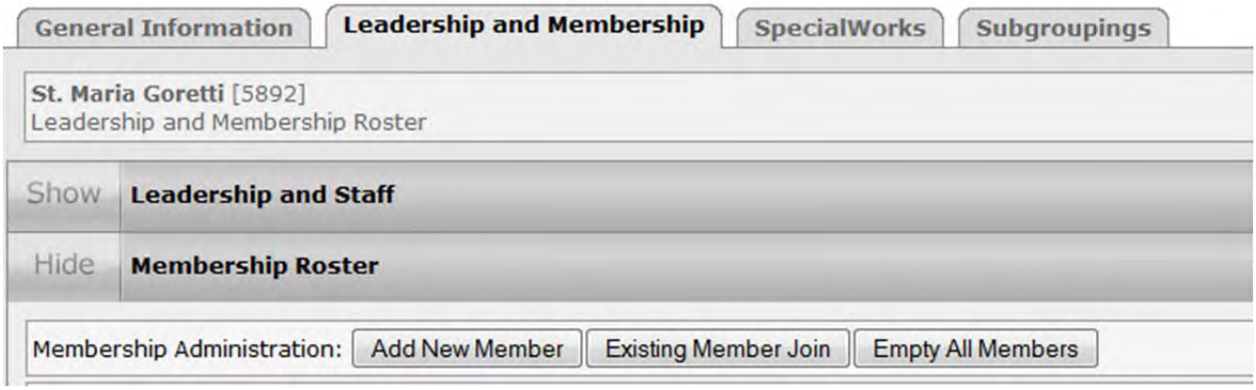
Grouping Tabs

Information for each grouping in the National database is displayed in tabular form. There are four tabs: General Information, Leadership and Membership, Special Works, and Subgroupings. The default view is the Leadership and Membership tab.

Leadership and Membership

This tab shows members and leaders in the selected grouping. The tab is divided into two sections-Leadership and Staff and Membership Roster. You can Hide or Show either section by clicking on those words on the left side of the section.



Membership Section

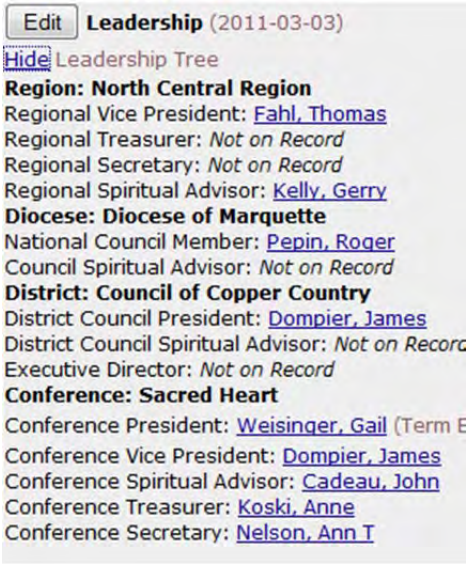
The Membership Roster section is the defaulted section. Its view is open when you first get to the tab. The Membership Roster section contains the member roster. All members entered into the database will show on the page. No matter the number of members on the roster they will all appear on one page. If the roster is longer than the view of the browser, scroll bars will appear on the right side of the page so that you may see all of the members.

Leadership Section

The Leadership and Staff section can be viewed by clicking on word Show next to the title. This screen will slide downward to display the leadership of the conference. When the Leadership and Staff section is open you will see the current listing of leadership and staff for the grouping. The leadership will be on the left side. There is an Edit Leadership button followed by the current date in Parentheses.

The Show leadership tree is listed, followed by the position and name of each member of leadership. Each name is underline and in blue making it a link to the individual members record in the database.

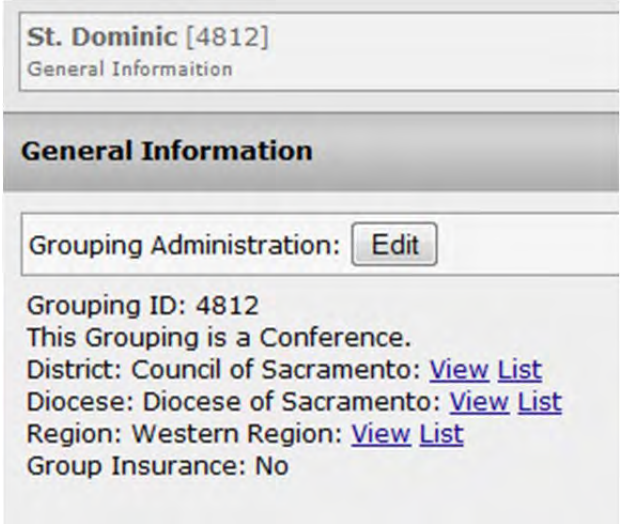
If you click on the Show Leadership Tree link (the word Show, underlined and in blue), you will see the see how the grouping falls into the structure of the database and the leadership on record for each level of that structure.



