Managing Small Groups in Access ACS (11/14/17)

Compiled by Linda J Burke (lindajburke66@gmail.com)

The Small Groups feature of ACCESS is a tool that lay leaders can use to make working on projects easier. It draws on the information that is contained in MVUC's database. To use Small Groups, you will need to log in to ACCESS through the MVUC webpage.

To Set Up a Subgroup, Contact an ACS ACCESS administrator with your request for adding a group or subgroup under your committee. The administrator will create the subgroups, then you can add members to the roster.

As a group leader, you can manage your small groups and activities in Access ACS. This guide covers these tasks:

A. See Available Small Groups
B. Locate Individuals In Your Groups
C. View A Group's Roster
D. Export Group Information To Excel
E. E-Mail A Small Group
F. Print Mailing Labels For A Small Group
G. Print A Directory For A Small Group
H. Add Details about Your Group
    a. Group Description
    b. Meeting Times
    c. Other Group Details

<u>A. See available small groups</u>

1. Under **I Want To View. .,** click on Available Small Groups
2. If want additional information, select **Request Info** in upper right hand corner, and send an e-mail to the leader of the group.
3. Or, Point to **Groups** tab, and select **Small Groups** to see the organizational structure of Groups.

B. <u>Locate individuals in your groups</u>

1. Point to **Directories**, then click **Locate Individual.**
2. In the Last Name field, enter the individual's last name.
3. In the First Name/Goes-By Name field, enter the individual's first name.
4. Click **Run Search.**
5. To view the individual's information, click the name.

<u>C. View a group's roster</u>

1. On the Access ACS Dashboard, click **Groups** > **My Groups**.
2. If you cannot see your groups, be sure to click on **+** sign in upper right hand corner of box.
3. Under **My Small Groups**, click on the name of the master group you want to view.
4. When the roster displays, you can click **View by Date** to view the roster as of a selected date.
5. As a leader, you can add, drop or delete members from your roster.

    d. Add members by selecting the group under **My Small Groups**.
    e. Select **Add** button
    f. Next window will ask what position you are adding, and provide a search box.
    g. Select the individuals from the list, then select **Add to roster**.

D. Export group information to Excel

1. On the Access ACS Dashboard, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. When the roster displays, select the names of the group members' whose information you want to export.
4. Under **Roster**, in the **I want to...** drop-down list, select **Export to Excel**, then click **Go**.
5. Select the fields to include in your export, then click **Export**.

E. E-mail a small group

1. On the Access ACS Dashboard, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. Select the members you want to e-mail.
4. Under **Roster**, in the **I want to...** drop-down list, click **Send a Message**, then click **Go**.
5. To change the **Reply To** and **Subject** fields, click **Change**. These fields are automatically inserted.
6. Enter any additional e-mail addresses to send the message to.
7. Enter a subject for the message.
8. **Optional:** In the **Form Field** drop-down list, you can search for an insert information into the e-mail. The correct information displays in the delivered e-mail.

- **Small Group Leader's Name —** Inserts the small group leader's name in the generated e-mail.
- **Small Group's Name —** Inserts the small group name in the generated e-mail.
- **Requester's Name —** Inserts the name of the individual interested in the small group in the generated e-mail.
- **Requester's Phone Number —** Inserts the phone number of the individual interested in the small group in the generated e-mail.
- **Requester's E-mail Address —** Inserts the e-mail address of the individual interested in the small group in the generated e-mail.
- **Requester's Message —** Inserts the individual's message in the generated e-mail.

- **Requester's Availability —** Inserts the individual's availability in the generated e-mail.
- **Site Name —** Inserts the name of the site in the generated e-mail.

9. **Optional:** Select to **Send this message to the parents of children**. For example, this is helpful if the participants of the small group are teens and the information in the e-mail is concerning payment for a retreat.
10. Compose your message, then click **Send Message.**

F. To print mailing labels for a small group

1. On the Access ACS Dashboard, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. Select the members you want to print labels for.
4. Under **Roster**, in the **I want to...** drop-down list, click **Print Mailing Labels**, then click **Go**.
5. Under **Label Type**, select **Individual Mailing Label** or **Family Mailing Label**.
6. Under **Label Selection**, select the label you want to print (2 per page or 3 per page).
7. Click **Preview**. Your labels display as a PDF file that you can print.

G. Print a directory for a small group

1. On the Access ACS Dashboard, click **Groups** > **My Groups**.
2. Under **My Small Groups**, click on the name of the master group you want to view.
3. Select the members you want to include in the directory
4. Under **Roster**, in the **I want to...** drop-down list, click **Print Directory**, then click **Go**.
5. Select the type of directory to print, then click **View Directory**.
6. To print the directory, click **Print**.

H. Add Details about Your Group

1. **My Groups**, then **My Small Groups**, click on the name of the group you are a leader of. This will open a Small Groups detail page.
2. On the ribbon with the group name, use the pull-down **I want to. .** menu, select **Edit Group.**
3. The next three windows will allow you to:
   A. add a Group Description,
   B. set meeting times,
   C. and give other details, including scheduling a reminder.
4. Select **Done** at the bottom of window to save changes, and **Continue** to move to the next window.
5. **Note:** Changes you make to meeting times and locations **DO NOT** automatically get on the church calendar. Currently that is a separate process.