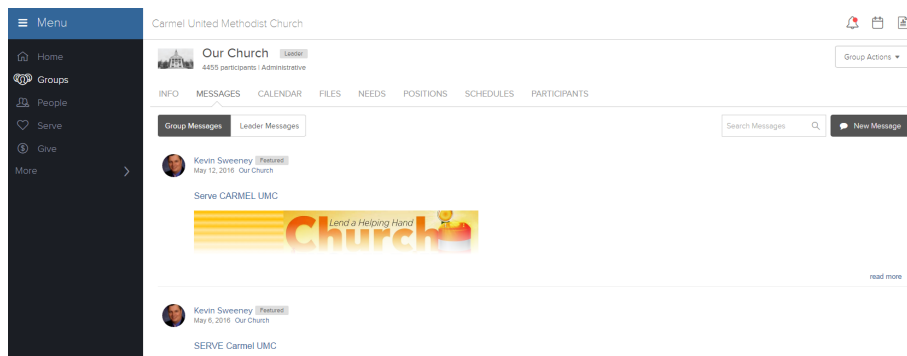
board. This is ideal for members who prefer to go retrieve info instead of receiving/managing emails received.

Twext: Sends a text message to everyone in your group who has opted to receive text messages from the group. You can also link a twitter account (under "Edit Group Settings" then "General") and the message will post to the twitter account as well.

Mail Merge: Sends an email that does not post to the message board.

Communication Settings:

Set communication preferences to customize how often you want to receive communications from your

groups: Click your name in the upper right corner from any screen and choose "Communication Settings." Choose your preferences separately for each group you belong to and for future groups. You can choose to get all emails, to get a weekly summary, and/or to receive text messages from the group. Or you could opt not to receive communications, but instead go out and retrieve information by viewing the message page.

Note: The Group Member Guide also explains Communication Settings and Privacy Settings (specifying what contact info you want to share with others in your group) so each member can decide what

form of communications they want to receive from the group. To maximize communications, encourage your group members to set their communication and privacy settings.

Group Needs

You can utilize the Needs page to set up needs of group members such as meals, babysitting while someone is in the hospital, gathering supplies for a care package etc. People in your group can volunteer to take care of needs and everyone will be able to see which needs are still not met. This could also be used for a party and assigning things to bring. It helps eliminate extra emails back and forth to communicate outstanding needs and avoids multiple people offering to take care of the same need since everyone can see the status as needs are met.

Group Files

Allows you to upload files that your group members can view and/or print. This document and the Group Member Guide are files loaded as part of the Connection Group Leaders group that you belong to so you can refer and share them anytime.

Questions?

We love questions about the Pathway as it means you are using it!!!! For questions about additional uses and functionality in the Pathway you can email info@carmelumc.org or call the church office at 317-844-7275.