Additional information about both sections and how to add members to Leadership and Membership can be found in documents pertaining to those subjects.

General Information

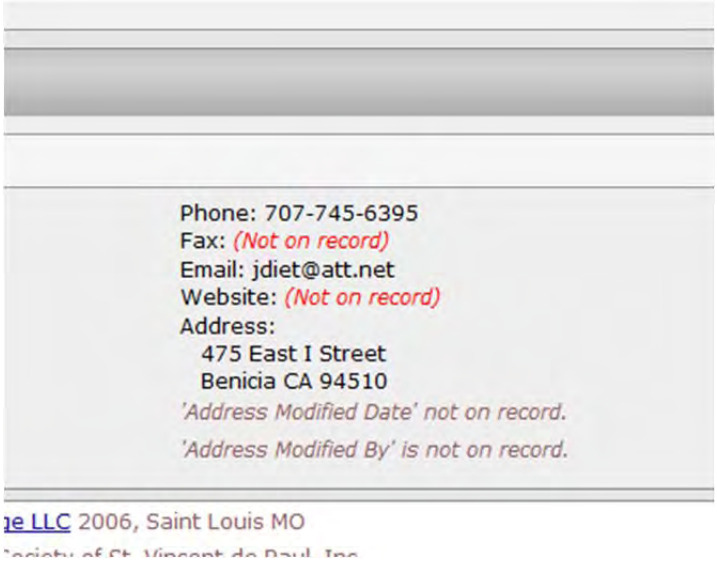
Clicking on the General Information tab will display information about the grouping. On the left hand side of the page information about a groupings place in the structure of the Society can be found.



The name of the grouping is listed with the GroupingId number in brackets behind the name. Below is the Grouping Administration Edit button. Clicking on the button will allow contact information about the grouping to be edited. This includes address, phone, email contact, and web site address. Selecting Edit will take you to a screen that allows you to change the information for the grouping.

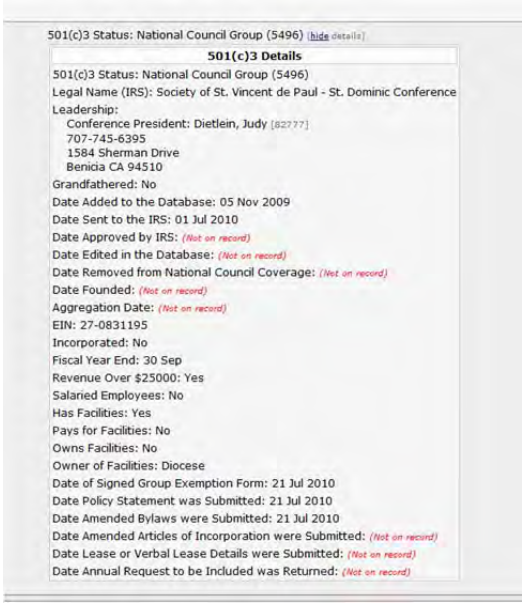
When you are finished with the changes simply click on Save Changes. Additional grouping information follows the Edit button. You will see the Grouping ID again. Next is an explanation of what kind of grouping the entity is followed by the structure in which it resides. (i.e. the District, Diocese and Region it belongs to if applicable) Beside the name of each of the structures level you will find a link for the View and List at that level. Those links are the words View and List underlined and in blue. Enrollment status for Group Insurance follows the structure links. Please note **only** National Office staff can change enrollment in Group Insurance and the National 501 c (3) grouping.

The middle of the General Information tab contains information about the grouping that can be edited from the Grouping Administration Edit button.



To the right is the 501 c (3) National Council group detail section along with links to the entities above the current grouping in the structure of the Society. These links are underlined and in blue. They will take a user directly to the **View** of the entity named. Just below the structure links is a section that shows information about an entities status in the 501 c (3) National Grouping .

Clicking on show , will allow you to view information about the entity that pertains to 501 c (3) including founding, aggregation and institution date (as applicable).



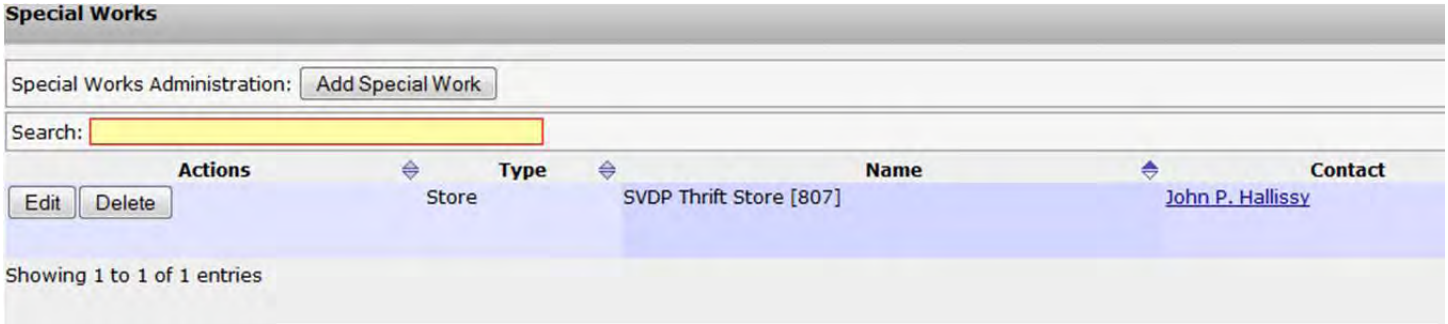
Entities included in the National Grouping are notated as such following 501(c) 3 Status: . If the entity is included National Council Group (5496) will appear. If the grouping has no affiliation on record the word None will appear. Other options include Self Covered and Covered by other grouping.

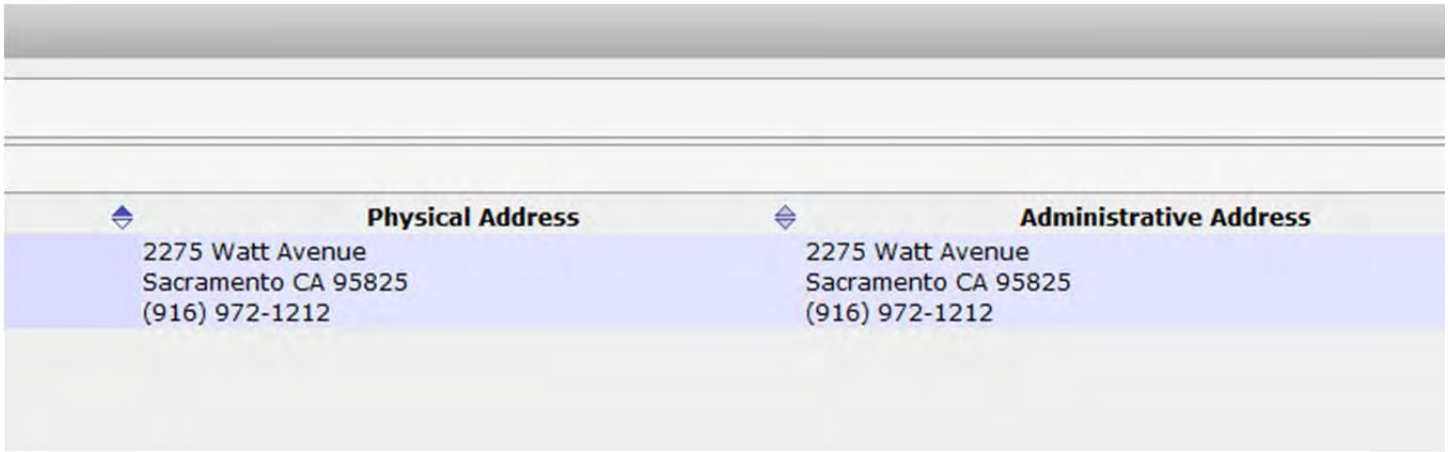
Special Works Tab

Special Works may be added to a grouping under the Special Works tab. When selected the tab displays information about any special works associated with the grouping. Historically, special works have been associated with Councils but recently many Conferences have created and maintained special works.

The defaulted view of the Special Works tab shows general information about special works in the grouping. This information includes the ability to edit information on the special work or delete it(must be an administrator for the entity to complete those tasks), the type of special work, the name of the special work, the contact person for the special work, and a physical and administrative address for the special work .

(screen broken into two images below)





Adding a Special Work

A Special Work can be added to the listing for a grouping by clicking on the Add Special Work button. It is found just above the listing of special works for a grouping. Information for the special work can then be inputted and submitted.

Notice that they Type of Special Work, and the Contact Person are drop down selections. The type of special work is chosen from the dropdown list.

If the special work is of a new or unusual type please select other.

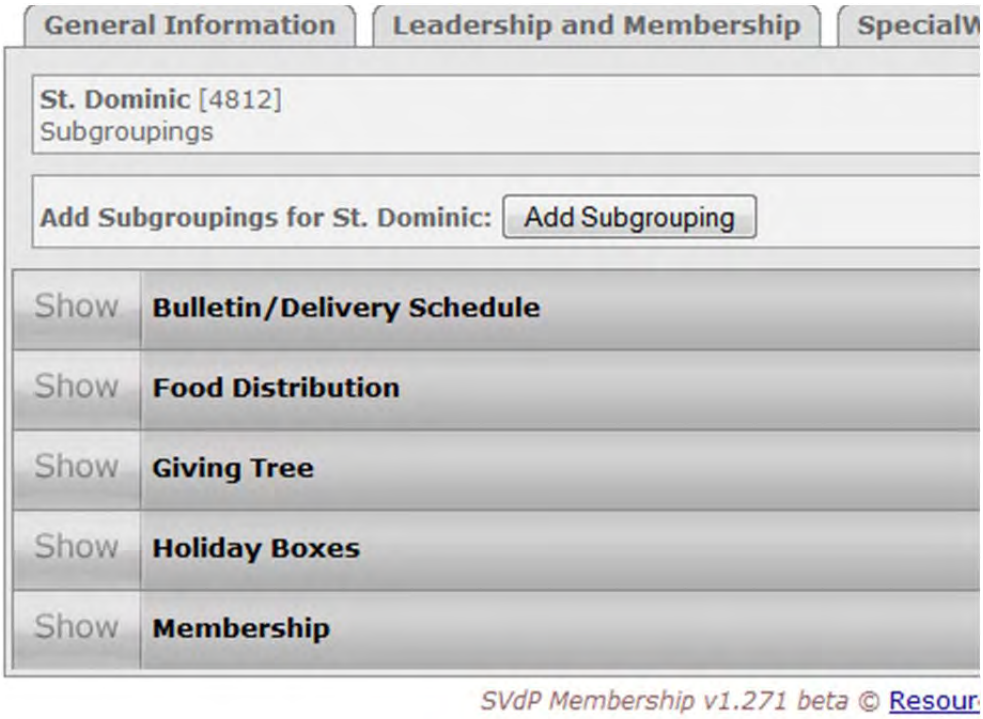
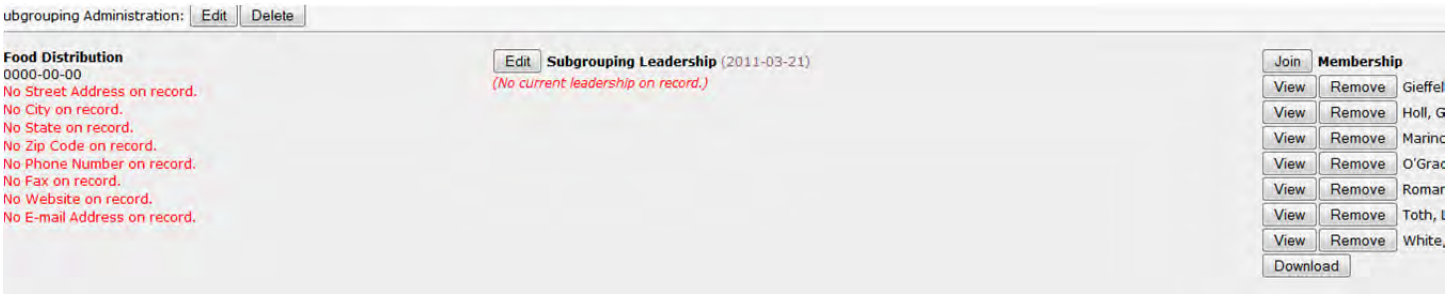
The Contact Person must be chosen from the dropdown selection. The list of choices includes everyone who is on the member roster for the grouping. If the actually contact person is not on the member roster you must add them as a member before you can select them. Remember the member roster can include active, associate members, contributing and non-members (volunteers).

Once all of the information is entered for the Special Work, click on Add Special Work. The newly added special work will appear on the listing.

Subgrouping Tab

Information on the subgrouping tab pertains to small groups with your conference, council, ect. This can include many different types of subgroups such as boards, food distribution groups and holiday program groups. Special works such as stores and pantries are not subgroups.

Much like the Leadership and Membership page, subgroupings are list with in an accordion style with the word Show on the far left.



Clicking on Show will display the details of each subgrouping. The information displayed is very similar to the grouping information. The address, leadership and membership of the subgroup is displayed. Editing this information works just like it does for a grouping.